



# Market Update: September 2023

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# Overview: Key Points



**Overall  
August  
Garden Centre  
sales were up  
+3% vs August  
2022**

**Catering sales  
were  
up +26%  
on August 2022**

**Consumer  
confidence  
climbed +5  
points to -25 in  
August**

August 2023  
saw **1.8 times**  
more rain days  
vs August 2022

**Garden  
furniture sales  
were  
down -42%  
compared  
with  
August 2022**

# Overview: the story this month



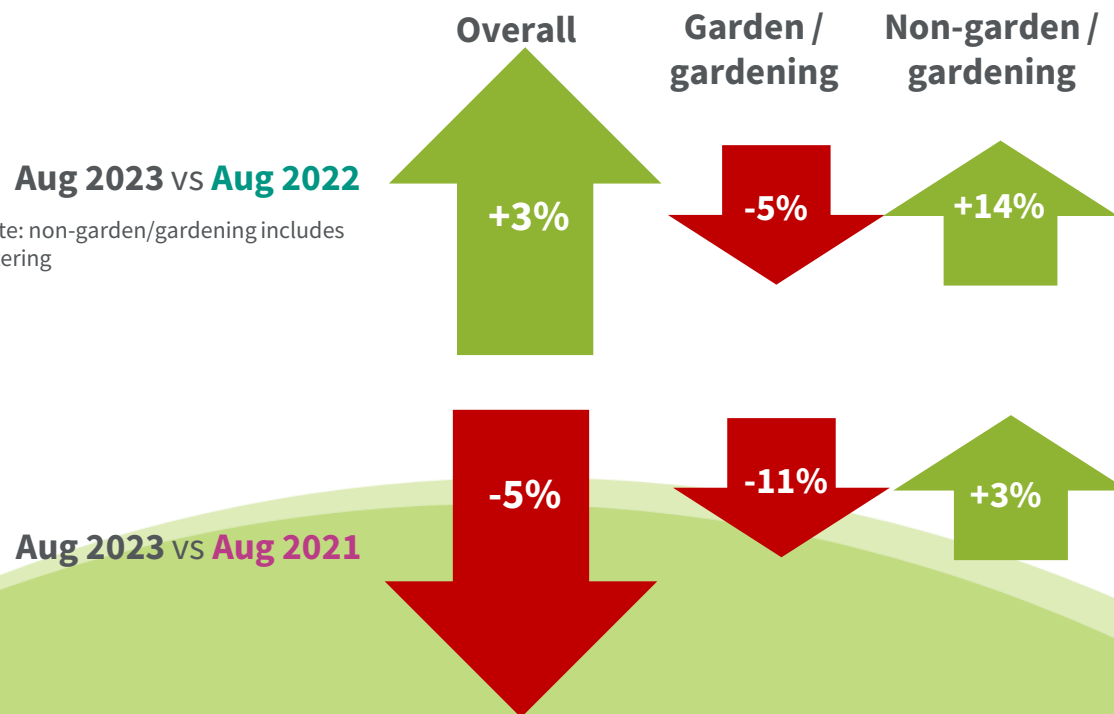
- The trend of uncertain weather continued in August as we saw another rainy and dull month, with almost 2 times the amount of rain days compared to August last year.
- Following the lifting of the Temporary Use Bans (TUBs) in the beginning of August in Sussex and Kent, August's rainfall contributed to the decision to lift bans in Cornwall and parts of North Devon on 25<sup>th</sup> September. Further information regarding the water situation can be found on page 17.
- Despite the wet weather, overall garden sales were up by +3% compared to August 2022. Overall transaction numbers (exc. VAT) were up by +8% suggesting footfall was stronger than last year. But sales were down -5% compared to August 2021 where the increase in gardening during Covid was observed.
- Garden/gardening sales were down -5% compared to August 2022. The pattern remained similar to July 2023, seeing strong plant sales but wet weather dampening outdoor leisure sale categories and heavier than usual discounting on garden furniture as retailers shifted excess stock.
- On the contrary, non-garden/gardening categories did well, up +14% on August last year, mainly driven by continued strong performance in the cafes and restaurants. Meanwhile, calendar year to the end of August comparisons for overall sales remained at +1% from July and June.
- Average Transaction Values (ATVs) were down -5% within the garden store to £25.41 (exc. VAT), reflecting a change in the basket from higher value leisure items to more plants of relatively lower value. However, ATVs in Catering were up +7%, with high levels of food price inflation but also increased footfall into the restaurants and cafes for treats, with sales volumes at +9% compared to August 2022.
- August's Consumer Confidence Index recovered +5 points, showing consumers have more positivity for their future financial outlook (page 17). With the effects of climate change being very hard to ignore with wildfires in Europe, climate change climbed to 3<sup>rd</sup> spot in Ipsos' Issue index, more on this on page 19.
- We are more than halfway through an unpredictable year, footfall and demand for plants look strong going into the Autumn Gardening season.

Read on for the detail...

# Garden centre sales: August



In August, overall garden centre sales were up +3% in comparison to August 2022, but down -5% in comparison to August 2021. Garden/Gardening category sales were down -5% on August 2022 and -11% compared with August 2021, as wet weather continued to lower demand for outdoor leisure categories. To compensate, non-garden/gardening sales were up +14% in comparison to August 2022, continuing to strengthen in the poor weather. Nevertheless, goods sold in garden centre restaurants continue to see the effects of inflation. For further insights on this, please read on to page 6.



## How are these figures calculated?

The national sales figures we report each month come from the HTA Garden Retail Monitor (GRM) system. We've now moved over to a newer GRM system where sales data from submitting garden centres is automatically uploaded to a secure server via the EPOS system. These garden centres can then login to the portal to benchmark their sales against regional and national averages for a variety of sales metrics. We're looking to sign up more garden centres to the system, allowing us to include more reliable detailed breakdowns of trends in sales in these Market Update reports.

If you're interested or for more information visit:  
[hta.org.uk/grm](https://hta.org.uk/grm)

(Figures reported are exclusive of VAT)

# Garden centre sales volumes: Aug

Due to the high levels of price inflation in the current economic climate, we report on the quantity of goods sold in addition to sales values, to assess the level to which year-on-year comparisons are reflective of end-goods price increases or change in demand. As detailed on page 5, overall sales last month were up +3%, however volume of sales were up +6%, which suggests that goods were sold at slightly higher volumes or were goods of lower relative value. For example, in August 2022, garden furniture made up 14% of total sales, but only made up 8% in August 2023. Within the garden/gardening category, sales were down -5% by value and up +3% by volume, with plants continuing to perform well (see page 9). When looking at August 2021 comparisons, we see inflation have more of an impact once again. For example, garden/gardening sales in August 2023 were down -18% on 2021 in volume terms as more gardened during COVID, but only -11% down by value. Read more about inflation on garden centre products on pages 20 and 21.

Aug 2023 vs Aug 2022	Overall	Garden/gardening	Non-garden/gardening
Value of sales (£, exc. VAT)	+3%	-5%	+14%
Volume of sales	+6%	+3%	+9%

Aug 2023 vs Aug 2021	Overall	Garden/gardening	Non-garden/gardening
Value of sales (£, exc. VAT)	-5%	-11%	+3%
Volume of sales	-7%	-18%	+2%

# August Transaction Numbers and Average Transaction Values (ATVs): In the Garden Store

Transaction numbers for the Garden Store were +5% versus August 2022, indicating increased footfall into the store versus last year. However, transaction numbers fell -7% versus August 2021 as the role of the garden centre during covid versus August 2023 has changed, with garden centres being one of the only places you could visit during restrictions. The Average Transaction Value (ATV) for August was £25.41 in the garden store, down -5% on the same time last year. Investigating further, garden furniture sales were down by -42% on last year and contributed to 8% of total sales for August, compared to 14% in August 2022. Throughout 2023, we have seen heavier than usual discounting as retailers try to shift excess furniture stock; Covid also pulled forward the product replacement cycle for these items and the poorer summer 2023 weather are likely all contributing to a lower average basket value.

## Transaction Numbers: Garden Store



## Average Transaction Values (ATVs): Garden Store

exc. VAT  
**£ 25.41**  
 inc. VAT  
**£ 29.79**  
 AUG 2023

VS AUG 2022 (exc. VAT)	VS AUG 2021 (exc. VAT)
-5% (£26.77)	-2% (£25.90)

# August Transaction Numbers and Average Transaction Values (ATVs): In the café/restaurant

Transaction Numbers in the garden centre café/restaurant in August 2023 were +17% versus August 2022, demonstrating a strong footfall and demand for treats to escape the dull weather. Catering sales continued to improve, with the Average Transaction Value (ATV) for this category at £10.66, up +7% compared to August 2022, with food inflation still likely to be affecting pricing of catering goods.

## Transaction Numbers: Café/restaurant



AUG 2023 vs AUG 2022

## Average Transaction Values (ATVs): Café/restaurant

exc. VAT  
**£ 10.66**  
 inc. VAT  
**£ 12.76**  
 AUG 2023

**VS AUG  
2022  
(exc. VAT)**  
**+7%  
(£9.97)**

NB: Covid restrictions lifted completely in July 2021 (incl. Hospitality), therefore we have not included August 2021 comparisons



# Garden centre sales: detailed Aug breakdown part 1



Garden/gardening category sales overall were down -5% on August 2022. The dull and wet summer weather of 2023 continued into August having a knock-on effect on sales and requirement for outdoor leisure goods.

Bulbs were up considerably by +50% compared to August 2022. They were the strongest performer category but only contributed +1% of total sales for last month and sales were only +1% up on calendar to end of August 2023 compared to the same period in 2022. In August 2023, plant sales were particularly strong with bedding up +20% and hardy plants up +19% compared with August 2022. Year to end of August comparisons show it's been a strong year for plants with the same categories up +13% and up +12% respectively. Demand for plants were higher compared to last year, potentially due to the cooler weather making gardening easier than the heatwaves in August 2022.

Garden furniture sales were down considerably by -42% in August 2023 on August 2022 and -29% for the calendar year to end of August 2023 versus the same period in 2022. Variation in garden furniture unit pricing and discounting indicated that there is still an issue of surplus inventories for some retailers.

Category	Aug 2023 vs 2022	YTD Aug 2023 vs 2022	Aug 2023 vs 2021
Bedding plants	<b>+20%</b>	<b>+13%</b>	<b>-6%</b>
Hardy plants, shrubs & trees	<b>+19%</b>	<b>+12%</b>	<b>-5%</b>
Indoor plants	<b>+6%</b>	<b>+1%</b>	<b>-11%</b>
Seeds (excl. grass seed)	<b>+10%</b>	<b>+6%</b>	<b>+3%</b>
Bulbs	<b>+50%</b>	<b>+1%</b>	<b>+33%</b>
Plant care products	<b>+11%</b>	<b>+6%</b>	<b>-2%</b>
Garden tools & equipment	<b>-11%</b>	<b>-2%</b>	<b>-22%</b>
Garden features & structures	<b>-10%</b>	<b>-15%</b>	<b>-30%</b>
Outdoor containers	<b>-10%</b>	<b>-13%</b>	<b>-26%</b>
Garden furniture	<b>-42%</b>	<b>-29%</b>	<b>-12%</b>

YTD: Calendar year to end of August

# Garden centre sales: detailed Aug breakdown part 2

Non-garden/gardening sales were up +14% compared with August 2022, with all listed sub-categories up compared to August 2022. With the exception of indoor living and wild bird care categories, all categories were up comparing calendar year to end of August 2023 and August 2022.

Catering remained the highest performing category in the non-garden/gardening departments, up +26% on August last year and up +24% for the year to end of August 2023 versus 2022. Volumes of goods sold in the cafe/restaurant were also up +9% compared with August 2022, very much indicative of heavy price inflation but also strong demand.

Consumers continued to treat their pets, with this category up +19% in August 2023 compared with August 2022 and +7% in year to end of August 2023 comparisons against 2022. The food & farm shop category was up +16% on last August and up +9% year to end of August last year.

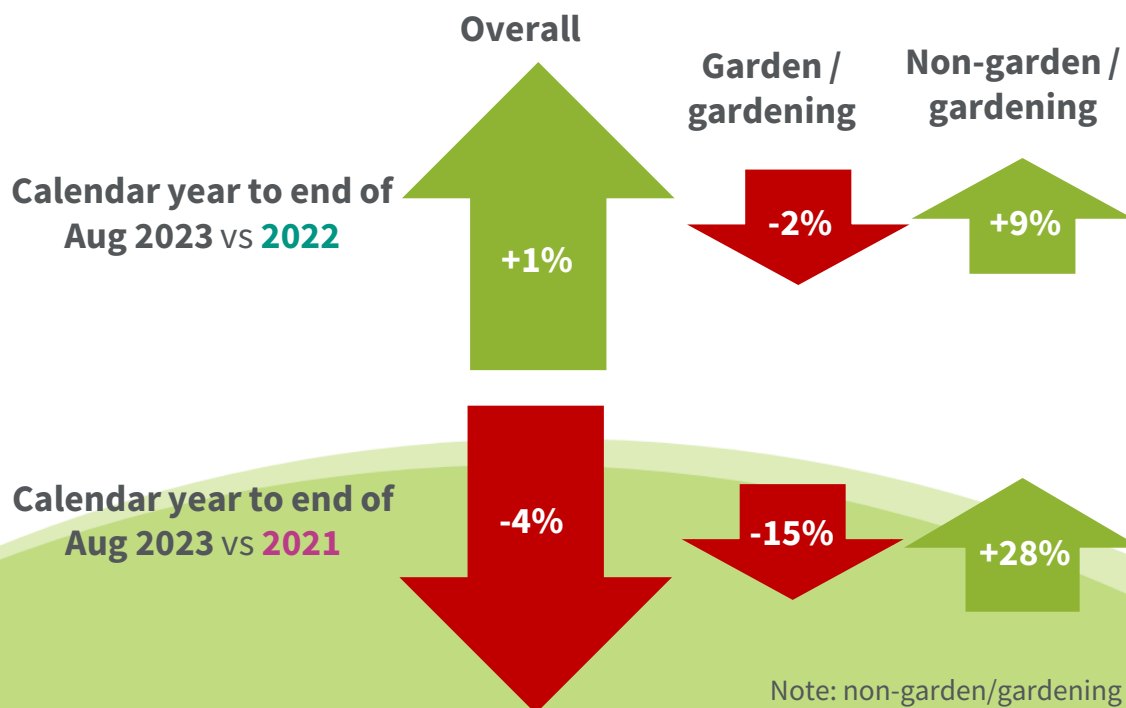
Category	Aug 2023 vs 2022	Aug YTD 2023 vs 2022	Aug 2023 vs 2021
Indoor living & homewares	<b>+2%</b>	<b>-4%</b>	<b>-18%</b>
Gifting	<b>+3%</b>	<b>+1%</b>	<b>(=)0%</b>
Wild bird care	<b>+15%</b>	<b>-4%</b>	<b>-10%</b>
Pets	<b>+19%</b>	<b>+7%</b>	<b>+6%</b>
Food & farm shop	<b>+16%</b>	<b>+9%</b>	<b>+2%</b>
Catering	<b>+26%</b>	<b>+24%</b>	<b>+22%</b>

YTD: Calendar year to end of August

# Garden centre sales: calendar year to end of August



Calendar year to end of August 2023 comparisons show that year to date (YTD) sales to the end of August were +1% versus last year. Transaction numbers were up +7%, suggesting footfall was strong but baskets were of lower value compared to last year. The garden/gardening category YTD sales were down -2% versus the same period in 2022, with the largest downward pressure coming from lower garden furniture sales. August 2023 continued the trend of dull and damp weather we've seen this year, contrasting with the warmer, sunnier summer of 2022 and reducing demand on garden leisure items. Non-garden/gardening category sales were +9% up on last year's YTD to August, as catering and food hall/farm shop departments continued to perform well. Compared with 2021, calendar year to the end of August 2023 showed lower garden/gardening YTD sales (-15%). We see non-garden/gardening category comparisons to the 2021 YTD impacted by restrictions in catering operations due to Covid.



(Figures reported are exclusive of VAT)

Note: non-garden/gardening includes catering which has faced restrictions across the UK


## How are these figures calculated?


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If you're interested or for more information visit: [hta.org.uk/grm](https://hta.org.uk/grm)

# Weather

August saw continued cooler and wetter weather, uncharacteristic of August and the last month of Summer – seeing 1.8 times the number of rain days versus August 2022. The weather was considerably cooler than last August – where we had hot weather and extended periods where temperatures reached 35 degrees in some parts of the UK. For regional variation, please see page 12.

	Aug 2023	Aug 2022
 Hours of sunshine	<b>148.1</b>	<b>208.4</b>

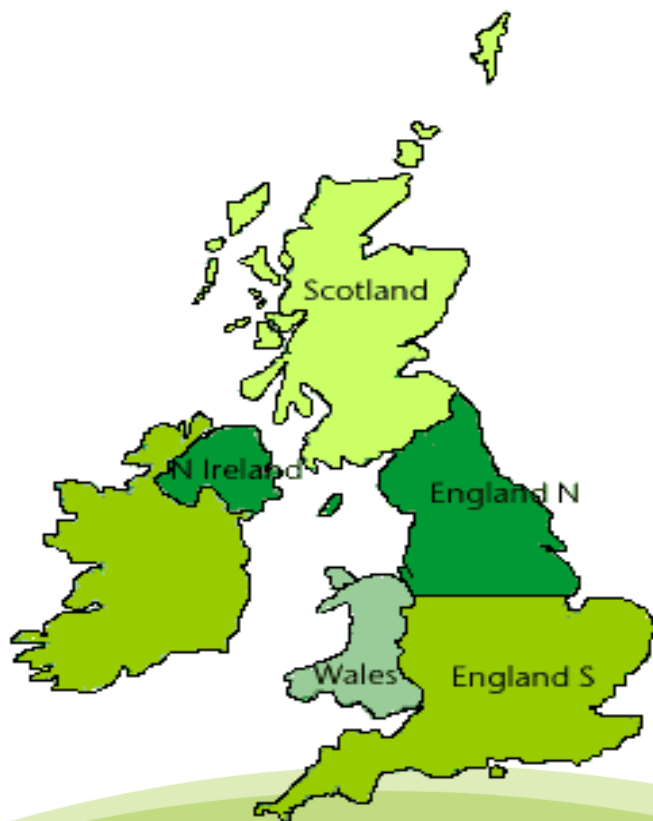
	Aug 2023	Aug 2022
 Rainfall (mm)	<b>89.0</b>	<b>51.9</b>

	Aug 2023	Aug 2022
 No. of rain days	<b>14.5</b>	<b>8.0</b>

	Aug 2023	Aug 2022
 Mean temperature (Celsius)	<b>15.3</b>	<b>16.6</b>

The figures reported are national averages for the UK. To view the figures on a regional basis: [click or tap here](#) to visit the MET Office website and view the year ordered stats by month.

# Weather by region

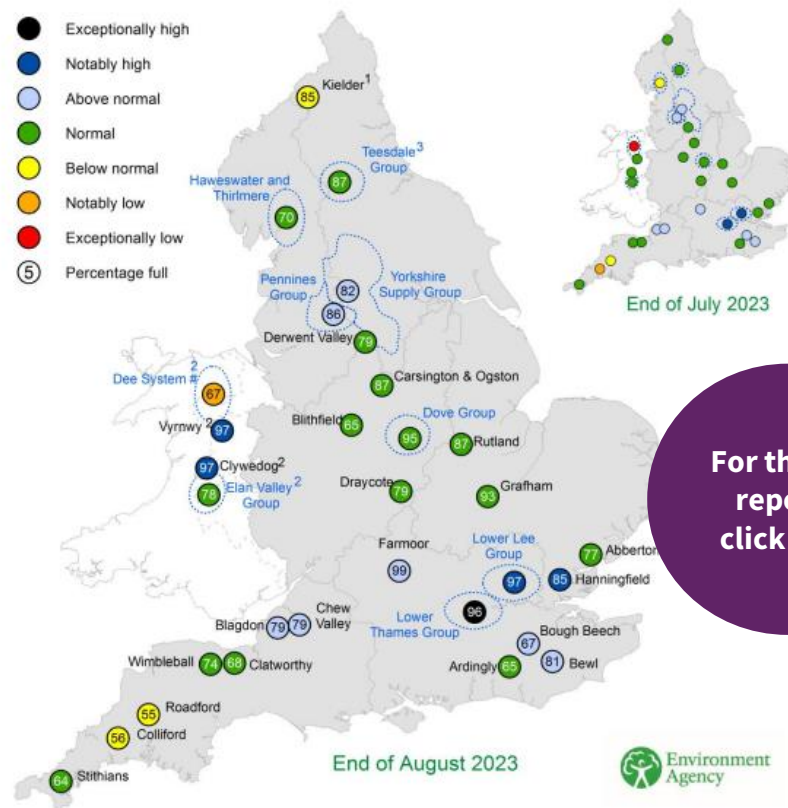


Region	Mean Temp (Degrees Celsius)	Sunshine Hours	Rainfall (mm)
Overall	15.3	148.1	89.1
South England	16.6	173.9	63.3
North England	15.5	155.0	88.2
Wales	15.2	126.0	120.0
Scotland	13.8	127.1	103.1
Northern Ireland	14.9	115.7	126.4

Once again, Northern Ireland was the wettest region with 126.4 mm rainfall in August, which was 2.9 times more than August 2022. We see the highest sunshine hours recorded in the South of England, which was 0.7 times the sunshine hours of last August.

# Current reservoir levels

Total reservoir stocks for England were at 82% capacity at the end of August, remaining the same compared to the end of July. In the east, northeast, southeast and southwest of England, total reservoir storage decreased, but increased in central and northwest England. Temporary Use Bans (TUBs) in Cornwall and North Devon will be lifted in September 25th (see page 17 for further information).



# Forecast river flows

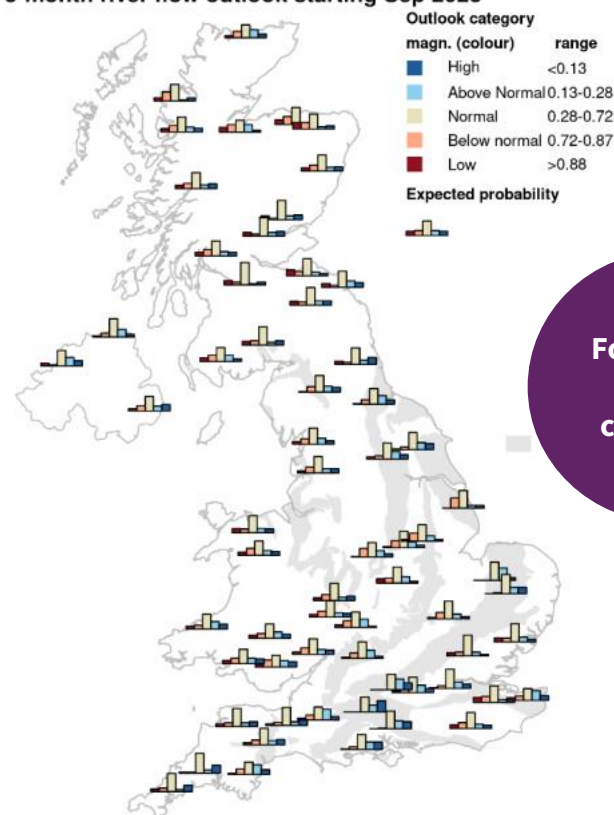
In the 3-month Outlook starting September 2023, normal to above normal flows are expected for the South of England, and normal to below normal flows in northeastern Scotland. The rest of the UK should expect a shift towards normal flows.

To interpret the infographic, the higher the bars shaded red or orange, the greater the likelihood is in that area of river flows being at low or below normal levels. The higher the yellow/fawn bar, the greater the chance of river flows in the normal range.

The UK Centre for Ecology and Hydrology have launched an online tool to view the drought in different regions in the UK-

<https://eip.ceh.ac.uk/apps/droughts/>

3-month river flow outlook starting Sep 2023

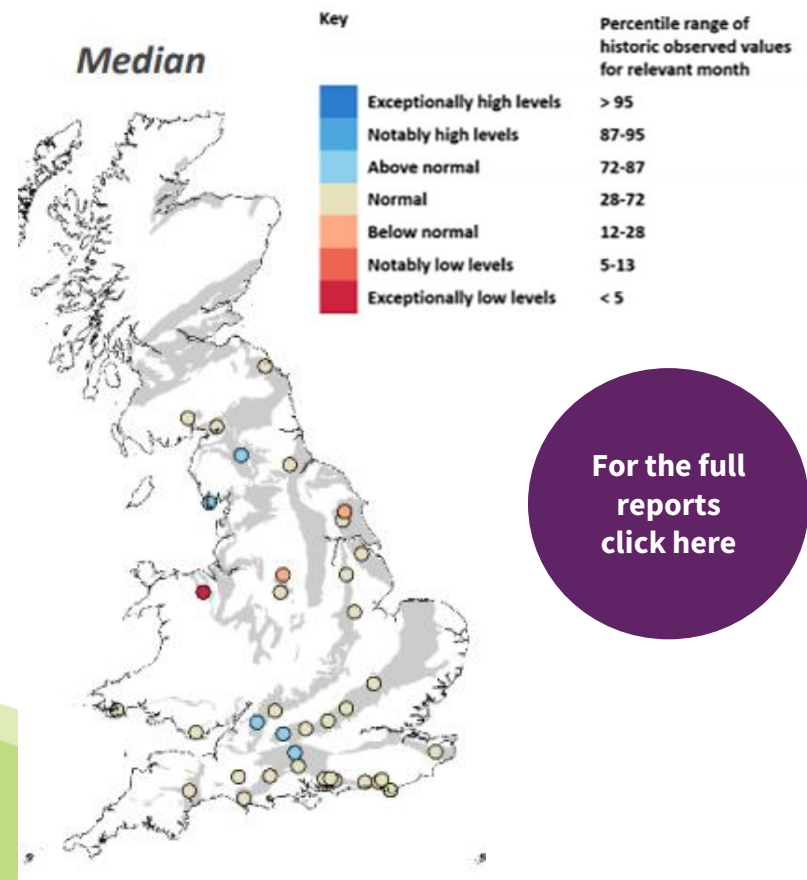


For the full reports click here

# Forecast groundwater levels

## Three-month groundwater outlook starting September 2023 (based on median rainfall forecasts)

For the September to November 2023 forecast, Groundwater levels are expected to return towards a normal level.



For the full  
reports  
[click here](#)



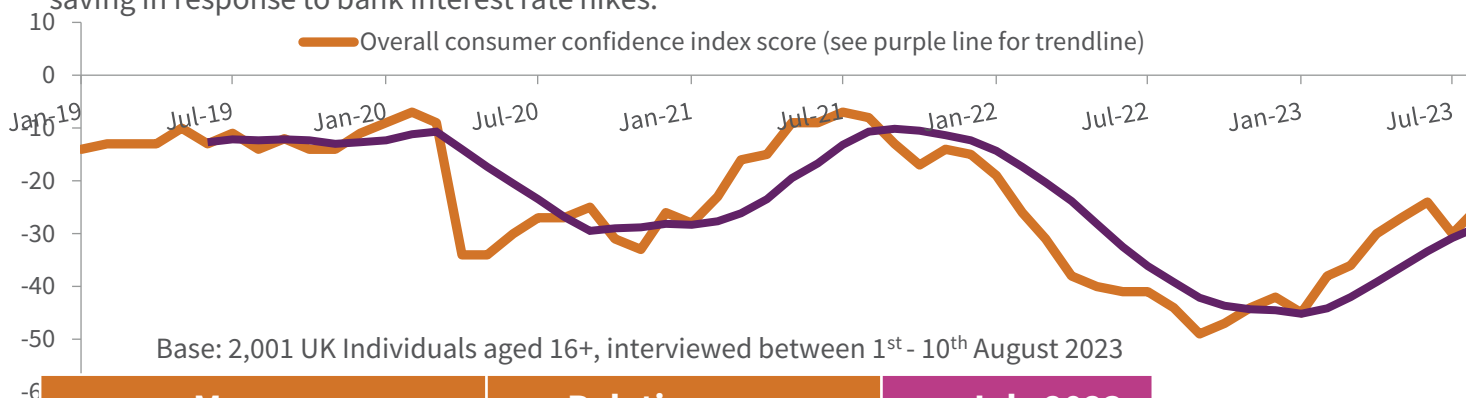
# The current water situation

- The HTA continues to represent the horticulture sector on the Environment Agency's (EA) National Drought Group which comprises government, water companies and key farming and environmental groups. Access the latest update from the Group here: <https://www.gov.uk/government/news/time-to-invest-in-our-water-security>
- With wet weather continuing through summer, water resources are generally in a good position entering the autumn. However, the recent hot weather in September has seen demand for water rise in response. Therefore, as the situation is consistently changing, the Environment Agency remains vigilant, preparing for all weather eventualities for the rest of the year and maintaining precautionary planning for severe drought.
- Following the lifting of the Temporary Use Ban (TUBs) in Sussex and Kent at the beginning of August, the TUBs in place in Cornwall and parts of North Devon will also be lifted on the 25<sup>th</sup> September, due to recent rainfall, however these two regions are still in drought status, so it is advised to remain cautious about water use.
- The Government's [Plan for Water](#) introduces investment in infrastructure and a second round of Water Management Grants to fund more reservoirs and better irrigation equipment.
- We will continue to work to ensure that any messaging relating to responsible use of water does not adversely affect participation in gardening. Businesses looking to help give ideas to gardeners of how to go about gardening in a way that makes responsible use of water can draw on content and ideas published by the RHS: <https://www.rhs.org.uk/garden-design/drought-resistant-gardening>
- HTA member businesses should prepare for all scenarios and take action to ensure continuity of supply:
  - Ensure that as much of your storage capacity is filled as is possible
  - Use water responsibly and encourage customers to do the same
  - Invest in infrastructure for water recapture where possible
  - If you have an abstraction licence, you should expect this to be questioned if water scarcity increases:
    - If you have an abstraction licence where you use less than around 60% of the annual volume you may be asked by the Environment Agency to consider reducing your licenced abstraction, the "headroom". In these circumstances you need to make a careful consideration of the reply. Having given up part of a Licence of right you may find the new licence could end up being timed unless you apply for a variation.
    - If you have an abstraction licence that has not been used for four or more years you may be asked if you require it in the future and need to justify its future use.

**Members can access the HTA's advice, resources and guidance on the ongoing situation and improving resilience here:**  
<https://hta.org.uk/news-events-current-issues/news/sustainability/water>

# Consumer confidence: financial

The GfK's Consumer Confidence climbed back up +5 points in August and was up +19 compared to August 2022. After a slight fall in confidence last month, we see the optimism return, despite still being within historically low score territory. All measures were up last month, with the Major Purchase Index showing the highest growth of +8 points. This increase may be a delayed response to the fall in core inflation reported in August, renewing hope. This would indicate that consumers were likely still spending less and saving more in response to the current economic outlook. With a high Savings Index, this has indicated that consumers were more likely saving in response to bank interest rate hikes.



Overall  
index score  
for August:  
**-25**

\*this is 5 points higher than July 2023

Measure	Relative score (August 2023)	vs. July 2023
<u>Personal financial situation:</u> during last 12 months <b>over next 12 months</b>	-15 <b>-3</b>	5 points higher <b>4 points higher</b>
<u>General economic situation:</u> during last 12 months <b>over next 12 months</b>	-52 <b>-30</b>	6 points higher <b>3 points higher</b>
Major Purchase Index	-24	8 points higher
Savings Index	27	1 point higher

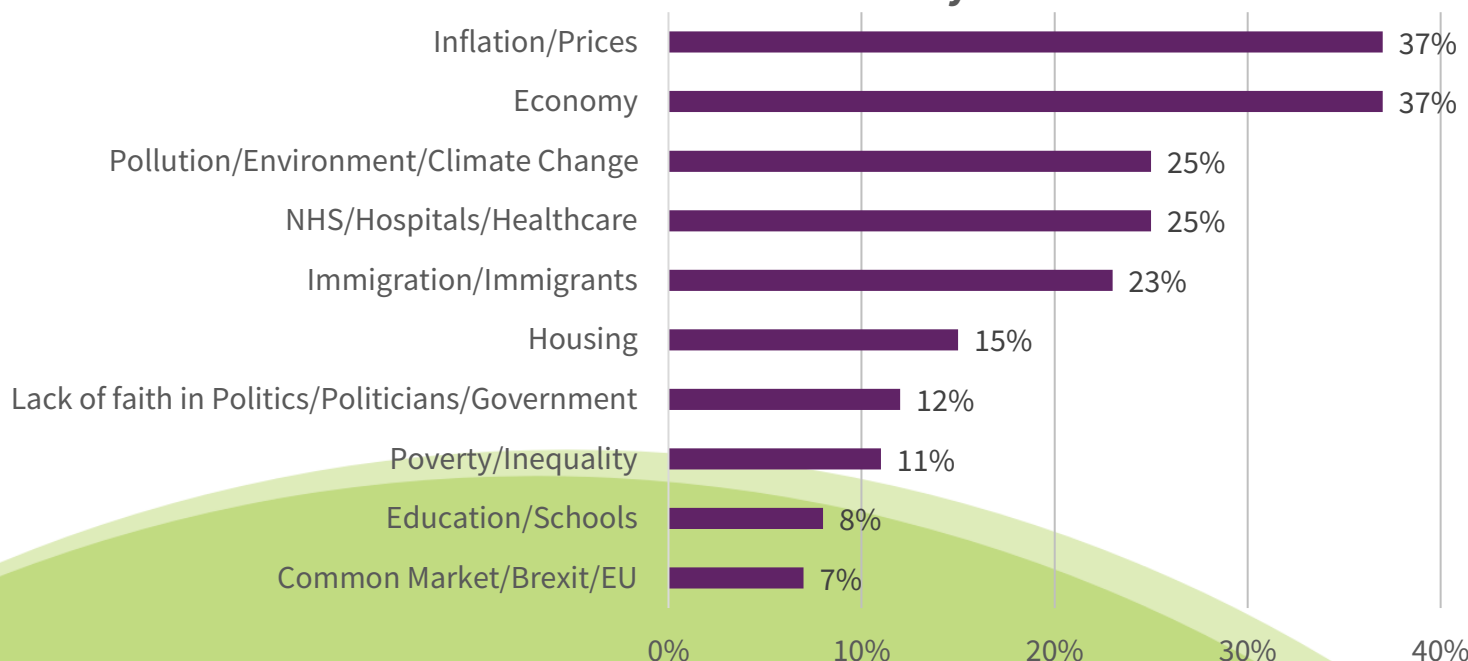
Consumers are asked how the financial position of their household has changed over the last year and is expected to change in the next year, as well as that of the general economy. They're also asked if they believe 'now' is a good time to make major purchases or to be saving money. The first three measures in the table make up the overall index score. Whilst the Savings Index indicates whether consumers are looking to save rather than spend their money. **Relative scores are given as a comparative to when records began in 1974.**

[Click to view the full summary](#)

# Consumer Issues Tracker

In August, we saw the Economy climb up two positions, sharing joint top spot with Inflation, as economic instability still weighs on the minds of consumers. Despite the fall in inflation, the UK continues to feel the effects of the cost-of-living crisis. With the news reflecting the reality of climate change, such as the widespread wildfires and heatwaves across Europe, climate change climbed up 5 points, taking 3<sup>rd</sup> position in Ipsos' Issues Index last month. There is growing evidence of the benefits of plants in the context of countering the effects of climate change. Good examples of this are carbon sequestration and urban cooling capabilities of trees, with increasing tree coverage inversely affecting average temperatures in cities.

## What do you see as the most/other important issues facing Britain today?

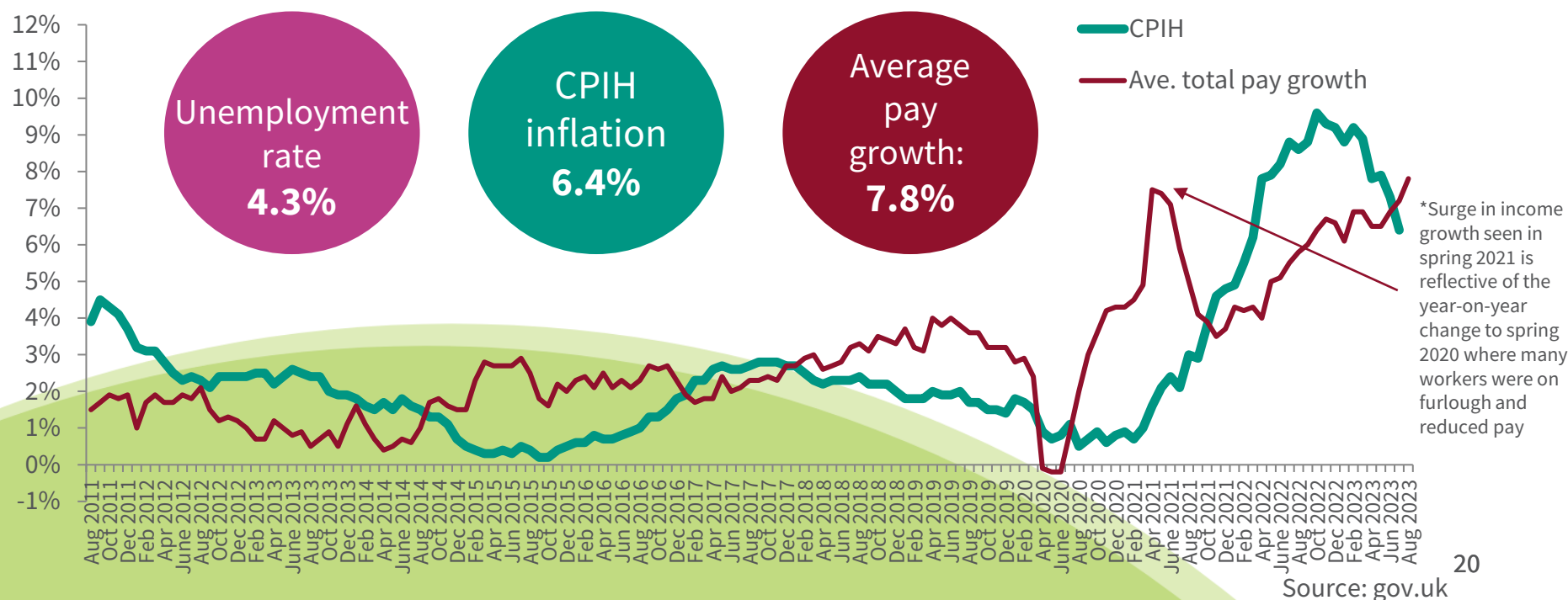


Change since July:	
%	Position
-2%	=
+7%	↑+2
+13%	↑+5
-8%	↓-1
+2%	↓-1
=	↑+1
-4%	↓-2
+2%	↑+1
-5%	↓-1
-1%	=

# The UK Economy



We explore some key indicators of the position of the UK economy to gauge the situation for consumers as well as member businesses. Both inflation and average pay growth (excl. bonuses) are measured as a percentage change over a 12-month period. As August's Consumer Prices Index including owner occupiers' housing costs (CPIH), 12-month inflation rate will be reported after release of this month's update, we continue to report last month's rate. The CPIH for July 2023 was 6.4%, the lowest rate since March 2022, yet prices are still considerably higher than this time last year. Average pay growth (excl. bonuses) for May – Jul 2023 was 7.8%, remaining the same as the previous 3-month period (Apr-June 2023), the highest rate recorded since comparable records began in 2001. With average wage growth remaining above the rate of inflation, this could have a positive effect on consumers' disposable incomes. However, this places pressure on business' overheads and makes offering a competitive wage to retain staff a challenge. The Horticultural Industry faces labour shortages, and difficulty accessing seasonal workers. Businesses are increasingly needing to look to automation and mechanisation to fill the labour gaps. The Unemployment rate went up a further 0.1% to 4.3% in August. The employment rate has lowered slightly by 0.2% to 75.5%, adjusting for the number of full-time self-employed workers.



# Retail inflation on garden products



Our August trolley  
(Aug 2023 vs Aug 2022 price inflation)



Hardy plants,  
shrubs & trees  
**+5%**



BBQs & heating  
**+7%**



Growing  
media **+7%**



Bedding  
plants **+5%**



Weedkillers  
**+8%**



Garden tools  
**+4%**



Plant Care  
Products  
**+6%**



Garden furniture  
**= (0)%**



Plastic Pots  
**+8%**



Seeds  
**+7%**

Here we look at the price of individual barcodes transacted in garden centres in August 2023 and August 2022, to calculate a median average rate of inflation within each of the categories featured. Each month we select a 'trolley' of goods that are seasonally appropriate and track the level of price inflation. In the 12 months to August 2023, within our trolley weedkillers (+8%), plastic pots (+8%) and BBQs & heating (+7%) experienced the highest levels of price inflation, likely due to rising input and ingredient costs due to demand and availability. Bedding plants and hardy plants, shrubs and trees' prices rose (+5%) buoyed by early buying of Autumnal bedding and other plants. The prices customers paid for growing media have increased by 7% due to inflationary pressures, manufacturing costs and demand for peat-free products due to the proposed 2024 retail peat ban. Garden furniture was subjected to usual end of season discounting to shift excess stock.

# Retail inflation on plants

(Aug 2023 vs Aug 2022 price inflation)



Shrubs  
**+4%**



Foliage  
houseplants  
**-1%**



Herbaceous  
**+2%**



Pack bedding **+8%**



Roses **+4%**



Vegetable and  
fruit plants  
**+8%**



Specimen  
plants  
**+14%**



Fruit trees &  
bushes  
**= (0)%**

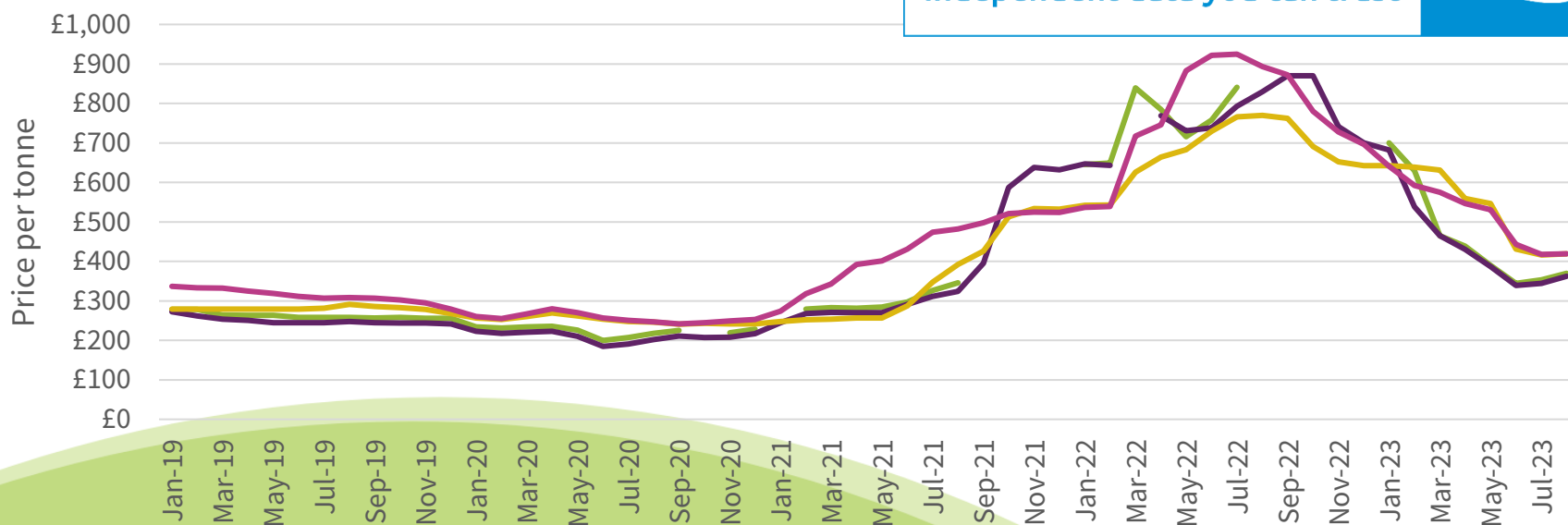
Here we look at retail price inflation across some of the plant categories specifically. Specimen plants (+14%), pack bedding (+8%) and vegetable and fruit plants (+8%) experienced the highest year-on-year price increases, followed by shrubs (+4%) and roses (+4%). Prices increased for almost all categories except foliage houseplants that registered a fall of (-1%). Increased input costs for growing and maintaining these larger plants, plus higher overhead costs for labour and transport are likely contributing factors. Rising prices along with early Autumnal buying behaviour exhibited this year by garden centre customers are likely to influence consumer decisions on the level of investment in garden plants over the next few months.

# GB Fertiliser Prices

Fertilisers are a major input cost in plant production and rising prices could squeeze businesses' profit margins. Using data supplied by the AHDB, the below graph shows how straight fertiliser prices have changed since 2019. Whilst those included are not typically used in the production of container-grown ornamental crops, nor an exhaustive list of specialist compound fertilisers used by ornamental growers, the data gives a relative indication of N, P and K fertiliser price trends. All fertiliser components have risen in August 2023, with Ammonium Nitrate UK, Ammonium Nitrate (Imported) and Granular Urea all increasing in price by +5%. However, all components are still considerably lower than the prices reported at the same time last year, such as Ammonium Nitrate down -56% compared with August 2022.

Accurate, timely and  
independent data you can trust

AHDB



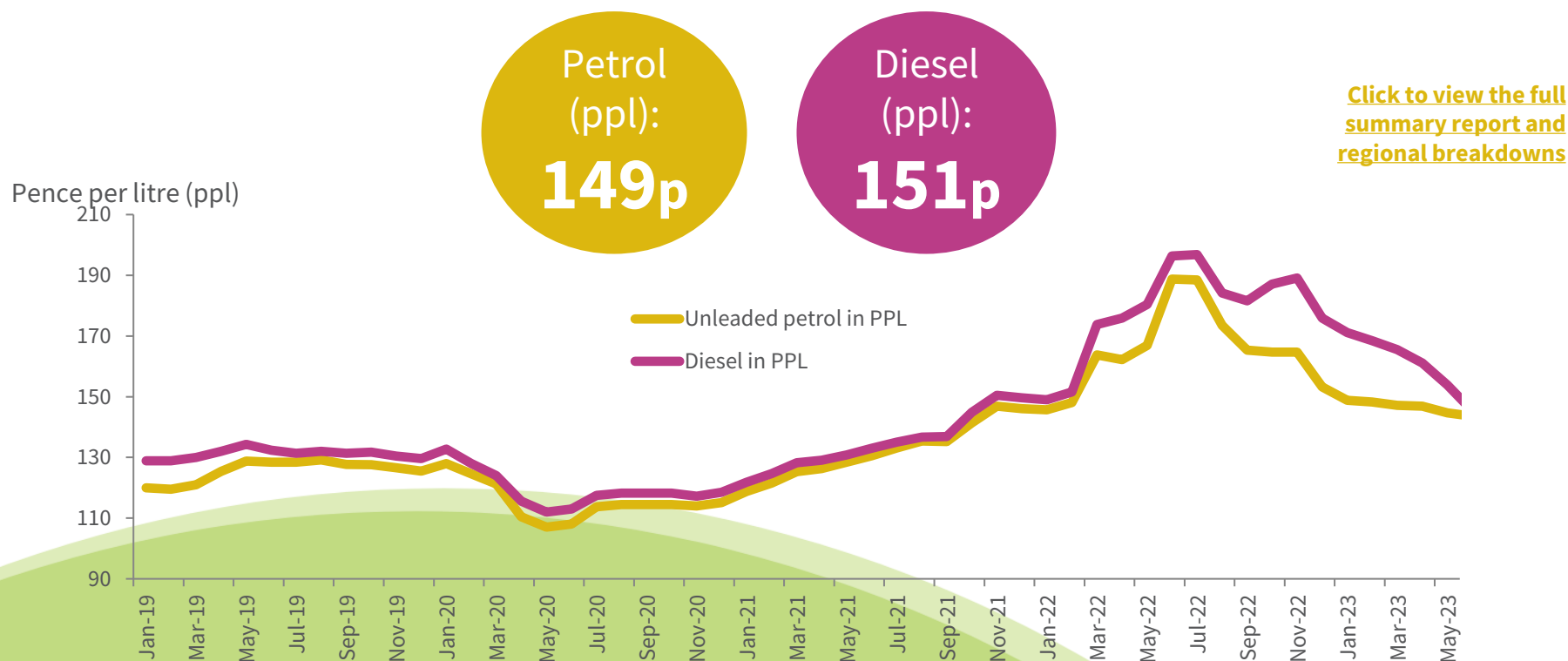
All prices are based on a price per tonne for:

- Full load
- Standard 28-day payment terms
- Bags delivered to site price
- Spot price: prices for delivery within a month (28 days)

- Ammonium Nitrate UK (34.5% N)
- Ammonium Nitrate Imported (34.5% N)
- Muriate of Potash
- Triple Super Phosphate

# Vehicle fuel prices

Vehicle fuel prices are monitored periodically to gauge the situation for consumers and businesses alike. Figures reported are national averages measured in pence per litre. For further variations by region, please click the link below to view the data. The average prices for petrol had risen to 149p/litre in August, and diesel was 151p/litre, which equalled to increases of 5.6p/litre in petrol costs and 6.6p/litre in diesel costs from July. We see this increase due to the rise in crude oil prices, which consequently affects fuel costs on consumers and businesses transporting goods.





# Closing comments

We hope you enjoyed the format and content of this Market Update.

If you have any questions or would like to see something else included, please don't hesitate to contact [marketinfo@hta.org.uk](mailto:marketinfo@hta.org.uk)

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