

Lawn and Garden Products - US - 2023

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This report looks at the following areas:

- Market performance
- Brand innovation and market opportunities
- Consumer participation in lawn and garden care
- Types of lawn and garden tasks undertaken and use of professional contractors
- Retail channels
- Consumer attitudes and behaviors

When the pandemic struck, lawn and garden products saw such strong demand, that for much of 2020 and 2021, the market was defined by supply shortfalls caused by consumers seeking a safe, at-home pastime. Now, as people return to their pre-pandemic lifestyles, per capita sales are down, but paradoxically, category participation continues to tick upward, from 49% in 2022 to 51% in 2023. That's good news for long-term category health.

Brands are at a crossroads. On the lawn side of the business, regulatory restrictions on watering; and even mandates to remove some grass in the most water-stressed parts of the country; represent a palpable threat that could thwart the notable progress around drought and heat-tolerant grass variants. 47% believe that lawns require too much water, and 83% say that native plants are better for the environment.

With that in mind, it has never been more important to have a diversified portfolio to hedge against threats in both the lawn and garden sides of the market. Increasingly, consumers see gardening as a pastime that delivers both financial and emotional rewards. Many are growing their own food to offset high prices at the grocery store, but consumers also acknowledge the emotional benefits of a garden. 85% see gardening as a form of creative expression. Brands need to promote these benefits if they're going to sustain pandemic-driven momentum over the long-term.



"Participation lawn and garden work burgeoned during the pandemic. That triggered enormous market growth, from 4.9% in 2019 to 21.9% in 2021. Since then, growth has tempered, but remains historically high, in part due to inflation, but also sustained consumer involvement."

– Jamie Rosenberg, Associate Director, Global Household and Personal Care

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Table of Contents

OVERVIEW

- **What you need to know**
- **This Report looks at the following areas**
- **Definition**
- **Market context**

EXECUTIVE SUMMARY

- **Top Takeaways**
- **Consumer trends**
- **Competitive strategies**
- **Market leaders are rebuilding after a down year**

Figure 1: Consumers who are replacing lawn with garden, and those who are growing more vegetables due to inflation, by age, 2023

Figure 2: SMG's sponsorship of Martha Gardens on Roku

- **The need to save water means grass alternatives gain steam**

Figure 3: Attitudes towards native plants and lawn watering, 2023

- **Market predictions and opportunities**
- **Market Overview**

Figure 4: Total US sales and fan chart forecast of lawn and garden products, at current prices, 2018-28

Figure 5: Category outlook, 2023-28

MARKET SIZE AND FORECAST

- **Pandemic momentum remains strong**

Figure 6: Total US sales and fan chart forecast of market, at current prices, 2018-28

Figure 7: Total US sales and forecast of lawn and garden products, at current prices, 2018-28

MARKET DRIVERS

- **Inflation shows a meaningful decline**

Figure 8: Consumer Price Index change from previous period, 2007-2023

- **Consumer confidence gets a boost**

Figure 9: Consumer Sentiment Index, 2007-2023

MARKET SHARE

- **SMG is the leader, but smaller competitors are gaining**
- **Sales of lawn and garden products by company**

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Executive Summary

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Figure 10: Sales of market, by company, year and year

COMPETITIVE STRATEGIES AND MARKET OPPORTUNITIES

- SMG rebuilds after a down year**
 Figure 11: Scotts Turf Builder Grass Seed and image from SMG’s Water Positive campaign
 Figure 12: SMG’s sponsorship of Martha Gardens on Roku
 Figure 13: Image from GrowMoreGood refugee kids gardening program
- SMG’s Hawthorne subsidiary slides as the cannabis bubble bursts**
- Spectrum sees a dip in sales, but also an influx of divestiture cash**
- Alternatives to grass tout convenience and water conservation**
 Figure 14: Attitudes towards native plants and lawn watering, 2023
 Figure 15: An example of a desert-friendly front yard
- Artificial turf brands tout low-maintenance and water conservation**
 Figure 16: Artificial turfs from NexGen and TrafficMaster

THE LAWN AND GARDEN CONSUMER – FAST FACTS

- Gardening participation has grown since the onset of the pandemic**
- Nearly half love gardening**
- Inflation may be steering consumers away from pros**
- Wealthy shoppers are more likely to be omnichannel shoppers**
- Attitudes highlight the opportunity of enablement**
- Chemical concerns shouldn’t be ignored**

LAWN AND GARDEN PARTICIPATION

- Nearly one third care for their lawn weekly, while 27% are frequent gardeners**
 Figure 17: Lawn and garden participation, 2023
- Gardening participation has grown since the onset of the pandemic**
 Figure 18: Occasional vs frequent gardening participation, by year, 2020–2023
- Millennial men should be a prime target for garden brands**
 Figure 19: Frequent gardeners, by generation and gender, 2023

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- Executive Summary
- Full Report PDF
- Infographic Overview
- Powerpoint Presentation
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LAWN AND GARDEN ENJOYMENT

- Nearly half love gardening**
 Figure 20: Gardening level of enjoyment, 2023
- Enjoyment continues to tick upward**
 Figure 21: Consumers who love gardening
- Enjoyment aligns with participation**
 Figure 22: Gardening enjoyment, by generation and gender
 Figure 23: Consumers who love gardening vs. those who are frequent gardeners, by gender and parental status, 2023

LAWN AND GARDEN SKILL

- Consumers report similar skill levels for lawn care and gardening**
 Figure 24: Lawn and garden skill level
- Men claim higher skill across all age groups**
 Figure 25: Lawn and garden skill level, by generation and gender, 2023
- Consumer skill spiked in 2020, declined in 2022 and spiked again in 2023**
 Figure 26: Consumers with at least intermediate lawn and gardening skill, by year, 2020-2023

USE OF PROFESSIONALS

- Figure 27: Use of lawn and garden professionals, by task, 2023
- Inflation may be steering consumers away from pros**
 Figure 28: Use of lawn and garden professionals, by task, and year, 2020-23
- Many consumers view hiring pros as an investment**
 Figure 29: Reasons for using professionals, 2023
- Young consumers are the most chemical-adverse**
 Figure 30: Consumers who use professionals to reduce their chemical exposure, by age, 2023

PURCHASE LOCATIONS

- Ecommerce, nurseries and mass merchandizers see the biggest gains**
 Figure 31: Purchase locations for lawn and garden products, 2020-2023
- Wealthy shoppers are more likely to be omnichannel shoppers**
 Figure 32: Consumers who are heavy ecommerce and garden store shoppers, by age and income, 2023

What's included

- Executive Summary
- Full Report PDF
- Infographic Overview
- Powerpoint Presentation
- Interactive Databook
- Previous editions

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LAWN AND GARDEN BEHAVIORS

- **Consumers realize the ROI of gardening, but they need help**

Figure 33: Lawn and garden behaviors, 2023

Figure 34: Frequent gardening, by income, 2023

ATTITUDES TOWARD LAWN AND GARDEN WORK

- **Survey data shows the importance of enablement**

Figure 35: Attitudes toward lawn and garden work, 2023

- **Chemical concerns shouldn't be ignored**

Figure 36: Consumers concerned about lawn chemicals, by parental status, 2023

- **Lawns are at the center of water concerns**

Figure 37: Consumers who believe lawns require too much water, by age and gender, 2023

APPENDIX – DATA SOURCES AND ABBREVIATIONS

- Data sources
- Sales data
- Forecast
- Consumer survey data
- Abbreviations and terms
- Abbreviations

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Executive Summary

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Powerpoint Presentation

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