Gardening Market Survey
Full Year 2023
Management Report

February 2024

BORD BIA Thinking House

Introduction

Background & Objectives

- Ipsos B&A has been tracking consumer activity and spend in the gardening market since 2001. The objective of the survey is to provide Bord Bia with a tool to measure and track consumer spend, channel of purchase and motivation for purchase across a range of gardening products and services.
- The amenity sector in this survey covers the following items:
- Outdoor and flowering plants: hanging baskets and pre-planted containers, bulbs/flower seeds for planting, trees/hedges, shrubs, bedding plants, herbaceous plants, and herbs, fruit and vegetables for growing yourself.
- Indoor potted plants
- Fresh cut flowers (including foliage and wreaths)
- Garden products: garden treatment (e.g.: fertilizer, pesticides), peat/bark/soil treatment, garden accessories, paving, decorative stones and gravel, decking, BBQ equipment, garden furniture, gardening tools and equipment, garden structures for growing in, other garden structures, and other items such as sleepers and bricks for building in the garden).
- Landscaping services: Garden designer, full garden makeover, garden maintenance and tree surgery.

Key Findings

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Key Findings

- After an unprecedented spike in activity and spend in the Gardening Market sector during Covid, habits have largely returned to pre-Covid times. However, even in the context of a high inflation economy in 2023, the market has experienced real growth since 2018, suggesting that our heightened focus on our outdoor spaces during Covid has left a lasting legacy on our attitudes towards our gardens.
- All categories recorded growth in spend compared with 2018; the most noteworthy shift being in the landscaping services area, which grew in popularity since Covid.
- Within the outdoor and flowering plants category, considerable long-term growth is particularly evident for bulbs/flower seeds and herbs, fruit and vegetables for planting out.
- The popularity of indoor potted plants, while down from the significant spend levels during Covid, has also remained robust, experiencing a 17% growth in spend since the 2018 measure. Furthermore, there is a shift in the reasons for purchasing – 30% choosing to buy for special occasions, gifts or other reasons compared with for the home. This also aligns with the shift in spend profile over the past decade, from being concentrated among older females, to now being popular across a broad spectrum of the population.

Key Findings

- In contrast, while spend on fresh cut flowers is ahead of 2018 levels, purchasing occasions are down. At the height of Covid, cut flowers were a rare source of pleasure. Perhaps in an era of high inflation and cost of living pressures, choosing to spend on such a discretionary item is less attractive. Furthermore, the sustained popularity of indoor potted plants is no doubt considered a real and potentially better value proposition.

- Investment in garden products more than doubled during Covid, driven by the "homebody" movement, where consumers focused their attention and income on their outdoor spaces, for a variety of reasons, whether for remote working, cultivating, retreating or relaxing. Not surprisingly, spend on some of these items is not expected to be repeated regularly, so it is reasonable to expect the market to have contracted. However, there is still plenty of disposable income being funneled into garden products: and the market value has increased 17% since 2018. Falls in once-off spend on paving, decking and structures has been offset by investment in garden furniture and tools/equipment.

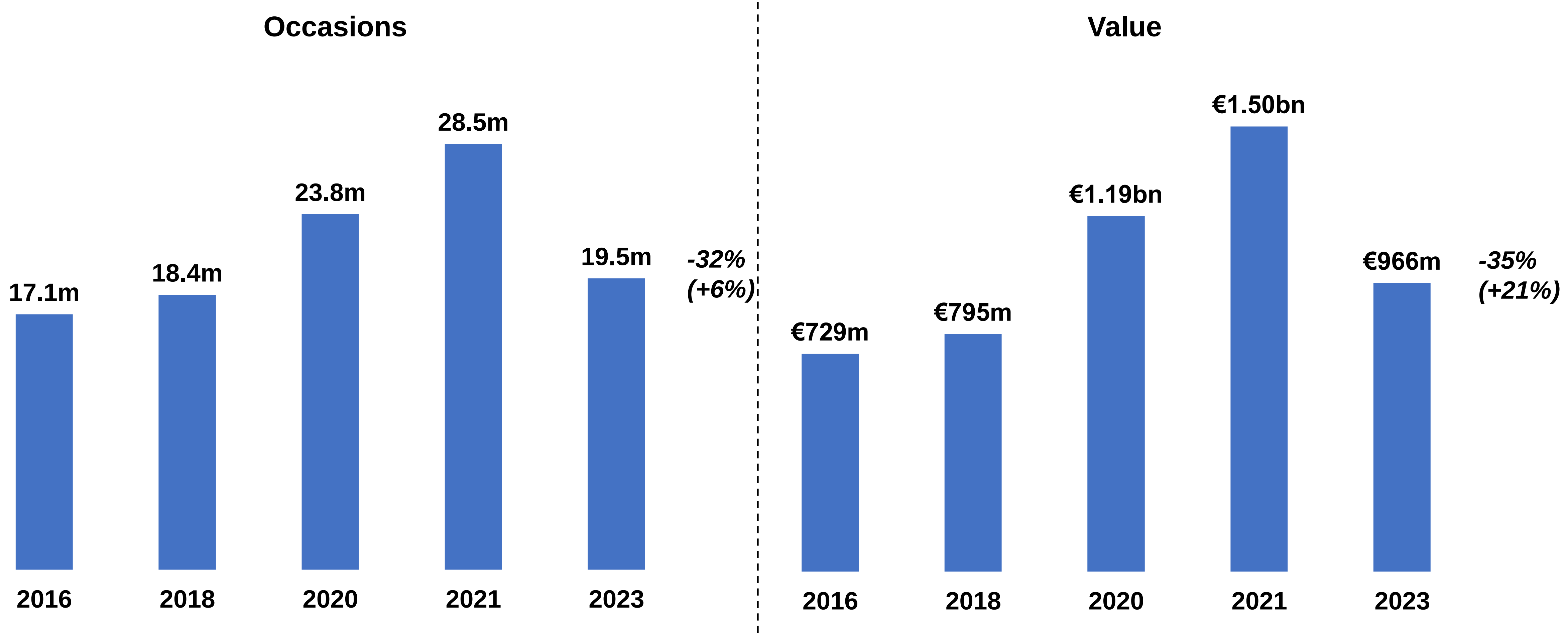
Key Findings

- Independent garden centres (23%) and DIY stores (17%) remain the most important channels for spend on gardening products. While supermarkets (including discounters) account for 11% of spend, a third of purchases are made in these channels.

- Online purchasing became an important channel for purchasing a range of gardening products during Covid. This trend has largely been sustained beyond: 9% of spend in the market was made on the internet, compared with just 3% prior to 2020. It is worth noting that online has retained appeal in some areas only, however, such as garden products and trees. Elsewhere, more traditional purchasing channels have rebounded. For example, share of online spend on bulbs/flower seeds for planting, and herbs/fruit/veg for planting has almost halved compared with 2023. Likewise, shopping in florist shops for cut flowers has dented online share.

Gardening Market

Size of the Gardening Market



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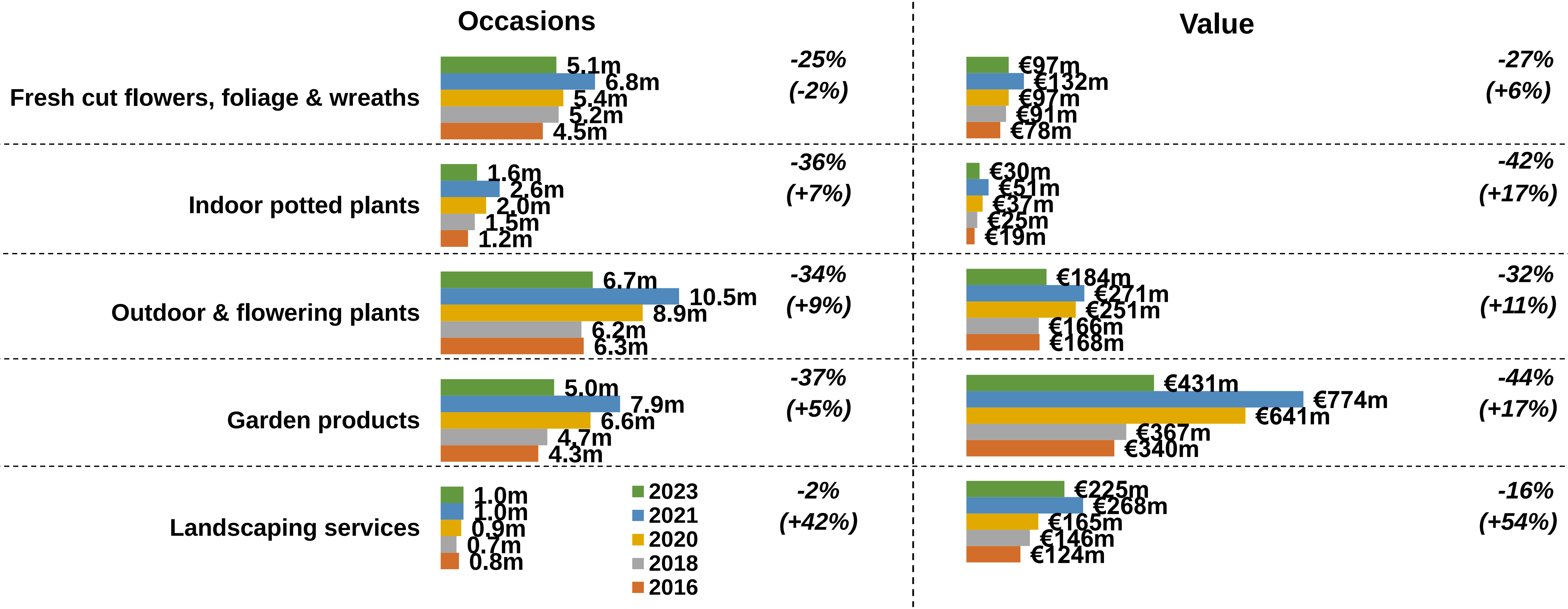
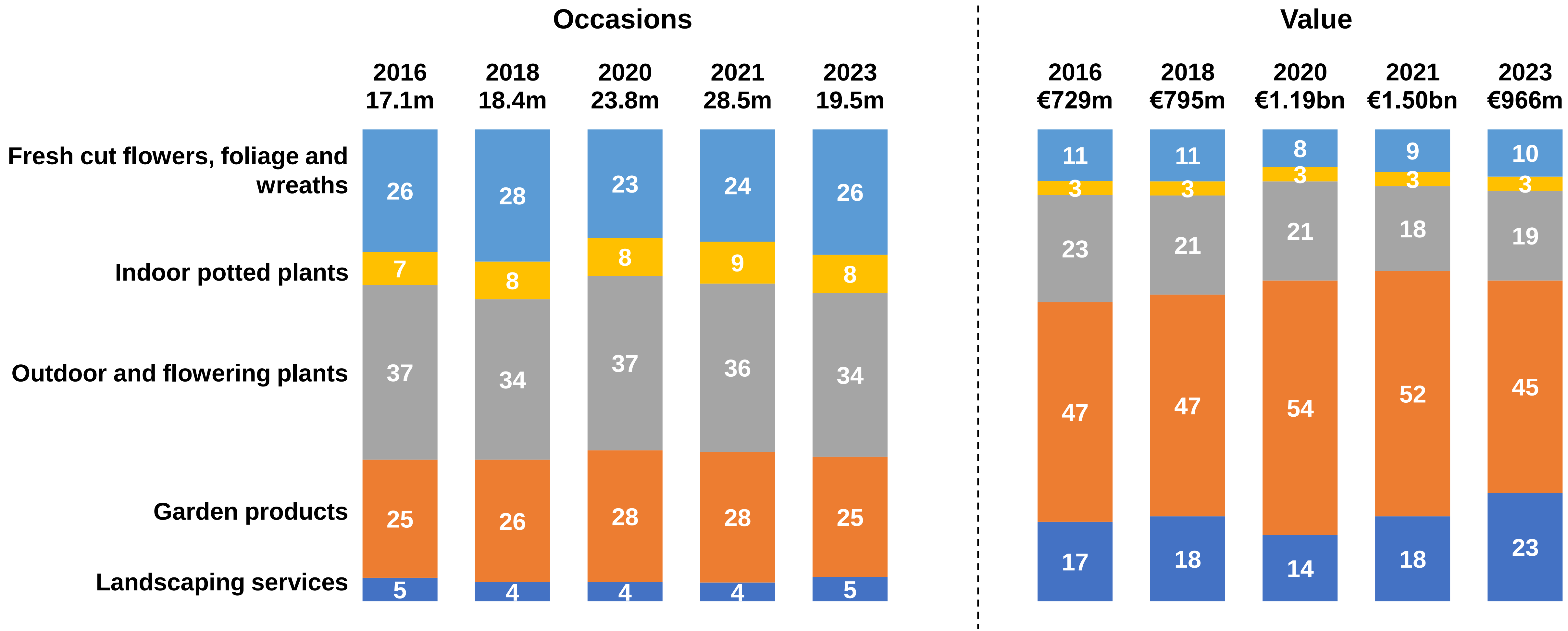
Garden Amenity Market Size X Category



Amenity Market Size – Share of Market



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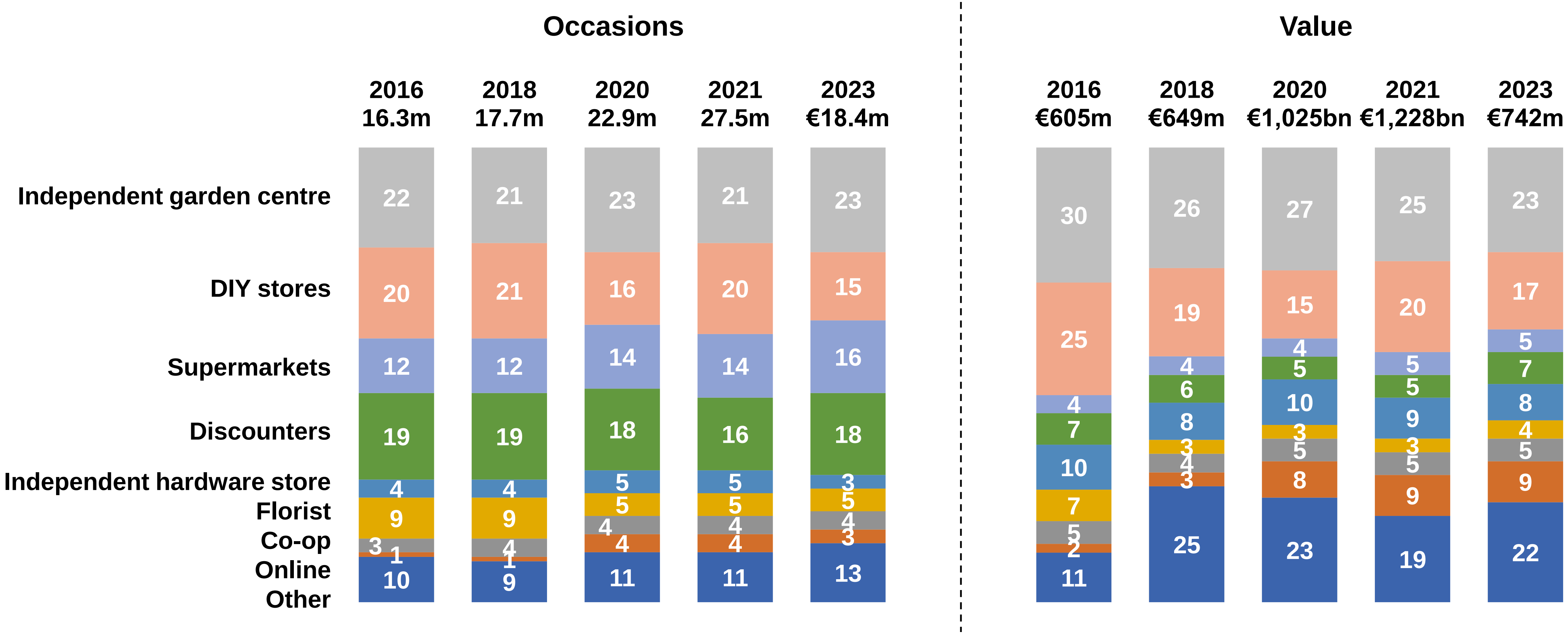
Amenity Market* X Share of Channel



*Excludes landscaping services

Outdoor And Flowering Plants

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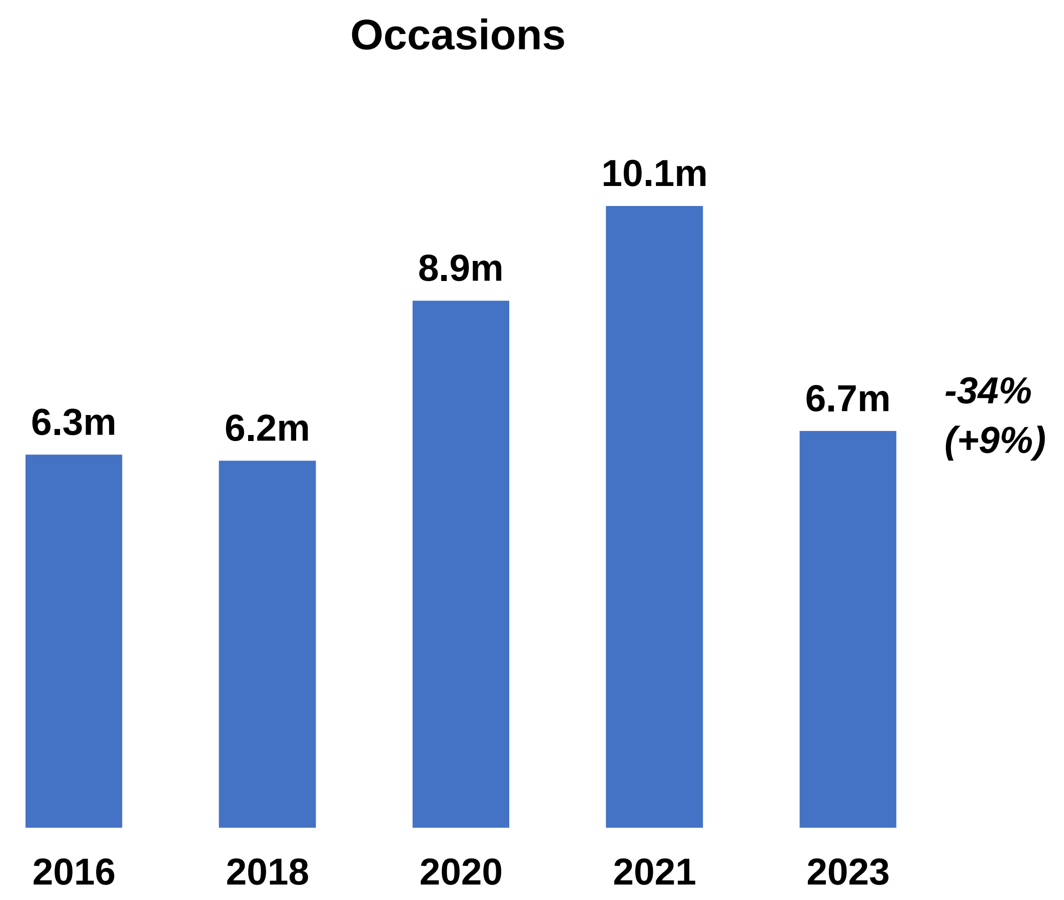
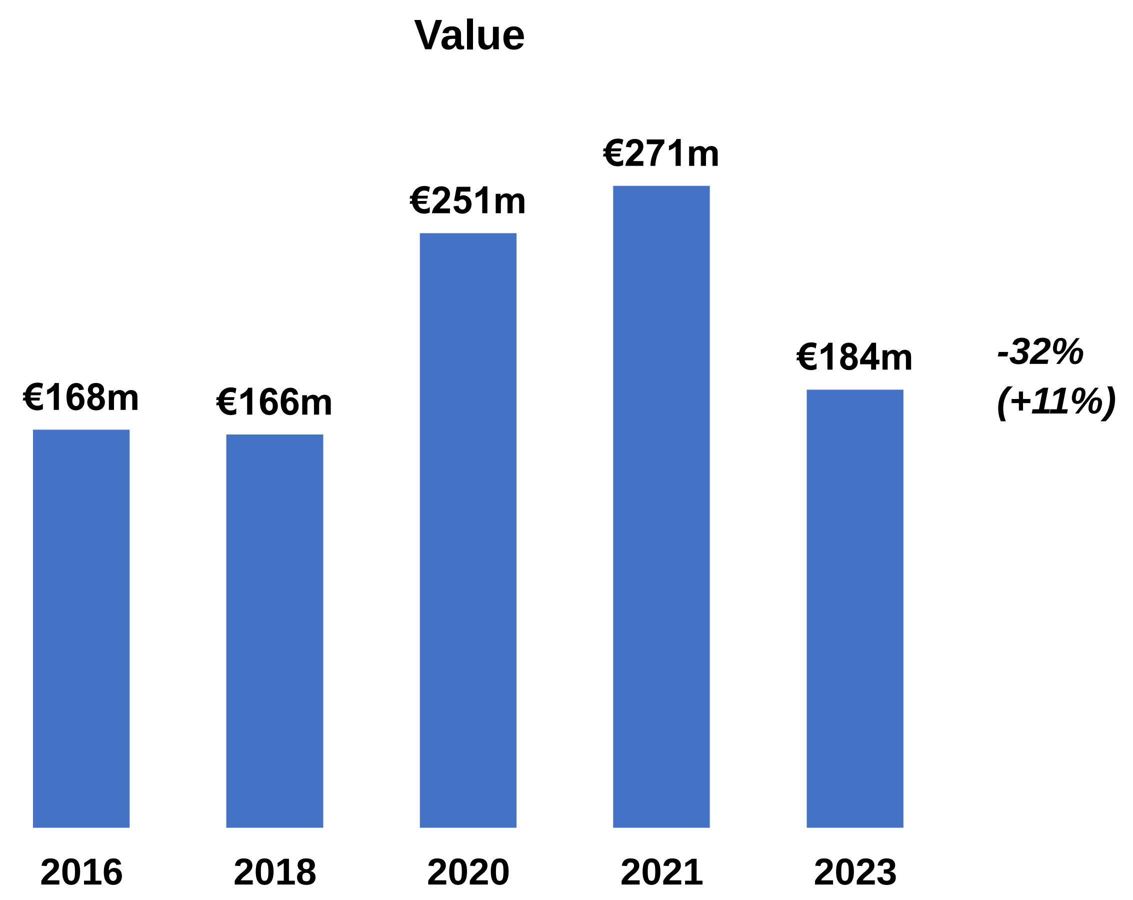
Outdoor And Flowering Plants Category

Definition includes:

- Pre-planted hanging baskets or outdoor containers
- Bulbs/flower seeds for planting (e.g. daffodils, sweet pea)
- Trees/hedges
- Shrubs
- Bedding plants (e.g. wallflowers, primroses, geraniums, 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 including trees, bushes and seeds for growing yourself
- Other outdoor plants (e.g. ornamental grasses, bamboo, ferns, water plants)

Outdoor & Flowering Plants – Summary





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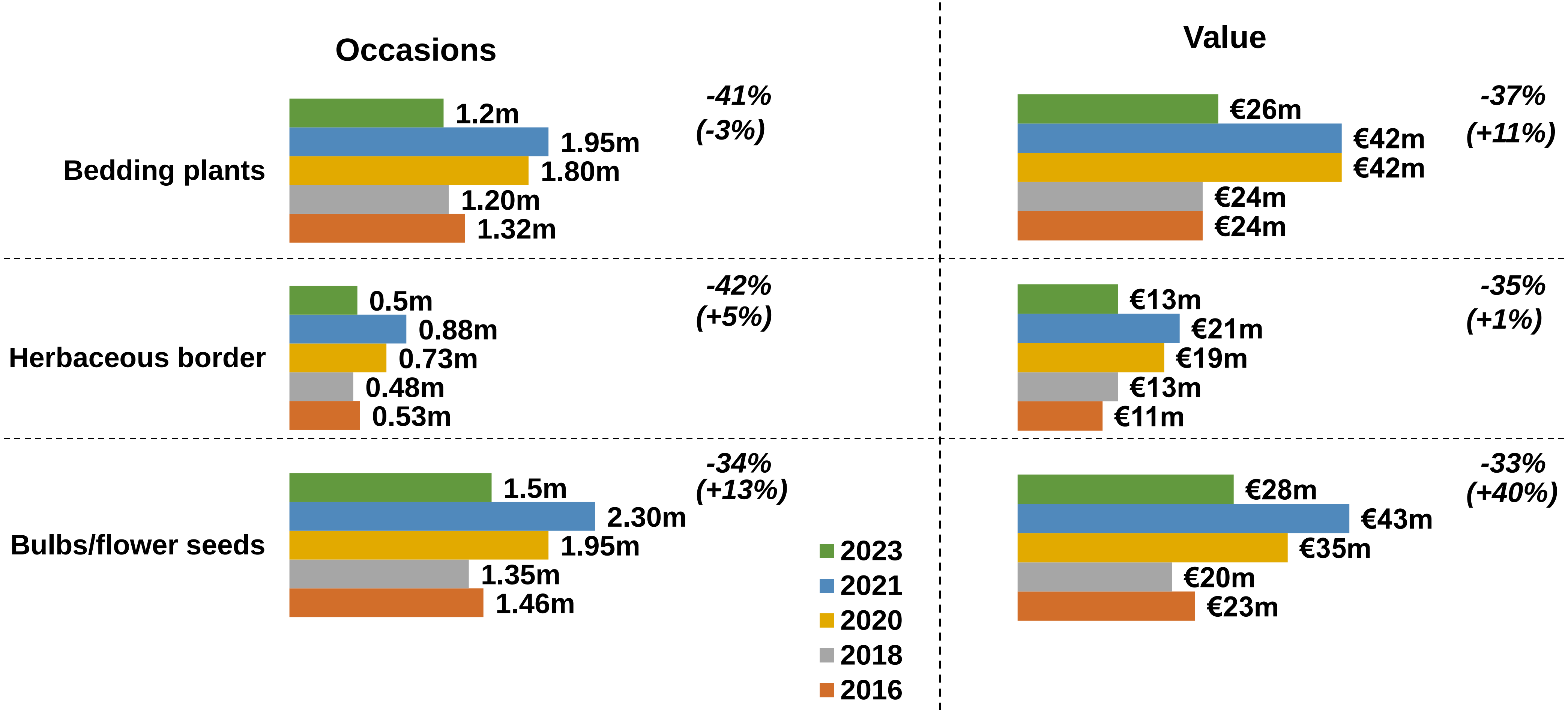
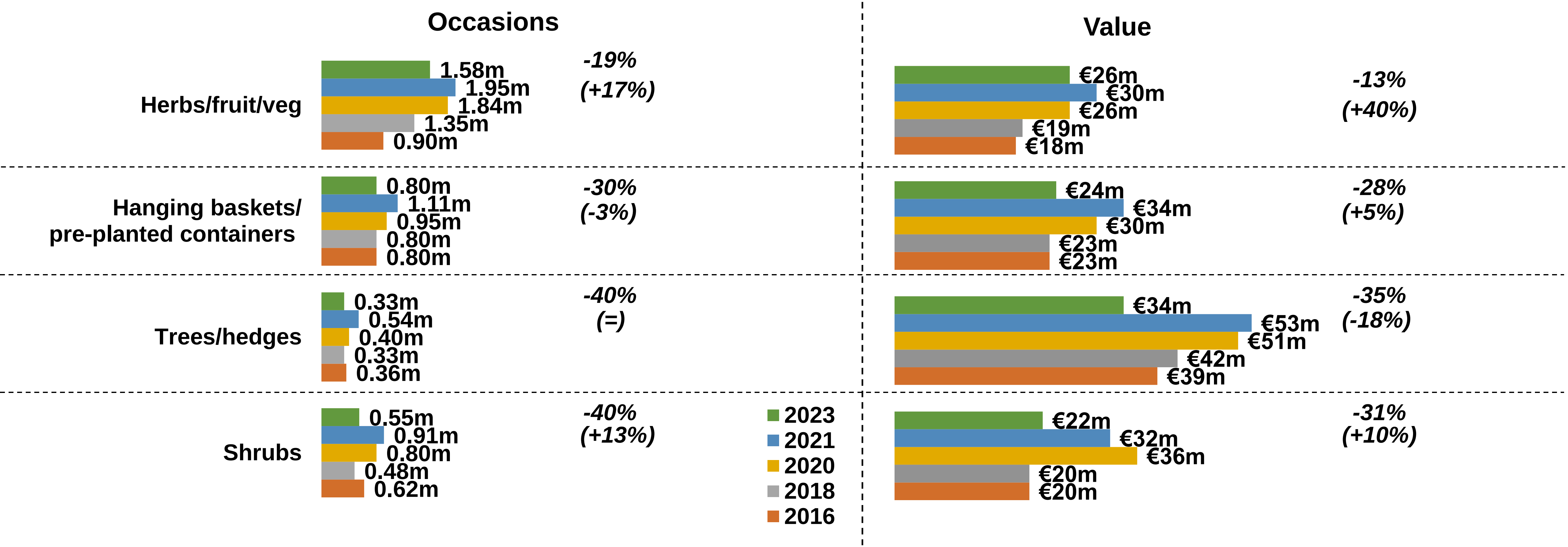
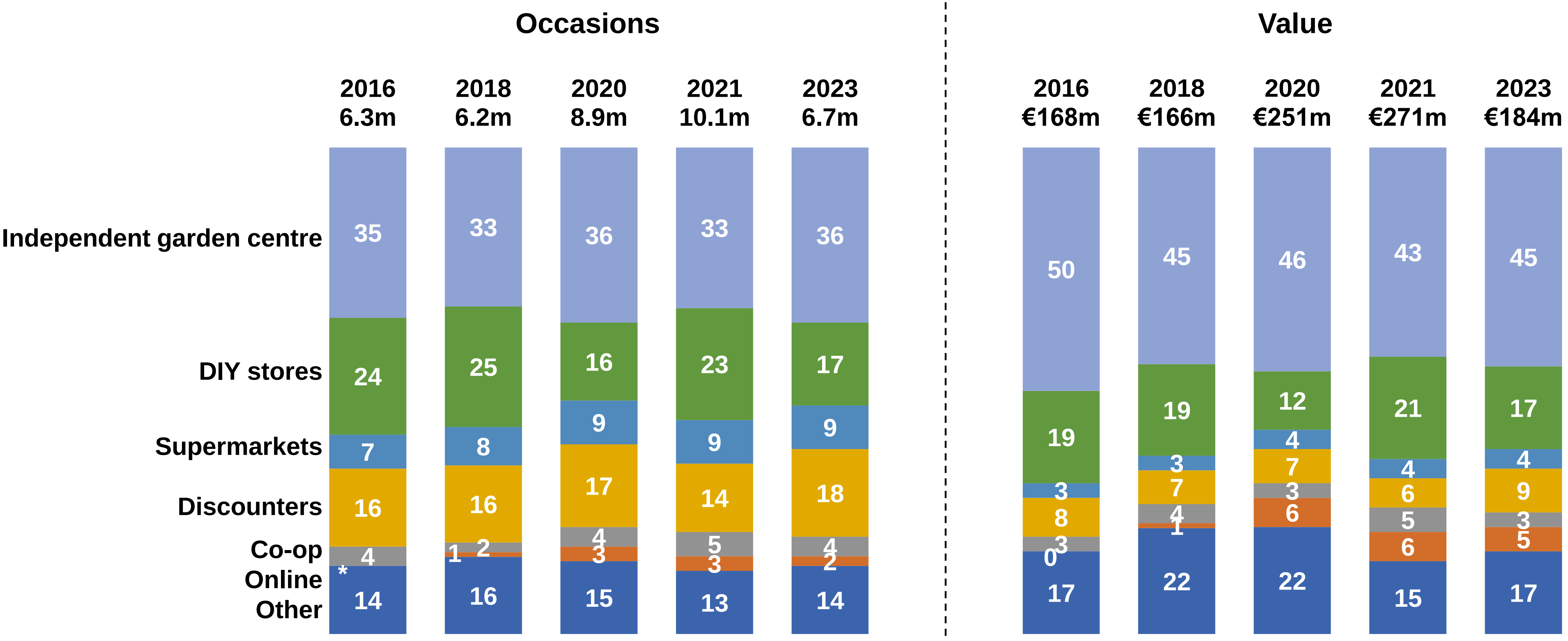
Outdoor & Flowering Plants: Products Breakdown



Outdoor & Flowering Plants: Products Breakdown

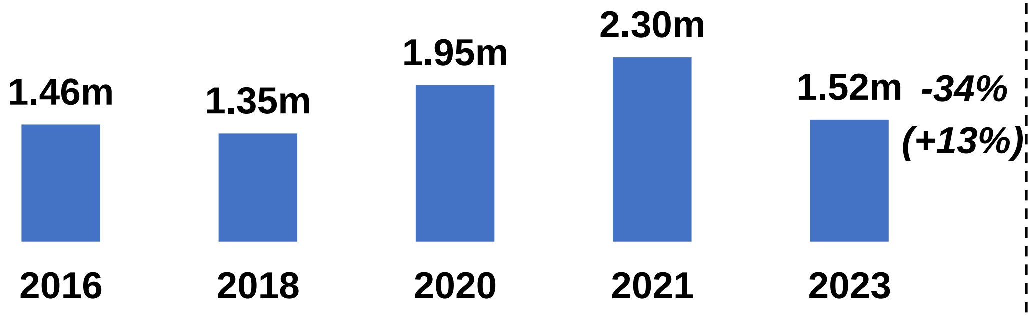


Outdoor & Flowering Plants X Share of Channel

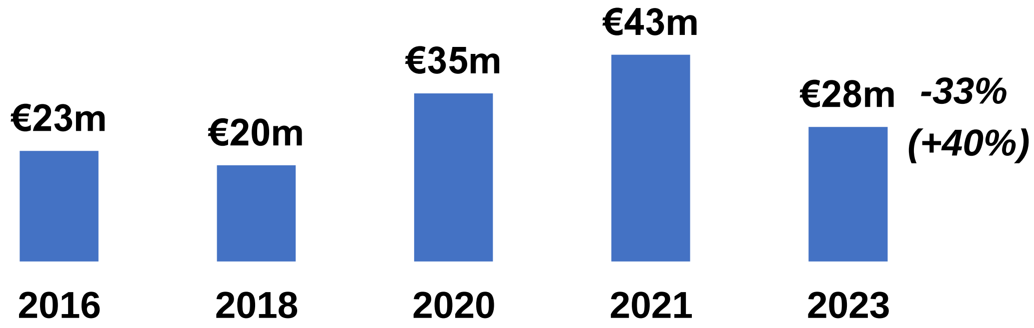


Outdoor & Flowering Plants X Product - Bulbs/Flower Seeds For Planting

Occasions

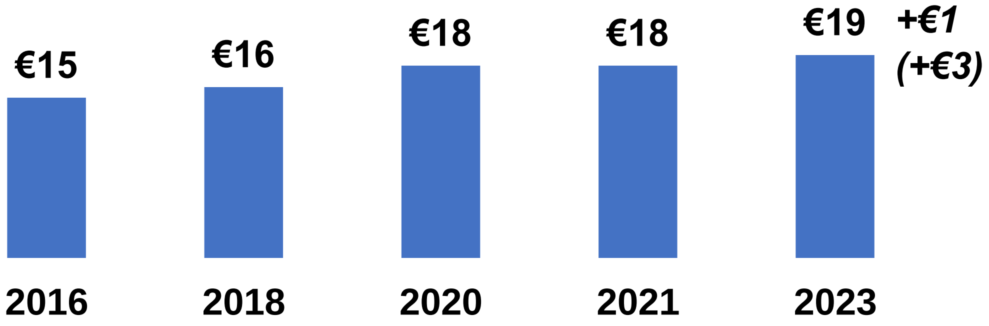


Value



	2016	2018	2020	2021	2023
Per capita	.40	.36	.50	.58	.37
	€6.30	€5.34	€9.05	€10.73	€6.93

Spend per purchase occasion



Key Demographics

- Somewhat older profile. Nearly half of spend is by those over 55.
- 35% of spend is by those aged 35-55, which is lower than during Covid.
- 7% of spend online, down from 12% in the last measure. Garden centres experienced a strong year, with 40% of spend share.

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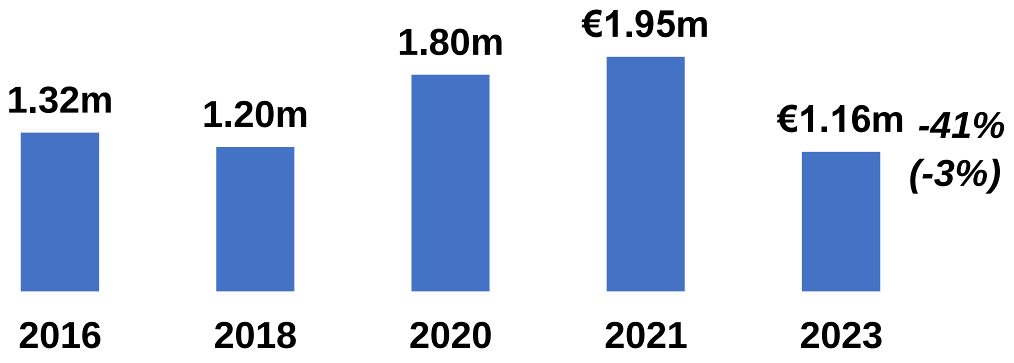
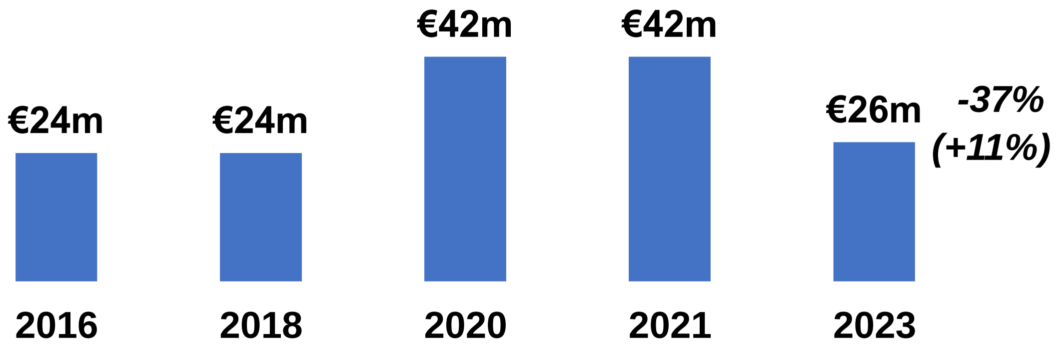
Outdoor & Flowering Plants X Product - Bedding Plants

Occasions

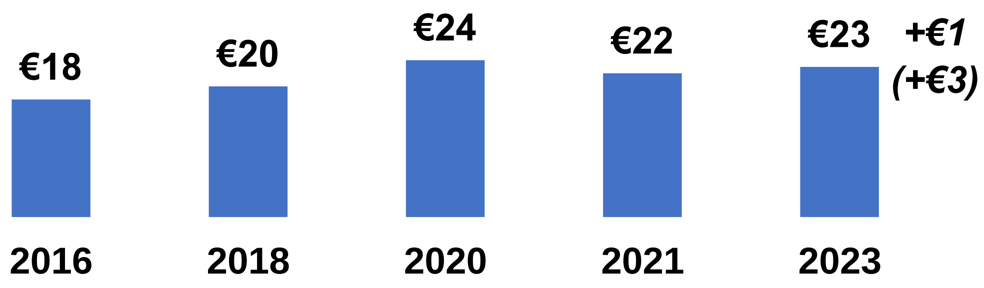


Value



	2016	2018	2020	2021	2023
Per capita (Occasions)	.36	.32	.45	.49	.28
Per capita (Value)	€6.41	€6.60	€6.25	€10.64	€10.58

Spend per purchase occasion

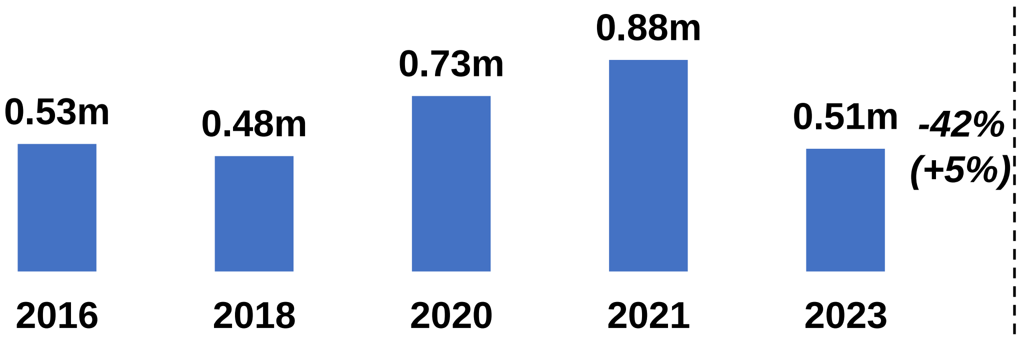


Key Demographics

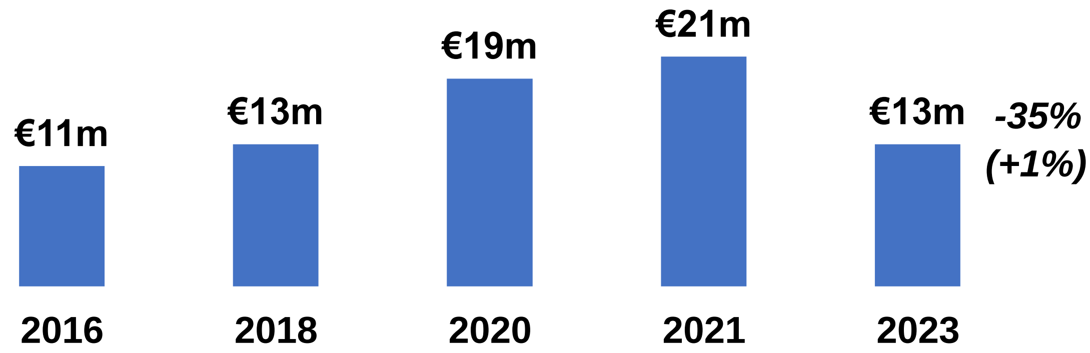
- Half of all spend is from 55+ age group, unchanged from previous measures.
- Garden centres account for the largest share of purchasing occasions and spend.
- DIY stores' share not as strong as in previous years.

Outdoor & Flowering Plants X Product - Herbaceous Border Plants

Occasions

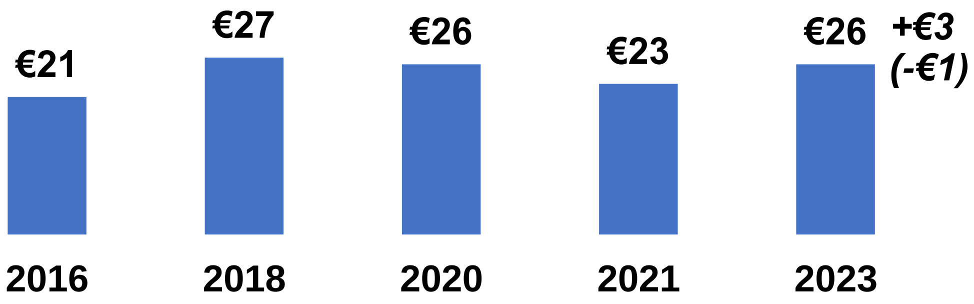


Value



	2016	2018	2020	2021	2023
Per capita (Occasions)	.15	.13	.19	.22	.12
Per capita (Value)	€3.03	€3.46	€4.86	€5.18	€3.24

Spend per purchase occasion



Key Demographics

- Gender profile reasonably balanced.
- 35-55 year olds account for around 4 in 10 of spend.
- More than half of all spend (55%) is through Independent Garden Centres. DIY next most significant competitor with 17% share.

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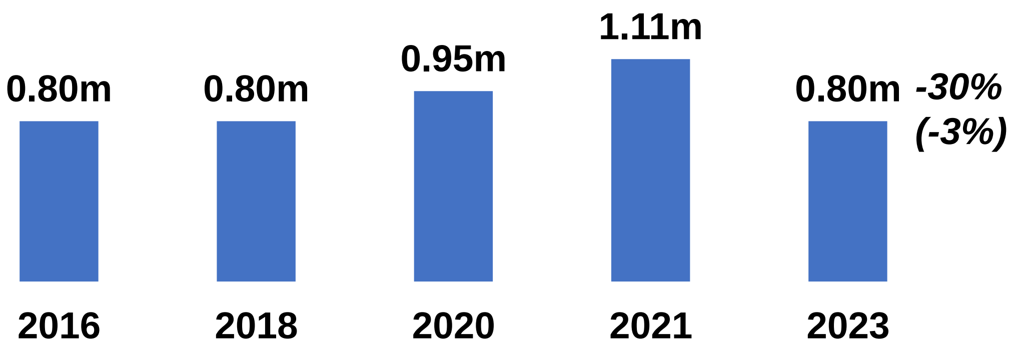
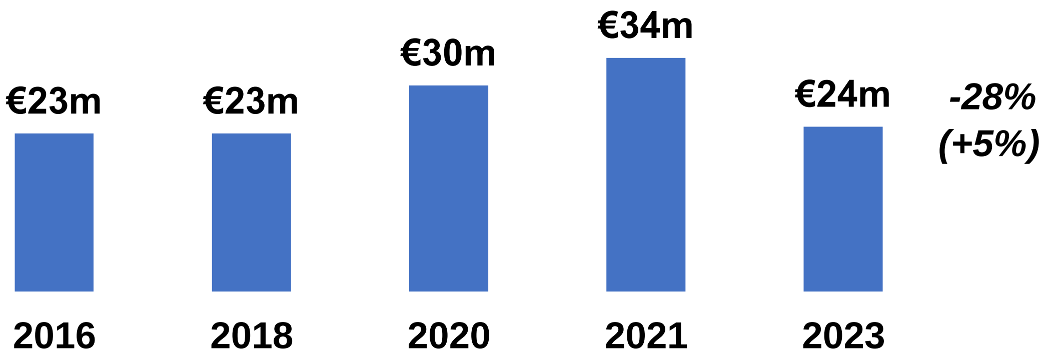
Outdoor & Flowering Plants X Product
- Hanging Baskets & Pre-planted Containers

Occasions



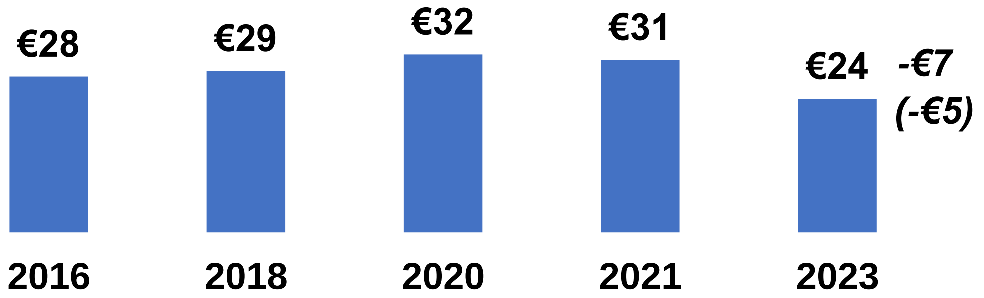
Per capita .22 .21 .24 .28 .19

Value



€6.19 €6.10 €7.70 €8.56 €5.95

Spend per purchase occasion



Key Demographics

- The appeal of hanging baskets and pre-planted containers is broadly spread demographically.
- A quarter of all spend is by those aged under 34. A greater proportion of spend from 35 – 55 year olds than before.
- Garden centres and DIY stores are the key outlets for purchasing these products. DIY share has remained robust.
- 40% of spend is channelled through Independent Garden Centres.

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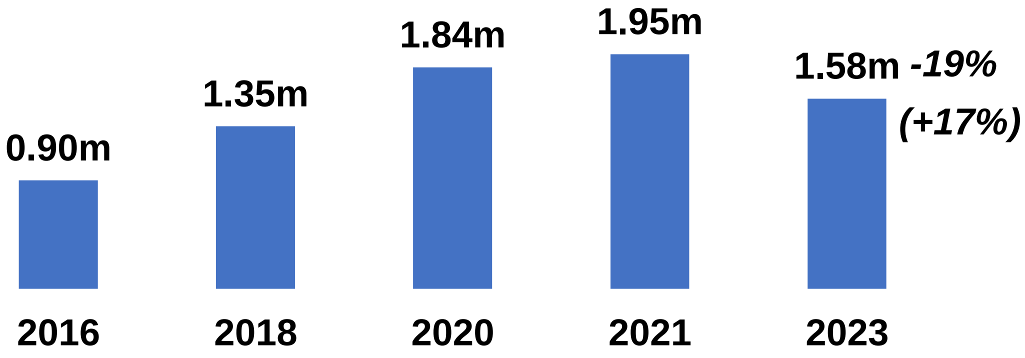
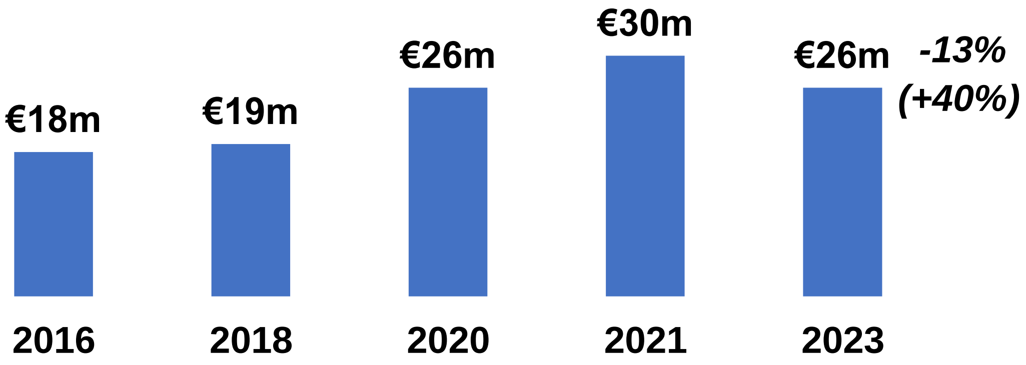
Outdoor & Flowering Plants X Product - Herbs, Fruit & Vegetables For Planting

Occasions



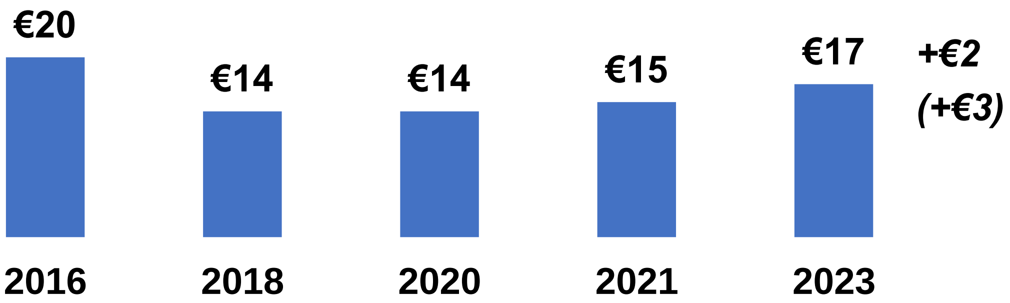
Per capita .25 .36 .47 .49 .39

Value



€4.88 €4.91 €6.76 €7.56 €6.39

Spend per purchase occasion

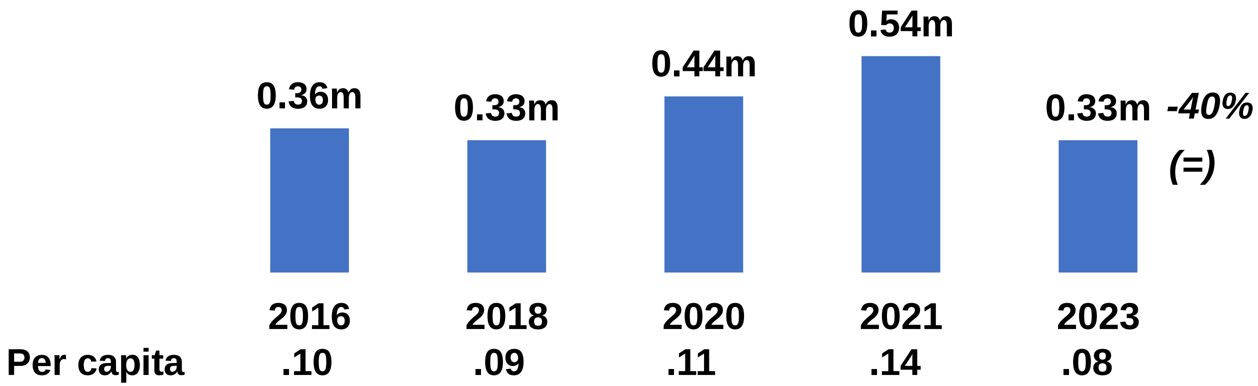


Key Demographics

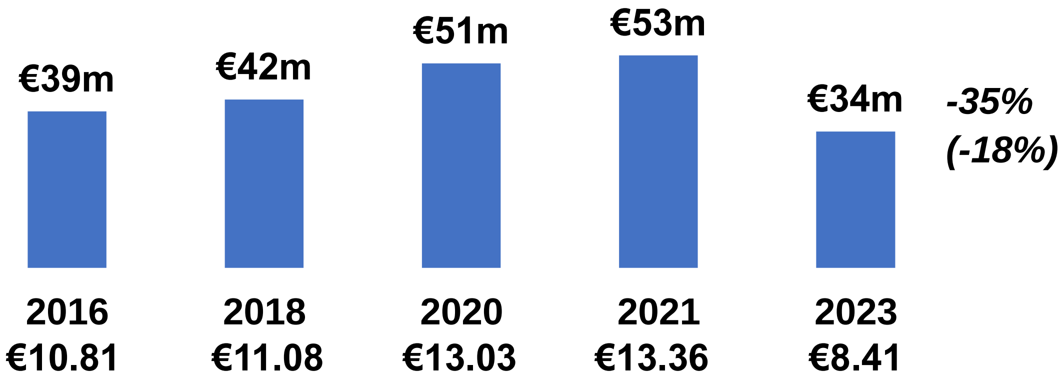
- Herbs fruit and vegetables for growing yourself are broadly spread demographically, unchanged.
- Purchasing is broadly spread across the main channels, though 41% of spend is through Independent Garden Centres.
- Online share of spend has halved since 2023, now closer to pre-Covid levels.

Outdoor & Flowering Plants X Product - Trees/Hedges

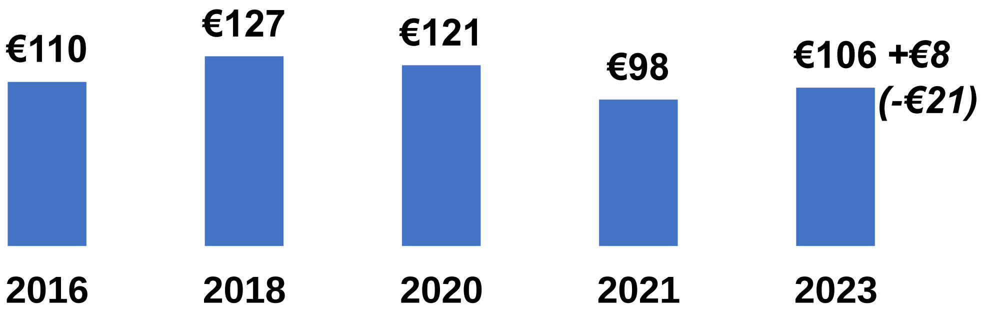
Occasions



Value



Spend per purchase occasion



Key Demographics

- Trees and hedges are more likely to be bought by men.
- Age profile significantly older than previous measures. U35s account for just 12% of spend. Pre-Covid this was 39%.
- Independent Garden Centres are the primary channel for Trees/Hedges. 12% of spend was online this year, up slightly from 2020.

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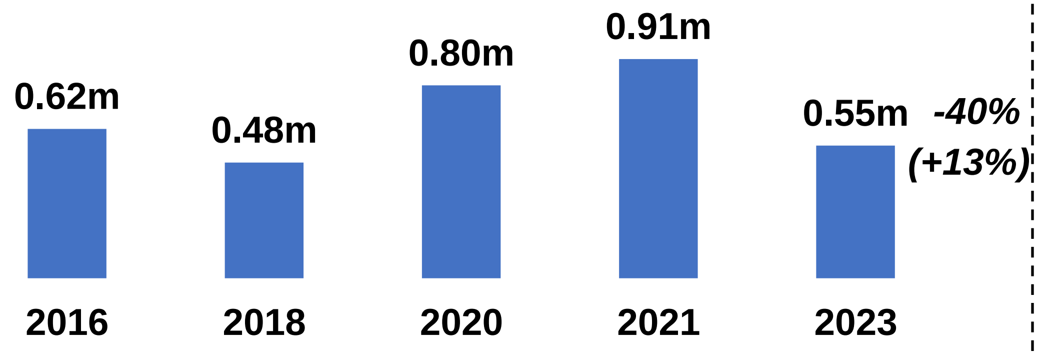
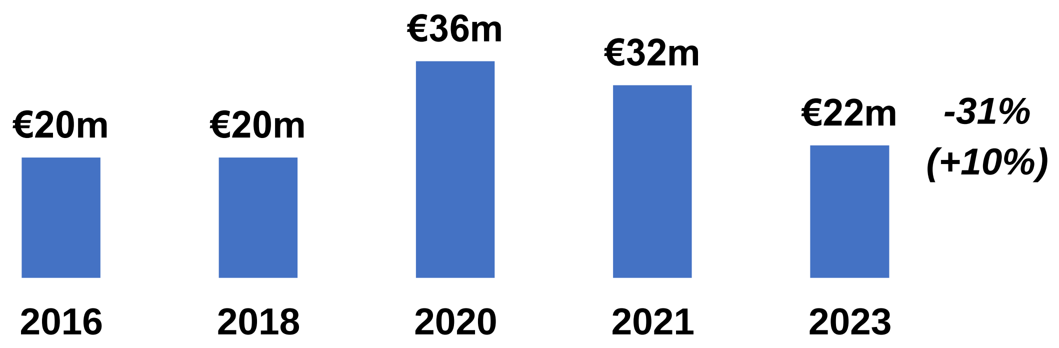
Outdoor & Flowering Plants X Product - Shrubs

Occasions

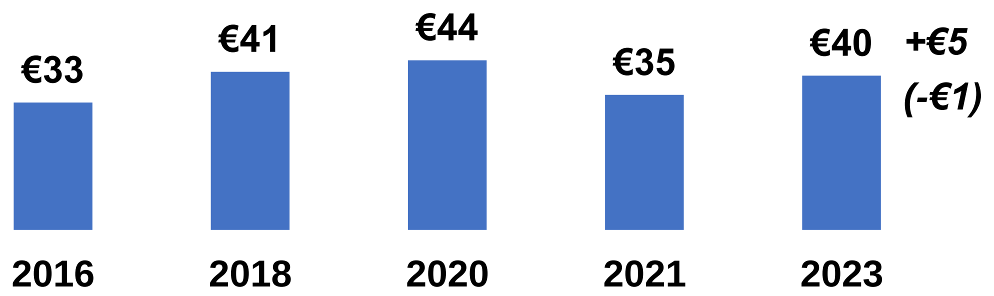


Value



	2016	2018	2020	2021	2023	2016	2018	2020	2021	2023
Per capita	.17	.13	.21	.23	.13	€5.55	€5.25	€9.12	€8.04	€5.35

Spend per purchase occasion



Key Demographics

- Spend on shrubs has an older bias – half of all purchase occasions are by those aged 55 or over, while less than 1 in 10 purchases are from the U35 age cohort.
- The majority of spend on shrubs is through independent Garden Centres.

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Indoor Potted Plants

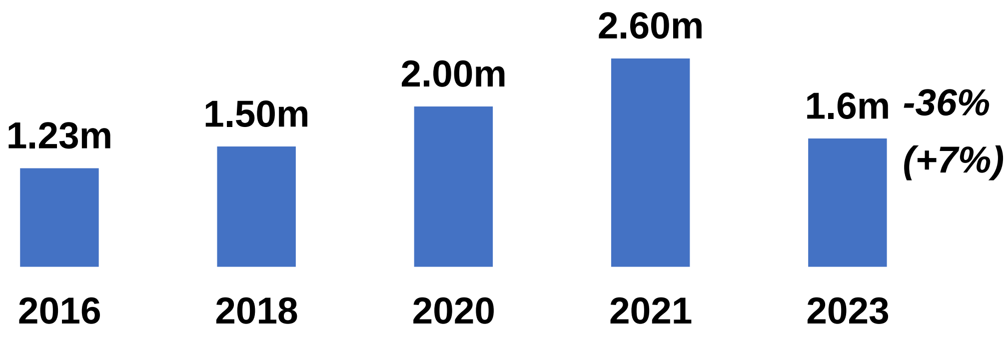
Indoor Potted Plants

Definition includes:

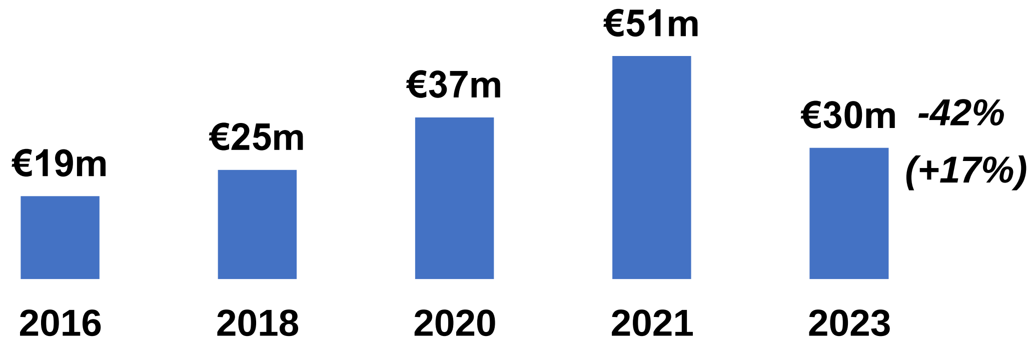
- Indoor potted plants (e.g. orchids, geraniums, spider plants, fig plants, cordyline)

Indoor Potted Plants – Summary

Occasions

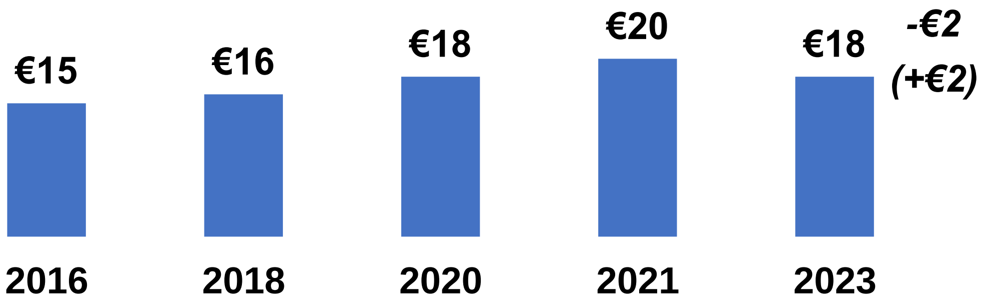


Value



	2016	2018	2020	2021	2023
Per capita (Occasions)	.34	.41	.52	.65	.40
Per capita (Value)	€5.13	€6.64	€9.44	€12.80	€7.22

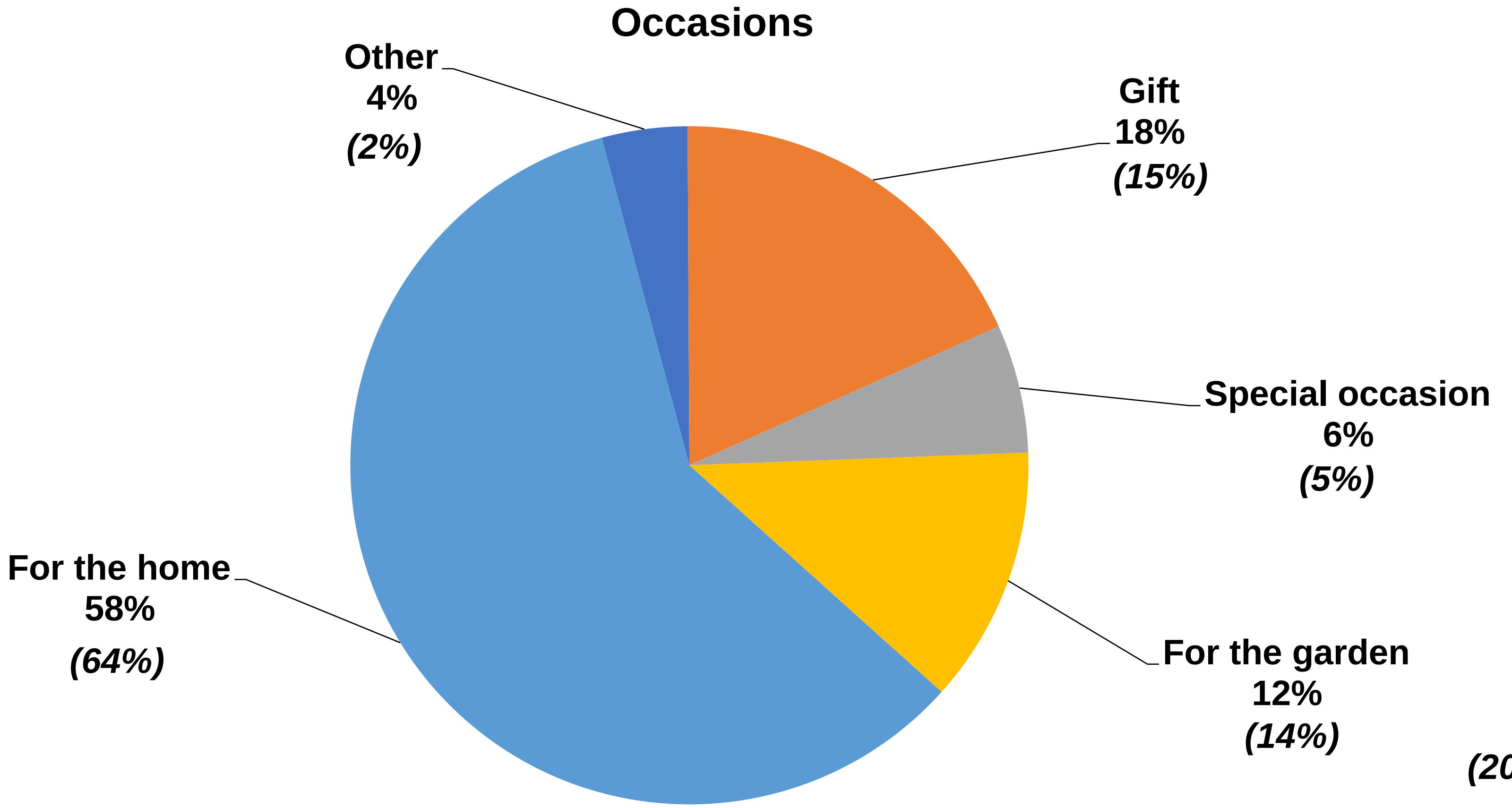
Spend per purchase occasion



Key Demographics

- The profile of purchasers of Indoor Potted Plants is in line with the population, in contrast to a decade ago, when the profile had an older bias.
- Discounters and supermarkets account for 4 in 10 purchases, though garden centres and DIY account for a greater proportion of spend.
- DIY share has contracted at the expense of Supermarkets and Independent Garden Centres.
- Most purchases are for the home, though "giving" has increased.

Reasons For Purchasing Indoor Potted Plants - Occasions



(2021 %s in brackets)

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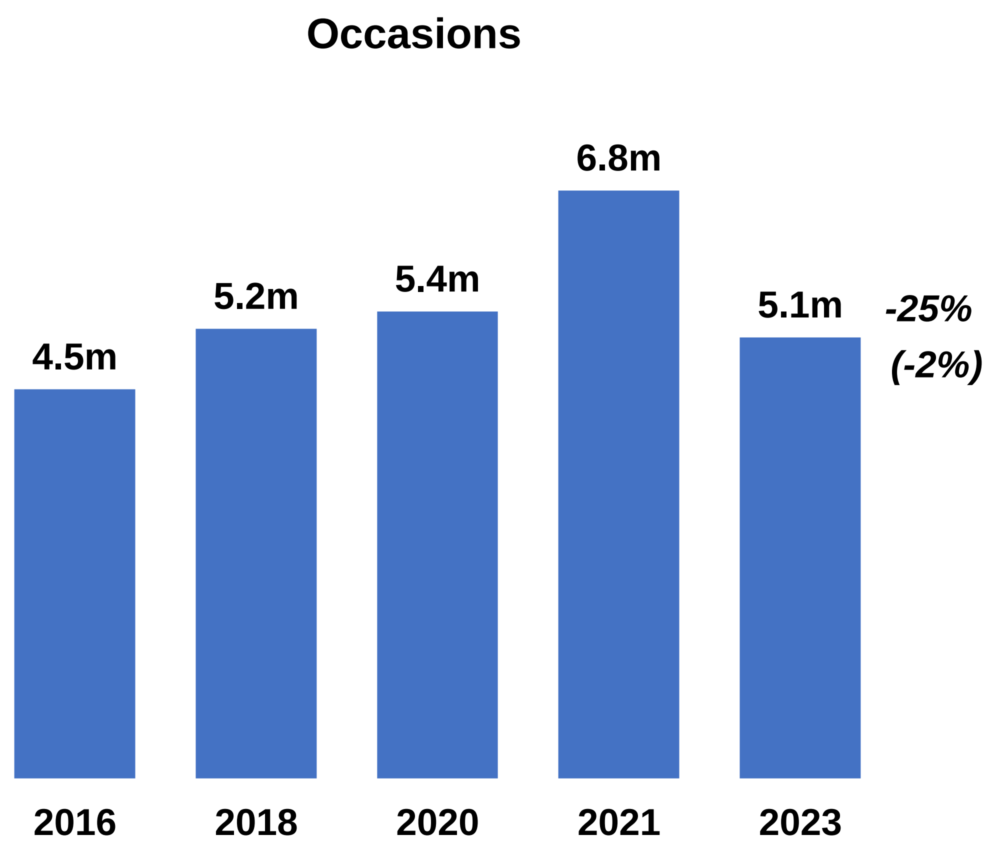
Fresh Cut Flowers

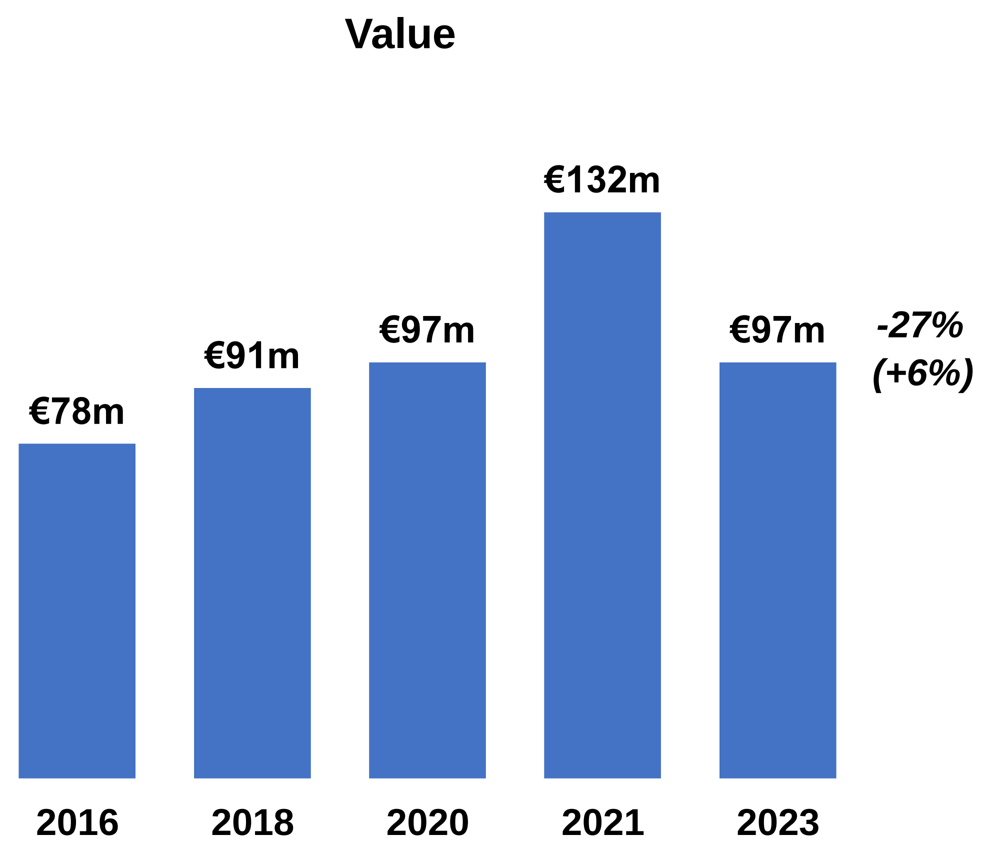
Fresh Cut Flowers Category

Definition includes:

- Fresh cut flowers
- Wreaths
- Foliage

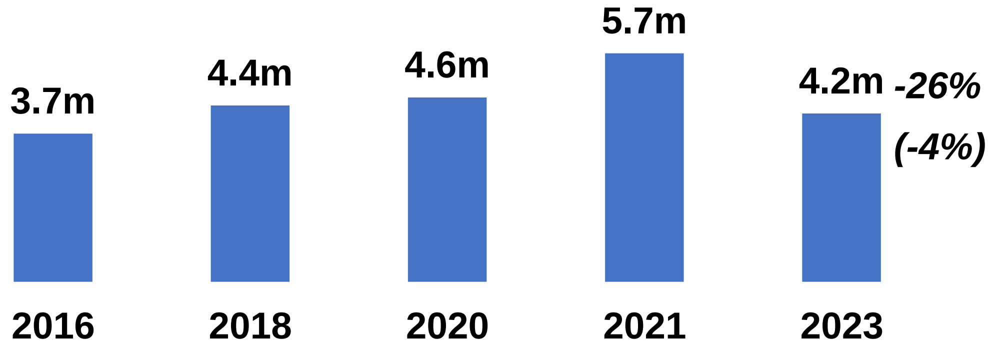
Fresh Cut Flowers, Foliage & Wreaths – Summary



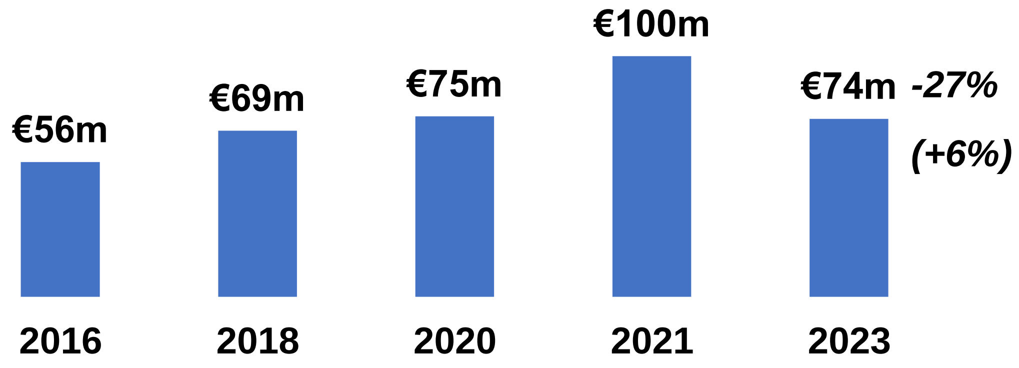


Fresh Cut Flowers Market*

Occasions

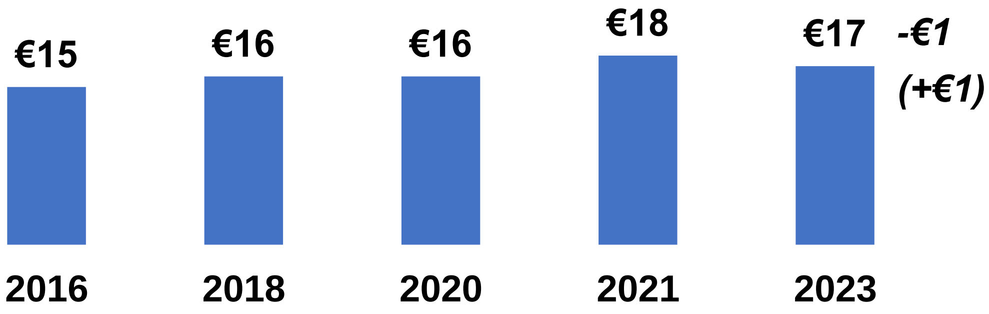


Value



	2016	2018	2020	2021	2023
Per capita (Occasions)	1.02	1.16	1.17	1.43	1.03
Per capita (Value)	€15.63	€18.31	€19.10	€25.30	€17.95

Spend per purchase occasion



Key Demographics

- Volume purchasing of cut flowers has a female bias, but men account for nearly half of all spend.
- Spend is spread relatively equally across age groups.
- 70% of purchases are through discounters and supermarkets.
- Florists share of spend has recovered to an extent, while online as a proportion of spend has halved.

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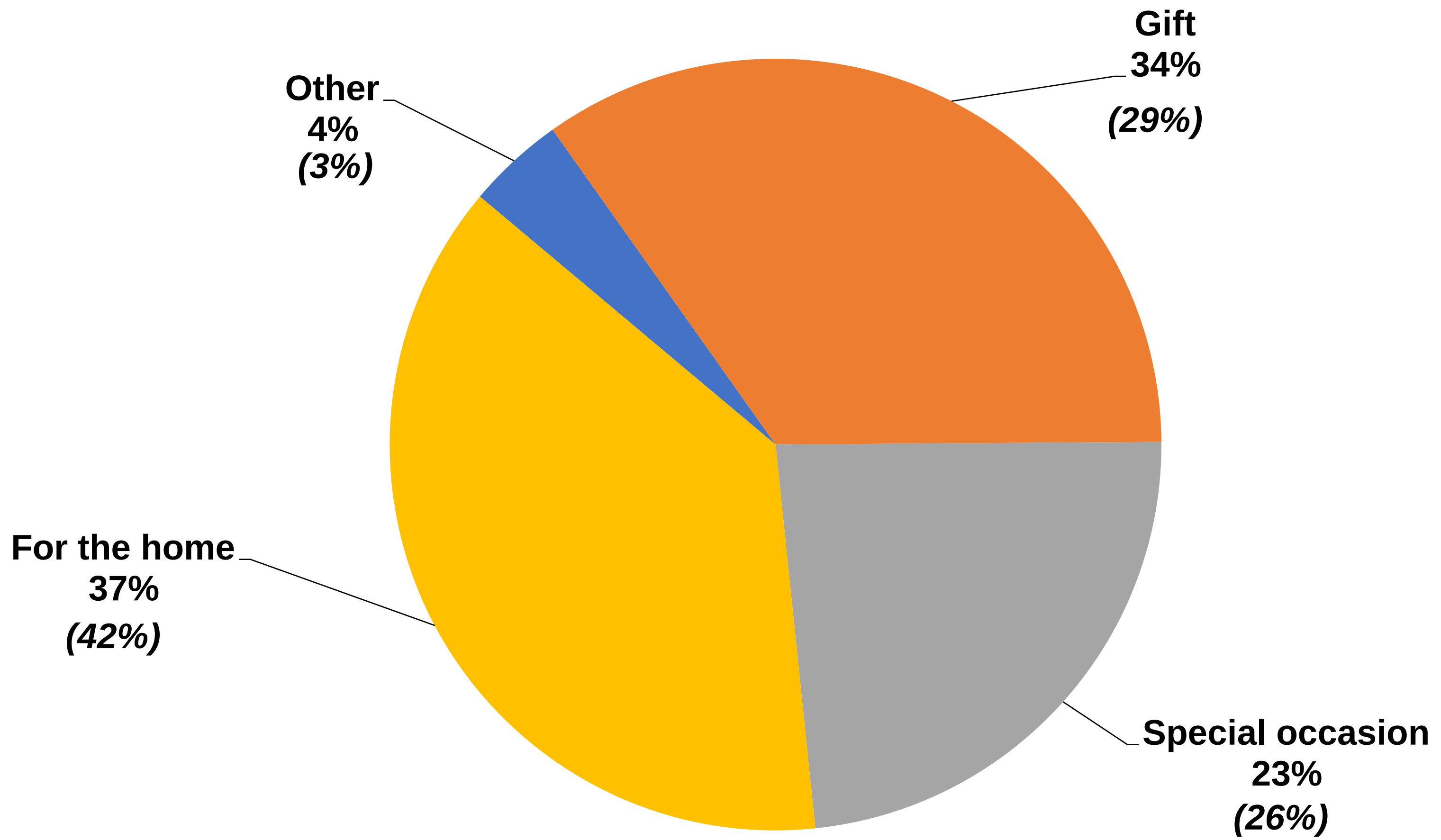
Excludes foliage & wreaths

Reasons For Purchasing Fresh Cut Flowers - Occasions



(2021 %s in brackets)

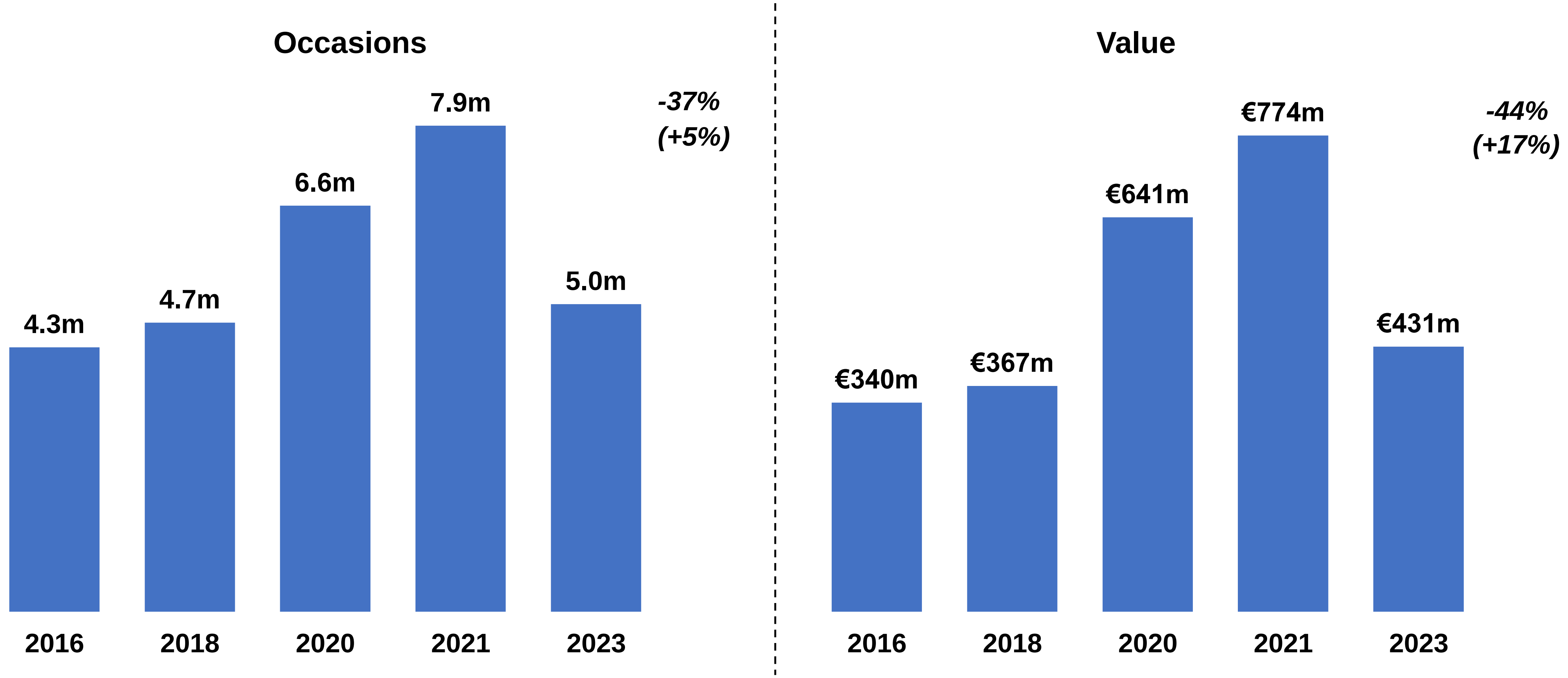
Garden Products

Garden Products Category

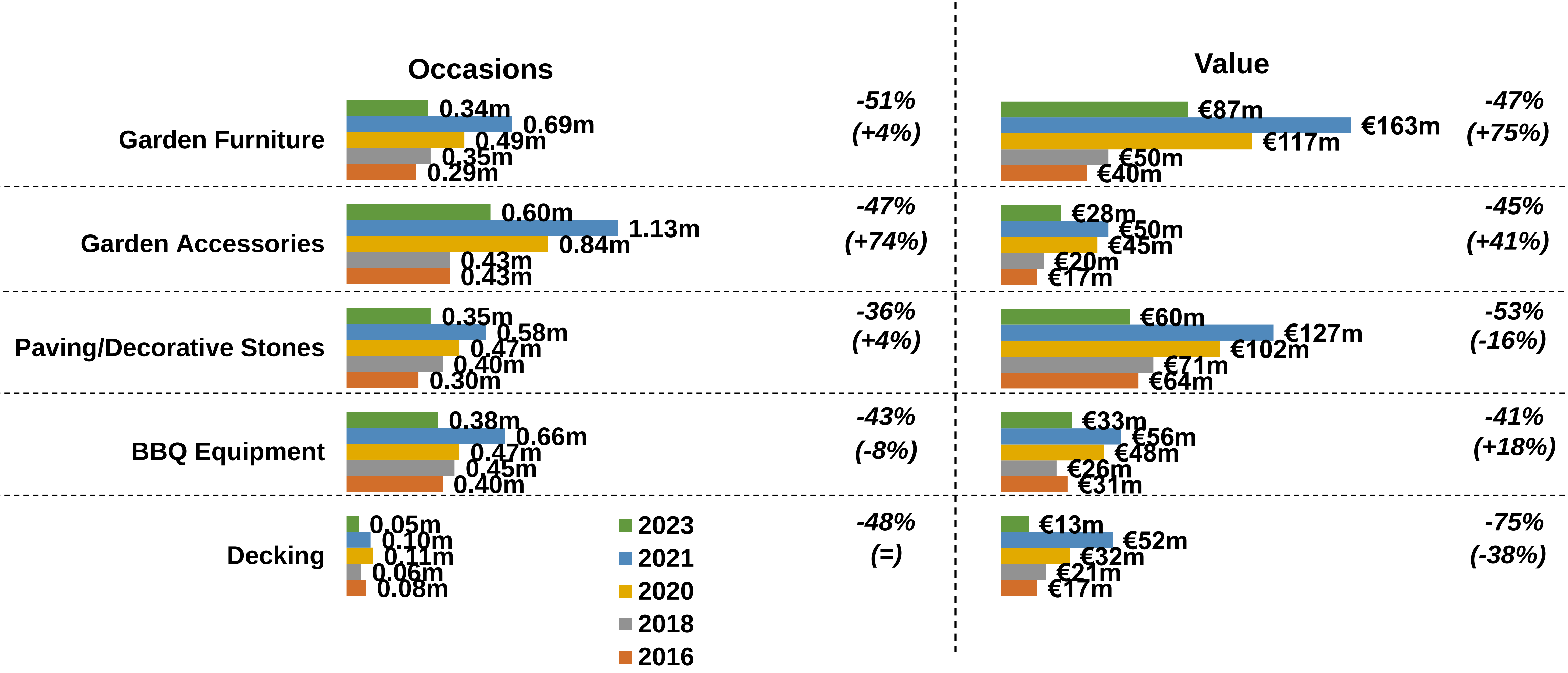
Definition includes:

- 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/gravel
- Decking
- BBQ equipment
- Garden furniture (e.g. tables, chairs, outdoor heaters)
- Gardening tools/equipment (e.g. spades, forks, hoes, strimmers, lawn mowers)
- Garden structures for growing in (incl. glass houses, tunnels, cloches)
- Other garden structures (e.g. sheds, trellising, fences, lean-to's, pergolas etc.)
- Other hard landscaping products (sleepers, bricks etc. for building in the garden).

Garden Products – Summary



Garden Products: Ornamental



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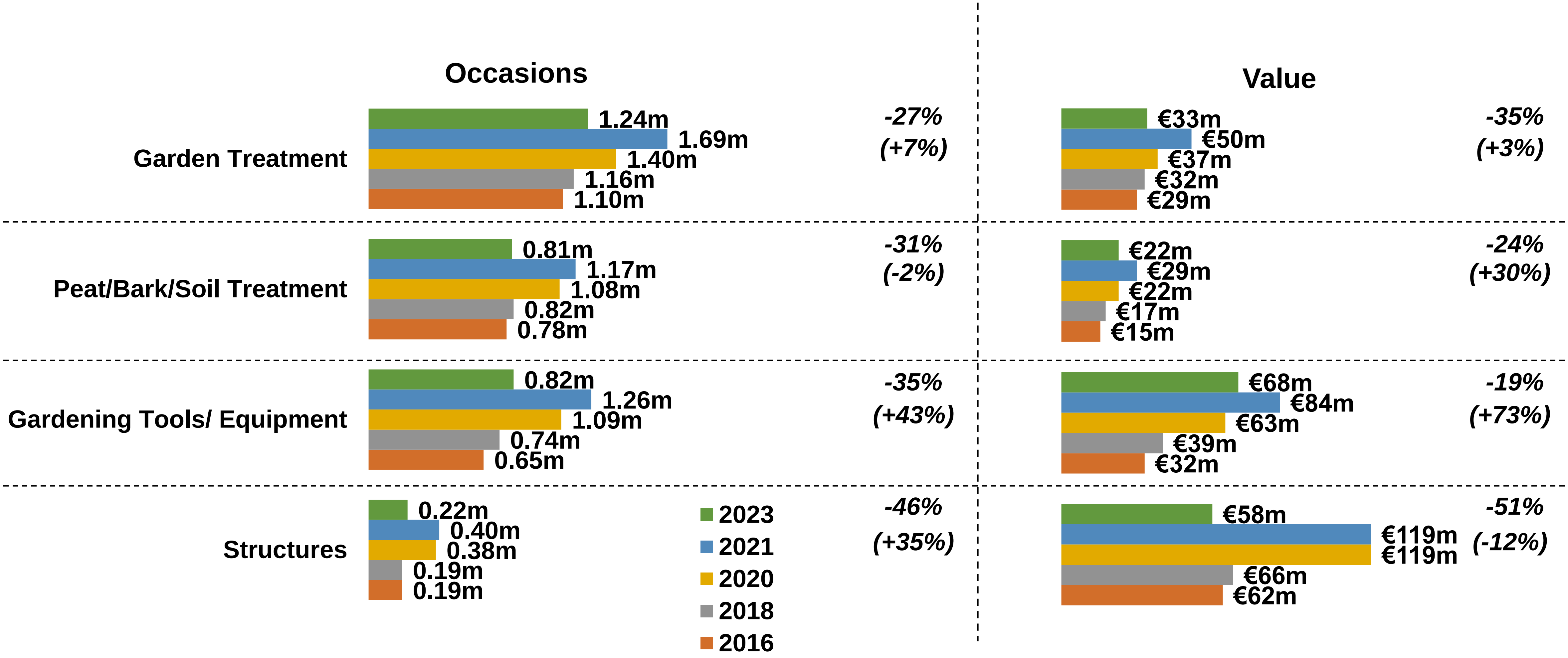
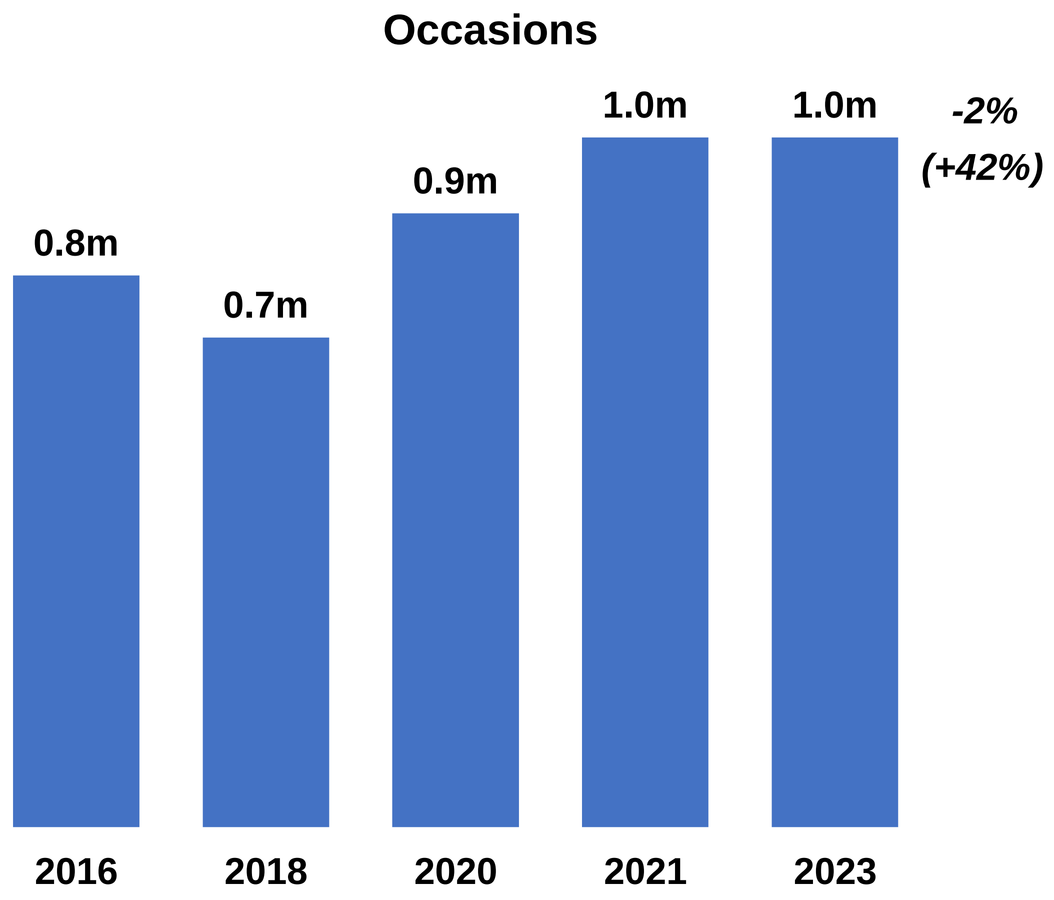
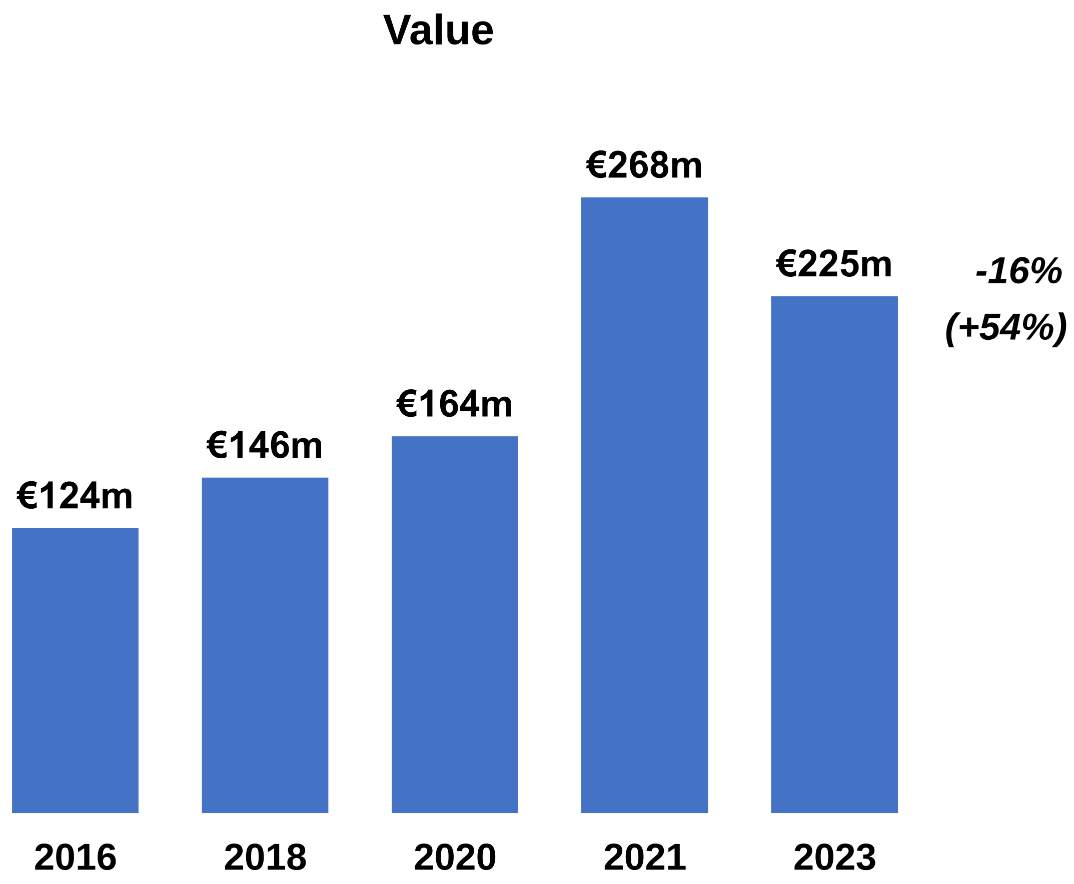
Garden Products: Functional



Landscaping Services

Landscaping Services – Summary





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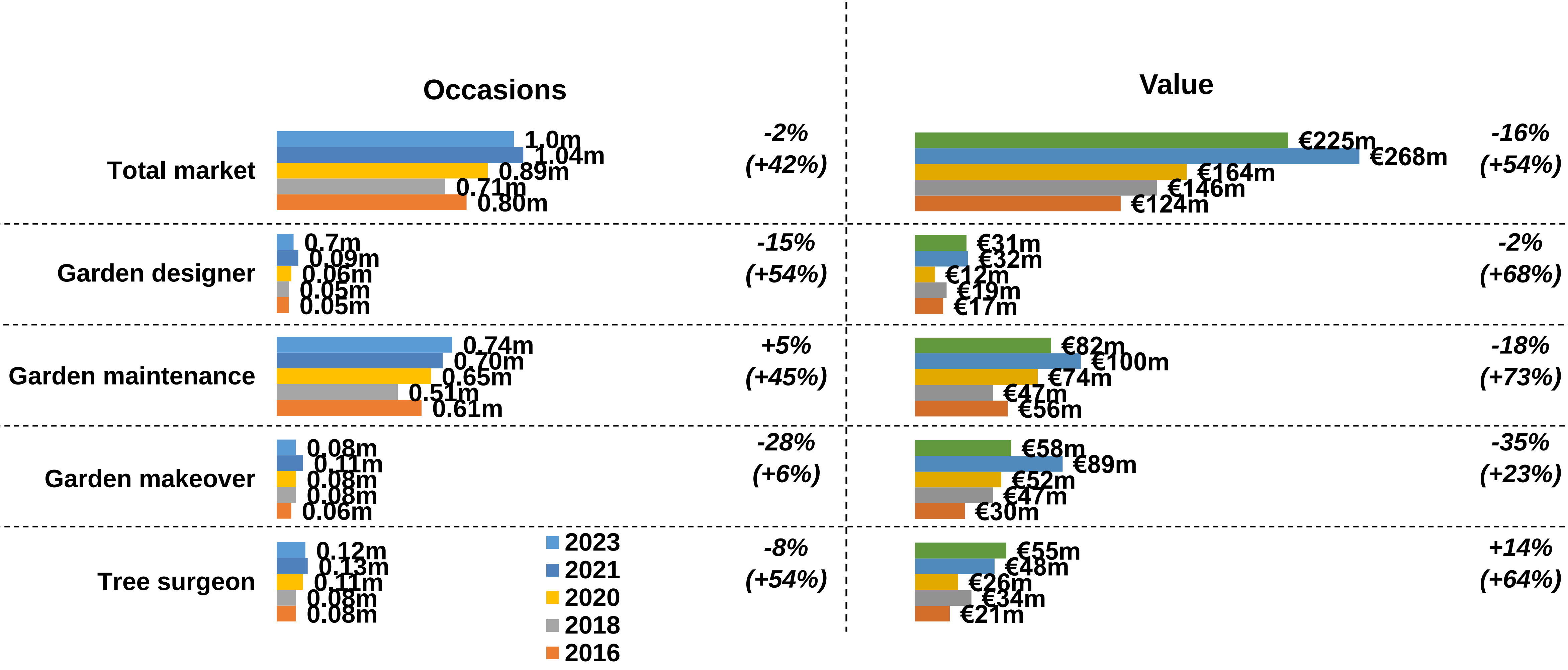
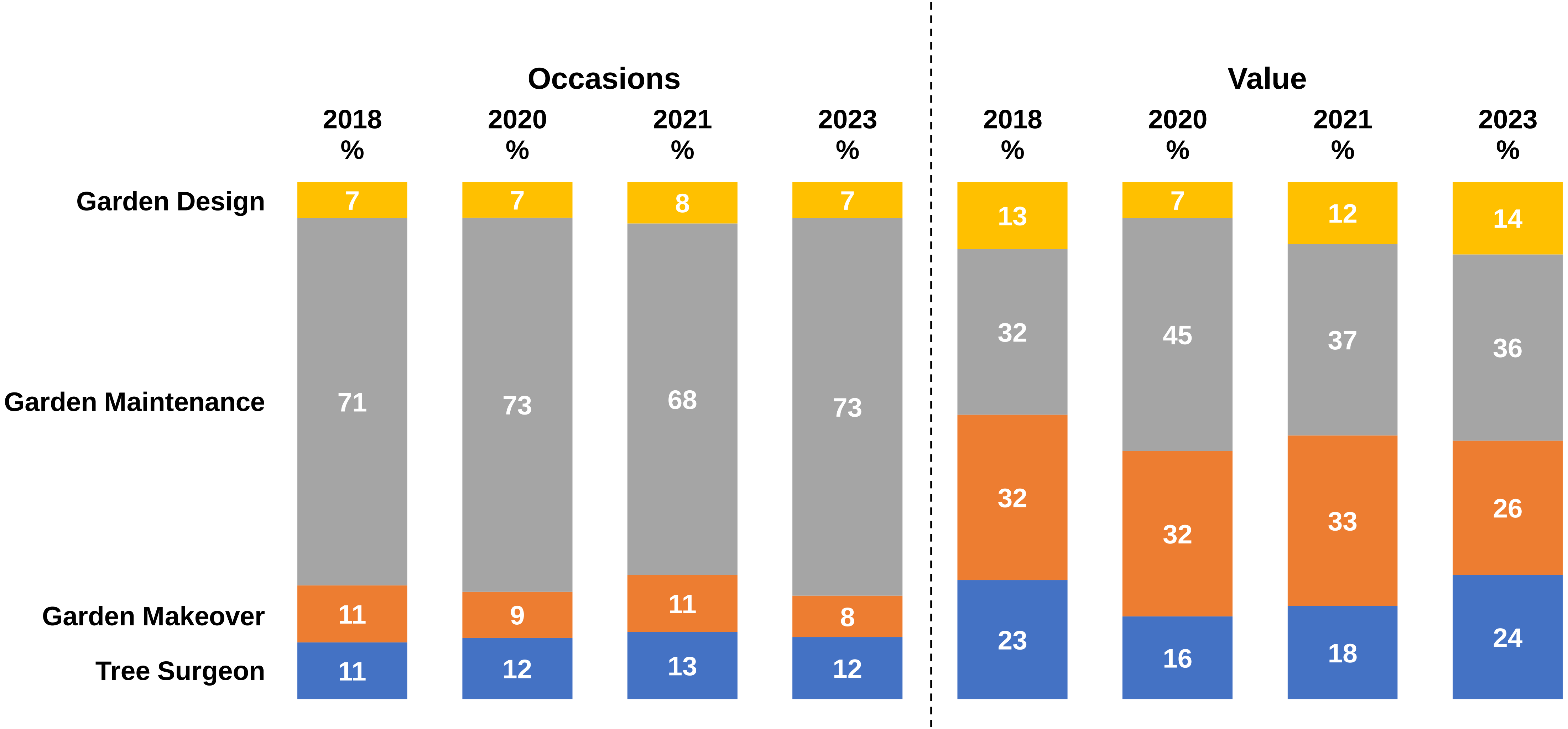
Landscaping Services – Summary



Landscaping Services – Share of Market



Gardening Market Survey
Full Year 2023
Management Report
Thank you!

February 2024

BORD BIA
Thinking House