



Market Update

October 2025

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Overview

- Garden centres saw modest sales growth in September 2025, with sales up +3% by value from September 2024 and +7% from 2023; though performance varied significantly between individual retailers due to September being one of the smallest trading months for garden centres.
- Sales volumes (+4%) slightly outpaced sales value growth (+3%) in September 2025, indicating a shift in the make-up of consumer baskets towards lower-value goods.
- Gardening sales rose by just +1% from September 2024 and were down -4% from September 2023. Live plant sales were up slightly on 2024, although hardy plant sales were down by -10% in September 2025 compared to September 2023.
- However, strong bulb and seed sales in September signalled healthy autumn gardening demand. Both categories were up 7-8% versus 2024 and up 17% versus 2023, likely supported by warmer, wetter weather making ground conditions more favourable for planting.
- Non-gardening sales drove most of garden centres' sales growth, having risen +7% compared to September 2024 and +17% compared to 2023. Strong performance was maintained even when excluding catering, with gifting, indoor living, and food & farm shop products all performing well.
- Average transaction values were stagnant and remained flat for a consecutive year. Considering price inflation, it is likely that this further indicates that baskets contained more lower-value goods compared to previous years.
- September delivered typical seasonal weather following months of extremes, with slightly more rain and marginally lower temperatures when compared against Septembers' long-term average.
- Consumer confidence continued to stay steady but low, falling -2pts overall since August 2025. Consumers' outlooks have remained broadly stable over the past 12 months and show little-to-no sign of recovery in the context of high inflation and unemployment.
- On average, garden centres remain ahead of previous years despite September's mixed performance, due to the small relative size of the month. Overall year-to-end of September sales were +10% ahead of 2024, and +11% ahead of 2023; however, garden centres are needing to see sales increases of 10-15% to accommodate the rising costs of doing business, suggesting a strong Christmas trading period will still be much needed.

Read on for all the detail...

Key Points

September 2025



Overall garden
centre sales rose by
+3% from
September 2024



Seed and bulb
sales grew by
+7%
compared to
September 2024



Catering sales
were up by
+7% from
September 2024



**Consumer confidence
fell by 2 pts,**
having remained
consistently low over the
past 12 months



**September 2025's
weather was mixed,**
although heavy rain
helped improve water levels in
some regions



Garden Centre Sales

September 2025

In September 2025, garden centre sales were up +3% by value from September 2024, and up +7% by value from 2023. Performance was mixed across departments, with non-gardening sales responsible for most of the growth seen this September.

In our sample of retailers and stores, there was a higher degree of variance between figures than normal in September. This is likely because September is one of the smallest months for garden centre sales, meaning that the absolute difference in figures is often smaller than the percentage difference may suggest.

Garden/gardening sales were relatively slow for a second September running. Sales were up +1% from 2024 but were down -4% from 2023. There may be an element of consumer demand for gardening products having already been met earlier in the year, although the wet conditions throughout September likely had a negative impact on sales and footfall in outdoor plant areas given that September 2023 was the UK’s hottest on record.

In stark contrast, non-gardening sales were +7% ahead of September 2024, and +17% ahead of September 2023. Even when catering is excluded, non-gardening retained a similar lead on previous Septembers.

	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>
Sept. 2025 vs Sept. 2024	▲ 3%	▲ 5%	▲ 1%	▲ 7%	▲ 6%
Sept. 2025 vs Sept. 2023	▲ 7%	▲ 3%	▼ 4%	▲ 17%	▲ 14%

(Reported changes are 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/

Source: HTA Garden Retail Monitor

Garden Centre Sales by Volume

September 2025

Overall volumes rose by +4% in September 2025 from September 2024 and were up +7% compared to September 2023.

Volumes outpaced values at the top level – likely due to consumers opting for typically lower-value goods. As an example, hardy plant sales lagged behind the growth of bedding sales.

Within the gardening category, sales volumes were down -1% from September 2024, and down -5% from September 2023, further underlining the muted sales performance of garden goods in September 2025. Given that 2025's total gardening sales remain +9% ahead of the year-to-end of September 2024, this reflects a cooling in demand following the strong start to the year.

Meanwhile, non-gardening sales were up +6% by volume on September 2024 and up a more substantial +14% on September 2023. Growth was observed even excluding catering (up +3% and up +9% on 2024 and 2023 respectively).

Comparing the small differences between sales values and volumes with the level of inflation among goods sold in garden centres (see pages 20-21), it further suggests that consumers were typically opting to buy lower-value goods in September 2025 when compared to previous Septembers.

	September 2025 vs September 2024		September 2025 vs September 2023	
	Sales Value (£, Exc. VAT)	Sales Volume (n)	Sales Value (£, Exc. VAT)	Sales Volume (n)
Overall <i>Incl. catering</i>	▲ 3%	▲ 4%	▲ 7%	▲ 7%
Overall <i>Excl. catering</i>	▲ 8%	▲ 2%	▲ 3%	▲ 2%
Garden/ gardening	▲ 1%	▼ 1%	▼ 4%	▼ 5%
Non-garden/ gardening <i>Incl. catering</i>	▲ 7%	▲ 6%	▲ 17%	▲ 14%
Non-garden/ gardening <i>Excl. catering</i>	▲ 6%	▲ 3%	▲ 14%	▲ 9%

Sources: HTA Garden Retail Monitor

Average Transaction Values (ATVs) and Transaction Numbers

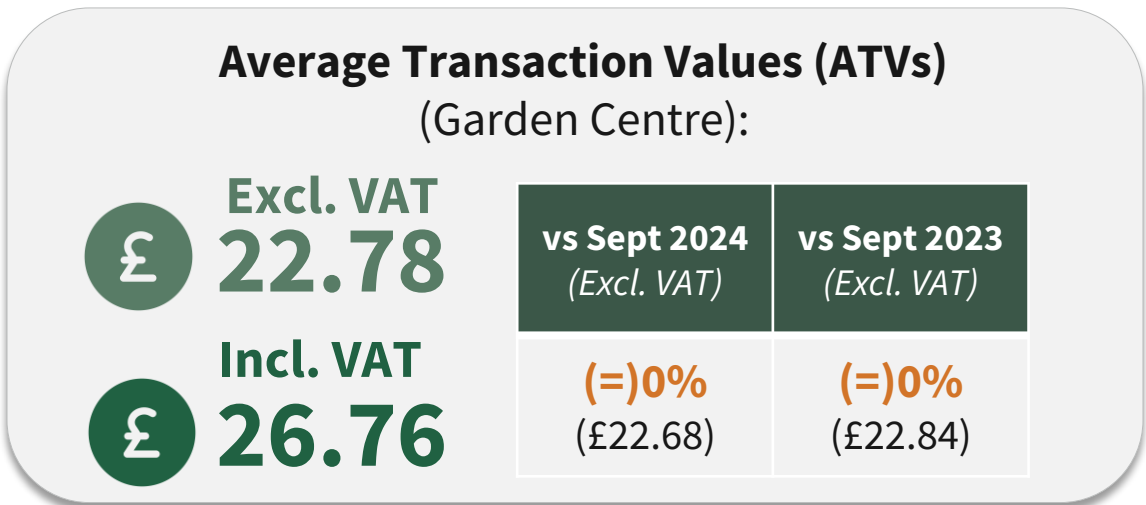
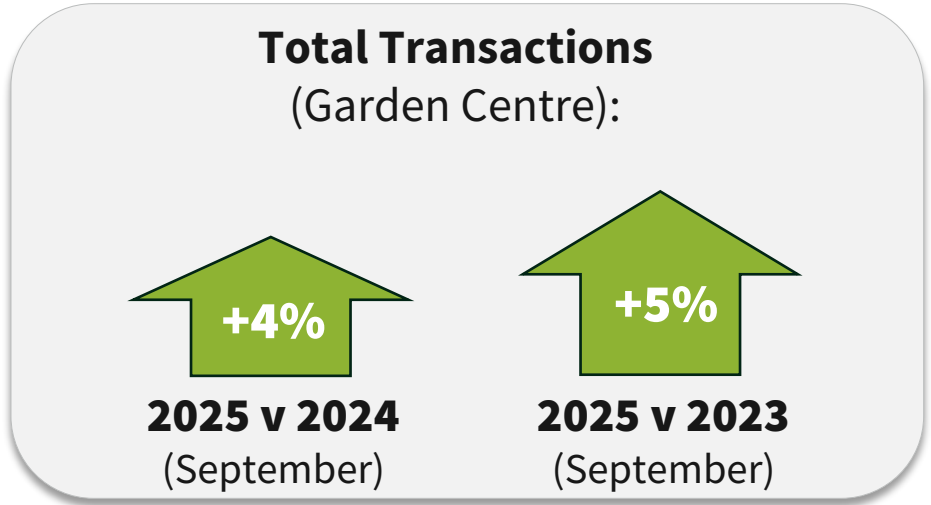
Garden Centre (excluding café/restaurant); September 2025

Total transactions in garden centres were up +4% in September 2025 compared to September 2024. However, average transaction values were flat on both 2024 and 2023.

Increased footfall appears to have been the main driver of growth in garden centre sales, with transactions up +4% from last year and up +5% compared to September 2023. This makes up the majority of the +5% increase seen in overall sales value (excluding catering) since September 2024.

Comparatively, consumers' individual spending remained flat on both September 2024 and 2023, with an average spend of £22.78 per transaction (excluding VAT).

Given the current level of inflation (see pages 18-20), transaction values remaining flat on previous years while volumes have increased continues to indicate that consumers generally opted to buy lower-value items in September 2025 than compared to other years.



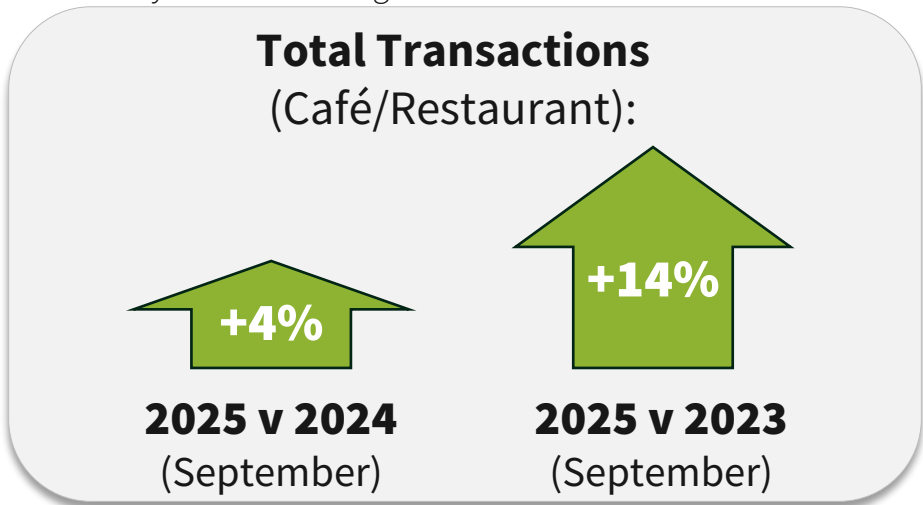
Source: HTA Garden Retail Monitor

Average Transaction Values (ATVs) and Transaction Numbers

Café/Restaurant; September 2025

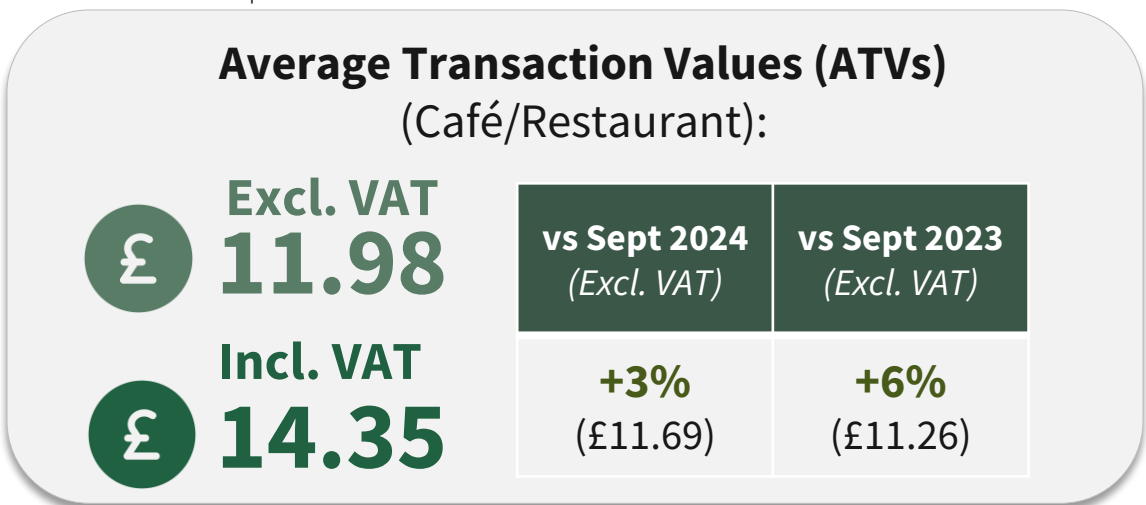
Transaction numbers and average consumer spending were both up in garden centre cafes in September 2025. The strong performance this month resulted in catering sales value rising +7% compared to September 2024, and up +22% from 2023.

Total transactions in garden centre cafes and restaurants rose by +4% compared to September 2024, and by +14% compared to September 2023. Similarly to the rest of the garden centre, increased footfall in September was the key driver of sales growth.



Average transaction values in garden centre cafes and restaurants also rose by +3% compared to September 2024, and +6% compared to 2023, with an average transaction value of £11.98 excluding VAT.

However, we’ve recorded particularly high inflation among catering goods for several months, with prices of hot drinks hot drinks remaining +8% higher in September 2025 compared to last year. This means that the growth in average transaction value is both a combination of slightly higher volumes and price inflation.



Source: HTA Garden Retail Monitor

Gardening Products

Sales by value; September 2025

Gardening product sales showed mixed performance in September 2025, resulting in a modest sales value increase of +1%. Seeds and bulbs continued their strong performance from August. Higher-value categories experienced notable falls in sales value, although this may indicate demand having already been met as they still retain healthy leads for the year-to-date.

Live plant sales in September 2025 were broadly steady compared to September 2024, though they fell short of September 2023 levels. Hardy plant sales increased by +2% from last year but were -10% down from September 2023. However, September 2023 was the UK's joint-hottest September on record, which will have helped boost plant sales.

Indoor plants sales also declined -8% from both Septembers 2024 and 2023. Weaker plant sales overall likely contributed to a fall in demand for outdoor containers, which hit a 3-year low in total sales value for September.

Seed and bulb sales showed encouraging signs for autumn gardening activity. Both categories were up 7% and 8% respectively compared to September 2024, and up 17% from September 2023. [HTA's Plant Retail Success guide to link-selling](#) revealed that around 1 in 20 bedding sales also include bulbs. The strong performance of bulbs this September may be supporting bedding sales to some degree, as bedding was the top-performing plant category.

Garden leisure, outdoor living, and tools sold less than in previous years, however, all subcategories remain ahead for the year-to-date. Consumers likely made replacements to these products earlier in the year, leading to reduced demand in September 2025.

Category	Sept 2025 vs 2024	Sept 2025 v 2024 YTD	Sept 2025 vs 2023
Bedding & other plants	▲ 4%	▲ 10%	▼ 2%
Hardy plants, shrubs & trees	▲ 2%	▲ 7%	▼ 10%
Indoor plants	▼ 8%	▲ 1%	▼ 8%
Seeds (excl. grass seed)	▲ 7%	▲ 11%	▲ 17%
Bulbs	▲ 8%	▲ 11%	▲ 17%
Plant care products	▲ 12%	▲ 9%	▲ 3%
Garden tools & equipment	▼ 5%	▲ 11%	▼ 16%
Outdoor containers	▼ 1%	▲ 8%	▼ 5%
Garden sundries	▲ 2%	▲ 5%	▼ 1%
Garden features & structures	▼ 8%	▲ 14%	▼ 14%
BBQs and Heating	▼ 22%	▲ 12%	▼ 34%
Garden Furniture	▼ 17%	▲ 11%	▼ 17%

Source: HTA Garden Retail Monitor

Non-Gardening Products

Sales by value; September 2025

Across the non-gardening category, total sales rose by +6% compared to previous years. This sales growth is broadly replicated across non-gardening sub-categories, with continued sales growth among the indoor living and food & farm shop departments.

Gifting was the best performing non-gardening category relative to September 2024, with sales up +10% in September 2025. Catering and food & farm shop sales also grew steadily, up by +7% from September 2024 and +22% from September 2023.

Despite being well ahead for the year-to-date (+10%), indoor living sales appear to show little sign of slowing down, with a sales value increase of +7% from September 2024, and +14% from September 2023.

Wild bird care sales were also at a three-year high for September, up +3% from 2024 and +4% from 2023. Wild bird care sales have been down for most of the year, with the year-to-date position remaining at -2%. This makes wild bird care the only tracked category that has a negative year-to-date sales position compared to 2024.

Category	Sept 2025 vs 2024	Sept 2025 vs 2024 YTD	Sept 2025 vs 2023
Indoor living & homewares	▲ 7%	▲ 10%	▲ 14%
Gifting	▲ 10%	▲ 9%	▲ 11%
Wild bird care	▲ 3%	▼ 2%	▲ 4%
Pets	▼ 3%	▲ 2%	▼ 2%
Food & farm shop	▲ 7%	▲ 12%	▲ 22%
Catering	▲ 7%	▲ 9%	▲ 22%

Source: HTA Garden Retail Monitor

Category Shares by Value

September 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 to contextualise the change in sales discussed in previous sections, whilst highlighting any short-term changes in customer purchasing behaviour.

September 2025's turnover by product category was largely similar to the previous year. However, live plants, bulbs, and seeds' share of the month's turnover has been falling gradually in recent years, despite strong sales of bulbs and seeds themselves.

Catering remains the second largest category by turnover by a comfortable margin, maintaining the 18% share it held in September 2024. This did not rise substantially in 2025, despite the +7% sales increase, due to strong performance in other departments.

Our 'other non-garden products' category has meanwhile seen its share of the month's turnover increase from 7% in September 2023 to 9% in 2025. This category includes small non-gardening categories that are grouped together, such as books, clothing, children's toys. The growth of this category highlights the increased diversification of garden centre offerings.

Lastly, September is the first month where Christmas product sales make an appearance, comprising 2% of the month's total turnover.

Category	September 2025	September 2024	September 2023
Live plants, bulbs, & seeds	26%	27%	28%
Catering	18%	18%	15%
Garden care & maintenance	9%	9%	10%
Other non-garden products	9%	8%	7%
Homewares & floristry	7%	7%	7%
Food hall & farm shop	6%	6%	5%
Garden containers & structures	6%	7%	7%
Gifting	5%	5%	5%
Wild bird care, pets, & aquatics	4%	5%	5%
Outdoor living	4%	5%	6%
Other garden products	2%	2%	2%
Christmas	2%	2%	2%

Source: HTA Garden Retail Monitor

Year-to-Date Sales

Calendar year to September 2025

For the year to end of September 2025, garden centres' overall sales are 10% ahead of 2024. However, with garden centres typically needing 10-15% sales growth to offset rising operating costs and maintain profit margins, this average performance suggests many centres remain under pressure.

September was a weak month for gardening sales for the second year running. However, as a small proportion of gardening sales occur in September, year-to-end of September sales value remains +9% ahead of 2024 and +4% ahead of 2023.

In contrast, strong non-gardening sales helped to solidify the category's year-

to-date position compared to 2024 and 2023. While catering sales have been strong, other categories have consistently outperformed previous years – particularly food & farm shop and indoor living.

Overall, the year-to-end of September position for non-gardening is +17% ahead of where it was in 2023. When excluding catering, the gap is still substantial at +11%.

As September represents a small share of annual sales, its performance had minimal effect on overall year-to-date sales. However, averages can mask significant variation, and centres performing below 10% growth will likely face continued pressure on their margins.

	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 Sept 2025 vs YTD Sept 2024	▲ 10%	▲ 9%	▲ 9%	▲ 9%	▲ 8%
YTD Sept 2025 vs YTD Sept 2023	▲ 11%	▲ 6%	▲ 4%	▲ 17%	▲ 11%

(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.

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Source: HTA Garden Retail Monitor

National Weather

September 2025 v September 2024

September 2025 saw typical seasonal weather across the UK, following consecutive months of extreme conditions. Although September 2025 was warmer than the previous year, mean temperatures were below the long-term average for the month, bringing an end to the warm spell seen in past months.

Although temperatures were lower than average, the UK saw more sunshine in September 2025, enjoying 18 hours of more sunshine than in September 2024.

Despite increased sunshine, September was slightly wetter than the long-term average for the month, ending the abnormally dry conditions experienced over the summer. The unsettled weather at the end of August was maintained for most of September, although conditions were generally drier towards the end of the month.

Despite the increased rainfall, most regions across England remain in at least prolonged dry weather (PDW). The wet conditions have not been enough to move any regions into recovery. More details on the UK's water situation can be found on page 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.

	September 2025	September 2024
 Mean temperature (°C)	12.8	12.6
 Hours of sunshine	140.3	122.8
 Total Rainfall (mm)	120.1	116.6
 No. of rain days (>1mm/day)	14.9	13.3

Source: MET Office

Regional Weather

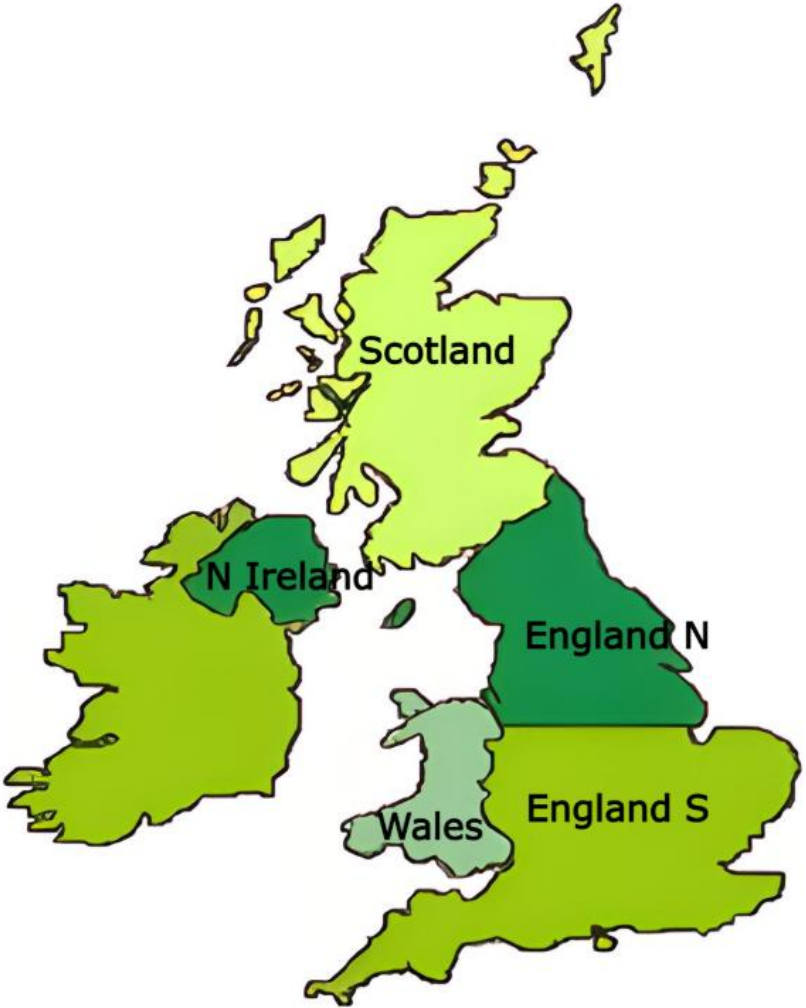
September 2025

UK weather in September 2025 was broadly balanced across regions. Wales saw particularly heavy rainfall relative to other regions, while South England was drier and warmer than the rest of the country.

Similarly to the national weather in September 2025, most regions saw temperatures below and rainfall above their long-term averages for the month.

Despite being the two driest regions in September 2025, both Scotland and South England saw more rainfall than the long-term average for the month. However, for South England, it made a stark contrast with September 2024, which was the region’s wettest September since 1918.

Region	Mean Temp (°C)	Hours of sunshine	Rainfall (mm)	Rain days (> 1mm/day)
Overall	12.8	140.3	120.1	14.9
Scotland	11.3	117.1	125.8	15.5
Northern Ireland	12.2	111.1	144.6	20.2
North England	13.1	141.0	142.5	15.4
South England	14.2	168.3	80.6	12.4
Wales	12.7	127.5	193.7	17.9



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

Source: MET Office

Water Availability

River and Groundwater Levels

Despite the wetter conditions, the Environment Agency's (EA) classification of regions remains unchanged from last month. The Northwest, Yorkshire, and Midlands all remain in drought, with prolonged dry weather (PDW) continuing to affect most of the country. Since last month, Sussex has moved from PDW into drought.

At the end of September, just over half (55%) of river flows were classed as normal, with a third of sites classed as below normal. The East of England was the only region where river flows were classed as exceptionally low, with two sites falling into this category

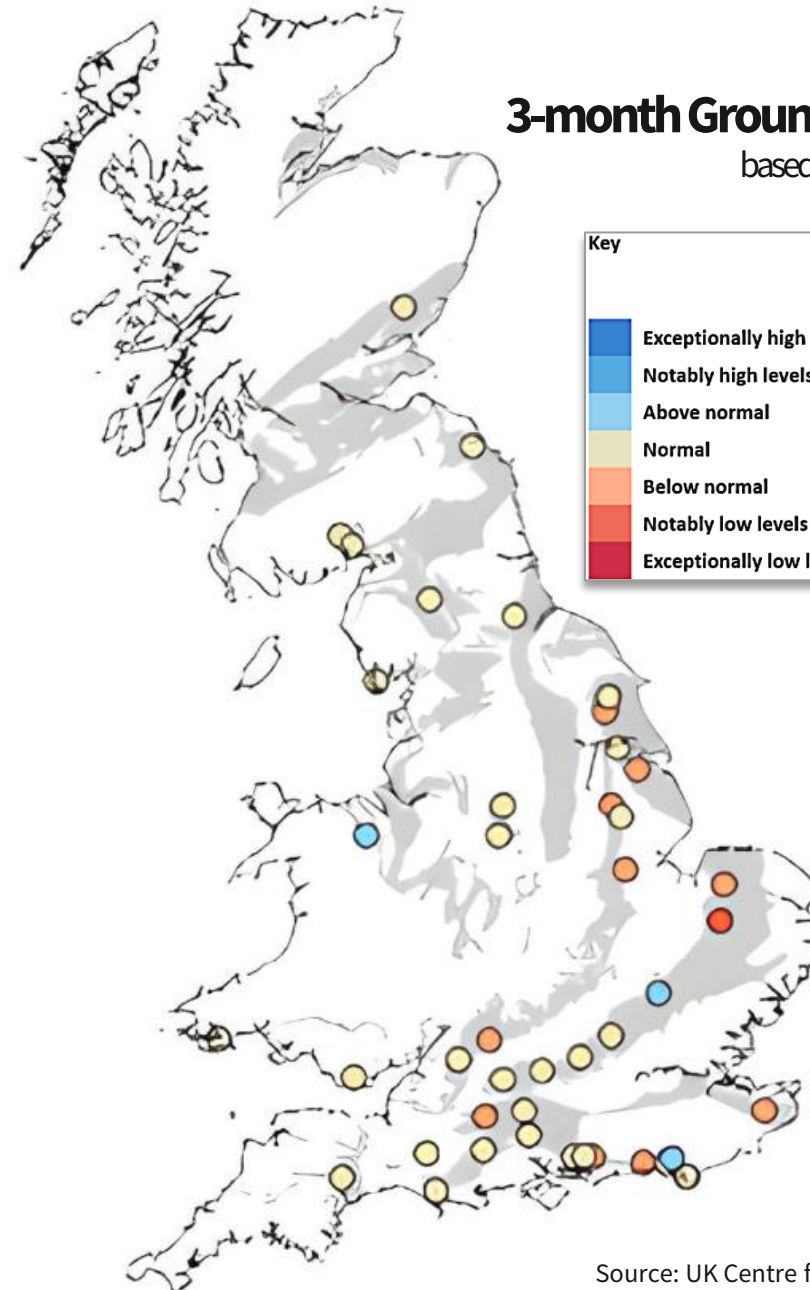
Groundwater levels remain low across the country and continue to recede, as is typical for this time of year. Levels vary regionally between normal and low, with exceptionally low conditions only in East Anglia. However, September's rainfall improved groundwater in some areas, particularly in the North and West, providing softer ground for autumn gardening.

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
(9th October 2025)

Key	Percentile range of historic observed values for relevant month
Exceptionally high levels	> 95
Notably high levels	87-95
Above normal	72-87
Normal	28-72
Below normal	12-28
Notably low levels	5-13
Exceptionally low levels	< 5



Source: UK Centre for Ecology and Hydrology (UKCEH)

Reservoir Levels

England and Wales

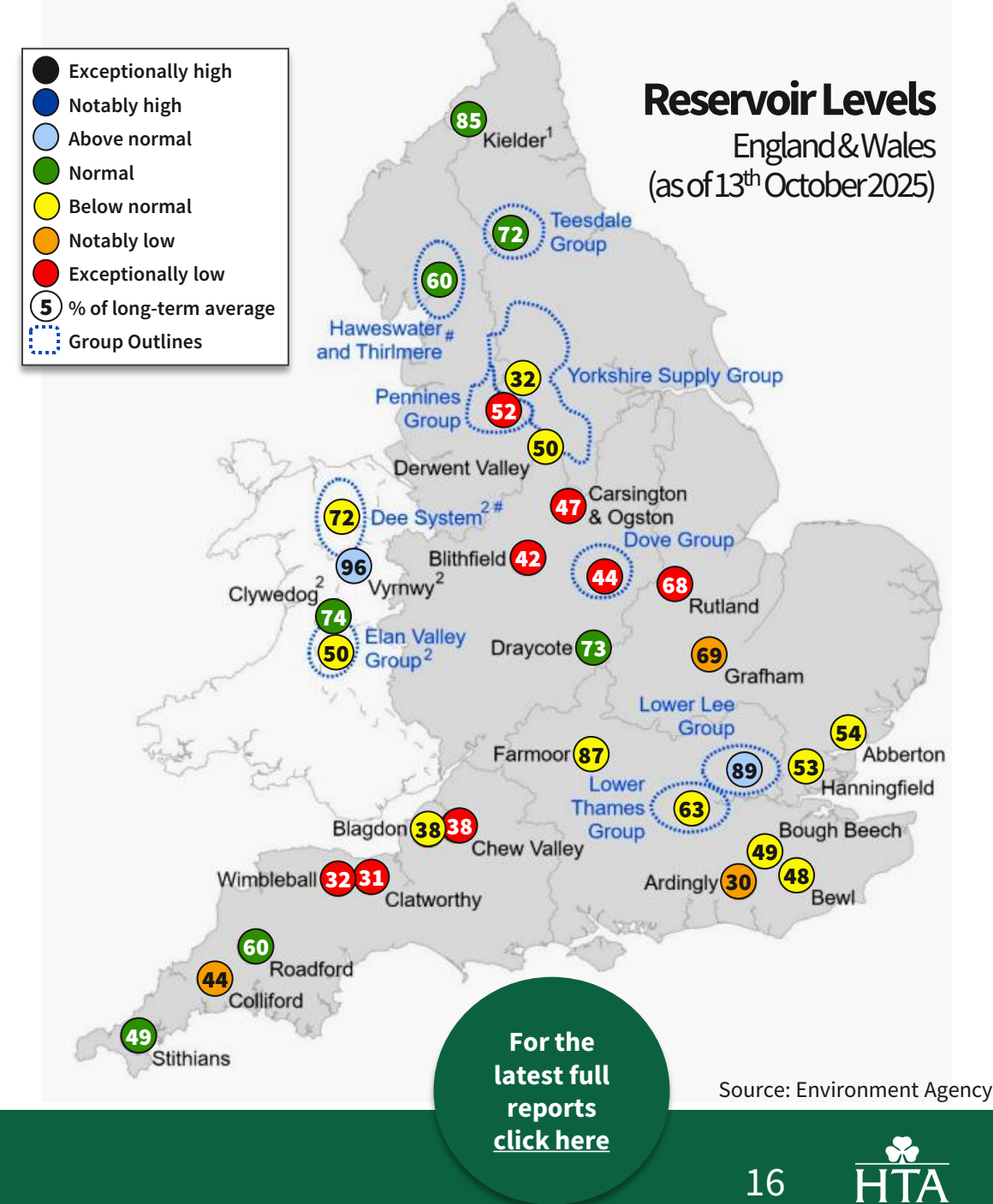
Although September's rainfall had little impact on replenishing groundwater levels, public reservoir stocks recovered throughout the month, with water stored rising from 56% to 64% of capacity.

Despite the short-term recovery for public water supply, existing temporary use bans (TUBs) are expected to remain in place until the end of the year. Existing TUBs are held by Yorkshire Water, South East Water, Thames Water, and Southern Water.

Regionally, the Pennine and Yorkshire reservoirs recovered substantially throughout the month, stabilising at around 50% capacity following Storm Amy. However, this remains well below the average for this time of year. Meanwhile, the Ardingly reservoir in the South-East is now at very low levels, with only 23% of capacity remaining. Consequently, on October 10th, South East Water declared the Sussex area as being in drought.

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

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



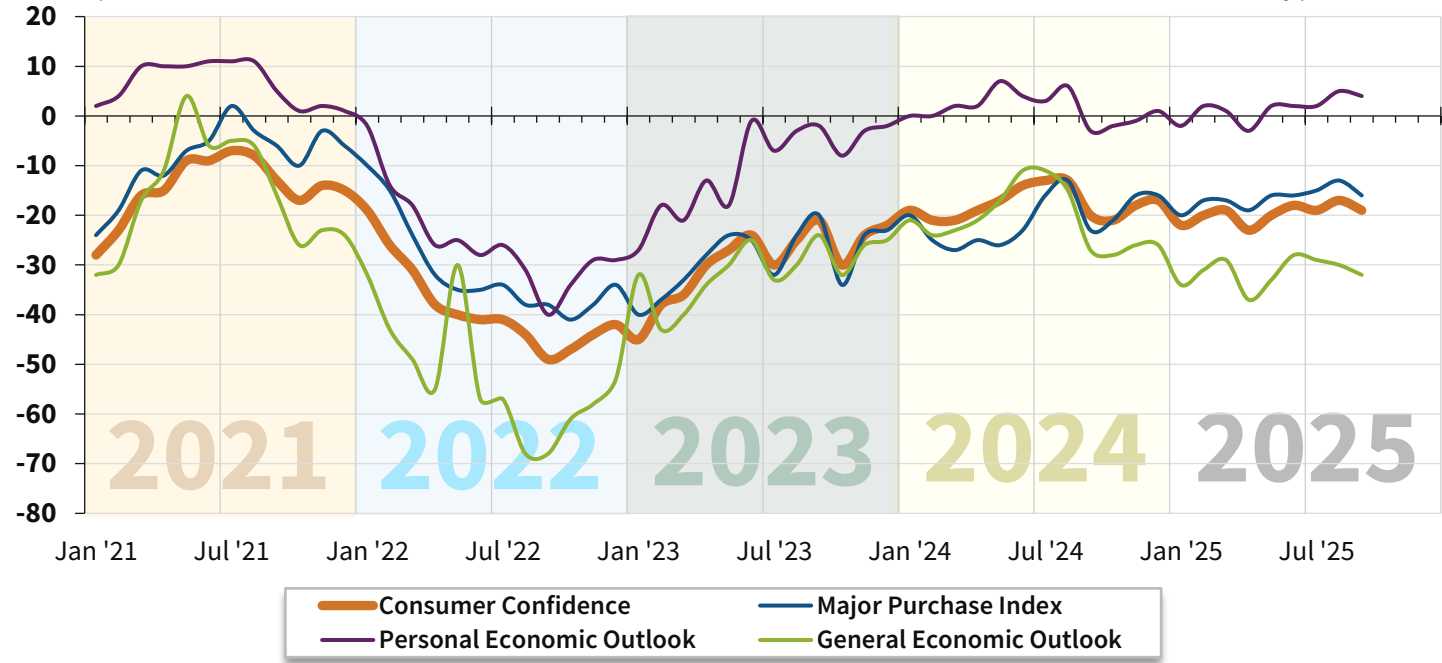
Consumer Confidence

Overall consumer confidence fell by 2pts in September 2025, with all measures falling relative to August. Confidence continues to track within a low and narrow range, with all monthly overall scores sat within a 6pt range (-23 to -17) since August 2024.

Consumer outlooks on the economy in general over the next 12 months fell by 2pts in September 2025, a third consecutive monthly fall. Meanwhile, consumers' perceptions of their personal finances in the next 12 months also fell by 1pt to 4 overall. However, this up by 7pts compared to the previous year (September 2024).

The Major Purchase Index (MPI) also fell by 3pts to -16 overall, following July's score of -14 which was the highest score since the start of the cost-of-living crisis. This suggest that consumer's view on whether now is a good time to make large one-off purchases has reduced slightly.

Meanwhile, the Savings Index fell 8 points, indicating that consumers feel as though now is not as good of a time to save their money. It is likely that inflation levels are a contributing factor, as rising costs mean that consumers will be saving less of their income. However, this brings the Savings Index back to typical levels, following an exceptional 13pt increase a few months ago.



Measure	Relative score (Sept. 2025)	vs Aug 2025
Overall Consumer Confidence	-19	▼ 2
Personal financial outlook (next 12 months)	4	▼ 1
General economic outlook (next 12 months)	-32	▼ 2
Major Purchase Index	-16	▼ 3
Savings Index	22	▼ 8

The middle three measures in the table make up the overall index score. The Savings Index is independent and indicates whether consumers are looking to save rather than spend their money. **Relative scores are given as a comparative to when records began in 1974.**

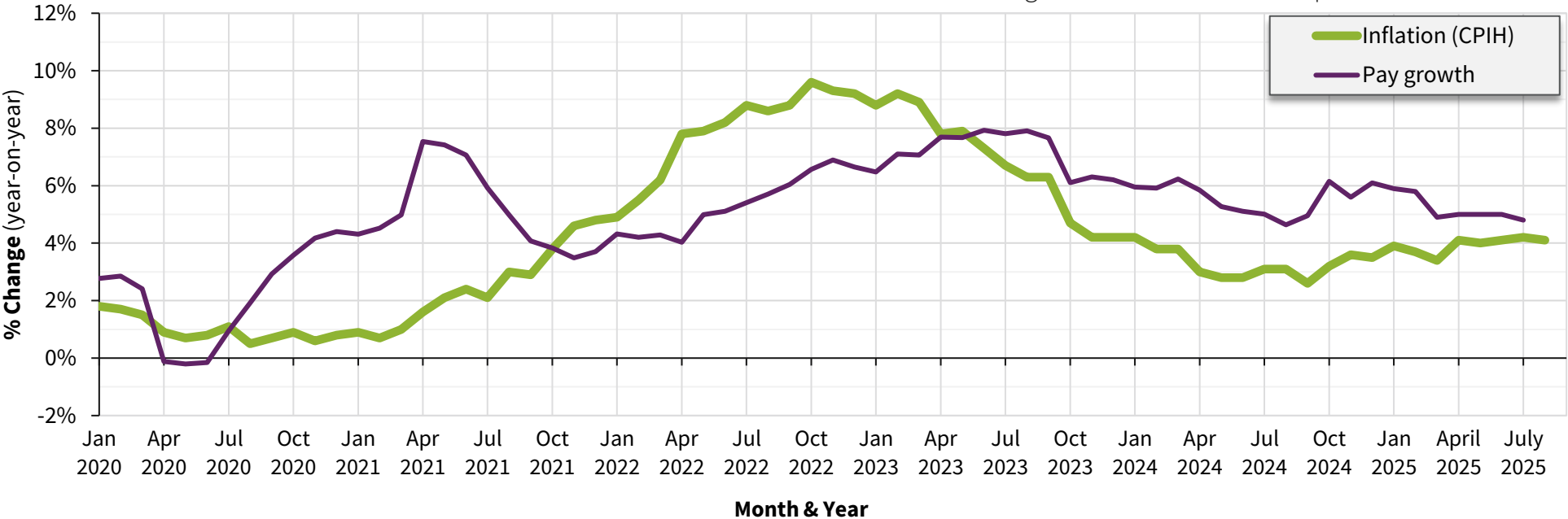
Inflation and Wages

Inflation (CPIH) fell by -0.1% to 4.1% overall in August 2025, following July's CPIH reaching its highest level since the start of 2024.

Despite the fall in inflation, regular pay growth continues to be squeezed, as average weekly earnings rose by 4.8% year – down - 0.2% on the previous month. This put pay growth only +0.6% ahead of inflation, the smallest gap between the two since May 2023.

Meanwhile, the unemployment rate for May-July remained stable on the previous quarter at 4.7%. However, this is the highest level of unemployment since the pandemic, 0.5% higher than it was in May-July 2024.

Combined with the consumer outlooks, the UK economy remains in a precarious position, with the OECD predicting UK inflation to remain higher than all other G7 nations up to the end of 2025. This means that prices will continue increasing at a high rate, and household budgets will continue to be squeezed.



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

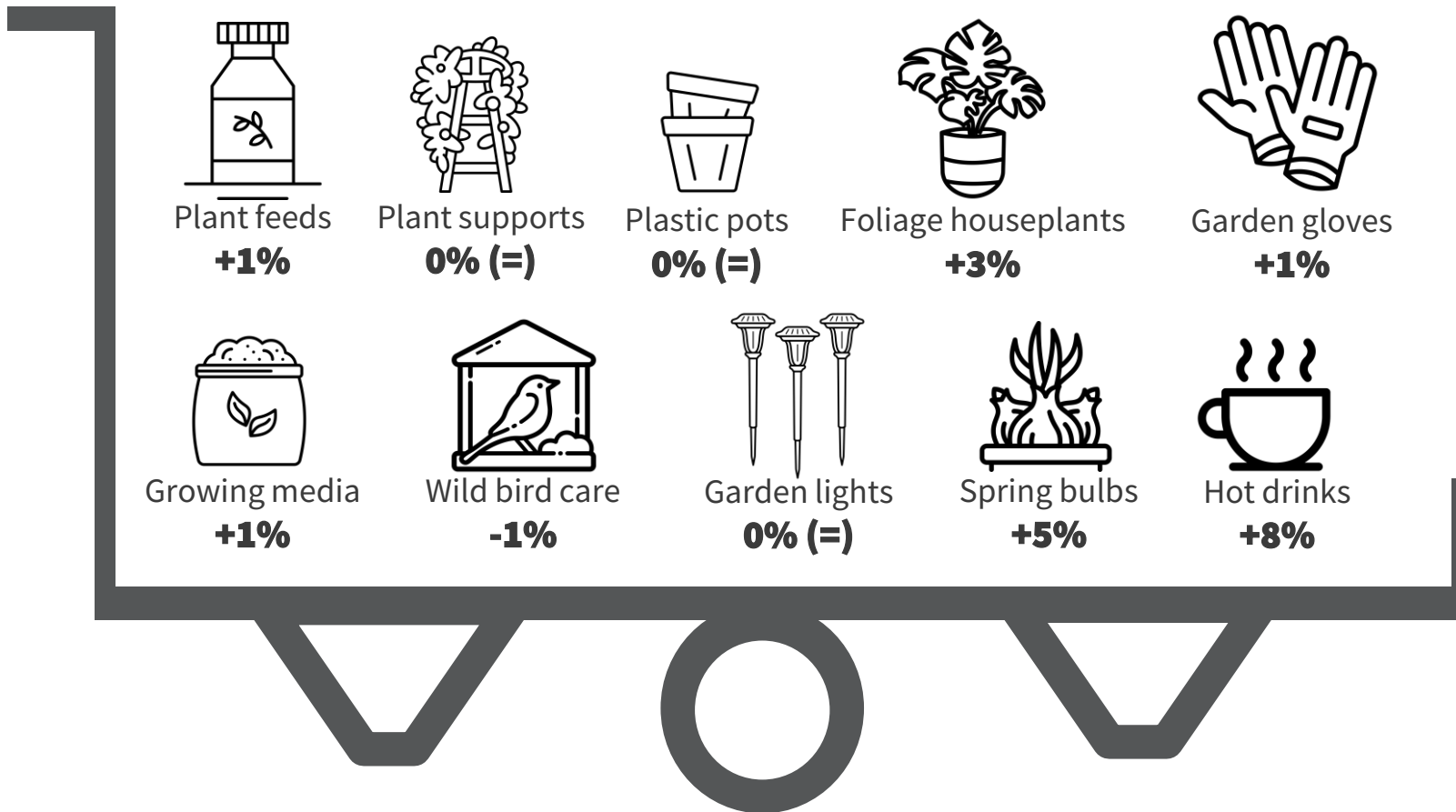
Regular
pay growth
(May-Jul 2025)
= **4.8%**

Unemployment
Rate
(May-Jul 2025)
= **4.7%**

Source: Office for National Statistics

Retail Inflation

September 2025 v September 2024



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

Price inflation of hot drinks remained high in September 2025, up +8% on the previous year, and consistent with recent months.

Meanwhile, most product category prices tracked flat or marginally above September 2024, well below inflation. Plant feeds, growing media, plant supports, plastic pots, garden lights, and garden gloves were all broadly level in price with September 2024.

Spring bulb prices were up +5% compared to September 2024 – an increase broadly inline with inflation. Foliage houseplant prices were slightly below inflation, rising +3% year-on-year.

Source: HTA Garden Retail Monitor

Retail Inflation on Outdoor Plants

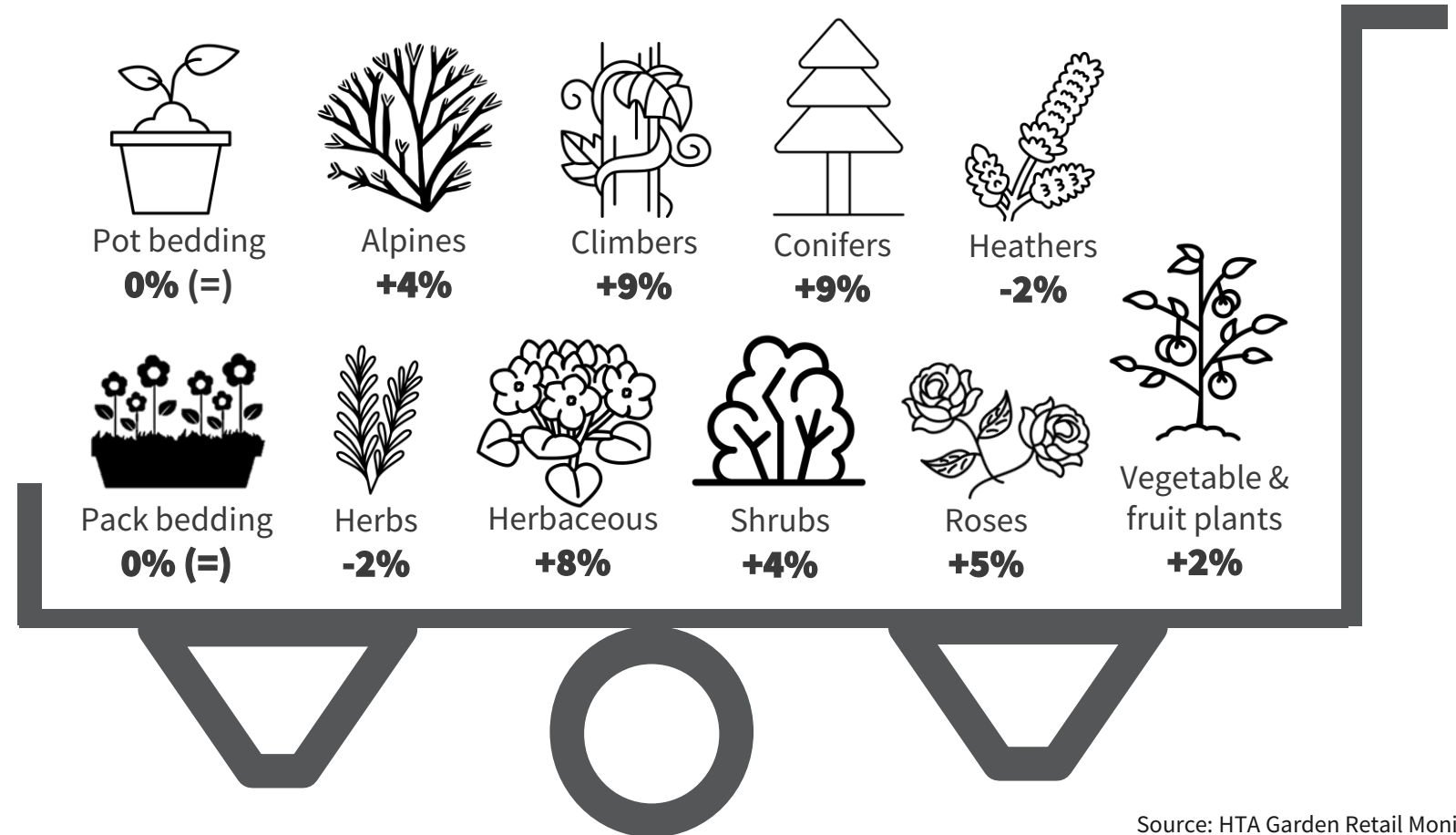
September 2025 v September 2024

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

Similarly to last month, price inflation remains high on herbaceous plants, climbers, and conifers, all tracking well above the CPIH level of 4.1%.

The high price increases on alpiners appears to have fallen back in-line with inflation, although this could be because of multi-buy offers being maximised through the autumn period. Likewise, bedding and heather price changes were substantially below inflation, and are likely to be discounted as part of offers to consumers.

Herb and vegetable & fruit plant prices were also below UK inflation, with seasonal stock continuing to be sold off at lower prices.



Source: HTA Garden Retail Monitor

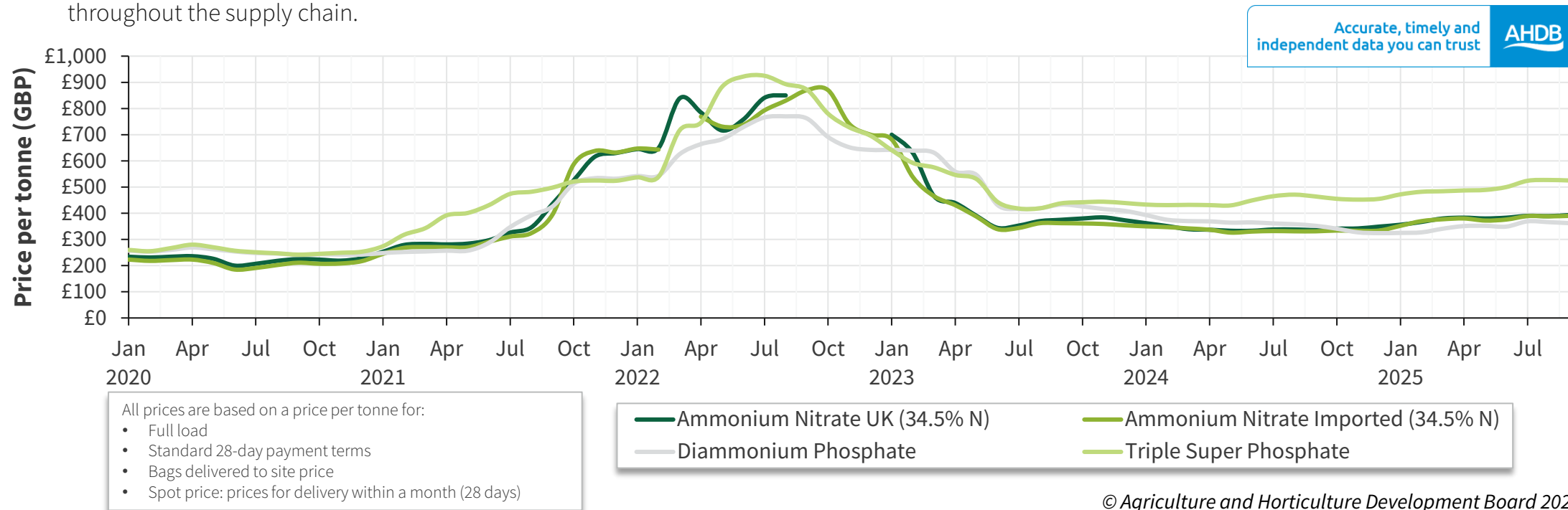
UK Fertiliser Prices

Despite gradual price rises over the past year, the price of fertiliser components remained largely stable in September 2025. However, most components remain around +15% more costly than in September 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 tracked fertiliser components have risen in price, with the lowest increase seen in Muriate of Potash prices (up +2% year-on-year). Other components exhibited greater price increases, with ammonium nitrate prices up +15% and triple super phosphate prices up +13%.

Given the continued upward trajectory of tracker components, fertiliser prices may increase so that producers are able to maintain their profit margins.



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Shipping Container Prices

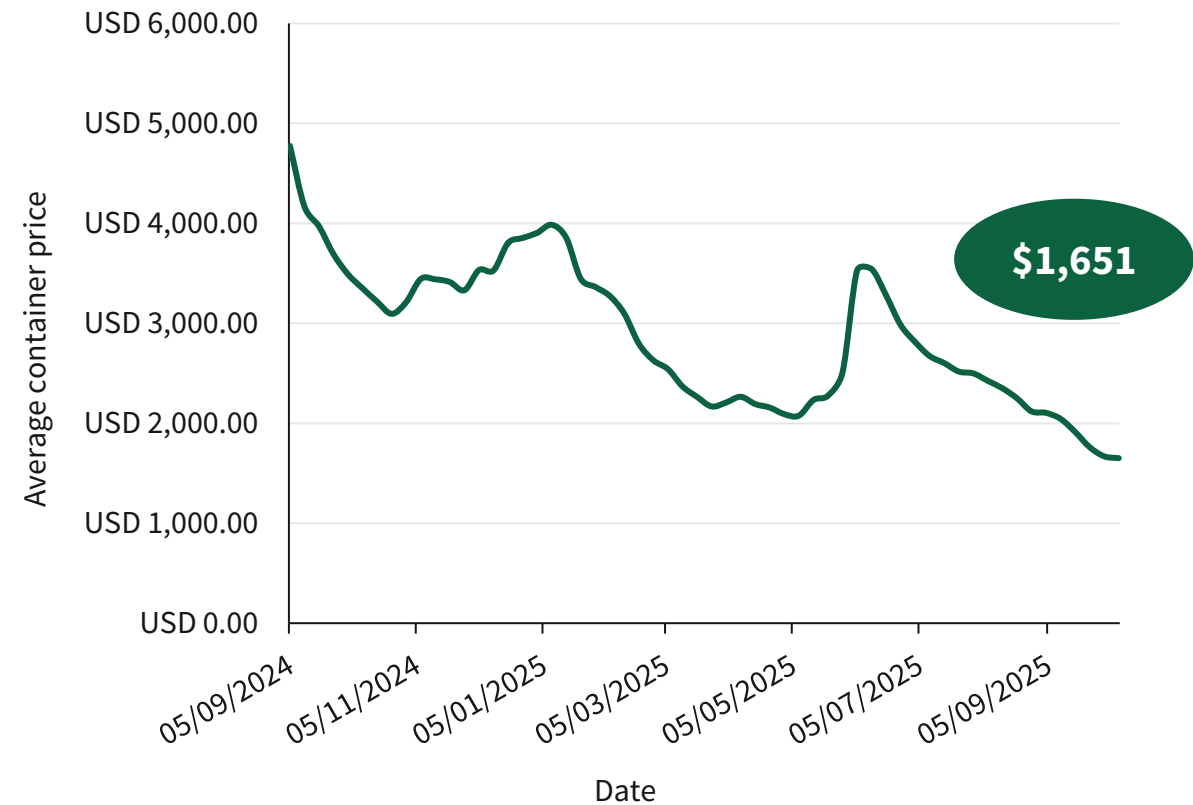
As of October 9th, Drewry's World Container Index (WCI) of shipping container prices has fallen for a 16th consecutive week. Since we published the September edition of Market Update, container prices have fallen by -23%.

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 \$1,651 per 40ft container as of October 9th, 2025, down -51% compared to October 2024.

Although the decline in container prices has slowed this week due to China's Golden Week holiday, the supply-demand balance is expected to continue to weaken over the coming months, and container prices are expected to continue to fall.

The reason for declining container prices is twofold. Firstly, container ships that had been commissioned in recent years have now been added to fleets over the past few months. Secondly, transpacific trade continues to be throttled by Trump's tariffs, meaning that fewer goods are crossing the Pacific and ships are rarely travelling at full capacity. The combination of increased supply and reduced demand has caused prices to fall rapidly.

Drewry World Container Index (WCI)
9th October 2025 (USD/40ft container)



Source: Drewry World Container Index (WCI)

Closing Comments

Get in touch

We hope you enjoyed the format and content of October 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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