



Market Update

April 2025

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Overview

- March 2025 was an impressive and welcomed month for garden centre trade. Overall sales excluding catering were up +23% compared to March 2024, and up +43% compared to March 2023. This rise in sales occurred despite March 2024 partially benefitting from Good Friday and Easter Saturday trade – Easter Sunday did fall on the final day of March in 2024 resulting in one fewer trading day for garden centres, but when the extra day was excluded from our 2025 analysis there was little change in the strength of performance in 2025. March 2025's strong sales were largely driven by the weather increasing footfall in garden centres.
- The calm and sunny weather throughout March was critical in boosting garden centre sales, particularly across gardening categories, with sales up +31% compared to 2024 and +57% compared to 2023. March 2025 was the UK's third-sunniest March since records began in 1910, and England's sunniest on record. By comparison, March 2023 and 2024 were much wetter, which decreased demand for gardening products in those years.
- With the good weather bringing increased footfall to garden centres, catering sales also grew – rising +16% compared to 2024 and +35% compared to 2023. This marks a return to form for garden centre cafes and restaurants, following flat months in January and February.
- March 2025's average transaction value was up +6% compared to 2024 in the garden store, whilst transaction numbers were up +16% compared to 2024. Strong sales across the BBQ and outdoor furniture categories were a key driver in increasing average transaction values.
- In contrast, consumer confidence remains low at -19 points, although consumers' preference to save rather than spend appears to be declining with a 5 point fall in the savings index. Recent market volatility is not reflected in these scores, and consumer confidence may become increasingly fragile in the coming months if wider market forces compound the existing cost-of-living pressures.
- Overall, a strong March 2025 recovered the lacklustre sales seen in January and February, with overall sales up +12% by value compared to 2024 for the year to end of March. With the boost of an Easter weekend yet to come, there is plenty of optimism for the season ahead. Given that many consumers have now made an initial investment into their outdoor spaces for the year, the hope will be that spending remains high throughout the coming months.
- **Read on for all the detail...**

Key Points

March 2025

Overall sales were up +21% by value compared to March 2024,
and up +23% when excluding catering

Sales of gardening products were up +31% by value
compared to March 2024

Catering sales rose +16% by value,
benefitting from boosted footfall in the good weather

March 2025 was the UK's 3rd sunniest March
since records began in 1910

Overall consumer confidence remains low at -19 points,
and may be fragile following recent market volatility

Garden Centre Sales

March 2025

Following a slow start to 2025, sales performance for garden centres was substantially better in March 2025, the improved weather leading to a boom in sales of gardening items. Overall garden centre sales were up +21% from March 2024 despite Good Friday and Easter Saturday falling in March in 2024, and up +40% compared to March 2023. 2024’s Easter Sunday fell on March 31st resulting in one fewer trading day, but when the extra trading day was excluded from 2025 there was minimal difference in the strength of performance in March 2025. When catering is excluded, overall sales were up +23% from both March 2024 and up +43% from 2023, as most gardening categories outperforming the rise seen in catering (see pages 9-10).

Gardening categories, which were down notably in the small months of January and February, saw the most significant turnaround. Gardening sales were up +31% from March 2024 and an impressive +57% from March 2023. Calm and sunny weather was pivotal in generating these strong gardening sales (see page 13), with both March 2024 and 2023 suffering from poor weather, particularly over the Mothering Sunday weekends.

Non-gardening items continued to perform positively, with sales value up +10% compared to 2024 and +25% from 2023. When catering is excluded, non-gardening sales were still up +7% from 2024, and up +18% 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>
Mar 2025 vs Mar 2024	+21%	+23%	+31%	+10%	+7%
Mar 2025 vs Mar 2023	+40%	+43%	+57%	+25%	+18%

(Reported changes are in **sales value excluding VAT**)

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

Source: HTA Garden Retail Monitor

Garden Centre Sales Volumes

March 2025

Given the major increases in sales value seen over March 2025, sales volumes followed a similar pattern. This means that most of the rises in sales was driven primarily by increased footfall and/or basket sizes, rather than by inflation.

Overall sales by volume including catering were up +18% compared to March 2024, and up +33% compared to March 2023. When excluding catering, sales volumes were up +20% and +37% from March 2024 and 2023 respectively.

Mirroring the growth in sales value, gardening categories were up +30% in sales volume compared to March 2024. The strong performance of gardening categories is hugely significant for garden centres, with March being a big month for retailers with the start of the gardening season.

Sales volumes for non-gardening products were also up on March 2024 and 2023, albeit by a smaller extent than the gardening category.

Given that Good Friday and Easter Saturday occurred in March 2024, the strong performance across all categories is particularly notable, as this year's March has not yet benefited from the boost of Easter trade. However, good weather across Mothering Sunday likely went a long way in offsetting last year's Easter trade.

	Mar 2025 vs Mar 2024		Mar 2025 vs Mar 2023	
	Sales Value (£, Exc. VAT)	Sales Volume (n)	Sales Value (£, Exc. VAT)	Sales Volume (n)
Overall <i>Incl. catering</i>	+21%	+18%	+40%	+33%
Overall <i>Excl. catering</i>	+23%	+20%	+43%	+37%
Garden/ gardening	+31%	+30%	+57%	+56%
Non-garden/ gardening <i>Incl. catering</i>	+10%	+12%	+25%	+23%
Non-garden/ gardening <i>Excl. catering</i>	+7%	+5%	+18%	+11%

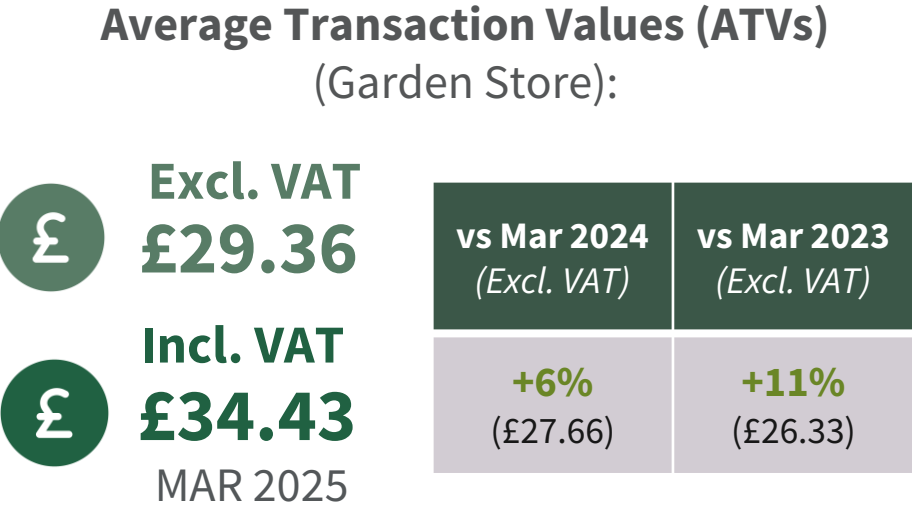
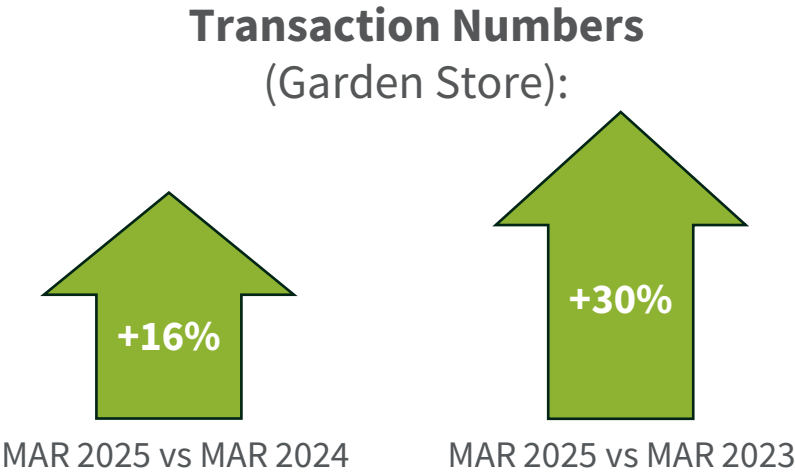
Sources: HTA Garden Retail Monitor

Average Transaction Values (ATVs) and Transaction Numbers

In the garden store; March 2025

Following strong sales, the number of transactions in the garden store was up +16% from March 2024, and up +30% from March 2023. Comparing with the change in sales volumes, this suggests that the main driver behind the strong sales was an increase in customer footfall and transactions, which comes as no surprise given March 2024 was considerably wetter, leading to less appetite for gardening. An increase in footfall bucked the trend across the UK retail sector, with the British Retail Consortium having reported a decline of footfall of 5.4% across UK retail in March 2025.

Average consumer spend also rose to £29.36 (excl. VAT), up +6% on March 2024 (£27.66) and up +11% on March 2023 (£26.33). These rises are likely a product of strong sales across the garden furniture and BBQs categories: both high-value categories that performed well following the good weather, helping to further increase customer basket sizes.



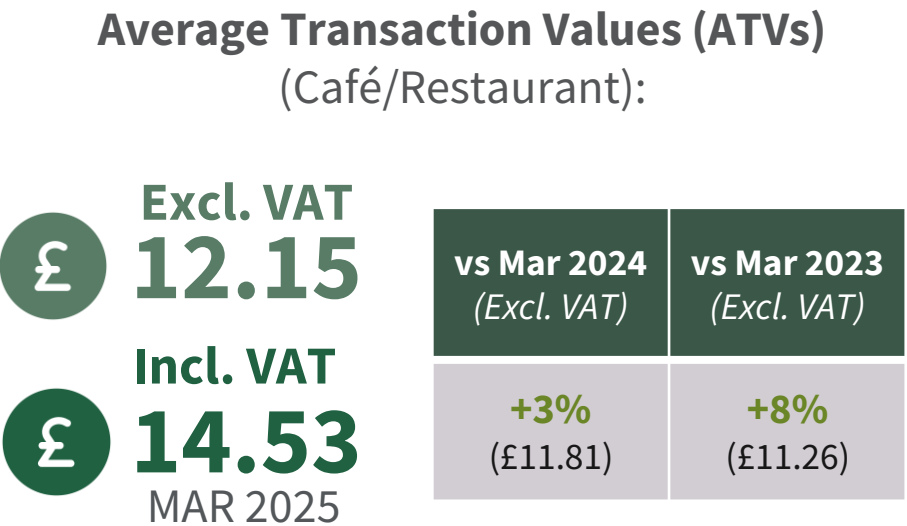
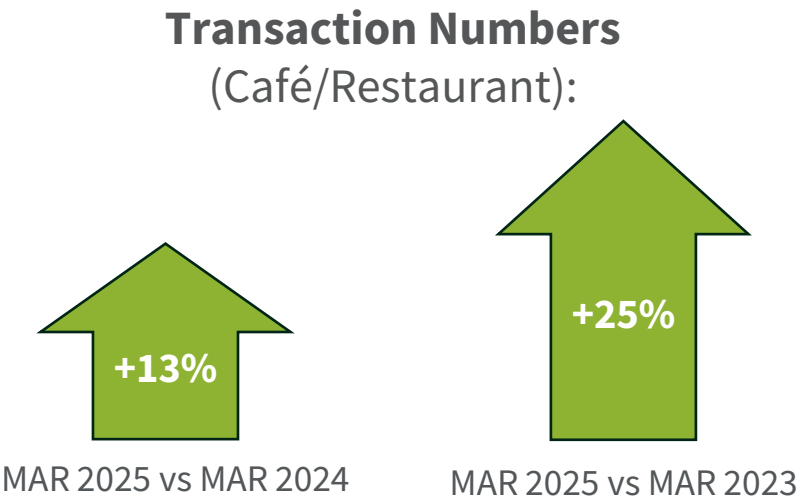
Source: HTA Garden Retail Monitor, British Retail Consortium

Average Transaction Values (ATVs) and Transaction Numbers

In the café/restaurant; March 2025

Garden centre cafes and restaurants benefitted from the good weather in March 2025, with the sun drawing in customers looking to spend on their gardens. Transaction numbers were +13% greater than in March 2024, and +25% from March 2023. January and February 2025 saw the number of transactions remain flat, however March showed that there is still potential for growth in this area.

Meanwhile, ATVs were up +3% from March 2024, rising from £11.81 to £12.15 (excl. VAT). This rise is largely due to increased customer basket sizes, as inflation remains flat across catering categories. Overall, most of the growth in catering sales (up +16%) is attributable to the rise in transactions compared to previous years.



Source: HTA Garden Retail Monitor

Garden Centre Sales

March garden/gardening breakdowns

Compared to March 2024, bedding plants and plant care products were both up +40%, sales of garden features and structures were up +44%, and garden tools were up +39%. All gardening categories were up by at least +23% compared to March 2024, except for indoor plants (up +5%), which as a category will not have been as affected by poor weather in previous years.

Comparisons with March 2023 are even more exceptional, with many gardening categories up at least +65% in 2025. For context, March 2023 was the UK's wettest March over the last 30 years.

As a result of this strong performance in a major trading month for garden centres, all gardening categories are ahead compared to 2024 for the year-to-date.

With the rises in employer's national insurance contributions and minimum wage coming into effect as of April 2025, the growing cost of doing business means that these sorts of sales increase are required for garden centres to alleviate some of the additional cost pressures.

A strong March is a welcome boost for retailers, but a strong April-June period will be key in helping the industry offset rising business costs.

Category	Mar 2025 vs 2024	Mar 2025 v 2024 YTD	Mar 2025 vs 2023
Bedding plants	+40%	+19%	+85%
Hardy plants, shrubs & trees	+26%	+13%	+65%
Indoor plants	+5%	+2%	+11%
Bulbs	+32%	+12%	+47%
Seeds (excl. grass seed)	+27%	+10%	+37%
Plant care products	+40%	+18%	+84%
Garden tools & equipment	+39%	+17%	+67%
Garden features & structures	+44%	+24%	+88%
Outdoor containers	+26%	+11%	+60%
BBQs and Heating	+30%	+21%	+12%
Garden Furniture	+23%	+5%	+10%

Source: HTA Garden Retail Monitor

Garden Centre Sales

March non-garden/gardening breakdowns

Among non-gardening categories, all were up compared to March 2024 and 2023. Although the increase in sales in these categories is much lower than observed in gardening categories, the increases are very positive, particularly given that March 2024 benefited from the trade around Easter weekend.

Catering sales grew much more notably than previous months, up +16% compared to March 2024 and up +35% compared to March 2023, benefitting from the good weather bringing increased footfall to garden centres. January and February saw only single-figure increases, suggesting that growth in garden centre catering was starting to slow. It remains to be seen whether this growth will be sustained across the coming months.

Comparatively, other non-gardening categories did not grow to such an extent. Food and farm shop sales were up +6%, whilst indoor living and gifting were both up +8%. The lower growth across these categories is likely influenced by the lack of Easter in March 2025. Meanwhile, wild bird care and pets were both up +4% by sales value.

Since non-gardening sales were much more resilient throughout the poor weather seen in January and February, all categories finished March ahead for sales year-to-date.

The results of strong year-to-date positions across all categories, across both gardening and non-gardening, can be viewed on page 12.

Category	Mar 2025 vs 2024	Mar 2025 v 2024 YTD	Mar 2025 vs 2023
Indoor living & homewares	+8%	+6%	+11%
Gifting	+8%	+5%	+13%
Wild bird care	+4%	+3%	+21%
Pets	+4%	+5%	+15%
Food & farm shop	+6%	+10%	+25%
Catering	+16%	+14%	+35%

Source: HTA Garden Retail Monitor

Retailer Category Shares

March 2023-2025

In March's Market Update report covering February 2025 performance, we included the share of total monthly sales held by different categories. February saw catering overtake live plants, bulbs, and seeds for the first time, following continued growth.

For March 2025, live plants, bulbs, and seeds comfortably made up the largest share of garden centre turnover (30% of total turnover). Following the exceptional performance of gardening categories, the turnover share of these products increased by 2% compared to March 2024.

Garden care and maintenance also grew its share of monthly turnover by 2%, making up 11% of turnover generated in March 2025. These products mirrored the rise seen in live plants, brought on by the sunny and calm weather in March 2025 that didn't materialise in March 2023 or 2024.

Catering meanwhile saw its share of total turnover fall by 1%, although it remained the category that holds the second largest share of turnover in March. Gifting appears to be on a downward trend in terms of turnover share for March, having declined from 6% of turnover to 4% of turnover between 2022 and 2024, albeit this category is likely influenced by the timing of Easter year-to-year.

Category	Mar 2025	Mar 2024	Mar 2023
Live plants, bulbs, & seeds	30%	28%	27%
Catering	17%	18%	18%
Garden care & maintenance	11%	9%	9%
Other non-garden products	8%	9%	9%
Garden containers & structures	7%	7%	6%
Outdoor living	6%	6%	8%
Homewares & floristry	6%	6%	7%
Food hall & farm shop	5%	5%	5%
Gifting	4%	5%	6%
Wild bird care, pets, & aquatics	3%	3%	3%
Other garden products	2%	2%	2%
Miscellaneous	2%	1%	1%

Source: HTA Garden Retail Monitor

Garden Centre Sales

Calendar year to date; March 2025

Following an exceptionally strong month for garden centres, all sales categories were up for the year-to-end of March, compared to 2024 and 2023. Overall sales including catering were up +12% for the year-to-date compared to 2024, and up +11% for the year-to-date when catering is excluded.

Gardening sales for the year have bounced back following a strong month, with the year-to-date sales ahead by +14% from 2024, and up +22% from 2023. March is a big month for garden centres, so the strong performance this month has largely countered the slow start to 2025 seen in January and February.

Despite a better start to the year, non-gardening year-to-date sales are up to a lesser extent when compared to 2024 – up +11% when including catering and up +8% when excluding catering.

	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>
YTD Mar 2025 vs YTD Mar 2024	+12%	+11%	+14%	+11%	+8%
YTD Mar 2025 vs YTD Mar 2023	+19%	+19%	+22%	+19%	+14%

(Reported changes are in **sales value excluding VAT**)

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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Source: HTA Garden Retail Monitor

National Weather

March 2025 v March 2024

March 2025 was characterized by exceptionally dry and calm conditions, ranking as the third sunniest March in the United Kingdom since official meteorological records began in 1910. The month recorded 158.1 hours of sunshine, representing a significant increase from the 95.2 hours documented in March 2024.





Average temperatures rose modestly compared to the previous year, with the average temperature in March 2025 exceeding that of March 2024 by 0.7°C.

Total rainfall in March 2025 was down by 65% compared to March 2024. Consequently, only 6.3 rain days were observed, a substantial decline from the 17.4 rain days seen in March 2024.

While the favourable weather conditions greatly benefitted garden centre trading in March, the lower precipitation and higher temperatures could cause challenges for growers and retailers if conditions persist across the coming months, and the threat of a hosepipe ban may also impact consumers decisions to purchase plants.

Although groundwater levels generally remain in normal ranges and the current risk of drought is low (see page 14), the possibility of repeatedly dry months could be cause for concern.

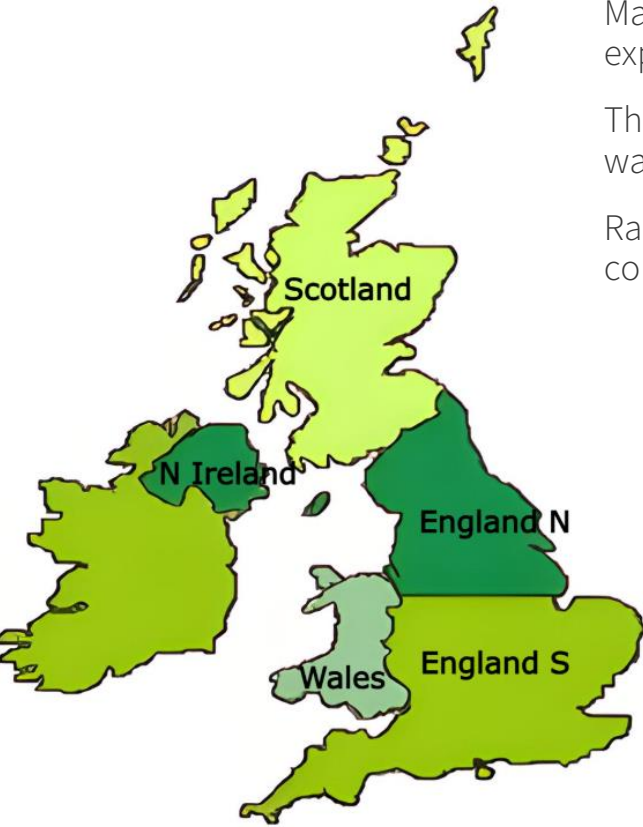
The figures reported are national averages for the UK. To view the figures on a regional basis: [click or tap here](#) to visit the MET Office website and view the year ordered stats by month.

	March 2025	March 2024
 Mean temperature (°C)	7.0	6.3
 Hours of sunshine	158.1	95.2
 Total Rainfall (mm)	36.9	107.8
 No. of rain days (>1mm/day)	6.3	17.4

Source: MET Office

Regional Weather

March 2025



March 2025 was recorded as the sunniest March in England since 1910. While Scotland and Northern Ireland experienced less sunshine, both regions received more sunshine than the national average from 2024.

The distribution of sunshine generally correlated with regional temperatures, except for Northern Ireland, which was warmer than Wales and North England despite fewer sunshine hours.

Rainfall was unevenly distributed across the UK, with Scotland receiving 74% of the month's total rainfall. By contrast, South England experienced notably dry conditions, recording only 8.8mm of rainfall over just 2.4 days.

Region	Mean Temp (°C)	Hours of sunshine	Rainfall (mm)	Rain days (>1mm/day)
Overall	7.0	158.1	107.1	6.3
Scotland	6.1	116.9	79.2	11.5
Northern Ireland	7.5	114.8	27.0	6.9
North England	7.1	166.4	26.0	5.3
South England	7.7	196.1	8.8	2.4
Wales	7.0	168.1	23.9	4.8

Source: MET Office

Current Reservoir Levels

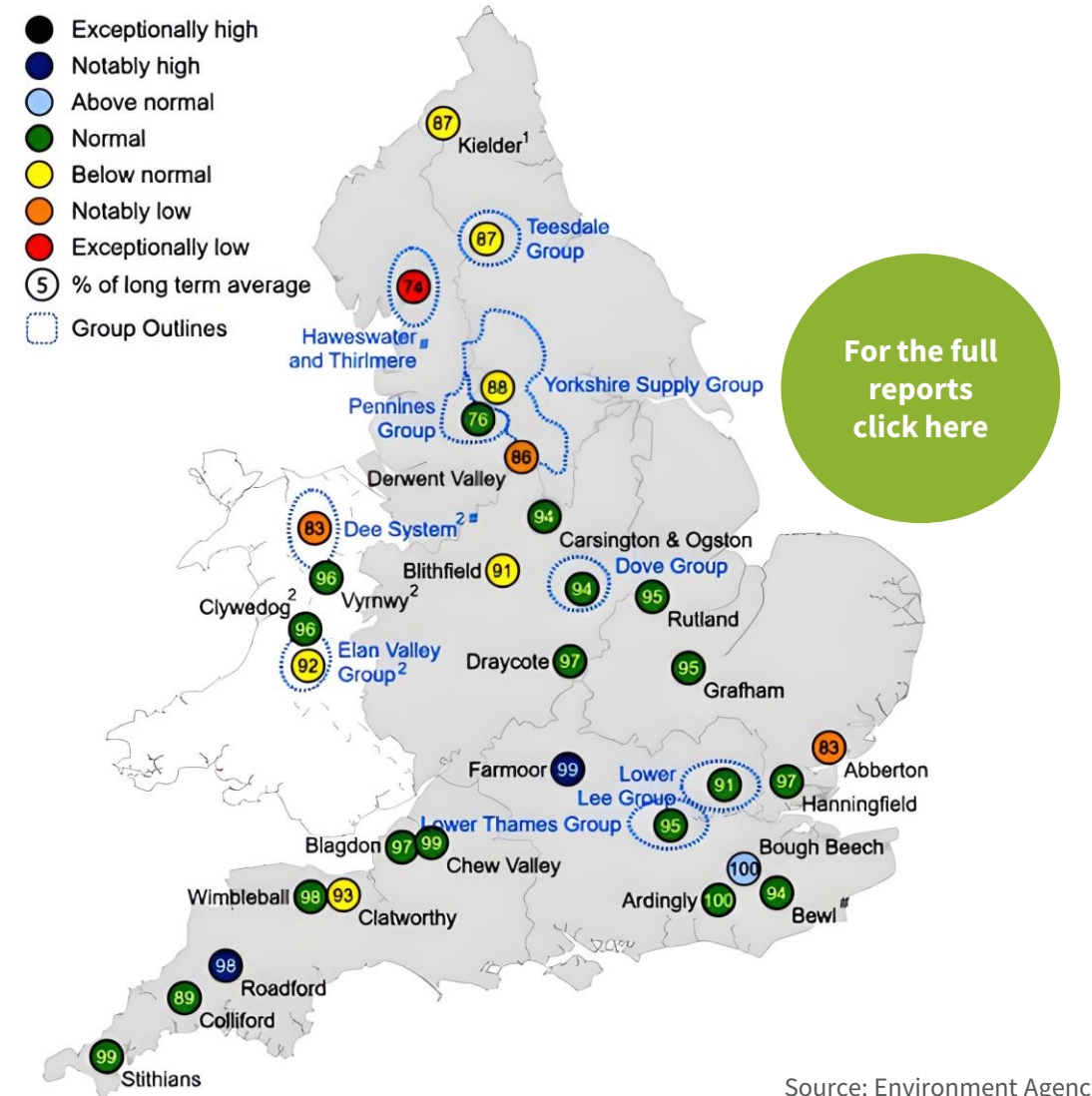
England and Wales; March 2025

Across England and Wales, reservoir levels ranged from notably high to exceptionally low for the time of year.

Given the dry weather throughout March 2025, storage levels were down at the majority of England and Wales' reservoirs compared to February 2025. The largest decrease was in the north-west of England, with the Haweswater and Thirlmere reservoir falling to exceptionally low levels.

18 reservoirs were classed as normal for the time of year, whereas 6 were classed as below normal and 3 were classed as notably low for the time of year.

At the end of March, total storage was reported as being at 89% of total capacity, a decrease of -3% since the end of February.



Source: Environment Agency

Forecast Groundwater Levels

Under median rainfall conditions, groundwater levels are expected to be somewhat mixed across the UK over the next 3 months, following a very dry March 2025.

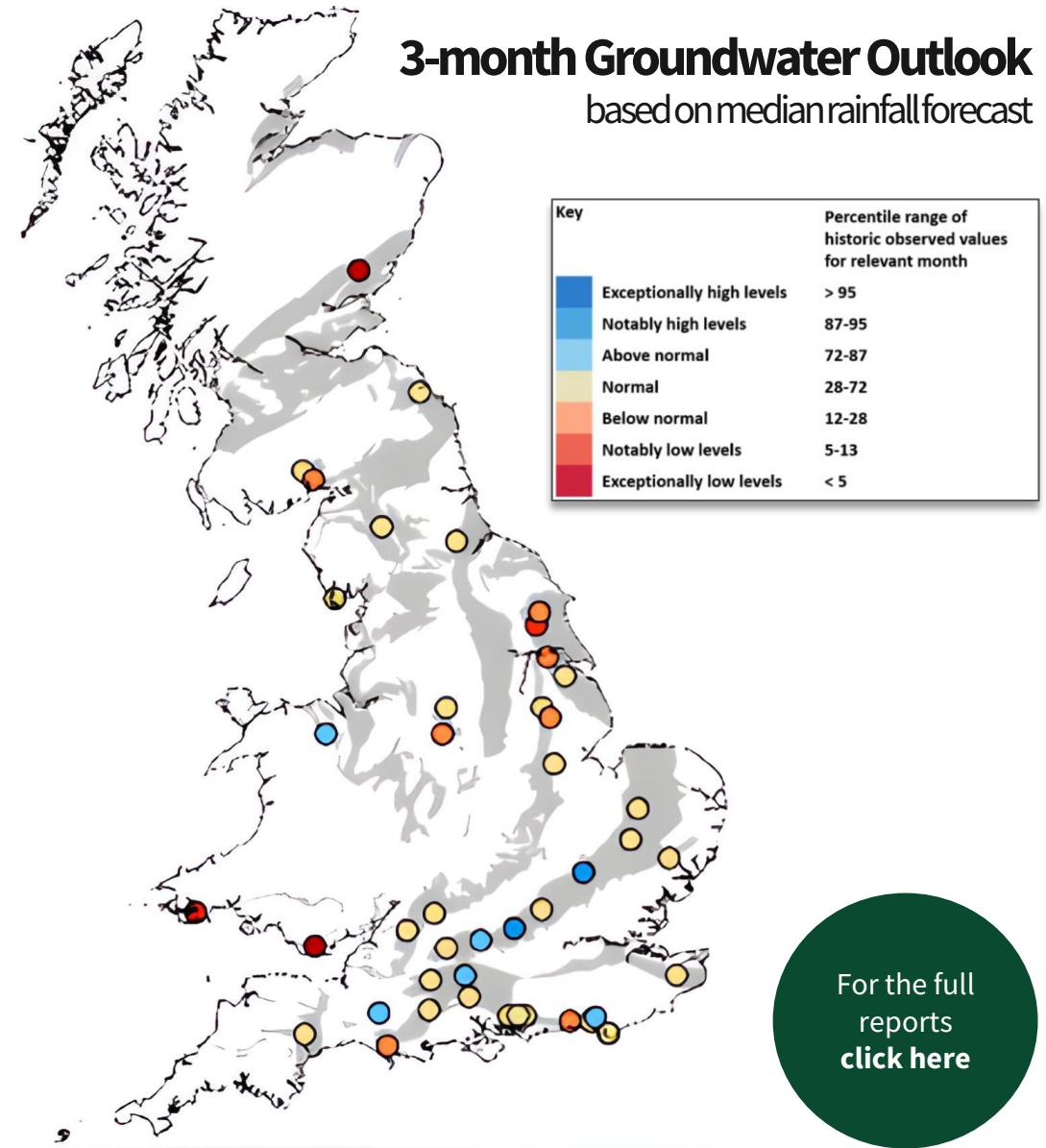
Across Southern England, predicted groundwater levels range from below normal along the south coast, to exceptionally high further inland.

Northern Scotland and the South of Wales are expected to have exceptionally low levels of groundwater relative to previous years, whereas the North-East of England is predicted to have groundwater levels ranging from normal to notably low.

The rest of the UK is expected to experience typical groundwater levels in line with recent years. However, should the dry weather continue into the coming months, the threat of water shortages or hosepipe bans will increase, meaning members should remain conscientious about their water use where possible.

The HTA continues to represent horticulture on the Environment Agency's National Drought Group and will closely monitor the impact of any ongoing dry weather on water resources and threat of water use restrictions. Members can access the HTA's updates, advice and guidance for improving resilience [here](#).

3-month Groundwater Outlook based on median rainfall forecast



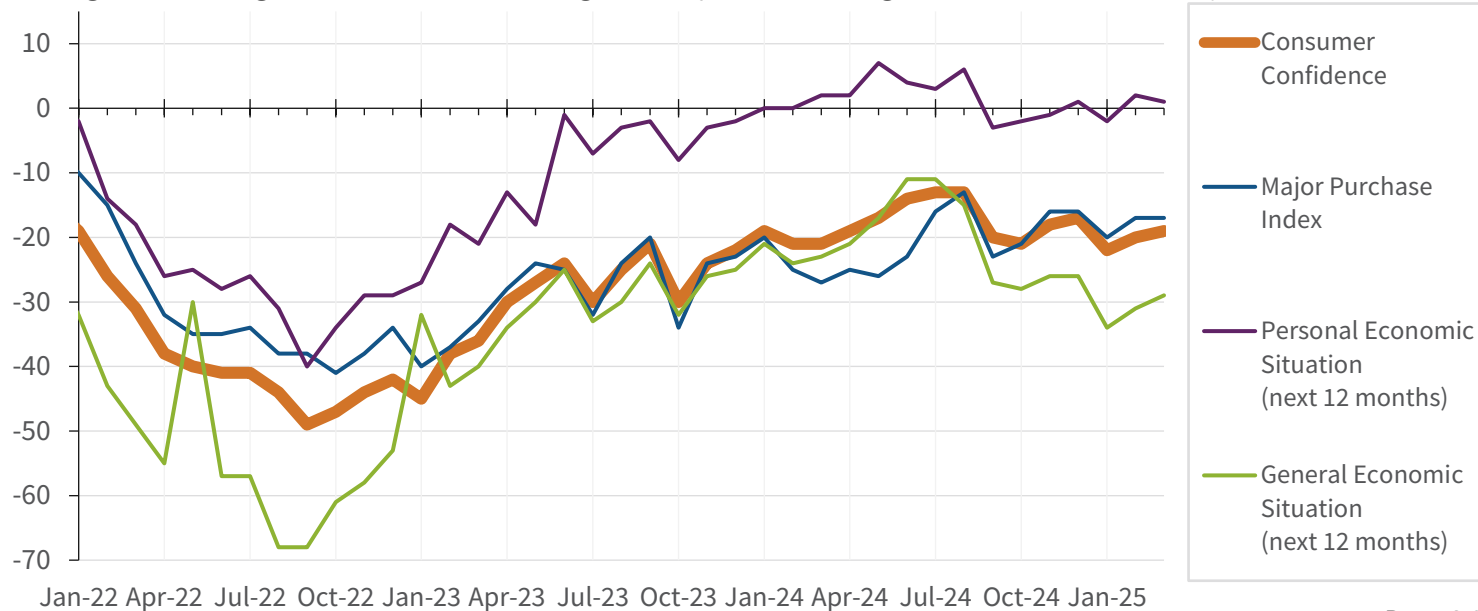
Consumer Confidence

Consumers are asked how the financial position of their household 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 middle three measures in the table make up the overall index score, while 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.**

Overall consumer confidence remained subdued in March, having risen by 1 point. However, overall confidence remained above the levels seen at the height of the 2022 cost-of-living crisis (-49 points). The latest figures are the result of fieldwork up to March 13th and does not reflect any of the recent market volatility driven by the trade war initiated by the USA on April 4th.

Consumer's outlook on their personal economic situation was down by 1 point, whereas their perception of the general economic situation was up by 2 points. Despite this, the relative score for the general economic situation is still low (-29 points). Meanwhile, the Major Purchase Index remained stable at -17 points.

The savings index, determining whether consumers are looking to spend or save, fell by -5 points to 25. However, this score remains historically high, meaning that consumers are generally still looking to save rather than spend.



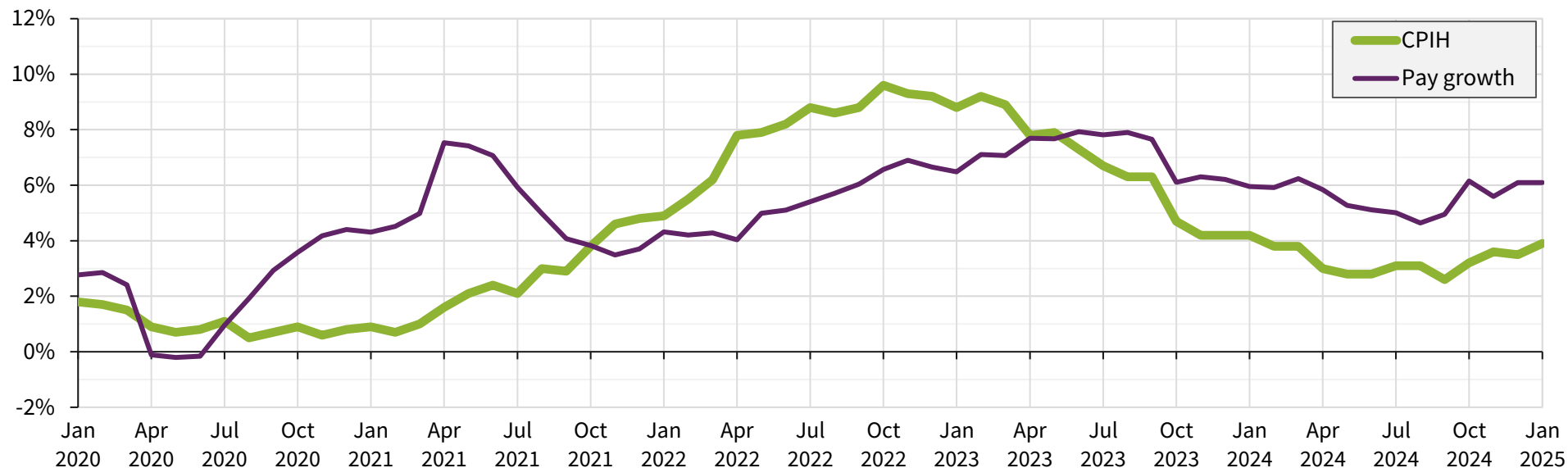
Measure	Relative score (March 2025)	vs Feb 2025
Overall Consumer Confidence Index	-19	+1
Personal financial situation (next 12 months)	1	-1
General economic situation (next 12 months)	-29	+2
Major Purchase Index	-17	0 (=)
<i>Savings Index</i>	25	-5

Base: 2,011 UK Individuals aged 16+, interviewed Feb 28th – Mar 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. In February 2025, the inflation rate was 3.7%, down by -0.2% from January 2025.

Pay growth continues to outpace inflation by a comfortable margin, with average weekly earnings rising 6.1% on average relative to the previous year (as of January 2025). Pay growth has tracked above inflation consistently since May 2023, providing real-terms wage growth for households, but compounding the costs placed on businesses. Meanwhile, the UK unemployment rate remains at 4.4%, stable relative to previous periods.



CPIH
inflation
(Feb 2025)
= **3.7%**

Average Weekly
Earnings: Regular
pay growth
(Jan 2025)
= **6.1%**

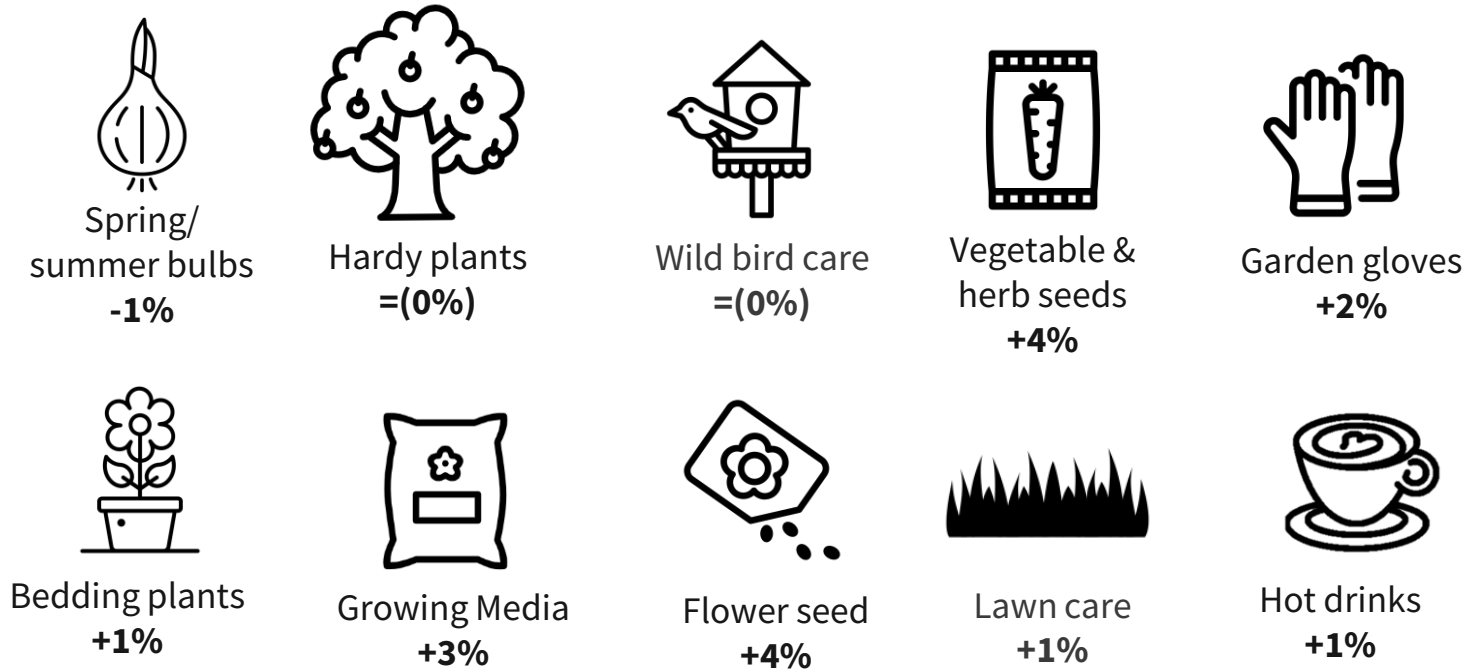
Unemployment
Rate
(Nov-Jan 2025)
= **4.4%**

Sources: gov.uk

Retail inflation on garden products

Our March Trolley

(March 2025 vs March 2024 price inflation)



Our analysis compares the prices of individual items transacted in garden centres between March 2024 and March 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 March 2024 and March 2025, our trolley selection had price inflation generally below the UK CPIH inflation rate. Seeds led the price inflation, with both vegetable & herb seeds and flower seeds showing the highest increase at +4%. Growing media (+3%) and garden gloves (+2%) showed a slight rise in price inflation while lawn care and bedding plants showed a price inflation of +1% each.

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

Spring bulbs showed price deflation (-1%).

In the cafés/restaurants, hot drinks experienced slight price inflation (+1%) likely due to rising ingredient and staffing costs.

Retail inflation on plants

(March 2025 vs March 2024 price inflation)



Flowering Houseplants
=(0%)



Pot Bedding
+8%



Foliage Houseplants
-2%



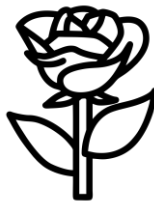
Shrubs
=(0%)



Pack Bedding
+1%



Herbaceous
+4%



Roses
=(0%)



Conifers
+7%



Climbers
+5%



Fruit trees & bushes
=(0%)

Here we look at retail price inflation across various plant categories within the garden centre channel, comparing March 2025 with March 2024. The data reveals significant price variation amongst our basket.

Pot bedding (+8%) and Conifers (+7%) saw significant price increases year-on-year followed by climbers (+5%), and herbaceous (+4%).

Pack bedding (+1%) showed a slight rise in prices.

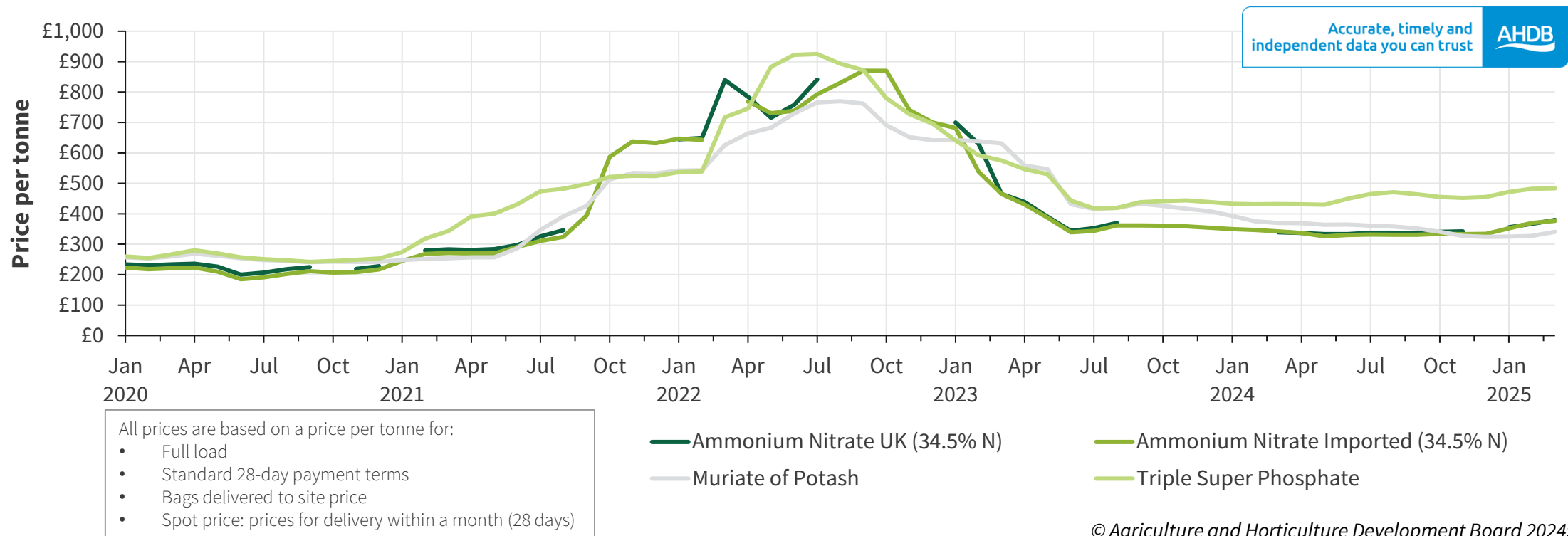
On the other hand, shrubs, roses, fruit trees & bushes, flowering houseplants, and roses maintained their prices on average with March 2024.

Foliage houseplant prices fell slightly (-2%) when compared to March 2024.

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. In summary, overall fertiliser costs have remained largely stable since October 2023, with costs remaining well below the peaks observed in 2022.



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Shipping Container Prices

We report on a composite index which is an aggregate of major shipping costs across various routes.

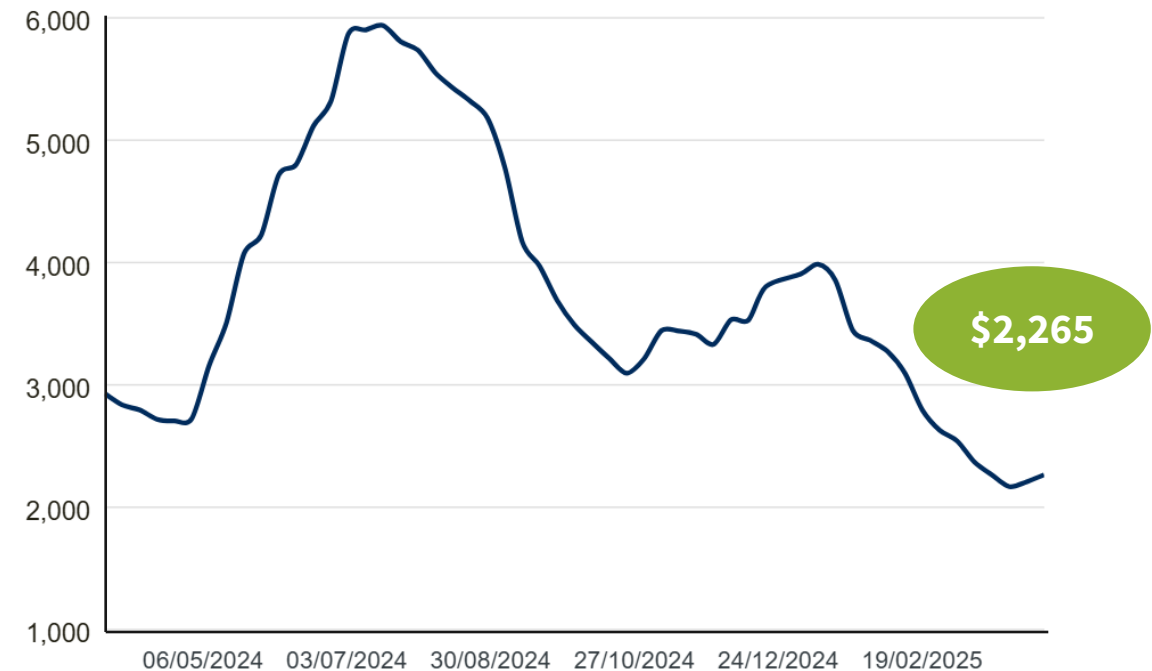
The Drewry's World Container Index (WCI) was at \$2,265 per 40ft container, as of April 10th, 2025. Prices had been on a downward trajectory since the beginning of 2025 but have begun to rise since March 2025

Despite the slight increase since March, container prices are down - 19% compared to April 2024. Container prices also remain well below the peaks seen during the pandemic (\$10,377).

Drewry have stated that they expect rates to increase notably in the coming months, following the tariffs placed on goods by the United States. It remains to be seen what the exact consequences the tariffs will have on global trade and the global economy,

Drewry World Container Index (WCI)

10th April 2025 (US\$/40ft container)



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 at:



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