



**CLICK TO VIEW**

Table of Contents **2**

List of Tables &  
Charts **3**

Study Overview **4**

Sample Text, Table  
& Chart **5**

Sample Profile, Table &  
Study Coverage **6**

Order Form & Corporate  
Use License **7**

About Freedonia,  
Custom Research,  
Related Studies **8**

# Power Lawn & Garden Equipment

---

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

---

Study #3340 | December 2015 | \$5300 | 341 pages

---

[www.freedoniagroup.com](http://www.freedoniagroup.com)



**The Freedonia Group**

767 Beta Drive

Cleveland, OH • 44143-2326 • USA

Toll Free US Tel: 800.927.5900 or

+1 440.684.9600

Fax: +1 440.646.0484

Email: [info@freedoniagroup.com](mailto:info@freedoniagroup.com)

# Table of Contents

## EXECUTIVE SUMMARY

## MARKET ENVIRONMENT

- General.....4
- Macroeconomic Outlook .....5
- Personal Income & Spending Trends.....9
- Demographic Trends.....12
- Housing Outlook.....16
  - Household Formation & Housing Stock Patterns.....17
  - Housing Completions.....20
- Pricing Patterns.....23
- Historical Market Trends.....26
- Environmental & Regulatory Issues.....29
  - Air Emissions.....30
  - Fuel Sources.....31
  - Noise Pollution.....32
  - Yard Waste.....33
- Power Lawn & Garden Equipment Technology ...33
- World Power Lawn & Garden Equipment Demand .....35
- US Foreign Trade.....37
  - Exports.....38
  - Imports.....41

## MARKETS

- General.....45
- Residential .....47
- Commercial .....51
  - Landscaping Establishments.....54
    - Landscaping Services Outlook.....55
    - Power Lawn/Garden Equipment Demand...58
  - Golf Courses.....60
    - Golf Course Outlook.....61
    - Power Lawn/Garden Equipment Demand...63
- Government & Other .....65
  - Government Spending Outlook .....66
  - Power Lawn/Garden Equipment Demand...67

## PRODUCTS

- General.....70
- Lawnmowers .....74
  - Riding .....78
    - Front-Engine .....80
    - Rear-Engine.....82

- Walk Behind .....84
  - Self-Propelled .....87
  - Push .....87
  - Robotic .....88
- Foreign Trade.....89
- Turf & Grounds Equipment .....92
  - Mowers .....95
    - Riding .....97
    - Walk Behind.....100
    - Other.....102
  - Turf Tractors & Related Equipment .....103
  - Other Turf Care Equipment.....105
- Foreign Trade.....107
- Trimmers & Edgers.....109
  - Wire Blade .....111
  - Fixed Blade .....113
- Garden Tractors & Rotary Tillers.....114
  - Garden Tractors.....116
  - Rotary Tillers .....118
- Chainsaws.....120
- Blowers, Vacuums, & Sweepers.....122
- Snow Throwers .....125
  - Dual-Stage .....129
  - Single-Stage.....131
  - Foreign Trade.....133
- Hedge Trimmers & Other .....134
- Parts & Attachments.....137
- Power Source .....140
  - Internal Combustion Engine .....143
  - Electric.....145

## REGIONAL TRENDS

- General.....149
  - Regional Demographic & Economic Trends...149
  - Regional Population Outlook.....150
  - Regional Economic Outlook.....153
  - Regional Housing Trends.....155
- Power Lawn & Garden Equipment Demand by Region .....158
  - Northeast.....162
  - Midwest .....164
  - South.....167
  - West .....170

## INDUSTRY STRUCTURE

- General.....175
- Industry Composition.....176
- Market Share.....179
- Competitive Strategies .....183

- Research & Product Development .....187
- Manufacturing.....188
- Marketing.....191
- Distribution.....194
  - Residential Distribution Channels.....195
    - Home Centers.....196
    - Mass Merchandisers.....197
    - Hardware & Other .....198
  - Commercial Distribution Channels.....199
- Cooperative Agreements.....200
- Mergers & Acquisitions .....205

## COMPANY PROFILES

- Alamo Group .....210
- Ariens Company.....219
- Bad Boy Mowers .....223
- Blount International .....225
- Briggs & Stratton.....230
- Certified Parts.....238
- Dana Holding.....240
- Deere & Company.....241
- Excel Industries .....247
- Fuji Heavy Industries .....250
- Generac Holdings .....252
- Global Garden Products.....255
- Home Depot.....257
- Honda Motor.....259
- Husqvarna AB.....263
- Kawasaki Heavy Industries .....271
- Kohler Company .....273
- Kubota Corporation.....276
- Lowe's Companies .....280
- Makita Corporation.....282
- McLane Manufacturing .....284
- Metalcraft of Mayville .....285
- Mordge Manufacturing .....288
- MTD Products.....290
- Schiller Grounds Care.....297
- Sears Holdings.....302
- Snow Joe.....304
- Stanley Black & Decker.....306
- STIHL Holding.....309
- Swisher Mower & Machine .....313
- Techtronic Industries.....315
- Textron Incorporated.....318
- Toro Company.....322
- Walker Manufacturing.....332
- Wal-Mart Stores .....334
- Yamabiko Corporation .....336

## List of Tables/Charts

### EXECUTIVE SUMMARY

1 Summary Table .....3

### MARKET ENVIRONMENT

1 Macroeconomic Indicators .....8  
 2 Personal Consumption Expenditures.....12  
 3 Population & Households .....16  
 4 Housing Stock by Type .....19  
 Cht Year of Construction of  
     Housing Stock, 2014.....20  
 5 Housing Completions .....23  
 6 Power Lawn & Garden Equipment Pricing...25  
 7 Power Lawn & Garden Equipment  
     Market, 2004-2014.....28  
 Cht Power Lawn & Garden Equipment  
     Market, 2004-2014.....29  
 8 Power Lawn & Garden Equipment  
     Foreign Trade .....38  
 9 Power Lawn & Garden Equipment Exports  
     by Destination, 2004-2014.....40  
 Cht Power Lawn & Garden Equipment  
     Exports by Destination, 2014 .....41  
 10 Power Lawn & Garden Equipment  
     Imports by Source, 2004-2014.....44  
 Cht Power Lawn & Garden Equipment  
     Imports by Source, 2014.....44

### MARKETS

1 Power Lawn & Garden Equipment Markets 46  
 Cht Power Lawn & Garden Equipment  
     Demand by Market, 2004-2014 .....47  
 2 Residential Market: Power Lawn &  
     Garden Equipment Demand .....50  
 Cht Residential Power Lawn & Garden  
     Equipment Demand, 2004-2014.....51  
 3 Commercial Market: Power Lawn  
     & Garden Equipment Demand .....53  
 Cht Commercial Market for Power Lawn  
     & Garden Equipment by  
     Segment, 2004-2014.....54  
 4 Landscaping Services Revenue  
     & Establishments.....58  
 5 Landscaping Establishments Market: Power  
     Lawn & Garden Equipment Demand.....59

Cht Landscaping Market for Power Lawn &  
     Garden Equipment Demand, 2004-2014.60  
 6 Golf Course Outlook .....62  
 7 Golf Course Market: Power Lawn  
     & Garden Equipment Demand .....65  
 8 Government Expenditures & Investments ..67  
 9 Government & Other Market: Power Lawn  
     & Garden Equipment Demand .....69

### PRODUCTS

1 Power Lawn & Garden Equipment  
     Supply & Demand.....73  
 Cht Power Lawn & Garden Equipment  
     Demand by Product, 2014.....74  
 2 Lawnmower Supply & Demand.....77  
 Cht Lawnmower Demand by Type, 2004-2014 ..78  
 3 Riding Mower Supply & Demand .....80  
 4 Front-Engine Riding Mower  
     Supply & Demand.....82  
 5 Rear-Engine Riding Mower  
     Supply & Demand.....84  
 6 Walk Behind Lawnmower  
     Supply & Demand.....86  
 7 Lawnmower Foreign Trade.....92  
 8 Turf & Grounds Equipment  
     Supply & Demand.....95  
 9 Turf & Grounds Mower Supply & Demand..96  
 10 Riding Turf & Grounds Mower  
     Supply & Demand.....98  
 11 Walk Behind Turf & Grounds Mower  
     Supply & Demand.....102  
 12 Other Turf & Grounds Mowing Equipment  
     Supply & Demand.....103  
 13 Turf Tractor & Related Equipment  
     Supply & Demand.....105  
 14 Other Turf Care Equipment  
     Supply & Demand.....107  
 15 Turf & Grounds Equipment  
     Foreign Trade.....109  
 16 Trimmer & Edger Supply & Demand .....111  
 17 Wire Blade Trimmer & Edger  
     Supply & Demand.....113  
 18 Fixed Blade Trimmer & Edger  
     Supply & Demand.....114  
 19 Garden Tractor & Rotary Tiller  
     Supply & Demand.....116  
 20 Garden Tractor Supply & Demand .....118

21 Rotary Tiller Supply & Demand .....120  
 22 Chainsaw Supply & Demand .....122  
 23 Blower, Vacuum, & Sweeper Demand.....125  
 24 Snow Thrower Supply & Demand.....129  
 25 Dual-Stage Snow Thrower  
     Supply & Demand.....131  
 26 Single-Stage Snow Thrower  
     Supply & Demand.....132  
 27 Snow Thrower Foreign Trade .....134  
 28 Hedge Trimmer & Other Power Lawn &  
     Garden Equipment Supply & Demand...137  
 29 Power Lawn & Garden Equipment Parts  
     & Attachments Supply & Demand.....140  
 30 Lawn & Garden Equipment  
     Demand by Power Source.....143  
 31 Internal Combustion Engine Lawn  
     & Garden Equipment Demand .....145  
 32 Electric Lawn & Garden  
     Equipment Demand .....148

### REGIONAL TRENDS

1 Population by Region.....152  
 2 Gross Domestic Product by Region .....155  
 3 Regional Housing Indicators.....158  
 4 Power Lawn & Garden Equipment  
     Demand by Region .....160  
 Cht Regional Share of Power Lawn & Garden  
     Equipment Demand, 2014.....161  
 5 Northeast: Power Lawn & Garden  
     Equipment Demand .....164  
 6 Midwest: Power Lawn & Garden  
     Equipment Demand .....167  
 7 South: Power Lawn & Garden  
     Equipment Demand .....170  
 8 West: Power Lawn & Garden  
     Equipment Demand .....174

### INDUSTRY STRUCTURE

1 US Power Lawn & Garden Equipment  
     Sales by Company, 2014.....178  
 Cht Power Lawn & Garden Equipment  
     Market Share, 2014 .....180  
 Cht Power Lawn & Garden Equipment Sales  
     by Distribution Channel, 2014 .....195  
 2 Selected Cooperative Agreements.....204  
 3 Selected Acquisitions & Divestitures .....208

*Growth in the single-family housing stock and the number of landscaping firms, coupled with technological innovations to battery-powered products and robotic lawnmowers, will fuel US demand for these products.*

## US demand to grow 3.2% per annum through 2019

US demand for power lawn and garden equipment is expected to rise 3.2 percent per year to \$11.7 billion in 2019. Growth is forecast to slow somewhat compared to the gains seen over the 2009-2014 period, when the more rapid advances reflected the beginning of a recovery from a sharply reduced 2009 base. Through 2019, gains will be supported by accelerating growth in the single-family housing stock and the number of landscaping establishments, which will result in increased demand for both consumer and commercial grade equipment. Sales will also benefit from ongoing technological innovations, including improvements to battery-powered products that allow for longer run times and faster recharging.

Sales of power lawn and garden equipment rebounded in all US regions during the 2009-2014 period from a low 2009 base, though demand in the West was restrained by drought conditions, which resulted in below average gains. The South accounts for the largest share of demand, with 38 percent of total sales in 2014. The region benefits from a generally warm climate and rapid growth in population and housing stock.

## Turf & grounds equipment to post strong advances

Sales of consumer grade lawnmowers will benefit from the expansion in the housing stock, supporting demand for both new and replacement lawnmowers. Value gains will be boosted by growing consumer interest in higher-end models, such as riding mowers, electric types,



and those that feature self-propulsion. Although robotic lawnmowers are expected to remain a niche product in the residential market through the forecast period, sales will triple through 2019 as the number of product offerings grows and prices begin to come down. Turf and grounds equipment (e.g., commercial mowers, turf tractors, and other turf care products) will post some of the fastest gains as the number of landscaping establishments continues to climb and existing firms expand their fleets. Lawnmowers and turf and grounds equipment, the two largest product segments, will combine to account for over half of value gains through 2019. Smaller segments such as hedge trimmers, blowers, sweepers and vacuums are also forecast to register above average growth as landscaping establishments expand and

replace equipment and as commercial users become more confident in higher value, battery-powered models.

## Commercial market gains to outpace residential

The residential market accounts for the majority of power lawn and garden equipment sales. Gains will mainly stem from expansion of the market as the housing stock increases. Additionally, an ongoing focus on outdoor spaces will continue to aid demand for a variety of power lawn and garden equipment. Gains in the commercial market are expected to outpace those in the residential market, driven by accelerating growth in the number of landscaping establishments as more homes and businesses outsource these services.

Copyright 2015 The Freedonia Group, Inc.

[Click here to purchase online](#)

## Sample Text, Table & Chart

### REGIONAL TRENDS

#### Northeast

The Northeast region consists of two subregions: New England and the Middle Atlantic. Historically, the region's economy was manufacturing. Through the latter half of the 20th century and the early years of the new millennium, manufacturing activity declined in importance, as many producers relocated to areas with lower costs (either the South or overseas). As a result, economic growth in the Northeast lagged that in the South and West.

In recent years, GDP growth in the Northeast has begun to catch up to that in the Sunbelt regions. Industries that have sprung up to replace manufacturing's place include high technology and financial services. Production has become important in the Middle Atlantic (especially in Pennsylvania). Because of the shifting focus on these newer industries as well as some revival in manufacturing activity (due in part to tax incentives), the region's economy is forecast to grow more strongly through 2019. Nevertheless, population growth is significantly slower than that in the Sunbelt, a long-term trend.

Power lawn and garden equipment in the Northeast is expected to grow at an average of 1.5 percent annually through 2019 to 2024. The Northeast will see some of the slowest regional growth, lagging behind the Sunbelt, South, and West and matching that in the Midwest. Gains in both new housing sales and population growth are projected to be below the national average, which will limit the Northeast's overall potential market and restrain faster growth in equipment sales. Nonetheless, sales will be supported by accelerating growth in the region's single-family housing stock and economy, promoting sales of new equipment.

Much like the Midwest, the Northeast's share of the total power lawn and garden equipment market has remained essentially

162

Copyright 2015

TABLE III-3

**COMMERCIAL MARKET:  
POWER LAWN & GARDEN EQUIPMENT DEMAND  
(million dollars)**

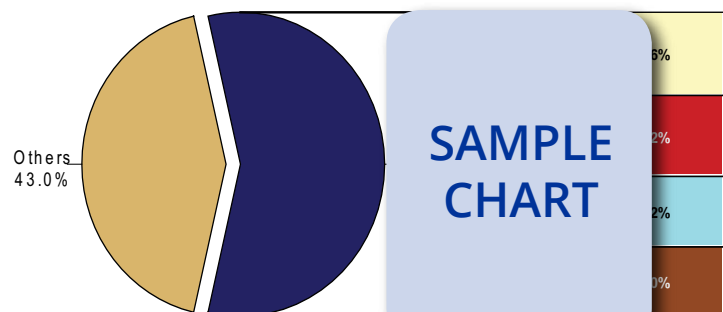
Item	2004	2009	2014	2019	2024
Gross Domestic Product (bil \$)	17,000	19,000	21,000	23,000	25,000
\$ equipment/mil \$ GDP	0.000006	0.000006	0.000006	0.000006	0.000006
Commercial Power L&G Equip Demand					
By Product:					
Lawnmowers					
Turf & Grounds Equipment					
Trimmers & Edgers					
Garden Tractors & Rotary Tillers					
Snow Throwers					
Blowers, Vacuums, & Sweepers					
Chainsaws					
Hedge Trimmers & Other					
Parts & Attachments					
By Segment:					
Landscaping Establishments					
Golf Courses					
Government & Other					
% commercial					
Power Lawn & Garden Equipment Demand					

**SAMPLE  
TABLE**

Source: The Freedonia Group, Inc.

CHART VI-1

**POWER LAWN & GARDEN EQUIPMENT MARKET SHARE, 2014  
(\$10.0 billion)**



**SAMPLE  
CHART**

## Sample Profile & Table, & Study Coverage

**TABLE IV-10**  
**RIDING TURF & GROUNDS MOWER SUPPLY & DEMAND**  
 (million dollars)

Item	2004	2009	2014	2019	2024
Turf & Grounds Mower Demand (000 units)					
% riding mowers					
Riding T&G Mower Demand (000 units)					
\$/unit					
Riding Turf & Grounds Mower Demand					
Rotary					
Reel (including Greens)					
+ net exports					
Riding Turf & Grounds Mower Shipments					

Source: The Freedonia Group, Inc.

SAMPLE  
TABLE

### COMPANY PROFILES

#### Ariens Company

655 West Ryan  
 Brillion, WI  
 920-756-214  
 www.ariens.com

Annual Sales  
 Employment

Key Products: riding mowers, tillers, edgers, string trimmers, log splitters, vacuums and sweepers, blowers, sprayers, aerators and related replacement parts

SAMPLE  
PROFILE

Ariens Company is a manufacturer of lawn and garden products, including walk behind and riding mowers and snow throwers for both the residential and commercial markets. Ariens is privately held.

The Company competes in the US lawn and garden equipment industry through the manufacture and sale of such outdoor power equipment products as riding and walk behind mowers, snow throwers, tillers, edgers, string trimmers, log splitters, vacuums and sweepers, blowers, sprayers, aerators and related replacement parts. Ariens sells its products under such brand names as ARIENS, PARKER, STENS, GRAVELY, and SNO-TEK.

**ARIENS Products** -- Products manufactured and sold under the Company's ARIENS brand name include riding and walk behind mowers, lawn and garden tractors, snow throwers, tillers, edgers, string trimmers, power brushes, and log splitters. ARIENS riding mowers are available in zero-turn-radius models that feature 14.5- to 22-horsepower (hp) engines from Kohler Company (Kohler, Wisconsin) or from Kawasaki Heavy Industries Limited (Japan) and cutting widths

STUDY  
COVERAGE

*Power Lawn & Garden Equipment* is a Freedonia study that offers historical demand data (2004, 2009, 2014) and forecasts (2019, 2024) by product, market, and US region. The study also considers key market environment factors, examines the industry structure, evaluates company market share and profiles 36 competitors in the US industry.



## Related Studies

### Outdoor Furniture & Grills

US demand for outdoor furniture, heaters, cooking appliances, and accessories is forecast to rise 3.7 percent annually to \$9.1 billion in 2019. Trends toward at-home *al fresco* entertainment and “stay-cations” will support gains. Outdoor furniture and accessories will remain dominant, while patio heating products will grow the fastest from a small base. This study analyzes the \$7.6 billion US outdoor furniture and grill industry, with forecasts for 2019 and 2024 by product, market, and region. The study also evaluates company market share and profiles industry players.

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

### Landscaping Products

Demand for landscaping products in the United States is forecast to grow 5.3 percent per year to \$8.2 billion in 2019. Decorative products will remain the largest segment, while hardscape products will continue as the fastest growing. Environmental concerns will favor products such as solar lighting and permeable pavers. This study analyzes the \$6.3 billion US landscaping products industry, with forecasts for 2019 and 2024 by product, market, end user, and US region. The study also evaluates company market share and profiles industry players.

#3300.....August 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

### World Power Tools

Global power tool demand will rise 4.8 percent per year through 2018 to \$32.9 billion. The US will remain the largest market, while China and India remain the fastest growing. Cordless electric tools will outpace the larger corded power tool segment. The dominant professional market will outpace consumer demand. This study analyzes the \$26 billion world power tool industry, with forecasts for 2018 and 2023 by product, electric power source, market, world region, and for 25 countries. The study also evaluates company market share and profiles industry participants.

#3241.....January 2015.....\$6500

### 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:

- Automotive & Transport • Chemicals • Construction & Building Products • Consumer Goods • Energy & Petroleum • Industrial Components • Healthcare & Life Sciences • Machinery & Equipment • Metals, Minerals & Glass • Packaging • Plastics & Other Polymers • Security • Services • Textiles & Nonwovens • Water Treatment

[Click here to learn more about Freedonia](#)

## Freedonia Custom Research

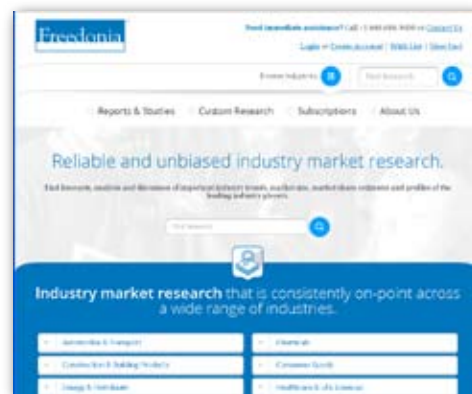
Freedonia Custom Research delivers the same high quality, thorough and unbiased assessment of an industry or market as an industry study. Since the research initiative is based upon a company’s specific needs, companies harness Freedonia’s research capabilities and resources to answer unique questions. When you leverage the results of a Freedonia Custom Research engagement, you are able to obtain important answers to specific questions and issues associated with: mergers and acquisitions, new product launches/development, geographic expansion, entry into new markets, strategic business planning, and investment and funding decisions.

Freedonia Custom Research is ideal for companies seeking to make a strategic difference in the status quo and focus on future business growth. Working side by side with clients, Freedonia’s team is able to define a research project that is custom-tailored to answer specific questions and provide the basis from which a company can make informed business decisions.

[Click here to learn more about Custom Research](#)



[Click here for complete title list](#)



[Click here to visit freedoniagroup.com](http://freedoniagroup.com)