Power Lawn & Garden Equipment

US Industry Study with Forecasts for **2017 & 2022**

Study #3008 | April 2013 | $5100 | 330 pages

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US Industry Study with Forecasts for ***2017 & 2022***

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Increasing consumer spending on durable goods, landscaping services, and recreation such as golf, will help boost demand for both consumer and commercial outdoor power equipment.

US demand to grow 4% annually through 2017

Demand for power lawn and garden equipment in the US is expected to grow 4.0 percent per year through 2017, reaching $10.6 billion as the market rebounds from the slight decline posted over the 2007-2012 period. As GDP growth accelerates and income and consumer confidence levels rise, consumers will be increasingly willing to spend their disposable incomes on durable goods, landscaping services, and recreational activities such as golf, helping boost demand for both consumer and commercial outdoor power equipment.

Turf, grounds equipment to be fastest growing type

Turf and grounds equipment will record the most rapid market gains through 2017, stimulated primarily by an expansion in the number and average size of landscaping firms. Hedge trimmers and blowers, vacuums, and sweepers will also experience healthy sales expansions through 2017 as climbing personal incomes and landscaping revenues support a shift in demand away from unpowered equipment. Lawnmowers are by far the largest product segment and will return to growth over the 2012-2017 period, stimulated by a rebound in housing completions.

Higher landscaping firm revenues will also be the primary driver for increased commercial sales of power lawn and garden equipment, as landscapers hire additional employees and invest in new equipment in order to capitalize on growth opportunities. While sales of outdoor power equipment to golf courses and government purchasers will also recover from declines posted over the 2007-2012 period, demand in these markets will increase at a much slower rate through 2017 than in the landscaping market. Sales in the golfing industry will be hampered by continued course closings as the market corrects itself from the oversupply issues that emerged in the middle of the first decade of the 2000s. Although government demand will rise in absolute terms, spending on power lawn and garden equipment will continue to decline as a percentage of public spending, reflecting increasing public scrutiny and fiscal pressures.

More battery-powered and robotic units to boost gains

Several technological trends will significantly impact the power lawn and garden equipment market, none more so than the introduction of more electric equipment -- particularly battery-powered units -- in both the residential and commercial markets. Improvements in battery technology will drive increased sales of larger units that use this power source, especially riding lawnmowers. Demand for robotic mowers will also climb rapidly through 2017 and beyond, as buyers increasingly opt for the convenience of these products as prices drop and their performance improves.

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Sample Text, Table & Chart

MARKETS

Commercial

Power lawn and garden equipment demand in the comm
mark SAMPLE percent annually, reaching $
in 20 from the sales declines reco
the 2 the residential market forec
Equi TEXT ial users will benefit from c
grow US landscaping establishm
repre e of commercial equipment
Additi arger, high value commercial
such as turf and grounds mowers that were postponed during
sion will support overall dollar gains through 2017. On the
the golf course segment will continue to suffer as course clo
number openings, and as a result equipment demand will no
quickly in this market. Sales to the government and other se
also rise at a below average rate going forward as federal, st
public agencies continue to face pressure from their citizenr
in spending on parks and grounds maintenance, although de
private athletic facilities and other maintained green spaces
as personal consumption expenditures climb.

Commercial users of power lawn and garden equipment typically include professional landscaping establishments, golf courses, and grounds maintenance crews for government and other nonresidential facilities. Continuing a long-standing historical pattern, landscaping firms will account for the vast majority of all sales to comme
in 2017.

Many outdoor power equipment manufacturers have sp
operations for the commercial or professional markets. Thes
can entail not only separate products -- such as larger turf an
mowers, blowers, and trimmers -- but also distinct sales, ma
distribution practices. For example, commercial equipment

TABLE V-1

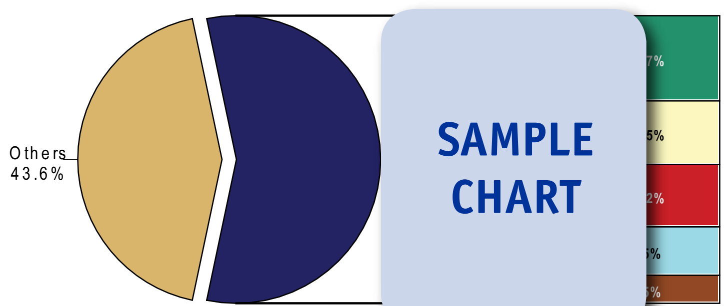
POWER LAWN & GARDEN EQUIPMENT SUPPLY & DEMAND (million dollars)

Item	2002	2007	2012	2017	2022
Households (mil)					
$ equipment/household					
Power Lawn/Garden Equip Demand					
Lawnmowers					
Turf & Grounds Equipment					
Trimmers & Edgers					
Garden Tractors & Rotary Tillers					
Blowers, Vacuums, & Sweepers					
Snow Throwers					
Hedge Trimmers & Other					
Parts & Attachments					
+ net exports					
Power Lawn/Garden Equipment Shpts					
price deflator (2005=100)					
Power L&G Equip Shpt (mil 2005$)	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]

SAMPLE TABLE

CHART VII-1

POWER LAWN & GARDEN EQUIPMENT MARKET SHARE BY COMPANY, 2012 ($8.7 billion)



Sample Profile, Table & Forecast

TABLE IV-8

**GOVERNMENT EXPENDITURES & INVESTMENT
(billion dollars)**

Item	2002	2007	2012	2017	2022
Gross Domestic Product					
$ government expenditure/000$ Gl					
Government Expenditures & Investm					
By Entity:					
Federal					
National Defense					
Nondefense					
State & Local					
By Type:					
Consumption Expenditures					
Gross Investment					

SAMPLE TABLE

COMPANY PROFILES

Global Garden Products Group
via del Lavoro 6
31033 Castelfranco, Veneto
Italy
39-0423
http://wv

Sales: o company)
Employ

Key Pro ow throwers, lawn
tractors, arifiers, and blowers

SAMPLE PROFILE

Global Garden Products (GGP) Group is a producer of lawn and garden equipment, including lawn mowers and tractors, trimmers, brush cutters, and snow throwers. The Company is privately held.

The Company is involved in the North American lawn and garden equipment industry through the production of walk-behind and riding mowers, snow throwers, lawn tractors, hedge and string trimmers, cultivators, scarifiers, and blowers. These items are marketed under such brand names as STIGA, ALPINA, MOUNTFIELD, ATCO, and CASTELGARDEN.

GGP Group maintains production facilities in Castelfranco and Campigo, Italy; Guangzhou, China; Poprad, Slovakia, and Tranås, Sweden. The Company's products are distributed worldwide through sales subsidiaries and offices located in France, the United Kingdom, Germany, Denmark, Norway, Finland, Poland, the Czech Republic, Italy, Holland, Slovenia, and Russia. The Company exited the US market in 2007 due to strong internal competition, although still exports STIGA brand lawn mowers to Canada. As of early 2013, GGP Group

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"Sales of turf and grounds mowers are forecast to post a strong rebound through 2017, growing 6.6 percent to $1.6 billion. The market for riding mowers, which dominate turf and grounds mower sales, will account for the vast majority of growth in dollar terms as pent-up demand for these expensive models that built up during the 2007-2009 economic recession continues to be released. Through 2017, accelerating growth in professional landscaping ..."
--Section V, pg. 96

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Other Studies

Outdoor Furniture & Grills

US demand for outdoor furniture and grills (including patio heaters and accessories such as umbrellas, covers, cushions and grilling utensils) will rise 4.0 percent annually to $7.5 billion in 2017. Outdoor furniture and accessories will remain the top segment, while patio heating products will grow the fastest. The residential market will remain dominant. This study analyzes the $6.2 billion US outdoor furniture and grill industry, with forecasts for 2017 and 2022 by product, market and region. The study also evaluates company market share and profiles industry players.

#3102 .... November 2013 .... $5100

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

Home Organization Products

US demand for home organization products will increase 4.0 percent per year to $9.4 billion in 2017. Modular units will be the fastest growing type and will surpass shelving as the second largest segment. Organization products used in garages and closets will be the fastest growing types by room. This study analyzes the $7.7 billion US home organization product industry, with forecasts for 2017 and 2022 by material, product, room and market. The study also considers market environment factors, evaluates company market share and profiles industry players.

#3027 .... May 2013.................... $5100

Building Maintenance Services

Revenues for contract (non-proprietary) building maintenance services will rise 4.3 percent per year through 2017 to $176.5 billion. Pest control and interior building cleaning will be the fastest growing services, while landscaping remains the largest type of service. The residential market will outpace nonresidential demand. This study analyzes the $143 billion US building maintenance service industry, with forecasts for 2017 and 2022 by service, market and US geographic region. The study also evaluates company market share and profiles industry competitors.

#3002 ....April 2013 .... $4900

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

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