

# Bord Bia Value of the Garden Market 2020

February 2021

Ipsos MRBI



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# Introduction



# 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 28% since 2001. The number of households has increased by a half over the same period.
- Unemployment now stands at 7.2%, not counting those on Covid payments.
- New housing unit completions peaked in Ireland in 2006, but only around 19,000 private houses were completed in 2020. Supply is still considerably below where it should be to meet demand.
- The average age of the first time home buyer is 34 – up from 29 in 2006.
- Covid began to impact on the economy and population in mid-March. The economy began to re-open mid-May, but it was followed by regional and then national lockdowns later in the year.
- 2018 was a challenging year weather-wise, from snow hampering the kick off of the gardening season, to prolonged heat and drought during peak season. 2020 also started poorly, but was followed by a prolonged period of unseasonably warm weather from mid-March. Weather conditions returned to normal for the summer and beyond.

# Market Size Summary

# Market Summary

- 2020 was an extraordinary year due to Covid-19. Lockdowns brought about a surge in demand for hardy nursery stock, flowering plants and hard landscaping products as gardening and garden projects became a lead pastime for many.
- The value of the gardening market was reported at €1.2bn, the highest level of spend since measurement began on this study.
- Spend on outdoor and flowering plants expanded by 51% to be worth €251m. The greatest increases were evident for bulbs/flower seeds, shrubs and bedding plants.
- Purchasing of herbs, fruit and vegetables for growing yourself reached record levels; purchasing occasions were up 38% compared with 2018, and the incidence of buying all kinds of vegetables in particular showed gains. The market value was €26m, up 42% on 2018.
- While growth in spend on trees/hedges and hanging baskets and pre-planted containers was also evident, the increases were relatively more modest – though still substantial. .

# Market Summary

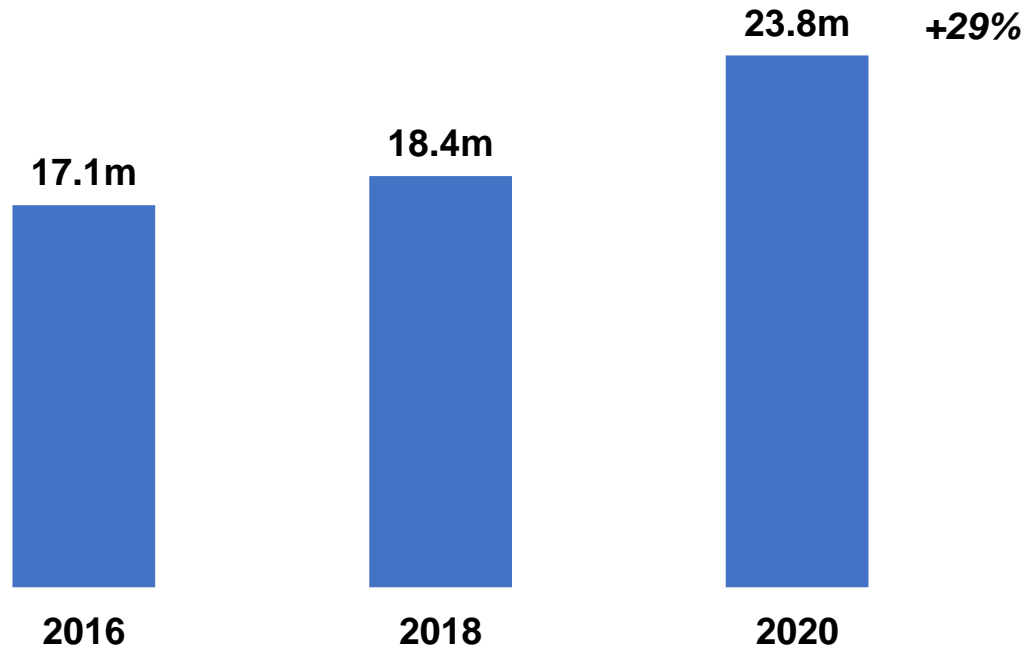
- 2020 has reinforced the resurgence in the popularity of indoor potted plants. The value of the market is now €37m, up from €25m in 2018.
- The largest increase in spend in the gardening market was on hard landscaping products. The value of the garden products category increased by 75% compared with 2018, and was worth €641m.
- The biggest uplifts in spend were reported in garden accessories, BBQs, and garden structures. However, as with soft landscaping market, all products enjoyed significant growth in spend compared with previous measures.
- Spend on landscaping services is also on the increase – almost at levels witnessed in the mid-noughties. The market was worth €164m in 2020, up from €146m in 2018. Nearly half of all spend is on garden maintenance, though spend on garden makeovers is increasing.

# Market Summary

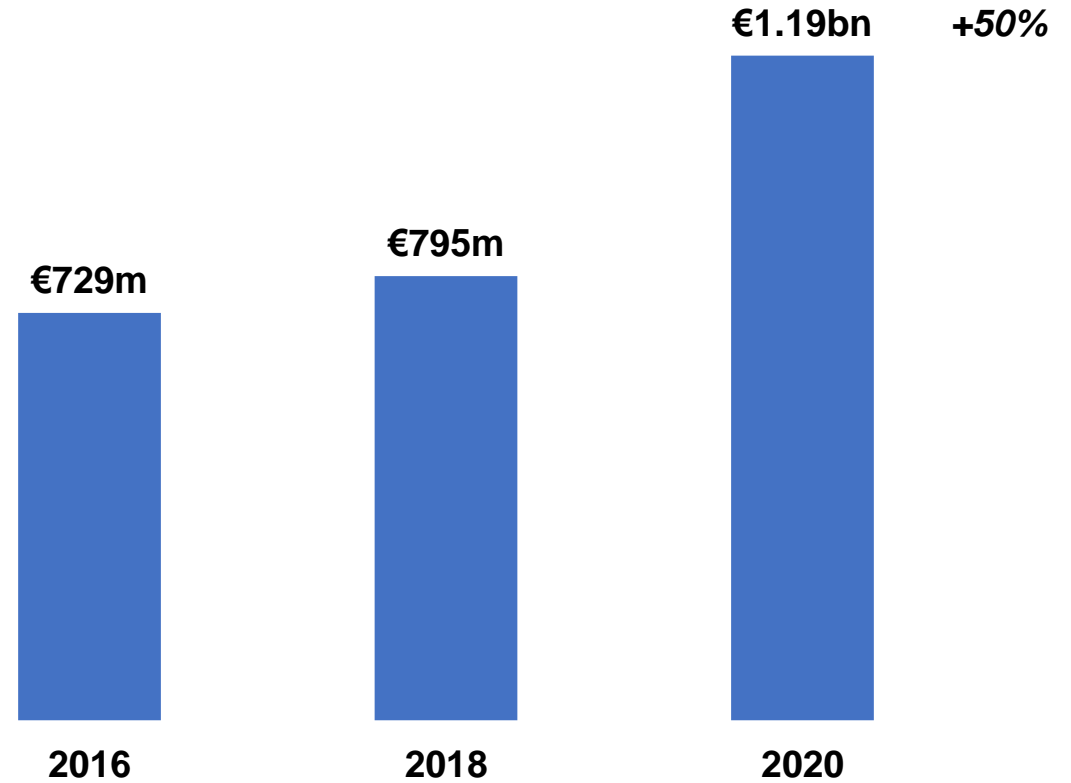
- Independent garden centres remain the single most important channel for amenity products; a quarter of all consumer spend – and almost half of spend on outdoor flowers and plants - is routed through garden centres.
- Lockdowns during 2020 impacted the DIY channel, as share contracted across all products. In contrast, on line purchasing became more prominent. 1 in 10 purchases of bulbs/flower seeds, BBQs and Garden Furniture were made on line. (It is worth noting that some on line spend may have been on DIY websites).
- Supermarkets and discounters' share of purchasing occasions for outdoor and flowering plants remained largely unchanged, despite being open throughout lockdown. There were some gains for convenience stores, albeit at low levels, and overall, 6% of spend was routed through the internet.
- For garden products, independent garden centres account for a fifth of purchasing occasions and spend. Here also, DIY share of spend contracted, while on line accounted for 9% of spend –three times higher than in 2018.

# Amenity Market Size

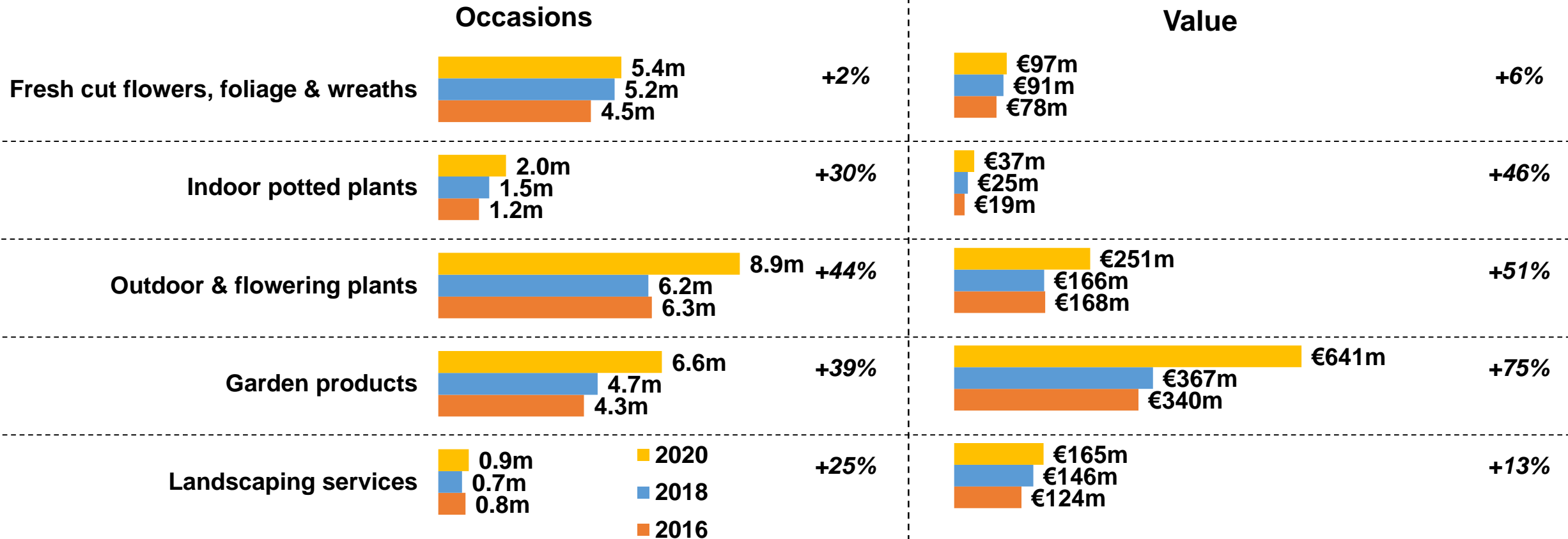
Occasions



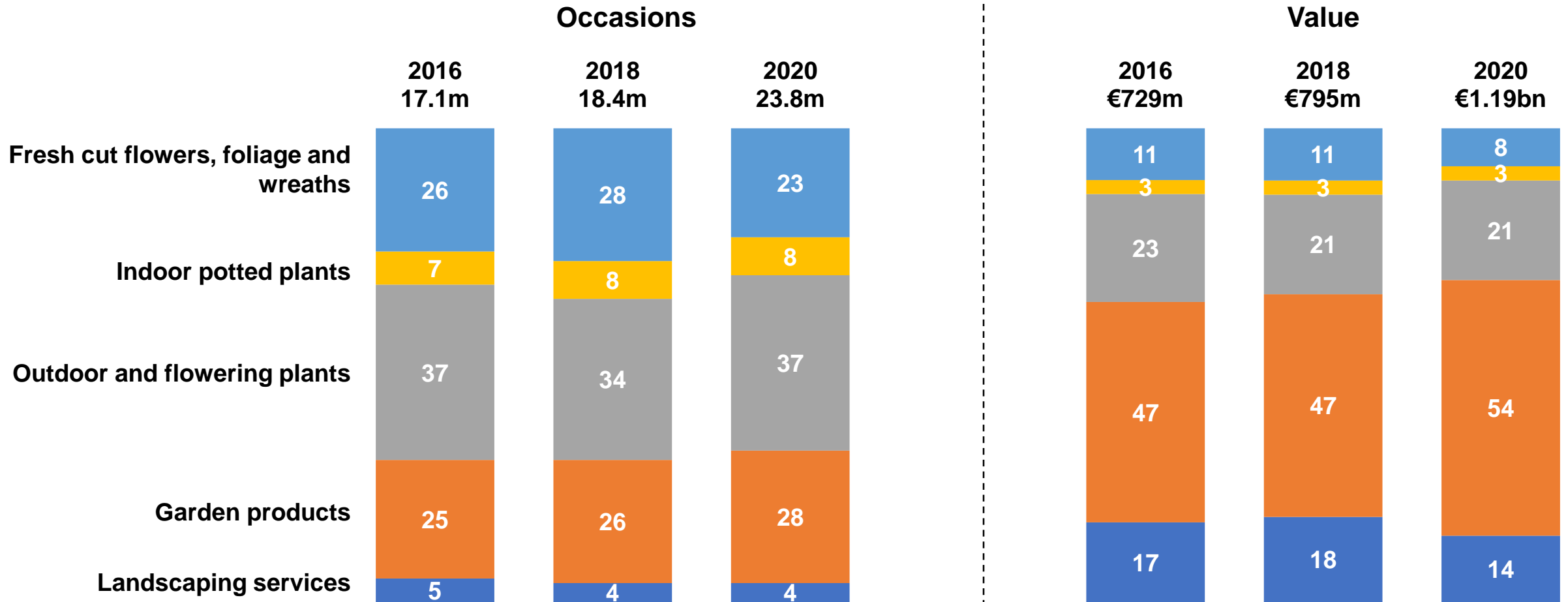
Value



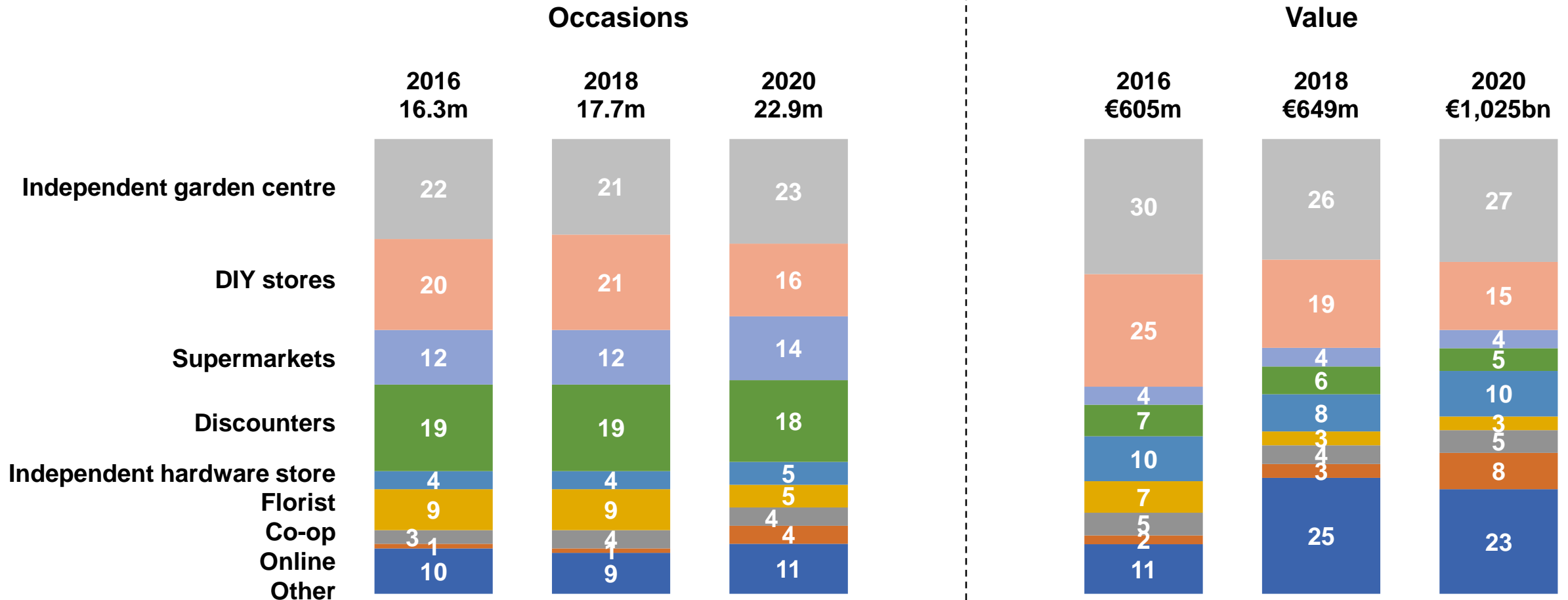
# Amenity Market Size X Category



# Amenity Market Size – Share of Market



# Amenity Market\* X Share of Channel



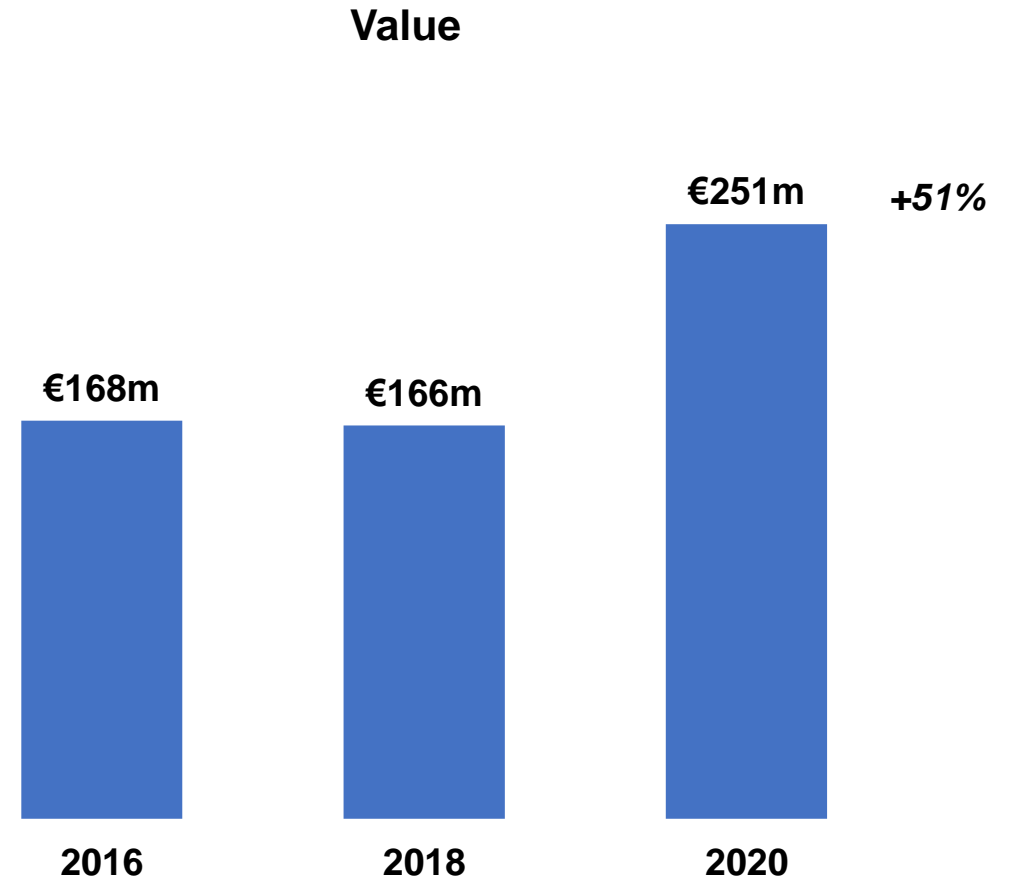
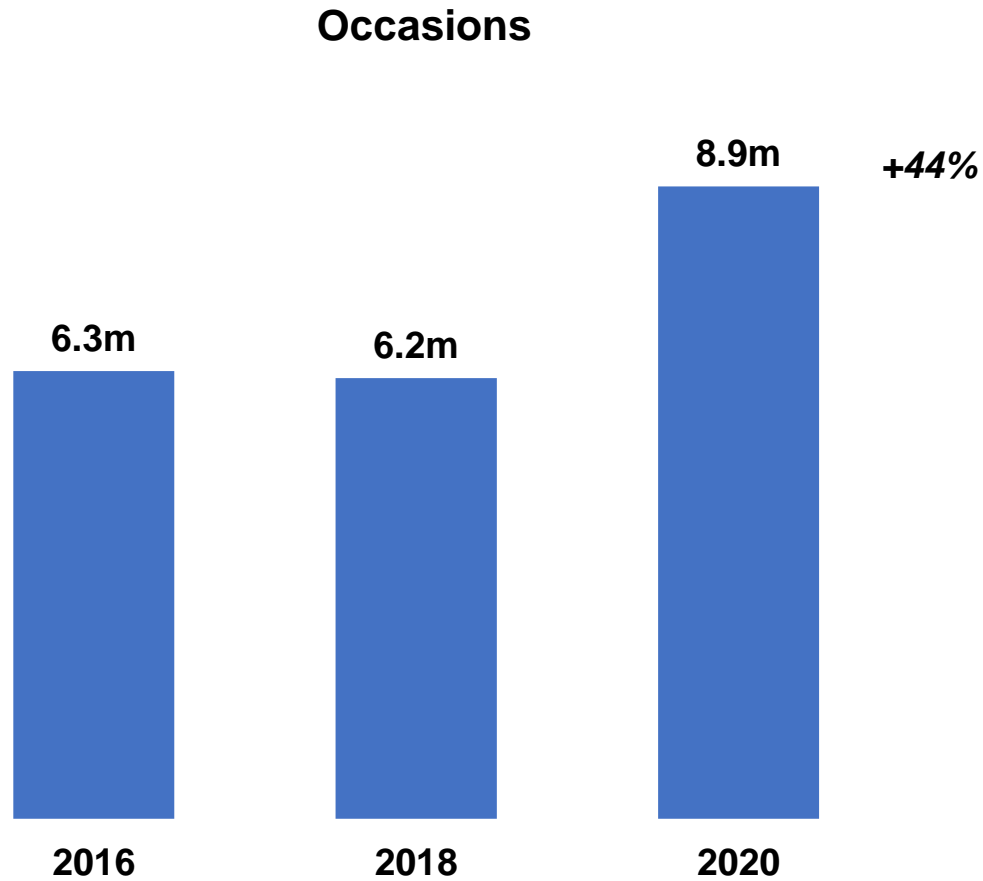
# Outdoor And Flowering Plants

# Outdoor And Flowering Plants Category

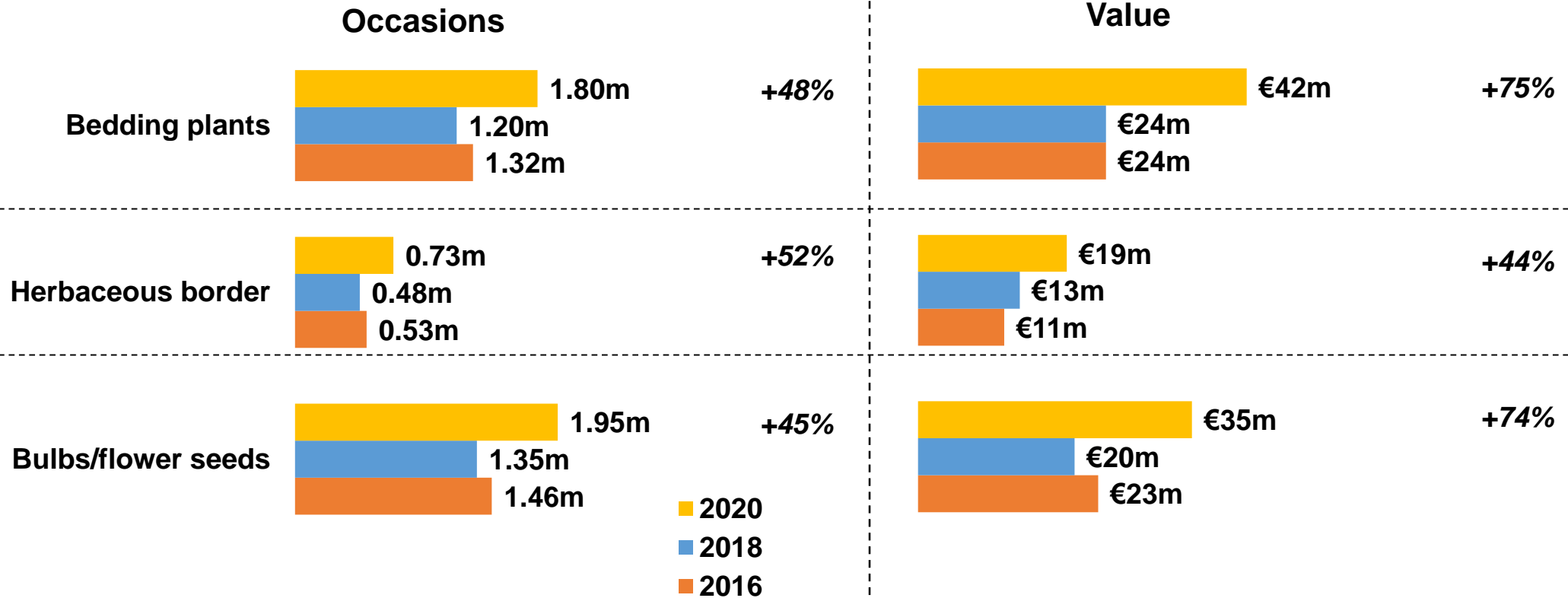
Definition includes:

- 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)

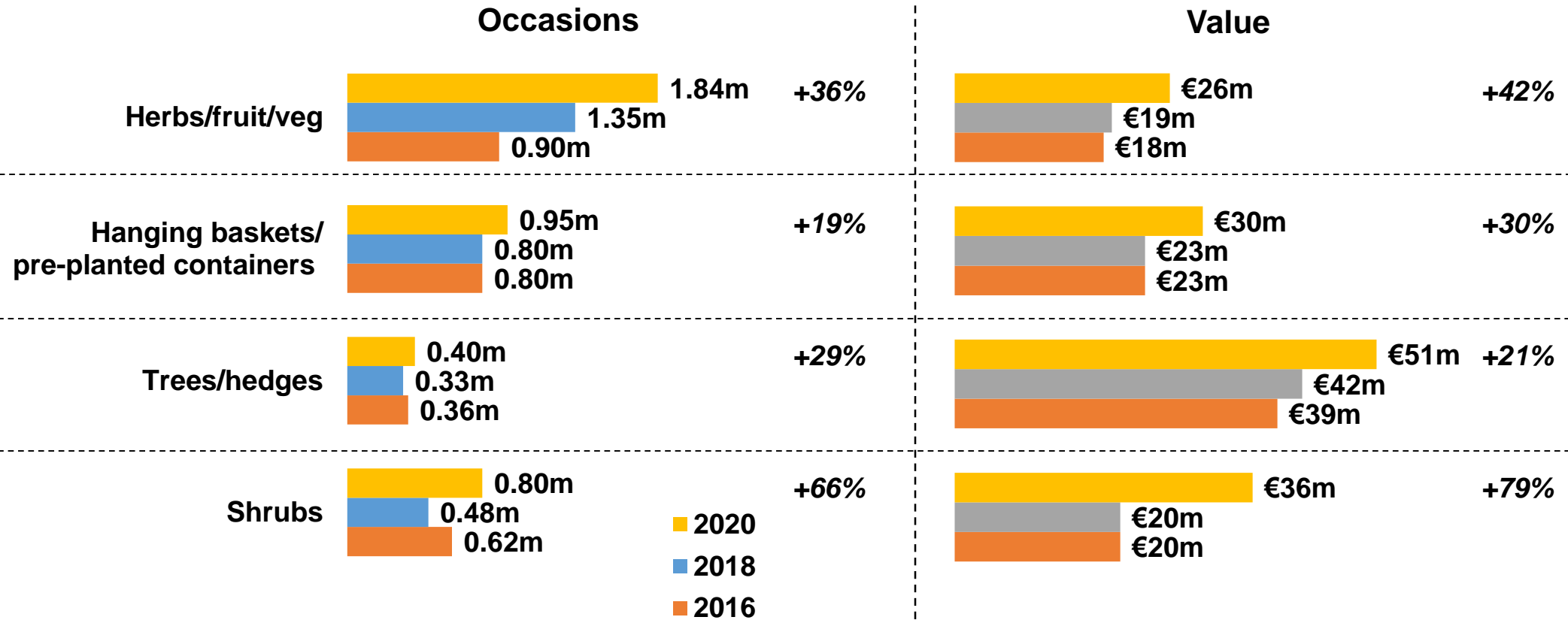
# Outdoor & Flowering Plants – Summary



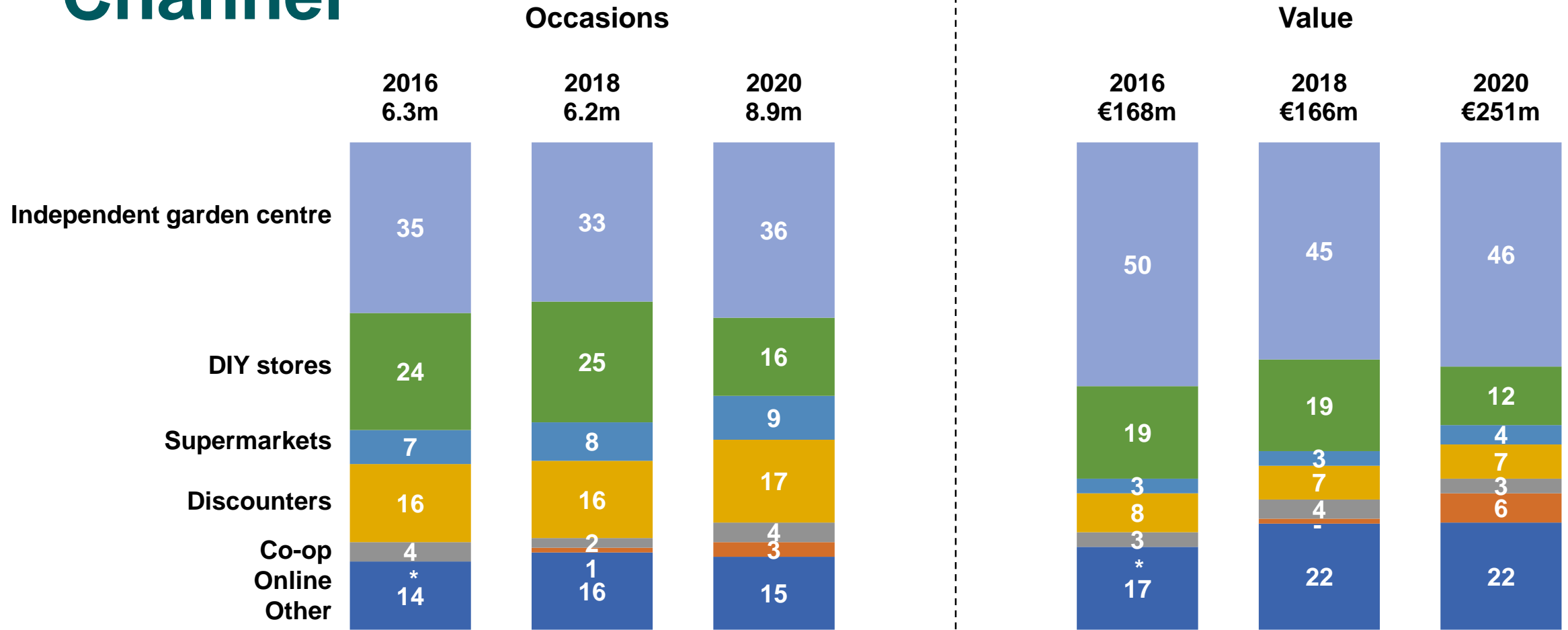
# Outdoor & Flowering Plants: Products Breakdown



# Outdoor & Flowering Plants: Products Breakdown

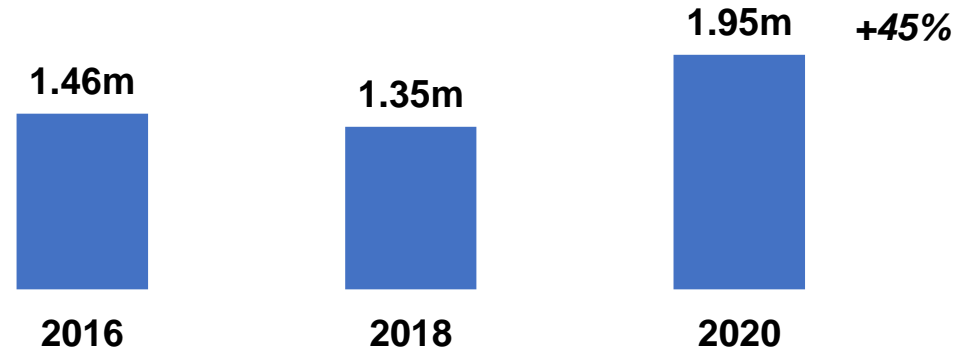


# Outdoor & Flowering Plants X Share of Channel

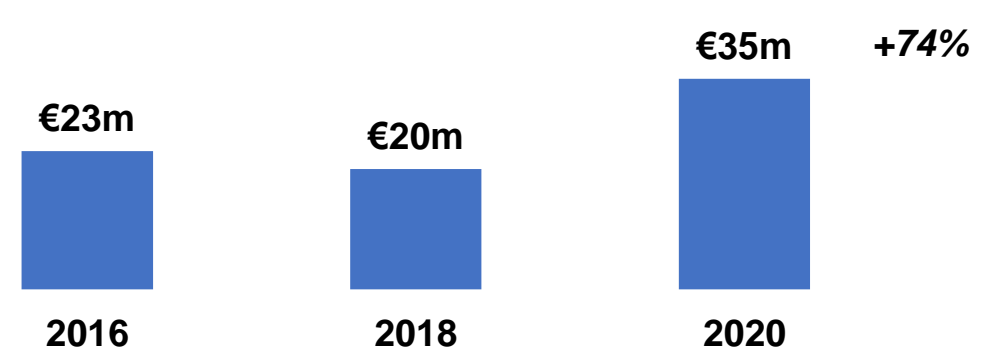


# Outdoor & Flowering Plants X Product - Bulbs/Flower Seeds For Planting

## Occasions



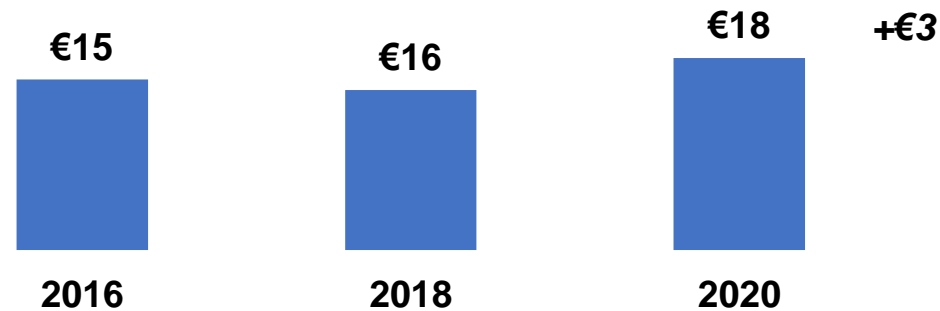
## Value



Per capita



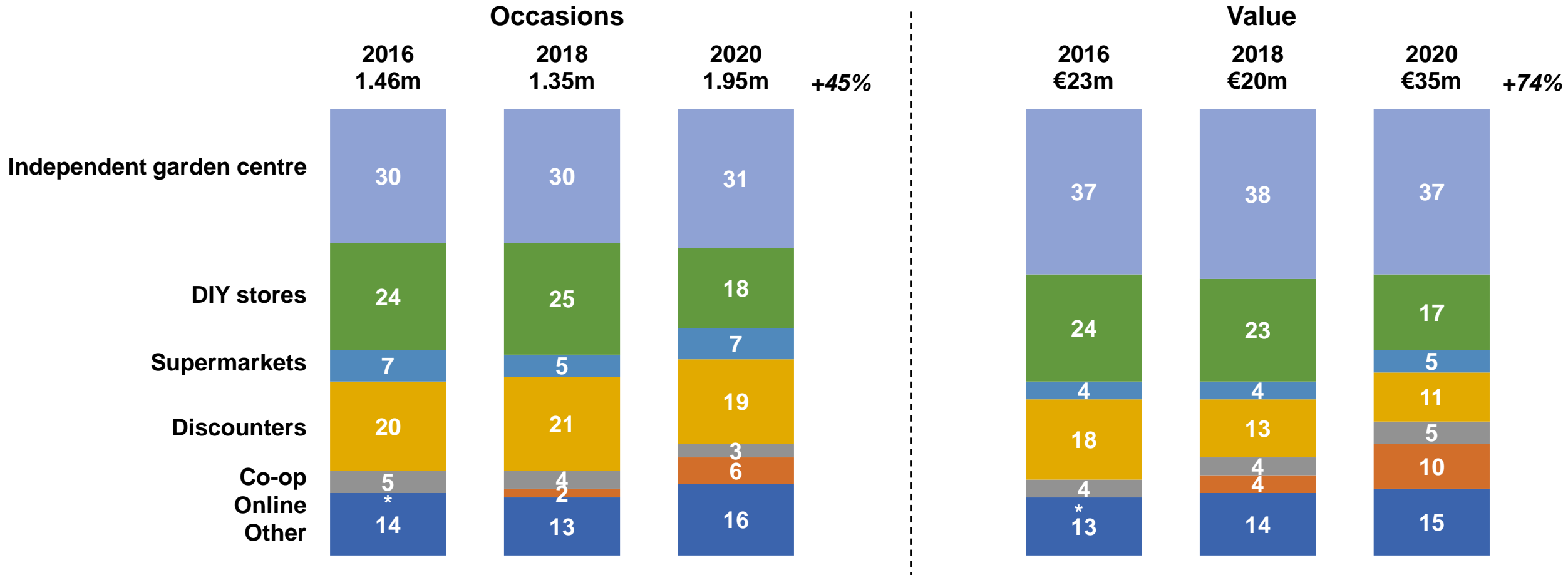
## Spend per purchase occasion



## Key Demographics

- Somewhat older profile.
- 41% of spend is by those aged 35 - 55.
- 10% of spend on line, though garden centres still account for the largest share of spend (37%).

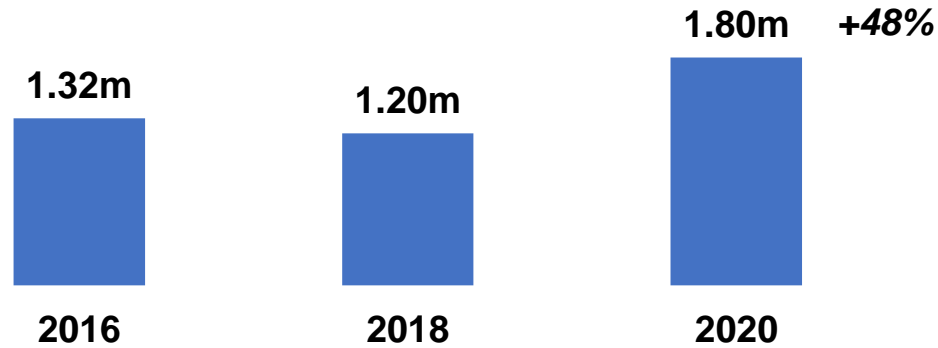
# Outdoor & Flowering Plants X Share of Channel - Bulbs/Flower Seeds For Planting



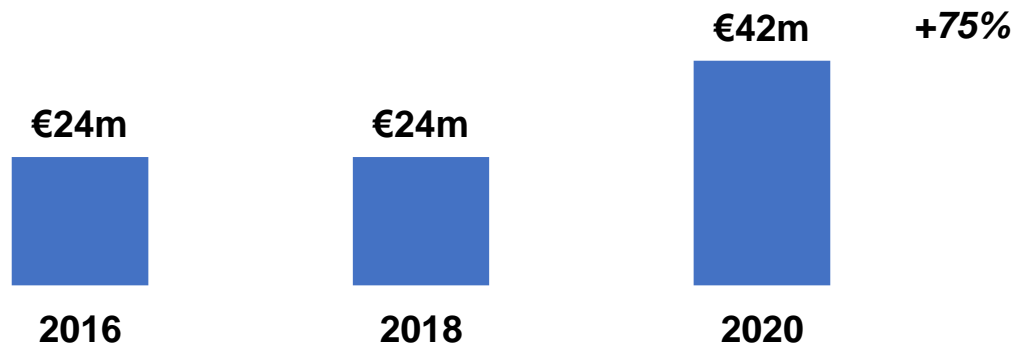
# Outdoor & Flowering Plants X Product

## - Bedding Plants

### Occasions



### Value

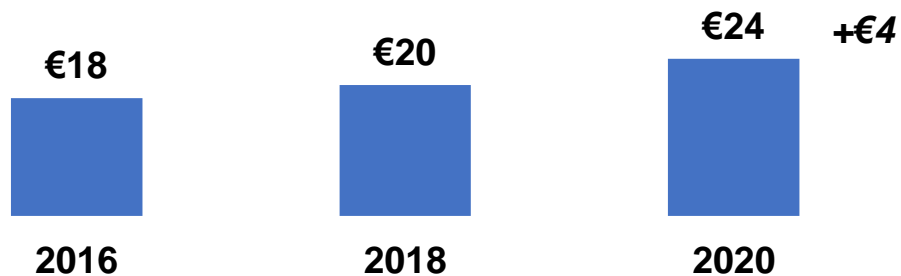


Per capita

.36 (2016), .32 (2018), .45 (2020)

€6.60 (2016), €6.25 (2018), €10.64 (2020)

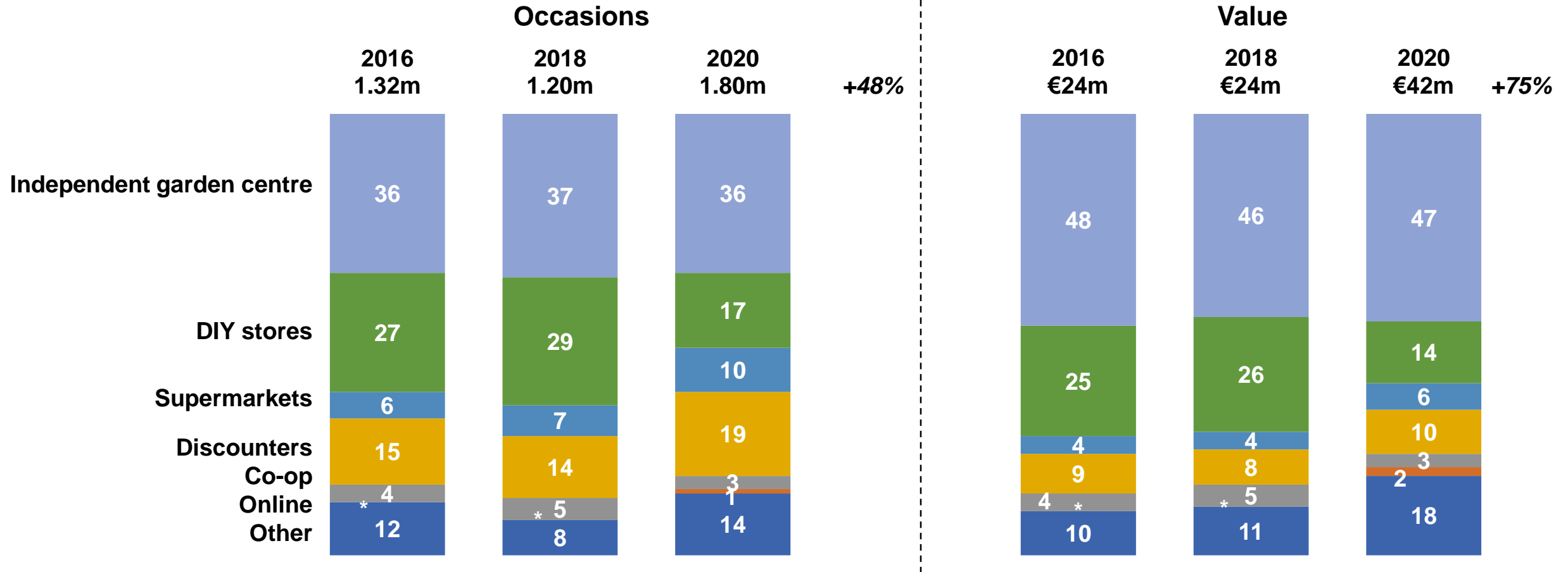
### Spend per purchase occasion



### Key Demographics

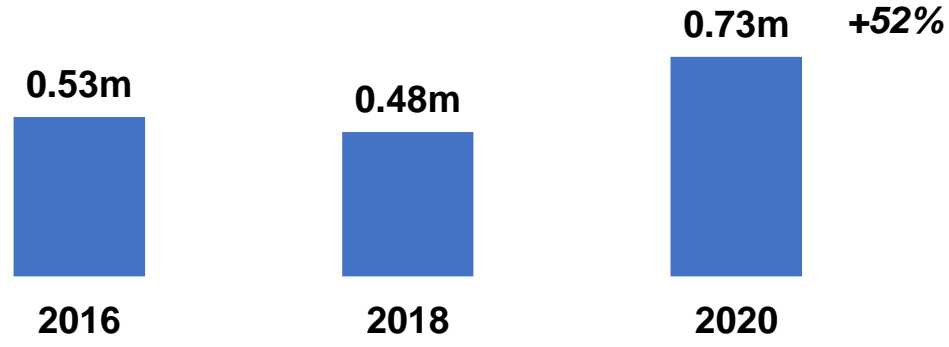
- Spend on bedding plants equally split between genders.
- 45% of spend is by those aged 55 or over.
- Garden centres account for the largest share of purchasing occasions and spend.
- DIY stores' (14%) share of spend is now lower than grocery (16%).

# Outdoor & Flowering Plants X Share of Channel - Bedding Plants

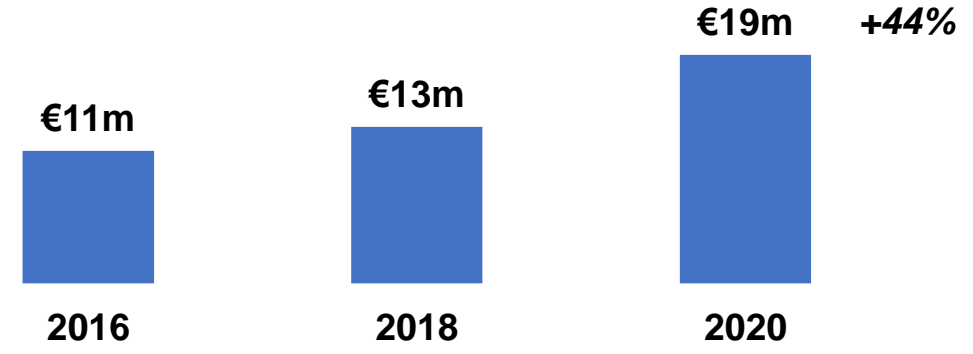


# Outdoor & Flowering Plants X Product - Herbaceous Border Plants

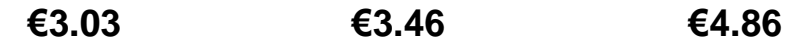
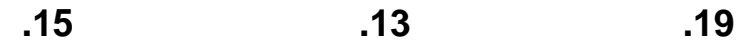
## Occasions



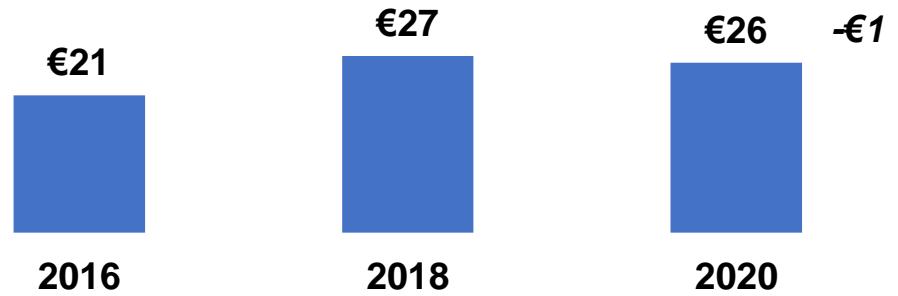
## Value



Per capita



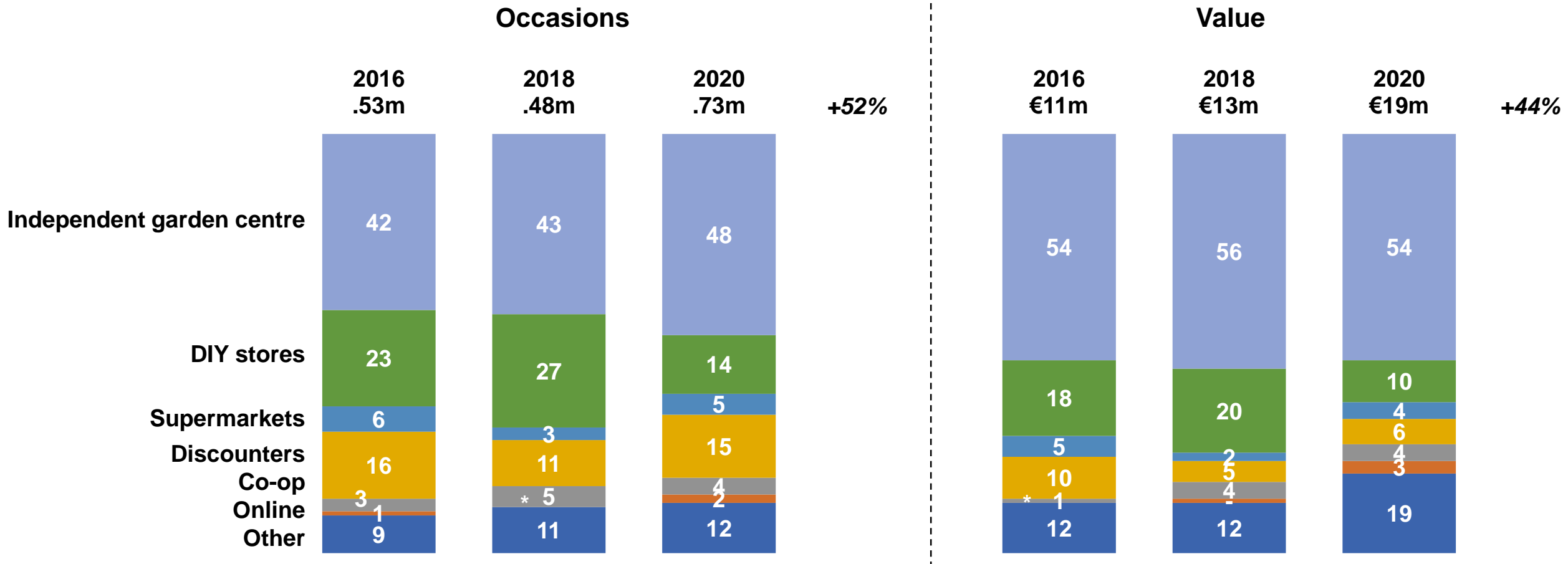
## Spend per purchase occasion



## Key Demographics

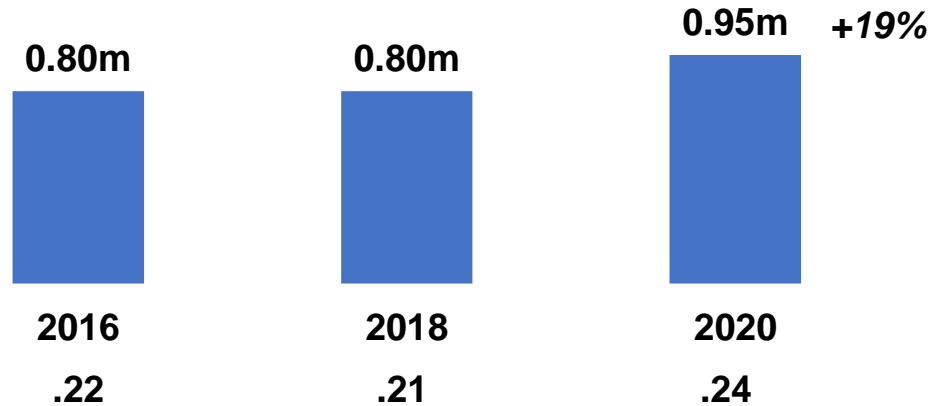
- 6 in 10 purchases are by women, though spend exhibits slight male bias.
- 35 -55 year olds account for around 4 in 10 purchasing occasions and spend.
- More than half of all spend is through Independent Garden Centres. DIY share has halved since 2018.

# Outdoor & Flowering Plants X Share of Channel - Herbaceous Border Plants

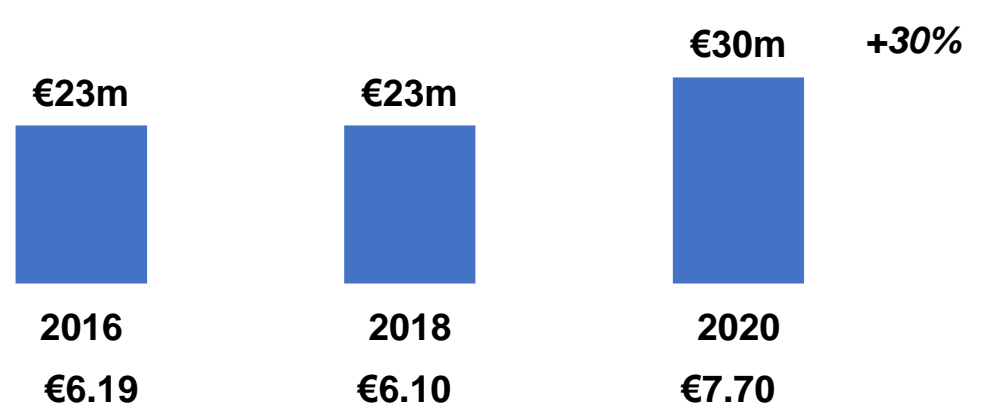


# Outdoor & Flowering Plants X Product - Hanging Baskets & Pre-planted Containers

## Occasions



## Value



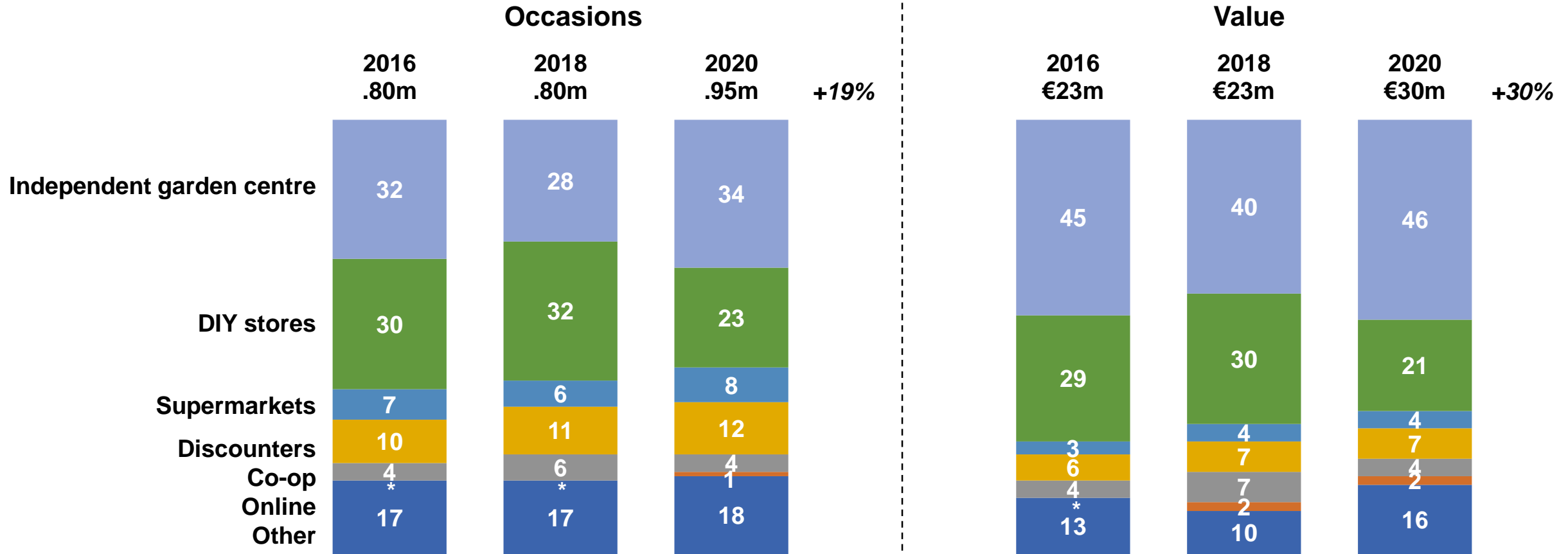
## Spend per purchase occasion



## Key Demographics

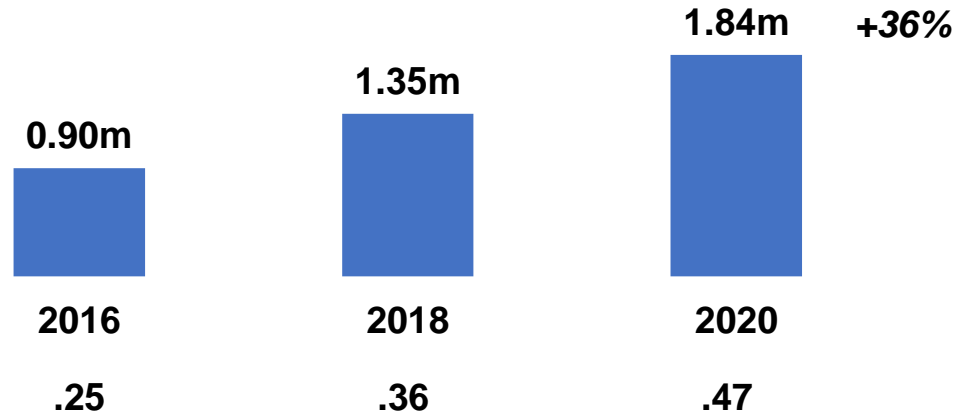
- The appeal of hanging baskets and pre-planted containers is broadly spread demographically.
- A quarter of all spend is by those aged under 34. Profile still exhibits an older bias, though less so than for other products.
- Garden centres and DIY stores are the key outlets for purchasing these products, though DIY share has contracted since 2018.
- 46% of spend is channelled through Independent Garden Centres.

# Outdoor & Flowering Plants X Share of Channel - Hanging Baskets & Pre-planted Containers

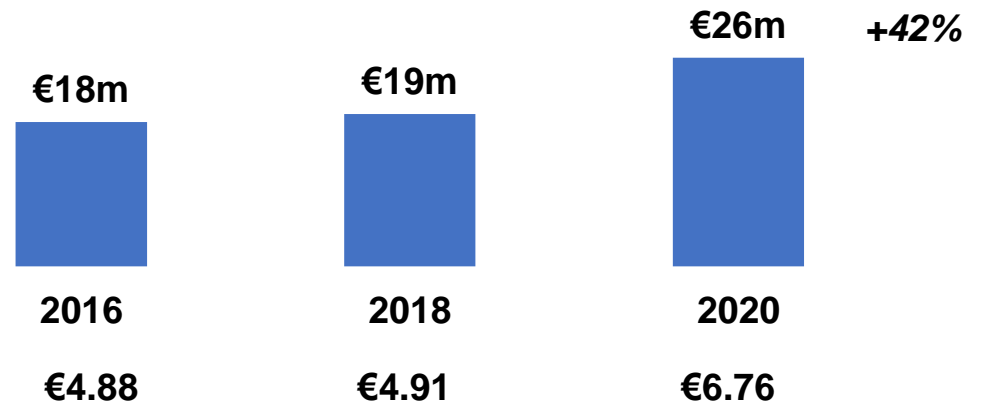


# Outdoor & Flowering Plants X Product - Herbs, Fruit & Vegetables For Planting

## Occasions



## Value



Per capita

.25      .36      .47

€4.88      €4.91      €6.76

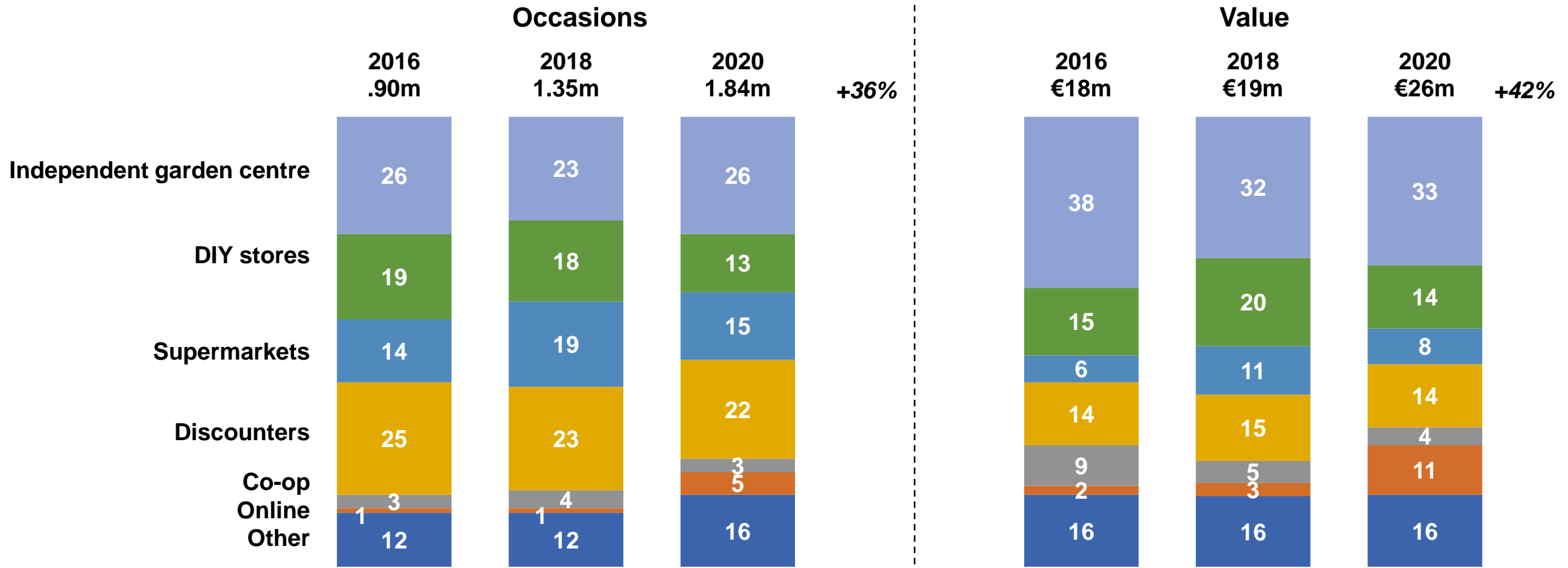
## Spend per purchase occasion



## Key Demographics

- Herbs fruit and vegetables for growing yourself are broadly spread demographically.
- Purchasing is broadly spread across the main channels, though a third of spend is through Independent Garden Centres.

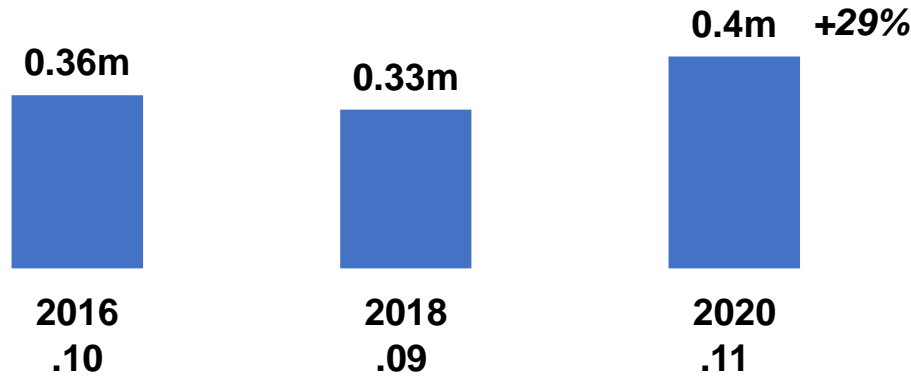
# Outdoor & Flowering Plants X Share of Channel - Herbs, Fruit & Vegetables For Planting



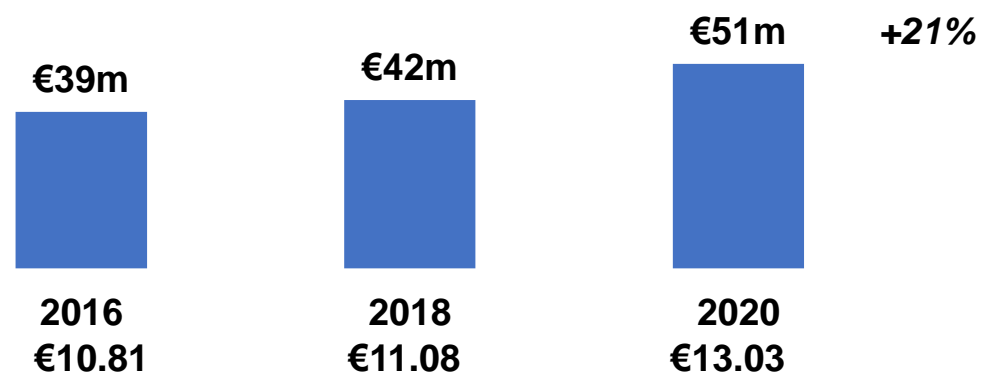
# Outdoor & Flowering Plants X Product

## - Trees/Hedges

### Occasions



### Value



Per capita

2016  
.10

2018  
.09

2020  
.11

2016  
€10.81

2018  
€11.08

2020  
€13.03

### Spend per purchase occasion

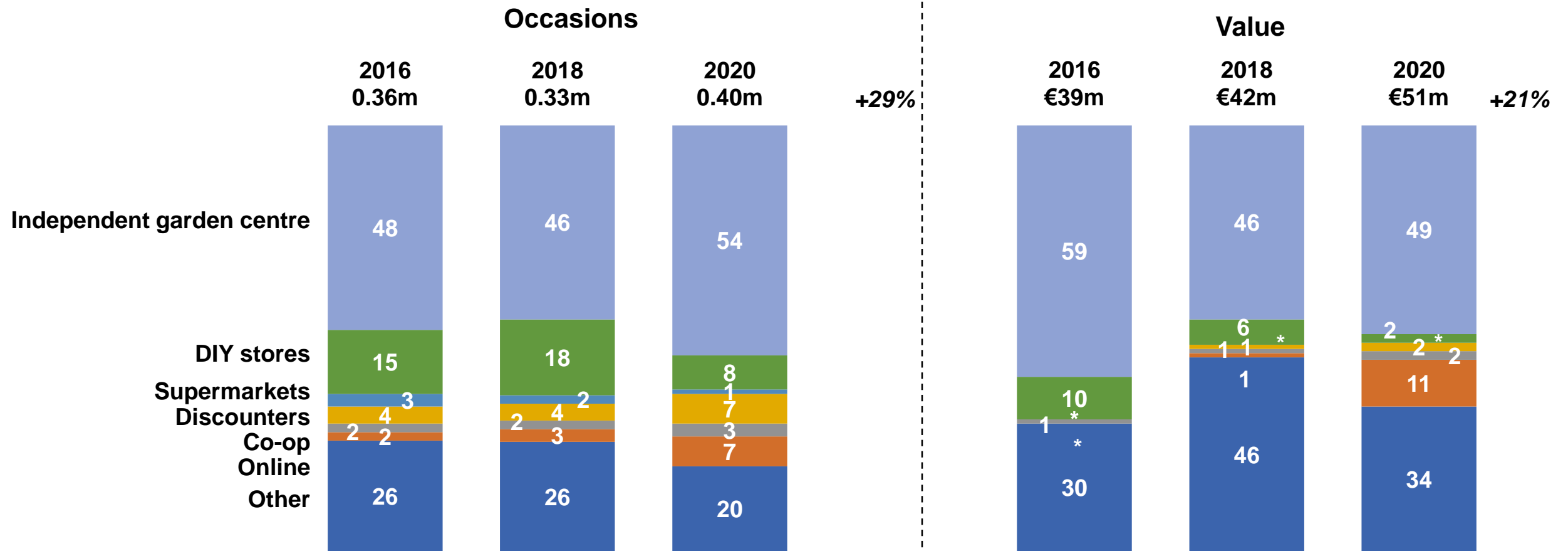


### Key Demographics

- Trees and hedges are more likely to be bought by men.
- Half of all spend is among 35 – 55 year olds, while U35s account for higher proportion of spend relative to most other plants.
- Independent Garden Centres are the primary channel for Trees/Hedges. 11% of spend was on line this year.

# Outdoor & Flowering Plants X Channel

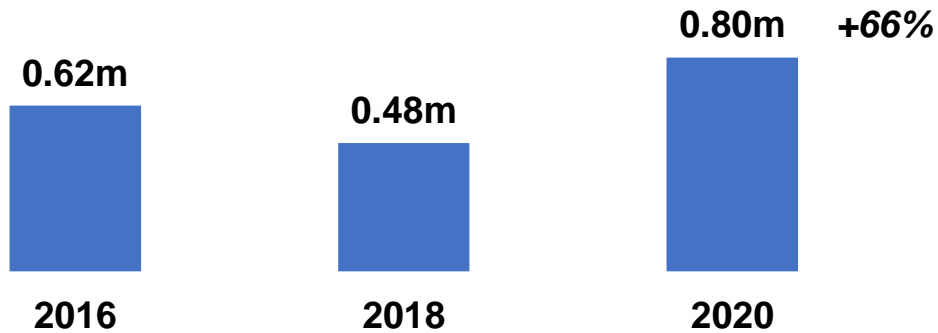
## - Trees/Hedges



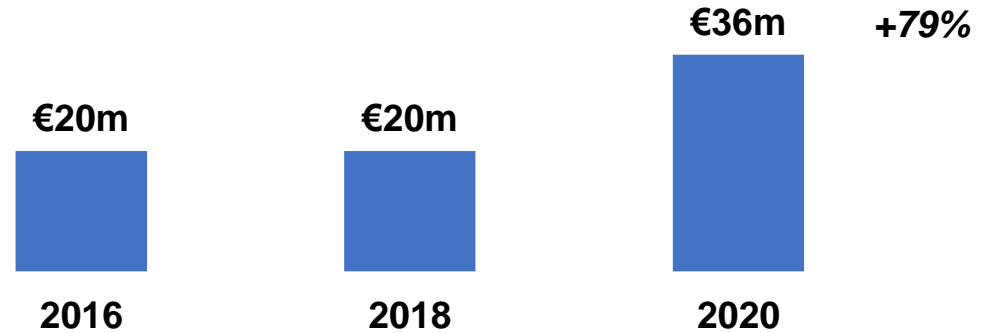
# Outdoor & Flowering Plants X Product

## - Shrubs

### Occasions



### Value



Per capita

.17

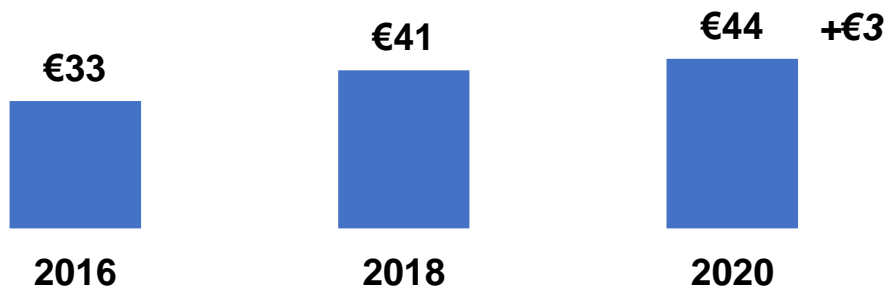
.13

€5.55

€5.25

€9.12

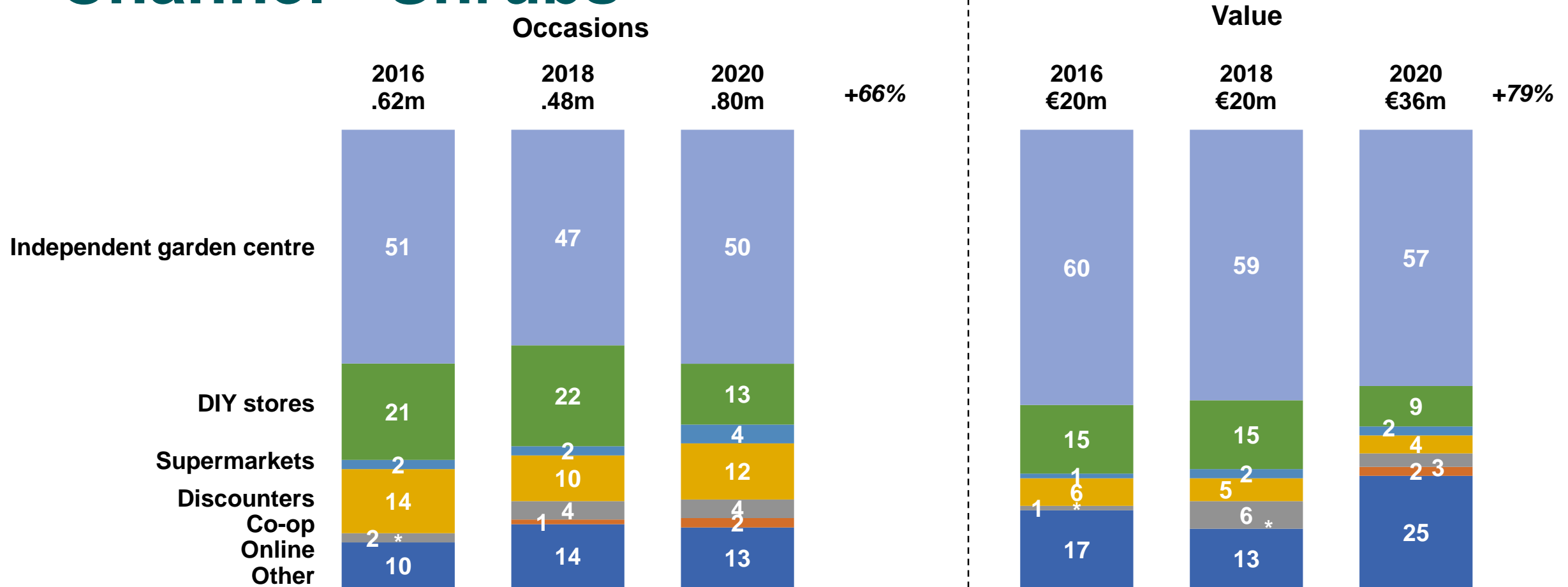
### Spend per purchase occasion



### Key Demographics

- Like trees and hedges, the profile of spend on shrubs is more male.
- However, spend on shrubs has an older bias – half of all purchase occasions are by those aged 55 or over.
- The majority of spend on shrubs is through independent Garden Centres.

# Outdoor & Flowering Plants X Share of Channel - Shrubs



# Indoor Potted Plants

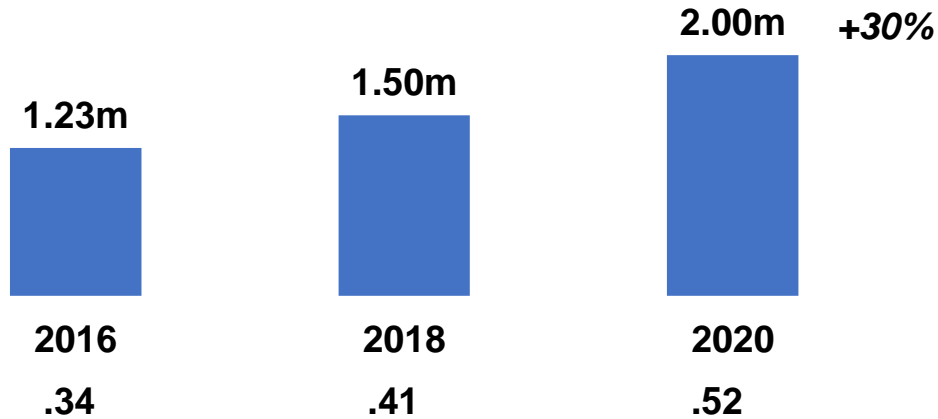
# Indoor Potted Plants

Definition includes:

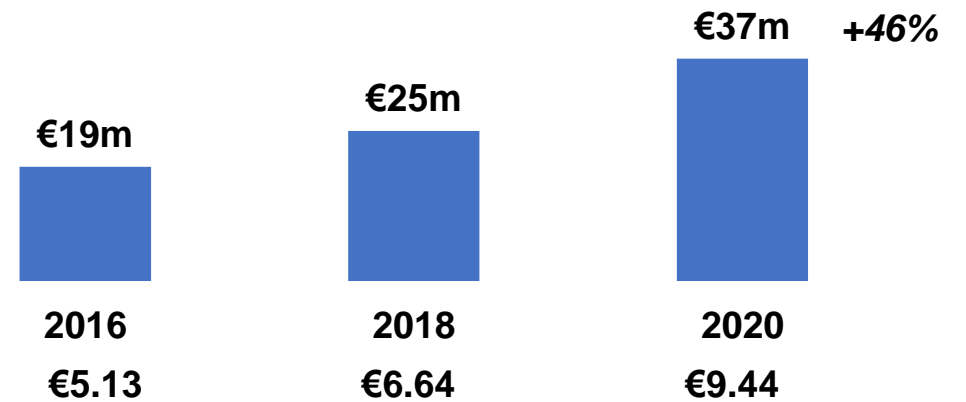
- Indoor potted plants (e.g. orchids, geraniums, spider plants, fig plants, cordyline)

# Indoor Potted Plants – Summary

## Occasions

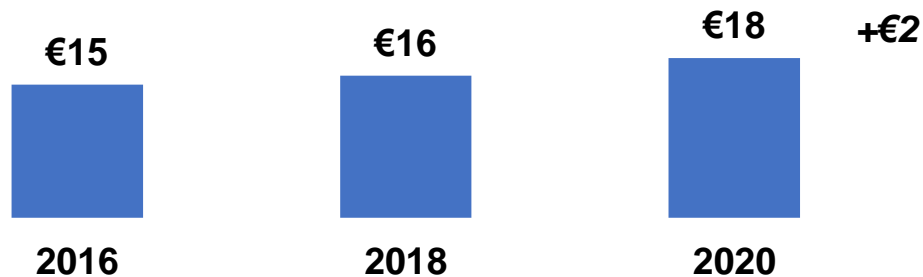


## Value



Per capita

## Spend per purchase occasion

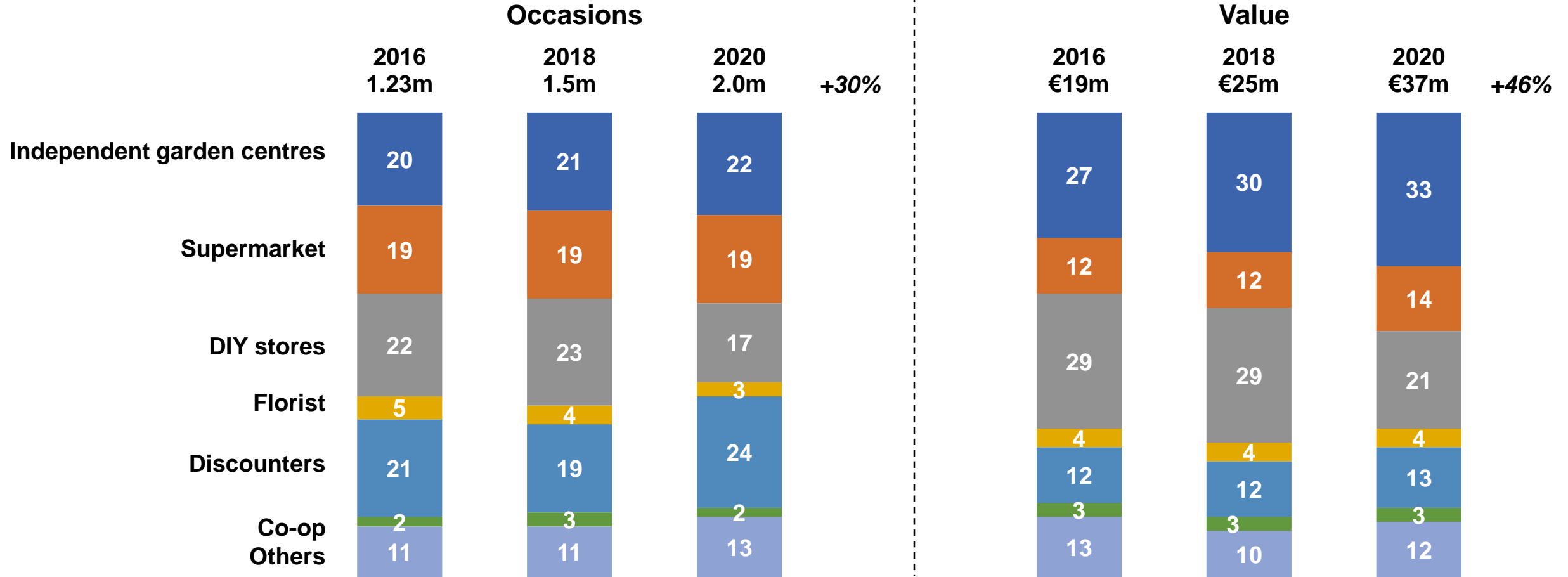


## Key Demographics

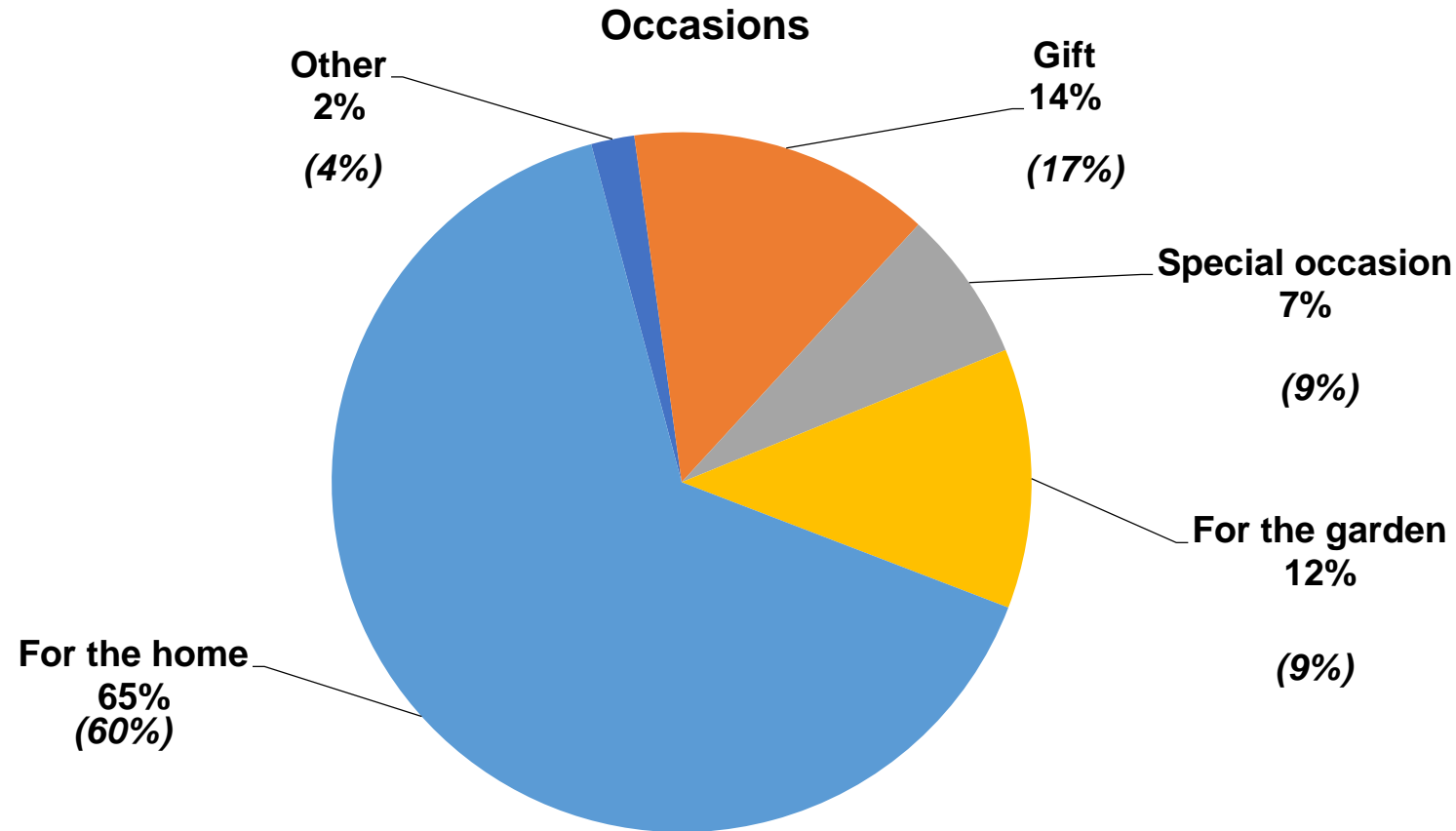
- 32% of spend on indoor potted plants is made by U35s; profile by age is now in line with the population.
- Discounters and supermarkets account for 4 in 10 purchases, up 5 points from 2018. Independent Garden Centres increased market share in 2020, while DIY share declined.
- Purchasing indoor plants as gifts down slightly compared with 2018. Most purchases are for the home.

# Market Share X Channel X Sector – Trend

## Indoor Potted Plants



# Reasons For Purchasing Indoor Potted Plants - Occasions



# Fresh Cut Flowers

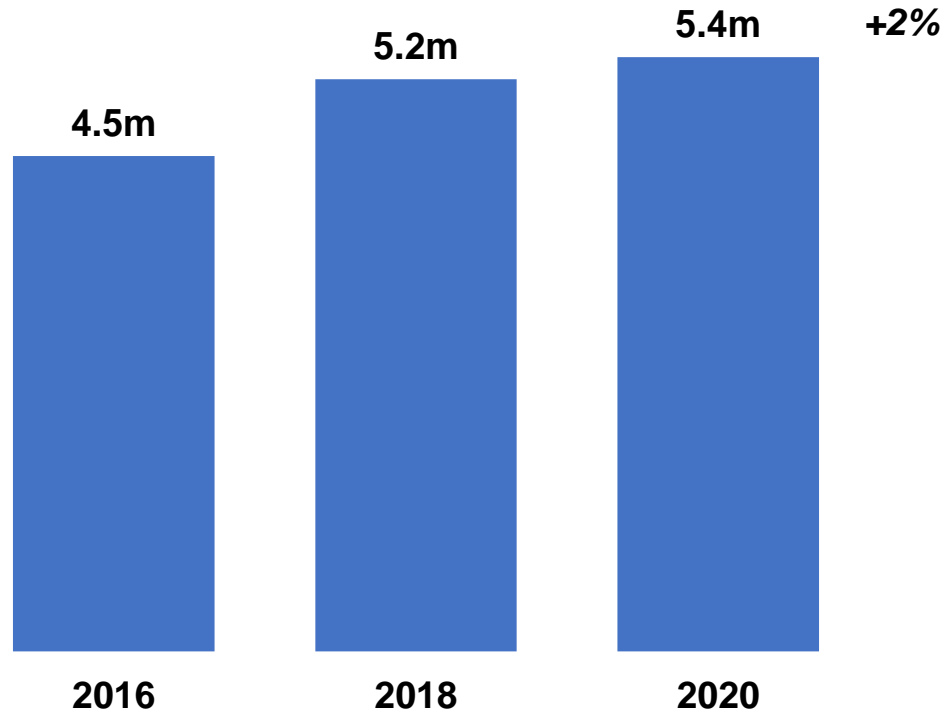
# Fresh Cut Flowers Category

Definition includes:

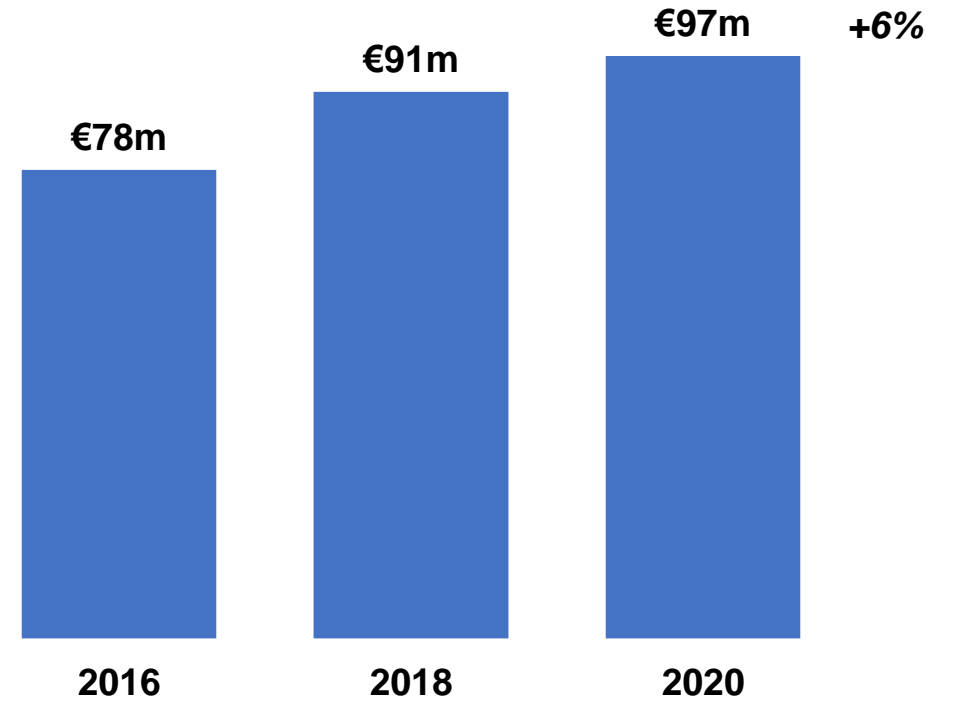
- Fresh cut flowers
- Wreaths
- Foliage

# Fresh Cut Flowers, Foliage & Wreaths – Summary

Occasions

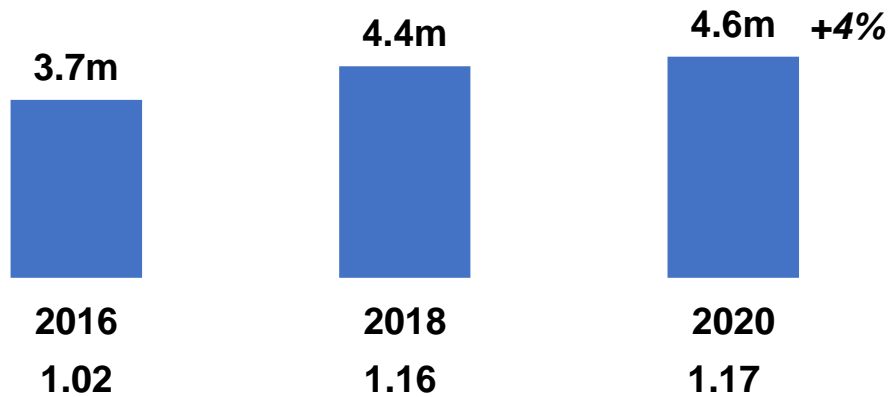


Value

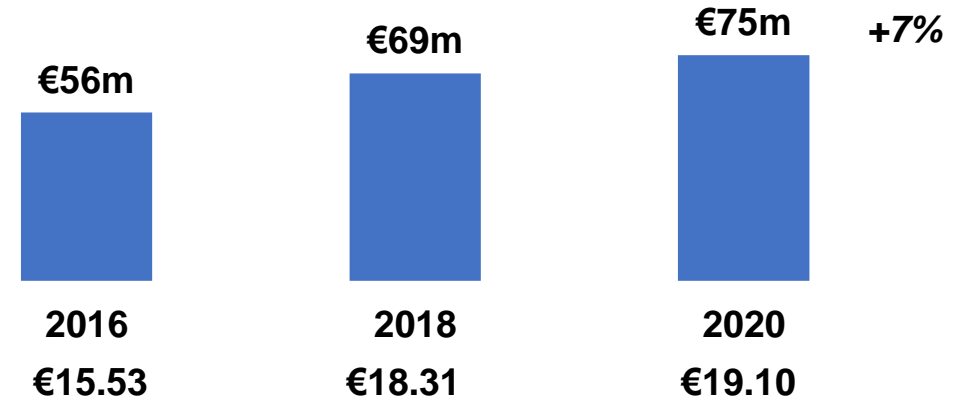


# Fresh Cut Flowers Market\*

## Occasions

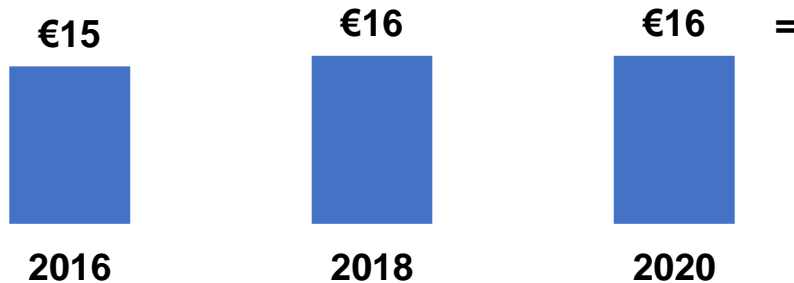


## Value



Per capita

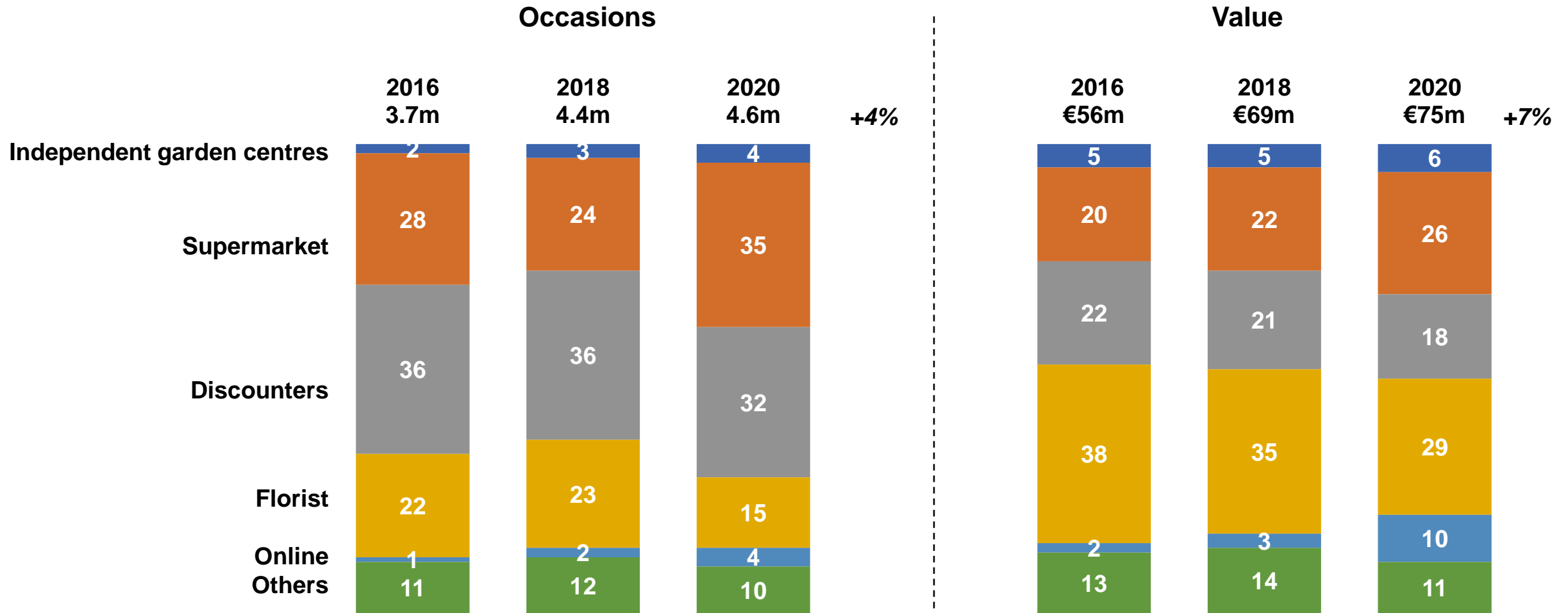
## Spend per purchase occasion



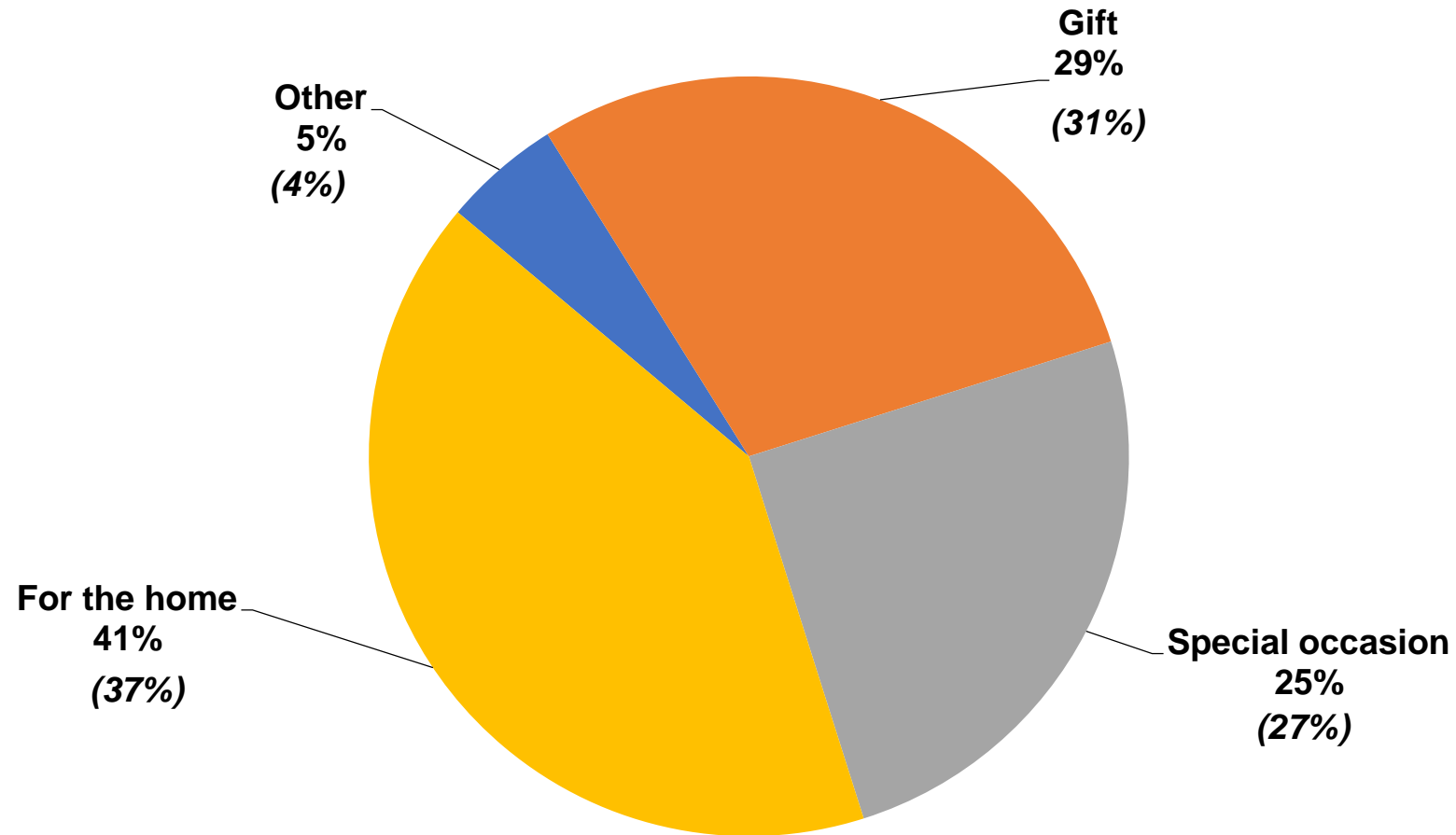
## Key Demographics

- Volume purchasing of cut flowers has a female bias, but men account for nearly half of all spend.
- Cut flowers volume and value exhibits a middle class bias. The market is spread relatively equally across age groups.
- Two thirds of purchases are through discounters and supermarkets. Florists' share suffered, though one tenth of spend was on line – the majority of which were florists.

# Fresh Cut Flowers\* X Channel



# Reasons For Purchasing Fresh Cut Flowers - Occasions



*(2018 %s in brackets)*

# Garden Products

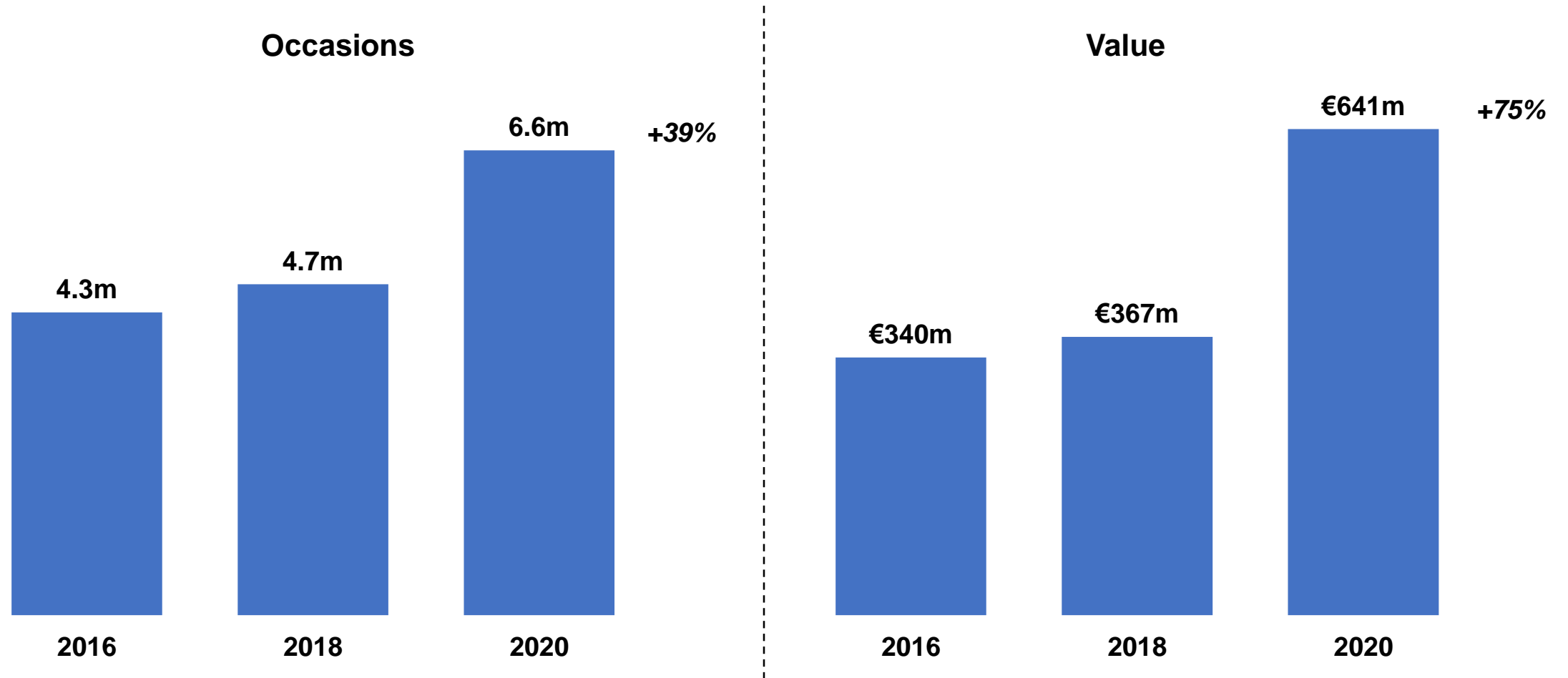


# Garden Products Category

Definition includes:

- 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).

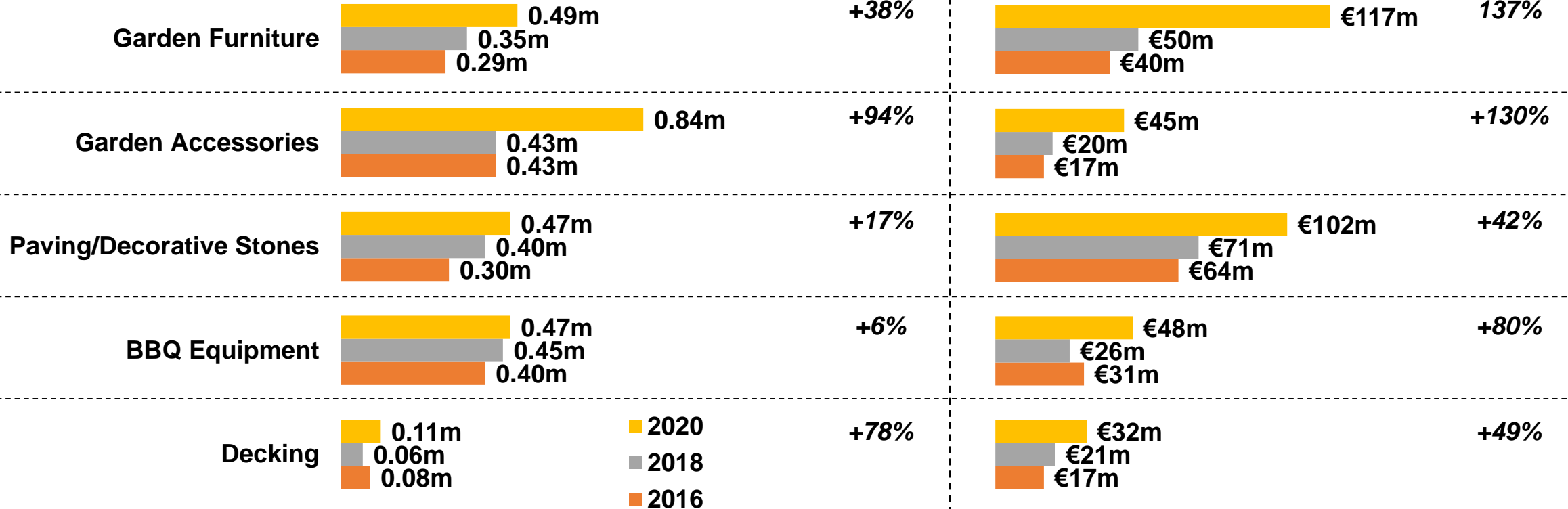
# Garden Products – Summary



# Garden Products: Ornamental

## Occasions

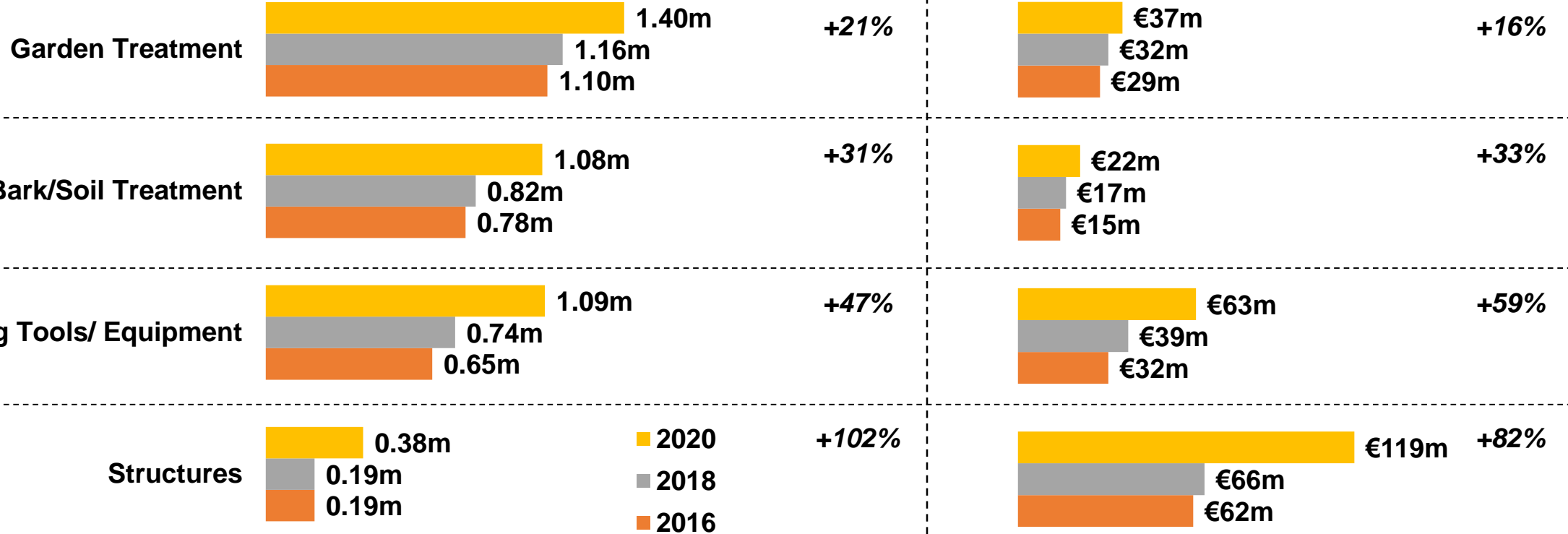
## Value



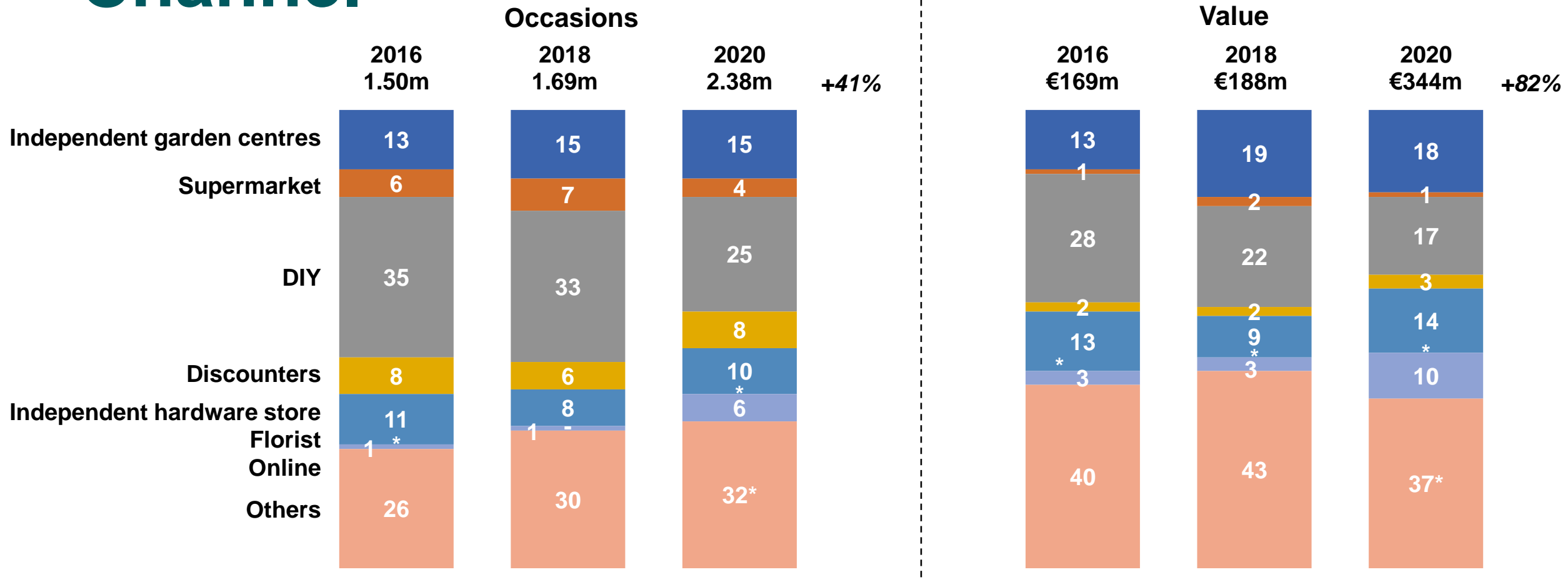
# Garden Products: Functional

## Occasions

## Value



# Ornamental Garden Products X Share of Channel



# Functional Garden Products X Channel

## Occasions

## Value

2016  
2.53m

2018  
2.72m

2020  
3.56m

+61%

2016  
€76m

2018  
€88m

2020  
€122m

+39%

Independent garden centres

24

23

24

Supermarket

4

3

4

DIY

32

33

27

Discounters

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12

Independent hardware store

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10

11

Florist

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1

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Co-op

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9

9

Online

1

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3

Others

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8

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26

21

24

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2

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32

28

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7

6

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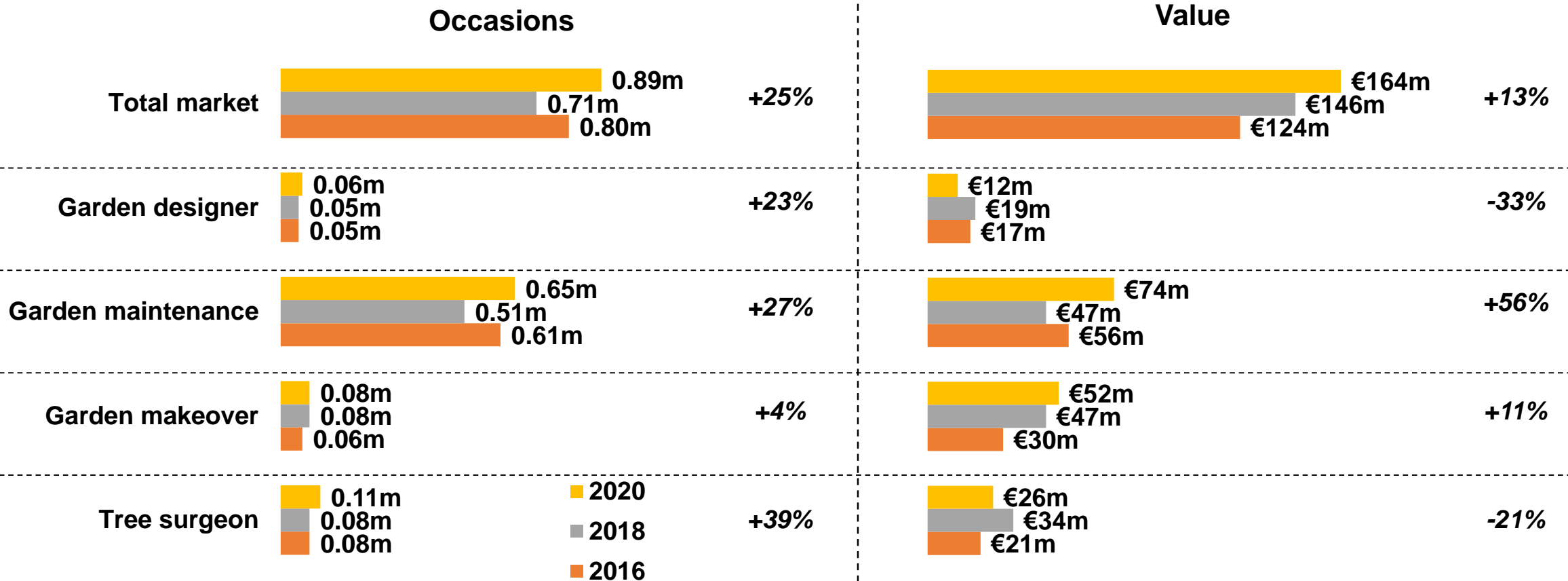
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# Landscaping Services

# Landscaping Services – Summary



**Amenity Sector  
Full Year 2020  
Management Report  
Thank you!**

February 2021

