

Garden Market Purchasing 2011/2012

Growing the success of Irish food & horticulture

Bord Bia
Irish Food Board

Table of Contents

- Introduction
 - Background & Objectives
 - Research Methodology
- Charted Findings
 - Market Size Summary
 - Outdoor and Flowering Plants
 - Indoor Potted Plants
 - Fresh Cut Flowers
 - Garden Products

Introduction

Definition Of Underlying Growth

- All trend figures for value show the absolute growth from 2001/02 to 2011/12.
- Underlying growth is calculated by stripping out price inflation over the past ten 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%
2010	-0.95%
2011	+2.6%
- Definition of per capita spend
 - Spend divided by population
- Definition of per capita occasions
 - Occasions divided by population

Background & Objectives

- In 2001, Bord Bia expressed a requirement to establish market size in the amenity sector.
- The amenity sector covers such items as trees, shrubs, plants, cut flowers, foliage, indoor potted plants and bulbs.
- The specific objective of the research is to provide Bord Bia with a measure of spend, source of product and motivation for purchase of amenity produce at a household and individual level, thus providing the organisation with:
 - a market size for household purchases;
 - a market size for gift purchases;
 - a market size by source.

Research Methodology

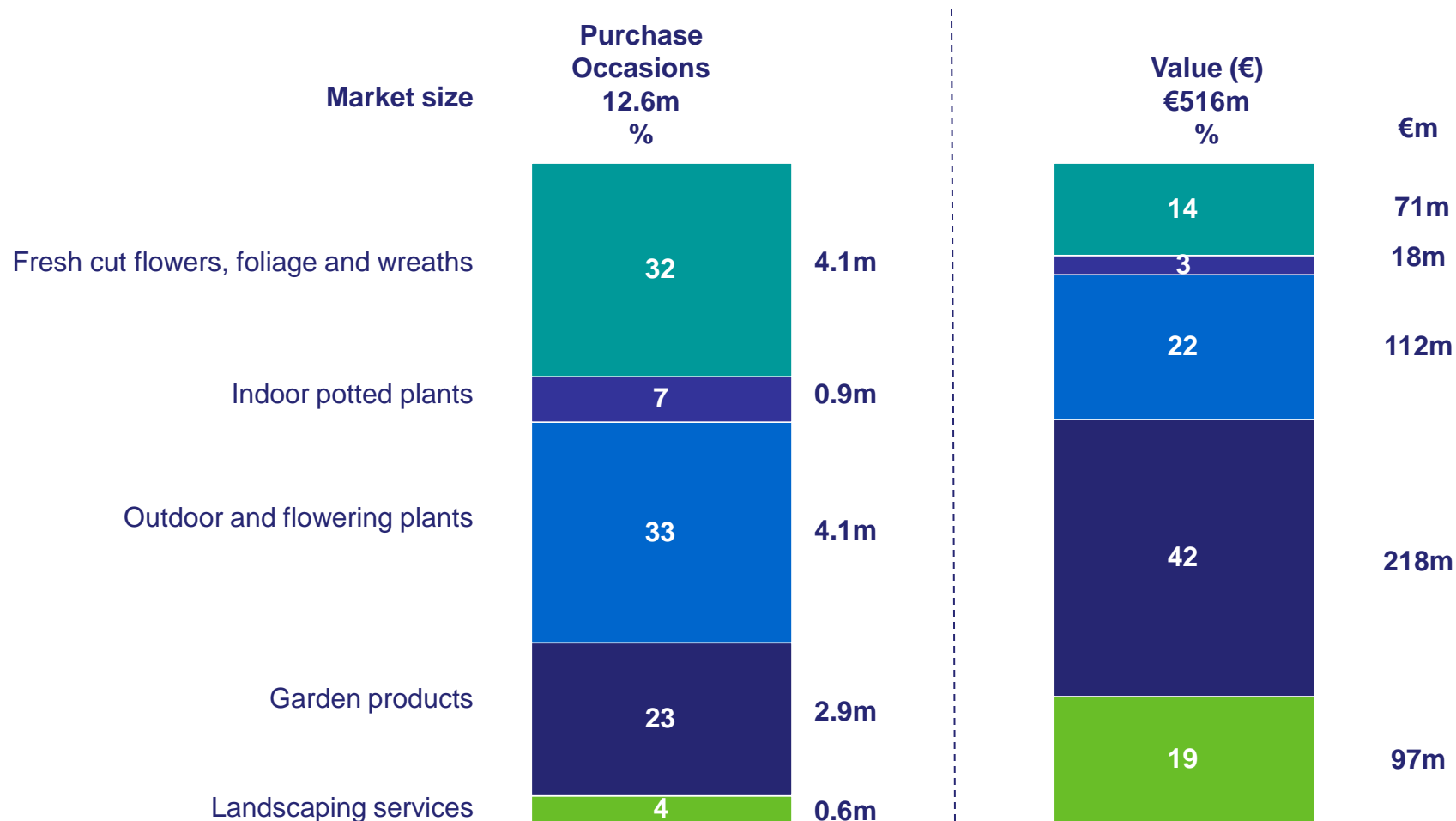
- Ipsos MRBI's recommendation was to conduct a continuous consumer survey among the adult population in Ireland.
- Interviewing would be spread throughout the year ensuring that all peak purchasing periods would be included in the research.
- To maximise the accuracy of the information obtained, purchases only relating to the past week were recorded during the 'recall' interview.
- Interviews were conducted via Ipsos MRBI's Omnipoll. Omnipoll is a two-weekly telephone omnibus survey, interviewing a sample of 1,000 adults (aged 15+) per wave. Omnipoll 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.

Reporting Context

- Population has grown by 18% since 2001. In 2011 there were 75,000 new births, which is driving population growth.
- Unemployment now stands at 14.7% from a low of 4% just ten years ago.
- New housing unit completions peaked in Ireland in 2006 (93,000) but since contracted to half this level in 2008 (51,000) and has continued to fall dramatically – new house completions in 2011 are in the region of 10,000. It is estimated now that 300,000 units lie idle in Ireland currently.
- Inflation (CPI) is on the rise again, currently standing at 2.2%.
- Only 1 in 4 adults believe that employment levels and the economy will improve in the next twelve months (source: Ipsos MRBI confidence monitor – April 2012). The same proportion are pessimistic about the economy, while about half expect the economy to remain steady over the next year.
- This uncertainty has led to Irish consumers saving about 12% of their disposable income – up dramatically since the early 2000's.
- Ireland has returned to a net migration nation.

Market Size Summary

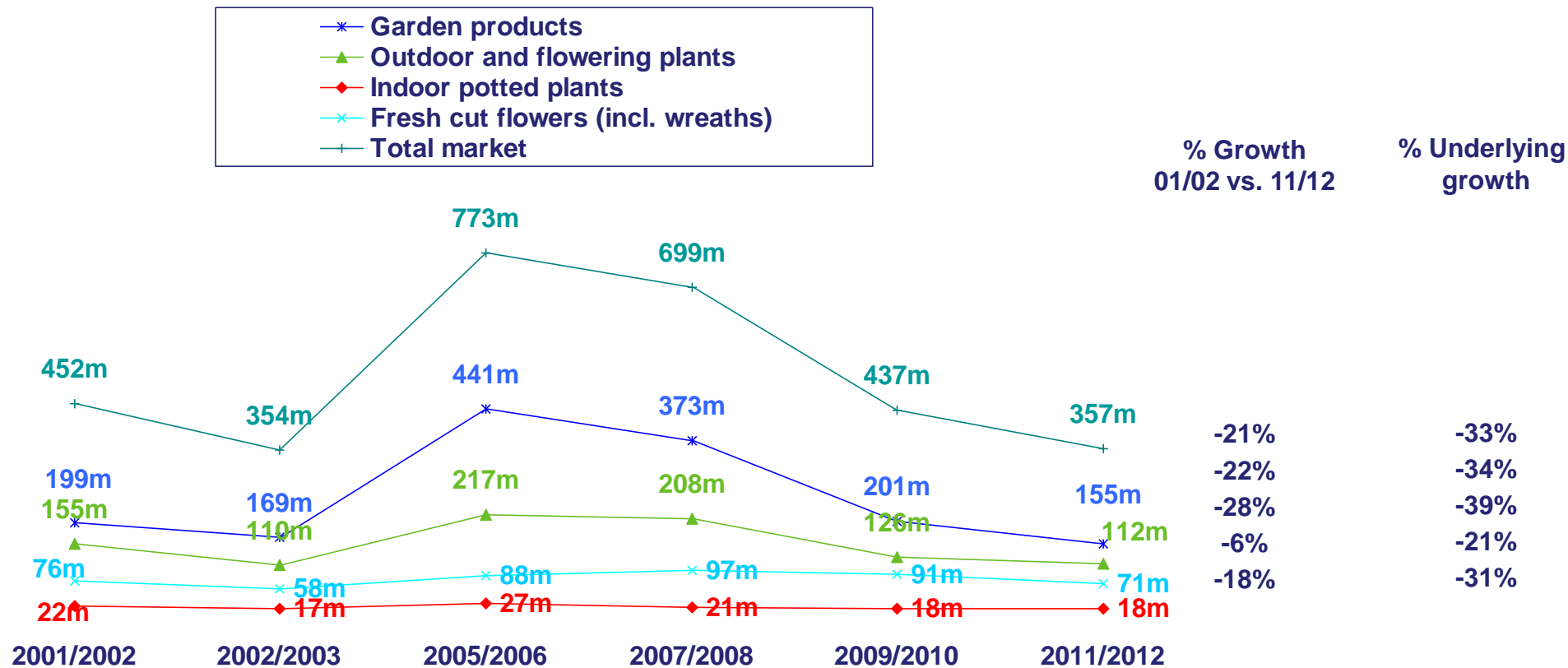
Market Size Summary – 2011/12



The amenity market is valued at €516m. Outdoor and flowering plants account for 33% of all purchasing occasions, and 22% of spend. Larger ticket items, such as hard landscaping products, account for 42% of spend, but only a third of purchasing occasions.

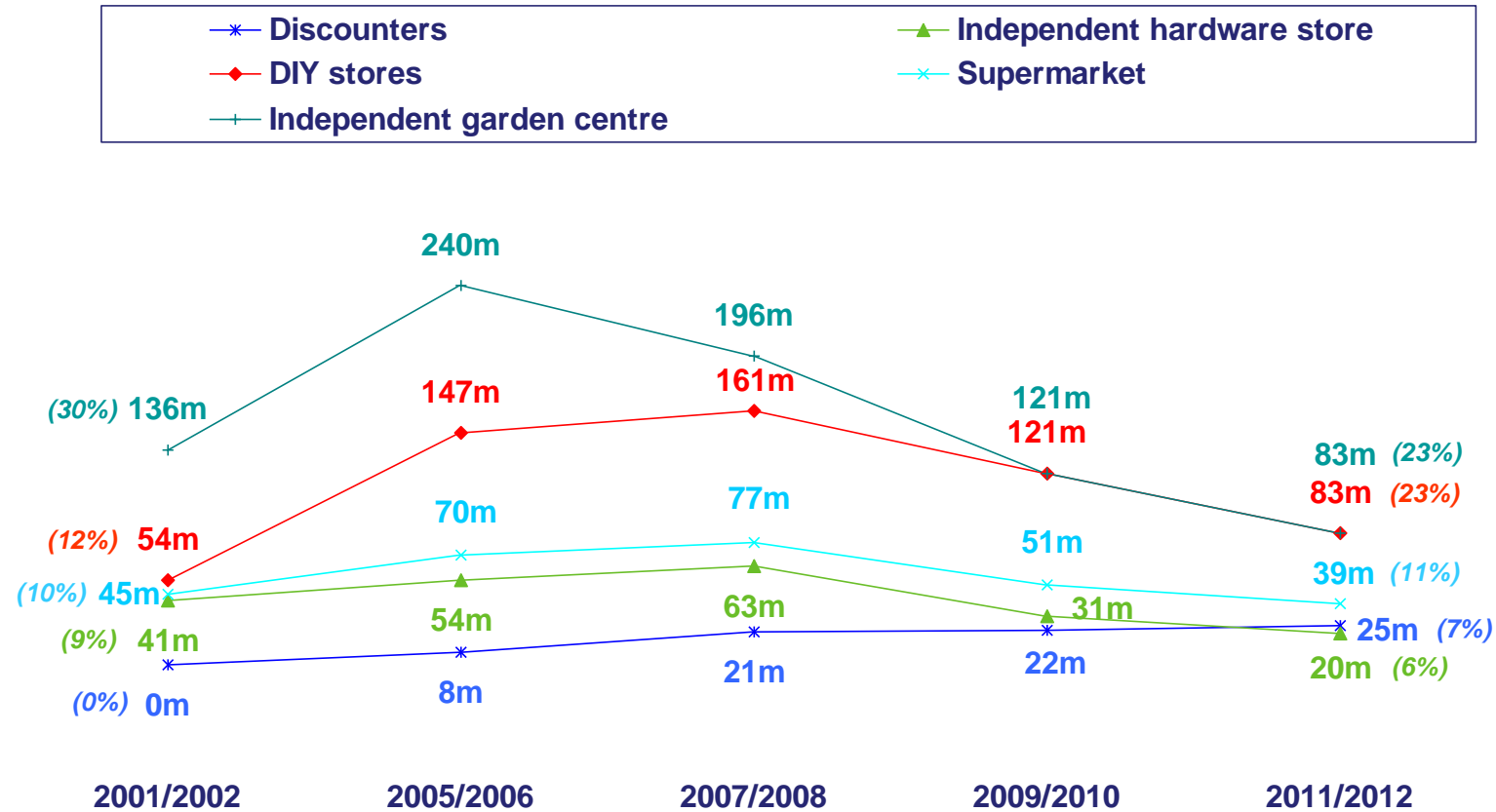
Amenity Market Size Growth**

- 2001/2002 Vs. 2011/2012



** excludes new categories since 01/02 and landscaping

Market Share For Amenity Products X Channel



Discounters now hold 7% of the value of the amenity market, at the expense of the independent garden centres whose share is at its lowest level yet (23%).

Market Share X Channel X Sector – 2005/06 to 2011/12

	Outdoor & Flowering Plants								Indoor Potted Plants							
	Occasions				Value				Occasions				Value			
	%				%				%				%			
	11/12	09/10	07/08	05/06	11/12	09/10	07/08	05/06	11/12	09/10	07/08	05/06	11/12	09/10	07/08	05/06
Independent garden centres	30	33	35	39	47	51	51	50	20	22	25	27	20	41	39	32
Supermarket	14	16	16	18	7	9	7	8	30	30	27	36	16	20	19	24
DIY stores	24	27	23	21	20	21	17	14	19	22	21	18	21	21	23	20
Independent hardware store	3	3	5	3	3	1	2	5	2	1	2	2	1	1	1	2
Local convenience store	2	2	2	7	2	1	1	5	2	1	1	5	3	1	1	4
Market stalls	3	3	3	4	1	2	4	2	4	1	2	2	2	1	2	1
Florist	2	2	2	3	2	4	2	5	7	6	7	6	13	6	6	5
Discounters	14	10	8	2	7	4	3	1	12	11	11	4	13	6	6	6
Co-op	2	2	n/a	n/a	n/a	1	n/a	n/a	1	*	n/a	n/a	1	*	n/a	n/a
Others	6	2	7	3	12	6	14	10	3	6	4	-	10	4	4	6

Spend on outdoor and flowering plants channelled through independent garden centres has dipped below 50% for the first time. Share of occasions continues to slide as DIY stores and discounters make further gains in the market.

Market Share X Channel X Sector – 2005/06 to 2011/12

	Fresh Cut Flowers								Garden Products							
	Occasions				Value				Occasions				Value			
	%				%				%				%			
	11/12	09/10	07/08	05/06	11/12	09/10	07/08	05/06	11/12	09/10	07/08	05/06	11/12	09/10	07/08	05/06
Independent garden centres	3	5	6	7	4	11	8	10	19	20	21	25	14	15	16	24
Supermarket	41	35	39	43	31	25	25	24	10	12	12	15	7	7	8	5
DIY stores	1	4	3	3	1	7	5	3	35	37	34	29	31	38	29	25
Independent hardware store	-	*	1	6	-	*	1	1	9	9	13	12	13	14	15	13
Local convenience store	1	1	2	6	1	1	2	6	2	1	2	6	2	1	2	5
Local Co-op	*	*	-	-	*	*	-	-	6	7	-	-	12	10	-	-
Market stalls	4	2	3	4	4	4	7	4	2	*	1	-	2	*	1	1
Florist	22	25	27	30	34	32	40	43	1	*	1	-	*	*	*	-
Discounters	24	18	14	5	18	12	7	2	7	6	5	2	3	3	2	1
Others	4	10	5	1	7	8	5	7	9	8	12	11	16	12	27	26

Discounters have taken a 24% share of occasions in the cut flowers market. Supermarkets, including discounters, now account for two thirds of all purchases on cut flowers. DIY stores account for more than a third of purchasing occasions and spend within the garden product category.

Findings

Outdoor And Flowering Plants

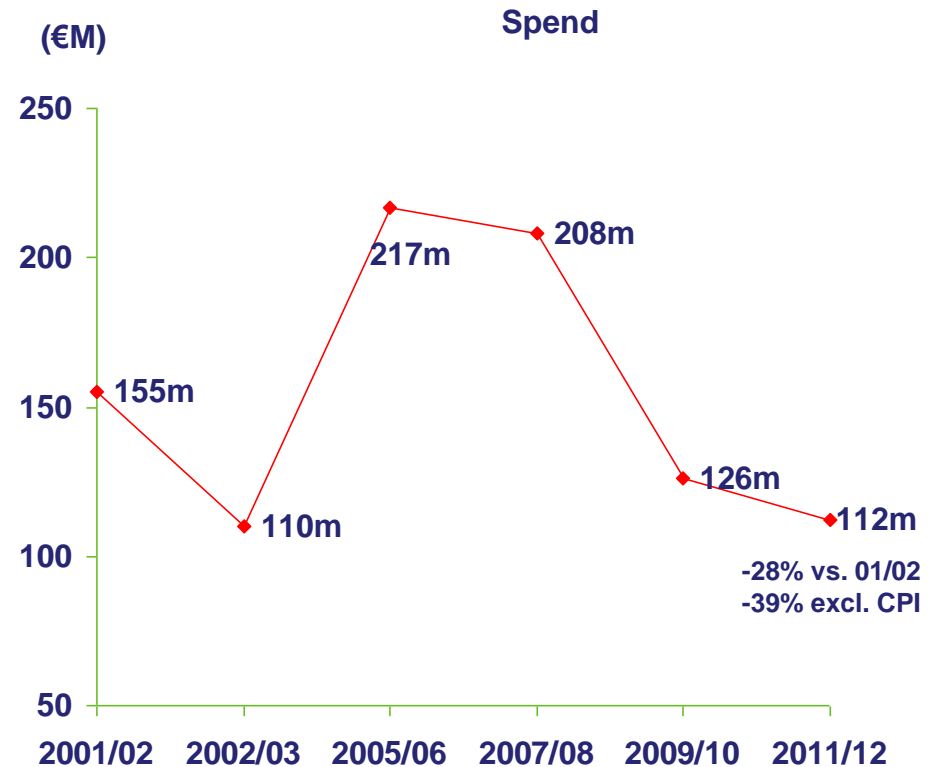
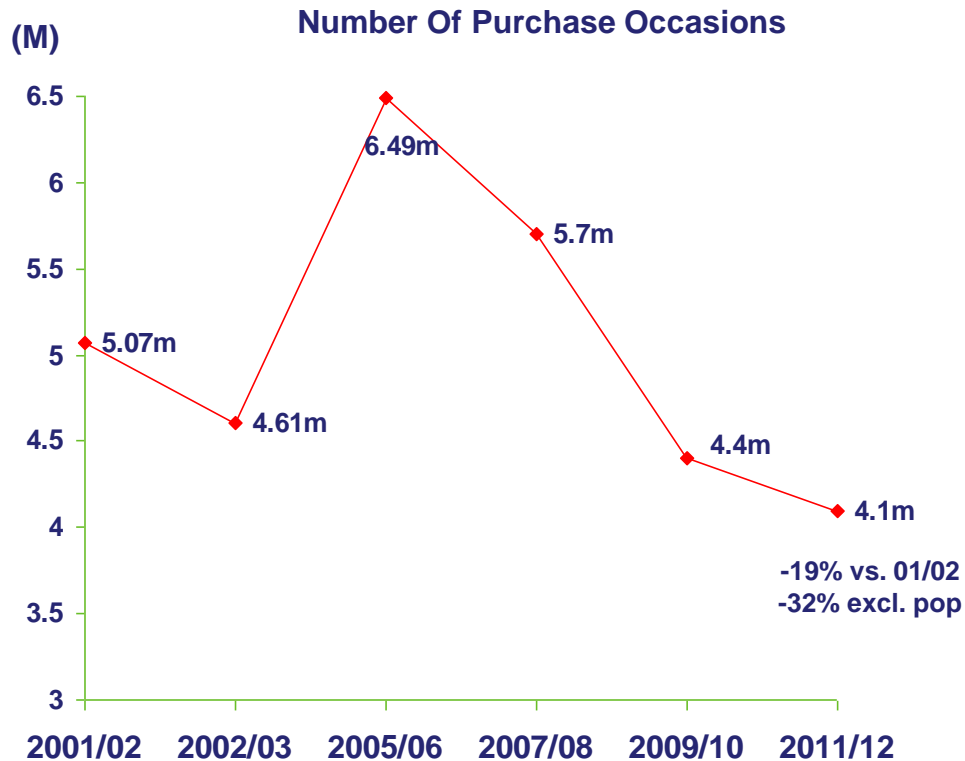
Outdoor And Flowering Plants Category

- Definition includes:
 - Pre-planted hanging baskets or outdoor containers
 - Bulbs/seeds for planting (e.g. daffodils, sweet pea, lettuce seed)
 - Trees/hedges
 - Shrubs
 - 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)

Outdoor And Flowering Plants – Summary

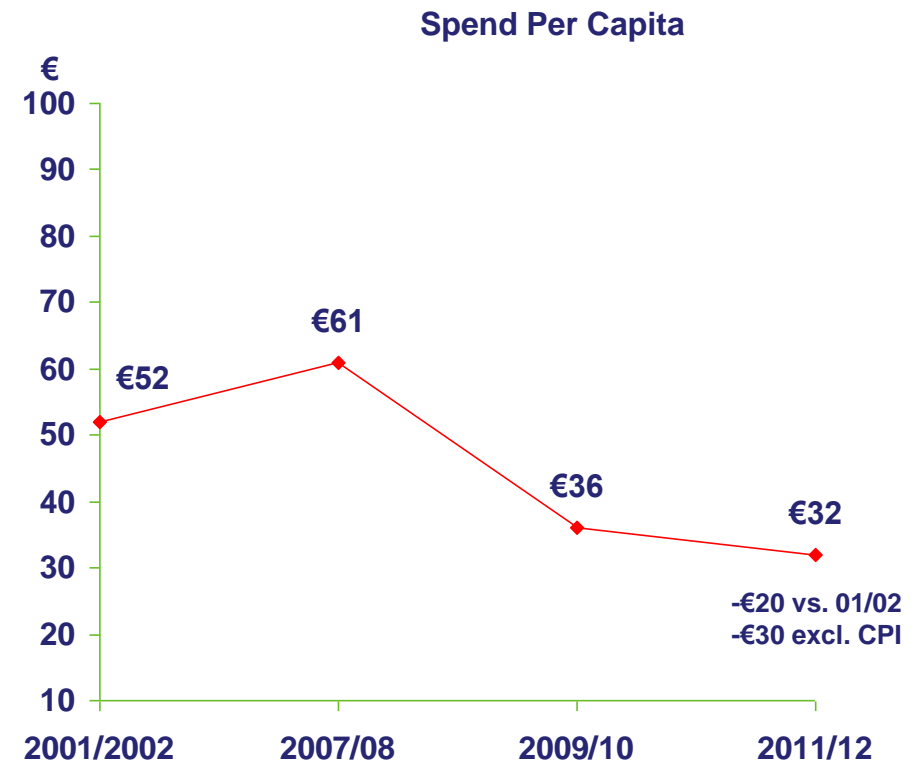
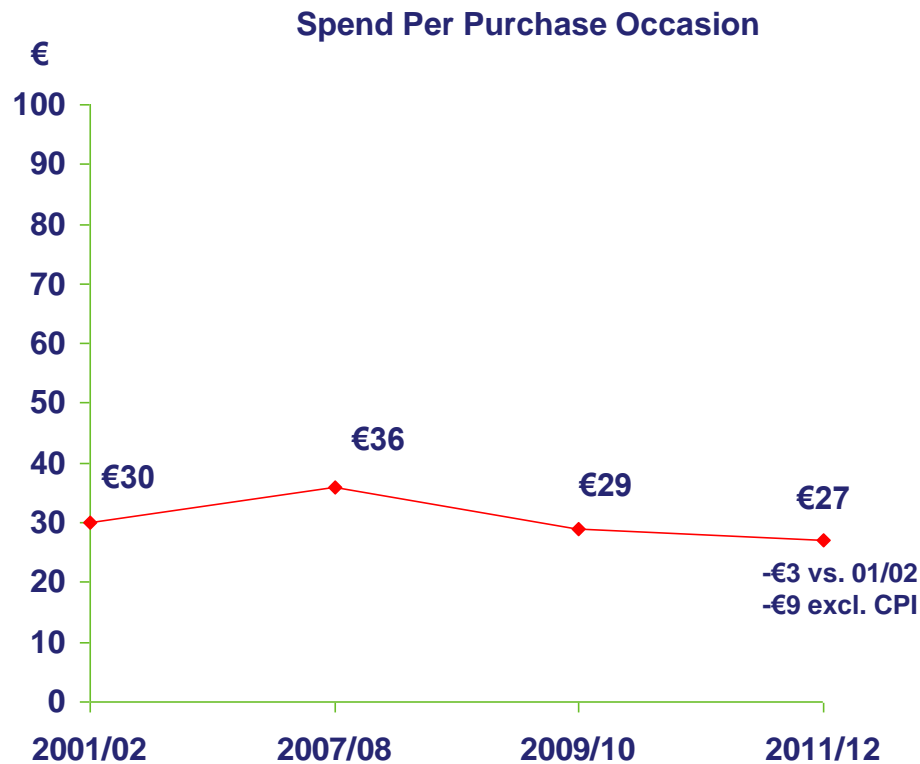
- The outdoor and flowering plants market is worth €112m – down 28% since first measured in 2001. Accounting for inflationary changes over this period, real contraction in the market is more like 39%.
- However, there has been long term sustained growth in value in two products – hanging baskets/pre-planted containers (+67%) and herbs, fruit and vegetables for planting (+77%). 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 80% since 2001/02, which is driving the market (spend per purchase occasion has actually dropped slightly). On the other hand, with herbs/fruit and vegetables, it has been an increased spend per purchase occasion which has primarily driven up the market value; though purchasing occasions have increased by 14%.
- A combined spend on trees, shrubs and hedges had expanded significantly between 2005 and 2007; however, the market has declined substantially since then, correlating with the sharp reduction in new housing completions and other economic changes.
- There were one fifth fewer purchases of outdoor and flowering plants made in 2011/12, compared with 2001/02, despite an increase in population of the same proportion during this period.
- In contrast, there has been a relatively more modest fall in the spend by consumers on each purchase occasion (-€3), suggesting that it is the decline in activity which has been mainly responsible in the fall in market value.
- Independent garden centres’ value share has fallen below 50% for the first time since measurement began ten years ago. Discounters are continuing to make in-roads across all products.

Summary Of Outdoor And Flowering Plants Market



Market value stands at €112m, down 28% since 01/02, but only by €14m in the past two years. Purchase occasions have fallen 19% since 01/02, despite an increase in the population of 18% over this period.

Summary Of Outdoor And Flowering Plants Market



Per capita occasions down 32%

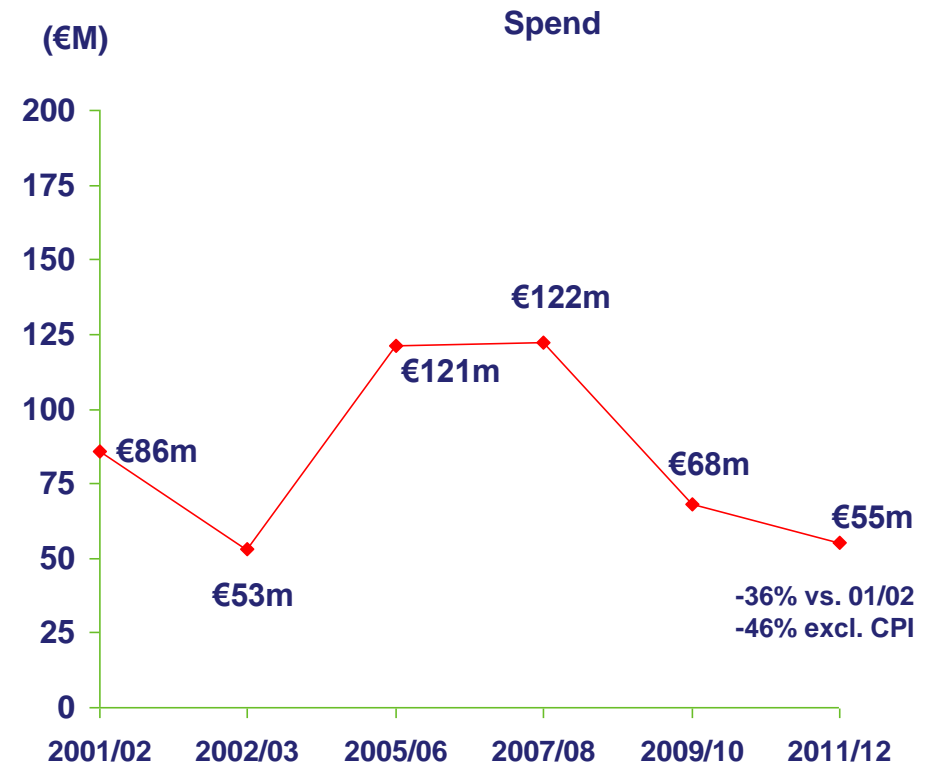
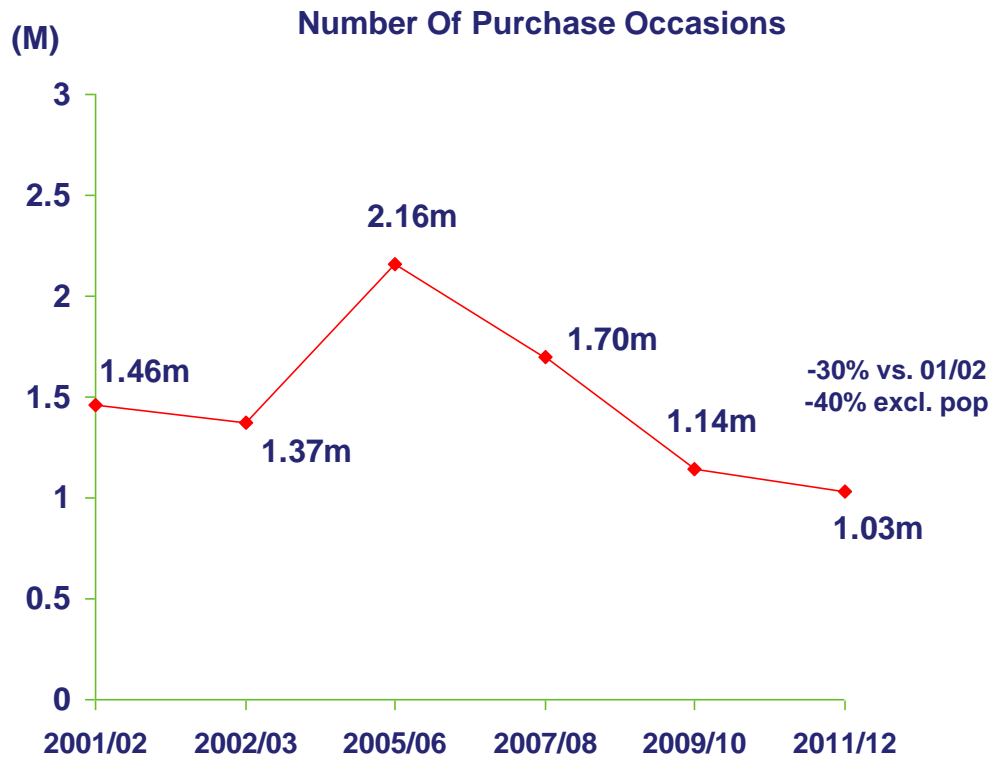
Spend per purchase occasion has dropped by €3, but taking inflationary changes into account, this equates to an €9 decline.

Breakdown Of Value Of Outdoor And Flowering Plants

	2001/ 2002	2002/ 2003	2005/ 2006	2007/ 2008	2009/ 2010	2011/ 2012	% growth (01/02 vs. 11/12)	% underlying growth
	€m	€m	€m	€m	€m	€m		
Total	155	110	217	208	126	112	-28	-39%
Hanging baskets/outdoor containers	9	11	19	29	15	15	+67	+36%
Bulbs/seeds for planting	18	15	22	19	13	13	-27	-38%
Trees	34	15	47	61	23	33	-3	-18%
Shrubs/hedges	39	29	45	40	33	14	-64	-69%
Flowering plants	32	20	n/a	n/a	n/a	n/a	n/a	n/a
Bedding plants	n/a	4	39	23	16	15	n/a	n/a
Herbaceous plants	n/a	2	10	10	8	5	n/a	n/a
Herbs/fruit/vegetables	9	7	16	15	14	16	+77	+45%
Other outdoor plants	11	7	19	11	4	3	-73	-77%

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.

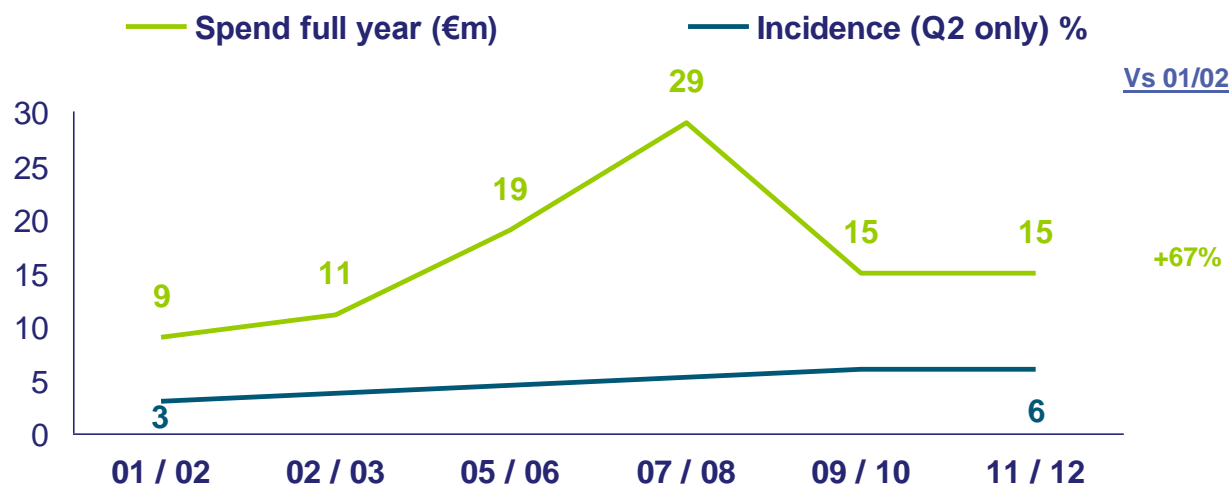
Trees/Shrubs/Hedges/Herbaceous & Other Outdoor Plants*



Purchase of and spend on outdoor plants and trees/shrubs and hedges has contracted by a third over the past ten years. Purchasing and expenditure peaked coinciding with the height of the housing boom in 2005/06.

* Other outdoor plants includes ornamental grasses, bamboo, ferns, water plants

Hanging Baskets & Pre-Planted Containers

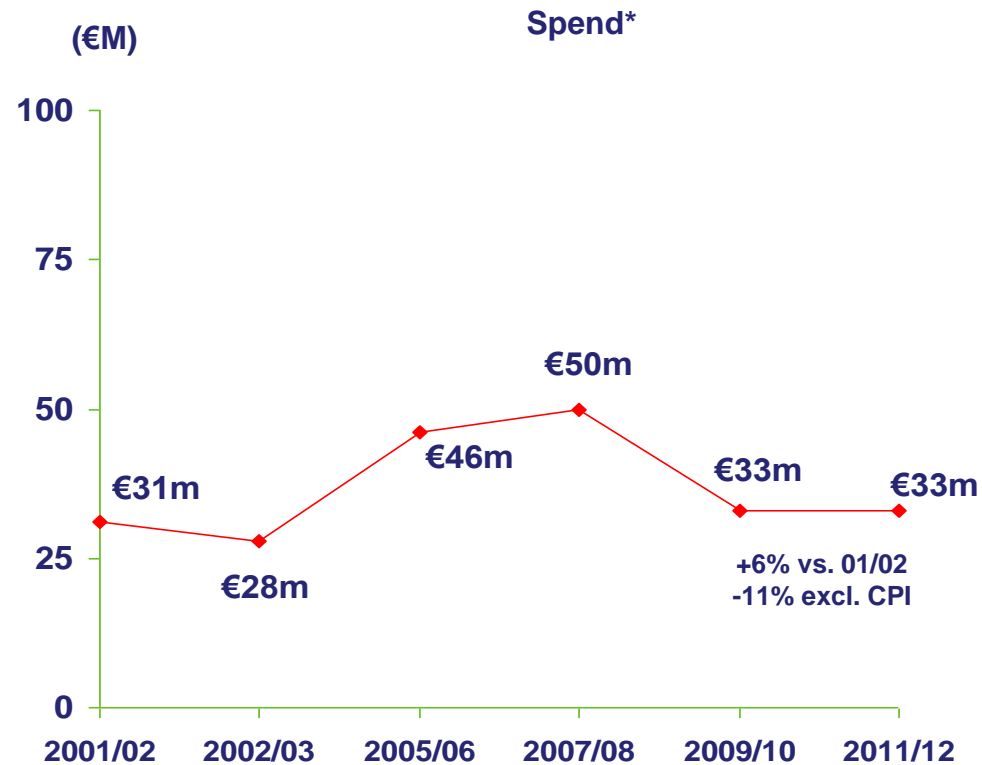
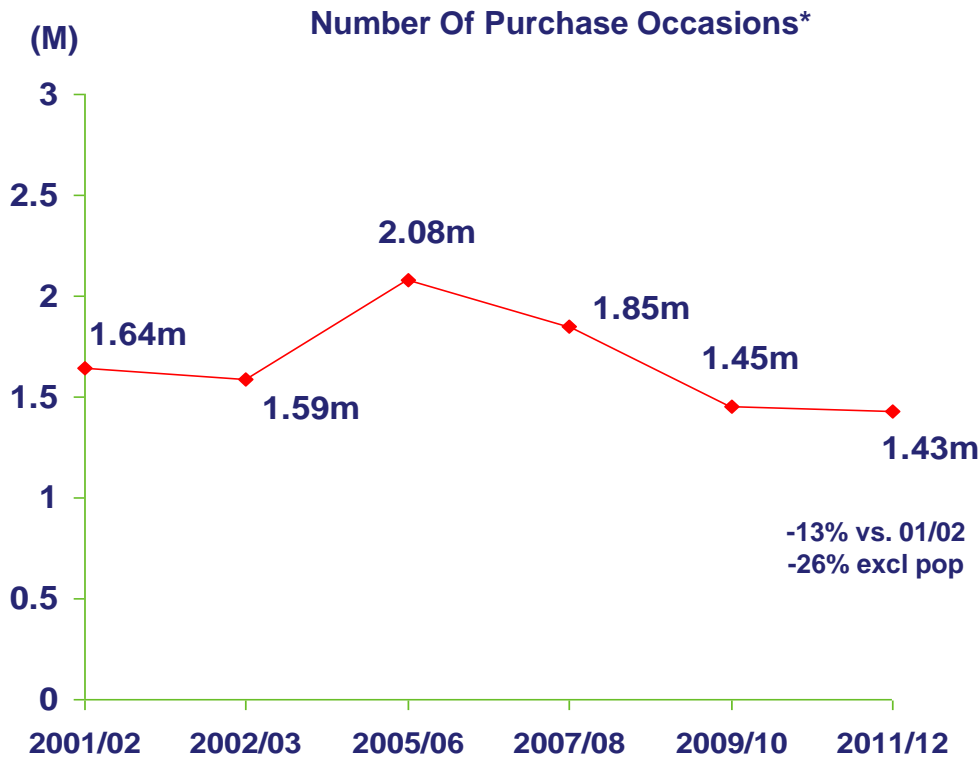


Product Summary

- Hanging baskets/pre-planted containers have grown in value by 67% since '01/'02. Spend levels have held steady since 2009/10.
- The incidence of purchasing this category (comparing April-June figures only) has doubled in the past ten years.
- Likewise, purchasing occasions have grown by 80%, outstripping by some way, the growth in population.
- Spend per purchase occasion stands at €28, suggesting it is the greater number of purchasing occasions which is driving the market.

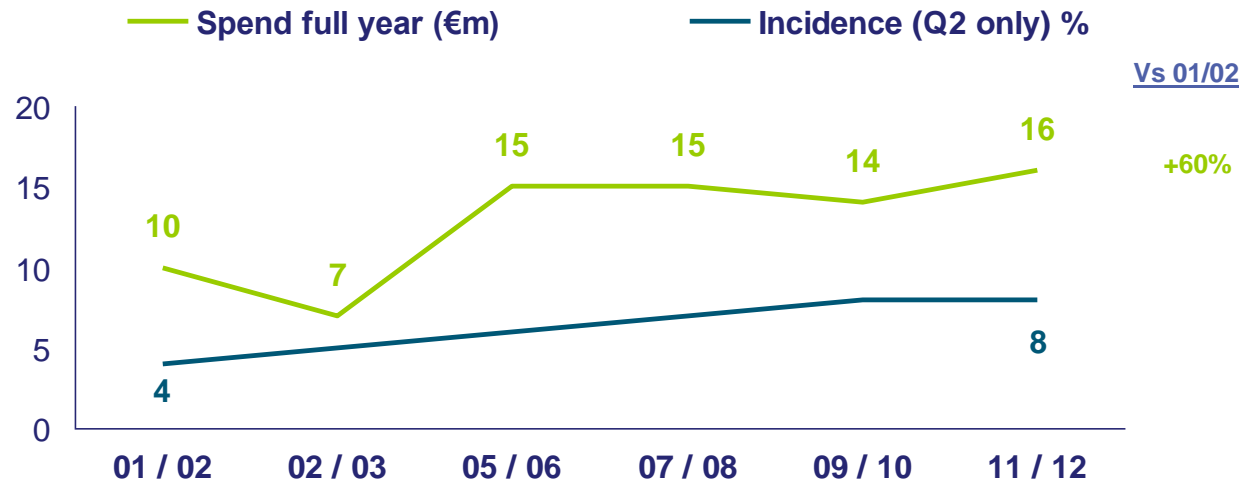
Occasions (m)	0.30	0.47	0.60	0.75	0.51	0.54	+80%
Per capita occasions	0.1	0.16	0.19	0.22	0.15	0.15	+50%
Spend per purchase occasion	€30	€23	€32	€38	€29	€28	(-€2) -1%
Spend per capita	€3.04	€3.65	€5.90	€8.53	€4.25	€4.27	(+€1.23) +40%
Individual Population (15+)	2.963m	3.017m	3.218m	3.398m	3.526m	3.511m	+18%

Pre-Planted Plants (Indoor & Outdoor)



The market for pre-planted plants (indoor and outdoor) has increased by 6% since 2001/02; however there appears to be a trend towards outdoor pre-planted pots, and away from indoor potted plants. Spend on outdoor products has increased by 67% in the past 10 years, but spend on indoor has declined by almost a fifth over the same period.

Herbs/Fruit & Vegetables For Planting



Product Summary

- The incidence of buying herbs/fruit and vegetables for planting (based on April-June comparisons) has doubled since 2001.
- Spend is up 60% to €16m. 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 third 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.

Occasions (m)	0.81	0.59	0.89	0.97	0.92	0.92	+14%
Per capita occasions	0.27	0.20	0.28	0.29	0.26	0.26	-4%
Spend per purchase occasion	€12	€12	€17	€15	€15	€17	(+€5) +42%
Spend per capita	€3.37	€2.32	€4.66	€4.41	€3.97	€4.56	(+€1.19) +35%
Individual Population (15+)	2.963m	3.017m	3.218m	3.398m	3.526m	3.511m	+18%

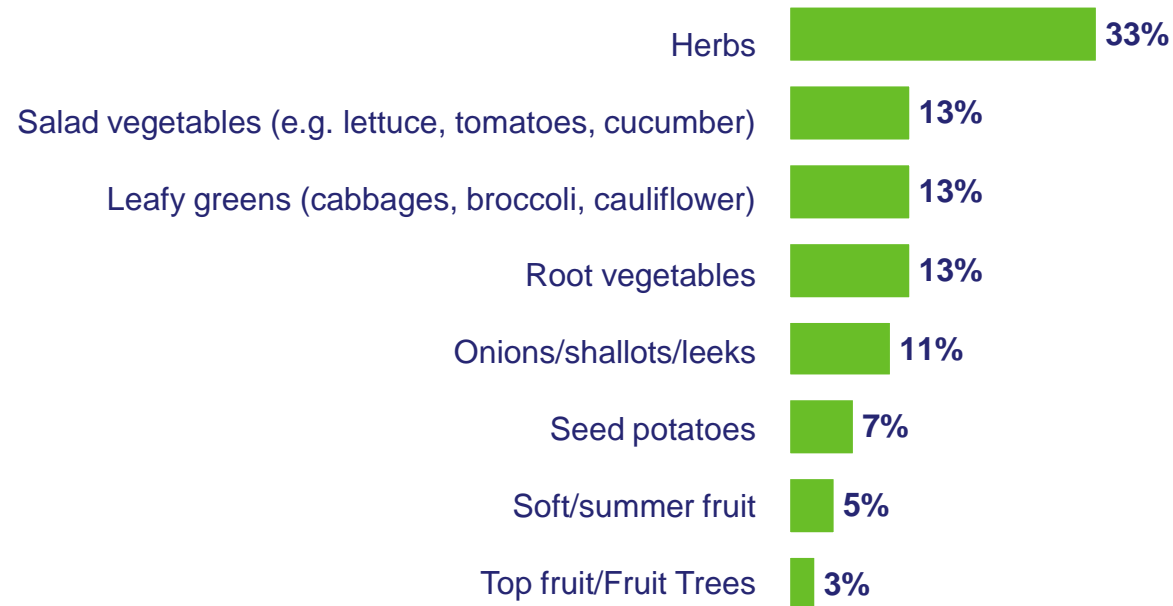
Grow Your Own Market Summary

Incidence of purchasing herbs/fruit and vegetables for planting  5%

Value of market €16m (+77%)

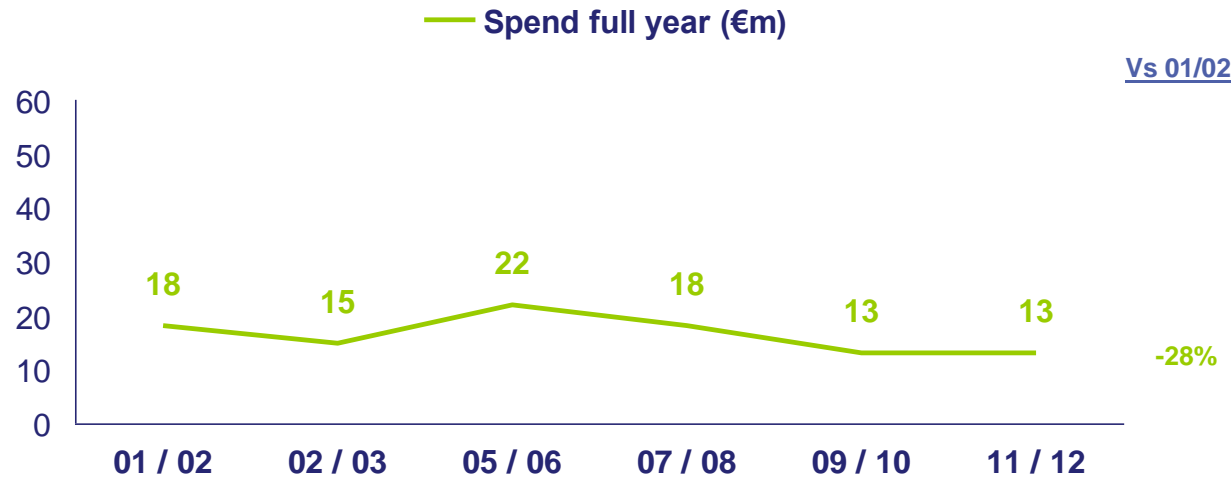
Purchasing occasions .92m (+14%)

Main products purchased



Herbs, followed by salad vegetables, leafy greens and root veg, are the most commonly purchased products for planting.

Bulbs/Seeds For Planting

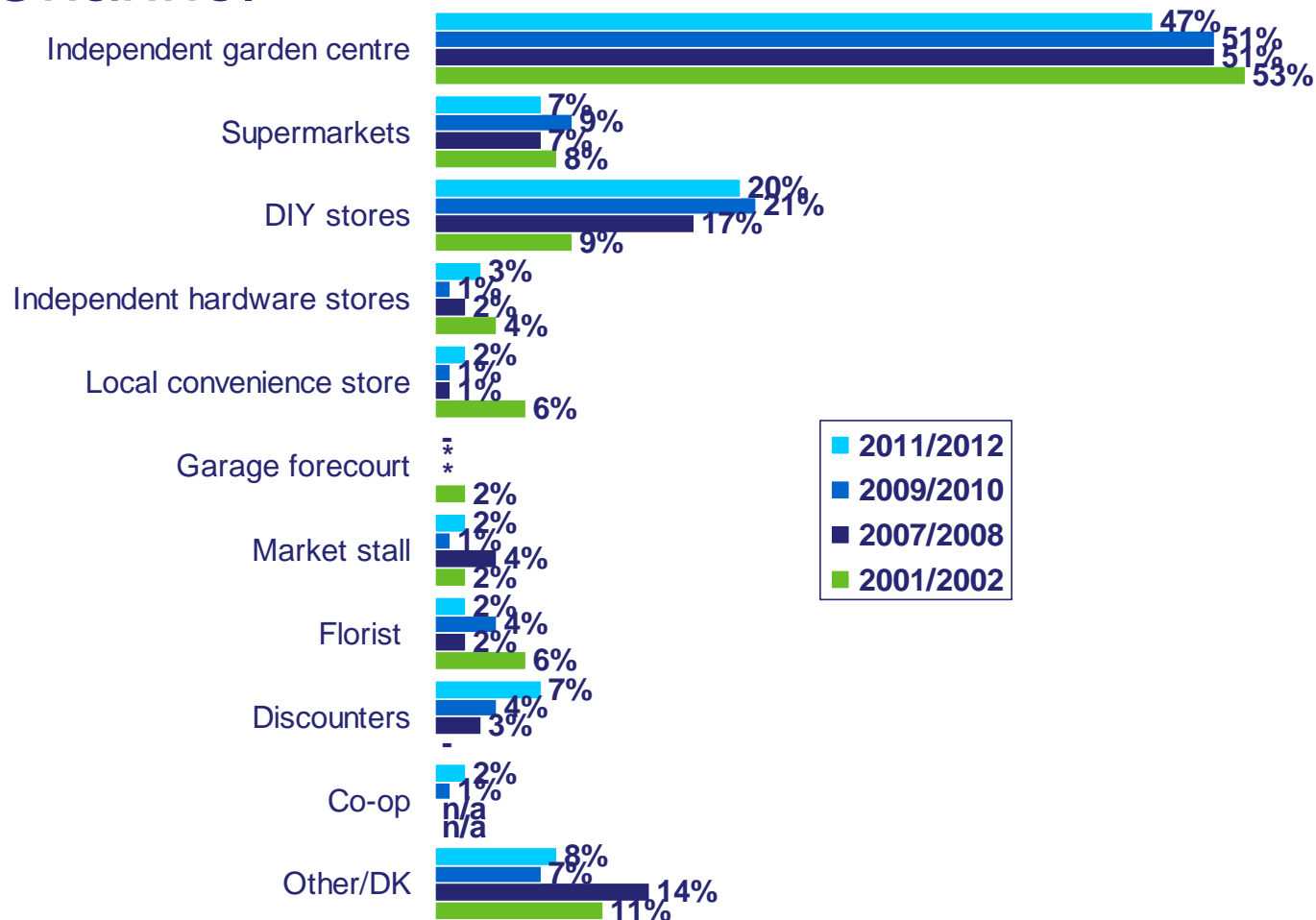


Product Summary

- Spend on bulbs and seeds for planting has fallen by 28% since 01/02. While purchasing occasions have also contracted quite substantially in the context of the growth of the population, the market value is also being affected by lower prices being paid on each purchasing occasion.

Occasions (m)	1.1	1.07	1.29	1.16	0.97	0.86	-22%
Per capita occasions	0.37	0.35	0.40	0.34	0.28	0.24	-35%
Spend per purchase occasion	€16	€14	€17	€15	€13	€15	(-€1.00) -6%
Spend per capita	€6.07	€4.97	€6.84	€5.30	€3.69	€3.70	(-€2.37) -39%
Individual Population (15+)	2.963m	3.017m	3.218m	3.398m	3.526m	3.511m	+18%

Value Market Share For Outdoor And Flowering Plants X Channel



While independent garden centres account for just under half of all spend, discounters' share is increasing steadily, albeit at a relatively low level.

Channels For Outdoor And Flowering Plants: 2011/2012 X 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	31	28	27	49	45	31	31	24	41
Supermarket	14	12	15	6	4	11	13	23	8
DIY stores	24	29	24	11	24	31	24	18	28
Independent hardware store	3	3	5	2	4	3	2	3	-
Local convenience store	2	3	1	2	1	2	*	3	-
Co-op	2	1	3	4	4	2	*	3	3
Market stalls	3	2	1	2	2	2	4	4	-
Florist	2	5	2	1	3	2	4	1	-
Discounters	14	12	17	11	11	12	16	15	8
Others	5	5	5	12	2	4	6	6	12

Garden centres attract the largest share of purchases of trees, shrubs and herbaceous plants. Discounters are taking increasing share across all products, particularly bulbs/seeds, trees and herbaceous plants, typically anchor products of the independent garden centre.

Indoor Potted Plants

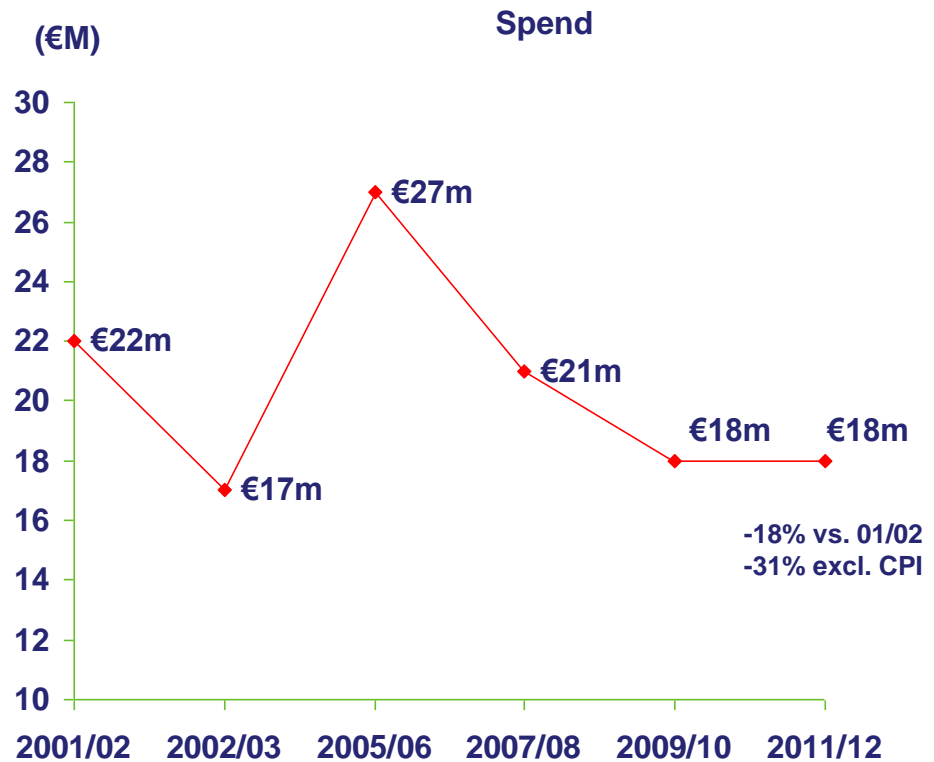
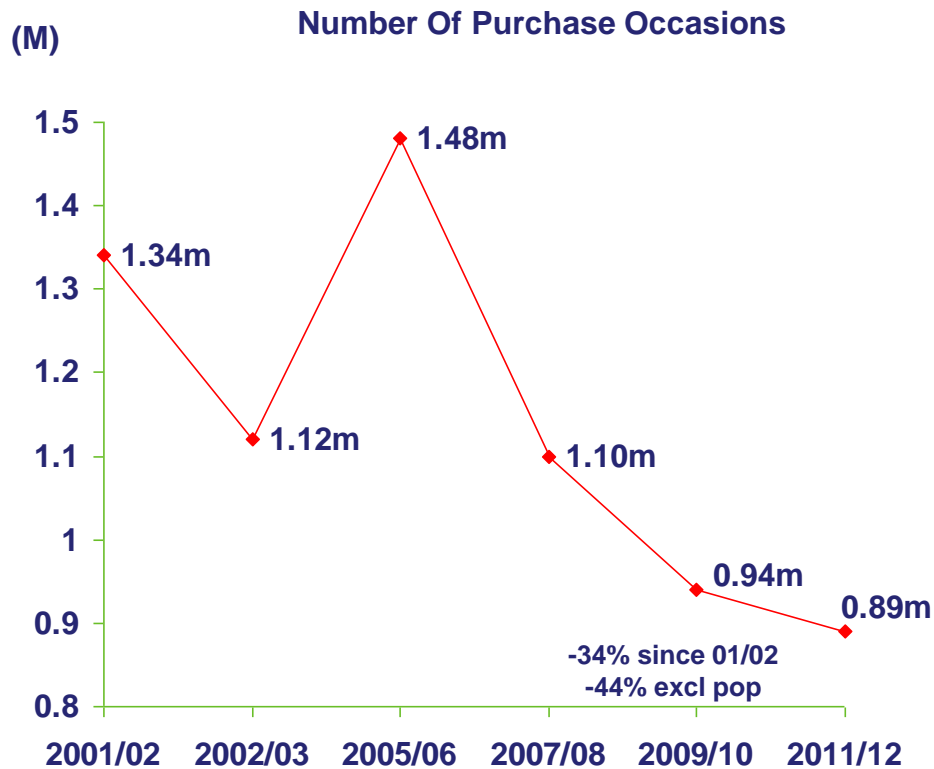
Indoor Potted Plants

- Definition includes:
 - Indoor potted plants (e.g. orchids, geraniums, spider plants, primroses, fig plants, cordyline)

Indoor Potted Plants – Summary

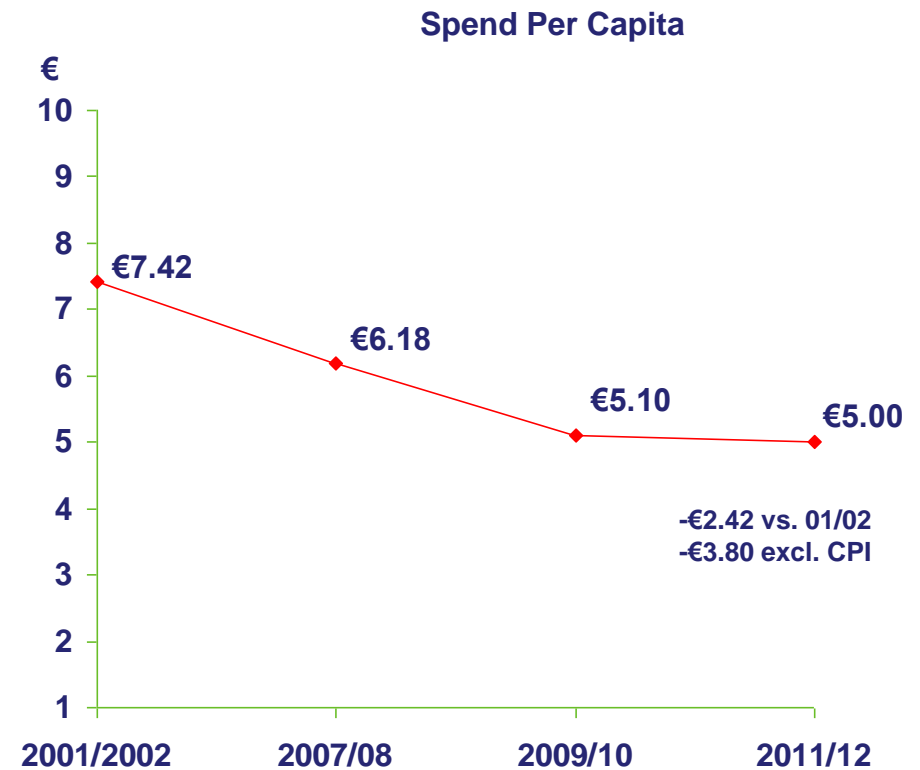
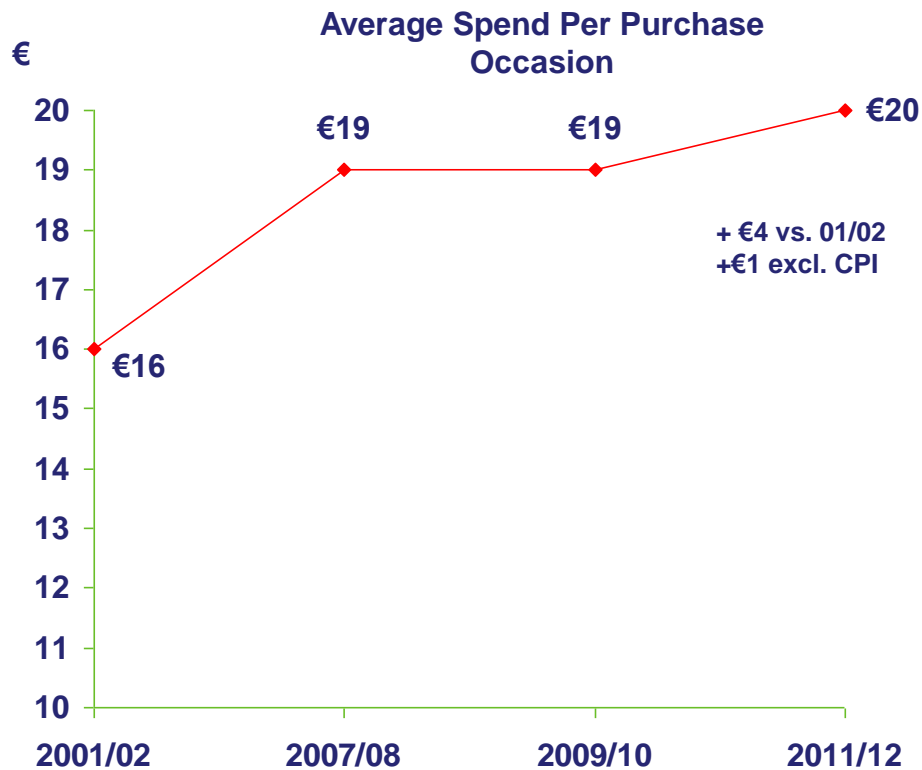
- The value of the indoor potted plants market has fallen by 18% since 2001/02. When taking inflationary increases into account, the market has in fact, contracted by 31%. However, the market value has remained steady (at €18m) since 2009/10.
- Since 2001/2002, purchasing occasions have declined from 1.34m to 0.89m, down 34% in eight years.
- Average spend per purchase has risen from €16 to €20 over this period, which is helping sustain the value of this category. Per Capita Spend, however, has dropped by more than €2.
- Over 4 in 10 purchases of indoor potted plans are made through supermarkets and discounters, compared with a fifth through independent garden centres.
- A quarter of all purchases of indoor potted plans are gift related, up from 18% in 2007/08. purchasing for the home seems to be declining slowly.

Purchase Of Indoor Potted Plants – Summary



Purchasing occasions of indoor plants have declined by 34% since 01/02, though the market value has only fallen by half this level – suggesting that fall in value has been driven by reduced purchasing activity.

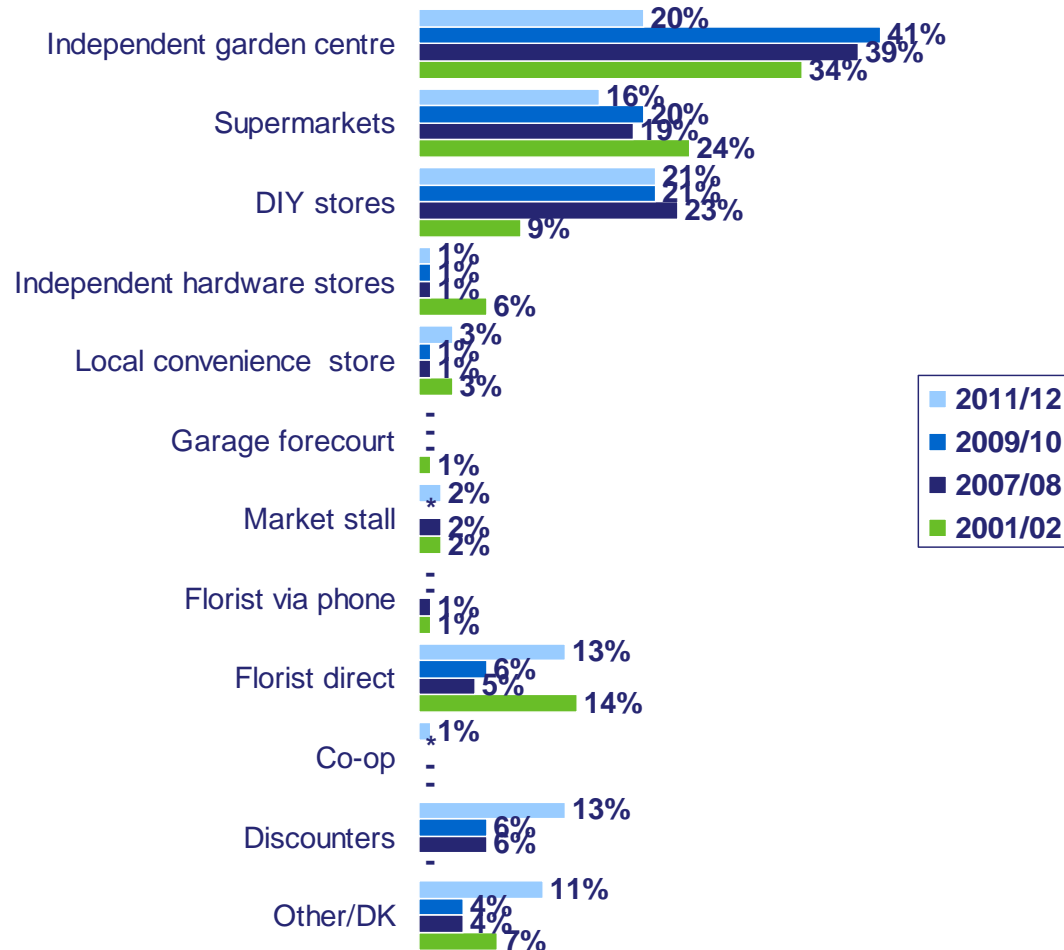
Purchase Of Indoor Potted Plants – Summary



Per capita occasions down 44%

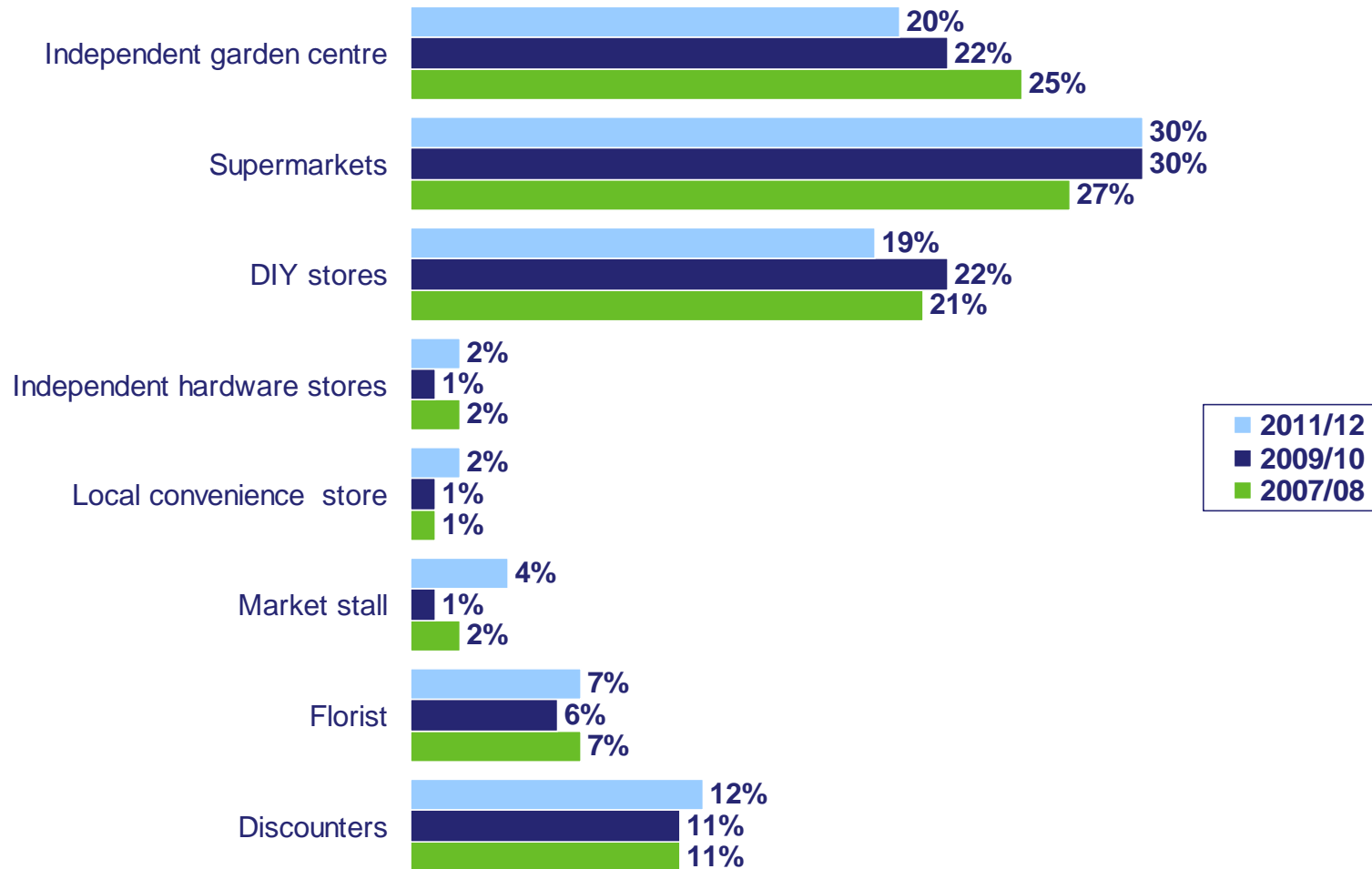
Average spend per purchase occasion has remained steady since 07/08, and is actually up by €4 over the longer term.

Value Market Share For Indoor Potted Plants X Channel

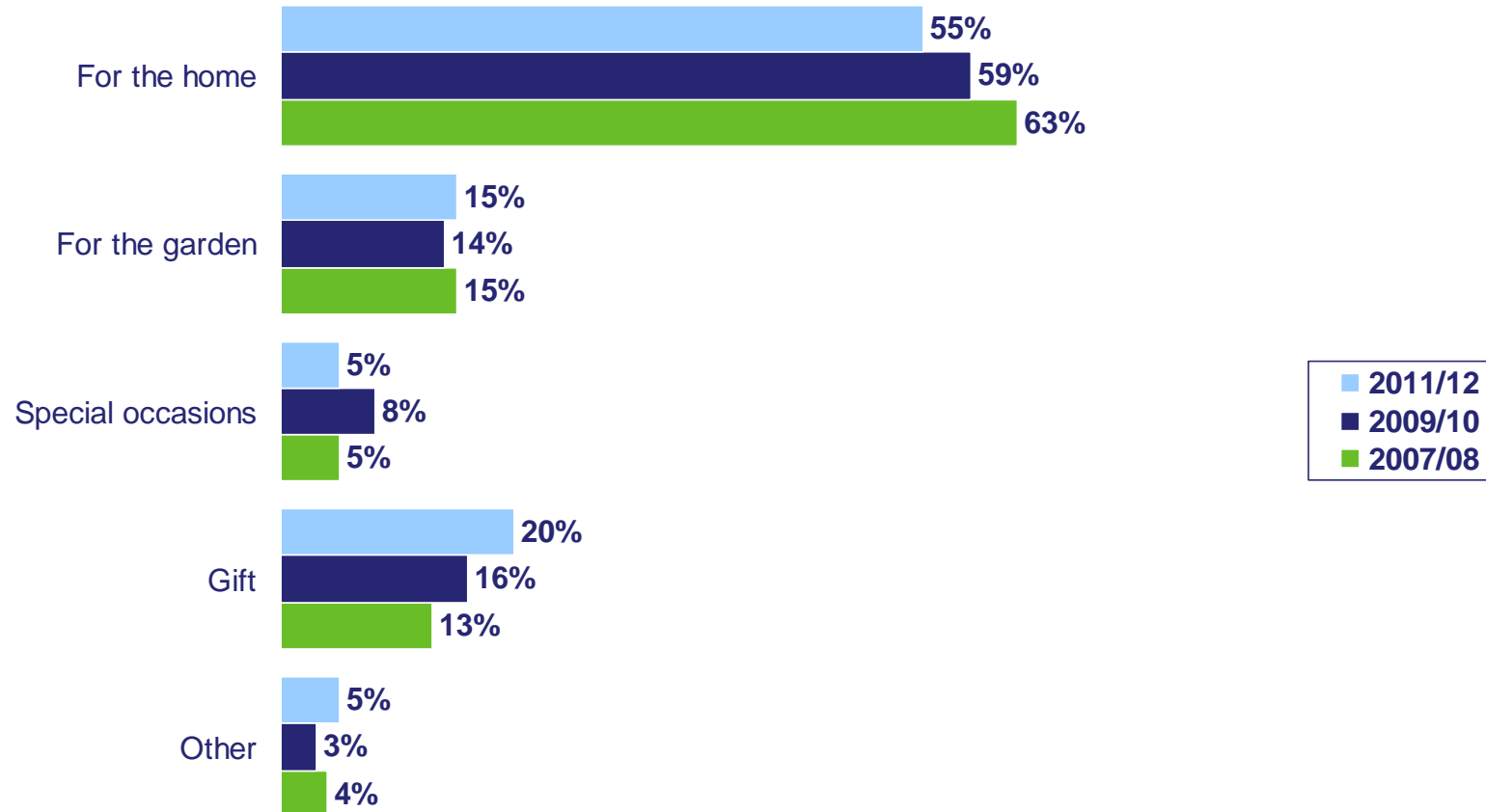


20% of market value is through independent garden centres; supermarkets and discounters account for 29% of spend.

Channels For Indoor Potted Plants 2011/2012 (Purchase Occasion Based)



Motivation For Purchase: Indoor Potted Plants 2011/2012 (Purchase Occasion Based)



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

Fresh Cut Flowers

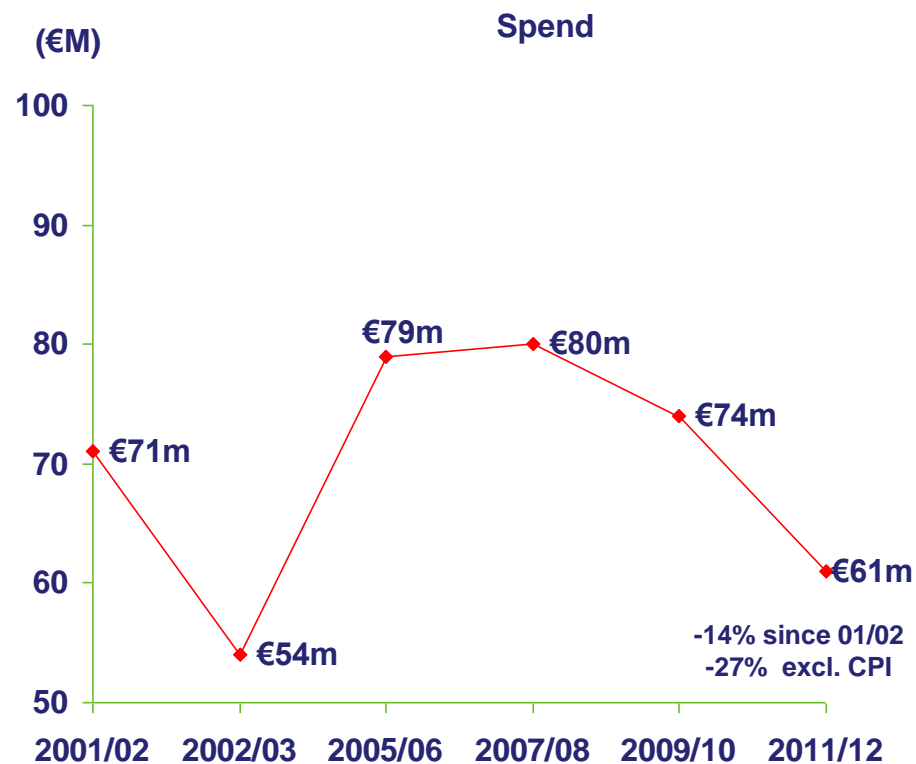
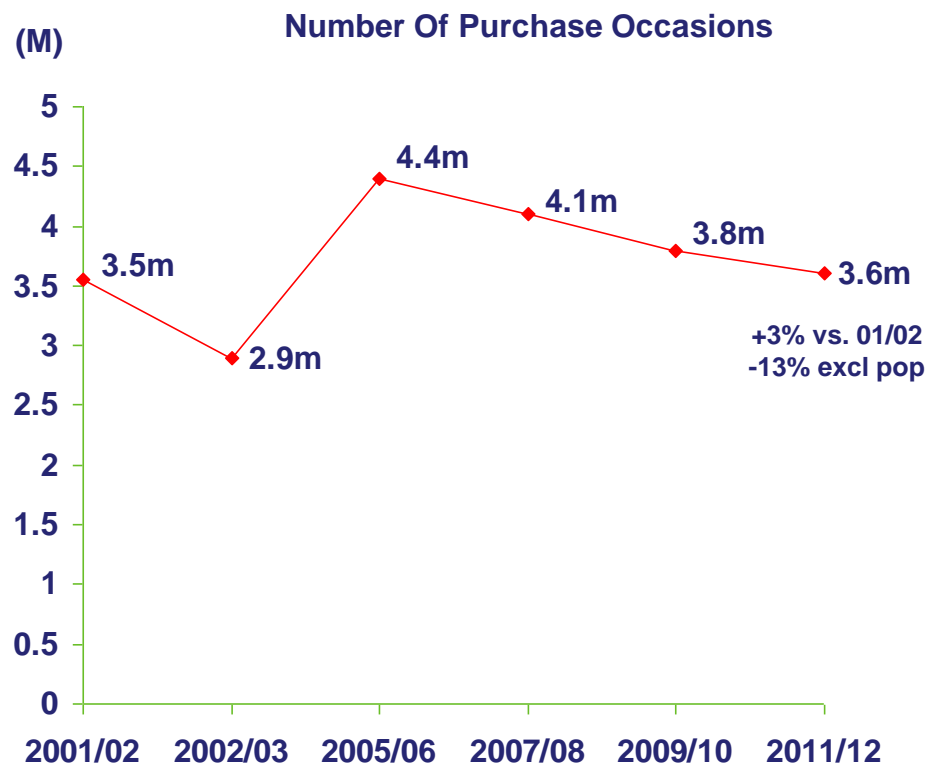
Fresh Cut Flowers Category

- Definition includes:
 - Fresh cut flowers
 - Wreaths
 - Foliage

Fresh Cut Flowers And Wreaths - Summary

- The incidence of past week purchasing of cut flowers has fallen marginally year on year since 2005/06.
- Fresh cut flowers and wreaths are worth €61m – the majority of which is comprised by fresh cut flowers (€50m). In absolute terms, the market has contracted by 14% since 2001/02 (-27% in real terms).
- The number of purchasing occasions of products in this category has risen marginally from 3.5m to 3.6m in this period - an increase of 3%, but per capita occasions are down 13%. Purchasing occasions of fresh cut flowers are back to 2001/02 levels; while spend has actually fallen by a fifth, suggesting reasonable activity levels within this product area.
- The average spend per purchase occasion has dropped to its lowest level (€15) for fresh cut flowers. This would reflect the increase in share taken by discounters in this market (share up 41% since 2007/08).

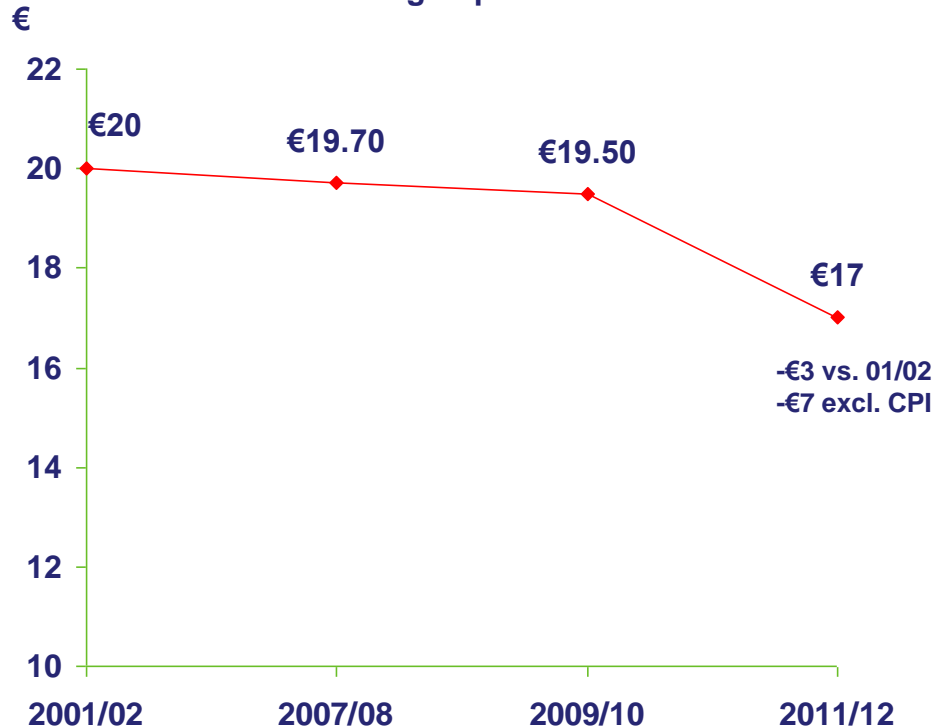
Purchase Of Fresh Cut Flowers And Wreaths – Summary



Purchasing of fresh cut flowers and wreaths has increased by 3% since 2001/02, though occasions are still down from the last survey. Spend has actually declined by 14% in ten years.

Purchase Of Fresh Cut Flowers And Wreaths – Summary

Average Spend Per Purchase



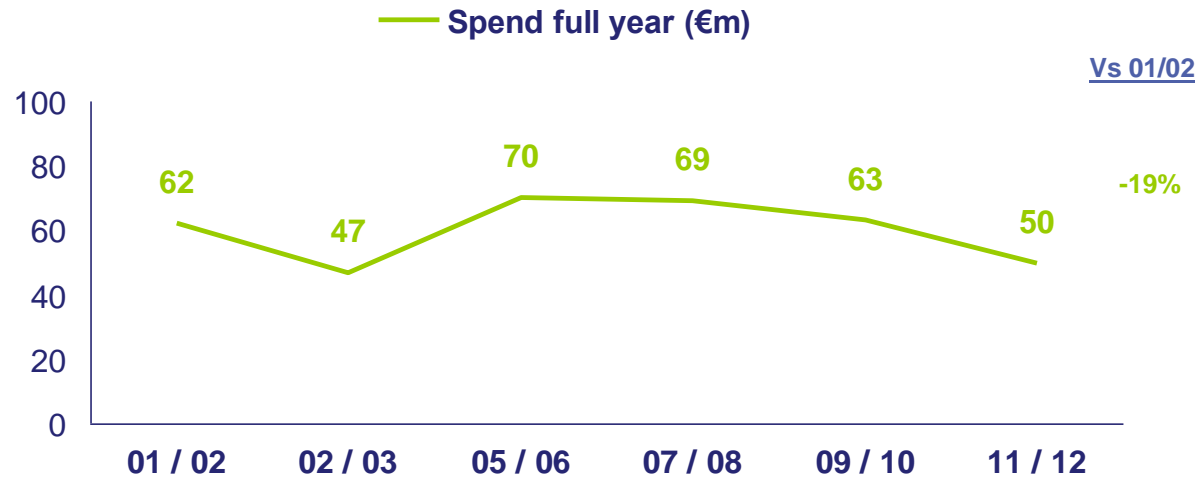
Per Capita Spend



Per capita occasions down 13%

Average spend per occasion has fallen by €3 since 01/02; however, spend per head of population has contracted by €7.

Fresh Cut Flowers

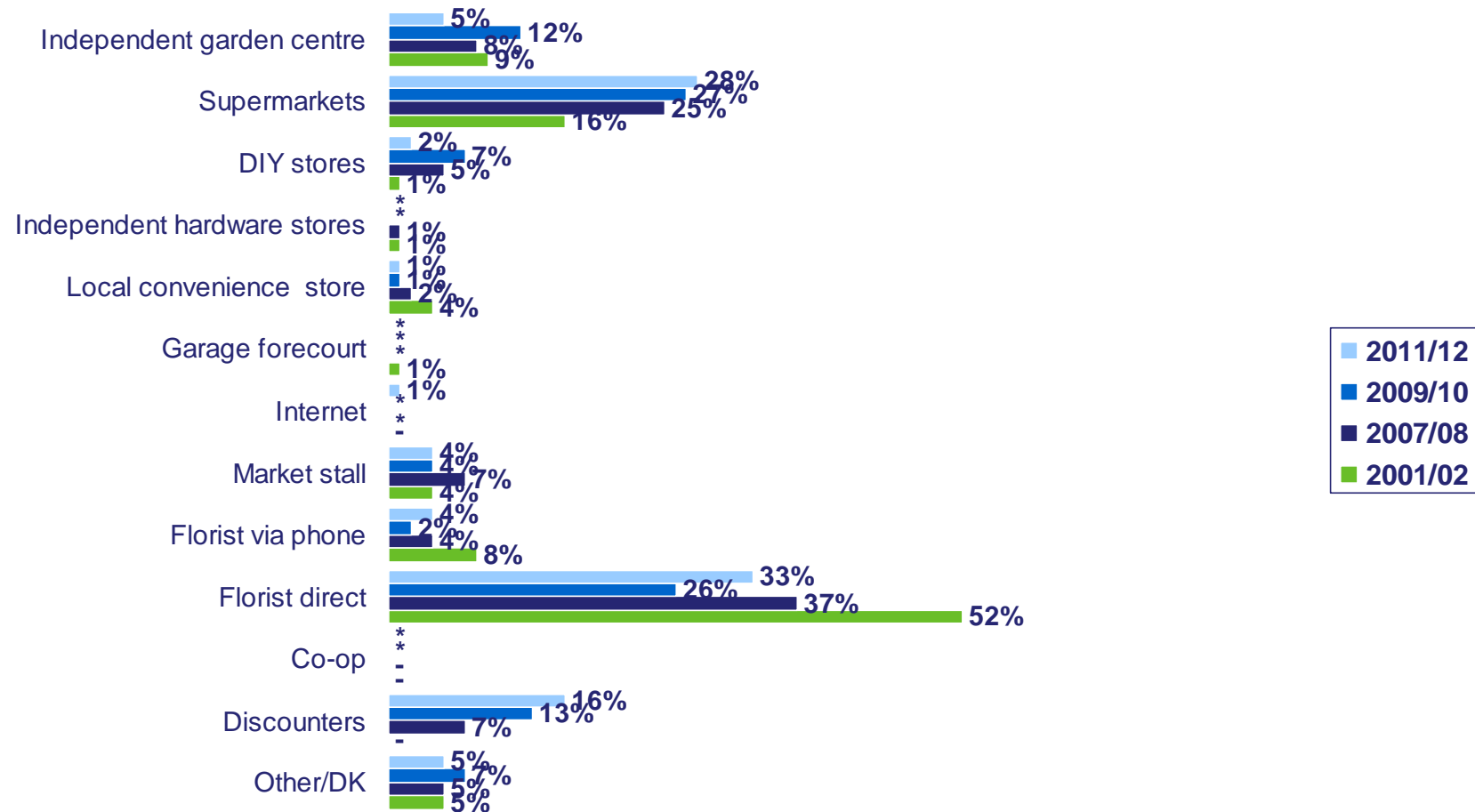


Product Summary

- Value of Fresh Cut Flowers market has contracted by a fifth since 2001, and indeed, since the last measure.
- The number of purchasing occasions has remained relatively stable, though not at pace with the growth in population.
- Spend per purchase occasion has shown short-term decline so it is sustained purchasing activity which is driving the market.

Occasions (m)	3.3	2.7	4.2	3.7	3.4	3.3	=
Per capita occasions	1.11	0.89	1.31	1.09	0.96	0.94	-15%
Spend per purchase occasion	€18.56	€17.27	€16.84	€18.60	€18.53	€15.15	-18%
Spend per capita	€20.59	€15.58	€21.75	€20.31	€17.86	€14.24	(-€6.35) -31%
Individual Population (15+)	2.963m	3.017m	3.218m	3.398m	3.526m	3.511m	+18%

Value Market Share For Fresh Cut Flowers And Wreaths X Channel



Florists are under significant pressure, as further inroads are made by discounters. Half of all spend on fresh cut flowers is channelled through supermarkets and discounters, compared with just 34% through florists.

Channels For Fresh Cut Flowers & Wreaths: 2011/2012 (Purchase Occasion Based)

	Fresh Cut Flowers			Wreaths		
	11/12	09/10	07/08	11/12	09/10	07/08
	%	%	%	%	%	%
Independent garden centre	3	2	3	10	7	12
Supermarket	37	39	43	11	12	11
DIY stores	1	1	1	6	5	7
Local convenience store	1	1	2	1	3	3
Garage forecourt	*	1	1	-	-	-
Market stalls	4	3	3	4	-	5
Florist via phone	1	1	1	3	3	9
Florist direct	20	22	26	38	65	42
Discounters	24	20	17	5	2	-
M&S	4	3	5	-	-	-
Others	5	7	4	22	3	12

61% of all purchases of cut flowers are made through supermarkets/discounters.

Motivation For Purchase – Fresh Cut Flowers & Wreaths: 2011/2012 (Purchase Occasion Based)

	Fresh Cut Flowers			Wreaths		
	11/12	09/10	07/08	11/12	09/10	07/08
	%	%	%	%	%	%
For the home	40	40	44	10	7	15
For the garden	1	1	1	5	1	9
Special occasion (birthday, Valentines etc.)	19	23	20	61	80	63
Gift	35	34	32	16	7	12
Other	5	2	3	8	5	1

54% 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.

Garden Products

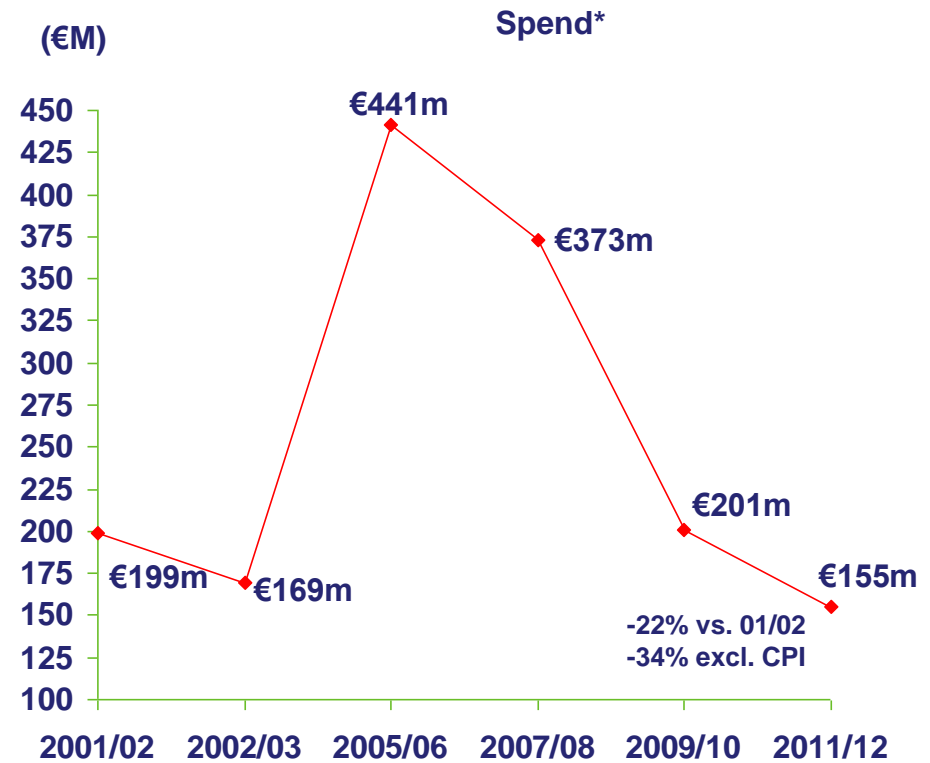
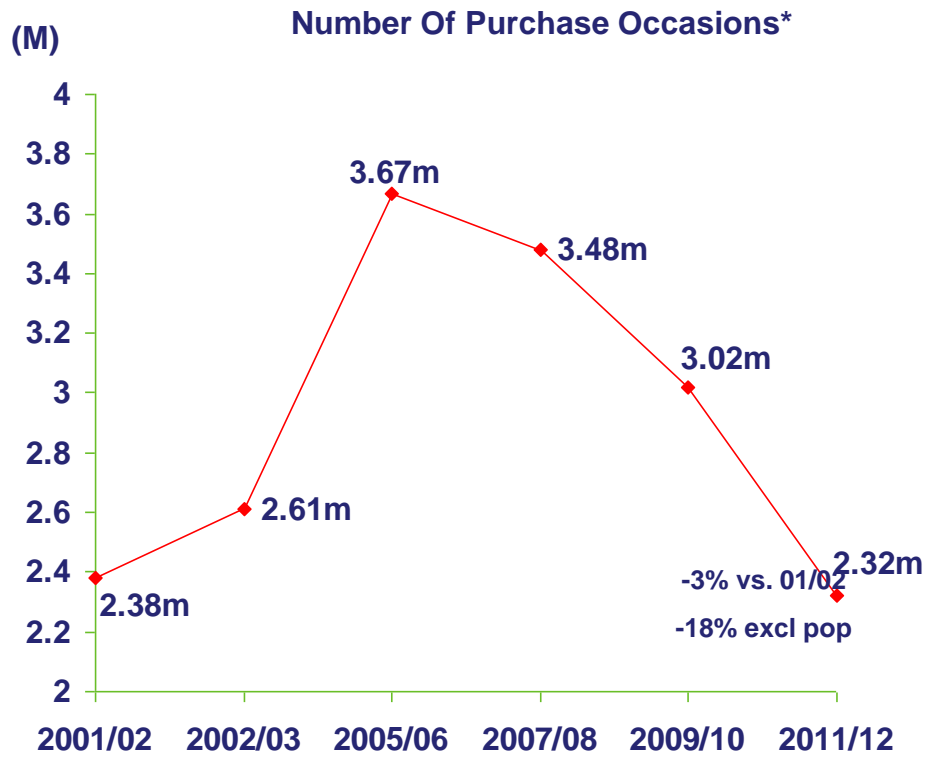
Garden Products Category

- 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, trimmers, lawn mowers)
 - Garden structures (incl. Sheds, glass houses, lean-to's, pergolas, tunnels, cloches)
 - Garden trellising, fences
 - Other hard landscaping products (sleepers, bricks etc.) new 2007.
- N.B. New definition of garden structures/trellising/fencing in 2011 – see introduction

Garden Products – Summary

- The definition of the garden products sector has expanded since 2001 (four categories have been added since 2001), and this year there has been a change in definition to garden structures/trellising.
- Excluding these additional categories, the garden products market has fallen in value from €199m to €155m since 2001 (-22%). Taking inflationary changes into account, the market has contracted by a third over this period.
- The additional categories are worth an additional €63m to the sector bringing the total value of this category to €218m as currently measured.
- Interestingly, the dynamics in this sector 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 is more limited. Garden treatment and BBQ equipment have sustained long term value, but the trend in decking appears to have passed.
- The number of purchase occasions have reverted to 2001/02 levels. There has been a sharp decline in purchasing of garden products since 2009/10 (-23%).
- Independent garden centres account for 12% of spend in this category – half its share compared with ten years ago. DIY stores continue to hold the greatest share of purchase occasions (32%).

Purchase Of Garden Products – Summary*

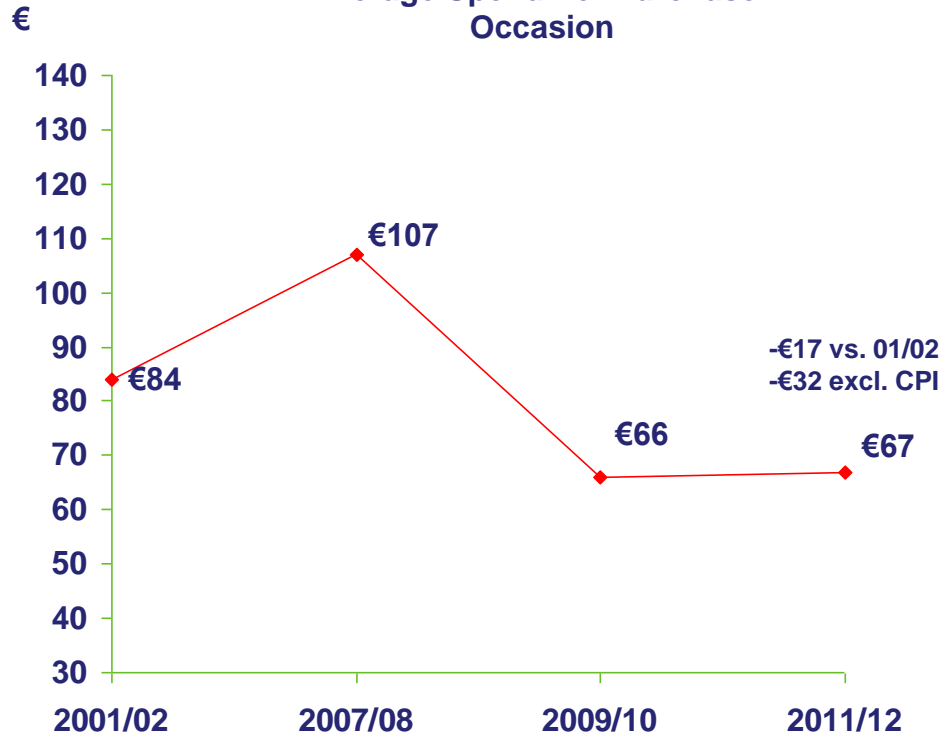


*Comparable categories only

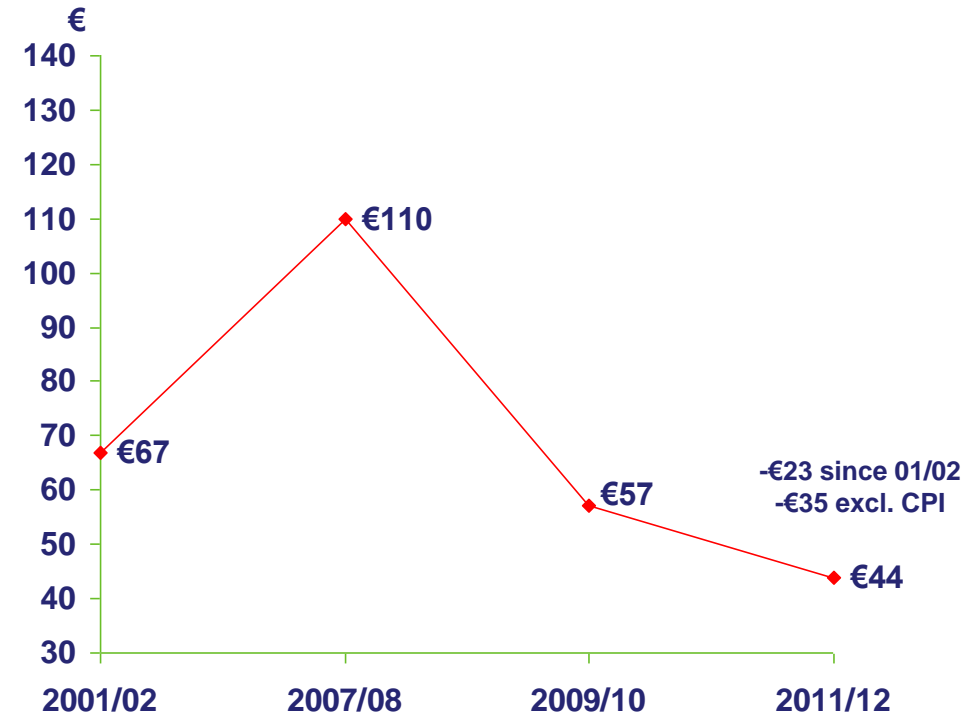
Purchasing of garden products has reverted to 2001/02 levels, and occasions have dropped back markedly since 05/06. Spend on garden products is at its lowest level. Pressure on prices, and changes in individual purchasing patterns are impacting on the market value.

Purchase Of Garden Products – Summary*

Average Spend Per Purchase*
Occasion



Per Capita Spend*

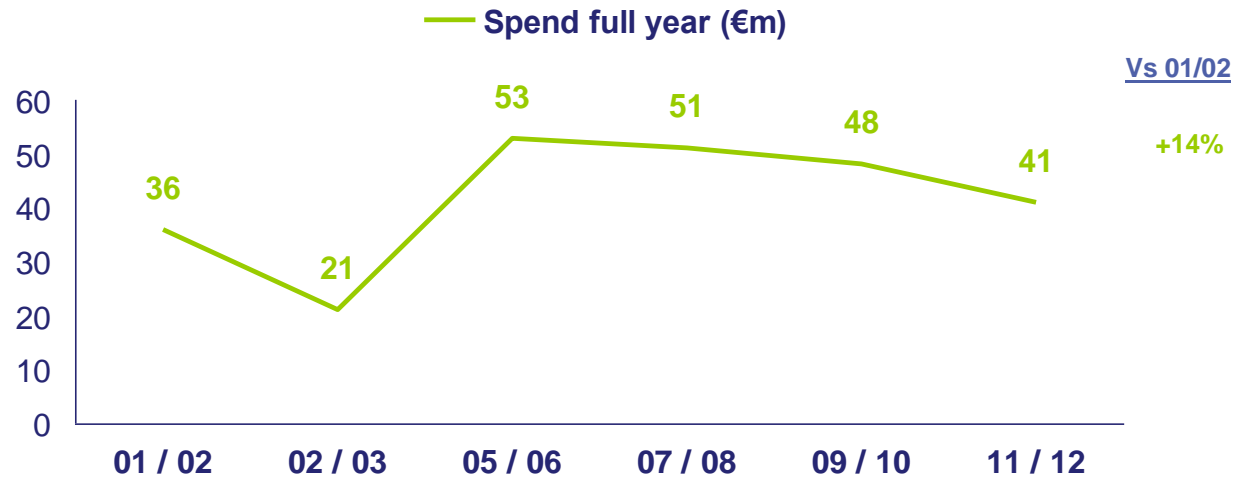


*Comparable categories only

Per capita occasions down 18%

Average spend per purchase occasion has fallen back by a fifth (€17). Purchasing occasions relative to the population have declined by 18%, while per capita spend has contracted over this period by €35.

Garden Treatment & Peat/Bark/Soil Treatment

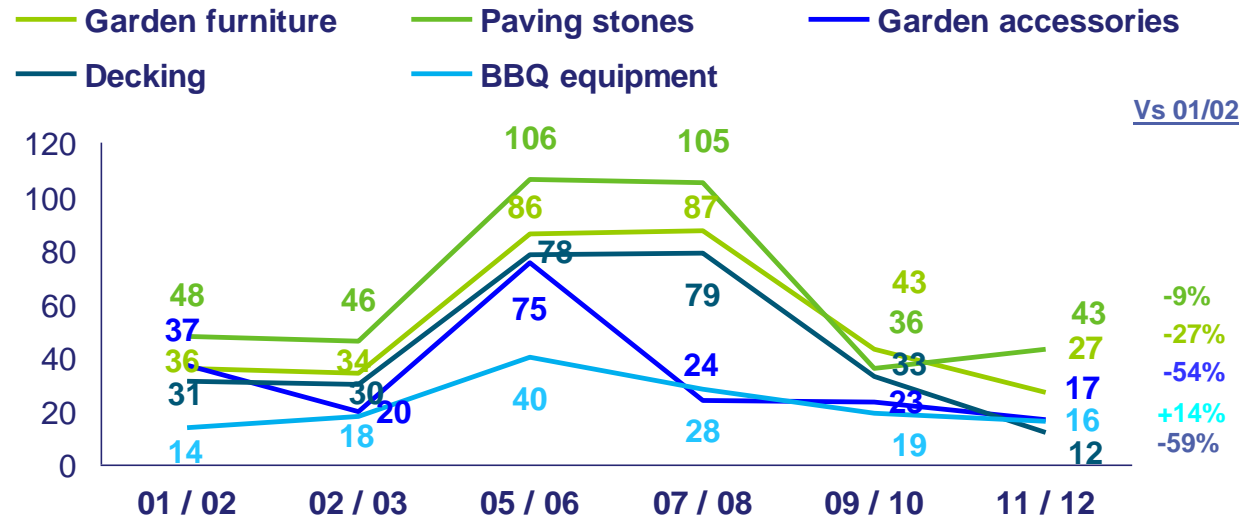


Product Summary

- Spend on traditional garden treatment products is valued at €41m, an increase of 14% since 2001/02.
- Purchasing occasions have also grown (+7%). Spend per purchase occasion has remained static.

Occasions (m)	1.31	1.25	1.89	1.89	1.74	1.40	+7%
Per capita occasions	0.44	0.41	0.59	0.56	0.49	0.40	-10%
Spend per purchase occasion	€27	€17	€28	€27	€28	€29	(+€2) +7%
Spend per capita	€12.15	€6.96	€16.47	€15.00	€13.61	€11.68	(-€0.47) -4%
Individual Population (15+)	2.963m	3.017m	3.218m	3.398m	3.526m	3.511m	+18%

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, and are back to 2002 levels.
- In the long term, BBQ and paving stone values have been most resilient, while spend in decking and furniture has declined.
- Overall, activity in garden infrastructure has reverted to 2001 levels, while spend has fallen by almost a third.

Occasions (m)	0.99	1.03	1.85	1.68	1.28	0.92	-7%
Per capita occasions	0.33	0.34	0.57	0.49	0.36	0.26	-21%
Spend per purchase occasion	€167	€144	€208	€192	€120	€167	(=)
Spend per capita	€56	€49	€120	€95	€44	€33	(-€23) -41%
Individual Population (15+)	2.963m	3.017m	3.218m	3.398m	3.526m	3.511m	+18%

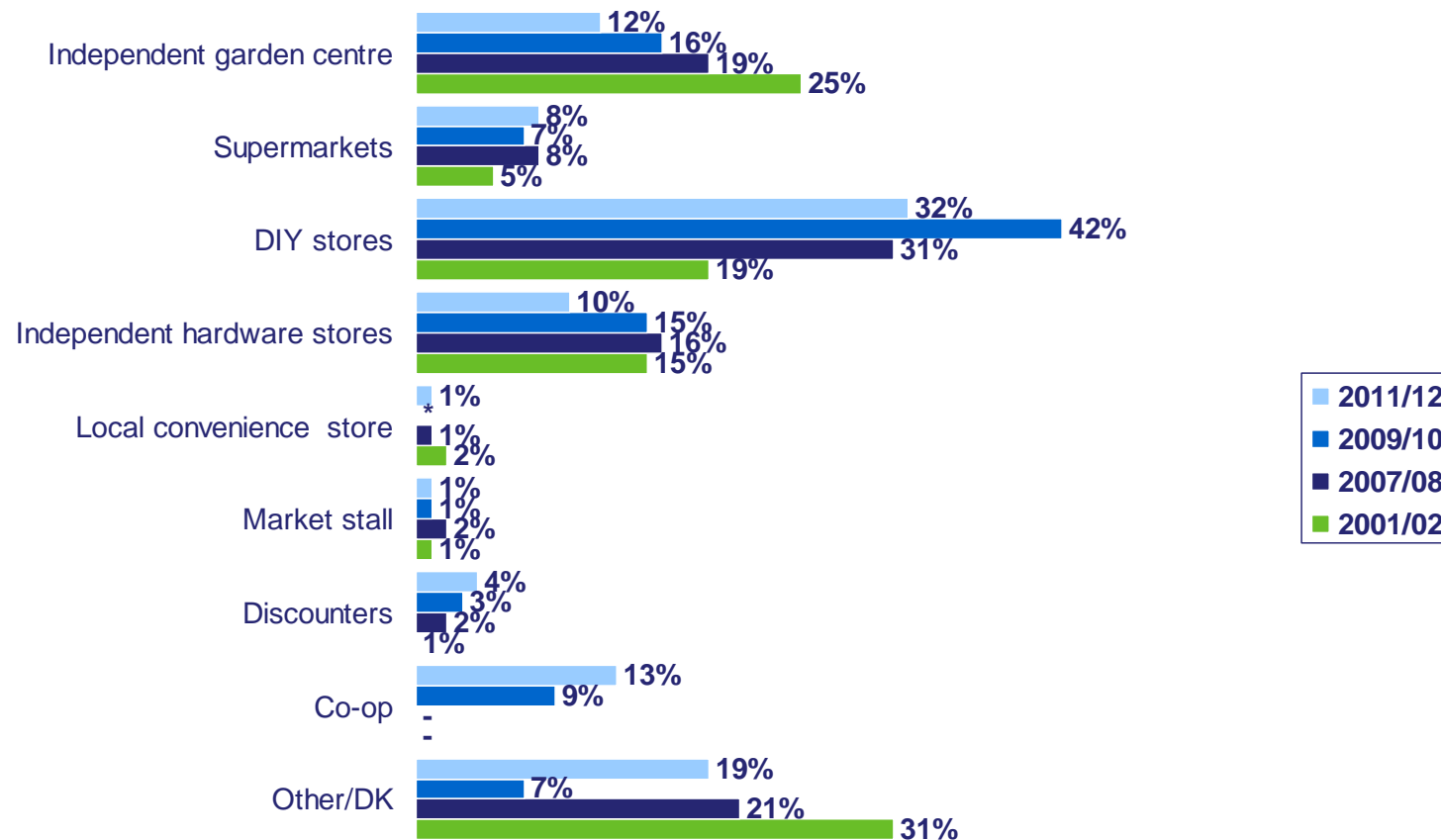
* Including garden accessories, furniture, paving, decking, BBQ

Average Spend Per Purchase Occasion

	2005/2006	2007/2008	2009/2010	2011/2012
• Garden treatment	€32	€25	€28	€33
• Peat/bark/soil treatment	€29	€28	€27	€25
• Garden accessories	€109	€53	€55	€54
• Paving/decorative stones	€353	€354	€178	€260
• Decking	€780	€709	€464	€343
• BBQ equipment	€100	€82	€57	€63
• Garden furniture	€215	€240	€165	€179
• Gardening tools/equip.	€71	€82	€87	€68
• Gardening structures	€410	€385	€658	€80
• Garden trellising/fences	€220	€177	€172	€261
• Other hard landscaping products	n/a	€344	€156	€156

Spend per occasion on garden products is largely similar to 2009/10; indeed average spend on paving/decorative stones has increased, while average spend on decking has declined.

Value Market Share For Garden Products X Channel



The DIY dominates this market with 32% of spend. Independent Co-ops account for 13% of value. Independent garden centres' share is contracting.

* Excludes landscaping and new categories

Channels For Garden Products X Category: 2011/2012 (Purchase Occasion Based)

	Total Category	Garden treat- ment	Peat/ bark/soil treatment	Garden access- ories	Paving/ Decora- tive stones	Decking	BBQ equip- ment	Garden furniture	Garden- ing tools/ equipment	Gardening structures	Garden Trellising /fences	Other hard land- scaping
	%	%	%	%	%	%	%	%	%	%	%	%
Independent garden centre	20	22	28	19	37	10	1	6	14	15	24	13
Supermarket	10	10	6	8	5	13	34	9	4	7	-	12
DIY stores	36	34	32	39	24	35	37	48	35	57	33	29
Independent hardware store	9	9	6	4	13	19	3	4	15	7	14	17
Local convenience store	2	1	3	3	*	-	2	1	1	-	2	7
Local Co-op	6	10	4	4	2	-	3	9	7	7	10	6
Discounters	7	5	11	8	2	-	8	6	12	2	3	-
Others	10	6	10	15	17	23	12	17	12	5	14	16

DIY stores have about half the garden furniture and garden structures market, while independent garden centres' relative strength is in garden structures, garden treatment and paving/decorative stones..

Landscaping Services

Landscaping Services – Summary

	Spend			Occasions			Average spend per occasion		
	07/08	09/10	11/12	07/08	09/10	11/12	07/08	09/10	11/12
	€m	€m	€m	€m	€m	€m	€m	€m	€m
Total market	176	144	97	0.671	0.689	.558	263	208	174
Garden designer	52	47	23	0.06	0.087	.047	875	543	489
Garden maintenance	38	42	38	0.414	0.437	.395	91	97	96
Garden makeover	64	33	18	0.087	0.072	.05	733	461	360
Tree Surgeon	22	21	18	0.110	0.093	.066	203	224	273

The landscaping market is worth €97m as measured by consumer spend. Spend is spread across maintenance and more specific design/makeover requirements, though 7 in 10 of 'occasions' related to maintenance. Spend on garden design and makeovers is significantly reduced since 2009/10.

Garden Market Purchasing 2011/2012

Growing the success of Irish food & horticulture

Bord Bia
Irish Food Board