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Outdoor Furniture & Grills

US Industry Study with Forecasts for **2017 & 2022**

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INDUSTRY STRUCTURE

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Rising interest in decorating outdoor spaces as if they were indoor rooms will spur gains; this trend will lead consumers to buy higher-value pieces that coordinate with their interior designs.

US demand to rise 4% annually through 2017

The US outdoor furniture and grill market is expected to grow 4.0 percent per year to \$7.5 billion in 2017, rebounding from the declines of the recession-impacted 2007-2012 period. Rising interest in decorating outdoor spaces as if they were indoor rooms will spur gains; this trend will lead consumers to buy higher-value pieces that coordinate with their interior designs, thus expanding living space to the outdoors. Sales will also grow along with demand for products such as fire pits and patio heaters which enable consumers to extend the outdoor season. The popularity of outdoor dining and recreation, paired with state and local regulations limiting or banning smoking indoors, will aid gains for outdoor furniture and grills in all regions.

Residential market to remain key outlet

Demand for outdoor furniture and grills is dominated by the residential market, which accounted for over 90 percent of sales in 2012; for this reason, recoveries in the housing market and consumer spending have been important stimulants of demand since 2010 and will continue to be so through 2017. Demand in the smaller nonresidential market -- primarily from lodging and restaurants -- is anticipated to improve as well. Pent-up replacement demand will support growth as these venues continue to recover from the 2007-2009 recession.

US Outdoor Furniture & Grill Demand, 2017 (\$7.5 billion)



Patio heating products to be fastest growing types

Outdoor furniture and accessories will see 4.0 percent annual growth through 2017, benefiting from the extension of indoor-style decorating to patios and decks. Furniture gains will stem from interest in motion pieces, such as swiveling chairs, and from purchases of higher-value deep seating, with cushions that resemble those found on indoor chairs and sofas.

Demand for grills and grilling accessories will grow 3.5 percent per annum, the slowest rate of the product groups, but representing a healthy rebound from the declines suffered during the 2007-2012

period. While most consumers cannot afford high-end outdoor kitchens, their awareness of the trend will stimulate higher-value grill purchases. In addition, there is growing interest in owning more than one grill; some homeowners enjoy multiple preparation techniques, such as smoking or frying, while others purchase portable grills for tailgating and camping.

Patio heating products, including patio heaters and fire pits that allow outdoor spaces to be used comfortably even in cooler weather, will see the fastest growth through 2017, albeit from a small base. This product segment has a spillover impact since consumers spend more on outdoor furnishings when they can be used for a greater part of the year.

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Sample Text, Table & Chart

PRODUCTS

Cushions & Covers

Demand for cushions and covers is expected to increase through 2017, lagging the rate of total demand for furniture and accessories. Manufacturers are developing new types which get hot to the touch, adding to the value of consumer interest in cushions. The availability of mix-and-match sets and cushions made from fabrics that blend well will support demand for separate cushions and covers.

**SAMPLE
TEXT**

Still, a number of companies continue to sell cushions and covers with their furniture, particularly with furniture types that are not considered comfortable without them. Additionally, consumers will continue to replace worn or outdated cushions in order to update their outdoor décor without purchasing new furniture. However, the rising popularity of higher-end deep seating furniture with fixed cushions, which resemble traditional indoor upholstered products, will restrain demand for cushions to some degree. Yet consumers often purchase furniture covers for these higher-cost pieces, so the deep seating trend generates increased value demand for the furniture cover segment. Ongoing interest in higher quality grills also stimulates demand for covers to protect and extend the life of these more expensive products.

Most overseas furniture manufacturers also supply replacement cushions for their products, and a significant share of inexpensive outdoor furniture and grill covers are manufactured in countries with low labor costs. As a result, the US runs a trade deficit in cushions and covers. Nonetheless, US manufacturers of higher-end cushions and grill covers, find some export opportunities. Additionally, many US furniture suppliers also offer replacement cushions; being located closer to the consumer allows them to meet demand more effectively.

80

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TABLE V-10

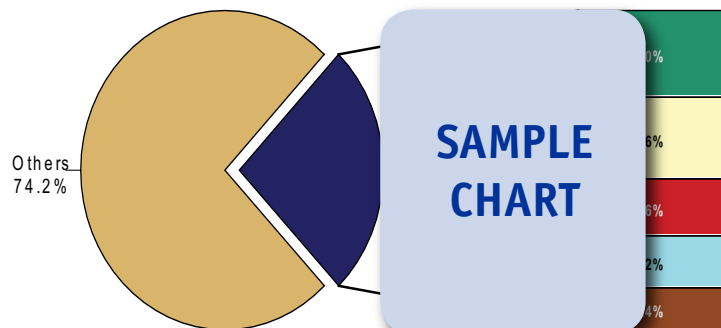
WEST OUTDOOR FURNITURE & GRILL DEMAND BY SUBREGION & PRODUCT (million dollars)

Item	2002	2007	2012	2017	2022
West Housing Stock (mil units)					
\$ furniture & grills/housing unit					
West Outdoor Furniture/Grill Demand					
By Subregion:					
Mountain					
Pacific					
By Product:					
Outdoor Furniture & Accessories					
Grills & Accessories					
Patio Heating Products					
% West					
Outdoor Furniture & Grill Demand					

**SAMPLE
TABLE**

CHART VI-1

US OUTDOOR FURNITURE & GRILL MARKET SHARE, 2012 (\$6.2 billion)

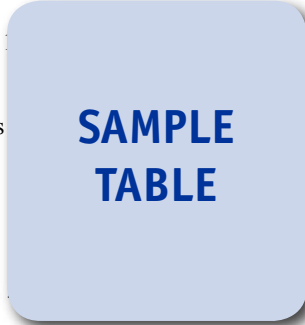


**SAMPLE
CHART**

Sample Profile, Table & Forecast

TABLE IV-2
RESIDENTIAL OUTDOOR FURNITURE & GRILL DEMAND BY HOUSING TYPE
 (million dollars)

Item	2002	2007	2012	2017	2022
Households (million)					
\$ furniture & grills/household					
Residential Outdoor Furniture & Grills					
Single-Family Housing					
Multifamily Housing					
Manufactured Housing					
% residential					
Outdoor Furniture & Grill Demand					



COMPANY PROFILES

Adams Manufacturing Corporation
 109 West Park Road
 Portersville, PA 15864
 724-368-8837
<http://www.adamsmfg.com>

Annual Sales: \$10.5 million
 Employees: 100

Key Products: Outdoor furniture and grills

SAMPLE PROFILE

Adams Manufacturing produces a range of suction cups, holiday and garden decorating accessories, and residential and commercial outdoor furniture. The Company is privately held.

The Company competes in the US outdoor furniture and grill industry through the production and sale of molded resin-based outdoor furniture for residential and commercial end uses. Specific products include various chairs, bar stools, tables, benches, chaise lounges, and umbrellas. These products are sold under such brand names as QUIK FOLD, REALCOMFORT, and SUPERSTACK. Specifically, Adams Manufacturing's REALCOMFORT product line includes Adirondack chairs, which were introduced in March 2012, and bar stools, which were debuted in July 2012. REALCOMFORT products are engineered to have softer support beams and intuitive designs that minimize joint and muscle stress. The QUIK FOLD series encompasses folding chairs and tables, including chairs that can hold up to 250 pounds; side, bistro, and café tables; and coordinated dining sets with two chairs and a table. The Company's SUPERSTACK products comprise square stackable side tables. Additional products from Adams Manufacturing include umbrella bases.

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STUDY COVERAGE

Outdoor Furniture & Grills is a Freedonia study which provides historical data (2002, 2007, 2012) plus forecasts for 2017 and 2022 for demand by product, market and US region. This study also assesses key market environment factors, details company market share and profiles 38 competitors in the US outdoor furniture & grill industry.

OTHER STUDIES

World Major Household Appliances

This study analyzes the world major appliance industry. It presents historical demand data for 2002, 2007 and 2012, and forecasts for 2017 and 2022 by appliance product (refrigerators and freezers, clothes washers and dryers, cooking appliances, dishwashers), world region and major country. The study also considers market environment factors, details industry structure, evaluates company market share and profiles industry players.
 #3098.....January 2014..... \$6400

World Consumer Water Treatment Systems

This study analyzes the world consumer water treatment system industry. It presents historical demand data for 2002, 2007 and 2012, and forecasts for 2017 and 2022 by type (point-of-entry, point-of-use), aftermarket component (e.g., filters, membranes), technology (e.g., conventional filtration, reverse osmosis, distillation), world region, and for 21 countries. The study also considers market environment factors, details industry structure, evaluates company market share and profiles industry participants.
 #3066.....January 2014..... \$6100

World Cooking Appliances

Global demand for cooking appliances will rise at a 5.5 percent annual rate through 2017 to \$65.4 billion. The US will remain the world's largest consumer while China will be the fastest growing. Higher value products will lead gains in developed countries, while first time appliance purchases will dominate developing country markets. This study analyzes the \$50.1 billion world cooking appliances industry, with forecasts for 2017 and 2022 by type, world region, and for 17 countries. The study also evaluates company market share and profiles industry players.
 #3064..... November 2013..... \$6100

Landscaping Products

US demand for landscaping products is projected to grow 6.9 percent per year through 2017 to \$6.5 billion. Hardscape products will grow the fastest, driven by demand for patios and other features of outdoor rooms. The residential market will be the fastest growing segment, driven by a strong rebound in new home construction. This study analyzes the \$4.6 billion US landscaping products industry, with forecasts for 2017 and 2022 by type, market, end use, and US region. The study also evaluates company market share and profiles industry players.
 #3045..... July 2013..... \$5100

Home Organization Products

US demand for home organization products will increase 4.0 percent per year to \$9.4 billion in 2017. Modular units will be the fastest growing product type and will surpass shelving as the second largest segment. Organization products used in garages and closets will be the fastest growing types by room. This study analyzes the \$7.7 billion US home organization product industry, with forecasts for 2017 and 2022 by material, product, room, and market. The study also evaluates company market share and profiles industry players.
 #3027..... May 2013..... \$5100

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