



Market Update

February 2026 Edition

Reviewing January 2026

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Overview

- Garden centre sales in January 2026 increased by +6% from January 2025 and +8% from January 2024, despite cold and wet weather conditions throughout the month.
- The UK saw exceptionally heavy rainfall in most regions across January 2026 - as much as +88% above average in some regions due to storms Goretti, Ingrid, and Chandra. In light of this, January's sales growth is particularly significant.
- But as a result, gardening sales were mixed, up +4% from January 2025 but down -4% from January 2024. However, sales of seeds and bulbs were particularly strong on prior years, indicating strong consumer demand ahead of the coming gardening season.
- Total garden centre transactions rose by +5% from January 2025, and +7% from January 2024, further underlining consumers' keenness for gardening.
- In contrast, average transaction values rose marginally by +2% from January 2025, below the current rate of inflation. This suggests that sales growth was driven by greater footfall, and that consumers are keeping a close eye on their spending.
- The overall consumer confidence index increased by +1pt in January 2026 from December 2025, reaching -16pts overall for the first time since August 2024. This marks 10 years of consumer confidence being below 0pts overall. Consumers' outlooks on their personal finances continues to improve, while perceptions of the wider economy remain in decline.
- Garden centres have started 2026 well, although January is small in the context of the full year. There are signs that consumers are keener than usual ahead of the gardening season, although a lot rests on future weather conditions and consumer confidence in the coming Spring.

Read on for all the detail...

Key Points

January 2026



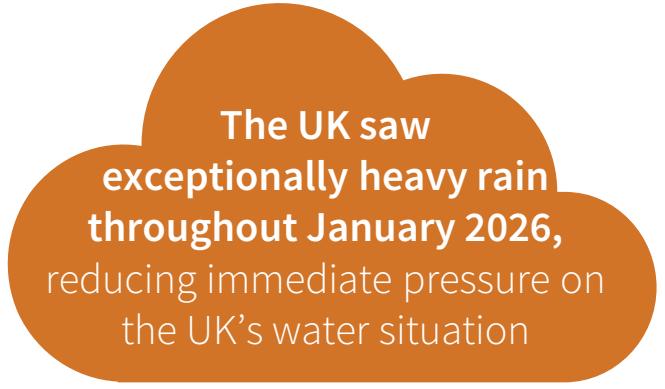
Overall garden centre sales rose by **+6%** from January 2025



Average transaction values only grew by **+1-2%** compared to January 2025 and 2024



Gardening sales were muted, as sales rose +4% from January 2025 but fell -4% from January 2024



The UK saw exceptionally heavy rain throughout January 2026, reducing immediate pressure on the UK's water situation



Overall consumer confidence rose by **1pt**, reaching its highest level since August 2024.

Garden Centre Sales

January 2026

Garden centre sales got off to a fast start in 2026, with sales by value up +6% from January 2025 and +8% from January 2024. January is one of the smallest months for garden centre sales, however, a strong start indicates good consumer demand ahead of the coming gardening season.

Gardening sales were mixed, up +4% by value from January 2025, but down -4% from January 2024. The poor weather throughout January likely hampered gardening sales (see pages 11 & 12), mirroring the poor weather conditions in January 2025 that led to weaker plant sales.

Non-gardening sales were more positive, up +6% from January 2025 and +13% from January 2024. Strong demand for food & farm shop items carried over from December, while indoor homewares sales also continued to grow steadily.

	January 2026 vs 2025		January 2026 vs 2024	
	Sales Value (£, Exc. VAT)	Sales Volume (n)	Sales Value (£, Exc. VAT)	Sales Volume (n)
Overall <i>Incl. catering</i>	▲ 6%	▲ 2%	▲ 8%	▲ 3%
Overall <i>Excl. catering</i>	▲ 6%	▲ 7%	▲ 7%	▲ 7%
Garden/ gardening	▲ 4%	▲ 7%	▼ 4%	▼ 2%
Non-garden/ gardening <i>Incl. catering</i>	▲ 6%	▲ 1%	▲ 13%	▲ 5%
Non-garden/ gardening <i>Excl. catering</i>	▲ 7%	▲ 7%	▲ 14%	▲ 12%

Average Transaction Values (ATVs) and Transaction Numbers

Garden Centre (excluding café/restaurant); January 2026

Garden centre transactions rose by +5% in January 2026 compared to 2025, and +7% compared to 2024.

Increases to total transactions indicate strong consumer demand for gardening, although visitor numbers probably differed by localised weather conditions (see more on pages 11 & 12)

Total Transactions
(Garden Centre):



2026 v 2025
(January)



2026 v 2024
(January)

January 2026's ATV (excluding VAT) was £19.39, +2% higher than 2025 (£19.09) and +1% more than 2024 (£19.27). However, this increase was well below the current rate of inflation (+3.6%).

ATVs are typically lowest in January, as consumers shop around for post-Christmas discounts and bargains.

Average Transaction Values (ATVs)
(Garden Centre):

Excl. VAT
£ 19.39
Incl. VAT
£ 22.65

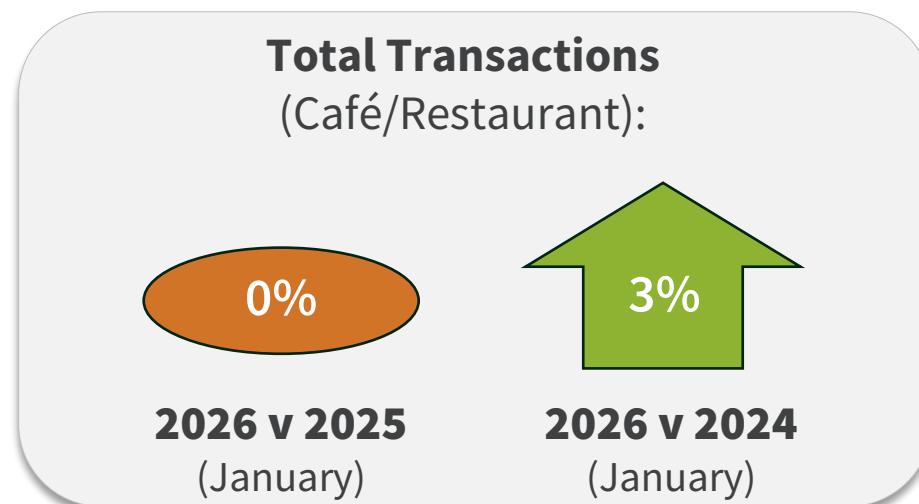
January 2026 vs 2025 (Excl. VAT)	January 2026 vs 2024 (Excl. VAT)
▲ 2% (£19.09)	▲ 1% (£19.27)

Average Transaction Values (ATVs) and Transaction Numbers

Café/Restaurant; January 2026

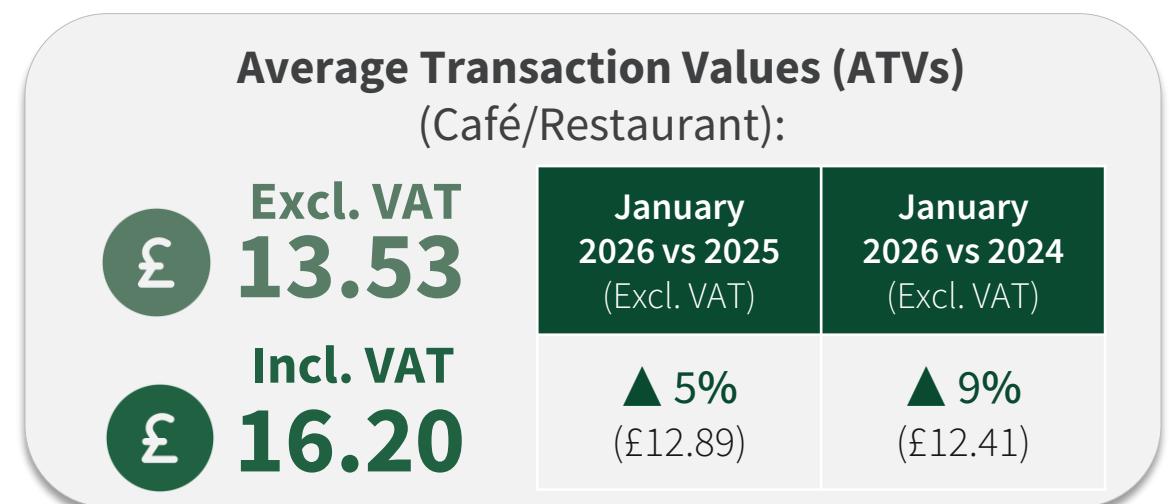
Garden centre catering saw similar footfall to previous years in January 2026, with visits flat on 2025 and up +3% from 2024.

Catering sales grew by +5% between January 2026 and January 2025 (page 9), all of which was driven by increased average transaction values - up +5% from January 2025.



As observed on page 18, catering goods have seen price increases in the past year, as garden centres seek to maintain profit margins considering increasing overhead costs.

Therefore, it is unlikely that the increase in ATVs is a result of consumers buying more but is reflective of higher prices.



Gardening Products

Sales by value; January 2026

Overall, January 2026's gardening sales were up +4% compared to 2025, but down -4% compared to 2024.

Following weak outdoor plant sales in January 2025, sales recovered somewhat in 2026. Bedding sales were up +14% and hardy plant sales rose by +9% from 2025, although both remained behind January 2024 levels.

Indoor plant sales continue to lag behind previous years, as was the case in November and December.

In contrast, seed and bulb sales continue to outperform previous years by a considerable margin, increasing by +20% and +13% respectively compared to January 2026.

This further underlines consumers' keenness for gardening, as consumers start to prepare their gardens ahead of the core gardening season. It could also indicate that consumers are looking to invest in their gardens in the short term, to lower their overall spending in the long term.

Category	January 2026 vs 2025	January 2026 vs 2024
Bedding & other plants	▲ 14%	▼ 0%
Hardy plants, shrubs & trees	▲ 9%	▼ 2%
Indoor plants	▼ 0%	▼ 5%
Seeds (excl. grass seed)	▲ 20%	▲ 16%
Bulbs	▲ 13%	▲ 20%
Plant care products	▲ 7%	▼ 5%
Garden tools & equipment	▲ 1%	▼ 3%
Outdoor containers	▲ 10%	▼ 4%
Garden sundries	▼ 0%	▼ 0%
Garden features & structures	▼ 7%	▼ 8%

Non-Gardening Products

Sales by value; January 2026

January 2026 saw non-gardening sales grow considerably, up +6% from 2025 and +13% from 2024 by value.

January's catering sales continued to grow year on year, up +5% from 2025 and +12% from 2024, although this is moderately driven by price increases, as detailed on page 7.

Food and farm shop sales also continued to perform well, following strong sales across the Christmas period. Sales by value were up +12% from 2025 and +25% from 2024.

Demand for wild bird care items appeared to still be in decline, with sales down -5% from both January 2025 and 2024, mirroring the trend seen throughout most of 2025.

Lastly, January Christmas sales fell by -4% from 2025, and -1% from 2024. In contrast, Christmas volumes were up +8% and +11% respectively in January 2026, suggesting remaining Christmas stock was discounted more aggressively than usual.

Category	January 2026 vs 2025	January 2026 vs 2024
Catering	▲ 5%	▲ 12%
Food & farm shop	▲ 12%	▲ 25%
Indoor living & homewares	▲ 11%	▲ 12%
Wild bird care	▼ 5%	▼ 5%
Pets	▲ 3%	▲ 15%
Gifting	▲ 8%	▲ 11%
Christmas	▼ 4%	▼ 1%

Category Shares by Value

January 2024-2026

Catering sales made up 25% of January 2026's turnover in Garden centres. Café and restaurant sales have grown increasingly prevalent, rising each year from 18% in January 2024.

The proportion of garden centre sales of live plants, bulbs, and seeds held steady from previous years, at 14% of turnover including catering and 19% of turnover excluding catering.

Categories that declined in prevalence due to catering's growth were wild bird care, garden care, Christmas, and outdoor living.

Wild bird care sales have generally been trending downwards for the past 12 months.

Meanwhile, garden furniture sales are minimal in January, and are usually made up of heavily discounted or end-of-line stock.

	January			
	2026	2026 (excl. Catering)	2025	2024
Catering	25%	–	23%	18%
Live plants, bulbs, & seeds	14%	19%	14%	16%
Other non-garden products	12%	16%	11%	11%
Homewares & floristry	10%	13%	10%	10%
Food & farm shop	8%	10%	8%	7%
Wild bird care, pets, & aquatics	6%	9%	7%	7%
Gifting	6%	8%	6%	6%
Garden care & maintenance	5%	7%	6%	7%
Christmas	5%	7%	6%	6%
Garden containers & structures	4%	5%	4%	5%
Outdoor living	3%	4%	3%	4%
Other garden products	2%	2%	2%	2%

National Weather

January 2026 v January 2025

The UK saw +17% more rainfall than average in January 2026, as Storms Goretti, Ingrid, and Chandra hit throughout the course of the month.

Compared to January 2025, there was +49% more rainfall and 1.6 times the number of days of rain, however there was significant variation between regions, as detailed on page 12.

The start of January was also particularly frosty, with snow falling across much of the UK – most heavily in Scotland. The UK's mean temperature was cooler than average by -0.5°C, at 3.4°C overall.

The cold, wet, and overcast conditions presented a tough start to the year for growers, with heavy rain and limited sunlight hampering early growing activity. This was mirrored in retail, as gardening sales remained muted.

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.

	January 2026	January 2025	Long-term average (1991-2020)
 Mean temperature (°C)	3.4	3	3.9
 Hours of sunshine	47.7	61.8	47.5
 Total Rainfall (mm)	142.6	95.8	121.5
 No. of rain days (>1mm/day)	18.7	11.8	15.4

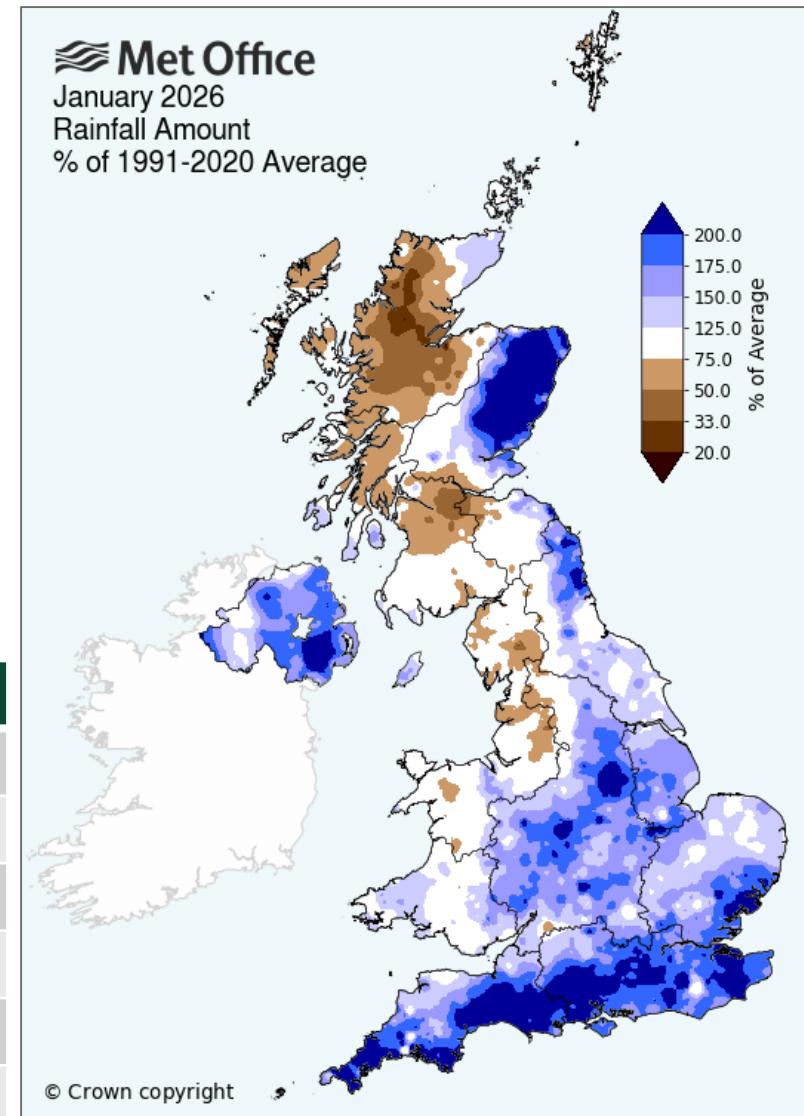
Regional Weather

January 2026

As shown by the map of rainfall in January 2026, exceptional amounts of rain were received in Eastern Scotland (+48% above average), Northern Ireland (+70%), East Anglia (+52%), and the South of England (+88%). Substantial regional differences likely impacted individual retailers' performance.

In contrast, Western Scotland and the Northwest of England were exceptionally dry. However, throughout November and December 2025, these areas were some of the wettest regions of the UK and are unlikely to be affected by dry January conditions.

Region	Mean Temp (°C)	Hours of sunshine	Rainfall (mm)	Rain days (> 1mm)
Overall	5.8	46.1	128.9	14.9
Scotland	2.2	30.0	155.2	17.5
Northern Ireland	4.1	43.5	195.6	22.9
North England	3.0	49.1	100.3	17.6
South England	4.5	63.1	136.8	18.6
Wales	4.1	50.2	175.0	23.3



Water Availability

River and Groundwater Levels

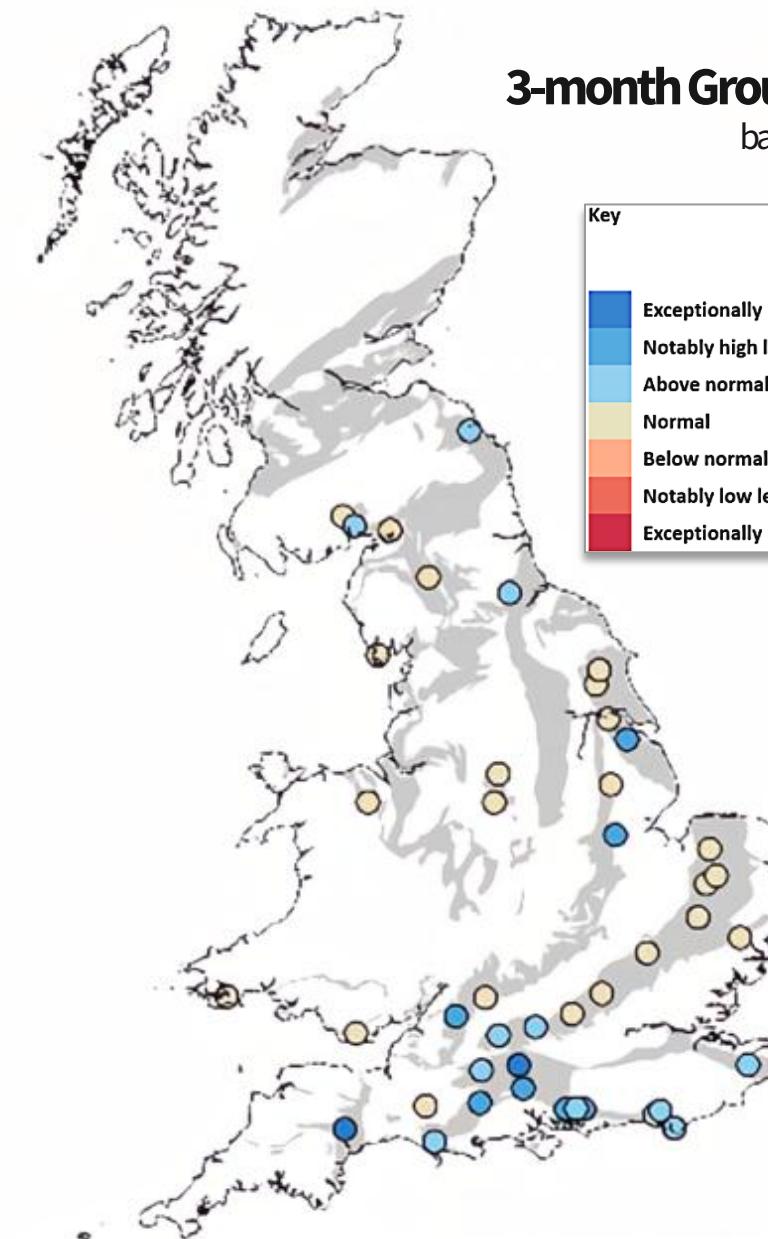
Groundwater levels increased at almost all indicator sites in January 2026.

All sites were recorded as being at least normal, while sites across the South of England ranged from groundwater levels being above normal to exceptionally high.

Groundwater levels in the East of England recovered notably, having been below normal or worse in recent months.

Meanwhile, mean river flows increased at over half of all indicator sites, most notably in the east, south-east, and south-west of England.

Only the Rivers Burn, Derwent, and Ribble were recorded as being below normal. Meanwhile, the River Tone and Middle River Stour in the south-west set monthly records for their river flows.



3-month Groundwater Outlook
based on median rainfall forecast
(5th February 2026)

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

In January 2026, most reservoirs increased their storage following heavy rainfall across most areas of England and Wales. Ten reservoirs were classed as being completely full.

Almost half of all reservoirs were classed as normal for the time of year, with many reservoirs seeing increases in storage by 10-20% of their total capacity.

Reservoirs with comparatively low levels compared to the long-term average have been drawn down to support flood alleviation, following changes to operating rules. Additionally, the Dove Group reservoir was constrained by temporary infrastructure impacts, resulting in exceptionally low water levels for this stage of the year.

Although the water situation has improved in recent months, 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](#).



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UK Consumer Confidence

Consumer confidence rose by +1pt in January 2026, resulting in the highest consumer confidence score since August 2024.

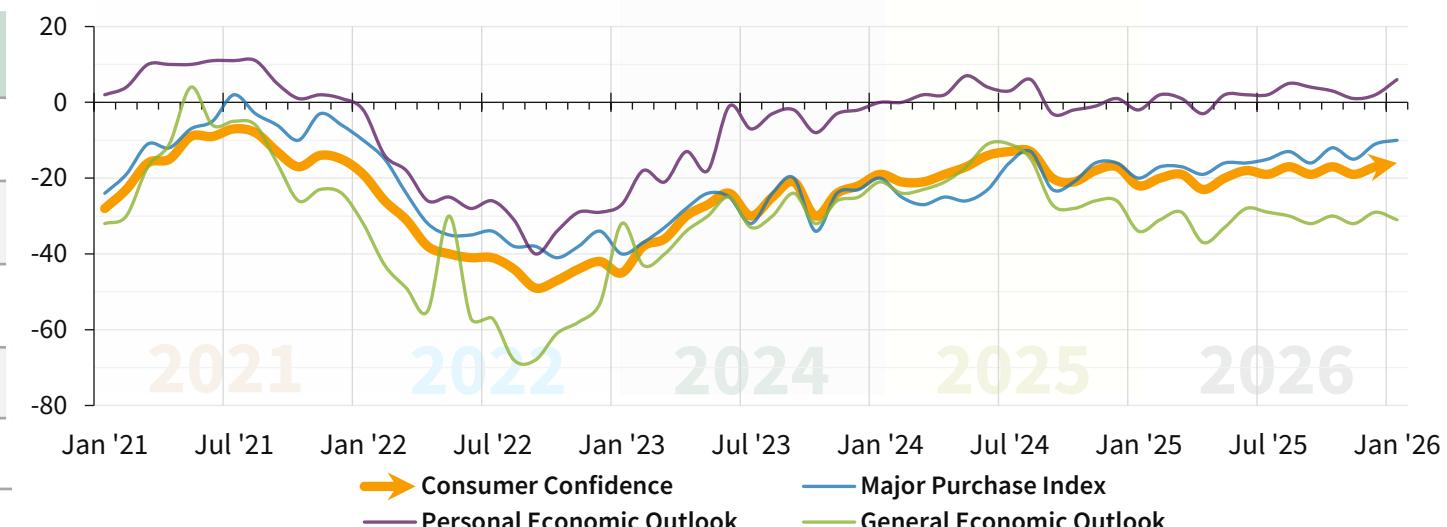
The overall index was driven by a +4pt increase in personal financial outlooks, which reached 6pts overall. This was also the highest score for personal finances since August 2024.

Additionally, the Major Purchase Index rose to -10pts overall, up +10pts since January 2025. This was the highest score since

January 2022, and suggests that consumers increasingly feel as though now is a good time to make large purchases (e.g. white goods, furniture)

In contrast, general outlooks on the economy continue to decline, falling -2pts to -31pts overall. January 2026 also marks 10 years since the general economic outlook score was above 0pts. The opposing trends between personal and general outlooks indicates a growing disconnect between consumers' actual finances and their perceptions of the wider economy.

	Score (Jan 2026)	Change vs Dec 2025	Change vs Jan 2025
Overall Consumer Confidence Index	-16	▲ 1	▲ 6
Personal financial outlook (next 12 months)	6	▲ 4	▲ 8
General economic outlook (next 12 months)	-31	▼ 2	▼ 3
Major Purchase Index	-10	▲ 1	▲ 10
Savings Index	28	▲ 4	▼ 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.

Source: NIQ & GfK; Base: 2,003 UK Individuals aged 16+, interviewed January 1st - January 11th, 2026.

Consumer Spending

January 2026

Per Barclay's card transaction spend data, garden centre sales rose by +1.4% compared to January 2025. Overall spending fell by -1.1% on essentials and rose by +1.6% on non-essentials.

This data is based on actual card payment transactions, aggregated by Barclays, reflecting actual consumer behaviour in January 2026.

The reported sales figure of +1.4% for garden centres was lower than the +7% we reported on page 5.

However, Barclay's data does not capture cash transactions, which may explain the discrepancies between sales growth figures.

Nevertheless, garden centres still outperformed all other household retail sectors in January 2026, which saw spending decrease across the board, resulting in an average of -1.4%.



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

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

Inflation and Wages

CPIH inflation rose slightly in January 2026, up +0.1% to 3.6%, although this was attributed to sector-specific price increases. Inflation is expected to continue falling in the coming months.

Regular pay growth diminished in the most recent quarter, down from 4.5% to 4.4%. However, it continues to track above inflation, alleviating the pressures of cost of living and

gradually improving consumers' spending power.

Unemployment held steady at 5.1% - a post-pandemic high. However, it remains within normal bounds for the long-term, and the employment rate remains steady. Recent growth in unemployment over the last quarter appears to have been driven by an increase in the number of unemployed men, while the number of unemployed women remains stable.



Retail Inflation: January 2026 v 2025

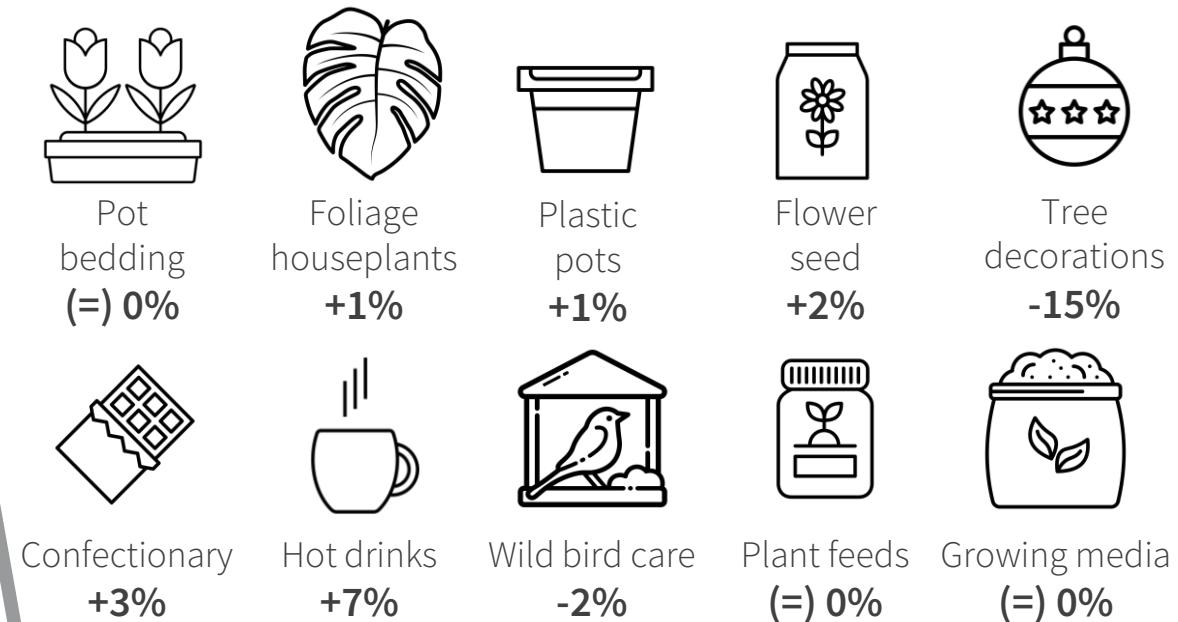
Median inflation rate by category

We compared prices for a selection of garden centre items between January 2026 and January 2025, calculating the **median inflation rate** for each category in our seasonal trolley. The trolley represents the most-commonly purchased goods in garden centres during January 2026.

Prices of gardening products generally appear stable, with pot bedding, plant feeds, and growing media prices all stable year-on-year. Plastic pots and flower seeds saw slight price increases of +1-2%.

Hot drinks continue to showcase substantial price increases ahead of inflation, up +7% since January 2025.

Tree decorations are indicative of the heavier discounting of Christmas stock in January 2026, with prices down -15% compared to the discounts seen in January 2025.



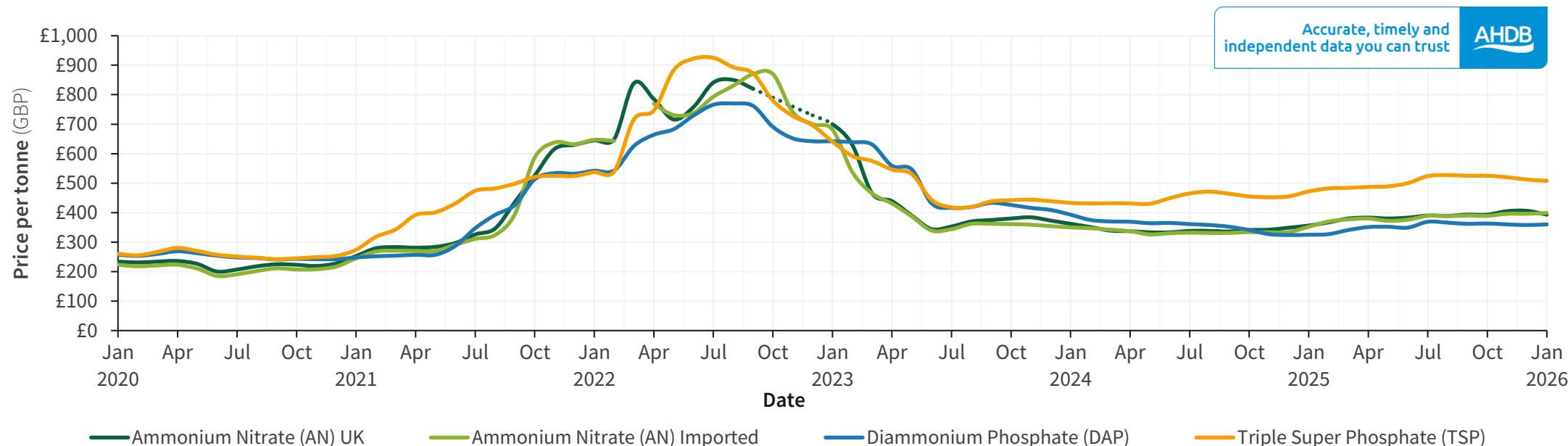
UK Fertiliser Prices

In January 2026, fertiliser prices remained broadly stable from December 2025.

Compared to January 2025, our tracked fertiliser components have increased in price by between +7% and +13%, with the largest price increases having occurred across Q1 2025. Since then, prices have remained broadly flat from month-to-

month.

Prices of sold fertilisers and plant feeds in garden centres have risen below inflation (see page 18), despite the increasing cost of components. This suggests that price rises to components are not currently being passed on to consumers and are instead being absorbed by manufacturers.



Source: © Agriculture and Horticulture Development Board 2026; 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.

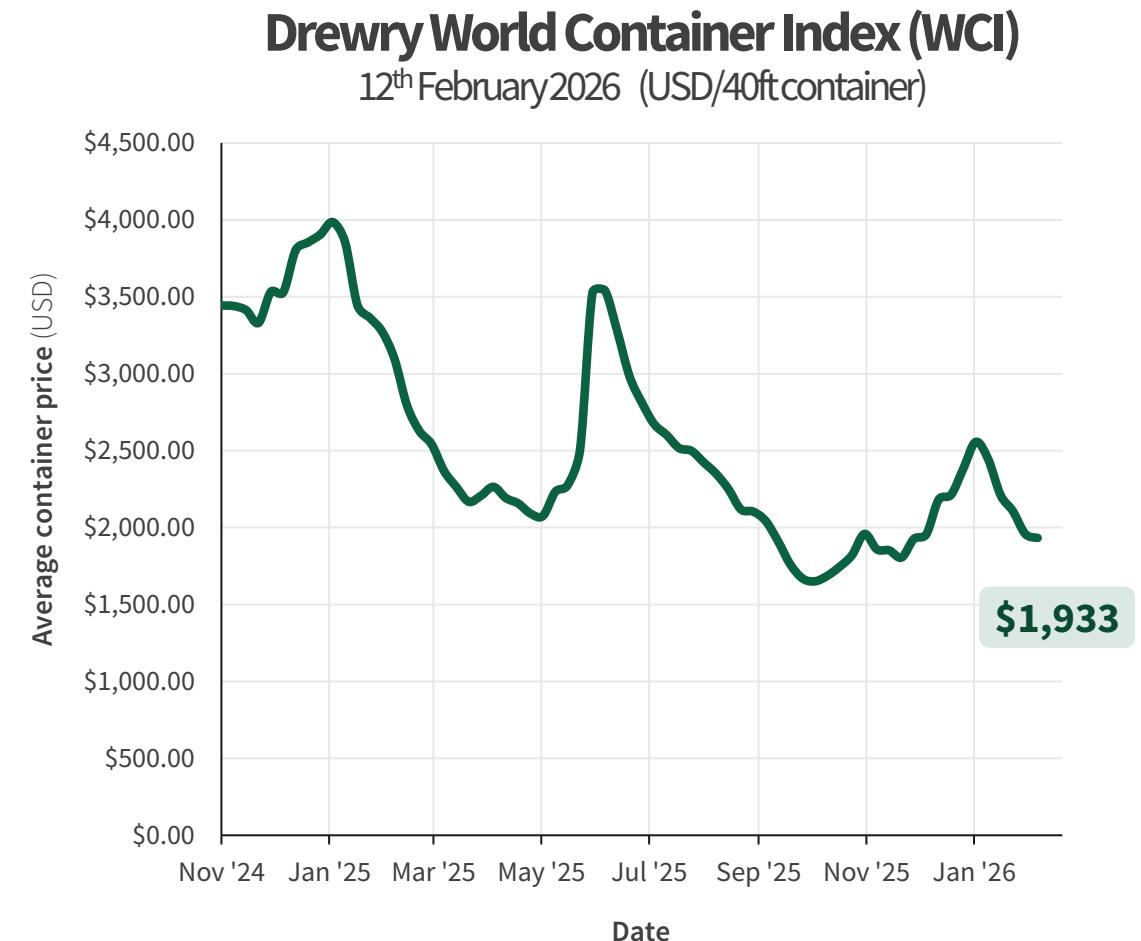
Shipping Container Prices

We track a composite index of major shipping costs across global routes each month. As of February 15, 2026, the Drewry World Container Index stood at \$1,933 per 40ft container, down -45% from February 2025.

Spot rates have fallen for five consecutive weeks, as demand for goods out of Asia continues to wane both to Europe and across the Pacific.

Shanghai-Genoa and Shanghai-Rotterdam spot rates have fallen considerably, with carriers announcing more blank sailings than is typical at this time of year, particularly ahead of the Lunar New Year.

Drewry expects demand, and consequently spot rates, to continue declining in the coming weeks.



Closing Comments

Get in touch

We hope you enjoyed the format and content of February 2026'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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