HTA

Market Update

June 2025

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Overview

- May 2025 saw a continuation of the strong sales growth in garden centres, albeit at a slower rate than March and April. Overall sales were up +4% compared to May 2024, which was the UK's hottest May on record, and up +2% compared to May 2023 which featured an additional Bank Holiday for the King's Coronation prompting gardeners to spend additional time and money on their outdoor space.
- In 2023 and 2024, poor weather throughout early Spring meant that demand and footfall in garden centres was dampened until May, so outperforming these years of pent-up demand is a big positive for garden centres. May is also typically the biggest month in the garden retail calendar year, and so small percentage increases are more significant.
- Following the prolonged good weather, gardening sales showed signs of slowing down. May 2025's garden/gardening sales were up +5% compared to 2024 but were down -3% compared to May 2023.
- The fall in gardening sales was also limited to specific categories which typically sell earlier in the Spring, such as seeds and bulbs. Gardening categories that were down on May 2024 and 2023 remain well ahead of their total sales for the year-to-end of May, suggesting demand for these products had already been met earlier in the year.
- Non-gardening sales continued to show steady growth, up +5% compared to May 2024 and +15% compared to May 2023. When catering was excluded, non-gardening sales by value were still up +4% and +10% respectively.
- Consumer confidence remains stable yet fragile, despite showing a slight recovery of +3 points on the overall index. Disruption to global supply chains remains volatile, with the prices of shipping containers having risen by +70% in the past month.
- Although May 2025's sales increases may not be as eye-catching as previous months, the month caps off the end of a fantastic Spring for garden centres. Garden centre sales for the year-to-end of May 2025 remain ahead of previous years by +12%, underlining the exceptional garden centre trading throughout Spring 2025. Following the increasing cost of doing business, the good weather has come at the perfect time for garden centres, and these levels of increases and more will be essential to go towards covering these costs.
- A strong June would be the perfect end to one of the best Spring trading periods in recent years.

Read on for all the detail…

Key Points

May 2025

Overall sales including catering were up +4% by value compared to May 2024

May topped off the **warmest Spring on record**

Overall consumer confidence recovered by 3 points, but remains very cautious in historic terms

Gardening sales by value were up +5% compared to May 2024

Catering sales by value were up +8% compared to May 2024

Garden Centre Sales

May 2025

May 2025 was a solid month for garden centre trade. Overall sales were up +4% by value compared to May 2024, and up +2% by value compared to 2023.

Although a smaller increase in percentage terms, May is typically the largest trading month for garden centres. Therefore, the absolute increase in total sales value is larger than it may initially appear.

Meanwhile, overall garden centre sales excluding catering were up +5% compared to May 2024, but down -1% compared to May 2023. The weaker performance relative to 2023 is likely down to sales of gardening products, which were down -3% compared to May 2023. May 2023 featured an additional Bank Holiday for the King's Coronation, and March-April 2023 was particularly poor weather-wise, potentially contributing to pent-up demand. However, gardening sales were still up +5% relative to May 2024, which was the warmest May on record to date.

Non-gardening sales continued to outperform previous years up +5% compared to May 2024 when including catering, and up 4% excluding catering.

	Overall *Incl. catering*	**Overall** *excl. catering*	**Garden/ Gardening**	**Non-garden /gardening** *Incl. catering*	**Non-garden /gardening** *Excl. catering*
May 2025 vs May 2024	▲ 4%	▲ 5%	▲ 5%	▲ 5%	▲ 4%
May 2025 vs May 2023	▲ 2%	▼ 1%	▼ 3%	▲ 15%	▲ 10%

(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 by Volume

May 2025

Overall, garden centre sales were up +4% by volume compared to May 2024, highlighting an increase in demand for garden goods.

Meanwhile, sales volumes were on par with May 2023. When excluding catering, volumes were up +3% compared to May 2024, but down -4% from May 2023.

Gardening sales by volume were down -8% from May 2023. However, March and April 2025 saw very strong gardening sales, and the slower performance in May 2025 may be a consequence of consumers buying their plants and outdoor equipment earlier in the year due to the good Spring weather.

Moreover, 2024 and 2023 experienced poor weather throughout the Spring, which could have led to pent-up demand that boosted May sales and footfall. May 2023 also had an extra bank holiday with the coronation of King Charles III, which may have encouraged consumers into their gardens.

Comparisons for non-gardening sales by volume were ahead of sales by value, demonstrating the strong performance of the category and relatively higher levels of price inflation.

	May 2025 vs May 2024		May 2025 vs May 2023	
	Sales Value *(£, Exc. VAT)*	**Sales Volume** *(n)*	**Sales Value** *(£, Exc. VAT)*	**Sales Volume** *(n)*
Overall *Incl. catering*	▲ 4%	▲ 4%	▲ 2%	= 0%
Overall *Excl. catering*	▲ 5%	▲ 3%	▼ 1%	▼ 4%
Garden/ gardening	▲ 5%	▲ 1%	▼ 3%	▼ 8%
Non-garden/ gardening *Incl. catering*	▲ 5%	▲ 8%	▲ 15%	▲ 15%
Non-garden/ gardening *Excl. catering*	▲ 4%	▲ 7%	▲ 10%	▲8%

Sources: HTA Garden Retail Monitor

Average Transaction Values (ATVs) and Transaction Numbers

In the garden store; May 2025

May 2025 saw transactions numbers in the garden store up +4% indicating higher footfall, meanwhile consumer spending per transaction showed signs of slowing as the ATV was flat compared to May 2024.

Garden store transactions were also up on May 2023 (+1%).

The ATV for May 2025 was £34.56 (exc VAT), which was on par with May 2024, however when accounting for inflation, this is effectively a fall in average basket size by consumers. Given the strong sales in March and April, this could be a result of consumers making their more significant purchases earlier in the year.

Transaction Numbers
(Garden Store):

+4%
MAY 2025 vs MAY 2024

+1%
MAY 2025 vs MAY 2023

Average Transaction Values (ATVs)
(Garden Store):

Excl. VAT
£ 34.56

Incl. VAT
£ 40.71

MAY 2025

vs May 2024 *(Excl. VAT)*	vs May 2023 *(Excl. VAT)*
0% (£34.42)	-2% (£35.15)

Source: HTA Garden Retail Monitor

Average Transaction Values (ATVs) and Transaction Numbers

In the café/restaurant; May 2025

Garden centre catering continued to grow steadily, with rises both in total transactions (+2%) and the average transaction value (+5%).

The number of total café transactions in May have continued to grow year-on-year, boosted by additional demand for gardening in the good weather. May 2025 saw total transactions rise +2% from May 2024 and +12% from May 2023, highlighting the growth of garden centre catering over the two year period.

Average transaction values also rose steadily in May 2025 to £12.27 (exc. VAT), up +5% from May 2024 and +7% from May 2023. However, these rises appear to be at least partially inflationary. For example, the median prices of hot drinks rose by +7%, children's meal prices rose by +5%, and cake prices rose by +3%, all since May 2024.

Transaction Numbers
(Café/Restaurant):

+2%

MAY 2025 vs MAY 2024

+12%

MAY 2025 vs MAY 2023

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

Excl. VAT
£ 12.27

Incl. VAT
£ 14.70

MAY 2025

vs May 2024 *(Excl. VAT)*	vs May 2023 *(Excl. VAT)*
+5% (£11.70)	+7% (£11.44)

Source: HTA Garden Retail Monitor

Gardening Products

Sales by value; May 2025

Overall, garden/gardening sales were up +5% by value from May 2024, but down -3% compared to May 2023. The fall relative to May 2023 appears to be primarily driven by falls in hardy plants, seeds and bulbs, with bulb sales down notably relative to previous Mays.

May 2025's plant sales were mixed relative to previous years. Bedding and indoor plants were up +5% and +11% relative to May 2024, whilst hardy plants were on par. However, compared to May 2023, bedding and hardy plants were down by -3% and -19% respectively. Indoor plants meanwhile were still up +3% from May 2023. Plants make up the greatest proportion of turnover in May, so contribute significantly to the overall sales performance (see page 11).

Seeds and bulb sales were down considerably in May 2025 from previous years; however, May is not as key a purchase month for these products as March & April are. Despite this, both categories remain well ahead of their year-to-end of May sales compared to 2024, suggesting consumer demand across these categories has already been met.

Garden features and furniture categories were among the strongest performers in May 2025, supported by the continued good weather throughout the month. Ultimately, all gardening categories remain well ahead of their total sales for the year-to-end of May compared to 2024, following the sunniest Spring on record.

Category	May 2025 vs 2024	May 2025 v 2024 YTD	May 2025 vs 2023
Bedding & other plants	▲ 5%	▲ 20%	▼ 3%
Hardy plants, shrubs & trees	= 0%	▲ 12%	▼ 19%
Indoor plants	▲ 11%	▲ 4%	▲ 3%
Bulbs	▼ 15%	▲ 10%	▼ 23%
Seeds (excl. grass seed)	▼ 9%	▲ 6%	▼ 8%
Plant care products	▲ 4%	▲ 16%	▼ 3%
Garden tools & equipment	▲ 20%	▲ 21%	▲ 1%
Outdoor containers	▲ 8%	▲ 14%	▲ 2%
Garden features & structures	▲ 14%	▲ 25%	▲ 13%
BBQs and Heating	▲ 9%	▲ 27%	▲ 6%
Garden Furniture	▲ 2%	▲ 10%	▲ 3%

Source: HTA Garden Retail Monitor

Non-Gardening Products

Sales by value; May 2025

In May 2025, non-gardening sales were up +5% by value from May 2024, and up +15% compared to May 2023. This performance is reflected in the sales growth observed across most non-gardening categories. However, wild bird care sales were behind 2024 and 2023 for a second consecutive month, bringing the year-to-end of May sales for the category -3% below 2024 levels.

Catering sales continued to stay strong in May 2025, with sales by value up +8% from May 2024 and up +21% from May 2023. This left total catering sales +11% ahead of their position relative to the end of May 2024.

Food and farm shop sales were particularly strong in May 2025, up +19% compared to 2024 and +28% compared to 2023. Indoor living sales also grew steadily, up +11% compared to May 2024 and up +10% from May 2023, marking a notable jump relative to the stability seen in previous years.

Pet and gifting categories also grew steadily. On the other hand, wild bird care sales were down -6% from May 2024, and down -2% from May 2023. April's wild bird care sales were also weaker than previous years. Consequently, wild bird care is the only category behind the total sales by value seen in May 2024.

Category	May 2025 vs 2024	May 2025 vs 2024 YTD	May 2025 vs 2023
Indoor living & homewares	▲ 11%	▲ 10%	▲ 10%
Gifting	▲ 7%	▲ 7%	▲ 12%
Wild bird care	▼ 6%	▼ 3%	▼ 2%
Pets	▲ 5%	▲ 5%	▲ 6%
Food & farm shop	▲ 19%	▲ 15%	▲ 28%
Catering	▲ 8%	▲ 11%	▲ 21%

Source: HTA Garden Retail Monitor

Category Shares by Value

May 2023-2025

In recent Market Updates, we've included the share of total monthly sales held by different garden centre categories, spanning the past 3 years. These figures help to contextualise movements in category sales with respect to the make-up of the full month.

The month of May is typically the largest month for live plants across the year, which together with bulbs and seeds made up 38% of May 2025's total turnover. This is down from previous years, although that is the result of lower seed and bulb sales in May 2025, as observed on page 9.

Garden care, maintenance (including tools, sundries, and equipment) and outdoor living make up the next largest shares of May's turnover. The strong weather in May 2025 was particularly beneficial for these gardening categories, particularly outdoor features and structures as highlighted on page 9.

Catering's share of monthly turnover was the fourth largest in May 2025, and has been increasing its share gradually since May 2023. The monthly shares held by outdoor containers and indoor living has also risen gradually year-on-year between May 2023 and May 2025, largely at the expense of outdoor plants. Remaining categories show little deviation between years, holding a stable share of May's total turnover.

Category	May 2025	May 2024	May 2023
Live plants, bulbs, & seeds	38%	39%	42%
Garden care & maintenance	12%	12%	12%
Outdoor living	10%	10%	10%
Catering	10%	10%	8%
Garden containers & structures	9%	8%	8%
Other non-garden products	5%	6%	5%
Homewares & floristry	4%	4%	3%
Food hall & farm shop	4%	3%	3%
Gifting	3%	3%	3%
Wild bird care, pets, & aquatics	3%	3%	3%
Other garden products	2%	2%	2%
Miscellaneous	1%	0%	0%

Source: HTA Garden Retail Monitor

Year-to-Date Sales

Calendar year to May 2025

For the year to end of May 2025, garden centre sales by value were +12% ahead compared to 2024 and 2023, underlining the exceptionally strong trade observed throughout the warm, dry Spring. All measures were at least +7% ahead of the year-to-end of May 2024, and at least +10% ahead relative to the year-to-end of May 2023 sales positions.

When catering is excluded, garden centre sales were +13% ahead of 2024 for the year to end of May, and +10% compared to 2023.

Although May 2025 was a slower month for gardening sales as compared to March and April, the category remains +15% ahead of the year-to-end of May position in 2024, and +10% ahead of 2023. This comes as no surprise, following the UK's warmest Spring since records began leading to a surge in gardening demand.

Meanwhile, non-gardening sales also remain well ahead of previous years, up 7% compared to 2024 and +11% compared to 2023 even when catering is excluded. Non-gardening sales have consistently outperformed previous years, highlighting how consumers are increasingly viewing garden centres as more than just a gardening retailer.

	Overall *Incl. catering*	**Overall** *excl. catering*	**Garden/ Gardening**	**Non-garden /gardening** *Incl. catering*	**Non-garden /gardening** *Excl. catering*
YTD May 2025 vs YTD May 2024	▲ 12%	▲ 13%	▲ 15%	▲ 9%	▲ 7%
YTD May 2025 vs YTD May 2023	▲ 12%	▲ 10%	▲ 10%	▲ 16%	▲ 11%

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

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Source: HTA Garden Retail Monitor

National Weather

May 2025 v May 2024

May 2025 was the UK's fifth-warmest May on record, capping off the UK's warmest spring since records began. Despite May of 2024 being the warmest May on record, May 2025 received 67% more hours of sunshine.

The average temperature in May 2025 was 12.0°C (including overnight temperatures), ranking as the UK's fifth-warmest May on record. This was down from 13.1°C in May 2025.

Meanwhile, the UK received 266.2 hours of sunshine in May 2025, a substantial rise from May 2024's 159.3 hours of sunshine. Consequently, May 2025 was the second-sunniest May since 1910.

Following the sunny weather, rainfall was down relative to May 2024. Total rainfall was 50.9mm in May 2025 – down 38% compared to May 2024. Meanwhile, the total number of 'rain days' was 7.1 in May 2025, down from 11.4 in May 2024 and the 12th-fewest since 1891.

Following a prolonged period of low rainfall and high temperatures, the risk of drought or hosepipe bans continues to be monitored by the HTA. Pages 15 and 16 offer more information on the UK's current water situation.

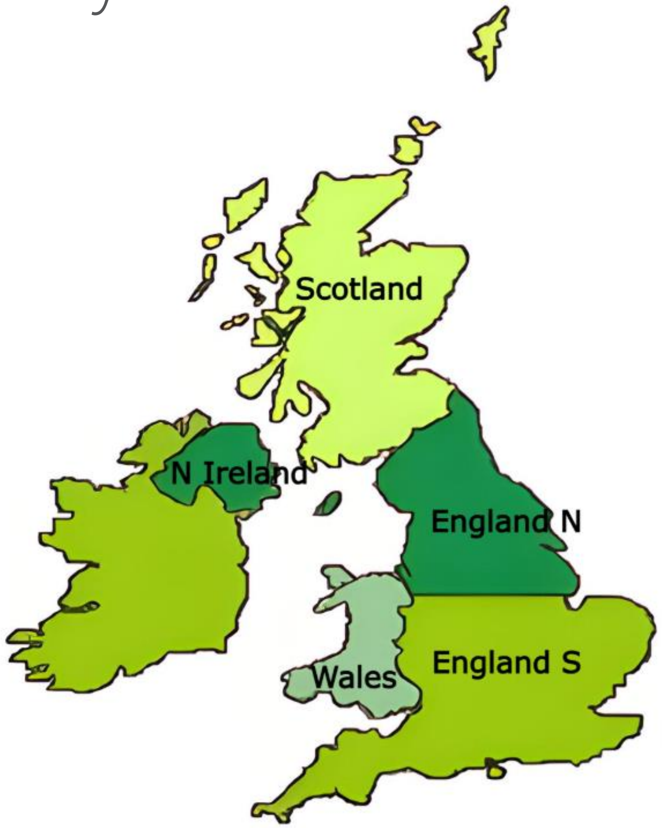
The figures reported are national averages for the UK. To view the figures yourself, **click or tap here** to visit the MET Office website and view the year ordered stats by month.

	May 2025	May 2024
Mean temperature (°C)	12.0	13.1
Hours of sunshine	266.2	159.3
Total Rainfall (mm)	50.9	82.5
No. of rain days (>1mm/day)	7.1	11.4

Source: MET Office

Regional Weather

May 2025



Map of UK climate regions, used to generate regional climatologies. (Met Office)

May 2025 overall was sunny, warm and dry across the UK.

There were scattered periods of showers and thunderstorms in isolated regions, but overall, every region benefitted from the area of high pressure sitting over the UK for much of the month.

May 2025 was the sunniest May on record for Scotland and Northern Ireland, whilst Southern England saw less than half of the average rainfall for May.

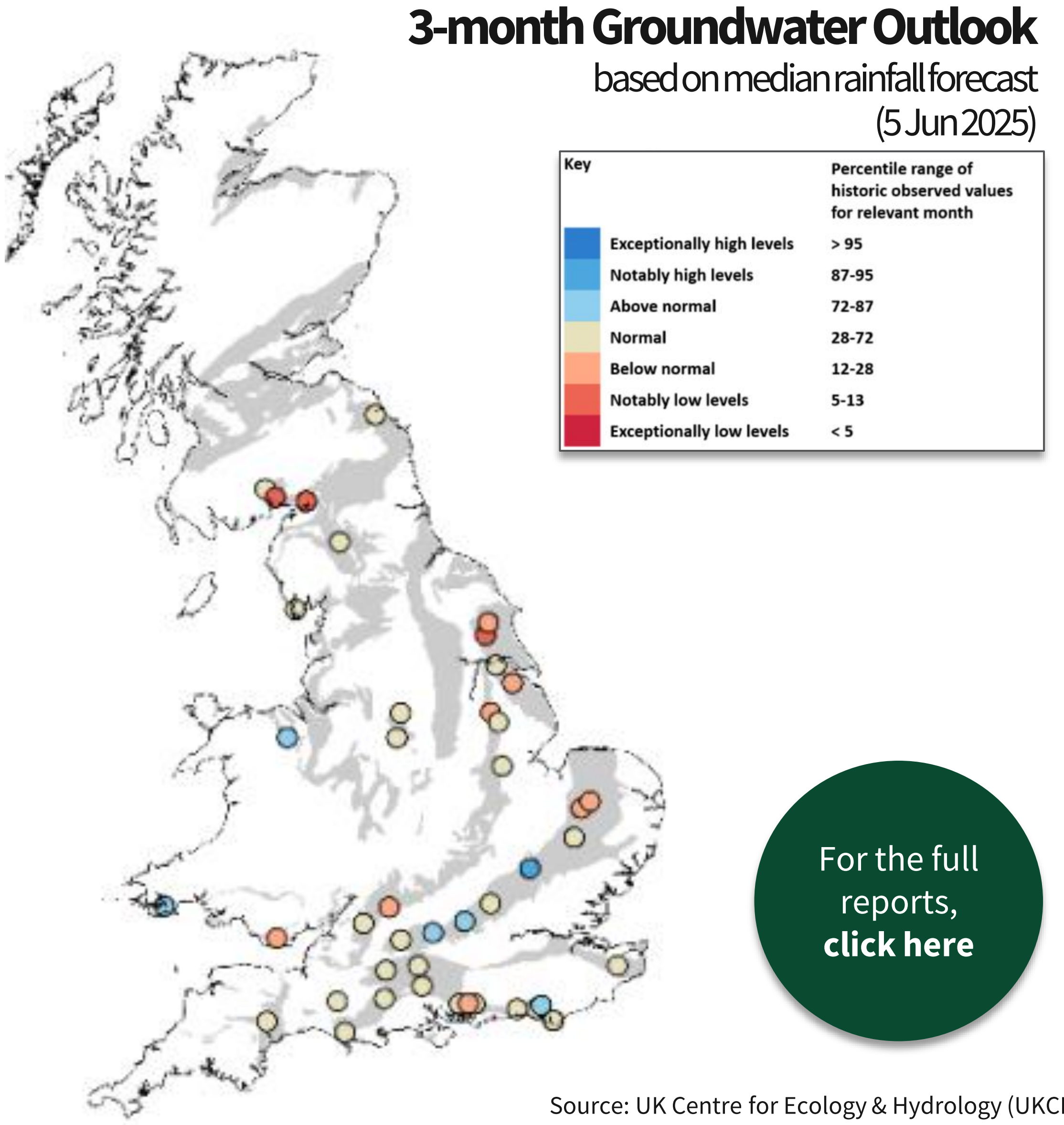
Region	Mean Temp (°C)	Hours of sunshine	Rainfall (mm)	Rain days (>1mm/day)
Overall	**12.0**	**266.2**	**82.5**	**11.4**
Scotland	10.3	270.2	80.0	8.6
Northern Ireland	12.1	283.9	56.7	8.6
North England	12.0	264.2	45.5	6.9
South England	13.4	259.4	26.0	5.3
Wales	12.1	270.2	51.5	7.9

Source: MET Office

Forecast Groundwater Levels

As of the end of May 2025, based on median rainfall forecasts groundwater levels are expected to be normal over the subsequent three months, despite the dry Spring.

Areas of the North of England are expected to have lower levels than the rest of the UK. The HTA continues to represent horticulture on the Environment Agency's National Drought Group and is closely monitoring the impact of any ongoing dry weather on water resources and threat of water use restrictions (more on page 16).



Source: UK Centre for Ecology & Hydrology (UKCEH)

For the full reports, **click here**

Current Reservoir Levels

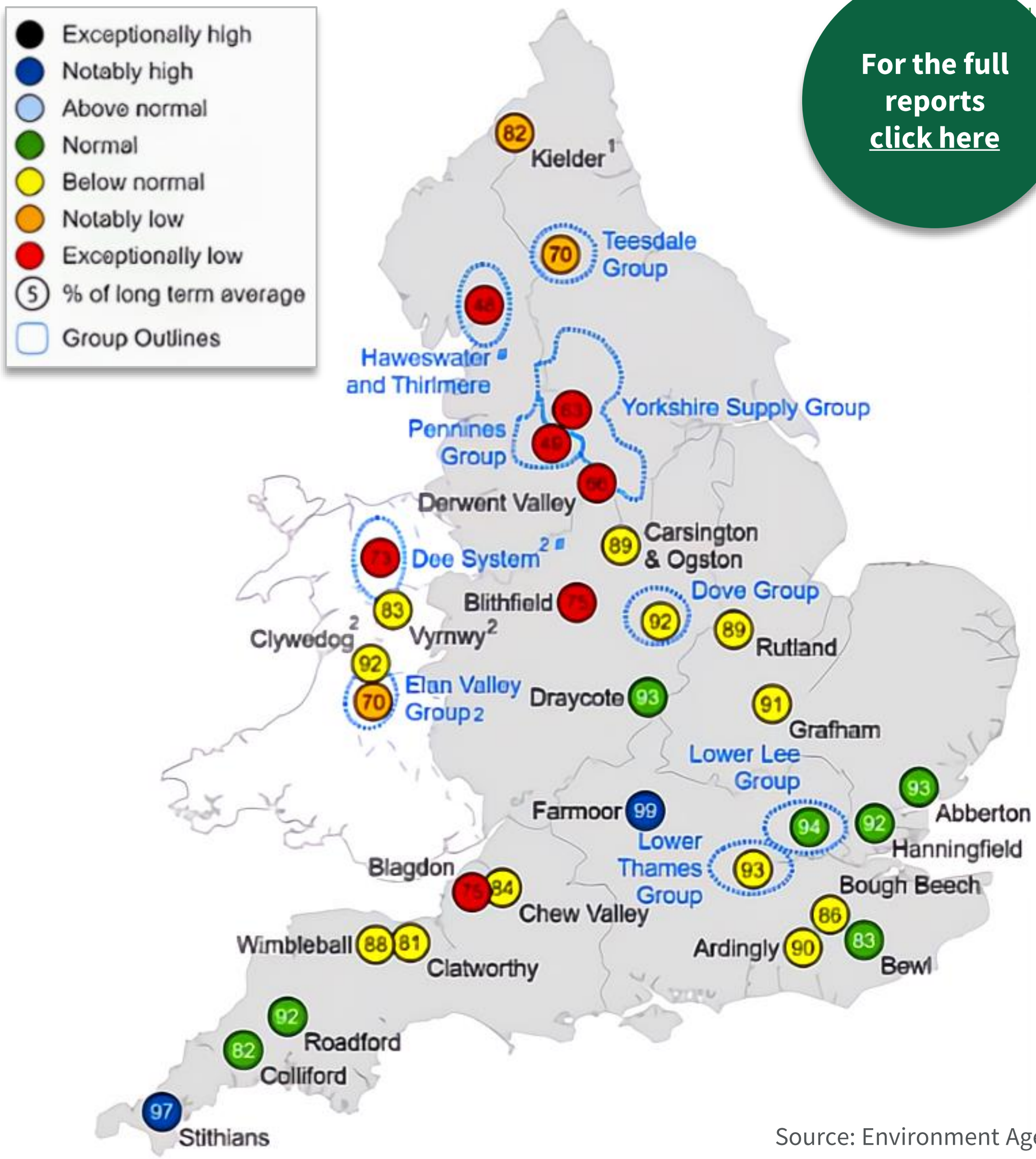
England and Wales; May 2025

Following the driest Spring since 1974, reservoir levels are below normal across much of the UK, with total reservoir storage at 77%. HTA continues to attend meetings of the National Drought group and monitor the situation.

The chart to the right shows the reservoir levels at a selection of sites across the UK. Whilst levels in the Southeast and Southwest of England are around normal for the time of year, areas of Northwest England have very low levels. Total reservoir storage at the end of May was 77%, compared to the long-term average of 93% for the end of May.

Whilst the UK continues to experience prolonged dry weather, there is no immediate threat of water use restrictions. We can however expect more compliance checks on businesses who are abstracting water, and increased monitoring of river and groundwater levels.

The HTA is monitoring the situation closely and is preparing guidance for members, and for members to provide to customers in the event of any restrictions. Members are encouraged to use water responsibly, and can access the HTA's updates, advice and guidance for improving resilience here.



For the full reports click here

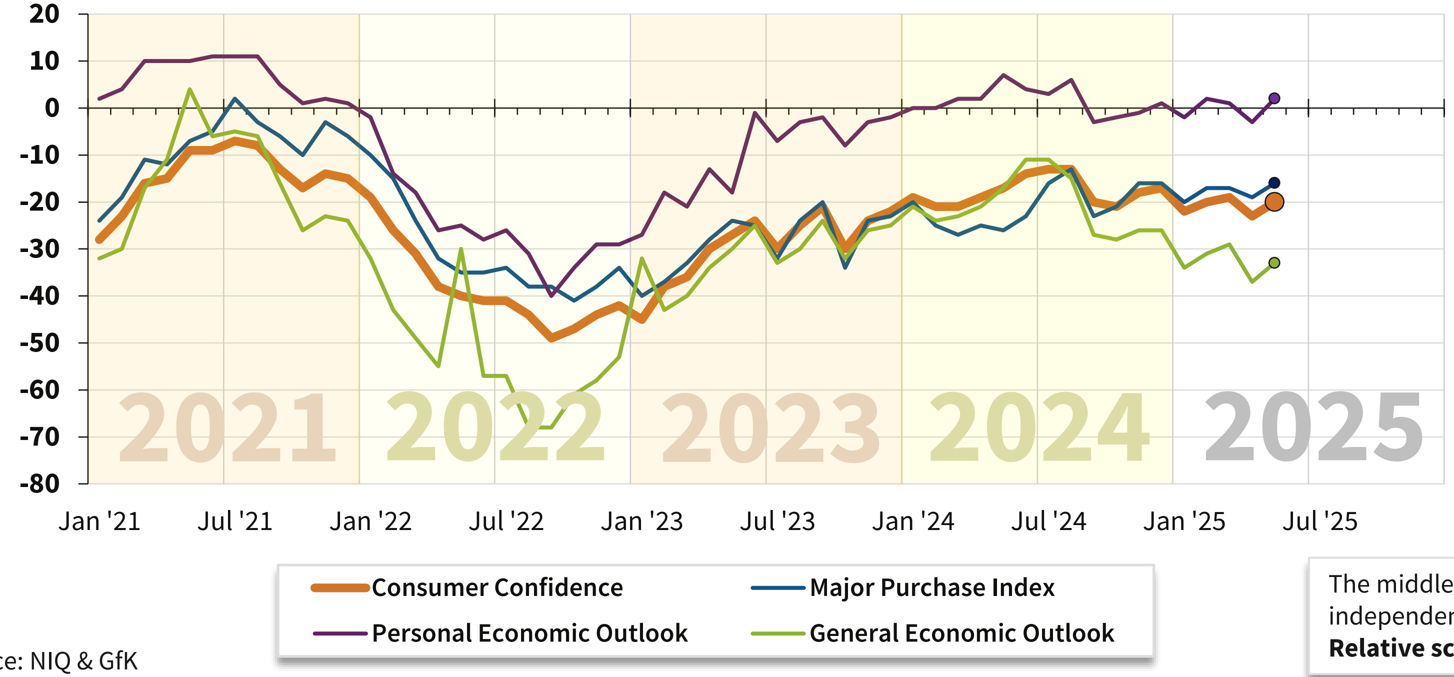
Source: Environment Agency

Consumer Confidence

Consumer confidence rose slightly in May 2025, with improvements across all 5 indicators causing the overall index to rise 3 points to -20 overall. However, overall confidence remains generally cautious in historic terms.

The measure for personal financial outlooks turned positive, rising +5 points up to 2. However, this measure was 5 points lower than at this point last year (May 2024). General economic outlooks rose +4 points to -33 but likewise remained -16 points down compared to May 2024.

Meanwhile, the Major Purchase Index (MPI) rose 3 points in May 2025, indicating consumers were slightly more likely to think it's a good time to be making major purchases for big-ticket items such as furniture or electrical goods. This marks the highest MPI score since the end of 2024. Moreover, the savings index fell -2 points 28, indicating that consumers were slightly more relaxed about spending rather than saving compared to April 2025.



Source: NIQ & GfK
Base: 2,007 UK Individuals aged 16+, interviewed May 1st – May 14th 2025.

Measure	Relative score (May 2025)	vs Apr 2025
Overall Consumer Confidence	**-20**	**▲ 3**
Personal financial outlook (next 12 months)	2	▲ 5
General economic outlook (next 12 months)	-33	▲ 3
Major Purchase Index	-16	▲ 2
Savings Index	*28*	*▼ 2*

The middle three measures in the table make up the overall index score. The Savings Index is independent and 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.**

Inflation and Wages

April 2025 saw a slight bump to the Consumer Prices Index including owner occupiers' housing costs (CPIH) inflation rate, rising from 3.4% to 4.1%, although the Bank of England still opted to cut interest rates at the start of May by -0.25%. Meanwhile, pay growth has continued to fall, down by -0.8% and narrowing the gap between inflation and wages.

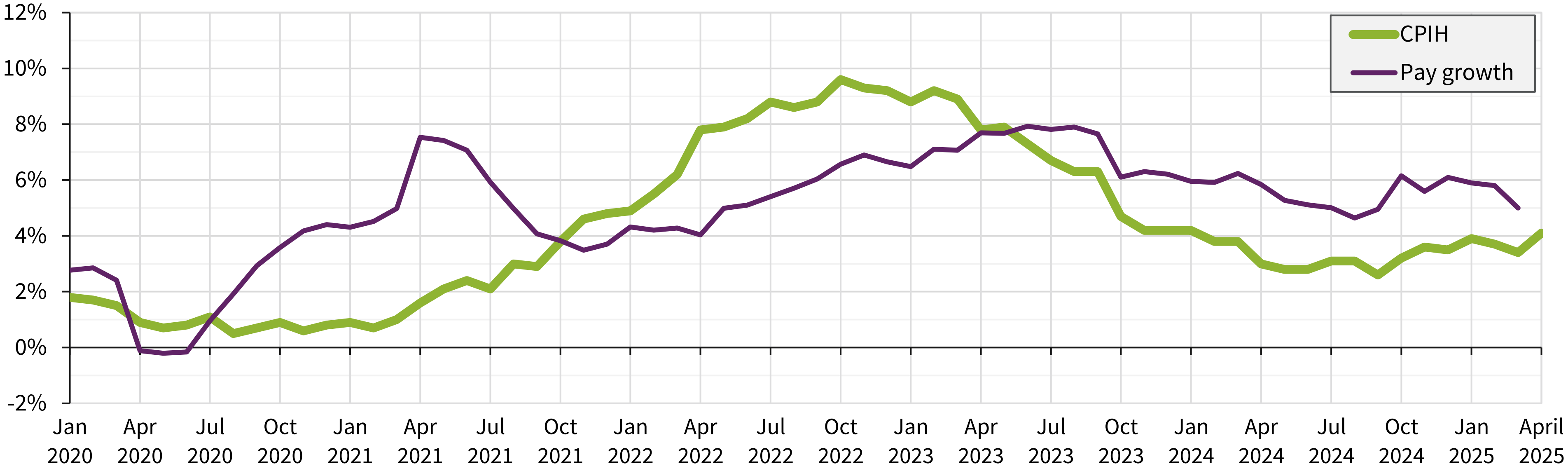
Despite the slowing rise in average weekly earnings (down from 5.8% in February 2025 to 5.0% in March 2025), pay growth remains ahead of inflation. However, this gap may be starting to narrow. If inflation overtakes pay growth, this could result in consumer's budgets being squeezed and limiting their spending power.

Meanwhile, the unemployment rate for January-March 2025 sat at 4.5%, only 0.2% higher than at this time last year. This is the highest UK unemployment rate since August 2021, although not historically significant.

CPIH inflation (Apr 2025) **= 4.1%**

Average Weekly Earnings: Regular pay growth (Mar 2025) **= 5.0%**

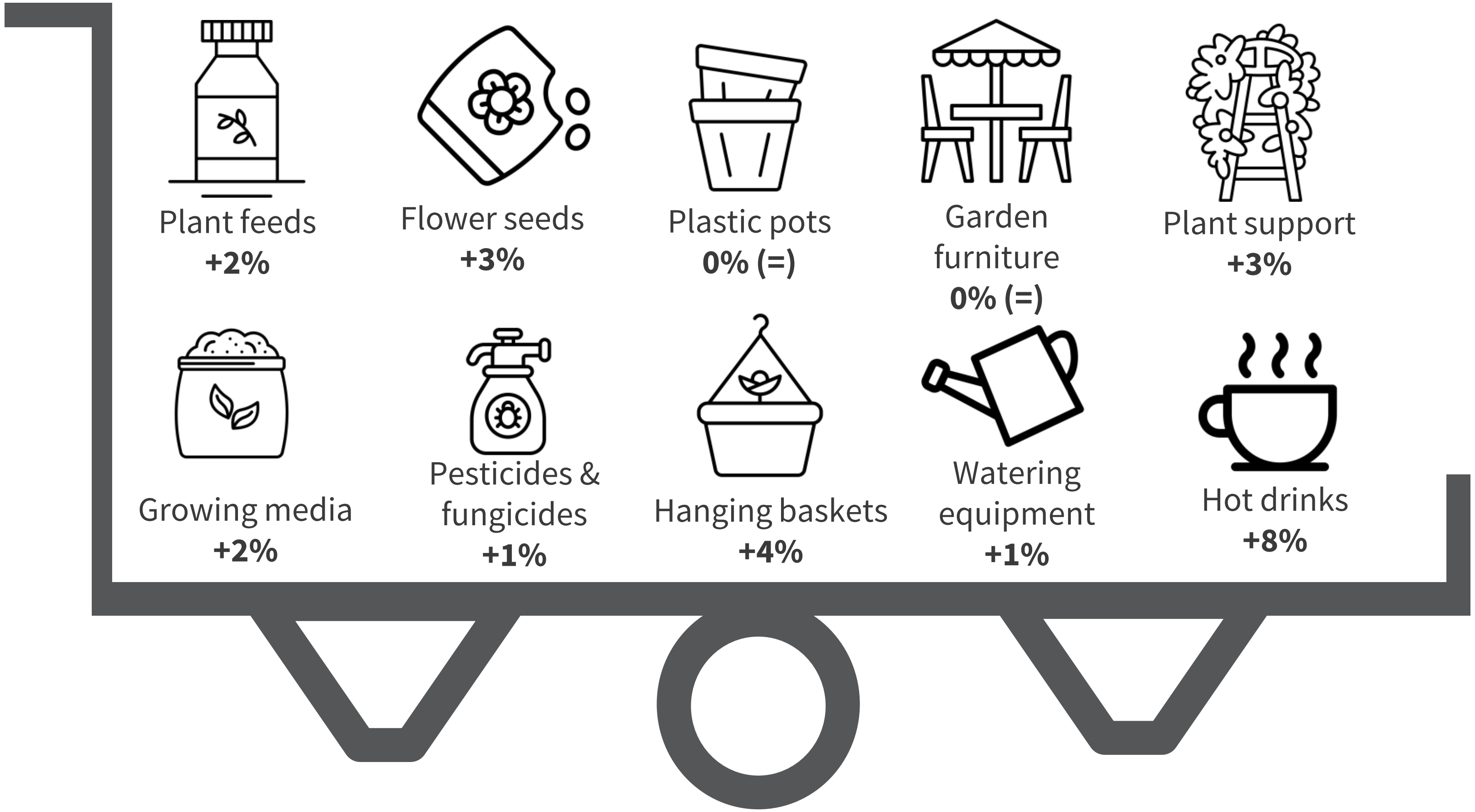
Unemployment Rate (Jan-Mar 2025) **= 4.5%**



Source: ONS

Retail Inflation

May 2025 v May 2024 price inflation



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

Across our May 2025 basket, prices of goods in garden centres were largely tracking below the overall UK CPIH inflation rate of 4.1%.

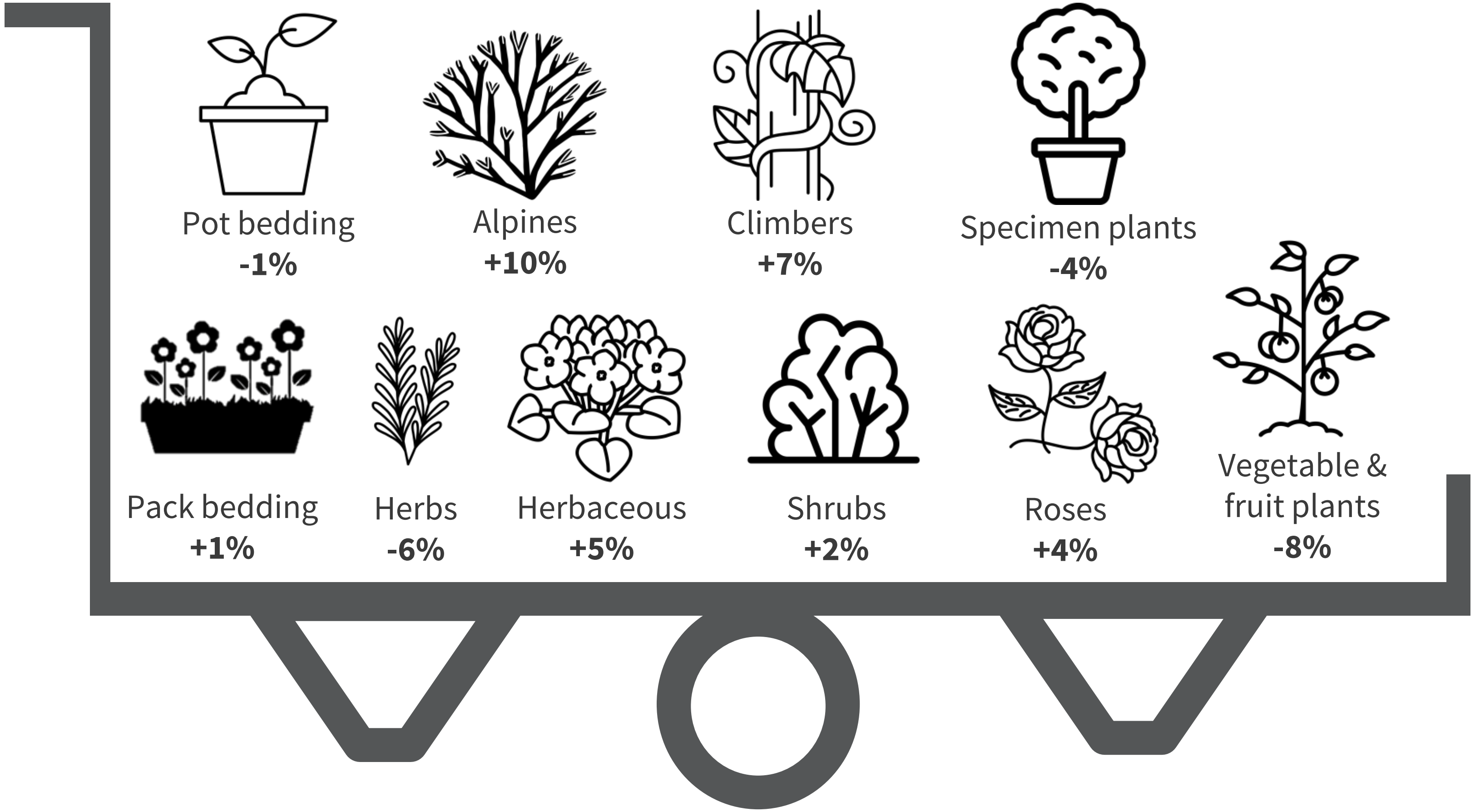
Hot drinks experienced the highest levels of price inflation compared to May 2024 (+8%), contributing to the rise in ATV within the café/restaurant (+7%). This was followed by (empty) hanging baskets (+4%), flower seeds and plant support (+3%).

Prices of bigger ticket garden furniture items and plastic pots, maintained prices on par with May 2024.

Source: HTA Garden Retail Monitor

Retail Inflation on Plants

May 2025 v May 2024 price inflation



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

Alpines (+10%) and climbers (+7%) experienced the greatest price rises in garden centres, whilst the average price per unit fell for vegetable and fruit plants (-8%), herbs (-6%) and specimen plants (-4%). These figures could represent an increase in multi-buy offers or discounting.

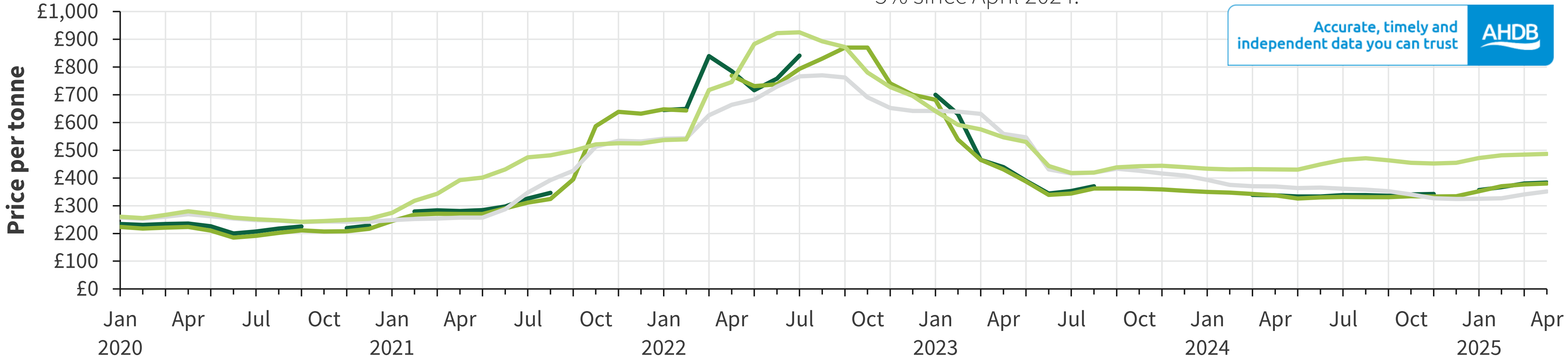
Source: HTA Garden Retail Monitor

UK Fertiliser Prices

UK fertiliser prices have largely remained steady since June 2023. Prices for ammonium nitrate however have been increasing steadily since September 2024 – rising by +15% between September 2024 and April 2025.

Each month, we report the latest prices of a selection of fertiliser components. Whilst not an exhaustive list of those used by the industry, they are indicative of any rising fertiliser costs that would increase the likelihood of squeezed margins throughout the supply chain. Using data supplied by the AHDB, the below graph shows how fertiliser prices have changed since 2020.

Triple super phosphate prices have also risen in the last year, up +13% compared to April 2024. Conversely, muriate of potash prices have fallen -5% since April 2024.



All prices are based on a price per tonne for:

- Full load
- Standard 28-day payment terms
- Bags delivered to site price
- Spot price: prices for delivery within a month (28 days)

Shipping Container Prices

Drewry's World Container Index (WCI) of shipping container prices rose 70% in the 4 weeks to beginning of June, and further volatility is predicted. Global supply chains continue to face considerable disruption over the everchanging application of US tariffs.

Each month, we report on a composite index which is an aggregate of major shipping costs across various routes. The Drewry World Container Index (WCI) was at $3,527 per 40ft container as of June 5th, 2025.

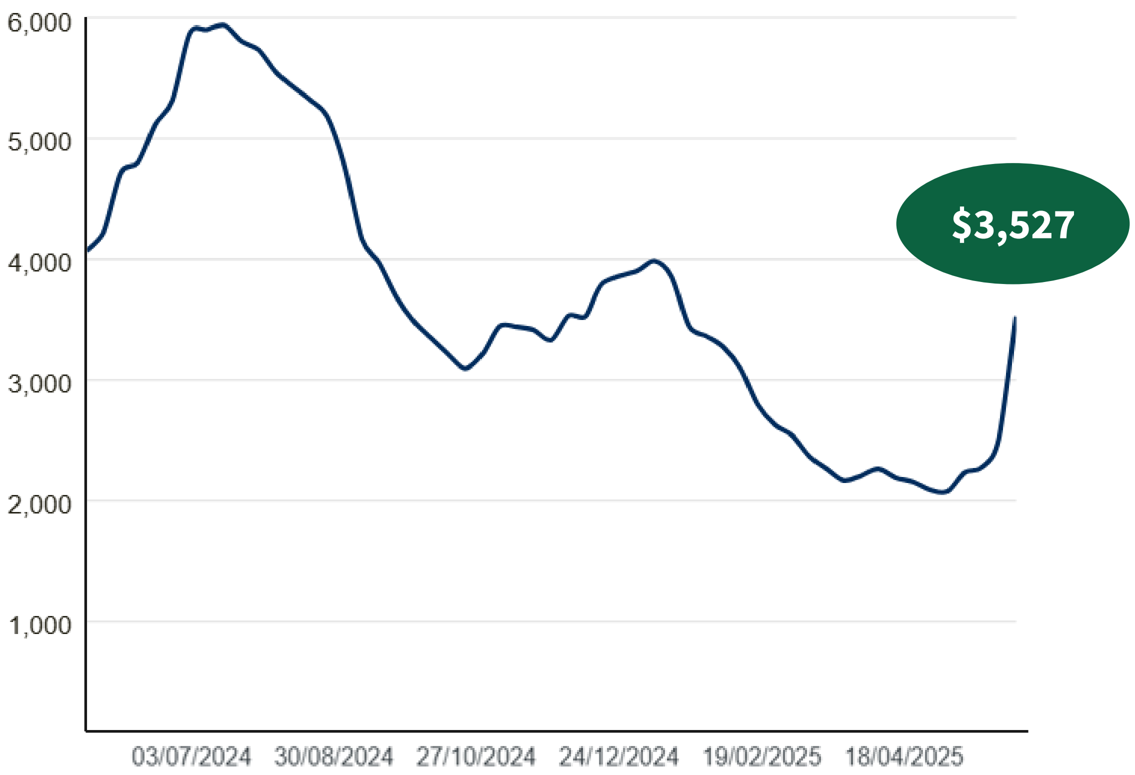
Container prices had been on a downward trajectory since the start of 2025. US tariffs that were imposed in April 2025 led to a collapse in transpacific trade. President Donald Trump's "pause" to Chinese tariffs led to a surge in demand, resulting in rapid inflation of container prices.

On 28th May 2025, President Trump's reciprocal tariffs were declared unlawful but remain in place whilst the challenge is heard in the Court of Appeals. Irrespective of the outcome, the risk of further executive interference to US import tariffs, both new and existing, remains likely.

Future container prices will depend on both the outcome of the legal challenges to Trump's tariffs, as well as the capacity changes resulting from US/China tariffs. The consequence of declining transpacific trade capacity remain unrealised and uncertain; it is not 'priced in' to current container prices.

Drewry World Container Index (WCI)

5th June 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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