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Lawn & Garden Consumables

Industry Study with Forecasts for **2016 & 2021**

Study #2891 | May 2012 | \$5100 | 318 pages



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A recovery in residential construction activity, coupled with a demand for fertilizer used in conjunction with new lawn installations and rehabilitating vacant property lawns, will spur growth.

US demand to reach \$8.8 billion in 2016

US demand for packaged lawn and garden consumables is projected to rise 3.3 percent annually to \$8.8 billion in 2016. Advances will be boosted by the ongoing recovery in residential construction activity, following a decline of historic proportions. Moreover, although the popularity of gardening is not expected to reach the levels seen in the middle years of the last decade, the participation rate for lawn and garden activities is projected to grow following a downturn precipitated by the 2007-2009 recession and the subsequent slow recovery.

Pesticides, fertilizer to remain major product types

Pesticides and fertilizer will remain the largest types of lawn and garden consumables products. Volume increases for fertilizer will be driven by the recovery of the housing market, which will create demand for fertilizer used in conjunction with new lawn installations, as well as in rehabilitating lawns in properties that have long been vacant. Price growth for fertilizer is expected to moderate following the noteworthy increases in recent years. Gains will be slower for pesticides, in part because the leading products in the lawn and garden market are off-patent, which limits price gains; and because many consumers will seek to reduce pesticide usage due to concerns about user safety and long term environmental impact. Such concerns will contribute to across-the-board faster

US Lawn & Garden Consumables Demand, 2016 (\$8.8 billion)



growth for natural and organic lawn and garden products.

Consumer applications to outpace professional

Consumer applications are expected to post faster gains than the professional segment through 2016. This is largely due to slower than average growth anticipated for the golf course market, the largest nonresidential outlet for lawn and garden consumables. The number of golf courses is expected to remain about the same as it is now. Moreover, in order to contain costs and reduce environmental impact, course superintendents are opting to reduce the amount of land on the course that is maintained at the most aggressive level.

West, South regions to exhibit healthy growth

Growth in each census region is expected to improve over the market's performance in the 2006-2011 period, during which both a recession and a collapse of the US housing market occurred. The South is projected to post above average gains, due to faster population growth created in part by in-migration from elsewhere in the US, a somewhat stronger economic performance, and a less developed professional market. The West will remain by far the largest regional market for lawn and garden consumables, due to similar demographic advantages as those in the South, as well as the large number of golf courses in California and other Western states.

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Sample Text, Table & Chart

REGIONAL MARKETS

West

The West comprises the Mountain and Pacific subregion. West was the focus of significant population in-migration during the second half of the 20th century, with individuals lured by the climate, spaces and prospects of economic opportunity. The West's economy is supported by international trade, commercial and defense technology-producing industries, energy production, travel and tourism, and housing. Through the mid-1990s, the region was somewhat held back by cyclical weakness in the high technology and financial products industries that was exacerbated by federal budget reductions for defense contractors, such as in the aerospace sector. But in 2001 and 2011, the West posted annual economic growth of noticeably faster than growth in the Northeast and Midwest.

Although the West's electronics, computer, agricultural, trade, tourism and services industries were negatively affected by the 2001 recession, they recovered during the course of the US economic expansion that followed. After the dot-com crash in 2000 and the subsequent reorganization of the technology sector in the early part of the new century, the industry both recovered in its traditional areas of domain (i.e., California, Washington) and spread to different states in the region (e.g., Arizona, Colorado and Utah).

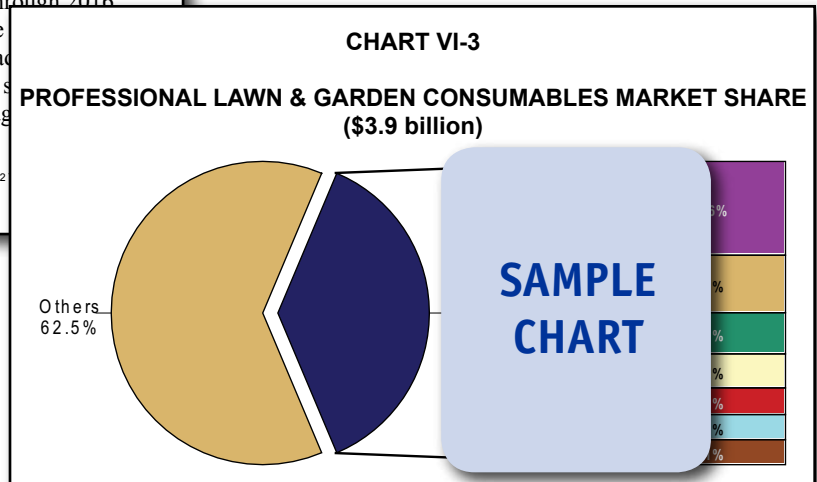
Although concerns about the environmental implications of three-plus decades of relentless growth may lead to some moderation of economic growth, prospects for the region are generally bright. Continued growth at 4.6 percent per year through 2016, an accelerated pace through 2006-2011 period. The region's strong population growth will keep its economy above the national average. The region's population will surpass the national average by 2016, and gains of 1.5 percent will be achieved.

**SAMPLE
TEXT**

TABLE III-3
HERBICIDE SALES IN LAWN & GARDEN APPLICATIONS
 (million dollars)

Item	2001	2006	2011	2016	2021
Lawn & Garden Pesticide Sales					
% herbicides					
Lawn & Garden Herbicide Sales					
By End User:					
Professional					
Consumer/DIY					
By Active Ingredient:					
2,4-D					
Glyphosate					
Other					
\$/lb					
Lawn/Garden Herbicide Sales (mil lb)					

**SAMPLE
TABLE**

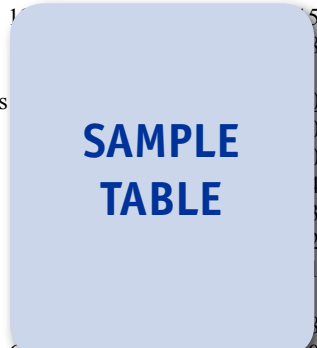


**SAMPLE
CHART**

Sample Profile, Table & Forecast

TABLE IV-4
**GOVERNMENT & INSTITUTIONAL MARKET
 FOR LAWN & GARDEN CONSUMABLES**
 (million dollars)

Item	2001	2006	2011	2016	2021
Government Spending (bil \$)	1,000	1,100	1,200	1,300	1,400
\$ consumables/mil \$ spending	0.0001	0.0001	0.0001	0.0001	0.0001
Government/Institutional Consumables	60	70	80	90	100
Fertilizer					
Pesticides					
Seeds					
Mulch					
Growing Media					
Other					
% government & institutional Total Lawn/Garden Consumables	6%	7%	8%	9%	10%



COMPANY PROFILES

Espoma Company
 6 Espoma Road
 Millville, NJ 08332
 856-825-0542
 http://www.es

Annual Sales
Employment:

Key Products : mixes, soil amendments : pesticides

SAMPLE PROFILE

Espoma Company is a privately held manufacturer and marketer of natural organic plant foods for the lawn and garden industry. The Company also supplies specially blended plant foods and individual organic nutrients to professional and home gardeners. Espoma's products are manufactured at the Company's plant in Millville, New Jersey, and primarily distributed through garden centers in the eastern US.

The Company is active in the US lawn and garden consumables industry through the production of natural and organic products for the consumer and professional gardening markets. These products include such lawn and garden consumables as plant foods, potting mixes, soil amendments and nutrients, microbial products, and pesticides.

Among Espoma's natural and organic plant foods are HOLLY-TONE, PLANT-TONE, FLOWER-TONE, ROSE-TONE, BULB-TONE, GARDEN-TONE, TOMATO-TONE, CITRUS-TONE, TREE-TONE, PALM-TONE, and GRO-TONE offerings. These products utilize the Company's BIO-TONE beneficial microbes formulated to enhance plant growth. For example, HOLLY-TONE plant food is designed for hollies, azaleas, dogwoods, evergreens, rhododendrons, and

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"Demand for lawn and garden consumables in the government and institutional market is expected to rise 3.2 percent annually to \$341 million in 2016, an improvement over the 2006-2011 period, which included the recent economic downturn. Government and institutional markets for lawn and garden consumables include government properties, military bases, schools, churches, parks, hospitals, prisons, and athletic fields."
 --Section IV, pg. 124

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OTHER STUDIES

Home & Garden Pesticides

US demand for home and garden pesticides is projected to increase 3.2 percent per year to \$2.3 billion in 2016. Insecticides and fungicides will be the fastest growing types. Household applications will outpace lawn and garden uses, promoted by increased awareness of pest-borne diseases and by continued problems with aggressive insects. This study analyzes the \$2 billion US home and garden pesticide industry, with forecasts for 2016 and 2021 by product, application and raw material. The study also evaluates company market share and profiles industry players.

#2947 October 2012 \$4900

World Agricultural Pesticides

World demand for formulated agricultural pesticides is forecast grow 3.8 percent annually through 2016 to \$59 billion. The fastest growth is expected in developing countries of Eastern Europe, South America, and Asia. Product demand will benefit from more value-added pesticide formulations with multiple active ingredients. This study analyzes the \$49 billion world agricultural pesticide industry, with forecasts for 2016 and 2021 by product, market, world region and for 43 countries. The study also evaluates company market share and profiles industry participants.

#2902 August 2012 \$6200

Agricultural Equipment in China

Demand for agricultural equipment in China is projected to grow 10.8 percent annually to 225 billion yuan in 2015, driven in part by favorable government policies and improved access to equipment through cooperatives. Farm tractors will remain the largest segment while planting and fertilizing machinery and harvesting machinery grow the fastest. This study analyzes the 134.6 billion yuan agricultural equipment market in China, with forecasts for 2015 and 2020 by product and region. The study also evaluates company market shares and profiles market participants.

#2880 March 2012 \$5400

Outdoor Furniture & Grills

US demand for outdoor furniture and grill products is expected to rise 4.0 percent annually to nearly \$7 billion in 2015. The grill and related accessories segment will see the fastest growth, followed by the larger outdoor furniture and accessories segment. An expected rebound in the housing market will offer opportunities in the dominant residential sector. This study analyzes the \$5.7 billion US outdoor furniture and grill industry, with forecasts for 2015 and 2020 by product, market and region. The study also evaluates company market share and profiles industry players.

#2828 January 2012 \$4900

Landscaping Products

US demand for landscaping products is projected to increase 7.6 percent per year through 2015, as sales post a strong improvement from a reduced 2010 base. Concrete products and other hardscapes will see the fastest growth, while decorative products (e.g., water features, lighting, bird and wild animal products) remain the largest segment. This study analyzes the \$4.1 billion US landscaping product industry, with forecasts for 2015 and 2020 by product, market, end use and US region. The study also evaluates company market share and profiles industry players.

#2747 June 2011 \$4900

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