

FOR IMMEDIATE RELEASE JANUARY 2012

Domestic Decking and Landscaping Materials Market Report - UK 2012-2016 Analysis

New AMA report reviews decking and landscaping materials market in the UK and considers future prospects.

"The **domestic** landscaping materials market was worth over **£900 million** in 2011 at manufacturers' prices. The market as a whole has been negatively impacted by the general effects of the downturn, and in particular by the difficult housebuilding and house moving markets and by restrained consumer spending. Positive underlying drivers for the market focus around several key themes, including:- 'improve not move', interest in 'grow your own' and the 'garden as an extension of living space.'"

A brief summary of the report is included on the following page.

Priced at £675, the report is currently available from AMA Research Ltd, Telephone 01242 235724 or e-mail at sales@amaresearch.co.uk.

Editors Note:

Attached is a summary of the report. Please use brief extracts if you wish, **but we would request that references to company market shares are not published without our prior permission.**

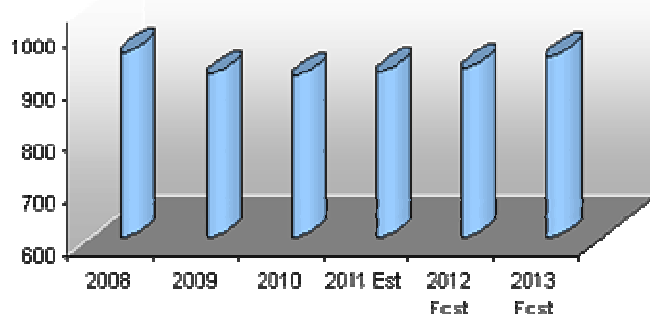
If you would like to receive an editorial review copy or would like to speak to an author of this report, please contact Andrew Hartley or Chris Moore on (01242) 235724.

Please include our web address and telephone number on any review printed, it would also be appreciated if a copy of the review could be forwarded to AMA Research. Thank you.

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UK Market for Domestic Landscaping Materials, 2008 – 2013 by value (£M at MSP)



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The weather remains a key factor in this market. Mild weather can encourage sales of plants, bulbs and seeds, and extend the period during which construction projects can

take place in the garden. Poor weather can result in a boost to sales of products like fencing, for example, where replacement is required because of storm damage.

The core of the market remains stable. Whilst larger projects such as installing garden buildings have seen reduced sales during the recession, the plants, bulbs, and seeds sectors have prospered. These are non-essentials, but typically low cost and hobby-based and regarded as affordable products by many, even in the downturn.

Decking and landscaping materials is a fragmented market consisting of a very wide range of products distributed via a range of distribution channels. Key products are paving & walling (19%), fencing/trellis & garden structures (8%), decking (4%), aggregates (4%), pots & planters (10%), water features & decorative products (6%), nursery stock & bedding plants (38%) and bulbs & seeds (9%). After a period of strong growth, decking is now mature and stable - over 90% of decking installations are wood, though some other niche materials such as composites have taken share in recent years.

The paving and walling sector has been hit hard in the difficult economic climate in 2009-2011, declining by around 20%. However, the market has seen a wide range of new products incorporating drainage features alongside hard standing becoming available on the market in response to new planning rules introduced in 2008 - and recovery is forecast for 2013-2016.

The market for pots and planters has been a good performer in 2009-11, maintained by continued interest in 'grow your own', based on a solid existing gardening market. This is a highly competitive sector, reflecting a combination of a fragmented product range and many low cost imports, but steady annual growth of 2-3% is forecast over the next few years.

Key distribution channels for domestic landscaping materials are Garden Centres and DIY Multiples, with a combined share of around 60%. Builders Merchants account for over 15%, virtually all in hard landscaping materials. Consolidation in the distribution sector is continuing with a number of developments since the last edition of this report.

The internet has been gaining share as a distribution channel across many markets, offering consumers perceived greater value and the convenience of shopping from home. Mail order is a well established channel for bulbs, seeds and plants - and is likely to remain a strong channel among more serious gardeners.

Given the current macro economic climate in early 2012, forecasting future market performance is extremely difficult at this time due to uncertainty over the speed and timing of recovery from the downturn. Prospects for 2012/13 are for low growth, but stronger recovery is forecast for 2014-2016. Underlying demand for most landscaping products remain strong, and homeowners remain committed to improving their gardens when consumer confidence improves.

AMA Research's report "**Domestic Decking and Landscaping Materials Market Report - UK 2012-2016 Analysis**" is available in hard copy or electronic format for £675 and can be ordered online at www.amaresearch.co.uk or by calling 01242 235724.