

Lawn and Garden Equipment in the U.S.

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Abstracts

Americans love to care for their lawns and gardens, but the economy and weather conspired to suppress sales of lawn and garden (L&G) equipment over the last five years. The \$10 billion retail market, consisting of outdoor power equipment (OPE), tools and implements (T/I), and watering/spraying equipment (W/S), declined by a CAGR of over 1% between 2008 and 2012. OPE accounted for over two-thirds of L&G equipment retail dollar sales in 2012.

The overall market presents challenges and opportunities for both marketers and retailers. A relatively small number of players account for the majority of sales, making for a highly competitive situation that is particularly difficult for new entrants. Few marketers compete across all categories, and leaders differ by category. Husqvarna and MTD Products are the largest marketers of OPE. Ames True Temper is the leader by a wide margin in T/I, and is a major player in some W/S products. The W/S category has a few major competitors leading individual product segments.

Retailing is even more concentrated, with 75% of sales coming from mass retailers, primarily Home Depot, Lowe's, Sears/Kmart (both owned by Sears Holdings) and Walmart. Consumers also shop the Internet aggressively, mainly for information and pricing on OPE. They demand low prices and value, challenging marketers to innovate with products that either cost less or are worth a higher price. Zero turn radius lawn mowers and dual-stage snow blowers are examples of products that consumers have been willing to pay more for. They also represent higher-performance but easier-to-use products that have been trending across all categories.

This study projects retail sales in this market will increase by a CAGR of 2.5% to reach \$11.4 billion in 2017. The forecast assumes an improving economy, a continued recovery in housing, and an increase in household formations. Existing homeowners have pent-up demand for some products, and new homeowners will have to stock up on

a range of products to take care of their lawns and gardens.

Scope of Report

This report presents a detailed analysis of the U.S. consumer market for do-it-yourself lawn and garden (L&G) equipment. It outlines key issues and trends affecting the overall market and analyzes all product categories including outdoor power equipment (OPE), tools and implements (T/I), and watering/spraying equipment (W/S). The report also discusses major players and brands and analyzes their key activities and performance. Market size data are provided for 2008–2012 and projections for 2012–2017. All retail channels that sell consumer L&G equipment are covered and considered in arriving at overall market size estimates, market trends and competitive analysis.

Methodology

The information in this report was obtained from both primary and secondary research. Primary research included consultation with industry sources, a national online consumer usage survey conducted in June 2013 by Packaged Facts, and on-site examinations of the retail sector. Secondary research entailed gathering data from relevant trade, business and government sources, as well as company promotional literature and annual reports.

Our estimates of market size and company performance are based on reported revenues of product manufacturers and retailers, and figures from other market research sources. Our analysis of consumer trends draws on data compiled by Simmons, New York, NY, a division of Experian Marketing Services. On an ongoing basis, Simmons conducts booklet-based surveys of a large and random sample of consumers who in aggregate represent a statistically accurate cross-section of the U.S. population. The 2005 through 2013 surveys cited in this report are based on samples of approximately 25,000 U.S. adults.

Contents

CHAPTER 1: EXECUTIVE SUMMARY

Scope of Report

Methodology

Product Category Definitions

L&G Equipment Sales at \$10 Billion in 2012

Figure 1-1 Retail Dollar Sales of Lawn & Garden Equipment, 2008–2012 (in millions)

Sales Increase Only One Year Since 2008

Table 1-1 Retail Dollar Sales of Lawn & Garden Equipment, 2008–2012 (in millions)

Factors Affecting Growth

Economy

Figure 1-2 Monthly Sales of Building Materials, Garden Equipment, & Supply Dealers, 2006–2013 (\$ millions)

Housing Recovering, Still Below 2005 Peak

Category Sales

Figure 1-3 Retail Dollar Shares of Lawn & Garden Equipment by Product Category, 2012 (percent)

Table 1-2 Retail Dollar Sales of Lawn & Equipment by Category 2008–2012 (in millions)

Lawn Care Products Account for Majority of OPE Sales

Table 1-3 Retail Dollar Sales of Outdoor Power Equipment by Product Segment, 2012 (millions)

Long-Handled Tools at a Third of T/I Category Sales

Figure 1-4 Retail Dollar Shares of Tools and Implements by Product Segment, 2012 (percent)

Table 1-4 Retail Dollar Sales of Tools and Implements by Product Segment, 2012 (millions)

Hoses and Reels Lead W/S Equipment Category

Figure 1-5 Retail Dollar Shares of Watering/Spraying Equipment by Product Segment, 2012 (percent)

Table 1-5 Retail Dollar Sales of Watering/Spraying Equipment by Product Segment, 2012 (millions)

Three Quarters of L&G Equipment Sales from Mass Retailers

Figure 1-6 Retail Dollar Shares of Lawn & Garden Equipment by Retail Channel, 2012 (percent)

Market Forecast

Figure 1-7 Projected Retail Dollar Sales for Lawn & Garden Equipment, 2012–2017

(in millions)

Lawn and Garden Equipment Marketers

Figure 1-8 Leading Marketers of L&G Equipment by Manufacturers' Dollar Share, 2012 (percent)

Marketing and New Product Trends

Consumers Shop Internet, Particularly for OPE

About a Third of Consumers Garden

Demographics of Gardeners

Two-Thirds of U.S. Households Own L&G Equipment

Blowers, Trimmers, Lawn Mowers Most-Owned L&G Power Equipment

Shovels and Rakes Most-Owned L&G Tools/Implements

Small Percentage of Households Purchase L&G Equipment

Table 1-6 Households That Bought Lawn & Garden Equipment in Last 12 Months, 2005-2013 (percent)

Garden Hose and Hose End Watering Products Bought Most Frequently

Table 1-7 Consumers That Bought Watering or Spraying Lawn & Garden Equipment in Last 12 Months, 2013 (percent)

CHAPTER 2: THE MARKET

Introduction

Scope of Report

Methodology

Product Category Definitions

Outdoor Power Equipment Category

Tools and Implements Category

Watering/Spraying Equipment Category

Areas Outside Scope

Market Size and Growth

L&G Equipment Sales at \$10 Billion in 2012

Figure 2-1 Retail Dollar Sales of Lawn & Garden Equipment, 2008–2012 (in millions)

Sales Increase Only One Year Since 2008

Table 2-1 Retail Dollar Sales of Lawn & Garden Equipment, 2008–2012 (in millions)

Factors Affecting Growth

Economy

Figure 2-2 Change in GDP and Personal Consumption Expenditures, 2006–2013 (percent)

Figure 2-3 Monthly Sales of Building Materials, Garden Equipment, & Supply

Dealers, 2006–2013 (\$ millions)

Housing Recovering, Still Below 2005 Peak

Figure 2-4 Annual Existing Home Sales and Housing Starts, 2002-2013

Table 2-2 Annual Existing Home Sales and Housing Starts, 2002-2013

Household Formation Lags

Figure 2-5 Number of U.S. Households, 2002-2012

Weather

Seasonality

Regionality

Category Sales

Figure 2-6 Retail Dollar Shares of Lawn & Garden Equipment by Product Category, 2012 (percent)

Table 2-3 Retail Dollar Sales of Lawn & Equipment by Category, 2008–2012 (in millions)

Product Segment Sales

Lawn Care Products Account for Majority of OPE Sales

Figure 2-7 Retail Dollar Shares of Outdoor Power Equipment by Product Segment, 2012 (percent)

Table 2-4 Retail Dollar Sales of Outdoor Power Equipment by Product Segment, 2012 (millions)

Long-Handled Tools About a Third of T/I Category Sales

Figure 2-8 Retail Dollar Shares of Tools and Implements by Product Segment, 2012 (percent)

Table 2-5 Retail Dollar Sales of Tools and Implements by Product Segment, 2012 (millions)

Hoses and Reels Lead W/S Equipment Category

Figure 2-9 Retail Dollar Shares of Watering/Spraying Equipment by Product Segment, 2012 (percent)

Table 2-6 Retail Dollar Sales of Watering/Spraying Equipment by Product Segment, 2012 (millions)

Three Quarters of L&G Equipment Sales from Mass Retailers

Figure 2-10 Retail Dollar Shares of Lawn & Garden Equipment by Retail Channel, 2012 (percent)

Home Centers

Discount Stores

L&G Specialty Stores

Hardware Stores

Other

Market Forecast

Figure 2-11 Projected Retail Dollar Sales for Lawn & Garden Equipment, 2012–2017
(in millions)

CHAPTER 3: MARKETERS

Table 3-1 Selected Marketers of L&G Equipment by Product Category, 2013

Table 3-2 Selected Private-Label Lawn & Garden Equipment Brands, 2013

Lawn and Garden Equipment Market

Figure 3-1 Leading Marketers of L&G Equipment by Manufacturers' Dollar Share, 2012 (percent)

Outdoor Power Equipment Category

Table 3-3 Leading Marketers of Lawn & Garden Outdoor Power Equipment

Table 3-4 Leading and Significant Marketers of Lawn & Garden Tools & Implements, 2012

Watering/Spraying Equipment Category

Table 3-5: Leading Marketers of Lawn & Garden Watering/ Spraying Equipment

Mergers, Acquisitions, Divestitures

Competitive Profiles

Husqvarna Group

Table 3-6 Husqvarna Lawn & Garden Equipment Products

Table 3-6 [cont'd] Husqvarna L&G Equipment Products

Table 3-7 MTD Products L&G Equipment Products

John Deere

Table 3-8 John Deere Lawn & Garden Equipment Products

TTI (Techtronic Industries)

Table 3-9 TTI Lawn & Garden Equipment Products

Toro

Table 3-10 Toro Sales, Fiscal Years 2008–2012 (in millions)

Table 3-11 Toro Lawn & Garden Equipment Products

Briggs & Stratton

Table 3-12 Briggs & Stratton Sales, Fiscal Years 2008– (in millions)

Shift from Mass Market

Table 3-13 Briggs & Stratton Lawn & Garden Equipment Products

Ariens

Table 3-14 Ariens Lawn & Garden Equipment Products

Stihl Inc.

Table 3-15 Stihl Lawn & Garden Equipment Products

Honda Power Equipment

Table 3-16 Honda Lawn & Garden Equipment Products

Stanley Black & Decker

Table 3-17 Black & Decker Lawn & Garden Equipment Products

Echo Inc.

Table 3-18 ECHO Lawn & Garden Equipment Products

Ames True Temper

Table 3-19 Ames True Temper Sales, Fiscal Years 2008– (in millions)

Broad Product Portfolio

Table 3-20 Ames True Temper Lawn & Garden Equipment Products ..

Fiskars

Table 3-21 Fiskars Lawn & Garden Equipment Products

Corona Clipper

Table 3-21 Corona Clipper Lawn & Garden Equipment Products

Swan Products (formerly owned by Tekni-Plex)

Table 3-22 Swan Lawn & Garden Equipment Products

Teknor Apex

Table 3-23 Teknor Apex Lawn & Garden Equipment Products

Suncast Corp.

Table 3-24 Suncast Lawn & Garden Equipment Products

Bosch

Table 3-25 Bosch Lawn & Garden Equipment Products

Rain Bird

Table 3-26 Rain Bird Lawn & Garden Equipment Products

Table 3-27 Orbit Irrigation Lawn & Garden Equipment Products

Table 3-28 Sears Craftsman Lawn & Garden Equipment Products

CHAPTER 4: NEW PRODUCT, RETAILING, AND MARKETING TRENDS

Product Trends

Outdoor Power Equipment Category

All-Wheel Drive Mowers for Traction

Zero Turn Mowers Growing

Dual Stage Snow Blowers Powerful Yet Compact, Easy to Use

Non-gas Technology Advancing

Electric Is Eco-Friendly

“Intelligent Technology to Replace Gas”

E15 a Problem for OPE

Tools and Implements Category

Ergonomic for Greater Comfort

Ease and Performance

Easier Hauling
Multi-functional Tool Handle
Watering/Spraying Equipment Category
Water Conservation Key for Irrigation
Healthier Hoses
Style Plus Performance
Ease and Convenience
Retailing Trends
Consumers Shop Internet, Particularly for OPE
Selling the Brand Instead of Product
Turf Wars
Some Shift to Dealers
Marketing Trends
Troy-Bilt's Saturday
Rain Bird in the Wild Facebook Photo Contest
Stihl Dealer Days
Stihl Text2Win
Corona Clipper Garden App
Fiskars' Project Orange Thumb
Event Sponsorship Builds Brand Awareness
Licensing Extends Brand Reach
Warranty as Marketing Tool

CHAPTER 5: THE CONSUMER

About a Third of Consumers Garden

Figure 5-1 Percent Who Gardened in Last 12 Months, 2005- (adults)

Demographics of Gardeners

Table 5-1 Demographic Characteristics of Adults Who Gardened in Last 12 Months, 2013 (index)

Table 5-1: [cont'd] Demographic Characteristics of Adults Who Gardened in Last 12 Months, 2013 (index)

Two-Thirds of U.S. Households Own L&G Equipment

Table 5-2 Households Who Own Lawn & Garden Equipment, 2005-2013 (percent)

Size of Land Influences L&G Equipment Ownership

Table 5-3 Households That Own Lawn & Garden Equipment: By Size of Land, 2013 (percent)

Blowers, Trimmers, Lawn Mowers Most-Owned L&G Power Equipment

Table 5-4 Households That Own Selected Power Lawn & Garden Equipment: By

Product Type, 2005-2013 (percent)

Shovels and Rakes Most-Owned L&G Tools/Implements

Table 5-5 Households That Own Selected L&G Tools/Implements By Product Type, 2005-2013 (percent)

Small Percentage of Households Purchase L&G Equipment

Table 5-6 Households That Bought Lawn & Garden Equipment in Last 12 Months, 2005-2013 (percent)

Trimmers Bought More than Other L&G Power Equipment

Table 5-7 Households That Bought Selected Power L&G Equipment in Last 12 Months: By Product Type, 2005-2013 (percent)

Rakes and Shovels Purchased Most

Table 5-8 Households That Bought Selected L&G Tools/Implements in Last 12 Months: By Product Type, 2005-2013 (percent)

Demographic Differences between Owners and Buyers

Age

Income

Region

Race

Kind of Residence

Table 5-9 Demographic Characteristics of L&G Equipment Consumers: By Owners Overall vs. Recent Buyers, 2013 (index)

Brand Preference for L&G Equipment

Table 5-10 Consumers That Own Lawn & Garden Equipment: By Selected Brands, 2013 (percent)

Table 5-10 [cont'd] Consumers That Own L&G Equipment: By Selected Brands, 2013 (percent)

Demographic Differences by Brand

Table 5-11 Demographic Characteristics of L&G Equipment Owners: By Selected Brands, 2013 (index)

Demographic Differences by Selected MTD Products' Brands

Age

Income

Region

Race/Kind of Residence

Table 5-12: Demographic Characteristics of L&G Equipment Owners: By MTD Brands, 2013 (index)

Garden Hose and Hose End Watering Products Bought Most Frequently

Table 5-13 Consumers That Bought Watering or Spraying Lawn & Garden Equipment in Last 12 Months, 2013 (percent)

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