World Lawn & Garden Consumables

Industry Study with Forecasts for 2019 & 2024

Study #3265 | March 2015 | $6200 | 344 pages
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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 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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Asia/Pacific

Australia: Demand by Product

Demand for lawn and garden consumables in Australia is forecast to rise from US$350 million in 2014 to US$545 million in 2019. Decelerating growth in building construction expenditures and the already high per capita use rates in Australia will limit growth in demand for this category. However, challenges will be offset by the introduction of higher-value, more environmentally friendly products. In addition, demand can be increased by installing lawn and flower beds to buffer a home from the bushland.

Consumables demand in Australia has long been impacted by water restrictions throughout various parts of the country due to drought-like conditions. In South Australia, for example, sprinklers and other watering systems are banned for home use. However, the greater availability of products designed for use in drought-like conditions will support sales of lawn and garden consumables. These products can be used to promote water conservation. For example, wetting agents can be used to help water penetrate the soil more efficiently, and mulch is a popular method 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 products from Bayer. Yates also markets controlled-release fertilizers from JCAM Agri (a joint venture between JNC, Asahi Kasei, and Mitsubishi Chemical’s Mitsubishi Chemical Agri subsidiary). Scotts Miracle-Gro markets a variety of lawn and garden consumables to the Australian market. In addition to marketing its own products, Scotts Miracle-Gro also

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<thead>
<tr>
<th>Item</th>
<th>2004</th>
<th>2009</th>
<th>2014</th>
<th>2019</th>
<th>2024</th>
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<td>918</td>
<td>1050</td>
<td>1205</td>
<td>1375</td>
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<tr>
<td>Building Constr Expend (bil 2013 US$)</td>
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<td>78.2</td>
<td>91.9</td>
<td>102.0</td>
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<td>Households (million)</td>
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<td>8.8</td>
<td>9.6</td>
<td>10.4</td>
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<td>persons per household</td>
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<td>2.5</td>
<td>2.4</td>
<td>2.4</td>
<td>2.3</td>
</tr>
<tr>
<td>Population (million persons)</td>
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<td>23.2</td>
<td>24.6</td>
<td>25.9</td>
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<td>19.1</td>
<td>20.7</td>
<td>22.1</td>
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<tr>
<td>Nonurban</td>
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<td>2.5</td>
<td>2.5</td>
<td>2.5</td>
<td>2.4</td>
</tr>
<tr>
<td>$ consumables/capita</td>
<td>17.4</td>
<td>19.0</td>
<td>20.3</td>
<td>22.2</td>
<td>24.3</td>
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<tr>
<td>Lawn &amp; Garden Consumables Demand Professional</td>
<td>190</td>
<td>225</td>
<td>260</td>
<td>300</td>
<td>345</td>
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<tr>
<td>Consumer</td>
<td>160</td>
<td>185</td>
<td>210</td>
<td>245</td>
<td>285</td>
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<td>% Australia</td>
<td>23.9</td>
<td>22.2</td>
<td>18.6</td>
<td>15.7</td>
<td>13.6</td>
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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.co.jp

Annual Sales:
Employment:

Key Products:
controlled-release, slow-release, and 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.

TABLE III-10

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

<table>
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<tr>
<th>Item</th>
<th>2004</th>
<th>2009</th>
<th>2014</th>
<th>2019</th>
<th>2024</th>
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<td>Population (million persons)</td>
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<td>Lawn &amp; Garden Consumables Demand</td>
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<td>North America:</td>
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<td>United States</td>
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<td>Western Europe</td>
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<td>Other Asia/Pacific</td>
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<td>Other Regions</td>
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Source: The Freedonia Group, Inc.

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, landscape 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 $300

**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 $300

**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 $9.9 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 $200

**World Construction Aggregates**
World sales of construction aggregates will rise 5.8 percent annually to 63.2 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 $100

**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 $300

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