HTA

Market Update

July 2025

Contents

Overview

- Following a strong spring, June 2025 showed signs of sales slowing down in garden centres, suggesting that consumer's demand for gardening products had already been met earlier in the year.
- Overall garden centre sales were down -5% by value in June 2025 when compared with June 2024. Spring sales were particularly low in 2024 due to poor weather, which led to pent-up demand in the summer of 2024.
- Sales of gardening products in June 2025 were down -8% by value compared to June 2024, and down -19% compared to June 2023. However, June 2023 was the UK's hottest June since records began, following a damp Spring, which also boosted sales for June 2023.
- Non-gardening sales remained resilient in June 2025, up +2% by value compared to both June 2024 and 2023. Non-gardening sales have tracked above previous years each month since the start of 2025, with the category up +8% for the year-to-end of June, compared to 2024. Within this, garden centre cafes continue to exhibit stable growth, with catering sales up +2% compared to June 2024 and up +16% compared to June 2023.
- June's weather was mixed, with low pressures causing wet and stormy weather earlier in the month. Nevertheless, June 2025 was the UK's second hottest June (behind 2023), England's hottest June, and Wales's third-hottest June since records began.
- As a result of the hot weather, most UK regions are now in drought, with the first water restrictions were introduced by Yorkshire Water on 11th July 2025 and Kent & Sussex via South East Water on 18th July 2025. More restrictions are likely should the lack of rainfall continue. You can find the HTA's guidance on UK water restrictions **here.**
- Consumer confidence remains low but continues to recover, with the overall index improving by 2 points since May 2025. This marks the highest score of 2025 so far, but at -18 overall, the score remains low in the long term.
- An exceptional Spring meant that garden centre sales were ahead of previous years across all categories. Although a slower June has led to this lead becoming squeezed, the overall picture remains largely positive for garden centres at the close of the year's peak trading period.

Read on for all the detail…

Key Points

June 2025

Overall garden centre sales were down -5% compared to June 2024

June 2025 was the UK's second hottest June on record

Consumer confidence remains low at -18 overall, up 2 pts from May 2025

Gardening sales were down by -8% compared to June 2024

Catering continues to grow steadily, up +2% by value compared to June 2024

Garden Centre Sales

June 2025

Garden centre trade slowed down substantially in June 2025, in comparison to previous months. Overall sales were down -5% by value compared to June 2024, and down -10% by value compared to 2023.

The past 3 months saw substantial increases in sales by value and across all headline categories, however, June 2025 marks an end to the exceptional trend. When catering was excluded, overall sales were down -6% compared to June 2024, and down -13% compared to June 2023.

The fall in June 2025's overall sales relative to previous years appears to be driven by a lack of gardening sales, down -8% compared to June 2024 and down -19% compared to June 2023. Spring 2024 experienced very poor weather, resulting in a later gardening season. This likely explains why June 2025 appears weaker in comparison.

Whilst June 2023 is the hottest June on record (which would have supported sales that month), it's more likely that consumer demand for gardening products had already been met, following a very strong performance throughout Spring 2025.

Meanwhile, non-gardening sales continued to show resilience, with sales up +2% compared to June 2024 and up +10% from June 2023 when catering was included. Although this may appear inflationary, page 6 shows that non-gardening volumes also rose in June 2025.

	Overall *Incl. catering*	**Overall** *excl. catering*	**Garden/ Gardening**	**Non-garden /gardening** *Incl. catering*	**Non-garden /gardening** *Excl. catering*
June 2025 vs June 2024	▼ 5%	▼ 6%	▼ 8%	▲ 2%	▲ 2%
June 2025 vs June 2023	▼ 10%	▼ 13%	▼ 19%	▲ 10%	▲ 6%

(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

June 2025

Overall, garden centre sales were down -5% by volume compared to June 2024, and down -6% compared to June 2023.

When catering was excluded, June 2025's overall sales volumes were down -8% from June 2024 and down -12% compared to June 2023.

In a similar story to the sales value, the fall in performance relative to previous years comes from a fall in gardening sales in June 2025. Sales were down -12% by volume compared to June 2024, and down -19% by volume compared to June 2023.

Conversely, non-gardening sales by volume were level or up on previous years. When including catering, June 2025 volumes were up +4% compared to June 2024, and up +10% compared to June 2023.

	June 2025 vs June 2024		June 2025 vs June 2023	
	Sales Value *(£, Exc. VAT)*	**Sales Volume** *(n)*	**Sales Value** *(£, Exc. VAT)*	**Sales Volume** *(n)*
Overall *Incl. catering*	▼ 5%	▼ 5%	▼ 9%	▼ 6%
Overall *Excl. catering*	▼ 6%	▼ 8%	▼ 13%	▼ 12%
Garden/ gardening	▼ 8%	▼ 12%	▼ 19%	▼ 19%
Non-garden/ gardening *Incl. catering*	▲ 2%	▲ 4%	▲ 10%	▲ 10%
Non-garden/ gardening *Excl. catering*	▲ 2%	▲ 7%	▲ 6%	▲ 17%

Sources: HTA Garden Retail Monitor

Average Transaction Values (ATVs) and Transaction Numbers

In the garden store; June 2025

Total transactions fell to a three-year low for the month of June in 2025, down -5% compared to June 2024 and down -6% from June 2023. Meanwhile, transaction values remained on par with June 2024, but down -7% compared to June 2023.

June was the first month of 2025 where total transactions were below the level seen in 2024 and 2023. This both underlines the notable footfall that's been observed since the start of the year, as well as the slowdown in consumer visits to garden centre seen in June 2025.

Average transaction values were also at a three-year low for June in 2025, albeit only marginally when compared to June 2024. Consumers typically spent £30.36 per visit (excluding VAT) in June 2025, remaining some way off (-7%) the average spend in June 2023 at £32.73 per transaction.

Transaction Numbers
(Garden Store):

-5%

June 2025 vs June 2024

-6%

June 2025 vs June 2023

Average Transaction Values (ATVs)
(Garden Store):

Excl. VAT
£ **30.36**

Incl. VAT
£ **35.77**

June 2025

vs June 2024 *(Excl. VAT)*	vs June 2023 *(Excl. VAT)*
(=) 0% (£30.50)	**-7%** (£32.73)

Source: HTA Garden Retail Monitor

Average Transaction Values (ATVs) and Transaction Numbers

In the café/restaurant; June 2025

Garden centre catering continued to exhibit modest growth in June 2025, with total transactions up +2% from June 2024 and +8% from June 2023. Average consumer spend per transaction was almost exactly on par with June 2024.

The number of total café transactions in June continues the trend of steady growth in garden centre catering. The sunny weather throughout June will have made a positive contribution to café transactions, although garden centre cafes that do not have air con may have seen more muted sales considering the heat.

Similar to the rest of the garden centre, average spend (excluding VAT) in garden centre cafés for June 2025 (£11.84) was also on par with June 2024 (£11.83). Given inflation across catering products, with hot drink prices up +7% year-on-year, this comparison masks a real-terms fall in ATV between June 2024 and 2025.

Transaction Numbers (Café/Restaurant):

+2%
June 2025 vs June 2024

+8%
June 2025 vs June 2023

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

Excl. VAT
£ 11.84

Incl. VAT
£ 14.18

June 2025

vs June 2024 *(Excl. VAT)*	vs June 2023 *(Excl. VAT)*
(=)0% (£11.83)	+7% (£11.03)

Source: HTA Garden Retail Monitor

Gardening Products

Sales by value; June 2025

Overall garden/gardening sales were down -8% and -19% from June 2024 and 2023 respectively. When broken down by category, all gardening products were down compared to June 2024 except for BBQs and garden furniture. However, all garden categories remain ahead for sales by value compared to the year-to-end of June 2024.

Outdoor plant sales in June 2025 were down -12% compared to June 2024, and down around -20% compared to June 2023. June 2023 was the hottest summer on record following a wet spring, whereas June 2024 experienced 'pent up' demand for gardening products following a prolonged period of poor weather.

Additionally, the strong gardening sales throughout Spring 2025 will have led to reduced demand for these products in June 2025, with some consumers having already invested substantially in their gardens.

BBQs and garden furniture were the only categories that grew in June 2025 compared to June 2024, with a +4% rise in BBQ and heating sales and a +2% rise in garden furniture sales. However, both categories were down substantially on June 2023, particularly garden furniture at -36%. This is likely a consequence of both the strong furniture sales earlier in the year (up +8% for the year to date), as well as the pandemic affecting the replacement cycle for their outdoor furniture.

Category	June 2025 vs 2024	June 2025 v 2024 YTD	June 2025 vs 2023
Bedding & other plants	▼12%	▲12%	▼21%
Hardy plants, shrubs & trees	▼12%	▲8%	▼19%
Indoor plants	▼6%	▲3%	▲3%
Seeds (excl. grass seed)	▼11%	▲6%	▼10%
Plant care products	▼10%	▲12%	▼11%
Garden tools & equipment	▼9%	▲15%	▼22%
Outdoor containers	▼6%	▲10%	▼9%
Garden sundries	▼6%	▲7%	▼8%
Garden features & structures	▼4%	▲19%	(=) 0%
BBQs and Heating	▲4%	▲21%	▼4%
Garden Furniture	▲2%	▲8%	▼36%

Source: HTA Garden Retail Monitor

Non-Gardening Products

Sales by value; June 2025

Non-gardening sales grew by +2% by value compared to June 2024, and +10% compared to June 2024. Most non-gardening categories were up on previous years, although wild bird care continues to perform below 2024 levels for a third consecutive month.

Catering sales continued to grow in June 2025, with sales by value up +2% from June 2024 and up +16% from June 2023. For the year to date, catering is now +10% ahead of 2024's total spend.

Food and farm shop sales were the strongest performer in June 2025, up +6% compared to 2024 and +24% compared to 2023. Both indoor living and gifting also had higher sales than in June 2024 and 2023.Pet sales were down by -1% in June 2025 compared to June 2024, although ahead of June 2023 sales by +5%.

However, wild bird care sales were down substantially in June 2024, down -14% from June 2024. Although wild bird care sales were up +3% from June 2023, the category has continued to track below 2024 levels for a third consecutive month, leaving the category -3% behind 2024's year-to-end of June total sales by value.

Category	June 2025 vs 2024	June 2025 vs 2024 YTD	June 2025 vs 2023
Indoor living & homewares	▲ 3%	▲ 9%	▲ 7%
Gifting	▲ 4%	▲ 7%	▲ 8%
Wild bird care	▼ 14%	▼ 3%	▲ 3%
Pets	▼ 1%	▲ 5%	▲ 5%
Food & farm shop	▲ 6%	▲ 13%	▲ 24%
Catering	▲ 2%	▲ 10%	▲ 16%

Source: HTA Garden Retail Monitor

Category Shares by Value

June 2023-2025

Since the start of 2025, we've included the share of total monthly sales held by different garden centre categories, spanning the past 3 years. These figures help to provide context to the changes in sales covered in Market Update, as well as highlighting any short-term changes in consumer purchasing over the last 2 years.

Following poor gardening sales, the share of June sales held by live plants, bulbs, and seeds has fallen for a consecutive year, down from 34% in June 2023 to 30% in June 2025. This is reflective of plant purchasing occurring earlier in the year due to a warm Spring. Despite this, plant sales remain the largest contributor to garden centre turnover in June 2025.

Catering remains the second largest category in June garden centre sales at 12%, remaining ahead of outdoor living and garden care and maintenance for a second consecutive year. The fluctuation in outdoor livings share of total sales underlines the effect of the delayed replacement cycles for outdoor furniture discussed on page 10.

With the strong performance of non-gardening products and weak performance of gardening products, the share previous held by live plants and outdoor living are broadly redistributed across non-gardening categories such as gifting, farm shop, homewares, and other non-garden products. Other categories remain broadly stable year-on-year.

Category	June 2025	June 2024	June 2023
Live plants, bulbs, & seeds	30%	33%	34%
Catering	12%	12%	10%
Outdoor living	11%	10%	14%
Garden care & maintenance	10%	11%	11%
Garden containers & structures	9%	9%	8%
Other non-garden products	7%	6%	6%
Homewares & floristry	5%	5%	4%
Food hall & farm shop	5%	5%	4%
Gifting	4%	4%	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 June 2025

For the year to end of June 2025, overall sales by value were +10% ahead of June 2024 and +8% ahead of June 2023. The strong sales over the Spring period continue to give a healthy buffer in the face of the summer slowdown.

When catering is excluded, garden centre sales were +10% ahead of 2024 for the year to end of June, and +6% compared to 2023. Gardening sales also remain +11% ahead of the year to end of June 2024, and +4% ahead of 2023.

Although the strong Spring sales gave garden centres a substantial lead on previous years' sales, a slower June has started to shorten this lead. Steady sales will be needed through the coming months in order to maintain growth on prior years and to accommodate any rising overhead costs.

Following continued strong performance in non-gardening sales in June 2025, the category continued to outpace previous years. Total non-gardening sales to the end of June were +8% ahead of 2024, and +14% ahead of 2023. When catering is excluded, non-gardening sales were still +11% ahead of 2023.

	Overall *Incl. catering*	**Overall** *excl. catering*	**Garden/ Gardening**	**Non-garden /gardening** *Incl. catering*	**Non-garden /gardening** *Excl. catering*
YTD June 2025 vs YTD June 2024	▲ 10%	▲ 10%	▲ 11%	▲ 8%	▲ 8%
YTD June 2025 vs YTD June 2023	▲ 8%	▲ 6%	▲ 4%	▲ 14%	▲ 11%

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

How are these figures calculated?

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Source: HTA Garden Retail Monitor

National Weather

June 2025 v June 2024

June 2025 was the UK's second-warmest June on record, continuing the trend of warmer temperatures and increased hours of sunshine. Meanwhile, total rainfall was moderate throughout June 2025.

The average temperature in June 2025 was 15.2°C (including overnight temperatures), ranking as the UK's second-warmest June on record. This was up from 12.9°C in June 2024, with June 2023 being the hottest June on record with a mean temperature of 15.8°C.

The UK also received more hours of sunshine in June 2025 than in June 2024, with 192.1 hours of sunshine observed. Compared to previous years, this was slightly above the average, albeit not significantly so.

Despite the heat, the UK received slightly more rainfall in June 2025 than in June 2024, with an increase in total rainfall of 44%. The total number of rain days was also up slightly in June 2025 – from 10.1 to 12.5.

Following several months of substantially low rainfall and high temperatures, the slightly wetter June has not been substantial enough to prevent most water companies from moving to at least drought level 1. More information on the UK's current water situation can be found on pages 14 and 15.

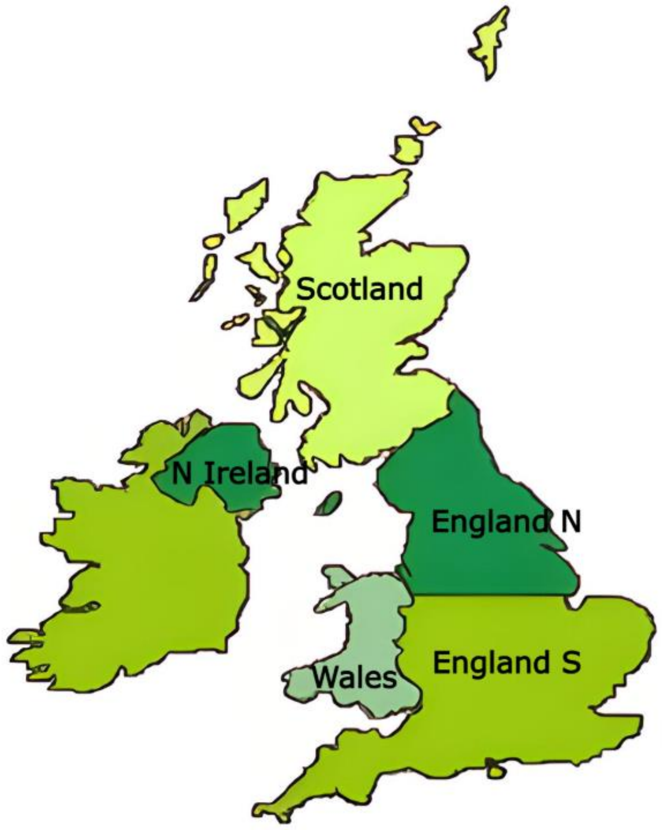
The figures reported are national averages for the UK. To view the figures yourself, click or tap here to visit the MET Office website and view the year ordered stats by month.

	June 2025	June 2024
Mean temperature (°C)	15.2	12.9
Hours of sunshine	192.1	178.3
Total Rainfall (mm)	79.5	55.4
No. of rain days (>1mm/day)	12.5	10.1

Source: MET Office

Regional Weather

June 2025



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

Overall, June 2025 saw mixed weather across the UK, with high temperatures and sunshine leading to England's warmest June on record, whilst low pressure led to unsettled and stormy conditions at times throughout the month.

The South of England was comfortably the warmest region at 17.4°C. Scotland, Northern Ireland, and Wales received notably more rainfall than England, although it was also Wales' third warmest June on record.

Total rainfall across the UK was slightly above average for June 2025, and with page 15 outlining the impact this has had on groundwater levels across the North of England.

Region	Mean Temp (°C)	Hours of sunshine	Rainfall (mm)	Rain days (>1mm/day)
Overall	**15.2**	**192.1**	**79.5**	**12.5**
Scotland	12.7	140.3	112.0	16.6
Northern Ireland	14.1	122.7	103.9	16.1
North England	15.8	208.8	74.2	12.0
South England	17.4	246.4	40.1	8.0
Wales	15.3	173.9	114.0	15.0

Source: MET Office

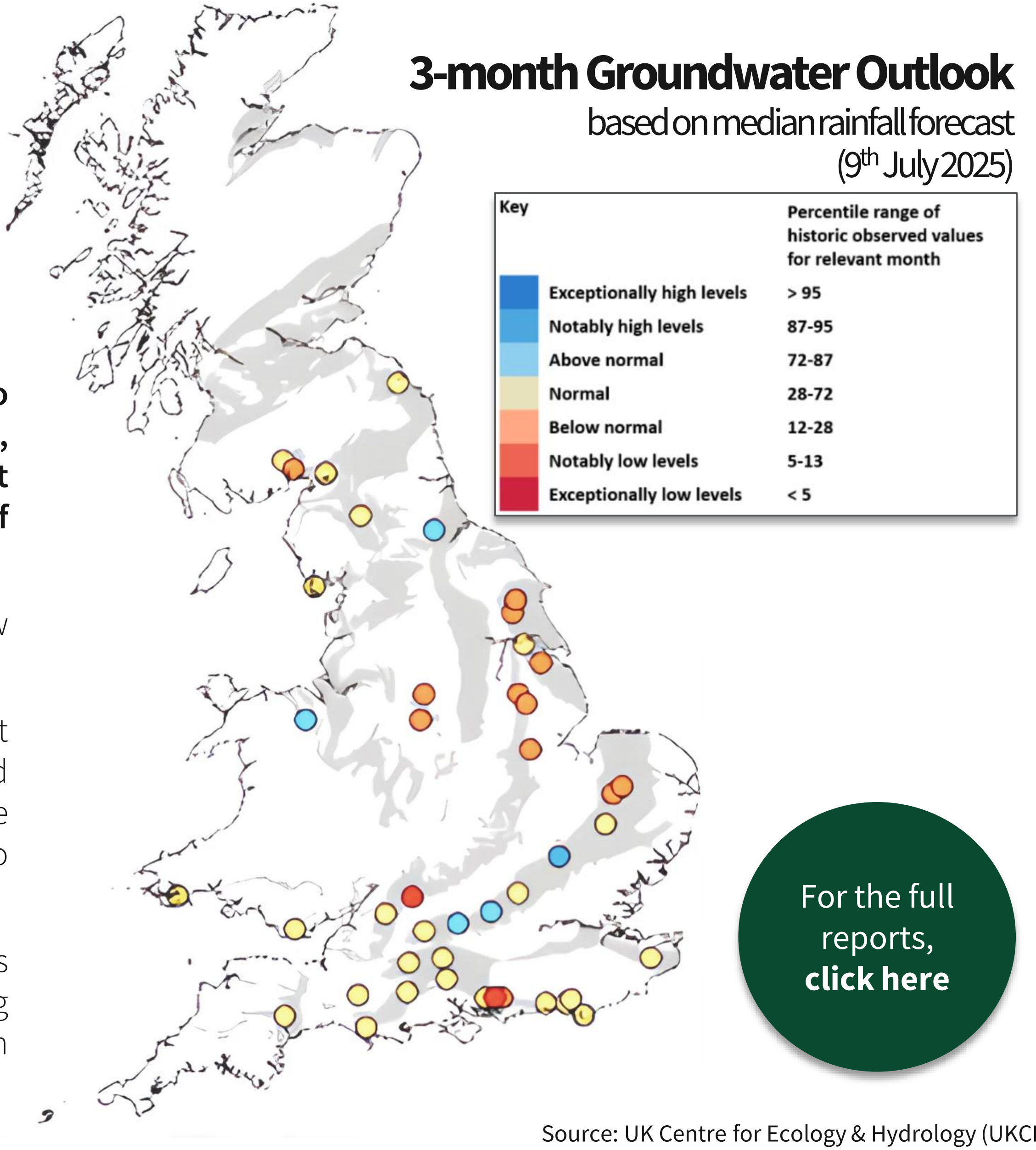
Forecast Groundwater Levels

Based on median rainfall forecasts, groundwater levels are projected to remain generally normal or below normal for the next 3 months. However, there are notably low levels of groundwater in the Thames Valley, whilst river flows are exceptionally low across the North-East and East of England.

Groundwater levels in the North of England range from above normal to below normal, whilst the South of England generally has normal groundwater levels.

Following the driest spring since records began, regions across the Northwest of England remain in drought, with the Midlands and North-East in prolonged dry weather. Lincolnshire, Northamptonshire, East Anglia, and possibly the Thames areas are expected by the Environment Agency (EA) to move into "prolonged dry weather" in the coming weeks.

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).



For the full reports, **click here**

Source: UK Centre for Ecology & Hydrology (UKCEH)

Current Reservoir Levels

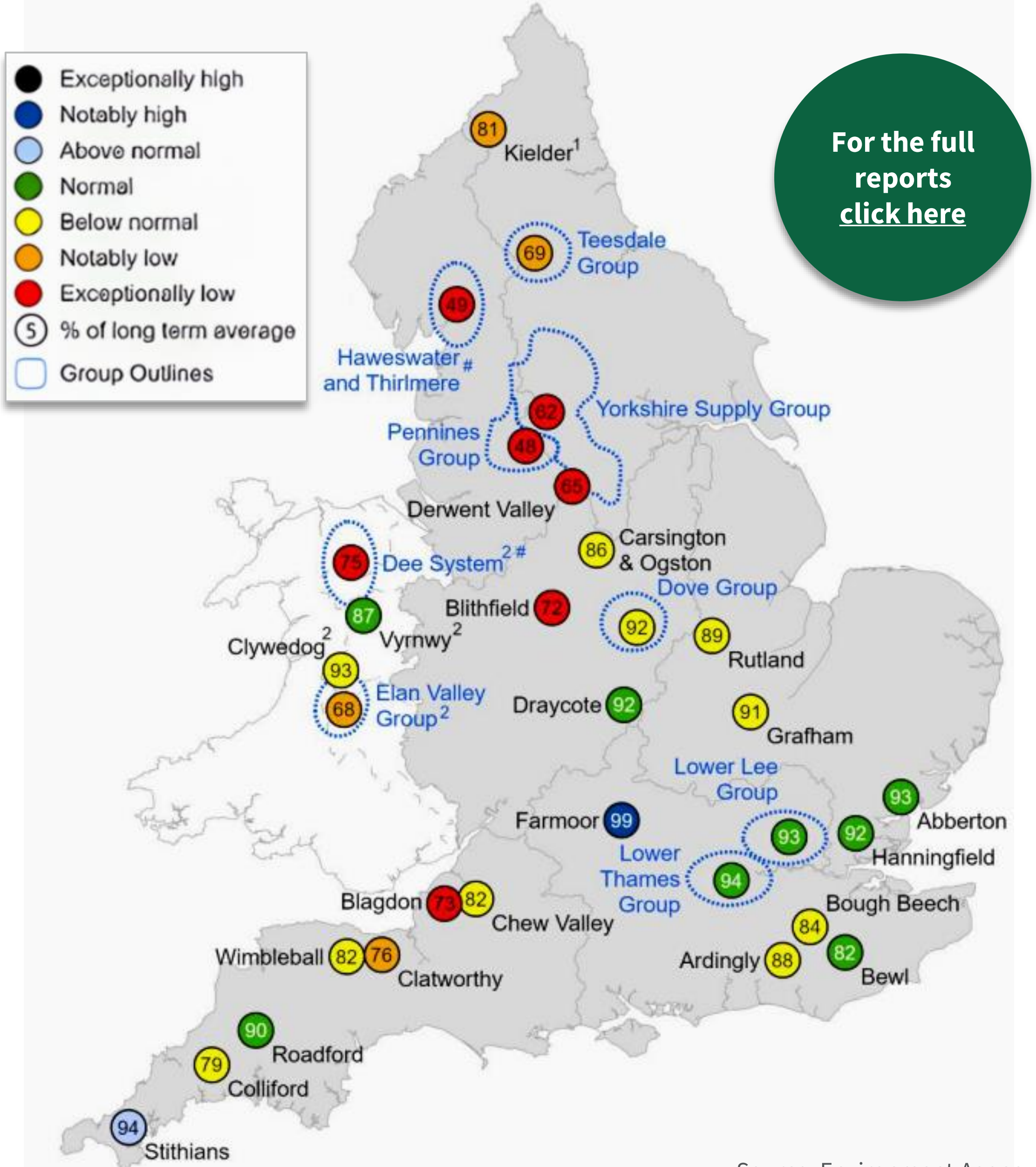
England and Wales; June 2025

As of 24th June 2025, England's average public water reservoir level was at 77% of capacity. However, reservoirs in the North-West are at historic lows for this time of the year, with Yorkshire Water having announced a hosepipe ban from July 11th onwards. South East Water have also announced a hosepipe ban from July 18th and Thames Water from 22nd July onwards. HTA continues to attend meetings of the National Drought group and monitor the situation closely.

The chart to the right shows the reservoir levels at a selection of sites across the UK at the end of May. Whilst reservoir levels in the Southeast and Southwest of England remain normal for the time of year, areas of Northwest England and North Wales have exceptionally low levels. Additionally, water consumption has widely been reported as being above average compared to previous years, increasing the likelihood that reservoirs will fall to below-normal levels.

The HTA continues to closely monitor the situation and attend meetings of the National Drought group. Resources for HTA members to provide to customers in the event of any restrictions are currently being produced. Members are encouraged to remain conscious of their water use, and can access the HTA's updates, advice and guidance for improving resilience **here**.

For the full reports click here



Source: Environment Agency

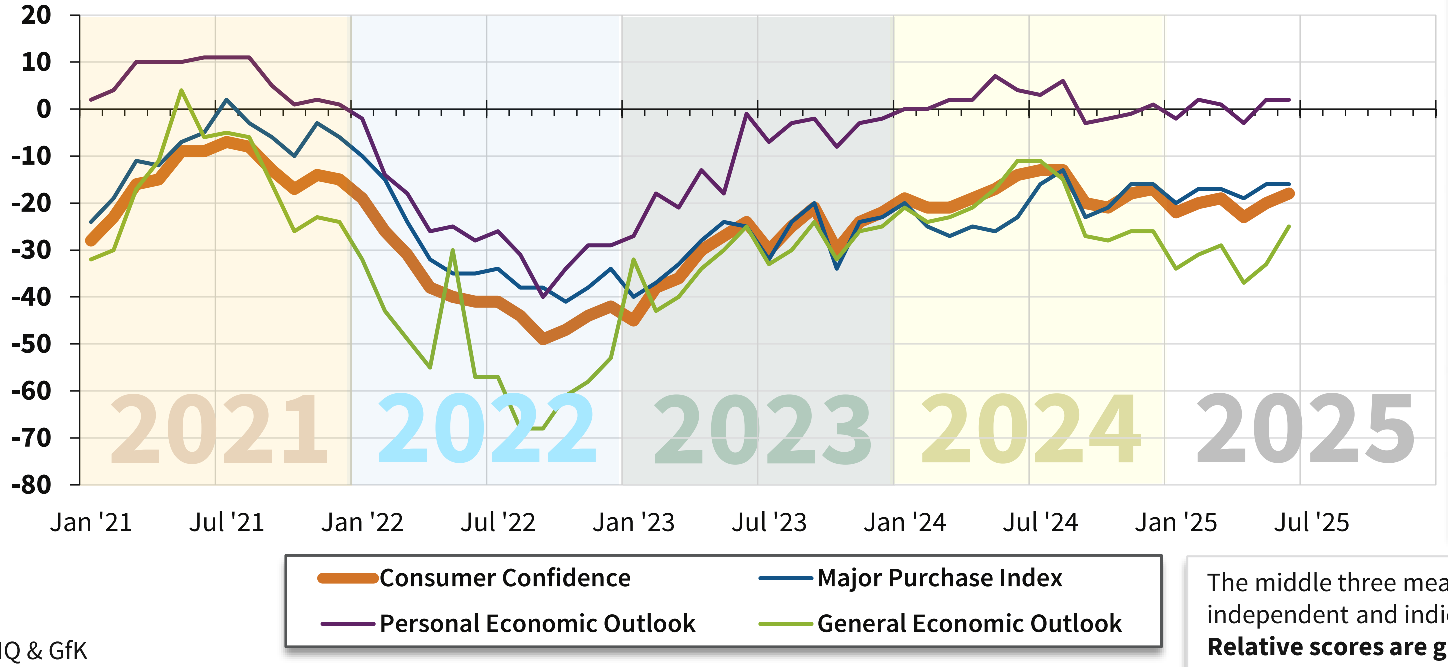
Consumer Confidence

June 2025 saw consumer confidence rose for the second consecutive month, with the overall score of -18 marking a new high for the whole of 2025. Despite this rise, consumer confidence remains cautious in historic terms.

The rise in consumer confidence is attributable to consumers' general economic outlooks (which measures consumers perception of the wider economy in general), which rose by 5 points compared to May 2025. Consumer perceptions of their personal economic outlook remained at 2, largely stable relative to May 2025.

The Major Purchase Index (MPI) was also stable from May 2025, remaining at its highest level across the whole of 2025.

Meanwhile, the savings index fell by 1 point from May 2025, and for the third consecutive month. This indicates that consumers feel as though saving their money is less worthwhile, likely driven by the market volatility in recent months.



Measure	Relative score (June 2025)	vs May 2025
Overall Consumer Confidence	**-18**	**▲ 2**
Personal financial outlook (next 12 months)	2	(=) 0
General economic outlook (next 12 months)	-25	▲ 5
Major Purchase Index	-16	(=) 0
Savings Index	*27*	▼ *1*

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.**

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

Inflation and Wages

The Consumer Prices Index (including housing costs; CPIH) inflation rate rose marginally to 4.1% in May 2025. Pay growth continues to track ahead of inflation, although the gap has narrowed in recent months.

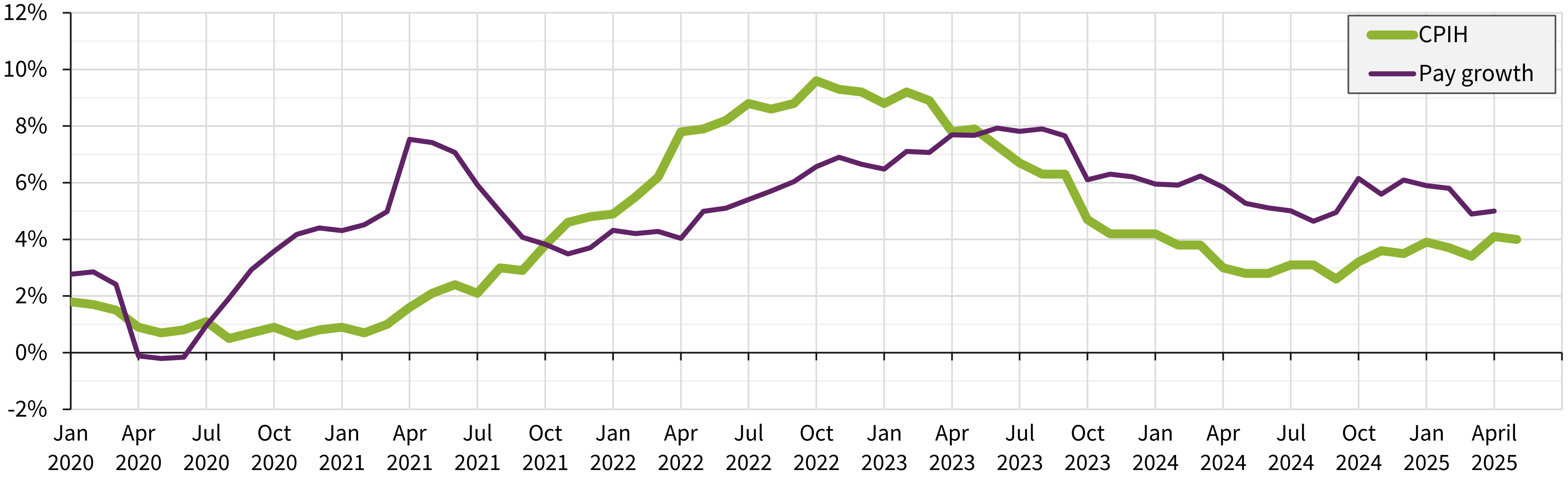
Average weekly earnings in April 2025 grew by 5.0% from April 2024, slightly ahead of April's CPIH inflation rate of 4.1%. Pay growth has outpaced inflation since May 2023 and continues to provide consumers with relief following the cost-of-living crisis.

Meanwhile, the unemployment rate for February-April 2025 remains largely stable at 4.6%, up by 0.1% on the previous period. This marks the new highest UK unemployment rate since August 2021, although it remains well within the 3-5% bounds that unemployment typically remains within.

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

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

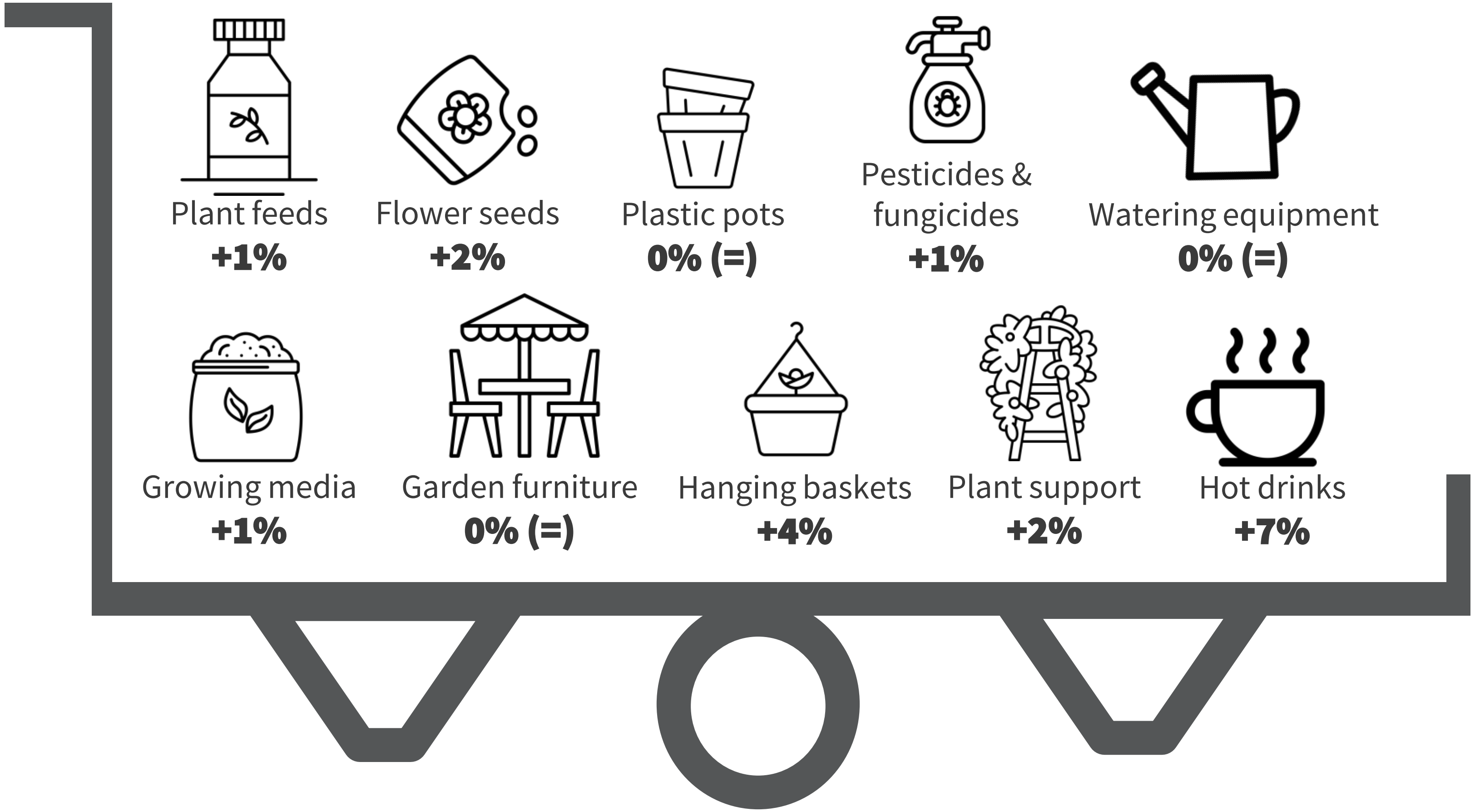
Unemployment Rate (Feb-Apr 2025) **= 4.6%**



Source: ONS

Retail Inflation

June 2025 v June 2024



Our analysis compares the prices of individual items purchased in garden centres between June 2025 and June 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 June 2025 basket, prices of garden centre goods generally remained well below the overall UK CPIH inflation rate of 4.1%.

Hot drinks experienced the highest levels of price inflation compared to June 2024 (+7%). Meanwhile, empty hanging basket prices rose by +4%, and flower seeds and plant support prices rose by +2%.

Prices of plastic pots, watering equipment, and bigger ticket garden furniture items all maintained prices on par with June 2024.

Source: HTA Garden Retail Monitor

Retail Inflation on Outdoor Plants

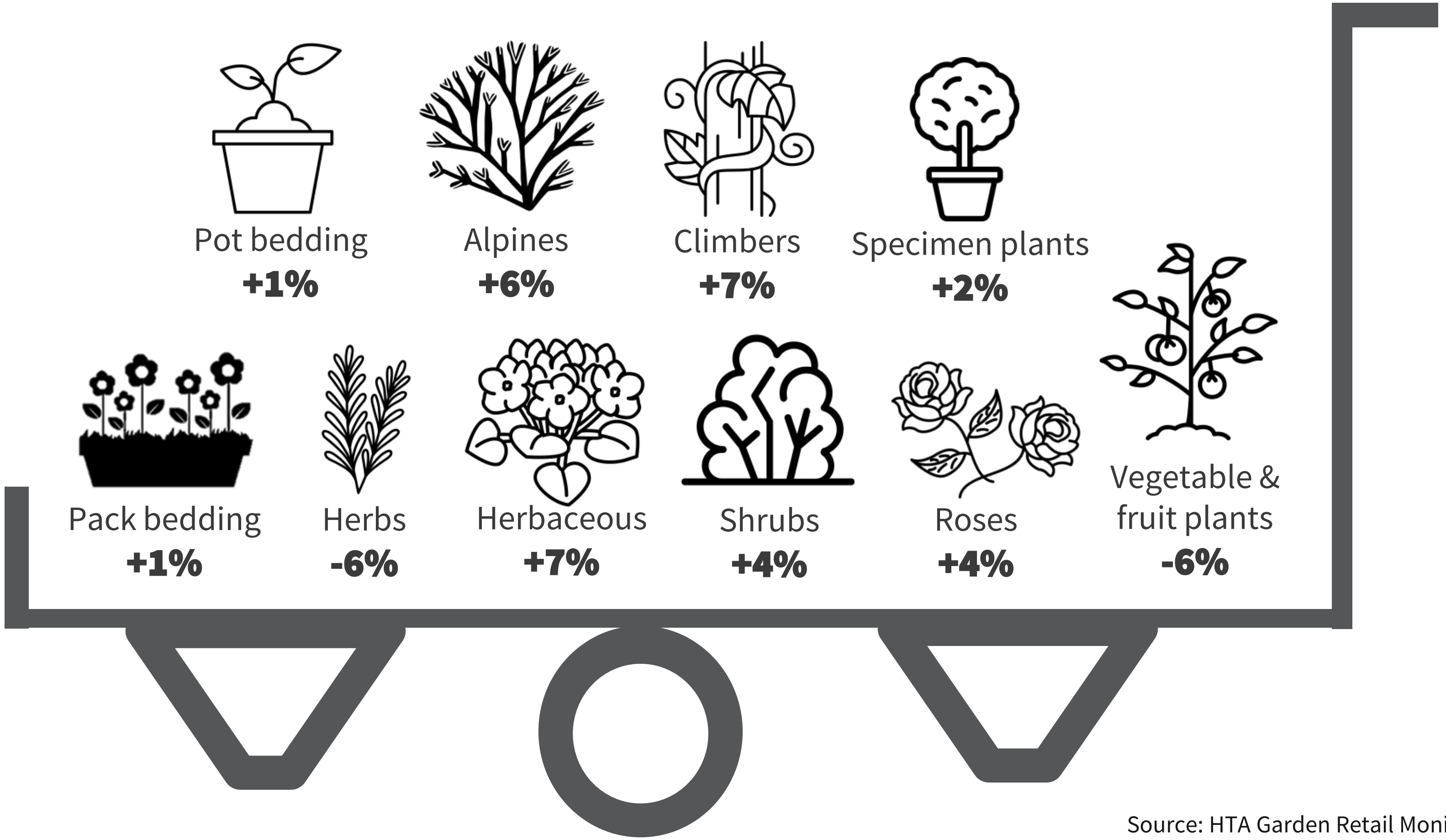
June 2025 v June 2024

We also look at retail price inflation across various plant categories within garden centres, comparing June 2025 to June 2024.

Herbaceous plants and climbers had the largest price rises, up +7% compared to last year, followed closely by alpines at +6%.

Roses and shrubs had price increases in line with the CPIH inflation rate, whilst bedding prices rose by a mere +1% from June 2024.

Conversely, ‘grow-your-own’ plants typically exhibited lower prices in June 2025 than in June 2024. Prices of both herbs and vegetable and fruit plants were down -6%. This may be a product of multi-buy offers or discounting, with many garden centres trying to shift the last of their Spring stock across these categories.



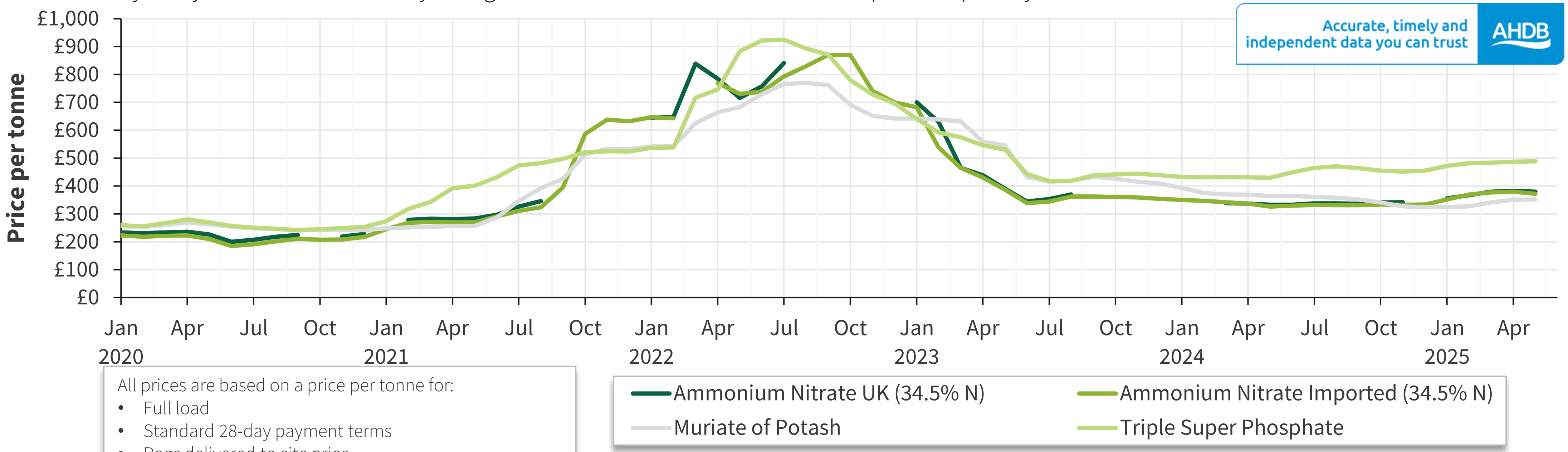
Source: HTA Garden Retail Monitor

UK Fertiliser Prices

UK fertiliser prices remained broadly stable in May 2025 relative to June 2025. Costs of ammonium nitrate are up around +13% compared to May 2024, and triple super phosphate prices are up around +8%.

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.

Although ammonium nitrate and triple super phosphate prices have risen notably in the last year, muriate of potash prices are down -4% compared to May 2024. With movements in price largely balanced out, overall fertiliser prices remain generally stable in the context of the past couple of years.



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 fell for a fourth consecutive week, as price volatility continues. The fall is attributed to the substantial decrease in US-bound cargo. Global supply chains continue to face considerable disruption over the everchanging status of US tariffs.

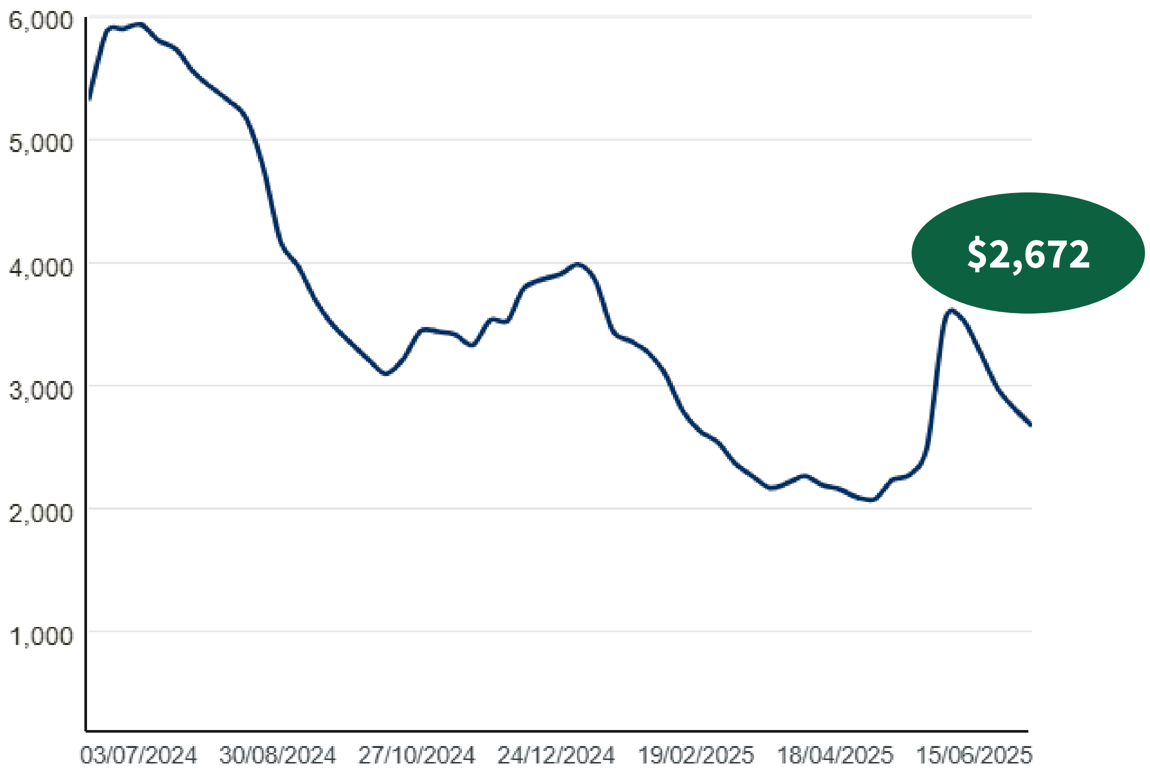
Each month, we report on a composite index which is an aggregate of major shipping costs across various routes. The Drewry World Container Index (WCI) was at \$2,672 per 40ft container as of July 10th, 2025.

Container prices have fluctuated wildly since the announcement of US tariffs in April 2025, and future volatility is expected. As things stand, prices are expected to continue falling in the short term, given the decline in US-bound cargo increasing overall capacity.

The US has issued another delay to the implementation of April's 'reciprocal' tariffs until August 1st. It remains unclear whether this deadline will be final or subject to further change.

Drewry World Container Index (WCI)

10th July 2025 (USD/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:

marketinfo@hta.org.uk

Horticultural Trades Association

Horticulture House

Chilton

Didcot

Oxfordshire

OX11 0RN