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Outdoor Furniture & Grills

Industry Study with Forecasts for **2015 & 2020**

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The market will benefit from continued interest among consumers in extending their living space outdoors by constructing such areas as patios, porches and decks.

US demand to grow 4% annually through 2015

US demand for outdoor furniture and grill products is expected to increase 4.0 percent annually to almost \$7 billion in 2015. This growth reflects an improvement over the 2005-2010 period, when reduced consumer spending on durable goods associated with the economic recession of the latter years limited demand for these products. The market for outdoor furniture and grill products (including patio heaters and accessories such as umbrellas, covers, cushions and grilling utensils) will benefit from continued interest among consumers in extending their living space outdoors by constructing such areas as patios, porches and decks. The growing popularity of outdoor rooms designed to coordinate with the décor inside one's home will further boost demand as consumers continue to invest in higher quality products. Continued increases in imports, particularly of inexpensive products from low-cost countries, will limit value gains to some degree.

Grills & accessories to be fastest growing segment

The grill and related accessories segment is expected to see the fastest demand growth through 2015, as consumers increasingly trade up to higher-end, more feature-intensive grills. However, the larger outdoor furniture and accessories segment -- which accounted for over two-thirds of value

US Outdoor Furniture & Grill Demand, 2015 (\$7 billion)



Outdoor Furniture & Accessories
68%

Grills & Accessories
28%

Patio Heaters 4%

photo: Emu

demand in 2010 -- will also experience solid demand growth, as above average demand growth for metal and wood furniture products balances slower demand growth for wicker, rattan and plastic products.

Expected housing rebound in to offer opportunities in residential market

Due to the dominance of the residential market, which accounted for nearly 95 percent of total outdoor furniture and grill demand in 2010, consumer spending and home decorating trends are significant drivers of demand. Residential consumers will continue to prefer more

stylish, higher quality outdoor furniture and grill products that provide an extension of living spaces into the outdoors. Consumers are also increasingly trading in basic, inexpensive furniture for higher quality dining and conversation sets. Going forward, the expected rebound in the housing market, combined with the continued popularity of outdoor rooms and home entertainment activities, will offer opportunities in the residential market. In the nonresidential market, which is significantly smaller than the residential market, demand will be driven by the continued popularity of outdoor dining and entertainment spaces at such establishments as restaurants, bars and hotels.

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Sample Text, Table & Chart

PRODUCTS

Supply & Demand

SAMPLE TEXT

Demand for grills is expected to reach \$1.5 billion in 2015. Continued demand for grills with infrared cooking technology will help support demand growth. The market is expected to grow for most types of grills. Over the next five years, demand for better quality grills will restrict market. The ongoing replacement of grills is the most value growth, since the average grill is more expensive than the average charcoal one. However, competition in the grill market and strong growth in low-cost imports will prevent even faster gains.

Countering the trend towards more expensive grills is the very small but growing market for single-use disposable charcoal grills. The best known of these products is P&M Products' EZ GRILL, which is primarily marketed for picnics, camping, tailgating and other occasions when portability and simple disposal instead of clean up are desired. Because they are so inexpensive, often retailing for around \$10, growth in demand for disposable grills will have little effect on the overall grill market in value terms.

While both charcoal and gas grills are popular in a number of settings, electric grills are especially popular in multiunit housing, in large part because many cities limit the use of grills on apartment balconies or on condominium patios. These regulations -- often loosely enforced -- combined with condominium or apartment community regulations and common sense choices regarding grill ownership have tended to restrict the electric grill segment in multiunit housing settings, since many residents cook without an open flame.

For the past decade, the US trade deficit in grills has continued to widen, reaching \$310 million in 2010. Grills are primarily imported from China.

92

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TABLE IV-2

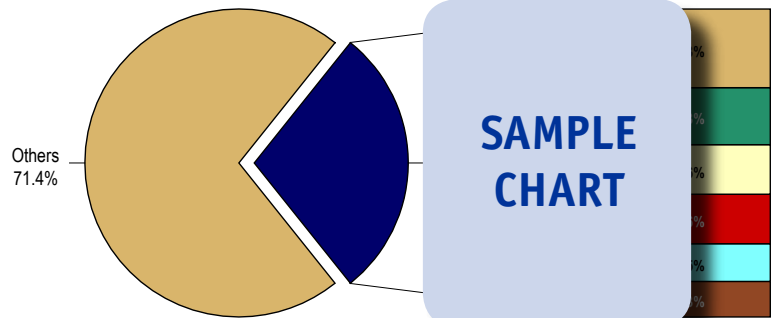
RESIDENTIAL OUTDOOR FURNITURE & GRILL DEMAND BY HOUSING TYPE (million dollars)

Item	2000	2005	2010	2015	2020
Households (million)					
\$ furniture & grills/household					
Residential Outdoor Furniture & Grills:					
Single-Family Housing					
Multifamily Housing					
Manufactured Housing					
% residential					
Outdoor Furniture & Grill Demand					

SAMPLE TABLE

CHART VI-1

US OUTDOOR FURNITURE & GRILL MARKET SHARE BY COMPANY, 2010 (\$5.7 billion)

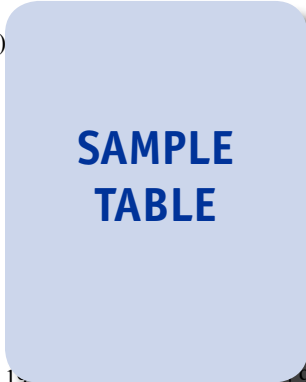


SAMPLE CHART

Sample Profile, Table & Forecast

TABLE V-7
NORTHEAST OUTDOOR FURNITURE & GRILL DEMAND BY SUBREGION & PRODUCT
 (million dollars)

Item	2000	2005	2010	2015	2020
Northeast Housing Stock (million units)					
\$ furniture & grills/housing unit					
NE Outdoor Furniture/Grill Demand					
By Subregion:					
New England					
Middle Atlantic					
By Product:					
Outdoor Furniture					
Grills					
Patio Heating Products					
% Northeast	19	20	20	20	20
Outdoor Furniture & Grill Demand	4408	5745	5705	6955	8190



COMPANY PROFILES

Century Furniture LLC
 401 11th Street Northwest
 Hickory, NC 28603
 828-328-1851
 http://www.centuryfurniture.com

Annual Sales:
 Employment:

Key Products: mahogany and other wood, a

SAMPLE PROFILE

Century Furniture is a manufacturer and marketer of indoor and outdoor luxury furniture. The Company is privately held.

The Company is active in the US outdoor furniture and grill industry via the production and sales of outdoor furniture via the CENTURY LEISURE and MARSEILLE lines. In addition, certain furniture is offered through collections commissioned by designers, such as the OSCAR DE LA RENTA collection and the RICHARD FRINIER collection, which includes the ARCHIPELAGO, ANDALUSTA, DENPASAR, ESTANCIA, ORIENT, PLEIN AIR, SOUTH BEACH, METROPOLITAN, RIVIERA, GULF STREAM and KYOTO product lines. Representative furniture from Century Furniture includes dining and lounge chairs; sofas, loveseats and chaises; ottomans; bar stools; and dining, cocktail, bar, console and side tables. These products are made from aluminum, stainless steel, Honduran mahogany and other wood, and synthetic woven materials, among others.

Century Furniture has manufacturing activities in Hickory, North Carolina. The Company's furniture is sold across the US and in 20 other countries worldwide.

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"Demand for outdoor furniture and grills in the Northeast is expected to increase just 2.8 percent annually to \$1.2 billion in 2015, well below the national average but an improvement over the declines experienced during the 2005-2010 period. Gains will be limited by the comparatively slow growth in consumer expenditures and population in the region. In addition, ..."

--Section V, pg. 150

OTHER STUDIES

World Power Tools

World power tool demand is forecast to increase 4.5 percent annually through 2016 to \$28.1 billion. The Asia/Pacific region will be the fastest growing market, followed by North America. In the US, gains will be driven by a rebound in housing starts and manufacturing activity. Cordless electric tools will be the fastest growing segment. This study analyzes the \$22.5 billion world power tool industry, with forecasts for 2016 and 2021 by product, market, world region and for 25 countries. The study also evaluates company market share and profiles industry players.

#2996 February 2013 \$6300

Power & Hand Tools

Demand for power and hand tools in the US will rise 4.8 percent per year to \$13.1 billion in 2016. Power tools will outpace hand tools, as power tools -- especially cordless electric tools -- benefit from greater capacity for innovation. Professional demand growth will outpace consumer gains due to a rebound in housing starts and increases in manufacturing output. This study analyzes the \$10.4 billion US power and hand tool industry, with forecasts for 2016 and 2021 by product and market. The study also evaluates company market share and profiles industry players.

#2941 August 2012 \$5200

Lawn & Garden Consumables

US packaged lawn and garden consumables demand will rise 3.3 percent yearly to \$8.8 billion in 2016. Pesticides and fertilizers will remain the top segments, with fertilizers, seeds and growing media the fastest growing. Organic formulations will outpace conventional types, but from a much smaller base. This study analyzes the \$7.5 billion US lawn and garden consumables industry, with forecasts for 2016 and 2021 by product, formulation, market, application, end user and US region. The study also evaluates company market shares and profiles industry players.

#2891 May 2012 \$5100

World Power Lawn & Garden Equipment

World power lawn and garden equipment demand will rise 4.8 percent yearly through 2015. North America and Western Europe will remain dominant markets, with the US alone claiming over 60 percent of new demand. Lawnmowers will remain the top segment, while turf and grounds equipment leads gains. This study analyzes the \$14.9 billion world power lawn and garden equipment industry, with forecasts for 2015 and 2020 by product, market, world region and for 22 countries. The study also evaluates company market share and profiles industry players.

#2797 August 2011 \$6100

Home Organization Products

US demand for home organization products will rise 3.6 percent annually through 2015. Gains will be supported by new decorative and specialty home organization products and by strong growth in larger, more expensive closet and garage systems. Bins, baskets and totes will remain the largest segment while modular units grow the fastest. This study analyzes the \$7.2 billion US home organization product industry, with forecasts for 2015 and 2020 by material, product, room and market. The study also evaluates company market share and profiles industry players.

#2774 June 2011 \$4900

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