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.
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Walk Behind Mowers
Demand for walk behind turf and grounds mowers is projected to increase 2.1% annually to $90 million in 2021. While growth in landscaping services spending will promote sales gains, advances in battery-powered models 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, as an operator can stand on level ground and direct the mower. In addition, these products offer time savings compared to the alternative of employing 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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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 8 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 2018---------- $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 lawn mowers 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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