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Outdoor Furniture & Grills

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

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INDUSTRY STRUCTURE

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Sales will benefit from continued emphasis on a blending of outdoor and indoor spaces, and by ongoing preferences for higher-value outdoor pieces that will boost value demand.

US demand to rise 3.7% annually through 2019

US demand for outdoor furniture and grills (including patio heaters, outdoor cooking appliances, and accessories such as cushions, umbrellas, and grilling utensils) is forecast to rise 3.7 percent annually to \$9.1 billion in 2019. After peaking in 2007, US sales of outdoor furniture and grills plummeted in 2009. An improving economy and trends toward at-home outdoor entertaining and “staycations” supported growth between 2009 and 2014. Through 2019, sales will benefit from continued emphasis on a blending of outdoor and indoor spaces. Likewise, ongoing preference for higher-value pieces will boost value demand.

Dominant residential market to grow fastest

Single-family dwellings comprise the largest share of the dominant residential market for outdoor furniture and grills, due to their larger yards and amenability to decks, patios, and porches. Double-digit advances in housing completions and continued growth in consumers’ disposable incomes will benefit residential demand going forward. Sales to the smaller nonresidential market will slow from the 2009-2014 rate, due to weakening replacement demand in the hospitality sector. Sales to national, state, and local parks will advance the fastest among all markets, expanding from a depressed 2014 base, when demand was hampered by government cuts.



Patio heaters, furniture to post fastest growth

The dominant outdoor furniture and accessories market will post solid gains, accounting for over three-fourths of demand increases. Trade in these pieces has increased in recent years, with metal and wicker products accounting for the greatest growth in imports. While increasing production costs abroad and stylistic trends will mute imports of these products somewhat going forward, the trade deficit in outdoor furniture will continue to rise. Heightened attention to style and improved fabric durability will support demand for related accessories, which can inexpensively refresh or update furniture.

In the grills and accessories market, demand is approaching saturation and will be the slowest among major product segments. As a result, grill purchases are primarily of replacement or additional models (e.g., for camping or tailgating purposes). Going forward, a trend toward higher-end grills and complementary outdoor cooking appliances such as pizza ovens, smokers, and turkey fryers will boost value gains. Demand for patio heating products is forecast to grow robustly through 2019. These products are increasingly popular due to their ability to extend the outdoor season, and have a spillover effect on outdoor furniture demand since they increase the usability of the latter.

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Sample Text, Table & Chart

MARKETS

Residential Market

In 2014, the residential market comprised 92 percent, or 1.1 billion, of the outdoor furniture and grill market. The segment saw flat growth in 2014 and a slight decline in 2009 due to recession. The residential market returned to or exceeded pre-recession levels in 2014, by a large part by the cost-saving measures taken in the "leisure" area.

SAMPLE
TEXT

Through 2019, the residential market for outdoor furniture and grills is forecast to expand 3.6 percent annually to \$8.3 billion, slightly from the pace of the 2009-2014 period. Among multifamily and single-family housing will see the fastest growth, outpacing the average. Demand in these markets will be driven by double-digit growth in residential building construction expenditures and new housing unit completions, as well as by continued increases in the penetration of patios and decks on new single-family housing units. Steady growth in household formation through the forecast period will also support demand. The continued trend toward creating outdoor living spaces that blend with the indoor sphere and bring indoor comforts outside, particularly with increasingly high-end furniture and cooking appliances, will buoy demand.

Sales will also be spurred by the ongoing popularity of spending leisure time and entertaining outdoors. In addition, media outlets ranging from decorating magazines (such as Better Homes & Gardens Casual Living) to cable channels with heavy home and gardening (including HGTV and the DIY Network) -- bring home improvement and decorating ideas to homeowners, promoting trends in outdoor rooms. Furthermore, some homeowners will opt to create their outdoor living spaces, either in preparation for sale or

129

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TABLE III-1

OUTDOOR FURNITURE & GRILL SUPPLY & DEMAND (million dollars)

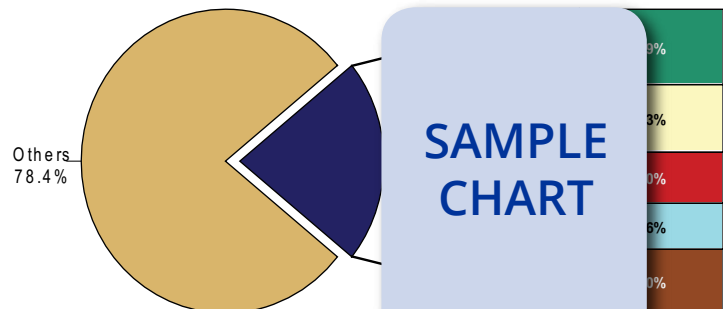
Item	2004	2009	2014	2019	2024
Housing Stock (million units)					
\$ furniture & grills/housing unit					
Outdoor Furniture & Grill Demand					
Outdoor Furniture & Accessories					
Grills & Accessories					
Patio Heating Products					
-imports					
+exports					
Outdoor Furniture & Grill Shipments					
deflator (2009=100)					
Outdoor Furn & Grill Shpts (mil 2009\$)					

SAMPLE
TABLE

Source: The Freedonia Group, Inc.

CHART VI-1

US OUTDOOR FURNITURE & GRILL MARKET SHARE, 2014 (\$7.6 billion)



SAMPLE
CHART

Sample Profile & Table, & Study Coverage

TABLE V-7
NORTHEAST OUTDOOR FURNITURE & GRILL DEMAND
BY SUBREGION & PRODUCT
 (million dollars)

Item	2004	2009	2014	2019	2024
Northeast Housing Stock (million units)					
\$ furniture & grills/housing unit					
Northeast Outdoor Furniture/Grill Demand					
By Subregion:					
New England					
Middle Atlantic					
By Product:					
Outdoor Furniture & Accessories					
Grills & Accessories					
Patio Heating Products					
% Northeast					
Outdoor Furniture & Grill Demand					

Source: The Freedonia Group, Inc.



COMPANY PROFILES

Brinkmann Corporation
 4215 McEwen Road
 Dallas, TX 75244
 972-716-4262
<http://www.brinkmann.com>

Annual Sales: \$1.2 billion
 Employment: 1,200

Key Products: outdoor lighting fixtures, motion detectors, and solar-powered lights; boat and personal watercraft covers; pet products; lawn and garden products; and camping, hunting and fishing gear.

Other products include: outdoor lighting fixtures, such as general purpose outdoor lighting fixtures, motion detectors, and solar-powered lights. The Company also manufactures outdoor cooking products; boat and personal watercraft covers; pet products; lawn and garden products; and camping, hunting and fishing gear.

The Company participates in the US outdoor furniture and grill industry via the production and marketing of a range of outdoor cooking appliances, including grills, smokers, and camping stoves. Brinkmann also presents a range of accessories and replacement parts intended for use with these products. The Company manufactures grills and smokers in gas, charcoal, and electric models with up to five burners. Representative grills and smokers from Brinkmann include MAXFIRE TORCH two-burner, GRILL KING four-burner, and MEDALLION and ELITE DUAL SEAR five-burner gas grills; 55-gallon drum and GO GRILL portable charcoal grills; VERTICAL TRAILMASTER and barrel charcoal smokers; and PORTICO electric grills. Furthermore, Brinkmann manufactures various combination units, among them being

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STUDY COVERAGE

This Freedonia study, *Outdoor Furniture & Grills*, gives historical demand data (2004, 2009, 2014) plus forecasts (2019, 2024) by product, market, and region of the US. The study also considers key market environment factors, assesses the industry structure, details company market share and profiles 36 industry players.

Related Studies

World Consumer Air Treatment Systems

This study analyzes the global market for consumer air treatment systems. It presents historical data (2004, 2009, and 2014) and forecasts (2019 and 2024) by product type (whole-house, portable), technology (e.g., conventional filtration, electrostatic, ionization), world region and major country. Demand for replacement air filters is also included. The study also considers market environment factors, details industry structure, evaluates company market share and profiles industry players.

#3343..... December 2015.....\$6400

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..... December 2015.....\$5300

Janitorial Equipment & Supplies

US demand for janitorial equipment and supplies will rise 2.2 percent annually through 2019 to \$7.1 billion, driven by pent-up demand for automated floor cleaning equipment. Office and institutional buildings will remain the largest and fastest growing markets. In-house purchasers will remain dominant, but will be outpaced by contract cleaners. This study analyzes the \$6.4 billion US janitorial equipment and supply industry, with forecasts for 2019 and 2024 by product, market and purchaser. The study also evaluates company market share and profiles industry competitors.

#3311..... August 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

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

About The Freedonia Group

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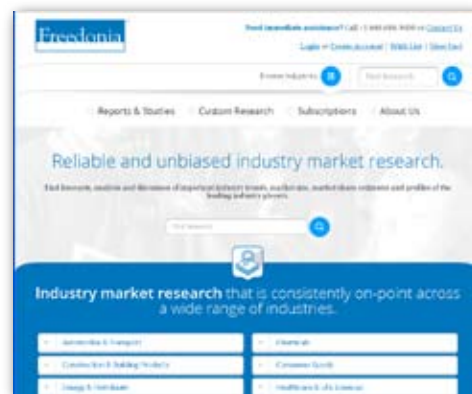
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