



[CLICK TO VIEW](#)

[Table of Contents 2](#)

[List of Tables & Charts 2](#)

[Study Overview 4](#)

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

[Sample Profile, Table & Study Coverage 6](#)

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

World Lawn & Garden Consumables

Industry Study with Forecasts for 2019 & 2024

Study #3265 | March 2015 | \$6200 | 344 pages

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Table of Contents

EXECUTIVE SUMMARY

MARKET ENVIRONMENT

General	4
World Economic Overview.....	5
Recent Historical Trends.....	5
World Economic Outlook.....	6
World Demographic Outlook.....	9
World Population Outlook.....	9
World Urban Population Outlook.....	11
Household Formation Patterns.....	13
World Consumer Spending Patterns.....	15
World Building Construction Outlook.....	19
Golf Course Outlook.....	21
Landscaping/Lawn Care Industry Outlook ..	23
Environmental & Regulatory	
Considerations.....	24
North America.....	25
Western Europe.....	28
Other Regions.....	30

OVERVIEW

General	31
Demand by Product.....	31
Fertilizers.....	34
Pesticides.....	37
Growing Media.....	42
Seeds.....	45
Other Consumables.....	47
Demand by Market.....	49
Professional.....	51
Consumer.....	54
Demand by Region.....	57
Relationship between GDP per Capita	
& Lawn & Garden Consumables	
Demand per Capita.....	60

NORTH AMERICA

General	63
United States.....	69
Canada.....	75
Mexico.....	82

WESTERN EUROPE

General	88
France.....	94
Germany.....	101

Italy.....	106
Netherlands.....	112
United Kingdom.....	117
Other Western Europe.....	123

ASIA/PACIFIC

General	131
Australia.....	137
China.....	141
India.....	147
Japan.....	152
South Korea.....	157
Other Asia/Pacific.....	161

OTHER REGIONS

Central & South America.....	168
Brazil.....	173
Other Central & South America.....	177
Eastern Europe.....	182
Poland.....	187
Russia.....	191
Other Eastern Europe.....	195
Africa/Mideast.....	200

INDUSTRY STRUCTURE

General	204
Market Share.....	209
Mergers, Acquisitions, &	
Industry Restructuring.....	213
Joint Ventures & Cooperative Agreements	218
Marketing & Competitive Strategies.....	222

COMPANY PROFILES

Agrium Incorporated.....	225
BASF SE.....	232
Bayer AG.....	237
Central Garden & Pet.....	244
COMPO GmbH.....	249
DLF-TRIFOLIUM A/S.....	254
Dow Chemical.....	258
DuluxGroup Limited.....	264
DuPont (EI) de Nemours.....	269
Groupe Limagrain.....	271
Haifa Chemicals.....	275
Israel Chemicals.....	278
JCAM Agri.....	283
Monsanto Company.....	285
Premier Tech.....	289
Sakata Seed.....	293

Simplot (JR) Company.....	305
Spectrum Brands.....	310
Sumitomo Chemical.....	314
Sun Gro Horticulture.....	319
Syngenta AG.....	323
Turf Care Supply.....	329
Westland Horticulture.....	331
Yara International.....	334
Additional Companies	
Mentioned in Study.....	342-344

List of Tables/Charts

EXECUTIVE SUMMARY

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

MARKET ENVIRONMENT

1 World Gross Domestic	
Product by Region.....	9
2 World Population by Region.....	11
3 World Urban Population by Region.....	13
4 World Households by Region.....	15
5 World Personal Consumption	
Expenditures by Region.....	19
6 World Building Construction	
Expenditures by Region.....	21

OVERVIEW

1 World Lawn & Garden Consumables	
Demand by Product.....	33
Cht World Lawn & Garden Consumables	
Demand by Product, 2014.....	34
2 World Lawn & Garden Fertilizer	
Demand by Type & Region.....	37
3 World Lawn & Garden Pesticide	
Demand by Type & Region.....	42
4 World Lawn & Garden Growing Media	
Demand by Type & Region.....	44
5 World Lawn & Garden Seed	
Demand by Type & Region.....	47
6 World Lawn & Garden Other	
Consumables Demand	
by Type & Region.....	49
7 World Lawn & Garden Consumables	
Demand by Market.....	50
8 World Professional Lawn & Garden	
Consumables Demand	
by Market & Region.....	54

List of Tables/Charts

(continued from previous page)

9	World Consumer Lawn & Garden Consumables Demand by Region.....	57
10	World Lawn & Garden Consumables Demand by Region	59
Cht	World Lawn & Garden Consumables Demand by Region, 2014.....	60
Cht	Per Capita Lawn & Garden Consumables Demand/Per Capita GDP Relationship, 2014.....	62

NORTH AMERICA

1	North America: Lawn & Garden Consumables Demand by Market	66
2	North America: Lawn & Garden Consumables Demand by Product...	68
Cht	North America: Lawn & Garden Consumables Demand by Country, 2014.....	68
3	United States: Lawn & Garden Consumables Demand by Market	72
4	United States: Lawn & Garden Consumables Demand by Product...	75
5	Canada: Lawn & Garden Consumables Demand by Market.....	78
6	Canada: Lawn & Garden Consumables Demand by Product.....	81
7	Mexico: Lawn & Garden Consumables Demand by Market.....	85
8	Mexico: Lawn & Garden Consumables Demand by Product.....	87

WESTERN EUROPE

1	Western Europe: Lawn & Garden Consumables Demand by Market	91
2	Western Europe: Lawn & Garden Consumables Demand by Product...	93
Cht	Western Europe: Lawn & Garden Consumables Demand by Country, 2014.....	94
3	France: Lawn & Garden Consumables Demand by Market.....	98
4	France: Lawn & Garden Consumables Demand by Product.....	100
5	Germany: Lawn & Garden Consumables Demand by Market..	104

6	Germany: Lawn & Garden Consumables Demand by Product..	106
7	Italy: Lawn & Garden Consumables Demand by Market.....	110
8	Italy: Lawn & Garden Consumables Demand by Product.....	111
9	Netherlands: Lawn & Garden Consumables Demand by Market..	115
10	Netherlands: Lawn & Garden Consumables Demand by Product..	117
11	United Kingdom: Lawn & Garden Consumables Demand by Market..	120
12	United Kingdom: Lawn & Garden Consumables Demand by Product..	123
13	Other Western Europe: Lawn & Garden Consumables Demand by Market..	126
14	Other Western Europe: Lawn & Garden Consumables Demand by Product & Country.....	128

ASIA/PACIFIC

1	Asia/Pacific: Lawn & Garden Consumables Demand by Market..	134
2	Asia/Pacific: Lawn & Garden Consumables Demand by Product..	136
3	Australia: Lawn & Garden Consumables Demand by Market.....	139
4	Australia: Lawn & Garden Consumables Demand by Product.....	141
5	China: Lawn & Garden Consumables Demand by Market.....	145
6	China: Lawn & Garden Consumables Demand by Product.....	147
7	India: Lawn & Garden Consumables Demand by Market.....	150
8	India: Lawn & Garden Consumables Demand by Product.....	152
9	Japan: Lawn & Garden Consumables Demand by Market.....	155
10	Japan: Lawn & Garden Consumables Demand by Product.....	156
11	South Korea: Lawn & Garden Consumables Demand by Market..	159
12	South Korea: Lawn & Garden Consumables Demand by Product..	160
13	Other Asia/Pacific: Lawn & Garden Consumables Demand by Market..	164
14	Other Asia/Pacific: Lawn & Garden Consumables Demand by Product & Country.....	166

OTHER REGIONS

1	Central & South America: Lawn & Garden Consumables Demand by Market.....	171
2	Central & South America: Lawn & Garden Consumables Demand by Product.....	172
3	Brazil: Lawn & Garden Consumables Demand by Market.....	175
4	Brazil: Lawn & Garden Consumables Demand by Product.....	177
5	Other Central & South America: Lawn & Garden Consumables Demand by Market.....	180
6	Other Central & South America: Lawn & Garden Consumables Demand by Product.....	182
7	Eastern Europe: Lawn & Garden Consumables Demand by Market..	185
8	Eastern Europe: Lawn & Garden Consumables Demand by Product..	187
9	Poland: Lawn & Garden Consumables Demand by Market.....	190
10	Poland: Lawn & Garden Consumables Demand by Product.....	191
11	Russia: Lawn & Garden Consumables Demand by Market.....	194
12	Russia: Lawn & Garden Consumables Demand by Product.....	195
Cht	Asia/Pacific: Lawn & Gardles Demand by Market.....	198
13	Other Eastern Europe: Lawn & Garden Consumables Demand by Market..	198
14	Other Eastern Europe: Lawn & Garden Consumables Demand by Product..	200
15	Africa/Mideast: Lawn & Garden Consumables Demand by Market..	203
16	Africa/Mideast: Lawn & Garden Consumables Demand by Product & Country.....	205

INDUSTRY STRUCTURE

1	World Lawn & Garden Consumables Sales by Company, 2014	208
Cht	World Lawn & Garden Consumables Market Share, 2014.....	210
2	Selected Acquisitions & Divestitures ..	215
3	Selected Cooperative Agreements	220

The professional market will be supported by robust construction activity and increased development of urban greenspaces, while consumer demand will be promoted by the growing popularity of gardening.

World demand to rise 3.7% annually through 2019

World demand for lawn and garden consumables -- including packaged fertilizers, pesticides, growing media, seeds, and other products -- is projected to advance 3.7 percent per year to \$19.5 billion in 2019. Gains in the professional segment will be faster than in consumer applications, supported by robust construction activity and increased investment in the development of urban greenspaces. Consumer demand will be promoted by the continued popularity of gardening as a hobby in developed regions and increasing numbers of small container or community gardens in urban areas in developing regions. Improving economic conditions and construction expenditures will support gains in the bedrock US market and in other mature markets such as those in Western Europe. In developing regions, continued increases in personal incomes and living standards will support gains above the world average.

Professional market to outpace consumer segment

In the professional market, rebounding construction spending in developed nations and continued expansion of infrastructure in industrializing areas will support rising demand for products used in new landscaping. Efforts to increase greenspace in densely populated cities, particularly in China, will also promote demand. Additionally, landscaping at urban residential complexes in China

World Lawn & Garden Consumables Demand, 2019 (\$19.5 billion)



North America

Western Europe

Asia/Pacific

Other Regions

and elsewhere is often handled by professional service companies, further boosting lawn and garden consumables demand as housing stock expands. However, environmental concerns, particularly those related to fertilizers and pesticides, will prevent faster gains in developing regions. In the golf course segment, declining numbers of rounds played coupled with environmentally sustainable initiatives will hinder growth, primarily in developed regions, although rising interest in golf in Asia and Africa will support increases in these markets.

In the consumer market, gardening and lawn care's continued popularity as a hobby in the US, Canada, Australia, and Western Europe will drive growth. Food

gardening in particular is widely enjoyed in these regions. In developing regions, rising personal incomes, an expanding middle class, and urbanization trends will support growth. Urban residents are more likely to have the funds to participate in gardening activities, although many lack the space for lawns or large gardens; as a result, container gardens are becoming more popular, promoting demand for growing media, seeds, and easy-to-use fertilizers and pesticides. However, gains in the consumer market will be hindered in countries that do not have cultures that highly value lawns or that have very arid climates. Environmental regulations will also restrain growth in consumer demand for lawn and garden consumables.

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Sample Text, Table & Chart

ASIA/PACIFIC

Australia: Demand by Product

Demand for lawn and garden consumables in Australia is expected to rise to 1.2 billion in 2019. Demand is driven by population growth, capital expenditures and the already existing demand for lawn and garden consumables. Challenges will be offshoring and the introduction of environmentally friendly products. In addition, the demand for lawn and garden consumables will be buffered by the installation of lawn and garden consumables to buffer a home from the effects of climate change.

SAMPLE
TEXT

Consumables demand in Australia has long been impacted by drought restrictions throughout various parts of the country due to drought conditions. In South Australia, for example, sprinklers and watering systems are banned for home use. However, the greater demand for products designed for use in drought-like conditions will stimulate demand for lawn and garden consumables. These products can be used to conserve water. For example, wetting agents can be used to help water penetrate the soil more efficiently, and mulch is a popular way to reduce the amount of evaporation from soil. Soil conditioners also provide benefits, as well-conditioned soil absorbs water better. In some areas of the country, mulch is also gaining use as a water retention agent. In bushfire zones, however, mulch is not recommended.

The Australian lawn and garden consumables market is dominated by DuluxGroup and Scotts Miracle-Gro. DuluxGroup offers lawn and garden consumables through its Yates subsidiary. In addition to its own product lines, Yates markets a range of lawn and garden insecticides from Bayer. Yates also markets controlled-release fertilizers through Agri (a joint venture between JNC, Asahi Kasei, and Mitsubishi Chemical's Mitsubishi Chemical Agri subsidiary). Scotts Miracle-Gro offers a variety of lawn and garden consumables to the Australian market. In addition to marketing its own products, Scotts Miracle-Gro also markets products from other manufacturers.

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TABLE VI-3

AUSTRALIA: LAWN & GARDEN CONSUMABLES DEMAND BY MARKET (million US dollars)

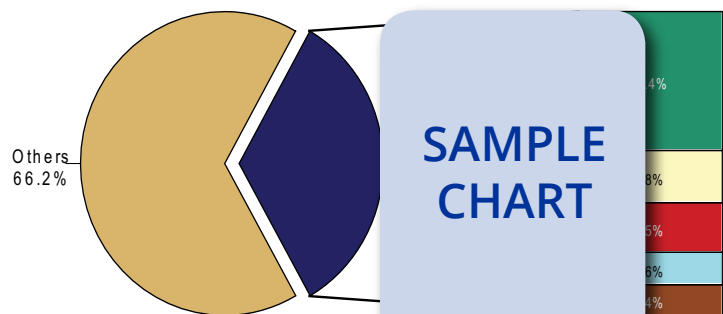
Item	2004	2009	2014	2019	2024
Gross Domestic Product (bil 2013 US\$)					
Building Constr Expend (bil 2013 US\$)					
Households (million persons per household)					
Population (million persons)					
Urban					
Nonurban					
\$ consumables/capita					
Lawn & Garden Consumables Demand					
Professional					
Consumer					
% Australia					
Asia/Pacific Lawn & Garden Consumables					

SAMPLE
TABLE

Source: The Freedonia Group, Inc.

CHART VIII-1

WORLD LAWN & GARDEN CONSUMABLES MARKET SHARE, 2014 (\$16.3 billion)



SAMPLE
CHART

Sample Profile & Table, & Study Coverage

TABLE III-10

WORLD LAWN & GARDEN CONSUMABLES DEMAND BY REGION
(million dollars)

Item	2004	2009	2014	2019	2024
Population (million persons)					
\$ consumables/capita					
Lawn & Garden Consumables Demand					
North America:					
United States					
Canada & Mexico					
Western Europe					
Asia/Pacific:					
Australia					
China					
Other Asia/Pacific					
Other Regions					

Source: The Freedonia Group, Inc.

COMPANY PROFILES

JCAM Agri Company Limited

6-6 Kandasudacho, 2-chome
 Chiyoda-ku, Tokyo
 Japan
 813-5297-8900
<http://www.jcam-agri.com>

Annual Sales:
 Employment:

Key Products: other fertilizers

JCAM Agri is a joint venture that manufactures and markets controlled-release and other fertilizers primarily for agricultural, turf, ornamental, and horticultural applications. The Company is 42.25-percent owned by JNC Corporation (Japan), 22.75-percent owned by Asahi Kasei Corporation (Japan), and 35-percent owned by Mitsubishi Chemical Corporation (Japan).

The Company is active in the world lawn and garden consumables industry via the manufacture and sale of controlled-release, slow-release, and other fertilizers that can be used in a variety of landscaping, turf, nursery, horticultural, ornamental, and other applications. Controlled-release fertilizers from JCAM Agri include NUTRICOTE and MEISTER nitrogen-phosphorous-potassium types, which feature a polymer coating and contain such additional nutrients as calcium, magnesium, sulfur, and urea. Furthermore, these fertilizers can be formulated with various release patterns to fit specific applications. The Company's NUTRICOTE and MEISTER fertilizers are primarily engineered for use with rice, wheat, maize, and other crops; however, these products are also suitable for fruit, vegetable, ornamental, and turf applications.

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283

SAMPLE PROFILE

SAMPLE TABLE

STUDY COVERAGE

This Freedonia study, *World Lawn & Garden Consumables*, presents historical demand data (2004, 2009, 2014) plus forecasts (2019, 2024) by type and market in six regions and 16 countries. The study also considers market environment factors, details the industry structure, evaluates company market share and profiles 24 global industry players.

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Related Studies

Landscaping Products

This study analyzes the US landscaping products industry. It presents historical demand data (2004, 2009 and 2014) and forecasts (2019 and 2024) by product (e.g., decorative products, hardscape products, outdoor structures), market (residential, nonresidential, nonbuilding), end user (professional, consumer/DIY), and US region. The study also considers market environment factors, details industry structure, evaluates company market share, and profiles industry players.

#3279.....*May 2015*.....\$5300

Lawn & Garden Consumables

US demand for packaged lawn and garden consumables will rise 3.4 percent annually to \$9.0 billion in 2018. Fertilizer will remain the largest type while growing media and seeds will increase the fastest. Organic formulations will outpace the dominant conventional segment, albeit from a small base. This study analyzes the \$7.6 billion US lawn and garden consumables industry, with forecasts for 2018 and 2023 by product, formulation, market, application, end user and US region. The study also evaluates company market shares and profiles industry players.

#3183.....*July 2014*.....\$5300

Bricks, Blocks & Pavers

Demand for bricks, blocks and pavers in the US is forecast to rise 8.8 percent per annum from a low 2013 base to \$8.9 billion in 2018. Bricks, typically made of clay, will see the most rapid growth of any product, driven by a rebound in new housing construction. Pavers will be the second fastest growing type, driven in part by interest in "green" building materials such as permeable pavers. This study analyzes the \$5.8 billion US brick, block and paver industry, with forecasts for 2018 and 2023 by product, material, market, application and US region. The study also evaluates company market share and profiles industry players.

#3236.....*November 2014*.....\$5200

World Construction Aggregates

World sales of construction aggregates will rise 5.8 percent annually to 53.2 billion metric tons in 2017. The Asia/Pacific region will remain the dominant market and grow the fastest. Crushed stone and other aggregates will offer the best prospects. Hydraulic cement will continue to be a key application. This study analyzes the 40.2 billion metric ton world construction aggregates industry, with forecasts for 2017 and 2022 by type, market, application, world region, and for 28 countries. The study also evaluates company market share and profiles industry players.

#3078.....*December 2013*.....\$6100

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

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 and other world markets. Industries analyzed by Freedonia include:

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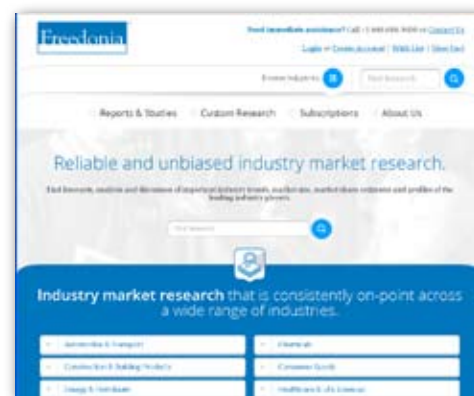
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