



Market Update

*September 2025*

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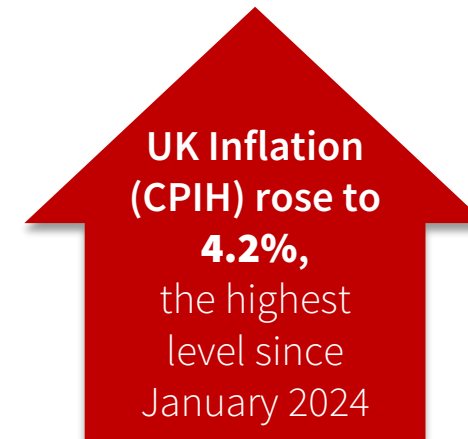
# Overview

- August 2025 was a moderately positive month for garden centres, with overall sales rising +3% from August 2024 and +12% from August 2023. Following the strong start to the year, garden centre sales in the summer months have slowed down slightly, although continue to move in a positive direction.
- When taking sales volumes into account, it appears that sales increases were driven by inflation rather than increased purchase volumes, which were flat between August 2025 and August 2024. Total transactions in August 2025 were also level with August 2024.
- Gardening sales were on-par with overall sales increases, with a rise of +3% from August 2024 and +13% from August 2023. Among live plants, some showed significant price inflation, whilst others exhibited price deflation as a result of multi-buy offers and seasonal discounting.
- Average consumer spend rose by +4% in the garden store, and by +3% in garden centre cafes, between August 2024 and 2025. However, as previously highlighted, these increases were mostly a consequence of inflation as opposed to larger basket sizes. As consumers bought similar quantities to last year, price rises appear to have had a limited effect on individual purchasing behaviour.
- August's weather was incredibly mixed, with storms sandwiching a heatwave in the middle of the month. This led to considerable regional variation in weather, with England experiencing one of its driest Augusts since records began.
- Groundwater levels in the UK remain typically low, with public reservoirs continuing to diminish. No new temporary use bans have been implemented, although Yorkshire Water are pursuing further drought permits following exceptionally low reservoir levels. You can find the HTA's guidance on UK water restrictions [here](#).
- UK consumer confidence recovered by +2pts in August 2025, following the Bank of England's cut to interest rates. However, confidence continues to remain historically low, as global trade remains volatile and consumers await potential tax rises in the Autumn Budget.
- In summary, August was largely a positive month for garden centres, with slight sales growth helping to continue the strong lead in year-to-date sales that was generated throughout the spring. Weaker sales growth throughout the summer months has narrowed the gap slightly, although overall sales were still +9% ahead of 2024 for the year-to-end of August.

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

# Key Points

August 2025



# Garden Centre Sales

## August 2025

**Garden centre sales in August 2025 rose by +3% from August 2024 and by +12% from August 2023. Sales growth was broadly balanced across gardening and non-gardening departments.**

When catering is excluded, August 2025 garden centre sales were +3% ahead of August 2024, and +12% above of August 2023. Catering’s growth in August 2025 was notably slower than previous months, although still posted positive gains (see page 10).

Sales of gardening products grew slightly in August 2025, increasing by +3% from August 2024 and +13% from August 2023. August is a relatively small

month for gardening sales, although live plants still make up the largest portion of monthly sales (see page 11). Within gardening departments, bulbs and garden furniture sales saw the largest percentage increases year on year (see page 9).

Non-gardening sales also grew steadily, up +4% between August 2025 and August 2024 when including catering. Compared to August 2023, non-gardening sales rose by +12%. Monthly non-gardening sales have shown steady monthly growth throughout the whole of 2025 relative to 2024, and this trend continued into August.

|                                  | Overall<br><i>Incl. catering</i> | Overall<br><i>excl. catering</i> | Garden/<br>Gardening | Non-garden<br>/gardening<br><i>Incl. catering</i> | Non-garden<br>/gardening<br><i>Excl. catering</i> |
|----------------------------------|----------------------------------|----------------------------------|----------------------|---|---|
| August 2025<br>vs<br>August 2024 | ▲ 3%                             | ▲ 3%                             | ▲ 3%                 | ▲ 4%  | ▲ 3%  |
| August 2025<br>vs<br>August 2023 | ▲ 12%                            | ▲ 12%                            | ▲ 13%                | ▲ 12%   | ▲ 8%  |

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

### How were 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, please visit:  
[hta.org.uk/grm/](https://hta.org.uk/grm/)

Source: HTA Garden Retail Monitor



# Garden Centre Sales by Volume

## August 2025

Across garden centre departments in August 2025, volumes were broadly level with August 2024. This means that growth in sales value was mainly a result of inflation, as opposed to an increase in consumer purchasing.

Among gardening products, sales volumes were flat between August 2025 and August 2024. Our analysis of price inflation on garden plants (see page 21) highlights the significant extent of price inflation on alpiners, conifers, herbaceous and climbers. Some plant subcategories saw average prices fall from last year, however, this was likely a result of seasonal stock being heavily discounted before the start of Autumn.

Non-gardening sales by volume in August 2025 were also level with August 2024, although when excluding catering volumes were down -1% for the same period. Again, the difference between value and volume measures is mostly attributed to inflation – for example, the average price of hot drinks in garden centre cafes has risen by +9% in the last 12 months.

Overall, it is apparent that garden centre prices appear to have risen across the board over the last 12 months. This comes as no surprise, as garden centres seek to maintain their profit margins in light of higher business costs and economic uncertainty.

|   | August 2025 vs August 2024   |                     | August 2025 vs August 2023   |                     |
|---|------------------------------|---------------------|------------------------------|---------------------|
|   | Sales Value<br>(£, Exc. VAT) | Sales Volume<br>(n) | Sales Value<br>(£, Exc. VAT) | Sales Volume<br>(n) |
| <b>Overall</b><br><i>Incl. catering</i>                   | ▲ 3%                         | = 0%                | ▲ 12%                        | ▲ 6%                |
| <b>Overall</b><br><i>Excl. catering</i>                   | ▲ 3%                         | = 0%                | ▲ 12%                        | ▲ 4%                |
| <b>Garden/<br/>gardening</b>                              | ▲ 3%                         | = 0%                | ▲ 13%                        | ▲ 6%                |
| <b>Non-garden/<br/>gardening</b><br><i>Incl. catering</i> | ▲ 4%                         | = 0%                | ▲ 12%                        | ▲ 8%                |
| <b>Non-garden/<br/>gardening</b><br><i>Excl. catering</i> | ▲ 3%                         | ▼ 1%                | ▲ 8%                         | ▲ 5%                |

Sources: HTA Garden Retail Monitor

# Average Transaction Values (ATVs) and Transaction Numbers

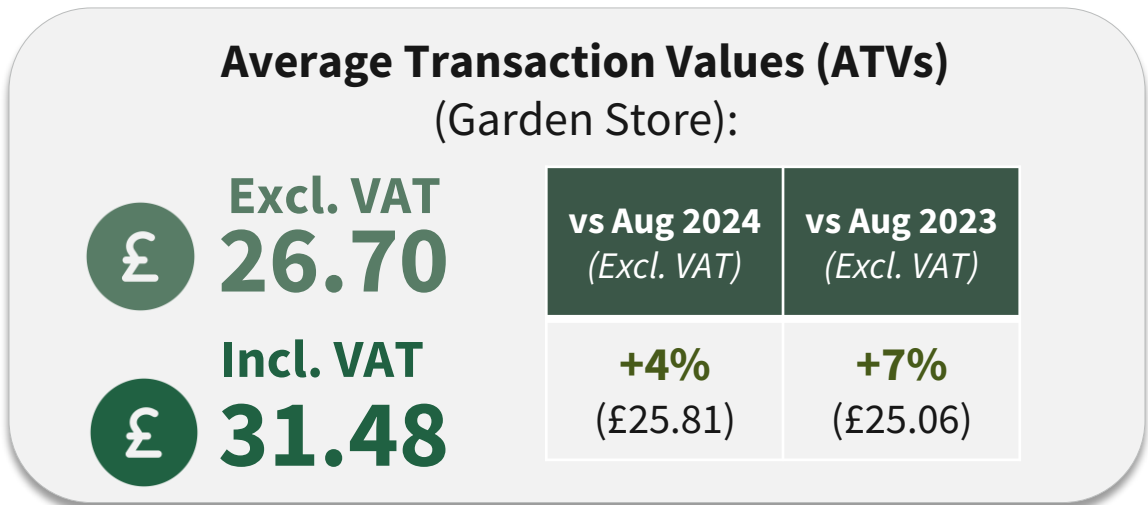
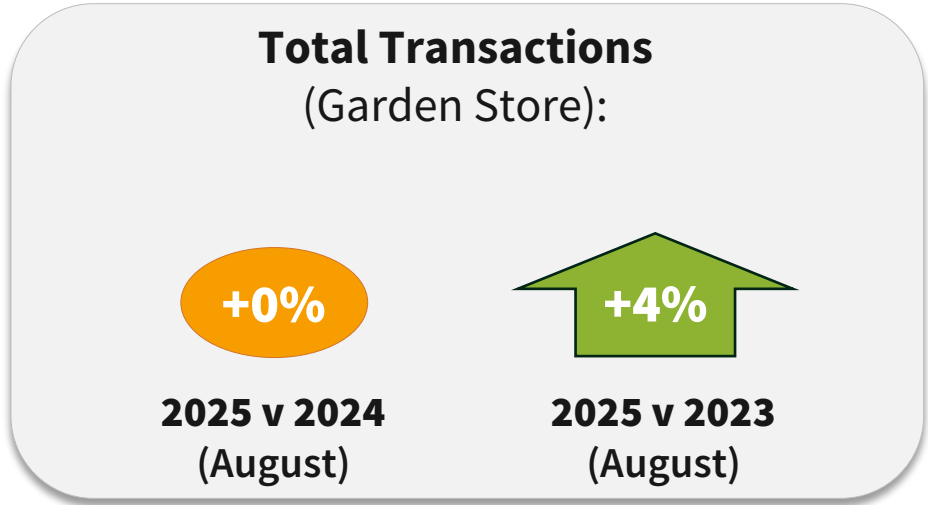
## Garden Store; August 2025

In August 2025, total garden centre transactions were level with August 2024, and up +4% from August 2023. Average consumer spend was also greater than in previous years, although this was a product of inflation rather than larger basket sizes.

Total transactions were flat between August 2025 and 2024, on par with the change seen in sales volumes. This underlines the fact that footfall and

basket sizes in August 2025 were broadly the same as last year.

Customers' average spend (excluding VAT) did increase from previous years (£26.65), up +2% from August 2024 (£25.94) and up +5% from August 2023 (£25.30). In tandem with the sales volumes, this suggests that consumers' volume of purchasing was generally unaffected by any price increases.



Source: HTA Garden Retail Monitor

# Average Transaction Values (ATVs) and Transaction Numbers

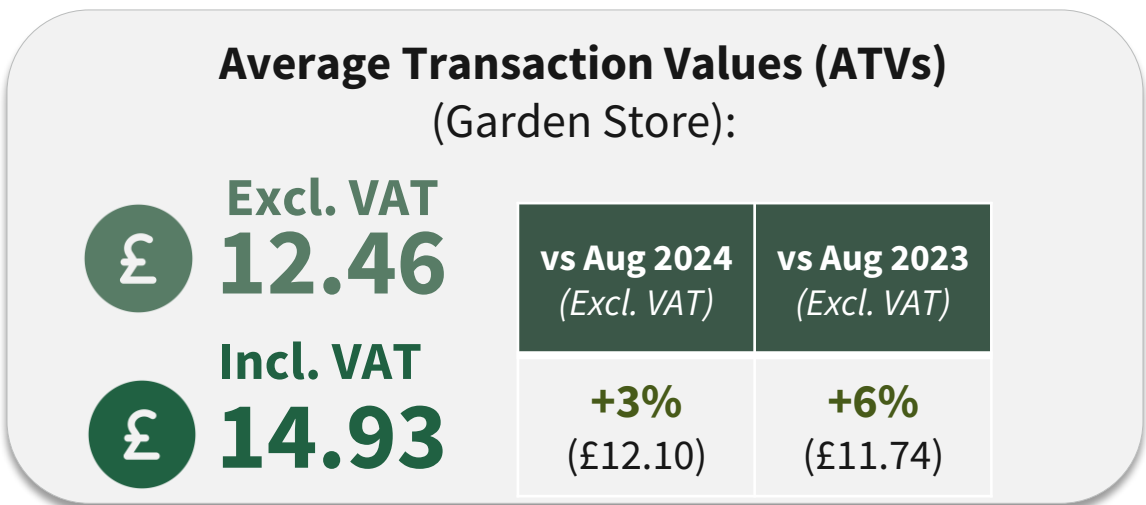
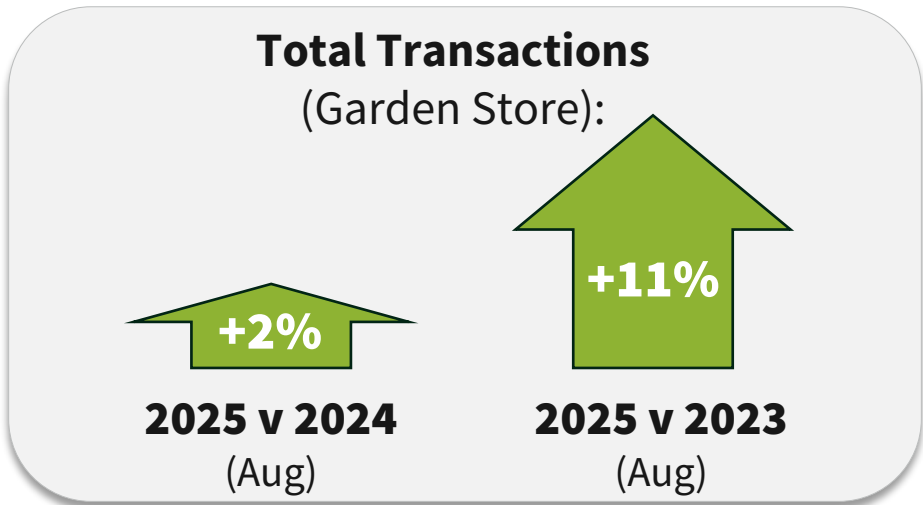
Café/Restaurant; August 2025

Garden centre cafes and restaurants had 3-year-highs for total transactions and average transaction values. Growth in total transactions compared to August 2024 was +2%, a smaller increase than in previous months, likely attributable to the volatile weather.

Total transactions in garden centre cafes rose +2% from August 2024 and +11% from August 2023. The slower growth from 2024 was lower than typically observed for catering in garden centres in recent months. However,

the stormy weather at the start and end of the month likely limited any increases in footfall. Alternatively, the mid-August heatwave likely kept customers away from cafes lacking air conditioning.

Individual customer spend in garden centre cafes in August 2025 was +3% greater on average compared to August 2024, and +6% greater than in 2023. However, as mentioned on page 8, food and drink products appear to have risen in price, which contributed to the increase in sale value per customer.



Source: HTA Garden Retail Monitor



# Gardening Products

## Sales by value; August 2025

Across all gardening products, sales by value rose +3% in August 2025 from August 2024. This table details sales performance by subcategory. Most subcategories showed some degree of growth from the previous year, and all subcategories retain strong leads on previous years for year-to-date sales compared to 2024.

Plant sales were up in August 2025 relative to Augusts 2024 and 2023. Hardy plants showed the greatest growth, suggesting consumers were drawn to longer-lasting plants, particularly as weather conditions get colder. Meanwhile, sales of bedding plants have tapered off as the summer has progressed, following exceptionally strong bedding sales throughout the spring.

Seed and bulb sales grew considerably in August 2025, following poor sales in August 2024. Bulb sales were particularly significant, up +15% from August 2024. However, both categories only rose +2% from August 2023, indicating a return to typical trends.

[HTA's Plant Retail Success guide to link-selling](#) revealed that each year, around 1 in 20 bedding sales also included bulbs, with most of those transactions occurring throughout the Autumn season. Members can use insights such as these to help inform store displays and layouts and drive up sales through increasing basket size.

BBQs and heating was the only subcategory to post a lower total sales value in August 2025 than in 2024, having fallen by -13%. However, BBQ sales were still up by +42% from August 2023. Nonetheless, BBQs and heating remains well ahead of 2024's sales for the year-to-end of August with a lead of +14%, indicating that consumer demand may already have been met earlier in the year.

| Category                     | August 2025<br>vs 2024 | August 2025<br>v 2024 YTD | August 2025<br>vs 2023 |
|------------------------------|------------------------|---------------------------|------------------------|
| Bedding & other plants       | ▲ 1%                   | ▲ 10%                     | ▲ 14%                  |
| Hardy plants, shrubs & trees | ▲ 7%                   | ▲ 7%                      | ▲ 4%                   |
| Indoor plants                | ▲ 5%                   | ▲ 4%                      | ▲ 6%                   |
| Seeds (excl. grass seed)     | ▲ 8%                   | ▲ 6%                      | ▲ 2%                   |
| Bulbs                        | ▲ 15%                  | ▲ 13%                     | ▲ 2%                   |
| Plant care products          | ▲ 6%                   | ▲ 10%                     | ▲ 2%                   |
| Garden tools & equipment     | ▲ 2%                   | ▲ 14%                     | ▲ 17%                  |
| Outdoor containers           | ▲ 5%                   | ▲ 8%                      | ▲ 24%                  |
| Garden sundries              | ▲ 2%                   | ▲ 6%                      | ▲ 14%                  |
| Garden features & structures | ▲ 2%                   | ▲ 16%                     | ▲ 27%                  |
| BBQs and Heating             | ▼ 13%                  | ▲ 14%                     | ▲ 42%                  |
| Garden Furniture             | ▲ 13%                  | ▲ 14%                     | ▲ 4%                   |

Source: HTA Garden Retail Monitor

# Non-Gardening Products

## Sales by value; August 2025

Among non-gardening products, sales grew by +4% in value between August 2024 and August 2025. All subcategories in the table recorded positive growth across this time period. This is particularly noteworthy for wild bird care sales, which have lagged behind other departments for most of the year.

Indoor living was the department which grew most considerably in August 2025, up +13% from August 2024 and up +12% from August 2023. Indoor living has been a strong performer throughout 2025, and were up +11% the year-to-end of August 2025 compared to 2024.

All other categories exhibited solid year-on-year growth in August 2025, by at least +5% relative to August 2024. Catering and food and farm shop products generated much greater sales than in August 2023, with both showing increases of around +20% by value, and over +10% by volume.

Wild bird care's monthly sales grew from the previous year for the first time since March 2025, with growth of +5% between August 2024 and August 2025. However, sales value was still down -6% from August 2023, and year-to-end of August sales of wild bird care remain behind 2024 levels by -2%.

| Category                  | August 2025<br>vs 2024 | August 2025<br>vs 2024 YTD | August 2025<br>vs 2023 |
|---------------------------|------------------------|----------------------------|------------------------|
| Indoor living & homewares | ▲ 13%                  | ▲ 11%                      | ▲ 12%                  |
| Gifting                   | ▲ 7%                   | ▲ 8%                       | ▲ 8%                   |
| Wild bird care            | ▲ 5%                   | ▼ 2%                       | ▼ 6%                   |
| Pets                      | ▲ 5%                   | ▲ 5%                       | ▲ 5%                   |
| Food & farm shop          | ▲ 6%                   | ▲ 12%                      | ▲ 22%                  |
| Catering                  | ▲ 5%                   | ▲ 10%                      | ▲ 18%                  |

Source: HTA Garden Retail Monitor

# Category Shares by Value

August 2023-2025

Since the start of this year, we began 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, whilst highlighting any short-term changes in customer purchasing behaviour.

The make-up of August 2025's total turnover appears broadly in line with previous years, with minimal movement between categories in the last 3 years.

Live plants, bulbs, and seeds has consistently held around a quarter of August's turnover over the last three years and retained that share in 2025.

The second largest category by turnover, catering, increased its share slightly in August 2025 up to 16%. This is likely because catering transactions increased from August 2024, whereas transactions were flat in the rest of the garden centre. Catering will likely take up an increasing share of monthly turnover throughout the coming Autumn months.

Garden care made up the next largest share of turnover, followed by outdoor living. The weak BBQ and heating sales observed on page 9 likely contributed to the decline in share of outdoor living, although the change is marginal.

| Category                         | August 2025 | August 2024 | August 2023 |
|----------------------------------|-------------|-------------|-------------|
| Live plants, bulbs, & seeds      | 25%         | 25%         | 26%         |
| Catering                         | 16%         | 15%         | 15%         |
| Garden care & maintenance        | 10%         | 10%         | 10%         |
| Outdoor living                   | 9%          | 10%         | 10%         |
| Garden containers & structures   | 9%          | 9%          | 8%          |
| Other non-garden products        | 7%          | 8%          | 7%          |
| Homewares & floristry            | 6%          | 6%          | 7%          |
| Gifting                          | 5%          | 5%          | 5%          |
| Food hall & farm shop            | 5%          | 5%          | 4%          |
| Wild bird care, pets, & aquatics | 4%          | 4%          | 5%          |
| Other garden products            | 2%          | 2%          | 2%          |
| Miscellaneous                    | 2%          | 1%          | 1%          |

Source: HTA Garden Retail Monitor

# Year-to-Date Sales

## Calendar year to August 2025

**At the end of August 2025, garden centres continue to retain a healthy lead on previous years. Overall sales were +9% ahead of 2024 at this point in the year, and +8% ahead of 2023.**

Excluding catering, the difference in sales up to the end of August was largely the same, with a +9% increase on 2024 and +7% from 2023.

Garden product sales continue to be the strongest performer in 2025 relative to 2024, with a +10% lead on sales for the year so far. This lead has held following the strong spring sales and is unlikely to diminish significantly as gardening sales typically make up a smaller proportion of turnover for garden

centres late into the autumn and winter.

Non-gardening departments meanwhile have grown steadily in all months since January 2025, which was reflected in a similarly strong sales increase in August 2025. When catering is excluded, year-to-end of August 2025 sales were up +8% from 2024 and up +10% from 2023.

Although year-to-date sales positions have narrowed slightly since the end of spring, continued sales growth in the summer months has helped to maintain the strong lead established early in the year.

|                                    | Overall<br><i>Incl. catering</i> | Overall<br><i>excl. catering</i> | Garden/<br>Gardening | Non-garden<br>/gardening<br><i>Incl. catering</i> | Non-garden<br>/gardening<br><i>Excl. catering</i> |
|------------------------------------|----------------------------------|----------------------------------|----------------------|---|---|
| YTD Aug 2025<br>vs<br>YTD Aug 2024 | ▲ 9%                             | ▲ 9%                             | ▲ 10%                | ▲ 9%  | ▲ 8%  |
| YTD Aug 2025<br>vs<br>YTD Aug 2023 | ▲ 8%                             | ▲ 7%                             | ▲ 5%                 | ▲ 15%   | ▲ 10%   |

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

### How were 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

# National Weather

## August 2025 v August 2024





August 2025 was characterised by unsettled weather across the UK, with wet and stormy weather at the start and end of the month having been divided by a heatwave in the second week of the month. Despite the variation, August 2025 was almost 1°C hotter and received half the total average rainfall compared to August 2024, though rainfall was starkly different by region of the UK.

The average UK temperature in August 2025 was 16.3°C (including overnight temperatures), up +0.9°C from August 2024. In spite of the stormy weather at the start and end of the month, the UK also enjoyed 180.7 hours of sunshine – an increase of 12%.

Rainfall was incredibly varied across the UK in August 2025, with page 14 highlighting the stark contrast between different regions. Overall, August 2025’s average total rainfall was almost half the level seen in August 2024, down from 104.5mm to 58.4mm. However, this reflects the dry conditions that England received throughout most of the month, with other regions receiving considerably more rainfall throughout August.

Although conditions are expected to get wetter in the coming months, most regions in England remain in at least prolonged dry weather (PDW). More information on the UK’s current water situation can be found on pages 15 and 16.

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.

|  | August 2025 | August 2024 |
|--|-------------|-------------|
| <br>Mean temperature (°C)         | 16.3        | 15.4        |
| <br>Hours of sunshine             | 180.7       | 161.3       |
| <br>Total Rainfall (mm)           | 58.4        | 104.5       |
| <br>No. of rain days (>1mm/day) | 9.2         | 13.5        |

Source: MET Office



# Regional Weather

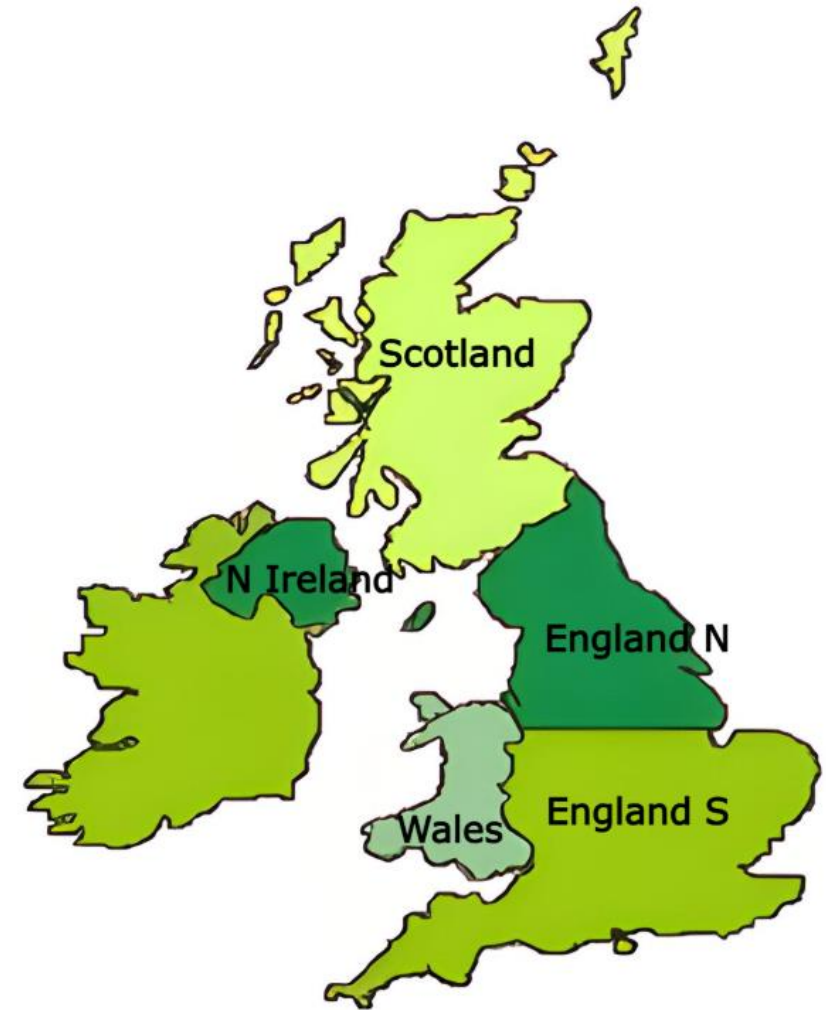
## August 2025

When split regionally, the divide between weather conditions seen across the UK in August 2025 becomes clear. Scotland and Northern Ireland were notably wetter than the rest of the UK, with exceptionally low rainfall seen across England.

The minimal rainfall seen across England made it one of the driest Augusts on record, despite the last week of August receiving the most rainfall since the end of January 2025.

Scotland was the wettest region of the UK and also saw much lower average temperatures than all other regions, having been most heavily affected by Storm Floris at the start of the month.

| Region           | Mean Temp (°C) | Hours of sunshine | Rainfall (mm) | Rain days (> 1mm/day) |
|------------------|----------------|-------------------|---------------|-----------------------|
| Overall          | 16.3           | 180.7             | 58.4          | 9.2                   |
| Scotland         | 12.9           | 99.9              | 153.3         | 14.6                  |
| Northern Ireland | 15.9           | 66.8              | 138.7         | 12.1                  |
| North England    | 16.6           | 182.5             | 35.0          | 7.6                   |
| South England    | 17.8           | 210.4             | 29.3          | 5.9                   |
| Wales            | 16.3           | 185.9             | 67.2          | 10.1                  |



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

Source: MET Office

# Water Availability

## River and Groundwater Levels

**The majority of England remains in prolonged dry weather (PDW) or drought conditions, with exceptions in Devon and Cornwall, London, and the South East.**

Unchanged from last month, the Northwest, Yorkshire, and Midlands regions all remain in drought.

Following the heavy rainfall at the end of August, river flows have risen across England. Despite this, 69% of sites remain below normal levels, with 9% of sites at exceptionally low levels.

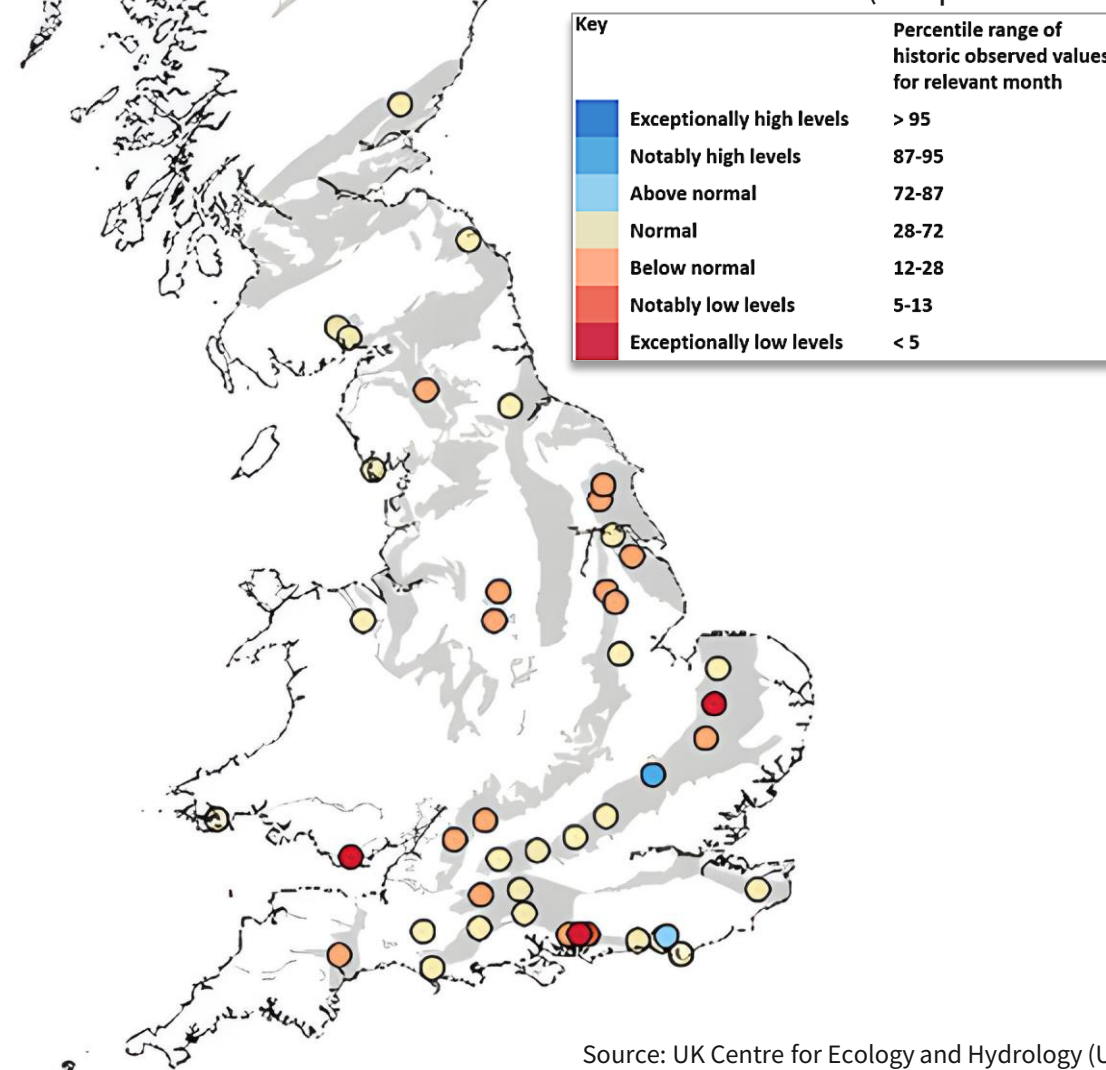
Groundwater levels are broadly expected to return to normal over the next 3 months, although low groundwater may persist in parts of central England, South Wales, and the South Downs.

The HTA continues to represent horticulture on the Environment Agency's National Drought Group and continues to closely monitor the impact of any ongoing dry weather on water resources and risk of water use restrictions (more on page 16).

## 3-month Groundwater Outlook

based on median rainfall forecast

(9<sup>th</sup> September 2025)



Source: UK Centre for Ecology and Hydrology (UKCEH)

# Reservoir Levels

## England and Wales

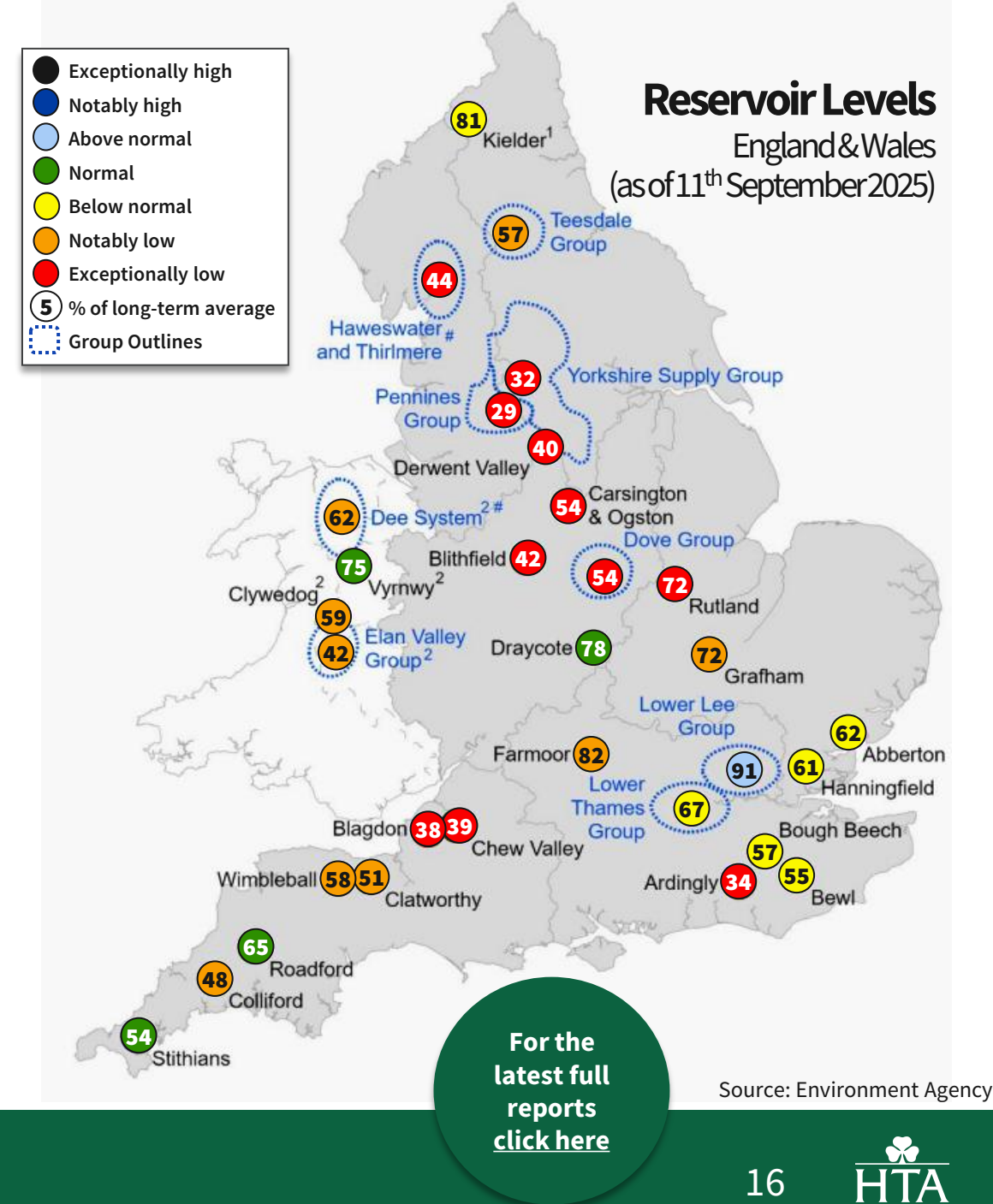
Since August 5<sup>th</sup>, England's average public water reservoir levels have dropped from 67.7% to 56.5% of capacity. Although the fall is in line with seasonal expectations, 5 reservoirs are now below 40% capacity, with the Pennines Group reservoir currently below 30% capacity.

Temporary use bans remain in place for consumers in four regions: the Thames Valley, Yorkshire, Southampton & Isle of Wight, and Kent & Sussex. According to the Environment Agency (EA), 43 drought permits have been sought by water companies, with 5 having been approved by the EA. These have mostly been sought by Yorkshire Water.

Reservoirs under the control of Severn Trent and South Staffordshire Water also remain under close monitoring from the EA, with reservoirs continuing to decline faster than anticipated.

The HTA continues to closely monitor the situation and attend meetings of the National Drought group. Recent [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](#).



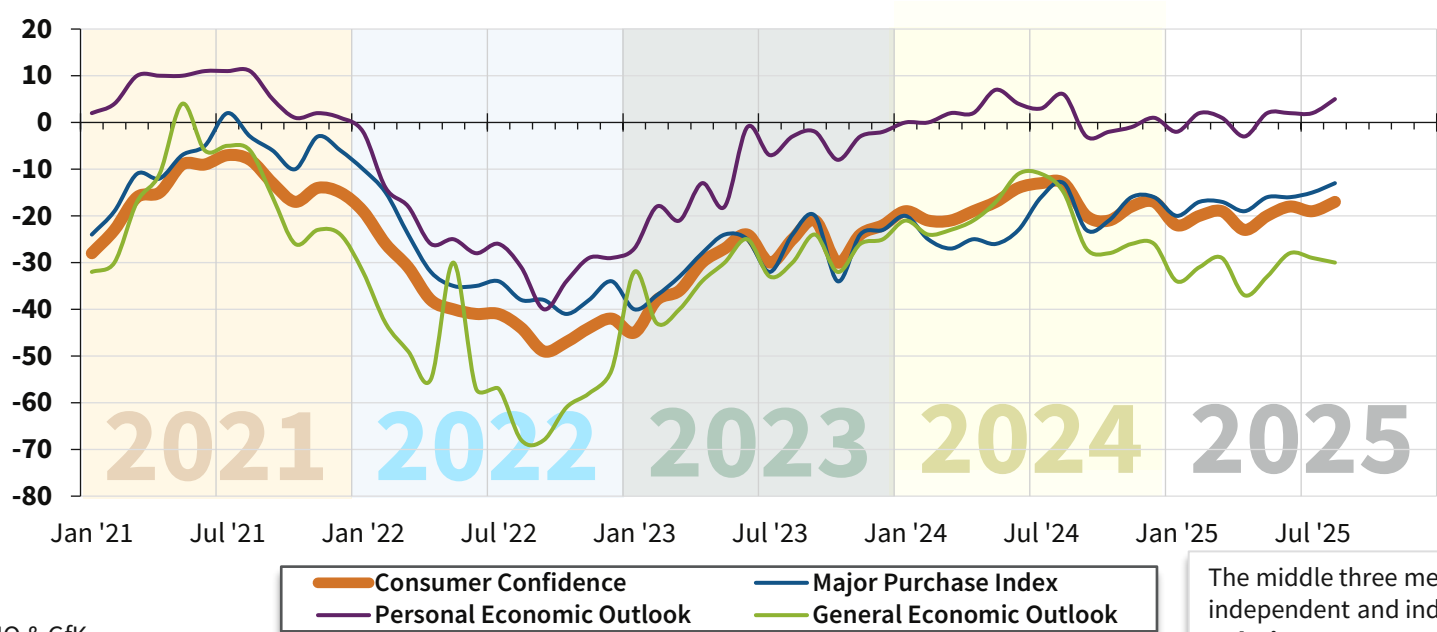
# Consumer Confidence

Outlooks of UK Consumers continue to rise gradually, reaching a new high score of -17 for 2025. However, this remains low in historic terms. The savings index also recovered slightly, down 4pts following last month's 7pt increase.

Consumers outlook on their personal finance improved to 5pts overall, rising 3 pts since July 2025. This marks the highest score for personal financial outlooks since August 2024. Meanwhile, consumers' general outlooks fell by 1pt to -30.

The Major Purchase Index continued to rise, up by 2 points from July 2025, marking the joint-highest score since the cost-of-living crisis. This suggests that consumers continue to feel as though now is a better time to make major purchases (i.e. furniture, electrical goods, etc.).

The Bank of England's cut to interest rates likely helped improve consumer sentiment towards their finances. However, uncertainties remain regarding potential tax rises in the coming Budget, with consumers maintaining a "wait-and-see" approach.



| Measure  | Relative score<br>(August 2025) | vs<br>July 2025 |
|--|---------------------------------|-----------------|
| Overall Consumer Confidence                    | -17                             | ▲ 2             |
| Personal financial outlook<br>(next 12 months) | 5                               | ▲ 3             |
| General economic outlook<br>(next 12 months)   | -30                             | ▼ 1             |
| Major Purchase Index                           | -13                             | ▲ 2             |
| Savings Index                                  | 30                              | ▼ 4             |

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: 2,002 UK Individuals aged 16+, interviewed August 1<sup>st</sup> – August 14<sup>th</sup> 2025.

# Consumer Spending

August 2025

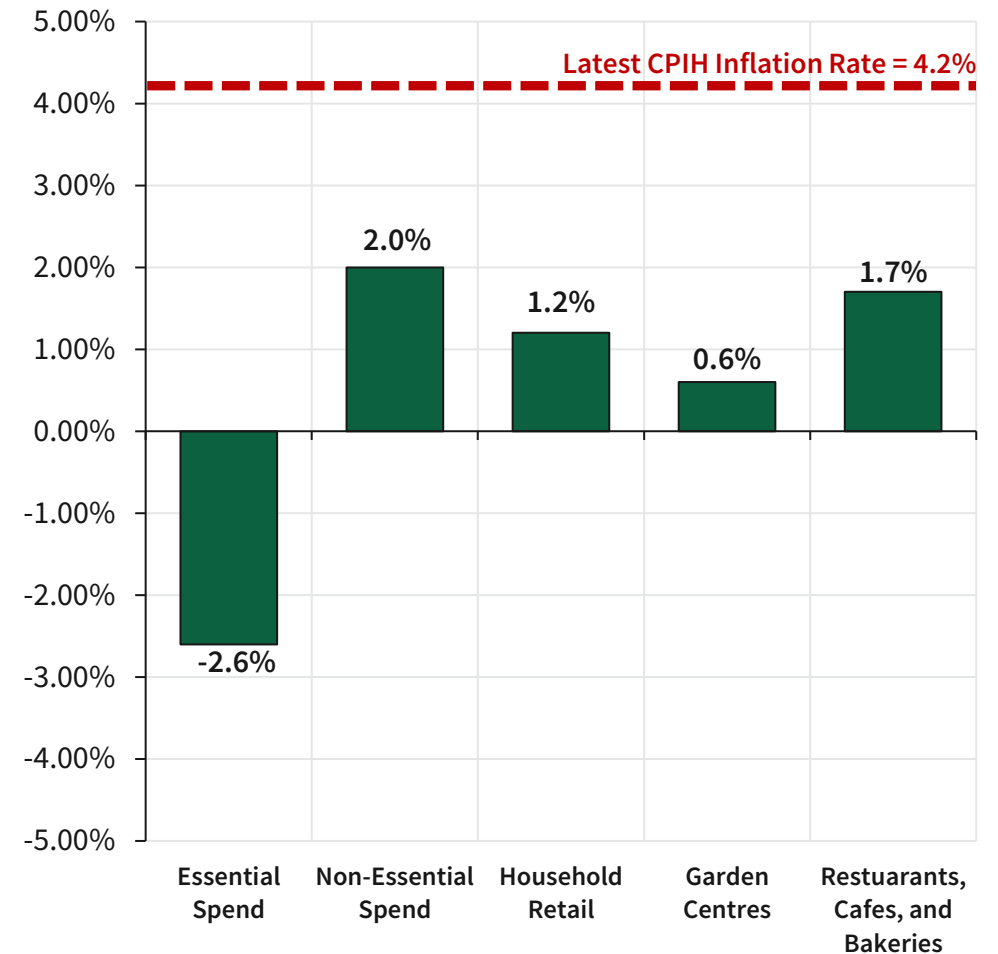
In our last edition of Market Update, we reported on Barclay's card transaction data for the first time. This section offers a benchmark of garden centre sales performance against other retail sectors, while giving a view on how consumer spending may be changing more broadly.

In August 2025, consumers spend on “essentials” was down -2.6% compared to the previous year, while “non-essential” spend rose 2.0%. Essential spend includes groceries, childcare, healthcare, insurance, fuel, and public transport. Non-essential spend includes all other purchases.

Although non-essential spend rose, both essential and non-essential spend fell in real terms relative to CPIH inflation (see page 19).

Barclays reported that consumer spend on household retailers (home improvement, electronics, furniture, and gardening) was up 1.2% from August 2024, whilst garden centre spend only rose by 0.6%. However, this does not include cash, gift cards or transactions from other payment processors, which likely explains the discrepancy with our reporting that sales rose by +3% in August (see page 5).

Consumer spend on food and drink rose slightly more than it did on household retail, with card spend at restaurants and cafes rising by 1.7% between August 2024 and August 2025. This also marked a fall in real terms. Moreover, growth in general restaurant and café sales remains notably behind the growth seen in garden centre cafés and restaurants across the same period (+5%, see page 10).



Source: Barclays Consumer Spending Report – 26th July 2025 to 22nd August 2025.



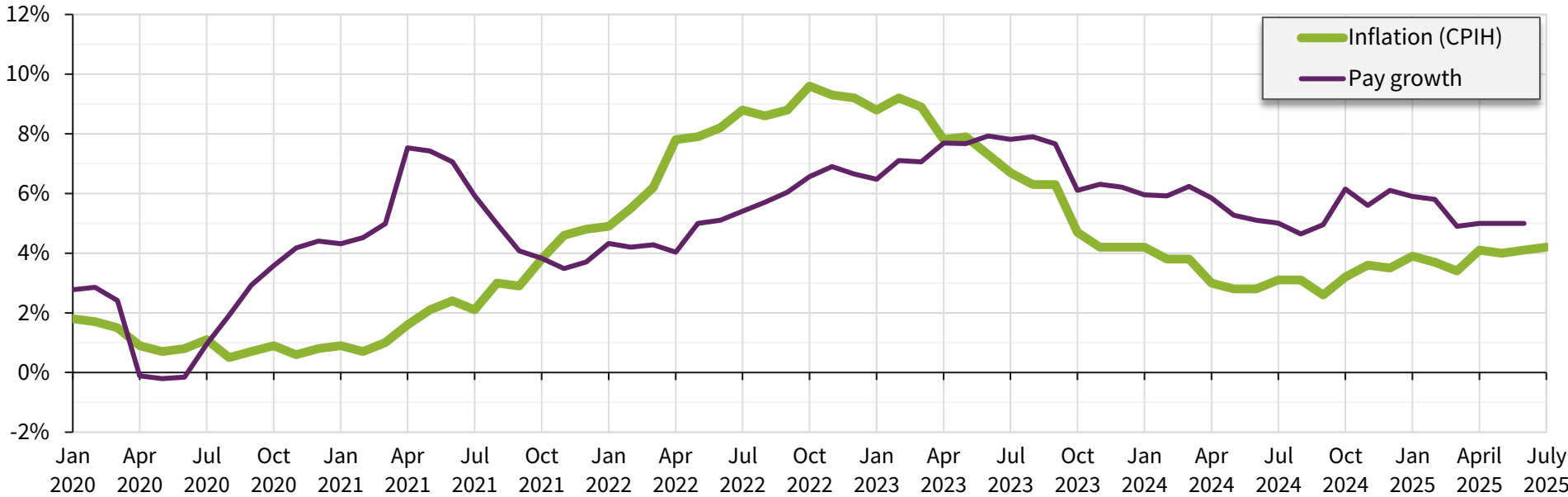
# Inflation and Wages

**Inflation (CPIH) rose by 0.1% for a second consecutive month to 4.2% - the highest inflation since January 2024. Meanwhile, salary growth and unemployment remain stable on the previous month.**

Regular pay growth of average weekly earnings rose by 5.0% in the period between April and June 2025. This remains ahead of inflation, although as inflation continues to creep upwards the

gap between the two will likely continue to narrow. The two measures remain within 1% of each other for a third consecutive month.

Meanwhile, unemployment remained stable on the previous period (Mar-May) at 4.7%. This remains on the higher end of normal bounds and is up +0.5% relative to the same period last year.



CPIH  
inflation  
(July 2025)  
= **4.2%**

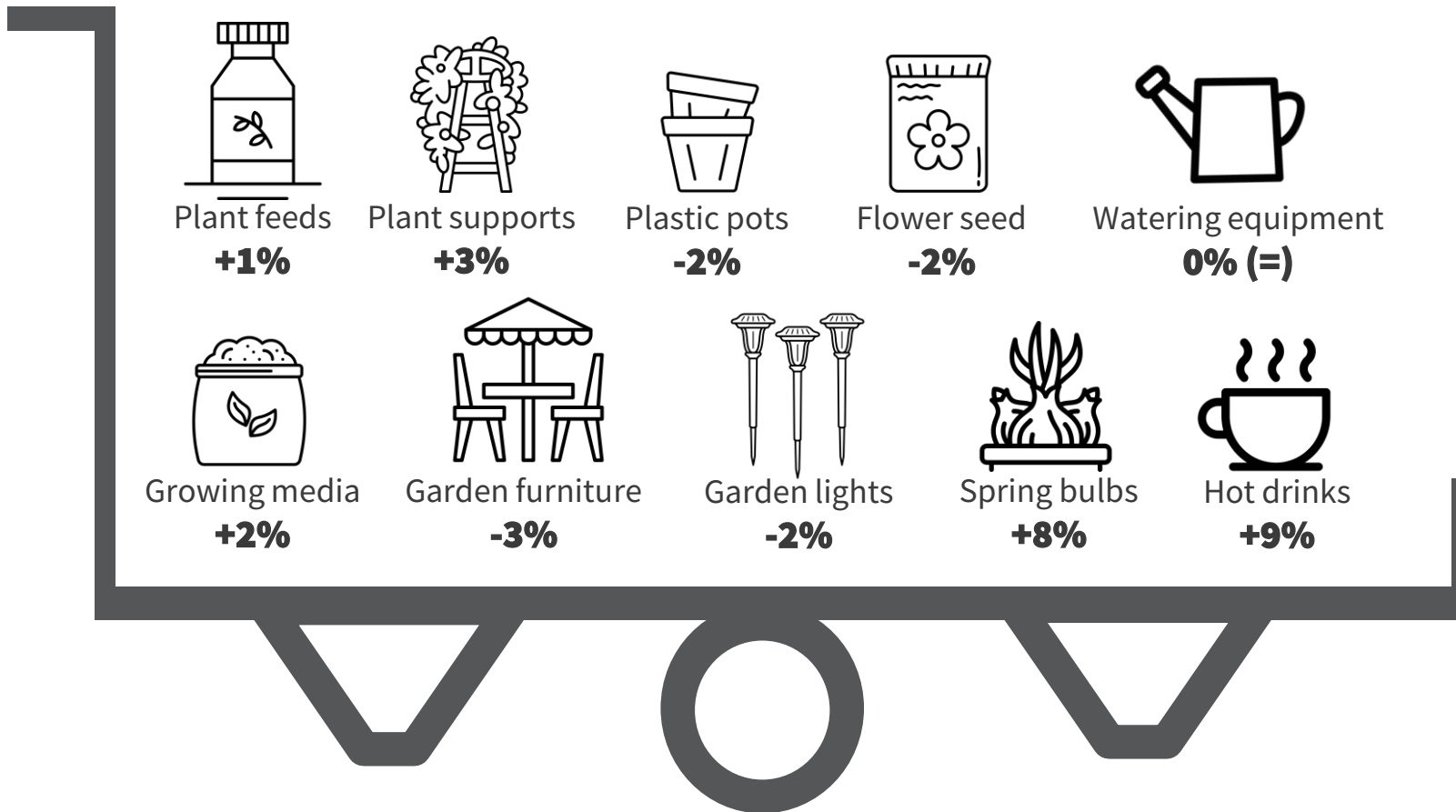
Regular  
pay growth  
(Apr-Jun 2025)  
= **5.0%**

Unemployment  
Rate  
(Apr-Jun 2025)  
= **4.7%**

Source: Office for National Statistics

# Retail Inflation

August 2025 v August 2024



Our analysis compares the prices of individual items purchased in garden centres between August 2025 and August 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 August 2025 basket, a variety of price changes can be observed. Hot drink prices were +9% higher in August 2025 than the previous year, while spring bulbs prices rose by +8% - both notably ahead of the CPIH rate of 4.2%

Several categories also saw price deflation in August 2025 – most likely a product of discounting to move the last of seasonal stock. Garden furniture prices were down -3%, flower seed down -2%, and garden lights down -2%.

Meanwhile, prices for watering equipment, plant feeds, and growing media remain broadly stable from August 2024.

Source: HTA Garden Retail Monitor

# Retail Inflation on Outdoor Plants

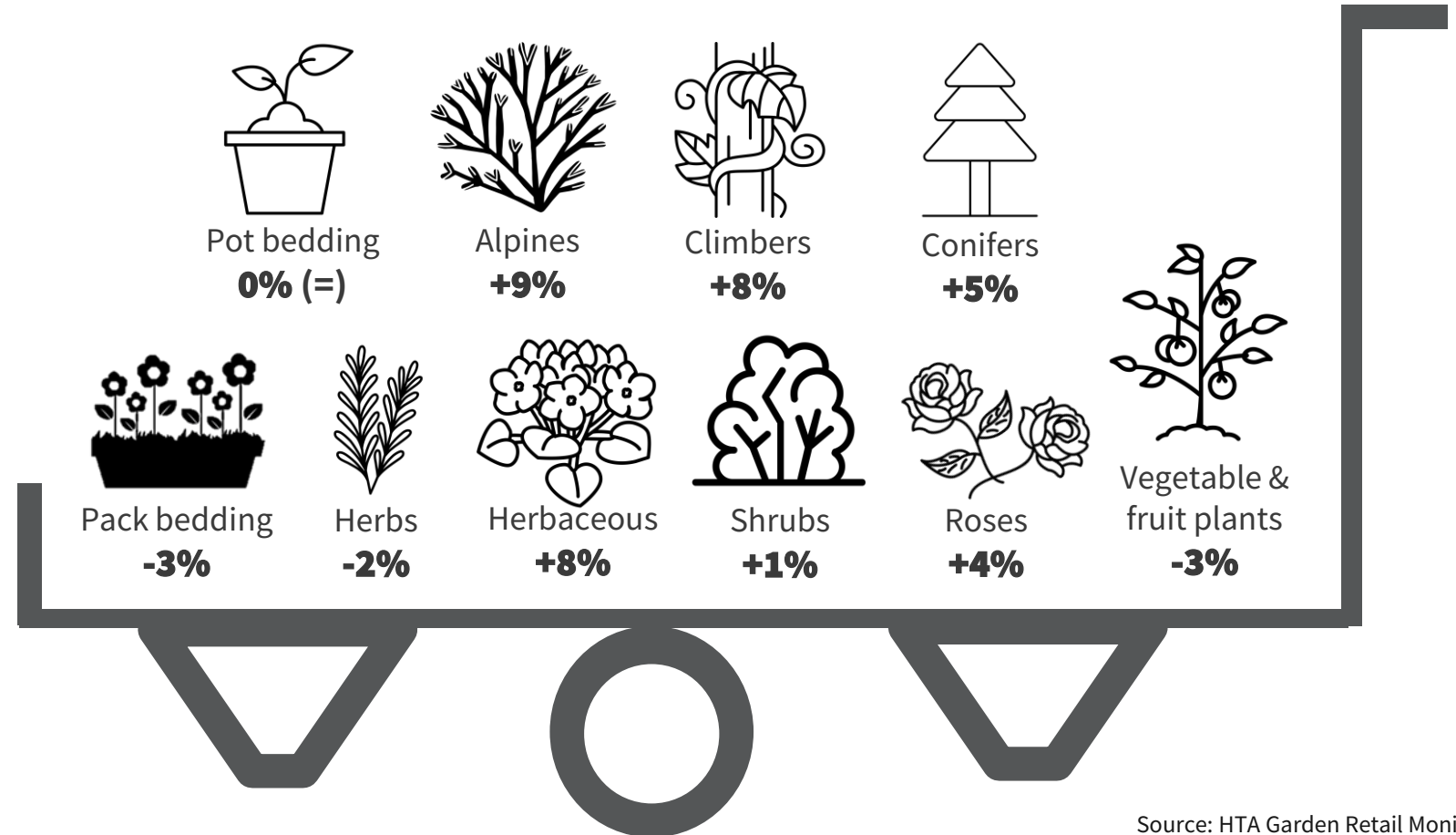
August 2025 v August 2024

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

Herbaceous plants, climbers, and alpines continue to display price rises above inflation for a third consecutive month. Conifer and rose prices also rose in line with inflation.

Pot bedding and shrub prices were broadly level with last year, although this may mask possible variation between price rises and discounting

Various plants exhibited price deflation in August 2025, and in many cases, this is likely a result of summer stock being shifted in multi-buy offers or discounting. Herbs, pack bedding, and fruit and vegetable plants were all typically cheaper than at this point last year, potentially indicating that significant price reductions were made to shift stock.



Source: HTA Garden Retail Monitor

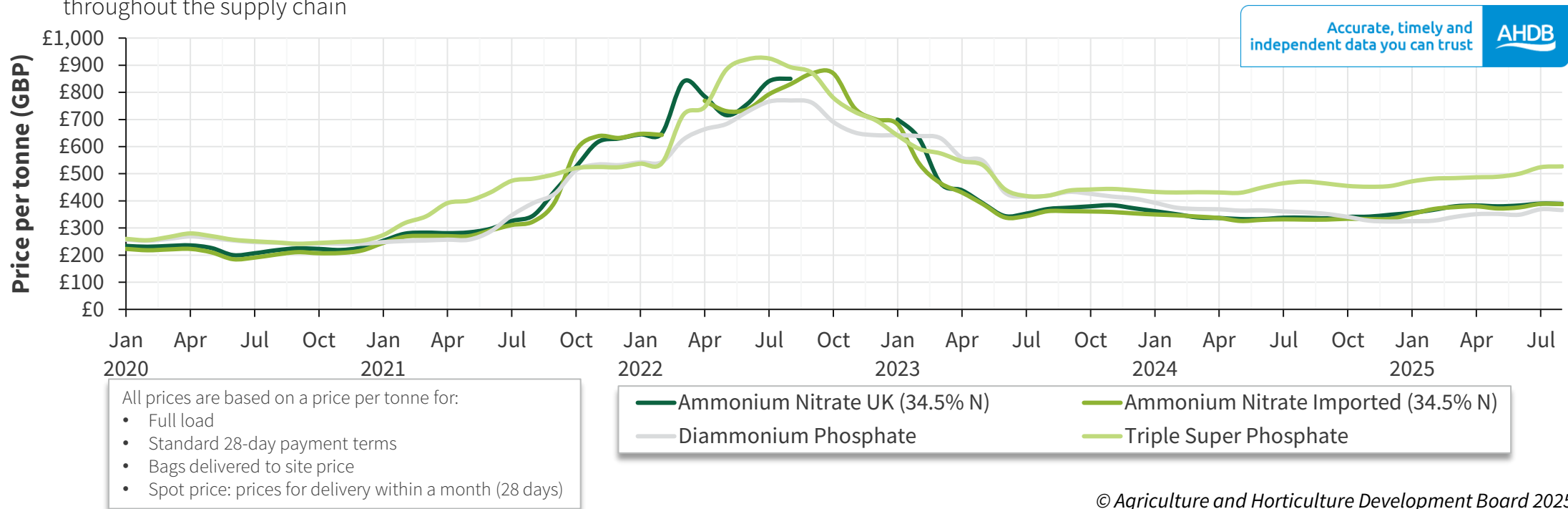
# UK Fertiliser Prices

The cost of fertiliser components has been rising steadily over the past year. Of the four components we track, all except Muriate of Potash have undergone price increases between 11-15% since July 2024.

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

All components have risen in price in the last year. Muriate of Potash prices were most stable, rising 2% year on year. Meanwhile, the cost of Ammonium Nitrate has risen by around 15% (both UK and imported), whilst Triple Super Phosphate prices were up 11% relative to the previous year.

Given the upward trajectory of all tracked components, overall fertiliser prices may rise in the short term to maintain producers' profit margins.



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# Shipping Container Prices

Drewry's World Container Index (WCI) of shipping container prices has stabilised following 13 weeks of consecutive decline. However, this masks severe volatility in pricing for different trade routes, with significant movements in opposite directions resulting in a stable index.

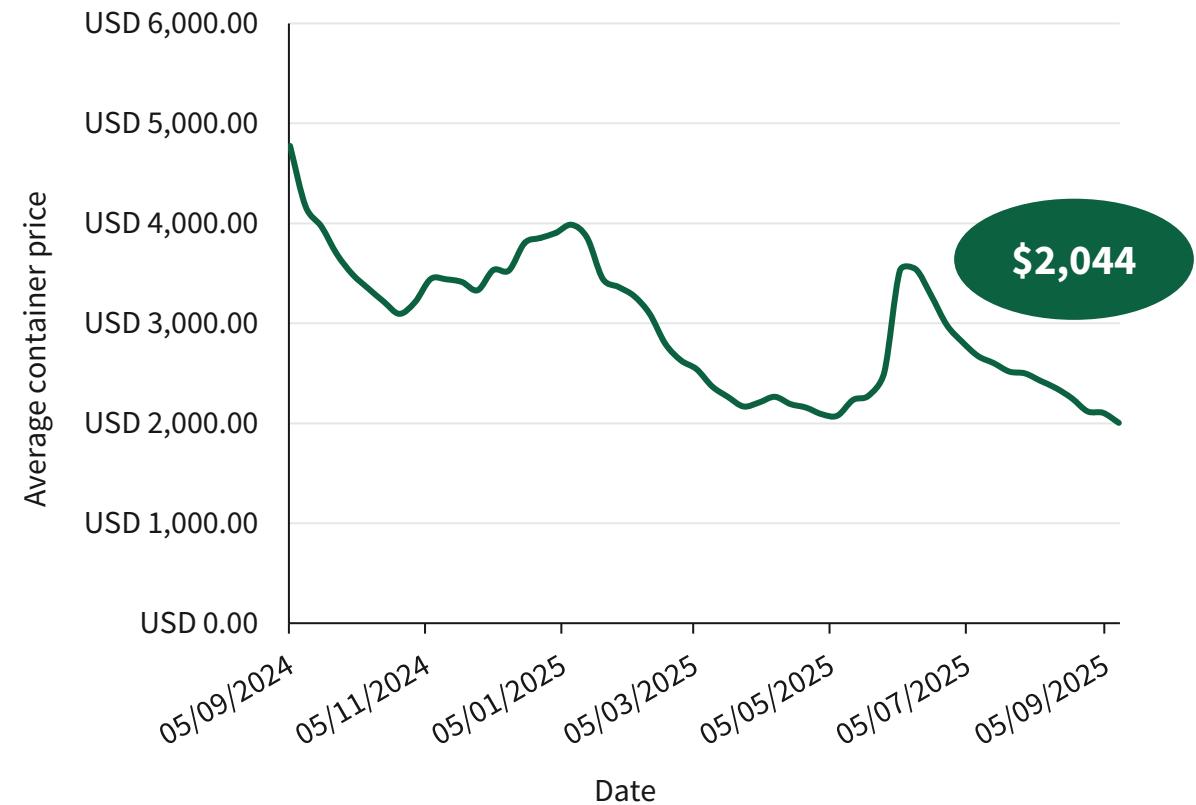
Each month, we report on a composite index which is an aggregate of major shipping costs across various routes. The Drewry World Container Index (WCI) was at \$2,044 per 40ft container as of August 7<sup>th</sup>, 2025, down -57% relative to September 2024.

Drewry's index remains steady despite opposing trends – rising transpacific rates offset by falling Asia-Europe rates. Further declines in spot-rates are expected over the next month, although this remains subject to future potential Trump tariffs.

The balance between supply and demand is expected to weaken in the second half of 2025, with excess vessel capacity particularly affecting Asia-Europe routes despite healthy demand. Consequently, this will likely further drive average container prices downwards – again subject to any changes in US tariffs.

## Drewry World Container Index (WCI)

11<sup>th</sup> September 2025 (USD/40ft container)



Source: Drewry World Container Index (WCI)



# Closing Comments

## Get in touch

We hope you enjoyed the format and content of September 2025's 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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