



Market Update

March 2025

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Overview

- Overall sales were down -1% from February 2024, but up +3% from February 2023. It's important to note however, that February 2024 included an extra day of trade given the leap year, which artificially depresses the comparisons somewhat for February 2025.
- February 2025 continued to display stark divide between different areas of the garden centre. Gardening categories continued to underperform as seen in January 2025, with February sales down -10% compared to February 2024.
- In contrast, non-gardening category sales generally outperformed previous years by a notable margin, even without the support of catering categories. Non-gardening excluding catering was up +2% from February 2024, and up +7% from February 2023 despite having one fewer trading day.
- Sales growth in garden centre cafes and restaurants continued to demonstrate signs of slowing down, but remains steady. Catering remains an important revenue stream for many retailers, demonstrated by its February category share in 2025 overtaking live plants following sustained growth over the last 4 years. See page 11, a new page featuring monthly share of turnover by different garden centre categories.
- Consumer confidence rose 2 points from January 2025, with all measures of confidence rising across the board. The Bank of England's interest rate cut is likely to have provided a boost, but inflation remains high, utility bills are rising, and many are still struggling with the cost of living. A high savings index score suggests many consumers are looking to save rather than spend.
- The weather in February was equally mixed . Although February 2025 saw more sunlight hours and less rainfall than previous years, average UK temperatures were down almost -2°C compared to February 2024. It's likely that the cold weather, particularly the lingering overnight frosts, continued the trend of consumers avoiding live plant purchases until temperatures improve.
- Overall, February continued to paint a mixed picture for garden centres. With live plant sales currently lagging well behind previous years, an improvement in gardening sales will be pivotal for garden centres in the spring, particularly if non-garden categories continue to perform strongly. The demand for gardening products is evidently high, with the end of February and March having gotten off to a strong start as the sun shone.
- **Read on for the detail...**

Key Points:

February 2025

Overall sales were down -1%
in February 2025 vs
February 2024

Catering growth continues to show signs of slowdown
although total sales still increased

Consumer confidence rose 2pts
with all confidence measures rising from January 2025

Non-gardening sales were up +3% compared to February 2024
despite fewer trading days compared to last year

Gardening sales continued to perform poorly
with year-to-end of February sales down -9% compared to 2024

Garden Centre Sales

February 2025

In February 2025, overall garden centre sales were down -1% from February 2024, but up +3% compared to February 2023. When catering was excluded, overall sales were down -5% compared to both February 2024 and 2023. February 2024 benefitted from an extra day of trade however, so it would be expected that February 2025 would perform worse in comparison.

Last month, we reported that gardening categories were down -12% from January 2024. This poor performance was carried through into February, with gardening sales down again: by -10% from February 2024 and -14% from 2023. February 2025 was almost -2°C colder on average than last February, resulting in cautious spending from consumers in the gardening area. January and February are small months in the grand scheme of the calendar year for gardening, so there is plenty of time for the trend to be turned around as the weather becomes kinder in Spring.

In contrast, non-gardening items continued to sell well, with sales value up +3% compared to 2024 and +16% from 2023. When catering was excluded from this, non-gardening sales were still up +2% from 2024, and up +7% from 2023.

	Overall <i>Incl. catering</i>	Overall <i>excl. catering</i>	Garden/ gardening	Non-garden /gardening <i>Incl. catering</i>	Non-garden /gardening <i>Excl. catering</i>
<i>Feb 2025 vs Feb 2024</i>	-1%	-5%	-10%	+3%	+2%
<i>Feb 2025 vs Feb 2023</i>	+3%	-5%	-14%	+16%	+7%

How are these figures calculated?

The national sales figures we report each month come from our HTA Garden Retail Monitor (GRM) systems. We have an EPOS-based system where sales data from submitting garden centres are automatically uploaded to a secure server; and a manual-entry version to which we cross-reference the figures. Participating garden centres can login to a portal to benchmark their sales against regional and national averages for a variety of sales metrics. We're always looking to sign up more garden centres to the EPOS system, allowing us to include reliable and detailed breakdowns of trends in sales within these Market Update reports.

If you're interested or looking for more information, visit: hta.org.uk/grm

(For this edition, we used **median** values from submitting stores; reported changes are in **sales value excluding VAT**)

Source: HTA Garden Retail Monitor

Garden Centre Sales Volumes

February 2025

Overall sales volumes were positive in February 2025, with a +4% increase on 2024, despite the month having one fewer trading day. However, when excluding catering, sales volumes were down -7% from 2024 and -9% from 2023.

Significantly lower quantities of garden/gardening items were sold in February 2025 compared to previous years, down -14% from 2024 and -17% from 2023, mirroring the poor sales value performance. February is a small month for gardening products however, so this is unlikely to have a significant impact on annual turnover.

January 2025 saw particularly low temperatures across the UK, and February was similarly cold, with temperatures down almost -2°C compared to February 2024. The cold weather appeared to particularly affect sales of live plants (see page 9), driving the poor performance behind the gardening category.

Conversely, sales volumes non-gardening categories continued to outperform previous years, up +10% from February 2024 and up +16% from 2023. Catering sales were key in this growth, but non-garden sales quantities were still up +6% from February 2023.

	Feb 2025 vs Feb 2024		Feb 2025 vs Feb 2023	
	Sales Value (£, Exc. VAT)	Sales Volume (n)	Sales Value (£, Exc. VAT)	Sales Volume (n)
Overall <i>Incl. catering</i>	-1%	+4%	+3%	+7%
Overall <i>Excl. catering</i>	-5%	-7%	-5%	-9%
Garden/ gardening	-10%	-14%	-14%	-17%
Non-garden/ gardening <i>Incl. catering</i>	+3%	+10%	+16%	+16%
Non-garden/ gardening <i>Excl. catering</i>	+2%	0% (=)	+7%	+6%

(For this edition, we used **median** values from submitting stores)

Sources: HTA Garden Retail Monitor

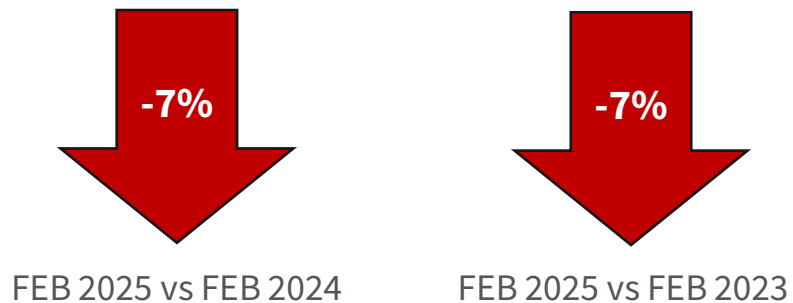
Average Transaction Values (ATVs) and Transaction Numbers

In the garden store; February 2025

Transaction numbers in February 2025 were down -7% from both February 2024 and February 2023 respectively. Although February 2025 had one fewer trading day than the previous year, there was an evident decline in garden store transactions being made in February 2025.

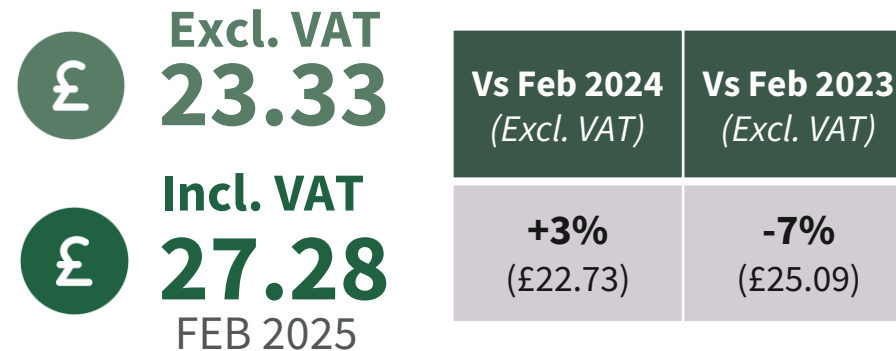
January's garden store ATVs were at a 3-year-low in 2025. However, February showed signs of recovery, with average consumer spend having increased by +3% compared to 2024 (£22.73), but were still down -7% from 2023 (£25.09). Although the slight rise in average spend is positive, the decline in total transactions highlights consumers opting to save rather than spend (see page 18).

Transaction Numbers (Garden Store):



(For this edition, we used **median** values from submitting retailers)

Average Transaction Values (ATVs) (Garden Store):



Source: HTA Garden Retail Monitor

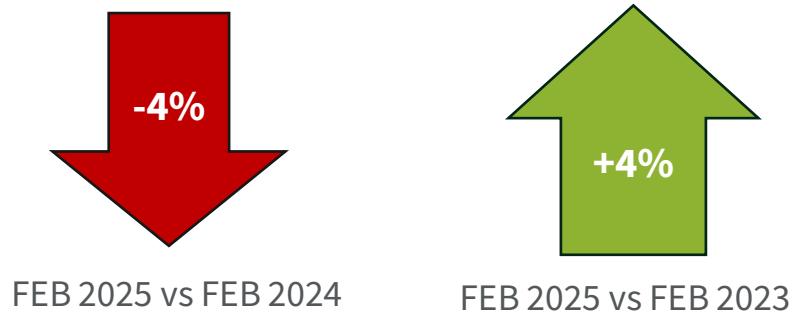
Average Transaction Values (ATVs) and Transaction Numbers

In the café/restaurant; February 2025

Similar to January 2025, café/restaurant transactions continued to show signs of slowing down in February 2025. Total transactions fell -4% compared to 2024, although this is likely a consequence of Feb 2024 having an extra day of trade. Compared to 2023, total café transactions were up +4%, continuing the trend of slower growth in the catering category.

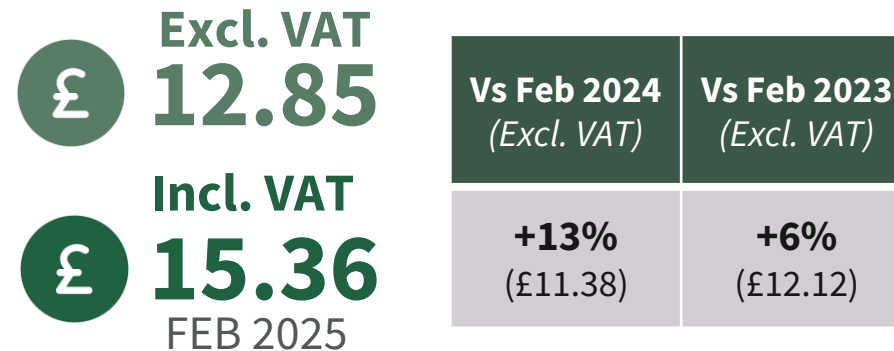
While transaction numbers showed signs of slowing, average café transaction values rose by +13% compared to 2024 (from £11.38 to £12.85). The rise in ATVs appeared to mainly be influenced by price increases and inflation, rather than customers opting for higher priced items or purchasing more products in a single transaction.

Transaction Numbers (Café/Restaurant):



(For this edition, we used **median** values from submitting retailers)

Average Transaction Values (ATVs) (Café/Restaurant):



Source: HTA Garden Retail Monitor

Garden Centre Sales

February garden/gardening breakdowns

In February 2025, all garden/gardening category sales were on-par or down compared to 2024, continuing the trend seen in January 2025. In particular, live plants sold well below the levels seen in previous years, with bedding sales down -17% and hardy plants down -15% relative to 2024, albeit in a relatively small month for this category.

As mentioned on page 6, the continued cold weather likely dissuaded consumers from purchasing live plants, despite the lower rainfall and more hours of sunshine compared to 2024.

With consumers avoiding live plant purchases, there was likely a knock-on effect for the sales of plant care products, garden tools, and outdoor containers (all down -11% on 2024). End of Feb sales, when the weather began to improve, were encouraging, and March started strongly, suggesting good levels of demand for gardening despite these figures.

Gardening categories that are typically bought in advance of spring also underperformed compared to previous years, albeit to a lesser extent. Seed sales were down -8%, however bulbs showed more resilience, only falling -2% compared to 2024.

Moreover, garden features and structures sold similar amounts to previous years—on par with February 2024 and up +3% from February 2023—although this category only makes up a small proportion of the wider gardening category.

(For this edition, we used **median** values from submitting retailers)

Category	Feb 2025 vs 2024	Feb 2025 v 2024 YTD	Feb 2025 vs 2023
Bedding plants	-17%	-15%	-14%
Hardy plants, shrubs & trees	-15%	-14%	-19%
Indoor plants	-6%	-8%	-4%
Bulbs	-2%	-2%	+11%
Seeds (excl. grass seed)	-8%	-6%	-11%
Plant care products	-11%	-10%	-12%
Garden tools & equipment	-11%	-10%	-18%
Garden features & structures	0% (=)	0% (=)	+3%
Outdoor containers	-11%	-12%	-19%

Source: HTA Garden Retail Monitor

Garden Centre Sales

February non-garden/gardening breakdowns

In stark contrast to the gardening categories, non-gardening category sales were broadly up in February 2025 compared to previous years. Catering sales were up +8% from February 2024, and +22% up from February 2023, underlining the continued yet slowing growth seen in the category. For context, previous editions of Market Update have put catering growth at around +15% year-on-year.

Food and farm shop items also sold well in February 2025, with the category up +8% compared to 2024 and up +22% compared to 2023. The indoor living category was also up +4% in February, compared to 2024, whilst wild bird care items sold on-par with February 2024, up +11% from 2023.

Gifting and pet categories were down slightly from 2024, although were up +7% and +5% from February 2023 respectively. Once again, this is likely a product of the extra day of trade present in 2024, masking the strong performance of these categories in February 2025.

Given the effect of the leap year, the strong sales performance relative to February 2023 paints a largely positive picture for the performance of non-garden products, particularly in light of weaker gardening category sales.

Category	Feb 2025 vs 2024	Feb 2025 v 2024 YTD	Feb 2025 vs 2023
Indoor living & homewares	+4%	-2%	+6%
Gifting	-3%	-1%	+7%
Wild bird care	0% (=)	-1%	+11%
Pets	-2%	+5%	+5%
Food & farm shop	+8%	+7%	+22%
Catering	+8%	+6%	+25%

(For this edition, we used **median** values from submitting stores)

Source: HTA Garden Retail Monitor

Retailer Category Shares

February

This page introduces a new section to Market Update, looking at the monthly share of turnover that different categories make up within the garden centre. This information helps contextualise changes within categories and their significance, with respect to the overall monthly sales.

The share of catering sales within the month of February has grown every year since 2023 (including from February 2022, where it had a 15% share), demonstrating how the importance of cafes and restaurants in garden centres has grown in recent years.

February 2025 marked the first February where catering sales exceeded the sales of live plants, bulbs, and seeds, making catering the largest category by turnover within garden centres, although only by a small margin.

Other item categories broadly display stability year-on-year, apart from the outdoor living category, which has seen its February share decrease somewhat in the last couple of years.

In March 2025, live plants, bulbs, and seeds are expected to regain the largest monthly share. However, it will be interesting to see how catering performs amongst other gardening categories, such as garden care, and garden containers and structures.

Category	Feb 2025	Feb 2024	Feb 2023
Catering	22%	20%	17%
Live plants, bulbs, and seeds	21%	23%	23%
Other non-garden products	11%	10%	9%
Homewares and floristry	8%	8%	8%
Garden care and maintenance	8%	9%	9%
Food hall and farm shop	7%	6%	6%
Gifts/giftwares	6%	6%	5%
Garden containers and structures	5%	5%	6%
Outdoor living	5%	6%	9%
Wild bird care, pets, and aquatics	5%	5%	4%
Other garden products	2%	2%	2%
Miscellaneous	2%	1%	1%

Source: HTA Garden Retail Monitor

Garden Centre Sales

Calendar year to date; February 2025

Looking at total garden centre sales since the start of 2025, overall sales are down -1% from 2024 and up +2% from 2023 at this point in the year. Catering has filled most of the shortfall across the garden/gardening categories, although non-gardening sales are up +3% from 2024 and up +6% on 2023 at this point in the calendar year.

Gardening category sales have been down considerably since the start of 2025, having been observed in January’s edition as well as February’s. Although gardening sales are generally low across January-February, the poor start to the year for gardening sales will likely be reflected in the calendar year-to-date figures in the coming months. Given the relatively small size of gardening categories in the winter months however, recovering the lost ground may not pose a significant challenge to garden centres.

	Overall <i>Incl. catering</i>	Overall <i>excl. catering</i>	Garden/ Gardening	Non-garden /gardening <i>Incl. catering</i>	Non-garden /gardening <i>Excl. catering</i>
Feb 2025 vs Feb 2024	-1%	-2%	-9%	+6%	+3%
Feb 2025 vs Feb 2023	+2%	-4%	-10%	+11%	+6%

How are these figures calculated?

The national sales figures we report each month come from our HTA Garden Retail Monitor (GRM) systems. We have an EPOS-based system where sales data from submitting garden centres are automatically uploaded to a secure server; and a manual-entry version to which we cross-reference the figures. Participating garden centres can login to a portal to benchmark their sales against regional and national averages for a variety of sales metrics. We’re always looking to sign up more garden centres to the EPOS system, allowing us to include reliable and detailed breakdowns of trends in sales within these Market Update reports.


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(For this edition, we used **median** values from submitting stores, given that February is a small month for garden centres, resulting in volatility in percentage changes between retailers. January’s report included the aggregate means, and are therefore not directly comparable to these year-to-date figures; reported changes are in **sales value excluding VAT**)


Source: HTA Garden Retail Monitor


Weather

In February 2025, the first half of the month was cold, with temperatures below average. A shift mid-month led to a warmer second half and overall temperatures 0.5C above average, albeit significantly cooler than February 2024. February also saw 76% of the long-term average rainfall and was considerably drier than February 2024. Meanwhile, sunshine hours were just below average (93%).

	Feb 2025	Feb 2024
	67.0	56.7
Hours of sunshine		

	Feb 2025	Feb 2024
	72.7	139.8
Rainfall (mm)		

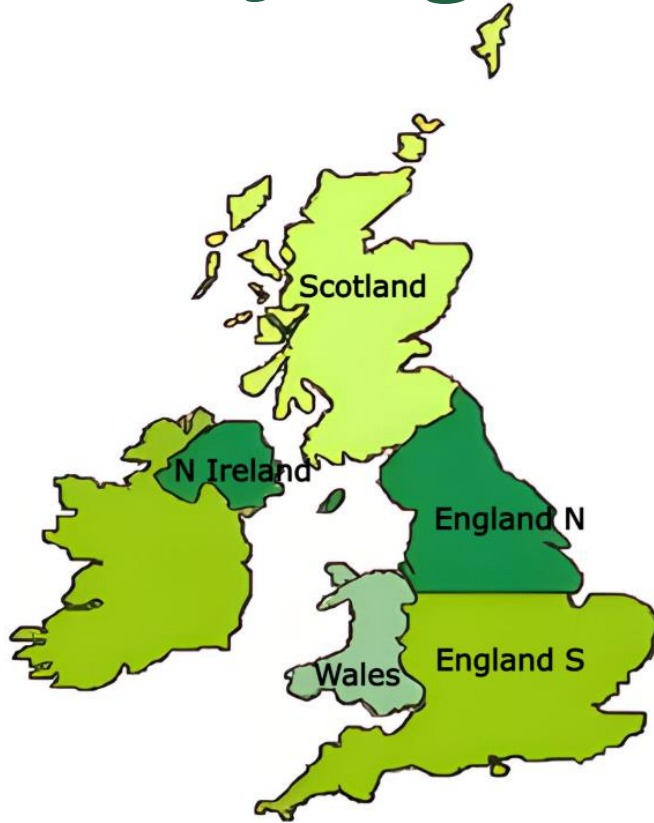
	Feb 2025	Feb 2024
	11.1	17.4
No. of rain days		

	Feb 2025	Feb 2024
	4.6	6.3
Mean temperature (Celsius)		

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.

Source: MET Office

Weather by region



Region	Mean Temp (Degrees Celsius)	Sunshine Hours	Rainfall (mm)
Overall	4.6	67.0	72.7
South England	5.2	69.5	56.8
North England	4.6	63.8	43.5
Wales	4.8	68.1	90.3
Scotland	3.8	65.8	102.6
Northern Ireland	5.6	66.4	71.2

Overall, the UK was much drier in February 2025. In particular, Wales saw 43% of the long-term average rainfall, whilst Northern England was considerably drier than February 2024. Northern Ireland was warmer than the UK average.

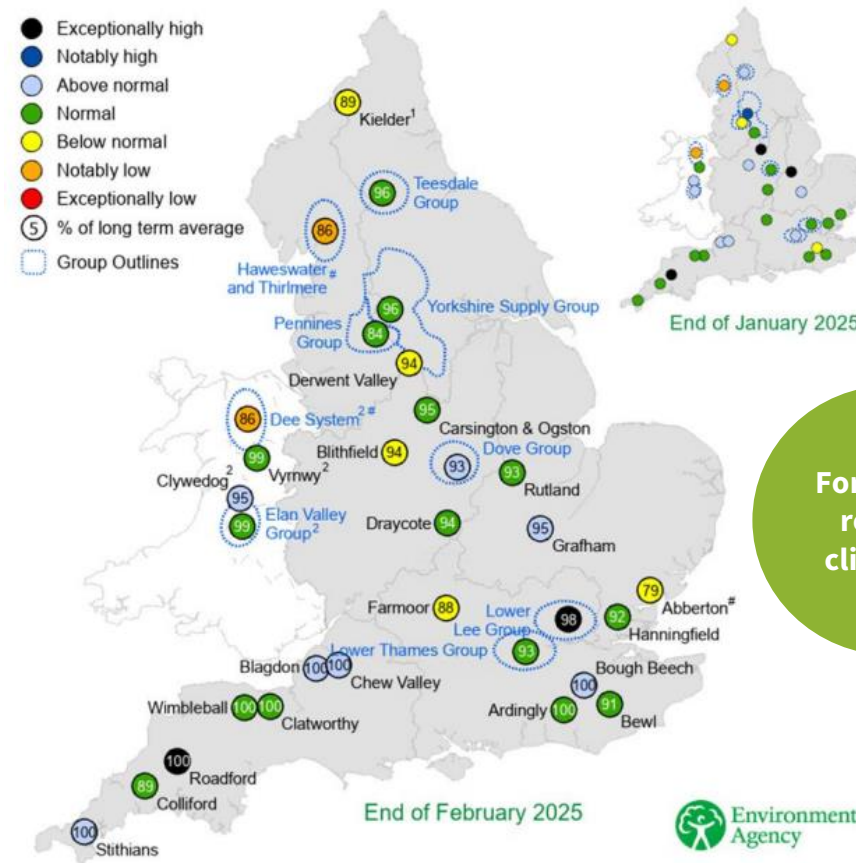
Source: MET Office

Current reservoir levels

Across the UK, reservoir storage levels ranged from notably low to exceptionally high.

Fifteen reservoirs were reported to be normal, seven were above normal and five were below normal.

Total storage across England was at 92% at the end of February.



For the full reports click here

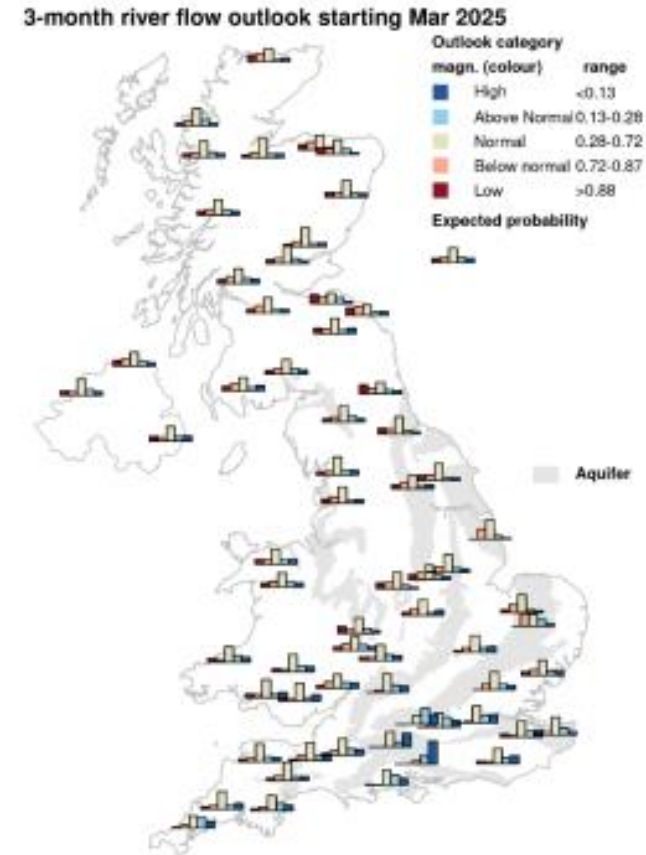
Source: Environment Agency

Forecast river flows

In the 3-month river flow outlook starting March 2025, flows are likely to be normal to above normal across southern England.

In northeastern England and eastern Scotland, river flows are expected to be normal to below normal.

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.



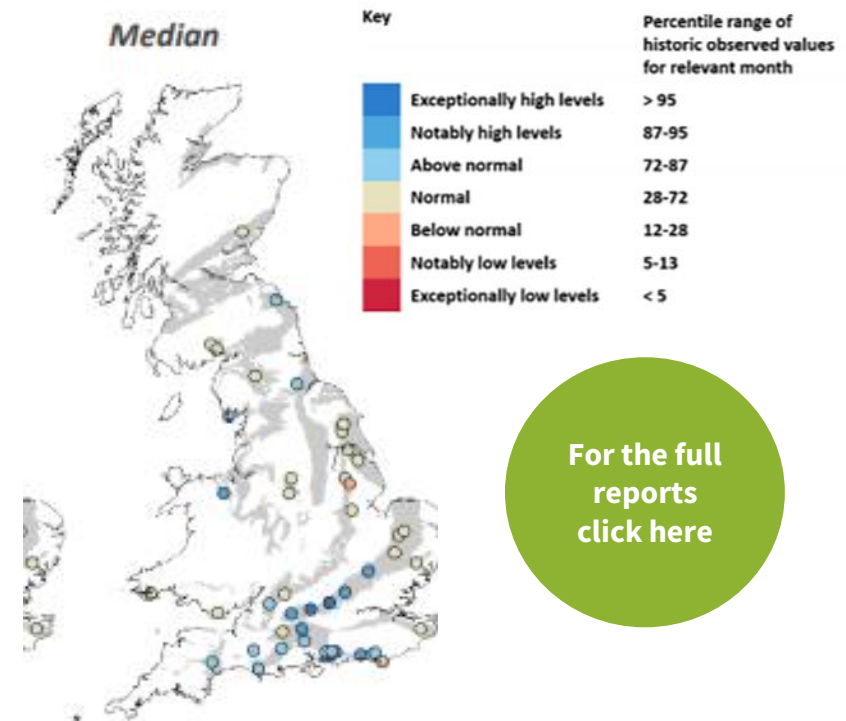
[For the full reports click here](#)

Source: Centre for Ecology and Hydrology

Forecast groundwater levels

Three-month groundwater outlook starting March 2025 (based on median rainfall forecasts)

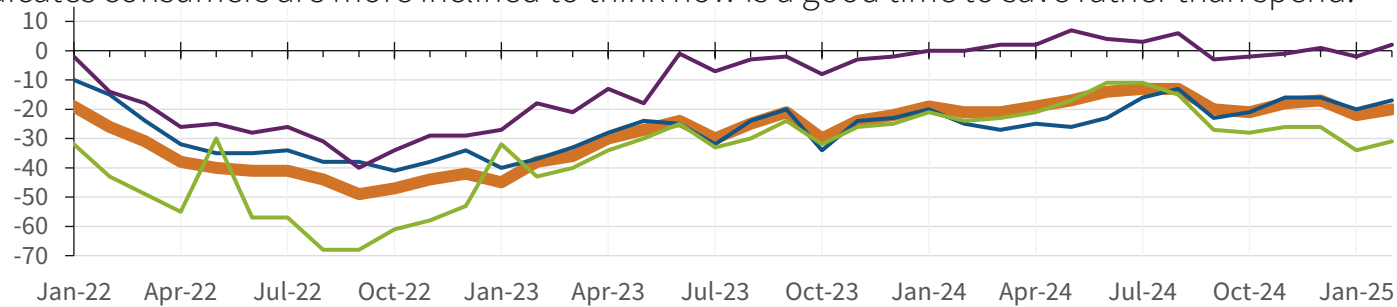
Under median rainfall conditions, groundwater levels are predicted to stay within normal conditions over the three months from March 2025, however levels in southern England are expected to remain above normal.



Source: Centre for Ecology and Hydrology

Consumer Confidence

Consumer confidence increased by 2 points in February 2025. All measures increased from January, with the biggest improvement seen in consumer ratings of their personal financial situation over the next 12 months (+4pts). The Bank of England’s interest rate cut is likely to have provided a boost, but inflation remains high, utility bills are rising, and many are still struggling with the cost of living. Ratings of the UK’s general economic situation remain lower than 2024, meanwhile the high Savings Index indicates consumers are more inclined to think now is a good time to save rather than spend.



Overall index score for Feb: **-20**

***this is 2 points higher than Jan 2025**

Measure	Relative score (February 2025)	vs. Jan 2025
<u>Personal financial situation:</u> during last 12 months over next 12 months	-7 +2	3 points higher 4 points higher
<u>General economic situation:</u> during last 12 months over next 12 months	-44 -31	2 points higher 3 points higher
Major Purchase Index	-17	3 points higher
Savings Index	30	Equal

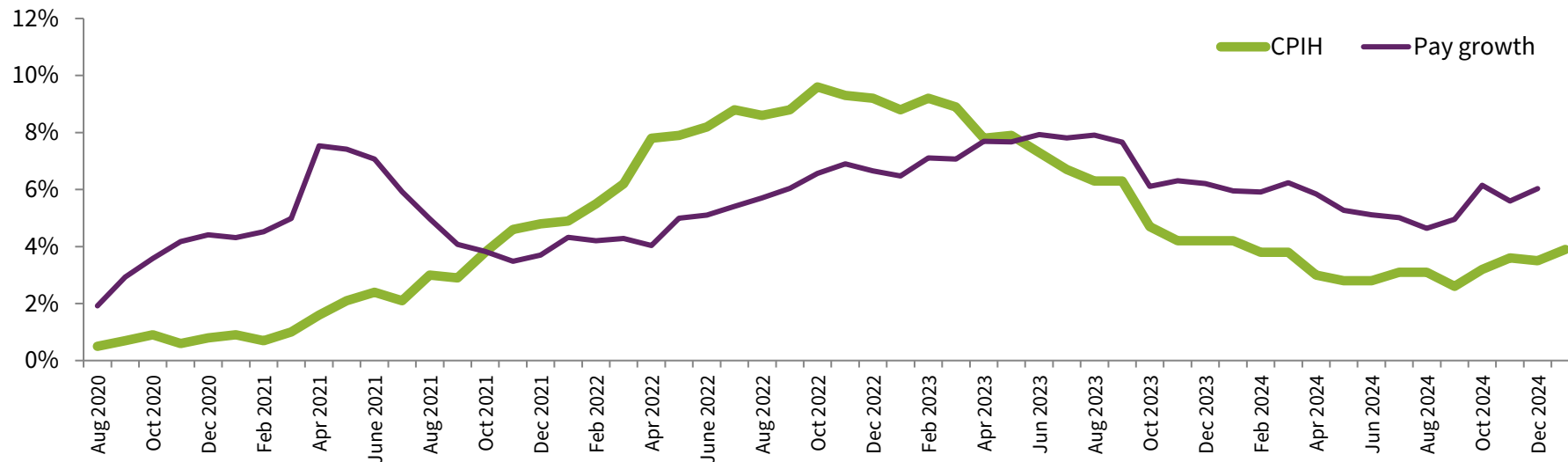
Consumers are asked how the financial position of their household has changed over the last year and is expected to change in the next year, as well as that of the general economy. They’re also asked if they believe ‘now’ is a good time to make major purchases or to be saving money. The first three measures 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.**

Base: 2,011 UK Individuals aged 16+, interviewed Jan 31st – Feb 13th 2025.

Source: NIQ & GfK

Inflation and Wages

Each month, we report on the latest official Consumer Prices Index including owner occupiers' housing costs (CPIH) inflation rate, which was 3.9% in January 2025, representing a 0.4% increase from December 2024. Average earnings growth was 5.9% between October and December 2024, tracking consistently above the rate of CPIH inflation. This real-terms wage growth provides some relief for households, but the keeping up with the wage bill continues to put pressure on businesses. The unemployment rate remained relatively stable at 4.4%, indicating a tight labour market.



CPIH inflation (Jan 2025)
3.9%

Average Weekly Earnings: Regular pay growth (Dec 2024)
6.0%

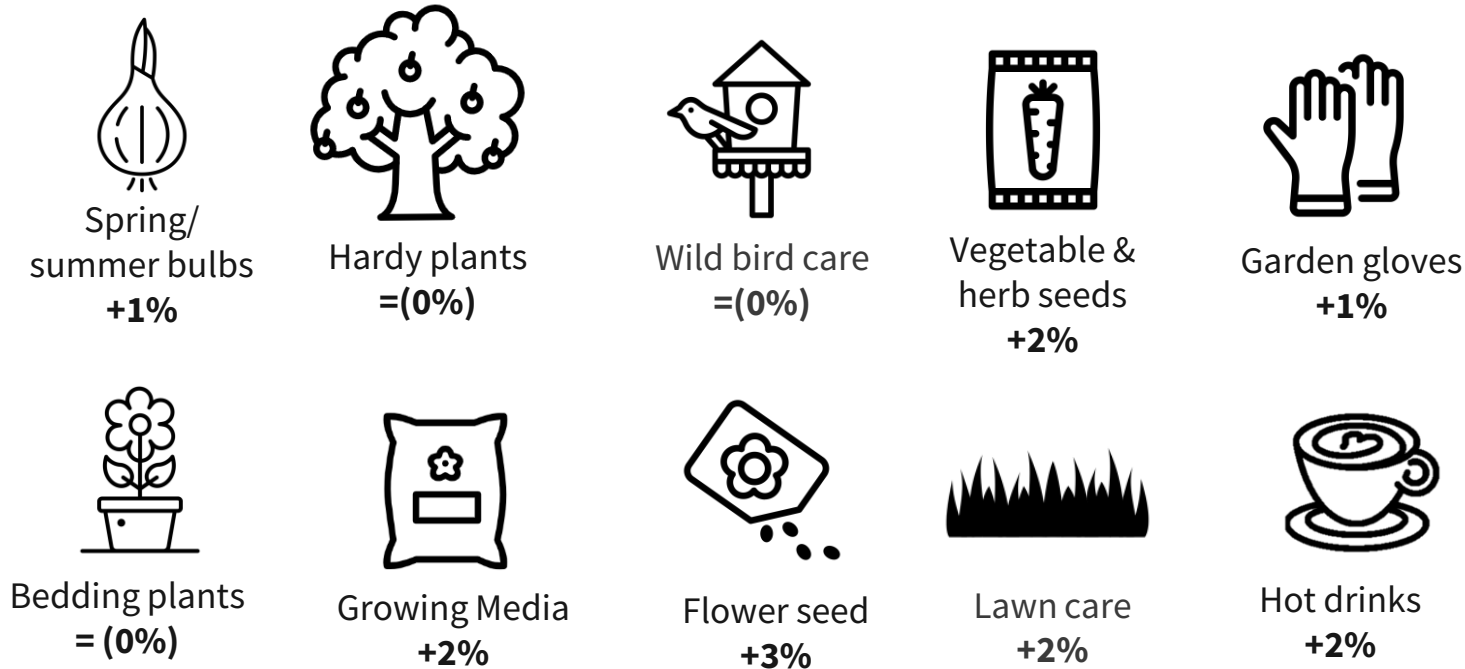
Unemployment Rate (Oct-Dec 2024)
4.4%

Sources: gov.uk

Retail inflation on garden products

Our February Trolley

(February 2025 vs February 2024 price inflation)



Our analysis compares the prices of individual items transacted in garden centres between February 2024 and February 2025. We calculated a **median inflation rate** across each category featured in our seasonal trolley. The 'trolley' of goods selected is intended to be seasonally appropriate, as a model of the level of price inflation in consumer's baskets.

Between February 2024 and February 2025, our trolley selection had low price inflation. Flower seeds showed price inflation of (+3%) while growing media, lawn care and vegetable herbs & seeds all showed price inflation of (+2%) each. Spring bulbs and garden gloves showed a (+1%) rise in price inflation.

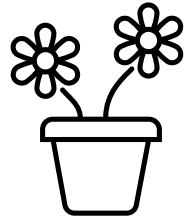
On the other hand bedding plants, hardy plants, and wild bird care maintained their prices on par with February 2024.

In the cafés/restaurants, hot drinks experienced slight price inflation (+2%) likely due to rising ingredient and staffing costs.

Source: HTA Garden Retail Monitor

Retail inflation on plants

(February 2025 vs February 2025 price inflation)



Flowering Houseplants
-1%



Pot Bedding
+6%



Foliage Houseplants
=0%



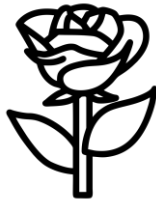
Shrubs
=0%



Pack Bedding
+2%



Herbaceous
+2%



Roses
=0%



Conifers
+11%



Climbers
+6%



Fruit trees & bushes
=0%

Here we look at retail price inflation across various plant categories, comparing February 2025 with February 2024. The data reveals significant price variation amongst our basket.

Conifers (+11%) saw significant price increases year-on-year followed by pot bedding (+6%), and climbers (+6%)

Herbaceous (+2%) and pack bedding (+2%) showed a slight rise in prices

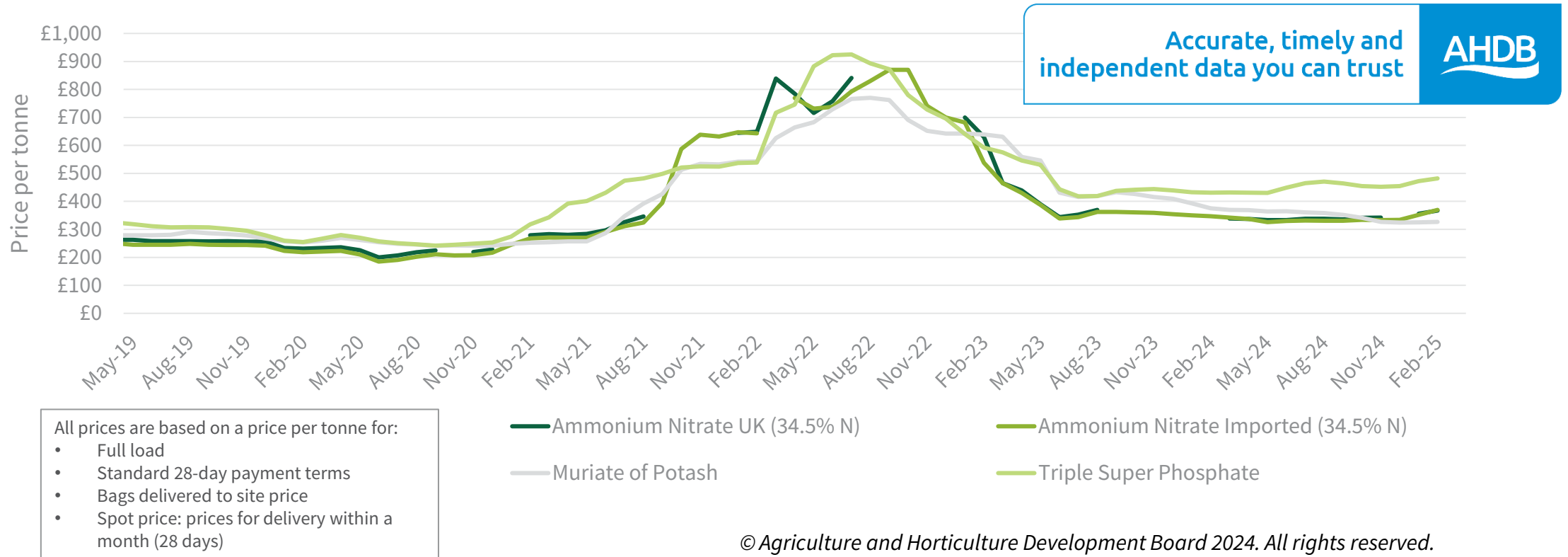
On the other hand, foliage houseplants, shrubs, roses, fruit trees & bushes maintained their prices on average with February 2024.

Flowering houseplants prices fell slightly (-1%) when compared to February 2024.

Source: HTA Garden Retail Monitor

GB Fertiliser Prices

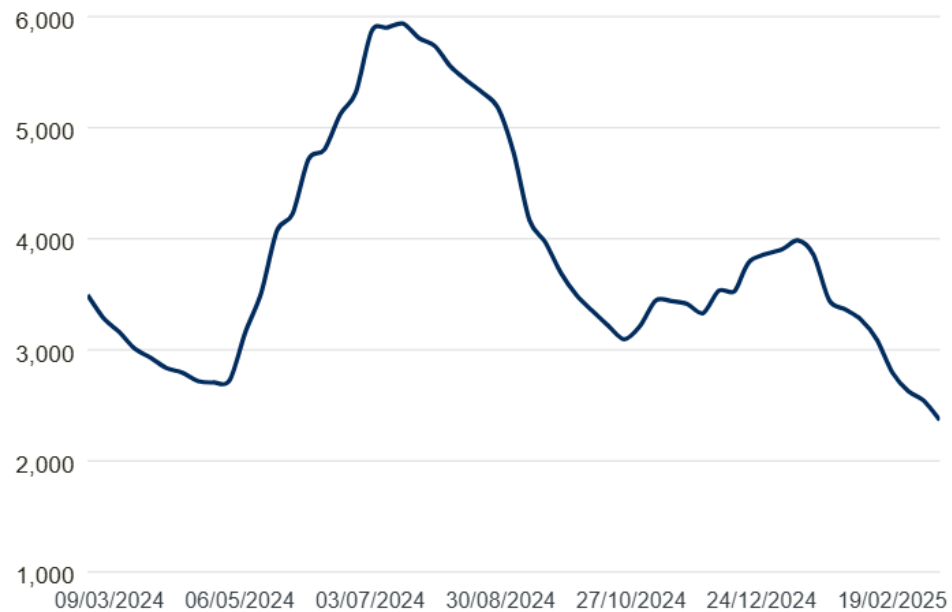
Fertilisers are a major input cost in plant production and rising costs increase the likelihood of squeezed margins through the supply chain. Using data supplied by the AHDB, the below graph shows how straight fertiliser prices have changed since 2019. Whilst those included are not typically used in 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. Overall fertiliser costs have remained (comparatively) stable over the last year. The cost of the key components tracked remained like those seen a year ago, and substantially below the peaks of 2022.



Shipping container prices

We report on a composite index which is an aggregate of shipping costs across various routes. The Drewry's World Container Index was at \$2,368 for a 40ft container as of 13th March 2025, with prices on a downward trajectory since the beginning of 2025. These prices were still \$300 higher than the 10-year average with the war impacting shipping routes in avoidance of the Red Sea, but the downward trend in prices for now relieves some pressure on businesses importing goods.

Drewry World Container Index (WCI) - 13 Mar 25 (US\$/40ft)



\$2,368

We are reporting on the aggregate of the major shipping routes.

Source: Drewry

Closing Comments

Get in touch

We hope you enjoyed the format and content of this Market Update. If you have any questions or would like to see anything else included in future reports, please get in touch



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