



# Environmental Horticulture Growth Strategy

a vision for Wales

Strategaeth Twf Garddwriaeth Amgylcheddol - gweledigaeth i Gymru





## Aims and Outcomes

-  Building healthy and resilient communities
-  Supporting local businesses
-  Protecting biosecurity
-  Improving health and wellbeing
-  Growing garden tourism
-  Increasing Welsh horticultural production
-  Securing future skills and workforce
-  Developing green economic growth

## Introduction

The HTA represents 85 member businesses across Wales<sup>1</sup> and nearly 1,400 horticulture organisations across the entire supply chain of the UK's environmental horticulture and gardening industry. This includes garden centres, tree and plant growers, landscapers, manufacturers and service providers. The HTA also manage the National Garden Gift Card programme, which is popular amongst the UK's 30 million gardeners.

In 2019, the environmental horticulture and landscaping industry in Wales supported contributions of £1.125 billion to UK GDP, £249 million in taxes to the exchequer and supported the employment of 31,168 people.<sup>2</sup>

The sector not only makes significant contributions to both the rural and urban economy, but it delivers huge social, environmental, health and wellbeing benefits to communities throughout Wales. The value of plants and green spaces is becoming increasingly recognised, yet the sector which delivers this must be equally valued and recognised.

*Green spaces such as parks, forests and gardens have been shown to have a significant positive impact on physical and mental wellbeing, promoting resilience, social connection and connection to nature. By improving access to nature-based activities, green social prescribing offers the added benefits of spending time in nature to support health and wellbeing.<sup>3</sup>*

## Why is environmental horticulture important?

### Climate resilience and the environment

Plants, trees and green spaces are critical to ensuring Welsh communities are resilient to climate change. A recent report by Cardiff University, The University of Hong Kong, and Natural Resources Wales (NRW) suggests that peak heat stress on people is expected to increase by 4.5 degrees Celsius by 2080 and that "mitigation measures are essential to reduce future heat stress in Welsh cities and towns. These include interventions such as increasing urban green spaces, ponds, lakes, trees and artificial shading."<sup>4</sup>

### Biodiversity and plant health

Research has shown that increasing the richness, cover or density of native plants in urban green spaces is linked to increases in animal biodiversity, with the biggest factor being the resources provided by the plant itself.<sup>3</sup> Biodiversity underpins the entire ecosystem of the UK and is supported by nature networks, private gardens and green spaces. Biosecurity is a priority for the plant trade and is vital for protecting native biodiversity. We continue to work with policymakers to ensure a biosecure plant supply chain that safeguards the UK's natural landscape for future generations.

### Health and wellbeing

In the Draft Mental Health and Wellbeing strategy, the Welsh Government refers to engaging with nature, parks and green spaces as 'community assets'<sup>5</sup>, garden centres also act as community hubs that facilitate social interaction and celebrate the shared love of plants and gardening. These vital pillars of communities are carefully curated, supported and delivered by the environmental horticulture sector.

### Tourism and nature

There is potential to grow the garden tourism sector in Wales, given the increased interest following the pandemic. In 2019, country parks/gardens and wildlife/nature reserves accounted for 26% of visits, rising to 45% in 2020 and 46% in 2021.<sup>6</sup> Garden retail also plays a crucial role in enabling and inspiring consumers to engage with the natural environment, with UK consumers making an estimated 200 million visits to garden centres in 2022.

## What is environmental horticulture?

This sector generally encompasses the following specific activities:



Supply of garden goods



Arboriculture



Landscape services



Garden tourism



Ornamental plant production



Wholesale of garden products and flowers



Retailing of garden products, plants and cut flowers



## An HTA Member in Wales

The Old Railway Line Garden Centre



“The Old Railway Line Garden Centre is a family-run, independent business that combines a Garden Centre, Farm Shop, and Restaurant.

We offer top-quality gardening, home, and

outdoor living products alongside delicious, fresh, locally produced food and drink. Nestled in the heart of the picturesque Wye Valley at the foot of the Black Mountains, our location boasts outstanding views of the Brecon Beacons and the Radnorshire Hills. Our dedicated team of approximately 100 employees is driven by a passion for plants, people, and the planet. We maintain a strong connection with our community, collaborating regularly with local groups and schools to promote the benefits of gardening for personal health, the environment, and biodiversity.

Sustainability is crucially important within our business development, and our enthusiastic team communicates this through in-store displays, excellent advice, and top-notch customer service, showcasing what customers can achieve at home. Plants are the heart of our business, with over 85% of our stock sourced from UK nurseries and replenished with regular weekly deliveries. Our compact site requires quick stock turnover to maintain an extensive and fresh selection.

Customer service is our hallmark, and we emphasise this through comprehensive in-house training, ensuring all new team members understand ‘The Old Railway Line Way’.

Situated in a rural area, many of our visitors travel over an hour to reach us, so we strive to provide the best experience possible, relying on repeat visits from those who make the journey.”

**Katie Eckley** | Operations Director



1. Search member businesses here: <https://hta.org.uk/hta-memberships/members-directory/?location=Wales&name=>  
 2. Growing a Green Economy, The importance of ornamental horticulture and landscaping to the UK (Ornamental Horticulture Roundtable Group, 2021)  
 3. From Nursery to Nature: The Value of Plants (HTA 2023) URL: <https://hta.org.uk/value-of-plants>  
 4. New report predicts impact of future heatwaves in Wales cities (Natural Resources Wales, 2024) URL: <https://naturalresources.wales/about-us/news-and-blogs/news/new-report-predicts-impact-of-future-heat-waves-in-wales-cities/?lang=en#:~:text=Results%20suggest%20that%20peak%20heat,10%E2%80%93370%25%20by%202080.>  
 5. Draft mental health and wellbeing strategy, Welsh Government 2024. URL: <https://www.gov.wales/draft-mental-health-and-wellbeing-strategy>  
 6. Visits to Tourist Attractions in Wales 2021 Report for Visit Wales, Welsh Government 2022. URL: <https://www.gov.wales/sites/default/files/statistics-and-research/2022-08/visits-to-tourist-attractions-in-wales-2021.pdf>  
 7. HTA independent survey with YouGov of 4,023 UK adults aged 16+ (December 2023)

## Why unlocking green growth in the environmental horticulture sector is so important for Wales<sup>7</sup>

87%

of Welsh adults say they have access to their own private garden



74%

of Welsh adults with private gardens say they tend to use them as a place to relax



62%

use their private garden space to grow plants, trees or flowers; **58%** use their garden space to feed/watch or encourage wildlife



25%

of Welsh adults say they've visited garden centres once or twice in the last twelve months; **17%** 3 to 4 times and **9%** 5 to ten times



55%

of Welsh adults have visited garden centres at least once in the last 12 months



83%

of Welsh adults agreed that gardens and public green spaces benefit their state of mind



81%

of Welsh adults agreed that gardens and public green spaces benefit their physical health



24%

of Welsh adults said they garden regularly as a hobby or in their spare time; **40%** say they garden occasionally as a hobby or in their spare time





# Welsh Environmental Horticulture

## Asks and Outcomes

### Ask

Review the existing and upcoming regulations in Wales to eliminate unnecessary red tape and ensure that Welsh businesses remain competitive

### Outcome



### Ask

Review the criteria for brown tourist sign allocation to grow garden tourism

### Outcome



### Ask

Planning authorities should incorporate at least 29.5% space for garden density in new developments and ensure the protection and maintenance of existing urban green spaces

### Outcome



### Ask

Collaborate with the UK government to ensure that the UK border processes are seamless and biosecure

### Outcome



### Ask

Recognise the value of gardens and green spaces across key policy areas by developing and implementing a holistic horticulture strategy

### Outcome



### Ask

Ensure grant support is more accessible to garden centres and growers for investments in innovation & automation technology, water capture, increased sustainability and peat-free growing

### Outcome



### Ask

Use horticulture and gardening as a policy solution to improve the recovery and mental health of patients, and for illness prevention

### Outcome



### Ask

Government should work with industry to ensure that the skills system delivers for the current and future skills requirements of the environmental horticulture sector

### Outcome



### Ask

Police response times to incidents of retail crime must be improved and assault of a retail worker must be recognised as a stand-alone offence

### Outcome



## Outcome Key



Building healthy and resilient communities



Supporting local businesses



Protecting biosecurity



Improving health and wellbeing



Growing garden tourism



Increasing Welsh horticultural production



Securing future skills and workforce



Developing green economic growth



# HTA asks of Policy Makers

**1. Recognise the value of gardens and green spaces across key policy areas by developing and implementing a holistic horticulture strategy,** which includes environmental horticulture and green spaces. This could be achieved by building on the Commercial Horticulture Plan and refreshing the 2010 Horticulture Strategic Action Plan. There is a need to coordinate cross-departmentally, and with Westminster, to maximise the value of the sector.

**2. Ensure grant support is more accessible to garden centres and growers,** who are 95% SMEs, specifically for investments in innovation & automation technology, water capture, increased sustainability and peat-free growing. This could be done through lowering the investment minimum outlined in the Nutrient Management Investment Scheme to match the UK governments Farming Equipment and Technology Fund, as the current minimum is prohibitive to smaller growers. Accessibility to support could also be improved by expanding the list of eligible items to cover items required by garden centres and tree & plant growers in the Small Grants Efficiency scheme.

**3. Government should work with the industry to ensure that the skills system delivers for the current and future skills requirements of the environmental horticulture sector.** This should be delivered through government support to facilitate stronger links with schools, horticultural colleges and employers. The inclusion of horticulture into the curriculum would help inspire the next generation of horticulturalists. This must be supported by improved careers advice regarding horticulture, landscaping and design.

**4. Grow garden tourism by leading a review of the criteria for allocating brown tourist signs in collaboration with Visit Wales.** Careful consideration should be given to the significant distances customers often travel to visit, and the modern-day facilities offered by, garden centres in Wales. The UK's garden centres receive around 200 million visits per year.

**5. Review the existing and upcoming regulations in Wales to eliminate unnecessary red tape** and ensure that Welsh SMEs remain competitive. Reduce the cost of doing business through reform of the business rates system and rates support to allow retail businesses to invest in net zero, skills and innovation. The planning system should be reformed to ensure processes do not inhibit horticultural business expansion.

**6. Take the opportunity to use horticulture and gardening as a policy solution to improve the recovery and mental health of patients, and for illness prevention.** Increase social prescribing rates for patients and ensure crucial funding in health and care settings meets the rising demand.

**7. Collaborate with the UK government to ensure that the UK border processes are seamless** for the trade of plants and uphold strict biosecurity standards in Wales.

**8. New developments or developments collectively in a planning authority should incorporate at least 29.5% space for garden density** to match the current proportion of Britain's urban residential gardens. Maintenance support and protection of existing urban green sites is also vital.

**9. Improve police response times, especially to rural locations, and make assaulting a retail worker a stand-alone offence.** Over 70% of garden centres reported crime as an issue and many retailers have invested in enhanced theft prevention measures, such as facial recognition software. These measures will help to protect local communities from increasing rates of retail crime.

*Recent modelling by the HTA found that even a modest 5% increase in the price of plants retailed (relative to the rest of the economy) would be likely to lead to a fall in the volumes of plants supplied of just over 10%<sup>3</sup>, demonstrating that passing costs onto consumers would significantly endanger the quantity of plants and trees provided, as well as their environmental and social contribution to the UK.<sup>3</sup>*