

# Value of the Garden Market Full Year 2016

March 2017

Growing the success of Irish food & horticulture

***Bord Bia***  
Irish Food Board

# Introduction

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# Background & Objectives

- ✓ Ipsos MRBI has been tracking consumer activity and spend in the amenity 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 amenity products.
- ✓ 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, garden trellising and fencing, and other items such as sleepers and bricks for building in the garden).

# 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 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 21% since 2001. The number of households has increased by a third over the same period. The population is ageing – the number of over 65's has risen since 2011 by 13% alone..
- ✓ Unemployment now stands at less than 7%, and is continuing to decline.
- ✓ New housing unit completions peaked in Ireland in 2006, but only about 13,000 private houses were completed in 2016, only marginally higher than in 2015.
- ✓ The average age of the first time buyer of a home is 34 – up from 29 in 2006.
- ✓ Inflation (CPI) averaged 0% in 2016.
- ✓ Retail sales (value) are increasing with an overall increase across all businesses of 3.5%. New car sales were (and continue to be) one of the key drivers of retail sales improvements.

# Market Size Summary

# Market Summary – If you have just five minutes...

- ✓ The amenity market is showing strong signs of recovery among consumers, particularly in the areas of outdoor and flowering plants.

Spend on outdoor and flowering plants has increased by a third since 2014.

All products measured are exhibiting growth to varying degrees; the biggest increases in spend are evident in hanging baskets and pre-planted containers, herbaceous plants, shrubs (which had been in decline until now) and bulb/flower seeds.

- ✓ Although spend on GYO products has climbed since the last measure, the increase in value appears to be coming from the same core base of buyers, spending more per purchase occasion.

Spend on trees/hedges is up just 5% since 2014 – hopefully an upward trend in house building will provide impetus for this area.

- ✓ Independent Garden Centres are consolidating their market share . Discounters are making further gains, particularly in volume terms, and are taking share from traditional supermarkets.

# Market Summary – If you have just five minutes...

- ✓ Spend on indoor potted plants has increased since 2014 – after several years of the market appearing to be contracting.

Purchases of indoor potted plants for the home (as opposed to as a gift or special occasion) have increased in popularity since 2011. Could this be a sign of prosperity returning?

The market for garden products is showing further growth since 2014 – mainly in the area of ornamental garden products, such as garden furniture and BBQ equipment.

- ✓ Spend on BBQ equipment in particular has grown strongly since measurement began back in 2001. Significantly, 60% of spend is by those under the age of 35 – and so a good entrée in to the amenity market?

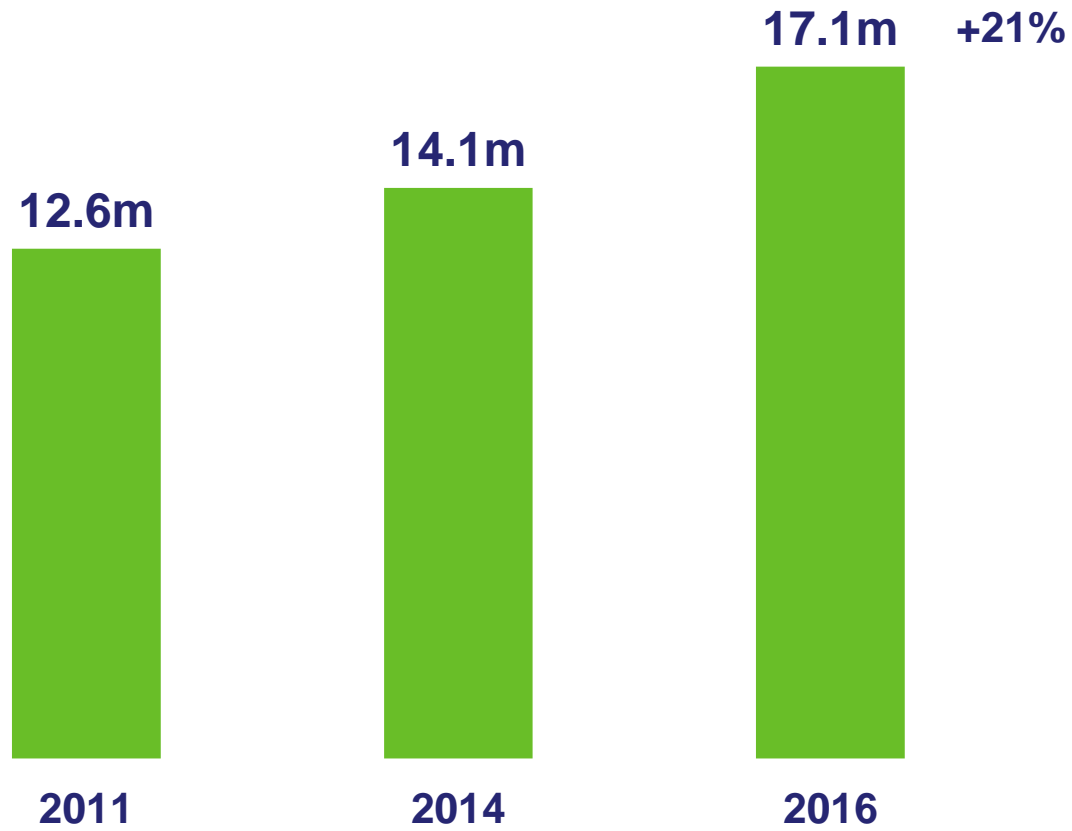
- ✓ The popularity of decks – which soared during the Celtic tiger years, seems to have been replaced by the enduring alternative of paving/gravel.

- ✓ Spend on landscaping services is also on the increase, though at a more modest level than seen across the plants and garden products areas; spend on garden makeovers or overhauls appears to be favoured over paying for a garden designer to draw up plans for a garden.

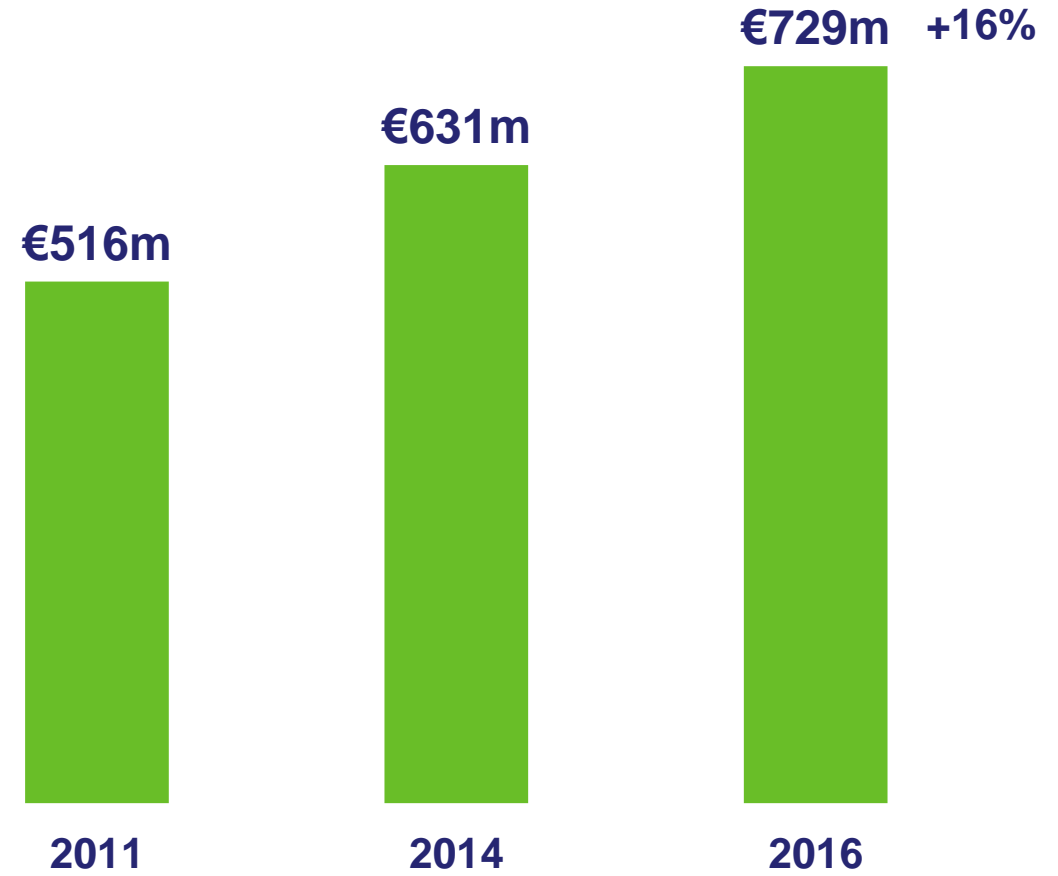


# Amenity Market Size

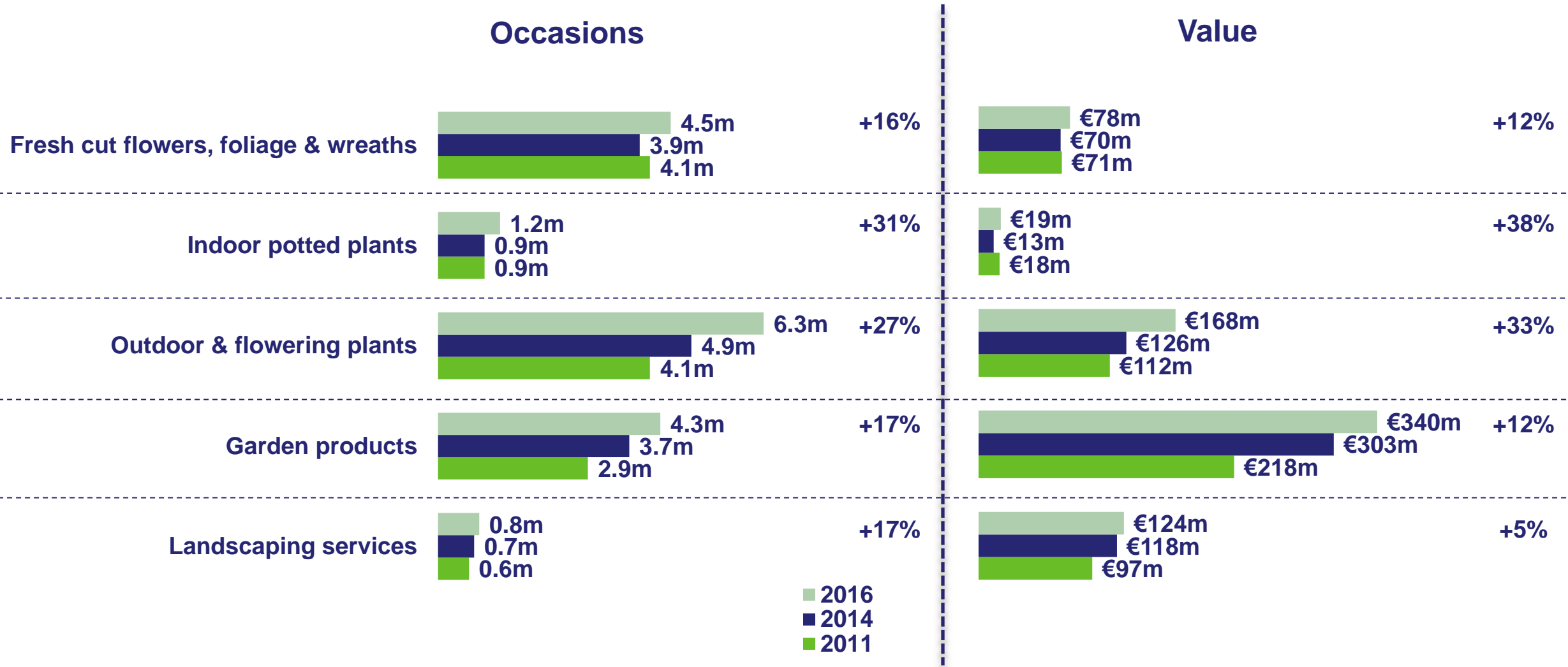
## Occasions



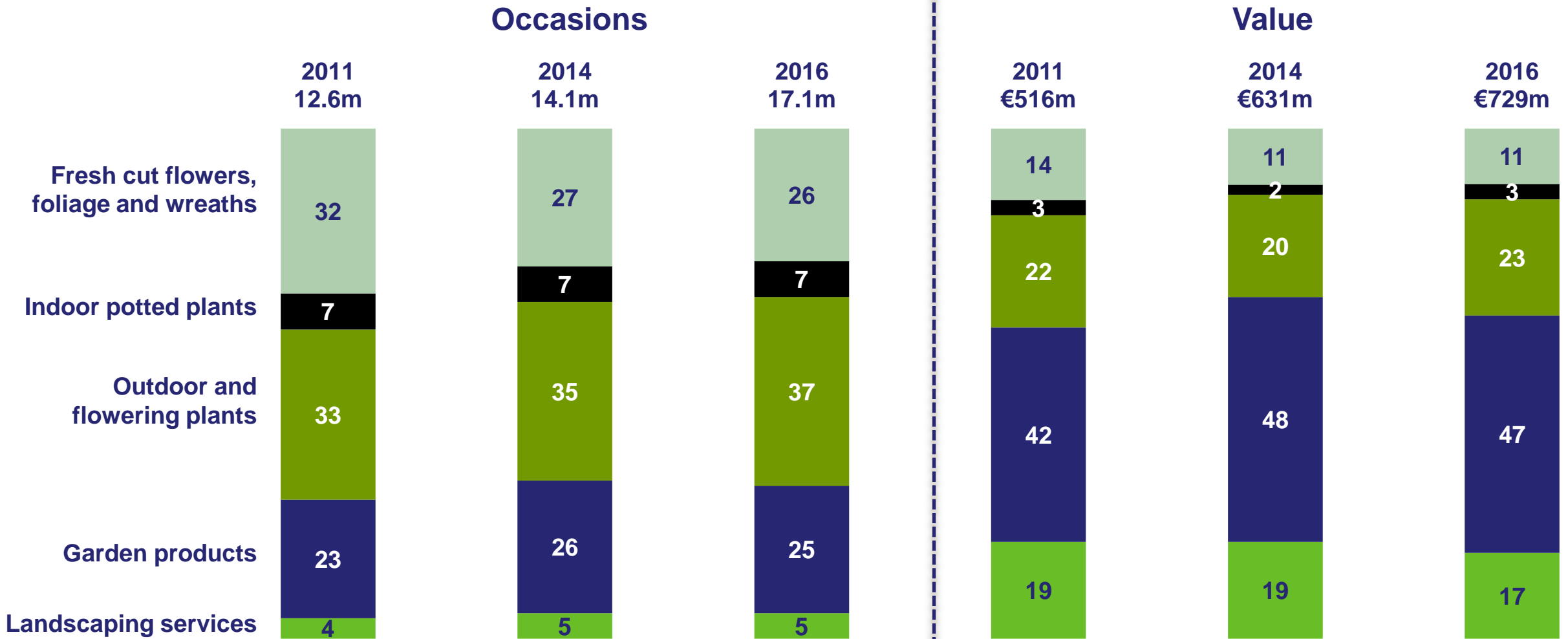
## Value



# Amenity Market Size X Category

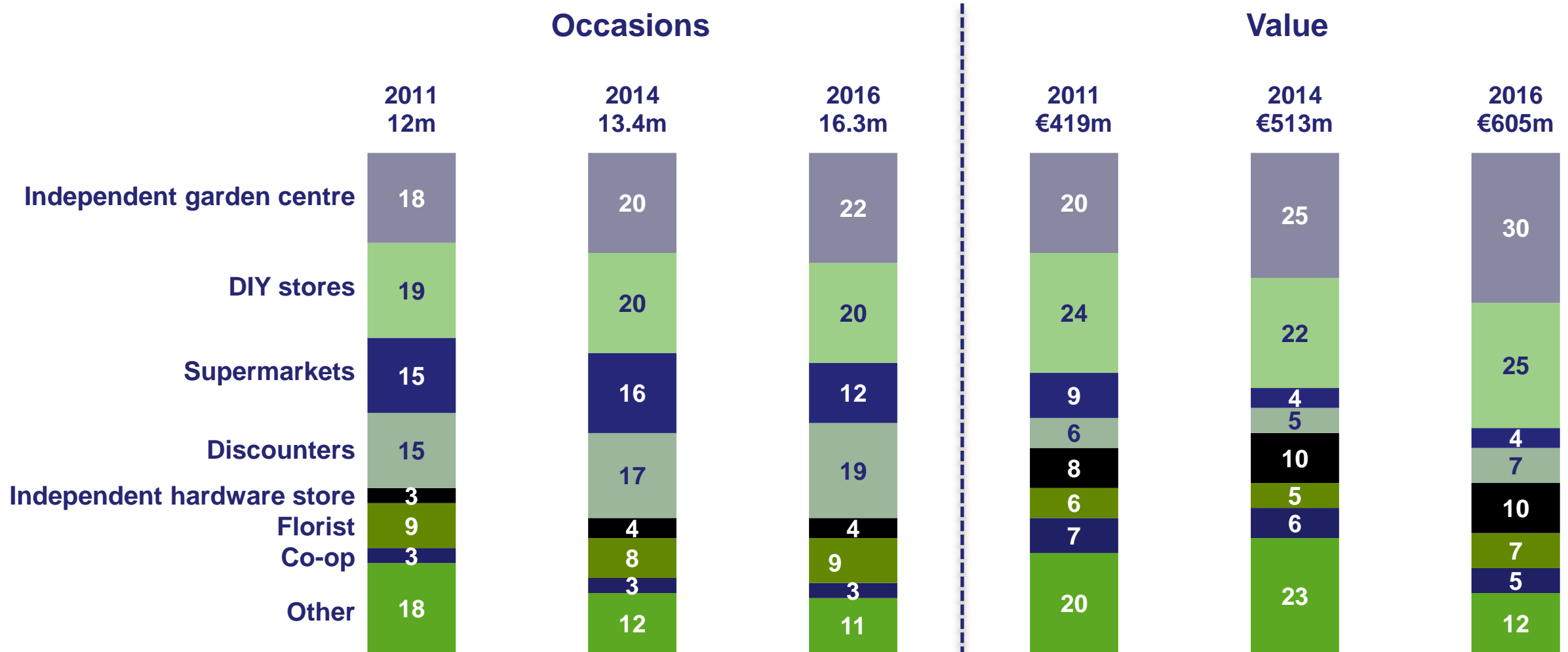


# Amenity Market Size – Share of Market



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# Amenity Market\* X Share of Channel



\*Excludes landscaping services

# Outdoor And Flowering Plants

# Outdoor And Flowering Plants Category

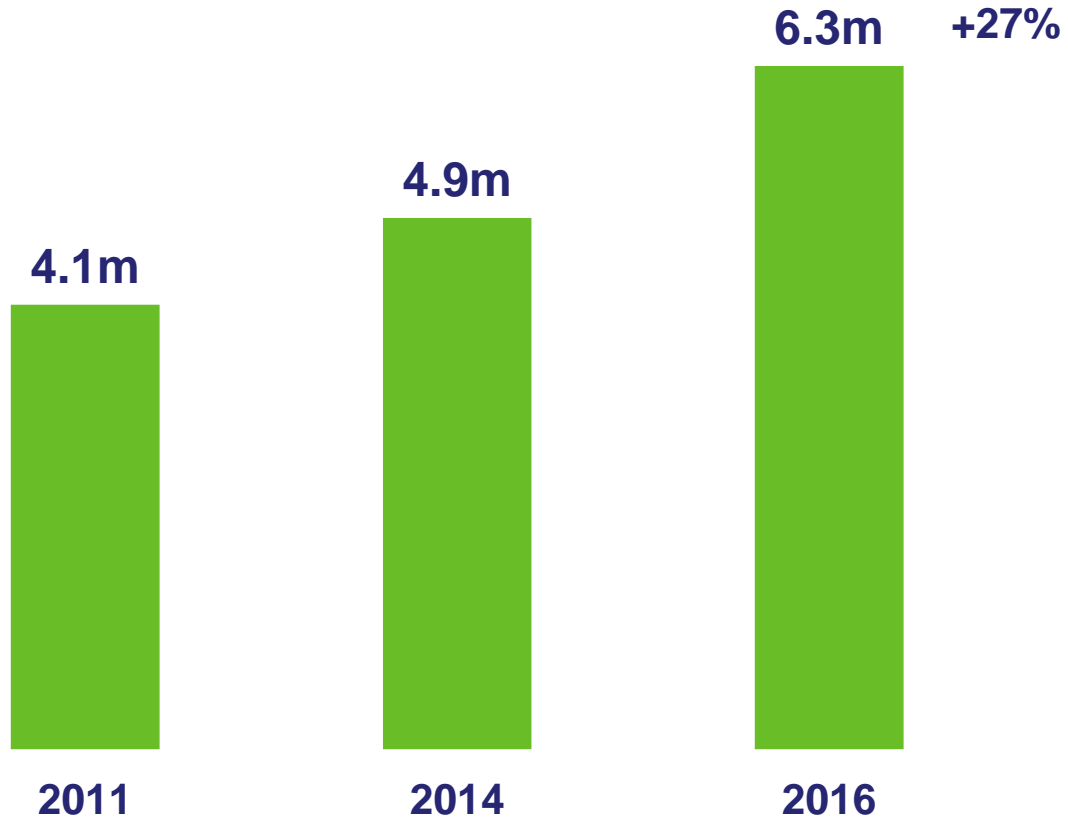


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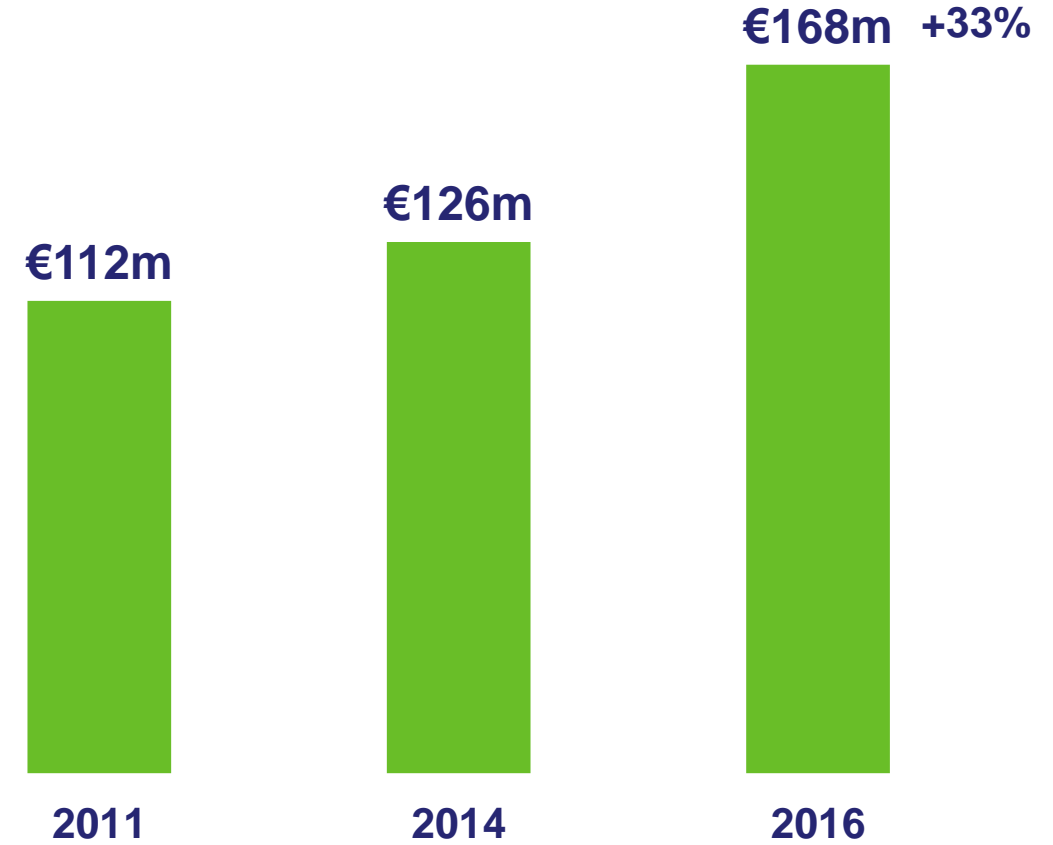
- Pre-planted hanging baskets or outdoor containers
- Bulbs/flower seeds for planting (e.g. daffodils, sweet pea )
- Trees/hedges
- Shrubs
- Bedding plants (e.g. wallflowers, primroses, geraniums, lobelia, petunias, pansies)
- Herbaceous plants (plants that die down in the winter and grow again in the 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

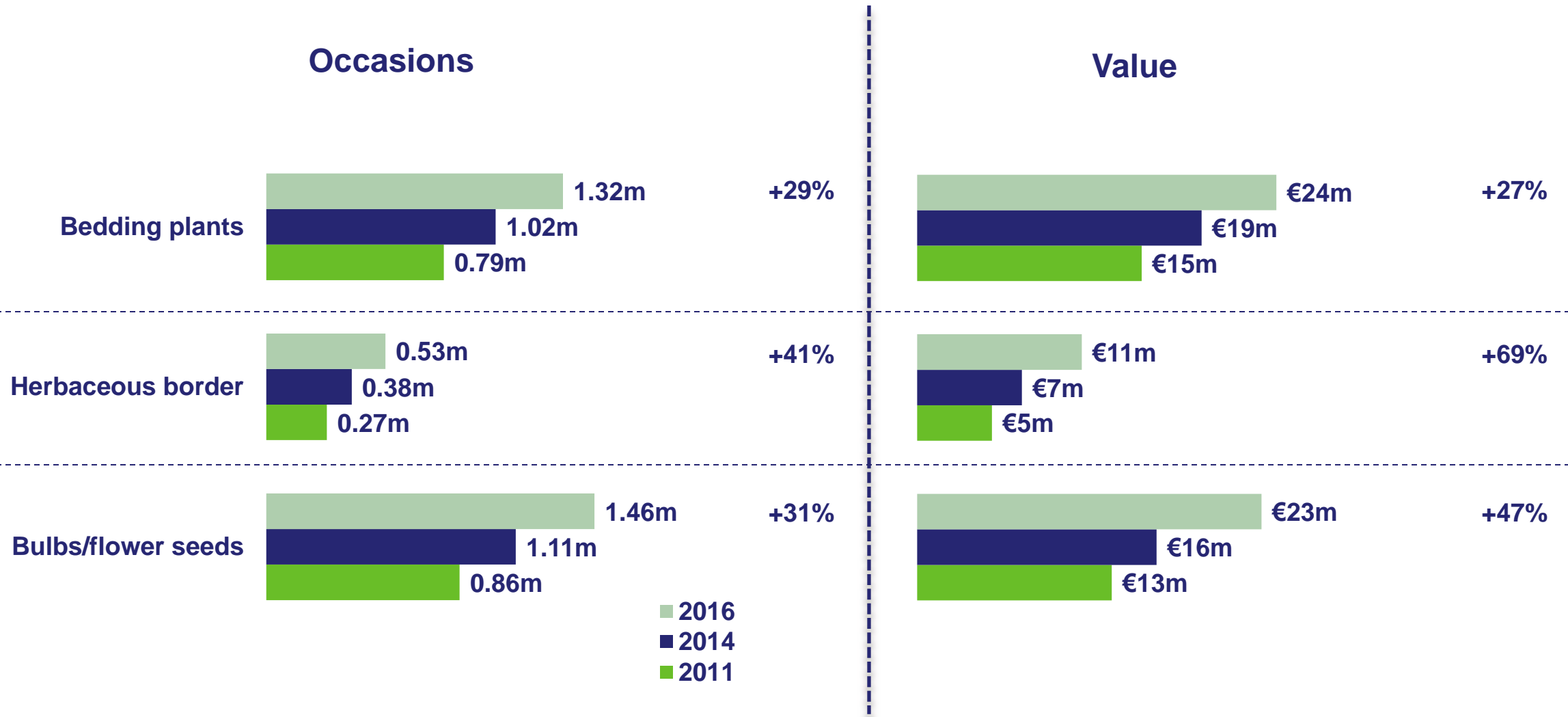
## Occasions



## Value

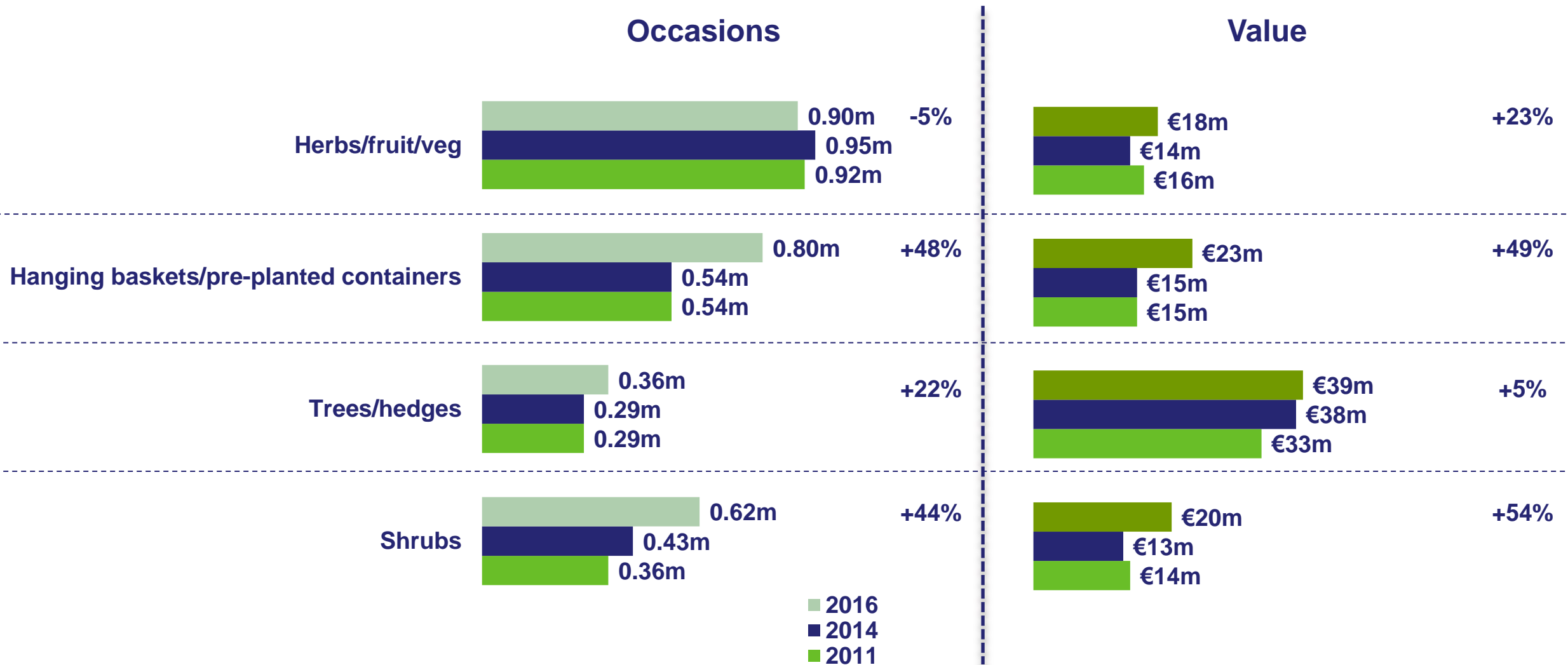


# Outdoor & Flowering Plants: Products Breakdown

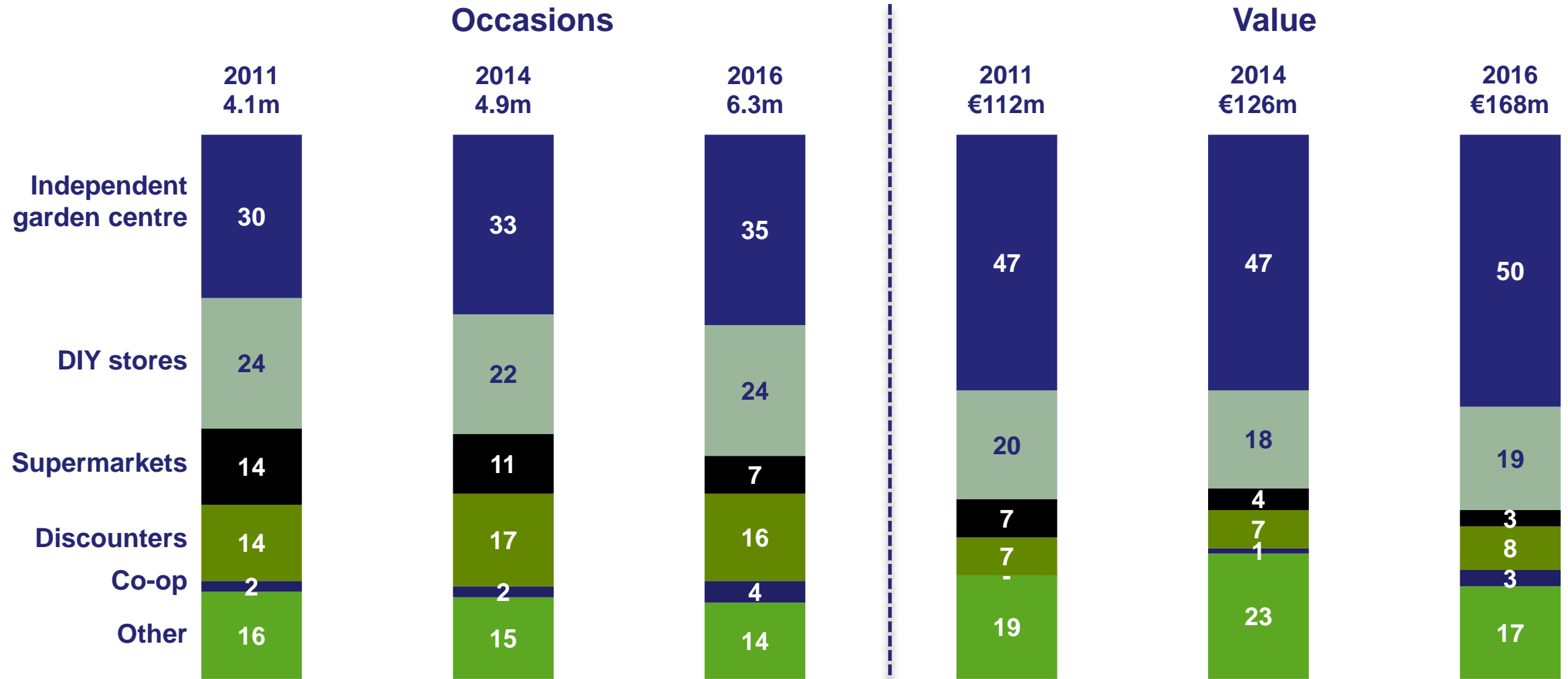




# Outdoor & Flowering Plants: Products Breakdown



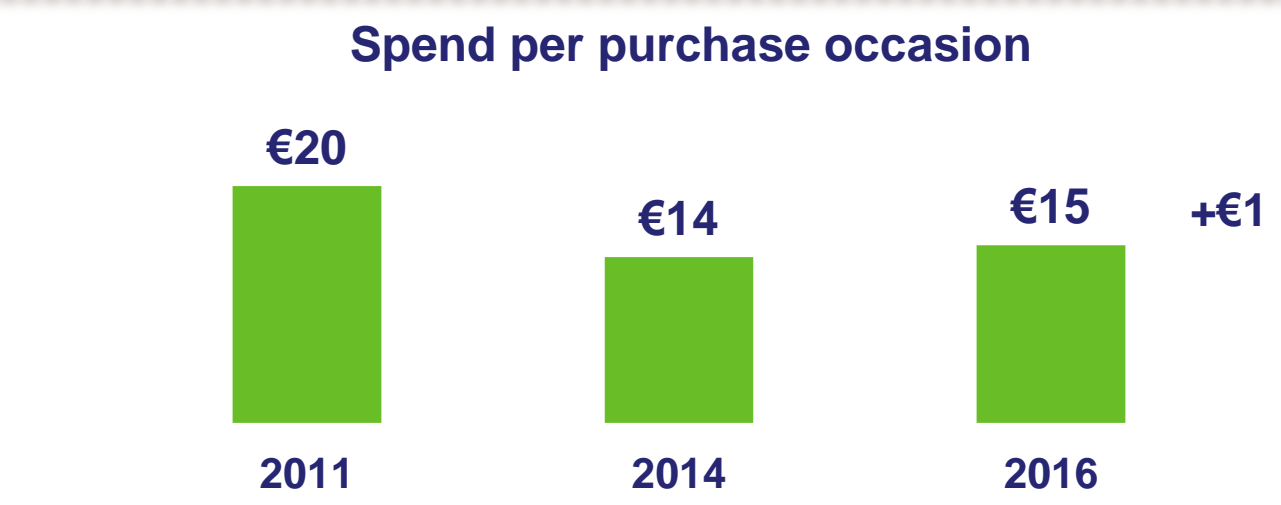
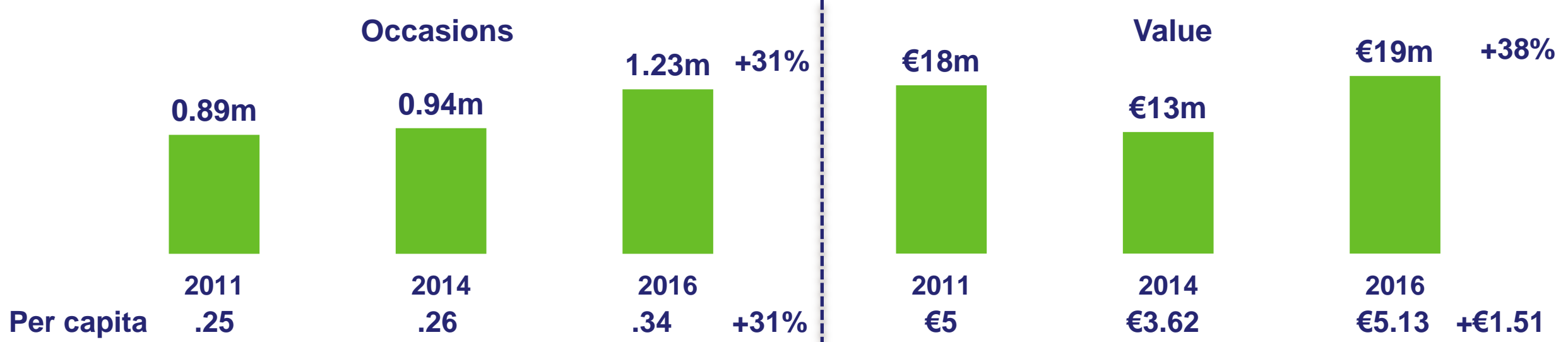
# Outdoor & Flowering Plants X Share of Channel



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# Indoor Potted Plants

# Indoor Potted Plants – Summary



- ### Key Demographics
- 40% of spend on indoor potted plants is made by over 55s.
  - Discounters are stealing volume market share from supermarkets, but Independent Garden Centres and DIY stores, account for just over half of the market value.
  - A fifth of all purchase occasions are as a gift or for a special occasion.

# Garden Products

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# Garden Products Category

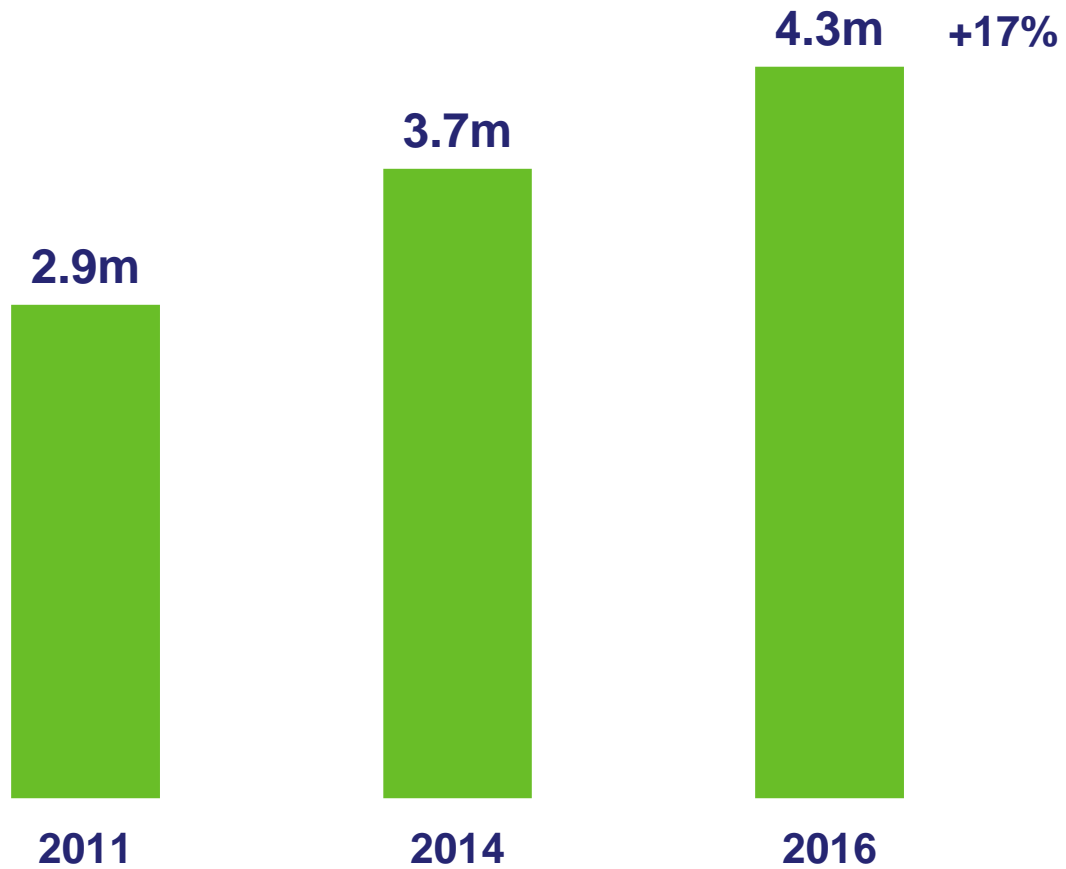


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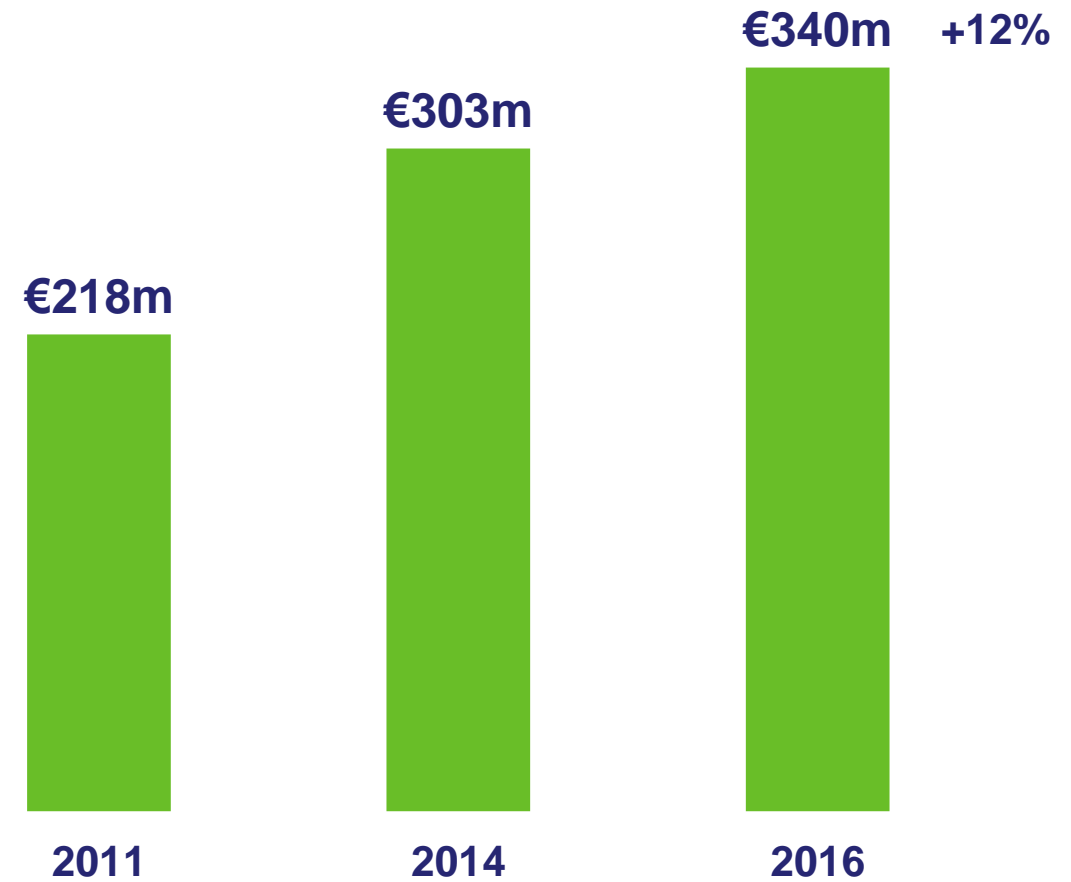
- Garden treatment (e.g. feed, fertiliser and pesticides)
- Peat/bark/soil treatment (e.g. wood chippings/bag of peat/manure)
- Garden accessories (e.g. sculptures, fountains, pots, containers)
- Paving/decorative stones/gravel
- Decking
- BBQ equipment
- Garden furniture (e.g. tables, chairs, outdoor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

# Garden Products – Summary

## Occasions



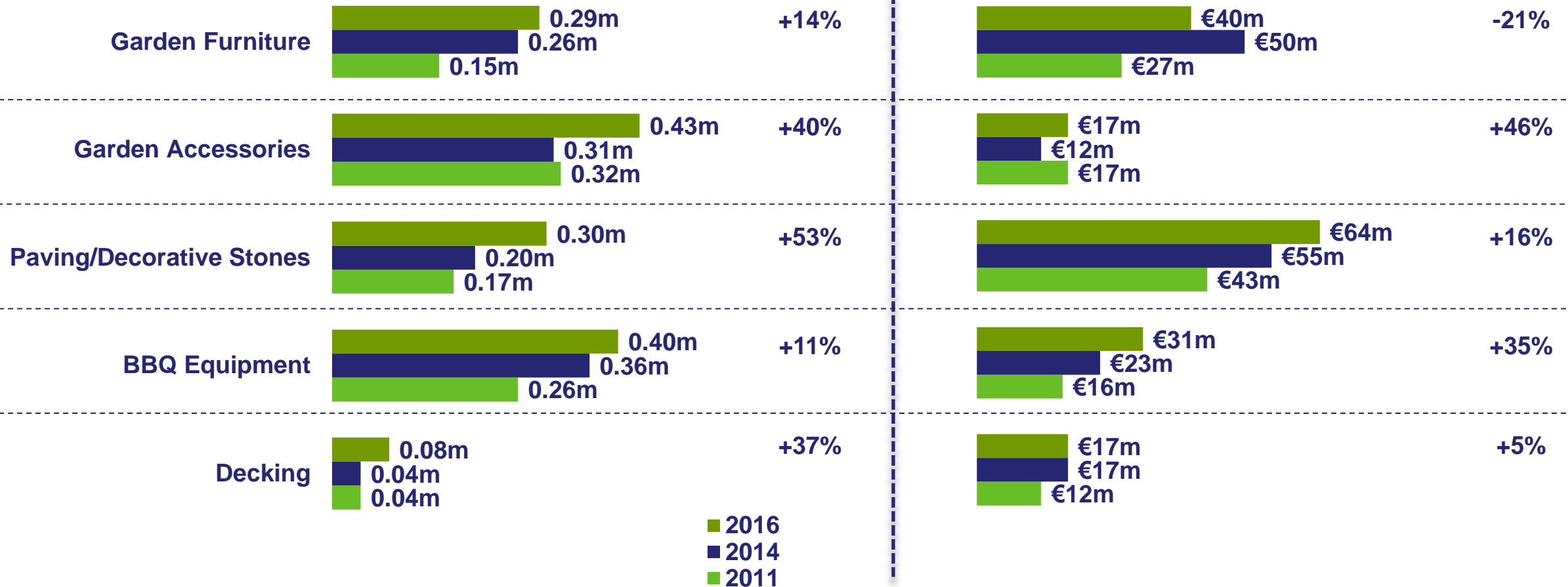
## Value



# Garden Products: Ornamental

## Occasions

## Value





# Garden Products: Functional

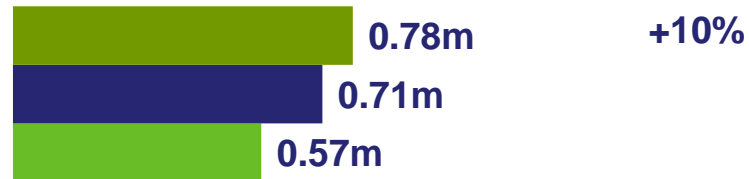
## Occasions

## Value

Garden Treatment



Peat/Bark/Soil Treatment

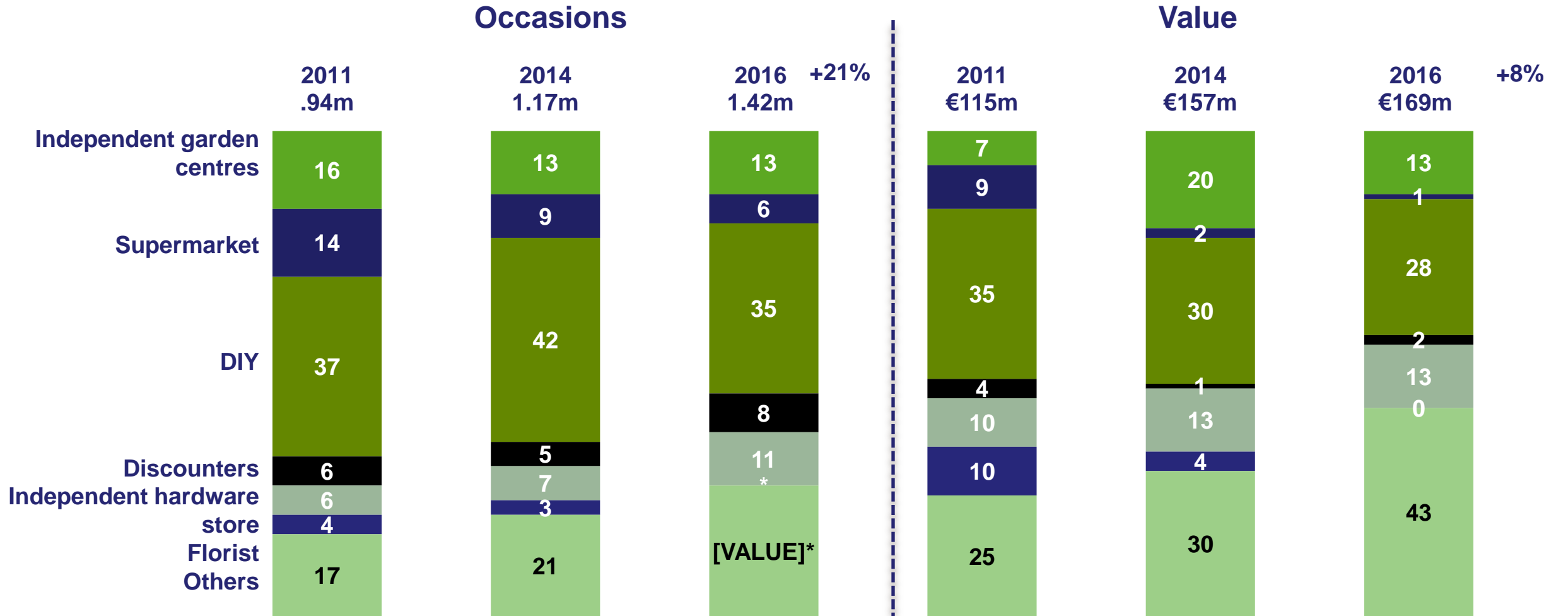


Gardening Tools/Equipment



■ 2016  
■ 2014  
■ 2011

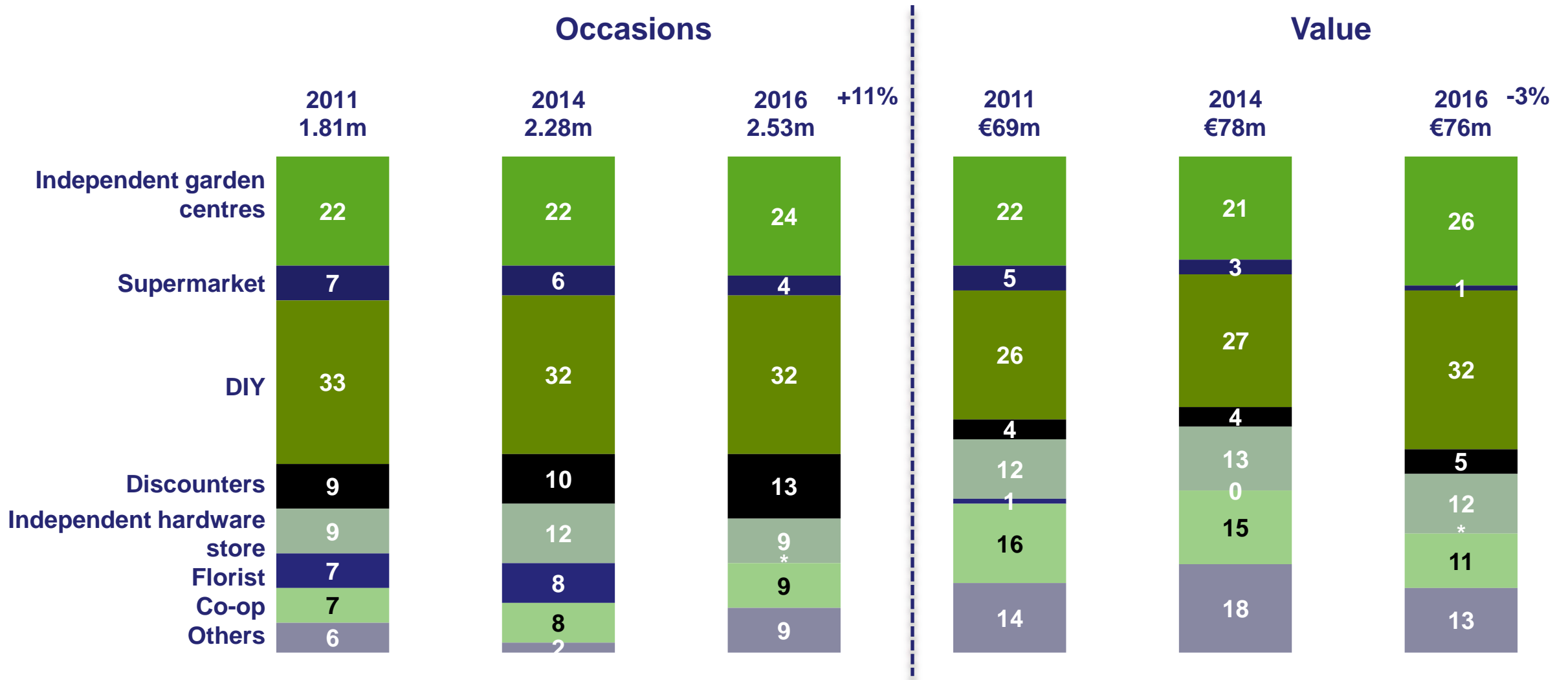
# Ornamental Garden Products X Share of Channel



\*(2016: 4% Co-op, Homestore & More, each)

\*(2016: 13% Builders' Merchants, 3% Co-op, Heatons/Homestore each)

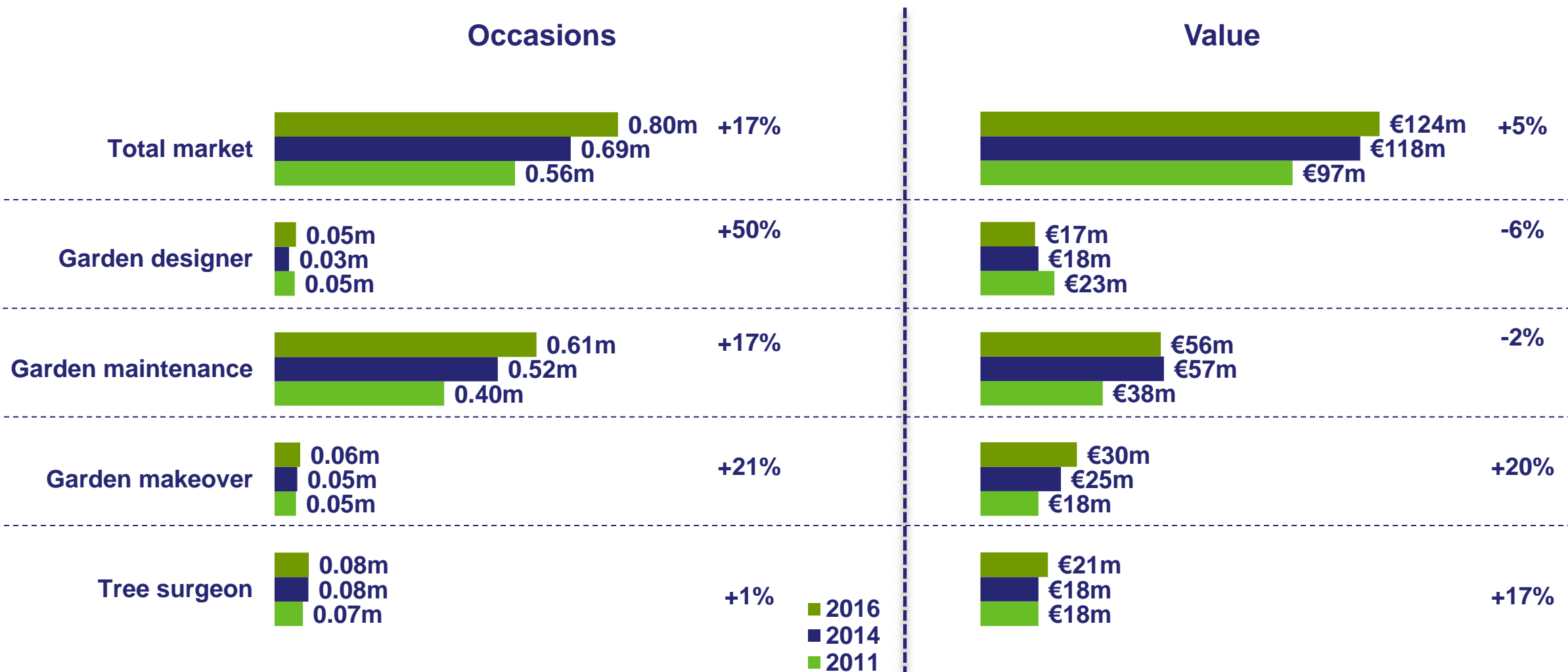
# Functional Garden Products X Channel



# Landscaping Services

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# Landscaping Services – Summary



# Value of the Garden Market Full Year 2016

for further information contact: [info@BordBia.ie](mailto:info@BordBia.ie)

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