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# World Power Lawn & Garden Equipment

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

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Study #3067 | September 2013 | \$6300 | 422 pages

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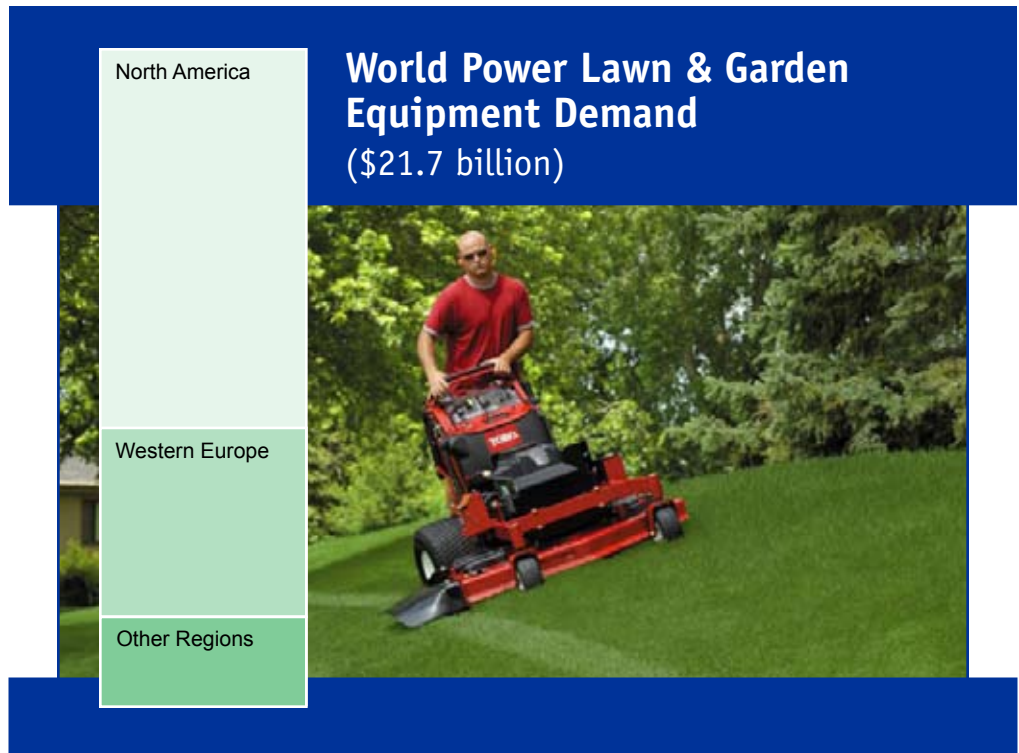
*Growth will be supported by a recovery in the massive US market, as improving consumer confidence drives increased spending on durable consumer goods and landscaping services.*

## World demand to rise 4.2% annually through 2017

Global demand for power lawn and garden equipment is forecast to rise 4.2 percent per year through 2017 to \$21.7 billion. Growth in equipment sales will be supported by a recovery in the massive US market, as an acceleration in GDP growth, rising personal incomes, and improving consumer confidence drive increased spending on durable consumer goods and landscaping services. Demand will also rebound in Western Europe as economic growth accelerates following the Euro zone economic troubles in 2012. In developing areas of the world, particularly the Asia/Pacific region, sales of outdoor power equipment will be spurred by an expansion of the middle class in several countries.

## US, Canada, Western Europe to remain dominant markets

While power lawn and garden equipment sales in developing nations will record the fastest gains in percentage terms through 2017, the US, Canada, and Western Europe will continue to account for the vast majority of world demand. Consumers in these developed nations have high income levels that allow for discretionary purchases like outdoor power equipment and landscaping services that utilize this equipment. Additionally, countries such as Canada, the United Kingdom, and the US have strong residential lawn and garden care



cultures, and most of the world's golf courses are located in these three nations.

## Turf and grounds equipment to be fastest growing products

Lawnmowers will continue to account for the biggest portion of sales among all product groups, owing primarily to the large number of homeowners who possess and maintain their own lawns in the US, Canada, and Western Europe. In these areas, most homeowners consider a lawnmower to be an essential tool and the only way to efficiently maintain a larger lawn. Turf and grounds

equipment is expected to post the fastest market gains, driven by recoveries in the professional landscaping industries in many developed nations. Furthermore, a continuing trend toward urbanization in developing countries, including those in Asia and South America, will boost the use of public parks and other green spaces, bolstering demand for turf and grounds equipment. Sales of aftermarket parts and attachments will rise at a slower rate than demand for new equipment, as economic growth in the US and Western Europe will boost per capita incomes and prompt many users to discard older units that would have required more repair and maintenance.

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## Sample Text, Table & Chart

### ASIA/PACIFIC

#### India: Supply & Demand

Demand for power lawn and garden equipment in India million in 2012, comprising seven percent of all sales in the region. The intensity of product use in India -- particularly in hold terms -- is extremely low, due to widespread poverty. While India is home to several large cities like Delhi and Mumbai, vast majority of the country's population lives in rural areas where green spaces are not maintained, further inhibiting the potential of power lawn and garden equipment markets in this country.

From 2007 to 2012, demand in India for power lawn and garden equipment rose 8.7 percent per year, well above the regional average. Demand for power lawn and garden equipment was stimulated by infrastructure development, which boosted construction spending opportunities for power lawn and garden equipment use. Further, India's small golf industry is rapidly expanding as more of the nation achieves a high standard of living, driving growth in demand for commercial turf and grounds equipment.

Shipments of power lawn and garden equipment from Indian production facilities were \$44 million in 2012, representing two percent of all product output in the region. As a result of healthy domestic demand, the Indian power lawn and garden equipment manufacturing industry grew at a healthy pace from 2007 to 2012, expanding 5.3 percent per year. However, the country is still heavily reliant upon imports to satisfy domestic demand. India had a trade deficit of \$1.2 billion in 2012, representing 10 percent of local demand. Imports were valued at \$1.6 billion, with China, the US, and Italy being the top three sources.

Imports of power lawn and garden equipment from other countries grew at a rate of 5.3 percent per annum from 2007 to 2012, a pace of the previous five years.

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**SAMPLE  
TEXT**

TABLE VI-11

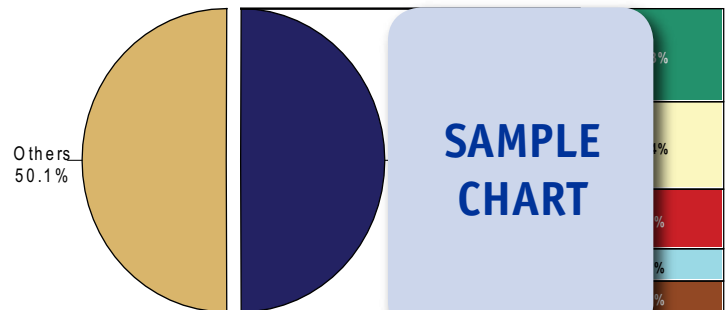
### INDIA: POWER LAWN & GARDEN EQUIPMENT SUPPLY & DEMAND (million dollars)

Item	2002	2007	2012	2017	2022
Gross Domestic Product (billion 2011\$)					
\$ GDP/capita					
Population (million persons)					
urban % of total population					
Urban Population (million persons)					
Households (million)					
\$ lawn & garden equip/household					
Power Lawn & Garden Equipment Demand					
net exports					
Power Lawn & Garden Equipment Shipments					
% India					
Asia/Pacific Power L&G Equipment Shipments					

**SAMPLE  
TABLE**

CHART VIII-1

### WORLD POWER LAWN & GARDEN EQUIPMENT MARKET SHARE (\$17.7 billion, 2012)



**SAMPLE  
CHART**

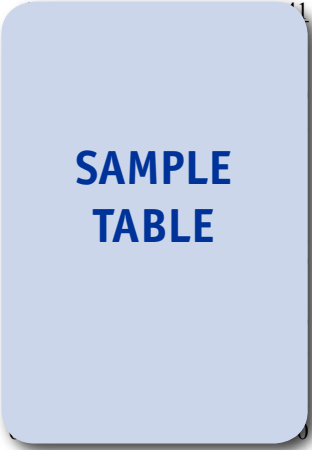
## Sample Profile, Table & Forecast

**TABLE VI-12**

**INDIA: POWER LAWN & GARDEN EQUIPMENT DEMAND BY TYPE, MARKET, & POWER SOURCE (million dollars)**

Item	2002	2007	2012	2017	2022
Power Lawn & Garden Equip Demand					
By Type:					
Lawnmowers					
Turf & Grounds Equipment					
Trimmers & Edgers					
Other Equipment					
Parts & Attachments					
By Market:					
Residential					
Commercial					
By Power Source*:					
Internal Combustion Engine					
Electric					
% India					
A/P Power L&G Equipment Demand					

\*Does not include parts & attachments. Source: The Freedonia Group, Inc.



### COMPANY PROFILES

**Global Garden Products Group**  
 Global Garden Products Group  
 Via del J  
 31033  
 Italy  
 39-423-  
 http://w

Sales: ( company)  
 Employ

Key Products: lawn tractors, string trimmers, brush cutters, hedge trimmers, snow throwers, blowers, chipper/shredders, cultivators, scarifiers, vacuums, and tillers

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 participates in the world power lawn and garden equipment industry through the manufacture and marketing of walk-behind and riding mowers, lawn tractors, string trimmers, brush cutters, hedge trimmers, snow throwers, blowers, chipper/shredders, cultivators, scarifiers, vacuums, and tillers. These products are marketed through the ALPINA, ATCO, CASTELGARDEN, MOUNTFIELD, and STIGA brand names to customers in over 100 countries throughout the world.

**Products** -- The ALPINA line comprises lawn mowers, lawn tractors, string trimmers, brush cutters, hedge trimmers, snow throwers, and blowers. Lawn mowers are offered in walk-behind and robotic models.

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### STUDY COVERAGE

**World Power Lawn & Garden Equipment** is a Freedonia study that offers historical data (2002, 2007, 2012) plus forecasts for 2017 and 2022 for power lawn and garden equipment supply and demand, as well as demand by type, market and power source in six regions and 21 countries. The study also details market environment factors, evaluates company market share and profiles 42 key competitors in the global industry.



**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

**Janitorial Equipment & Supplies**

US demand for janitorial equipment and supplies (excluding chemical and most household-grade products) will advance 1.7 percent per year through 2017 to \$7.2 billion. Manual cleaning products and bags and containers will be the fastest growing types. The institutional buildings and residential markets will offer the best growth opportunities. This study analyzes the \$6.6 billion US janitorial equipment and supply industry, with forecasts for 2017 and 2022 by type, market, and purchaser. The study also evaluates company market share and profiles industry competitors.  
 #3086..... September 2013..... \$5100

**Landscaping Products**

US demand for landscaping products is projected to grow 6.9 percent per year through 2017 to \$6.5 billion. Hardscape products will grow the fastest, driven by demand for patios and other features of outdoor rooms. The residential market will be the fastest growing segment, driven by a strong rebound in new home construction. This study analyzes the \$4.6 billion US landscaping products industry, with forecasts for 2017 and 2022 by type, market, end use, and US region. The study also evaluates company market share and profiles industry players.  
 #3045..... July 2013..... \$5100

**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

**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

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