Horticultural Retailing Market Report 2015

Description: This market report examines the horticultural retailing market in the UK, covering growing stock (such as seeds, bulbs, plants, trees, shrubs); garden assets, buildings and furniture; garden tools and equipment (including lawnmowers and power tools); and garden care products (such as fertiliser, pesticides and compost). The report excludes sales in the commercial sector.

The economic downturn in 2008 and the recession that followed have had a prolonged and devastating impact on the retail sector, including the market for horticultural retailing. In 2012, retail sales of horticultural products declined by 2.4% and stagnated in the following year; however, the market rebounded in 2014 thanks to mild weather that year, with sales rising by an estimated 0.9%. By sector, the market for growing stock is the largest, making up an estimated 46.7% of the total retail sales of horticultural products in 2014. It was followed by the market for garden assets, buildings, furniture and ancillaries, at 31.1%. Garden tools and equipment, as well as garden care products, made up the remaining 22.2% of the total sales.

Retail sales of growing stock grew by 1.5% between 2010 and 2014, with plants, trees and shrubs being the largest segment within this sector, accounting for 47.2% of total sales for growing stock in 2014. The subsector for houseplants is the second largest within the growing stock sector, at 32.4%. By contrast, the garden assets, buildings, furniture and ancillaries sector, which comprises many big-ticket items such as garden sheds, patios, garden furniture, has been hit by the economic downturn more than other less costly items. Over the 5-year review period, retail sales of these products decreased by 5.5%.

Despite the challenging economic climate and adverse weather conditions, the UK is still considered to be made up of a nation of gardeners, with many people growing plants on their balconies or roofs if they have no garden. The increasing number of older people and the trend towards outdoor living and grow-your-own vegetables and fruit should ensure a fairly stable future for the horticultural retailing sector over coming years.

This report forecasts retail sales of horticultural products will increase year-on-year over the next 5 years, by 4.9% overall. However, sales of certain products will fluctuate with changing weather conditions. Growth is expected in most sectors, thanks to a steady economic recovery and increased consumer spending. The strongest growth will be witnessed in the growing stock sector, which is expected to increase in value by 5.8% between 2015 and 2019.

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Agrovista UK Ltd
Blue Diamond UK Ltd
DJ Squire and Co Ltd
Dobbies Garden Centres Ltd
Everris Ltd
Notcutts Ltd
Westland Horticulture Ltd
William Strike Ltd
Wyevale Garden Centres

OUTSIDE SUPPLIERS
Growing Stock
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