

Smaller Plants for Smaller Gardens? The Future of the Garden Plant Industry in the U.K. ©

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The retail value of the garden plant market in the U.K. has remained around £2 billion for the last decade. During this time several trends have been observed, including an increase in on-line sales and a higher proportion of edible plant sales. In the meantime the average size of private domestic gardens is decreasing and an increased proportion of the available area is committed to patio and hard landscaping. These changes have been reflected in the development of new garden plant products that offer a compact habit, low maintenance, and an enhanced functionality (such as edible plants with decorative uses). The future presents new challenges to product development including utilisation of vertical spaces (walls) and a reduction in irrigation requirement.

RETAIL SALES OF GARDEN PLANTS IN THE UNITED KINGDOM

The United Kingdom (U.K.) enjoys a mild maritime climate: ideally suited to the outdoor cultivation of temperate plants and a selection of hardier sub-tropical species. The combination of a favourable climate and a long established history of ornamental gardening is the basis of a production industry that supplies a home market worth in excess of £2 billion (Fig. 1.)

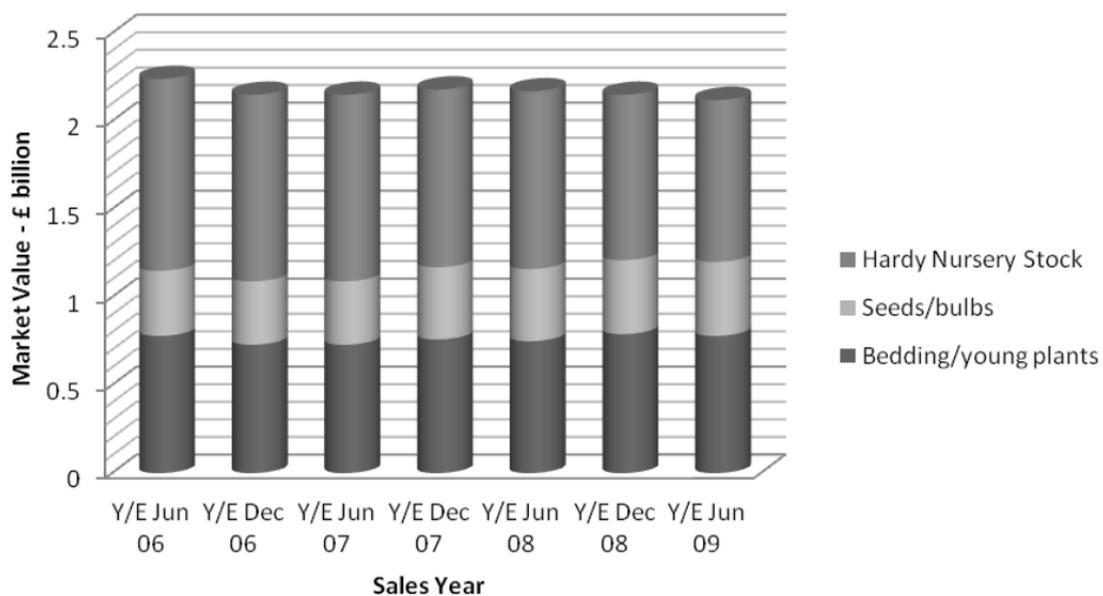


Fig. 1. Market share by product group. Source: Horticultural Trades Association/GfK 2010.

Over the last decade the market has remained relatively stable (although 2012 was severely affected by high levels of spring and summer rainfall). The main sales period is March to May. The majority of retail sales are through traditional garden centres (57%) and a further 23% are through other retail stores (Fig. 2).

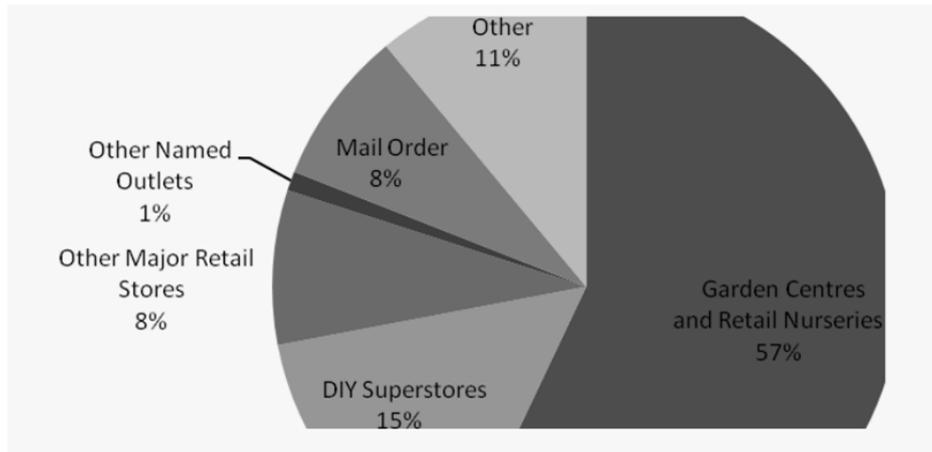


Fig. 2. Retail sales of hardy garden plants in the U.K. Source: Horticultural Trades Association/Kantar Media 2010.

Although there has been some recent growth in mail order and internet sales (especially for bulbs and young plants), it seems that the consumer retains a preference for the retail experience of the garden centre. Within garden centres there has been a shift from offering a comprehensive (“A to Z”) range of plant species to a more select ranges supported by promotional material such as backing boards and detailed colour labels (Fig. 3).



Fig. 3. A promotion of oriental poppies (*Papaver orientale*) at a U.K. garden centre (photo: Neil Robertson).

MARKET TRENDS

The growth in promotional sales has caused growers to look very carefully at trends in gardening habits – in order to provide the offers that will be attractive to the customer and competitive in the marketplace.

A good indication of contemporary trends in gardening can be gained by viewing aerial photographs of recent housing developments using internet applications such as Google Earth. Aerial images reveal that the size of private gardens is decreasing in the latest housing developments (compared to older developments in the same area with similar property values), they are typically bounded by fences or walls (generally over 2 m high) and feature a high proportion of hard landscaping. From this it is reasonable to conclude there is a demand for plants with the following attributes:

- 1) Tolerance of the adverse microclimates associated with small enclosed gardens (such as extreme shade or brightness, wetness, or dryness).
- 2) Ability to cover vertical surfaces (such as walls and fences).
- 3) Low maintenance products that need little additional attention post-purchase. The prevalence of hard landscaping is indicative of a lack of commitment to time spent on gardening activity. Products that meet these criteria include pre-planted decorative containers.
- 4) Plants that can combine a number of functions within the small amount of space available.

The final point reflects a trend found in other consumer goods – such as mobile phones; which now also fulfil the role of pocket computer, radio, camera, GPS device, etc.!

MULTIFUNCTIONAL PLANTS

Emphasising a range of functions for a new plant product is a powerful promotional tool. Attributes that might be considered include:

- Edibility.
- Fragrance.
- Use in both home and garden (such as flowers suitable for cutting).
- Attractiveness to wildlife.
- Perimeter security (such as plants with thorns).
- Engages children (such as insectivorous plants).

These attributes can easily be emphasised on point of sale materials and in the publicity associated with product launches and promotions.

In this context it is easy to understand why herbs, such as *Salvia* spp. and *Lavandula* spp., have become increasingly popular over the last decade and why attractiveness to bees has become a major theme in plant-marketing employed by the Royal Horticultural Society and several commercial nurseries.

CONCLUSION

In the competition for space in a small garden; the consumer will judge in favour of those plants that offer the most perceived benefits.

Simple aesthetic attractiveness is no longer sufficient to sell most new garden plant products; marketing materials produced by nurseries should emphasise all the other supplementary attributes associated with their products.

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Literature Cited

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