

Report Price: £2466.89 | \$3995.00 | €3133.71

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.



The lawn and garden products market is on the rise in an improving economy as more consumers engage in discretionary projects to improve their outdoor living space. In addition, consumers are viewing lawn and garden care as an enjoyable activity with benefits rather than a chore.

# This report looks at the following areas:

- Slow, steady growth expected to continue
- · Gardening Non-enthusiasts outnumber Garden Enthusiasts
- Cost and time most common barriers for caring for lawn and garden

While a stable and improving economy and housing market points to future market growth, consumers will continue to take a price-driven approach to shopping for lawn and garden products. Going forward, creative and affordable projects, safe and healthy products, and ergonomic garden designs that are suitable for any size living space may help continue growth and appeal to a range of consumers.

# BUY THIS REPORT NOW

VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533

> Brazil 0800 095 9094

Americas +1 (312) 943 5250

+86 (21) 6032 7300

APAC +61 (0) 2 8284 8100

EMAIL: reports@mintel.com

DID YOU KNOW?

This report is part of a series of reports, produced to provide you with a more holistic view of this market



Report Price: £2466.89 | \$3995.00 | €3133.71

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

#### **Table of Contents**

#### Overview

What you need to know

Definition

#### **Executive Summary**

The issues

Slow, steady growth expected to continue

Figure 1: Total US sales and fan chart forecast of lawn and garden products, at current prices, 2010-20

Gardening Non-enthusiasts outnumber Garden Enthusiasts

Figure 2: Share of Garden Enthusiasts versus Non-enthusiasts, February 2016

Cost and time most common barriers for caring for lawn and garden

Figure 3: Barriers to caring for lawn and garden, February 2016

The opportunities

Beyond low prices and selection, expertise and inspiration could benefit retailers

Figure 4: Purchase location, February 2016

Consumers do majority of lawn and garden projects themselves

Figure 5: Lawn and garden projects, February 2016

Highlight bonding, creativity, and health benefits adults 25-44, Hispanics

Figure 6: Motivators for caring for lawn and garden, agree, by age and Hispanic origin, February 2016

What it means

The Market - What You Need to Know

Lawn and garden products market experiences growth

DIY home improvement spending on rise

More than four in 10 respondents are Gardening Enthusiasts

Improving economy, housing shifts impact market

Market Size and Forecast

Historic and projected sales for lawn and garden products

Figure 7: Total US sales and fan chart forecast of lawn and garden products, at current prices, 2010-20

Figure 8: Total US revenues and forecast of lawn and garden products, at current prices, 2010-20

Market Perspective

Spending on DIY home improvement increases, including outdoors

Figure 9: DIY improvement expenditures (\$billions), 1995-2013

Gardening Enthusiasts Market

Overview of Gardening Enthusiasts

Figure 10: Share of Gardening Enthusiasts versus Non-enthusiasts, February 2016

Figure 11: Gardening Enthusiasts participation, attitude, and skills, February 2016

BUY THIS REPORT NOW VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

APAC +61 (0) 2 8284 8100 | EMAIL: reports@mintel.com



Report Price: £2466.89 | \$3995.00 | €3133.71

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

## Lawn Care and Gardening Segments

#### Gardening Enthusiasts

Figure 12: Typical demographic of Gardening Enthusiast, February 2016

### Gardening Non-enthusiasts

#### Market Factors

## Improving economy helps lift lawn and garden category

Figure 13: Consumer Sentiment Index, January 2007-February 2016

## Stagnant homeownership rates, rental rates increase

Figure 14: Homeownership rate, by age of householder, 2014

#### Bigger homes, smaller lawns

Figure 15: Change in median home and lot size, 2009-14

### Key Players - What You Need to Know

Scotts continues to lead market, but sees decline in sales and share

Sales of select lawn and garden product brands increasing

Garden stores face hurdles

Apps, smaller products represent growth opportunity

### Manufacturer Sales of Lawn and Garden Products

Scotts leads market, but sees sales and share fall

## Manufacturer sales of lawn and garden products

Figure 16: MULO sales of lawn and garden products, by leading companies, rolling 52-weeks 2014 and 2015

## What's Flourishing?

## Problem specific products

Figure 17: MULO sales of lawn and garden products, by leading companies and brands, rolling 52-weeks 2014 and 2015

## Simplicity and humor: Effective marketing for retailers

Figure 18: "LowesFixInSix," online Vine video, December 18, 2015

## Fresh, organic foods enabling healthy living and yard-to-table trend

# What's Dying?

# Central Garden & Pet losing share

Figure 19: MULO sales of Central Garden & Pet, by leading companies and brands, rolling 52-weeks 2014 and 2015

## Specialists, garden stores face challenges

## Fertilizers, soils, seeds

Figure 20: MULO sales of select lawn and garden products, by leading companies and brands, rolling 52-weeks 2014 and 2015

### What Will Be Growing?

## Want to improve the lawn or garden? There is an app for that!

Figure 21: Interest in technology for lawn and garden, agree, by age, Hispanic origin, and parents, February 2016

### Subscription services for the garden

Gardening for urbanites: Bringing the outdoors in

BUY THIS REPORT NOW VISIT: store.mintel.con

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

APAC +61 (0) 2 8284 8100



Report Price: £2466.89 | \$3995.00 | €3133.71

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Figure 22: Terrarium image

#### The Consumer - What You Need to Know

Age, living situation, and lifestyle influence lawn and garden trends

Most lawn and garden projects are DIY

Big-box home centers offer convenience, but lack expertise

Price is the most important factor when shopping the category

Home value and health benefits motivate participants

Money, time are the most common challenges for consumers

## Lawn and Garden Participation, Attitudes, Skills

### Most enjoy regularly caring for lawn and garden

Figure 23: Lawn and gardening participation, attitudes, and skill, February 2016

### Lawn and garden: Men slightly more engaged than women

Figure 24: Lawn and gardening participation, by gender, February 2016

Figure 25: Lawn and gardening attitudes, by gender, February 2016

Figure 26: Lawn and gardening skill, by gender, February 2016

#### Adults aged 25-44, parents establish place in the category

Figure 27: Lawn and gardening participation, by age and parental status, February 2016

Figure 28: Lawn and gardening attitudes, by age and parental status, February 2016

Figure 29: Lawn and gardening skill, by age and parental status, February 2016

## Hispanics represent important lawn and garden group

Figure 30: Lawn and gardening participation, by race and Hispanic origin, February 2016

Figure 31: Lawn and gardening attitude, by race and Hispanic origin, February 2016

Figure 32: Lawn and gardening skill, by race and Hispanic origin, February 2016

### Lawn and Garden Activities

### Lawn and garden care more likely to be DIY than by professionals

Figure 33: Lawn and garden activities, February 2016

### Adults aged 25-44 doing work themselves

Figure 34: Select lawn and garden activities done themselves, by age, February 2016

### Older adults, Hispanics willing to spend for professional services

Figure 35: Select lawn and garden activities done by hired professional, by age and Hispanic origin, February 2016

### Gardening Enthusiasts take on more DIY lawn and garden projects

Figure 36: Lawn and garden activities done themselves, by all and Garden Enthusiasts, February 2016

## **Purchase Locations**

## Big-box home centers dominate lawn and garden retail

Figure 37: Purchase locations, by all and Garden Enthusiasts, February 2016

### Older consumers want the experts

Figure 38: Purchase locations, by age, February 2016

Hispanics, Blacks seek convenient locations



VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

APAC +61 (0) 2 8284 8100



Report Price: £2466.89 | \$3995.00 | €3133.71

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Figure 39: Purchase Locations, by race and Hispanic origin, February 2016

#### **Purchase Factors**

#### Price weighs on cost-conscious consumers

## Brand recognition important to lawn and garden equipment shoppers

Figure 40: Purchase factors for lawn and garden equipment and tools, February 2016

## Safety features a priority for lawn and garden care products

Figure 41: Purchase factors for lawn and garden care, February 2016

#### Care requirements, visual impact are key for plant purchasers

Figure 42: Purchase factors for trees, plants, and bushes, February 2016

#### Adults aged 25-44, Hispanics look for environmental and safety benefits

- Figure 43: Select purchase factors for lawn and garden equipment or tools, by age and Hispanic origin, February 2016
- Figure 44: Select purchase factors for lawn and garden care, by age and Hispanic origin, February 2016
- Figure 45: Select purchase factors for trees, plants, and shrubs, by age and Hispanic origin, February 2016

### Gardening Enthusiasts are willing to put in time and effort for quality

Figure 46: Select purchase factors among Garden Enthusiasts, February 2016

#### Lawn and Garden Motivations

#### Health benefits and curb appeal motivate most participants

Figure 47: Lawn and gardening motivations, agree, February 2016

## 25-44's, Hispanics bonding over activities; planning future projects

Figure 48: Select lawn and gardening motivators, agree, by age, February 2016

Figure 49: Select lawn and gardening motivators, agree, by Hispanic origin, February 2016

### Appeal to Gardening Enthusiasts with customizable projects

Figure 50: Select lawn and garden motivations, among Garden Enthusiasts, February 2016

### Are renters less motivated to garden?

Figure 51: Select lawn and gardening motivations, agree, by primary residence, February 2016

### Lawn and Garden Barriers

### Cost, time are top barriers for consumers

Figure 52: Barriers for lawn and garden activities, February 2016

### Space constraints, lack of knowledge challenge younger adults

Figure 53: Select barriers for lawn and garden activities, by age, February 2016

### Hispanics concerned about chemicals, overwhelmed

Figure 54: Select barriers for lawn and garden activities, by Hispanic origin, February 2016

## Appendix - Data Sources and Abbreviations

Data sources

Sales data

Fan chart forecast

Consumer survey data

Consumer qualitative research



VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

APAC +61 (0) 2 8284 8100 EMAIL: reports@mintel.com



Report Price: £2466.89 | \$3995.00 | €3133.71

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Abbreviations and terms

Abbreviations

Appendix - Market

Figure 55: Total US revenues and forecast of lawn and garden products, at inflation-adjusted prices, 2010-20

Appendix – Key Players

Figure 56: MULO sales of lawn and garden products, by leading companies and brands, rolling 52-weeks 2014 and 2015

Appendix - Consumer

CHAID methodology

Correspondence methodology

**Purchase Factors** 

Figure 57: Correspondence Analysis – Purchase factors, February 2016

Figure 58: Purchase factors, February 2016

APAC +61 (0) 2 8284 8100 | EMAIL: reports@mintel.com