



Market Update

*November 2025*

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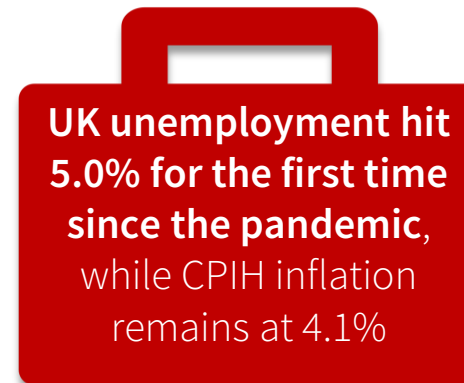
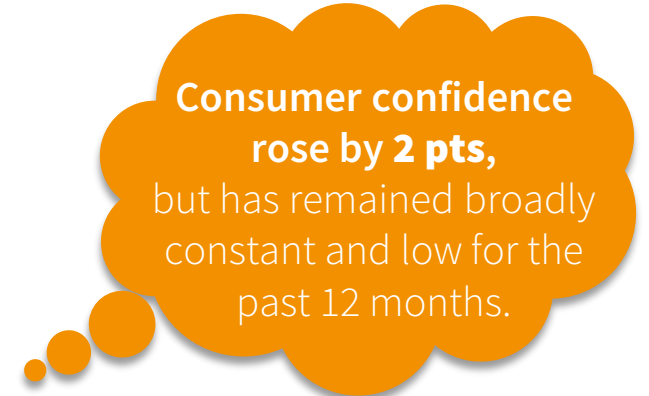
# Overview

- Garden centres saw modest sales growth in October 2025, with **sales up +7% by value from October 2024 and +13% from 2023**; however, higher price inflation of garden centre products means that sales volume growth generally lagged behind.
- **Overall sales volumes were up by +3% from October 2024 and +9% from October 2023.** However, when excluding catering, volumes only rose +1% from October 2024, and +2% from October 2023.
- **Gardening sales value increased by +5% compared to October 2024, although volumes were flat across the same period.** Live plant sales were somewhat reserved compared to previous years, while on the contrary, seeds and bulbs were notably strong.
- Non-gardening sales continue their trend of being ahead of previous years – up +10% from October 2024 and +21% from October 2023. Even when excluding catering, **non-gardening sales recorded sizable gains of +8% and +15% from Octobers 2024 and 2023 respectively.**
- Catering sales were particularly strong, **up +10% from October 2024 and +25% from October 2023.** This was largely a result of greater footfall in garden centres than in previous years, although price increases were also a notable factor behind this growth.
- **October 2025 was the third-dullest October on record**, with the UK receiving average rainfall for this time of year. This led to a slight recovery in public reservoir levels, although groundwater levels continue to recede as is typical for this time of the year.
- The MET Office are currently forecasting that **the November-January period will likely be drier than average**, meaning that the UK's water situation may take longer than previously anticipated to return to normal. HTA continues to monitor the situation closely, representing environmental horticulture on the Environment Agency's National Drought Group
- Consumer confidence remains steady and low, rising +2pts overall since August 2025. The overall UK consumer confidence index has remained between -20pts and -17pts for 6 consecutive months. [\*\*HTA & APL's Q3 2025 Business Barometer\*\*](#) also found that HTA members' business outlooks are similarly in decline. **CPIH inflation remains high at 4.1%, whilst unemployment rates hit 5.0% for the first time since the pandemic.**
- At the end of October 2025, garden centre sales remain in a strong position relative to previous years – up +9% from October 2024 and +10% from October 2023 on average. However, with increases to operating costs having come in earlier this year (minimum wage & national insurance contributions increase), many garden centres are needing sales increases of 10-15% to maintain their profit margins.

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

# Key Points

October 2025



# Garden Centre Sales

## October 2025

**In October 2025, overall sales value increased by +7% in October 2025 from October 2024, and by +13% since October 2023. Growth in sales value was driven increases in total transactions and average transaction values, as highlighted on page 7.**

When catering is excluded, overall sales were still up +7% compared to both October 2023 and 2024.

The value of sold garden/gardening products rose by +5% between October 2025 and October 2024. However, gardening sales value was down by -3% from October 2023. As October is a small month for

gardening, the absolute difference between years is minimal, meaning that the changes in sales value make little impact on the year-to-date sales position of garden products (see page 12). The exceptionally dull weather across October 2025 will neither have helped nor significantly hindered gardening sales.

Non-gardening sales were strong in October 2025, with sales value rising +10% from October 2024 and +21% from October 2023. Catering sales were a significant driver of growth, although when excluded, sales values were still up +8% and +19% respectively.

	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>
October 2025 vs October 2024	▲ 7%	▲ 7%	▲ 5%	▲ 10%	▲ 8%
October 2025 vs October 2023	▲ 13%	▲ 7%	▼ 3%	▲ 21%	▲ 15%

(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. Our GRM is an EPOS-based system where sales data from submitting garden centres are automatically uploaded to a secure server. 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 are interested or looking for more information, please visit:  
[hta.org.uk/grm/](https://hta.org.uk/grm/)



# Garden Centre Sales by Volume

October 2025

While overall sales value increased by +7% from October 2024, sales volumes only increased by +3% in October 2025. Values typically outpaced volumes by a moderate margin, highlighting the consistent impact of inflation on sales growth across departments.

Consequently, increases in sales volume were more reserved than increases to sales value. When excluding catering, volumes were up by only +1% from October 2024, and +2% from October 2023.

Gardening sales volumes were flat from October 2024, and down by -8% compared to October 2023. Gardening sales volumes have trended below 2023 for the past few months, which likely indicates a slowing in demand following the exceptionally strong sales in Spring 2025.

In contrast, non-gardening sales volumes increased by +7% from October 2024, and +17% from October 2023. Excluding catering, volume increases were more reserved, up +3% from October 2024 and +10% from October 2023. Non-gardening continues to make up the difference from weaker garden/gardening sales, as has been the trend in past months.

	October 2025 vs 2024		October 2025 vs 2023	
	Sales Value (£, Exc. VAT)	Sales Volume (n)	Sales Value (£, Exc. VAT)	Sales Volume (n)
Overall <i>Incl. catering</i>	▲ 7%	▲ 3%	▲ 13%	▲ 9%
Overall <i>Excl. catering</i>	▲ 7%	▲ 1%	▲ 7%	▲ 2%
Garden/ gardening	▲ 5%	(=) 0%	▼ 3%	▼ 8%
Non-garden/ gardening <i>Incl. catering</i>	▲ 10%	▲ 7%	▲ 21%	▲ 17%
Non-garden/ gardening <i>Excl. catering</i>	▲ 8%	▲ 3%	▲ 15%	▲ 10%

# Average Transaction Values (ATVs) and Transaction Numbers

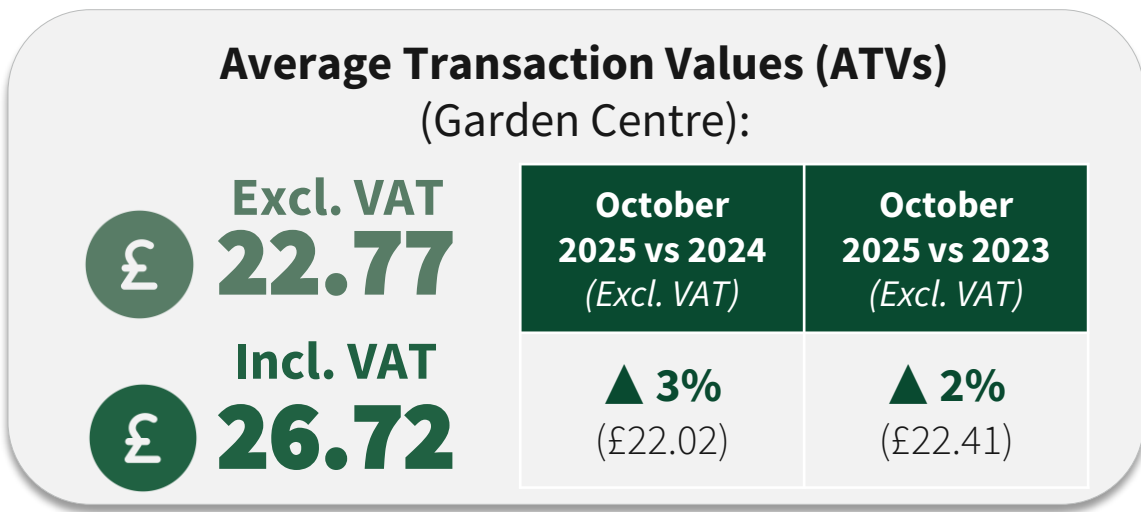
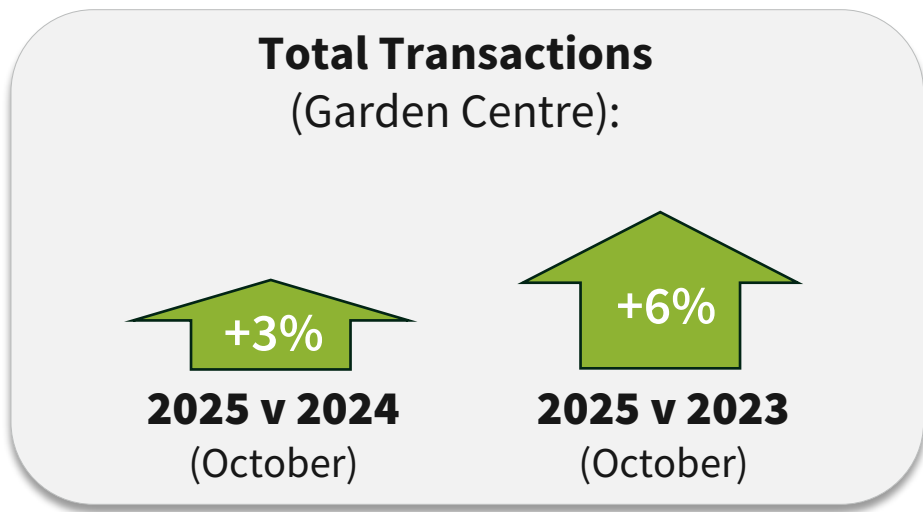
## Garden Centre (excluding café/restaurant); October 2025

Garden centre transaction volume in October 2025 increased by +3% from October 2024, and by +6% from October 2023. Average transaction values also rose, up by +3% from October 2024 and +2% from October 2023.

The increase to the total number of garden centre transactions indicates a growth in garden centre footfall in October 2025, relative to previous years. This suggests that October 2025’s sales growth was partly driven by an increase in customers visiting garden centres, as well as price increases.

Garden centre average transaction values increased to £22.77 in October 2025, up +3% from October 2024 (£22.02) and +2% from October 2023 (£22.41).

However, given the growth in total transactions with respect to overall sales growth and the current rate of inflation, consumer basket sizes were smaller in October 2025 than in 2024 or 2023. This suggests that consumers may be feeling the impact of price increases on their budgets and are purchasing fewer items as a result.



# Average Transaction Values (ATVs) and Transaction Numbers

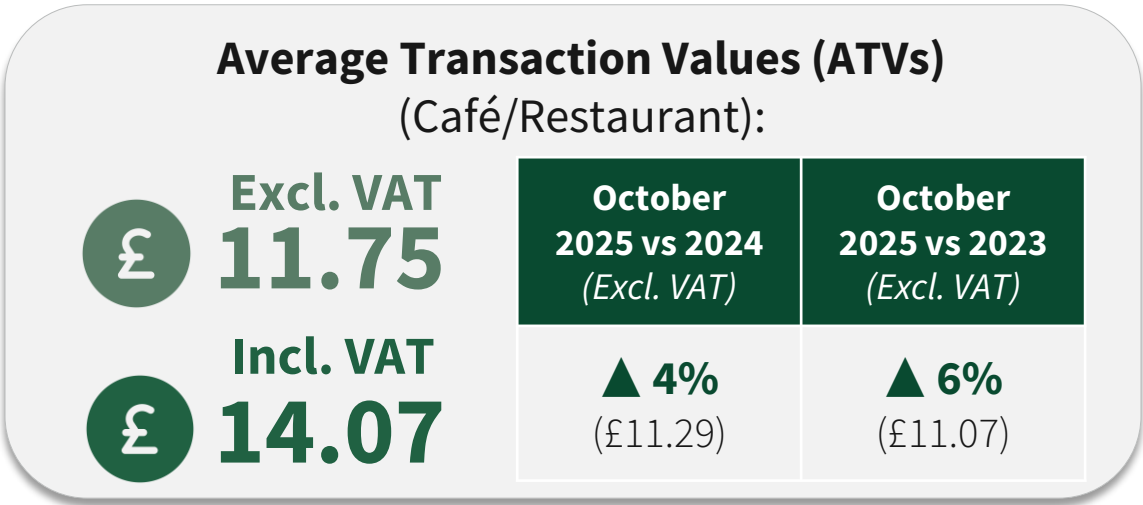
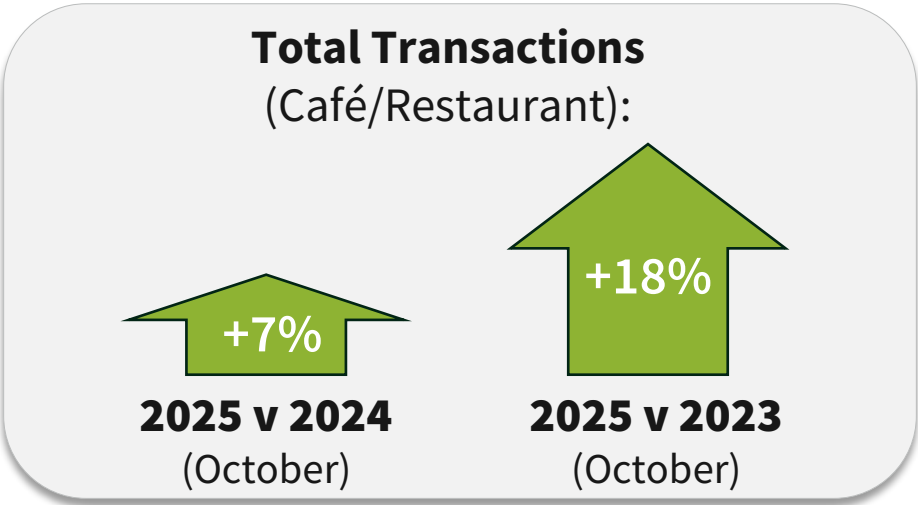
## Café/Restaurant; October 2025

October 2025 was another good month for garden centre cafes and restaurants. Catering sales increased by +10% compared to October 2024, and +25% compared to October 2023, driven by both greater footfall and greater average transaction values.

Total transactions in garden centre cafes and restaurants rose by +7% compared to October 2024, and by +18% compared to October 2023, indicating strong growth in café footfall for consecutive years.

Meanwhile, average transaction values were at a three-year-high in October 2025, up +4% from 2024 and +6% from 2023.

While this contributed to positive growth, we've recorded high inflation among various catering goods for several months. For example, prices of hot drinks remained +8% higher in October 2025 compared to last year. The growth in average transaction value is therefore a product of increased volumes and increased item prices.





# Gardening Products

## Sales by value; October 2025

**October 2025 was a moderate month for gardening product sales. Most categories were up from October 2024, although a majority saw sales value decreases compared to October 2023.**

Sales of live plants were generally mixed. Bedding plant sales were up on previous years, increasing by +7% from October 2024 and +1% from October 2023, possibly supported by the milder weather across the month. However, given the price inflation of some bedding plants (as shown on page 21), sales volumes of bedding plants were down on previous years.

Meanwhile, hardy plant sales were on-par with October 2024, down -11% from October 2023, while indoor plants were down -8% from October 2024, and -5% from October 2024. Consequently, total indoor plant sales for the year-to-end of October in 2025 were -1% behind where it was in 2024.

Seeds and bulbs sales were positive in October 2025, with seeds up +14% and bulbs up +8% from October 2024. Around 23% of annual bulb sales typically occurring in October, so an +8% increase on last year's bulbs sales is particularly noteworthy.

Plant care product sales were also up from October 2024, by +14%, and garden tools sales rose by +3%. This may indicate that more consumers visited garden centres with the mission of tidying preparing their garden ahead of next Spring.

Although changes in sales value by product were more varied in October than in previous months, almost all garden products remain ahead of their sales position for the year-to-end of October 2025, compared to 2024.

Category	October 2025 vs 2024	October YTD 2025 v 2024	October 2025 vs 2023
Bedding & other plants	▲ 7%	▲ 10%	▲ 1%
Hardy plants, shrubs & trees	(=) 0%	▲ 6%	▼ 11%
Indoor plants	▼ 8%	▼ 1%	▼ 5%
Seeds (excl. grass seed)	▲ 14%	▲ 6%	▲ 10%
Bulbs	▲ 8%	▲ 11%	▲ 2%
Plant care products	▲ 14%	▲ 10%	▼ 2%
Garden tools & equipment	▲ 3%	▲ 11%	▼ 8%
Outdoor containers	▼ 2%	▲ 5%	▼ 6%
Garden sundries	▲ 4%	▲ 4%	▼ 1%
Garden features & structures	▼ 2%	▲ 13%	▼ 9%
BBQs and Heating	▼ 5%	▲ 3%	▼ 18%
Garden Furniture	▼ 10%	▲ 12%	▲ 7%

# Non-Gardening Products

## Sales by value; October 2025

**Overall, non-gardening sales rose by +10% between October 2025 and October 2024. Catering sales were a strong driver behind this growth, although all departments recorded sales value increases from October 2024.**

Catering sales rose by +10% from October 2024, and +25% from October 2023. Christmas sales mirrored the sales trend, with sales up +8% from October 2024 and +25% from October 2023. As shown on page 11, Christmas sales have become increasingly prevalent in garden centres' October sales as the fourth-largest category.

Food and farm shop sales were also strong, up +10% and +18% from October 2024 and October 2023. Gifting also posted sales increases of +7% and +8% respectively. Indoor living sales were slower, increasing by +1% from October 2024 and +4% from October 2023.

Wild bird care sales saw a sales increase from 2024 for a consecutive month, up +4% from October 2024. However, this was not enough to overturn the direction of this year's sales, with the year-to-end of October 2025 position remaining at -3% overall.

Category	October 2025 vs 2024	October YTD 2025 v 2024	October 2025 vs 2023
Catering	▲ 10%	▲ 10%	▲ 25%
Christmas	▲ 8%	▲ 10%	▲ 25%
Food & farm shop	▲ 10%	▲ 13%	▲ 18%
Indoor living & homewares	▲ 1%	▲ 6%	▲ 4%
Wild bird care	▲ 4%	▼ 3%	▼ 3%
Pets	▲ 4%	▲ 2%	▼ 3%
Gifting	▲ 7%	▲ 6%	▲ 8%

# Category Shares by Value

## October 2023-2025

Since the start of this year, we have reported 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.

The prevalence of non-gardening categories is notable in October, with 5 out of 6 of the largest categories falling under the non-gardening department. Garden/gardening's share of turnover will continue to fall as Christmas nears.

The share of Octobers' turnover held by live plants, bulbs, and seeds has diminished year-on-year since 2023, falling from 21% to 18% of total turnover, highlighting how garden centres diversify their product ranges in the colder and darker months. This fall is also attributable to sales of hardy plants falling or remaining stagnant in October 2025 relative to previous years, as other subcategories (bedding, seeds, bulbs) posted moderate sales growth.

Catering overtook live plants as the largest category in October 2025, holding 19% of October's total turnover. Christmas sales also become more prominent in October, with the category taking up 10% of October 2025's turnover. Meanwhile, food and farm shop sales took up a slightly greater share of turnover in October 2025 than in previous years, rising from 8% to 9%.

Most categories' share of monthly turnover was comparable to previous years, with the relative fall in live plant sales being the only notable short-term trend.

Category	October 2025	October 2024	October 2023
Catering	19%	19%	18%
Live plants, bulbs, & seeds	18%	19%	21%
Other non-garden products	11%	12%	11%
Christmas	10%	10%	9%
Food hall & farm shop	9%	8%	8%
Homewares & floristry	8%	9%	9%
Garden care & maintenance	6%	6%	7%
Gifting	5%	5%	5%
Garden containers & structures	4%	4%	5%
Wild bird care, pets, & aquatics	4%	4%	4%
Other garden products	1%	2%	2%
Outdoor living	1%	2%	1%

# Year-to-Date Sales

## Calendar year to October 2025

**Overall garden centre sales were +9% ahead of 2024 and +10% ahead of 2023 for the year-to-end of October 2025.**

Sales for the year-to-end of October 2025 are largely unchanged from the previous month. This is partially due to the relative size of October to the year so far, although Octobers' changes in sales value also tended to be similar to the overall YTD positions.

When excluding catering, overall sales were still +8% ahead of the calendar year-to-end of October 2024, and +6% ahead of 2023.

Gardening sales remain +9% ahead of the year-to-end of October 2024, and +4% ahead of 2023's sales. Gardening's lead on previous years has been squeezed since the summer – sales for the year-to-end of June 2025 had gardening +15% ahead of 2024 and +10% ahead of 2024 – although this lead is unlikely to diminish much further before the end of 2025.

Non-gardening sales maintained its lead from 2024, up +9% when including catering and +8% when excluding catering. Compared to 2023, non-gardening sales including catering are up +20% for the year-to-date.

	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 October 2025 vs YTD October 2024	▲ 9%	▲ 8%	▲ 9%	▲ 9%	▲ 8%
YTD October 2025 vs YTD October 2023	▲ 10%	▲ 6%	▲ 4%	▲ 20%	▲ 13%

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

### How were these figures calculated?

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# National Weather

## October 2025 v October 2024





**October 2025 was the UK’s third-dullest October since records began in 1910. Nationally, temperatures were broadly level with October 2024 and above the long-term average by +0.6°C.**

The UK only received 63.3 hours of sunshine in October 2025, less than 70% of the long-term average for the month. This was approximately equivalent to only 3 hours of direct sunlight per day on average in October 2025.

Despite the cloudy weather, the UK’s total rainfall was slightly below the long-term average for October. However, there was moderately more rain than in October 2024. Rainfall at the start of October 2025 was caused by Storm Amy, resulting in significant regional variation (see page 14). The absolute number of rain days is down in October 2025 from October 2024, due to heavier rainfall across the month. The warmer and wetter conditions may have positively contributed to plant and bulb sales, providing ideal conditions for planting.

The UK’s water situation remains in the balance, with below average rainfall forecasted up to January 2026. 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.

	October 2025	October 2024	Long-term average (1991-2020)
 Mean temperature (°C)	10.4	10.5	9.8
 Hours of sunshine	63.3	89.2	91.6
 Total Rainfall (mm)	121.1	105.5	123.2
 No. of rain days (>1mm/day)	14.1	14.4	14.9

# Regional Weather

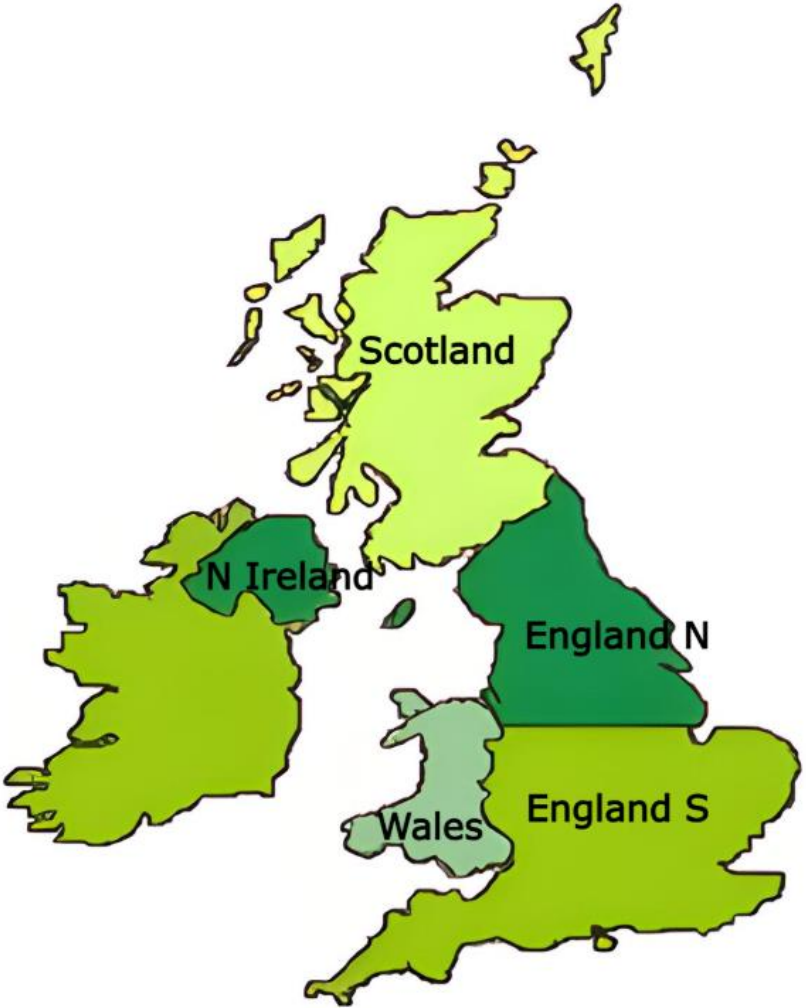
October 2025

The most significant difference in regional weather was total rainfall. Scotland received almost double the total rainfall as the North of England, while the South of England was notably drier.

Temperatures were generally warmer in the South and cooler in the North. However, for all regions, average temperatures were above the long-term average for October.

While October 2025 was exceptionally cloudy, Northern Ireland received the least sunshine, with a total 34.9 hours of sunshine received across the month. England tended to be sunnier, with over 70 hours of sunshine received across the country.

Region	Mean Temp (°C)	Hours of sunshine	Rainfall (mm)	Rain days (> 1mm)
Overall	10.4	63.3	121.1	14.1
Scotland	9.1	56.8	176.6	17.4
Northern Ireland	10.4	34.9	155.5	16.2
North England	10.5	71.7	89.9	12.8
South England	11.6	72.4	76.4	11.0
Wales	10.6	50.9	141.8	15.7



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



# Water Availability

## River and Groundwater Levels

**Following heavier regional rainfall in October, areas in the North-West of England have been moved out of drought status and into recovery. Yorkshire, Midlands, and Sussex remain in drought, with most of the remainder of the UK still in prolonged dry weather (PDW).**

The wetter conditions across October 2025 has resulted in a recovery in river flows at over half of all indicator sites. Only one site was classed as above normal, while two-thirds of sites were classed as normal for this time of year. Three sites were classed as notably low – all in the East of England.

Groundwater levels continue to recede in typical fashion for this point of the year. Around 40% of indicator sites were classed as normal, with most sites currently at below normal or notably low levels. Hampshire and Sussex were the only regions classed as having exceptionally low groundwater levels.

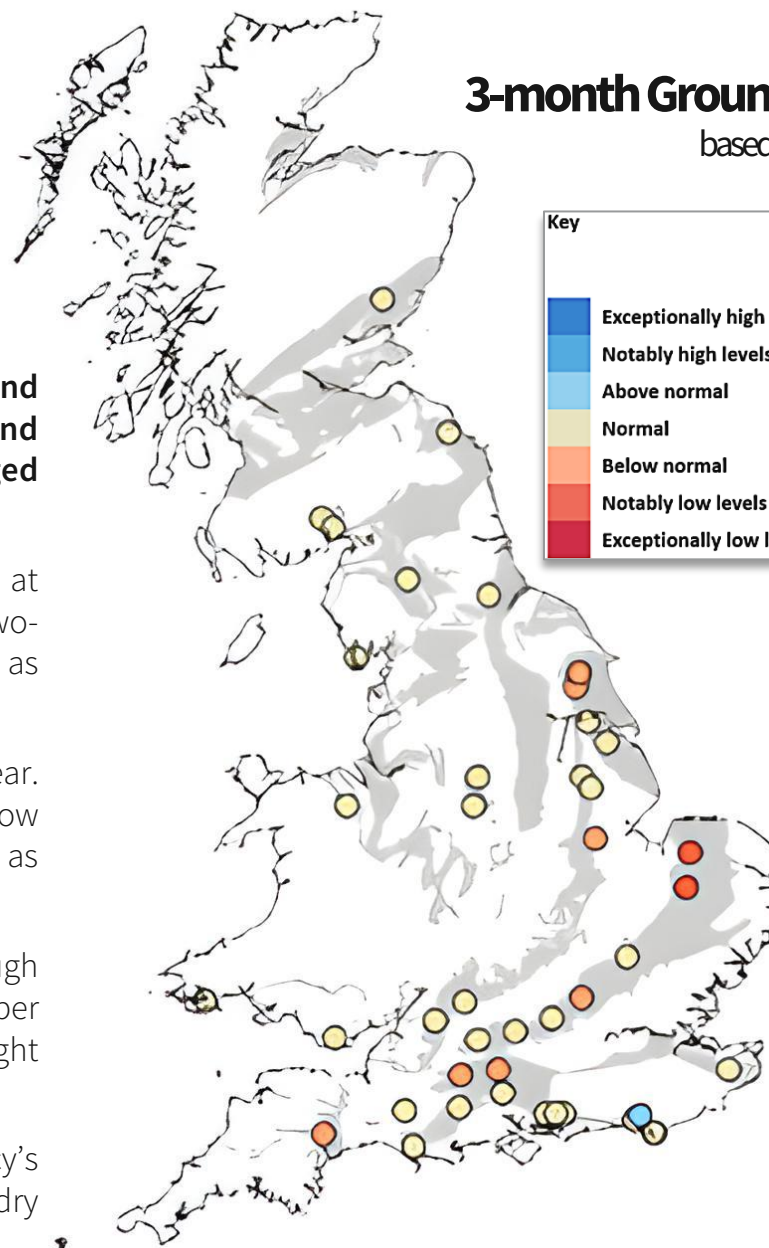
November 2025 has started with generally wet weather across the country, although drier- and colder-than average conditions are currently being forecast for mid-November to January. Therefore, there is a real possibility that some regions may remain in drought by March 2026.

The HTA continues to represent environmental 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  
(11<sup>th</sup> November 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



# Reservoir Levels

## England and Wales

England and Wales' overall reservoir capacity increased slightly from October 2025, with an average storage capacity of 65%. However, this remains some way below the long-term average for October at 77%.

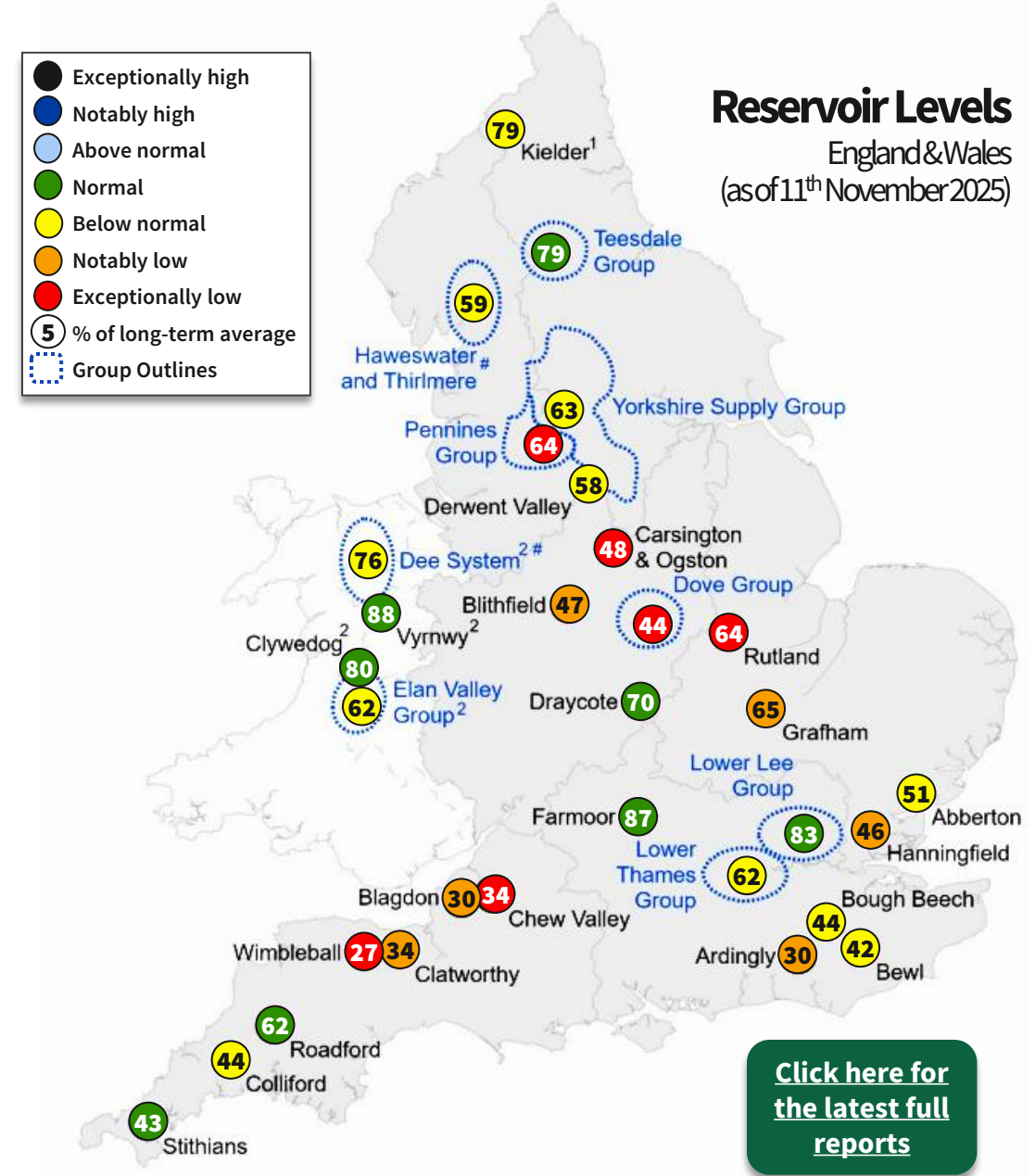
Several Temporary Use Bans (TUBs) remain in place across the South of England and Yorkshire. These will be lifted once reservoir stocks have replenished.

As mentioned on page 15, drier-than-average conditions are expected up to January 2026. This means that some TUBs could remain in force over the winter and possibly into Spring. If rainfall in Spring 2026 is similar to Spring 2025, there is a chance more TUBs could be implemented before March 2026.

The situation in Sussex has improved slightly, following South East Water's declaration of drought last month, with the Ardingly reservoir having recovered from 23% to 30% of capacity. The Yorkshire reservoirs also continue to recover following exceptionally low levels, with storage volumes increasing by 16% in the Yorkshire Supply Group and 13% in the Pennines.

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

**In October 2025, consumer confidence rose by +2pts from September 2025's score, to -17pts overall. While this is the joint highest score of 2025, the overall index has now tracked between -20pts and -17pts for the past 6 months, indicating little change to consumers' cautious outlooks.**

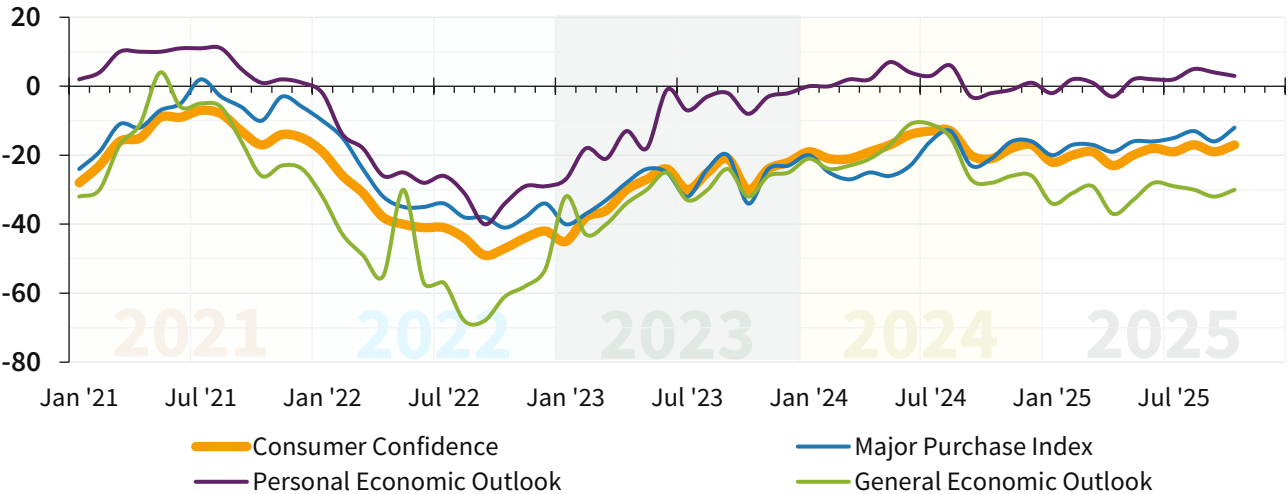
Since September 2025, personal financial outlooks fell by -1pt to 3pts overall, and general economic outlooks rose +2pts to -30pts. Compared to last October, personal outlooks are 5pts higher than they were in 2024, whilst general outlooks are on par.

Meanwhile, the major purchase index rose by +4pts to -12pts overall. This is

the new highest score for the major purchase index since January 2022, indicating that consumers think that now is a better time for purchasing high-value goods (e.g. furniture or white goods). A score of -12pts overall is +9pts higher than it was in October 2024.

The Savings Index also increased in October 2025, up +7pts from September. The overall score of +29pts is only +2pts higher than in October 2024, indicating that consumers feel now is a better time to be saving. This somewhat contradicts the rise in the Major Purchase Index.

Although October's score marks a notable monthly increase, the Savings Index was as high as +34pts in July 2025.



Measure	Score (Oct 2025)	Change v Sep 2025	Change v Oct 2024
Overall Consumer Confidence Index	-17	▲ 2	▲ 4
Personal financial outlook (next 12 months)	3	▼ 1	▲ 5
General economic outlook (next 12 months)	-30	▲ 2	(=) 0
Major Purchase Index	-12	▲ 4	▲ 9
Savings Index	29	▲ 7	▲ 2

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. Scores are given as a comparative to when records began in 1974.

# Consumer Spending

October 2025

**In October 2025, consumers spend on “essentials” remained in decline - down -2.5% compared to the previous year, while “non-essential” spend increased marginally by +0.1%.**

Essential spend includes groceries, childcare, healthcare, insurance, fuel, and public transport. Non-essential spend includes all other purchases. Both essential and non-essential spend effectively fell with respect to CPIH inflation (see page 19).

Consumer spending at garden centres rose by 7.6%, vastly outpacing consumer’s increased spending on household retail (+0.6%). This figure is in line with the +7% increase in sales value we reported on page 5. Given the contraction in consumers’ essential and non-essential spending, such a large increase in garden centre sales is very positive, and indicates that consumers are increasingly turning to garden centres for shopping visits or days out.

Meanwhile, garden centre café/restaurant sales growth also outpaced the hospitality sector, which saw sales increases of +0.8% since October 2024. As reported on page 10, garden centre café sales rose by +10% in the same period.

Although garden centre café sales are inherently supported by visits to garden centres, this growth suggests that cafes are becoming a more significant driver of overall footfall and spend, rather than just a secondary offering.



# Inflation and Wages

**CPIH Inflation remained steady from the previous month at 4.1% in September 2025. Meanwhile, the UK unemployment rate hit 5.0% for the first time since the pandemic, following gradual monthly increases since the middle of 2024.**

While inflation has remained stubbornly high, regular pay growth continues to contract, falling from 4.8% to 4.5% in the past two months. Public sector pay rises are far exceeding the private sector, which saw pay growth increase by 3.8% - below inflation for the first time since 2023.

The Bank of England has said that it believes inflation has “peaked”,

although no cuts to interest rates have yet been made.

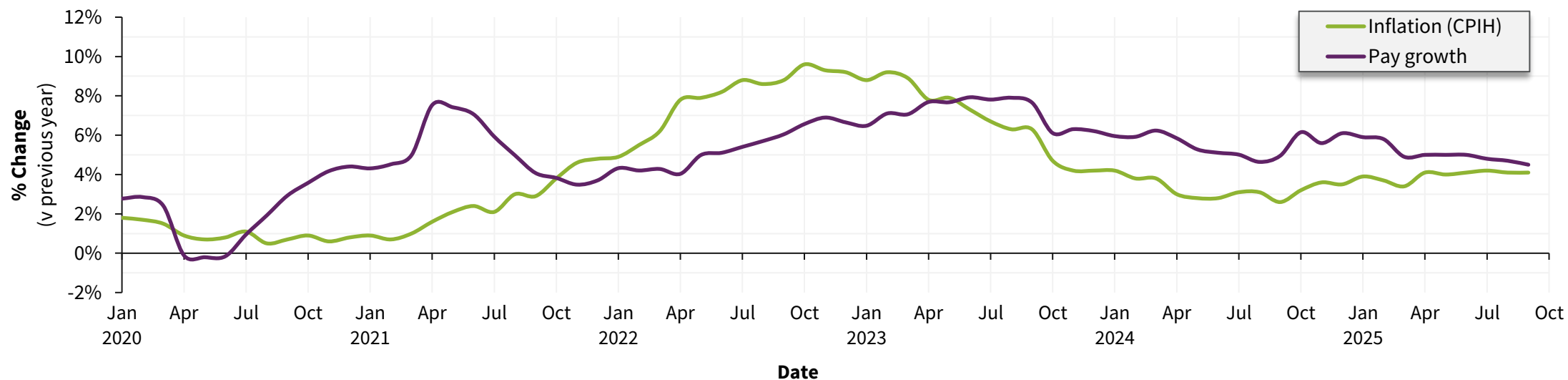
Meanwhile, unemployment has climbed to 5.0% of the working population, while total job vacancies fell for the 40<sup>th</sup> consecutive month (relative to the preceding three months). This suggests that many businesses have reduced or slowed their hiring, possibly due to increases to operating costs from the national insurance or minimum wage rises in 2024’s Autumn Budget.

This aligns with the findings of HTA & APL’s [Business Barometer Report for Q3 2025](#), which highlighted that 79% of members behind their expected profit position intend to pause or slow investment in their business.

**Inflation (CPIH; Sep 2025) = +4.1%**

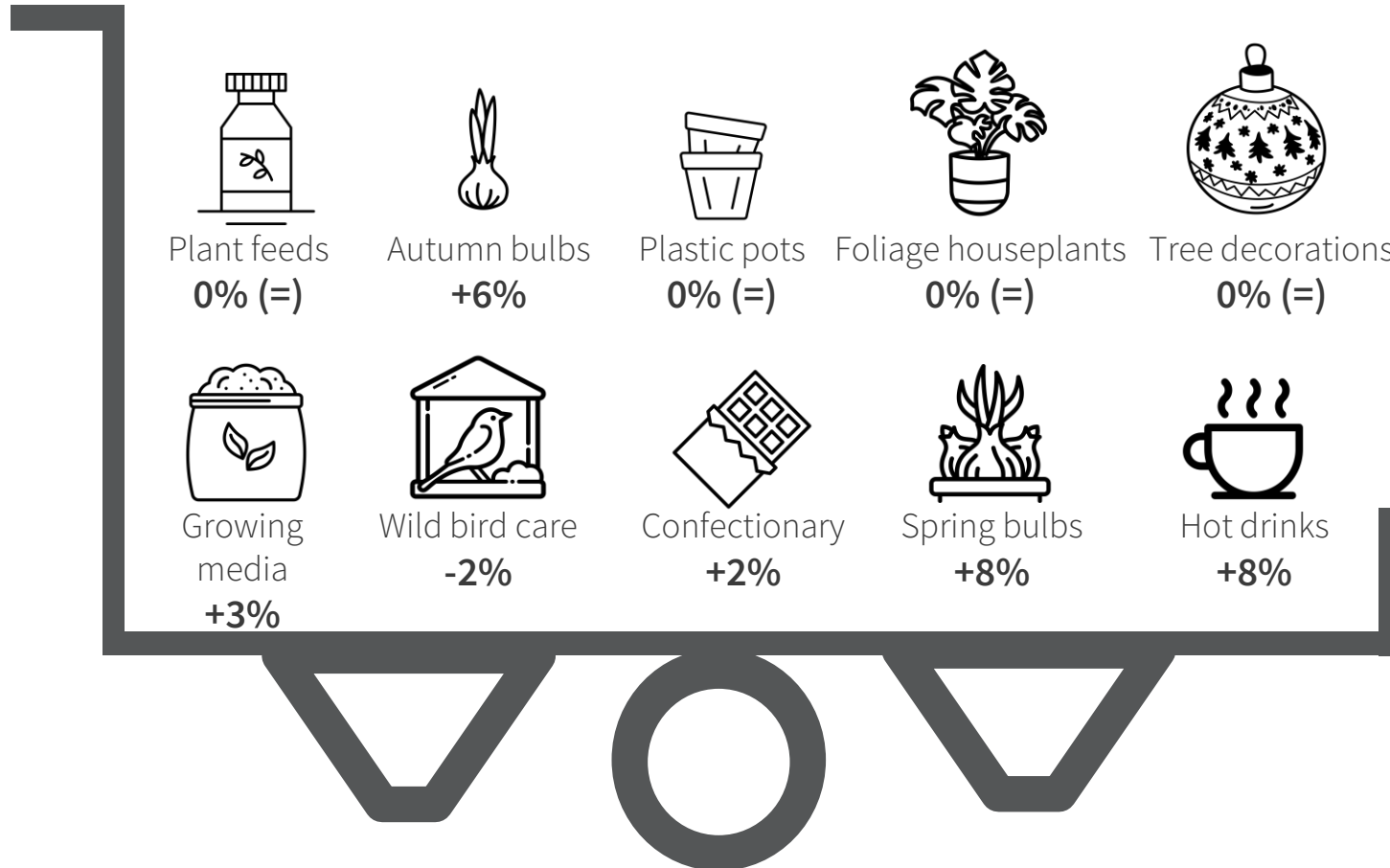
**Regular Pay Growth (Jul-Sep 2025) = +4.7%**

**Unemployment rate (Jul-Sep 2025) = 5.0%**



# Retail Inflation

October 2025 v October 2024



Our analysis compares the prices of individual items purchased in garden centres between October 2025 and October 2024. We calculated a **median inflation rate** across each category featured in our seasonal trolley. The 'trolley' of goods selected is based on the volume of different products purchased in garden centres in October

Price inflation of hot drinks continued at +8% in October 2025, and consistent with previous months. Bulbs also exhibited noteworthy price increases, with autumn bulb prices up +6% from October 2024 and spring bulb prices up +8%.

Other top-selling products showed more moderate price increases. Growing media prices were up +3% on average, while confectionary sales in food and farm shop areas were up +2% year-on-year.

Most other categories had a median inflation rate of 0%, although this may mask price increases within specific product ranges or brands.



# Retail Inflation on Outdoor Plants

October 2025 v October 2024

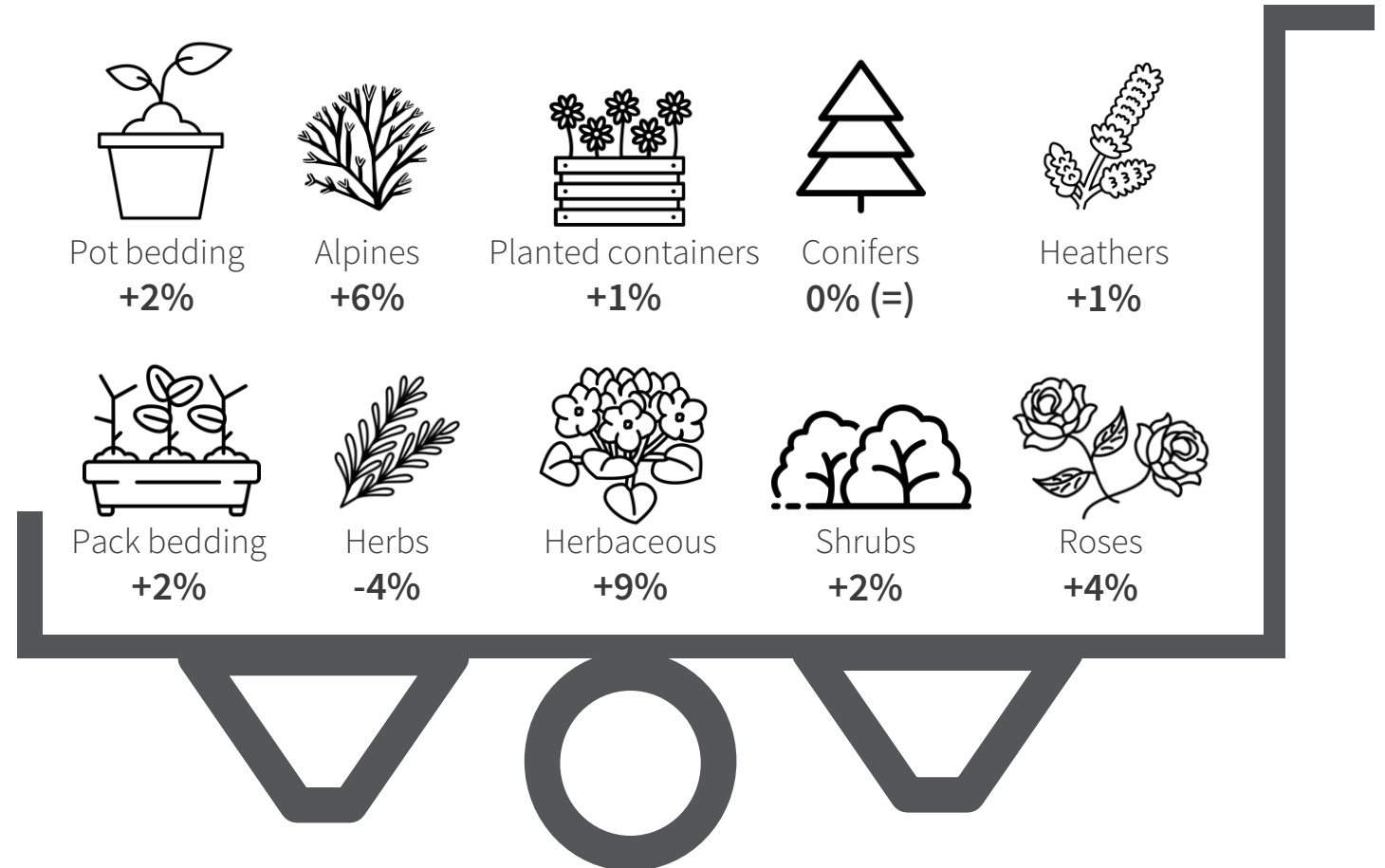
We also look at retail price inflation across various plant categories within garden centres, comparing October 2025 to October 2024.

Herbaceous plants continue to exhibit significant price increases on last year, with median price inflation of +9%.

Roses and alpiners were also subject to notable price increases, with median price inflations of +4% and +6% respectively.

Most other outdoor plants appeared to have minimal or no price increase. With the core gardening season having come to a close, most plants are likely being sold at a discounted rate, hence why prices could be flat or up no more than +2%.

Discounting was particularly stark for herbs, which saw an average price decrease of -4% compared to October 2024.



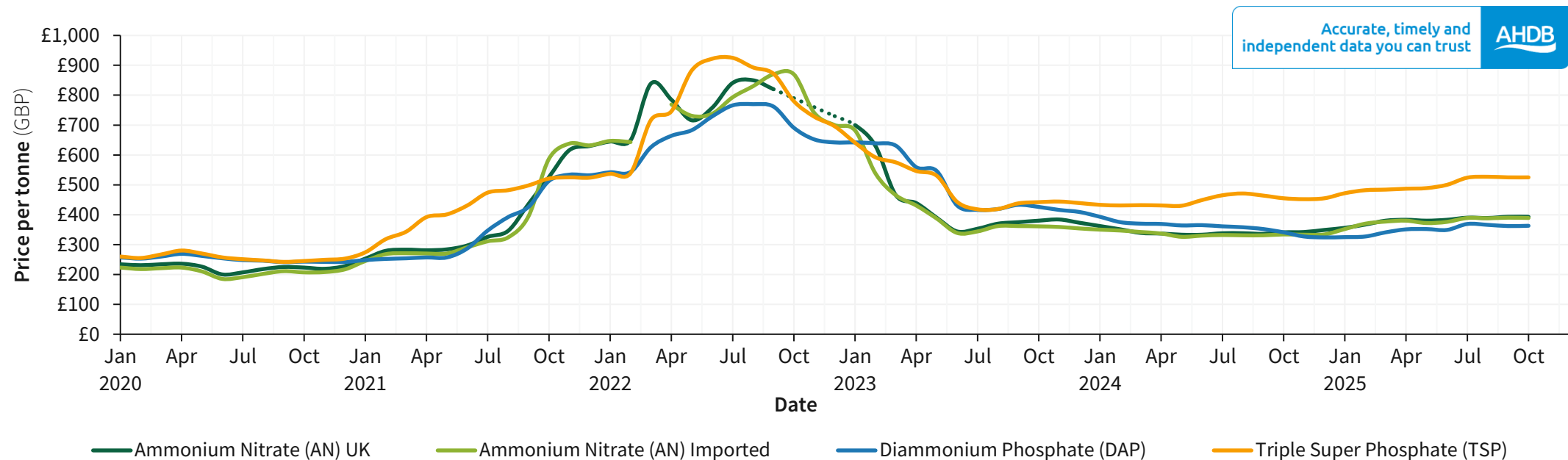
# UK Fertiliser Prices

**Prices of fertiliser components remained stable between September and October 2025, with no increase to prices on any tracked component. However, most components typically remain around +15% more costly than in October 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 in the last 12 months. The smallest increase is seen in Muriate of Potash prices (up +5% year-on-year). Other components exhibited greater price increases, with ammonium nitrate prices up +16% and triple super phosphate prices up +15%.

Given the general upward trajectory of tracker components over the past 12 months, fertiliser prices may increase so that producers are able to maintain their profit margins.



# Shipping Container Prices

**As of November 13<sup>th</sup> , Drewry's World Container Index (WCI) of shipping container prices has started to fall again, following a General Rate Increase (GRI) imposed by carriers.**

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 \$1,859 per 40ft container as of November 13<sup>th</sup> , 2025, down -46% compared to November 2024.

Prices fell for 17 weeks in a row, before rising for four weeks across October. Carriers implemented a General Rate Increase (GRI) to stop prices from falling.

A week after the end of the GRI, rates have fallen sharply, particularly for transpacific trade (down -15% in one week). Rates are expected to continue declining over the coming quarters.

The reason for declining container prices is twofold: firstly, container ships that had been commissioned in recent years have been added to fleets over the past few months, resulting in greater supply capacity. Secondly, transpacific trade continues to be throttled by Trump's tariffs, meaning that fewer goods are crossing the Pacific and most ships are rarely travelling at full capacity.

The combination of increased supply and reduced demand has therefore caused prices to fall rapidly.

## Drewry World Container Index (WCI)

13<sup>th</sup> November 2025 (USD/40ft container)



# Closing Comments

## Get in touch

We hope you enjoyed the format and content of November 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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