HTA

Market Update

May 2025

Contents

Overview

- April 2025 was another positive month for garden centres, following an exceptional March. Overall sales rose by +22% compared to April 2024, and +12% compared to April 2023. Consequently, for the year-to-end of April, garden centre sales were +15% ahead of 2024 and 2023 at this point in the year.
- With calm and sunny weather throughout April 2025, gardening categories lead the growth in sales for April 2024, rising by +32% compared to April 2024. The percentage swing is particularly large given the exceptionally wet weather experienced in April 2024, which hit gardening sales hard. Consecutive strong months for gardening and far more favourable spring weather in 2025 has resulted in gardening category sales finishing +22% ahead of the year-to-end of April position in 2024.
- The average transaction value in the garden store rose by +12% compared to April 2024, demonstrating that garden centre customers spent notably more per visit. Meanwhile, transactions in the garden store also rose +12% compared to April 2024.
- Non-gardening categories also continue to show steady year-on-year growth, with April 2025 sales +8% ahead of April 2024 and April 2023. This left non-gardening sales +9% ahead of the year-to-end of April 2025 when compared with 2024. Catering sales also continue to grow steadily, up +6% compared to April 2024 and up +13% compared to April 2023. Garden centre café's saw greater spending both in average transaction values and in the number of transactions made.
- Consumer confidence fell -4 points overall in April 2025, and continues to be fragile in light of various market pressures. With the impact of US tariffs coming into effect over the next month, consumers' financial outlooks are expected to continue to fall in the short-term.
- For garden centres, April 2025 was another great month for trade, particularly for gardening products. The sunny weather continues to provide a welcome boost to garden centre sales at a critical point of the year, despite low consumer confidence; however, the risk of drought and hosepipe bans has begun to form on the horizon.
- **Read on for all the detail…**

Key Points

April 2025

Overall sales including catering were up +22% by value compared to April 2024

Gardening sales value increased by +32% compared to April 2024

Average transaction values were up +12% to £32.26 (exc. VAT) compared to April 2024

April's weather remained warm and dry, increasing the risk of hosepipe bans or drought orders should dry conditions persist

Overall consumer confidence fell -4 points remaining fragile amidst global uncertainty

Garden Centre Sales

April 2025

April 2025 continued the excellent sales performance that was observed in March 2025, with overall garden sales up +22% by value compared to April 2024, and +12% compared to 2023. When excluding catering, overall sales value was up by +26% compared to April 2024, and +13% compared to 2023.

Although Easter Sunday occurring in April 2025 meant that there was one fewer trading day compared to April 2024 (except in Scotland), garden centres benefitted overall from the increased sales generated across Easter weekend and the comparatively better weather. However, the year-to-end of April figures shown on page 13 mitigate the variance caused by Easter, giving a view of the year so far.

Similar to the previous month, most of the growth seen in April 2025 was driven by sales of garden/gardening products, with the value of sales in these categories rising by +32% compared to April 2024, and up +15% compared to April 2023. The continued calm and sunny weather remained a key driver in sales for this category, encouraging many consumers to continue investing in their outdoor spaces.

Non-gardening sales also grew steadily by value, rising +8% compared to April 2024 and April 2023 respectively. When excluding catering sales, monthly non-gardening sales value was up +9% compared to April 2024, but up only +5% compared to 2023.

	Overall *Incl. catering*	**Overall** *excl. catering*	**Garden/ Gardening**	**Non-garden /gardening** *Incl. catering*	**Non-garden /gardening** *Excl. catering*
Apr 2025 vs Apr 2024	+22%	+26%	+32%	+8%	+9%
Apr 2025 vs Apr 2023	+12%	+13%	+15%	+8%	+5%

(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

April 2025

As was the case in March 2025, movements in sales volume broadly followed the changes in sales value. This suggests that most of sales value increases can be explained by an increase in sales volume.

Overall sales by volume including catering were up +17% compared to April 2024, and up +12% compared to April 2023. When catering was excluded, sales volumes were up +22% compared to 2024, but only up +8% compared to 2023.

Gardening categories again drove most of the increase, with April 2025 sales volumes of gardening categories rising +27% compared to April 2024 and +11% compared to April 2023. This strong performance remains as significant as last month, since April is one of the biggest months for gardening sales in the context of the full year.

Non-gardening sales volumes also rose in April 2025 when catering was included, up +10% compared to April 2024 and +8% compared to April 2023. When catering was excluded, non-gardening volumes were up +11% compared to April 2024, but flat on April 2023. This suggests that the sales increases in non-gardening categories excluding catering since April 2023 is largely a product of price inflation.

	Apr 2025 vs Apr 2024		Apr 2025 vs Apr 2023	
	Sales Value *(£, Exc. VAT)*	**Sales Volume** *(n)*	**Sales Value** *(£, Exc. VAT)*	**Sales Volume** *(n)*
Overall *Incl. catering*	+22%	+17%	+12%	+7%
Overall *Excl. catering*	+26%	+22%	+13%	+8%
Garden/ gardening	+32%	+27%	+15%	+11%
Non-garden/ gardening *Incl. catering*	+8%	+10%	+8%	+8%
Non-garden/ gardening *Excl. catering*	+9%	+11%	+5%	0% (=)

Sources: HTA Garden Retail Monitor

Average Transaction Values (ATVs) and Transaction Numbers

In the garden store; April 2025

In April 2025, transaction numbers were up +12% compared to April 2024, and up +6% compared to April 2023. This highlights that although footfall was notably higher than in previous Aprils, this does not fully account for the +22% increase in sales value compared to April 2024 (excluding catering), meaning consumers were spending more per transaction when visiting garden centres.

The average transaction value excluding VAT was £32.26 in April 2025. This marked a +12% increase compared to April 2024 (£28.86). However, the rise in ATVs may be attributable particularly to the performance of high-value categories: BBQ and heating sales values rose +70% compared to April 2024, whilst garden furniture sales values increased by +27% (see page 9). However, overall sales value (+26%) and sales volume (+22%) rose more than the number of transactions, indicating that April 2025 saw larger customer basket sizes than previous years.

Transaction Numbers
(Garden Store):

+12%
APR 2025 vs APR 2024

+6%
APR 2025 vs APR 2023

Average Transaction Values (ATVs)
(Garden Store):

Excl. VAT
£ 32.26

Incl. VAT
£ 37.87

APR 2025

vs Apr 2024 *(Excl. VAT)*	vs Apr 2023 *(Excl. VAT)*
+12% (£28.86)	**+7%** (£30.27)

Source: HTA Garden Retail Monitor

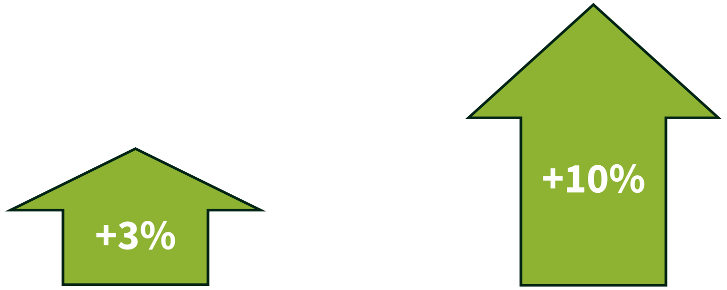
Average Transaction Values (ATVs) and Transaction Numbers

In the café/restaurant; April 2025

Transaction numbers and average transaction values also rose in garden centre cafes, albeit to a lesser extent. Transaction numbers were up +3% in April 2025 compared to April 2024, and up +10% when compared with 2023. The rise in café transactions is much lower than observed last month, suggesting that although the weather may have brought increased footfall to garden centres. However, cafes were only slightly benefitted by the weather as catering sales rose by +6% compared to April 2024, having been outpaced by most other categories.

Compared to April 2024 and 2023, the average transaction value in garden centre cafes was up by +3% in April 2025 (£12.18). This rise was primarily driven by slightly larger customer basket sizes, with inflation in the catering category averaging at about +1%.

Transaction Numbers
(Café/Restaurant):



APR 2025 vs APR 2024

APR 2025 vs APR 2023

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

Excl. VAT
£ **12.18**

Incl. VAT
£ **14.61**

APR 2025

vs Apr 2024 *(Excl. VAT)*	vs Apr 2023 *(Excl. VAT)*
+3% (£11.80)	+3% (£11.81)

Source: HTA Garden Retail Monitor

Garden Centre Sales

April garden/gardening breakdowns

In April 2025, all garden products showed sales growth from April 2024, although the overall picture was more mixed when comparing with April 2023. April is a big month for gardening and sales are heavily influenced by the weather, hence the large variation between years.

The greatest sales increases were seen among BBQs and heating, which rose +70% compared to April 2024, and bedding plants, which were up +47% from April 2024. Garden features and structures also grew notably, up +38% from April 2024 and +37% from April 2023.

Most gardening categories had a sales value increase of around 20-30% when compared to April 2024. Hardy plants, shrubs, and trees (+26%), plant care products (+28%), garden tools (+32%), outdoor containers (+24%) and garden furniture (+27%) all displayed similar levels of sales growth. Sales across these categories are typically sensitive to the weather conditions of the month, highlighting the effect of April 2025's sunny weather.

Meanwhile, other gardening categories exhibited more limited growth. Indoor plants were up +3% compared to April 2024, while bulbs and seeds were up +8% and +7% respectively. However, each of these categories were down on their April 2023 sales, particularly bulbs which were down -22% - although bulb sales in April 2023 were particularly strong.

Following a strong April and March 2025, all gardening categories continue to remain ahead for the year-to-end of April compared to 2024, with many categories more than +10% ahead of their position last year.

Category	Apr 2025 vs 2024	Apr 2025 v 2024 YTD	Apr 2025 vs 2023
Bedding plants	+47%	+33%	+27%
Hardy plants, shrubs & trees	+26%	+19%	0% (=)
Indoor plants	+3%	+1%	-11%
Bulbs	+8%	+10%	-22%
Seeds (excl. grass seed)	+7%	+9%	-2%
Plant care products	+28%	+22%	+20%
Garden tools & equipment	+32%	+22%	+22%
Garden features & structures	+38%	+31%	+37%
Outdoor containers	+24%	+16%	+12%
BBQs and Heating	+70%	+41%	+29%
Garden Furniture	+27%	+16%	+15%

Source: HTA Garden Retail Monitor

Garden Centre Sales

April non-garden/gardening breakdowns

Among non-gardening categories, sales compared to previous April's were more mixed.

Food and farm shop led the way in April 2025, ahead of April 2024's sales by +21%, and ahead of April 2023 by +12%. Seasonal occasions, such as Easter, often positively impact food and farm shop sales. Considering that most of 2024's Easter weekend fell in March, whereas 2025's Easter was in April, this somewhat explains the rise in food and farm shop sales. Similarly, gifting was up +12% compared to April 2024, again a beneficiary of Easter trade.

Catering sales grew by +6% compared to April 2024 and by +13% compared to April 2023. Catering's growth continues to be steady, although most months in 2025 have only seen growth in the single figure. Other non-gardening categories showed similar levels of sales growth: indoor living was up +8% compared to April 2024, whereas pets were up +5%.

The only non-gardening category with sales behind April 2024 and April 2023 levels was wild bird care, which was down -9% from April 2024 and -8% from April 2023. However, for the year-to-end of April, the category is level with 2024, suggesting that consumers may have purchased more of their bird care supplies earlier in the year.

Aside from wild bird care, all other non-gardening categories remain ahead for the year-to-end of April 2025 compared to April 2024. Non-gardening sales have remained strong since January, compounding the strong sales seen in the gardening area in the last couple of months.

Category	Apr 2025 vs 2024	Apr 2025 v 2024 YTD	Apr 2025 vs 2023
Indoor living & homewares	+8%	+9%	-3%
Gifting	+12%	+6%	+4%
Wild bird care	-9%	0% (=)	-8%
Pets	+5%	+3%	-2%
Food & farm shop	+21%	+12%	+12%
Catering	+6%	+11%	+13%

Source: HTA Garden Retail Monitor

Retailer Category Shares

April 2023-2025

Since March 2025's Market Update report, we've included the share of total monthly sales held by different product categories.

In April 2025, live plants, bulbs, and seeds held the largest share of the month's garden centre turnover at 37% of total sales. Although gardening products performed strongly in April 2025, this is broadly to the share of monthly turnover that the category held in April 2023.

Garden care and maintenance was the second largest category in April 2025, making up 13% of total turnover, whilst catering was the third largest category at 11% of total monthly turnover. Given the strong gardening performance seen in April 2025, it's no surprise that garden care and maintenance overtook the share held by catering, although these are broadly level for April over the last three years.

Other categories largely held the same share of monthly turnover as observed in previous Aprils, suggesting that there are limited changes in consumer purchasing behaviour when considering categories at their broadest.

Category	Apr 2025	Apr 2024	Apr 2023
Live plants, bulbs, & seeds	37%	34%	37%
Garden care & maintenance	13%	12%	12%
Catering	11%	13%	11%
Outdoor living	9%	8%	9%
Garden containers & structures	8%	8%	8%
Other non-garden products	6%	7%	6%
Homewares & floristry	4%	5%	5%
Food hall & farm shop	4%	4%	4%
Gifting	3%	3%	3%
Wild bird care, pets, & aquatics	3%	3%	3%
Other garden products	2%	2%	2%
Miscellaneous	0%	0%	0%

Source: HTA Garden Retail Monitor

Garden Centre Sales

Calendar year to date; April 2025

With two strong consecutive months of sales, the year-to-end of April sales positions of garden centres were further solidified in April. The year-to-date figures also remove the sales impact of Easter timing, providing a more long-term view of performance. Overall sales including catering were up +15% for the year-to-date compared to 2024 and 2023, and up +17% and +15% respectively when excluding catering.

Gardening sales remain even further ahead for the year-to-date, with sales ahead by +21% compared to 2024 and +18% compared to 2023. The exceptional sales of these products throughout March and April made a substantial contribution to this measure. Given that these months are some of the biggest for garden centres, these leads on the year-to-date sales are welcomed and necessary with businesses facing huge cost increases and pressure on profits.

Non-gardening sales also remain well ahead of previous years. Compared to the year-to-end of April 2024, non-gardening sales were up +9% when including catering, and up +8% when excluding catering.

	Overall *Incl. catering*	**Overall** *excl. catering*	**Garden/ Gardening**	**Non-garden /gardening** *Incl. catering*	**Non-garden /gardening** *Excl. catering*
YTD Apr 2025 vs YTD Apr 2024	+15%	+17%	+21%	+9%	+8%
YTD Apr 2025 vs YTD Apr 2023	+15%	+15%	+18%	+14%	+9%

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

How are these figures calculated?

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Source: HTA Garden Retail Monitor

National Weather

April 2025 v April 2024

Mirroring March 2025, April also saw warm sunny weather across the UK, leading to increased footfall and sales in garden centres. April 2025 was the third-hottest April since records began in 1910 (both by maximum and average temperature) and was also the sunniest April on record.

Compared to April 2024, April 2025's average temperature was +1°C warmer at 9.3 °C (average including overnight temperatures). April 2025 had more than double the hours of sunshine seen in April 2024, and less than 40% of April 2024's total rainfall.

Consequently, only 5.9 rain days were observed across the UK in April 2025, down from the 16.0 days observed in April 2024. However, it is worth noting that April 2024 was one of the wettest April's on record.

The favourable weather conditions have continued to greatly benefit garden centre trading in April. However, continued low precipitation and rising temperatures are increasing the risk of hosepipe bans or drought orders in the coming Summer.

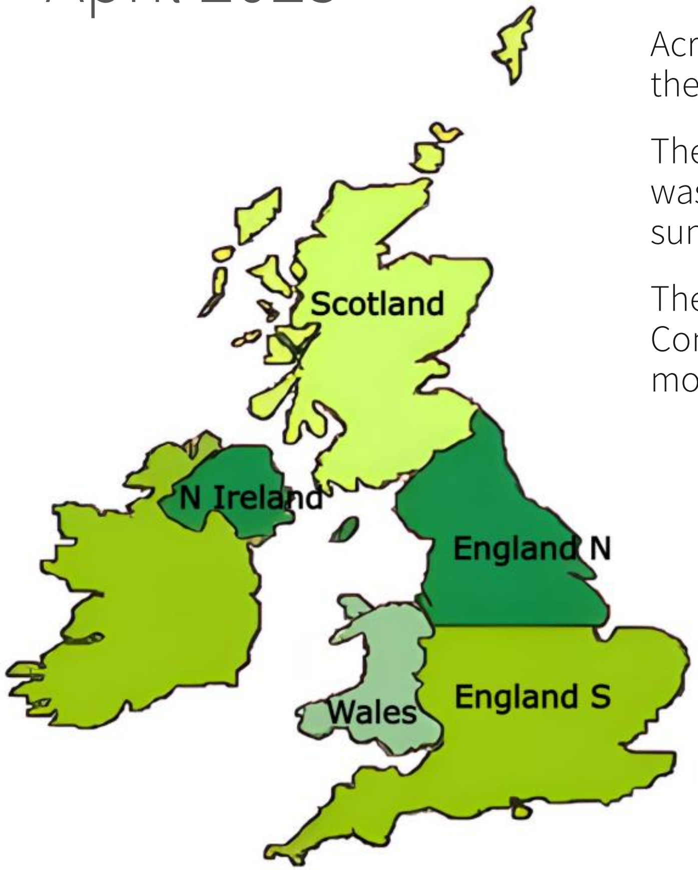
The figures reported are national averages for the UK. To view the figures on a regional basis: **click or tap here** to visit the MET Office website and view the year ordered stats by month.

	April 2025	April 2024
Mean temperature (°C)	9.3	8.3
Hours of sunshine	228.9	112.9
Total Rainfall (mm)	40.4	111.4
No. of rain days (>1mm/day)	5.9	16.0

Source: MET Office

Regional Weather

April 2025



Across the UK, Scotland typically saw below-average temperatures (8.3°C), whereas the rest of the UK fell above the average of 9.3°C.

The South of England saw the most hours of sunshine at 251.2, well above the average of 228.9 hours. Scotland was the least sunny area, but still received 206.5 hours of sunshine – well above April 2024's UK average hours of sunshine (112.9).

The North of England saw the least rainfall in April 2025, with only 15.2mm falling over the course of the month. Conversely, Northern Ireland was the wettest region of the UK in April 2025, with 84.4mm of rainfall across the month converting to 11.5 total rain days.

Region	Mean Temp (°C)	Hours of sunshine	Rainfall (mm)	Rain days (>1mm/day)
Overall	**9.3**	**228.9**	**40.4**	**5.9**
Scotland	8.3	206.5	44.8	7.0
Northern Ireland	9.8	215.7	84.4	11.5
North England	9.6	232.6	15.2	3.9
South England	10.6	251.2	35.2	4.4
Wales	10.0	222.1	70.3	8.3

Source: MET Office

Water Update

April 2025

2025 has seen the driest start to spring since 1961. For the year so far, the UK has received around half the typical amount of rainfall it usually receives. Whilst the dry weather has been beneficial for garden centre sales, the prolonged lack of rainfall brings with it increased risk of drought orders and hosepipe bans.

The Environment Agency has stated that the risk of drought in the UK is currently medium. Currently, the north-east and north-west of England are at the highest risk of drought: these regions are currently experiencing their driest start to the year since 1929. Utilities companies in north-west England are already urging customers to consume less water in light of low reservoir levels, although no drought orders have been issued.

In terms of current reservoir storage, water levels are currently at 84% of capacity in April 2024. In 2022, a year which saw hosepipe bans introduced in some UK regions, stores were at 90% capacity at this point in the year, suggesting that the UK is currently on course to experience some level of drought. River flows are also below normal or lower throughout northern and central England.

The HTA continues to monitor the risks to members that are caused by low rainfall, and members are encouraged to use water responsibly and prepare for all scenarios. Members can access HTA's advice, resources and guidance for improving water resilience here.

Click/tap here
to view the latest
"Drought and Water Availability"
update from the
Environment Agency's National
Drought Group

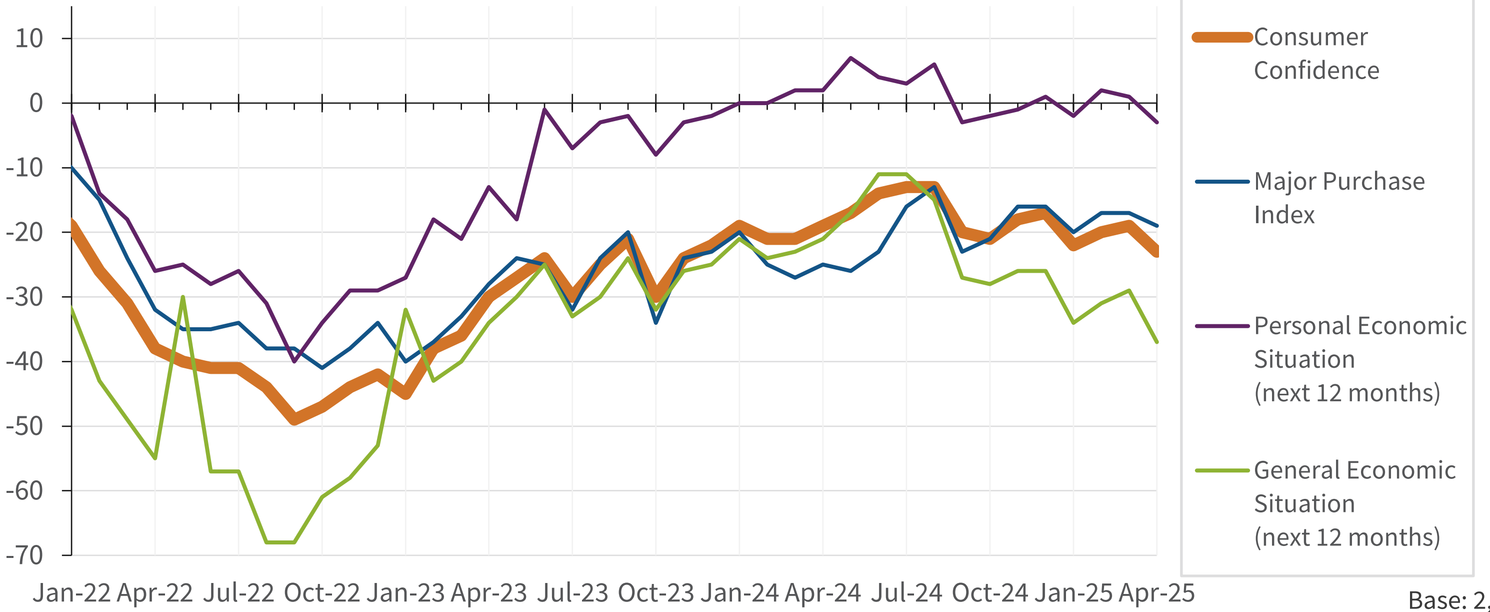
Source: Environment Agency

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.**

Consumer confidence has remained low but stable in recent months, however April 2025 saw a notable drop across all contributing measures, leading to a fall of 4 points in the overall index to -23. The largest drop was in perceptions of the general economy situation over the next 12 months, falling 8 points to -37. Driving these falls are a multitude of factors: the Autumn Budget changes increased business costs such as employer's NI and minimum wage, whilst global uncertainty regarding American tariffs also contributed partially to declines in confidence, although the consequences of these remain uncertain since they were unveiled on April 2nd, 2025.

Consumers' outlook on their personal financial situation also fell by -4 points to -3 overall. Domestically, consumers have been hit with greater living costs, with rises to utilities and council tax coming into effect at the start of April. The major purchase index also fell by -2 points to -19, indicating consumers were less likely to be making large purchases at this time. As the impacts of US tariffs become realised over the coming months, consumers' confidence is expected remain cautious and fragile.



Measure	Relative score (April 2025)	vs Mar 2025
Overall Consumer Confidence Index	**-23**	**-4**
Personal financial situation (next 12 months)	-3	-4
General economic situation (next 12 months)	-37	-8
Major Purchase Index	-19	-2
Savings Index	*30*	+5

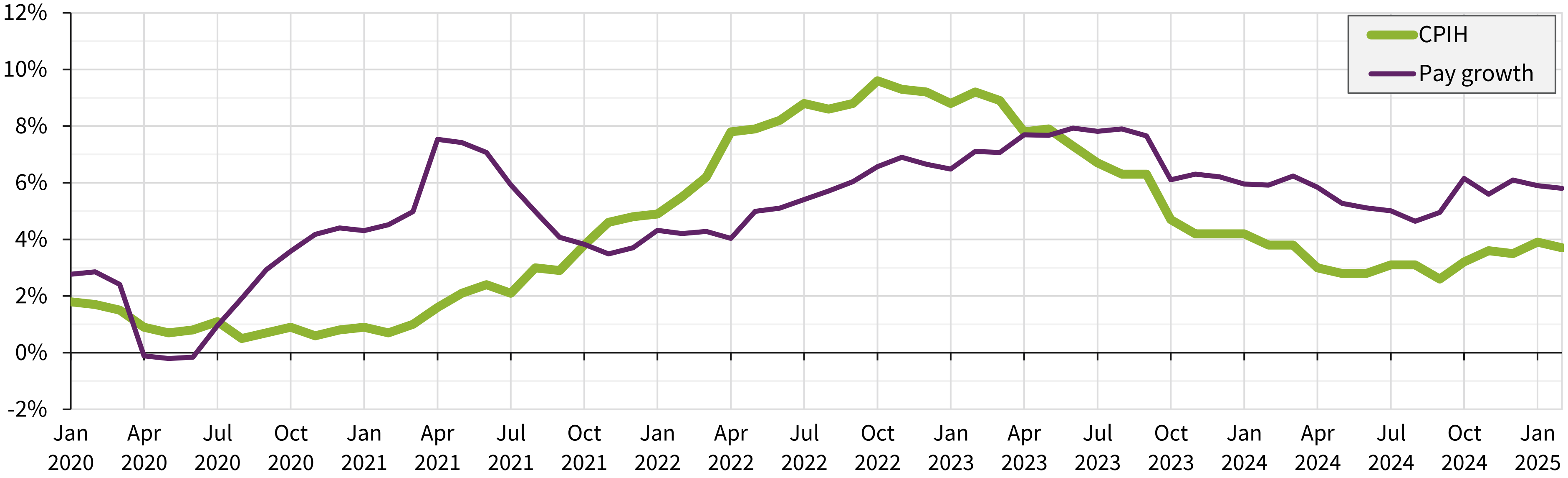
Base: 2,011 UK Individuals aged 16+, interviewed Apr 1st – Apr 14th 2025; Source: NIQ & GfK

Inflation and Wages

Each month, we report the latest official Consumer Prices Index including owner occupiers' housing costs (CPIH) inflation rate. In February 2025, the inflation rate was 3.4%, down by -0.3% from February 2025 and down -0.5% from January 2025.

Pay growth has outpaced the rate of inflation by a comfortable margin since May 2023. Average weekly earnings rose +5.8% on average, relative to the previous year (as of February 2025). As pay growth continues to track above inflation, households continue to benefit from real-terms wage growth. This continues to be welcomed during the cost-of-living crisis, although these wage rises place a growing burden on businesses.

Meanwhile, the UK unemployment rate holds steady at 4.4%, stable relative to previous periods.



CPIH inflation (Mar 2025) **= 3.4%**

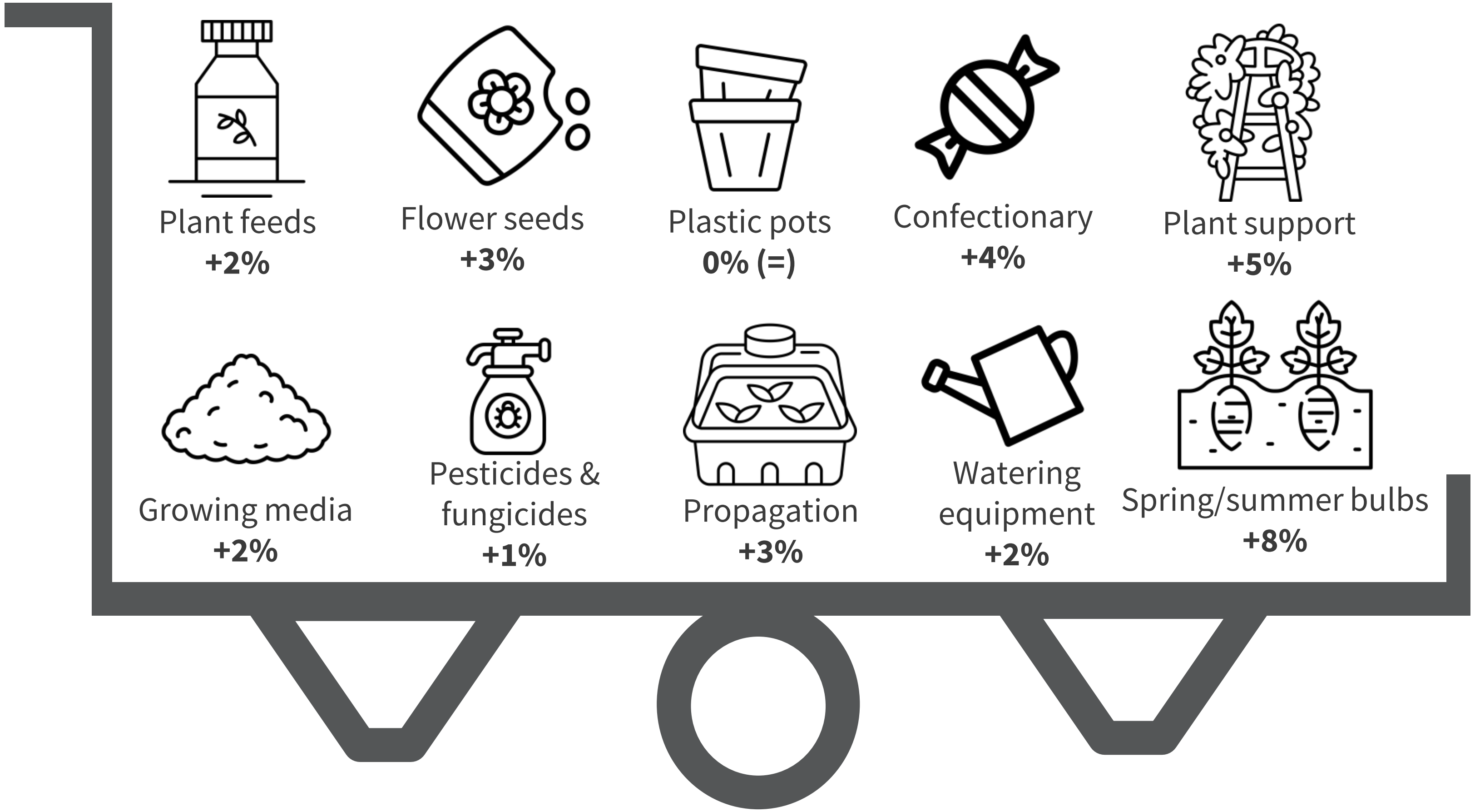
Average Weekly Earnings: Regular pay growth (Feb 2025) **= 5.8%**

Unemployment Rate (Dec-Feb 2025) **= 4.4%**

Source: ONS

Retail Inflation

April 2025 v April 2024 price inflation



Our analysis compares the prices of individual items purchased in garden centres between April 2025 and April 2024. 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.

April's seasonal trolley contains items that broadly indicate inflation in-line with the CPIH rate. Prices of propagation, flower seeds, and confectionary all rose by 3-4% compared to April 2024.

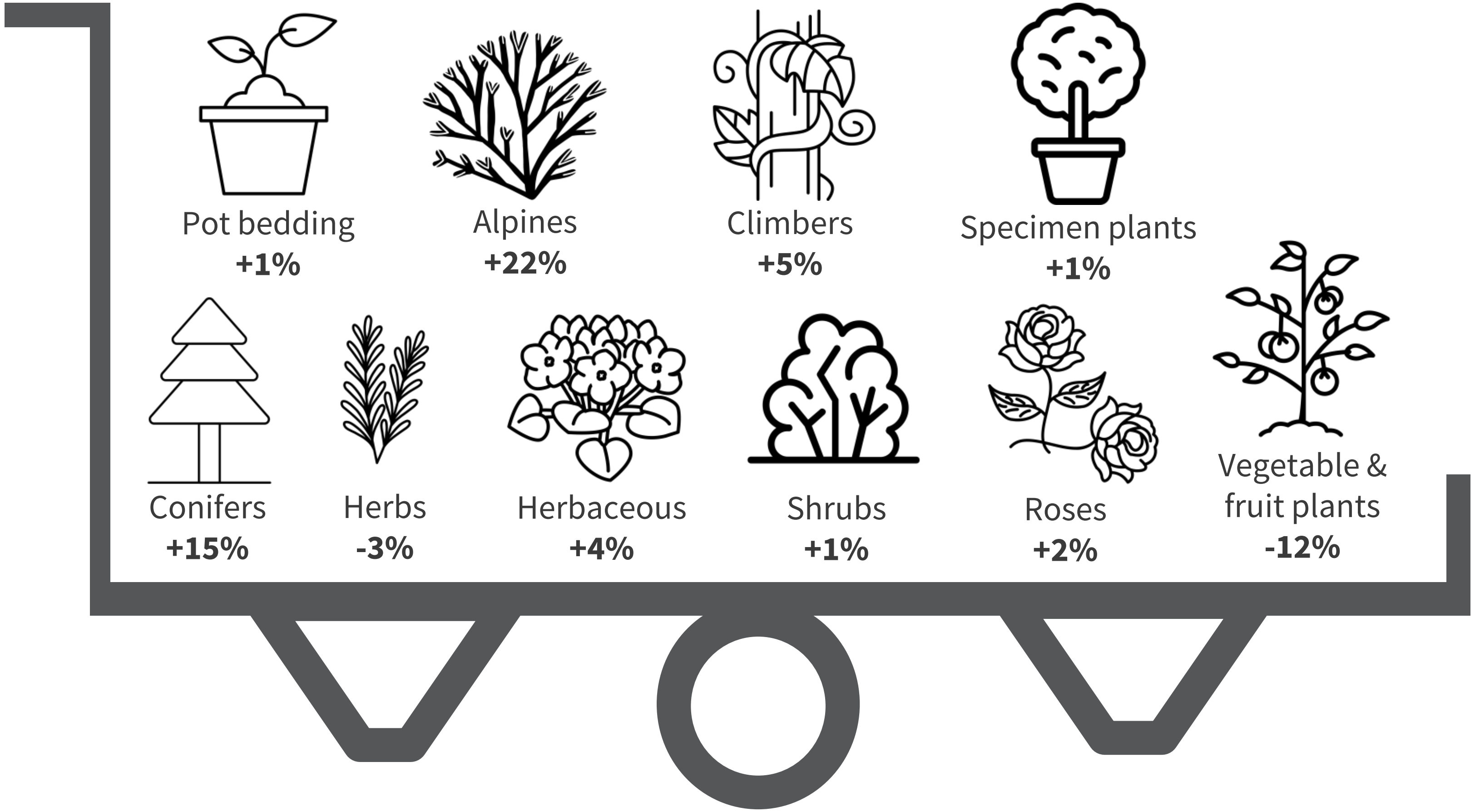
Some items showed below-average levels of inflation: plant feed, growing media, and watering equipment prices were inflated by +2%, whilst prices of pesticides and fungicides were up +1% on average compared to 2024. Meanwhile, plastic pots appeared to exhibit no inflation.

Other items were subject to above-average inflation. For example, plant support prices were up +5% compared to April 2024, whereas the price of spring/summer bulbs were up substantially, inflating by +8% compared to April 2024.

Source: HTA Garden Retail Monitor

Retail Inflation on Plants

April 2025 v April 2024 price inflation



We also look at retail price inflation across various plant categories within garden centres, comparing April 2025 to April 2024. The data reveals significant variation in prices among different plant categories.

Some plants had price-rises largely in-line with CPIH rates. Herbaceous plant prices rose by +4%, whereas climber prices rose by +5%. Meanwhile, pot bedding and shrub prices were up by +1% and rose prices were up +2%.

However, some categories exhibited notable price inflation. Conifer prices were up +15% compared to April 2024, whereas prices of alpines were up +22%.

Other plant categories exhibited notable deflation in their prices. Herbs were -3% less expensive in April 2025 compared to 2024, and fruit-and-vegetable plants saw their prices fall by -12%. However, these falls may be a result of customers taking up multi-buy offers for these items, lowering the average unit price.

Source: HTA Garden Retail Monitor

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Shipping Container Prices

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

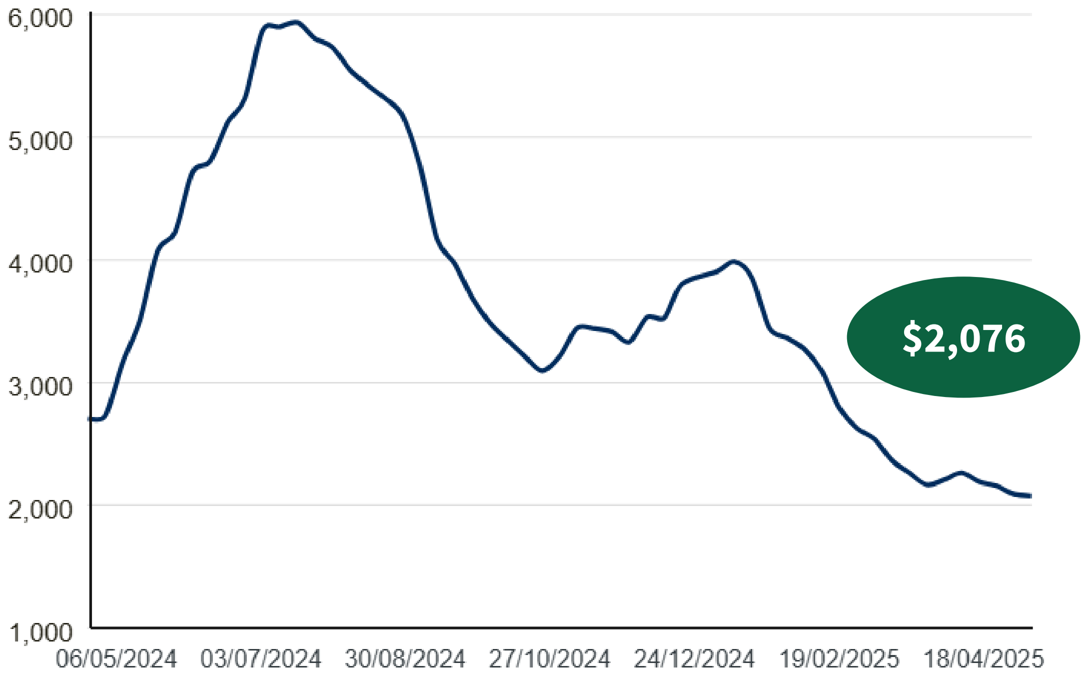
The Drewry's World Container Index (WCI) was at $2,076 per 40ft container, as of May 8th, 2025. Container prices had risen slightly throughout March, although have resumed the downward trend seen since the start of 2025.

Compared to this time last year, container prices are down by 34% (down from $3,159). This remains well below the peaks seen during the pandemic ($10,377), although substantially above the pre-pandemic average ($1,420)

Drewry have stated that they expect the regional rates to be less volatile in the coming weeks, as carriers finalise reorganising their capacity as the effects of global tariffs start to be realised.

Drewry World Container Index (WCI)

8th May 2025 (US$/40ft container)



Source: Drewry Supply Chain Advisors

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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