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# Landscaping Products

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

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Study #3045 | July 2013 | \$5100 | 275 pages

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### INDUSTRY STRUCTURE

1 US Landscaping Product  
Sales by Company, 2012 ..... 182

*Gains will be supported by a strong rebound in the construction of new housing completions, an acceleration in existing home sales, and growth of consumer disposable income.*

## US demand to rise 6.9% annually through 2017

US demand for landscaping products is projected to grow 6.9 percent per year through 2017 to \$6.5 billion, reflecting a rebound in sales following the 2007-2009 recession and subsequent slow recovery. A strong rebound in the construction of new housing completions from low 2012 base levels will be the primary driver of growth. An acceleration in sales of existing homes, growth of consumer disposable income, and a rebound in construction expenditures in the office and commercial segment will also support gains.

## Ongoing interest in outdoor living spaces to remain key growth factor

One key growth factor for landscaping products is ongoing interest in developing outdoor living spaces, which provide additional space for relaxation and entertaining. The decorative products segment, which was the largest in 2012, comprises products that are an important component of this trend. For instance, water features, lighting, pottery, and statuary can be used to add distinctive features and centerpieces to outdoor spaces. Hardscape products, which are projected to achieve the fastest growth through 2017, can be used to create the patios, walkways, edging, and walls that form the basis of outdoor rooms. Other products such as outdoor heating elements will also post strong gains.



## Dominant residential market to grow the fastest

The residential market is the largest for landscaping products, accounting for over half of sales in 2012. Gains will be driven by a strong rebound in housing completions from a low 2012 base.

Renewed growth in existing home sales will also boost sales of landscaping products, as consumers are most likely to alter their outdoor spaces within a few years of purchasing a home. In 2012, the improvement and repair segment was larger than the new segment, a reversal of the historical relation due to a sharp reduction in new housing completions between 2007 and 2012. However, the new market is projected to rebound

through 2017, resuming its position as the larger residential segment.

The nonresidential market was also affected by the 2007-2009 recession, with a decline in nonresidential construction expenditures and elevated building vacancy rates inhibiting demand for landscaping products. Demand for landscaping products in the nonresidential market is concentrated in the office and commercial segments. Therefore, a rebound in construction expenditures will support growth as offices attempt to attract new tenants, restaurants upgrade their outdoor patios to create a higher end appearance, and company headquarters renovate their exteriors to improve their corporate image. Gains in the nonbuilding market will trail those of the other two markets, restrained by a continuing decline in the number of golf courses and limited state and local government budgets. Nonetheless, municipal efforts to address water runoff issues will support demand for permeable pavers and other related products, as will the conversion of vacant lots to community gardens and parks.

## Study Coverage

This industry study, **High-Performance Flat Glass**, presents historical demand data (2002, 2007, 2012) and forecasts for 2017 and 2022 by product, market, end user, and US region. The study also considers market environment factors, evaluates company market share and profiles 30 industry competitors.

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## Sample Text, Table & Chart

### PRODUCTS

**Concrete Pavers:** Demand for concrete pavers is projected to increase by 1.5 million, faster than the overall landscaping market. This is driven in large part by the unit housing market, which is showing a strong increase in demand for outdoor living spaces.

**SAMPLE TEXT**

The residential market is the largest user of concrete pavers, accounting for over half of demand in 2012. The primary use for these products in landscaping applications is in patios and walkways. Concrete pavers will experience especially rapid growth through the forecast period, particularly in ecologically sensitive areas. Pavers are available in a wide range of colors, shapes, and surface patterns, and are sold in home improvement stores, nurseries, and other businesses which offer landscaping products. The ability to replace individual pavers as needed and the relative ease of installation enables homeowners to install these products themselves and supports the relatively significant DIY market for these products.

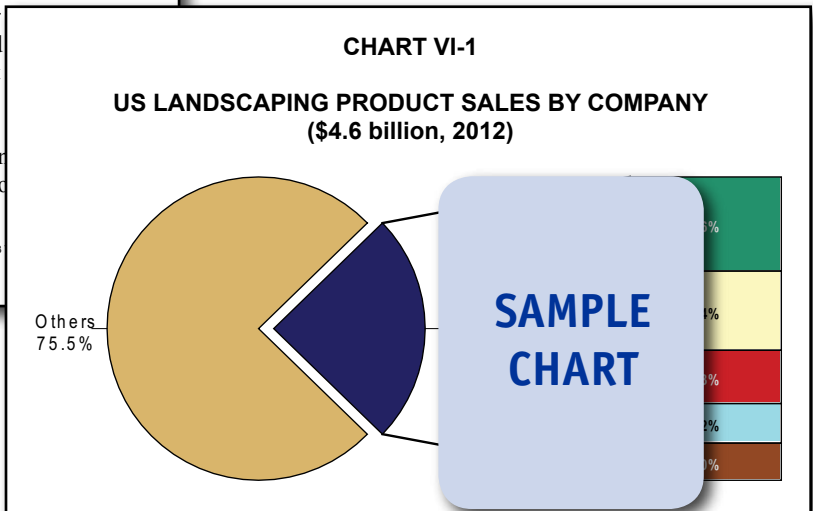
In the nonresidential market, pavers are often used for walkways, patios, and pool decks to create a more upscale look for an outdoor space. The variety of colors and shapes pavers are available in allows business owners to tailor these spaces to a particular look or match the décor of the rest of the business. Parking lots and other areas are not defined as landscaping applications in this study, but these products find use in those applications as well.

Water management issues are receiving increasing attention in the nonbuilding market. Cities are often particularly sensitive to these issues.

**TABLE III-9**  
**CONCRETE DEMAND BY TYPE, APPLICATION & MARKET**  
 (million dollars)

Item	2002	2007	2012	2017	2022
Hardscape Products Demand					
% concrete					
Concrete Demand					
By Type:					
Concrete Pavers					
Ready Mix Concrete					
Concrete Blocks/Other Concrete					
By Application:					
Patios					
Walkways					
Edging & Other					
By Market:					
Residential					
Nonresidential					
Nonbuilding					

**SAMPLE TABLE**

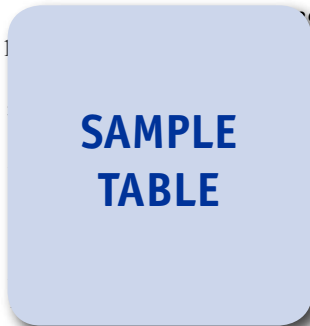


**SAMPLE CHART**

## Sample Profile, Table & Forecast

**TABLE IV-1**  
**LANDSCAPING PRODUCTS DEMAND**  
**BY MARKET & APPLICATION**  
 (million dollars)

Item	2002	2007	2012	2017	2022
Resident Population (million persons)					
\$ landscaping products/capita					
Landscaping Products Demand					
By Market:					
Residential					
Nonresidential					
Nonbuilding					
By Application:					
New					
Improvement & Repair					



**COMPANY PROFILES**

**Enquatics Incorporated**  
 16024 County Highway X  
 Kiel, WI 53042  
 920-693-7000  
 http://www.enquatics.com

Annual Sales: \$10.5 million  
 Employees: 100

Key Products: AquaMaster floating fountains, aerators, and accessory lighting systems

Enquatics Incorporated is a manufacturer of AquaMaster management systems. The Company maintains a 2,500 square foot assembly facility in Kiel, Wisconsin.

The Company participates in the US landscaping products industry through the AquaMaster Fountains and Aerators subsidiary (Kiel, Wisconsin), a manufacturer of fountains, aerators, and related accessories for landscaping and other end uses. For landscaping applications, the company makes floating and fixed fountains, aerators, and accessory lighting systems. Manufacturing operations for AquaMaster are conducted at Enquatic's plant in Kiel, Wisconsin.

Floating fountains from AquaMaster are marketed under the CLASSIC SERIES, CELESTIAL FOUNTAINS, and MASTERS SERIES brand names. CLASSIC SERIES floating fountains are decorative displays that utilize propeller technology and are available in ten different patterns. These fountains, which are designed to provide oxygen transfer and circulation, are generally used in combination with other existing fountains that feature an older propeller design. The company's MASTERS SERIES floating fountains are available with

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**STUDY  
COVERAGE**

This Freedonia industry study, **Landscaping Products**, offers historical demand data (2002, 2007, 2012) plus forecasts for 2017 and 2022 by product, market and US region. The study also considers market environment factors, examines the US industry structure, evaluates company market share data, and profiles 34 US industry players.

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**OTHER STUDIES**

**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 product 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 evaluates company market share and profiles industry players.

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

**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

**Green Building Materials**

US green building materials demand is forecast to increase 11 percent annually to \$86.6 billion in 2017. Permeable pavement and structural products (e.g., recycled concrete, FSC-certified lumber) will grow the fastest. Exterior products such as energy-efficient windows and green roofing will remain the largest segment. This study analyzes the \$51.8 billion US green building material industry, with forecasts for 2017 and 2022 by product, market and US region. The study also considers market environment factors and profiles industry participants.

#2995 ..... February 2013 ..... \$5100

**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

**Outdoor Furniture & Grills**

US demand for outdoor furniture and grill products is expected to rise 4.0 percent annually to nearly \$7 billion in 2015. The grill and related accessories segment will see the fastest growth, followed by the larger outdoor furniture and accessories segment. An expected rebound in the housing market will offer opportunities in the dominant residential sector. This study analyzes the \$5.7 billion US outdoor furniture and grill industry, with forecasts for 2015 and 2020 by product, market and region. The study also evaluates company market share and profiles industry players.

#2828 ..... January 2012 ..... \$4900

**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:

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