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Landscaping Products

US Industry Study with Forecasts for **2019 & 2024**

Study #3300 | August 2015 | \$5300 | 273 pages

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1 US Landscaping Products Market Share, 2014 180

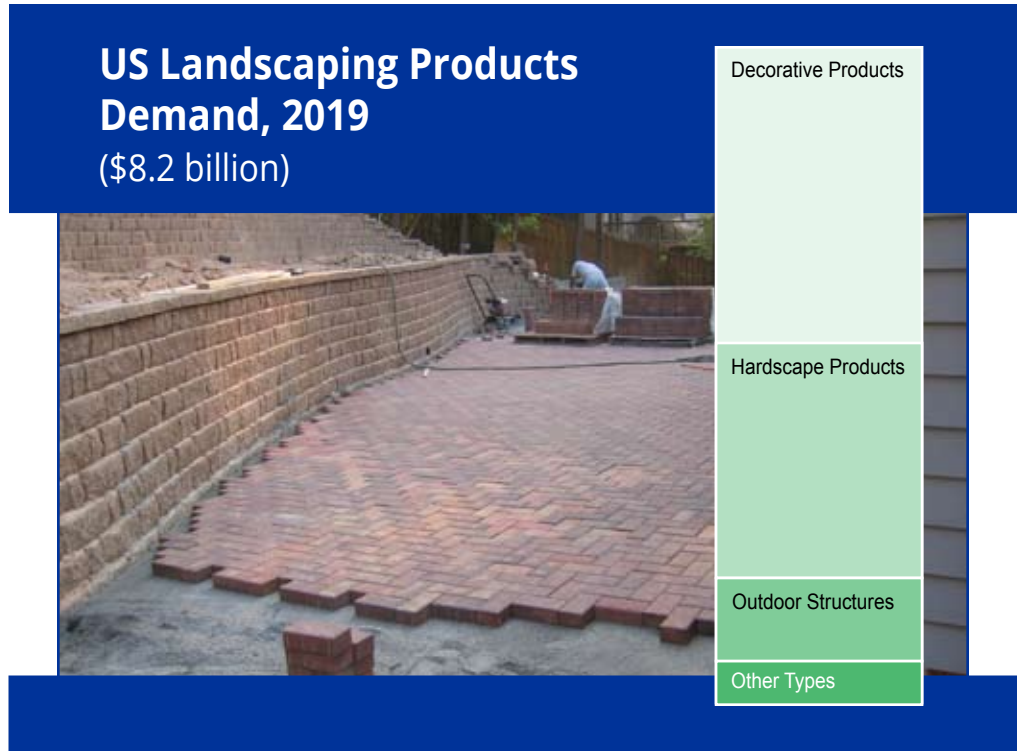
Gains will be supported by strong growth in residential and nonresidential construction, advances in existing home sales, increases in disposable incomes, and growing environmental concerns of consumers.

US demand to rise 5.3% annually through 2019

Demand for landscaping products in the United States is forecast to grow 5.3 percent per year to \$8.2 billion in 2019 as the market continues to recover from the effects of the 2007-2009 recession. Strong gains in the residential and nonresidential construction sectors, growth in existing home sales, and increases in disposable incomes will support gains. Additionally, demand will be influenced by long-term drought experienced in areas of the West and the South, and growing environmental concerns of consumers.

Outdoor living trend to drive market growth

The residential market is by far the largest of the three major markets for landscaping products. The popularity of outdoor living spaces such as outdoor kitchens and living rooms will continue to grow as homeowners look to increase their usable living space. Such living spaces will drive demand for landscaping products, including concrete pavers for patios and flooring, bricks and stones for walls and seating areas, and trellises and pergolas for cover. Purchases of outdoor heating elements, including outdoor fireplaces, fire pits, and chimineas, will also increase as homeowners seek to utilize these living spaces for more time during the year. After putting off nonessential purchases during the recession, many homeowners want to increase the "curb appeal" of



their homes, which will drive demand for landscaping lighting and decorative products such as pots and planters, garden statuary, and water features.

The outdoor living trend will also influence demand in the nonresidential market as businesses such as restaurants, coffee shops, and bars move to increase their seating space during the temperate months by adding outdoor seating areas, supporting growth in hardscaping products such as pavers and stone. Sales of outdoor heating products like fireplaces and fire pits, as well as landscaping lighting, will also increase as businesses try to maximize the time that outdoor seating can be used. Nonbuilding applications will also show healthy growth, in part due to

municipal efforts to mitigate the effects of water runoff by increasing the use of permeable pavers. However, the ongoing closing of golf courses, particularly in the Midwest, will restrain growth.

Water restrictions to favor hardscaping, synthetic turf

Continued drought conditions across large portions of the US have led many municipalities to institute stringent water usage restrictions. These restrictions, as well as a wider awareness of water usage among consumers in general, will drive demand for water-conscious landscaping choices such as hardscaping and synthetic turf.

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Sample Text, Table & Chart

MARKETS

Professional

Professional users of landscaping products typically include landscaping establishments, golf courses, and grounds maintenance government and other professional services. The market for landscaping products from professional users is expected to grow through 2019 to \$1.5 billion. Completions will drive demand, and the market includes the installation of professional services. The market includes office building construction and professional installation of landscaping products. In addition, as the market improves, residential and nonresidential customers will have more time available to devote to property maintenance and improvement. In general, the largest share of products that are relatively difficult to install (e.g., gazebos, ready mix concrete, pergolas, and sheds) is in the existing homes market.

Golf courses and related golfing facilities (e.g., driving ranges) are significant users of professional landscaping product installation due to the large amount of landscaped and highly maintained terrain they occupy. However, a decline in the number of golf courses in the US has hurt demand in this segment, and will continue to do so as more golf courses close than open through 2019. Municipal courses may offer the best opportunities for growth through the forecast period, as they are expected to maintain the same number of courses through 2019, while the number of daily fee and private courses is expected to decline. This is partly due to the fact that public courses are often less costly to maintain, which has helped these courses attract more players when budgets get tight. Courses in the Northeast and South are projected to register the slowest declines, with the South driven by its winter vacationers, and "snowbird" population, and the Northeast by the presence of relatively affordable courses. Golf courses in the West

148

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SAMPLE
TEXT

TABLE IV-2

RESIDENTIAL MARKETS FOR LANDSCAPING PRODUCTS
(million dollars)

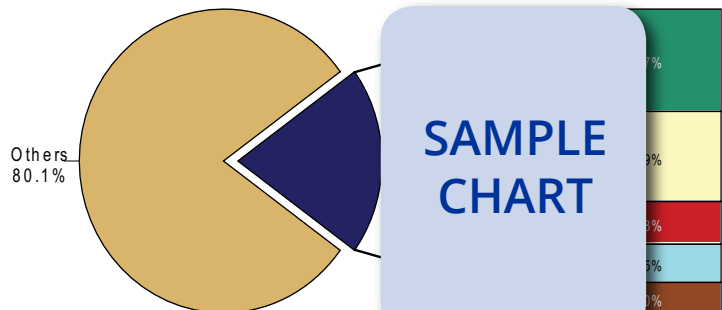
Item	2004	2009	2014	2019	2024
Residential Constr Expend (bil \$)					
\$ landscaping products/000\$ construction					
Residential Landscaping Products					
By Type:					
Decorative Products					
Hardscape Products					
Outdoor Structures					
Other					
By Application:					
New					
Improvement & Repair					
% residential					
Landscaping Products Demand					

SAMPLE
TABLE

Source: The Freedonia Group, Inc.

CHART VI-1

US LANDSCAPING PRODUCTS MARKET SHARE, 2014
(\$6.3 billion)



SAMPLE
CHART

Sample Profile & Table, & Study Coverage

TABLE III-8
HARDSCAPE PRODUCTS DEMAND
 (million dollars)

Item	2004	2009	2014	2019	2024
Resident Population (million)					
\$ hardscape products/capita					
Hardscape Products Demand					
Concrete					
Wood					
Stones & Boulders					
Clay Brick					
Aggregates & Other					
% hardscape products					
Landscaping Products Demand					

Source: The Freedonia Group, Inc.



COMPANY PROFILES

Astroturf LLC
 2680 Abutment Road
 Dalton, GA 30705
 706-277-1012
<http://www.astroturf.com>

Annual Sales:
 Employment:

Key Products

SAMPLE PROFILE

Astroturf is a manufacturer of synthetic turf and grass products for commercial and residential end uses. The Company is owned by Textile Management Associates Incorporated (Dalton, Georgia), a private holding company.

The Company competes in the US landscaping products industry through the SYNlawn division (Dalton, Georgia), which manufactures fully recyclable synthetic grass landscaping systems. These grass systems are used in applications such as residential and commercial lawns and landscaping, golf greens, pet areas, play areas, roof decks, and patios. For landscaping purposes, the division produces SYNBERMUDA, SYNFESCUE, SYNRYE, SYNTIPEDE, and SYNZOYSIA collections of artificial landscaping grass. Synthetic grass systems are available with exclusive technologies from SYNlawn, which include HEATBLOCK and ENVIROLOC. HEATBLOCK reduces heat build-up and thermal emissivity. The ENVIROLOC backing system features an enhanced multilayer component system that locks in turf fibers, maximizing product life. ENVIROLOC systems include use of BIOCEL renewable resource-based polyurethane backing systems from Universal Textile Technologies Incorporated (Dalton, Georgia). BIOCEL backings consist of Universal Textile Technologies' CELCERAM,

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STUDY COVERAGE

This Freedonia industry study, *Landscaping Products*, presents historical demand data (2004, 2009, 2014) and forecasts (2019, 2024) by product, market, and US region. The study also details key market environment factors, assesses the industry structure, analyzes company market share and profiles 35 competitors in the US industry.

Related Studies

Outdoor Furniture & Grills

This study analyzes the US outdoor furniture and grill industry. It presents historical demand data (2004, 2009 and 2014) and forecasts (2019 and 2024) by product (e.g., outdoor furniture, cushions and covers, umbrellas and hammocks, grills, patio heating products), market (e.g., single-family housing, multifamily housing, manufactured housing, nonresidential) and US geographic region. The study also considers market environment factors, details industry structure, evaluates company market share and profiles industry players.

#3344..... October 2015.....\$5300

Power Lawn & Garden Equipment

This study analyzes the US power lawn and garden equipment industry. It presents historical demand data (2004, 2009 and 2014) and forecasts (2019 and 2024) by material, product (e.g., lawnmowers; turf and grounds equipment; trimmers and edgers; garden tractors and rotary tillers; blowers, vacuums and sweepers; snow throwers; hedge trimmers), market (e.g., residential, landscaping, golf courses, government), and US region. The study also considers market environment factors, evaluates company market share and profiles industry competitors.

#3318..... October 2015.....\$5300

Home Organization Products

Demand for home organization products in the US is forecast to increase 3.5 percent per year through 2019 to \$10.5 billion. Bins, baskets and totes will remain the largest product segment, while modular units will grow the fastest. Garages will be the fastest growing room in which organization products are used. This study analyzes the \$8.8 billion US home organization product industry, with forecasts for 2019 and 2024 by material, product, room and market. The study also evaluates company market share, and profiles industry competitors.

#3254..... May 2015.....\$5300

World Lawn & Garden Consumables

World demand for lawn and garden consumables will rise 3.7 percent annually to \$19.5 billion in 2019. North America will remain the dominant market, while the Asia/Pacific region will grow the fastest. Seeds and growing media will be the fastest growing segments, while fertilizers and pesticides remain the largest. This study analyzes the \$16.3 billion world lawn and garden consumables industry, with forecasts for 2019 and 2024 by product, market, world region, and for 16 major countries. The study also evaluates company market share and profiles industry participants.

#3265..... March 2015.....\$6200

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

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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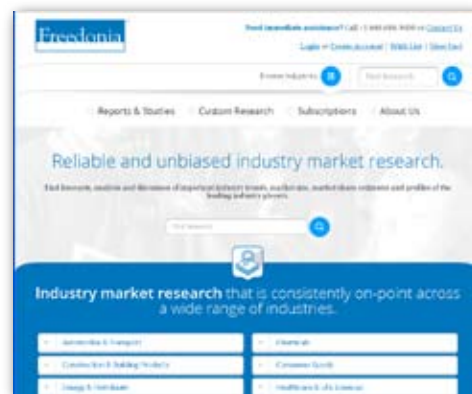
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