



HTA Sustainability Roadmap **Impact Report 2021**

ONE YEAR ON – PROGRESS ACHIEVED AND NEXT STEPS TO 2025



Foreword

As the COP26 summit has reminded us, our nation and our planet stand on the cusp of historic changes to our environment and way of life. We're faced with climate change, global warming, and a growing biodiversity crisis which all pose existential risks to humanity.

Horticulture is a solution provider to these issues. The green spaces we design and maintain, the plants and products that we produce and retail are a haven for nature. The public and government will increasingly look to us for solutions to the climate crisis, be that in tree planting, designing green spaces to cool our cities, or in helping the public use their gardens to do their bit.

This presents huge opportunities to grow our industry. But we need to do so in a sustainable manner. We need to look to our own carbon footprint, our packaging waste, and our use of increasingly scarce water. We will also need to accelerate moves to more sustainable use of resources such as chemicals and growing media.

This is why, in November 2020, we launched our five year Sustainability Roadmap for the industry. I'm pleased that we can now publish this progress report one year on. A key highlight is the completion of free half-day workshops by around 60 member businesses with a combined turnover of almost £700 m to help them write and get started with their own sustainability plans. Another is the work of the growing media task force, which brings together industry bodies to ensure the government develops policies that align with and support our industry's substantial contribution to the economy and environment.

But there's more that you can expect from us in 2022. We will grow our dialogue with the water industry and government to make sure they understand how critical water is to our industry. We are already working with them on better data for business support, and on evidence for government on the investment case for supporting us achieve greater water resilience. We will also provide member support with the forthcoming waste regulations (Extended Producer Responsibilities) as this becomes clear in 2022.

The coming decade holds once-in-a-lifetime potential for our industry to grow. In doing so we have an unprecedented chance to create a better industry, country and planet for the generations that follow us. I'm proud and excited to be working with our members on further progress in this vital and exciting area.



A handwritten signature in black ink, which reads "James Barnes". The signature is fluid and cursive, with the first letters of the first and last names being capitalized and prominent.

James Barnes
HTA Chairman

Executive summary

In 2021 we set out our ambition to place UK horticulture and landscaping at the leading edge of sustainable business practice. To facilitate this, we published our Sustainability Roadmap with goals in five key areas. Each area was chosen for its uniqueness to horticulture, and the potential environmental and commercial impact that progress in each area would make. Over 2021 we have laid some solid foundations and begun to make progress to achieving these goals, the specifics of which are detailed in this progress report. Some highlights from the first year of the roadmap are:

Sustainable growing media

- We convened and chaired a cross-industry growing media task force which committed to a voluntary removal of peat from horticulture between 2025 and 2028 in retail and 2028 and 2030 for professional growers
- We have made the case to government that the speed at which peat can be removed from horticulture depends on the availability of viable alternatives, the principle of exemptions, and realistic time scales
- The Responsible Sourcing Scheme for Growing Media and consumer education on peat use in horticulture will roll out in 2022

CO2 reduction

- HTA member businesses with a combined turnover of £185m and over 6,000 tonnes of CO2 emissions enrolled on a certification scheme that we brokered for members with Planet Mark that includes carbon foot printing and reduction targets
- Businesses with a combined turnover of £690m were represented at free workshops for HTA members run by Planet Mark on how to get started with sustainability and CO2 reduction, helping them start or further develop their own sustainability plans

Water resilience

- We have begun outreach to the water industry to raise their awareness of how we achieve ‘win-wins’ through

securing a more sustainable supply of water for the industry. This includes discussions on drought planning, providing better water use data to help our members, and support for members in investments in measures to increase water-resilience

- We have published ‘how to’ guides which draw on and share members’ experience in implementing water efficiency measures which have received much positive feedback from members using them for ideas

Plastics in horticulture

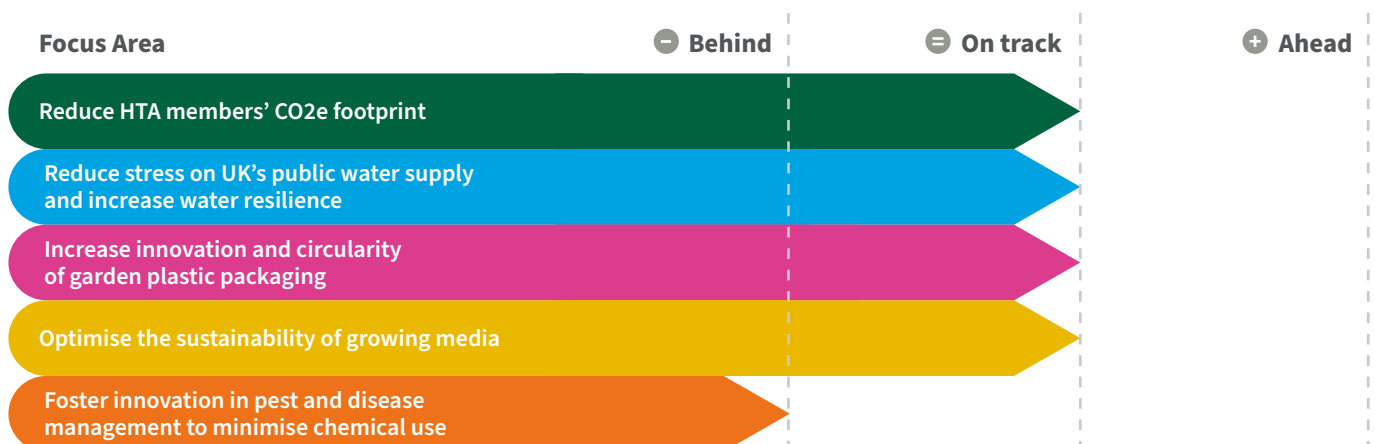
- We have responded to government consultations on packaging and waste regulations, making the case for industry-led schemes that reduce packaging waste to be incentivised in forthcoming Extended Producer Responsibility regulations on packaging

Our focus in 2022

We know there is more to do. In the area of chemicals for pest and disease management limited progress has been made, and over 2021 many of our members have highlighted the opportunity for us to do more to connect our members with each other to help each other. With this in mind, we will develop a network of reference sites over 2022 – member businesses which will work with us to share knowledge of how to achieve greater sustainability across the industry and showcase to the outside world some of the strides our industry is making. We will also set up a governance body for the Roadmap including members and environmental organisations to advise on its development.

Our work to engage government with the Roadmap will continue, in particular on peat and ensuring that our industry has similar support in becoming more sustainable as is being afforded to other industries. We will build on the work we have done on measurement of CO2 to develop better carbon measurement tools for our members, with the supporting resources to help members in this area. Horticulture has a huge opportunity to provide solutions to the climate and biodiversity crises and we look forward to growing our support for members in the coming years.

Progress - at a glance



Background to the Roadmap

The HTA's Sustainability Roadmap focuses on 5 main areas unique to ornamental horticulture and landscaping. The goals we set out in the Roadmap Charter in 2020 are collective goals, they do not prescribe what "good looks like" for any one individual business. The aim of our goals and our roadmap is for our members to join us to do whatever they can to contribute to the overall industry goals. By doing so, we aim to place UK horticulture and landscaping at the leading edge of sustainable business practice.

Sustainability can only be achieved by balancing impacts on People, Planet and Profit. Businesses must ensure they meet their customers' expectations, which are increasingly around issues of sustainability, and how environmentally friendly the products they buy are. In addition, by increasing their own sustainability, businesses can boost their employee engagement, pride in their workplace and job satisfaction. By leading the way in sustainable practice, businesses can open themselves up to opportunities for long-term investment and raising capital, allowing for further improvements to



sustainability and ultimately improve the financial bottom line. In contrast, a business that does not look to build sustainability into its practices faces the risk of increased costs through taxes and legislation, and greater difficulty in finding investors in the future. Only when all three aspects of sustainability are met and mutually supportive can lasting benefits for the environment be achieved.

This report will evaluate the progress we have made so far on the goals within the Sustainability Roadmap, as well as provide commentary on what the HTA has done to help our members improve their sustainability.

The five focus areas of our Sustainability Roadmap



Reducing HTA members' carbon footprint



Reducing stress on the UK's water supply



Increasing circularity in horticultural plastics



Increasing sustainability of growing media



Fostering innovation in pest and disease management



St Peter's Garden Centre



A year of foundation building and early progress

A year ago we set our ambition to establish UK horticulture and landscaping at the leading edge of sustainable business practice. In this, the first, of our annual progress reports we're pleased to be able to report good progress towards the goals we set out in our five year Sustainability Roadmap.

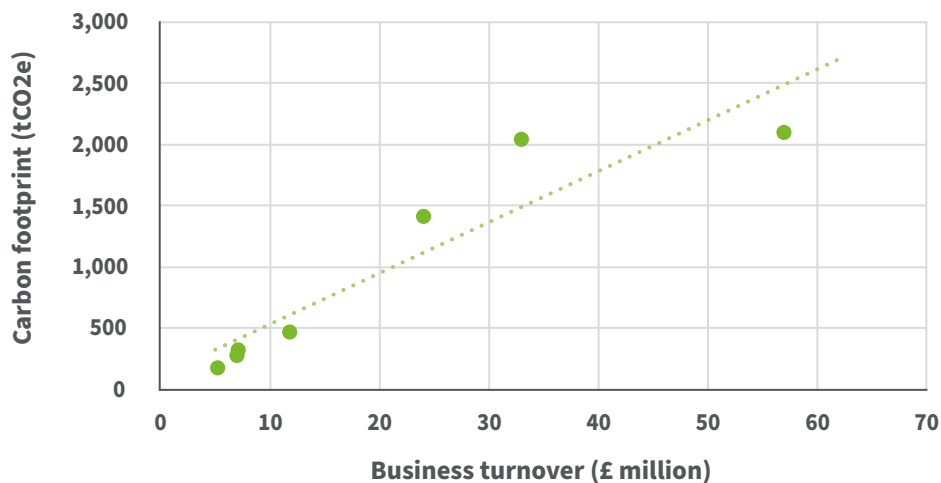
Carbon reduction

We pledged to support our members in making a 20% reduction (averaged across all members) in CO2 emissions. To this end we have supported HTA garden retailers with a combined turnover of £145m which together account for 6,000 tonnes of CO2 emissions access an accreditation scheme with our partner Planet Mark. These centres are now working towards reducing their CO2 emissions substantially as part of organisation-wide plans to increase sustainability. Businesses which together account for a combined turnover of £690m attended free workshops around how to get started with a sustainability plan that includes reductions in CO2 emissions.

We complemented this by publishing a free 'How to' guide for retailers including tips and case studies with ideas for reducing CO2. Whilst this work gives us a solid start, more work remains to be done in supporting other types of HTA member businesses with their carbon reduction. We have begun researching how we could widen access for members to carbon foot printing tools, and will produce 'How to' guides focused on more types of member in 2022. In particular we'll be working to make sure that this support is tailored for our smaller as well as our larger members.



Garden centres' carbon footprint



HTA retailer members have measured their carbon footprint through the Planet Mark certification scheme. We have been able to correlate the CO2 produced per £million of garden centre turnover, and will use this data to measure progress against the Roadmap's goal of a 20% net reduction in members' aggregate scope 1 and scope 2 CO2 emissions by 2025. In the coming years this approach will be extended to more businesses and types of member business.

Progress on water resilience

Reliable and sustainable access to water is critical to our industry. We have used 2021 to build relationships with government and the water companies to build their understanding of our industry so they can take account of its needs as their policies develop. Through responding to consultations with water companies we have secured clarification from Affinity Water that - in law - watering of plants grown for sale in garden centres and commercial crops would not be restricted under non-essential use bans on water use during times of drought. Whilst that's an important clarification, it's just as important that we work with the water industry to minimise our use of water and become as water efficient as possible. To this end we have published guides for members in retail and plant production on ways to become more water efficient.

More sustainable use of plastics

Progress towards our goals of re-use, recycling and reduction in plastics has been slower than we would have liked. We have begun discussions with the Garden Industry Manufacturers' Association (GIMA) about collaboration on ways to achieve this, and have collected data on the tonnages of plastics used in different areas of horticulture. However, in 2021 it became clear that major changes to packaging waste regulations with huge potential to affect members are on the horizon. We responded to the consultation on proposed Extended Producer Responsibility regulations on packaging waste, and have begun work with our Preferred Partner Ecoveritas to ensure specialist support and advice for members on this area is in place. It is likely that we will widen the Roadmap's goals to incorporate packaging waste in general in light of these changing circumstances. Similarly given the results of the ballot on the AHDB's future, our work on chemicals has focused predominantly on making sure that the industry has continuity around Extensions of Authorisations for Minor Uses of chemicals (EAMUs).

Peat and growing media

The greatest progress against the Roadmap's goals has been made in the area of peat and growing media. Through an industry-wide Growing Media task force we have presented a united position on the voluntary removal of peat from horticulture that secured the backing of the GMA, HTA, the NFU, the GCA and the RHS. This work is strengthening the case for government support in the areas of manageable time frames, securing help in accessing more sustainable and effective peat alternatives, and building the case for exemptions where no viable alternatives to peat yet exist. We have made clear to the government that a peat ban in 2024 would be extremely damaging for the industry, and that voluntary time frames of between 2025 and 2028 in amateur and 2028 and 2030 in professional provide more manageable time frames. Our growing media manufacturer members have taken huge strides to ensure that the Responsible Sourcing Scheme for Growing Media scores and logos will appear on products for the amateur market in 2022, enabling consumers to make more informed purchasing decisions based on what's in their growing media.



£9.6 billion

potential growth in the annualised asset value to the environment and health of the UK's gardens and green spaces



£690 million

combined turnover of HTA member businesses attending a HTA-Planet Mark workshop on developing a sustainability plan



PlanetMark



6000 tonnes

of CO2 emissions among HTA members now being reduced through a HTA brokered accreditation scheme with Planet Mark

HTA's own sustainability

This year, as well as encouraging our members to measure their carbon footprint, we also undertook the task of measuring our footprint. We now have our certification and found our comparable location-based footprint was 75.7 tCO2e. However, due to our use of 100% renewable energy at our office in Chilton, our market-based footprint is much lower, at just 30.0 tCO2e. We are committed to measuring, and crucially, to reducing our carbon footprint.

In addition to our carbon footprint, we are looking at our wider sustainability impacts. Our National Garden Gift Cards are all made of compressed cardboard sourced from sustainable forestry and are 100% recyclable and compostable, and we are evaluating the extra packaging that we use. Next year we will also be setting up our own "Green Team" within the HTA to address the areas of impact we discovered in our carbon footprint and make some real change and progress.

Our plans for 2022

We're very excited about the year to come. In 2022 you can expect to see us focus on the following themes and areas.

Driving CO2 reduction

In our first year we have made good progress in measuring and understanding the carbon footprint of garden retail, and the key drivers of this, but there's much more to do. We will extend this work in 2022 to other sectors of membership. This will be part of a strategy to develop better CO2e and lifecycle assessment measurement tools for the industry, tools which can help inform and drive real change across the supply chain.

Bringing people together

We will do more to connect members with each other to share experience and help each other with sustainability. This will include developing a network of reference sites among our member businesses and fostering communities of member businesses through which knowledge can be shared. This will include one-off round-table discussion groups or webinars for members, as well as developing online discussions and focus groups between members. We will also invite more members and organisations with expertise in sustainability to be involved in advising us on the development of the Roadmap as part of a governance group.

Growing media and peat

Our work on peat and growing media will continue. We have already begun work with the industry and government to critically but constructively review the potential for different alternatives to peat and agree actions to accelerate their availability. This will lead to greater clarity on what action can be undertaken by government and the industry together to accelerate a transition away from peat in horticulture. In spring 2022 we'll be launching a consumer education campaign on responsible and sustainable use of growing media including e-learning for garden retailers developed with the GCA.

Practical support for our members

We will continue to develop our work supporting members with the practicalities of how to deliver change on the ground. We will publish more 'how to' guides to help members, and ensure that advice lines and Preferred Partners are in place to help members with areas such as utilities, compliance with waste regulations or other ways of becoming more sustainable. We're conscious that many businesses in horticulture have a great story to tell with regard to their sustainability. We will support members in doing this by sharing evidence for the benefits of gardening and green spaces, and providing guidance to ensure that environmental claims made in marketing comply with new regulations coming into force around making green claims.

Governance of the Roadmap

In 2022 we will invite members and environmental organisations to play more of a role in advising us on how to develop our support for members on sustainability as part of a governance group. It's extremely important that the Roadmap develops to mutually benefit the planet and our members next year and beyond.

Horticulture - a catalyst for green growth

Over 2021 we have worked with other bodies in horticulture and landscaping to commission independent analysis of how much our industry could grow its contribution to the economy by 2030. This includes its potential to deliver environmental benefits, for instance through carbon sequestration and fostering better health and biodiversity through our green spaces. We will use this evidence with politicians and civil servants to promote our industry as a key part of the government's 'Build Back Greener' goals for the country. This will be a key part of our work in arguing for fiscal incentives to help our members invest in measures and technologies to make their businesses more sustainable and productive.

Get involved

We hope you're feeling inspired to play a part with us in placing our industry at the leading edge of sustainable business practice. To find out more about our work and the resources that are available to you as a HTA member visit hta.org.uk/sustainability or email us at sustainability@hta.org.uk



Driving the roadmap forward - HTA members in action



Frank P Matthews

Frank P Matthews produce over a ¼ million container grown trees a year without relying on mains water, despite increasing restrictions on river water extraction which is now not possible during July and August when water use is at its peak. They have 3 reservoirs, collecting 80% of rainwater and run off across the nursery site. Two key contributing factors are 1) that 95% of trees are on a drip irrigation system, and 2) they are watered little and often, up to 12 times a day depending on the trees' optimum requirements, this reduces excess use to a minimum.

Aylett Nurseries

In 2018, Aylett Nurseries installed LED lights using the company Ideal Lights. They found that by installing LED lights, they saved around a quarter of their annual electricity usage, and (based on the price of energy in 2020) saved over £18,000 in energy bills a year.

After switching to LED lights, Aylett Nurseries also saved 60 metric tonnes of carbon emissions between 2017 and 2019. (Based on conversion factor of 0.53702 kWh to KG CO₂)



Brimsmore Gardens








Brimsmore Gardens installed solar panels on the roof of their garden centre building in 2016, and they have also recently installed a biomass generator, which has reduced the import of energy from the grid with significant savings.

The change from a clumsy oil-fired hot air heater to the precision of the biomass with heat outlet points that are controllable in each section of the centre has made the overall environment much more comfortable whilst saving money too.





Are we where we expected to be?

When we published our Sustainability Roadmap charter at the end of 2021 we set out what you could expect to see from us as a HTA member. This table provides details of what we've delivered in each of the areas we set out, and whether this is ahead, in line with, or behind where we had expected to be in 2021.





Focus - Reduce HTA members' CO2e footprint		
We said you could expect:	Progress	What we delivered
Access to a CO2 and sustainability accreditation scheme		We partnered with Planet Mark to provide a discounted sustainability certification scheme HTA members. Member businesses with a combined turnover of £185 million are in the scheme.
Access to online CO2 benchmarking		As well as the carbon foot printing in the Planet Mark certification scheme we have begun research into online tools a wider set of members can use to help with their foot printing and benchmarking in 2022.
Reference sites, content, workshops, and case studies to help you reduce CO2		We produced a how-to guide for garden retailers to start reducing their carbon footprint, we ran 3 free workshops to HTA members to begin looking at sustainability within business. Businesses with a combined annual turnover of almost £700 million were represented at these workshops.
Focus - Reduce stress on UK's public water supply and increase water resilience		
HTA to argue for government to support investments in water efficiency and wider sustainability		We responded to drought plan consultations from water companies in the south east flagging the critical importance of water to horticulture. We presented on the industry's responsible use of water to the water industry at the Waterwise conference and have built dialogue with the water companies following this. We have highlighted to government and parliamentarians the scale of jobs and tax revenues that depend in part on access to water and support for investment in greater water resilience in horticulture.
Case studies and examples of how to build water resilience		We developed two 'how-to' guides for members with tips on water efficiency. These share examples from members in retail and ornamental production.
Online benchmarking tools to help business planning		We have begun discussions with the water industry on collating data on mains water use based on metered data. This will help us provide benchmarking tools and online calculators for members. It will help us show government the level of employment and economic contribution that relies on sustainable access to water for our members, helping to strengthen our argument for support for members to develop water infrastructure such as reservoirs and rainwater capture systems.
Focus - Increase innovation and circularity of garden plastics and packaging		
HTA to convene a contact group from across the supply chain to measure recycling and reduction of plastics and foster industry-wide initiatives		We have responded to government consultations on reforms to packaging waste regulations (Extended Producer Responsibilities), highlighting the need to recognise and reward industry-led initiatives for reducing waste. We provided a webinar for members with briefing information on potential changes to these regulations, and are preparing to provide advice and support for members on these changes in the coming years. This has been done in consultation with the Garden Industry Manufacturers Association.

 Behind  On track  Ahead

Focus - Increase innovation and circularity of garden plastics and packaging *continued*

We said you could expect:	Progress	What we delivered
Support, measurement, and promotion of industry-led schemes to recycle garden plastic packaging		We have worked with our Preferred Partner Ecogen to recycle around 2,000 tonnes of packaging waste, whilst providing participating members with an income stream for this waste. However we have not delivered as much as we would have hoped for in terms of promoting industry-led schemes.'
Continued collaboration with others to encourage kerbside recycling of horticultural plastics		We submitted a response to a Defra Consultation on Consistency in Household and Business Recycling in England. We called for non-black, recyclable plastic plant pots to be accepted in kerbside recycling, and for further review of the acceptance of growing media bags, and garden chemical containers to be accepted in kerbside recycling.

Focus - Optimise the sustainability of growing media

To actively shape a peat reduction strategy by Feb 2021, engaging with all stakeholders and members		We convened and chaired a cross-industry task force on a voluntary removal of peat from horticulture including the NFU, RHS, GCA, GMA and GIMA. The group agreed a united position on voluntarily removing peat from horticulture between 2025 and 2028 in amateur and 2028 and 2030 in professional. This is caveated on the availability of enough viable peat alternatives, the principle of exemptions, and the level of support from government for the industry in making the transition.
Launch of the responsible sourcing scheme for growing media consumer labelling on POS by 2021 and on packaging by 2022		We have worked with businesses, environmental organisations, and government to ensure that the scheme labelling will appear on packs and online in early 2022. This will provide greater transparency to consumers on the work the industry is doing to improve the social and environmental impacts of growing media and moving the debate on from a sole focus on peat.
The introduction of carbon foot printing for UK growing media by 2023		We have begun to review how to integrate carbon foot printing into the scheme and will develop this work in 2022.
Continued measurement of peat and other material use in professional and amateur growing media		We've delivered comprehensive evidence on the volumes of materials used in growing media. We have used this to show the scale of the task in of removing peat and to make the case for manageable time frames and government help with accelerating access to alternatives.

Focus - Foster innovation in pest and disease management to minimise chemical use

HTA to collaborate with R&D providers to share knowledge of best practice across the industry		We have worked with growers to ensure continuity for Extensions for Authorisation for Minor Use (EAMUs) of chemicals. We have also worked with the Ornamental Horticulture Roundtable Group to highlight the importance of pest and disease management to the UK economy. We did not make as much progress as we had aimed to in knowledge transfer between R&D providers and the industry, however this will be a focus of improvement in 2022.
Development and promotion of standards such as the Ornamental Horticulture Assurance Standard (OHAS) to drive best practice		In 2021 we have continued to promote the OHAS standard to UK growers and pack houses. The standard includes guidelines on water efficiency, chemical use & storage, and other key areas of sustainability in ornamental production. At present there are over 60 businesses which belong to OHAS, which is a key enabler for sustainability in their businesses.



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

T: 0333 003 3550
E: services@hta.org.uk
W: www.hta.org.uk

©Horticultural Trades Association 2021

