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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.

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