



Market Update

December 2025 Edition

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Overview

- November 2025 was another month of positive sales growth for UK garden centres, with **overall sales increasing by +8% by value** compared to November 2024.
- There were **five weekends in November 2025**, whereas November 2024 and 2023 had four weekends. This may somewhat inflate November 2025's sales figures, given that a higher volume of sales occur on weekends than weekdays. Consequently, this may negatively impact comparisons for December's sales, with only three weekends of trade before Christmas
- **Gardening sales increased by +3% by value from November 2024**, although volumes remained flat on November 2024. However, compared to November 2023, sales were up by +12% by value and volumes up +8%, indicating continued strong demand for autumn gardening.
- **Christmas sales got off to a strong start, up +9% from November 2024** and +40% up from November 2023. Other non-gardening categories (gifting, food & farm shop, catering) performed similarly as well, resulting in **overall non-gardening sales value having increased by +9%** compared to November 2024.
- **Catering sales were up +11% from November 2024**, supported by both higher average transaction values and greater footfall in garden centre cafes compared to previous Novembers.
- **November 2025 was exceptionally wet**, in stark contrast to previous dry months. The UK received 33% more rainfall than is typical for November, resulting in reservoir levels recovering significantly.
- Consumer confidence remained cautious in November 2025, with the **overall index falling -2pts to -19pts overall**. All measures which contribute to the overall index fell by at least -2pts, ahead of the 2025 Autumn Budget being delivered.
- Following another month of sales growth, garden centre **sales for the year-to-end of November 2025 remain +8% ahead of 2024** and +12% ahead of 2023. However, despite these exceptional sales figures, garden centres are experiencing only minimal profit growth due to significantly higher operating costs. HTA will be collecting evidence on how the increased business costs from last year's Autumn Budget has affected members' investment plans and profit margins at the start of 2026.
- **Read on for all the detail...**

Key Points

November 2025

Overall garden centre sales rose by **+8%** from November 2024

Catering sales increased by **+11%** from November 2024

Consumer confidence fell by **2 pts**, remaining constant and low for a seventh consecutive month

Garden/Gardening sales volumes were flat compared to November 2024

Christmas sales started strongly, up **+9%** from November 2024



Garden Centre Sales

November 2025

Overall garden centre sales by value increased by +8% between November 2024 and 2025, while volumes increased by +4%.

Non-gardening sales were the main contributor behind growth (up +9% for 2025 v 2024; up +23% for 2025 v 2023, accounting for 80% of the month's total turnover).

Gardening sales volumes were flat in November 2025 compared to 2024, while sales values increased by +3% - likely affected by wet weather conditions across the UK. However, this was still up +12% by value from 2023, and +8% by volume, indicating healthy demand for autumn gardening.

November 2025's sales will have benefitted moderately from having five full weekends within the month, whereas 2024 and 2023 both had four weekends.

Consequently, there are only three weekends in December 2025 before Christmas, which may negatively affect Decembers' total sales. Nonetheless, December has started strongly, with sales up +14% by value in the first week of December 2025.

	November 2025 vs 2024		November 2025 vs 2023	
	Sales Value (£, Exc. VAT)	Sales Volume (n)	Sales Value (£, Exc. VAT)	Sales Volume (n)
Overall Incl. catering	▲ 8%	▲ 4%	▲ 20%	▲ 12%
Overall Excl. catering	▲ 8%	▲ 4%	▲ 20%	▲ 11%
Garden/ gardening	▲ 3%	(=) 0%	▲ 12%	▲ 8%
Non-garden/ gardening Incl. catering	▲ 9%	▲ 6%	▲ 23%	▲ 13%
Non-garden/ gardening Excl. catering	▲ 9%	▲ 5%	▲ 22%	▲ 12%

Average Transaction Values (ATVs) and Transaction Numbers

Garden Centre (excluding café/restaurant); November 2025

Garden centres recorded +4% more transactions in November 2025 than in 2024. Average transaction values rose +4% from 2024 and +12% from 2023.

The higher volume of transactions indicates strong footfall throughout November 2025, although the extra weekend in November may have inflated the results compared to previous years.

Consumers spent more at garden centres in November 2025 (£24.48 excl. VAT) than in 2024 (£23.56) and 2023 (£21.95). This was despite persistently low consumer confidence (see page 16) ahead of the Autumn Budget being delivered.

Christmas tree sales, as a high-value item, helped to lift ATVs, with sales volumes up by around +25% compared to November 2024.

Total Transactions (Garden Centre):



Average Transaction Values (ATVs) (Garden Centre):

£ **Excl. VAT
24.48**
£ **Incl. VAT
28.71**

November 2025 vs 2024 (Excl. VAT)	November 2025 vs 2023 (Excl. VAT)
▲ 4% (£23.56)	▲ 12% (£21.95)

Average Transaction Values (ATVs) and Transaction Numbers

Café/Restaurant; November 2025

Total transactions also increased in garden centre cafes in November 2025, up +7% from 2024. ATVs also increased by +4% from November 2024, and +9% from November 2023.

An increase in transactions suggests strong footfall in garden centre cafes, outpacing the growth in footfall in the wider garden centre. This may indicate that some consumers visited garden centres

particularly for the café. Page 17 highlights how garden centre cafes are vastly outperforming other cafes and restaurants.

Prices of catering goods continue to exhibit moderate inflation, albeit down from recent months. This suggests that catering price increases have generally slowed pace for the moment.

Total Transactions (Café/Restaurant):



Average Transaction Values (ATVs) (Café/Restaurant):

£ **Excl. VAT
12.13**
£ **Incl. VAT
14.53**

November 2025 vs 2024 (Excl. VAT)	November 2025 vs 2023 (Excl. VAT)
▲ 4% (£11.70)	▲ 9% (£11.16)

Gardening Products

Sales by value; November 2025

Overall gardening sales increased by +3% from November 2024 to November 2025.

Sales of indoor plants were down by -1% in November 2025 compared to November 2024. As indoor plants are one of the largest “gardening” categories in November, this has significant sway on the overall gardening sales position.

Comparatively, bedding plant sales performed well, up +10% from November 2024 and +18% up from November 2023.

Meanwhile, hardy plant sales were flat on November 2024 but grew +6% from November 2023.

Seed and bulb sales were particularly strong in November 2025, up +27% and +24% on November 2024, respectively. However, these items tend to have lower individual value. Combined, the two categories only make up 5% of overall gardening sales in November, meaning that the large percentage increases reflect growth from a small base.

Category	November 2025 vs 2024	Nov YTD 2025 v 2024	November 2025 vs 2023
Bedding & other plants	▲ 10%	▲ 10%	▲ 18%
Hardy plants, shrubs & trees	(=) 0%	▲ 5%	▲ 6%
Indoor plants	▼ 1%	▼ 1%	▲ 3%
Seeds (excl. grass seed)	▲ 27%	▲ 6%	▲ 9%
Bulbs	▲ 24%	▲ 13%	▲ 38%
Plant care products	(=) 0%	▲ 9%	▲ 16%
Garden tools & equipment	▼ 3%	▲ 10%	▼ 5%
Outdoor containers	▲ 1%	▲ 5%	▲ 13%
Garden sundries	▲ 9%	▲ 4%	▲ 12%
Garden features & structures	▼ 2%	▲ 13%	▲ 9%

Non-Gardening Products

Sales by value; November 2025

Overall non-gardening sales rose by +9% in November 2025 compared to November 2024, and +23% compared to November 2023.

Christmas got off to a strong start in November 2025, with sales up +9% from 2024 and +40% from 2024. Gifting sales also saw solid growth, up +12% from 2024.

Catering sales also performed well, up +11% from November 2024 and +23% from November 2023.

These results reflect garden centres' growing role as festive destinations — places where shoppers can browse gifts, purchase seasonal decorations and their Christmas tree, and enjoy a treat in the café, all under one roof.

Food & farm shop sales also grew considerably in November 2025, up +12% from 2024 and +18% from 2023.

Conversely, wild bird care sales continue to lag behind other departments, down on both November 2024 and 2023. Given consumer confidence has remained subdued throughout 2025, shoppers have likely prioritised spending on themselves and their households first and foremost.

Category	November 2025 vs 2024	Nov YTD 2025 v 2024	November 2025 vs 2023
Catering	▲ 11%	▲ 10%	▲ 23%
Christmas	▲ 9%	▲ 10%	▲ 40%
Food & farm shop	▲ 12%	▲ 12%	▲ 18%
Indoor living & homewares	▲ 4%	▲ 5%	▲ 2%
Wild bird care	▼ 5%	▼ 3%	▼ 6%
Pets	▲ 6%	▲ 2%	▲ 8%
Gifting	▲ 12%	▲ 7%	▲ 15%

Category Shares by Value

November 2023-2025

In November 2025, Christmas led the way as the largest category by turnover, accounting for 26% of monthly garden centre sales.

The prevalence of Christmas sales has clearly grown in recent years, up from 22% in November 2025. This highlights how garden centres have increasingly diversified their product makeup, particularly outside of the core gardening season, to maintain a continuous cashflow across the year.

After Christmas, catering sales accounted for 16% of November's sales, largely in line with previous years despite good growth within the category.

Live plants, bulbs and seeds was only the fifth-largest category in November 2025, at 9% of monthly sales. Overall, gardening sales made up around 20% of the month's total turnover, further emphasising the diverse product makeup of garden centres outside of the core gardening season.

Meanwhile, gifting, homewares, and other non-garden products collectively hold 27% of the November's total turnover, with consumers increasingly visiting garden centres as a location to buy gifts for family and friends.

Category	November 2025	November 2024	November 2023
Christmas	26%	25%	22%
Catering	16%	17%	17%
Other non-garden products	12%	12%	13%
Food hall & farm shop	11%	10%	10%
Live plants, bulbs, & seeds	9%	9%	10%
Homewares & floristry	9%	9%	10%
Gifting	6%	5%	6%
Wild bird care, pets, & aquatics	3%	4%	4%
Garden care & maintenance	3%	3%	3%
Garden containers & structures	3%	3%	3%
Other garden products	1%	1%	1%
Outdoor living	1%	1%	1%

Year-to-Date Sales

Calendar year to November 2025

At the end of November 2025, overall year-to-date sales were +8% ahead of 2024 and +12% ahead of 2023 by value.

When excluding catering, year-to-date sales remain +8% ahead of 2024, underlining the strength of performance of non-catering categories in 2025.

Split by gardening/non-gardening, sales growth is largely balanced across the garden centre, with +8% and +9% increases for the year to

date respectively.

Compared to year-to-end of November 2023, non-gardening sales growth is exceptionally high (+22%), whereas gardening sales growth is more reserved at +4%.

HTA estimates that a garden centre needs sales increases of 10-15% in order to maintain last year's profit margin, due to recent increases in operating costs (minimum wage, NICs, etc.).

	Overall Incl. catering	Overall Excl. catering	Garden/ Gardening	Non-garden/ gardening Incl. catering	Non-garden/ gardening Excl. catering
YTD Nov 2025 vs YTD Nov 2024	▲ 8%	▲ 8%	▲ 8%	▲ 9%	▲ 8%
YTD Nov 2025 vs YTD Nov 2023	▲ 12%	▲ 8%	▲ 4%	▲ 22%	▲ 16%

(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. 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/

National Weather

November 2025 v November 2024

November 2025 was notably wet throughout the month, receiving 33% more rainfall than the long-term average.

The rain was generally prolonged across the month, resulting in 19.0 rain days in November 2025. This had a positive impact on groundwater levels and river flows, and did not appear to put consumers off visiting garden centres to make their Christmas purchases.

Despite the rain, November 2025 was both warmer and sunnier than November 2024. An average temperature of 7.2°C put the month +0.7°C ahead of the long-term average for November, while total sunshine was up by +20% compared to November 2024.

The UK's water situation remains in the balance, although forecasts have improved for the near future. 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.

	November 2025	November 2024	Long-term average (1991-2020)
 Mean temperature (°C)	7.2	6.6	6.5
 Hours of sunshine	60.6	50.9	57.9
 Total Rainfall (mm)	162.1	93.8	121.9
 No. of rain days (>1mm/day)	19.0	10.4	15.7

Regional Weather

November 2025

Regionally, all areas of the UK received substantially more rainfall than their long-term averages for November.

Wales was the wettest area of the UK by a considerable margin, although Northern Ireland saw slightly more rain days (22.5) across November 2025.

Comparatively, the South of England was warmer, sunnier, and saw less rainfall than the rest of the UK. As detailed on slide 15, the lower volume of rainfall in the South resulted in a smaller recovery in reservoir levels, compared to the rest of England and Wales.

Region	Mean Temp (°C)	Hours of sunshine	Rainfall (mm)	Rain days (> 1mm)
Overall	7.2	60.6	162.1	19.0
Scotland	5.4	44.5	179.3	20.7
Northern Ireland	7.2	57.3	149.2	22.5
North England	7.3	61.1	173.2	20.0
South England	8.7	75.5	118.6	15.8
Wales	7.9	61.9	258.7	21.6



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

Water Availability

River and Groundwater Levels

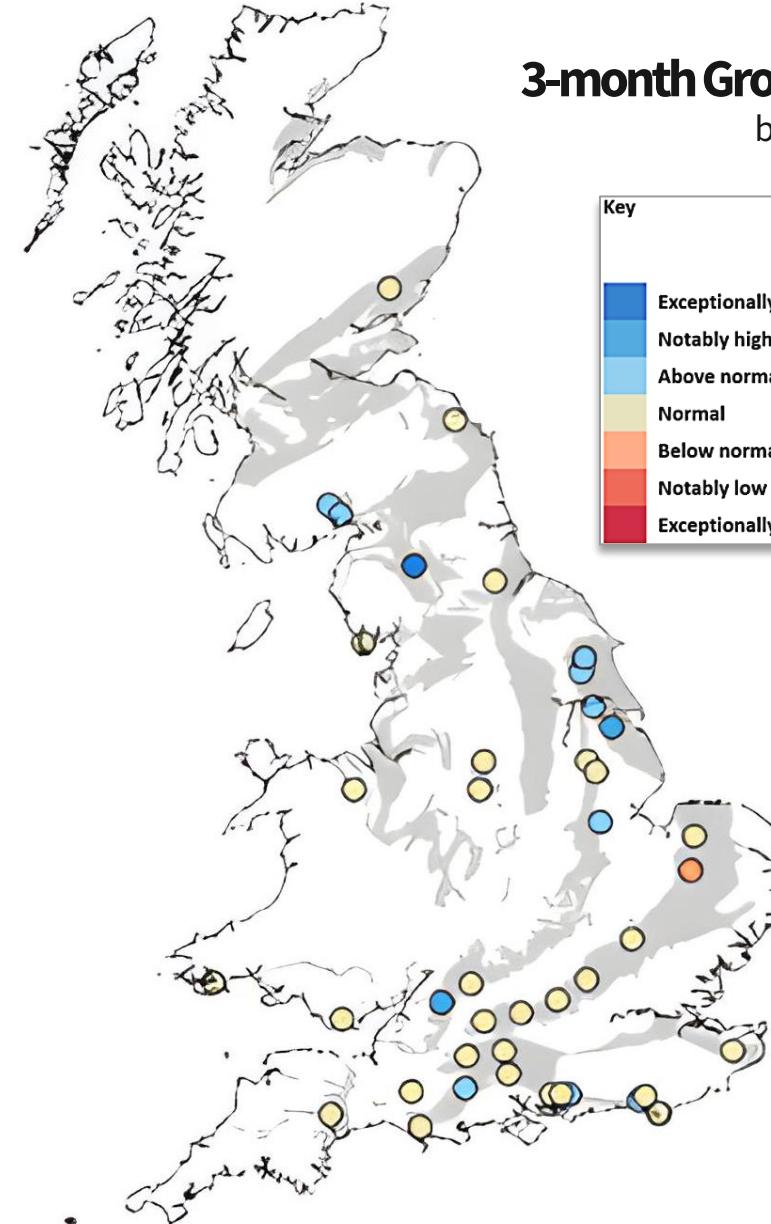
Following consistent rainfall across the UK in November 2025, groundwater levels have recovered considerably.

Forecasts from the MET Office are leaning towards a wet December, although the chances of a dry season remain normal.

Assuming the median forecast, the UKCEH forecasts that groundwater will return to normal levels in all bar one site across the UK, with above normal and high groundwater levels anticipated in some regions.

River flows also recovered following high rainfall, although some sites in the Southeast remain below normal for this time of year.

In the coming months, river flows and groundwater are forecast to be above normal in the North and Scotland, while areas in the South and Southeast remain likely to stay below normal throughout the winter.



3-month Groundwater Outlook

based on median rainfall forecast
(5th December 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

Following exceptionally high rainfall, reservoir levels recovered significantly in the North of England and Wales, with more moderate recoveries in the South of England.

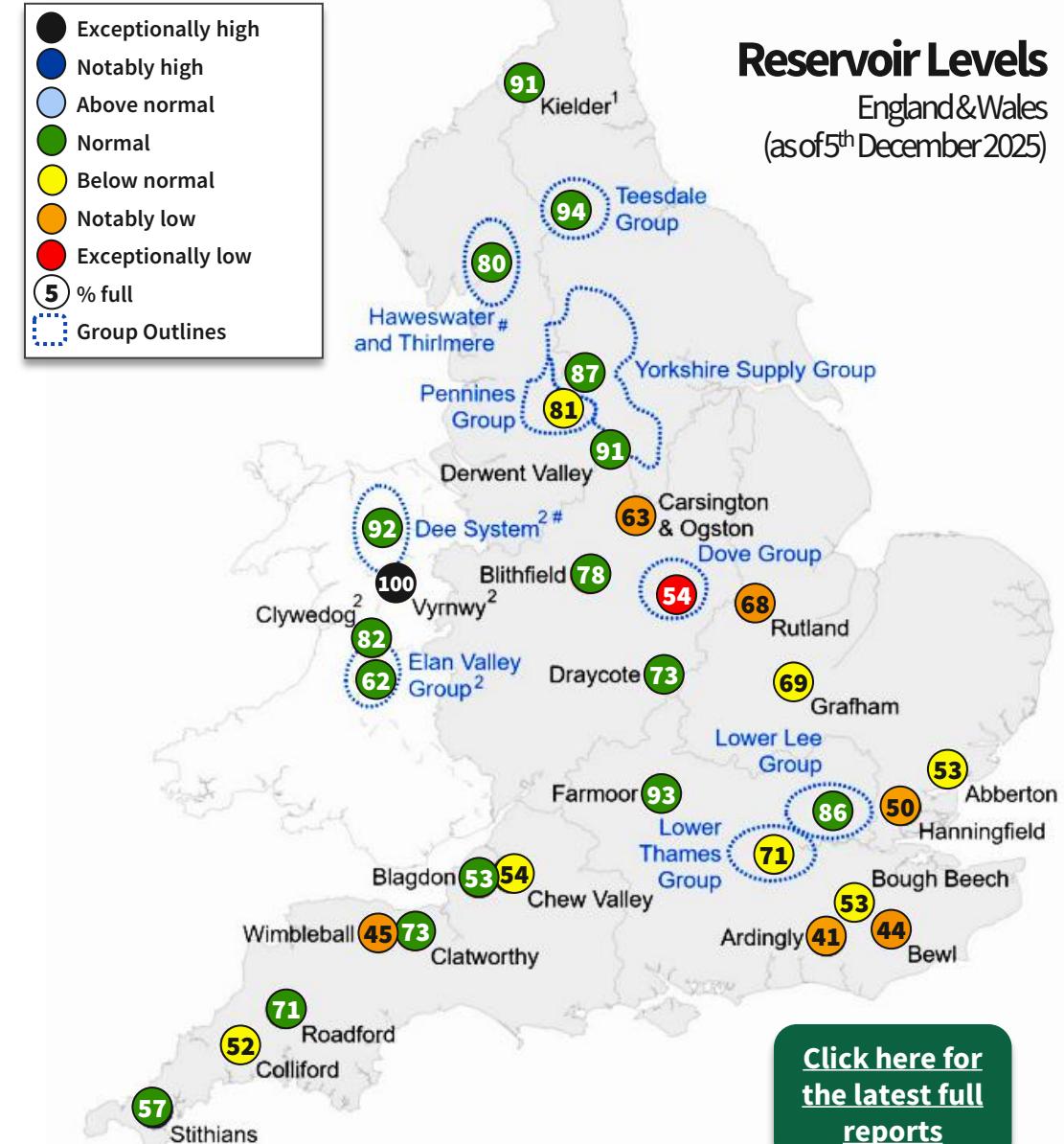
With reservoir levels having improved substantially, Temporary Use Bans (TUBs) have been lifted by Yorkshire Water (10th December) and Thames Water (27th November).

South East Water remains as the only water company with a TUB in place, affecting the Sussex and Kent regions. Reservoirs in the South East saw more moderate recovery, with an average increase in volume below 10%. Therefore, most reservoirs in the South East remain below normal levels.

The HTA continues to attend meetings of the National Drought group. Although the water situation has improved in the short-term, HTA also continues to advocate for a [long-term Water Resilience Strategy](#).

[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](#).



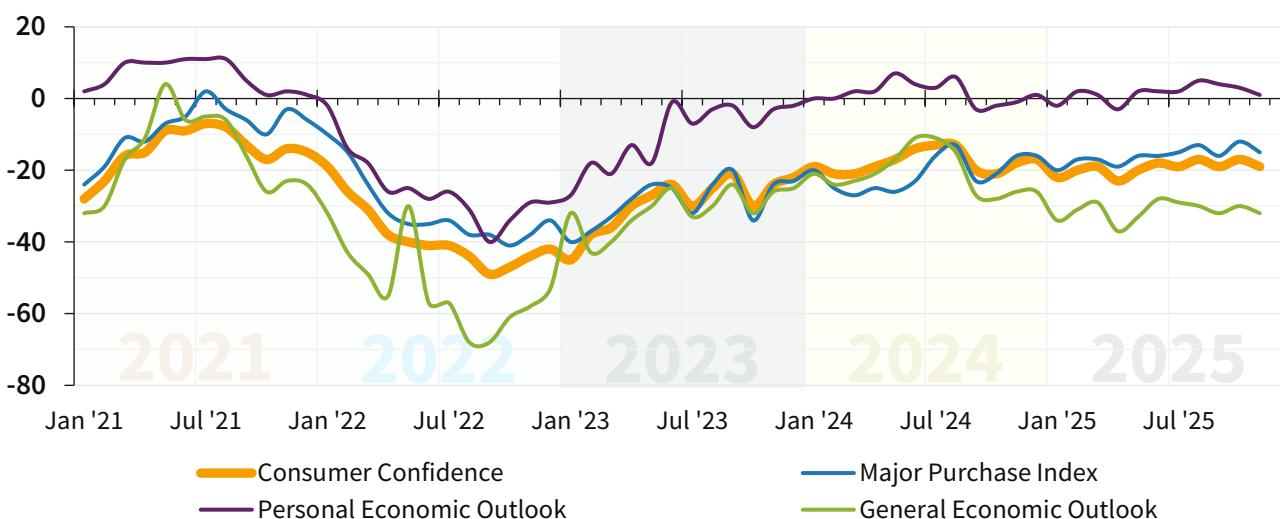
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Consumer Confidence

November 2025 saw consumer confidence fall by -2pts from October 2025, continuing the trend of scores remaining low and stable at -19pts overall. All tracked measures fell by at least -2pts, framed by intense speculation around the Autumn Budget.

All consumer confidence scores were taken from before the Autumn Budget was delivered (cutoff = November 14th 2025). Therefore, they do not factor in the changes delivered in the Budget.

Personal financial outlooks fell -2pts from October 2025, with consumers anticipating tax rises in the budget. However, this was a +2pt increase compared to November 2024.



General outlooks meanwhile fell -2pts from October 2025, down -6pts from this time last year. This suggests that consumer's perception of the economy is moderately worse than at this time last year.

Both the Savings Index and Major Purchase Index fell in November 2025 from the previous month but were approximately equal in score to November 2024.

This further suggests that consumers perceive that economic conditions are hampering their ability to both spend and save, despite describing their personal circumstances as having improved.

Measure	Score (Nov 2025)	Change v Sep 2025	Change v Nov 2024
Overall Consumer Confidence Index	-19	▼ 2	▼ 1
Personal financial outlook (next 12 months)	1	▼ 2	▲ 2
General economic outlook (next 12 months)	-32	▼ 2	▼ 6
Major Purchase Index	-15	▼ 3	▲ 1
Savings Index	24	▼ 5	(=) 0

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

November 2025

According to Barclays, consumers spend on “essentials” continued to decline in November 2025 - down -2.9% compared to the previous year. Non-essential spend also fell, by -0.3%.

This data is based on actual card payment transactions, reflecting actual consumer behaviour. Essential spend includes groceries, childcare, healthcare, insurance, fuel, and public transport. Non-essential spend includes all other purchases.

Consumer card spending at garden centres rose by 1.5%, performing better than most other retail sectors as reported by Barclays. This figure is below the +8% increase in sales by value that we reported on page 5, although Barclay's figure does not account for any cash transactions.

Meanwhile, garden centre café/restaurant sales growth outpaced the hospitality sector by a considerable margin. Hospitality sales were up +0.8% from November 2024, while slide 9 shows that garden centre cafes increased their sales by +11%.

While garden centre café sales will have been supported by visits to garden centres, the faster growth suggests that garden centre cafes are a significant driver of overall footfall and spend, rather than just a secondary offering.



[Click here to read the full Barclays report](#)

Inflation and Wages

CPIH Inflation fell to its lowest level since March 2025, down from 4.1% to 3.8%. The UK unemployment rate continued on an upward trend, increasing by +0.1% to 5.1%.

With inflation falling, the gap between wage growth and inflation increased for the first time in recent months. This gap will likely widen in April when the Budget measures on minimum wage come into effect.

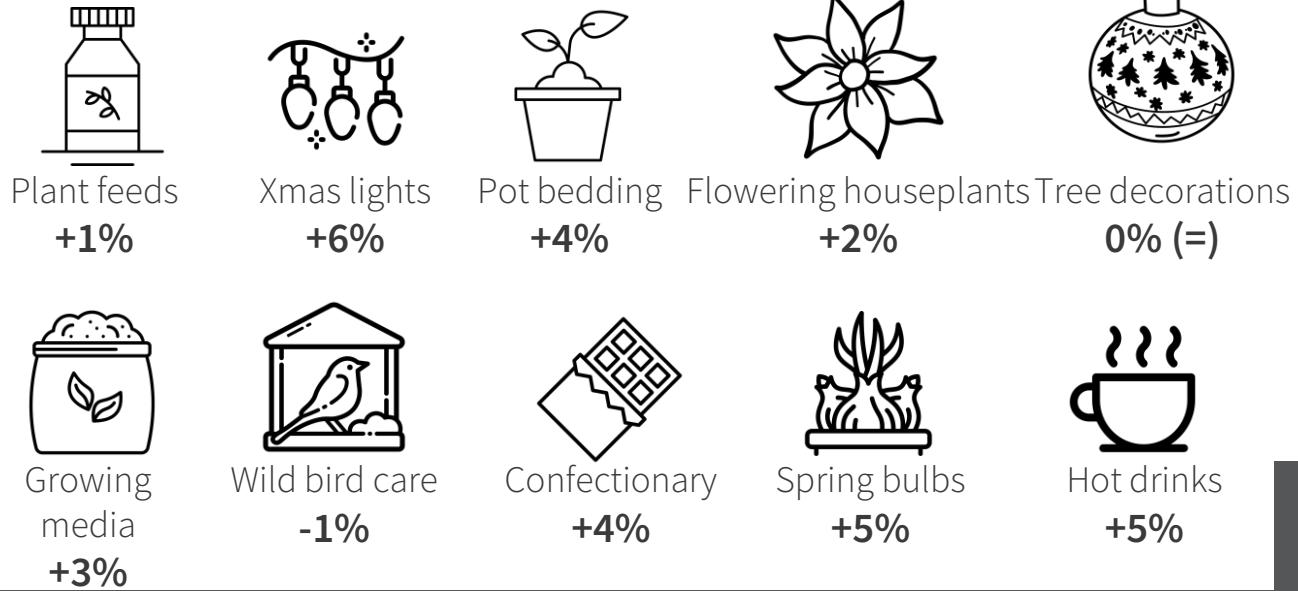
Last month, the Bank of England said that it believed inflation has peaked, and a cut to interest rates is widely anticipated on December 18th 2025.

Meanwhile, the UK unemployment rate increased from 5.0 % last month to 5.1% - the highest level of unemployment since the end of the pandemic.



Retail Inflation

November 2025 v November 2024



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

Price inflation of hot drinks fell from +8% in October 2025 to +5% in November 2025, while confectionary prices were up +4% year-on-year.

Spring bulbs continue to exhibit moderate inflation, up +5% on November 2024. Growing media prices are also up by +3% in the last year, likely reflecting some of the price increases of fertiliser components observed in recent months (see page 20).

Prices of Christmas tree lights increased by +6% from November 2024, while prices of tree decorations were largely flat on last year.

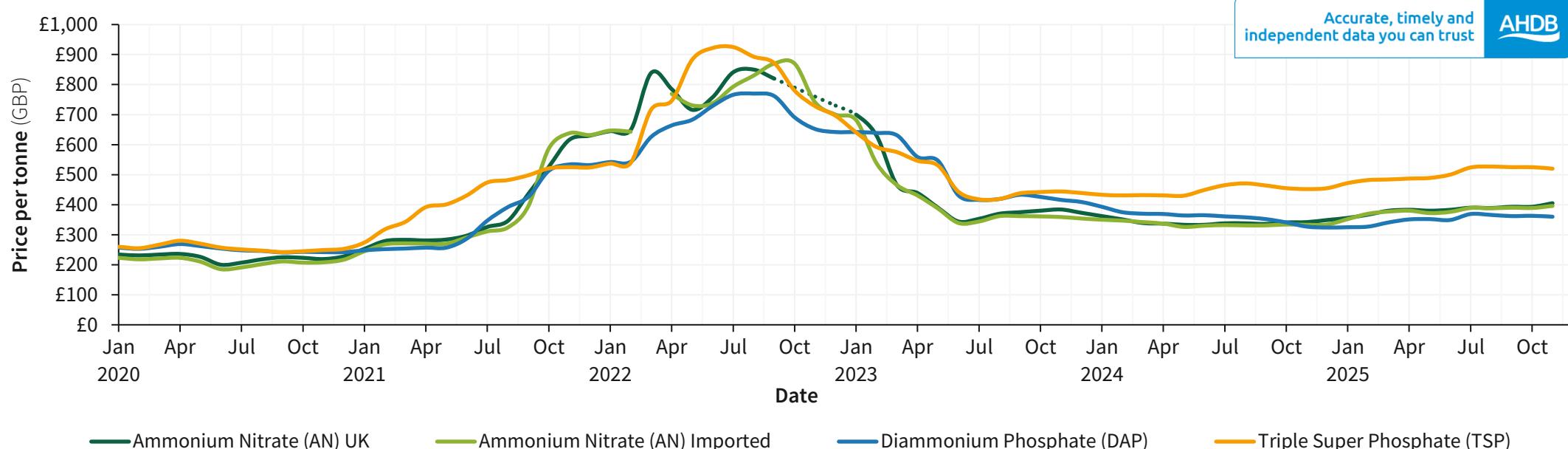
UK Fertiliser Prices

Prices of fertiliser components have remained stable between September and November 2025, with no substantial price increase for any tracked component. However, most components typically remain around +15% more costly than in November 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 +10% year-on-year). Other components exhibited greater price increases, with ammonium nitrate prices up +18% and triple super phosphate prices up +15%.

Given the general upward trajectory of tracker components over the past 12 months, fertiliser prices may rise so that manufacturers can maintain their current profit margins.



Source: © Agriculture and Horticulture Development Board 2025; all rights reserved.

Prices are quoted per tonne for full loads, delivered in bags to site, with standard 28-day payment terms. Spot prices apply to delivery within 28 days.

AN concentration = 34.5% N. Line is dotted where no data exists.

Shipping Container Prices

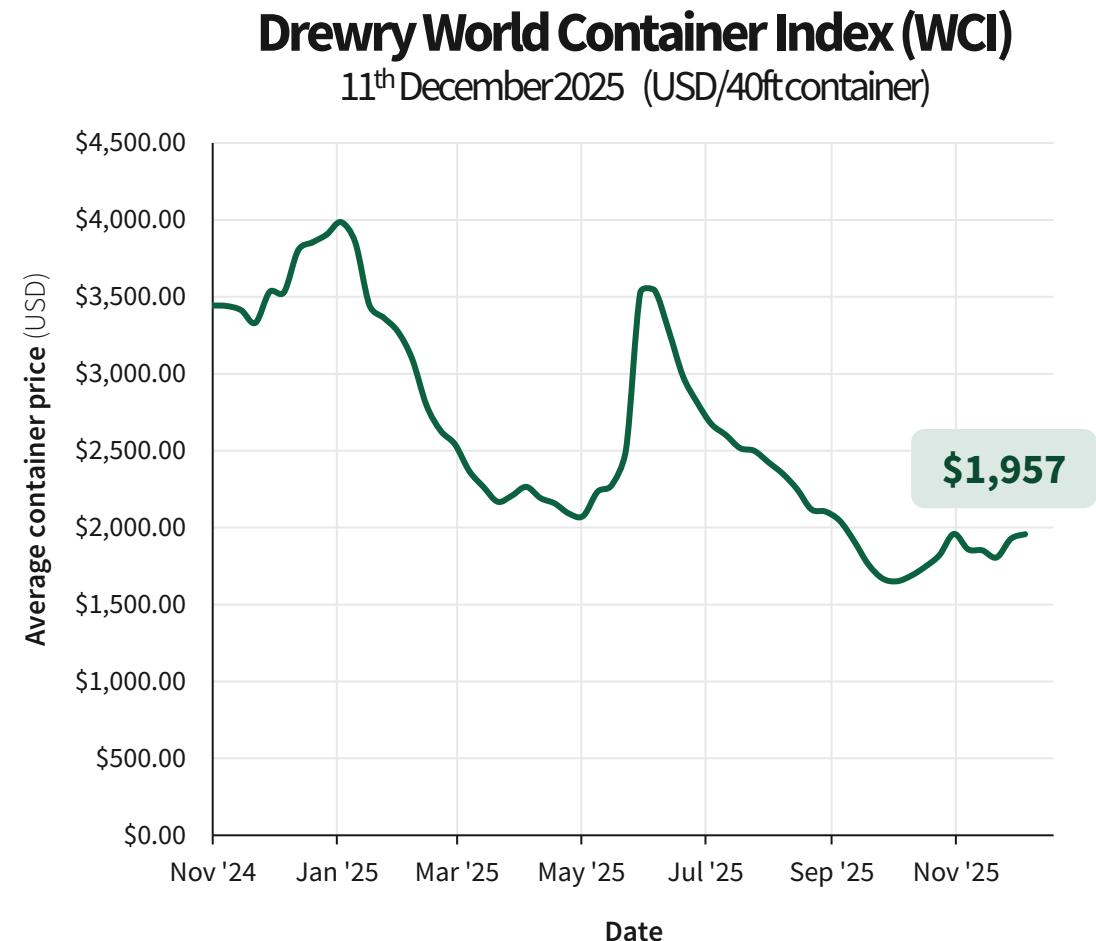
Each month, we report on a composite index which is an aggregate of major shipping costs across various routes. The Drewry World Container Index (WCI) was at \$1,957 per 40ft container as of December 13th 2025, down -45% compared to December 2024.

Following a collapse in rates following Trump's tariffs, prices have largely stabilised, with shipping companies introducing weekly general rate increases to maintain upwards pressure on spot rates.

The reason for the decline in container prices is twofold: firstly, new container ships have been added to fleets over the past few months, resulting in greater supply capacity.

Secondly, transpacific East-West trade continues to realign following the implementation of Trump's tariffs, meaning that fewer goods are crossing the Pacific and that most ships are rarely travelling at full capacity.

The combination of increased supply and reduced demand has therefore caused prices to fall rapidly. Rates are now expected to remain stable, although they may fall again if shipping resumes through the Suez Canal, resulting in greater trade capacity.



Closing Comments

Get in touch

We hope you enjoyed the format and content of December 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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