

Power Lawn & Garden Equipment Market in the US

Industry Study with Forecasts for 2021

Study #3501 | February 2017 | \$5500



US demand growth for power lawn and garden equipment will be based on gains in personal consumption expenditures and the single-family housing stock expanding the large residential market, as well as an aging demographic fueling demand for high-value equipment that is easy to utilize.

Innovation, growing do-it-for-me market to drive advances

Innovations including robotic lawnmowers and more powerful and longer operating battery-powered models will drive advances. The do-it-for-me market -- due to lack of time, interest, or ability -- will continue to support rapidly growing landscaping services, which use high value products with more power and features.

Future demand gains to face significant restraints

Future demand gains will be restrained by such factors as:

- A decline in the number of operational golf courses, constricting the demand base
- Further competition from used equipment, exacerbated by the increased supply of used equipment created by golf course closures
- Rising price competition, particularly in more basic product categories
- Low rates of homeownership among millennials

Battery-powered products to gain market share

Battery-powered lawn and garden equipment has become increasingly common, and sales of these products are expected to grow quickly through 2021. Recent technological advances have made battery-powered products more capable of competing with engine driven equipment on a performance basis without sacrificing cost competitiveness. As a result, sales of battery-powered products are expanding rapidly beyond the traditional residential markets and into commercial markets. In particular, battery-powered chainsaws for commercial users are quickly transitioning from a niche product to a major part of the industry.

Study coverage

This study examines the US power lawn and garden equipment market. It presents historical demand data for 2006, 2011 and 2016 plus forecasts for 2021 by product (lawnmowers; turf and grounds equipment; garden tractors and rotary tillers; trimmers and edgers; snow throwers; blowers, vacuums and sweepers; chainsaws; hedge trimmers and others; and parts and attachments), power source (internal combustion, battery, and cordless electric), market (residential, commercial), and region of the US. In addition, the study assesses industry structure, analyzes competitive strategies, evaluates company market share, and lists US industry competitors.

PRODUCTS

Walk Behind Mowers

Demand for walk behind turf and grounds mowers is projected to grow through 2021. While growth in landscaping sales gains, advances for these products are being offset by strong functional competition from riding turf and grounds mowers tend to favor high end residential walk behind models to serve similar functions. However, for golf courses and sporting venues, which use riding mowers provide is an important

supported by improvements in battery-powered mowers are expected to remain a niche market going forward. Demand will also be bolstered by sales of remote controlled mowers, which are most often used on terrain that has a slope too dangerous for a riding mower. Use of these products is particularly concentrated in highway maintenance. Remote controlled mowers offer a safer alternative for maintaining areas with steep embankments, where the operator can stand on level ground and direct the mower. In addition, these products offer time savings compared to the alternative of using multiple handheld trimmers to complete the task. Remote controlled mowers command a price premium, though their effect on the overall walk behind mower segment will be limited by their niche status.

Walk behind turf and grounds mowers fared slightly better than riding models around the Great Recession, increasing as a share of the turf and grounds mower total in 2009 and 2010. However, in subsequent years, riding turf and grounds mowers posted a strong rebound, and the share of walk behind models in the product mix declined.

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Table 5-8 | West Power Lawn & Garden Equipment Demand by Market (million dollars)

Item	2006	2011	2016	2021
US Power Lawn & Garden Equip Demand % West				
West Power L&G Equipment Demand Residential				
Commercial				

Source: The Freedonia Group

Table 4-3 | Commercial Market: Power Lawn & Garden Equipment Demand (million dollars)

Item	2006	2011	2016	2021
Commercial Power L&G Equipment Demand				
By Product:				
Lawnmowers				
Turf & Grounds Equipment				
Trimmers & Edgers				
Garden Tractors & Rotary Tillers				
Chainsaws				
Blowers, Vacuums, & Sweepers				
Snow Throwers				
Hedge Trimmers & Other				
Parts & Attachments				
By Market:				
Landscaping Establishments				
Golf Courses				
Government & Other				

Source: The Freedonia Group

Table 3-3 | Electric Lawn & Garden Equipment Demand (million dollars)

Item	2006	2011	2016	2021
Power Lawn & Garden Equipment Demand* % electric				
Electric Equipment Demand*				
By Product:				
Lawnmowers				
Trimmers & Edgers				
Blowers, Vacuums, & Sweepers				
Other				
By Power Source:				
Corded Electric				
Battery				

*excludes parts & attachments

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

Global Diesel Engine Market

Global diesel engine demand is projected to expand 5.8 percent per year through 2020 to \$238 billion. Over half of all new product demand will be in the Asia/Pacific region, while the Central and South America and the Africa/Mideast regions will grow the fastest. Sales of motor vehicle diesel engines will post robust growth. This study details the \$180 billion global diesel engine market, with forecasts for 2020 and 2025 by product and market in 6 world regions and 25 countries. The study also evaluates company market share and lists global industry competitors.

#3488..... January 2017 \$6300

Lawn & Garden Consumables

US demand for packaged lawn and garden (L&G) consumables (e.g., seeds, fertilizer, pesticides, growing media, mulch) is forecast to rise 3.4 percent per year to \$9.3 billion in 2020. Lawn and turf applications will remain the largest end use for consumables, while fertilizers and pesticides will continue to account for most demand. This study details the \$7.9 billion market for L&G consumables, giving forecasts for 2020 and 2025 by product, market, application and end use. The study also evaluates company market share and profiles US industry players.

#3422..... June 2016 \$5300

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

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

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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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