Market Update

January 2026 Edition

December 2025 and Year-End Review

Contents

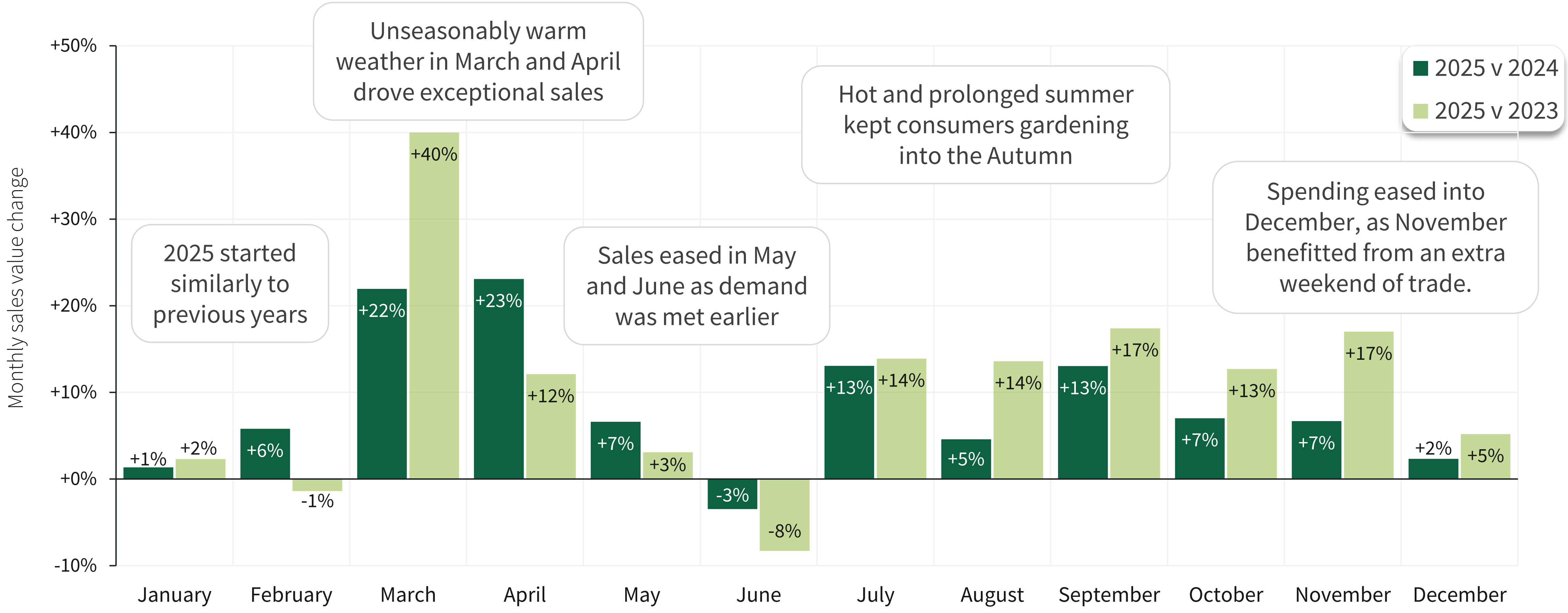
Overview

- **To kick off 2026, January's edition of Market Update looks at the average sales performance of garden centres across the whole of 2025 (pages 5-9), as well as in December 2025 (pages 11-18).**
- On average, garden centres' total sales value in 2025 finished +9% ahead of 2024, and +10% ahead of 2024.
- Warm weather conditions throughout spring 2025, as well as a hot and prolonged summer, gave a significant lift to gardening sales compared to previous years – up +9% compared to 2024.
- In December 2025, overall sales growth was more muted than in previous months, up +2% from 2024 and +5% from 2023.
- However, as there was only three December weekends before Christmas, this limited growth as average spend and transaction numbers tend to be higher on weekends.
- Sales volumes outpaced values, indicating consumers were shopping around for value deals and bargains. This was reflected in average transaction values (exc. VAT) falling relative to 2024 and 2023.
- Gardening sales struggled in December 2025, down -1% from 2024. This was mainly due to the performance of indoor plant sales, which fell by -13% from December 2024 and -15% from December 2023.
- December's weather was generally mild, and considerably warmer than the long-term average. Most of the rainfall occurred in the first half of the month, which may have softened consumer footfall.
- Consumer confidence increased by +2pts in December 2025 from the previous month, returning to -17pts overall, as consumers found themselves less impacted by the Autumn budget than initially anticipated.
- **Read on for all the detail…**

Market Update 2025: Year in Review

2025 Garden Centre Sales by Month

Monthly % change v 2024 and 2023



Source: HTA Garden Retail Monitor

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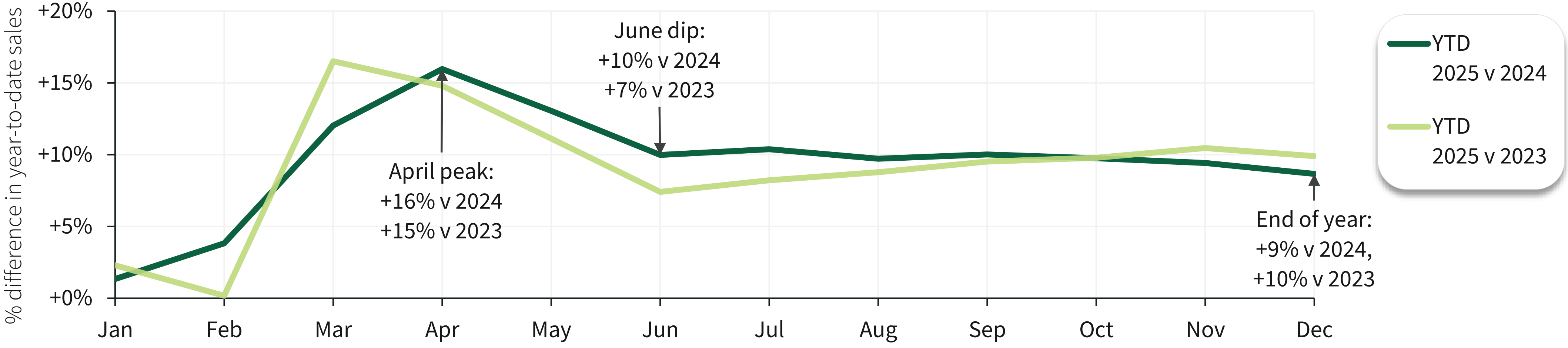
Year-to-date Sales Performance in 2025

Garden centres' year-to-date sales stayed ahead of 2024 and 2023 throughout the whole of 2025.

Following the strong sales in March and April, garden centres built up a lead of +16% compared to 2024 and +15% compared to 2023 at the end of April.

As consumer demand was effectively met earlier than usual, the year-to-date gap shrunk. By June 2025, garden centres' year-to-date lead had been reduced to +10% compared to 2024, and +7% compared to 2023.

Steady sales growth throughout the rest of the year saw the year-to-date position remain largely steady, falling slightly at the end of December to +9% ahead of 2024 and +10% ahead of 2023 for the full year.



Source: HTA Garden Retail Monitor

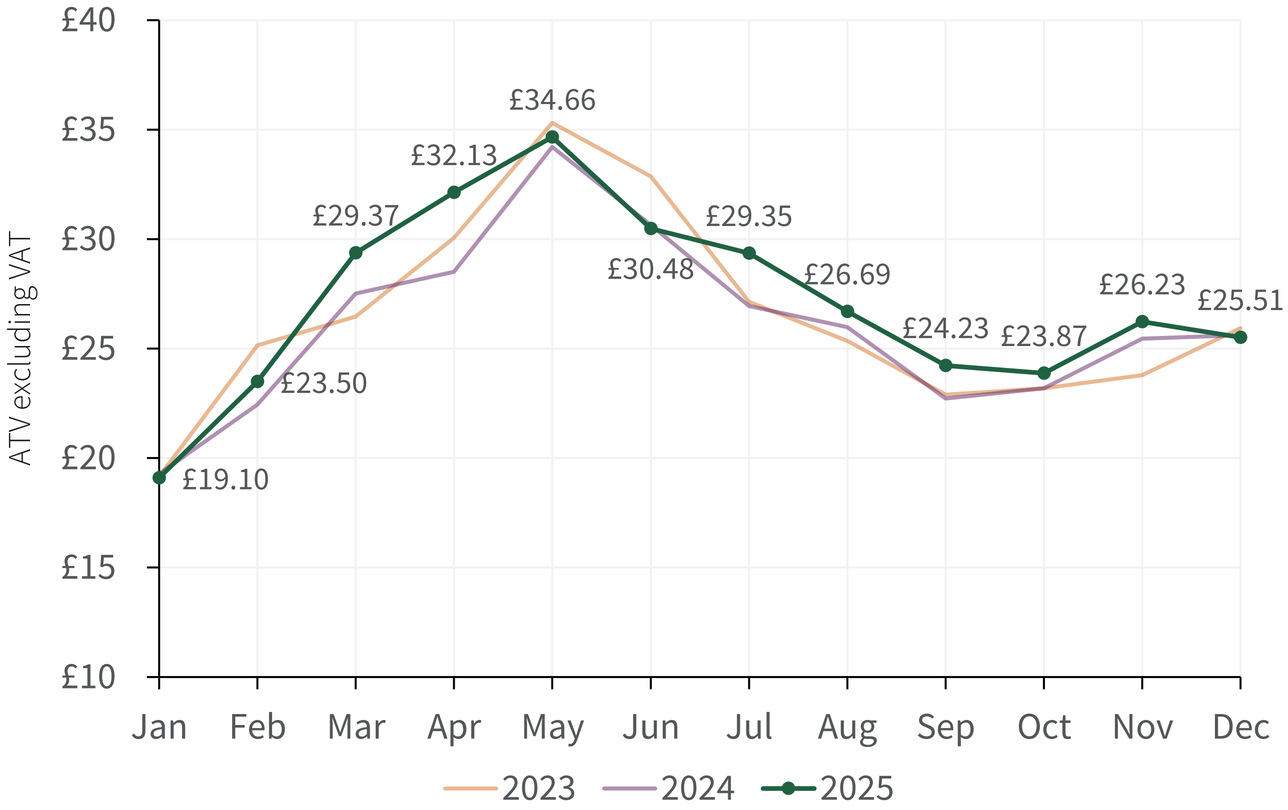
Average Transaction Values by Month

Garden Centres (excluding catering), 2023-2025

Consumer spending in 2025 followed a similar trend to previous years, with average transaction values peaking in May, with a small increase towards Christmas also being observed.

In 2025, average spend surged in March and April, as spending soared in garden centres. Sunny spring weather boosted footfall, while higher spending contributed to exceptional growth during this period.

Generally, ATVs tracked above previous years, likely due to persistently high inflation increasing the value of a similar basket compared to years prior.



UK Weather across 2025

The UK saw extreme and record-breaking weather conditions in 2025. Most notably, it was both the UK's sunniest and hottest year since records began in 1884.

With the UK's mean temperature (including overnight) coming in over 10°C, the UK's top 5 warmest years have now all occurred in the last 11 years, with the top 3 all occurring from 2022 onwards.

Given the exceptional amount of sunshine that the UK received, the spring and summer were incredibly dry, leading to Temporary Use Bans being introduced across England throughout the summer and autumn.

However, a slightly wetter-than-average end to Autumn has replenished reservoirs, reducing concerns that Temporary Use Bans will be reimplemented in spring 2026.

	2025	Long-term average (1991-2020)
Mean temperature (°C)	10.1	9.1
Hours of sunshine	1648.5	1405.2
Total Rainfall (mm)	1041.2	1164.0
No. of rain days (>1mm/day)	137.9	159.0

Source: MET Office

Category Shares in 2025

Across 2025, the share of turnover held by different garden centre categories was broadly consistent with previous years.

Live plants retained a similar share of turnover as in 2024 and 2023 (24%), although its share appears to be declining gradually as garden centres continue to diversify their offerings.

Despite strong demand for plants in the spring, demand waned into the summer as demand had been met earlier in the year.

Catering's share of garden centre turnover rose to 18% in 2025, up from 14% in 2023. Growth was driven by higher footfall in cafes and restaurants, alongside above-inflation price increases for catered goods.

The remaining categories were flat or similar to previous years in terms of their share of turnover.

	2025	2025 (excl. Catering)	2024	2023
Live plants, bulbs, & seeds	24%	29%	25%	26%
Catering	18%	-	15%	14%
Other non-garden products	9%	11%	9%	9%
Garden care & maintenance	8%	10%	8%	8%
Outdoor living	7%	8%	7%	8%
Homewares & floristry	7%	8%	7%	7%
Garden containers & structures	6%	7%	6%	6%
Food & farm shop	6%	7%	6%	6%
Christmas	6%	7%	6%	6%
Gifting	5%	6%	5%	5%
Wild bird care, pets, & aquatics	3%	4%	3%	3%
Other garden products	2%	2%	2%	2%

Market Update December 2025

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Key Points

December 2025

Overall garden centre sales rose by +2% from December 2024

Catering sales Increased by +7% from December 2024

Overall consumer confidence rose by 2 pts, remaining steady yet low for the eighth consecutive month

Average transaction values were lower in December 2025 than in December 2024 or 2023.

Christmas sales slowed down in December 2025, down -5% from December 2024

Garden Centre Sales

December 2025

Garden centre sales grew modestly in December 2025, with total sales up 2% on 2024 and 5% on December 2023.

The timing of Christmas meant that December had only three weekends before the holiday period. This mirrored 2024 but likely held back growth versus 2023, which had four pre-Christmas weekends.

Non-gardening sales outperformed gardening by value, rising 2% on 2024 versus a 1% decline. Gardening sales were particularly affected by weak indoor plant sales in December 2025 (for more information, see page 14).

Nonetheless, volumes for both categories were higher than in 2023 and 2024, reflecting strong consumer demand. With volumes generally outpacing values, this suggests consumers were looking for lower-value items and discounts, compared to previous years.

	December 2025 vs 2024		December 2025 vs 2023	
	Sales Value *(£, Exc. VAT)*	**Sales Volume** *(n)*	**Sales Value** *(£, Exc. VAT)*	**Sales Volume** *(n)*
Overall *Incl. catering*	▲ 2%	▲ 2%	▲ 5%	▲ 7%
Overall *Excl. catering*	▲ 2%	▲ 2%	▲ 3%	▲ 4%
Garden/ gardening	▼ 1%	▲ 1%	▲ 1%	▲ 4%
Non-garden/ gardening *Incl. catering*	▲ 2%	▲ 2%	▲ 6%	▲ 7%
Non-garden/ gardening *Excl. catering*	▲ 2%	▲ 2%	▲ 4%	▲ 4%

Source: HTA Garden Retail Monitor. Figures reported may vary month to month, due to changes in the makeup of the sample.
HTA endeavours to adopt the most suitable approach that provides a robust assessment of the current market.

Average Transaction Values (ATVs) and Transaction Numbers

Garden Centre (excluding café/restaurant); December 2025

Garden centre transactions were up by +3% in December 2025 compared to 2024, and +6% compared to 2023.

The increase in total transactions will have influenced the increases in sales volume observed on page 11, and further implies strong footfall in garden centres during December.

Average transaction values (excluding VAT) fell slightly to £25.51, down from £25.62 in 2024 and £25.94 in 2023, suggesting consumers were opting for lower-priced items.

December ATVs have trended down since 2023, although fewer pre-Christmas weekends in both 2024 and 2025 likely played a significant role, especially as Novembers' ATVs have risen moderately for consecutive years.

Total Transactions
(Garden Centre):

3%
2025 v 2024
(December)

6%
2025 v 2023
(December)

Average Transaction Values (ATVs)
(Garden Centre):

Excl. VAT
£ **25.51**

Incl. VAT
£ **29.78**

December 2025 vs 2024 (Excl. VAT)	December 2025 vs 2023 (Excl. VAT)
▼ 0% (£25.62)	▼ 2% (£25.94)

Average Transaction Values (ATVs) and Transaction Numbers

Café/Restaurant; December 2025

Garden centre café and restaurant transactions increased by +6% between December 2025 and 2024, and +13% since December 2023.

Catering sales continue to perform well, with increased footfall in December 2025 resulting in +7% sales value growth (see page 15).

The average transaction value in cafes was £13.52 in December 2025, up +1% from 2024 and +3% from 2023.

This growth was behind price increases of catering goods, further suggesting that garden centre visitors kept a close eye on their spending in December 2025.

Total Transactions
(Café/Restaurant):

	2025 v 2024 (December)	2025 v 2023 (December)
Change	▲ 6%	▲ 13%

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

		December 2025 vs 2024 (Excl. VAT)	December 2025 vs 2023 (Excl. VAT)
Excl. VAT	£13.52	▲ 1% (£13.41)	▲ 3% (£13.10)
Incl. VAT	£16.22		

Source: HTA Garden Retail Monitor

Gardening Products

Sales by value; December 2025

Overall, December 2025's gardening sales were down -1% compared to 2024, but up +1% compared to 2023.

Indoor plant sales fell by -13% compared to 2024, and -15% compared to 2023. Given that indoor plant sales make up between a quarter and a fifth of all gardening sales in December, this was a key factor behind the weaker sales performance of the overall gardening category.

In contrast, hardy plant sales were strong in December 2025 – up +18% from 2024 and +15% from 2023. Hardy plants are the third-largest gardening category, so this strong performance went a long way to counteract the weaker indoor plant sales.

Meanwhile, bulb and seed sales continued to be strong in December 2025, although both start from a low base. Nevertheless, it may indicate keen consumer appetite for gardening in the coming spring.

Category	December 2025 vs 2024	Dec YTD 2025 v 2024	December 2025 vs 2023
Bedding & other plants	▲ 4%	▲ 11%	▲ 13%
Hardy plants, shrubs & trees	▲ 18%	▲ 7%	▲ 15%
Indoor plants	▼ 13%	▼ 2%	▼ 15%
Seeds (excl. grass seed)	▲ 19%	▲ 7%	▲ 8%
Bulbs	▲ 25%	▲ 13%	▲ 47%
Plant care products	▲ 7%	▲ 10%	▲ 16%
Garden tools & equipment	▼ 3%	▲ 12%	▼ 9%
Outdoor containers	▲ 2%	▲ 8%	▲ 11%
Garden sundries	▼ 2%	▲ 5%	▼ 6%
Garden features & structures	▼ 4%	▲ 12%	▲ 2%

Source: HTA Garden Retail Monitor

Non-Gardening Products

Sales by value; December 2025

December 2025 saw non-gardening sales rise by +2% from 2024 and +6% from 2023.

Catering sales continued to grow steadily in December 2025, up +7% from 2024 and +16% from 2023. Both food & farm shop and gifting also grew steadily, suggesting consumers increasingly are turning to garden centres to buy gifts for friends and family in the festive season.

In contrast, Christmas sales (e.g. Christmas trees, novelties, lights, and decorations) were weaker in December 2025, down -5% from 2024 and -3% from 2023. This was likely due to the last days of November falling on a weekend, pulling early tree and decoration purchases into November. The year-to-date sales for Christmas items was still up +3% compared to 2024.

Wild bird care also continued to sell below previous years, as had been the case for most of 2025. With consumers feeling pressure on their budgets, their spending remains focussed on themselves those close to them.

Category	December 2025 vs 2024	Dec YTD 2025 v 2024	December 2025 vs 2023
Catering	▲ 7%	▲ 10%	▲ 16%
Christmas	▼ 5%	▲ 3%	▼ 3%
Food & farm shop	▲ 10%	▲ 12%	▲ 14%
Indoor living & homewares	(=) 0%	▲ 9%	▼ 2%
Wild bird care	▼ 6%	▼ 2%	▼ 8%
Pets	▼ 3%	▲ 2%	▲ 2%
Gifting	▲ 6%	▲ 8%	▲ 11%

Source: HTA Garden Retail Monitor

Category Shares by Value

December 2023-2025

Christmas products made up just under a quarter of December 2025's turnover, down by -3% from 2024 and 2023.

Comparatively, catering's share of turnover has grown year on year, rising from 13% in 2023 to 17% in 2025. This highlights how product diversification outside of the core gardening season helps garden centres maintain strong cashflow during months when gardening sales are typically weaker.

Overall, gardening products made up 13% of December's turnover when including catering, and 15% of turnover when excluding catering.

The share held by live plants weakened in December 2025, following weaker sales of indoor plants compared to previous years.

	December			
	2025	2025 (excl. Catering)	2024	2023
Christmas	24%	29%	27%	27%
Catering	17%	–	14%	13%
Other non-garden products	13%	15%	13%	13%
Food & farm shop	11%	13%	11%	10%
Homewares & floristry	9%	11%	10%	11%
Gifting	8%	9%	8%	7%
Live plants, bulbs, & seeds	7%	9%	8%	8%
Wild bird care, pets, & aquatics	3%	4%	3%	3%
Garden containers & structures	2%	2%	2%	2%
Garden care & maintenance	2%	2%	2%	2%
Other garden products	1%	1%	1%	1%
Outdoor living	1%	1%	1%	1%

Source: HTA Garden Retail Monitor
Please not that totals may not add up to 100% due to rounding

Year-to-Date Sales

Calendar year to December 2025

Following a steady December, the average sales positions of garden centres in 2025 finished +9% ahead of 2024 and +10% ahead of 2023.

Sales growth was broadly consistent across departments compared to 2024, up +9% for both gardening and non-gardening (including catering).

Compared to 2023, sales growth was more varied across departments. Non-gardening sales rose by +15%, in contrast to gardening sales which only rose by +4%.

Overall, garden centres finished 2025 with much stronger sales than in 2024 and 2023. However, many garden centres will find themselves needing increases of 10-15% in order to maintain profit margins from previous years, due to increases in operating costs such as minimum wages and NICs.

	Overall *Incl. catering*	**Overall** *Excl. catering*	**Garden/ Gardening**	**Non-garden /gardening** *Incl. catering*	**Non-garden /gardening** *Excl. catering*
YTD Dec 2025 vs YTD Dec 2024	▲ 9%	▲ 8%	▲ 9%	▲ 9%	▲ 8%
YTD Dec 2025 vs YTD Dec 2023	▲ 10%	▲ 7%	▲ 4%	▲ 15%	▲ 12%

(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/

Source: HTA Garden Retail Monitor. Figures reported may vary month to month, due to changes in the makeup of the sample. HTA endeavours to adopt the most suitable approach that provides a robust assessment of the current market.

National Weather

December 2025 v December 2024

The UK's mean temperature in December 2025 was warmer than average by +1.6°C, although it was slightly cooler than in December 2024.

Compared to the long-term average, December 2025 received a typical amount of sunshine and rainfall.

The majority of rain fell in the first half of December 2025, with Storm Bram affecting the North and West of the UK.

Weather conditions dried up considerably in the second half of the month, resulting in a below average number of rainy days.

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.

	December 2025	December 2024	Long-term average (1991-2020)
Mean temperature (°C)	5.8	6.2	4.2
Hours of sunshine	46.1	24.2	42.5
Total Rainfall (mm)	128.9	145.3	127.2
No. of rain days (>1mm/day)	14.9	15.5	15.6

Source: MET Office

Regional Weather

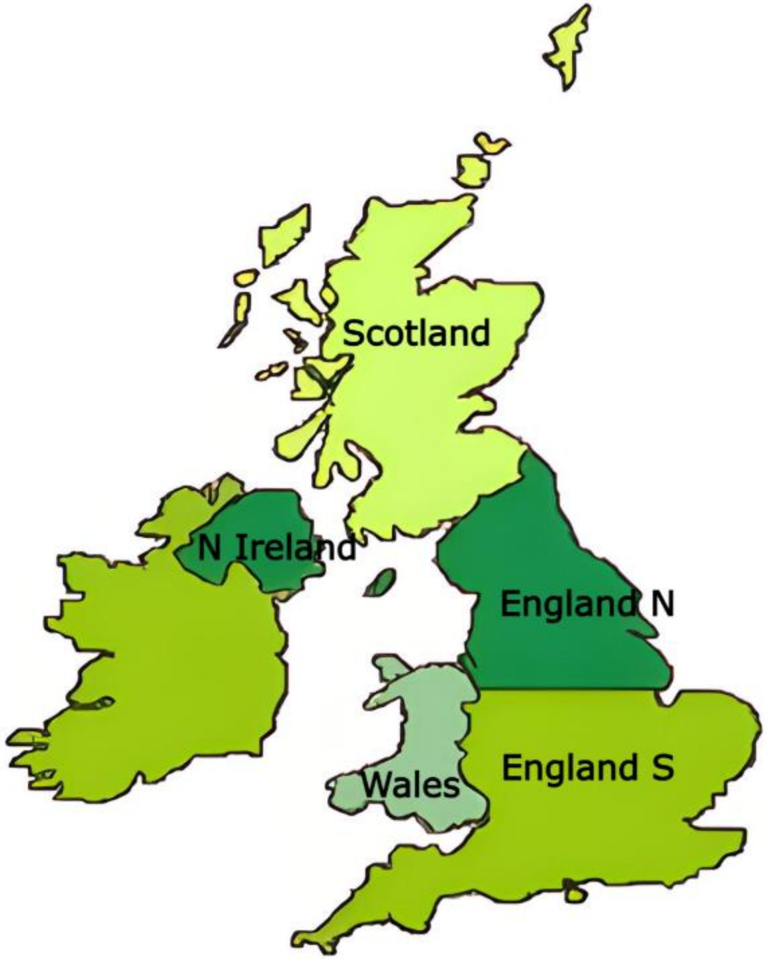
December 2025

December 2025's mean temperature was above average across all regions of the UK.

The highest mean temperatures were recorded in the south of England, at 6.7°C (+1.9°C above average), whilst the coolest mean temperature was 4.3°C in east Scotland (1.8 °C above average).

Meanwhile, the wettest conditions were found in the south-west of England and south Wales, receiving 131% of the average for the area. Comparatively, East Anglia was much drier, receiving only 96% of the average rainfall for the month.

Region	**Mean Temp** (°C)	**Hours of sunshine**	**Rainfall** (mm)	**Rain days** (> 1mm)
Overall	**5.8**	**46.1**	**128.9**	**14.9**
Scotland	4.6	27.1	153.2	16.6
Northern Ireland	5.9	45.2	101.0	16.3
North England	6.0	40.3	115.8	14.4
South England	6.7	65.2	99.9	12.7
Wales	6.3	52.1	202.7	17.3



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

Water Availability

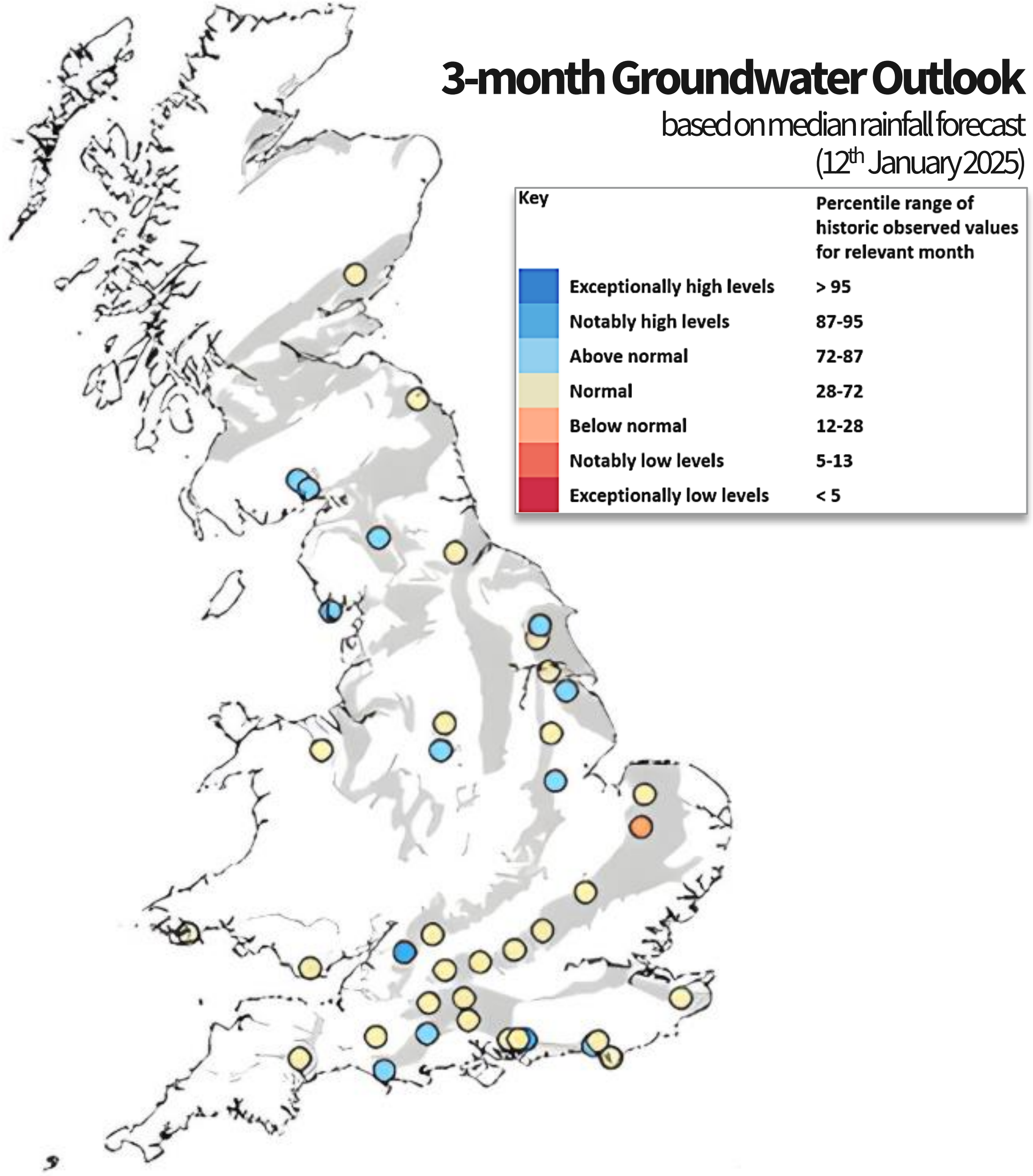
River and Groundwater Levels

Groundwater levels continue to normalise across the UK, with 75% of sites seeing an increase in groundwater levels following slightly-above average rainfall over the past couple of months.

Almost all groundwater sites were classed as being at least ‘normal’ for this time of year, with a couple of exceptions in the east and southeast of England.

River flows also increased at almost all indicator sites in December 2025, with the exceptions of the Rivers Burn, Ely Ouse, and Cam – all in East Anglia – which were classed as being ‘below normal’.

In contrast, river flows in the southwest of England were exceptionally high, with four rivers recording their highest rate of flow for December since records began in the 1960s.



Source: UK Centre for Ecology and Hydrology (UKCEH)

Reservoir Levels

England and Wales

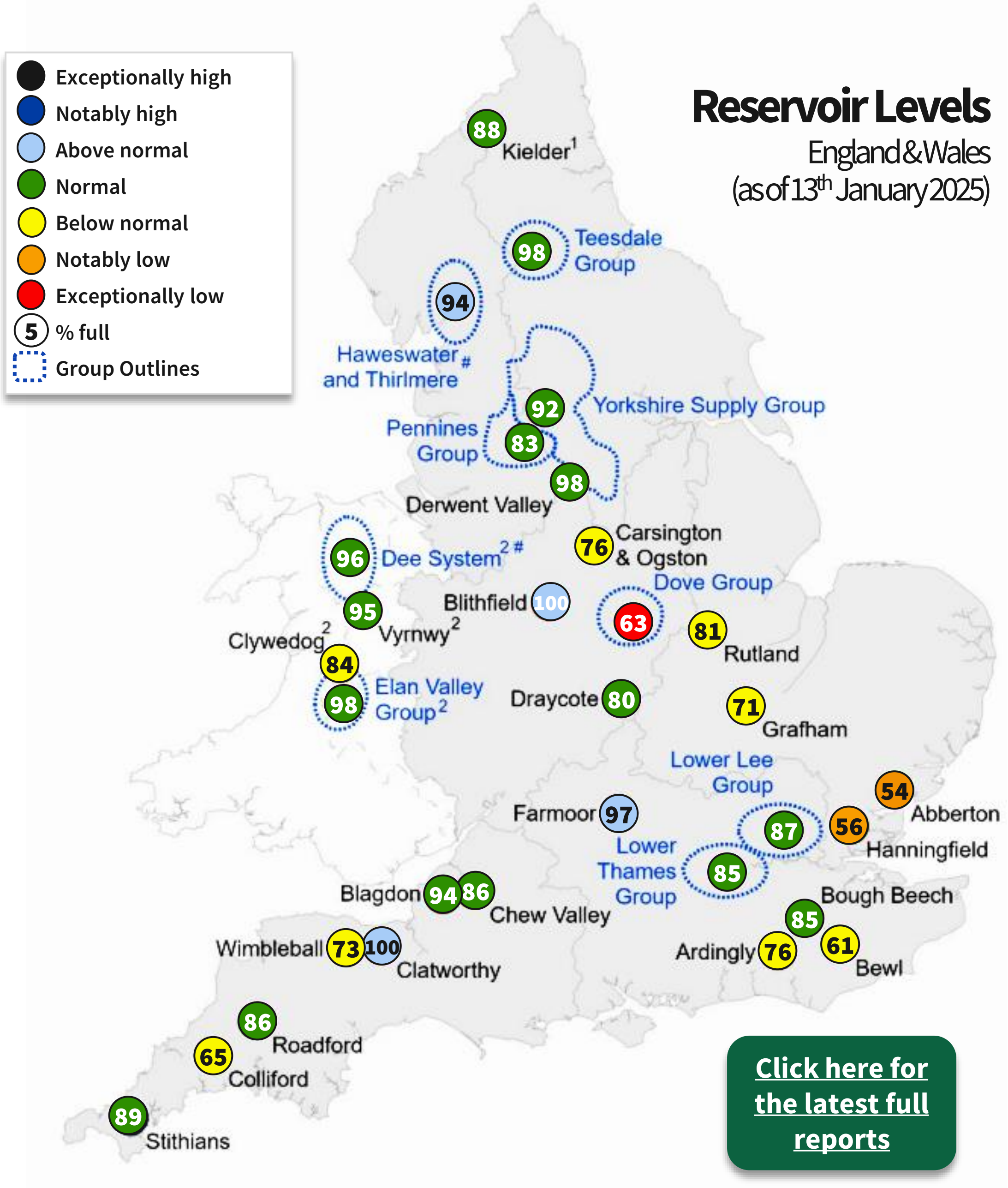
In December 2025, reservoir levels increased at nearly every recorded site. More than half of all reservoirs were classed as being normal for the time of year.

Overall, storage at the end of December 2025 was 86.4%, having increased by +7% throughout the month.

Eight reservoirs were classed as below normal for December – half of which were in the southeast of England. Within this region, reservoirs were at 71.2% of capacity at the end of 2025.

The HTA continues 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**.

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**.



Click here for the latest full reports

Source: Environment Agency

UK Consumer Confidence

Consumer confidence rose by +2pts in December 2025, as consumers were less affected by the Autumn Budget than anticipated.

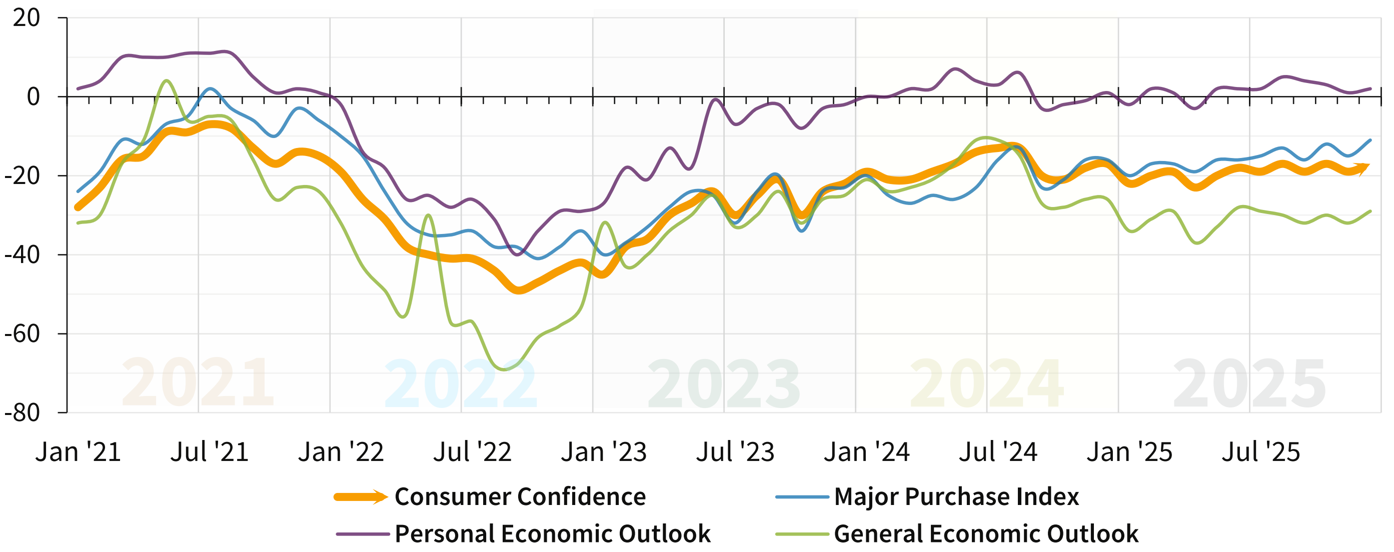
Since September 2024, personal economic outlooks have generally trended upwards, while general economic outlooks have trended downwards.

In December 2025, the overall index score remained muted at -17pts – equal to December 2024. Both personal and general economic outlooks improved from November 2025, up +1pt and +3pts respectively.

Meanwhile, the major purchase index rose by +4pts to -11pts, its highest level since the pandemic, indicating more consumers see now as a good time to make large one-off purchases (e.g., white goods or garden furniture).

The savings index held steady from November 2025 at +24pts, up +3pts year-on-year.

	Score (Dec 2025)	**Change vs Nov 2025**	**Change vs Dec 2024**
Overall Consumer Confidence Index	**-17**	**▲ 2**	**– 0**
Personal financial outlook (next 12 months)	2	▲ 1	▲ 1
General economic outlook (next 12 months)	-29	▲ 3	▼ 3
Major Purchase Index	-11	▲ 4	▲ 5
Savings Index	24	– 0	▲ 3



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.
Source: NIQ & GfK; Base: 2,003 UK Individuals aged 16+, interviewed December 1st - December 11th, 2025.

Consumer Spending

December 2025

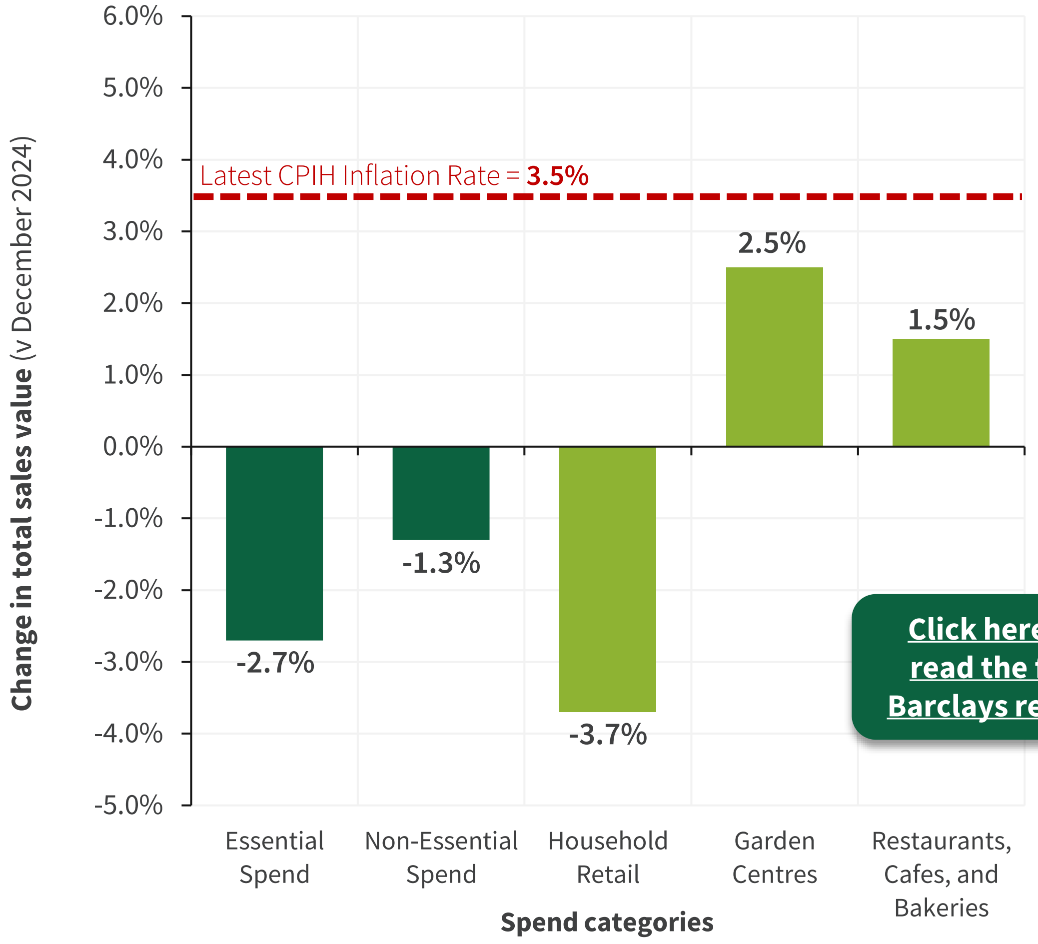
Garden centres bucked the December trend for consumer spending, with card transaction values up +2.5%. Overall spending fell -2.7% on essentials and -1.3% on non-essentials.

This data is based on actual card payment transactions, aggregated by Barclays, reflecting actual consumer behaviour in December 2025.

Barclays reported +2.5% growth for garden centres, closely matching our +2% figure for December 2025, despite Barclays' data not including cash transactions.

Garden centres outperformed all other household retail sectors in December 2025, which saw spending decrease across the board, resulting in an average of -3.7%.

Garden centre café and restaurant sales also vastly outpaced the wider hospitality sector, which only saw sales growth of +1.5% in December 2025, compared to +7% in garden centre catering.



Click here to read the full Barclays report

Essential spend includes groceries, childcare, healthcare, insurance, fuel, and public transport. Non-essential spend includes all other purchases.

Source: Barclays Consumer Spending Report
Based on Barclays debit and credit card transactions between 25th October 2025 and 21st December 2025.

Inflation and Wages

CPIH inflation fell from 3.8% to 3.5% in December, following the Bank of England's cut to interest rates on December 18th, 2025.

Since we last published Market Update, no new figures for pay growth or unemployment have yet been published. However, the April increases to the National Minimum Wage and the National Living Wage are expected to push up pay in wider brackets as businesses maintain their pay structure.

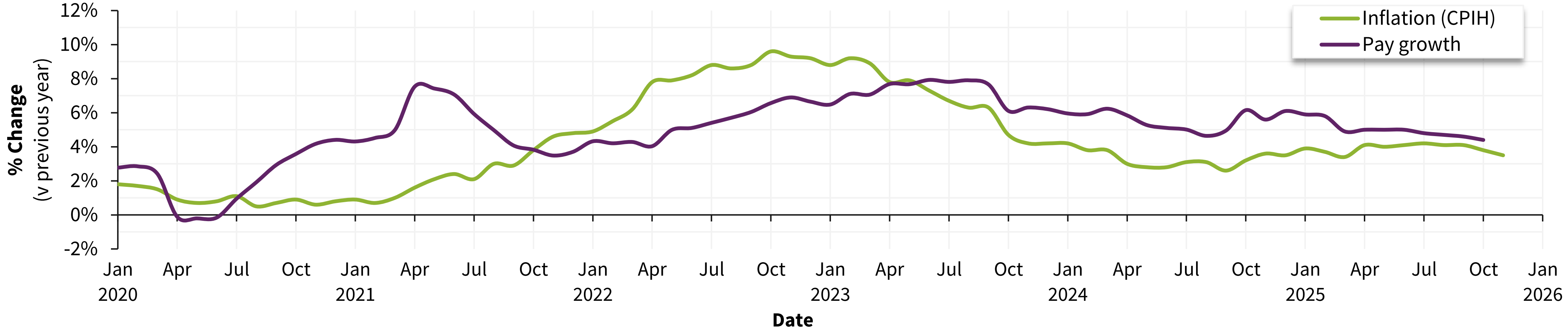
The falling inflation rate will continue to alleviate pressures on workers' pay, with the hope that the gap between pay growth and inflation continues to widen in the coming months.

Meanwhile, the most recent unemployment figure remains at a post-pandemic high of 5.1%. This remains well below historic highs of +8% or greater from past unemployment crises, and similar to pre-2008 levels of unemployment.

Inflation (CPIH; Nov 2025) = **+3.5%**

Regular Pay Growth (Aug-Oct 2025) = **+4.4%**

Unemployment rate (Aug-Oct 2025) = **5.1%**



Source: Office for National Statistics

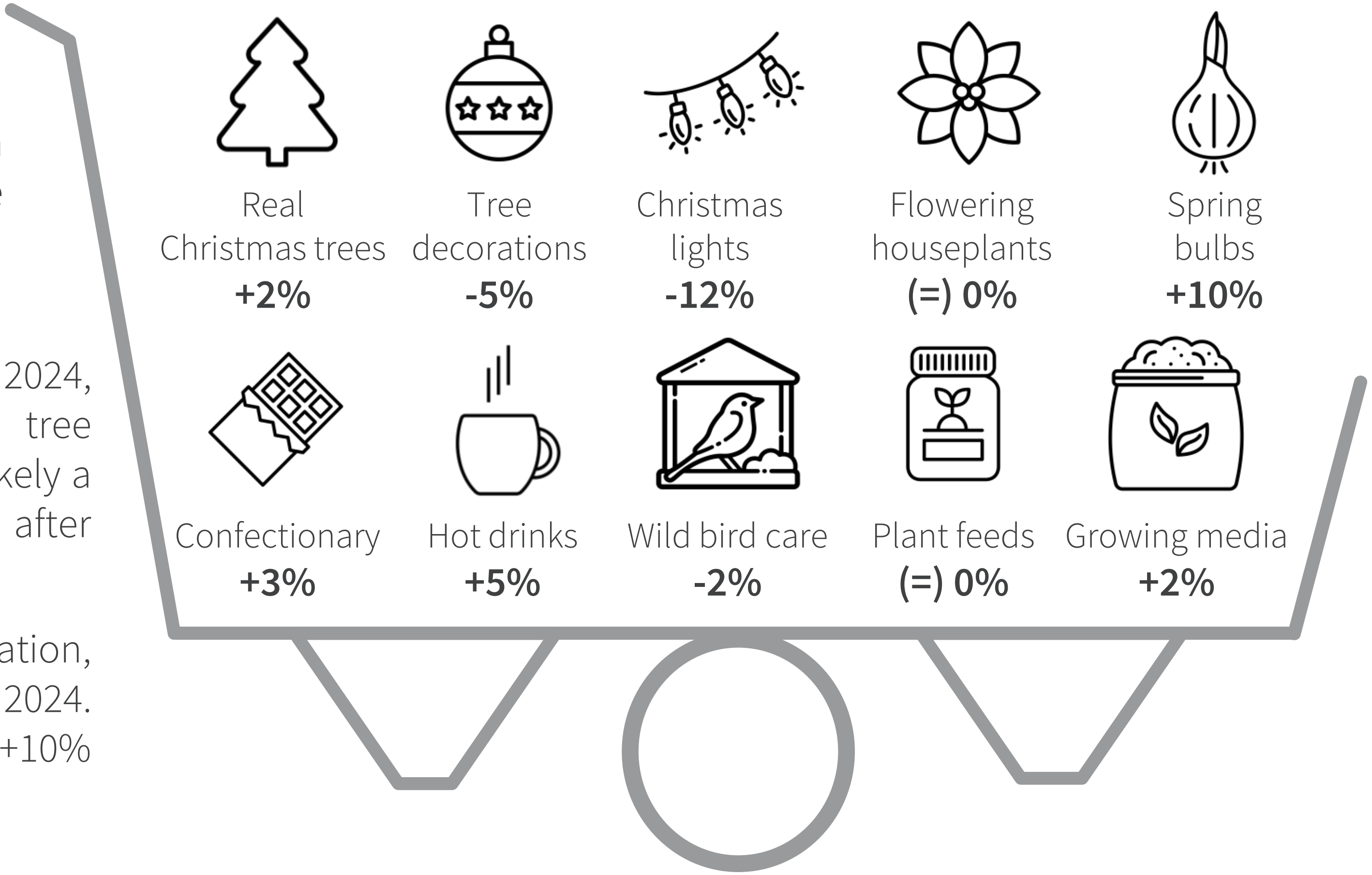
Retail Inflation: December 2025 v 2024

Median inflation rate by category

We compared prices for a selection of garden centre items between December 2025 and December 2024, calculating the **median inflation rate** for each category in our seasonal trolley. The trolley represents the most-commonly purchased goods in garden centres during December 2025.

Real Christmas trees sold for +2% more than in 2024, whilst there was significant price falls for tree decorations (-5%) and Christmas lights (-12%) – likely a product of discounting from both before and after Christmas.

Hot drinks continue to show moderate price inflation, up +5% on average compared to December 2024. Spring bulb prices have also risen notably, up +10% year-on-year.



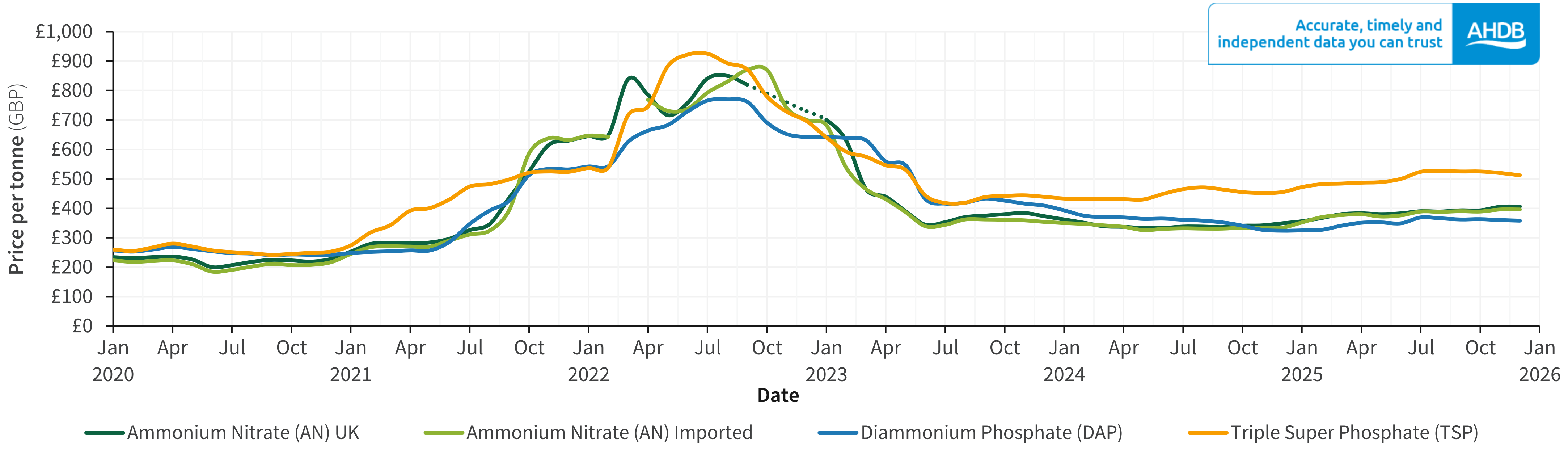
UK Fertiliser Prices

Prices of fertiliser components have remained broadly stable for the last 6 months, with no substantial price increase for any tracked component.

Compared to December 2024, tracked fertiliser components have increased in price by between +10% and +18%, with the largest price increases having occurred across Q1 2025.

Given that fertiliser component prices have risen notably over the past 12 months, prices of fertilisers may rise so that manufacturers maintain their current profit margins.

However, prices of fertilisers and plant feeds sold by garden centres have risen below inflation, indicating that these price rises are not currently being passed on to consumers.



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.

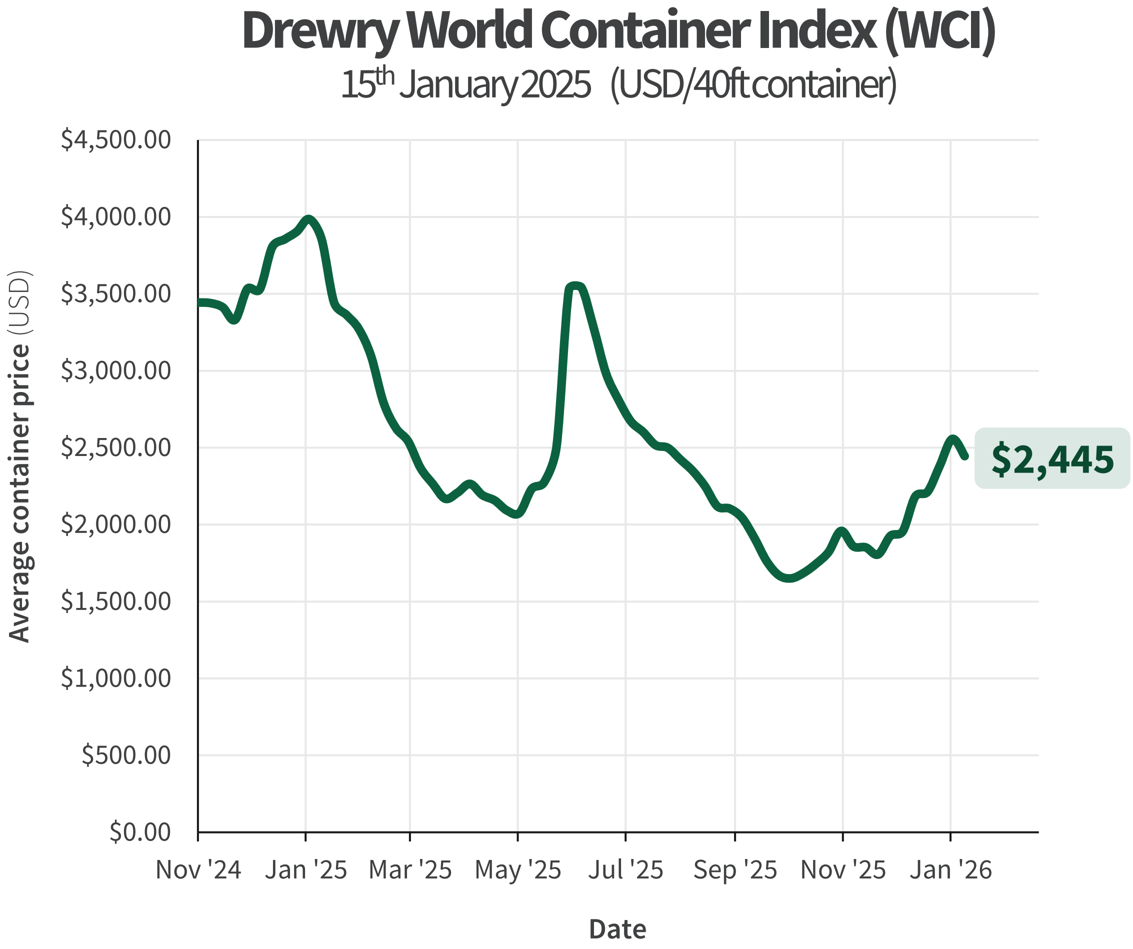
Shipping Container Prices

We track a composite index of major shipping costs across global routes each month. As of January 15, 2025, the Drewry World Container Index stood at $2,445 per 40ft container, down -37% from January 2024.

Spot rates have been volatile in recent weeks. Drewry attributed the recent hike in rates to “opportunistic” pricing.

The -4% fall in rates seen this week is indicative of weak demand, despite upward pressure on spot rates resulting from the Chinese New Year.

Meanwhile, carriers have put on hold plans to resume transits via the Red Sea, following the protests in Iran and risk of US military intervention in the region.



Source: Drewry World Container Index (WCI)

Closing Comments

Get in touch

We hope you enjoyed the format and content of January 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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