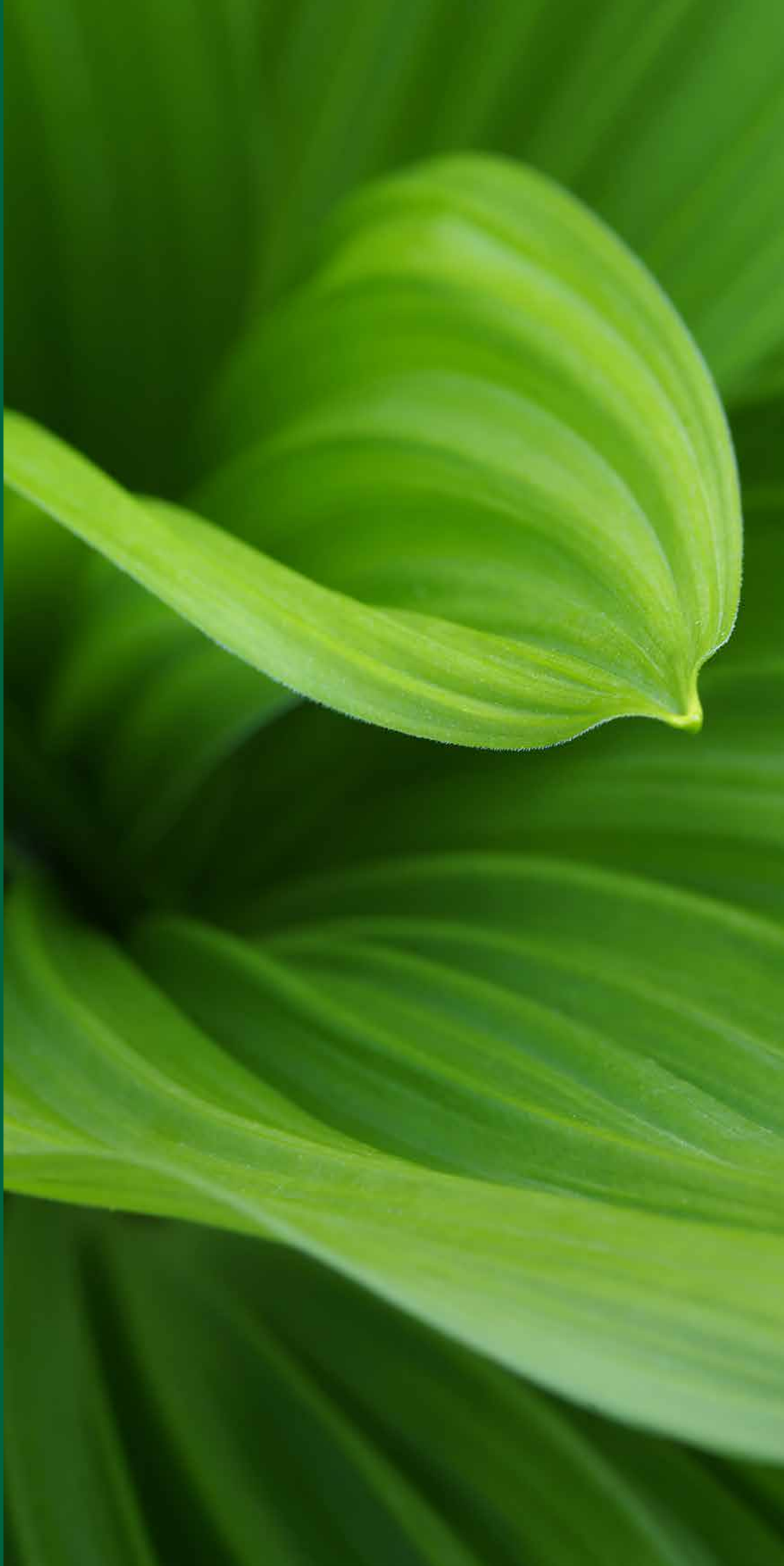


Annual Review 2024



President's Statement

Introductions from President, Chairman and CEO

As I come to the end of my two-year presidency I feel proud and honoured to have played such a vital role in what has been an exciting and transformational time for your association. I have spent a large amount of time with members (large and small) through visits, the board and council meetings and HTA events and this has allowed me to act on your behalf in an informed way and to help guide the HTA team on key issues and concerns. You will see through this report how much your association has delivered on your behalf over the last 12 months and how focussed the organisation is on creating a robust foundation to cover all of your needs in an ever-changing environment.

The milestone of celebrating 125 years is an incredible achievement for both the association and our industry. The purpose of the association is still just as relevant now as it was 125 years ago and many of the same challenges still exist. I am always astounded at how much the industry pulls together and working much more closely with HTA over the past two years has shown me just how much the association plays a key role in this through both bringing members together and providing support.

I have enjoyed spending time representing the HTA at various stakeholder meetings and events and also helping to bring my experience and connections with the media. As you will see from the activity shown in this report the HTA has significantly expanded its interactions and relationships with the wider industry and with the HTA team now in place I am excited to see this expand even further going forward.

Checking in with you each week through my presidents vlog in your member update has been a real highlight of mine over the last two years. Communication between the association and members is absolutely vital and I have seen a huge improvement in this area with a strong openness for two way conversations between the organisation and the membership, we really are stronger together.

I would like to take this opportunity to say thank you to the HTA team and our members for being so welcoming and helpful through my time as president. I have thoroughly enjoyed every moment of being your HTA President.

Finally a big thanks to my wife Felicity for supporting me and allowing us to put our retirement plans on hold!

Alan Down
HTA President



“The purpose of the association is still just as relevant now as it was 125 years ago and many of the same challenges still exist.”

Chairman's Statement



Our Annual review is currently published in September so although it has a 2024 date on it the commentary picks up a lot of what happened last year but with a roll over to how that has evolved in the current year. This year is no exception and Fran's report will cover much of this recent progress.

2023 should be remembered for two things. The instigation and publication of The House of Lords Committee on Horticulture report and the change of descriptor for our sector from Ornamental horticulture to Environmental horticulture announced at the EHG parliamentary reception in June. Both these events I hope underwrite the beginnings of a fundamental shift in the recognition of our sector within government and what its true contribution to society actually is.

These macro initiatives have been reinforced by our own internal publications "The Value of Plants" and the associated paper on how this underwrites at least half of the policy objectives in the UK's Environmental Improvement Plan.

The ability to produce this insight and data combined with our survey data and additional people resources has allowed your association to develop a far more proactive approach to policy and the legislative agenda and this has resulted in notable successes. Most notably with regard to the policy on peat where we have succeeded in getting government to take a more holistic approach to their fresh impact analysis and with regard to border controls a more pragmatic approach to inspections and an understanding of all the unintended consequences.

This has also enabled us to deliver for you a broader range of events and webinars.

"The ability to produce this insight and data combined with our survey data and additional people resources has allowed your association to develop a far more proactive approach to policy and the legislative agenda"

Financials

Our aim as a not-for-profit membership association is to maximise the benefits to all members, to match our income with our expenditure, and thus to breakeven or declare a small surplus each year at the operating profit level.

From a balance sheet perspective, the HTA Board takes a very conservative approach to matching our liabilities with our assets and to building our net assets in line with the growth of our business and to a level that gives us cover for a "rainy day". In particular, we consider the potential detriment of a market value reduction in investment values at year end.

With this in mind your association built its net assets in prior years to a high of £3.4M in 2021.

In 2023, your association's activities generated a loss before tax of (£213k). When considered within the context of a gift card breakage share impact of (£876k), the underlying result is a positive one and indeed we finished the year some way ahead of budget. As I mentioned in last year's report, gift card breakage up to June 2024 will be shared with the outgoing gift card partner according to an updated contract agreed in July 2022. This means that run-rate breakage for gift cards is temporarily suppressed.

This is the second year of three years of planned losses whilst we allow for this run off in our breakage agreement.

Net assets for 2023 have only decreased by (£84k) to £2,590k and remain ahead of original plans. With a further decrease forecast for 2024.

For 2025 onwards we should see a return to a more normal breakeven scenario.

What we have allowed ourselves is to maintain financial stability whilst at the same time to grow total expenditure on people and services from £4.9m in 2022 to £5.5m in 2023 and to £6.2m in 2024.

This I believe is what has given your association the ability to be far more helpful, professional and influential and across all nations of the UK.

Your Board

As we grow as an association so it is beholden on us to develop and evolve the capabilities of your board and we have been engaged in improving our levels of governance throughout the last 18 months.

Through natural evolution we have seen Simon Fraser retire from the Board in September last year. Our thanks to Simon for his valuable input and for his insight from a Scottish perspective.

Following this coming AGM we say goodbye to Boyd Douglas-Davies who I would like to thank wholeheartedly for his extended tenure covering three years as president through all of the pandemic and Brexit changes that so impacted our sector. We have all benefited from his industry wide knowledge and his huge energy, dedication and commitment that he has given to the role and indeed the support he has given me.

This will also be a time for a new president. Alan Down will be handing over the chain of office to Will Armitage. Alan has been a huge supporter of HTA activities across the country and has been unrivalled in visiting members throughout his two year term.

I would also like to extend a welcome on to your Board of three new directors who have and will be joining us over the course of this calendar year. Mark Pitman, Mike Burks and Holly Youde who all bring a fresh and varied skill set to the association.

As always I would like to end by thanking all our executive team for all the effort they have put in to what has been another significant year of progress for the association.

And indeed to all of our membership who have participated in our surveys or who have served on our committees. There is a significant time commitment involved in the latter and I always trust that those participating get as much out of that commitment as we obtain insight.

"Resilience has always been a hallmark in our industry and now more than ever."

Outlook

We clearly remain in uncertain times. Geopolitics has never felt so dangerous. Although the macroeconomic data maybe looking a little brighter the cost of doing business remains high not assisted by government that continues to heap regulatory cost on our industry. More so than in any other year this century.

I certainly hope that the HTA can and will remain a beacon of stability and will continue to provide information and insight to help your businesses and to keep on highlighting to government how to influence and how to manage the unintended consequences of their legislative and regulatory agenda.

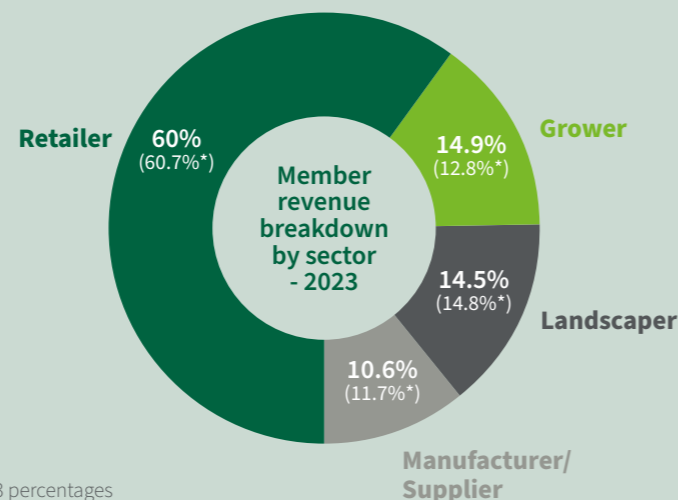
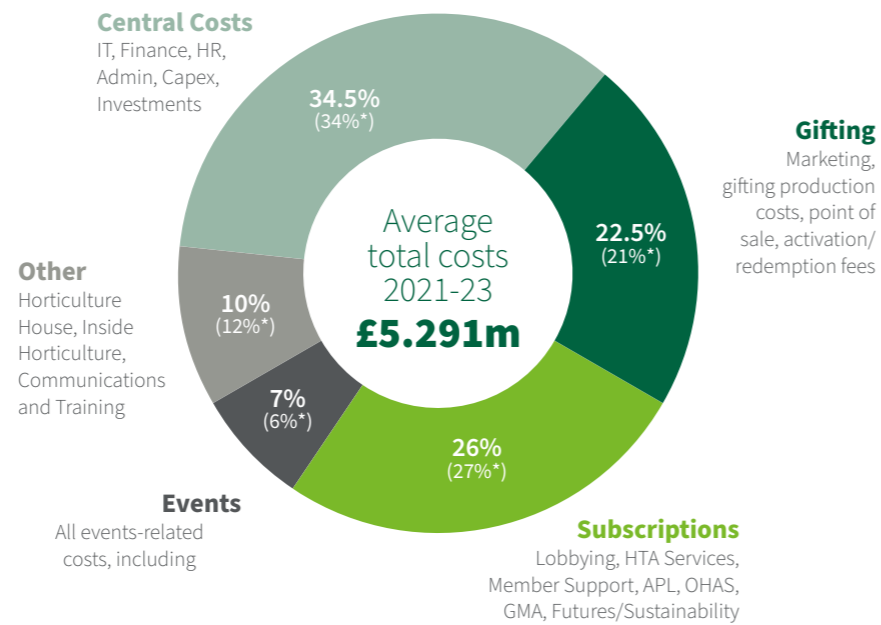
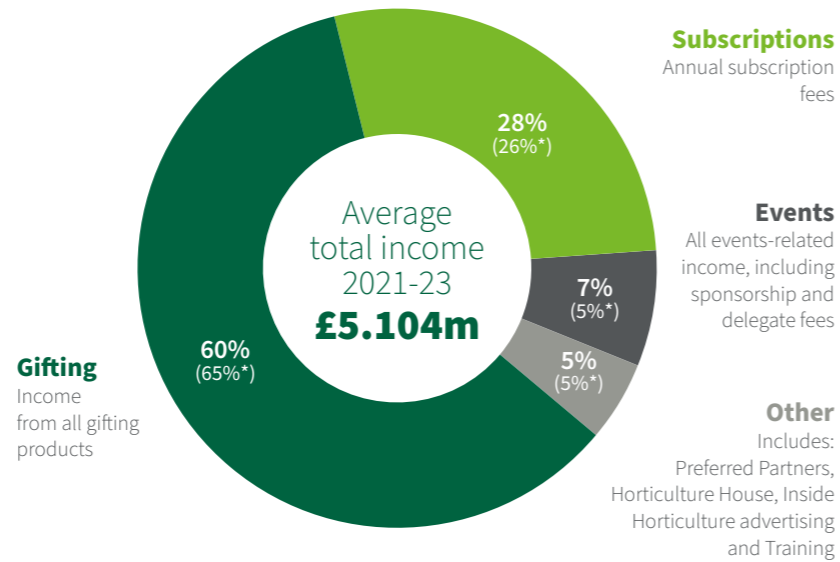
The HTA's Environmental Horticulture Manifesto published in January is timely and sets out our key asks of government whatever hue that might be and provides you with an agenda for our forthcoming initiatives.

Resilience has always been a hallmark in our industry and now more than ever. Whether that be the economic environment, the regulatory regime we now face into, or just the weather, our members both small and large have an innate capacity to handle change.

We look forward to building on our past successes and hope to share some of this with you at our AGM in September.

James Barnes
HTA Chairman

Finance



*These are 2023 percentages

CEO Statement



2024 saw the start of our three-year strategy to drive growth and increased delivery for our members. The three main pillars of 'Grow 26' focus on membership retention and recruitment, share of voice and our income. These Growth areas are supported by workstreams to invest in our people and our infrastructure.

A key part of our membership strategy is to create more opportunities for meaningful engagement, knowledge transfer, business development and networking. We have invested in our membership field team by creating an extra Member Engagement Manager role and have moved to a regional structure rather than sectoral responsibilities to enable better cross-sector engagement with, and between, our members. I am delighted to be able to report our regional engagement plans are underway which have had high attendance. We are investing further in our Business Improvement schemes for retail members and reinvigorating our Nursery Improvement scheme for growers.

Over the last year we have strengthened our member representation with the introduction of a Retailer Committee and an increased focus on Plant Cultivation Products (with a working group of manufacturers and associated organisations) where we know there are current and future regulatory challenges. Alongside that our virtual Town Halls and Policy Workshops have been extremely well attended by members and we are increasing the number of in-person knowledge transfer events. This year we held a biosecurity event at FERA in York attended by our grower members and in October this we will hold an inaugural event at Stoneleigh in Warwickshire 'FutureGrow Expo' to showcase and demonstrate the latest technology and automation available in our sector.

Your association has worked to deliver an increased political and media presence for environmental horticulture and our growers, manufacturers, retailers and those who deliver the country's cultivated green spaces. This 'share of voice' is a key area for us and the associated KPIs enable us to measure our presence and our impact in influencing policy and regulation whilst creating public support. Critical to this is the increased recognition of environmental horticulture as a solution to many of the pressing problems current and future governments will need to tackle – climate change, the journey to net zero, health and wellbeing improvements, economic delivery and biodiversity gain. The HTA has featured in Radio 4 several times this year on issues which are pressing to our sector, particularly the changes to border controls which landed on the industry this year. We have championed your interests at the heart of government and you will no doubt have seen our growing presence in Westminster as well as the corridors of power and influence in Scotland, Wales and Northern Ireland.

Our preparations for the General Election began at the start of the year with the production of a Manifesto for Environmental Horticulture in Spring, which put us on a strong footing ahead of the announcement of a snap General Election. With a landslide majority

for a new government there has never been a more important time for the HTA to have an informed, robust voice and trusted voice to represent your interests with credibility and expert knowledge. Our members have been active in their support and have worked with the HTA's professional staff to deliver MP lobbying in their businesses with real impact. In addition to writing to the Prime Minister, Chancellor and two secretaries of state, a letter, sent to every MP encouraging visits to our members, has received a high response and is creating opportunities for further engagement and influence. The HTA is the leading association representing Environmental Horticulture and we will grow this area with tangible outcomes at this critical time.

This work is only possible with a resilient and growing income stream. Our income is generated from two main sources – membership subscriptions and income derived from the National Garden Gift Card Scheme. National Garden Gift Cards are an important way of 'locking in' consumer spend into horticulture when there are so many other gift cards available. Our scheme delivers to the bottom line of our members businesses both in sales but also, critically, redemptions. The HTA is focusing on numerous exciting initiatives to ensure the scheme meets the expectations of both members and consumers, maintaining its competitiveness with other leading gift card schemes in the UK.

An organisation is nothing without its people – both members and staff. We have invested significantly in our member engagement and we are currently reviewing our people development strategy to ensure the HTA remains in a strong position to attract and retain the best people to help us deliver ever more for our members.

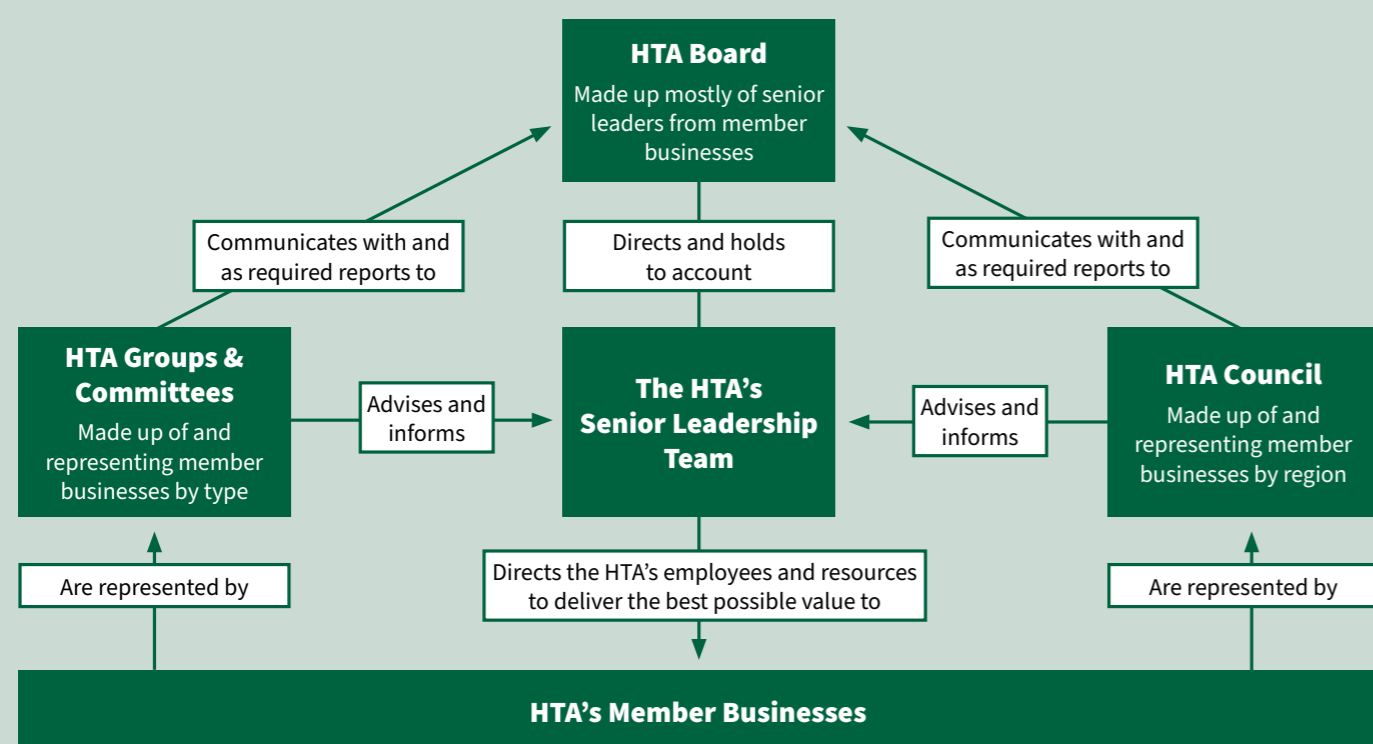
I would like to thank our staff team for their resourcefulness, expertise and passion to represent and champion this sector. But critically also every member who supports our organisation to be the strong voice and support it is.

I hope we see even stronger engagement and growth over the coming year building on the successes so far. Environmental horticulture is in a prime place to be a solution to many of the financial, environmental and well-being challenges the country faces. I am proud to be the Chief Executive of an organisation which helps to create a flourishing future for this sector and to champion and promote the importance of environmental horticulture to the British people and government.

Fran Barnes
HTA CEO

Governance

As an association, we support and nurture our industry to ensure a robust and sustainable future. For 125 years we have represented and supported our members on issues impacting the sector. We give our members a platform to promote their business and develop relationships with suppliers and customers. This is embedded in the association's governance and leadership, which is summarised below.



The HTA Board

The HTA Board is made up of HTA members, it directs our affairs and acts as the guardian of our members' interests. The Board holds the executive senior leadership team to account for delivering on the vision and mission of the HTA whilst providing strategic oversight to ensure the sound use of the association's financial resources. The board comprises the President, Immediate Past President, the Vice President, and other non-executive directors from member horticultural businesses. The CEO, Finance Director and Chairman from the HTA's executive team sit on the board and are statutory directors of the HTA.

Our Non-Executive directors are passionate about seeing the industry succeed. They have the same general legal responsibilities as any other director of a company but work in a voluntary capacity. Appointments are made by the board following a review by the nominations committee. Appointments will be senior industry figures, usually working in businesses within the HTA membership. Our board includes directors from different sectors of membership, and has a good balance of skills, knowledge and experience from across the horticulture industry. Appointments are ratified at the HTA's AGM. The HTA is fully committed to the elimination of unlawful and unfair discrimination and promotes this through its Equal Opportunities policy.

The HTA Board Members:

HTA President Alan Down - Down to Earth
Immediate Past President Boyd Douglas-Davies - The Boyd Partnership Ltd
HTA Chairman James Barnes
HTA Chief Executive Officer Fran Barnes
HTA Finance Director Alex Vick
Adam Taylor - Taylors Bulbs
Brian Fraser - Oakover Nurseries
Jane Lawler - Lawler Associates
Matthew Bent - Bents Garden and Home
Vicky Nuttall - The Garden Industry Manufacturer's Association (GIMA)
Geoff Caesar - Allensmore Nurseries
Neil Grant - Ferndale Garden Centre
Will Armitage - Business & Retail Consultant

HTA Council

The HTA Council is a body of 14 regional representatives who voice the views of all sectors of our membership to the HTA Board. They provide guidance, advice, and constructive feedback to the executive teams at HTA and serve as a conduit for feedback from members to the HTA Board.

Representatives are elected and work in a voluntary capacity, meeting three times a year. They are an enthusiastic group of industry experts who regularly and honestly share their opinions, along with those of their regions, with the executive team. Without them, the quality of information flowing into the organisation would be reduced.

HTA Council Members:

Chair: (HTA President) Alan Down - Down to Earth
Devon & Cornwall Sarah Daniel - Pengelly Plant Centre
Essex Tristan Bourne - Perrywood Ltd
East Anglia Chris Green - Chapel Cottage plants Ltd
Scotland Helen McDonald - Merryhatton Garden Centre Ltd
South East Mark Gilbert - Tates of Sussex Garden Centres
Thames Valley Merlin Brooke-Little - Nicholsons Nurseries Ltd
North West Adrian Cornelissen - Burleydam Garden Centre
North Home Counties and North London Rebecca Grant - Joseph Rochford Gardens Ltd
Northern Ireland John Shannon - Inver Garden Centre
Yorkshire and the North East Amy Stubbs - Woodthorpe Garden Centres Ltd
West Midlands Mollie Higginson - New Leaf Plants Ltd
West of England Andy Campbell - Andy Campbell Consulting

Groups & Committees

There are a variety of committees in the association which ensure that the wants and needs of different types of member business are met; they act as a critical friends to the HTA team in planning and carrying out the HTA's activities for members.

Ornamentals Management Committee (OMC)

Chair: Jonathan Whittemore, Johnsons Nurseries Ltd

The OMC represents ornamental growers supplying both retail and amenity markets, convening three times a year to address critical sector issues and contribute to HTA policy initiatives.

Key priorities have included assessing the impact of peat reduction on the sector, proposed changes to plant import regulations, plant health concerns, and future R&D requirements within the ornamentals sector. Additionally, securing a reliable supply of quality seasonal labour has emerged as a potential constraint on the growth opportunities identified for UK ornamentals production.

Ornamentals Technical Committee

Chair: Ed Holmes, J&A Growers

The Ornamentals Technical Committee, composed of growers and plant producers, plays a crucial role in advising the HTA on technical horticulture matters, which are then shared with members through workshops and the website. The committee is structured into four specialised sub-groups: Automation, Irrigation, Growing Media, and Crop Protection. These sub-groups focus on addressing current challenges within ornamentals nurseries and facilitating knowledge exchange between research and development providers and industry stakeholders. Their primary objective is to assist ornamentals nurseries by exploring innovative solutions and enhancing technical expertise in the sector.

The HTA sees that influencing and sharing the findings from scientific R&D will be key to ensuring improved productivity and sustainability among members in the future, and the committee plays a key role in this ambition.

HTA Tree and Hedging Group

Chair: Ed Holmes, J&A Growers

The Tree and Hedging Group within the HTA comprises representatives from over 30 businesses spanning from the North of Scotland to the South of England. These businesses specialise in supplying field and container grown tree and hedging plants. The group is led by eight steering group members who actively promote and advance all aspects of production. Their collective efforts aim to benefit both members of the group and the broader horticultural sector by advocating for best practices, fostering innovation, and addressing industry challenges.

Association of Professional Landscapers (APL)

Chair: Holly Youde, Urban Landscape Design

The APL plays a crucial role in establishing professional standards required for APL membership and provides guidance to the HTA on effectively supporting landscapers within the association.

Holly Youde is the first UK female Chair of a landscape association, and throughout her tenure, she has made significant strides in improving diversity within the industry and encouraging more females to enter the sector.



Jonathon Whittemore

Holly Youde

Ed Holmes

Member satisfaction

Voice of the member - you said, we did

We regularly consult our membership to maintain a view on how members are feeling, what's important for us to focus on, and to ensure we can effectively represent the sector by evidencing key issues or opportunities in our policy and media work with real data and case studies.

We continue to conduct a weekly member satisfaction survey, sent to a sample of one-tenth of member contacts, offering them the opportunity to raise specific issues and provide feedback on our performance. Members rate us on a scale of one to ten and provide comments to elaborate on their rating. These results are shared with staff weekly, ensuring that the voice of our members is always at the heart of what we do. Quarterly, our management team reviews key patterns and themes identified from these surveys. Additionally, three times a year, the HTA Council, with input from regional representatives acting on behalf of members, reviews these insights. This structured approach ensures that we continuously improve our services and advocacy efforts based on direct member input and feedback.

In early 2024, we conducted a member consultation survey to establish a baseline for our three-year strategy. This survey enabled us to identify the most important aspects of HTA membership for each type of business within our membership. It also allowed us to assess our performance in meeting these expectations. This initiative expanded upon our earlier member focus groups and segmentation exercises conducted in 2022.

Based on these insights, we developed a new navigation menu for the HTA website, designed to enhance user experience with a personalised approach tailored to different business types. This improvement aims to deliver greater value to our members by ensuring that they can easily access relevant information and resources aligned with their specific needs and interests.

To everyone who's taken the time to give feedback or input on a specific issue or research study, thank you – it really does make a difference to improving and shaping what we can deliver for your benefit.

Over the past year, our focused and comprehensive surveys have enabled us to:

- Tailor our technical support and lobbying efforts based on current peat usage and identify challenges that remain in the movement to peat-free.
- Collect information in collaboration with the Environmental Horticulture Group and Oxford Economics to quantify the industry's environmental footprint for the very first time.
- Gather data on the impacts of cross-border trading for our members post-BCP launch, which has been instrumental in our advocacy efforts with ministers and policymakers.

This wouldn't be possible without the businesses who take part, and so the time and effort spent completing these surveys is fully appreciated. We never conduct a survey unless it's valuable in helping us to represent the interests of our members.



Giftng

Giftng Performance

National Garden Gift Voucher sales in 2023 exceeded the prior year's record high by almost £1.15 million or 4%, marking another solid performance. All sales channels—member retailers, business-to-business, and online—performed above the prior year. Gift card sales increased to 88% of total sales, compared to 78% in 2022.

The migration away from paper vouchers continued, with sales falling by £3.2 million, while gift cards increased by £3.4 million and digital e-gift cards by £943,000. This strong performance is noteworthy, especially considering that the HTA's key member retail channel, like other UK retail sectors, faced significant macroeconomic pressures. These pressures included rising inflation, increased costs, and declining consumer confidence.

The first half 2023 experienced significant year-on-year growth, providing a solid foundation for a slightly more challenging second half. Despite this, the full-year results were strong, ultimately securing almost £40 million of consumer spend for future visits to HTA member garden centres.



Strategy and Outlook

2024 has started well for the programme, with year-to-date performance tracking ahead of last year. This is particularly impressive given the persistent wet weather conditions we've had in the first half of 2024, which negatively impacted on garden centre footfall and sales. The main aim of the scheme is still to attract consumers to the horticulture sector, locking in over £40 million of funds and growing the more than 2 million consumer transactions in garden centres each year.

We continue to focus on exciting initiatives to ensure our scheme aligns with member and consumer expectations and remains competitive with other gift card schemes in the UK.

Over the past two years, the gifting scheme has been functionally transformed, migrating from 45% paper vouchers in 2022 to 15% in 2023 and 0% in 2024. The scheme is now 100% electronic, with 85% issued via physical gift cards and 15% as digital e-gift cards in 2024. The growth in digital e-gift cards has been driven by organic consumer demand rather than marketing campaigns. While we believe their popularity will continue to grow, we do not expect them to exceed 20% of the total scheme.

It should be noted that 100% of the scheme redemptions occur in-store by our retail members. Currently, we have enabled one member retailer to redeem gift cards online via their webstore. We plan to extend this provision to other interested members, though we expect over 95% of the scheme redemptions to remain 'bricks-and-mortar' based.

Current 2024 functional workstreams include launching the storage of cards in mobile phone wallets in July and the photo-personalisation of e-gift cards in August. From a marketing perspective, we will implement scheme brand development during the summer, transitioning from a 'voucher' to a 'card' position to reflect the current proposition.

We are committed to every aspect of the National Garden Gift Voucher programme, ensuring it remains future proof amidst evolving customer trends and technological advancements. Our primary focus is on ensuring our members derive a positive return from their participation.



National Garden Gift Voucher sales in 2023 exceeded the prior year's record high by almost **£1.15m**

The Gifting scheme is now 100% electronic, with **85%** issued via physical gift cards and **15%** as digital e-gift cards in 2024

100% of the scheme redemptions occur in-store by our retail members

Member Value

Research and Insights

Over the last year, we have continued to invest in our business benchmarking offer for members. We've been developing a new platform to house all of our studies from sales to wages and financial benchmarking within the existing HTA website login infrastructure, improving the experience for members. The new platform will allow us to extend our sales benchmarking to growers and to develop grower inputs benchmarking to help businesses measure usage of inputs like energy, water and fertilisers, and progress with sustainability.

We continued to expand the EPOS-based Garden Retail Monitor (GRM) system sample and the data we extract from it. This includes the addition of transaction numbers analysis to our monthly Market Update reports, providing an indication of how garden centre footfall is faring alongside sales. The Market Update continued to be a popular output, downloaded by over 600 member businesses in 2023.

We produced and released a report into the opportunity for mechanisation in ornamental horticulture, highlighting to technology providers and policy makers that there is a need and demand for labour-saving and efficiency-driving automation within our industry with the right support. We also expanded our own use of technology within the team, for the first time using artificial intelligence (AI) to facilitate online consumer focus groups to test the evolution of the National Garden Gift Voucher brand and design work.

As part of the Environmental Horticulture Group (EHG), we worked with Oxford Economics to update publicly available figures on the industry's contribution to UK GDP, tax revenues and employment. To allow members to speak to their customers with authority about the environmental benefits of plants, we produced a Merchandising Guide on Evidencing Environmental Claims, collating sourced evidence to use in promotional messaging. This guide accompanied a Plant Merchandising Guide describing which plant features appeal to which types of garden centre customer, in follow up from the Value of Plants research conducted in 2023.

Learning and Development

At the start of 2024 we re-launched the HTA Hub with an annual subscription model, replacing individual course purchases with a cost-effective site licence tailored to each company's user base. This provides comprehensive access to eLearning modules, training materials, development insights, and downloadable assets, which cater to both seasoned professionals and beginners.

The Hub supports flexible learning via smart devices or desktops, with courses broken down into manageable chunks for effective learning. As our members' needs evolve, so does the Hub, ensuring a dynamic platform that continually grows, offering exciting training opportunities to elevate member businesses. It offers affordability without compromising quality, and features webinars, targeted workshops, reports, and events. Content is accessible globally through Google Translate for multilingual support with audio. This year also saw the relaunch of our Nursery Business Improvement Scheme (NBIS) under new consultant Will Armitage and the introduction of the BIS South Central Group with consultant Alyson Haywood.

David Garnett of Garnetts Gardens, a BIS member for approximately 20 years, has highlighted the unique group dynamic and the benefits of membership, including positive member input, idea sharing, problem-solving, and camaraderie. He strongly recommends attending at least one meeting to experience the possibilities BIS could bring to your business.

Additionally, our collaboration with Defra on eLearning courses, such as 'NIPHL- Plants and Seeds for Planting,' supports traders navigating legislative changes under the Northern Ireland plant health label (NIPHL) scheme, ensuring compliance and business continuity.

“BIS is a fantastic scheme that has brought so much to its members. We are pleased to expand these schemes, offering more support and fostering greater connections between members.”

Alex Jenkins, HTA Learning and Development Manager



Grower Technical Workshops

Building on the first two years of Grower Technical Workshops, the third year has seen the introduction of masterclasses which complement the workshops. As part of the masterclass format, attendance is limited to ten, allowing delegates the opportunity to optimise their own nursery activities and to join in group discussions to share best practice and practical solutions.

Topics this year have ranged from establishing plants in peat-free growing media, vine weevil control in container-grown crops, adjuvant selection, herbicide programme design, irrigation water treatment options and root disease management. We've created a series of in-depth webpages to support growers in their transition to peat-free growing media, covering important topics such as irrigation and nutrient optimisation, crop monitoring, and the impacts on nursery procedures and machinery.

Preferred Partners

It's been another successful year for the Preferred Partnership Scheme, which continues to help members reduce their business operating costs during these challenging times. The scheme offers benefits in various areas, including packaging, security equipment, health, safety, HR and employment law, health and wellbeing, insurance, card processing, and telecommunications.

We continue to review current partners and check their offers against the market to ensure members can access the best deals. For 2024, we have consolidated the scheme to focus on the partnerships that make the biggest difference to our members.

Preferred partners have been supporting a range of HTA events throughout 2023/2024, providing members the opportunity to discuss the benefits on offer in person. Look out for our preferred partners who will be attending some of the HTA regional events planned for autumn 2024. The HTA will receive a commission fee based on a successful referral. The amount of the commission will depend on the type of order placed. Full details will be provided by the Preferred Partner before entering into the transaction.

Example member savings with Lloyds Cardnet:

Average Savings per member: £2,500

A member recently saved £36,000 by switching to Lloyd's card processing

The HTA will receive a commission fee based on a successful referral. The amount of the commission will depend on the type of order placed. Full details will be provided by the Preferred Partner before entering into the transaction.

Leadership & Influence



Lobbying

We have actively been engaging with UK parliaments, collaborating with politicians from all parties, Members of the House of Lords, civil servants, officials, and international representatives. Utilising our Manifesto, which outlines ten key asks for the next government (hta.org.uk/manifesto), we've engaged Defra Ministers and their Shadows, hosted events in Parliament and Holyrood, organized visits to HTA members, and participated in roundtables and presentations. We've also written to MPs, featured in the Parliamentary Magazine and Politics Home, invited Ministers to speak at the HTA Conference, and surveyed MPs.



Our recognition and standing in Westminster and Holyrood has never been stronger, which is crucial given the sector's challenges, including border trade, peat, business costs, and retail crime. The HTA is a leading member of the Environmental Horticulture Group, collaborating with organisations like the NFU and Bali, and regularly meeting with Defra Ministers and officials.

We've developed a strategy for Wales with a new policy document launched in the Senedd, drawing from our success in Scotland. Additionally, we are extending our outreach to Assembly Members in Northern Ireland and continue supporting members in navigating the Windsor Framework.



Peat

In England and Wales, the Department for Environment, Food and Rural Affairs (Defra) has proposed a ban on the sale of peat in horticulture, to be implemented by the end of 2024 for retail bagged growing media and by the end of 2026 for growers. However, despite the initial announcement in March 2023, the government has not yet introduced a bill in parliament to enforce this ban.

In Scotland, the Scottish government plans to bring a bill to parliament to ban peat in horticulture at some stage in 2024, focusing on the amateur market.

We are firmly committed to guiding and supporting our members in preparing for a peat-free future. While the HTA may not agree with the necessity of a ban and has severe reservations about a rushed timeframe, we recognise the importance of transitioning to a sustainable peat-free industry. We are actively lobbying the UK government to secure comprehensive support for the industry. This includes advocating for grants for technical equipment to facilitate peat-free growing, financial assistance for businesses transitioning to peat-free alternatives, and support for research and development of sustainable growing media.



Scottish Parliament Cross Party Group visit to see how horticulture can benefit social health and how charities are using plants and trees to support vulnerable people.

In 2023...

93
Parliamentary mentions

224
Political engagements of which there were **51 Ministers**

422
Officials/Civil Servant meetings

10
Policy Wins

39
Policy Publications



Borders and Trade

Throughout the past year, the HTA has played a pivotal role in shaping border controls and addressing sectoral challenges. We actively engaged with Ministers responsible for border policies through written communications and face-to-face meetings. We contributed significantly to inquiries by the National Audit Office and the Public Accounts Committee on border and trade issues, ensuring our industry's voice was heard at the highest levels. Participation in key forums, such as Roundtables with the Cabinet Office Borders Group and Defra on Border Control Posts, provided essential platforms to advocate for industry priorities and influence policy development.

The HTA leads industry initiatives by co-chairing the e-Plant Passport task and finish group and forming the Cabinet Office's NI Horticulture Working Group. We continue to strengthen our cross-industry collaborations. Our ongoing efforts with APHA, Defra, ports, and hauliers have been instrumental in addressing border control challenges and facilitating operational transitions. To ensure continued progress, we have helped develop and pilot the AOS (Authorised Operator Scheme) model alongside Defra.

The HTA's influence extends internationally, with regular engagement and strong relationships with EU counterparts and key embassies such as the Netherlands, France, and Ireland. Member support remained a cornerstone of our activities, featuring regular briefings, well-attended webinars on Borders, Trade, and CITES, and operational meetings with Defra.



Labour and Skills

Over the last year, we have focused on both seasonal and permanent skilled labour, recognising their critical role in fostering green growth. We have been at the forefront of advocating for the recognition of horticultural careers as vital to our environmental and economic future.

A significant achievement was the government's commitment to a five-year seasonal worker scheme, a longstanding HTA request. While this is a positive step, we now urge the government to provide detailed information on visa numbers to enable businesses to effectively plan. Along with our members we have actively participated in the Migration Advisory Committee's (MAC) review of the Seasonal Worker Scheme (SWS), to ensure the sector's needs are well represented.

Additionally, we have submitted comprehensive evidence to several key inquiries, including the Low Pay Commission's inquiry into the 2025 National Living Wage rates, the Shortage Occupation List, and multiple Westminster Committee inquiries on skills and labour. Furthermore, we collaborate with the Education and Employment group of the Environmental Horticulture Group (EHG). These efforts reflect our ongoing commitment to influence policy decisions that directly impact our members and the broader environmental horticulture sector.

Wales

We are dedicated to advancing horticulture in Wales through strategic initiatives and active stakeholder engagement. A key milestone is the publication of the Welsh Environmental Horticulture Growth Strategy, which outlines a vision for green growth in Wales and identifies the necessary policy levers to achieve this. We discussed this with stakeholders at its launch at the Royal Welsh Show 2024.

We have increased our conversations with Senedd members, with Samuel Kurtz MS visiting Tavernspite Garden Centre in March, James Evans MS visiting Old Railway Line Garden Centre in July and additional visits are planned to continue the dialogue and support.



Our efforts are reinforced by ongoing collaboration with Welsh stakeholders via the Welsh Horticulture Alliance Groups. This continued engagement ensures that the interests and needs of the horticulture sector are effectively represented and addressed, fostering a robust and sustainable horticultural industry in Wales.



Media Engagement

Last year, we reported on resetting our media function to elevate the sector's profile and highlight the critical issues faced by our industry. This year, we can proudly share some of the achievements we have already made in this area.

We set out our objective to inform the public and policymakers, ultimately driving positive change in engagement and support for the sector. This has been particularly successful in addressing Borders and Trade issues. By working closely with the Policy and Public Affairs team, we have leveraged data, collaborated with our members to share their stories with the media, outlined clear policy asks, and identified relevant hooks to align our stories with current events. Additionally, we fostered strong working relationships with national newspapers. This campaign alone has generated 581 media mentions and various headline stories, and the story continues as the challenges persist.

Our innovative approach to the National Garden Gift Card scheme has been a collective success. Through our collaboration with The Sun newspaper for a competition in the week of RHS Chelsea, we received an impressive 3,473 entries. Our stand presence at the event also fostered engagement with a celebrity audience, further boosting our reach to new audiences.

Our media engagement efforts are not just about amplifying our voices and raising awareness. They are a testament to our unwavering commitment to advocating for our industry's interests and driving positive change. We are dedicated to maintaining this momentum and further strengthening our media relationships as a trusted source of content, ensuring that our industry's voice is heard and respected.



At the last general election, there were around 32 million voters. That's 32 million people who were being wooed by political parties of all colours for their vote. But consider this: every year, there are around the same number of gardeners in the UK - 30 million people, to be accurate - with many more who benefit from the UK's cultivated green spaces.



Flower growers have warned of a shortage of bouquets on Valentine's and Mother's Days due to new post-Brexit border checks due to come into force at the end of the month.

Chrysanthemums, carnations and orchids are classified as 'medium risk' imports under EU imports. Capacity fears

Sunak is told UK unprepared for border checks



The Observer

A cold, damp spring depressed plant sales in the UK, but help is at hand from the Glastonbury festival of the gardening world



Preparations get under way for the RHS Chelsea flower show in London. Photograph: Jordan West/PA

The sixth wettest April on record has not been kind to Britain's gardens or its 1,600 garden centres.

So far this year, with most of the key selling season over, garden centre sales are up just 2% on last year and down 11% on 2022, after the sodden spring depressed sales of shrubs, trees, bedding plants and seeds.

Strong sales of tea and cake in cafes and of food in farm shops helped keep many garden centres going through the gloomy weather, while houseplant sales continue to rise after an Instagram led boom in interest during the pandemic. But now the industry is hoping sales will blossom as the Chelsea flower show heralds a belated reboot of the horticultural calendar.

The Horticultural Trades Association (HTA) says it is "all to play for", as almost a quarter of sales of plants, seeds and bulbs were rung up in May last

BBC NEWS

How to make your garden grow on a budget



Industry fears disruption from new exit border checks



Key Stats since we began strategic media

1,300+ items of coverage

130+ direct media requests

Member Engagement

This year our member engagement team has been restructured to cover regions rather than sectors, which allows us to bring members together more effectively from all parts of the industry.

In addition, we have expanded our team with the appointment of a new Member Engagement Manager based in the south east. Now, with full coverage across the UK, the team is ready to serve and support members with information and queries.

The team has enjoyed meeting members at various industry events over the past 12 months, including the HTA National Plant Show and Glee. We have also actively supported numerous smaller events and open days throughout the year. Member engagement managers continue to visit members regularly, providing assistance with a wide range of queries. Contact details for your region's member engagement manager can be found on the HTA website.

Our WhatsApp groups are thriving, now with over 400 participants from across the membership. This platform has become a powerful tool for members to post questions, share advice, and exchange information.

Working closely with our council representatives, several new initiatives have been introduced in 2024. We have launched regional newsletters delivered by council representatives and Member Engagement Managers to keep members updated on local issues that matter to them. Additionally, a new programme of regional events is being introduced throughout the UK covering a variety of topics. These events will provide opportunities for members to meet with the HTA team and each other, discuss challenges and opportunities, and engage in informal networking. Full details are available on the HTA website and will be shared by regional member engagement managers.



Tim Bell
Head of Member Engagement



Jo Gildea
Member Engagement Manager, South West England



Neil Cummings
Member Engagement Manager, Scotland, Wales, Northern Ireland and Northern England



Jeremy Costello
Member Engagement Manager, South East



Martin Simmons
Member Engagement Manager, Central England and Yorkshire



Website Personalisation

In March of this year, we responded to member feedback about content accessibility by making some significant enhancements to the HTA website's navigation. The new navigation is personalised based on each member's business sector, ensuring that Growers, Retailers, and Landscapers can easily find the most relevant content.

There is no limit on the number of logins for contacts within a member business, and we have observed an increase in both the number of users and their engagement frequency since implementing these changes.

Additionally, we conducted a survey to gather user feedback on the website improvements. We are pleased to report that all respondents rated their experience with four or five stars.



Haskins Garden Centre

Consumer Engagement

National Children's Gardening Week 25 May – 2 June 2024

In collaboration with Penguin, we created "Grow with Peter Rabbit" themed activity books and distributed over 61,000 booklets to 234 members. Distribution included point-of-sale materials, social media toolkits, and digital copies of the activity booklet. These resources were highly utilised by members, with 295 downloads of the toolkits and 146 downloads of the digital booklets.

"The booklet supplied from the HTA is greatly received by the children and they loved getting them; some did the activities in them at our event, and everyone took them home."

– Kirktown Garden Centre

We achieved 347 media mentions of National Children's Gardening Week, reaching a potential audience of 44.6 million. By driving consumer traffic to the National Children's Gardening Week website, we successfully promoted all participating members and their events aimed at inspiring the next generation of gardeners. Engagement on these pages exceeded 53%, with a total of 5,360 users.

Inside Horticulture magazine continues to provide a tangible benefit of membership of the association, complementing our range of other communication channels. The magazine demonstrates how we are working on our members' behalf on key policy campaigns, and includes helpful stats and insights, topical features, and case studies.



We produce regular Hort Talk podcasts. Subjects we've covered over the last year include:

- Houseplants
- NIPHL and border control
- Celebrating 125 years of supporting UK environmental horticulture
- Peat free in a retail environment
- Groups and committees

Hort Talk downloads were up

23%
compared to previous year

"I always find the weekly updates and the HTA magazine a useful read."

Member satisfaction survey May 2024

Events



Horticulture, The Conference

Horticulture, The Conference was held at the ICC in Birmingham on 5 October 2023. The theme was 'Growing a Greener Future' and the event included panels and discussions about the value of plants, urban green spaces, making the industry sustainable, careers in horticulture and life beyond peat. It featured a top line up of speakers

including Economist Dr Tim Leunig, Rt hon Mark Spencer MP, Daniel Zeichner MP and Manoj Malde.

One of the most important networking events of the year, our annual conferences are a fantastic opportunity for our industry to come together. The 2024 industry conference will be happening on 25 September 2024.

Garden Press Event

We welcomed over 300 members of the garden press and media to The Garden Press Event in February. Organised jointly with GIMA, the event featured almost 100 exhibitors at the Business Design Centre in London.

Blue Diamond's British-grown houseplants won the 'Best Stand Display' prize.

The Dipping Tank Company emerged victorious in the 'Best New Product' category.



Jill Kerr and Nick Jones from Blue Diamond:
"We are absolutely delighted to be presented with the Best Stand Award at the Garden Press Event for British grown and peat free houseplants and our eco range of coffee pods. We've had a fabulous day meeting so many members of the press and all the different types of communications at the show."



Andrew Cousins from the Dipping Tank Company:
"I'm really pleased to get this award, a bit overwhelmed really - this has gone from an idea I had a few years ago, tinkering away in my spare time, and people telling me I should push it, and here we are, winning an award for it! Thank you very much to everyone that voted."



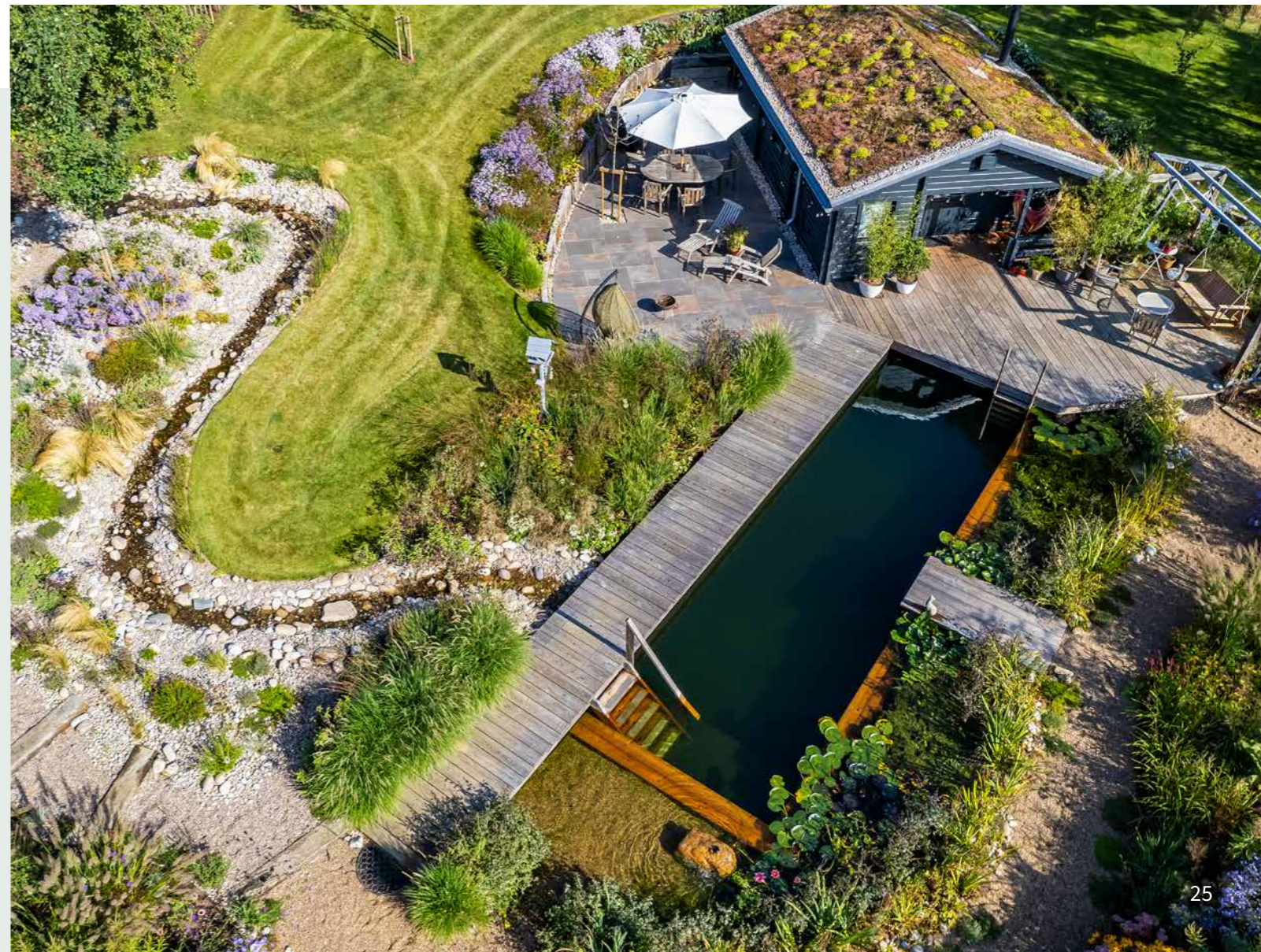
Celebrating 125 years of UK Environmental Horticulture

We began our celebration in February marking the HTA's 125 years of dedicated support for UK Environmental Horticulture. Our CEO Fran Barnes addressed attendees to highlight the association's pivotal role in advocating for industry interests, fostering growth, and the significant economic contribution of the sector.

Ellicar crowned Supreme Winner at 2024 APL Awards

The Association of Professional Landscapers (APL) annual awards ceremony, sponsored by Bradstone, took place in March at the Brewery in London. The sold-out event recognised and celebrated the outstanding landscaping carried out by members of the APL. The awards were hosted by APL General Manager Phil Tremayne, with guest speaker Frances Tophill.

Ellicar took home the top award for their wildlife and water garden in Nottinghamshire. Their task was to create a bright, colourful, naturalistic garden, reminiscent of their client's Kenyan childhood, so they could step outside into nature, support wildlife, enjoy wild swimming, relax and dine outdoors with family and friends.



HTA National Plant Show

Our 2024 event welcomed over a thousand visitors and saw over 248 stands presenting more than 157 companies' products to potential customers across both halls. The event provided businesses with an opportunity to showcase everything from seeds, bulbs, house plants and a wide range of garden plants to labelling and product information, growing media, display benching and machinery.



New plant award winners 2024

The Bransford Webbs Plant Company's *Digitalis purpurea* Apple Blossom was recognised as Best in Show at the New Plant Awards, sponsored by the Royal Horticultural Society (RHS). Farplants Sales Ltd - *Spiraea* WALBERTON'S® PLUM took home the Visitor Vote, sponsored by Floramedia.



Grower of the Year Awards 2023

Announced at Horticulture, the Conference, a total of 9 awards were presented across 5 categories, including overall winners and highly commended.

Allensmore Nurseries was named Best Finished Plants Grower, Greenwood Plants won the Peat Free Grower award, while Majestic Trees won Inspirational Business. Several individual industry professionals were also recognised, with Kyle Ross of Wyevale Nurseries winning Young Grower under 35 and Maria Bengtsson from Majestic Trees winning Best Staff Member.

Environmental impact

HTA solar panels save over 9 tonnes of carbon emissions in first year

Since the solar panels were installed at Horticulture House last year, over 45,000 kWh of clean energy has been generated, saving 9.36 tonnes of CO₂e—equivalent to powering more than 16 average UK homes for a year (Source: Ofgem).

We consumed just over 39,500 kWh, with any excess energy exported to the national grid for further clean energy use. Over the past year, 23% of the total energy consumed at the HTA office has been generated through clean energy sources.

Year	Tonnes CO ₂ e total	Tonnes CO ₂ e per employee	Change from previous year
2020	75.7	2.0	N/A
2021	70.1	1.6	-7%
2022	82.4	2.0	+18%
2023	83.4	1.9	+1%

Note: 2020 and 2021 were marked by COVID lockdowns, making 2022 the first year the HTA operated without pandemic-related disruptions, since we began measuring our footprint in 2020.



With their membership rapidly approaching 1,000 people under 35, the Young People in Horticulture Association held a networking event at the HTA National Plant Show, which provided a chance for visitors to speak to their committee members, meet other young people in the industry, and engage with industry supporters.



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