



The Association of  
**Professional  
Landscapers**

# Business Barometer

End of Q4 2025 Results (Oct-Dec)

March 2026

# Summary

- Overall, 54% of members said that their profit position was behind what they had budgeted for at the end of Q4 2025, and 46% said their sales or order books were behind expectations
- Compared to Q4 2024, members also tended to be slightly behind their previous years' sales (-2% net balance) and profits (-14% net balance) at the end of Q4 2025.
- Over 50% of growers, landscapers, and retailers were behind their expected profit position at the end of Q4 2025. There was more severe variation in landscaper's sales and profit positions compared to retailers, owing to fragile consumer confidence and challenges maintaining overhead costs.
- Of those businesses behind profit, 50% said that they intended to cut or slow investment into their business, while 26% said that they planned to reduce the range of products or services that they offer in order to cut costs.
- Despite the pressures on profits, 70% of members said that they planned to make at least one of a range of pre-defined investments in their business over the next 12 months. The most common planned investment was staff training and skill development (44%).
- Business outlooks of HTA members improved for the mid-to-long-term at the end of Q4 (4.7/4.8 out of 7), following a less disruptive 2025 Autumn Budget than anticipated. However, short-term outlooks were lower at 4.1, marred by fragile consumer confidence and bad weather resulting in challenging growing conditions and weaker consumer spending.
- APL members had more positive outlooks, particularly for the short-to-mid-term (5.0/5.2 out of 7), as 58% of landscapers said they were unable to take on any more work for at least the next 2 months. However, respondents cited difficulties in securing future work, again attributing the fact to weak consumer confidence and restricted spending.

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

# Members' Sales & Net Profit Positions

Actual vs Budgeted; Q4 2025

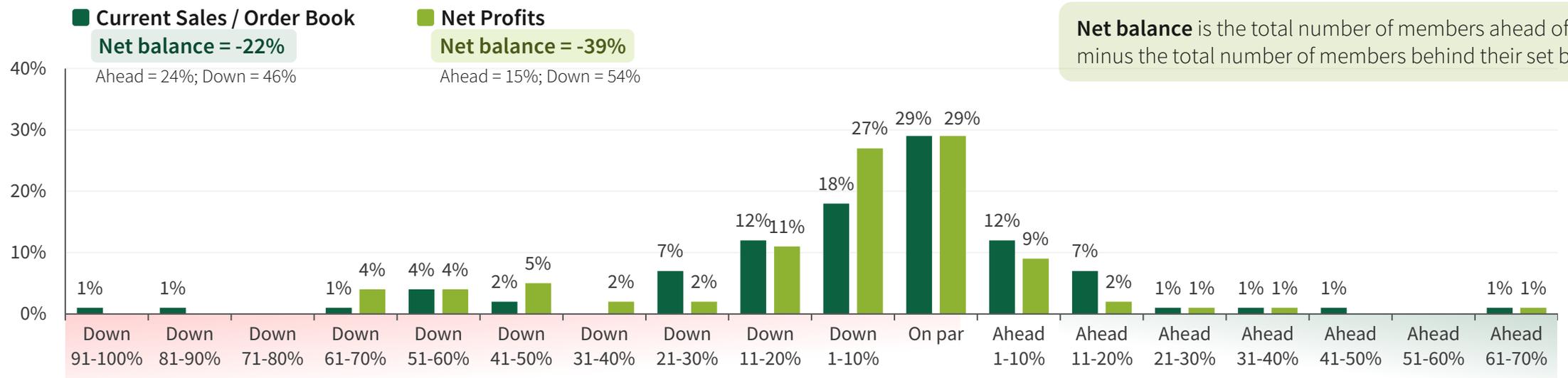
**Members were asked how their sales and profit positions compared to what they budgeted at the end of Q4 2025.**

Most members (54%) said that their net profit was behind budget, and just under half (46%) said that their sales were behind budget.

Consequently, the net balance of members ahead or behind their budgeted sales was -22%, while the net balance of members ahead or behind their budgeted profit was -39%. While sales were typically weaker than budgeted, profits typically being even further behind

was indicative of higher business costs (e.g. NLW and NICs increases) eating into members' profits.

Comparing landscapers with the rest of HTA membership (page 4), there was a much broader distribution of responses. Typically, landscapers' sales positions were more positive than the rest of membership (-13% v -27% on balance), although their net profit positions generally appeared worse off (-44% v -36% on balance).



Source: HTA & APL Business Barometer Q4 2025

Base: 85 HTA & APL members

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

Totals may not add up to 100 due to rounding.

# Sales & Net Profit by Business Type

## Retailers, Growers, Manufacturers & Suppliers

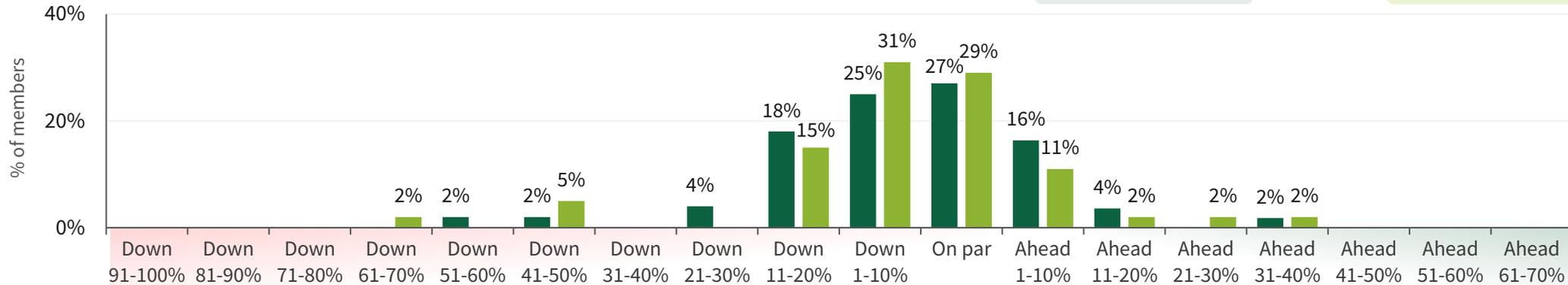
Actual vs Budgeted for Q4 2025

■ Current Sales / Order Book

■ Net Profits

Net balance = -27%

Net balance = -36%



## APL Members (Landscapers)

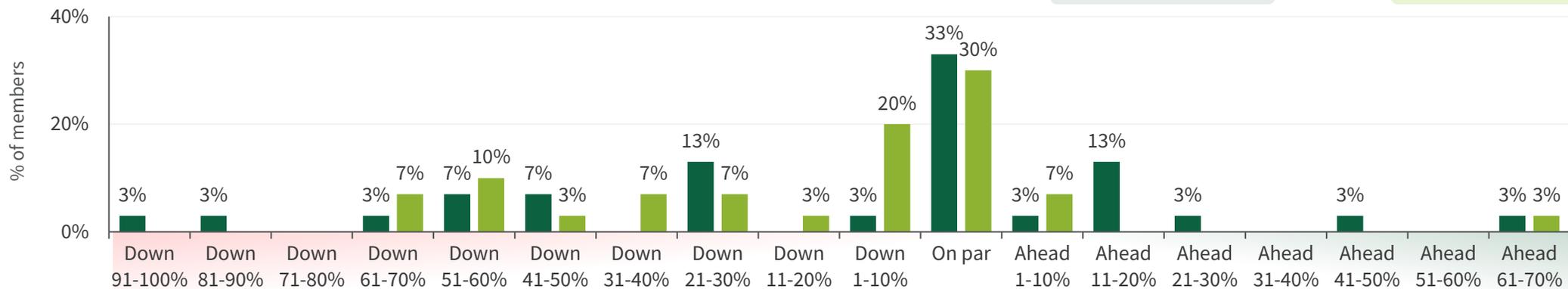
Actual vs Budgeted for Q4 2025

■ Current Sales / Order Book

■ Net Profits

Net balance = -13%

Net balance = -44%



Source: HTA & APL Business Barometer Q4 2025

Base: 55 HTA members, & 30 APL members

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

Totals may not add up to 100 due to rounding.

# Retailer Sales & Net Profit by Catering Status

## Retailers with Catering

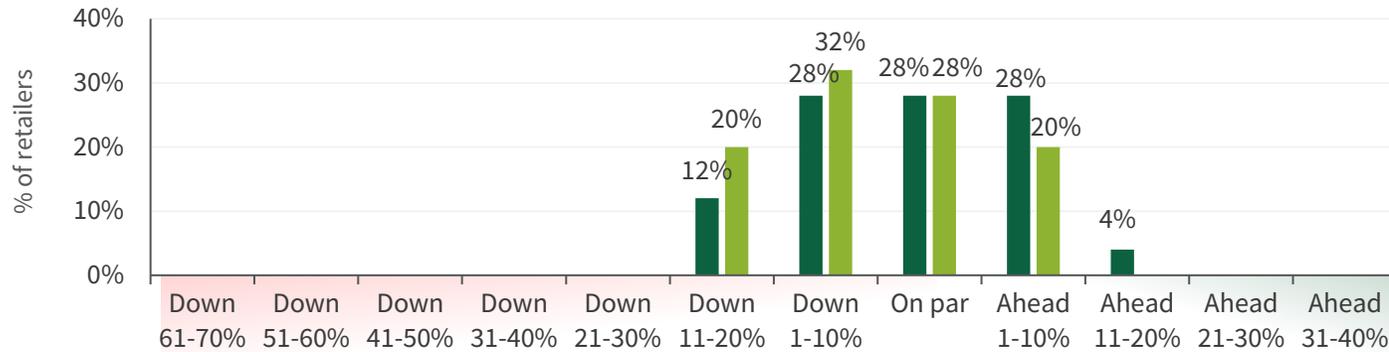
Actual vs Budgeted for Q4 2025

■ Current Sales / Order Book

■ Net Profits

Net balance = -8%

Net balance = -32%



## Retailers without Catering

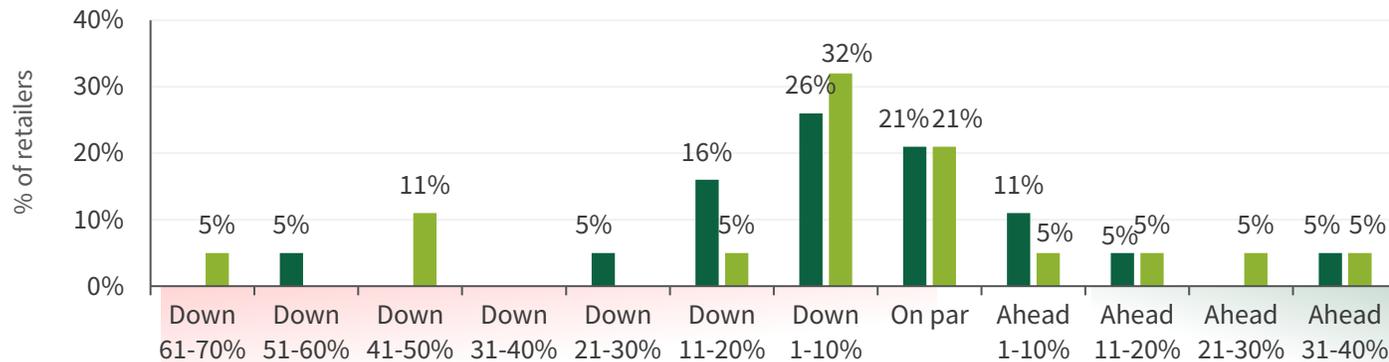
Actual vs Budgeted for Q4 2025

■ Current Sales / Order Book

■ Net Profits

Net balance = -32%

Net balance = -32%



In our January [Market Update](#) report, we reported that garden centre sales in 2025 finished +9% ahead of 2024. Here, we look at how retailers have performed relative to their budgeted sales and profit, comparing those with catering against those without.

Retailers with catering generally had stable performance with respect to set budgets compared to retailers without, who produced a wider distribution of results.

Most retailers with catering met or exceeded their budgeted sales (60%), compared to 42% of retailers without catering.

However, the distribution of retailers above or behind their budgeted net profit was similar irrespective of whether they had catering or not (-32% net balance).

This highlights how higher running costs, resulting from wage increases and increased national insurance contributions, is affecting retailers across the board.

# Sales & Net Profit by Business Type

Members were also asked about their sales and profit performance relative to Q4 2024.

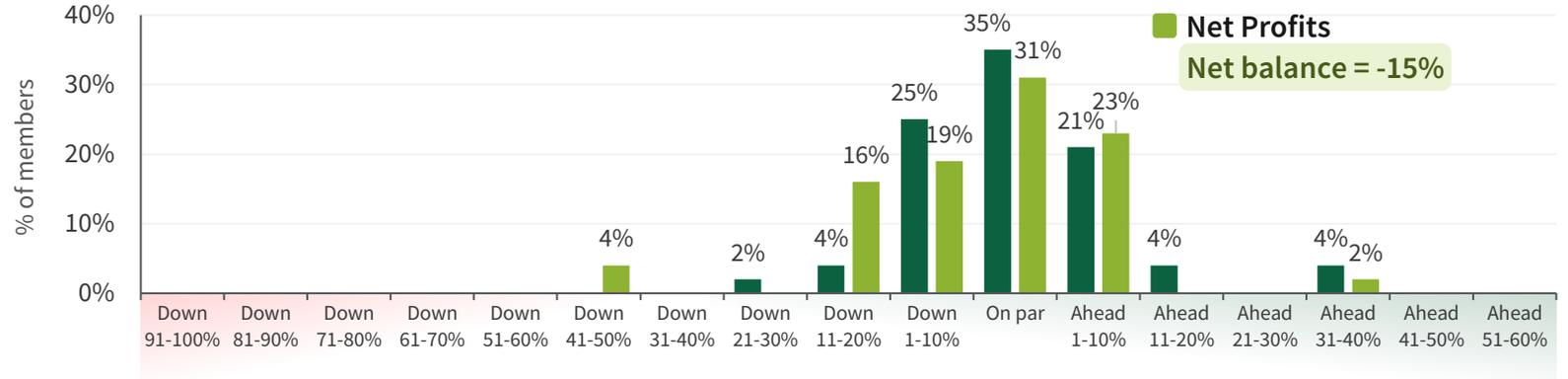
For HTA members, both sales and profits for Q4 tended to be behind Q4 2024. The net balance of members ahead versus behind their 2024 sales was -2%, and -15% for those ahead versus behind their 2024 profit positions.

Our [January Market Update](#) report highlighted slower Christmas trading in December 2025, which resulted in weaker performance throughout the supply chain.

Overall, APL members fared similarly, again with greater variation than the rest of HTA membership. It is clear that many members are facing pressure on their profits, particularly those who are seeing weaker sales due to poor consumer confidence.

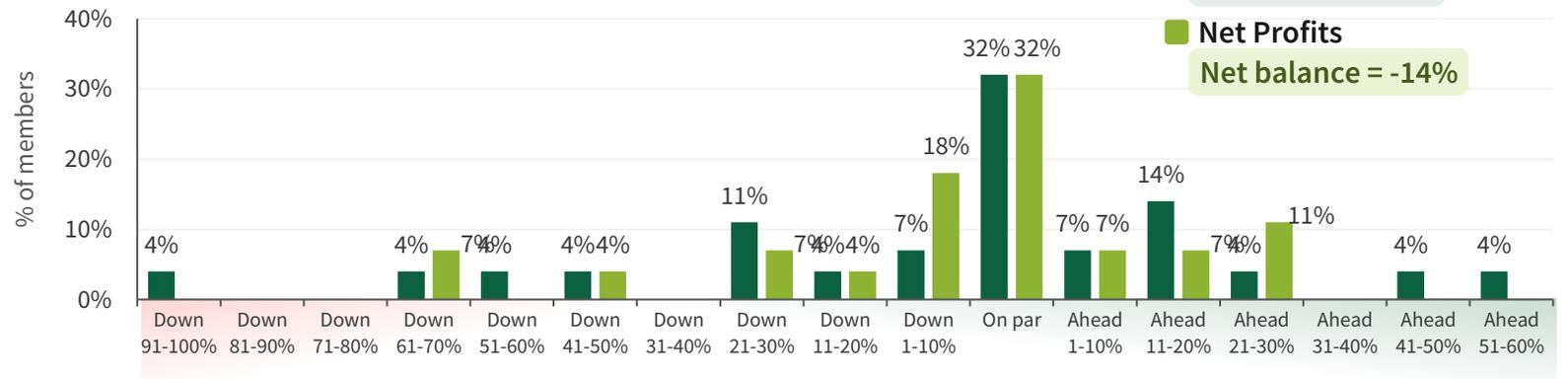
## Retailers, Growers, Manufacturers & Suppliers

Actual Q4 2025 vs Actual Q4 2024



## APL Members (Landscapers)

Actual Q4 2025 vs Actual Q4 2024



Source: HTA & APL Business Barometer Q4 2025

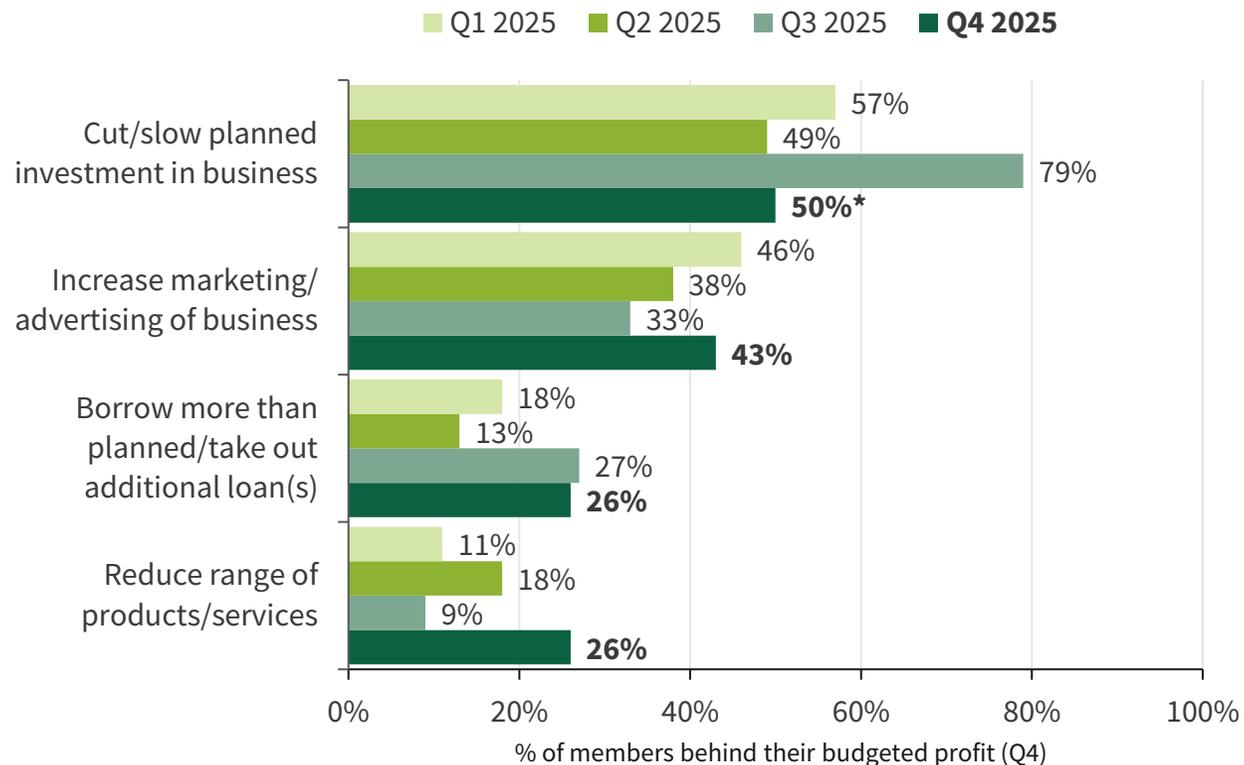
Base: 48 HTA members, & 28 APL members

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

# Impact of Profit Positions behind Budgets

Planned actions to be taken in the next year

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



**54% of respondents said that they were behind their expected profit position. Of these members, 50% said that they planned to cut or slow planned investment into their business.**

At the end of Q3 2025, 79% of behind-profit members said that they planned to cut investment, so the fall to 50% in Q4 was statistically significant. This could be a product of members having already delayed investments, or the result of the 2025 Autumn Budget being less severe than anticipated, resulting in an improvement to member outlooks (page 9).

Similar numbers of members behind their budgeted profit position planned to increase borrowing compared to previous quarters, while the percentage of members looking to increase the marketing and promotion of their business rose from 33% to 43% between the ends of Q3 and Q4.

26% of behind-profit members said they planned to reduce the range of products and services on offer, up from 9% at the end of Q3. Although within the statistical margin of error, this increase is indicative of the challenging decisions members are forced to make due to pressure on profits.

# Business Investments

## Plans for the next 12 months

**70% of members said that they “definitely” planned to invest in at least one of the five listed areas of their business, as of the end of Q4 2025.**

Page 7 looked at the planned actions of members behind their expected profit, whereas this page covers the planned investments of all members.

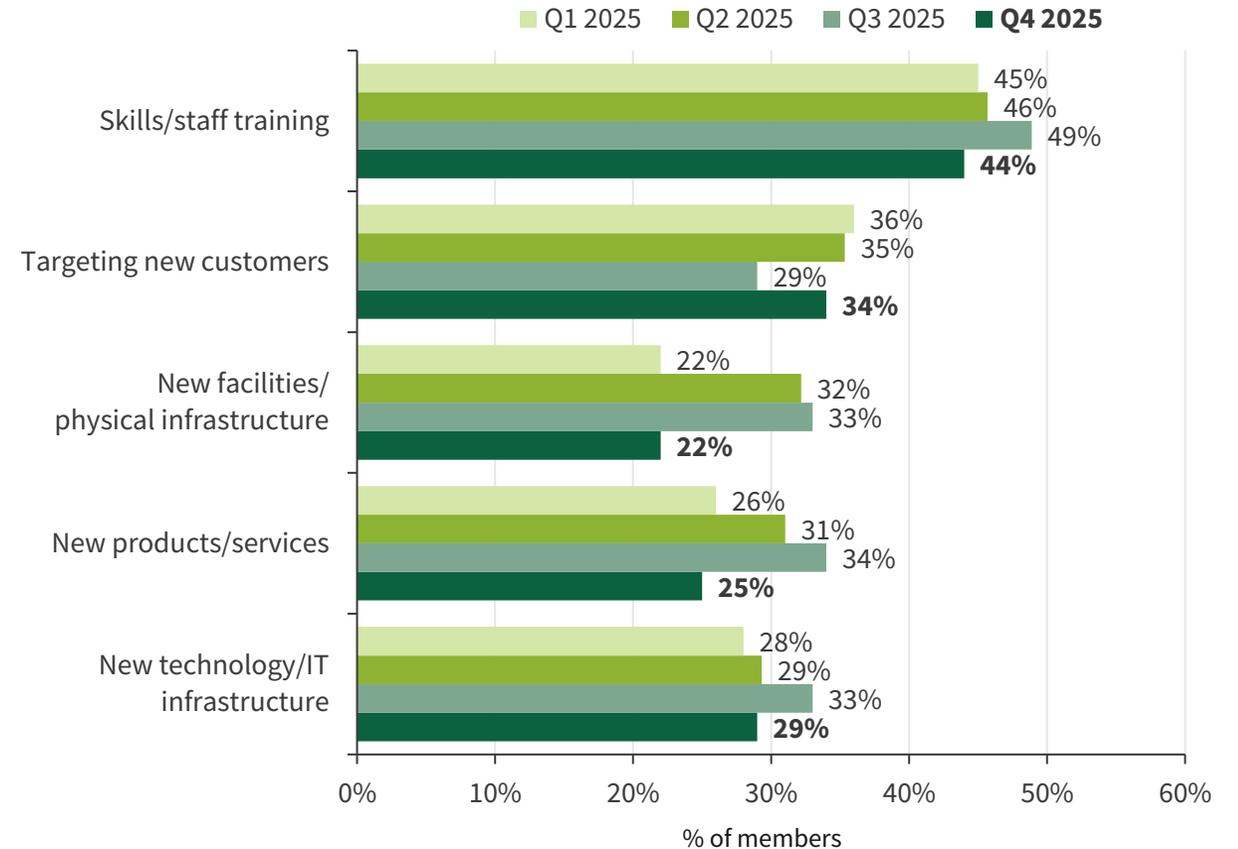
Members’ investment plans for their business were broadly consistent with previous quarters in 2025. Investing in staff training remained the most likely investment members said they would make, with 44% of members saying they were planning to do so.

22% of members said that they planned to invest in new infrastructure – an indicative fall from Q3’s measure of 33%. Several members cited how ongoing infrastructure development was affecting their current sales and profits.

Despite weak consumer confidence and higher business costs, members continue to indicate that they are investing in their business.

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

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



# HTA Business Outlooks

Retailers, Growers, Manufacturers, Suppliers, and Service Providers

**At the end of Q4 2025, the average business outlooks of HTA members' appeared to improve for the medium- and long-term, although the increase was within the margin of error.**

Long-term outlooks rose from 4.3 in Q3 2025 to 4.8 at the end of Q4, while medium-term outlooks rose from 4.4 to 4.7.

This was likely due to the 2025 Autumn Budget including less severe measures than anticipated, particularly as many members expressed concern at the budget in Q3's response.

In contrast, short term outlooks fell to 4.1, down from 4.5 in the previous quarter.

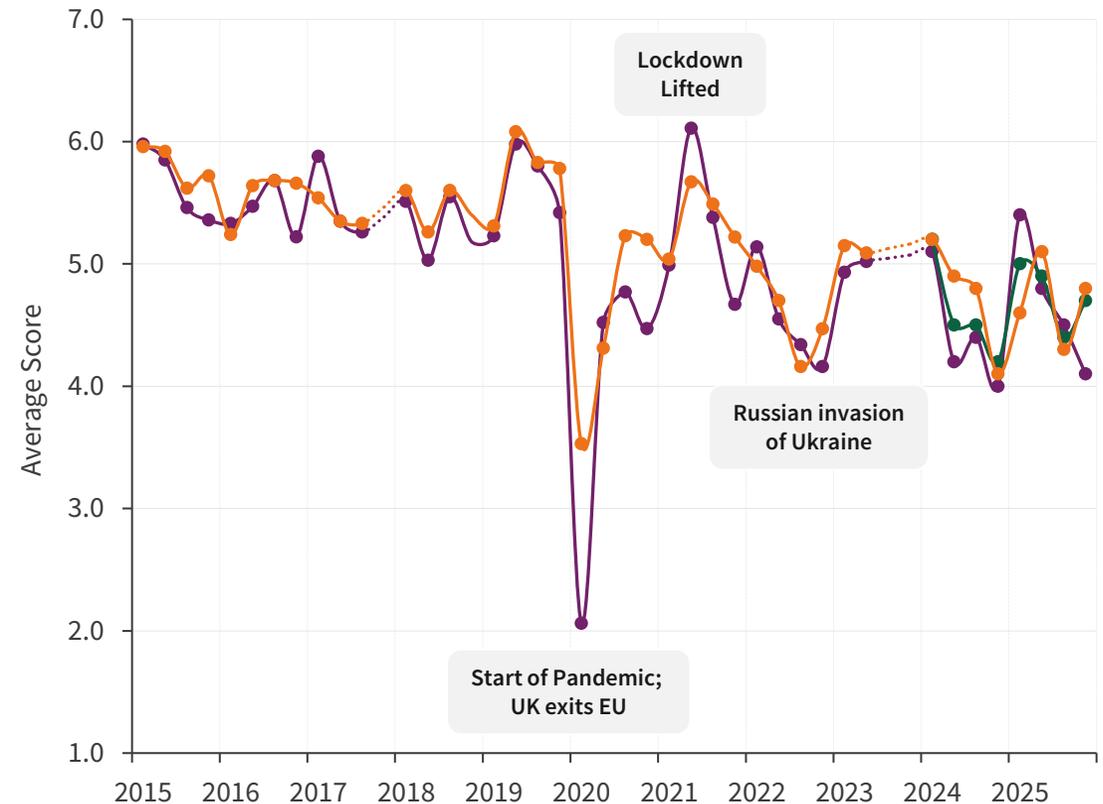
Typically, members' short-term outlooks are lowest at the end of Q4, with poor weather adversely affecting both growing conditions and retail footfall. Many members also cited increase to NICs and minimum wage as putting pressure on their business' profits, while weak consumer confidence also hindered sales.

Page 12 details some of the HTA's recent and upcoming actions to help support members who are finding conditions particularly challenging.

## HTA members' average business outlook

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

- Short-term outlook (3 months) **Q4 2025 = 4.1**
- Medium-term outlook (6 months) **Q4 2025 = 4.7**
- Long-term outlook (12 months) **Q4 2025 = 4.8**



Source: HTA & APL Business Barometer Q4 2025;

Base: 74 HTA members (retailers, growers, manufacturers, suppliers, & service providers)  
Members gave scores for their business outlooks over the short-, medium- and long-term, ranking on a scale of 1 to 7, where 1 = "very negative" and 7 = "very positive".

# APL Business Outlooks

## Landscapers

**Compared to the rest of the HTA, APL members had more positive business outlooks for all three timeframes at the end of Q4 2025. All measures rose or stayed steady relative to Q3 2025.**

APL members' short-term outlooks improved from 4.5 to 5 between the ends of Q3 and Q4 2025. Around 50% of APL members said that they were booked for work for at least the next 3 months (page 11), likely supporting the short-term business confidence score despite the poor winter weather hampering work.

Medium-term outlooks also improved, up to 5.2 out of 7, following a post-pandemic low of 4.4 in Q3 2025. Meanwhile, long-term outlooks stayed flat at 4.8.

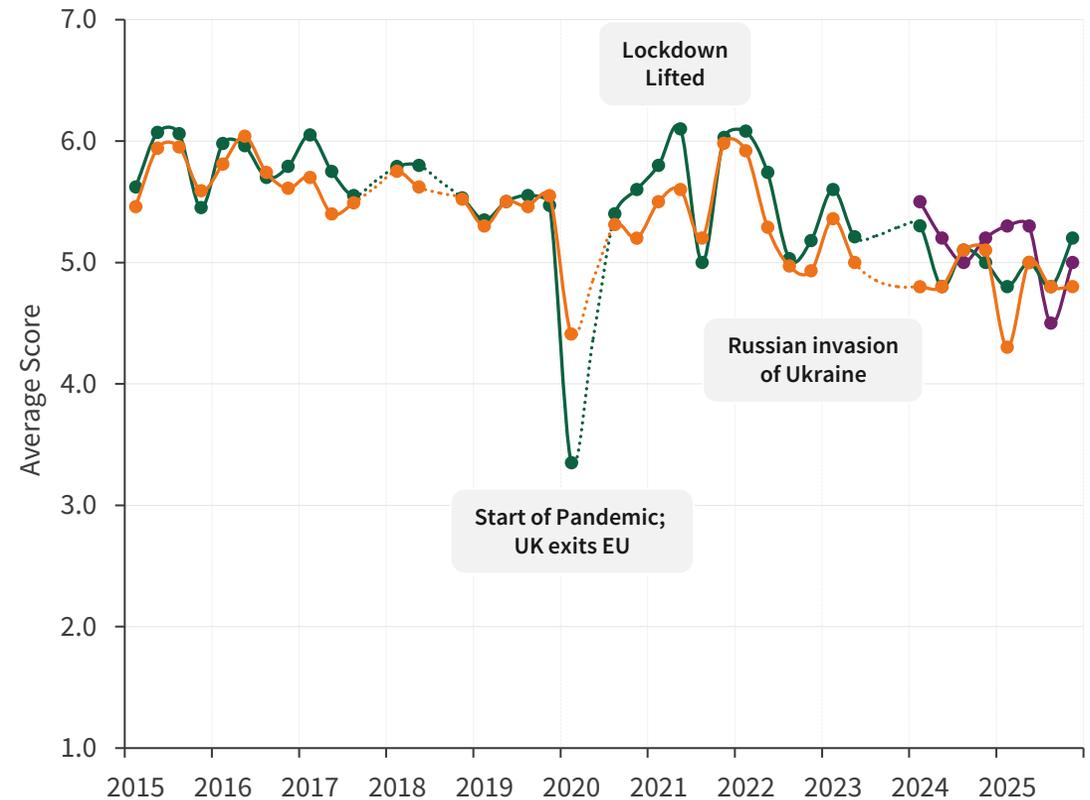
Historically, APL members have given higher business outlook scores than the rest of HTA membership, although landscaper's business outlook scores have generally trended downwards since 2015.

Although outlooks were more positive for APL members than the rest of the HTA at the end of Q4, many members cited difficulties in securing future work due to weak consumer confidence. Some members also indicated that they had cut overheads to improve their positions.

### APL members' average business outlook

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

- Short-term outlook (3 months) **Q4 2025 = 5.0**
- Medium-term outlook (6 months) **Q4 2025 = 5.2**
- Long-term outlook (12 months) **Q4 2025 = 4.8**



Source: HTA & APL Business Barometer Q4 2025;

Base: 43 APL members

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

# Landscapers' Lead-Time for New Jobs

## APL Members

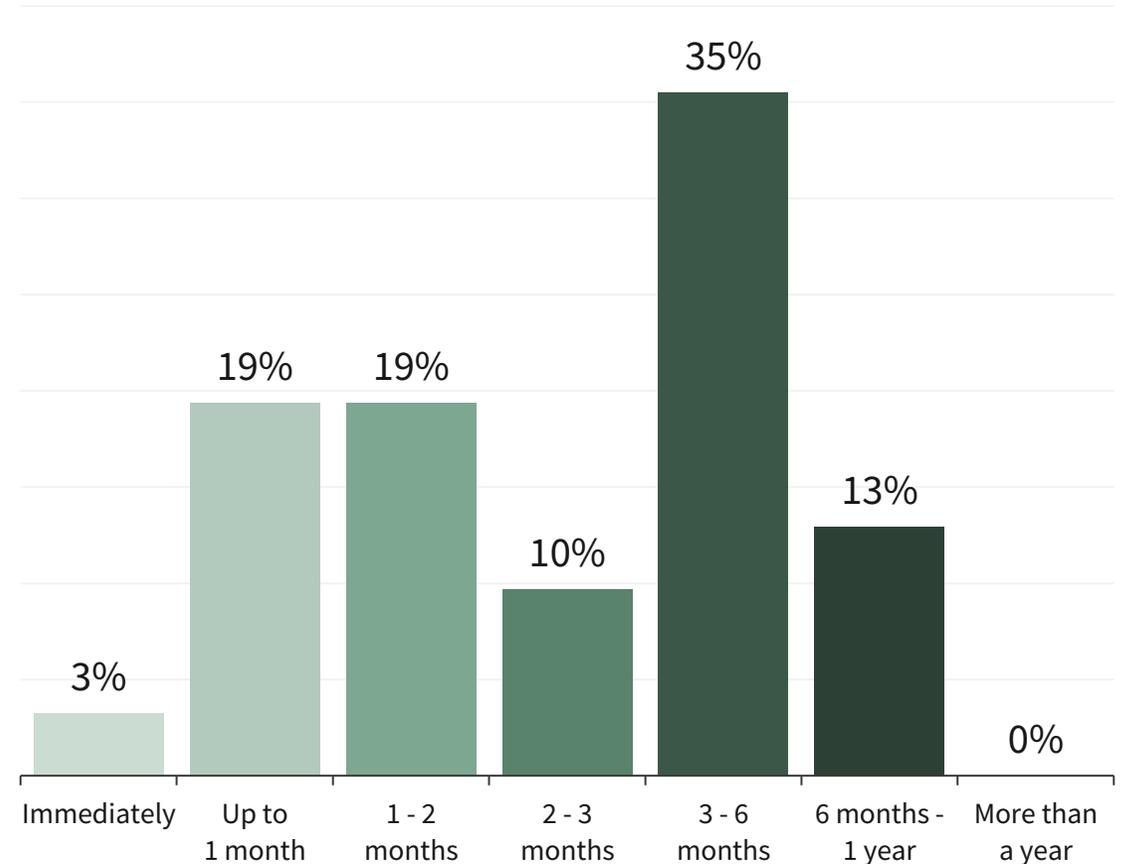
**At the end of Q4 2025, 48% of APL members said that they were booked for work for at least the next 3-6 months, while only one respondent said that they were immediately available to take on new jobs.**

Compared to Q3 2025, the distribution of APL members' lead times at the end of Q4 2025 was broadly similar.

Despite lead times broadly appearing positive, many landscapers noted the impact of weak consumer confidence on their business. Those with shorter lead times described a “complete collapse” in work enquiries and rising costs for both materials and labour as factors affecting their ability to secure new work.

Meanwhile, those with longer lead times also consistently highlighted difficulties in securing work beyond their current bookings.

As the fieldwork occurred in January, the stormy weather was also frequently noted as an issue, causing delays and hampering progress to work on sites.



# HTA Support and Activity

What resources are available to members?

**The current state of the market will pose many challenges for members. Higher business costs from mandatory wage rises and national insurance contributions, persistently low consumer confidence, and cross-border trade friction are just some of the challenges members face on a daily basis. The below information covers just a few examples of the support and activities recently undertaken by the HTA to support members:**

Ahead of the Government's Spring Forecast, HTA have [written to the Chancellor of the Exchequer](#), calling for urgent action to support UK horticulture, providing evidence supported by our Business Barometer reports and our member consultation survey.

HTA has helped to deliver the [common understanding between the UK and EU to implement a SPS \(Sanitary Phytosanitary\) arrangement](#), which will reduce border friction for moving plants and plant products. Until negotiations between the UK and EU conclude however, the current status quo remains in place. The policy team's ongoing [Town Halls and surgeries](#) also continue to provide direct support to members, with the recent webinar on [Extended Producer Responsibility \(EPR\)](#) having been held in January 2026.

At the end of February, HTA released its [Business Benchmarking](#) platform to all members, with studies on grower sales and retail sales currently live. Future benchmarking studies on wages & labour, financials, and grower inputs will be released to members in the current months, but members are encouraged to onboard and benefit from identifying areas of strength and opportunity.

Additionally, the first output of HTA's [Your Garden Year](#) was released in February 2026, as part of a seasonal campaign to align growers, retailers, suppliers, and manufacturers in inspiring gardeners all year round. Marketing assets and the year planner can be accessed via the HTA website.

Your Garden Year will also tie into the existing [Plant Retail Success initiative](#), bringing together new and existing materials to help support retailers improve commercial performance in the plant area.

For APL members, the regular [cluster meetings](#) and member [WhatsApp groups](#) remain vital avenues for landscapers looking to access support and touch base. Meanwhile, HTA's calendar for [2026's Regional Events](#) has been finalised, with the first having been held. Regional Events are free to attend and enable businesses the opportunity to collaborate and share ideas, whilst hearing from industry experts across a wide range of topics.

# Sample Overview

## Who participated?

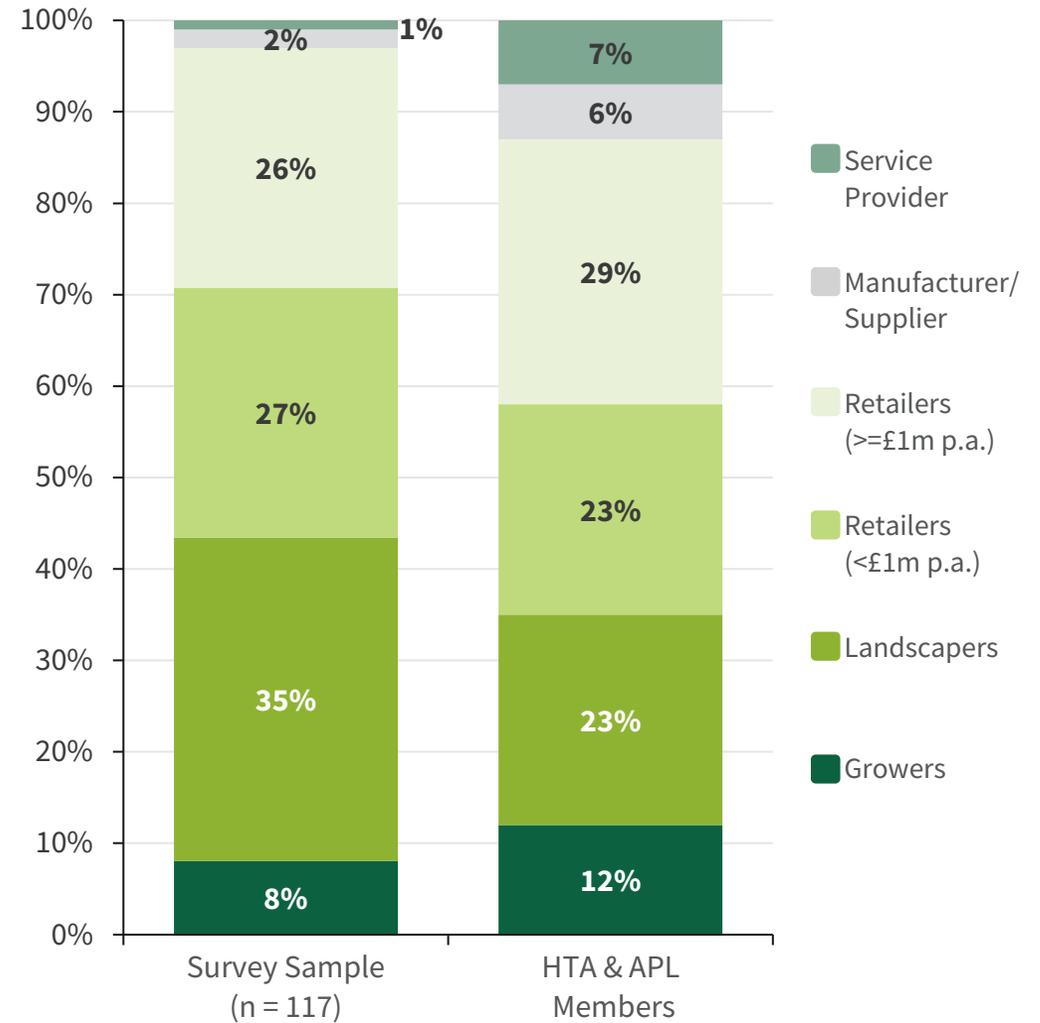
The HTA & APL Business Barometer poll for Q4 2025 received 117 responses from members, equivalent to a response rate of 9%.

Responses were broadly representative of the overall HTA membership, therefore, survey results are robust and should generalise well to the full HTA membership.

Landscapers and smaller retailers (annual turnover under £1m) made up a slightly larger proportion of poll responses with respect to their share of membership. Consequently, other members were typically underweighted in their responses.

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

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



# Closing Comments

We hope you enjoyed our State of Trade update covering Q4 2025.

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



[marketinfo@hta.org.uk](mailto:marketinfo@hta.org.uk)



Horticultural Trades Association,  
Horticulture House,  
Chilton,  
Didcot,  
Oxfordshire,  
OX11 0RN

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