Make-up of Garden Centre Turnover

Market Insights

May 2025

Introduction

The proportion of garden centre turnover made up by different product categories varies substantially throughout the year. Although garden products are key for garden centres, lower demand outside of the core gardening season requires most garden centres to diversify the products they sell to maintain cash flow.

This output takes an in-depth look at the annual and monthly turnover shares held by different product categories within the garden centre, using data collected via HTA's Garden Retail Monitor.

Garden Centre annual turnover shares by product category

Over the course of a full year, live plants, bulbs, and seeds make up 24% of annual garden centre turnover on average. The second-largest category by turnover is Catering, accounting for 17% on average from 2022 to 2024. This underlines how garden centre cafes and restaurants have increasingly become an important revenue source for many garden centres, increasing from 15% of total sales in 2022, to 19% in 2024.

However, as many garden centres do not have a café or restaurant on-site, **Table 1 presents the average annual turnover shares, both when catering sales are excluded.**

Garden centre turnover composition remains largely stable year-on-year, but garden furniture's share has significantly declined—dropping from 11% in 2022 (when it was the third-largest category) to just 6% in 2024.

HTA's annual consumer survey reveals that the Internet held the largest share for purchases of garden furniture in 2023, capturing 45% of sales by value, compared to garden centres' 21% share. This online competition likely contributes to garden centres' declining furniture sales. Additionally, the COVID-19 pandemic accelerated furniture replacement cycles as consumers upgraded their outdoor spaces during lockdowns, resulting in reduced demand in subsequent years.

Product category	3-year average	3-year average (excluding catering)	2022	2023	2024
Live plants, bulbs, & seeds	24%	28%	23%	24%	23%
Catering	17%	-	15%	17%	19%
Other non-garden products	10%	12%	10%	10%	11%
Outdoor living & furniture	9%	11%	11%	9%	6%
Garden maintenance & care	8%	9%	8%	8%	7%
Homewares & floristry	7%	8%	7%	7%	7%
Garden containers & structures	6%	7%	7%	6%	6%
Food hall & farm shop	6%	7%	5%	6%	6%
Christmas	6%	7%	6%	6%	6%
Gifting	5%	5%	4%	5%	5%
Wild bird care, pets and aquatics	3%	3%	3%	3%	3%
Other garden products	2%	2%	2%	2%	2%

Table 1: Annual turnover shares by product category (3-year average and by year, from 2022 to 2024)

Share of monthly turnover by category

The monthly turnover share by category fluctuates month to month, as seasonality affects demand. Live plants, bulbs, and seeds hold the greatest monthly turnover share in May (38% of May's turnover; see Figure 1 and Table 2).

Other gardening categories, such as garden maintenance, outdoor living, and outdoor containers follow the trend of live plants, with all these categories' shares diminishing throughout the Autumn.

Categories such as catering, indoor living, and non-garden products typically generate a constant share of total turnover throughout the year. Wild bird care also retains a constant share of annual turnover, albeit typically taking up the largest turnover share in January.

Christmas products typically hold the largest share relative to other categories in November and December, with clearance sales providing around 5% of January's total turnover as well. Other categories which take up a greater share of monthly turnover in the festive season include food and farm shop and gifting.

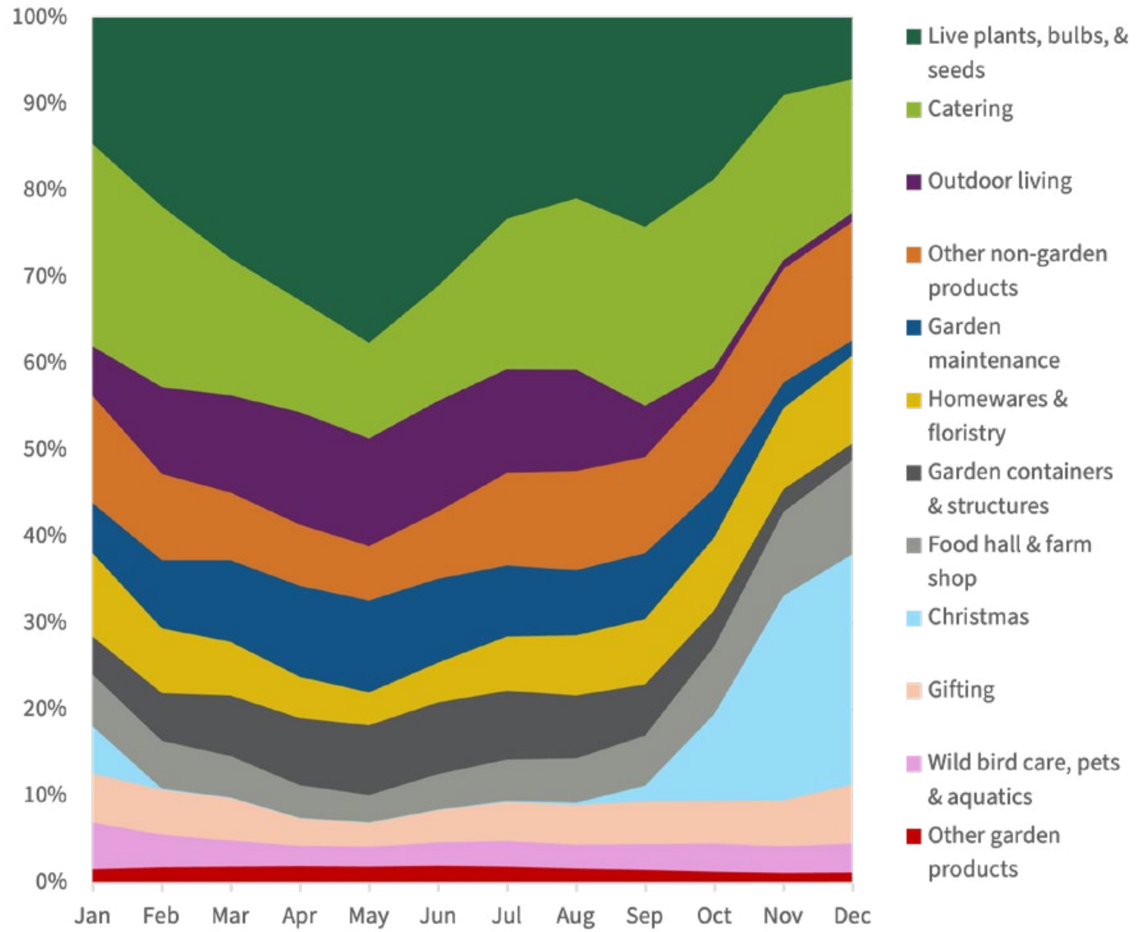

Figure 1: Monthly turnover shares in garden centres by product category, averaged over a 3-year period (2022-2024)

Share of monthly turnover by category

	Proportion of month's turnover by product category											
Product Category	**Jan**	**Feb**	**Mar**	**Apr**	**May**	**Jun**	**Jul**	**Aug**	**Sep**	**Oct**	**Nov**	**Dec**
Catering	**23%**	21%	16%	13%	11%	13%	17%	20%	21%	**22%**	19%	15%
Christmas	5%	0%	0%	0%	0%	0%	0%	0%	2%	10%	**24%**	**27%**
Food hall and farm shop	6%	5%	5%	4%	3%	4%	5%	5%	6%	8%	10%	11%
Garden containers and structures	4%	6%	7%	8%	8%	8%	8%	7%	6%	4%	3%	2%
Garden maintenance	6%	8%	9%	11%	11%	10%	8%	8%	8%	6%	3%	2%
Gifting	6%	5%	5%	3%	3%	4%	5%	5%	5%	5%	5%	7%
Homewares, cut flowers and floristry	10%	7%	6%	5%	4%	5%	6%	7%	8%	8%	9%	10%
Live plants, bulbs and seeds	15%	**22%**	**28%**	**33%**	**38%**	**31%**	**23%**	**21%**	**24%**	19%	9%	7%
Other garden products	2%	2%	2%	2%	2%	2%	2%	2%	1%	1%	1%	1%
Other non-garden products	12%	10%	8%	7%	6%	8%	11%	11%	11%	12%	13%	14%
Outdoor living	6%	10%	11%	13%	12%	13%	12%	12%	6%	2%	1%	1%
Wild bird care, pets and aquatics	5%	4%	3%	2%	2%	3%	3%	3%	3%	3%	3%	3%

Table 2: Monthly turnover share by garden centre product category, averaged over a 3-year period (2022-2024)

References

HTA Garden Retail Monitor