

Garden Products Retailing - UK - June 2019

Report Price: £1995.00 | \$2693.85 | €2245.17

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"The garden centre sector has seen a huge change in 2018-19 as the largest specialist chain, Wyevale, has been broken up and stores sold to a variety of buyers. As a result, Dobbies has bought a large number of garden centres and jumped into first place as the largest specialist chain. Many other groups have also been transformed in scale by acquiring stores from Wyevale."
Jane Westgarth, Senior Retail Analyst

This report looks at the following areas:

- **Is the trend for private renting depressing demand for gardening?**
- **How will online retailing of garden products develop?**
- **After the sweeping changes of 2018-19 – which garden centre groups have benefited?**

DIY chains are significant players in garden products but the sector has had its difficulties. Homebase has been through turmoil under the ownership of Wesfarmers, which, after two years decided to sell it to a new owner, Hilco Capital, which has since been restoring order and rebuilding the slimmed-down chain's strengths, including reinvesting in garden areas. B&Q has also sold off excess outlets over recent years and has been building its own-label ranges, as well as making gardening more accessible to novice gardeners.

Newer competitors the Range and B&M have taken the opportunity to accelerate their store expansion programmes, by buying up some former DIY sites. B&M now has 157 stores with outdoor garden departments, making it a substantial player in garden product retailing, and is differentiated from most competitors by focusing on lower prices."

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DID YOU KNOW?

This report is part of a series of reports, produced to provide you with a more holistic view of this market

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75% agree that gardening is a valuable education for children

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Is the trend for private renting depressing demand for gardening?

The facts

The implications

How will online retailing of garden products develop?

The facts

The implications

After the sweeping changes of 2018-19 – which garden centre groups have benefited?

The facts

The implications

The Market – What You Need to Know

Use of the garden as an outside room drives market growth

Garden plants account for 31% of spending

Garden centres gained market share over 2013-18

87% of households have access to gardens, balconies or allotments

More hard standing in London's gardens

Over 1 million allotments in the UK

4.6% growth in number of households

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Outdoor living continues to stimulate demand

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Garden plants account for 31% of spending

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Outdoor living drives demand

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Grow-your-own has plateaued

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More living space in the garden
Encouraging birds and insects

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Garden centres have gained share of garden product retailing

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87% of households have access to gardens, balconies or allotments

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More hard standing in London's gardens

Over 1 million allotments in the UK

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Dobbies has raised standards

Destination leisure developments

DIY chains slimmer but fitter

B&Q has a four-stage garden strategy

Homebase is reviving its strengths in gardening

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Value retailers grow presence in garden retailing

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DIY chains slimmer but fitter

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Nielsen Ad Intel coverage

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The Consumer – What You Need to Know

- 87% of households have a garden or outside space
- Older bias to purchasers of gardening goods
- 18% agree they are doing more shopping online
- Garden centres appeal to age 55+
- People choose retailers based on quality of plants
- The internet is an integral part of the shopping process
- Gardens are relaxing places for leisure time
- GYO is healthier
- Children benefit from gardens

Gardens and Outside Spaces

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- Plant quality and choice are the most influential factors in shaping choice of retailer
- Convenience is a significant factor
- Creating a leisure experience

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Figure 61: Factors influencing choice of retailer, April 2019

Shopping Behaviour for Garden Products

- 41% browse online for ideas
- 11% posted garden images on social media
- Loyalty cards used by 24% of shoppers
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People associate gardens with relaxation

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65% agree that gardening is enjoyable

Taking pride in the garden

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People think home-grown vegetables are healthier

Protecting the environment

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75% agree that gardening is a valuable education for children

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