Powered Gardening Tools Continue To Decline In Europe

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Although the DIY market is developing relatively well in Europe, the total European sales value for Powered Gardening tools has been in continuous decline for the past few years.

The following analysis from GfK Retail and Technology is based on four European countries, Germany, France, UK, and the Netherlands, and focuses on DIY Superstores.

Despite the economic crisis, the DIY market has been developing at a healthy rate; people are deciding to invest in their homes and gardens in favor of spending money on travelling. While other industries have struggled in recent years, according to GfK Retail and Technology, the European gardening market, including Garden Watering/Cleaning, Garden Hand Tools and Powered Gardening Tools has continued to demonstrate steady growth rates within DIY superstores, despite declines in the Powered Gardening category.

Over the last five years, Garden Watering and Hand Tools have showed constant sales value increases while the total market share of powered gardening declined in the European DIY market. As a result of this shift, Garden Watering and Hand Tools are now, in total, on the same sales value level as Powered Gardening Products in European DIY Superstores.

When looking at this trend, it is clear to see that each country is developing differently. Germany for example, which accounts for 41% of the total turn-over of the European market (Germany, France, UK and Netherlands) for Powered Gardening, has seen a decrease in sales value over the last five years, while France and the Netherlands have experienced more positive performances within this market. The UK market for powered products has seen poor development and now has a share of around 22% (sales value) for the total European market.

Regarding the top five selling products groups in Powered Gardening, Powered Lawnmowers have the largest market share in terms of value. This product group accounts for nearly 50% of the European market and is followed by Powered Hedge Trimmers, Trimmers/Brush Cutters, Powered Chain Saws, Powered Scarifiers etc.

A closer look at the development of each product group shows that all top gardening product groups, except the Powered Hedge Trimmers, had negative trends in value over the last five years in Europe. Within the market for Powered Hedge Trimmers, light, user-friendly Cordless products were pushing the market.

In spite of the negative developments in the market for Powered Gardening Tools, the average price of these products within the European market has seen a continuous increase. In line with this trend is the fact that keen gardeners are now willing to spend more money on branded, innovative and quality products. This was especially visible in France, Germany and the Netherlands, where the top five brands in the market are growing well.

Since 2007 in the UK, the top five brands have witnessed a drop in sales value, but if compared with other brands, the decrease is only minor. If the market is divided by price, the high end segment is performing particularly well in Europe with above EUR 380 demonstrating sound performances.

One reason for the positive development within the segment of high priced products is the increasing demand for innovative Cordless Powered Gardening items (e.g. Lawn mowers with Lithium Ion technology), which are generally more expensive. The strong demand for this technology is clear to see in all audited countries, especially in France and Germany.

When looking at other technologies, such as Powered Corded and Petrol Driven Powered Gardening Tools, it is evident that the market is declining. Looking at the overall European gardening market, Cordless Powered Garden technologies nearly doubled from 5% (rolling year 2007/2006) to 9% (rolling year 2010/2011).

While Petrol Powered Gardening tools have maintained approximately the same level of market share in the last five years, corded products lost market share to cordless products.

Looking at the average price development of cordless products since 2007, it has increased by around 25%. This development is primarily because Lithium Ion technology has allowed manufacturers to launch lighter and more powerful products at higher prices.

This overview of the European market for Powered Gardening Tools has shown that in total, the market is declining. However, there are some signs of growth ahead for manufacturers and retailers; cordless technology and the user friendliness of products will be the key drivers of the European Powered Gardening Tools market in the future.

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