

# Garden Market Purchasing 2009-2010

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Growing the success of Irish food & horticulture

***Bord Bia***  
Irish Food Board



## SECTION 1:

Growing the success of Irish food & horticulture

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# SECTION 1: Introduction

Growing the success of Irish food & horticulture

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# Definition of Underlying Growth

- ✓ All trend figures for value show the absolute growth from 2001/02 to 2009/10.
- ✓ Underlying growth is calculated by stripping out price inflation over the past eight years. The following calculation has been used:
  - 2001 to ...

2002	+4.6%
2003	+3.5%
2004	+2.2%
2005	+2.5%
2006	+4%
2007	+4.9%
2008	+4.1%
2009	-4.5%
- ✓ Definition of per capita spend
  - Spend divided by population
- ✓ Definition of per capita occasions
  - Occasions divided by population

# Background & Objectives

- ✓ In 2001, Bord Bia set out to establish market size in the amenity sector in Ireland.
- ✓ In terms of Bord Bia, the amenity sector covers such items as trees, shrubs, plants, cut flowers, foliage, indoor potted plants and bulbs.
- ✓ The specific objective of the research was to provide Bord Bia with a measure of spend, establish where people sourced plant products and understand their motivation for purchase of garden items at a household and individual level, thus providing Bord Bia with:
  - a market size for garden/plant related household purchases;
  - a market size for gift purchases;
  - a market size by source (by named retail channel)

# Research Methodology

- ✓ Ipsos MRBI's recommendation was to conduct a continuous consumer survey among the adult population in Ireland.
- ✓ Interviewing would be spread throughout the year ensuring that all peak purchasing periods would be included in the research.
- ✓ To maximise the accuracy of the information obtained, purchases only relating to the past week were recorded during the 'recall' interview.
- ✓ Interviews were conducted via Ipsos MRBI's FoneBus. FoneBus is a two-weekly telephone omnibus survey, interviewing a sample of 1,000 adults (aged 15+) per wave. FoneBus is a nationally representative survey and each wave of fieldwork is spread evenly over the two-week period ensuring a truly continuous research mechanism throughout the year.
- ✓ At the outset of the survey, 16 survey periods were identified, selected to represent a mix of 'typical' weeks, and to cover all the critical peak purchasing weeks from the amenity market perspective.
- ✓ Sample size was therefore **16,000 adults** – which is a robust sample size



# Research Methodology

✓ In 2002, the following changes to the survey were made:

- Population estimates were amended with the release of new census data from the CSO (as they were made available)

	2002	2001
Household population	1.290m	1.259m
Individual population (15+)	3.017m	2.963m

- In the initial study back in 2001, ‘Flowering plants’ was replaced (after 2 waves) to become 2 separate categories i.e. ‘bedding plants’, and ‘herbaceous plants’
- A new category was also added after year 1. called ‘gardening tools/equipment’.



# Research Methodology

✓ In 2005, further changes were made:

- Population estimates had been revised by the CSO:

	2001	2002	2005	Increase vs. 2001
Household population	1.259m	1.290m	1.397m	(+11%)
Individual population (15+)	2.963m	3.017m	3.218m	(+9%)

- Two new categories were added in this period:
  - Garden structures (incl sheds, glass houses, lean-tos, pergolas, tunnels, cloches)
  - Trellising/fences

# Research Methodology

✓ The survey changes made in 2007 were as follows:

- Population estimates had again been revised:

	2001	2002	2005	2007	Increase vs. 2001
Household population	1.259m	1.290m	1.397m	1.525m	(+12%)
Individual population (15+)	2.963m	3.017m	3.218m	3.398m	(+15%)

- Five new categories were added:
  - Other hard landscaping products (sleepers, bricks, etc)
- “Landscaping Services” were replaced by the following four categories:
  - Garden Designer (a person who designs/plans your new garden)
  - Garden Maintenance (cutting hedges/grass, weeding, de-heading flowers, etc)
  - Garden Makeover (complete overhaul of garden)
  - Tree Surgeon (cuts branches, removes trees alive/dead)

# Research Methodology

✓ The survey changed again in 2009 and changes were as follows:

- CSO population estimates had been revised:

	2001	2002	2005	2007	2009	Increase vs. 2001
Household population	1.259m	1.290m	1.397m	1.525m	1.579m	+25%
Individual population (15+)	2.963m	3.017m	3.218m	3.398m	3.526m	+19%

- Indoor potted plants description were amended to include Orchids & Geraniums.
- Five new codes were added to the ‘source’ question (Asda, Sainsburys, Ikea and Nurseries that sell to the public such as Glanbia Country Life Co-Op).
- A new question was added on ‘Grow Your Own’.



# Reporting Context of this Report

- ✓ The Irish population had grown by 19% since 2001. In 1981, 47% of the population was under 25; this is now 34% (source CSO).
- ✓ Unemployment rose in 2009 to 13% from a low of 4% just a few years previous.
- ✓ New housing unit completions peaked in Ireland in 2006 (93,000) but since then contracted to half this level in 2008 (51,000) and continued to fall during 2009. In 2010 it was estimated that 300,000 units were lying idle in Ireland .
- ✓ Inflation (the Consumer Price Index) was -4.5% in 2009 (deflation), down from a high of +4.9% in 2007.
- ✓ Between 2007 and 2009, retail sales fell by 22% (value) and 19% (volume).
- ✓ Only 1 in 4 adults believed that the economy would improve in the following twelve months (Source: MRBI Confidence Monitor – April 2010).
- ✓ Ireland had just returned to a net migration nation.

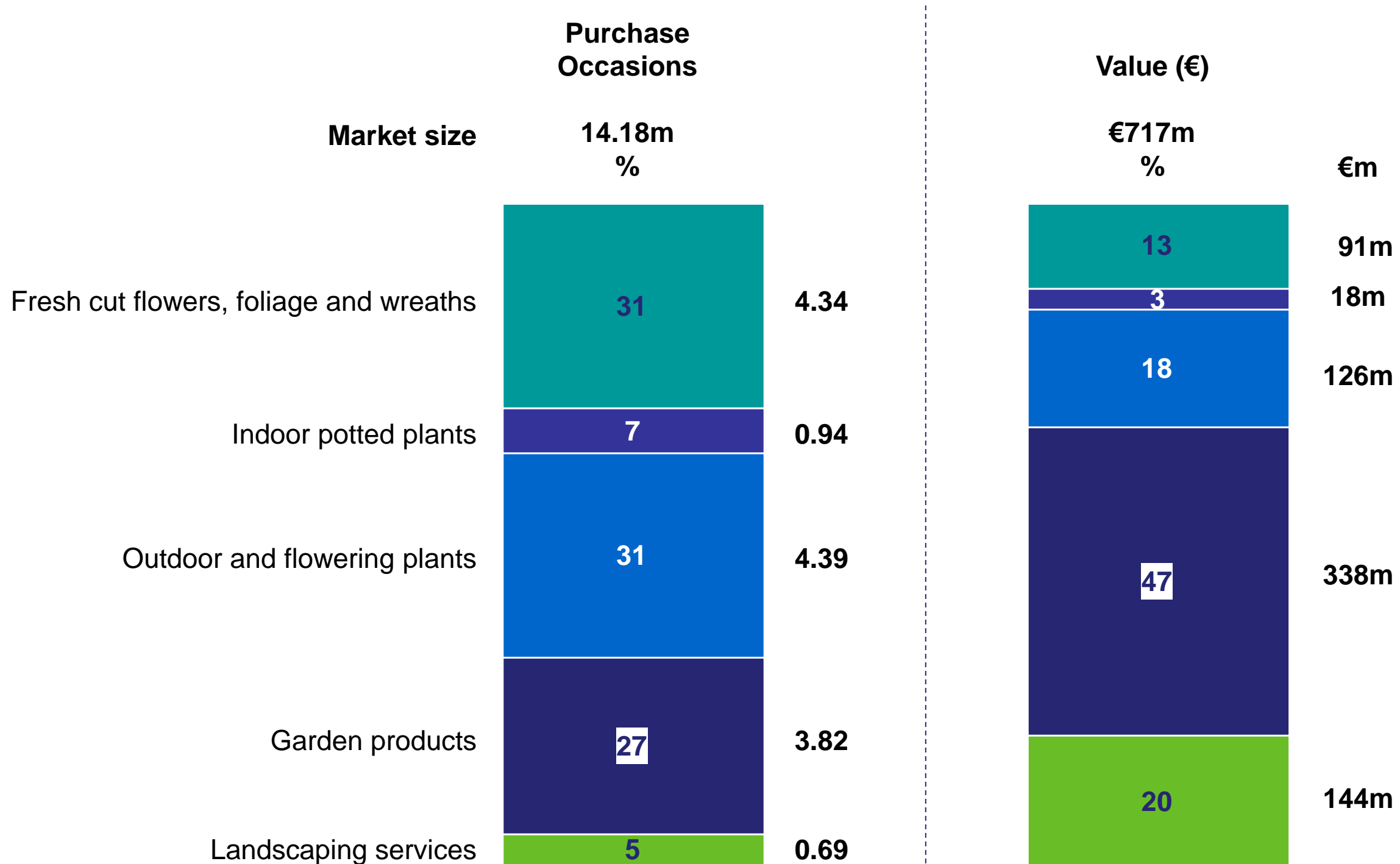


## SECTION 2: Market Size Summary

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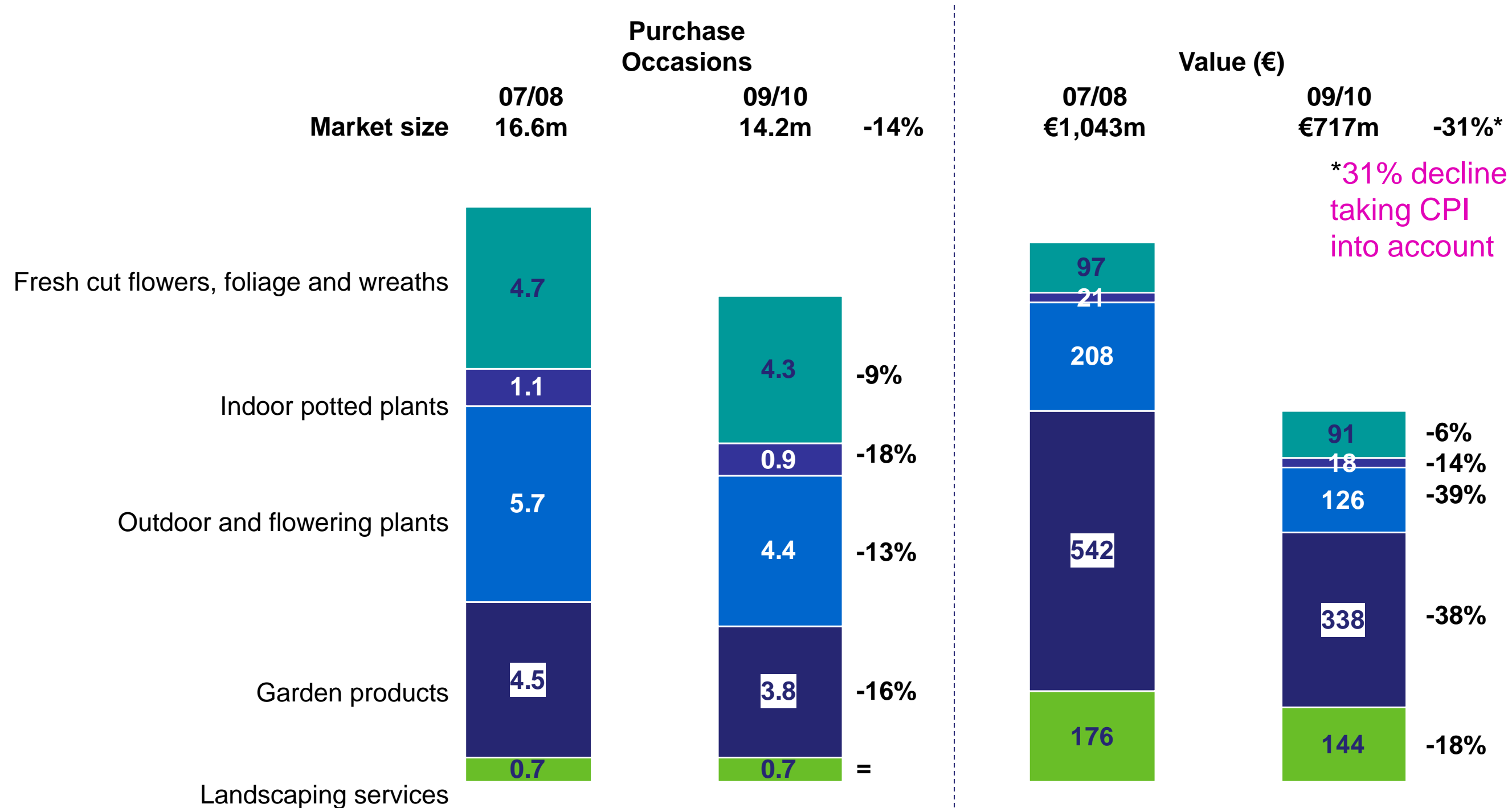
# Market Size Summary – 2009/2010



The amenity market was valued at €717m. Outdoor & flowering plants accounted for 31% of all purchasing occasions, but just 18% of money spent. Larger ticket items (e.g. hard landscaping products), accounted for almost half of the market value.



# Amenity Market Size – 2007/08 Vs. 2009/10



The market has declined by 31% in the past two years which is most noticeable in the outdoor & flowering plants & garden products sectors.

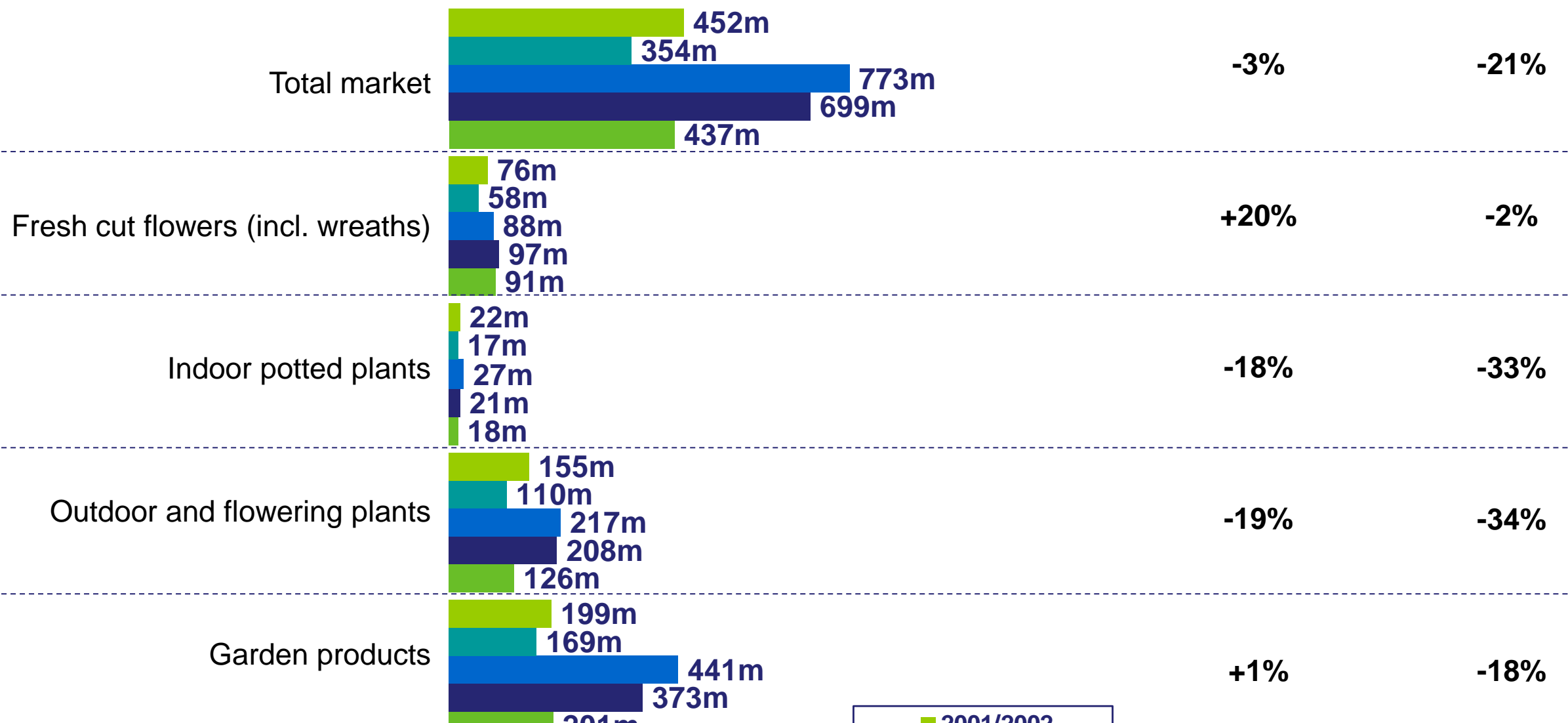
# Amenity Market Size\*\* Growth

## - 2001/2002 Vs. 2009/2010

\*\* excludes new categories since 01/02 and landscaping

% Growth  
01/02 vs. 09/10

% Underlying  
growth



The longer term trend shows that the overall market has reverted to 2001 levels - although the value of outdoor and flowering plants and indoor potted plants have declined by a fifth. In real terms, the market has contracted by 21%.

2001/2002  
2002/2003  
2005/2006  
2007/2008  
2009/2010

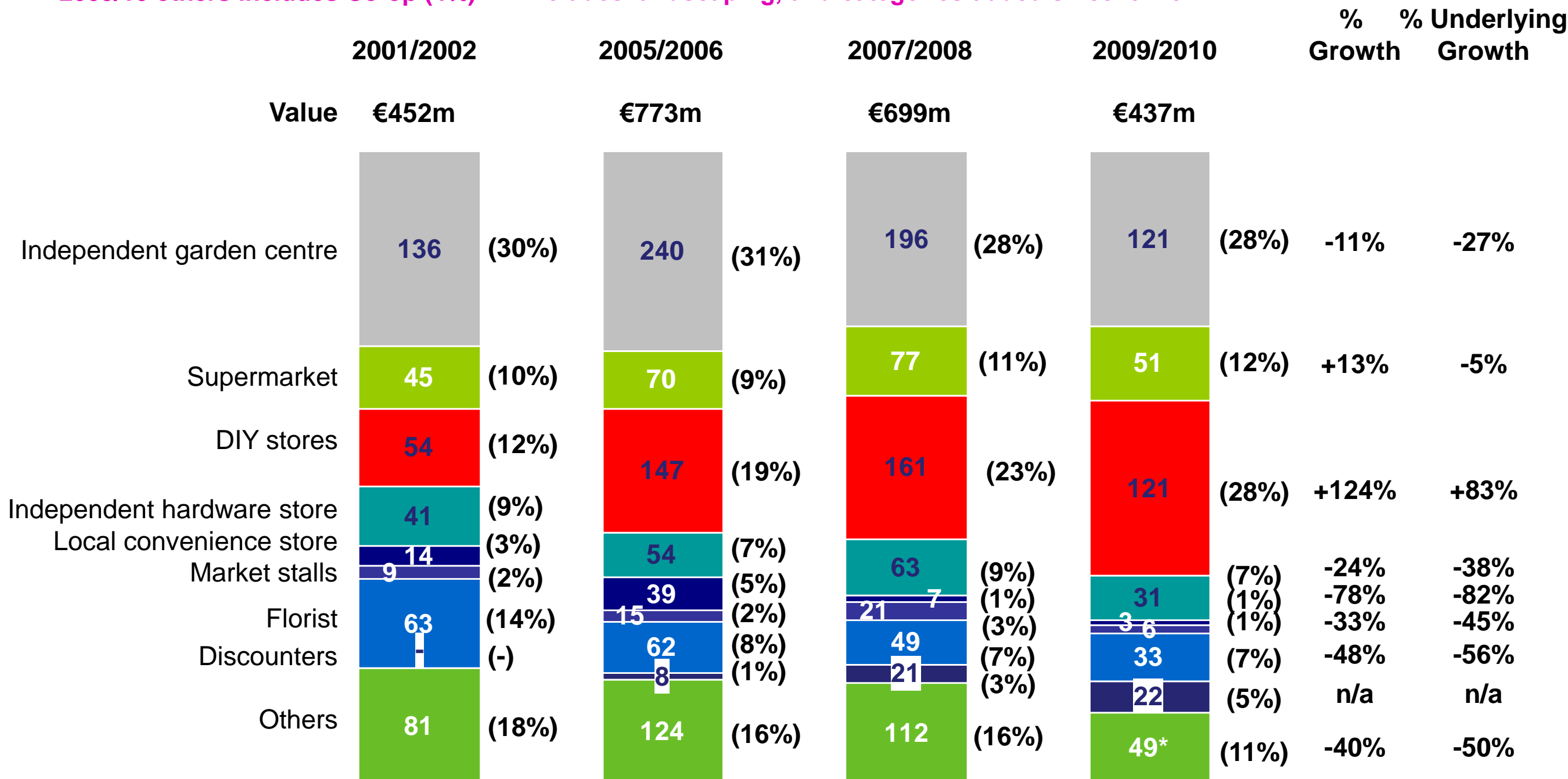
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# Market Share For Amenity Products

## - Source by Retail Channel

\*2009/10 others includes Co-op (4%) \* Excludes landscaping, and categories added since '01/'02



Discounters now hold 5% of the value of the amenity market, at the expense of the independent garden centres (-11%) and more localised outlets. DIY stores (+124%) are also continuing to make inroads with 28% market share.

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# Market Share by Channel by Sector – 2009/2010

	Outdoor & Flowering Plants						Indoor Potted Plants					
	Occasions			Value			Occasions			Value		
	%			%			%			%		
	09/10	07/08	05/06	09/10	07/08	05/06	09/10	07/08	05/06	09/10	07/08	05/06
Independent garden centres	33	35	39	51	51	50	22	25	27	41	39	32
Supermarket	16	16	18	9	7	8	30	27	36	20	19	24
DIY stores	27	23	21	21	17	14	22	21	18	21	23	20
Independent hardware store	3	5	3	1	2	5	1	2	2	1	1	2
Local convenience store	2	2	7	1	1	5	1	1	5	1	1	4
Market stalls	2	3	4	1	4	2	1	2	2	*	2	1
Florist	2	2	3	4	2	5	6	7	6	6	6	5
Discounters	10	8	2	4	3	1	11	11	4	6	6	6
Others	5	7	3	8	14	10	6	4	-	4	4	6

**Half of all 'value spend' on outdoor & flowering plants continues to be channelled through independent garden centres, although 'share of occasions' continues to slide, as DIY stores & discounters make further gains in the market.**

# Market Share by Channel by Sector – 2009/2010

	Fresh Cut Flowers						Garden Products					
	Occasions			Value			Occasions			Value		
	%			%			%			%		
	09/10	07/08	05/06	09/10	07/08	05/06	09/10	07/08	05/06	09/10	07/08	05/06
Independent garden centres	5	6	7	11	8	10	20	21	25	15	16	24
Supermarket	35	39	43	25	25	24	12	12	15	7	8	5
DIY stores	4	3	3	7	5	3	37	34	29	38	29	25
Independent hardware store	*	1	6	*	1	1	9	13	12	14	15	13
Local convenience store	1	2	6	1	2	6	1	2	6	1	2	5
Local Co-op	*	-	-	*	-	-	7	-	-	10	-	-
Market stalls	2	3	4	4	7	4	*	1	-	*	1	1
Florist	25	27	30	32	40	43	*	1	-	*	*	-
Discounters	18	14	5	12	7	2	6	5	2	3	2	1
Others	10	5	1	8	5	7	8	12	11	12	27	26

**Discounters have a 12% share in the fresh cut flowers market. Supermarkets, including discounters, now account for a greater share of spend on fresh cut flowers than florists. DIY stores account for more than a third of purchasing occasions and spend within the garden product category.**



## SECTION 3: Market Research Findings

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# Outdoor and Flowering Plants

# Outdoor & Flowering Plants Category

✓ Definition includes:

- Pre-planted hanging baskets or outdoor containers
- Bulbs/seeds for planting (e.g. daffodils, sweet pea, lettuce seed)
- Trees
- Shrubs/hedges
- Bedding plants (e.g. lobelia, petunias, pansies)
- Herbaceous plants (plants that die down in the winter and grow again in the summer e.g. lupins, chrysanthemums, hostas)
- Herbs/fruit/vegetables (for planting)
- Other outdoor plants (e.g. ornamental grasses, bamboo, ferns, water plants)

# Average Past Week Incidence of Buying Outdoor & Flowering Plants – Quarterly Trend April 2009-April 2010

	Full Year 2005/2006	Full Year 2007/2008	Full Year 2009/2010	Apr-June 2009	Jul-Sept 2009	Oct-Dec 2009	Jan-Apr 2010
	%	%	%	%	%	%	%
Hanging baskets/outdoor containers	4	4	3	6	2	2	1
Bulbs/seeds for planting	8	6	5	8	3	4	5
Trees	3	2	1	2	1	2	1
Shrubs/hedges	4	3	3	4	3	1	1
Bedding plants	9	6	4	10	3	2	2
Herbaceous plants	3	2	2	4	1	1	1
Herbs/fruit/vegetables	5	4	4	8	3	3	4
Other outdoor plants	4	2	1	1	1	1	1

**Incidence of purchasing most categories has shown some decline since last surveys.**

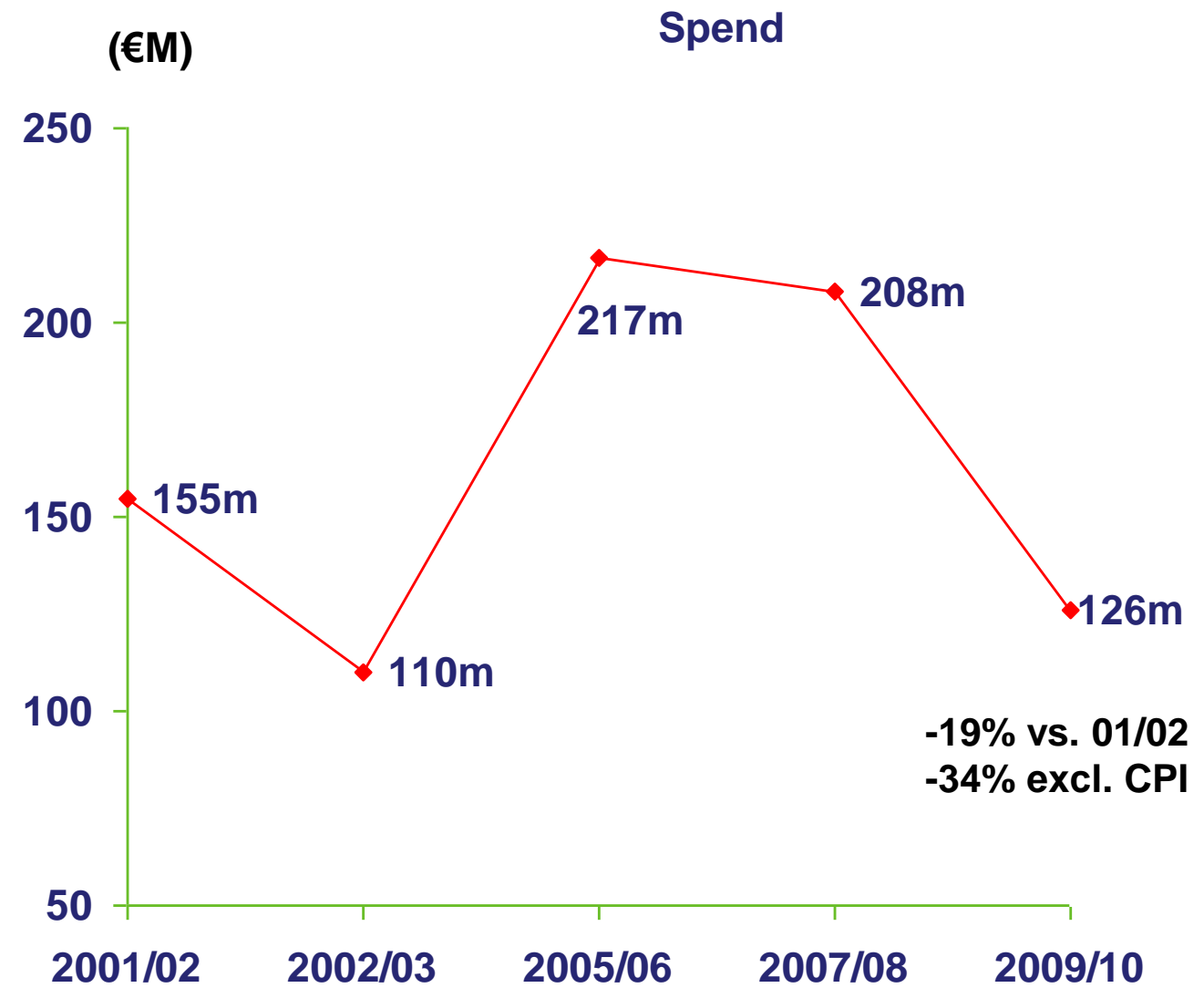
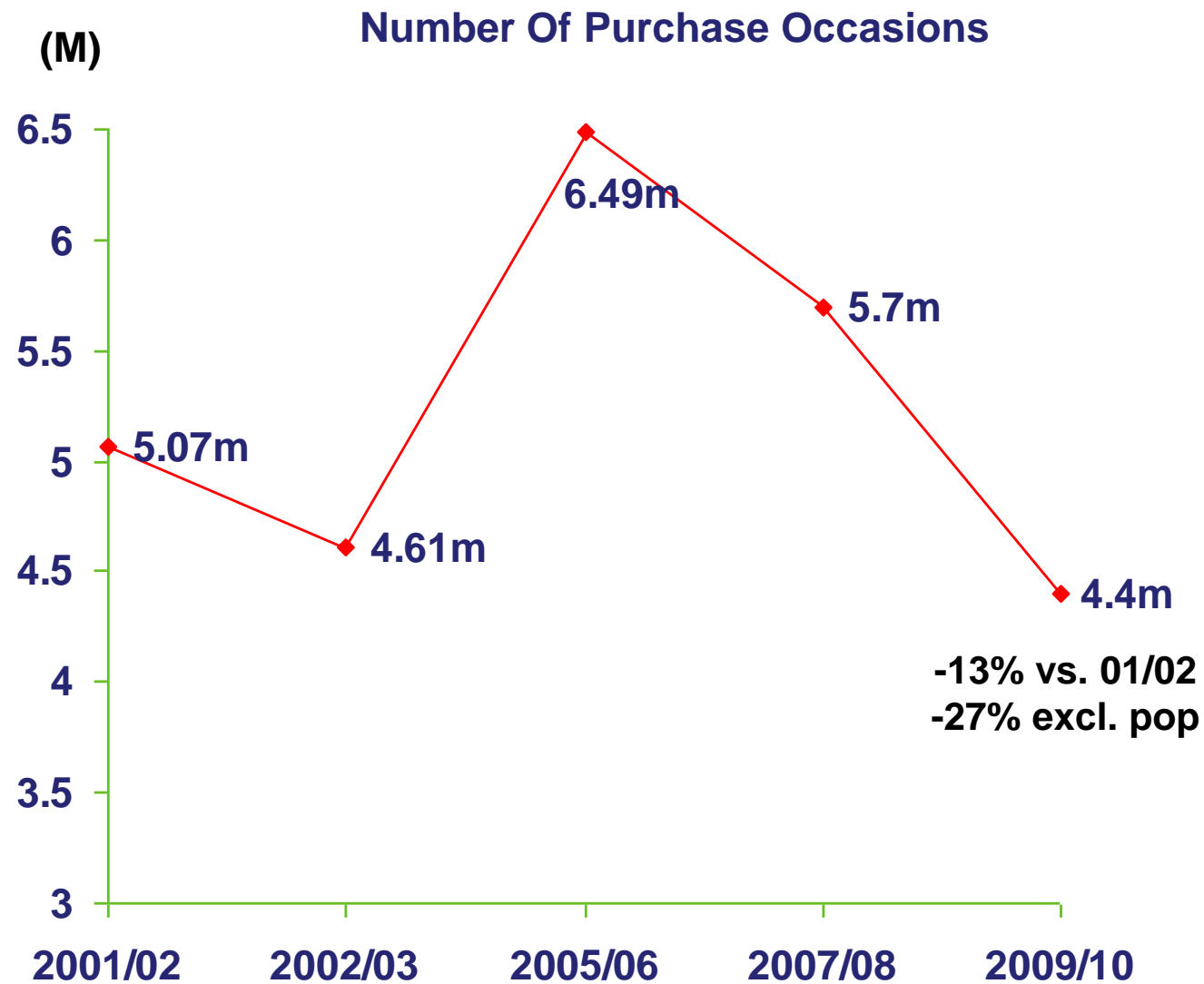
# Incidence of Buying Outdoor & Flowering Plants by Demographics

	Total	Gender		Age				Social Class			Region			
		Male	Female	15-24	25-34	35-54	55+	ABC 1	C2DE	F	Dublin	RoL	Munster	Conn/ Ulster
	%	%	%	%	%	%	%	%	%	%	%	%	%	%
Hanging baskets/out-door containers	3	2	3	2	3	3	3	3	3	2	3	3	3	2
Bulbs/seeds for planting	5	3	6	3	4	6	6	5	5	4	4	6	5	5
Trees	1	1	1	1	1	2	1	1	1	2	1	1	2	1
Shrubs/hedges	3	2	3	1	2	3	4	3	3	3	2	3	3	3
Bedding plants	4	3	6	1	2	5	7	4	4	4	4	4	4	4
Herbaceous plants	2	1	2	1	1	2	2	2	1	2	2	2	1	2
Herbs/fruit/vegetables	4	4	5	4	4	5	4	5	4	5	4	5	4	5
Other outdoor plants	1	1	1	1	1	1	1	1	1	1	1	1	1	1

**The purchase of shrubs/hedges and bedding plants was highest amongst those over 55 yrs, while females play a key role in purchasing all types of garden plants.**



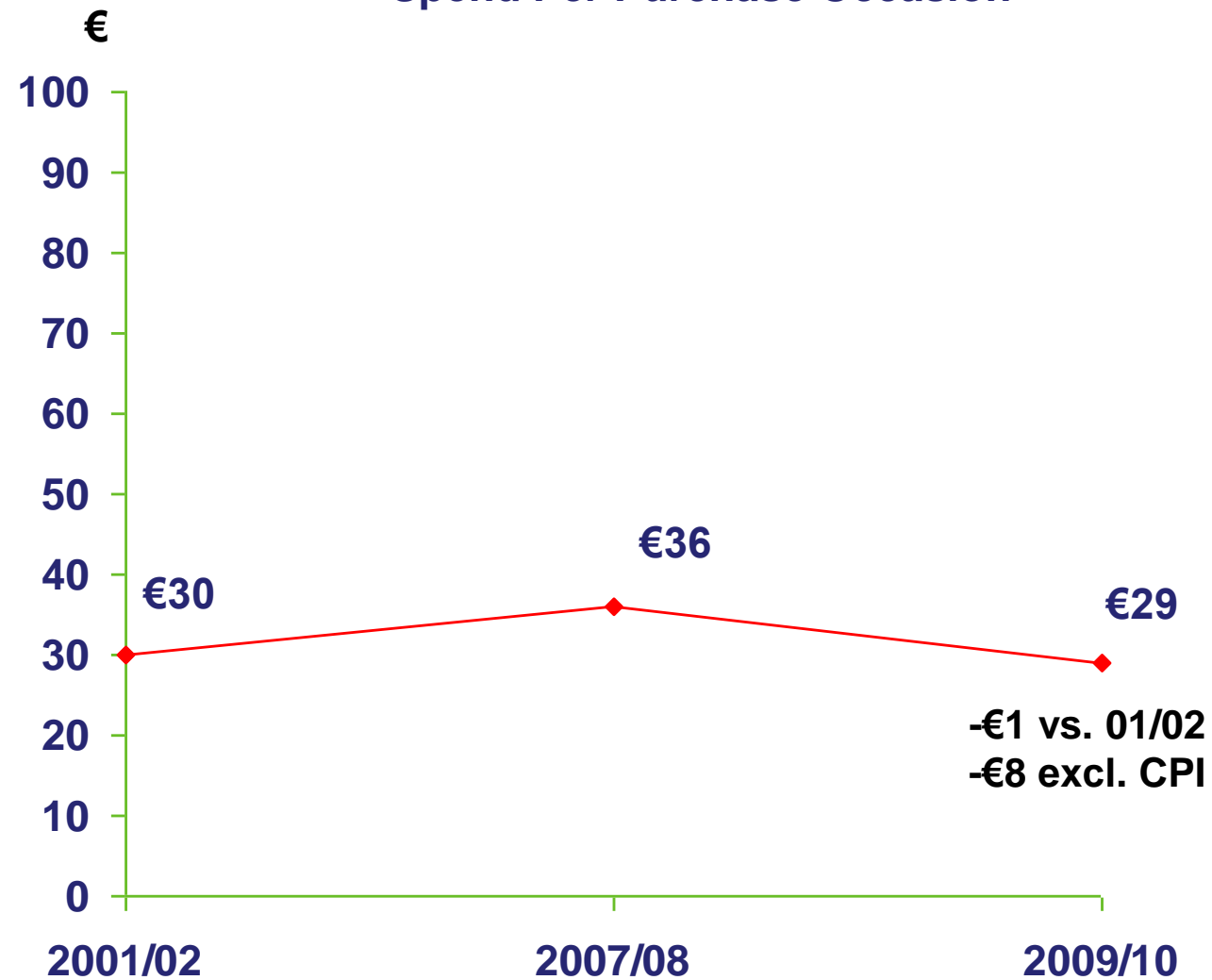
# Summary of Outdoor & Flowering Plants Market



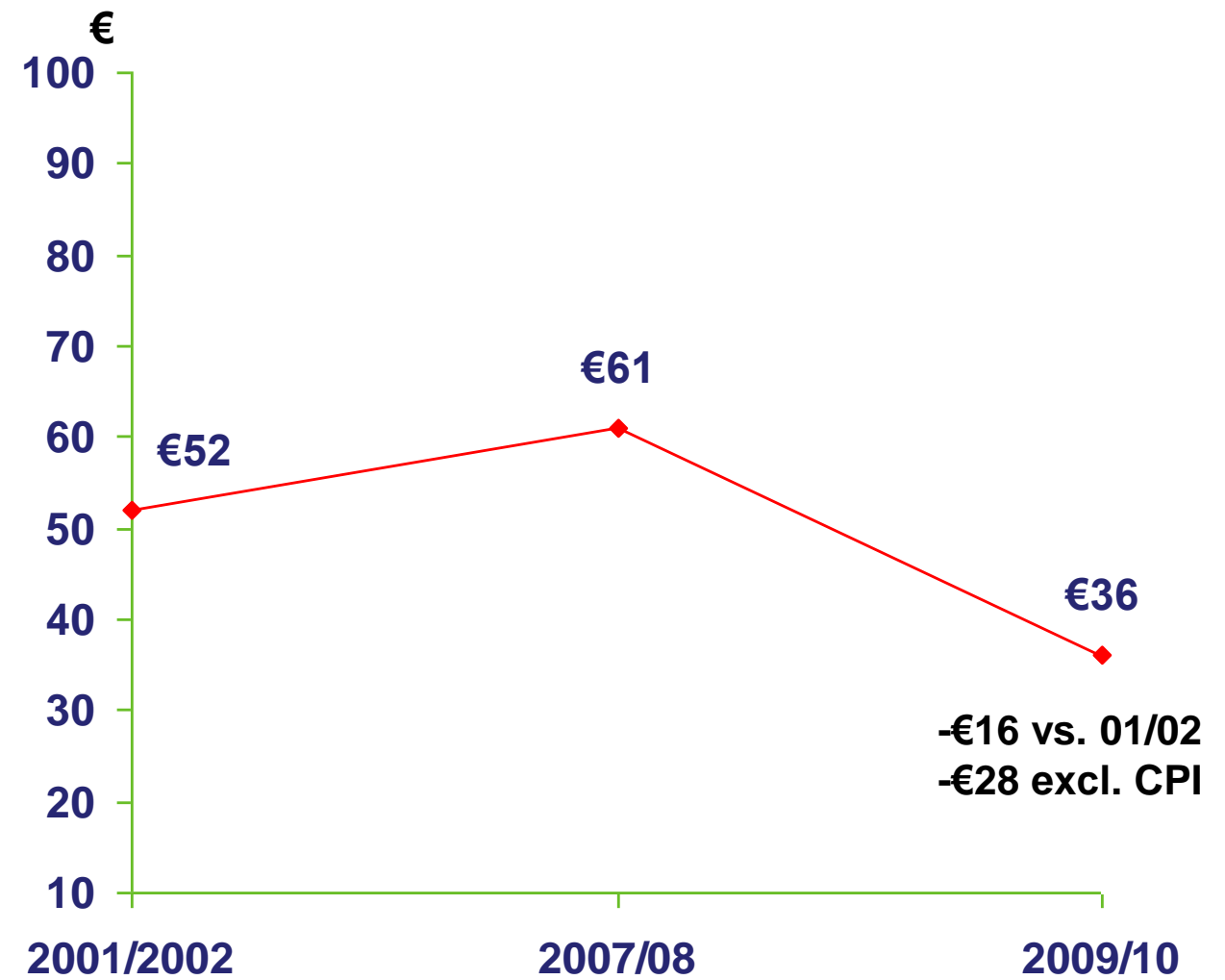
The market value stands at €126m, down 19% since 01/02, and down €82m over the previous two years. Purchase occasions have fallen 13% since 01/02, despite an increase in the population of 19% over this period.

# Summary Of Outdoor & Flowering Plants Market

## Spend Per Purchase Occasion



## Spend Per Capita



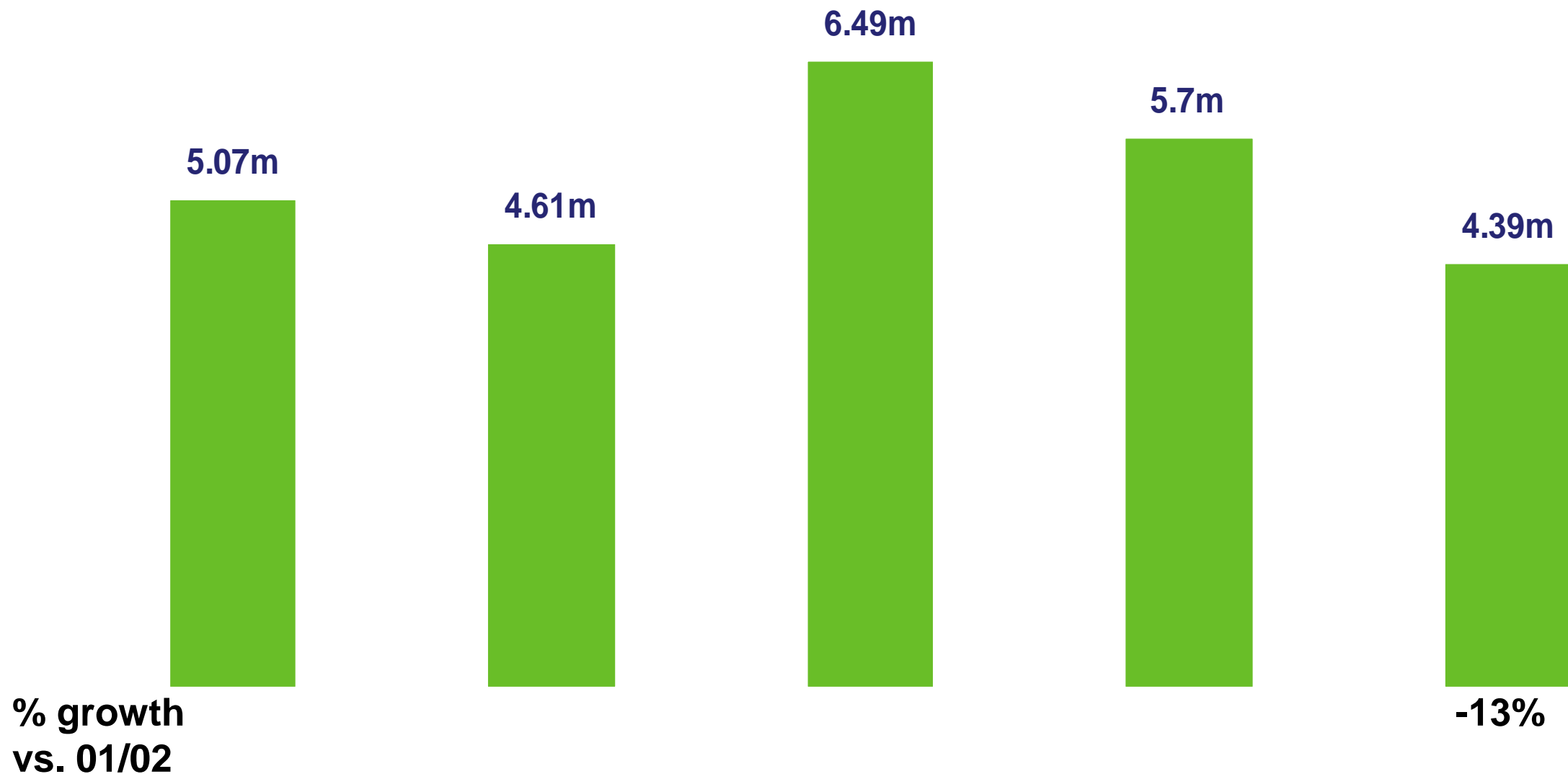
Spend per purchase occasion has dropped by €1, but taking inflationary changes into account, this equates to an €8 decline.

Per capita occasions were down 27%

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# Number Of Purchase Occasions – Outdoor & Flowering Plants

2001/2002      2002/2003      2005/2006      2007/2008      2009/2010

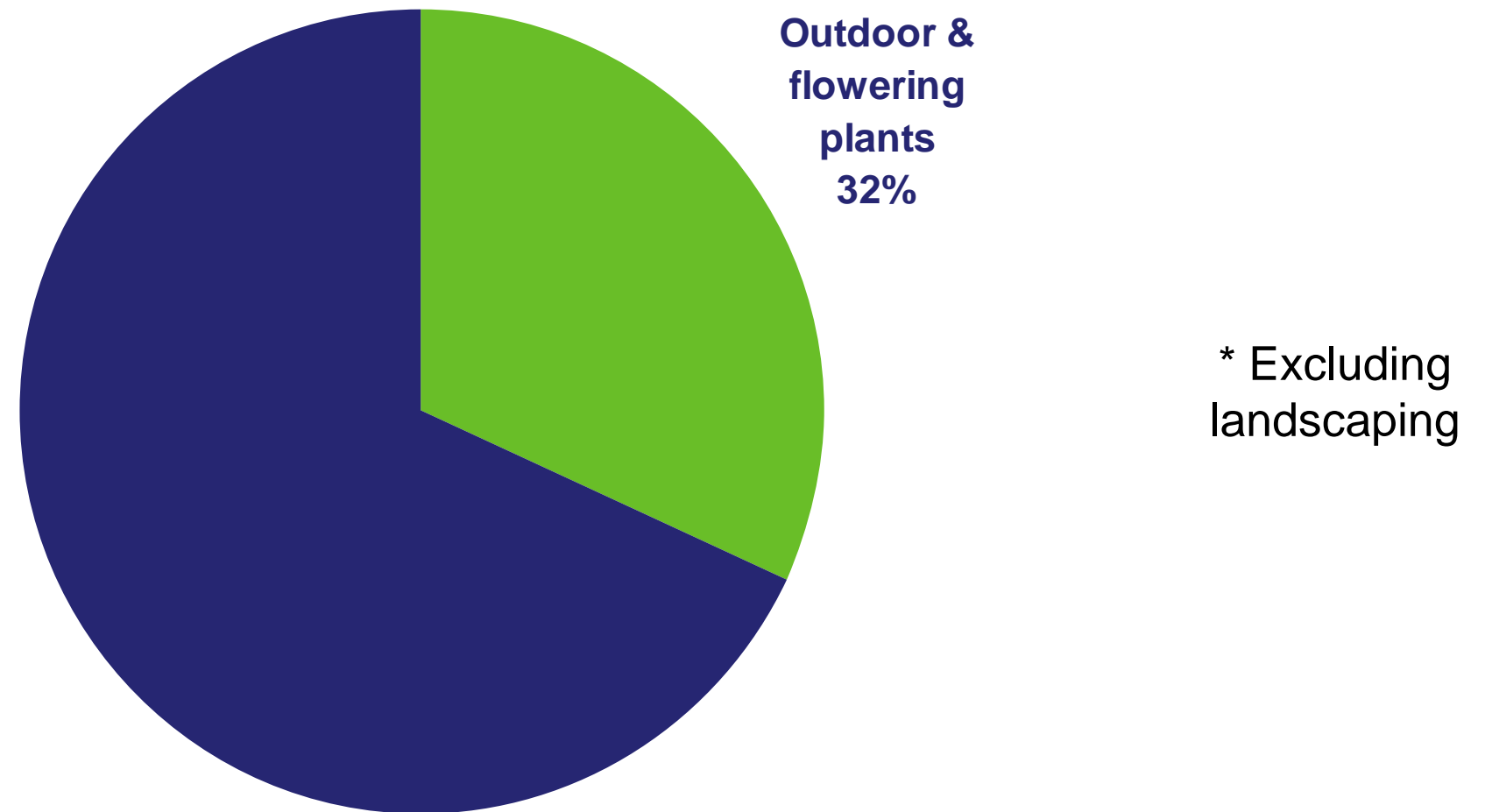


Purchasing occasions have dropped by 13% since 01/02, and by a quarter in two years ( -23% vs. 07/08)

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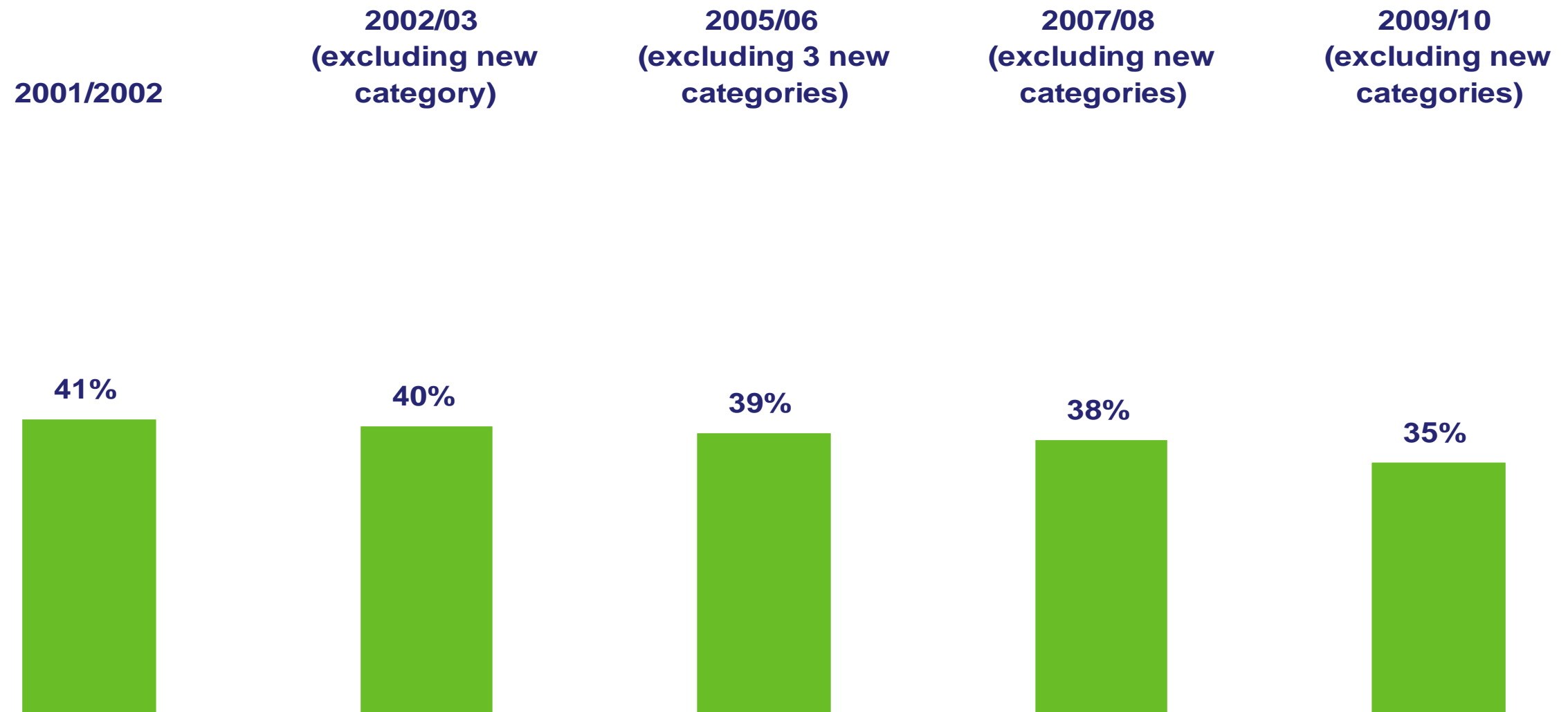
# Purchase Occasions for Outdoor and Flowering Plants as a Proportion of Total Amenity Market\*



**Outdoor and flowering plants account for 32% of the amenity market purchase occasions.**

# Purchase Occasions Share Trend: Outdoor & Flowering Plants as a Proportion of the Total Amenity Sector\*

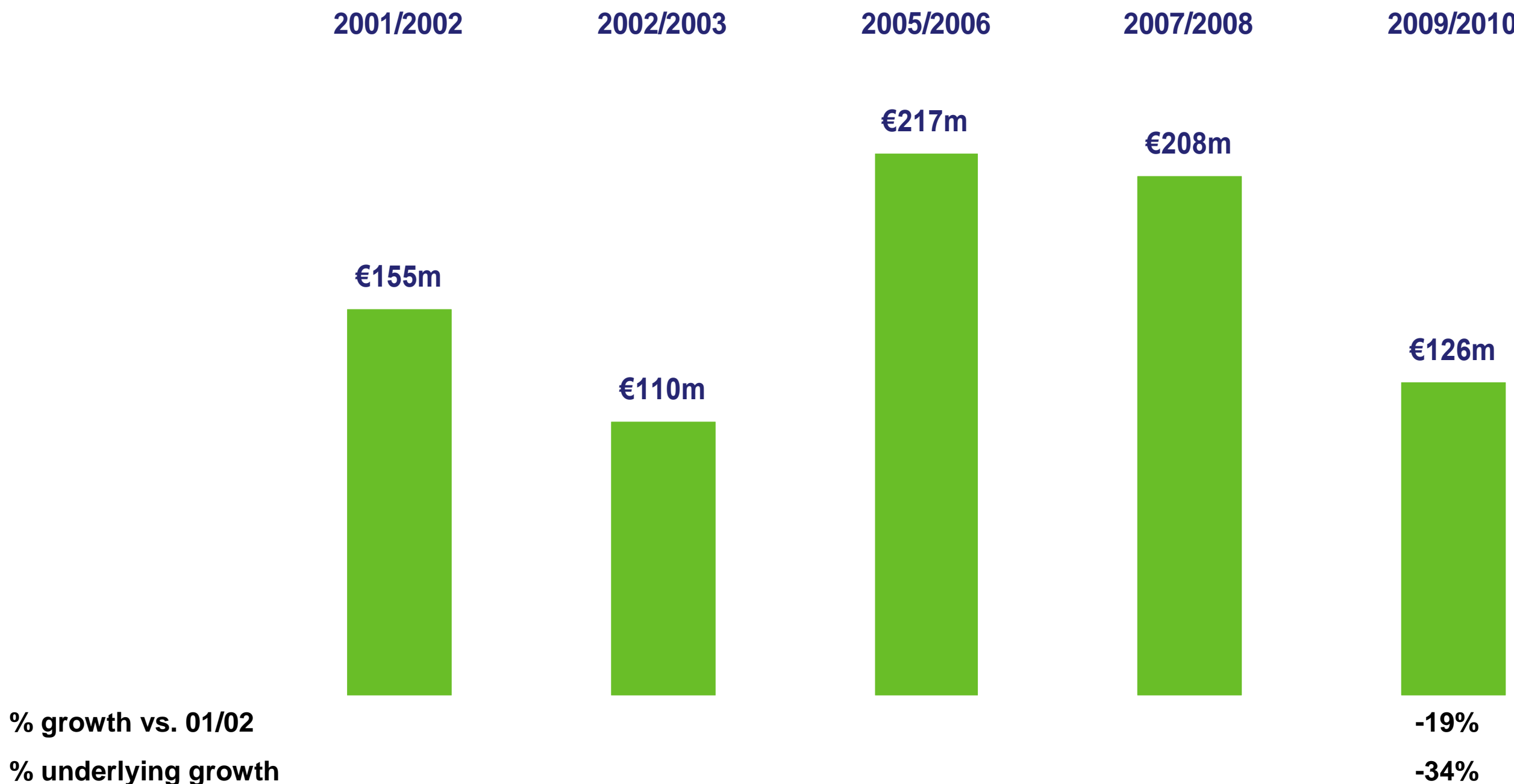
\* Excludes landscaping and new categories added since 2001/02.



In the longer term, outdoor and flowering plants now represent a smaller proportion of purchasing activity compared with eight years ago. Share of occasions has been steadily eroding over this period.



# Value of Purchases – Outdoor & Flowering Plants



The value of the outdoor and flowering plants market has fallen by 19% since 01/02. Taking inflationary changes into account, the real change is more significant – a decline of 34%. Market spend peaked in the period between 2005 & 2007.

# Breakdown of Value of Outdoor & Flowering Plants

	2001/2002	2002/2003	2005/2006	2007/2008	2009/2010	% growth (01/02 vs. 09/10)	% underlying growth
	€m	€m	€m	€m	€m		
Total	155	110	217	208	126	-19	-34
Hanging baskets/outdoor containers	9	11	19	29	15	+67	+36
Bulbs/seeds for planting	18	15	22	19	13	-27	-41
Trees	34	15	47	61	23	-32	-44
Shrubs/hedges	39	29	45	40	33	-15	-31
Flowering plants	32	20	n/a	n/a	n/a	n/a	n/a
Bedding plants	n/a	4	39	23	16	n/a	n/a
Herbaceous plants	n/a	2	10	10	8	n/a	n/a
Herbs/fruit/vegetables	9	7	16	15	14	+55	+27
Other outdoor plants	11	7	19	11	4	-64	-69

**Two products have bucked the trend; hanging baskets/outdoor containers and herbs/fruit/vegetables for planting, pointing to trends in convenience and the 'grow your own' market.**

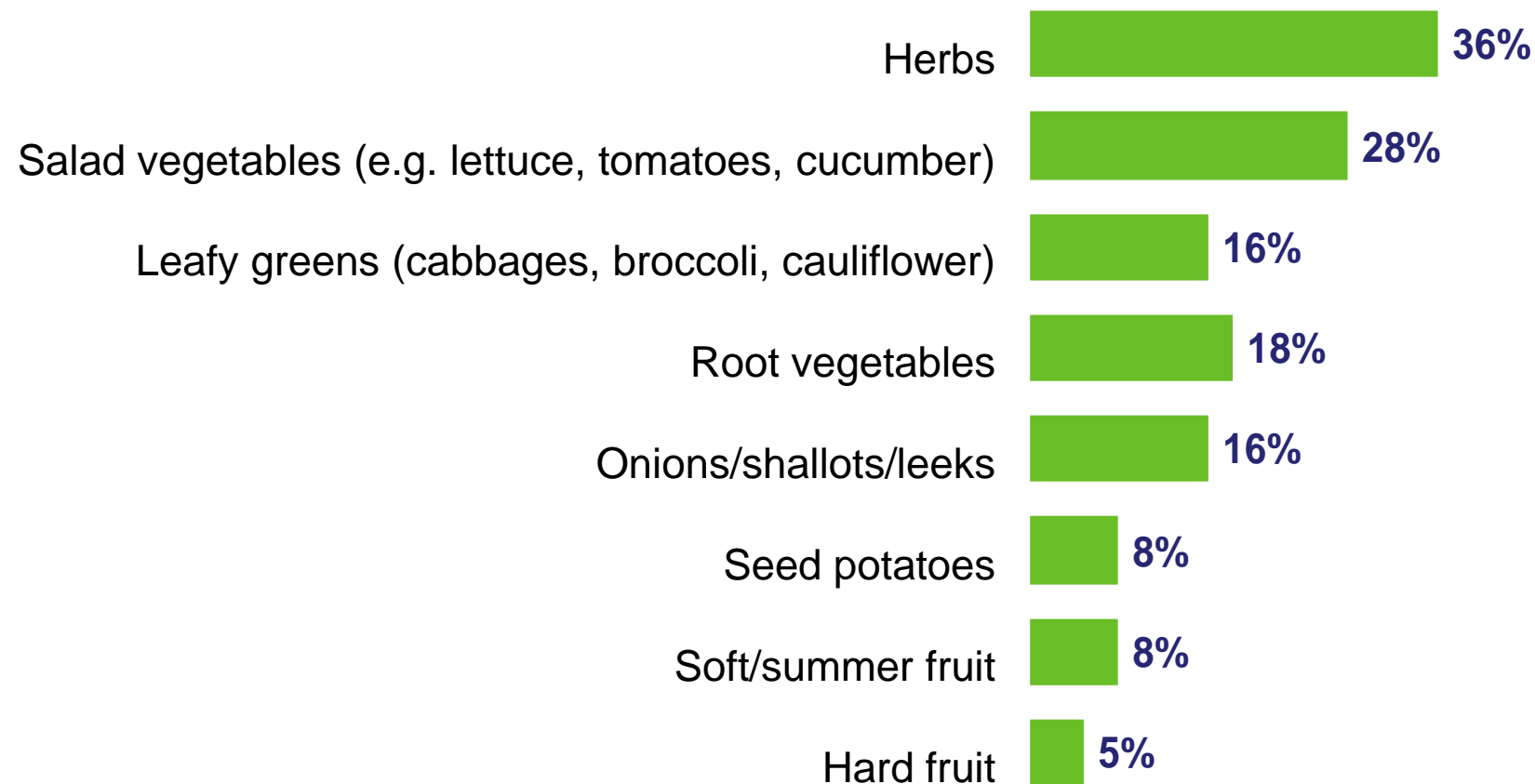
# 'Grow Your Own' Market Summary

 4% Incidence of purchasing herbs/fruit and vegetables for planting

Value of market €14m (+40%)

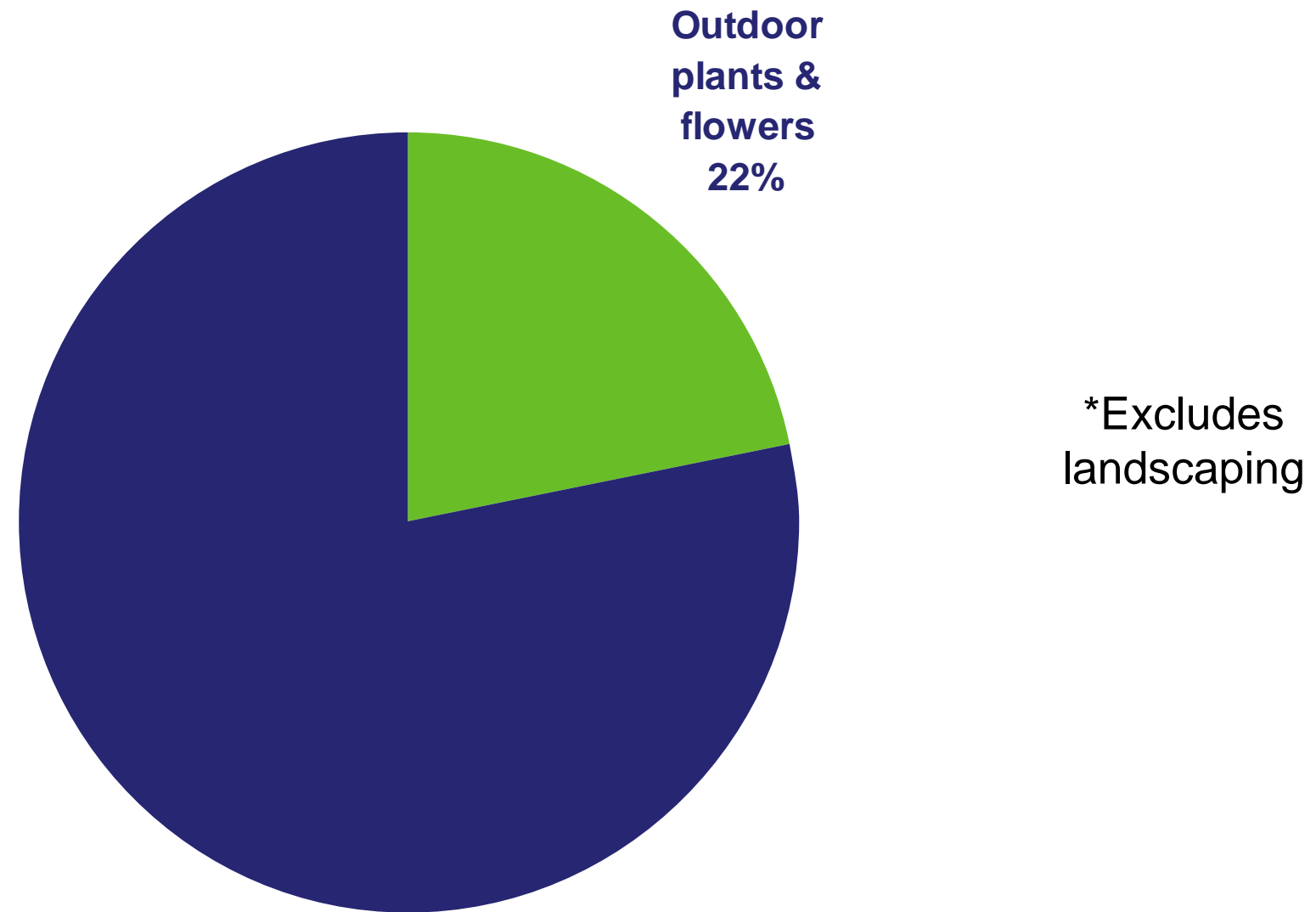
Purchasing occasions 923,000 (+14%)

## Main products purchased



**Herbs, followed by salad vegetables, were found to be the most commonly purchased products for GIY planting. Fruit for planting was found to be more niche.**

# Value of Outdoor and Flowering Plants as a Proportion of Total Amenity Market\*

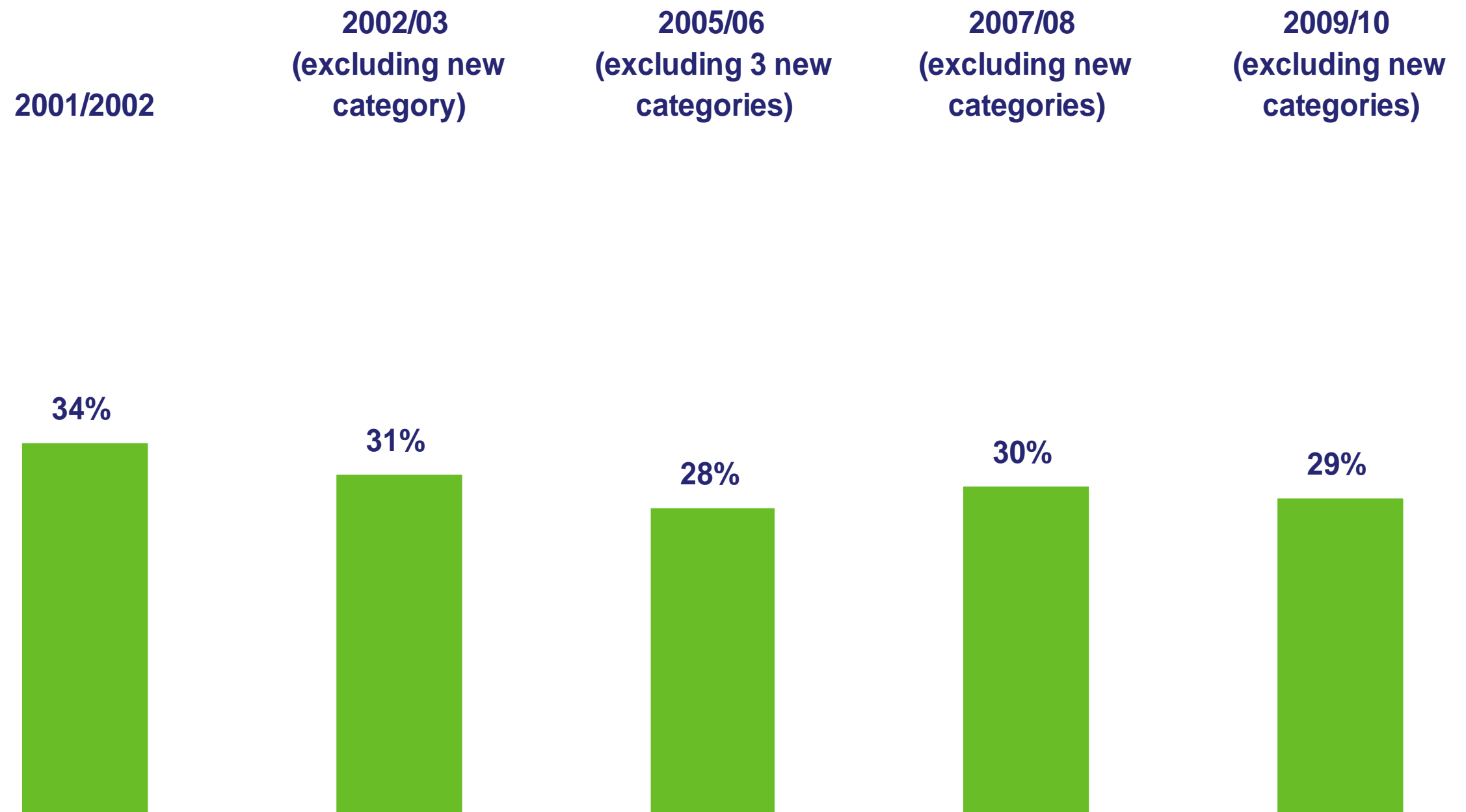


Outdoor and flowering plants account for 22% of all spend in the amenity market.



# Value Share Trend: Outdoor & Flowering Plants as a Proportion of Total Amenity Sector\*

\* Excludes Landscaping & new categories added since 2001/02



The longer trend shows that the 'share of spend' of Outdoor & Flowering Plants has contracted somewhat.

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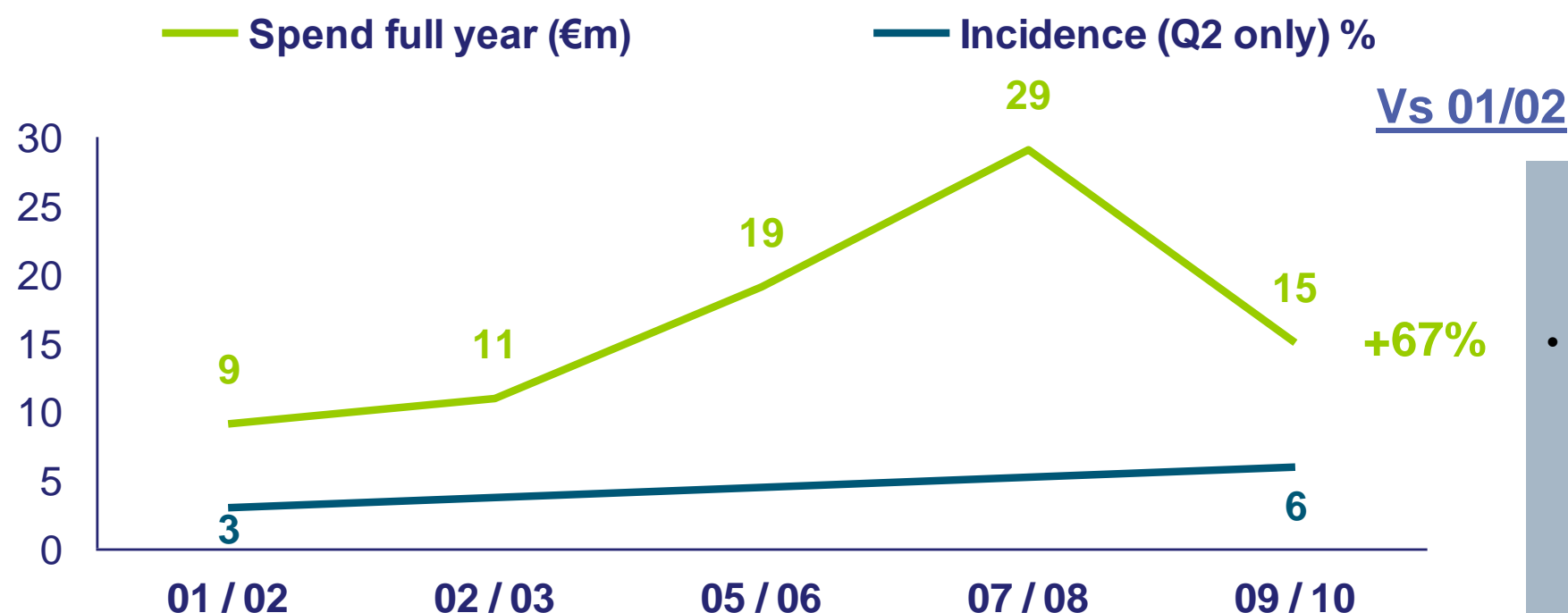
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# Average Spend Per Purchase Occasion – Outdoor and Flowering Plants



The 'average spend per purchase occasion' in the outdoor and flowering plants market peaked at €36 in 2007/08. Consumers now pay an average of €29 per purchase, down €1 from 01/02. This equates to a fall of €8 in real terms.

# Hanging Baskets



## Product Summary

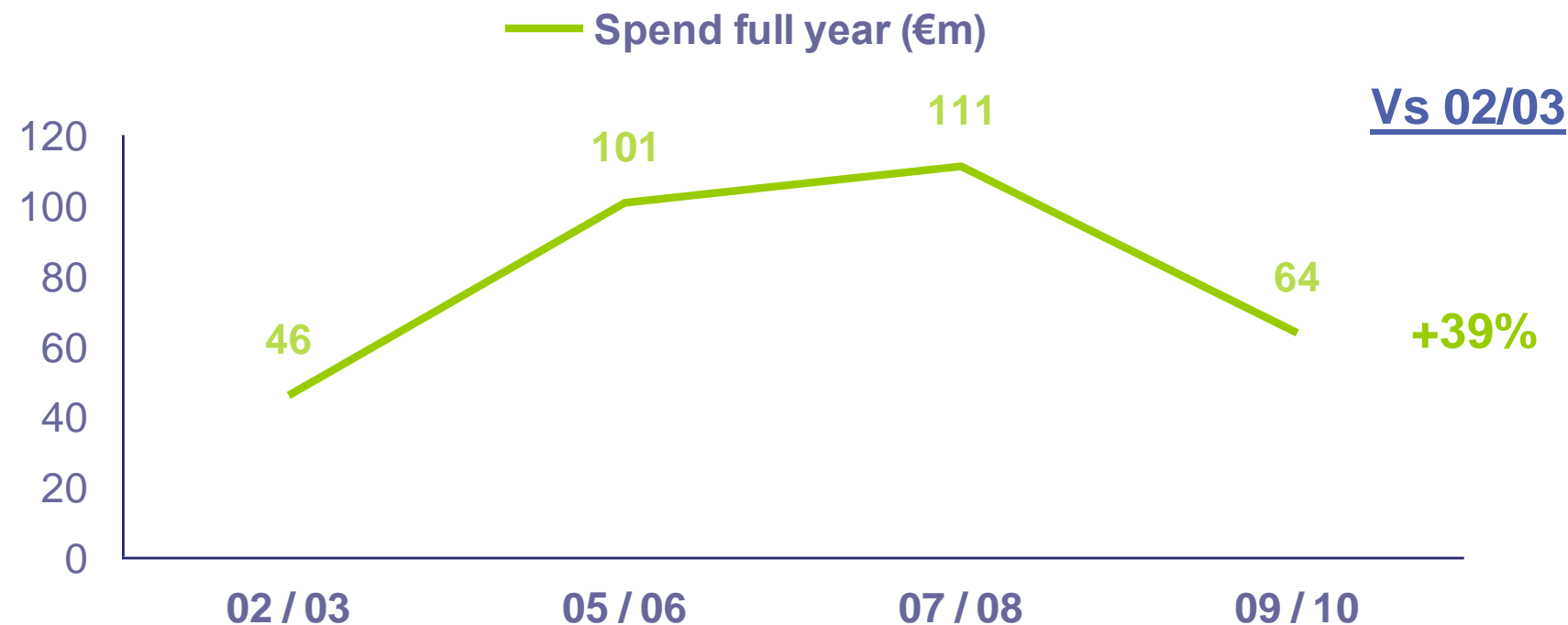
- Hanging baskets/pre-planted containers have grown in value by 67% since '01/'02, though value has dropped back significantly since the 'boom' peak of 2007
- The increase of purchasing this category (comparing April-June figures only) has doubled in eight years.
- Likewise, purchasing occasions have grown by 70%, outstripping by some way, the growth in population.
- Spend per purchase occasion has remained at around €29, suggesting it is the greater number of purchasing occasions which is driving the market.

Occasions (m)	0.30	0.47	0.60	0.75	0.51	+70%
Spend per purchase occasion	€29.61	€23.21	€31.56	€38.46	€29.41	(-€0.20) -1%
Spend per capita	€3.04	€3.65	€5.90	€8.53	€4.25	(+€1.21) +40%
Individual Population (15+)	2.963m	3.017m	3.218m	3.398m	3.526m	+19%

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# Outdoor Plants\*

\* Including herbaceous borders, shrubs/hedges, trees

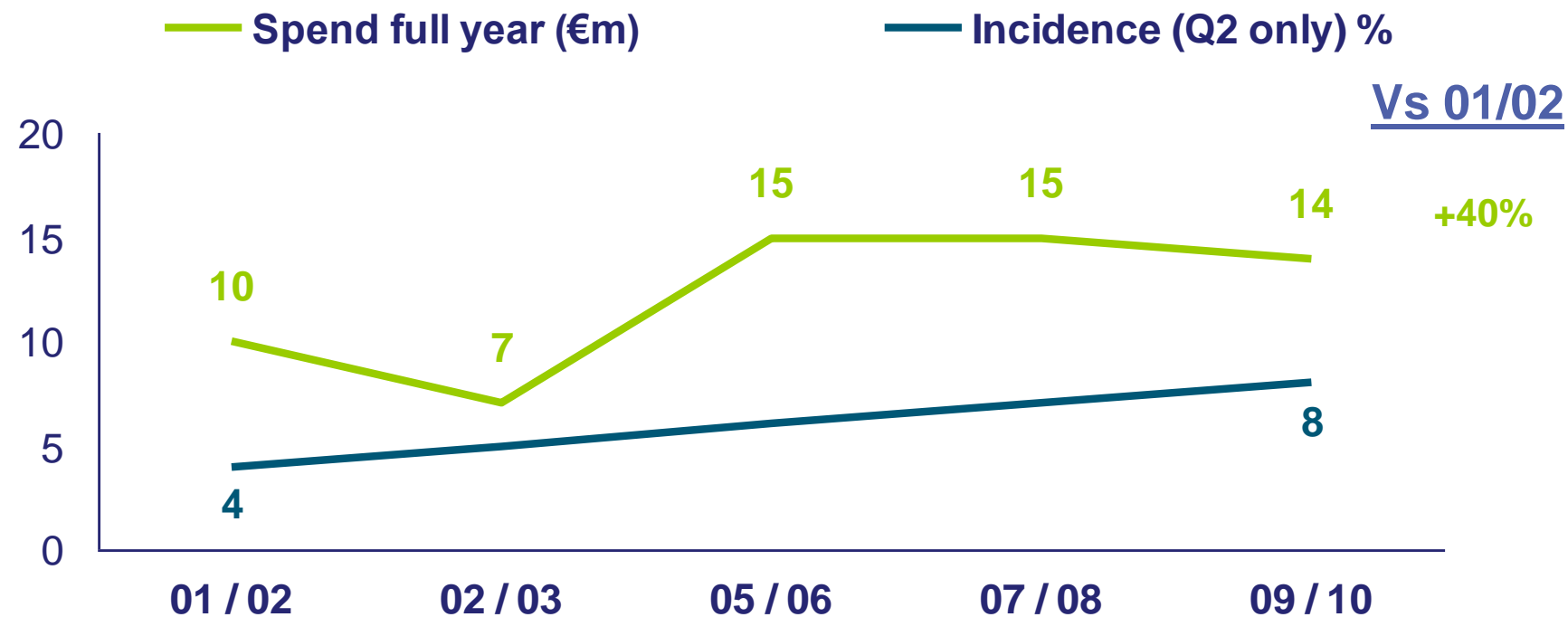


## Product Summary

- In the longer term, the value of trees, shrubs/hedges and herbaceous border plants market has grown by 39% since 2001/02. The market peaked between 2005 and 2007, but has dropped by a third in the past two years.
- Growth has been driven by an increase in the spend per purchase occasion, as purchasing occasions themselves remained largely static.
- The peak in the spend per occasion phenomenon was primarily due to significant growth in purchasing of trees in particular. Since the last survey, spend on trees has contracted by two thirds.

Occasions (m)	1.01	1.53	1.40	0.995	-1%
Spend per purchase occasion	€45.50	€66	€79.29	€64.32	(+€18.82) +41%
Spend per capita	€15.25	€31.39	€32.66	€18.15	(+€2.90) +19%
Individual Population (15+)	3.017m	3.218m	3.398m	3.526m	+19%

# Herbs/Fruit & Vegetables for Planting



Occasions (m)	0.81	0.59	0.89	0.97	0.923	+14%
Spend per purchase occasion	€12.42	€11.97	€16.78	€15.46	€15.17	(+€2.75) +22%
Spend per capita	€3.37	€2.32	€4.66	€4.41	€3.97	(+€0.60) +18%
Individual Population (15+)	2.963m	3.017m	3.218m	3.398m	3.526m	+19%

## Product Summary

- The incidence of buying herbs/fruit and vegetables for planting (based on April-June comparisons) has doubled since 2001.
- Spend is up 40% to €14m. This is being driven by an increase in spend per purchase occasion primarily, but purchasing occasions have also increased by 14%.
- Per capita spend on this category has increased by a fifth since 2001.
- The items most purchased in the 'grow your own' category include salad vegetables and herbs, followed by root vegetables, leafy greens and onions/shallots/leeks.

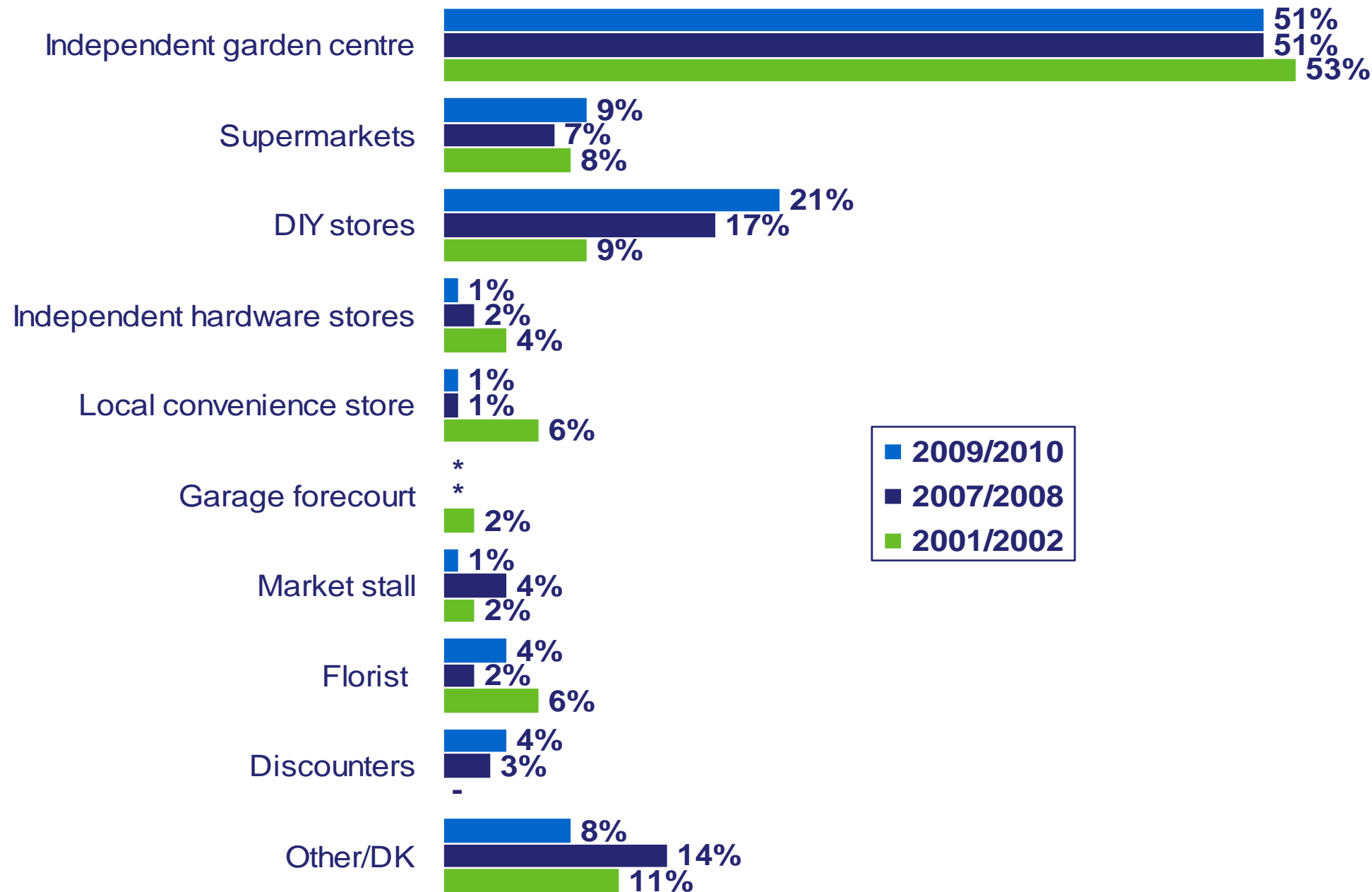


# Average Spend Per Purchase Occasion

	2005/2006	2007/2008	2009/2010
✓ Hanging baskets/outdoor containers	€32	€39	€30
✓ Bulbs/seeds for planting	€17	€16	€16
✓ Trees	€118	€135	€79
✓ Shrubs/hedges	€64	€69	€81
✓ Bedding plants	€24	€21	€19
✓ Herbaceous plants	€25	€29	€28
✓ Herbs/fruit/vegetables	€18	€16	€15
✓ Other outdoor plants	€32	€37	€30

Spend on trees has demonstrated the greatest fall, with buyers spending €56 less per purchase than two years ago. The amount spent on shrubs on each occasion, however, has actually shown real growth. Consumers spend an average of €15 on herbs/fruit/vegetables for planting on each occasion.

# Value Market Share for Outdoor & Flowering Plants by Retail Channel



While independent garden centres continue to account for half of all spend, DIY stores and supermarkets are increasing their value share.

# Channels for Outdoor & Flowering Plants: 2009/2010 by Category (Purchase Occasion Based)

	Total Category	Hanging Baskets/ Outdoor containers	Bulbs/ seeds for planting	Trees	Shrubs/ hedges	Bedding plants	Herb- aceous plants	Herbs/ fruit/ vegetables	Other Outdoor plants
	%	%	%	%	%	%	%	%	%
Independent garden centre	33	26	26	52	51	34	43	25	43
Supermarket	16	10	20	11	7	13	8	29	8
DIY stores	27	40	26	17	20	31	32	18	33
Independent hardware store	3	3	5	*	1	2	2	3	-
Local convenience store	2	1	1	2	1	1	*	3	-
Co-op	2	*	3	1	1	1	1	3	-
Market stalls	2	2	1	1	2	2	2	2	-
Florist	2	4	2	1	1	3	2	1	9
Discounters	10	10	11	6	10	10	4	11	5
Others	3	4	8	9	6	3	6	5	2

**Garden centres attract the majority of purchases of trees, shrubs and herbaceous plants, while 40% of purchases of hanging baskets – the product exhibiting the most robust growth – is channelled through DIY stores.**

# Motivation for Purchase – Outdoor & Flowering Plants: 2009/2010 (Purchase Occasion Based)

	Hanging Baskets/ Outdoor containers	Bulbs/ seeds for planting	Trees	Shrubs/ hedges	Bedding plants	Herbaceous plants	Herbs/ fruit/ vegetables	Other Outdoor plants
	%	%	%	%	%	%	%	%
For the home	41	18	13	20	20	19	34	26
For the garden	45	72	70	72	69	74	60	50
Special occasion (birthday, Valentines etc.)	4	2	4	2	4	1	-	10
Gift	5	5	11	4	5	2	3	11
Other	5	3	2	2	2	3	3	3

**Buying for the garden represents the majority of most plant purchases except for hanging baskets where motivations are spread evenly.**

# Outdoor and Flowering Plants – Summary

- ✓ The outdoor and flowering plants market is worth €126m – down 19% since first measured in 2001. Accounting for inflationary changes over this period, real contraction in the market is more like 34%.
- ✓ However, there has been long term sustained growth in value in two products – hanging baskets/pre-planted containers (+67%) and herbs, fruit and vegetables for planting (+55%). This is reflecting two key underlying changes in consumer behaviour; the need for convenience, and the resurgence in the 'grow your own' market.
- ✓ Purchasing occasions of hanging baskets have grown by 70% since 2001/02, which is driving the market (spend per purchase occasion has remained flat). On the other hand, with herbs/fruit and vegetables for planting, it has been an increased spend per purchase occasion which has primarily driven up the market value; though purchasing occasions have increased by 14%.
- ✓ Spend on trees had expanded significantly between 2005 and 2007; however, this market has declined substantially since then, presumably correlating to the sharp reduction in new housing completions.
- ✓ There were 13% fewer purchases of outdoor and flowering plants made in 2009/10, compared with 2001/02, despite an increase in population of almost a fifth during this period.
- ✓ In contrast, there has been a relatively modest fall in the spend by consumers on each purchase occasion (-€1), suggesting that it is the decline in activity which has been mainly responsible in the fall in market value.



# Indoor Potted Plants

# Indoor Potted Plants

✓ Definition includes:

- Indoor potted plants (e.g. orchids, geraniums, spider plants, primroses)

# Average Past Week Incidence of Buying Indoor Potted Plants April 2009-April 2010 - Quarterly Trend

	Full Year 2005/2006	Full Year 2007/2008	Full Year 2009/2010	Apr-Jun 2009	Jul-Sept 2009	Oct-Dec 2009	Jan-Apr 2010
	%	%	%	%	%	%	%
Indoor potted plants	8	5	5	7	5	4	3

**The incidence of buying indoor potted plants has remained static since two years ago. However, the incidence of purchase is three percentage points lower than when first measured in 2001/02.**

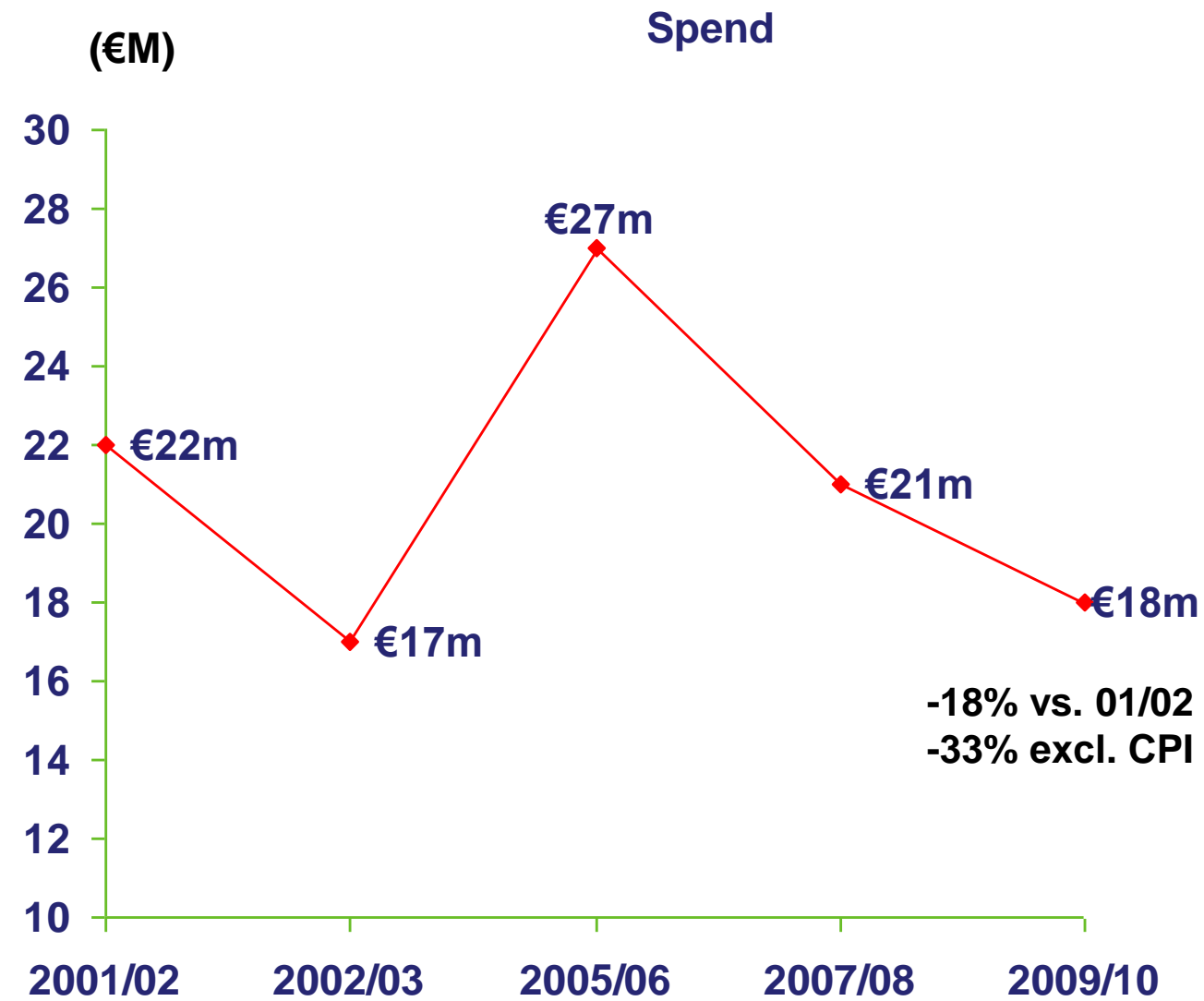
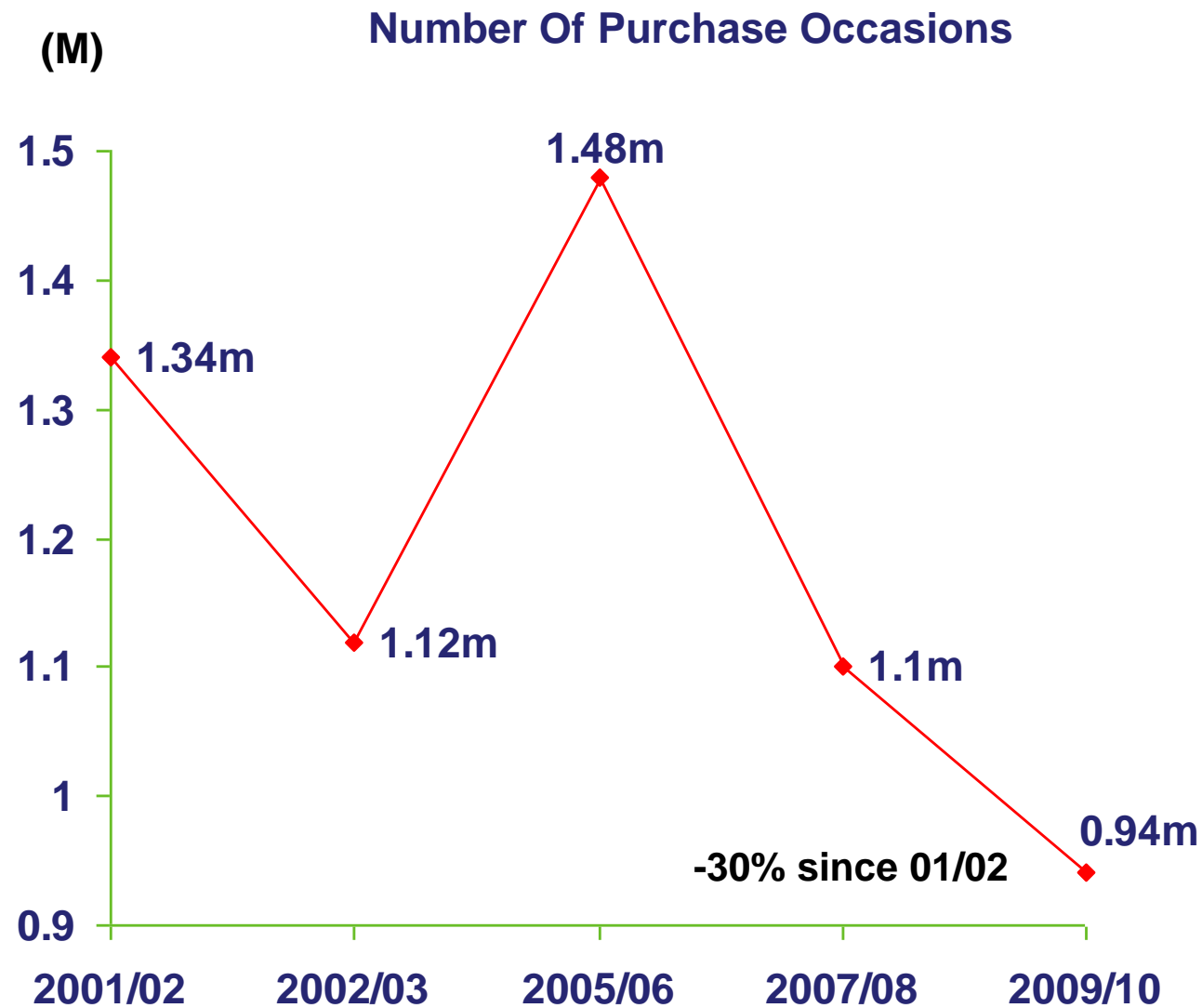
# Incidence of Buying Indoor Potted Plants

## - Demographics of Purchasers

	Total	Gender		Age				Social Class			Region			
		Male	Fe-male	15-24	25-34	35-54	55+	ABC1	C2DE	F	Dub-lin	RoL	Mun-ster	Conn/Ulster
		%	%	%	%	%	%	%	%	%	%	%	%	%
Indoor potted plants	5	4	6	3	4	5	7	5	5	4	5	5	5	5

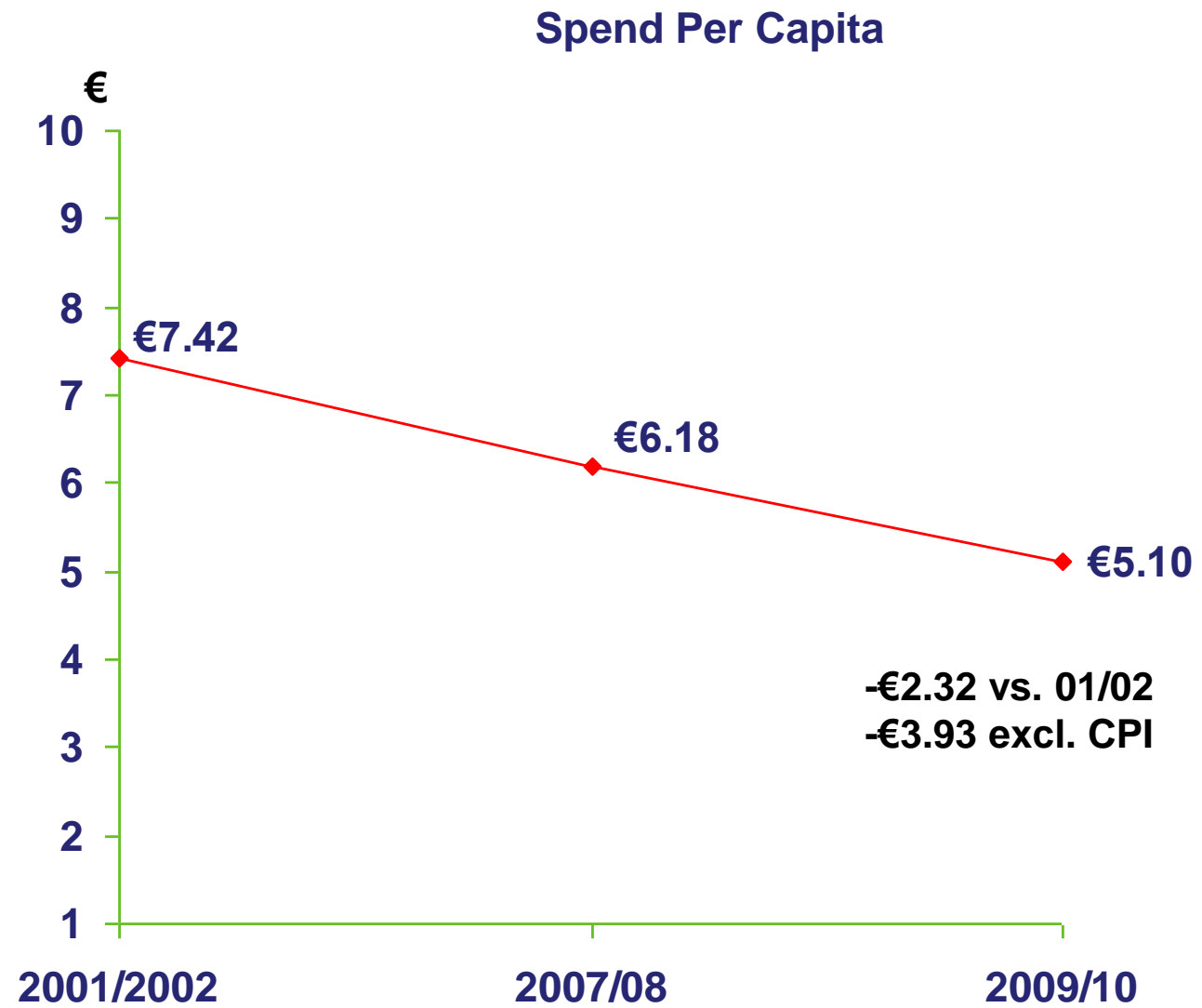
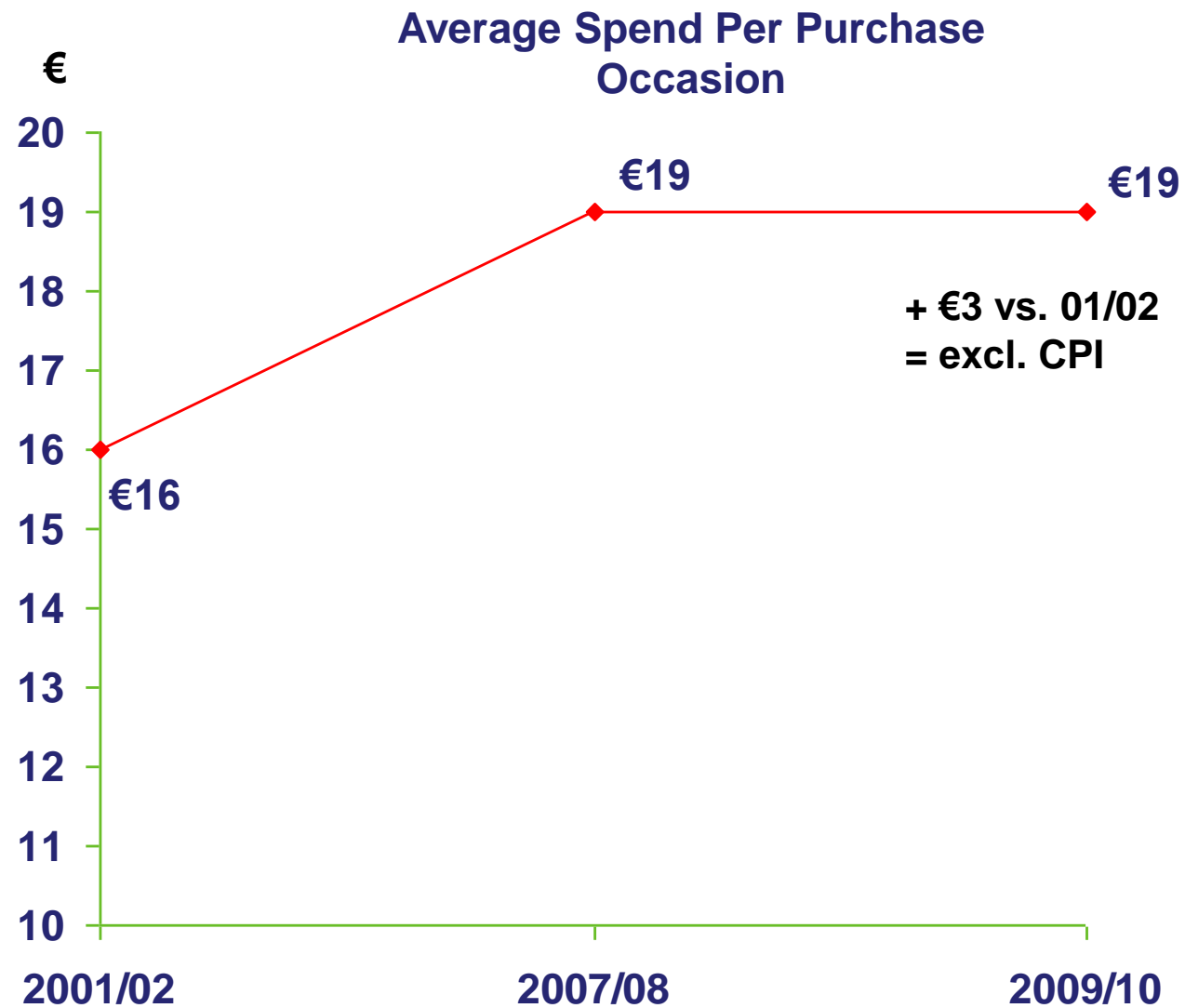
The incidence of purchase of Indoor Potted Plants is highest among those over 55 years.

# Purchase of Indoor Potted Plants – Summary



Purchasing of indoor plants has declined by 30% since 01/02, although the market value has only fallen by 18% – suggesting that fall in value has been driven by reduced purchasing activity.

# Purchase of Indoor Potted Plants – Summary



The average spend per purchase occasion for Indoor Potted Plants has remained steady since 07/08, and is actually up by €3 over the longer term.

Per capita occasions down 42%



# Number Of Purchase Occasions – for Indoor Potted Plants

2001/2002

2002/2003

2005/2006

2007/2008

2009/2010

1.34m

1.12m

1.48m

1.1m

0.94m

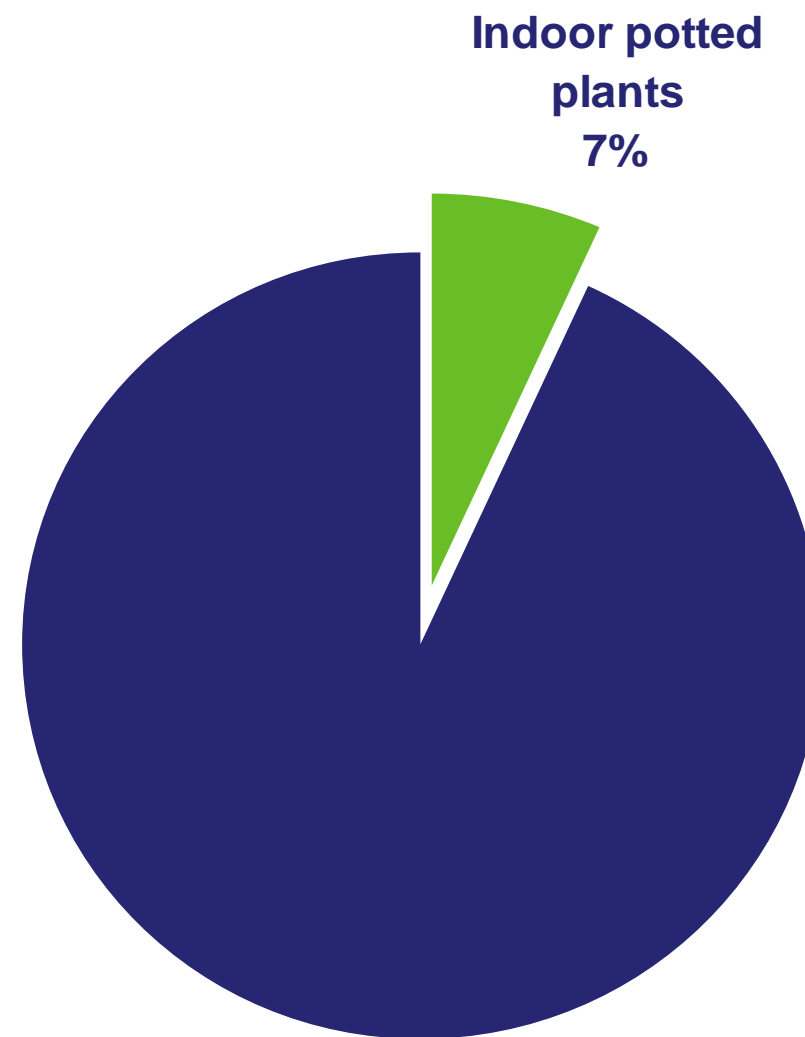
% growth  
Vs. 01/02

-30%

Purchase occasions have contracted since 01/02 by 30%, despite a 19% rise in the population. However, activity in this category has not fallen as dramatically in the past two years as in the outdoor and flowering plants category.

# Purchase Occasions for Indoor Potted Plants as a Proportion of Total Amenity Market\*

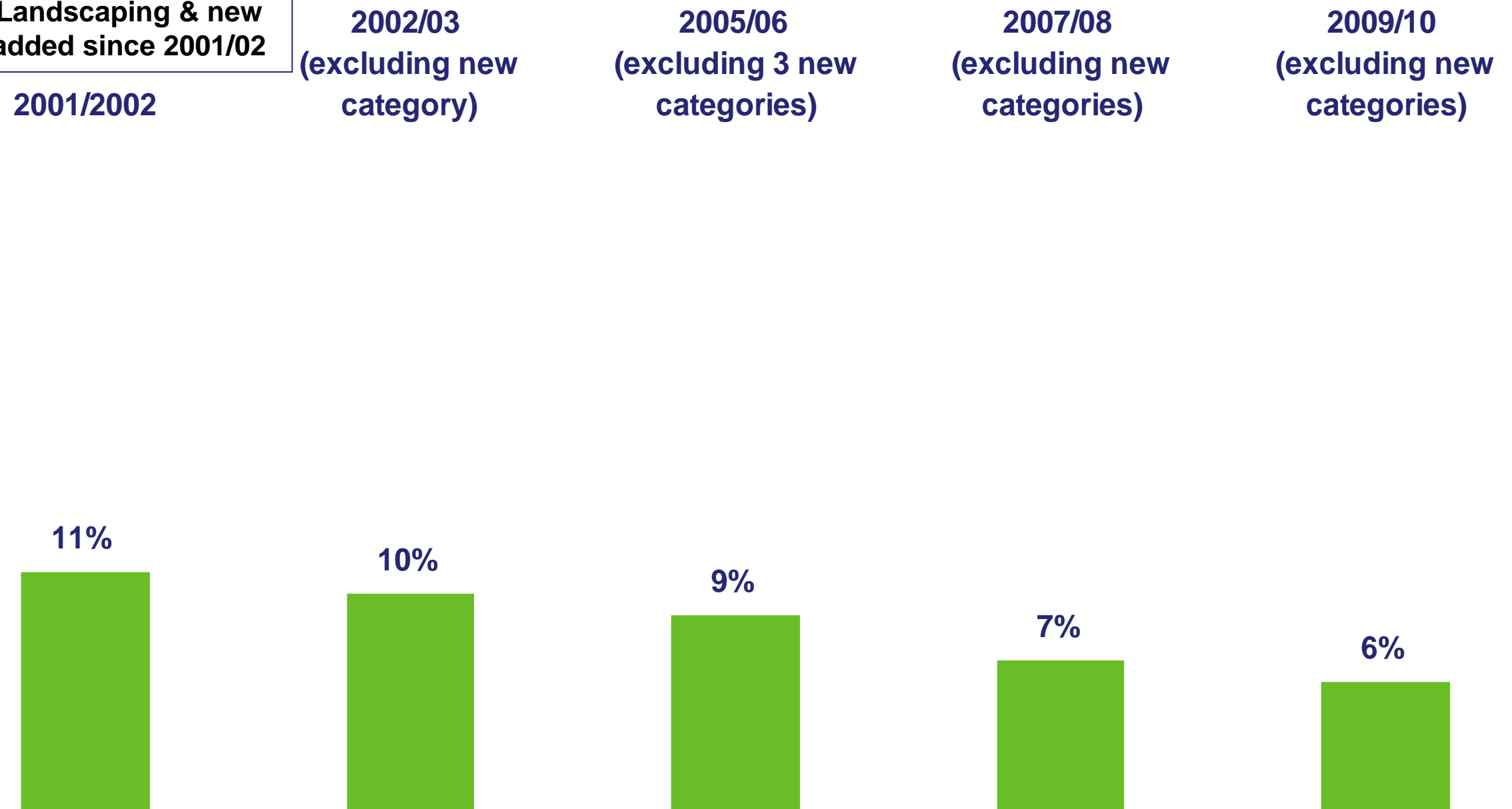
\* Excludes landscaping



**Indoor potted plants account for 7% of all purchasing occasions in the amenity market.**

# Purchase Occasion Share Trend: Indoor Potted Plants as a Proportion of Total Amenity Sector\*

\* Excludes Landscaping & new categories added since 2001/02



Indoor potted plants appear to be losing saliency in the longer term.

# Value Of Purchases – Indoor Potted Plants

2001/2002

2002/2003

2005/2006

2007/2008

2009/2010

€22m

€17m

€27m

€21m

€18m

-18%

-33%

% growth vs. 01/02

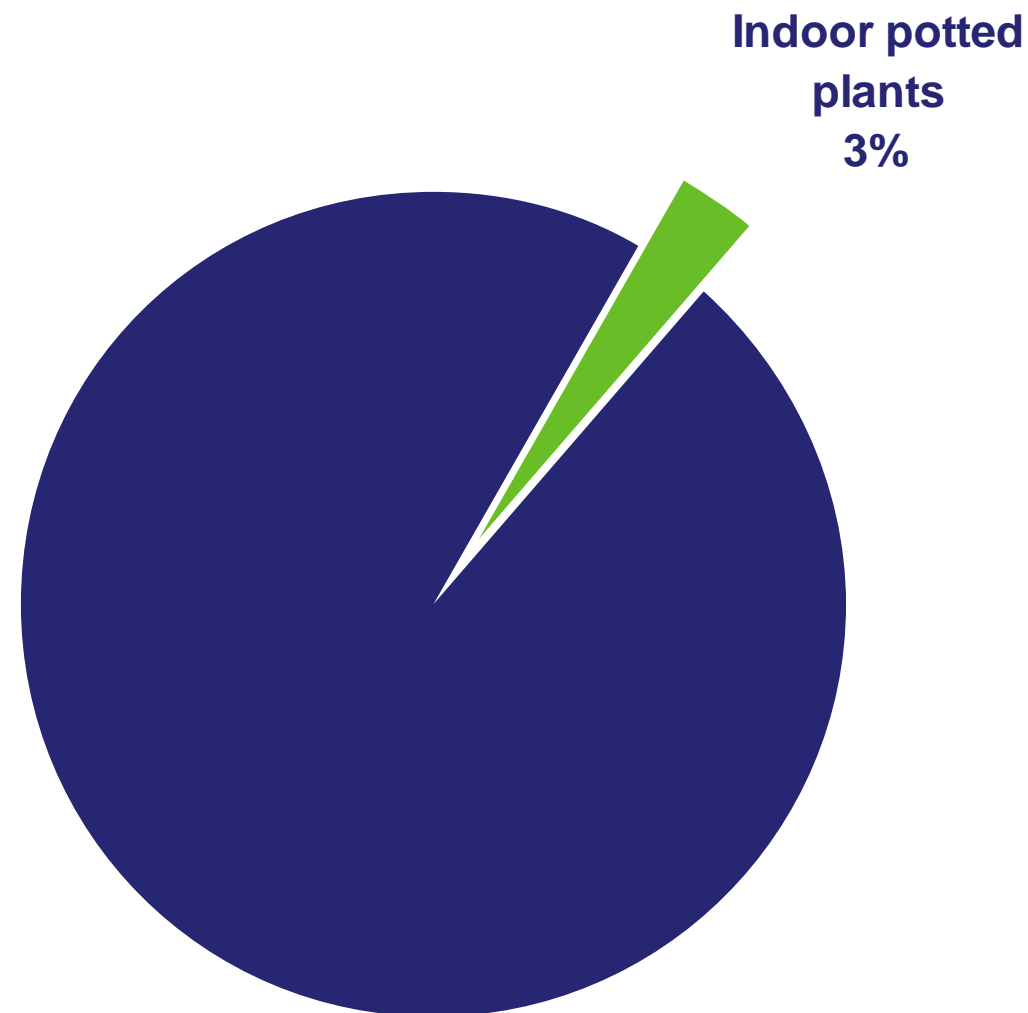
% underlying growth

Spend on indoor potted plants has fallen by 18% in eight years. The market is now worth €18m – in real terms the decline is about 33%.

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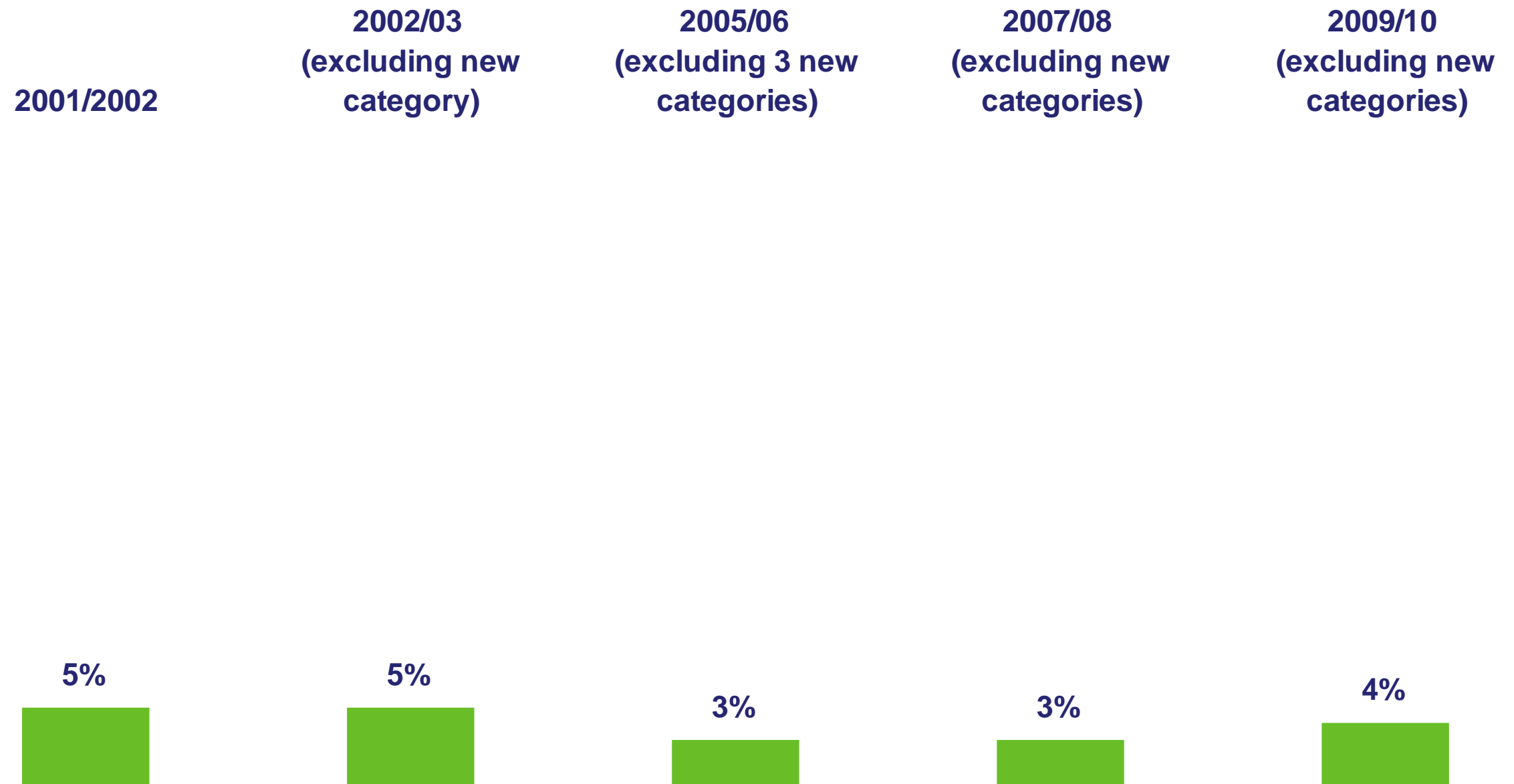
# Value of Indoor Potted Plants as a Proportion of Total Amenity Market\*



3% of all amenity spend is accounted for by indoor potted plants.

# Value Share Trend: Indoor Potted Plants as a Proportion of Total Amenity Sector\*

\* Excludes Landscaping



Share of spend is marginally higher than in the last two surveys, as spend per purchase occasion has actually held steady.

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# Average Spend Per Purchase Occasion – Indoor Potted Plants

2001/2002

2002/2003

2005/2006

2007/2008

2009/2010

€16

€15

€18

€19

€19

Change (€)

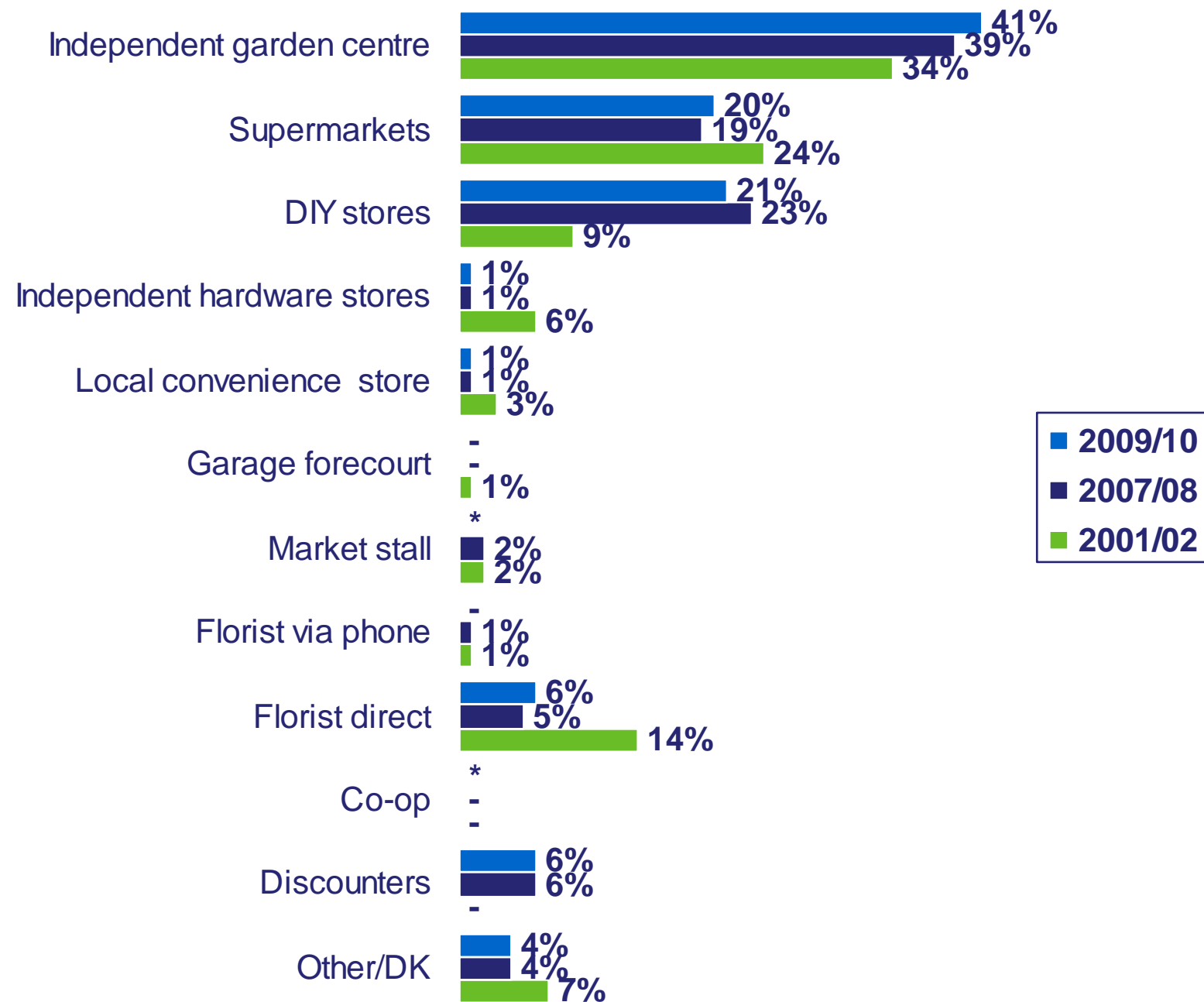
+€3

Underlying change (€)

=

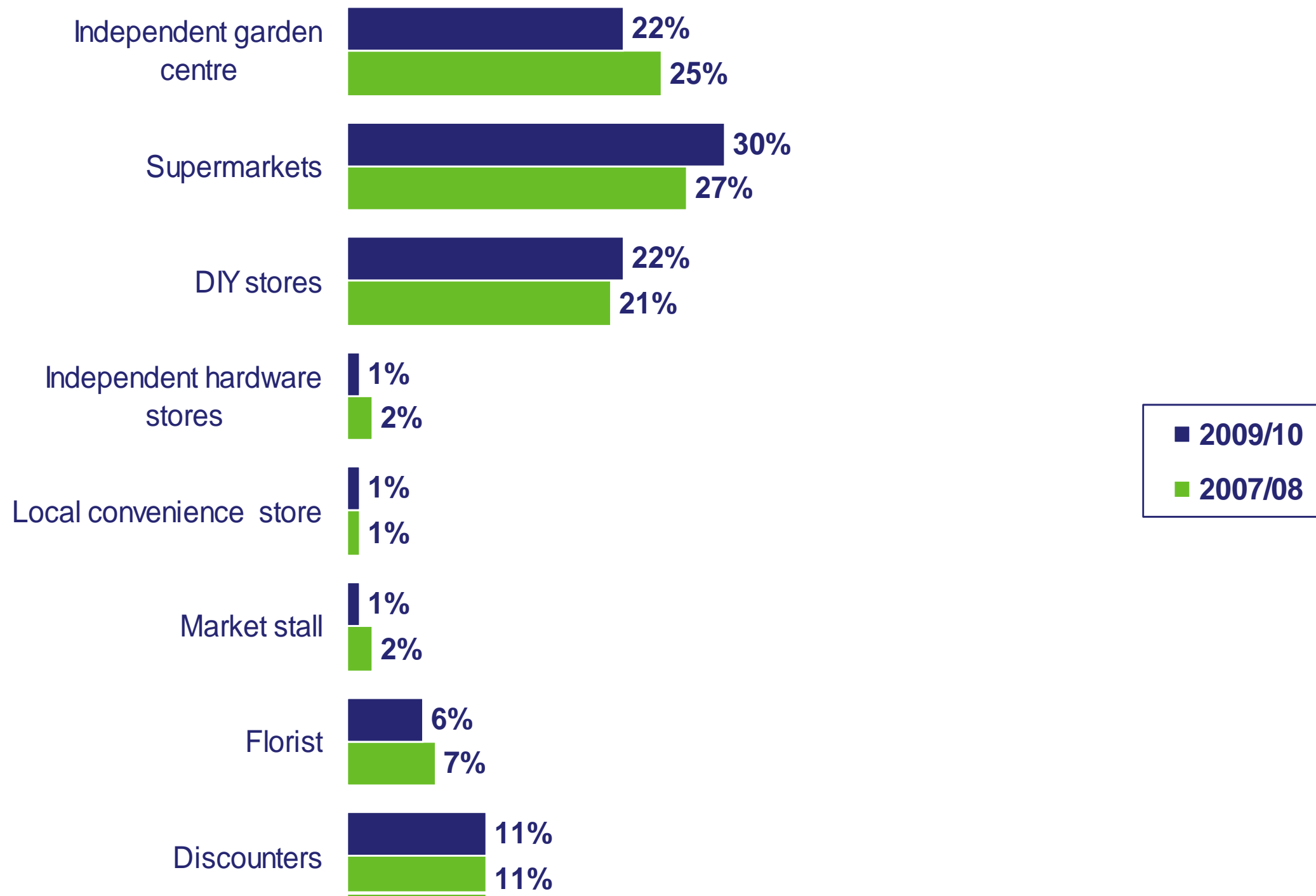
Spend per purchase occasion has increased by €3 since 01/02. In real terms, spend per occasion has held steady – possibly due to more sophisticated varieties of potted plants now available.

# Value Market Share for Indoor Potted Plants by Channel



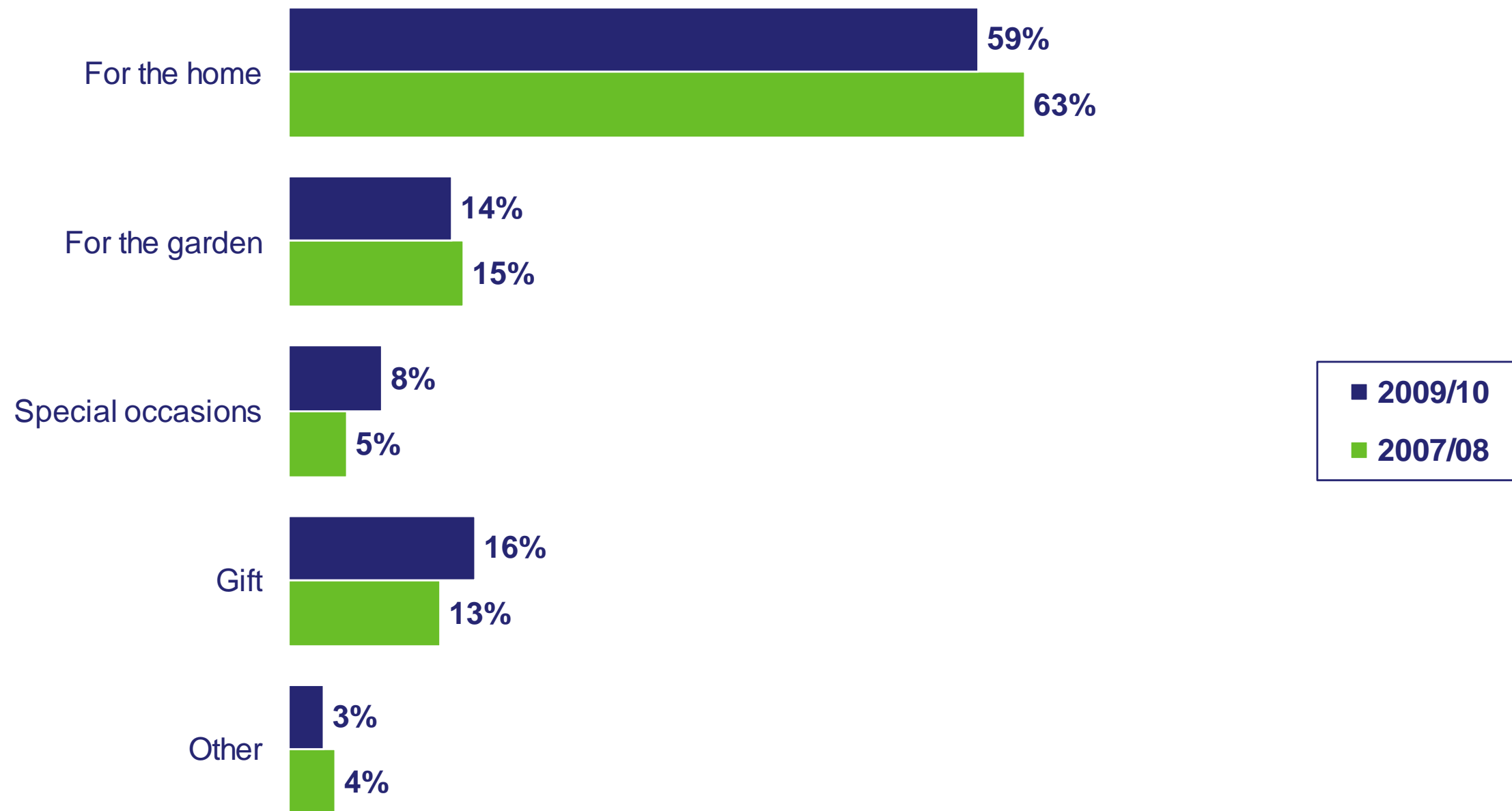
**41% of market value is through independent garden centres; whose offer in value terms appears to be strengthening.**

# Channels for Indoor Potted Plants 2009/2010 (Purchase Occasion Based)



Based on purchase occasions; supermarkets remain the most favoured channel to purchase indoor potted plants, while independent garden centres have lost some ground

# Motivation for Purchase: Indoor Potted Plants 2009/2010 (Purchase Occasion Based)



**A quarter of all purchases of indoor potted plants are as gifts or special occasions – up from 18% two years ago, but the majority are for the home.**

# Indoor Potted Plants – Summary

- ✓ The value of the indoor potted plants market has fallen by 18% since 2001/02. When taking inflationary increases into account, the market has in fact, contracted by 34%.
- ✓ Since 2001/2002, purchasing occasions have declined from 1.34m to 0.94m, down 43% in eight years.
- ✓ Average spend per purchase rose from €16 to €19 over this period, which helped sustain the value of this category. Interestingly, the independent garden centre's share of this market had increased marginally. Per Capita Spend, however, dropped by more than €2.

# Fresh Cut Flowers

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# Fresh Cut Flowers Category

✓ Definition includes:

- Fresh cut flowers
- Wreaths
- Foliage

# Average Past Week Incidence of Buying Fresh Cut Flowers, Foliage And Wreaths April 2009-April 2010 – Quarterly Trend

	Full Year 2005/2006	Full Year 2007/2008	Full Year 2009/1010	Apr-June 2009	Jul-Sept 2009	Oct-Dec 2009	Jan-Apr 2010
	%	%	%	%	%	%	%
Fresh cut flowers	16	14	13	15	12	11	14
Foliage	2	3	3	4	2	2	2
Wreaths	1	1	1	1	1	1	1

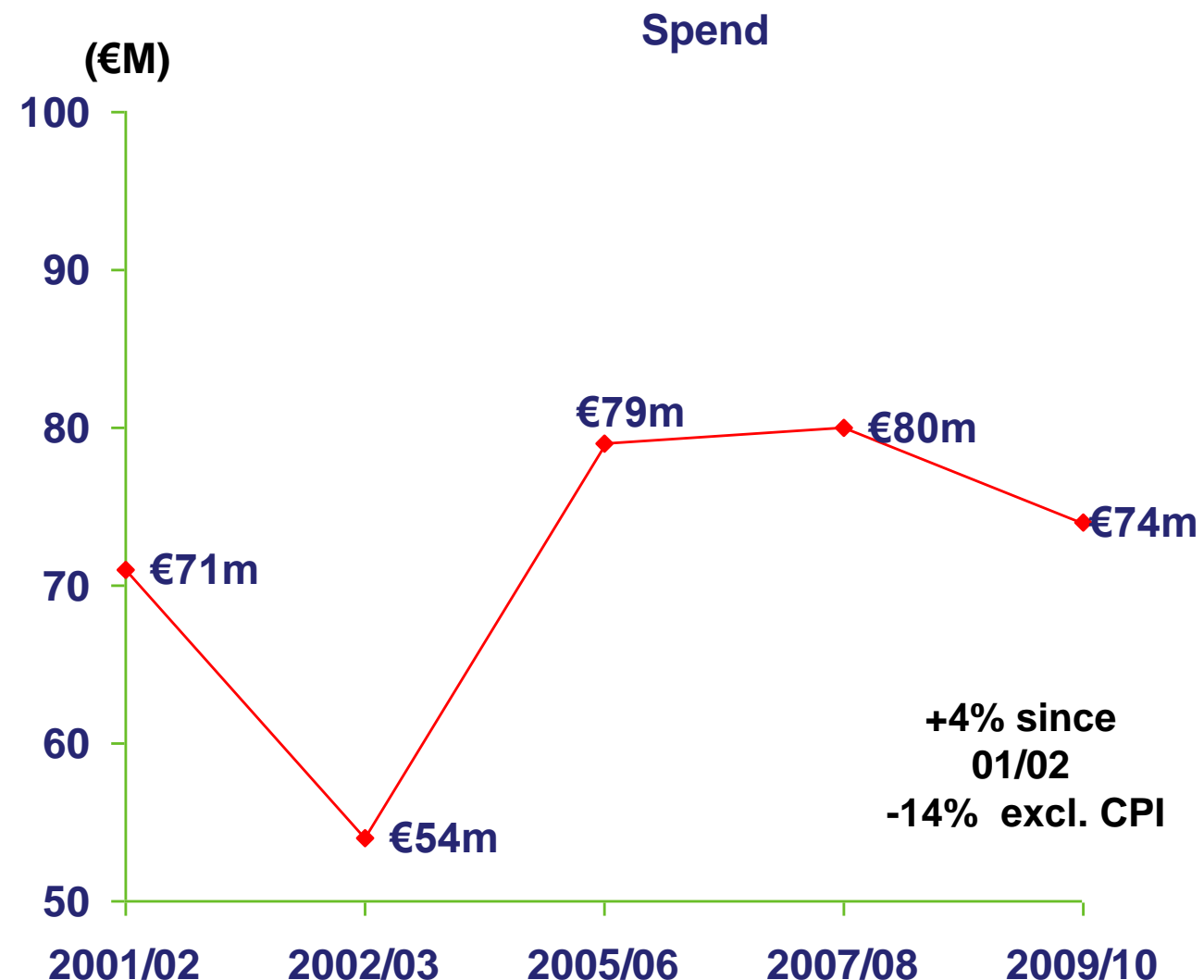
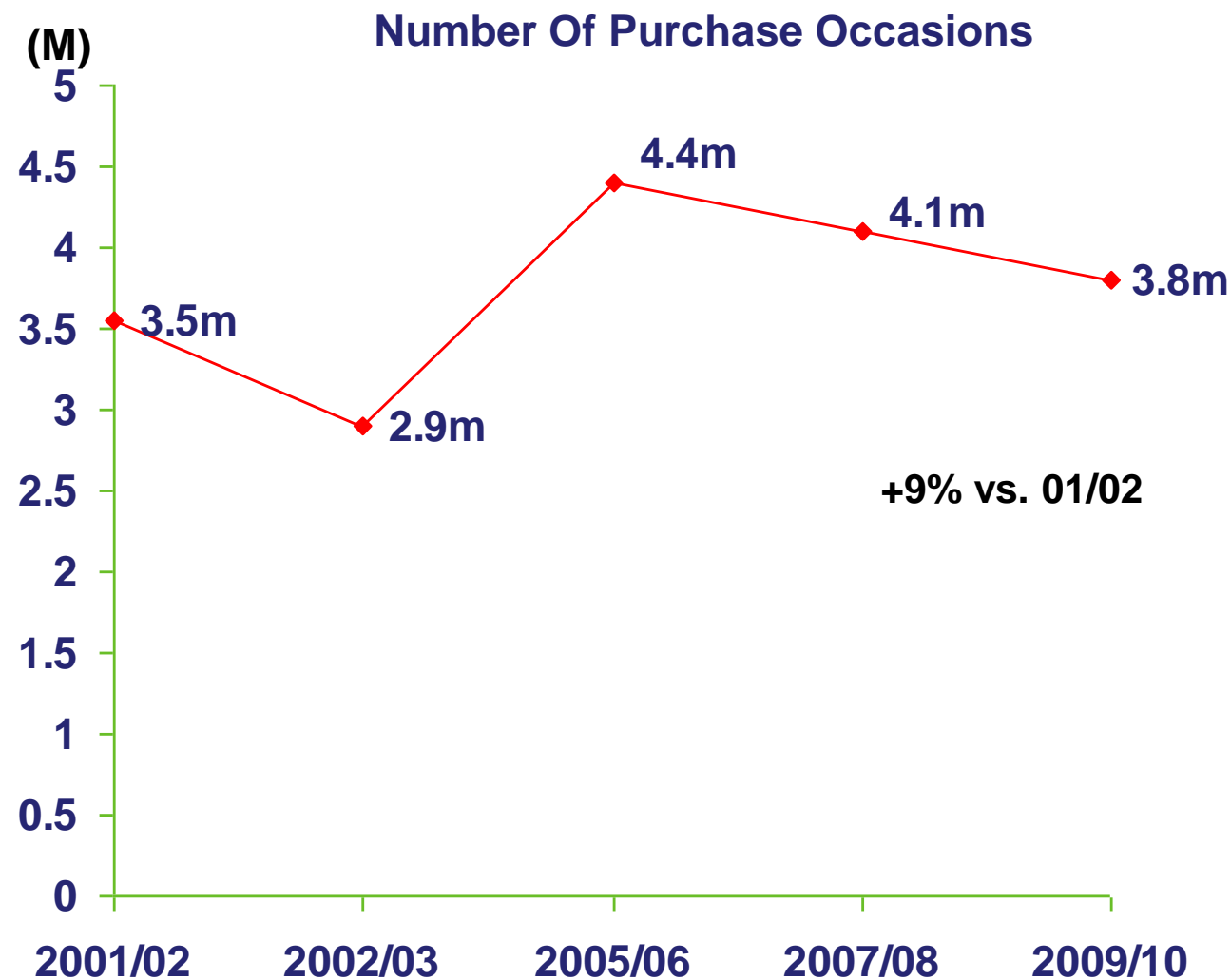
The incidence of buying fresh cut flowers has declined from 16% in 2005 to 13% in 2009.

# Incidence of Buying Fresh Cut Flowers, Foliage and Wreaths by Demographics

	Total	Gender		Age				Social Class			Region			
		Male	Female	15-24	25-34	35-54	55+	ABC 1	C2DE	F	Dub-lin	RoL	Mun-ster	Conn/Ulster
	%	%	%	%	%	%	%	%	%	%	%	%	%	%
Fresh cut flowers	13	8	17	6	11	15	15	15	12	8	14	13	12	10
Foliage	3	2	3	2	2	3	3	3	3	2	3	2	3	3
Wreaths	3	2	3	2	2	3	3	3	3	2	3	2	3	3

**17% of females buy fresh cut flowers compared to just 8% of males. The incidence of purchase is marginally higher among those aged over 35, and from middle class backgrounds.**

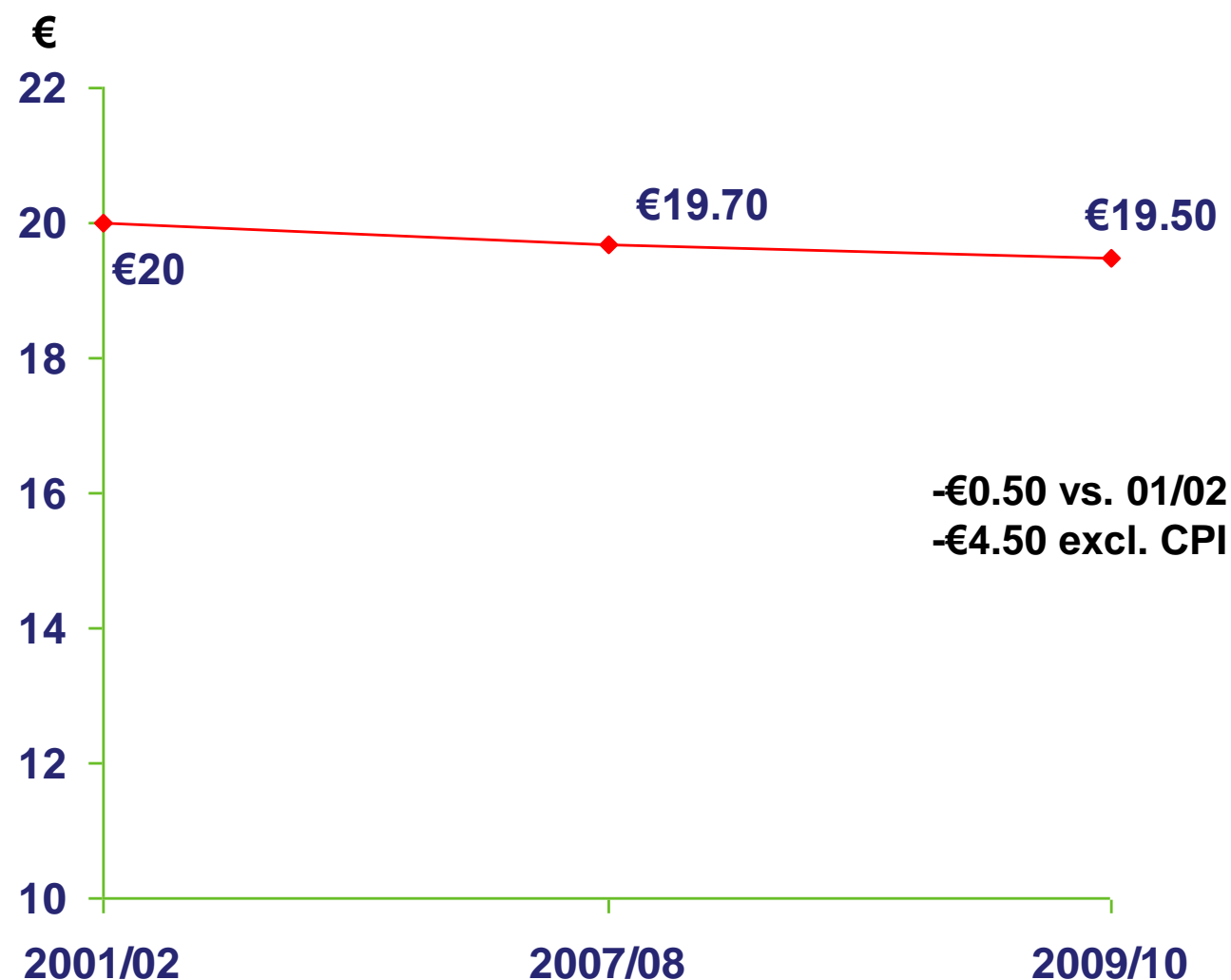
# Purchase of Fresh Cut Flowers and Wreaths – Summary



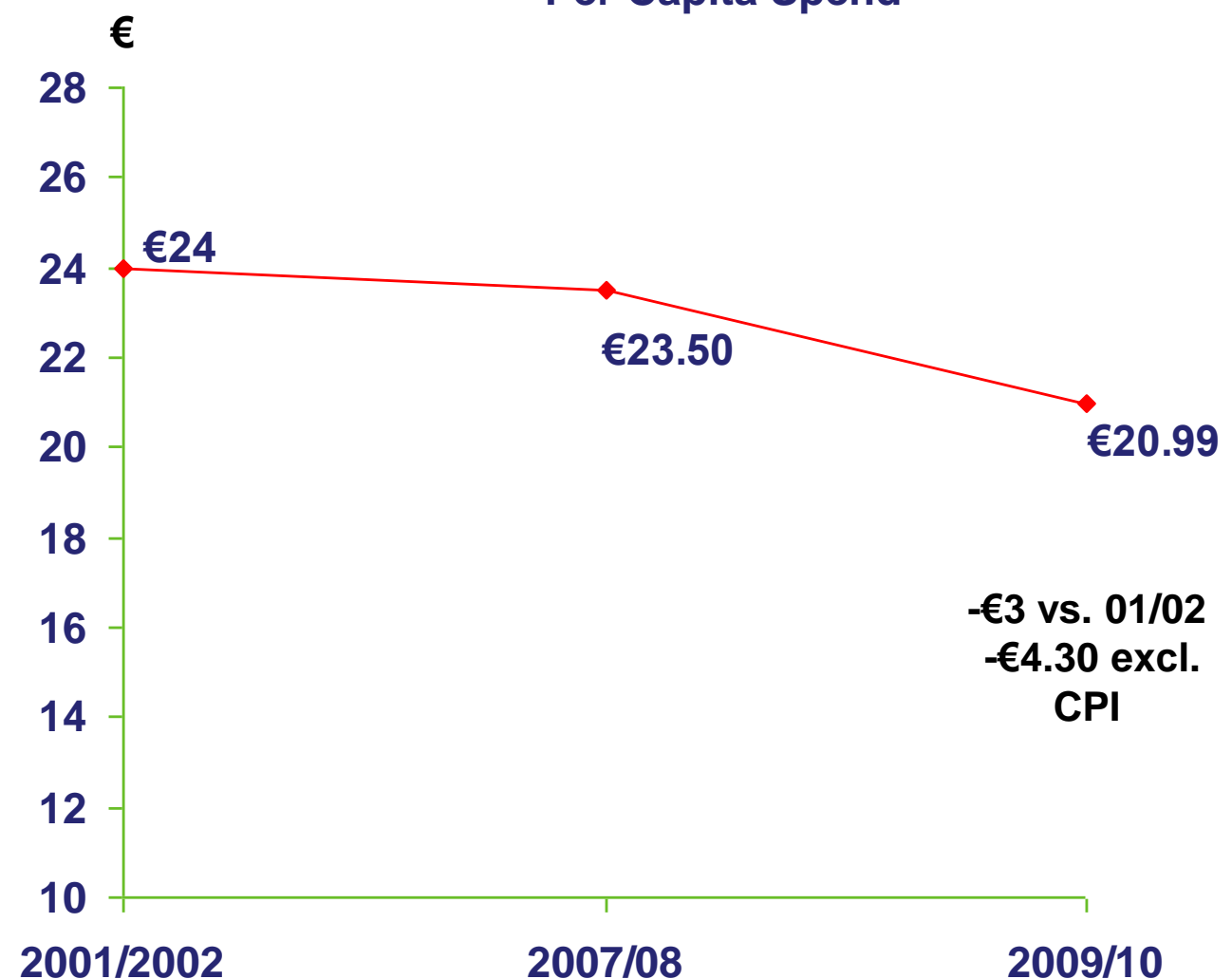
Purchasing of fresh cut flowers and wreaths has increased by 9% since 2001/02, though occasions are still down from the peak between 2005 and 2007. Spend has increased by a slower rate than occasions, at 4%.

# Purchase of Fresh Cut Flowers and Wreaths – Summary

Average Spend Per Purchase



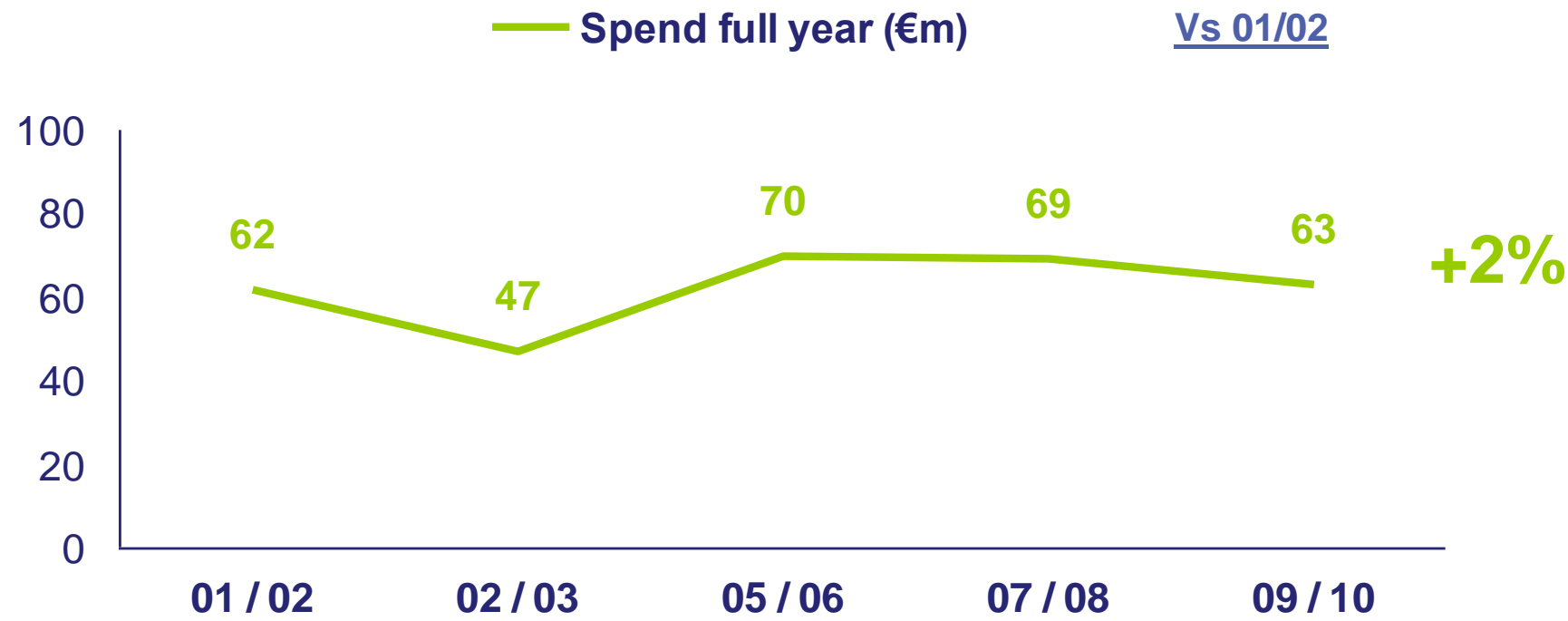
Per Capita Spend



Per capita occasions down 9%

Average spend per occasion has fallen by just 50c since 01/02; however, spend per head of population has contracted by 12.5% (-€3).

# Fresh Cut Flowers



## Product Summary

- Value of Fresh Cut Flowers market has grown from €62m to €63m since 2001.
- The number of purchasing occasions has also increased, though not at pace with the growth in population.
- Spend per purchase occasion has not changed over time, so it is occasions which are primarily driving the limited value growth.
- The continued growth in value and activity, where other categories are struggling, is due to discounters and supermarkets taking a significantly greater share in purchasing.

Occasions (m)	3.3	2.7	4.2	3.7	3.4	+4%
Spend per purchase occasion	€18.56	€17.27	€16.84	€18.60	€18.53	=
Spend per capita	€20.59	€15.58	€21.75	€20.31	€17.86	(-€2.73) -13%
Individual Population (15+)	2.963m	3.017m	3.218m	3.398m	3.526m	+19%



# Number of Purchase Occasions

## – Fresh Cut Flowers, Foliage and Wreaths

2001/2002

2002/2003

2005/2006

2007/2008

2009/2010

3.68m

3.12m

4.79m

4.7m

4.34m

% growth

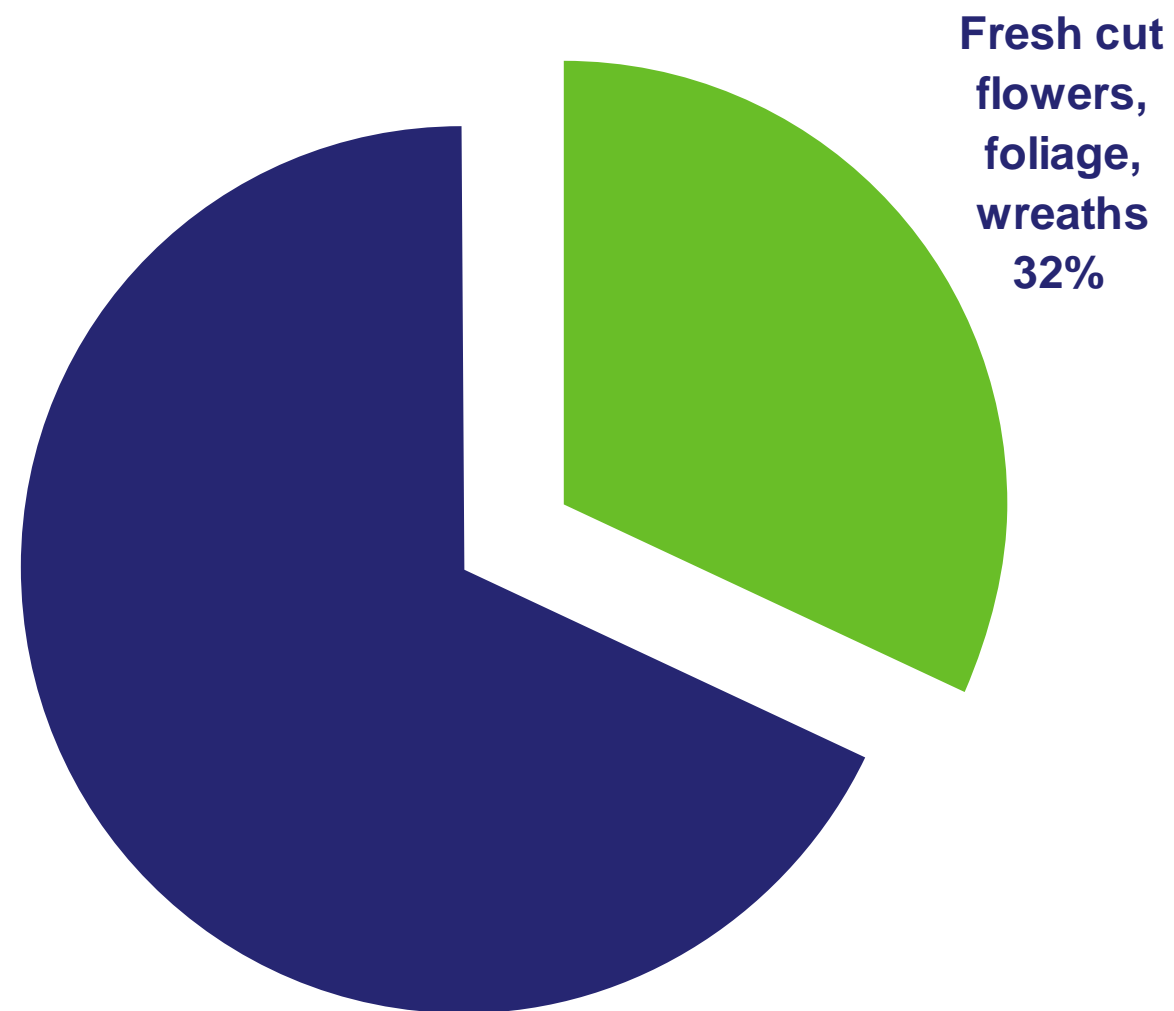
+18%

There were 4.34m purchasing occasions of fresh cut flowers, foliage and wreaths in 09/10. Excluding foliage, purchasing occasions are up 9% over this period.

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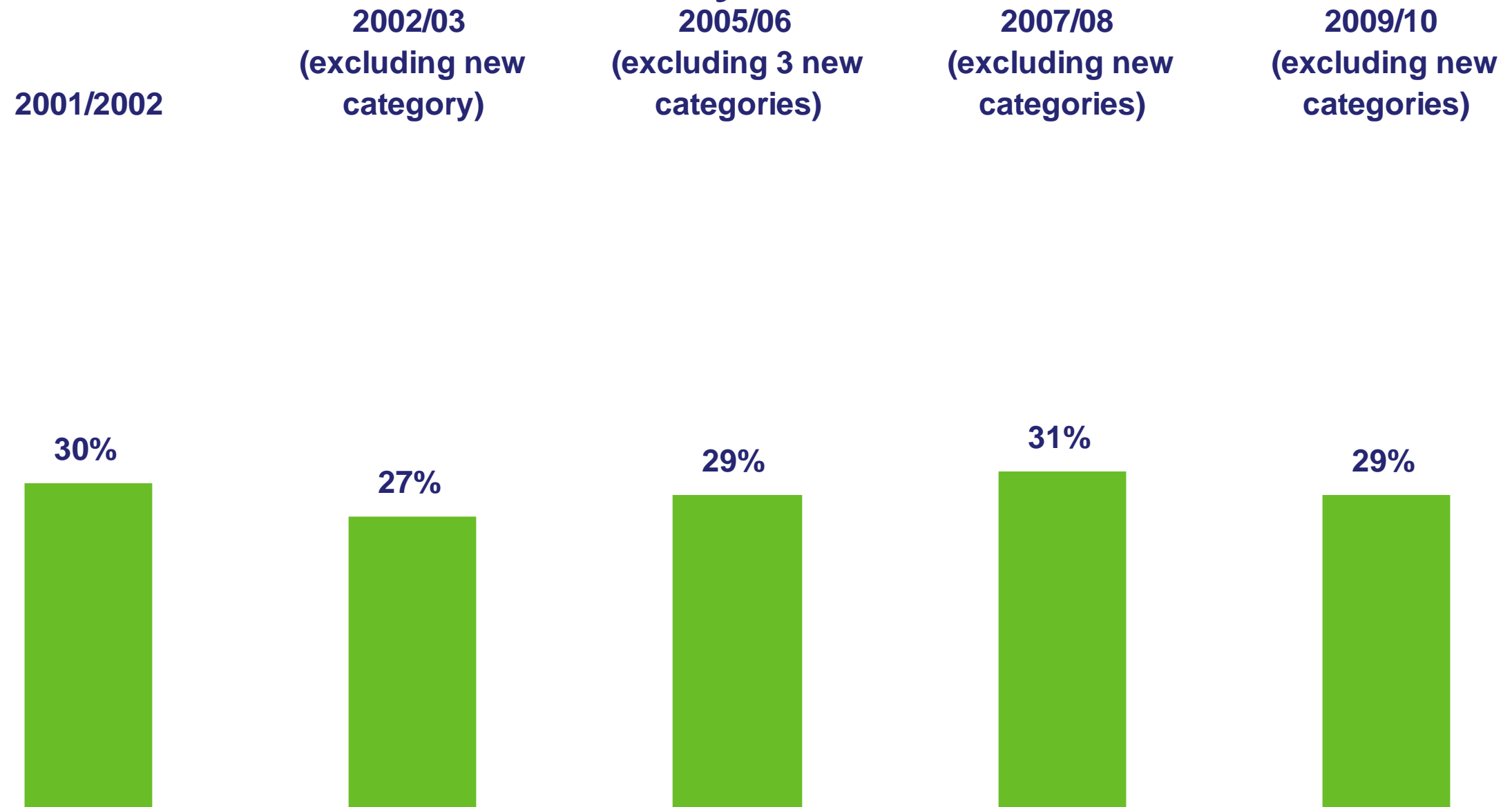
# Purchase Occasions for Fresh Cut Flowers, Foliage & Wreaths as a Proportion of Total Amenity Market\*



\* Excludes landscaping

**Fresh cut flowers, foliage and wreaths represent 32% of all purchasing occasions.**

# Purchase Occasions Share Trend: Fresh Cut Flowers, Foliage & Wreaths as a Proportion of Total Amenity Sector\*



3 in 10 amenity purchases are fresh cut flowers, foliage and wreaths.

\* Excludes landscaping & new categories added since 2001/02

# Value Of Purchases – Fresh Cut Flowers, Foliage and Wreaths

2001/2002

2002/2003

2005/2006

2007/2008

2009/2010

€76m

€58m

€88m

€97m

€91m

% growth

+20%

% underlying growth

-2%

Fresh cut flowers, foliage and wreaths are valued at €91m. This market has held its value since measurement in 2001/02, even taking inflationary changes into account.

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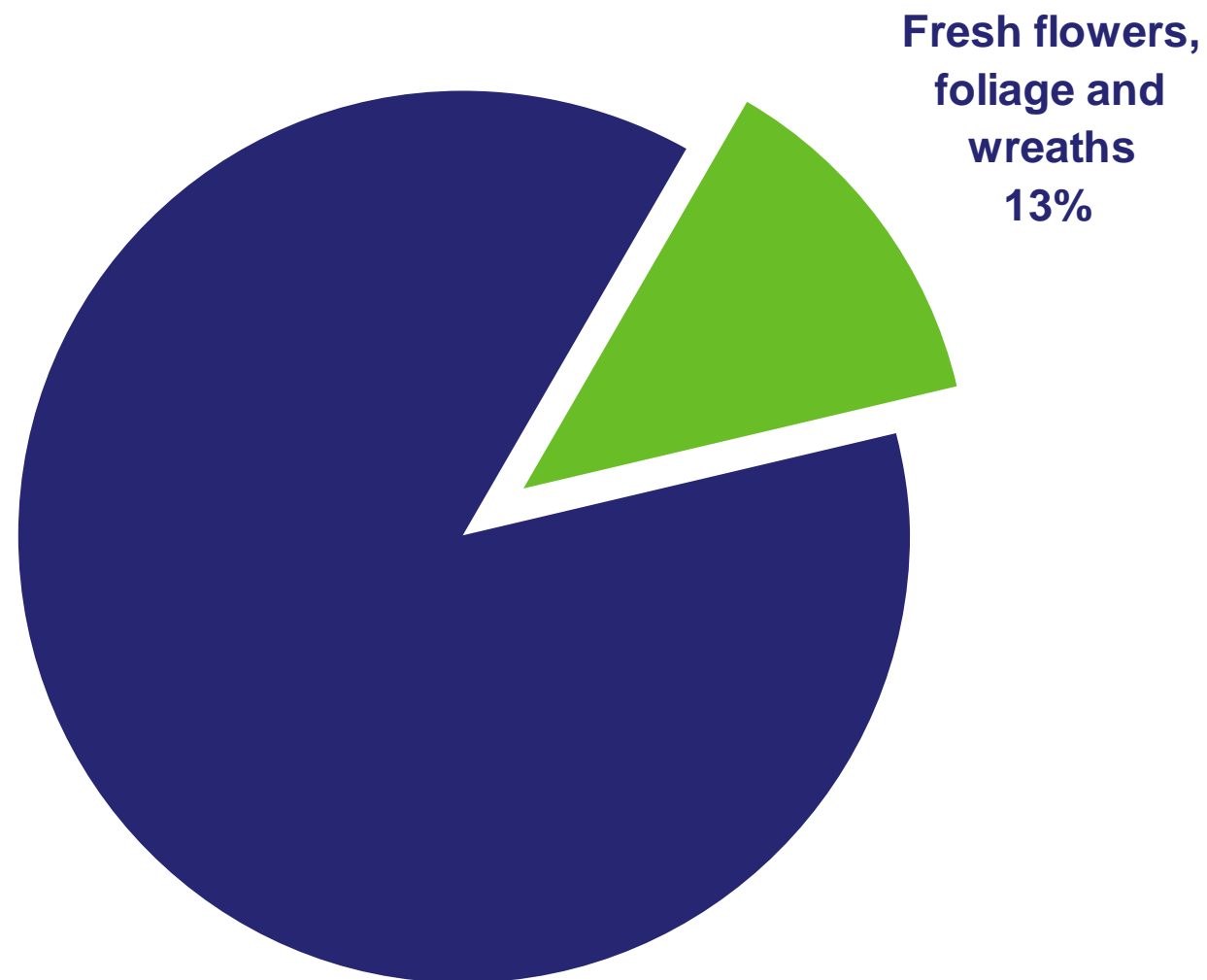
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# Breakdown of Value of Fresh Cut Flowers and Wreaths

	2001/2002	2002/2003	2005/2006	2007/2008	2009/2010	% growth	% underlying growth
	€m	€m	€m	€m	€m		
Fresh cut flowers	62	47	70	69	63	+2	-17
Wreaths	9	7	9	11	11	+22	=

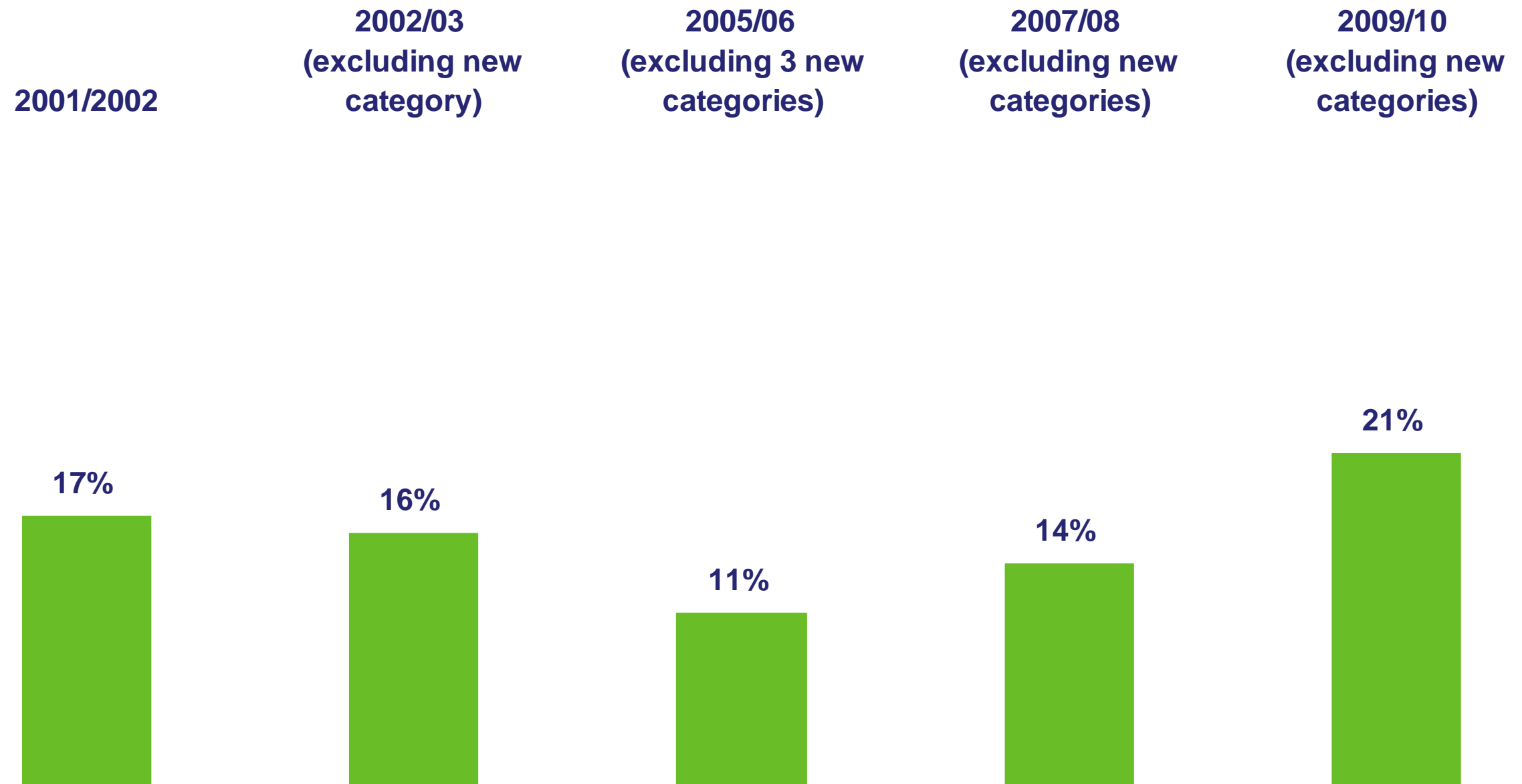
The fresh cut flowers market is worth €63m, on a par with the value in 2001/02, but down 17% in real terms. Wreaths are worth €11m – steady in real terms.

# Value of Fresh Cut Flowers, Foliage & Wreaths as a Proportion of Total Amenity Market



Fresh cut flowers, foliage and wreaths account for 13% of all amenity spend.

# Value Share Trend: Fresh Cut Flowers, Foliage & Wreaths as a Proportion of Total Amenity Sector\*



**This category has witnessed a growth in its market share over the longer and shorter term.**

\*Excludes landscaping



# Average Spend Per Purchase Occasion – Fresh Cut Flowers, Foliage and Wreaths

2001/2002

2002/2003

2005/2006

2007/2008

2009/2010

€20

€19

€18

€21

€21

Change (€) vs. 01/02

+€1

Underlying change (€)

-€3.50

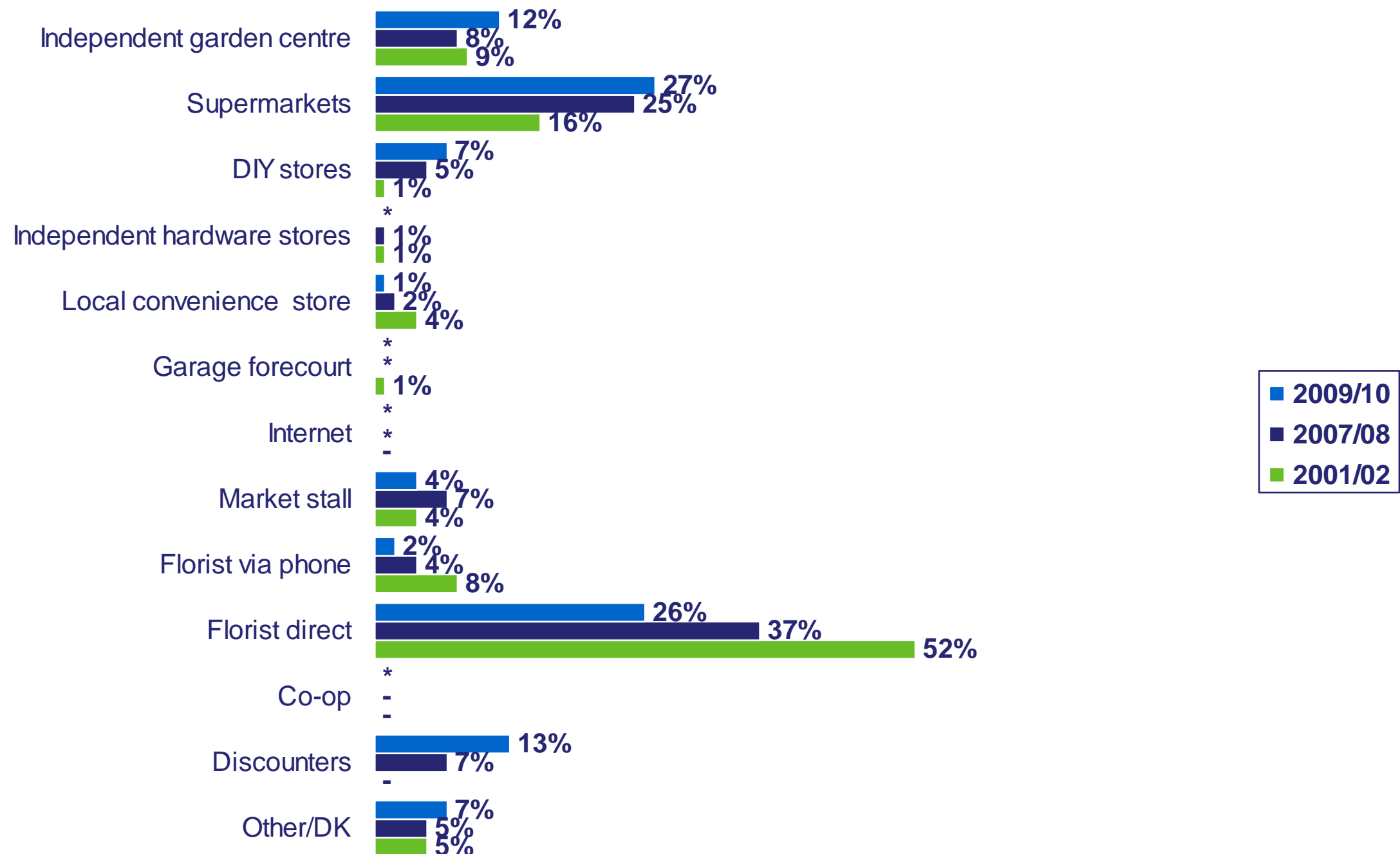
Average spend per purchase occasion has increased 5% to €21 since 2001/02, though in real terms, spend per occasion has dropped by €3.50.

# Average Spend Per Purchase Occasion for Fresh Cut Flowers and Wreaths

	2005/2006	2007/2008	2009/2010
✓ Fresh Cut Flowers	€17	€19	€18
✓ Wreaths	€30	€31	€35

**Spend per purchase occasion on fresh cut flowers is €18 – showing little change compared to four years ago.**

# Value Market Share For Fresh Cut Flowers And Wreaths by Channel



**Florists are under significant pressure, as further market share is won by discounters. 50% of all spend on fresh cut flowers is channelled through supermarkets and discounters, compared with just 36% through florists.**

# Channels For Fresh Cut Flowers & Wreaths: 2009/2010 (Purchase Occasion Based)

	Fresh Cut Flowers		Wreaths	
	09/10	07/08	09/10	07/08
	%	%	%	%
Independent garden centre	2	3	7	12
Supermarket	39	43	12	11
DIY stores	1	1	5	7
Local convenience store	1	2	3	3
Garage forecourt	1	1	-	-
Market stalls	3	3	-	5
Florist via phone	1	1	3	9
Florist direct	22	26	65	42
Discounters	20	17	2	-
Other Misc. Supermarkets	3	5	-	-
Others	7	4	3	12

**62% of all purchases of fresh cut flowers are made through supermarkets/discounters.**

# Motivation For Purchase – Fresh Cut Flowers & Wreaths: 2009/2010

## (Purchase Occasion Based)

	Fresh Cut Flowers		Wreaths	
	09/10	07/08	09/10	07/08
	%	%	%	%
For the home	40	44	7	15
For the garden	1	1	1	9
Special occasion (birthday, Valentines etc.)	23	20	80	63
Gift	34	32	7	12
Other	2	3	5	1

**57% of all purchases of fresh cut flowers are made as a gift for someone or for a special occasion, while 4 in 10 purchases are for the home.**

# Fresh Cut Flowers and Wreaths - Summary

- ✓ Fresh cut flowers, wreaths and foliage were worth €91m – the majority of which was comprised by fresh cut flowers (€63m). While in absolute terms, the market had grown by 20% since 2001/02, in real terms, the value of these three products had remained static.
- ✓ The number of purchasing occasions of products in this category rose from 3.68m to 4.34m in this period - an increase of 18% . Purchasing occasions of fresh cut flowers increased by just 4%; though this is outstripping value growth, suggesting reasonable activity levels within this product area.
- ✓ The average spend per purchase occasion has remained at €18 for fresh cut flowers (though in real terms, this represents a decline in spend). This reflects the increased share taken by supermarkets and discounters in this market.

# Garden Products

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# Garden Products Category

✓ Definition includes:

- Garden treatment (e.g. feed, fertiliser and pesticides)
- Peat/bark/soil treatment (e.g. wood chippings/bag of peat/manure)
- Garden accessories (e.g. sculptures, fountains, pots, containers)
- Paving/decorative stones
- Decking
- BBQ equipment
- Garden furniture (e.g. tables, chairs, outdoor heaters)
- Gardening tools/equipment (e.g. spades, forks, hoes, strimmers, lawn mowers)
- Garden structures (incl. Sheds, glass houses, lean-to's, pergolas, tunnels, cloches)
- Garden trellising, fences
- Other hard landscaping products (sleepers, bricks etc.) NOTE: this is a new category added in 2007].

# Average Past Week Incidence of Buying Garden Products April 2009-April 2010: Quarterly Trend

	Full Year 2005/2006	Full Year 2007/2008	Full Year 2009/2010	Apr-Jun 2009	Jul-Sept 2009	Oct-Dec 2009	Jan-Apr 2010
	%	%	%	%	%	%	%
Garden treatment	7	5	5	11	6	2	3
Peat/bark/soil treatment	6	5	4	8	3	3	3
Garden accessories	4	2	2	4	2	2	2
Paving/decorative stones	2	2	1	1	1	1	1
Decking	1	*	*	*	1	*	*
BBQ equipment	2	1	2	4	2	*	*
Garden furniture	2	2	1	2	2	1	1
Gardening tools/equip.	5	3	3	4	2	2	2
Gardening structures	1	1	*	1	*	*	*
Garden trellising/fences	1	1	*	1	*	*	*
Other hard landscaping products	n/a	1	1	1	1	1	*

**Across the board – the incidence of buying of most garden products contracted slightly.**

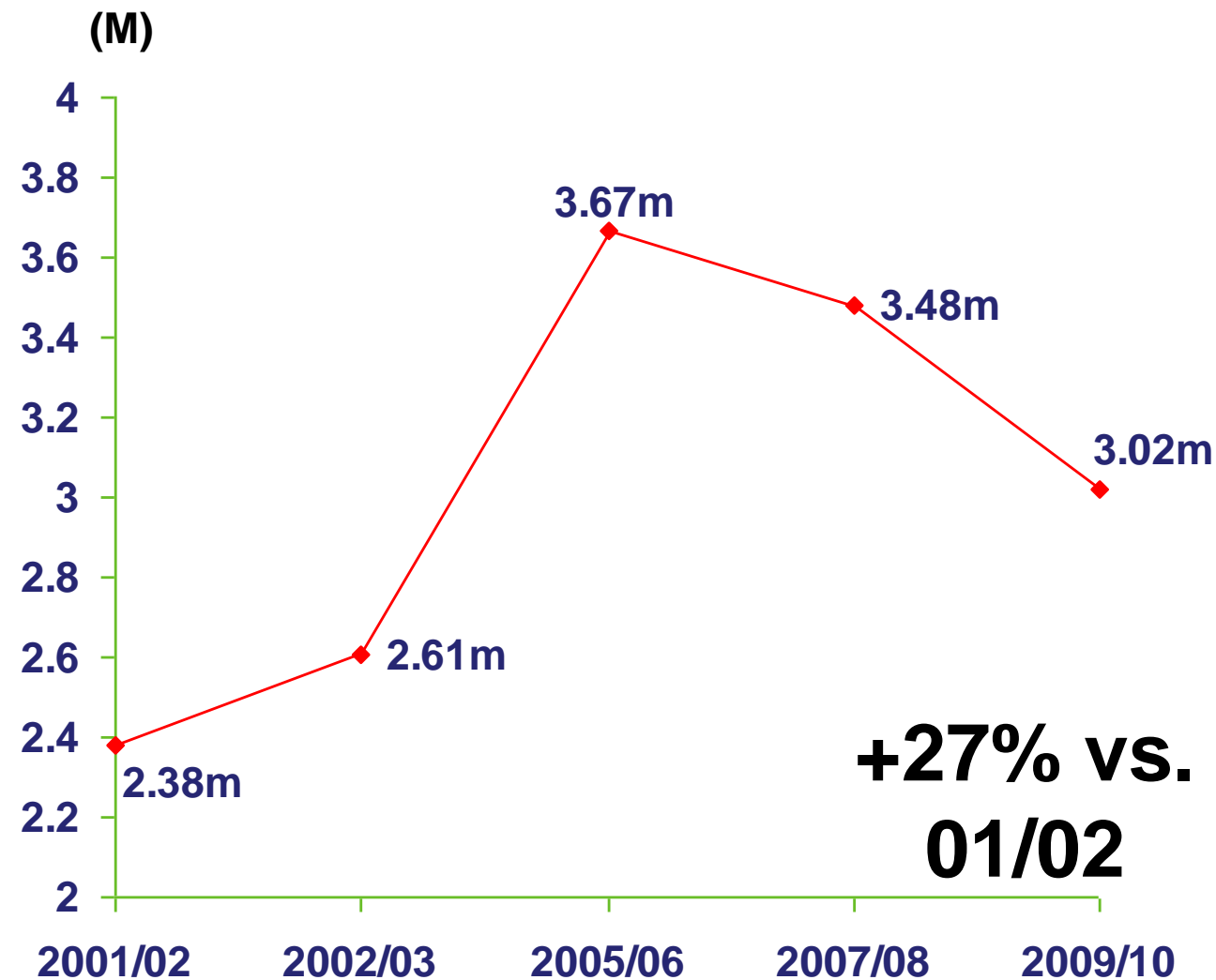
# Incidence of Buying Garden Products by Demographics

	Total	Gender		Age				Social Class			Region			
		Male	Fe- male	15- 24	25- 34	35- 54	55+	ABC 1	C2D E	F	Dub- lin	RoL	Mun- ster	Conn/ Ulster
		%	%	%	%	%	%	%	%	%	%	%	%	%
Garden treatment	5	5	6	3	4	6	7	6	5	6	5	6	5	5
Peat/bark/soil treat.	4	4	4	2	3	5	6	4	4	4	3	5	4	4
Garden accessories	2	2	2	2	2	3	2	2	2	1	2	2	2	2
Paving/decorative stones	1	1	1	*	1	1	1	1	1	1	1	1	1	1
Decking	*	1	*	*	1	*	*	*	1	*	*	1	*	*
BBQ equipment	2	2	2	3	3	1	1	2	2	1	3	2	2	2
Garden furniture	1	2	1	2	2	1	1	2	2	1	2	1	1	1
Gardening tools/equip.	3	3	2	3	3	3	2	3	3	2	2	3	3	3
Gardening structures	*	1	*	1	1	*	*	*	*	*	*	1	*	*
Garden trellising/fences	*	1	*	*	*	1	1	1	*	*	1	*	*	*
Other hard landscaping prod.	1	1	*	1	1	*	*	*	1	1	*	1	*	1

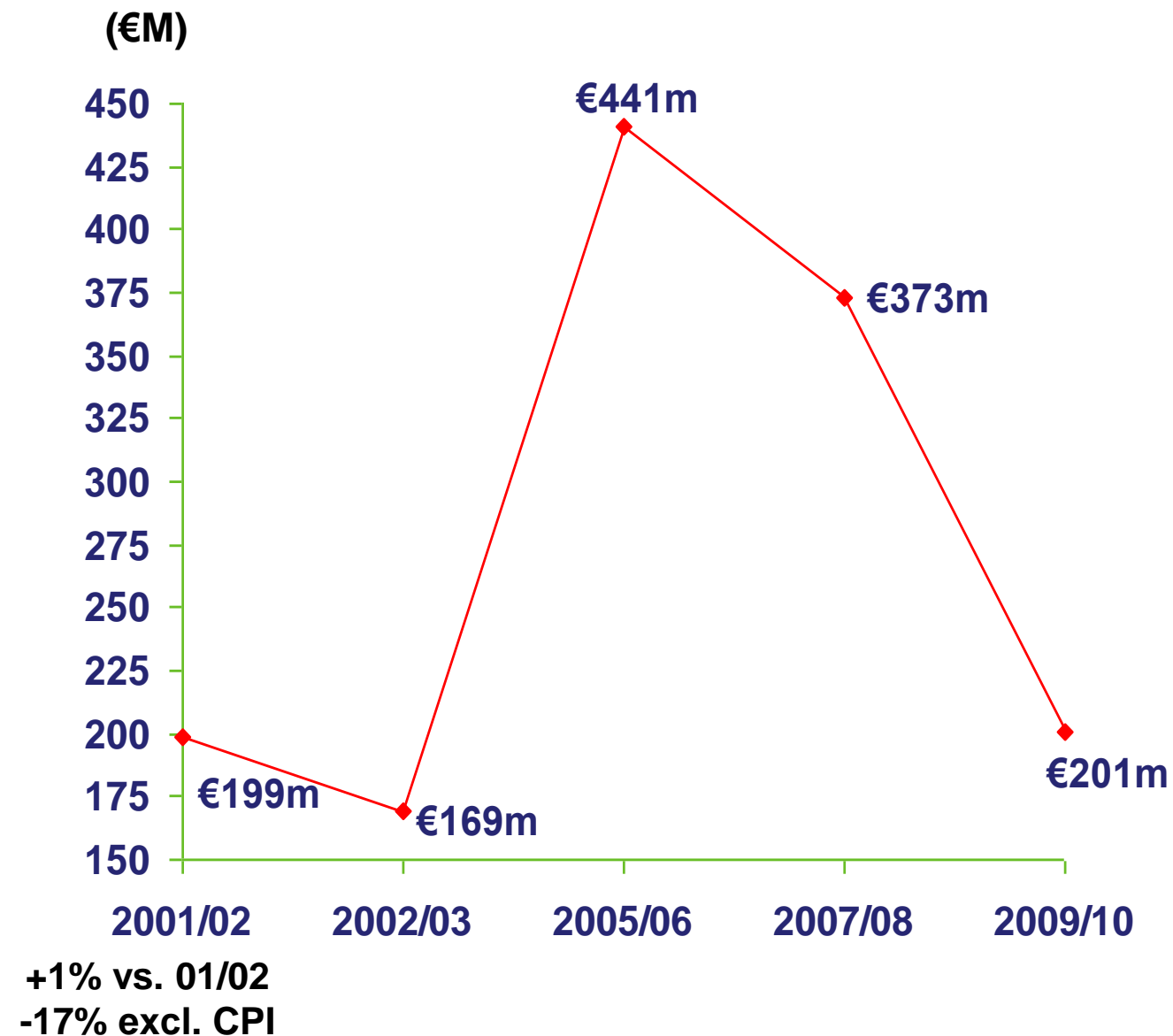
Incidence of purchase was widely spread, though purchase of garden treatment and peat/bark/soil was slightly higher among over 55's. Younger demographics were more likely to purchase BBQ equipment.

# Purchase Of Garden Products – Summary\*

Number Of Purchase Occasions\*



Spend\*

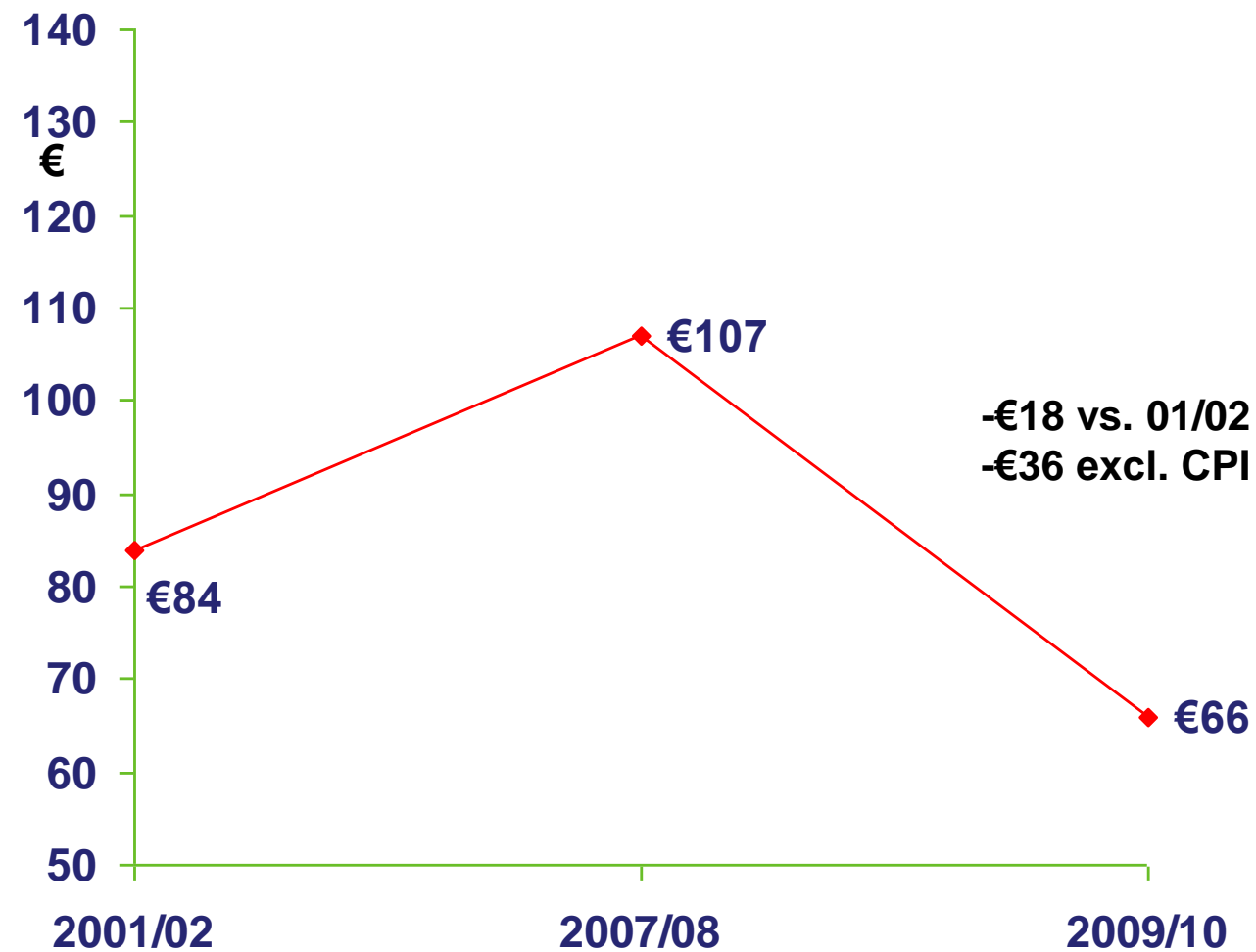


\*Comparable categories only

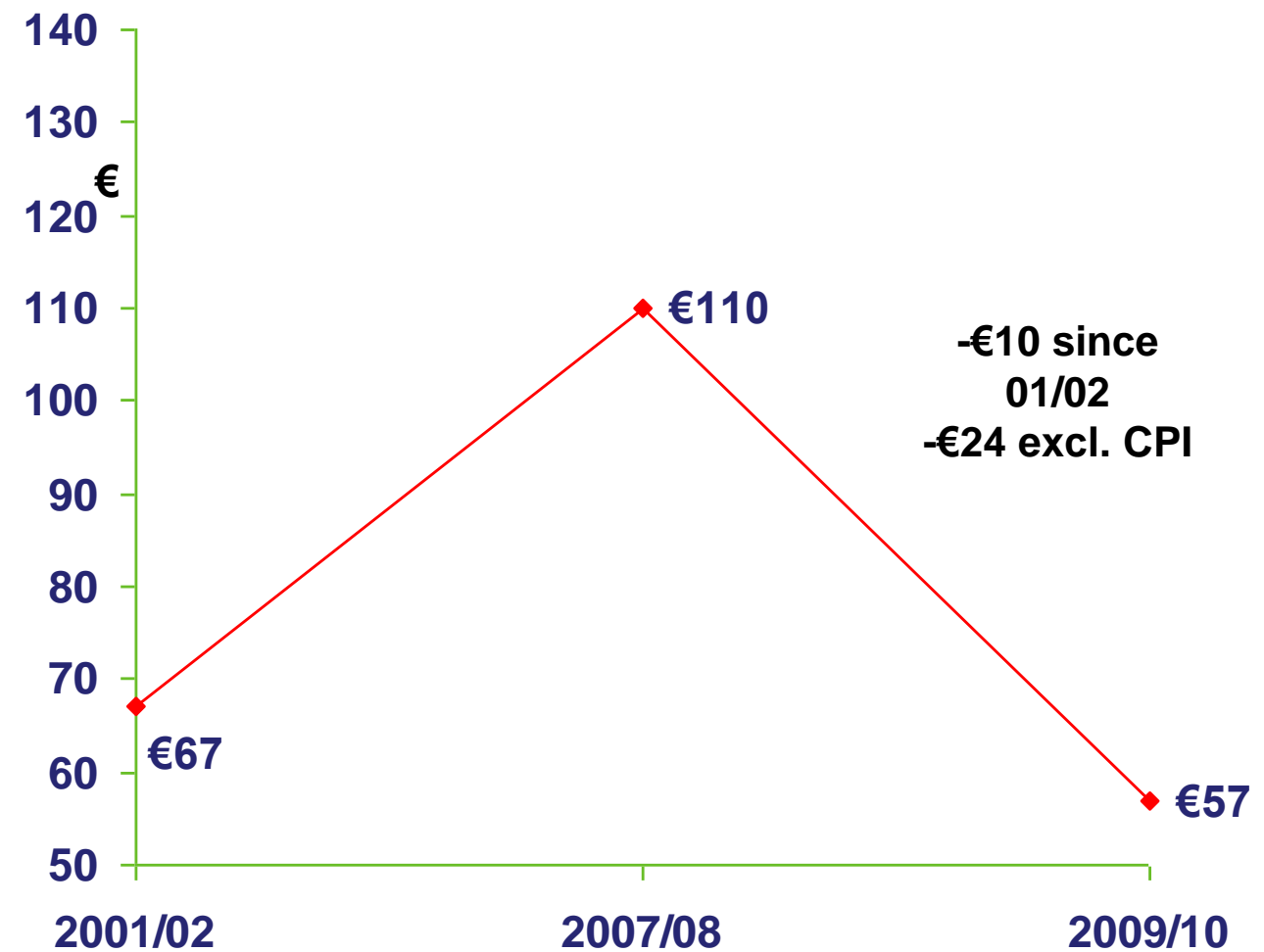
The purchasing of garden products has grown by 27% in the past eight years, though occasions have dropped back markedly since 05/06. Spend on garden products is static, however, indicating that pressure on prices, and changes in individual purchasing patterns are impacting on the market value.

# Purchase Of Garden Products – Summary\*

Average Spend Per Purchase\*  
Occasion



Per Capita Spend\*

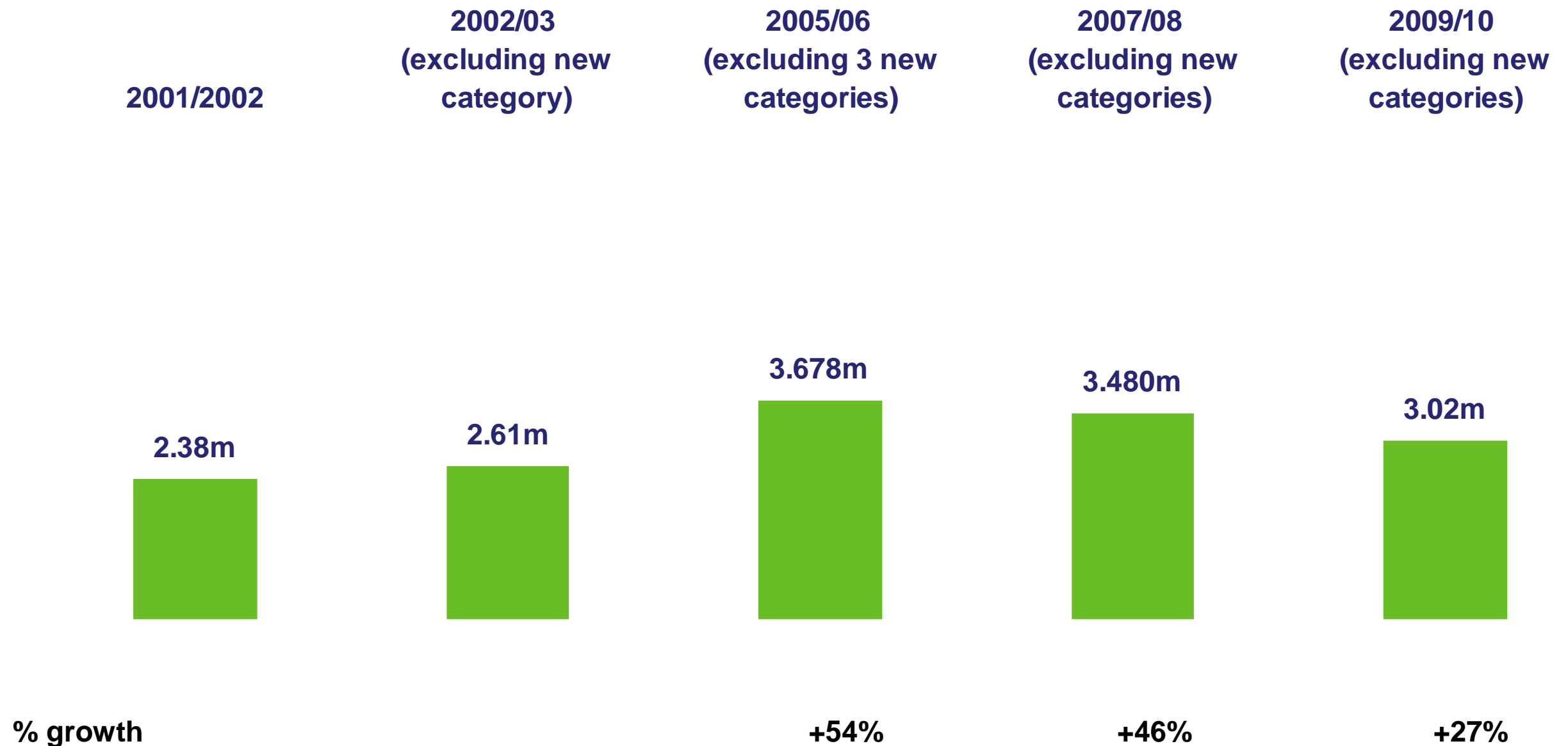


\*Comparable categories only

Per capita occasions up 7%

The average spend per purchase occasion has fallen back by €18. Although purchasing occasions relative to the population have grown by 7%, per capita spend has contracted over this period by 15%.

# Number of Purchase Occasions – Garden Products

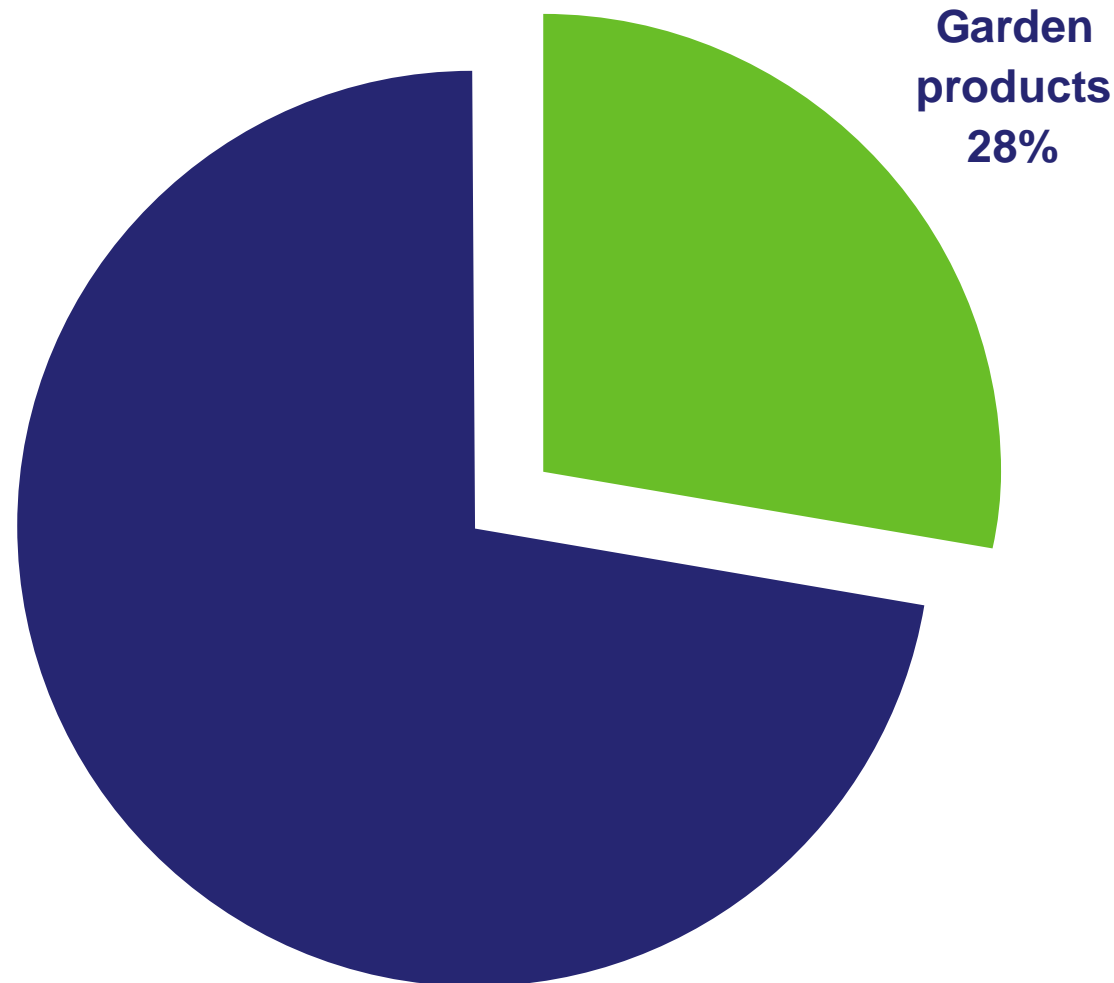


Purchasing of garden products has grown by 27% over the past eight years.

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# Purchase Occasions for Garden Products as a Proportion of Total Amenity Market\*

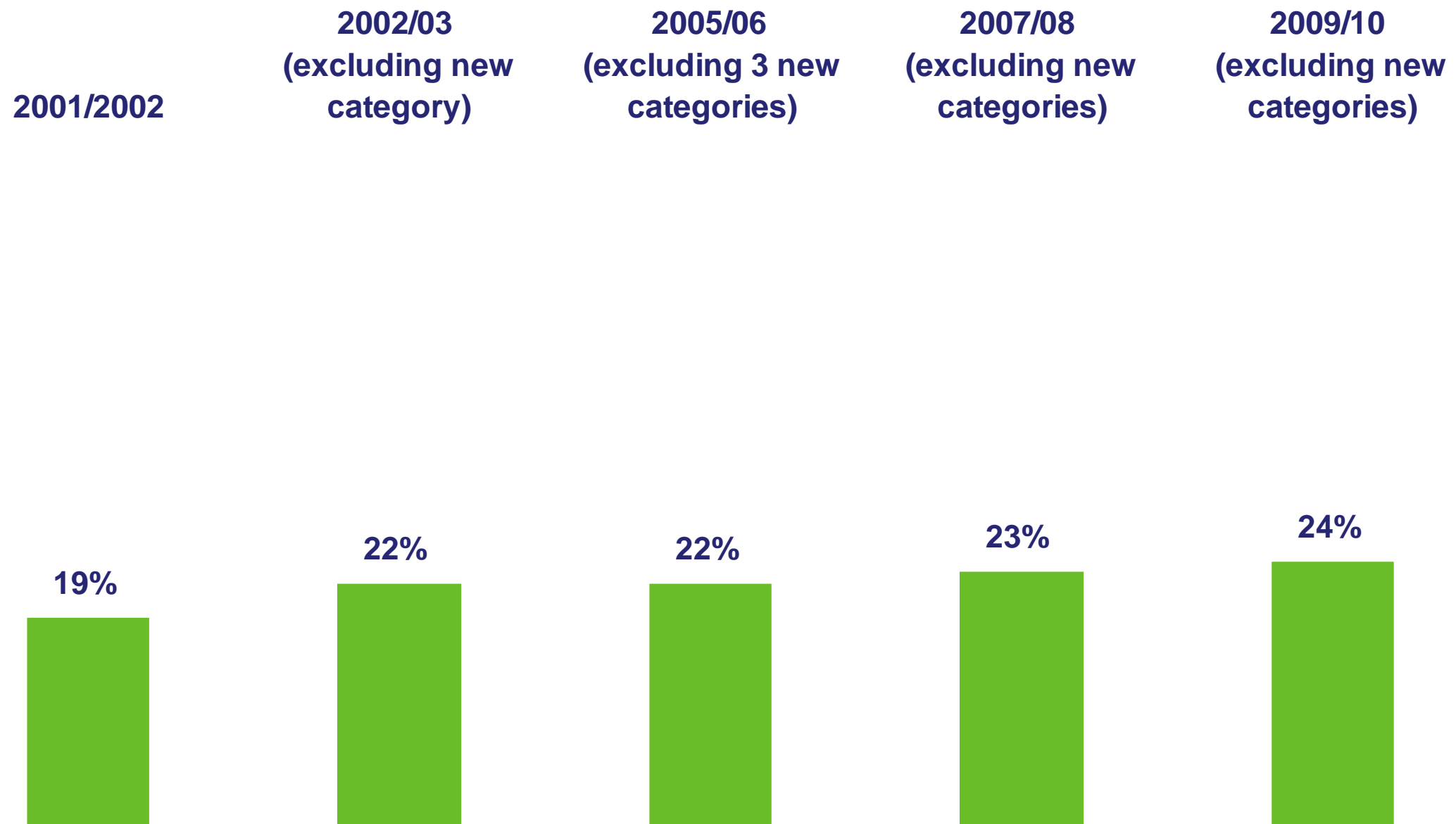


\* Excludes landscaping

Garden products represent 28% of all amenity purchases.



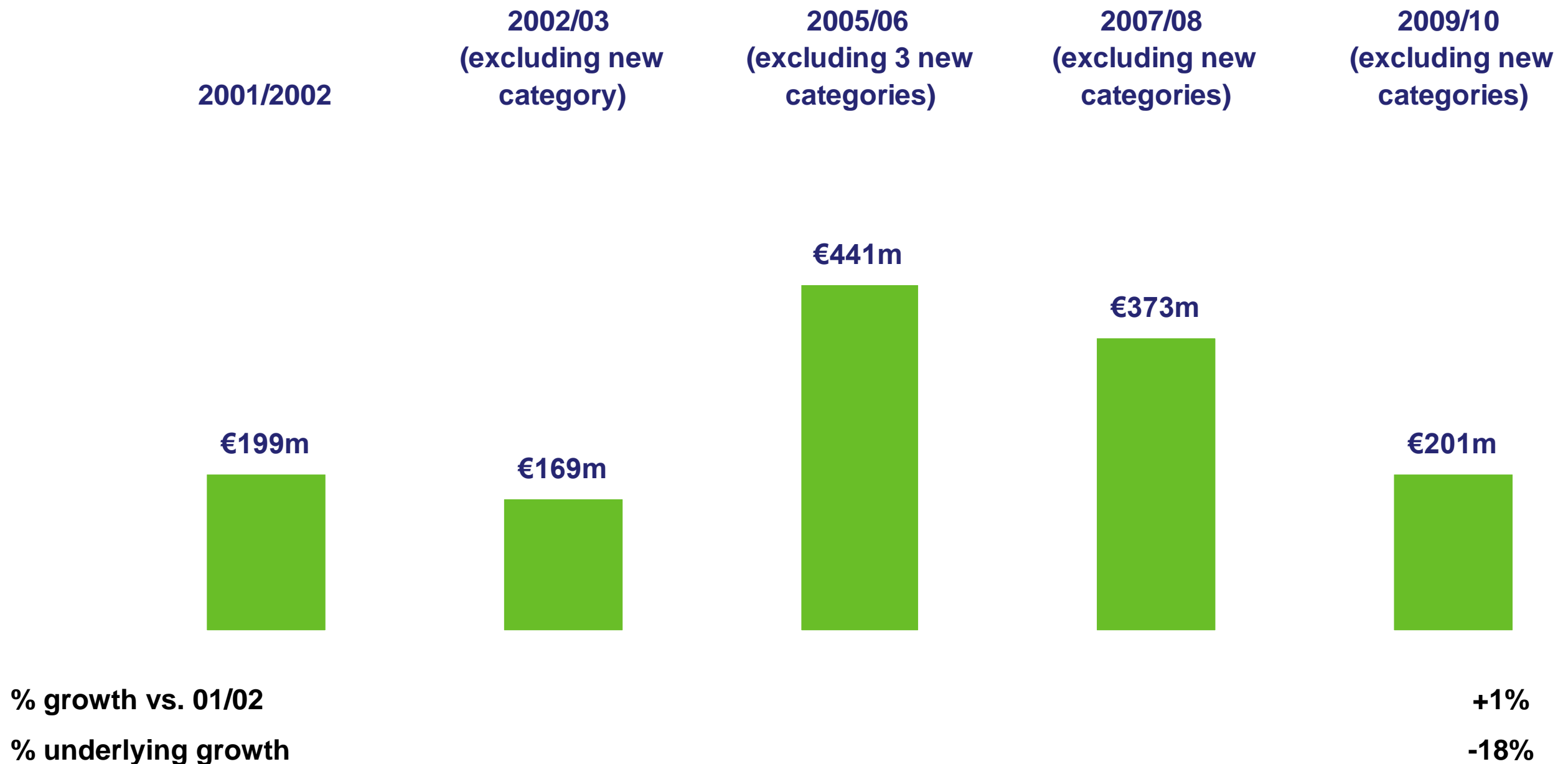
# Purchase Occasions Share Trend: Garden Products as a Proportion of Total Amenity Sector\*



\* Excludes landscaping

**About one quarter of all purchasing occasions relate to garden products. This has risen slowly but steadily since 2001/02.**

# Value of Purchases – Garden Products



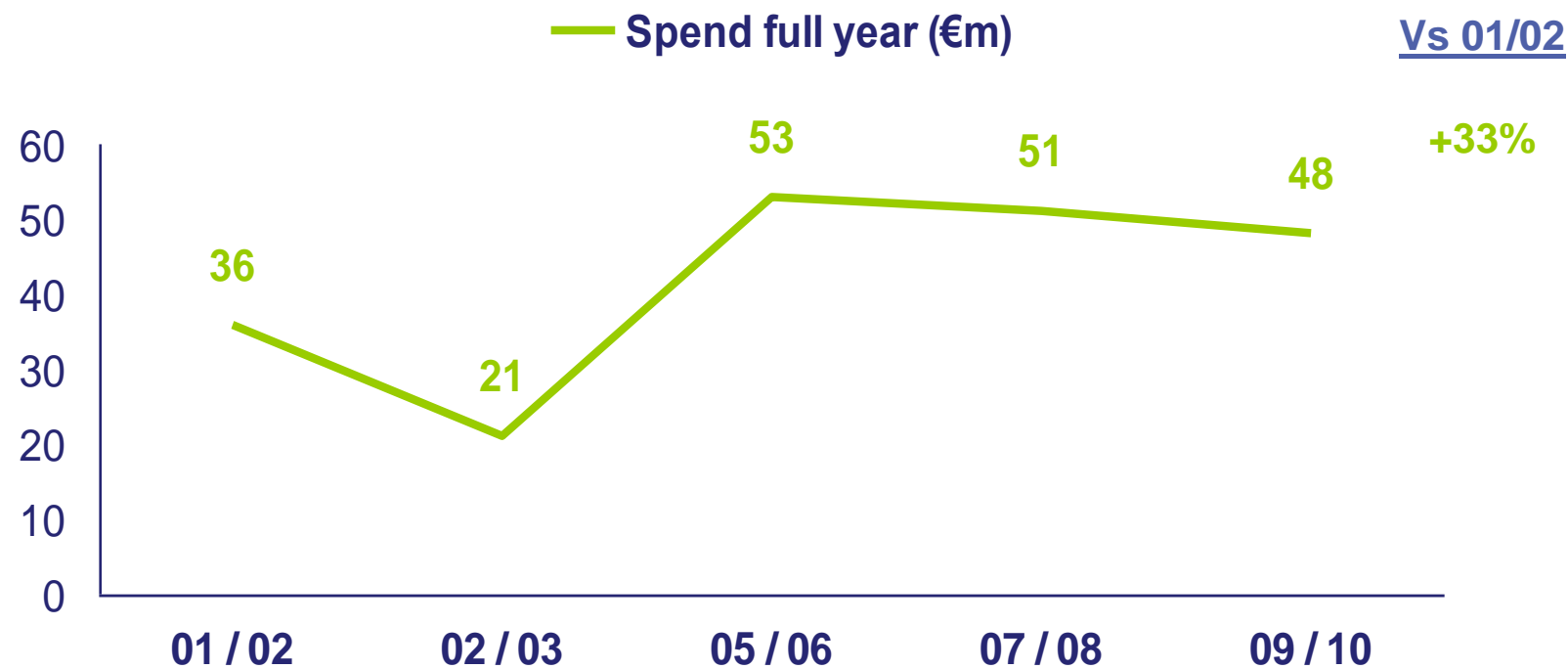
Spend on garden products rose significantly between 2005 and 2007, but is now back on a par with 2001/02 levels. Indeed, in real terms, spend has fallen by 18%.

# Breakdown of Value of Garden Products

	2001/2002	2002/2003	2005/2006	2007/2008	2009/2010	% change	% underlying change
	€m	€m	€m	€m	€m		
Garden treatment	19	13	32	24	27	+42	+17
Peat/bark/soil treatment	17	8	23	27	20	+18	-4
Garden accessories	37	20	76	24	23	-38	-49
Paving/decorative stones	47	46	106	105	36	-23	-37
Decking	29	30	78	78	33	+14	-6
BBQ equipment	14	18	40	28	19	+35	+12
Garden furniture	37	34	86	87	43	+16	-4
Gardening tools/equip.	N/A	19	50	48	44	+132	+100
Gardening structures	N/A	N/A	41	42	58	+41	+35
Garden trellising/fences	N/A	N/A	44	34	16	-64	-65
Other hard landscaping products	N/A	N/A	N/A	44	19	-57	-57

The most significant growth in this category has been in gardening tools/equipment, garden treatment, garden structures, and BBQ equipment. During the economic boom in Ireland, however, it was paving, decking and furniture which had the most significant jumps in value.

# Garden Treatment & Peat/Bark/Soil Treatment

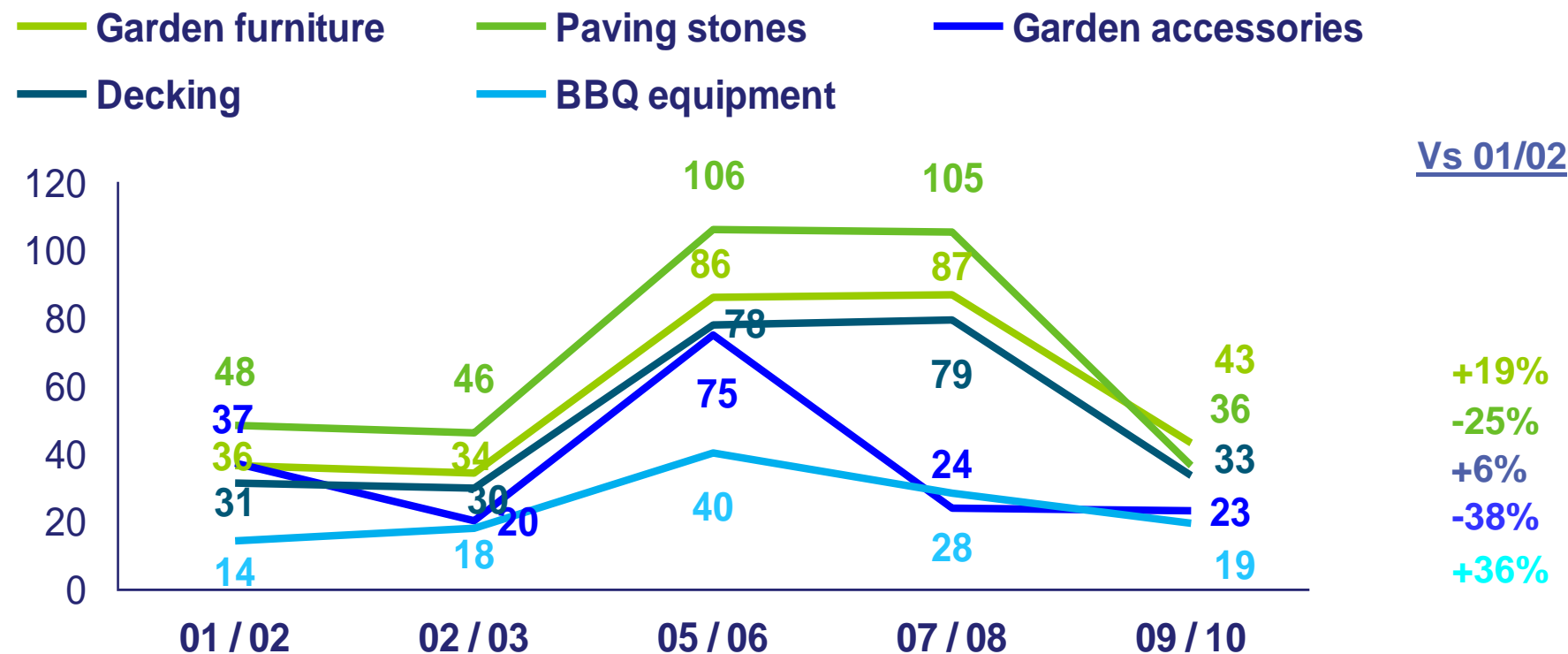


Occasions (m)	1.31	1.25	1.89	1.89	1.74	+33%
Spend per purchase occasion	€27.48	€16.80	€28.04	€26.98	€27.59	(+€0.11) =
Spend per capita	€12.15	€6.96	€16.47	€15.00	€13.61	(+€1.46) +12%
Individual Population (15+)	2.963m	3.017m	3.218m	3.398m	3.526m	+19%

## Product Summary

- Spend on traditional garden treatment products is valued at €48m, an increase of 33% since 2001/02.
- Purchasing occasions have grown by the same proportion. As spend per purchase occasion has remained static, it is increased activity which has driven growth in these product areas.

# Garden Infrastructure – Ornamental\*



## Product Summary

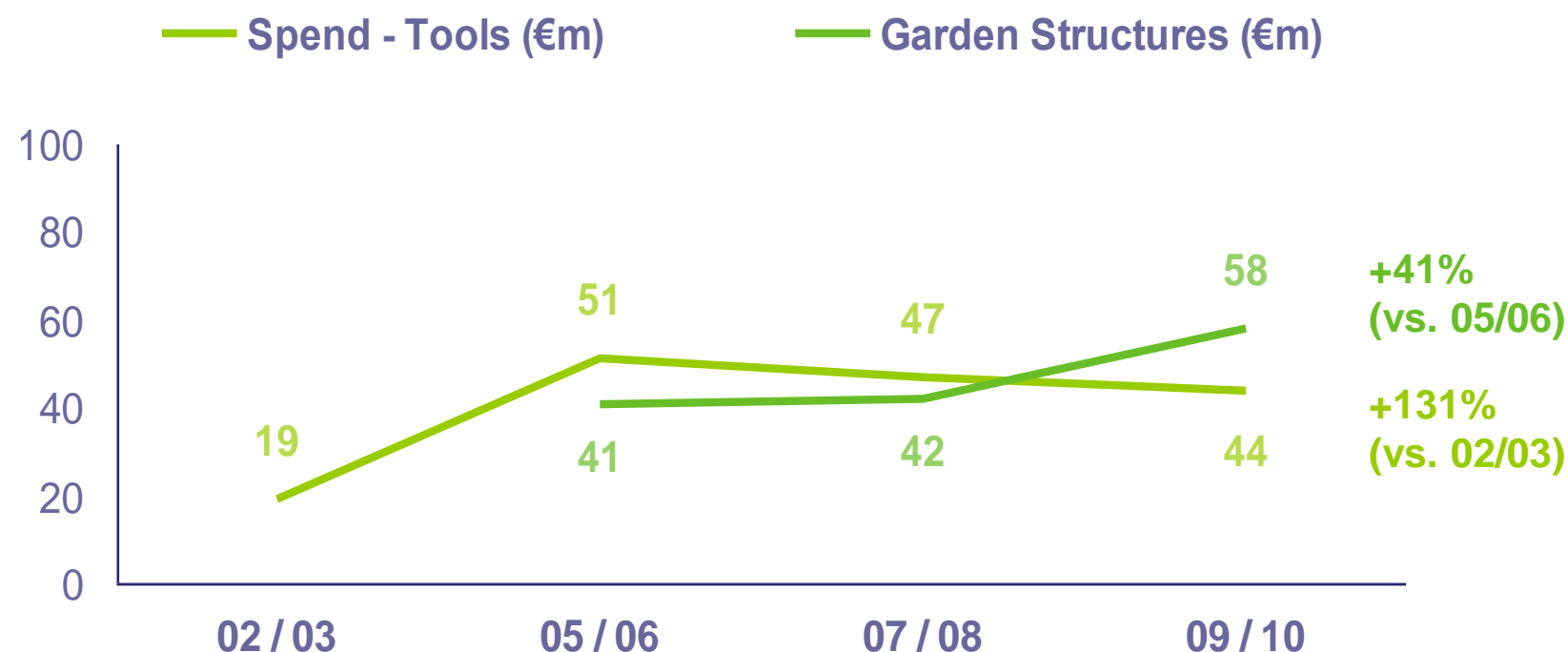
- Spend in garden products such as accessories, furniture, paving, decking and BBQ equipment grew in the greatest proportions during the housing boom. Since '07/'08, spend across all these products have all contracted.
- In the long term, BBQ and furniture values have grown, as has decking, while spend in garden accessories and paving has declined.
- Overall, activity in garden infrastructure has increased by 29%, while spend has fallen by 7%, implying that increased occasions are sustaining market value.

Occasions (m)	0.99	1.03	1.85	1.68	1.28	+29%
Spend per purchase occasion	€167	€144	€208	€192	€120	(-€47) -28%
Spend per capita	€56	€49	€120	€95	€44	(-€12) -21%
Individual Population (15+)	2.963m	3.017m	3.218m	3.398m	3.526m	+19%

\* Including garden accessories, furniture, paving, decking, BBQ

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# Garden Infrastructure – Functional\*



Occasions (m)	0.42	0.87	0.71	0.59	-32%
Spend per purchase occasion	€45.24	€105.75	€125.35	€172.88	(+€67.13) +63%
Spend per capita	€6.30	€28.59	€26.19	€28.93	(+€0.34) +1%
Individual Population (15+)	3.017m	3.218m	3.398m	3.526m	+19%

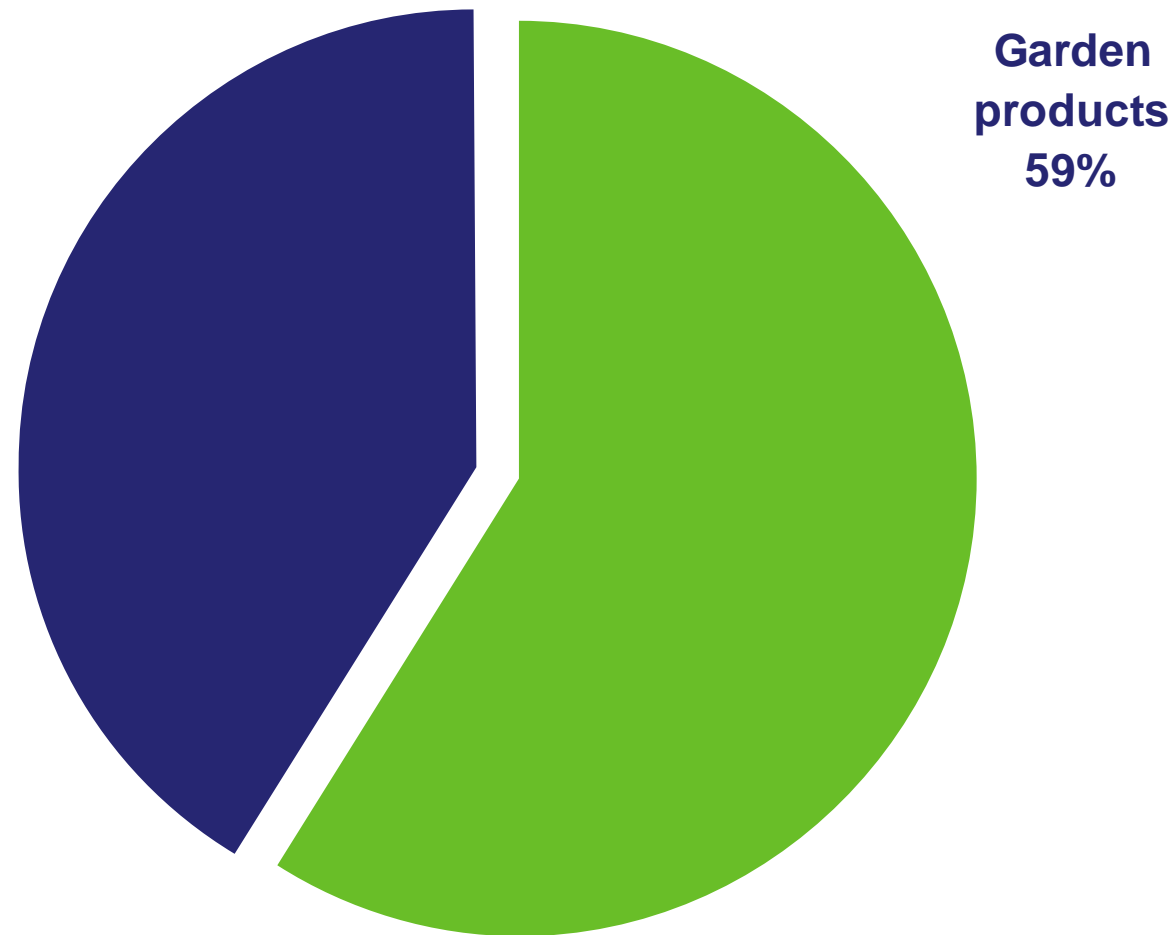
\* Including gardening tools & structures

Compare '05/'06 vs. '09/'10

## Product Summary

- Despite the severe contraction witnessed in other product areas, the value of gardening tools has remained fairly steady over the past five years, suggesting that these are recession proof products.
- Garden structures – associated with the “grow your own” market, have grown by 41% in four years.
- Spend per purchase occasion also seems to be increasing; perhaps due to larger structures (e.g. glasshouses) being purchased.

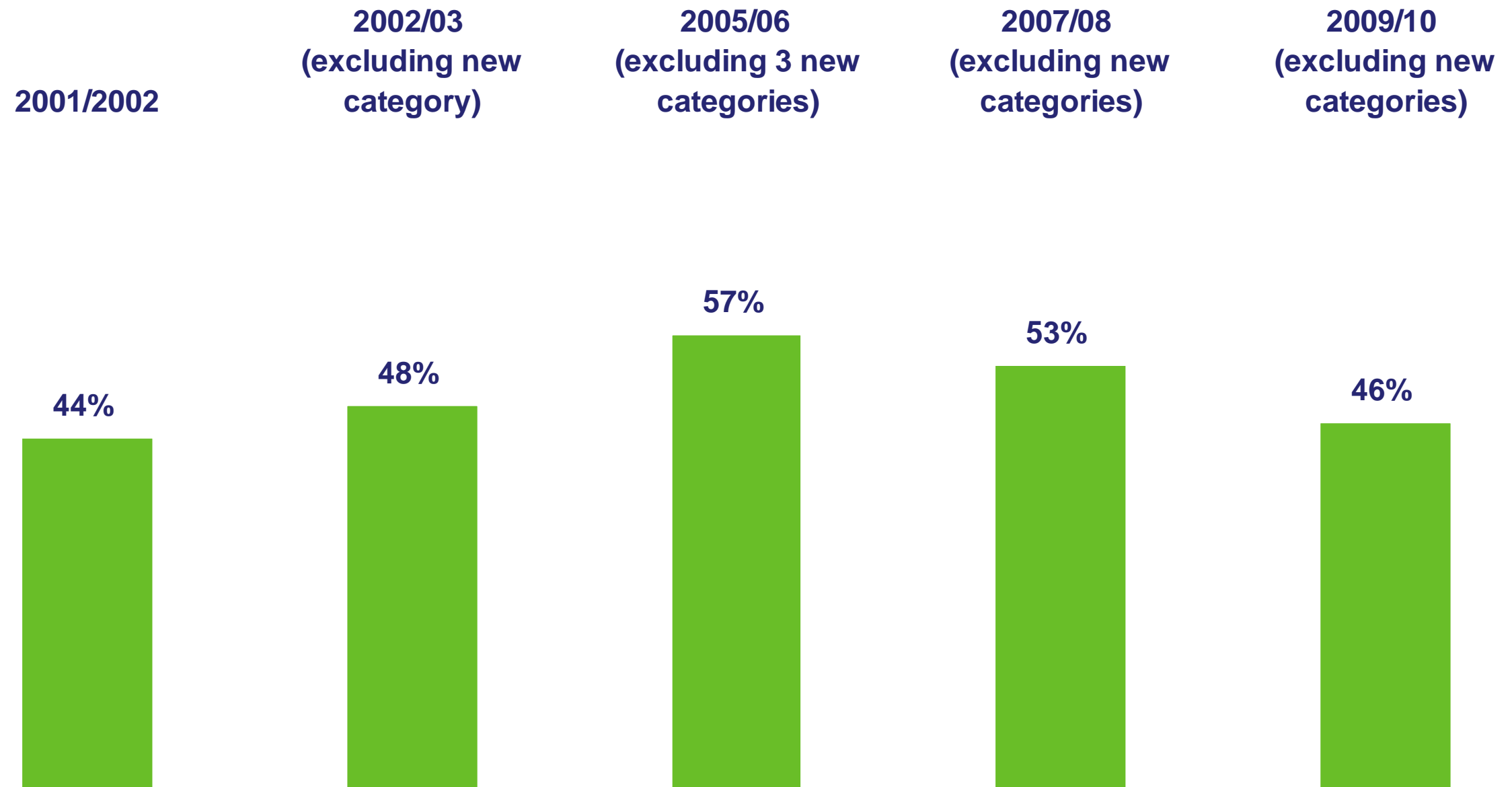
# Value of Garden Products as a Proportion of Total Amenity Market



\* Excludes landscaping

Garden products account for 59% of the value of the total amenity market.

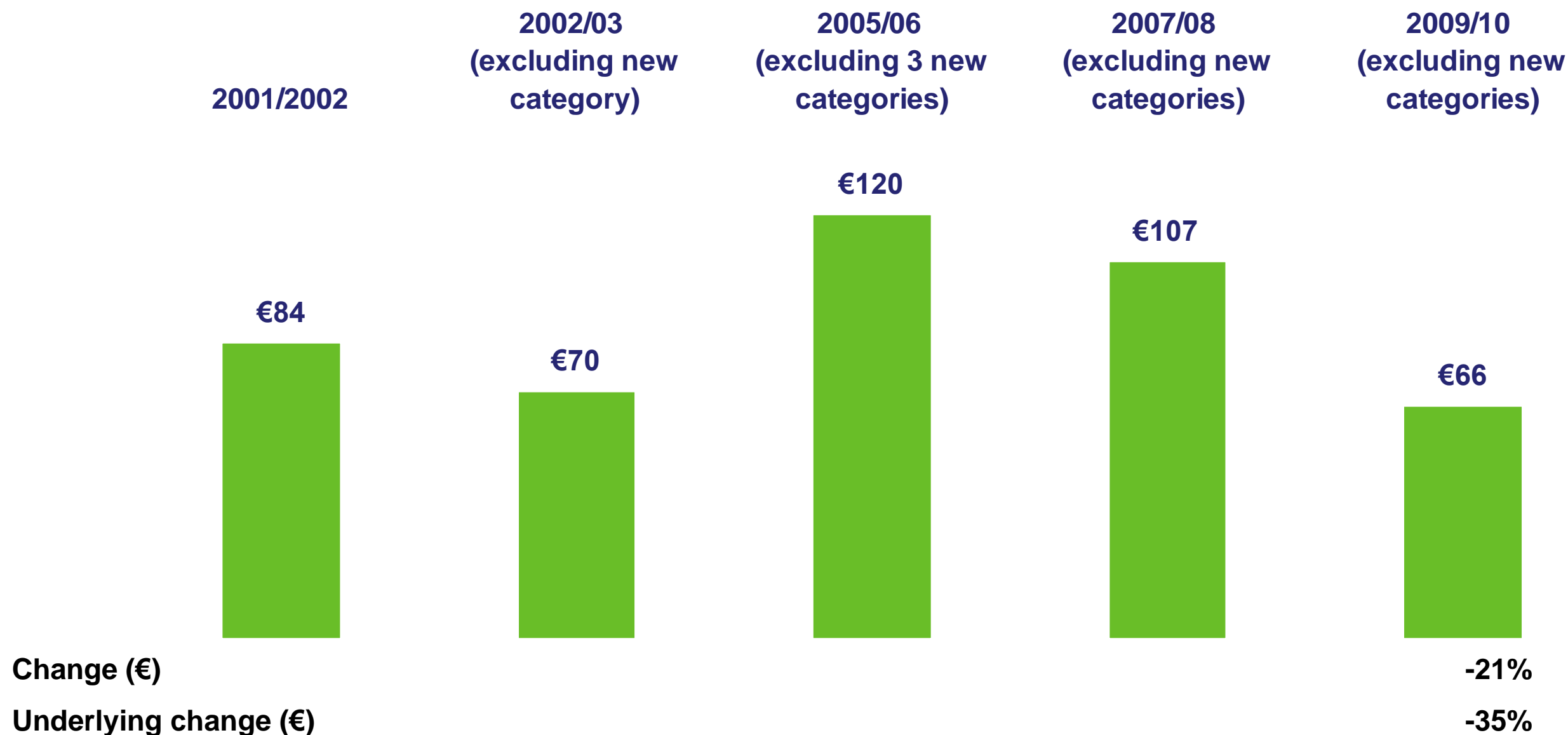
# Value Share Trend: Garden Products as a Proportion of Total Amenity Sector



In terms of spend, garden products account for 46% of spend in the amenity market – a similar proportion recorded in 2001/02. During the boom years, garden products dominated the amenity market – with 57% of spend being channelled through this product category.



# Average Spend Per Purchase Occasion – Garden Products



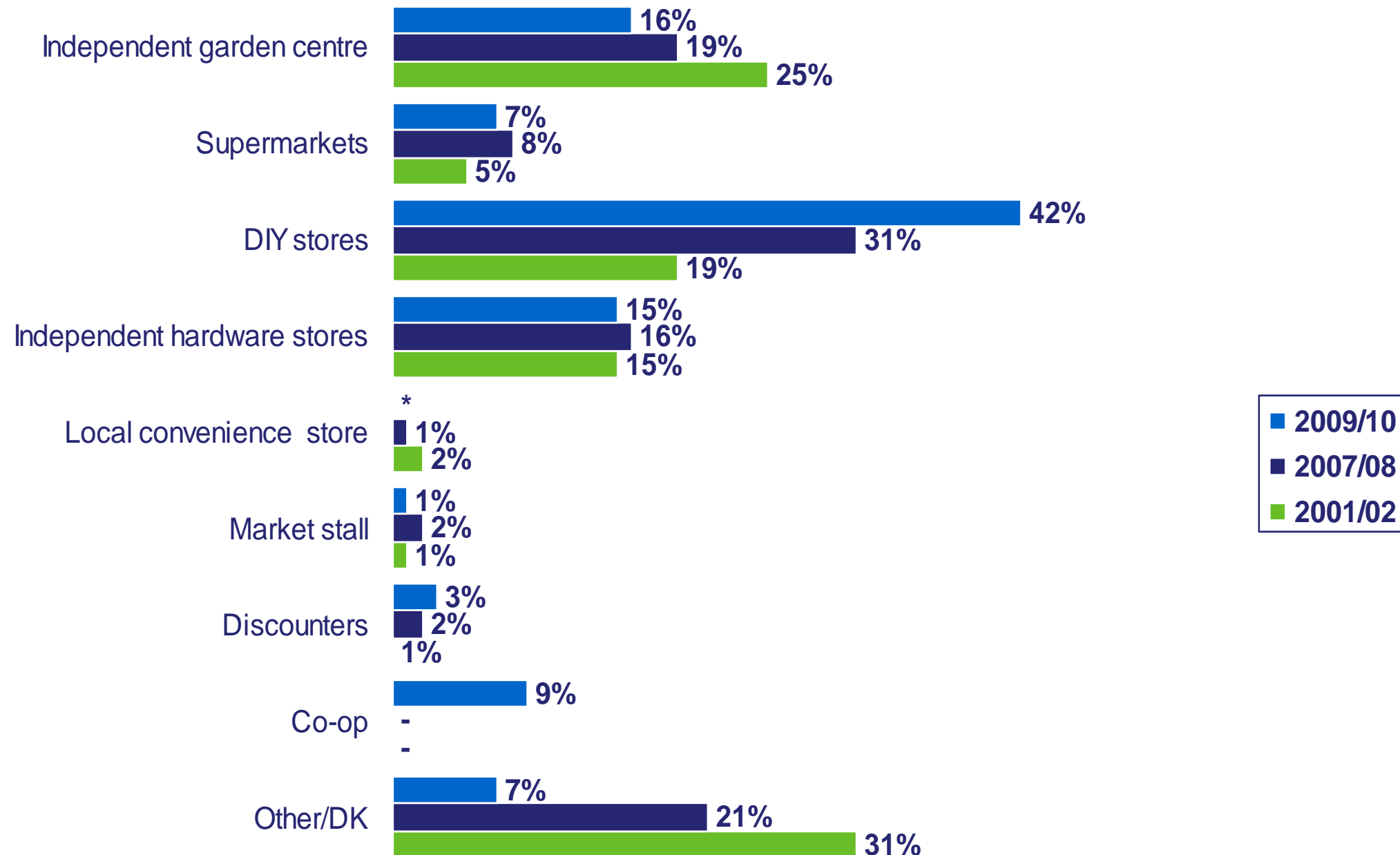
The average spend per purchase occasion has almost halved in four years, and is now at a lower level than when measured in 2001/02.

# Average Spend Per Purchase Occasion

	2005/2006	2007/2008	2009/2010
✓ Garden treatment	€32	€25	€28
✓ Peat/bark/soil treatment	€29	€28	€27
✓ Garden accessories	€109	€53	€55
✓ Paving/decorative stones	€353	€354	€178
✓ Decking	€780	€709	€464
✓ BBQ equipment	€100	€82	€57
✓ Garden furniture	€215	€240	€165
✓ Gardening tools/equip.	€71	€82	€87
✓ Gardening structures	€410	€385	€658
✓ Garden trellising/fences	€220	€177	€172
✓ Other hard landscaping products	n/a	€344	€156

**Spend per occasion on gardening structures has increased somewhat in 2009/2010, as have tools/equipment, albeit at a lower rate. There has been some significant fall-offs in spend in many other categories.**

# Value Market Share For Garden Products by Channel



**The DIY dominates this market with 42% of spend, and share is continuing to climb strongly. Independent Co-ops account for 9% of value. Independent garden centres' share is contracting.**

\* Excludes landscaping and new categories

# Channels for Garden Products by Category: 2009/2010 (Purchase Occasion Based)

	Total Category	Garden treat- ment	Peat/ bark/soil treatment	Garden access- ories	Paving/ Decora- tive stones	Deck- ing	BBQ equip- ment	Garden furniture	Garden- ing tools/ equipment	Gardening structures	Garden Trellising /fences	Other hard land- scaping
	%	%	%	%	%	%	%	%	%	%	%	%
Independent garden centre	15	15	30	36	25	17	1	5	15	13	20	5
Supermarket	7	5	6	10	3	1	16	9	2	13	6	4
DIY stores	38	27	31	34	39	36	52	60	37	15	23	51
Independent hardware store	14	9	13	9	24	35	6	8	17	6	14	12
Local convenience store	1	1	1	*	1	-	*	-	*	-	5	-
Local Co-op	10	35	9	2	3	8	6	1	18	3	13	9
Discounters	3	2	3	2	*	-	12	2	3	6	8	-
Others	12	6	7	7	5	3	7	15	8	44	11	19

**DIY stores have captured over half of the spend on the garden furniture and BBQ market, while independent garden centres hold the greatest proportion of spend on peat/bark/soil and garden accessories.**

# Garden Products – Summary

- ✓ The definition of the garden products segment has been expanded since 2001 (four categories have been added since 2001).
- ✓ Excluding these additional categories, the garden products market has grown from €199m to €201m since 2001 (+1%). Taking inflationary changes into account, the market has contracted by 18% over this period.
- ✓ The additional categories were worth an additional €137m to the market segment bringing the total value of this category to €338m - as currently measured.
- ✓ The dynamics in this segment have changed since initial measurement. Up until two years ago garden furniture, decking, paving/decorative stones and BBQ equipment were the strongest performing and growing product areas. However, a longer term measure suggests that the sustained growth has been with more functional items – garden treatment (+42%), tools and equipment (+132%) and structures (+41%).
- ✓ The number of purchase occasions have grown in this sector. Excluding the four new categories, purchasing occasions have grown by 27%, and per capita occasions have also expanded but only by 7%.
- ✓ DIY stores increased their position in the garden products market, while independent garden centres accounted for 16% of spend in this category. Their share declined from 25% as measured in 2001/02.

# Landscaping Services

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***Bord Bia***  
Irish Food Board

# Landscaping Services – Summary

	Spend		Occasions		Average spend per occasion	
	07/08	09/10	07/08	09/10	07/08	09/10
	€m	€m	€m	€m	€m	€m
Total market	176	144	0.671	0.689	263	208
Garden designer	52	47	0.06	0.087	875	543
Garden maintenance	38	42	0.414	0.437	91	97
Garden makeover	64	33	0.087	0.072	733	461
Tree Surgeon	22	21	0.110	0.093	203	224

**The landscaping market is estimated to be worth €144m - as measured by consumer spend. Spend is spread across maintenance and more specific design/makeover requirements, though two thirds of 'occasions' related to maintenance.**