



The Association of
**Professional
Landscapers**

Business Barometer Q3 2025 (Jul-Sep) Results

November 2025

Summary

- This report presents the findings from our Q3 Business Barometer poll, describing how HTA & APL member businesses fared in Q3 2025.
- Most HTA members met or exceeded their budgeted sales target at the end of Q3 2025 (77%), and 62% were on-par with or ahead of their budgeted profit position.
- Although sales were typically on par or ahead of budget, members' profit relative to set budgets tended to be below target due to higher operating costs. When excluding landscapers and service providers, the net balance of members ahead and behind their budgeted sales was +3%, whereas the net balance for budgeted profit was -12%.
- The net balance between retailers with catering that were ahead sales budgets and behind their sales budgets was +26%; whilst the net balance for profits was -4%. Conversely, retailers without catering had a net balance of -7% for those ahead and behind budgeted sales, and a net of -5% for those ahead and behind budgeted profit.
- In light of squeezed profits, more members are looking to reduce overhead costs. 79% of members who were behind their budgeted profit positions said that they plan to slow or cut investment into their business – a significant increase from previous quarters.
- A majority of members behind their budgeted profits commented that increased costs (National Insurance Contributions, Minimum Wage increase) was a primary factor behind their weaker profit positions. With the 2025 Autumn Budget also on the horizon, this was likely a contributing factor to a fall in short-term outlooks.
- Due to increased costs, business outlooks among HTA members fell from Q2 2025 for the short-, medium-, and long-term, with long term confidence falling from 5.1 to 4.5 since Q2 2025. However, short-term and medium-term outlooks were broadly comparable to what they were in 2024 at the end of Q3.
- APL business outlooks also fell across the board. The average score for short-term outlooks was the lowest for the APL since we started tracking it in Q1 2024, while the medium-term outlook average was the joint-lowest score since the pandemic. Long-term confidence was also muted, with the joint second-lowest score since the pandemic. Although APL members' current lead times indicate a decent availability of work, the expected tax rises in the Autumn Budget may lead to reduced consumer spending, further compounding the current low confidence and cautious spending of consumers.

Read on for all the detail...

Members' Sales & Net Profit Positions

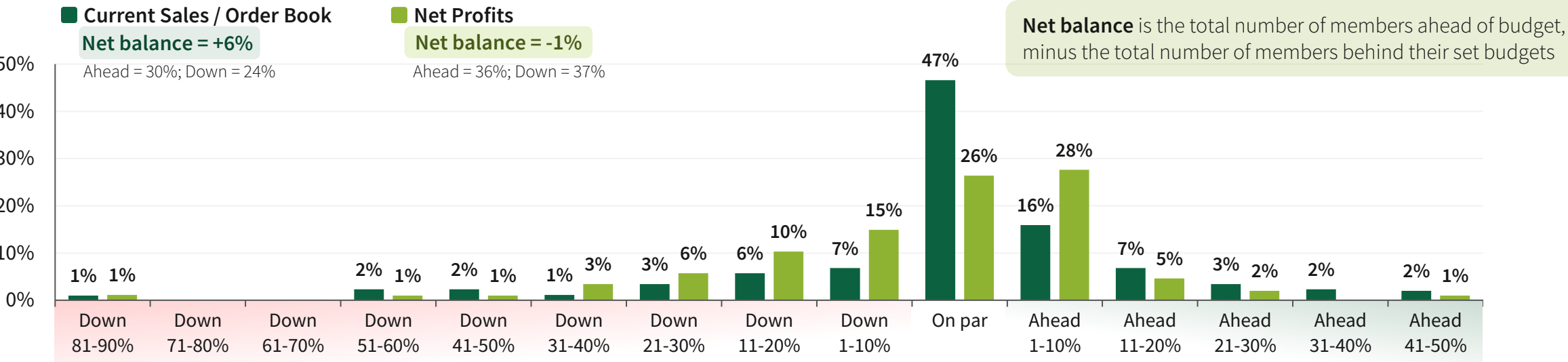
Actual vs Budgeted; Q3 2025

We asked members to what extent they were ahead, behind, or on-par with their expected sales and profit positions at the end of Q3 2025. 77% of respondents said that their sales position was on-par or ahead of their set budget, whilst 62% said that their net profit was ahead or on target.

The net balance (total ahead minus total down) of members ahead and behind their profit target was -1% in Q3 2025, despite most members' achieving their budgeted sales and profit for the end of Q3. Rises to National Insurance and the minimum wage have led to members' profit margins being squeezed, despite moderate sales growth.

When APL landscapers are excluded (see page 4), only 50% of HTA members were meeting or ahead of their net profit target, and 73% were on-par or ahead of their sales budget.

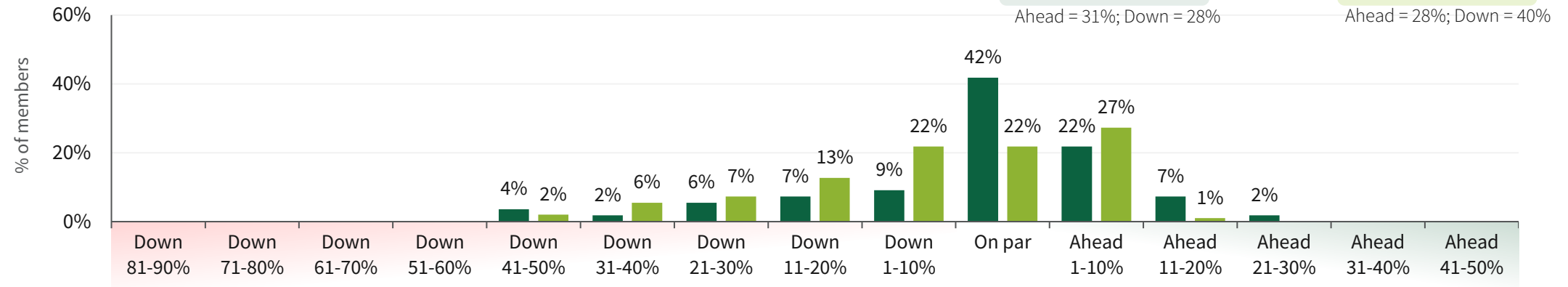
Comparatively, landscapers' sales and profit performances relative to set budgets was much stronger. 85% of landscapers said that they were on par or ahead of their sales budget, and 80% said that they were on-track or ahead of their profit target at the end of Q3 2025. Landscapers appear to have been less-negatively impacted by increases with business costs, possibly due to lower staff headcounts leading to a lower absolute increase in running costs.



Sales & Net Profit by Business Type

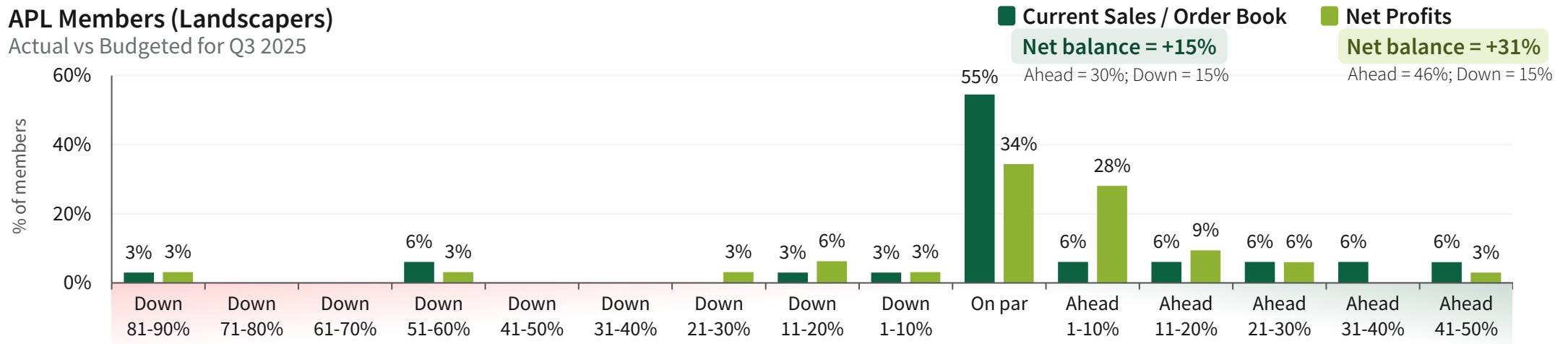
Retailers, Growers, Manufacturers & Suppliers

Actual vs Budgeted for Q3 2025



APL Members (Landscapers)

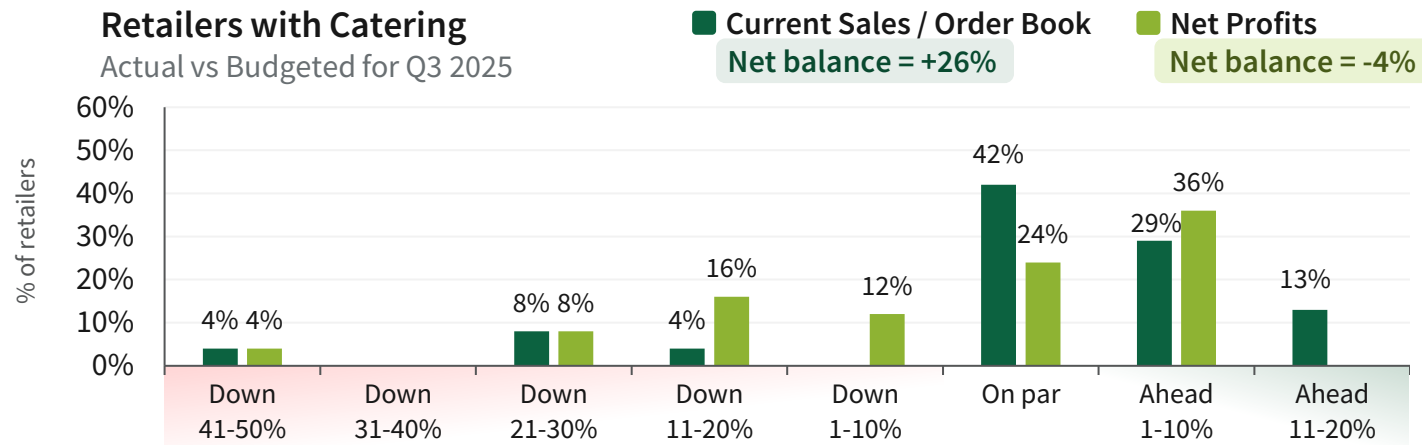
Actual vs Budgeted for Q3 2025



Retailer Sales & Net Profit by Catering Status

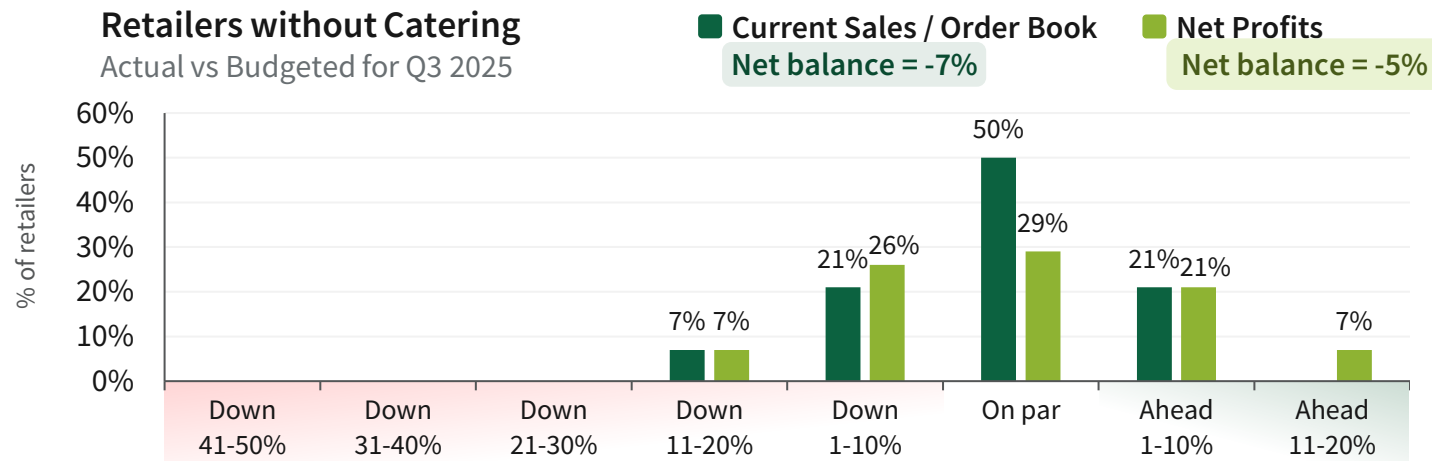
Retailers with Catering

Actual vs Budgeted for Q3 2025



Retailers without Catering

Actual vs Budgeted for Q3 2025



In our latest [Market Update](#) report, we reported that garden centre sales for the year to end of September were up by +10% from the previous year. Here, we look at how retailers have performed relative to their budgeted sales and profit, comparing those with catering against those without.

63% of retailers who shared their sales and profit performance in Q3's poll had a restaurant or café as part of their garden centre.

Most retailers who answered the poll were at least on track or ahead of their targeted sales (84% with catering; 71% without catering) and their target net profit (60% with catering, 57% without catering).

Generally, catering tends to have tighter profit margins than the rest of the garden centre. Retailers with cafes were typically ahead of their sales budget (net = +26%), however their profits tended to be behind budget (net = -4%).

The net balance of profit performance was similar to retailers without cafes (net = -5%), indicating that the overperformance of sales in catering retailers has had minimal impact on profits, likely due to higher business costs further limiting the profitability of catering operations.

Sales & Net Profit by Business Type

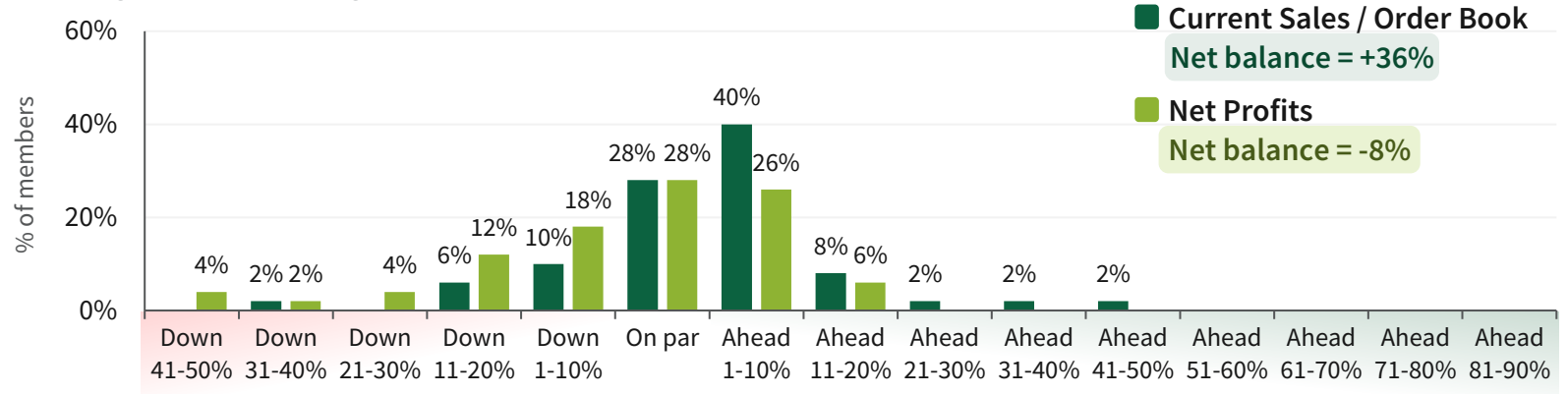
For Q3 2025, HTA also asked members about their sales and profit performance relative to Q3 2024. This helps bring into context how ambitious or cautious members set budgets were for 2025.

Among retailers, growers, manufacturers, and suppliers, profits have clearly been squeezed in 2025. The net balance of members ahead and behind Q3 2024's sales was +36%, whereas the net balance was -8% for profits. This means that despite most members experiencing sales increases, more members have seen profits fall in the last year than those who have seen them increase.

APL landscapers have fared better in terms of profit growth from Q3 2024. The net balance of landscapers ahead and behind sales budgets was +10%, and +12% for profit budgets. This further suggests that the increases to operating costs have impacted other members more than landscapers.

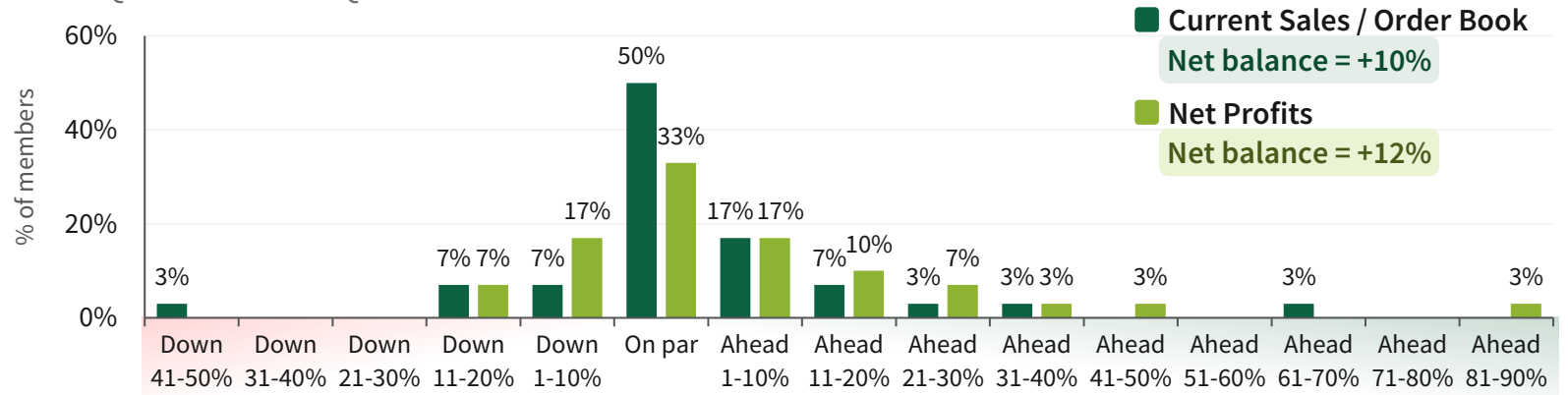
Retailers, Growers, Manufacturers & Suppliers

Actual Q3 2025 vs Actual Q3 2024



APL Members (Landscapers)

Actual Q3 2025 vs Actual Q3 2024



Source: HTA & APL Business Barometer Q3 2025

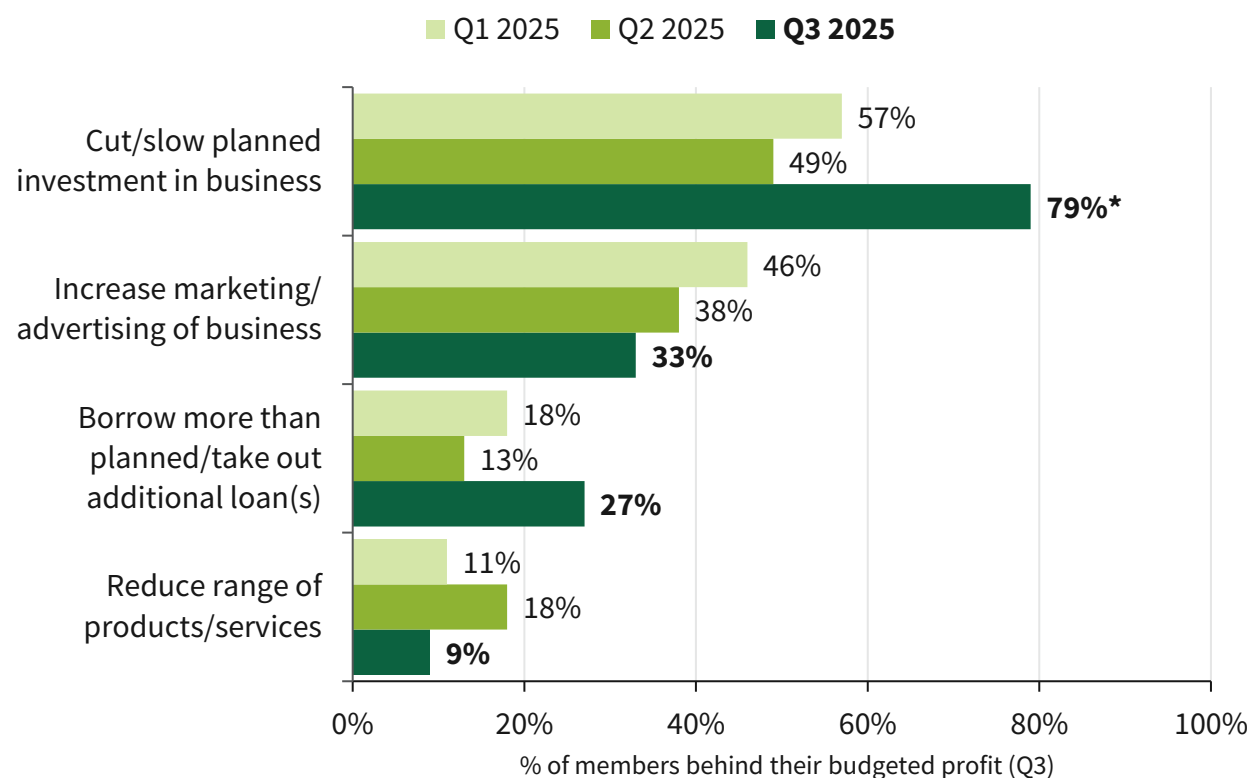
Base: 50 HTA members, & 30 APL members

Net balance calculated by (Total members ahead) – (Total members behind)

Impact of Profit Positions behind Budgets

Planned actions to be taken in the next year

“Is your business likely to be taking any of the following measures as a result of your profit position?”



38% of members who completed the Q3 poll said that they were behind their expected profit position. Of these behind-budgeted-profit members, 79% said that they planned to slow or cut investment into their business.

The increase in the number of members planning to slow investment in their business because of their profit position since Q2 2025 is sizable and significant*. Over half of all members behind their expected profit said that increases to business costs (NICs, minimum wage) were a key factor behind this.

Additionally, 27% of members behind their expected profit said that they planned to increase borrowing in order to cover immediate costs. Although this increase is double Q2 2025's score at face value, the increase is not significant and is within the statistical margin of error.

33% of members behind their budgeted profit said they planned to increase spend on marketing and advertising – a similar response to Q1 and Q2's polls. However, this appears to be on a downward trend across the year. With many members saying that they have to slow investment in the business, this is somewhat expected.

Lastly, 9% of behind-profit members said that they planned to reduce the range of products and services on offer. This is a decrease from Q2 by half, although the fall is once again within the statistical margin of error.

Business Investments

Plans for the next 12 months

74% of members who responded to the Q3 poll said that they “definitely” intended to invest in at least one of the areas listed on the graph.

Page 7 detailed the planned actions of members behind their expected profit, whereas this page covers the investments of all members who responded. Out of all members, 40% indicated that they planned to cut or slow investment into their business, while 12% said they planned to increase borrowing.

Almost half of respondents said that they intended to invest in staff training and skill development – a similar proportion to previous quarters. Investing in staff is commonly the most likely investment that members intend to make.

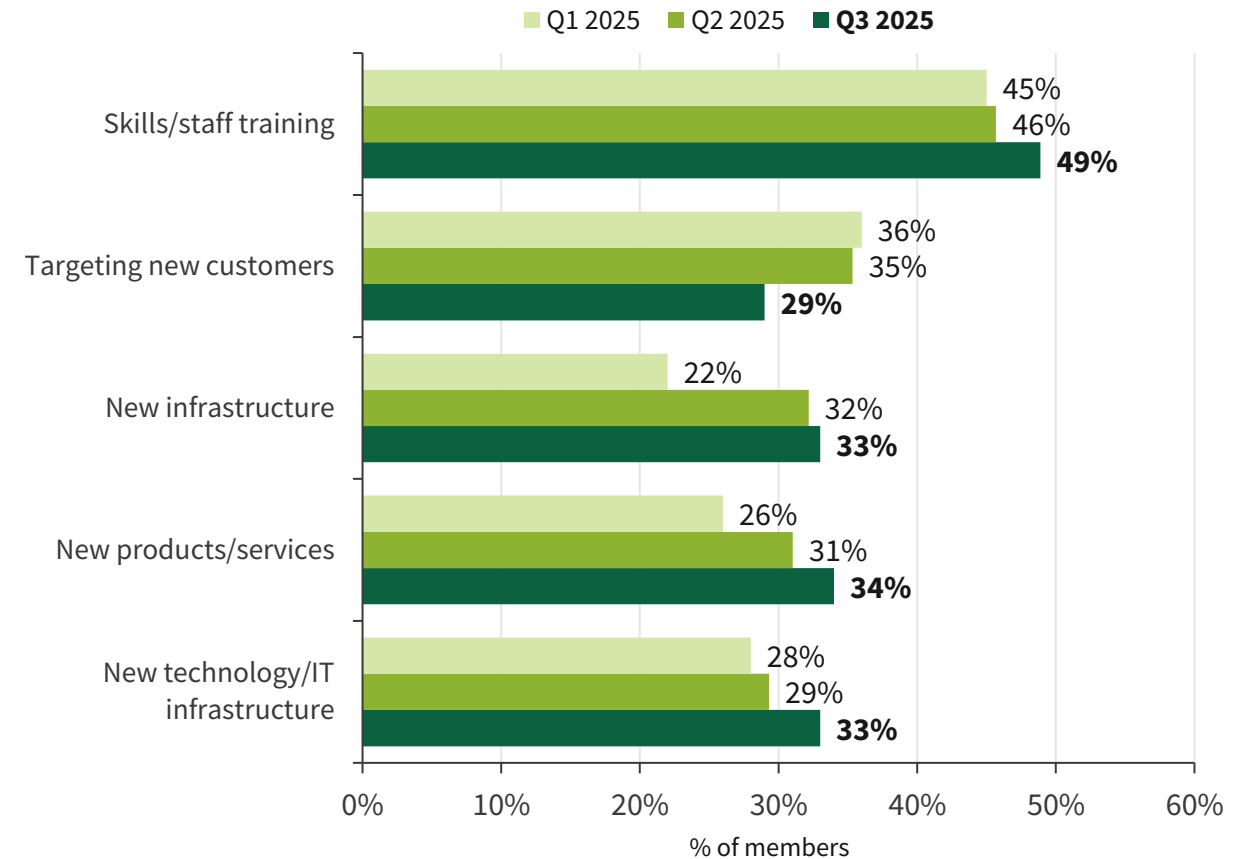
Similar numbers of members intended to invest in new infrastructure (33%), new technology (33%), or new products and/or services (34%). The proportion of members intending to invest in these areas has increased each quarter in 2025, albeit by a marginal amount.

The number of members intending to invest in targeting new customers was 29% in Q3 2025 – lower than in previous quarters, although within the margin of error from previous results.

Despite market conditions and higher business costs, the strong plant sales across Spring 2025 appears to have given members enough headroom to continue investing in their business.

“In the next 12 months, do you think it is that your business will invest in the following areas?”

(% of respondents who answered: “Yes – Definitely”)



HTA Business Outlooks

Retailers, Growers, Manufacturers, Suppliers, and Service Providers

At the end of Q3 2025, the average business outlooks of HTA members' fell across the board for all three timeframes from Q2 2025.

Members were asked to give scores for their business outlooks over the short-, medium- and long-term, ranking their outlooks on a scale of 1 to 7, where 1 = "very negative" and 7 = "very positive".

Long-term outlooks (next 12 months) exhibited the biggest change since Q2 2025, falling from 5.1 to 4.3 on average. Although the fall is not independently statistically significant, the broad downward trend across all three measures supports a fall in business confidence among HTA members.

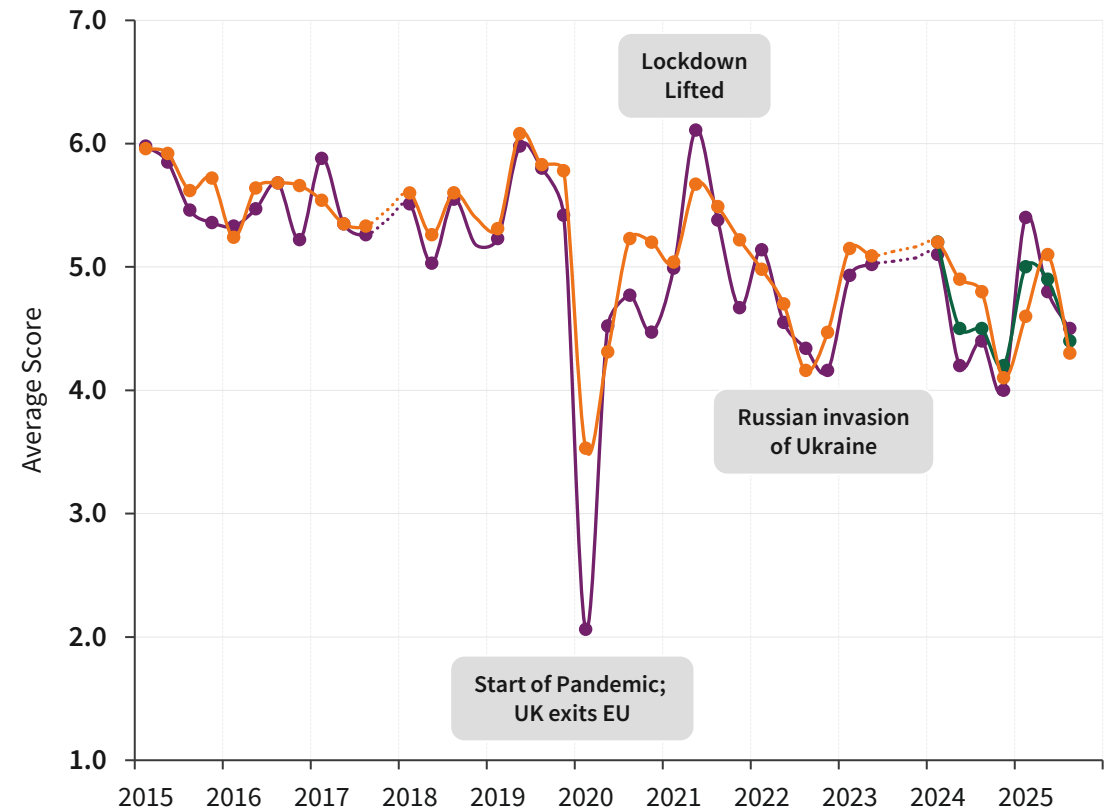
Members' short-term (next 3-months) and medium-term (next 6-months) business outlooks were also down slightly in Q3 2025 from Q2, at 4.5 and 4.4 on average. However, both scores are comparable to what they were this time last year (3-month = 4.4, 6-month = 4.5).

Many members commented on the detrimental effects of 2024's Autumn Budget on their business - particularly on profit margins - while others highlighted the effect of low consumer confidence having affected sales and spending. The upcoming Autumn Budget was also a prominent concern among member comments. Page 12 details some of the HTA's recent and upcoming actions to help support members who are finding conditions particularly challenging.

HTA members' average business outlook

(1 = "Very Negative", 7 = "Very Positive")

- Short-term outlook (3 months) Q3 2025 = 4.5
- Medium-term outlook (6 months) Q3 2025 = 4.4
- Long-term outlook (12 months) Q3 2025 = 4.3



APL Business Outlooks

Landscapers

Compared to the rest of the HTA, APL members had similar business outlooks for all three timeframes at the end of Q3 2025, with all measures falling since Q2 2025. This is particularly striking, given that most APL landscapers met or exceeded their sales and profit targets in Q3 2025.

Historically, APL members have given higher business outlook scores than the rest of HTA membership. However, looking at the graph, landscaper's business outlook scores have generally trended downwards since 2015.

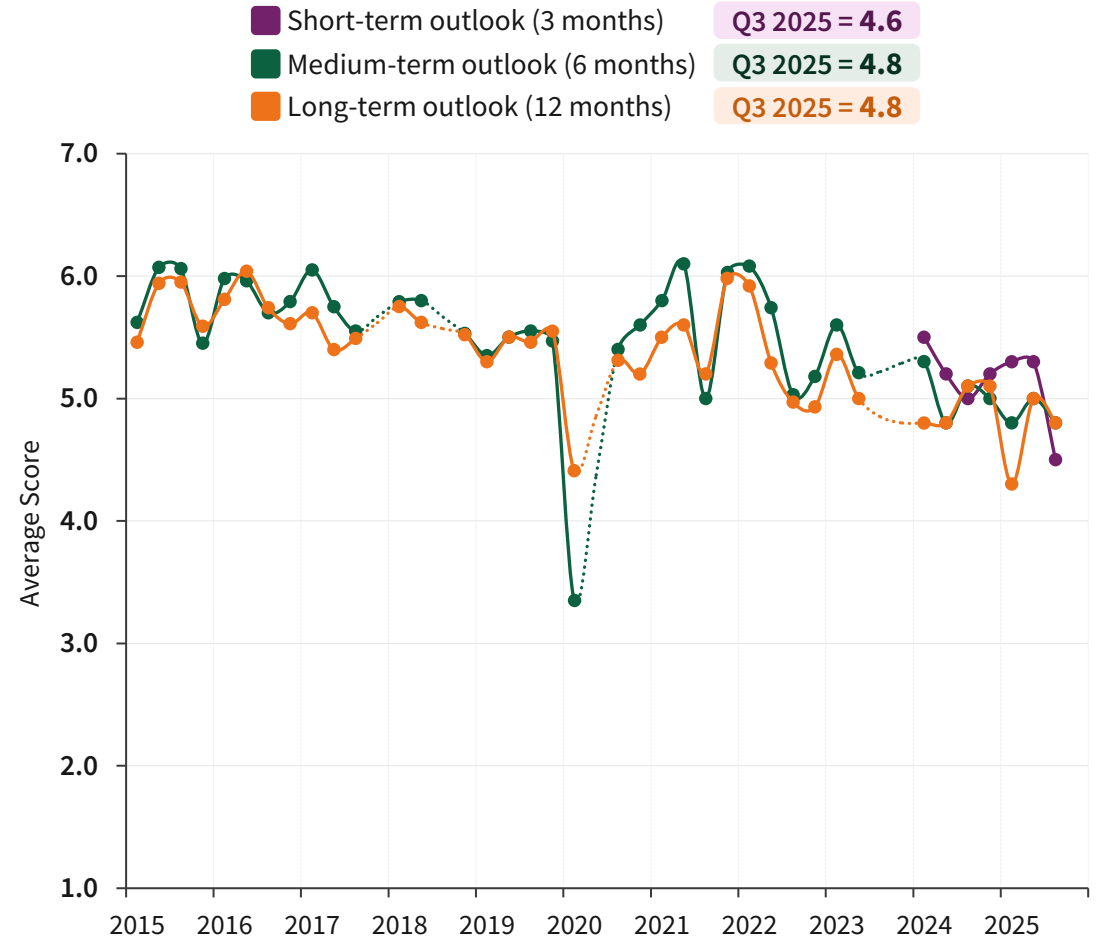
Q3 2025 saw APL members give the lowest short-term outlook score (4.6) since we started tracking the measure in Q1 2024. Moreover, 6-month outlooks were similarly muted with a score of 4.8 – the joint-lowest score for this measure since the start of the pandemic.

Many landscapers cited cautious consumer spending and struggles to converting quotes as having impacted their income and profit performance. The upcoming Autumn Budget, with the anticipated tax rises on consumers, may lead to further consumer caution, hence why short-term outlooks are particularly weak.

Longer-term outlooks were also low, albeit more positive than other HTA members. A score of 4.8 marks the joint-second-lowest average score since the start of the pandemic and is on par with the low 6-month outlook score.

APL members' average business outlook

(1 = "Very Negative", 7 = "Very Positive")



Landscapers' Lead-Time for New Jobs

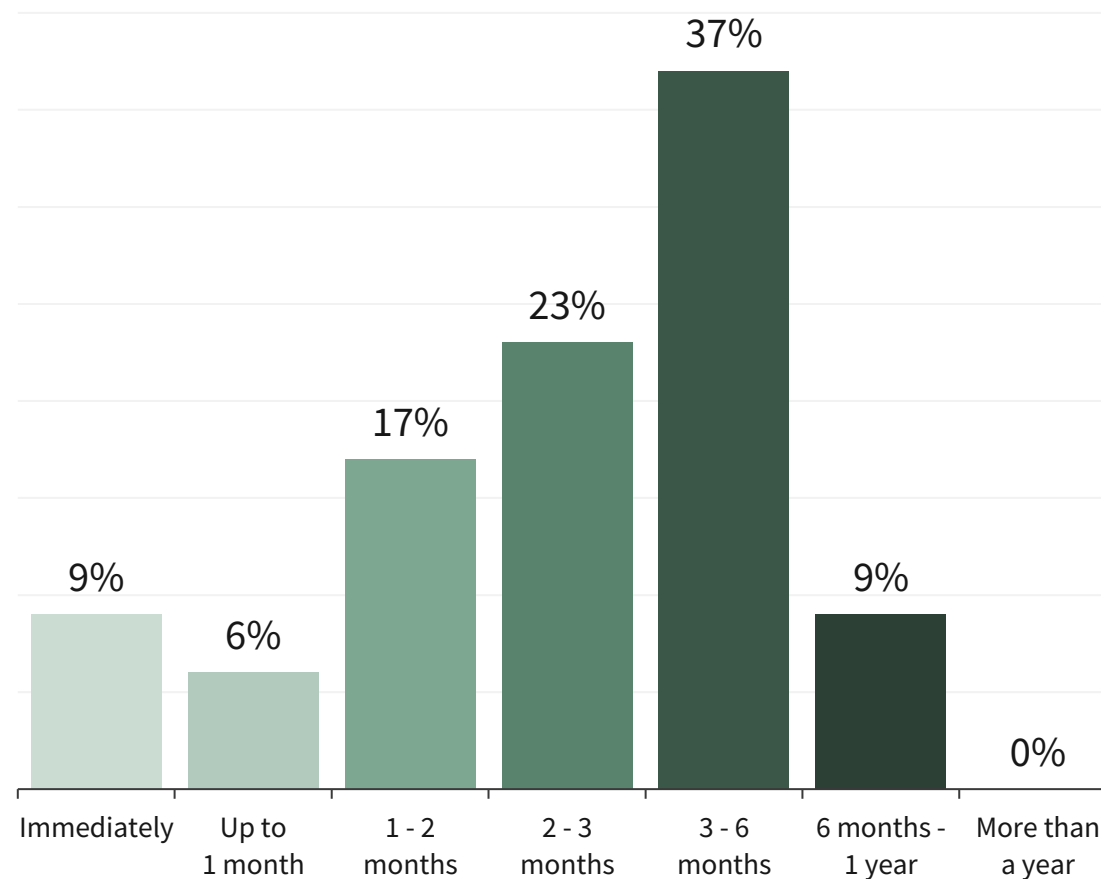
APL Members

At the end of Q3 2025, 69% of landscapers responding to the poll said that they were booked for work for at least the next 2-3 months. Comparatively, 9% of landscapers said that they had space to take on new work immediately.

Since Q2 2025, the percentage of landscapers able to take on more work in the next month fell from 23% to 6%, indicating that demand for work has improved since the summer. This may be a result of seasonal factors, as more consumers going away on holiday over the summer would reduce the overall availability of jobs.

Consequently, the average lead-time has risen for a second consecutive quarter, although this may reflect changes in seasonal demand rather than a change in market conditions.

Most APL landscapers indicated that they are fully booked for work for the coming months, contrasting somewhat with the low short-term outlook score (page 9). However, the profitability of jobs has been put under greater pressure due to higher business costs. The availability of work appears to have improved in the short term, but concerns remain around the upcoming budget and the impact it could have on consumers' willingness to spend on new projects.



Sample Overview

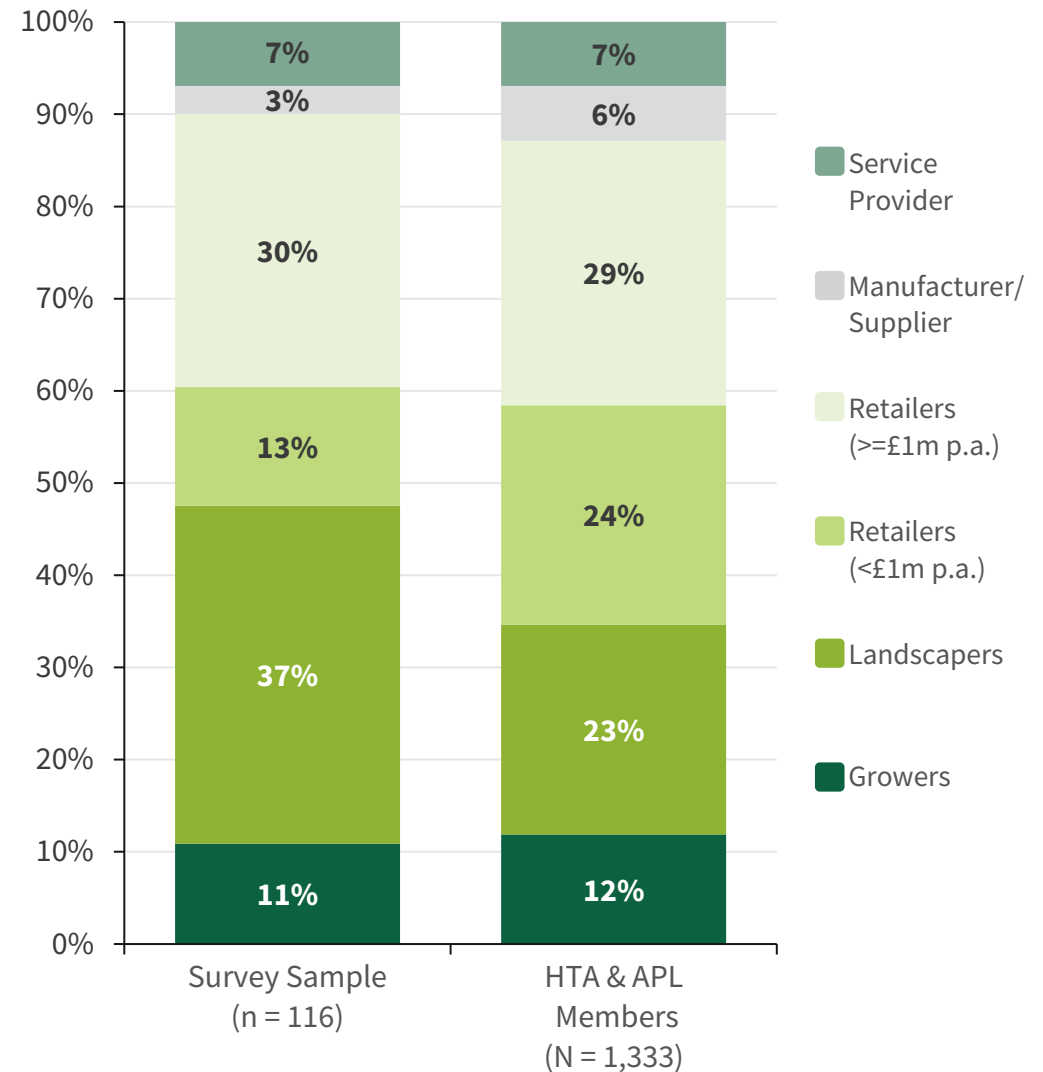
Who participated?

The HTA & APL Business Barometer poll for Q3 2025 received 115 responses from members, equivalent to a response rate of 8%. The proportion of respondents to the poll were broadly representative of the overall HTA membership. Therefore, survey results are robust and should generalise well to the full HTA membership.

Landscapers made up a slightly larger proportion of poll responses with respect to their share of membership, whereas smaller retailers (annual turnover under £1m), and manufacturers were slightly underrepresented in responses – a trend observed across several past polls.

To mitigate the potential consequences of over- and under-representation, findings were split by business type where appropriate and beneficial.

This helps to ensure findings are accurate and representative of the HTA's different membership segments. Due to the smaller sample sizes involved, when results are split by business types, results are more indicative and are less likely to be robust.



HTA Support and Actions

What resources are available to members?

HTA understands the current state of the market poses many challenges for members. Higher business costs from wages and national insurance, continually low consumer confidence, long-lasting water restrictions, and cross-border trade friction are just some of the challenges members face on a daily basis. The below information covers just a few examples of the support that is currently available to members:

The HTA's policy team [submitted our evidence to HM Treasury](#) ahead of this year's Autumn Budget, highlighting the current tax and regulatory pressures affecting member businesses whilst emphasising the value of the environmental horticulture industry to the UK. On December 1st, our [Autumn Budget webinar](#) will break down all the key announcements from November. Members are invited write to their local MP ahead of the Autumn Budget using our [letter template](#). The policy team continue to actively engage with government and host MP visits to member businesses, bringing the sector to the forefront of policymakers' attention.

This work has helped deliver important legislation for the industry, most notably the [common understanding between the UK and EU to implement a SPS \(Sanitary Phytosanitary\) arrangement](#), which will reduce border friction for moving plants and plant products. Until negotiations conclude however, the current status quo remains in place. The policy team's ongoing [Town Halls and surgeries](#) also continue to provide direct support to members, with the most recent webinar having been held on the [upcoming Employment Rights Bill](#).

For APL members, the regular [cluster meetings](#) and member [WhatsApp groups](#) remain vital avenues for APL members looking to access support. The HTA and the APL committee are developing a new research-led consumer marketing strategy for the APL, aiming to promote the APL and its members to prospective clients and highlighting the professional qualities that set apart APL landscapers from the rest of the field.

HTA also launched the [Plant Retail Success initiative](#) in January 2025, bringing together new and existing materials to help support retailers improve commercial performance in the plant area. Resources include consumer insights, and practical guidance, and staff e-learning. The HTA continues to encourage retailers, growers, and manufacturers to maintain active dialogues with one another to work to boost sales for all involved.

Finally, HTA's last [Regional Member Event](#) of the year will be held on November 20th at Bodmin Nursery in the South West, capping off a successful year of events across the country. HTA's Regional Events are free to attend and enable businesses the opportunity to collaborate and share ideas, whilst hearing from industry experts across a wide range of topics. Dates for 2026's Regional Events will be published in due course.

Closing Comments

We hope you enjoyed our State of Trade update covering Q3 2025.

If you have any questions, or would like to see additional information included in future reports, please contact us via:



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