



Market Update

*August 2025*

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# Overview

- Garden centre sales showed steady growth in July 2025, with overall revenue up +4% compared to both July 2024 and July 2023. The increase in spend was driven by greater garden centre footfall compared to previous years, with average consumer spend broadly level on the last 2 years.
- Gardening product sales remained broadly stable, with revenue also rising +4% versus July 2024, although still down -1% from July 2023. Garden furniture was the main driver of growth, soaring +42% from July 2024. Meanwhile, outdoor plant sales struggled due to dry conditions and water restrictions in parts of the UK.
- Non-gardening departments continued their strong momentum throughout 2025. Sales increased by +7% compared to July 2024 and +11% versus July 2023. Indoor living and homewares posted the strongest gains. Catering sales also grew by +8%, with garden centre cafes and restaurants displaying strong growth year-on-year.
- Total transactions reached a three-year high for July, with transactions up +4% from 2024 and +2% from 2023. However, average spend remained steady at £26.37 (excluding VAT), indicating increased footfall rather than higher individual spending.
- July 2025 ranked as the UK's fifth-warmest July on record, with temperatures averaging 16.8°C. The prolonged dry and hot weather means that the Midland, Northwest, and Yorkshire regions remain in drought, and temporary use bans (TUBs) remain in place in Yorkshire, Kent & Sussex, Thames Valley, Hampshire, and the Isle of Wight. You can find the HTA's guidance on UK water restrictions [here](#).
- Consumer confidence dropped slightly by 1 point to -19 in July 2021, remaining broadly stable with recent months. A 7-point increase in the savings index indicates that consumers believe their spending power will constrict in the coming months. We've introduced a new page to Market Update that reviews changes in consumer spending, using card transaction data from Barclays. This allows us to benchmark garden centre sales against other retail sectors. You can find out more on Page 19.
- A steady month means that the average garden centre's year-to-date performance remains strong, with total revenues +10% ahead of both 2023 and 2024. Similar performance in the coming months will be required to maintain the current lead on previous years, with HTA's Q2 2025 Business Barometer also highlighting how profits are being squeezed by higher operating costs.

**Read on for all the detail...**

# Key Points


July 2025



Overall garden  
centre sales rose  
level by +4%  
from July 2024



July 2025 was  
the UK's fifth-  
hottest July on  
record



Consumer confidence  
remains cautious  
at -19 overall,  
down 1 pt from June 2025



Garden/Gardening  
sales also grew  
+4% compared to  
July 2024



Catering sales  
performed well,  
up +8% by value  
compared to  
July 2024



# Garden Centre Sales

## July 2025

**Overall, garden centre sales across the UK grew by 4% in July 2025 compared to the same month last year. Non-gardening products drove most of this growth, with sales jumping 9% from July 2024 (when catering is excluded).**

When we remove catering from the July 2025 figures, total sales were +5% greater than in July 2024, but only +1% greater than in July 2023.

Garden/gardening product sales stayed stable year-on-year. Total sales value increased by 4% compared to July 2024, though dropped 1% from July 2023. This marked a strong recovery after gardening sales fell in June, suggesting a recovery in consumer demand. However, July is a much smaller month for

gardening sales than in June, so the gains seen in July 2025 are not substantial enough to cover last month’s shortfall.

Meanwhile, non-gardening sales continued to outperform previous years, which has been the trend throughout 2025. Including catering, July 2025’s non-gardening sales were up +7% compared to July 2024, and up +11% compared to July 2023. When excluding catering, non-gardening sales were +9% higher in 2024, underlining the strength of performance in non-catering sales in July 2025. Indoor living sales were particularly strong, with the category up +17% compared to July 2024.

	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>
July 2025 vs July 2024	▲ 4%	▲ 5%	▲ 4%	▲ 7%	▲ 9%
July 2025 vs July 2023	▲ 4%	▲ 1%	▼ 1%	▲ 11%	▲ 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 Garden Retail Monitor, 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](https://hta.org.uk/grm)

Source: HTA Garden Retail Monitor

NB: Figures reported may vary month to month, due to changes in the makeup of the sample.  
HTA endeavours to adopt the most suitable approach that provides a robust assessment of the current market.

# Garden Centre Sales by Volume

## July 2025

Garden centre volumes rose +6% in July 2025 compared to the same period in 2024 and climbed +8% versus July 2023. This indicates that July 2025's growth came from customers buying a greater number of items, as opposed to being inflationary.

Excluding catering, total volumes also increased by +6% from July 2024 and by +3% against July 2023.

Gardening product volumes also exceeded both previous years in July 2025, despite the fall in sales value compared to July 2023. Volumes were up +3% compared to July 2024 and edged up +1% relative to July 2023.

Comparatively, non-gardening volumes significantly outpaced their sales by value. July 2025's volumes surged by +11% compared to July 2024, and +15% compared to July 2023.

As sales volumes tracked consistently above sales values, this points to strong trade at garden centres in July 2025. As detailed on pages 20 and 21, many garden centre products have seen price increases below the UK inflation rate, explaining why stronger volume performance has not translated into equivalent monetary gains.

	July 2025 vs July 2024		July 2025 vs July 2023	
	Sales Value (£, Exc. VAT)	Sales Volume (n)	Sales Value (£, Exc. VAT)	Sales Volume (n)
<b>Overall</b> <i>Incl. catering</i>	▲ 4%	▲ 6%	▲ 4%	▲ 8%
<b>Overall</b> <i>Excl. catering</i>	▲ 5%	▲ 6%	▲ 1%	▲ 3%
<b>Garden/ gardening</b>	▲ 4%	▲ 3%	▼ 1%	▲ 1%
<b>Non-garden/ gardening</b> <i>Incl. catering</i>	▲ 7%	▲ 11%	▲ 11%	▲ 15%
<b>Non-garden/ gardening</b> <i>Excl. catering</i>	▲ 9%	▲ 10%	▲ 5%	▲ 7%

Sources: HTA Garden Retail Monitor

# Average Transaction Values (ATVs) and Transaction Numbers

In the garden store; July 2025

Garden centres recorded a three-year high in total transactions for the month of July in 2025. Customer transactions grew +4% from July 2024, and +2% from July 2023. At the same time, the average spend per customer remained stable to July’s in previous years.

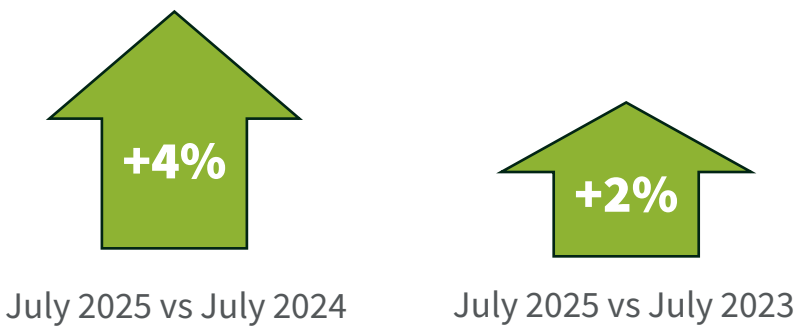
The rise in total transactions indicates an increase in garden centre footfall on previous years, aligning with the volume increases shown on page 6.

However, while more people visited and bought more items, individual

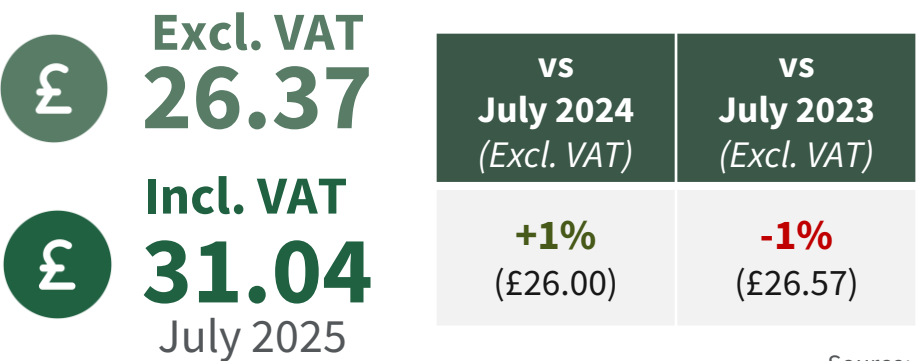
spending levels stayed consistent with past years. July 2025's average transaction value (ATV) of £26.37 sits between July 2024 and July 2023 figures within just 1%.

This reinforces the pattern of increased customer footfall rather than higher individual spending, as overall revenue grew despite the average transaction value remaining stable. Given the +42% increase in high-ticket garden furniture sales, consumer spending on other products must have decreased for July 2025's ATV to remain flat on previous years.

## Transaction Numbers (Garden Store):



## Average Transaction Values (ATVs) (Garden Store):



Source: HTA Garden Retail Monitor

# Average Transaction Values (ATVs) and Transaction Numbers

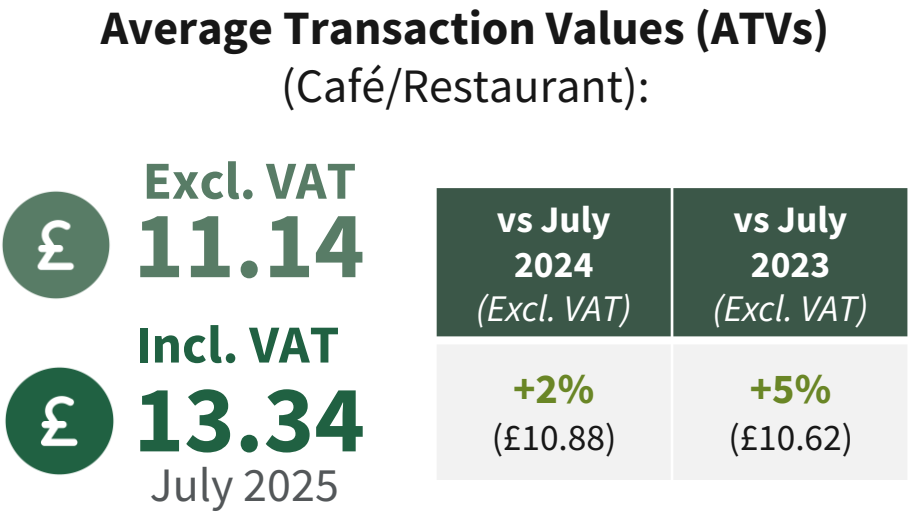
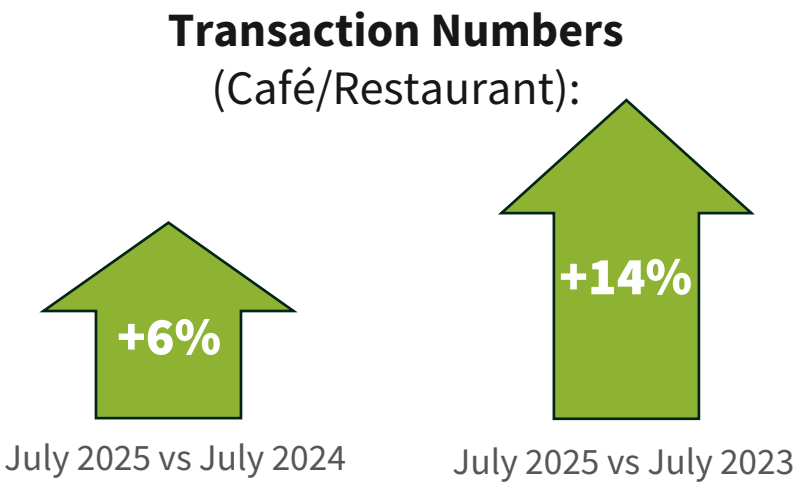
In the café/restaurant; July 2025

Café and restaurant transactions in garden centres maintained positive momentum in July 2025, with a total increase of +6% from July 2024 and +14% from July 2023. The amount spent per visit also reached higher levels than previous years, though this likely reflects price inflation.

The growth in café transactions continues the trend seen throughout garden centre catering this year. It is likely that the increase in garden

centre footfall noted on Page 7 helped support the rise in transactions.

However, customers appeared cautious with their café spending. Although average spend rose to a three-year high, food and drink prices have risen faster than other garden centre items. For instance, hot drink prices increased by +8% on average between July 2024 and July 2025. This suggests that people were more selective about what they ordered, although the increase in visitors led to an increase in catering revenue.



Source: HTA Garden Retail Monitor



# Gardening Products

## Sales by value; July 2025

Garden/gardening product sales rose +4% from July 2024, but dropped -1% from July 2023. Sales growth compared to the year before was mainly driven by outdoor furniture purchases, which soared +42% from a comparatively weak July 2024. All garden categories remain ahead by value compared to the year-to-end of July 2024, following strong spring trading.

Both outdoor plant categories struggled in July 2025 compared to recent years. Hardy plants revenue fell -1% while bedding revenue declined by -4% against July 2024. The hot, dry weather and implementation of water restrictions across parts of the UK likely contributed to this downturn. However, year-to-date plant sales remain strong.

Conversely, outdoor furniture sales rose by +42% compared to the previous year. On average, 10% of annual outdoor furniture sales occur in July, making it the joint-fourth most important month for outdoor furniture sales. This rise saw outdoor living increase its share of July's total turnover from 9% last year to 11% this year. However, this only represents a 5% gain versus July 2023, and outdoor livings share of turnover was 11% in July 2023, indicating a recovery to typical levels.

Garden tools and outdoor features & structures were the next best performers in July 2025, when compared to July 2024's figures. Revenue from tools sales rose +8% whilst outdoor structures sales rose by +9% from July 2024. This likely reflects customers focusing on permanent garden investments during dry weather conditions, as plant care became more challenging.

Category	July 2025 vs 2024	July 2025 v 2024 YTD	July 2025 vs 2023
Bedding & other plants	▼ 4%	▲ 11%	▼ 6%
Hardy plants, shrubs & trees	▼ 1%	▲ 6%	▼ 12%
Indoor plants	▲ 2%	▲ 2%	▼ 14%
Seeds (excl. grass seed)	▲ 6%	▲ 6%	▲ 3%
Plant care products	▼ 5%	▲ 10%	▲ 1%
Garden tools & equipment	▲ 8%	▲ 15%	▲ 15%
Outdoor containers	▼ 4%	▲ 7%	▼ 2%
Garden sundries	▼ 5%	▲ 4%	▼ 10%
Garden features & structures	▲ 9%	▲ 17%	▲ 14%
BBQs and Heating	▼ 2%	▲ 12%	▲ 27%
Garden Furniture	▲ 42%	▲ 16%	▲ 5%

Source: HTA Garden Retail Monitor

# Non-Gardening Products

## Sales by value; July 2025

**Non-gardening sales increased by +7% compared to July 2024, and +11% relative to July 2024. Like June 2025, most non-gardening categories outperformed previous years by a notable margin, although wild bird supplies continued selling poorly below 2024 levels for the fourth month running.**

Restaurant and café sales grew steadily July 2025, with revenue up +8% from July 2024 and up +20% from July 2023. As noted on page 8, this growth was driven primarily by a higher number of visitors, with price rises also a factor.

Indoor living and homeware sales saw the largest growth of any non-gardening category relative to July 2024, although sales fell -2% between July 2023 and July 2025. This indicates that the +17% increase seen this year likely marks a bounce back to typical levels. Food and farm shop products continued to perform well in July 2025, up +9% compared to 2024 and +22% versus 2023.

Wild bird care purchases continued to remain low in July 2025, falling -6% from July 2024 and -15% from July 2023. This leaves wild bird care as the only category trading below 2024 levels across the full year, with the year-to-end of July figure sitting at -5%. Sales volumes for wild bird care are down similar levels, indicating that this fall is not a product of multi-buys or discounting.

Category	July 2025 vs 2024	July 2025 vs 2024 YTD	July 2025 vs 2023
Indoor living & homewares	▲ 17%	▲ 6%	▼ 2%
Gifting	▲ 9%	▲ 6%	▲ 5%
Wild bird care	▼ 6%	▼ 5%	▼ 15%
Pets	▲ 3%	▲ 5%	▼ 8%
Food & farm shop	▲ 9%	▲ 15%	▲ 22%
Catering	▲ 8%	▲ 10%	▲ 20%

Source: HTA Garden Retail Monitor

# Category Shares by Value

July 2023-2025

Since the start of this year, we started reporting the proportion of monthly revenue each garden centre department generates, looking back over the last 3 years. These percentages help contextualise the change in sales discussed in previous sections and show any recent shifts in customer purchasing behaviour in the last 2 years.

Non-garden departments have grown faster than gardening departments, due to dry weather and water restrictions putting consumers off purchasing live plants. Consequently, the live plants, bulbs, and seeds category now accounts for 3% less of July 2025's total turnover than in July 2023. Live plants remain the largest contributor to overall July turnover by a substantial margin, and their declining share reflects other categories experiencing greater sales increases.

Catering remains the second largest category in July garden centre sales, representing 14% of monthly turnover. Meanwhile, outdoor living returned to being the third-largest category following the surge in garden furniture sales noted on page 9, following weak sales in July 2024.

Overall, most other garden centre categories maintained a similar proportion of July's total turnover relative to the past 2 years. The decline in live plants' share of total turnover came mainly at the expense of outdoor living and homewares.

Category	July 2025	July 2024	July 2023
Live plants, bulbs, & seeds	25%	27%	28%
Catering	14%	14%	13%
Outdoor living	11%	9%	11%
Garden care & maintenance	10%	11%	10%
Garden containers & structures	9%	10%	9%
Other non-garden products	7%	7%	7%
Homewares & floristry	6%	5%	6%
Food hall & farm shop	5%	5%	5%
Gifting	5%	5%	5%
Wild bird care, pets, & aquatics	4%	4%	5%
Other garden products	2%	2%	2%
Miscellaneous	1%	0%	0%

Source: HTA Garden Retail Monitor

# Year-to-Date Sales

Calendar year to July 2025

**Looking at the full year through to end of July 2025, total garden centre sales sit +10% higher than for the same period in 2023 and 2024. The strong spring sales continue to give garden centres a substantial lead over previous years' performance.**

Removing catering from the analysis, garden centre sales still lead 2024 by +10% and 2023 by +6% for the year to end of July. Garden product sales were +10% ahead for the equivalent period in 2024, and +4% above 2023, having been the main beneficiary of the good weather throughout spring.

The continued strong performance of non-gardening departments is

reflected in the year-to-date position. Through July 2025, non-gardening products generated +9% more revenue than in 2024 and +18% more than in 2023. When catering is excluded, non-gardening sales were +8% ahead of 2024 and +11% ahead of 2023.

While weaker sales in June 2025 narrowed the year-to-date positions somewhat, July 2025's steady growth has strengthened garden centres' sales positions compared to previous years, with HTA's Q2 2025 Business Barometer showing that the average retailer was 4% ahead of their budgeted sales position at the end of June 2025.

	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 July 2025 vs YTD July 2024	▲ 10%	▲ 10%	▲ 10%	▲ 9%	▲ 8%
YTD July 2025 vs YTD July 2023	▲ 10%	▲ 6%	▲ 4%	▲ 18%	▲ 11%

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

**How are these figures calculated?**

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Source: HTA Garden Retail Monitor

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# National Weather

## July 2025 v July 2024





**July 2025 ranked as the UK’s fifth-warmest July on record. Compared with 2024, July 2025 was slightly sunnier and drier, though the total rainfall was around average in historic terms.**

The average temperature in July 2025 was 16.8°C (including overnight temperatures), up +2°C from July 2024’s average. The UK also enjoyed more hours of sunshine in July 2025 versus July 2024, with 183.4 hours recorded. This exceeded the average amount of July sunshine historically.

With dry conditions persisting throughout July 2025, total rainfall dropped by 13% from July 2024, from 84.8mm to 74.2mm. The total number of rain days also declined in July 2025, from 12.5 to 11.2. While July 2025 was not abnormally dry, substantially more rainfall remains needed to improve the UK’s water situation.

The prolonged dry and hot weather continues to put pressure on the UK’s water industry, with the Midlands, Northwest, and Yorkshire regions currently in drought. 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.

	July 2025	July 2024
 Mean temperature (°C)	16.8	14.8
 Hours of sunshine	183.4	154.9
 Total Rainfall (mm)	74.2	84.8
 No. of rain days (>1mm/day)	11.2	12.5

Source: MET Office



# Regional Weather

July 2025



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

In July 2025, the South of England posted the warmest temperatures in the UK at 18.6°C on average, 1.8°C above the national average. Scotland recorded the coolest average temperature at 14.9°C, with the remaining regions experiencing temperatures around the national average.

The South of England also claimed the sunniest conditions in July 2025, with 220.9 hours of sunshine received, closely followed by Wales. Northern Ireland was notably cloudy, getting nearly 24 hours less sunshine than Scotland

The cloudy weather in Northern Ireland meant the country experienced the most rain days of any region. However, Scotland’s total rainfall was highest in July 2025, recording 102.9mm across the month.

Region	Mean Temp (°C)	Hours of sunshine	Rainfall (mm)	Rain days (>1mm/day)
Overall	16.8	183.4	74.2	11.2
Scotland	14.9	150.9	102.9	12.7
Northern Ireland	16.0	132.5	79.9	13.2
North England	16.8	177.5	77.3	11.3
South England	18.6	220.9	49.2	9.3
Wales	16.5	198.3	58.3	11.3

Source: MET Office

# Water Availability

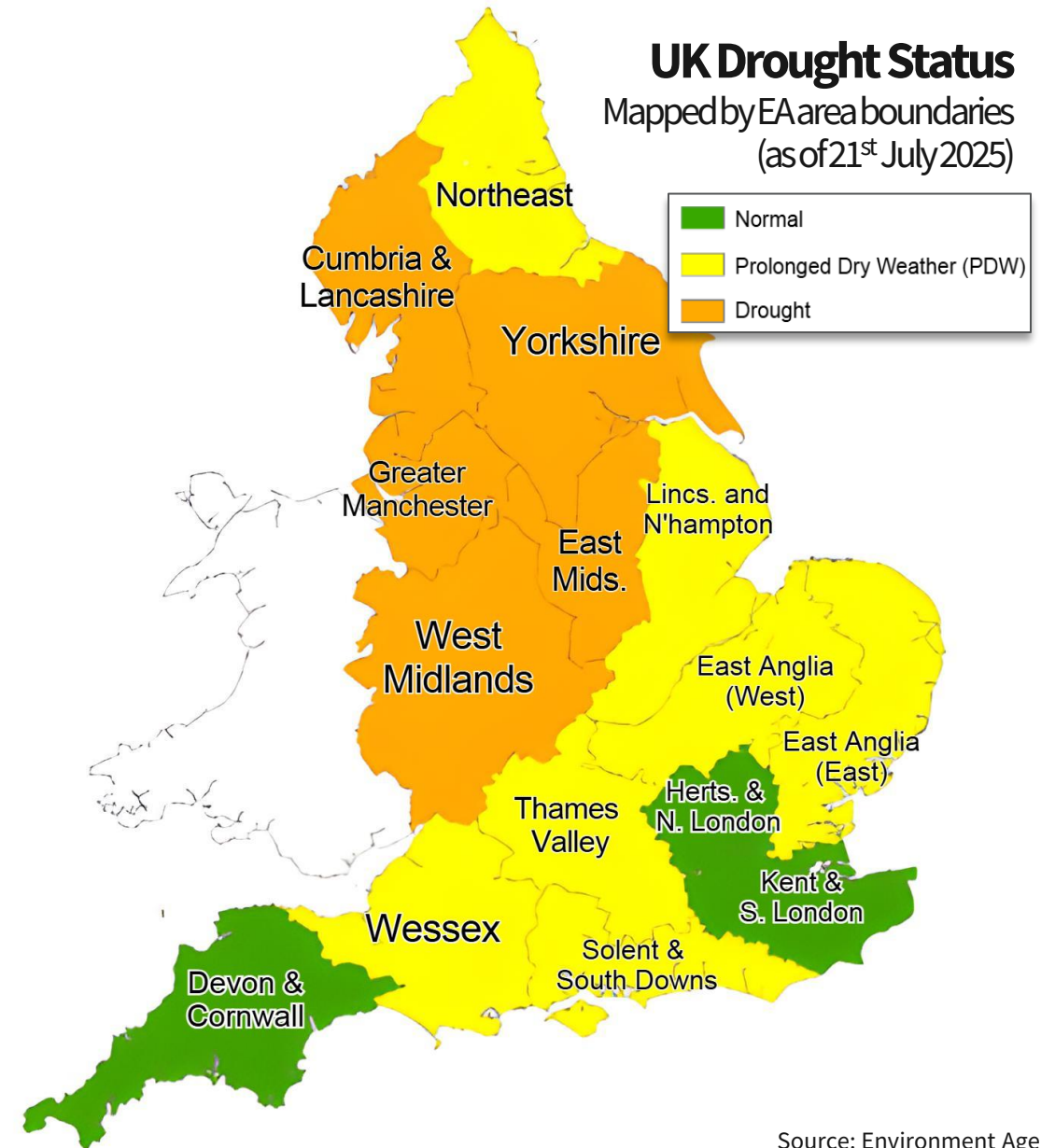
## England; July 2025

**Currently, the majority of England faces either in prolonged dry weather (PDW) or drought conditions. The Environmental Agency has sought voluntary abstraction reductions in some areas and warns that continued dry weather may lead to further restrictions.**

Continuing from last month, the Northwest, Yorkshire, and Midlands regions remain in drought. The end of July brought the driest week since mid-May, leaving all bar one river site classified as being normal or lower for this time of year. Around half (49%) of all rivers are below normal levels of flow.

Continued dry weather has prompted the implementation of 780 'hands-off' flow restrictions for abstractors, with 130 of these introduced in the last week of July. Some abstractors in East Anglia have been contacted and asked for voluntary abstraction reductions due to exceptionally low surface water.

Forecasts suggest the next 3 months will be warmer than average, with an increased likelihood of more heatwaves, raising the likelihood of further abstraction restrictions. 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 risk of water use restrictions (more on page 16).



Source: Environment Agency

# Reservoir Levels

England and Wales; July 2025

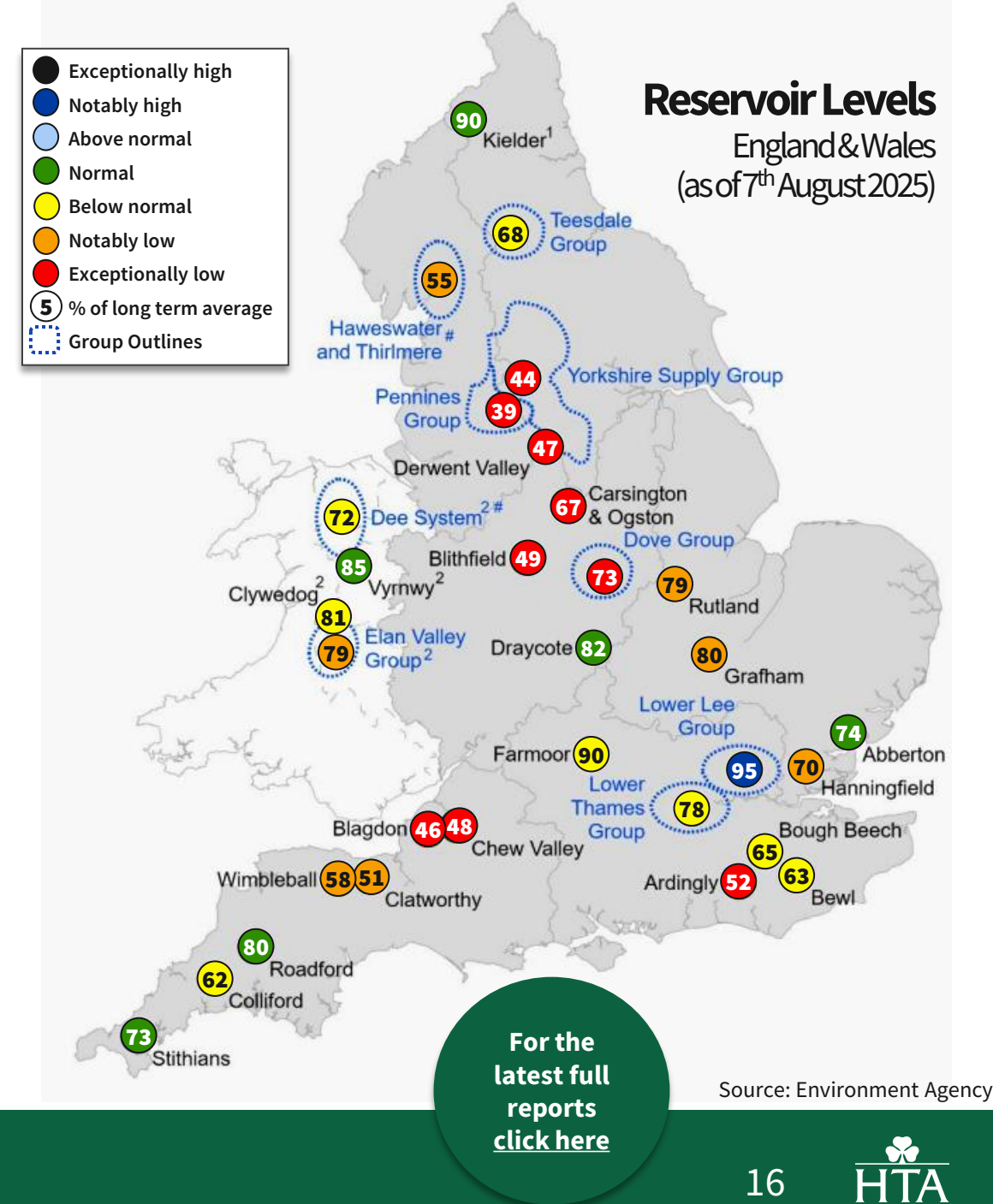
Between 24<sup>th</sup> July 2025 and 5<sup>th</sup> August 2025, England's average public water reservoir level dropped from 77% of capacity to 67.7% of capacity. Several reservoirs are now at historic lows for this time of year, with Yorkshire Water reservoirs at 44% and the Pennines group at 39% of capacity as of August 7<sup>th</sup>.

Several water companies have already implemented temporary use bans (TUBs), in Yorkshire, the Thames Valley, in the South and the South-East. These will likely remain in place for the foreseeable future.

The Environmental Agency has also raised concerns regarding Severn Trent and South Staffordshire Water's reservoir supplies, and cautions that the possibility of use restrictions remains under review in these areas.

The HTA continues to closely monitor the situation and attend meetings of the National Drought group. New [HTA guidance and resources](#) for customers are available to members.

Members are encouraged to remain conscious of their water use, and can access the HTA's updates, advice and guidance for improving resilience [here](#).



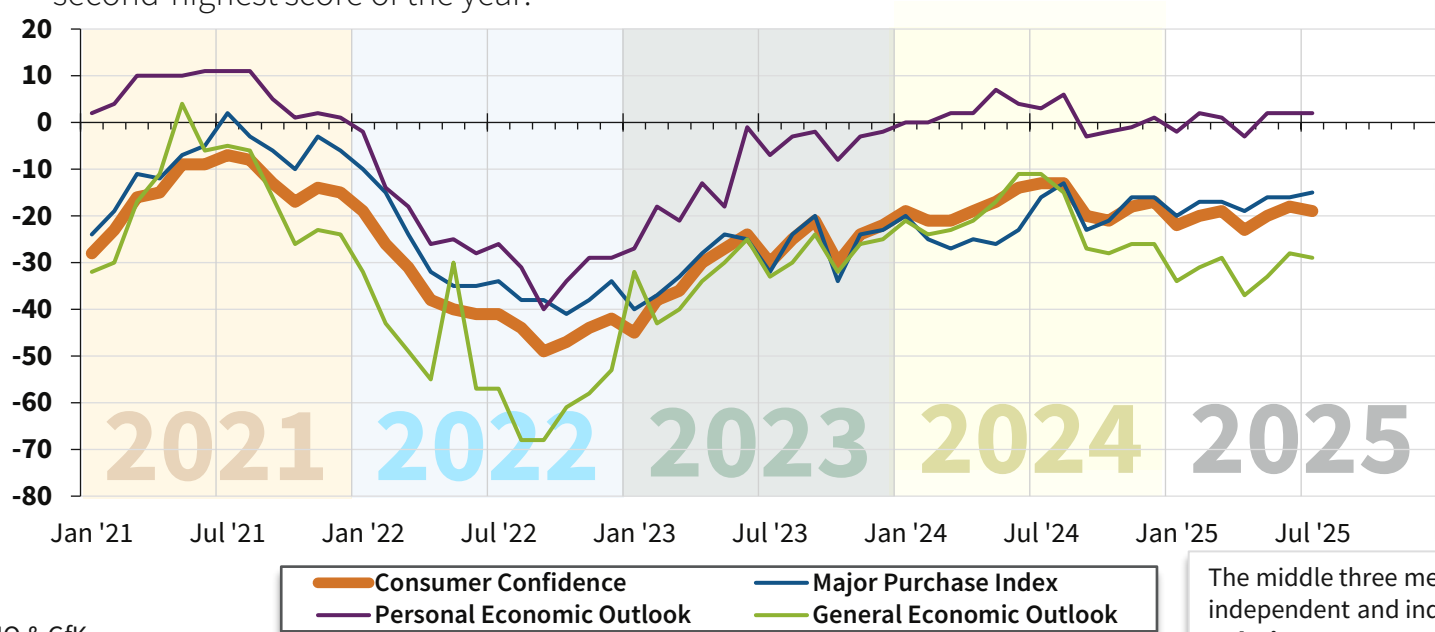
# Consumer Confidence

Overall consumer confidence dropped 1 point to -19 in July 2025, following the highest score of the year in June. The Savings Index rose considerably, up by 7 points, with consumers thinking that now is a good time to save.

The score for consumers' personal financial outlook has held stable at 2 points overall since May 2025. Consumers' general economic outlooks suffered a 3-point decline, down to -28 overall. However, this has remained broadly stable since Autumn 2024, with this fall still marking the second-highest score of the year.

The Major Purchase Index (MPI) gained 1 point from June 2025, reaching a new high since August 2024 and the second-highest score since the start of the cost-of-living crisis. However, the Savings Index also climbed 7 points from the previous month in July 2025, up to its highest level since 2007, with consumers anticipating tax rises in the Autumn Budget.

Overall, while most measures remain stable on previous months, the rise in the savings index indicates that consumers anticipate that their budgets will become tighter in future months.



Measure	Relative score (July 2025)	vs June 2025
Overall Consumer Confidence	-19	▼ 1
Personal financial outlook (next 12 months)	2	(=) 0
General economic outlook (next 12 months)	-28	▼ 3
Major Purchase Index	-15	▲ 1
Savings Index	27	▲ 7

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 July 1<sup>st</sup> – July 14<sup>th</sup> 2025.

# Consumer Spending

## Looking back at June 2025

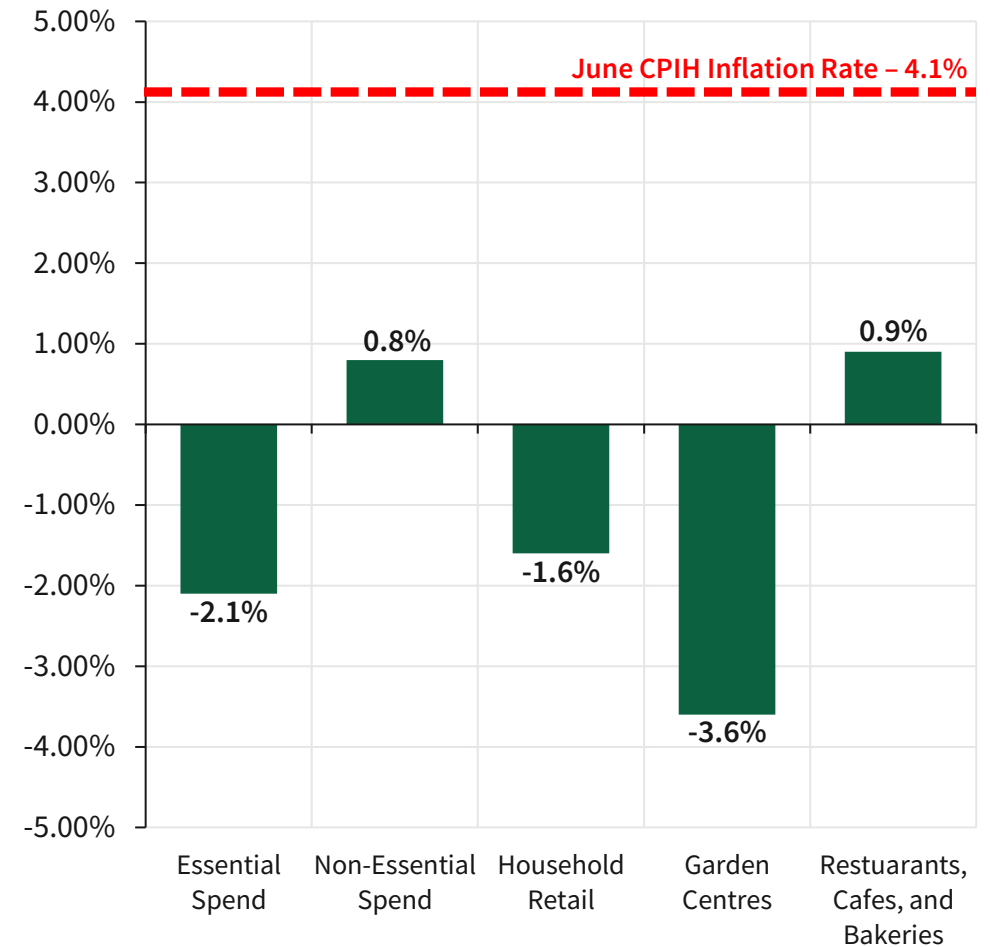
In this edition of Market Update, we're reporting on Barclays' card transaction data, to benchmark the sales performance of garden centres against other retail sectors, as well as giving a view on how consumer spending is changing. In June 2025, consumer spend on essentials declined -2.1% compared to the previous year. In contrast, consumer expenditure on non-essentials increased by only 0.8% year-on-year.

Spending that was considered 'essential' includes groceries, childcare, healthcare, insurance, fuel, and public transport. Non-essential spending covers all other purchases.

Consumer spending was cautious in June 2025, with both essential spend and non-essential spend declining in real terms relative to CPIH inflation. Card spend on essentials was particularly limited, with grocery spending dropping by -0.4% as consumers controlled their budgets more tightly.

In June 2025, overall spend on household retail fell by -1.6% compared to June 2024. Garden centres performed worse than this average, with total spend by card down -3.6%. Garden goods, in particular plants, have been more heavily impacted by the weather than other retail channels. By comparison, in our July edition of Market Update, we also reported that overall garden centre revenue fell -4% year-on-year by value.

The warm weather in June failed to provide the typical spending boost for UK retailers, and consumer spend on eating and drinking was also heavily restricted. Spend on restaurants, cafes, and bakeries rose by 0.9% from June 2024, also marking a fall in real terms, with the heat driving some consumers away from eating out.



Source: Barclays Consumer Spending Report – June 2025



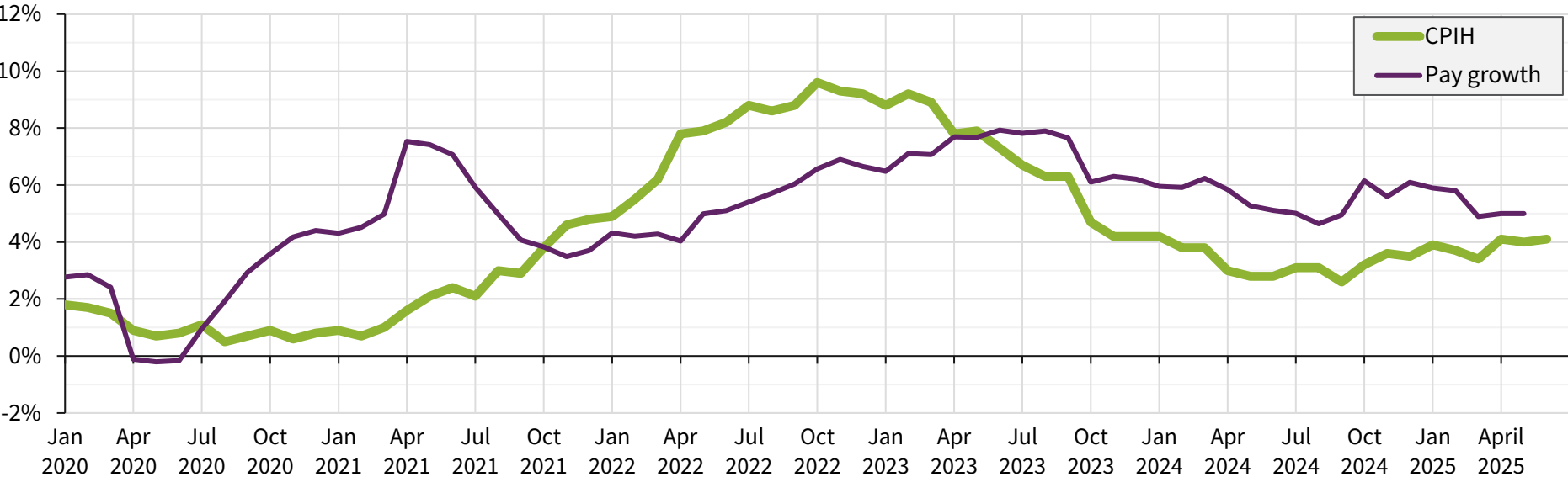
# Inflation and Wages

**The Consumer Prices Index (including Housing costs; CPIH) inflation rate increased by 0.1 to 4.1% in June 2025. Pay growth has continued to outpace inflation, though the margin of difference has tightened.**

Average weekly earnings in May 2025 rose by 5.0% from April 2024, slightly above June's CPIH inflation rate of 4.1%. Average pay growth has exceeded inflation since June 2023, though the two measures have been within 1% of each other

for the past two months. Inflation surpassing pay growth would create strain on consumers finances, as their spending power decreases.

Meanwhile, the unemployment rate for March-May 2025 stayed largely stable at 4.7%, gaining +0.1% from the previous period. Unemployment levels remain well within normal bounds but are up 0.3% compared to the same period in 2024.



CPIH  
inflation  
(June  
2025)  
= 4.1%

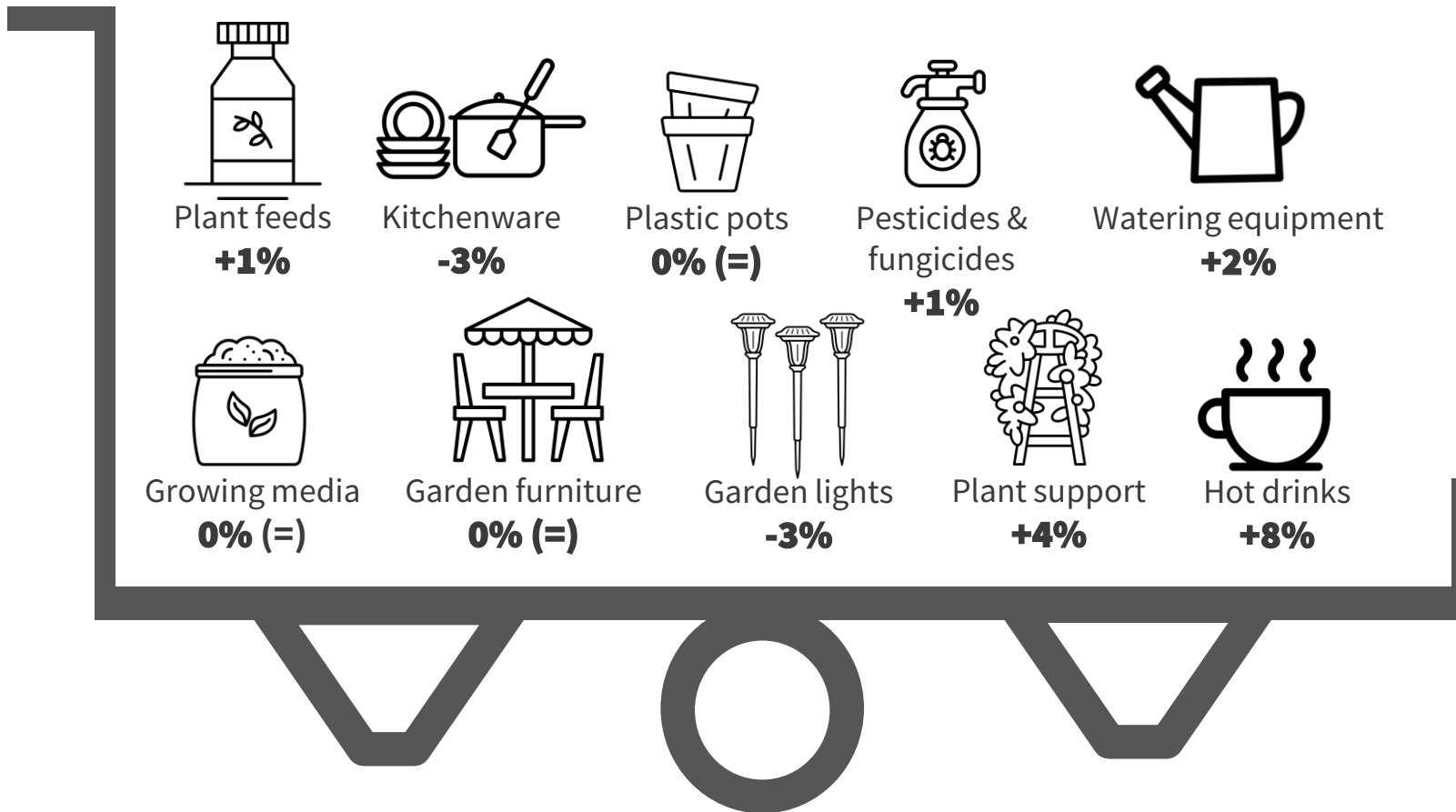
Average Weekly  
Earnings: Regular  
pay growth  
(May 2025)  
= 5.0%

Unemployment  
Rate  
(Mar-May 2025)  
= 4.7%

Source: ONS

# Retail Inflation

July 2025 v July 2024



Our analysis compares the prices of individual items purchased in garden centres between July 2025 and July 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 July 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 July 2024 (+8%). Plant support prices rose by +4%, tracking in line with UK CPIH inflation. Meanwhile, prices of pesticides, watering equipment, and plant feeds rose slightly, tracking below inflation.

Several categories exhibited negligible inflation year-on-year, including growing media, plastic pots, and garden furniture.

Source: HTA Garden Retail Monitor

# Retail Inflation on Outdoor Plants

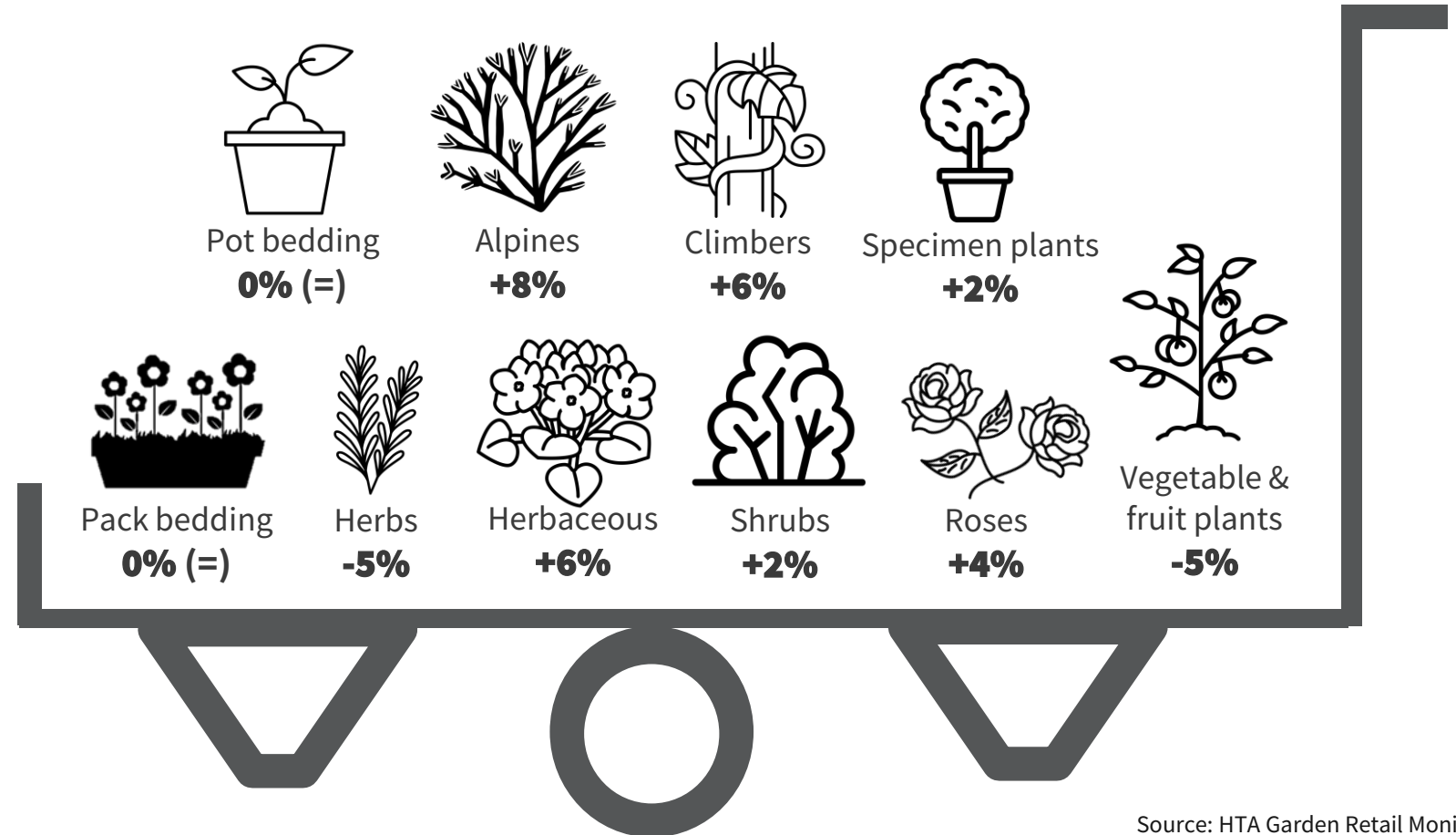
July 2025 v July 2024

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

Herbaceous plants, climbers, and alpines continue to display price rises above inflation for a consecutive month, with alpine prices rising by +8% year-on-year.

Both pack bedding and pot bedding prices remain stable on last year, although this is likely a product of multi-buy offers bringing down the average unit price.

Moreover, herb, fruit and vegetable plant prices remain lower than last year, down -5% on average. Similar to bedding, this is likely a result of multi-buy offers, as well as discounting as the core growing season comes to the end.



Source: HTA Garden Retail Monitor

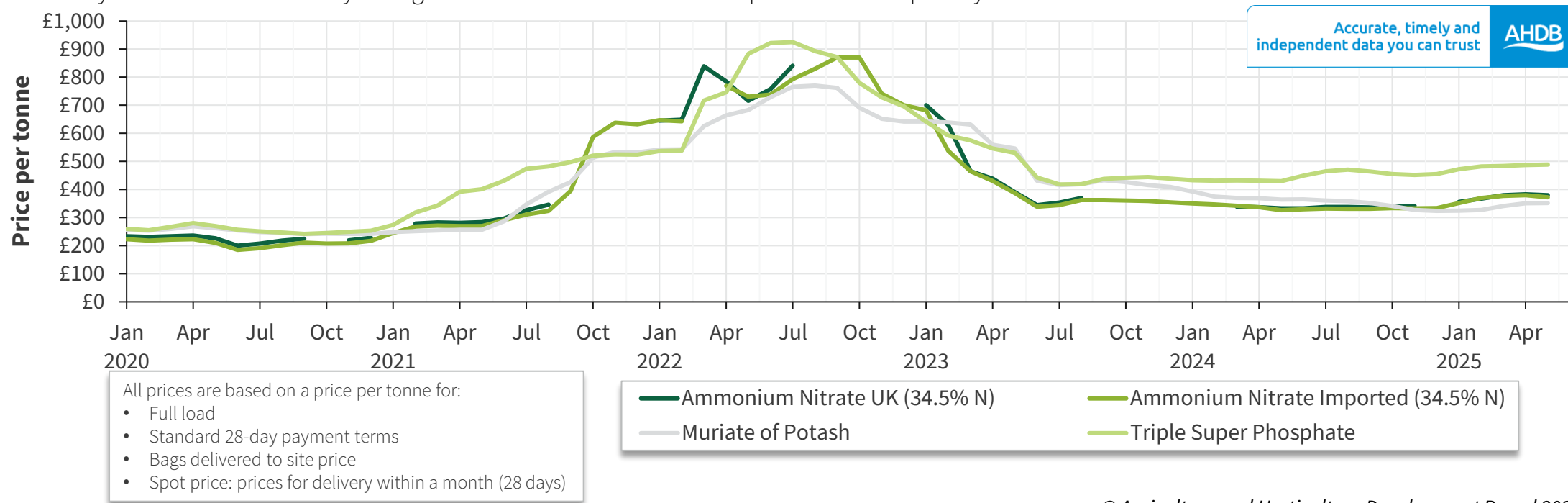
# UK Fertiliser Prices

**In June 2025, UK fertiliser prices remained broadly stable relative to the previous year. Costs of ammonium nitrate were up around +13% compared to June 2024, and triple super phosphate prices were up around +8%.**

Each month, we report the latest prices of a selection of fertiliser components. Whilst not a complete list of those used by the industry, they are indicative of any rising fertiliser costs that could squeeze

margins throughout the supply chain. Since we reported fertiliser prices in July, no new data has yet been published by the AHDB.

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



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# Shipping Container Prices

Drewry's World Container Index (WCI) of shipping container prices continues to stabilise following a volatile period. Drewry's forecast expects demand to weaken over the next quarter and for rates to decline further. However, this remains subject to the implementation of any future 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 \$2,424 per 40ft container as of August 7<sup>th</sup>, 2025.

Container prices have fluctuated wildly since the announcement of US tariffs in April 2025, with rates spiking through May-June before declining rapidly throughout July. The fall in rates has now slowed, with the most recent weekly change being a fall of -3%.

Annually, Drewry's composite index shows container prices as having declined by -56% from the start of the year. This change is mostly a product of American tariffs, which have now come into effect as of August 1<sup>st</sup>, 2025. The likelihood of further amendments to American tariffs and further volatility to container prices remains high.

## Drewry World Container Index (WCI)

7<sup>th</sup> August 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:



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