

Lawn & Garden Consumables

US Industry Study with Forecasts for 2020 & 2025

Study #3422 | June 2016 | \$5300



Demand for packaged lawn and garden consumables for the consumer/do-it-yourself (DIY) segment will be supported by rising consumer interest in lawn and garden maintenance activities, particularly as safe, easy-to-use, environmentally friendly products continue to be readily available in an ever-expanding array of options. In addition, vegetable, fruit, and herb gardens are expected to remain popular among consumers who adopted edible gardening as an inexpensive, productive, and sustainable hobby during the economic recession. As economic conditions continue to improve and the housing market expands, professional landscaping firms will see growth in business. Rising government spending will also contribute to higher demand for lawn and garden consumables at public buildings and parks.

Lawn & turf to remain largest application

Lawn and turf applications will remain the largest end use for consumables, largely based on the vast amount of acreage devoted to lawns and turf in residential yards, public spaces, and golf courses. Lawn maintenance is an established, popular outdoor pastime among consumers, and the widening range of available consumer products makes lawn care less daunting to amateurs. However, concerns about the environmental impact of lawn irrigation in typically dry parts of the US, increasing wariness of excessive fertilizer and pesticide use, and slowly declining golf course acreage will partially offset some of these factors. Demand for consumables for use in gardens and

borders will benefit from expanding landscaping budgets in both residential and commercial settings, and from the ever-growing popularity of home and community gardens.

Safer, efficient options will boost growth

Fertilizers and pesticides will continue to account for the majority of lawn and garden consumables demand, particularly as the introduction of safer, more efficient products offsets concerns about overuse of chemicals. Value-added products such as specialty soil blends, branded or patented seed varieties, and customized colorful mulches are expected to show healthy growth, though packaged consumables will still face considerable competition from products such as bulk growing media and mulch, which are much less expensive.

Study coverage

This study analyzes the US lawn and garden consumables market. It presents historical demand data (2005, 2010, 2015) plus forecasts (2020, 2025) by product (fertilizers, pesticides, growing media, seeds, mulch, other), market (residential, government & institutional, commercial & industrial, golf course, other), application (lawn & turf care, gardens & borders, other), end user (consumer/DIY, professional) and US region. In addition, the study assesses market environment factors, analyzes industry structure, evaluates company market share and profiles 36 industry competitors.

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Residential

The residential segment -- including both consumer and professional users -- accounted for 72 percent of the total lawn and garden consumables market in 2015. With nearly 40 million acres of lawn in the US, more than half of residential spending is on lawn care, most notably on fertilizers and pesticides. Spending on other products is considerable, but many of the other items are bulkier and less expensive on a unit basis. While lawn and garden consumables demand benefit from increasing numbers of new housing completions, these advantages will be partially offset by the desire among some homeowners to reduce lawn maintenance costs and water consumption via smaller areas of maintained grass. As a result, opportunities for lawn and garden consumables will benefit from the installation and maintenance of lawns, vegetable gardens, trees, and shrubs. Further promoting growth in other residential lawn and garden consumables will be the trend toward outdoor living spaces complete with kitchens and living and dining areas, as landscaped beds and gardens typically surround these quarters.

Demand for packaged lawn and garden consumables in the residential market is forecast to continue to grow through 2025. Sustained growth in discretionary incomes will create opportunities for products that are used in existing lawns and gardens. Lawn and garden consumables have been encouraged through branding and new products, improved packaging, and better value. Among professional users, demand for lawn and garden consumables is expected to return of customers who reduced or eliminated the use of lawn care and landscaping services during the economic downturn. Also fueling

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PESTICIDE DEMAND IN LAWN & GARDEN APPLICATIONS (million dollars)

Item	2005	2010	2015	2020	2025
Total Pesticide Sales					
% lawn & garden					
Lawn & Garden Pesticide Sales					
By Type:					
Herbicides					
Insecticides					
Other Pesticides					
By Market:					
Residential					
Golf Courses					
Government & Institutional					
Commercial & Industrial					
Other Markets					
\$/lb					
Lawn & Garden Pesticide Sales (mil lb)					

Source: The Freedonia Group

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LAWN & GARDEN CONSUMABLES DEMAND BY APPLICATION (million dollars)

Item	2005	2010	2015	2020	2025
Resident Population (mil)					
\$ consumables/capita					
Lawn & Garden Consumables Sales					
Lawn & Turf Care					
Gardens & Borders					
Other Applications					

Source: The Freedonia Group

This study can help you:

- Determine your market & sales potential
- Learn more about industry competitors
- Assess new products & technologies
- Identify firms to merge with or acquire
- Complement your research & planning
- Gather data for presentations
- Confirm your own internal data
- Make better business decisions

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Related Studies

Power Lawn & Garden Equipment

US demand for power lawn and garden equipment will rise 3.2 percent annually to \$11.7 billion in 2019. Turf and grounds equipment and hedge trimmers will be the fastest growing products, while lawnmowers remain the largest segment. Growth in the commercial market will continue to outpace the dominant residential segment. This study analyzes the \$10 billion US power lawn and garden equipment industry, with forecasts for 2019 and 2024 by product, market, and region. The study also evaluates company market share and profiles industry competitors.

#3340..... December 2015 \$5300

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 "staycations" 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

Contact Freedonia

1.800.927.5900 (US & Canada)

+1 440.684.9600 (Int'l)

email: info@freedoniagroup.com

website: freedoniagroup.com

Freedonia's methods

- Establishing consistent economic & market forecasts
- Using input/output ratios, flow charts & other economic methods to quantify data
- Employing in-house analysts who meet stringent quality standards
- Interviewing key industry participants, experts & end users
- Researching a proprietary database that includes trade publications, government reports & corporate literature

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