



[CLICK TO VIEW](#)

[Table of Contents 2](#)

[List of Tables & Charts 3](#)

[Study Overview 4](#)

[Sample Text, Table & Chart 5](#)

[Sample Profile, Table & Forecast 6](#)

[Order Form 7](#)

[About Freedonia, Custom Research, Related Studies, Corporate Use License 8](#)

Landscaping Products

US Industry Study with Forecasts for **2013 & 2018**

Study #2488 | April 2009 | \$4700 | 229 pages

www.freedoniagroup.com



The Freedonia Group

767 Beta Drive

Cleveland, OH • 44143-2326 • USA

Toll Free US Tel: 800.927.5900 or +1 440.684.9600

Fax: +1 440.646.0484

E-mail: info@freedoniagroup.com

Table of Contents

EXECUTIVE SUMMARY

MARKET ENVIRONMENT

General	4
Macroeconomic Overview	5
Demographic Trends	9
Consumer Income & Spending Trends	12
Personal Income & Spending	13
Consumer Financing	14
Construction Trends	18
Building Construction Trends	22
Residential Construction	25
Housing Completions	27
Housing Stock	31
Housing Sales	35
Residential Improvement & Repair	36
Nonresidential Construction	37
Construction Expenditures	38
Nonresidential Improvement & Repair	40
Nonresidential Building Stock	41
Nonbuilding Construction	44
Golf Course Outlook	46
Landscaping & Lawn Care	
Industry Outlook	48
Landscaping & Gardening	
Market Overview	50
Pricing Issues	53
Historical Market Trends	55
Environmental & Regulatory Issues	57
Environmental Issues	57
Clay Brick	58
Concrete Products	59
Wood	59
US-Canadian Softwood Timber Dispute	61
Recycling	63
International Activity & Foreign Trade	64

PRODUCTS

General	66
Decorative Products	68
Water Features	70
Lighting	72
Applications	74
Types	76

Bird & Wild Animal Products	78
Pots & Planters	80
Other	82
Hardscape Products	85
Products	87
Concrete	88
Concrete Pavers	89
Ready Mix Concrete	90
Concrete Block & Other Concrete	91
Wood	93
Stones & Boulders	94
Clay Brick	96
Aggregates & Other	98
Applications, Markets & End Users	100
Patios	102
Walls	103
Walkways	105
Edging & Other	106
Outdoor Structures	108
Sheds	110
Gazebos	111
Arches, Trellises & Pergolas	112
Hobby Greenhouses	113
Bridges & Other Outdoor Structures	114
Other Landscaping Products	114

MARKETS & END USERS

Markets	117
Residential	118
New	121
Improvement & Repair	122
Nonresidential	124
Nonbuilding	126
End Users	129
Consumer/DIY	130
Professional	132

REGIONAL MARKETS

General	134
Regional Demographic & Economic Trends	134
Regional Population Patterns	135
Regional Economic Trends	137
Regional Housing Trends	138

Regional Landscaping Products Demand	140
Northeast	142
Midwest	143
South	145
West	147

INDUSTRY STRUCTURE

General	149
Market Share	151
Industry Restructuring	154
Competitive Strategies	157
Manufacturing	158
Marketing & Advertising	160
The Green Movement	161
Product Origination	164
Distribution Channels	165
Retail Distribution	165
Home Centers	166
Mass Merchandisers	167
Garden Centers	168
Mail-Order/Internet	169
Other	169
Professional Distribution	169

COMPANY PROFILES

Ames True Temper	171
Aquascape Incorporated	173
Berkshire Hathaway	174
Berry Plastics	176
Boral Limited	177
CEMEX SAB	180
Central Garden & Pet	182
Collier Metal Specialties	184
CRH plc	186
Deere & Company	189
Enquatics Incorporated	190
Generation Brands	192
Haddonstone Limited	193
HeidelbergCement AG	195
Henri Studio	197
Home Depot	199
Intermatic Incorporated	200
iVoice Technology	202
Kafka Granite	203
Lowe's Companies	204

(continued on next page)

[Click here to purchase online](#)

Table of Contents

COMPANY PROFILES

(continued from previous page)

Monarch Cement	205
Myers Industries	207
Oly-Ola Edgings	210
Owens Corning.....	211
Pavestone Company.....	212
Royal Philips Electronics	215
Scotts Miracle-Gro.....	218
Sears Holdings.....	220
Sure-loc Edging	221
Wal-Mart Stores	222
Wienerberger Baustoffindustrie.....	223
Other Companies Mentioned in Study	225

List of Tables/Charts

EXECUTIVE SUMMARY

1 Summary Table	3
-----------------------	---

MARKET ENVIRONMENT

1 Macroeconomic Indicators.....	9
2 Population & Households	12
3 Personal Consumption Expenditures ..	14
4 Consumer Financing Environment, 1998-2008.....	18
5 Construction Expenditures	22
6 Building Construction Expenditures...	25
7 Residential Building Construction Expenditures	27
8 Private Housing Completions	31
9 Housing Stock by Type.....	34
Cht Year of Construction of Housing Stock, 2008	34
10 Housing Sales.....	36
11 Residential Improvement & Repair Expenditures	37
12 Nonresidential Building Construction Expenditures	40
13 Nonresidential Building Improvement & Repair Expenditures	41
14 Nonresidential Building Stock	44

15 Nonbuilding Construction Expenditures	46
16 Golf Courses & Acreage	48
17 Landscaping & Lawn Care Indicators .	50
18 Lawn & Garden Product Manufacturer Sales.....	52
19 Selected Landscaping Products Prices	55
20 Landscaping Products Market, 1998-2008.....	57

PRODUCTS

1 Landscaping Products Demand by Type	67
Cht Landscaping Products Demand by Type, 2008.....	67
2 Decorative Products Demand by Type, Market & End User	69
3 Water Features Demand.....	71
4 Lighting Demand by Application & Type.....	74
Cht Lighting Demand by Application, 2008	75
Cht Lighting Demand by Type, 2008	78
5 Bird & Wild Animal Products Demand by Type & Region	80
6 Pots & Planters Demand	82
7 Other Decorative Products Demand ...	84
8 Hardscape Products Demand by Type .	87
9 Concrete Demand by Type, Application & Market.....	89
10 Wood Demand by Application & Market.....	94
11 Stones & Boulders Demand by Type, Application & Market.....	96
12 Clay Brick Demand by Application & Market.....	98
13 Aggregate & Other Hardscape Products Demand by Type, Application, & Market.....	100
14 Hardscape Products Demand by Application, Market & End User ...	102
15 Patio Demand by Product	103
16 Wall Demand by Product.....	105
17 Walkway Demand by Product.....	106
18 Edging & Other Applications Demand by Product	108
19 Outdoor Structures Demand by Product, Market & End User	110

20 Other Landscaping Products Demand by Type, Market & End User	116
--	-----

MARKETS & END USERS

1 Landscaping Products Demand by Market	118
2 Residential Markets for Landscaping Products	120
3 New Residential Market for Landscaping Products	122
4 Residential Improvement & Repair Market for Landscaping Products .	124
5 Nonresidential Markets for Landscaping Products	126
6 Nonbuilding Markets for Landscaping Products	129
7 Landscaping Products Demand by End User.....	130
8 Consumer/DIY Market for Landscaping Products	132
9 Professional Market for Landscaping Products	133

REGIONAL MARKETS

1 Population by Region	136
2 Gross Domestic Product by Region ..	138
3 Regional Housing Indicators	140
4 Landscaping Products Demand by Region	141
5 Northeast Demand for Landscaping Products	143
6 Midwest Demand for Landscaping Products	145
7 South Demand for Landscaping Products	147
8 West Demand for Landscaping Products	148

INDUSTRY STRUCTURE

1 US Landscaping Products Sales by Company, 2008.....	150
Cht US Landscaping Products Sales by Company, 2008.....	152
2 Selected Acquisitions & Divestitures	156

[Click here to purchase online](#)

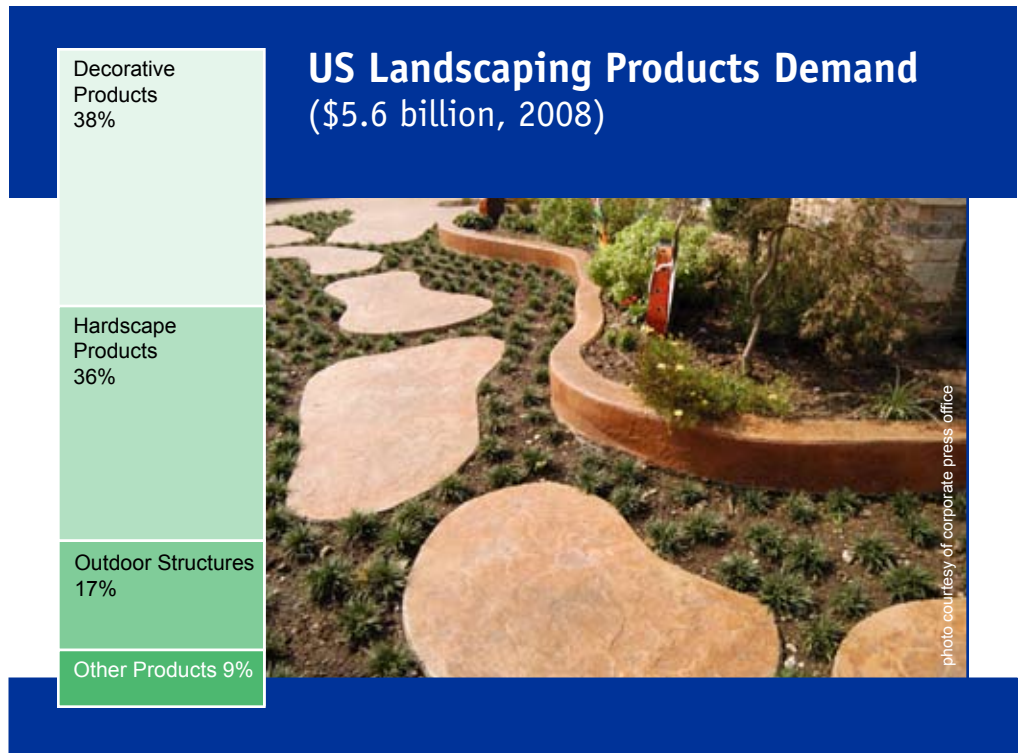
Lifestyle trends focusing on family and staying at home will benefit landscaping products as homeowners seek to maximize their home's potential, primarily by creating outdoor living spaces.

US demand to increase 6.1% yearly through 2013

US demand for landscaping products is forecast to increase 6.1 percent per year to \$7.5 billion in 2013, an acceleration from the pace set during the 2003-2008 period. Although gains are expected to be modest in the short term due to recessionary conditions, the housing market is expected to recover by 2013, creating opportunities for landscaping products. In addition, lifestyle trends focusing on family and staying at home will promote the use of landscaping products as homeowners look for ways to maximize their home's potential, primarily by creating outdoor living spaces. However, gains will be limited by a marked slowdown in the construction of nonresidential buildings. Continuing struggles in the golf industry, where growth in new course construction will weaken, will also restrict landscaping product demand.

Hardscape products, outdoor structures among best opportunities

Landscaping products include a variety of items -- decorative products, hard-scape products, outdoor structures and other products -- used to improve the appearance of lawns, vegetable and flower gardens, borders and other areas of residential, commercial or municipal properties. Gains in demand for decorative products will benefit from the relatively low market penetration of water



features (e.g., ponds and fountains), as more property owners look to these items as a way of reducing unwanted nearby noise and promoting tranquility. Product developments featuring easy installation and energy saving technology will promote demand for lighting, which is increasingly used to accent pathways, statuary, green goods and water features.

Hardscapes will continue to face competition from alternative products and structures, such as wood decking. Nevertheless, these products will experience favorable growth as consumers value the aesthetics and durability of various concrete products (e.g., pavers), and stones and boulders in the construc-

tion of patios and walkways, and surrounds for outdoor fireplaces, ponds and in-ground swimming pools.

A renewed interest in food gardening (e.g., berries, herbs and vegetables) will fuel demand for greenhouses, while other outdoor structures, such as gazebos and pergolas, will benefit from their increasing incorporation in outdoor living areas. Among other landscaping products, heating features such as chimineas will achieve the most rapid gains, as homeowners incorporate elements in their outdoor space designed to promote an oasis-like atmosphere and extend the time they can enjoy their outdoor space.

Copyright 2009 The Freedonia Group, Inc.

[Click here to purchase online](#)

Sample Text, Table & Chart

REGIONAL MARKETS

Northeast

The Northeast region consists of two subregions: New England and the Middle Atlantic. Historically, the region's economy was based on manufacturing. However, through the latter half of the 20th century and into the early years of the new millennium, manufacturing's importance decreased in importance, as many producers relocated to the South and West for lower production costs. Industries that have sprung up in manufacturing's place include high technology and financial services. In the Northeast, the shifting focus to these newer industries, the region's economy has grown faster than those of the South and West, growing 4.0 percent per year through 2008. Moreover, population growth in the Northeast will remain well above the national average.

Demand for landscaping products in the Northeast is forecast to reach \$1.5 billion, below the national average of \$1.8 billion. The region's below-average economic growth, combined with a slow population increase, will dampen growth in the landscaping industry. The industry will continue to be affected by -- with closures in the Northeast and the opening of newly constructed courses in the West and South -- further restricting opportunities in the region for landscaping products.

Although the smallest of the regions, the Northeast remains a significant market for landscaping products, accounting for over 20 percent of total demand in 2008. Offsetting the negative growth factors will be the region's high per capita landscaping product spending, the highest in the nation. Although the region experiences harsh winters, a significant amount of money is spent in order to enjoy the outdoors during the rest of the year. The freeze/thaw cycle that accompanies the change in seasons also impacts which materials are best suited for landscaping products. In edging, for example, plastic items are better able to handle

TABLE III-2

DECORATIVE PRODUCTS DEMAND BY TYPE, MARKET & END USER (million dollars)

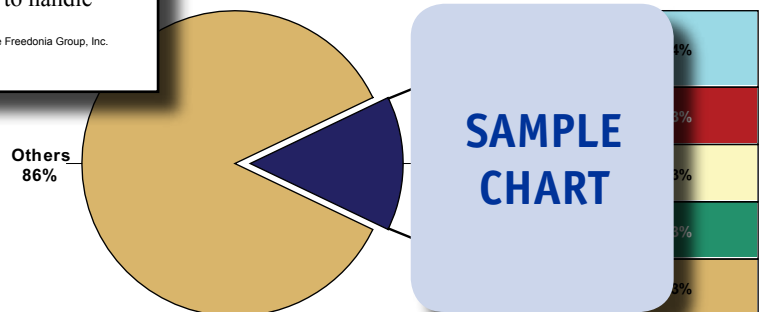
Item	1998	2003	2008	2013	2018
Resident Population (million)	235	245	255	265	275
\$ decorative products/capita	10	11	12	13	14
Decorative Products Demand	2,350	2,693	3,068	3,448	3,838
By Type:					
Water Features	100	110	120	130	140
Lighting	150	165	180	195	210
Bird & Wild Animal Products	200	220	240	260	280
Pots & Planters	300	330	360	390	420
Other	650	713	768	823	878
By Market:					
Residential	1,500	1,665	1,836	2,007	2,178
Nonresidential	850	928	1,008	1,093	1,180
Nonbuilding	100	100	100	100	100
By End User:					
Consumer	2,000	2,220	2,448	2,676	2,904
Professional	350	473	620	772	934
% decorative products	2	2	2	2	2
Landscaping Products Demand	500	550	600	650	700

SAMPLE TABLE

SAMPLE TEXT

CHART VI-1

LANDSCAPING PRODUCTS SALES BY COMPANY, 2008 (\$5.6 billion)



SAMPLE CHART

Sample Profile, Table & Forecast

TABLE IV-2

RESIDENTIAL MARKETS FOR LANDSCAPING PRODUCTS
(million dollars)

Item	1998	2003	2008	2013	2018
Residential Construct Expend (bil \$)					240
\$ landscaping products/000\$ expend					5
Residential Landscaping Products					20
By Type:					
Decorative Products					55
Hardscape Products					70
Outdoor Structures					10
Other					75
By Application:					
New					15
Improvement & Repair					35
% residential					1
Landscaping Products Demand	3189	4300	5000	7340	10180

**SAMPLE
TABLE**

COMPANY PROFILES

Pavestone Company LP

4835 LBJ Freeway, Suite 700
 Dallas, TX 75244
 972-404-0400
<http://www.pavestone.com>

Annual Sales:
 Employment:

Key Products: concrete pavers, edgers, and rocks

Pavestone manufactures concrete pavers and products for commercial, residential, contractor, industrial applications. The privately held Company markets its products throughout the US.

The Company is active in the US landscaping products industry through the manufacture of concrete pavers, blocks, edgers and patio stones. Pavestone also makes rocks for landscape applications.

Pavers -- Pavers from the Company are made in a variety of styles, including ADIRONDACK HERITAGE, COLONY COBBLE HERITAGE, GRASSTONE I, VILLA STONE, PLAZA STONE, SYMMETRY and VINTAGE STONE HERITAGE. ADIRONDACK HERITAGE pavers, which are offered in square and rectangular shapes, feature textured surfaces to mimic the look of cobblestone paving. Pavestone's COLONY COBBLE HERITAGE pavers have a weathered texture and are laid in a running bond pattern to give the appearance of Colonial architecture. GRASSTONE I pavers from the Company are permeable types with a honeycomb shape that allow grass and other vegetation to grow through the pavement. These pavers are suitable for soil stabilization and other applications.

"Residential demand for landscaping products is forecast to rise 8.2 percent per year to \$4.7 billion in 2013, an acceleration from the pace set during the 2003-2008 period, which was marked by a housing downturn and strained disposable income (from rising fuel and food costs, and ballooning adjustable mortgage rates, as well as job loss). While a challenging environment continued into early 2009, macroeconomic conditions are expected to improve through the remainder of the forecast period, providing opportunities for landscaping products, particularly in new housing. In addition ..."
 --Section IV, pg. 118-9

OTHER STUDIES

Wood & Competitive Decking

Although wood decking demand in the US will be flat through 2013, alternative decking will grow nearly 10% annually. Nevertheless, wood decking will continue to account for the majority of decking demand in volume and value. The residential market will remain dominant as consumers add amenities to their existing decks. This study analyzes the \$4.1 billion US decking industry, with forecasts for 2013 and 2018 by product, market and region. It also evaluates market share and profiles industry players.

#2487 04/2009..... \$4800

Green Building Materials

US "green" building material demand is projected to rise 7.2% yearly through 2013, driven mainly by a recovery of the residential market. Forest Stewardship Council (FSC)-certified lumber and wood panels, water-efficient plumbing fixtures and fittings, and energy-efficient lighting fixtures will grow at double-digit rates. This study analyzes the \$60 billion US green building material industry, with forecasts for 2013 and 2018 by type, market and region. It also considers market environment factors and profiles industry players.

#2459 02/2009..... \$4700

Fencing

US demand for fencing will reach 935 million linear feet in 2012, supported by a recovery in the residential fencing market. Plastic and composite fencing will be the fastest growing materials, as these products continue to penetrate the large residential fencing market at the expense of wood products. The Midwest and West regions will lead gains. This study analyzes the US fencing industry, with forecasts for 2012 and 2017 by product, market and region. It also evaluates market share and profiles industry players.

#2415 10/2008..... \$4600

Lawn & Garden Consumables

US demand for packaged lawn and garden consumables will grow 4.5% yearly through 2012, as baby boomers enter their peak gardening years. Best prospects include value-added products such as fast-acting and easy-to-use fertilizer, rubber and colored mulches and premium growing media. This study analyzes the \$7.5 billion US lawn and garden consumables industry, with forecasts for 2012 and 2017 by product, market, application, end user and region. It also details market share and profiles major players

#2337 05/2008..... \$4600

Brick & Block

US demand for brick and block will reach \$7.9 billion in 2012. Growth will be greatest in concrete products, reflecting stronger growth in key nonresidential building markets. Demand for clay brick will benefit from a recovery in residential building activity, especially in new single-family housing. This study analyzes the 14.2 billion unit US brick and block industry, with forecasts for 2012 and 2017 by product, market, application and US geographic region. It also evaluates company market share and profiles major players.

#2331 05/2008..... \$4500

About The Freedonia Group

The Freedonia Group, Inc., is a leading international industry market research company that provides its clients with information and analysis needed to make informed strategic decisions for their businesses. Studies help clients identify business opportunities, develop strategies, make investment decisions and evaluate opportunities and threats. Freedonia research is designed to deliver unbiased views and reliable outlooks to assist clients in making the right decisions. Freedonia capitalizes on the resources of its proprietary in-house research team of experienced economists, professional analysts, industry researchers and editorial groups. Freedonia covers a diverse group of industries throughout the United States, the emerging China market, and other world markets. Industries analyzed by Freedonia include:

- Chemicals • Plastics • Life Sciences • Packaging • Building Materials • Security & Electronics • Industrial Components & Equipment • Automotive & Transportation Equipment • Household Goods • Energy/Power Equipment

[Click here to learn more about Freedonia](#)

Freedonia Custom Research

Freedonia Custom Research delivers the same high quality, thorough and unbiased assessment of an industry or market as an industry study. Since the research initiative is based upon a company's specific needs, companies harness Freedonia's research capabilities and resources to answer unique questions. When you leverage the results of a Freedonia Custom Research engagement, you are able to obtain important answers to specific questions and issues associated with: mergers and acquisitions, new product launches/development, geographic expansion, entry into new markets, strategic business planning, and investment and funding decisions.

Freedonia Custom Research is ideal for companies seeking to make a strategic difference in the status quo and focus on future business growth. Working side by side with clients, Freedonia's team is able to define a research project that is custom-tailored to answer specific questions and provide the basis from which a company can make informed business decisions.

[Click here to learn more about Custom Research](#)



[Click here for complete title list](#)

[Click here to visit freedoniagroup.com](http://www.freedoniagroup.com)