



[CLICK TO VIEW](#)

[Table of Contents 2](#)

[List of Tables & Charts 3](#)

[Study Overview 4](#)

[Sample Text, Table  
& Chart 5](#)

[Sample Profile, Table &  
Forecast 6](#)

[Order Form & Corporate  
Use License 7](#)

[About Freedonia,  
Custom Research,  
Related Studies, 8](#)

# World Power Tools

---

Industry Study with Forecasts for **2016 & 2021**

---

Study #2996 | February 2013 | \$6300 | 377 pages

---

[www.freedoniagroup.com](http://www.freedoniagroup.com)



**The Freedonia Group**

767 Beta Drive

Cleveland, OH • 44143-2326 • USA

Toll Free US Tel: 800.927.5900 or +1 440.684.9600

Fax: +1 440.646.0484

E-mail: [info@freedoniagroup.com](mailto:info@freedoniagroup.com)

## Table of Contents

### EXECUTIVE SUMMARY

### MARKET ENVIRONMENT

General .....	4
World Economic Outlook.....	5
Recent Economic Performance.....	5
Macroeconomic Outlook.....	7
World Population Overview .....	11
World Urbanization Patterns .....	13
Personal Income & Expenditure Trends .....	15
Fixed Investment Trends .....	17
World Construction Outlook .....	19
World Motor Vehicle Park.....	21
Power Tool Pricing Patterns .....	23
Technology & Product Innovations.....	25
Environmental Regulations .....	28

### OVERVIEW

General .....	30
Regional Overview.....	31
Demand .....	31
Production.....	34
International Trade .....	37
Demand by Type .....	39
Electric .....	41
Electric Tool Demand by Product.....	42
Drills .....	43
Saws.....	45
Sanders, Polishers, & Grinders .....	47
Other Electric Tools .....	48
Parts & Accessories .....	50
Electric Tool Demand by Power Source .....	52
Plug-In .....	53
Cordless .....	54
Pneumatic .....	57
Engine-Driven & Other.....	59
World Power Tool Demand by Market .....	60
Professional.....	61
Consumer .....	64

### NORTH AMERICA

General .....	66
United States .....	72
Canada .....	80
Mexico .....	86

### WESTERN EUROPE

General .....	91
Belgium .....	97
France.....	103
Germany.....	108
Italy .....	113
Netherlands .....	118
Spain .....	123

Sweden .....	128
Switzerland .....	133
United Kingdom.....	138
Other Western Europe .....	143

### ASIA/PACIFIC

General .....	150
Australia.....	156
China .....	162
India .....	168
Indonesia .....	173
Japan.....	178
South Korea .....	184
Taiwan .....	189
Thailand .....	194
Other Asia/Pacific .....	199

### OTHER REGIONS

Central & South America: General .....	206
Brazil.....	212
Other Central & South America.....	217
Eastern Europe: General .....	222
Poland .....	227
Russia.....	232
Other Eastern Europe.....	237
Africa/Mideast: General.....	242
South Africa .....	247
Turkey.....	252
Other Africa/Mideast .....	257

### INDUSTRY STRUCTURE

General .....	262
Industry Composition .....	263
Market Share .....	264
Product Development & Manufacturing .....	268
Marketing .....	269
Distribution .....	271
Professional.....	271
Consumer .....	272
Financial Requirements .....	274
Mergers/Acquisitions/Industry Restructuring ..	275
Cooperative Agreements.....	277

### COMPANY PROFILES

Actuant Corporation .....	280
Apex Tool Group.....	285
Atlas Copco.....	288
Blount International.....	293
Bosch (Robert) GmbH .....	296
Changzhou Heli Electric Appliance .....	302
DEPRAG-Schulz GmbH .....	303
Emerson Electric .....	305
Fini Nuair Group.....	309
Grainger (WW) Incorporated .....	310
Great Neck Saw Manufacturers.....	313
Hilti AG .....	315

Hitachi Koki.....	319
Husqvarna AB.....	323
Illinois Tool Works.....	329
Ingersoll-Rand plc.....	333
Jiangsu Dongcheng Power Tools .....	335
Jiangsu Jinding Electric Tools .....	336
Kingfisher plc .....	337
Kulkarni Power Tools.....	340
Makita Corporation .....	341
Metabowerke GmbH .....	345
Newell Rubbermaid.....	347
Panasonic Corporation .....	350
Ryobi Limited.....	352
Senco Brands .....	353
Shanghai Ken Tools .....	355
Snap-on Incorporated .....	356
Stanley Black & Decker .....	358
STIHL Holding .....	367
Techtronic Industries .....	369
Textron Incorporated .....	373
TRUMPF Group .....	375
Zhejiang Huafeng Electric Tools.....	377

## List of Tables/Charts

### EXECUTIVE SUMMARY

1 Summary Table.....	3
----------------------	---

### MARKET ENVIRONMENT

1 World Gross Domestic Product by Region ..	11
2 World Population by Region .....	13
3 World Urban Population by Region .....	15
4 World Per Capita Gross Domestic Product by Region.....	17
5 World Fixed Investment by Region .....	19
6 World Construction Expenditures by Region .....	21
7 World Motor Vehicle Park by Region.....	23
Cht Power Tool Pricing Deflators, 2001-2021 ..	25

### OVERVIEW

1 World Power Tool Demand by Region .....	33
Cht World Power Tool Demand by Region, 2011 .....	34
2 World Power Tool Production by Region....	36
Cht World Power Tool Production by Region, 2011 .....	37
3 World Power Tool Net Exports by Region ..	39
4 World Power Tool Demand by Type.....	40
5 World Electric Tool Demand by Region .....	42
6 World Electric Tool Demand by Product .....	43
7 World Electric Drill Demand by Region .....	45
8 World Electric Saw Demand by Region.....	46

(continued on following page)

## List of Tables/Charts

(continued from previous page)

9 World Electric Sander, Polisher, & Grinder Demand by Region .....	48
10 World Other Electric Tool Demand by Region .....	50
11 World Electric Tool Parts & Accessories Demand by Region .....	52
12 World Plug-In Electric Tool Demand by Region .....	54
13 World Cordless Electric Tool Demand by Region .....	56
14 World Pneumatic Tool Demand by Region .....	58
15 World Engine-Driven & Other Tool Demand by Region .....	60
16 World Power Tool Demand by Market.....	61
17 World Professional Power Tool Demand by Region .....	63
18 World Consumer Power Tool Demand by Region .....	65

### NORTH AMERICA

1 North America: Power Tool Supply & Demand.....	69
2 North America: Power Tool Demand by Type & Market .....	71
Cht North America: Power Tool Demand by Country, 2011.....	72
3 United States: Power Tool Supply & Demand.....	76
4 United States: Power Tool Demand by Type & Market.....	79
5 Canada: Power Tool Supply & Demand.....	83
6 Canada: Power Tool Demand by Type & Market.....	85
7 Mexico: Power Tool Supply & Demand .....	88
8 Mexico: Power Tool Demand by Type & Market.....	90

### WESTERN EUROPE

1 Western Europe: Power Tool Supply & Demand.....	94
2 Western Europe: Power Tool Demand by Type & Market .....	96
Cht Western Europe Power Tool Demand by Country, 2011.....	97
3 Belgium: Power Tool Supply & Demand .....	100
4 Belgium: Power Tool Demand by Type & Market.....	102
5 France: Power Tool Supply & Demand....	105
6 France: Power Tool Demand by Type & Market.....	107
7 Germany: Power Tool Supply & Demand. ....	110
8 Germany: Power Tool Demand by Type & Market.....	112

9 Italy: Power Tool Supply & Demand .....	115
10 Italy: Power Tool Demand by Type & Market.....	117
11 Netherlands: Power Tool Supply & Demand.....	120
12 Netherlands: Power Tool Demand by Type & Market.....	122
13 Spain: Power Tool Supply & Demand.....	125
14 Spain: Power Tool Demand by Type & Market.....	127
15 Sweden: Power Tool Supply & Demand ..	130
16 Sweden: Power Tool Demand by Type & Market.....	132
17 Switzerland: Power Tool Supply & Demand.....	135
18 Switzerland: Power Tool Demand by Type & Market.....	137
19 United Kingdom: Power Tool Supply & Demand.....	140
20 United Kingdom: Power Tool Demand by Type & Market .....	142
21 Other Western Europe: Power Tool Supply & Demand.....	145
22 Other Western Europe: Power Tool Demand by Type & Market .....	147
23 Other Western Europe: Power Tool Supply & Demand by Country.....	149

### ASIA/PACIFIC

1 Asia/Pacific: Power Tool Supply & Demand.....	153
2 Asia/Pacific: Power Tool Demand by Type & Market.....	155
Cht Asia/Pacific Power Tool Demand by Country, 2011.....	156
3 Australia: Power Tool Supply & Demand .....	159
4 Australia: Power Tool Demand by Type & Market.....	161
5 China: Power Tool Supply & Demand.....	165
6 China: Power Tool Demand by Type & Market.....	167
7 India: Power Tool Supply & Demand .....	170
8 India: Power Tool Demand by Type & Market.....	172
9 Indonesia: Power Tool Supply & Demand.....	175
10 Indonesia: Power Tool Demand by Type & Market.....	177
11 Japan: Power Tool Supply & Demand .....	181
12 Japan: Power Tool Demand by Type & Market.....	183
13 South Korea: Power Tool Supply & Demand.....	186
14 South Korea: Power Tool Demand by Type & Market.....	188
15 Taiwan: Power Tool Supply & Demand .....	191
16 Taiwan: Power Tool Demand by Type & Market.....	193
17 Thailand: Power Tool Supply & Demand. ....	196

18 Thailand: Power Tool Demand by Type & Market.....	198
19 Other Asia/Pacific: Power Tool Supply & Demand.....	201
20 Other Asia/Pacific: Power Tool Demand by Type & Market .....	203
21 Other Asia/Pacific: Power Tool Supply & Demand by Country.....	205

### OTHER REGIONS

1 Central & South America: Power Tool Supply & Demand.....	209
2 Central & South America: Power Tool Demand by Type & Market.....	211
3 Brazil: Power Tool Supply & Demand.....	214
4 Brazil: Power Tool Demand by Type & Material .....	216
5 Other Central & South America: Power Tool Supply & Demand.....	219
6 Other Central & South America: Power Tool Demand by Type & Market.....	221
7 Eastern Europe: Power Tool Supply & Demand.....	224
8 Eastern Europe: Power Tool Demand by Type & Market .....	226
9 Poland: Power Tool Supply & Demand ..	229
10 Poland: Power Tool Demand by Type & Market.....	231
11 Russia: Power Tool Supply & Demand.....	234
12 Russia: Power Tool Demand by Type & Market.....	236
13 Other Eastern Europe: Power Tool Supply & Demand.....	239
14 Other Eastern Europe: Power Tool Demand by Type & Market .....	241
15 Africa/Mideast: Power Tool Supply & Demand.....	244
16 Africa/Mideast: Power Tool Demand by Type & Market .....	246
17 South Africa: Power Tool Supply & Demand.....	249
18 South Africa: Power Tool Demand by Type & Market.....	251
19 Turkey: Power Tool Supply & Demand....	254
20 Turkey: Power Tool Demand by Type & Market.....	256
21 Other Africa/Mideast: Power Tool Supply & Demand.....	259
22 Other Africa/Mideast: Power Tool Demand by Type & Market.....	261

### INDUSTRY STRUCTURE

1 World Power Tool Sales by Company, 2011.....	264
Cht World Power Tool Market Share by Company, 2011.....	265
2 Selected Acquisitions & Divestitures.....	276
3 Selected Cooperative Agreements.....	278

*Gains in world power tool demand will be driven primarily by the bedrock US market, based on a rebound in US housing starts and a significant improvement in motor vehicle production.*

## World demand to rise 4.5% annually through 2016

World power tool demand is forecast to increase 4.5 percent annually through 2016 to \$28.1 billion. Gains will be driven primarily by the bedrock US market, especially as a rebound in US housing starts increases the number of professional tool users. Manufacturing activity in the country -- especially motor vehicle production -- is also expected to significantly improve, further boosting power tool demand, especially for pneumatic tools. Outside of the US, the best opportunities will exist in the developing countries of Asia. India will post the fastest gains, due to robust growth in construction, albeit from a small base. China will also record healthy growth, and is expected to overtake Japan as the second largest market behind the US. Nevertheless, power tool demand will continue to be greatest in industrialized countries.

## Cordless electric tools to be fastest growing type

Cordless electric tool demand will experience the most robust growth through 2016, advancing 8.3 percent per year. Due to their inherent convenience and mobility, cordless tools will continue to replace plug-in models. Technological improvements in the battery industry have increased the power and running time of cordless equipment, allowing these products to overcome historical price and performance disadvantages.

## World Power Tool Demand, 2016 (\$28.1 billion)



North America  
31%

Asia/Pacific  
27%

Western Europe  
26%

Other Regions  
16%

Due to their lower weight and smaller size, lithium-ion batteries are rapidly displacing nickel-cadmium models.

In the aggregate, electric power tools account for the majority of all power tool demand, as they are used extensively by both professionals and consumers in most applications. Demand for pneumatic tools, which are used almost exclusively by professionals, will be spurred by rising motor vehicle production and construction spending. Demand for engine-driven and other tool types (e.g., hydraulic, powder-actuated) will benefit from a recovery in the world's forestry industry, as lumber is a key material used in the construction industry. The continued need for these tools in

niche applications, such as metal joining, will also support advances.

## Dominant pro market to outpace consumer demand

Through 2016, growth in professional demand, which accounted for 70 percent of global power tool sales in 2011, will outpace that in consumer demand. The three major professional outlets are the construction, automotive repair, and manufacturing industries. Consumer users of power tools include hobbyists and homeowners. Demand for power tools in the consumer market will be limited by a relative lack of do-it-yourself (DIY) activity in developing areas of Asia, where inexpensive labor is plentiful.

Copyright 2013 The Freedonia Group, Inc.

[Click here to purchase online](#)

## Sample Text, Table & Chart

### ASIA/PACIFIC

#### China: Demand by Type & Market

Demand for power tools in China is expected to grow per year to \$... at the second fa... any country... benefit from the con... sion of the C... gains will come at... than that of t... fixed investment... support adva... tion of the Shang... expected to l...

**SAMPLE  
TEXT**

All major types of power tools will record strong adv... 2016. Electric tools, which will increase at the fastest rate... lated by China's growing construction industry. In particu... electric tools will increase at the fastest rate, since their gr... nience and ease of use are preferred by professional users... tools will benefit from increases in manufacturing output... motor vehicle production will bolster demand for pneumat... both domestic and foreign demand for automobiles rise.

The professional market for power tools will continu... for the vast majority of all power tool sales. Many consum... est in DIY activities and choose to hire professionals to do repair tasks... However, while consumer demand remains small in the country, China's... growing middle class will provide some opportunities for growth.

Shipments of power tools from facilities in China are forecast to... expand at a 6.2 percent annual rate through 2016 to \$... uting to the country's expanding trade surplus. Shipm... efit from continued demand in the domestic Chinese... investment on the part of multinational companies in... turing facilities. Additionally, recovery in the key US... production, since China is the largest external supplie... the US. The Chinese industry also exports to other de...

166

TABLE VI-6

CHINA: POWER TOOL DEMAND BY TYPE & MARKET  
(million dollars)

Item	2001	2006	2011	2016	2021
Gross Fixed Investment (bil 2010\$)	17	20	25	30	35
\$ power tools/000\$ GFI	0.0001	0.0001	0.0001	0.0001	0.0001
Power Tool Demand					
By Type:					
Electric Tools & Parts					
Tools					
By Product					
Drills					
Saws					
Sanders/Polishers/Grinders					
Other					
By Power Source					
Plug-In					
Cordless					
Parts & Accessories					
Pneumatic Tools					
Engine-Driven & Other					
By Market:					
Professional					
Consumer					

**SAMPLE  
TABLE**

CHART VIII-1

WORLD POWER TOOL MARKET SHARE BY COMPANY  
(\$22.5 billion, 2011)



**SAMPLE  
CHART**

## Sample Profile, Table & Forecast

### COMPANY PROFILES

#### Kulkarni Power Tools Limited

Shirol 416 103  
 Kolhapur, Maharashtra  
 India  
 91-2322-  
 http://wv

Sales: \$  
 Employe

Key Pro  
 motive p

**SAMPLE  
PROFILE**

Kulkarni Power Tools (KPT) designs and manufactures power tools primarily under the POWERMASTER brand name. The Company's products are sold throughout Asia and Africa.

The Company's power tools and accessories are designed for use in construction, woodworking, metalworking, and automotive applications. For the construction market, KPT produces impact drills, rotary hammers, chipping machine, demolition hammers, concrete core cutters, skirting polishers, and mini angle grinders. The Company's woodworking power tools include drills, heavy duty drills, mini angle grinders, and sanders and polishers. For metalworking applications, KPT makes drills, heavy duty drills, angle grinders, straight grinders, mini angle grinders, and sanders and polishers. Automotive tools from KPT comprise valve grinding and valve seat grinding products.

Specific tools made by KPT include the KPT2-20VR 20-millimeter (mm) rotary hammer with a 600-watt motor and reverse capability that is designed for rigorous concrete usage in the construction industry. Another product, the KPT670-100 100-mm angle grinder, is designed

340

Copyright 2013 The Freedonia Group, Inc.

TABLE VI-5

### CHINA: POWER TOOL SUPPLY & DEMAND

Item	2001	2006	2011	2016	2021
Population (million)					
GDP per capita					
Gross Domestic Product (bil 2010\$)					
Gross Fixed Investment (bil 2010\$)					
Urban Population (million)					
Construction Expenditures (bil 2010\$)					
New Housing Units (000 units)					
\$ power tools/capita					
\$ power tools/mil \$ GDP					
\$ power tools/000\$ GFI					
\$ power tools/000\$ construction					
000\$ power tools/new housing unit					
Power Tool Demand (mil \$)					
net exports					
Power Tool Shipments (mil \$)					

**SAMPLE  
TABLE**

"Chinese shipments of power tools reached \$6.6 billion in 2011, accounting for nearly 60 percent of all Asia/Pacific production. China is the largest net exporter of power tools in the world. In fact, the country ran a trade surplus equivalent to three-fourths of its total shipments in 2011. Because China is such an important supplier of power tools, Chinese production was adversely affected by declines in many West European countries, as well as in the US, during the 2006-2011 period."  
 --Section VI, pg. 163



**OTHER STUDIES**

**Batteries**

US demand for primary and secondary batteries is expected to grow 4.2 percent per year to \$17.1 billion in 2017. Lithium batteries will offer the best growth opportunities in both the rechargeable and primary battery segments. Secondary batteries will continue to supplant primary batteries as high-drain electronic devices increase in popularity. This study analyzes the \$13.9 billion US battery industry, with forecasts for 2017 and 2022 by product and market. The study also reviews battery technology, evaluates company market share and profiles industry players.

#3075 ..... November 2013 ..... \$5300

**World Power Lawn & Garden Equipment**

Global demand for power lawn and garden equipment is forecast to rise 4.2 percent per year through 2017 to \$21.7 billion. Growth will be supported by a recovery in the massive US market, and by an expansion of the middle class in several developing countries of the Asia/Pacific region. This study analyzes the \$17.7 billion world power lawn and garden equipment industry, with forecasts for 2017 and 2022 by product, market, power source, world region, and for 21 countries. The study also evaluates company market share and profiles industry players.

#3067 ..... September 2013 ..... \$6300

**World Security Equipment**

World demand for security equipment will advance 7.0 percent annually to \$117 billion in 2016. The fastest gains will be in parts of Asia, Eastern Europe, Africa, and the Middle East where security markets are relatively underdeveloped. The dominant electronic security products segment will outpace mechanical security equipment. This study analyzes the \$83.1 billion world security equipment industry with forecasts for 2016 and 2021 by product, market, world region and for 18 major countries. The study also evaluates company market share and profiles industry participants.

#3005 ..... March 2013 ..... \$6300

**Power Lawn & Garden Equipment**

Demand for power lawn and garden equipment in the US is expected to grow 4.0 percent annually through 2017, reaching \$10.6 billion. Turf and grounds equipment will record the most rapid gains, followed by hedge trimmers. The commercial market will outpace the dominant residential segment, driven by landscapers. This study analyzes the \$8.7 billion US power lawn and garden equipment industry, with forecasts for 2017 and 2022 by material, product, market, and US region. The study also evaluates company market share and profiles industry competitors.

#3008 ..... April 2013 ..... \$5100

**World Robots**

Global robot demand will rise 10.5 percent annually through 2016 to \$20.2 billion. Five countries -- the US, Japan, Germany, China, and South Korea -- will continue to dominate demand, with the US remaining the largest national market. Smaller, less expensive service robots will outpace more sophisticated, high-value industrial and medical robots. This study analyzes the \$12.3 billion world robot industry, with forecasts for 2016 and 2021 by type, market, world region and for 14 countries. The study also evaluates company market share and profiles industry players.

#2950 ..... December 2012 ..... \$6100

**About The Freedonia Group**

The Freedonia Group, Inc., is a leading international industry market research company that provides its clients with information and analysis needed to make informed strategic decisions for their businesses. Studies help clients identify business opportunities, develop strategies, make investment decisions and evaluate opportunities and threats. Freedonia research is designed to deliver unbiased views and reliable outlooks to assist clients in making the right decisions. Freedonia capitalizes on the resources of its proprietary in-house research team of experienced economists, professional analysts, industry researchers and editorial groups. Freedonia covers a diverse group of industries throughout the United States, the emerging China market, and other world markets. Industries analyzed by Freedonia include:

- Chemicals • Plastics • Life Sciences • Packaging • Building Materials • Security & Electronics • Industrial Components & Equipment • Automotive & Transportation Equipment • Household Goods • Energy/Power Equipment

[Click here to learn more about Freedonia](#)

**Freedonia Custom Research**

Freedonia Custom Research delivers the same high quality, thorough and unbiased assessment of an industry or market as an industry study. Since the research initiative is based upon a company's specific needs, companies harness Freedonia's research capabilities and resources to answer unique questions. When you leverage the results of a Freedonia Custom Research engagement, you are able to obtain important answers to specific questions and issues associated with: mergers and acquisitions, new product launches/development, geographic expansion, entry into new markets, strategic business planning, and investment and funding decisions.

Freedonia Custom Research is ideal for companies seeking to make a strategic difference in the status quo and focus on future business growth. Working side by side with clients, Freedonia's team is able to define a research project that is custom-tailored to answer specific questions and provide the basis from which a company can make informed business decisions.

[Click here to learn more about Custom Research](#)



[Click here for complete title list](#)



[Click here to visit freedoniagroup.com](http://www.freedoniagroup.com)