

Garden Product Retailing - UK - 2022

Report Price: £2195 | \$2995 | €2600

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

This report looks at the following areas:

- The impact of the cost-of-living crisis on the sector
- What the sector will look like post-COVID-19
- How UK consumers shop for garden products and what they buy
- Consumer satisfaction with garden product retailers
- Attitudes towards gardens, garden products and gardening

Despite broad pandemic-driven uncertainty experienced by many consumers in 2020 and 2021, the garden product retail sector saw sales surge by 10% and 20%, respectively. With consumers spending more time at home, they redirected spend away from other sectors toward home improvement projects.

The good times cannot last forever, however, and events in 2022 present a serious challenge to the sector. Surging inflation amid continued global COVID-19 uncertainty, a supply chain crisis and the conflict in Ukraine has led to a cost-of-living crisis for consumers in the UK. Gardening is a hobby and ultimately a discretionary sector. When times get tough and budgets get tighter, retailers may well see consumers cutting back spend on their garden projects.

This is the biggest threat to the garden product sector in the year ahead. The fact that 28% of consumers are reporting that personal finances are tight, struggling or in trouble, combined with the perception that the hobby is expensive (46%), means that the sector could lose many of the new shoppers it engaged for the first time in the pandemic-years.

It is not all bad news, however; with flexible working still common for many consumers in the UK, there is still an opportunity for retailers and brands in the sector to engage more consumers. On top of this, the new pandemic-gardeners represent a new customer base with the potential to grow their spending over their lifetimes. With 63% of consumers agreeing that gardening



"The year ahead will be a lean one for the garden product sector as a financial squeeze follows two years of remarkable pandemic-driven growth. Retailers and brands must focus on maintaining engagement with the new shoppers they picked up in the last couple of years."

- Piers Butel, Retail Analyst,
June 2022

Buy this report now

Visit store.mintel.com

EMEA +44 (0) 20 7606 4533

Brazil 0800 095 9094

Americas +1 (312) 943 5250

China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100

Garden Product Retailing - UK - 2022

Report Price: £2195 | \$2995 | €2600

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

is complicated for beginners, retailers should be focused on how to continue to engage beginners to keep them within the sector.

MINTEL

What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

Did you know?

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

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

Buy this report now

Visit store.mintel.com

EMEA +44 (0) 20 7606 4533

Brazil 0800 095 9094

Americas +1 (312) 943 5250

China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Table of Contents

OVERVIEW

- Key issues covered in this Report
- Market context
- Products covered in this Report

EXECUTIVE SUMMARY

- **The five-year outlook for the garden products sector**
Figure 1: Category outlook, 2022-27
- **The market**
- **Market size and forecast**
Figure 2: Market size for garden products sector, 2018-22
- **2022 growth will be low and inflation-driven**
Figure 3: Market forecast for garden product sector, 2017-27
- **Garden plants and garden care are the largest segments**
- **Garden centres take top spot in 2021**
- **Planned drops as inflation concerns grow**
Figure 4: Trends in spending on the home, 2020-22
- **Companies and brands**
- **Garden centres diversify offerings to broaden appeal**
- **New technology in-store to help customers learn more and find products**
- **Advertising expenditure recovers in 2021 but remains below pre-pandemic levels**
- **The consumer**
- **Almost nine in 10 consumers have access to some sort of outdoor space**
Figure 5: Gardens and outdoor spaces, 2022
- **Some 79% of those with an outdoor space have purchased garden products**
Figure 6: Purchases for gardens and outside spaces, year-on-year comparison, 2021 and 2022
- **In-store retail still important for consumers**
Figure 7: In-store or online shopping, 2022
- **Sector is fragmented with many channels at play**
Figure 8: Retailers used to purchase garden products, 2021 and 2022
- **Shoppers are satisfied with their choices**
Figure 9: Satisfaction with key factors at garden product retailer shopped at most frequently, 2022
- **Shoppers are satisfied with their choices**
Figure 10: Attitudes towards gardens, garden products and gardening, 2022

What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

Did you know?

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

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

Buy this report now

Visit store.mintel.com

EMEA +44 (0) 20 7606 4533

Brazil 0800 095 9094

Americas +1 (312) 943 5250

China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100



The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

ISSUES AND INSIGHTS

- **Cost-of-living crisis represents a challenge for the sector**
- **New gardeners need support; the sector should help them**

MARKET SIZE AND PERFORMANCE

- **Pandemic-struck 2020 saw consumers turn to gardening**
- **2021 saw garden sales surge further amid high demand**
- **2022 to see growth slow despite rising prices**

Figure 11: market size for garden products sector, 2018-22

Figure 12: Market size chart, 2017-22

MARKET FORECAST

- **Immediate outlook is uncertain for garden sector**
Figure 13: Category outlook, 2022-27
- **2022 growth driven by inflation**
- **End of restrictions will see focus shift away from the home**
- **Flexible working means consumer demand will be maintained**
- **Uncertainty as the world continues to struggle with unknown factors**

Figure 14: Market forecast for garden product sector, 2017-27

- **Learnings from the last income squeeze**
Figure 15: Consumer spending on garden products, 2019-14
- **Market drivers and assumptions**
Figure 16: Key economic drivers, 2016-26
- **Forecast methodology**

MARKET SEGMENTATION

- **Cost-of-living crisis to see consumers cut back on big-ticket items**
Figure 17: Garden market segmentation, broad segments, 2021 and 2022
- **Consumers to switch spend to lower-ticket items**
- **Supply-chain disruption to remain an issue for some segments**

Figure 18: Garden market segmentation, by segment, 2018-22

CHANNELS TO MARKET

- **Garden centres take top spot in 2021**
Figure 19: Retailers used for garden products, 2022
- **Food options at garden centres help bring shoppers in-store**
- **DIY retailers continue to offer more for gardeners**
- **Financial uncertainty can give discounters an edge**
- **Shoppers turn to online for furniture, tools and cooking items**

What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

Did you know?

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

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

Buy this report now

Visit store.mintel.com

EMEA +44 (0) 20 7606 4533

Brazil 0800 095 9094

Americas +1 (312) 943 5250

China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100



The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Figure 20: Use of online-only retailers for garden products by category, 2022

MARKET DRIVERS

- **The conflict in Ukraine will hurt the UK economy**
- **GDP reached pre-pandemic levels in November 2021...**
- **...but the post-COVID-19 bounce back will be followed by a period of slower growth**
- **Employment has held up better than expected**
- **Inflation is the key concern for 2022 for consumers, brands and the economy**
- **Consumers' financial wellbeing has slipped from its recent high point...**

Figure 21: Household financial wellbeing index, 2018-22

- **...and concerns over inflation are coming to the fore**
- **Majority of consumers have access to outdoor spaces**

Figure 22: Gardens and outdoor spaces, 2022

- **Older population means a greater focus on gardens**

Figure 23: Trends in the age structure of the UK population, 2016-26

- **Single occupant households continue to grow**

Figure 24: UK household occupancy, 2016 and 2021

- **Renters less likely to be keen gardeners**

Figure 25: Housing situation by age group, 2022

- **Planned spend begins to drop as inflation concerns grow**

Figure 26: Trends in spending on the home, 2020-22

COMPETITIVE STRATEGIES

- **Fiscal 2020/21 results impacted by COVID-19 pandemic and supply chain disruption**
- **Horticultural know-how and expertise a competitive differentiator**
- **Additional goods and experiences to strengthen destination appeal of garden centres**
- **Rewarding loyal customers grappling with the rapidly rising cost of living**
- **Responsible retailing high on the agenda**

Figure 27: Garden centres, turnover, 2016/17-2020/21

- **Slowdown in garden centres acquisition activity following Wyevale break-up**

Figure 28: Little Dobbies store, Bristol, 2022

Figure 29: Garden centres, store numbers, 2016/17-2021/22

- **Fewer browsers in-store drag on 2020/21 store sales**

What's included

- Executive Summary
- Full Report PDF
- Infographic Overview
- Powerpoint Presentation
- Interactive Databook
- Previous editions

Did you know?

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

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

Buy this report now

Visit	store.mintel.com
EMEA	+44 (0) 20 7606 4533
Brazil	0800 095 9094
Americas	+1 (312) 943 5250
China	+86 (21) 6032 7300
APAC	+61 (0) 2 8284 8100

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Figure 30: Garden centres, sales per outlet, 2016/17-2020/21

- **Non-specialists’ ramp up garden and outdoor living offering**

LAUNCH ACTIVITY AND INNOVATION

- **Plants at the click of a button**
- **Spear and Jackson collaborate with leading influencer to offer expert hints and tips**
- **New garden megastore expected to attract 1 million visitors per annum**
- **One of the UK’s largest food halls opens in Crimble garden centre**
- **Improving gardening skills**
- **Plant pot recycling initiative to help prevent plastic waste ending up in landfill**
- **Time-saving ‘Plant Finder’ touchscreen kiosk**
- **Garden products from used coffee grounds**
- **Fridge-like gardening gadget that makes it easy to grow plants inside, any time of the year**

Figure 31: LG’s Tiun indoor-garden, 2022

- **eCommerce-ready garden furniture to help retailers with their online sales**

ADVERTISING AND MARKETING ACTIVITY

- **Advertising expenditure recovers in 2021 but still below pre-pandemic levels**

Figure 32: Total recorded above-the-line, online display and direct mail advertising expenditure on garden products, 2018-21

- **End of COVID-19 restrictions coincide with big surge in barbecue advertising spend**

Figure 33: Total recorded above-the-line, online display and direct mail total advertising expenditure on garden products (20 largest categories), 2018-21

- **B&Q the highest-spending advertiser on garden products**

Figure 34: Total recorded above-the-line, online display and direct mail advertising expenditure on garden products, by leading advertisers, 2018-21

- **TV, digital and press account for three quarters of the total advertising expenditure**

Figure 35: Total recorded above-the-line, online display and direct mail advertising expenditure on garden products, by media type, 2021

- **Nielsen Ad Intel coverage**

What's included

- Executive Summary
- Full Report PDF
- Infographic Overview
- Powerpoint Presentation
- Interactive Databook
- Previous editions

Did you know?

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

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world’s leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

Buy this report now

Visit	store.mintel.com
EMEA	+44 (0) 20 7606 4533
Brazil	0800 095 9094
Americas	+1 (312) 943 5250
China	+86 (21) 6032 7300
APAC	+61 (0) 2 8284 8100



The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

GARDENS AND OUTSIDE SPACES

- **88% of consumers have access to an outdoor space, but one in 10 have an extremely small space**

Figure 36: Gardens and outdoor spaces, April 2022

- **The most prolific garden products purchasers are also the most likely to have a private garden or outdoor space**

Figure 37: Access to gardens/outdoor spaces by age, 2022

SHOPPING FOR THE GARDEN

- **Purchasing level unchanged on a year earlier**

Figure 38: Purchases for gardens and outside spaces, year-on-year comparison, 2021 and 2022

- **Women the most prolific garden products purchasers**
- **Higher-income consumers the biggest purchasers of garden products**

Figure 39: Purchases for gardens and outside spaces, 2022

IN-STORE AND ONLINE SHOPPING

- **Garden products purchasing process shifting back in-store**

Figure 40: In-store or online shopping, 2022

- **In-store advice and information peaks among Baby Boomer and Gen Z shoppers**

Figure 41: In-store or online shopping, by age, 2022

RETAILERS USED TO PURCHASE GARDEN PRODUCTS

- **Garden centres take top spot for garden products in 2022**
- **DIY store ranges skew towards furniture but continue to broaden**
- **Online only retailers and supermarkets offer convenience options**

Figure 42: Retailers used to purchase garden products, 2021 and 2022

- **Garden centres attract older consumers**
- **Younger shoppers most likely to pick up items in supermarkets**

Figure 43: Retailers used to purchase garden products, by age, 2022

SATISFACTION WITH GARDEN PRODUCT RETAILERS

- **Consumers generally satisfied with garden product retailers**

Figure 44: Overall satisfaction with garden product retailer shopped at most frequently, 2022

- **Quality, availability and choice are satisfactory**

What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

Did you know?

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

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

Buy this report now

Visit store.mintel.com

EMEA +44 (0) 20 7606 4533

Brazil 0800 095 9094

Americas +1 (312) 943 5250

China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100



The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

- **Sustainability and product information are areas for improvement**

Figure 45: Satisfaction with key factors at garden product retailer shopped at most frequently, 2022

KEY DRIVER ANALYSIS FOR GARDEN PRODUCT SHOPPING

- **Methodology**
- **Consumers are happy with breadth of range, quality and availability**
- **Retailers could improve on information they provide**
- **Sustainability offers a way for retailers to differentiate themselves**

Figure 46: Key drivers of overall satisfaction with garden product retailers, April 2022.

Figure 47: Overall satisfaction with garden product retailers - key driver output, April 2022

ATTITUDES TOWARDS GARDENS AND GARDEN PRODUCTS

- **Consumers willing to pay more for ethical products**
- **Environmentally friendly materials and good causes appeal**
- **Good causes can also help generate good will**

Figure 48: Attitudes towards garden products and ethical practices, 2022

- **Novice gardeners need help to start and maintain the hobby**
- **The cost of the hobby is an area of concern for consumers**

Figure 49: Attitudes towards gardening as hobby, 2022

- **Good food can help generate footfall**

Figure 50: Attitudes towards garden retailers and on-site food, 2022

- **Encourage young gardeners with good food**

Figure 51: Interest in food service at garden retailers, 2022

APPENDIX – DATA SOURCES, ABBREVIATIONS AND SUPPORTING INFORMATION

- **Abbreviations**
- **Consumer research methodology**

APPENDIX: KEY DRIVER ANALYSIS

- **Interpretation of results**

Figure 52: Overall satisfaction with GARDEN PRODUCT RETAILERS - key driver output, APRIL 2022

Figure 53: Satisfaction with garden product retailers, april 2022

What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

Did you know?

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

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

Buy this report now

Visit	store.mintel.com
EMEA	+44 (0) 20 7606 4533
Brazil	0800 095 9094
Americas	+1 (312) 943 5250
China	+86 (21) 6032 7300
APAC	+61 (0) 2 8284 8100



The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

APPENDIX – FORECAST METHODOLOGY

- **Market forecast and prediction intervals**

Figure 54: Mintel forecast with intervals, 2022-27

Figure 55: Mintel market size and forecast at constant prices, 2017-27

- **Market drivers and assumptions**

- **Forecast methodology**

What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

Did you know?

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

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

Buy this report now

Visit store.mintel.com

EMEA +44 (0) 20 7606 4533

Brazil 0800 095 9094

Americas +1 (312) 943 5250

China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100



About Mintel

Mintel is the **expert in what consumers want and why**. As the world's leading market intelligence agency, our analysis of consumers, markets, product innovation and competitive landscapes provides a unique perspective on global and local economies. Since 1972, our predictive analytics and expert recommendations have enabled our clients to make better business decisions faster

Our purpose is to help businesses and people grow. To find out how we do that, visit **[mintel.com](https://www.mintel.com)**.