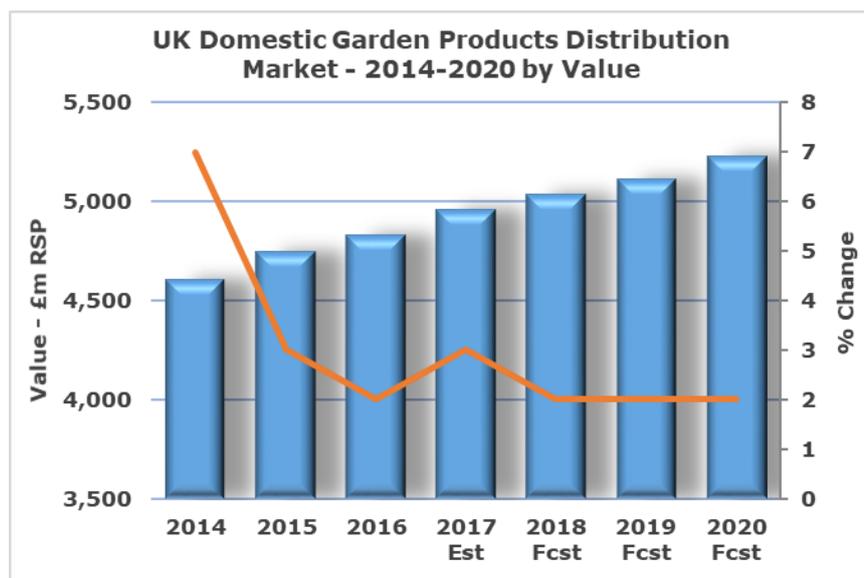




## PRESS RELEASE

### Distribution market for garden products in the UK worth around £5bn

March 2018 – Cheltenham, UK



The UK domestic garden products distribution market was worth an estimated £4.9bn in 2017 at retail selling prices (RSP), representing an increase of 3% compared to the previous year. Both the weather and the state of the economy influence growth rates within the garden products distribution market. A strong interest in home improvement, which extends to the garden, has also stimulated growth in this sector.

Source: AMA Research Ltd/Trade Estimates

Key product sectors in the market are horticulture, garden sundries and garden buildings, which all account for a share of 20% or more by value, and garden equipment, garden leisure and garden chemicals, with slightly lower shares. Each sub-sector is subject to different influences and trends, for example, investment in 'higher ticket' items such as paving, walling and conservatories may be deferred if consumer confidence drops, and fencing sales may be boosted by wet and windy weather.

Whilst some parts of the garden products market may be considered comparatively mature, such as barbecues, conservatories and garden furniture, the desire to reflect more premium materials and styles is encouraging trade up sales. Developing areas within the market include garden rooms and garden decoration. Artificial grass has also risen in popularity, given the minimal maintenance required.

A notable trend has been the desire to maximise recreational use of the garden including for socialising and dining 'al fresco'. This has helped to sustain growth in the sector as the garden is perceived as an additional room in the home. Other practical uses include use of the garden for home working and storage resulting in an increase in sales of garden buildings and clever use of space. Environmental aspects have become more prevalent, with greater concern over the provenance of materials, such as timber and ingredients used in garden control products and fertilisers.

Although demand for housing remains high in the UK, the rates of housebuilding and home moving activity have been slow in recent years, impacting negatively on the garden products market. The average size of the UK garden is also diminishing and this, coupled with an increase in apartments, has given rise to products which suit a smaller space, such as 'vertical gardens' and greater use of pots and containers which can be re-located from home to home and suit balconies.

*"The DIY sector and garden centres account for the majority of sales of garden products, reflecting their diverse product range, especially in garden equipment and leisure products, but these are facing increasing competition from other channels - in particular online specialists, but also discount chains and grocery stores"* said Fiona Watts, Editor at AMA Research. *"Although most larger DIY outlets have embraced the internet as a distribution channel, there is significant scope for existing retailers to develop internet sales, particularly in the garden centre sector."*

The UK is undergoing a period of political and economic uncertainty, as negotiations for Brexit continue. This has created a number of issues, such as potential seasonal labour shortages within the horticultural sector and the rising costs of imported garden products and components. Price competition will, however, constrain market value to some degree, despite any price increases, due to the rising cost of imports.

Our market forecasts assume moderate growth within the garden products distribution sector, from 2018 – 2022, underpinned by sustained demand for housing and interest in home improvement. The market is forecast to grow by around 2% per year until the end of the forecast period, assuming UK weather patterns over this period are not severe.

The '**Garden Products Distribution Market Report – UK 2018-2022**' report is published by AMA Research, a leading provider of market research and consultancy services with over 25 years' experience within the construction and home improvement markets. The report is available now and can be ordered online at [www.amaresearch.co.uk](http://www.amaresearch.co.uk) or by calling 01242 235724.

#### **Editors Note:**

If you would like to receive more information on the report, or would like to speak to the author, then please contact Anna Eriksson on 01242 235724.

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

AMA Research Ltd  
Montpellier House  
Montpellier Drive  
Cheltenham  
Gloucestershire GL50 1TY

Tel: +44 (0)1242 235724

Fax: +44 (0)1242 262948

E-mail: [annaeriksson@amaresearch.co.uk](mailto:annaeriksson@amaresearch.co.uk)

Website: [www.amaresearch.co.uk](http://www.amaresearch.co.uk)