Garden Products & Equipment Market
Research & Analysis UK 2010

REPORT SAMPLE

Domestic Garden Products Market Size & Review 2004-2010; SWOT & PEST Analysis, Product Mix 2004-2014; Channel Mix 2004-2014; Manufacturers Profiles, Garden Centres Profiles & Key Financials; Market Forecasts to 2014

March 2010

Research & Analysis Report Contents

Market Report Tables & Charts

Published in xxxx by

This report reflects MTW Research's independent view of the market which may differ from other third party views. Whilst we try to ensure that our reports are an accurate depiction of their respective markets, it must be emphasised that the figures and comment contained therein are estimates based on a mix of primary and secondary research, and should therefore be treated as such.

Companies Included

Whilst MTW endeavour to ensure that the majority of the major companies active in the market with which this report is concerned are included, it should be noted that the list of companies included in this report is not exhaustive and the inclusion or otherwise of a company in this report does not necessarily indicate, nor should be interpreted as, a company's relevance or otherwise in a particular market. Whilst we endeavour to attain high levels of accuracy, it should be borne in mind that the rankings and other information provided within this report contain an element of estimation, should be regarded as such and treated with a degree of caution.

Estimates Provided

In order to enable benchmarking, competitor analysis and facilitate further market research, MTW have provided estimates for turnover, profit before tax and number of employees for small, medium sized and other companies who are not obliged to submit this information to Companies House. As such, in the interests of clarity, all data relating to turnover, profit and number of employees provided in this report should be regarded as independent estimates by MTW. Whilst we endeavour to attain high levels of accuracy with these estimates, they may not reflect the actual figures of a company and should therefore be treated with caution.

1. Introduction to *Research & Analysis* Reports

1.1 Key Features & Benefits of this Research & Analysis Report

MTW's *"Research & Analysis"* market reports provide an independent, comprehensive review of recent, current and future market size and trends in an easy to reference format. Each report provides vital market intelligence in terms of size, product mix, distribution channel mix, SWOT, key trends and influences, supply and distribution channel trends. In addition, rankings by turnover, profit and other key financials for the market leaders are provided as well as a x page profile for each key player in the market. Contact, telemarketing & mailing details are also provided for each company to enable the reader to quickly develop sales leads.

Based on company sales returns which provide higher confidence levels and researched by market research professionals with experience in the industry, MTW's *Research and Analysis* reports are used as a foundation for coherent strategic decision making based on sound market intelligence and for developing effective marketing plans. MTW reports can also used as an operational sales and marketing tool by identifying market leaders, enabling the reader to quickly grow sales to new clients and focus marketing budgets.

This report includes:-

- **Market Size, PEST, SWOT & Trends – Historical, Current & Future**

Based on sales data from a representative proportion of the industry, this report provides market size by value over a ten-year period. As they are based on quantitative data as well as qualitative input from the industry, our reports are more accurate than other qualitative based reports and offer better value for money. By combining the best of both quantitative and qualitative input, we offer our clients greater confidence in our market forecasts as well as discussing key market trends and influences from a qualitative perspective.

- **Product Mix – Current & Future**

This report identifies the key product sectors in the market and provides historical, current and forecast market share estimates for each, alongside qualitative discussion on key trends for each segment of the industry. With input for this report being both qualitative and quantitative we are able to offer an effective insight into the core components of the market, as well as forecasting future market shares.

- **Distribution Channel Mix – Current & Future**

The report identifies the key distribution channels that drive demand for this market and provide a current, historical & future market share estimate for each. This enables the reader to identify the key driving forces behind current market demand and adapt business tactics accordingly. With forecasts of market share by key channels also provided, the reader is able to undertake strategic decisions with greater confidence as well as basing marketing strategies on solid market intelligence.

- **Market Leaders Ranking**

This report identifies the key players in the market and ranks them by a number of criteria, including turnover and profitability. This enables the reader to identify the most relevant potential key customers in a market, understand their current position in the market and quickly identify new targets. Also, MTW provide a turnover estimate for every company included in the report, enabling the reader to develop market share estimates.

- **Company Profiles & Sales Leads**

This report includes a x page profile for each company including full contact details for developing fast sales leads; x years of the most recent key financial indicators; and MTW's *'at a glance'* chart, enabling the reader to quickly gauge the current financial health of a company.

- **Relevant Companies, Saving You Time**

MTW Research have been researching and writing market reports in these sectors since xxxx and as such we are able to develop a company listing which is more relevant to the market, rather than automatically selecting companies to be included by industry code. Our reports represent excellent value for money and don't bombard you with irrelevant financial data; they are designed to enable you to engage in fast and effective market analysis. We focus on providing what's important in an easy to reference and use format.

2. UK GARDEN PRODUCTS MARKET

2.1 EXECUTIVE SUMMARY & MARKET OVERVIEW

The UK Garden Products Market comprises of a wide range of products suitable for a variety of applications within a domestic garden environment. Specifically, this report reviews the UK domestic garden products market between xxxx and xxxx with forecasts to xxxx for:-

- **Garden Tools & Equipment** – hand tools, power tools, lawnmowers
- **Garden Timber & Hard Landscaping** – decking, fencing, trellis, pergolas, garden paving, walling & aggregates
- **Water Features & Garden Decoration** – fountains, water features, ponds, pumps, hoses, irrigatoin, controls, garden lighting, pots, tubs, planters.
- **Garden Chemicals & Lawncare** – lawn care, weedkillers, fertilisers, compost, food, pest control.
- **Garden Furniture & Barbecues** – garden furniture, barbecues, outdoor cooking appliances, accessories & fuel.
- **Garden Sheds, Greenhouses & Buildings** – sheds, greenhouses, summerhouses, cabins, garden rooms.
- **Horticultural & Greenstock** – seeds, bulbs, perennial plants, roses, climbers, bedding plants, ferns & grasses, shrubs, house plants, fruit & veg trees / plants.

The combined sales of the above products are estimated to be worth some £x.xx billion at retail selling prices in xxxx, wit

REPORT SAMPLE

growth during xxxx following a market d
for the market overall in the near to me
influences are set to drive both volume
product sectors.

The market remains do ... ed pressure on margins for both ma ... ressure is emanating from the gro ... a dip in demand during mid-late ... d are likely to continue to grow, rising ... dium to longer term. By xxxx, ... nports will reach just over £x.xx bi ... garden products.

REPORT SAMPLE

The largest sector of the garden products market is barbecues and other cooking appliances designed fo

REPORT SAMPLE

applications. some £xxx million in xxxx, reflecti overall economic fragility.

The second largest sector of the market is comprised of a wide range of domestic , th xxxx. The third largest sector of the market is accounted for by the tools and garden equipment sector, currently estimated to be worth just under £xxx million.

Horticultural and garden care products are also significant in the garden products market, each accountin sectors have benefited from the tren nths and both outperformed the

The market is currently worth just unde es, whilst the garden timber and hard t around £x

Sales of garden water features & decoration are currently xx.x million in xxxx, w et is currently estimated to be worth around £xx ucts within the garden buildings sector in ifecycle, th set to return to moderate growth in xxxx, boosted by develop value sector of the garden et.

In terms distribution, the D ontinue to dominate the distribution of garden products in the UK, garden products throug multiples expected to reac billion in xxxx. The sector is accounted for by tres market, sales thro centres just under £x billio third largest sector is high street stores, food ret ount retailers, with this estimated to account for a he market in xxxx. Th order channel is currently hieve sales of around xxxx.

For the preceding xx months to January xxxx, our estimates suggest that more than xx% of garden centres experienced growth which could be described as 'rapid', with sales rising by more than xx% per year, with xx% of garden centres estimated to have experienced some sales growth over the last xx months. The South East represents a substantial share of the market in xxxx, in part reflecting the higher level of wage earnings coupled with its higher level of population. The East Midlands, West Midlands, South West and the North West are also a key geographical targets market with x-xx% each.

Growth rates of xxxx are set to ri x years, with above inflat recast to return t xxx onwards. By xxxx, the ma st to reach a value ail selling prices, reflecting growth of just under x% from the current market value.

2.2 GARDEN PRODUCTS MARKET SIZE & TRENDS 2004-2014

2.2.1 Garden Products Market Size 2004-2014 – Current Prices

The UK Garden Products market encompasses a wide range of products and is estimated to be worth just over £x.xx billion in xxxx as illustrated in the following chart:-

Figure 1: Garden Products Market – UK 2004 – 2014 By Value £m

REPORT SAMPLE

de Estimates

The UK garden … retailers
selling prices, r… her sectors of
the UK econom…

Between xxxx a… ance in a
number of key … s and power
tools, though al… eriod. By
mid xxxx, howe… nd this,
coupled with po… arket
contracting in v…

REPORT SAMPLE

Sales of garden … ith the poor
summer and ris… result of
growing unemp… also
exacerbated by… barbecues
and garden furn… rising quickly
over this period…

Despite a rapid … many sectors,
sales of garden … st with the
majority of othe… on of xx-
xx%. Further, … ers abated to
some extent in … e reduced.

Consumer spending on garden products did not exhibit the same level of decline as in many other home improvement sectors, with most products displaying a high level of resilience to the economic downturn. Trade sources indicate that there are a number of reasons for this resilience in xxxx, including:-

- **Im** sage etc.
- **'Gr** to
- **En** ers ng
- **'St** road, &
- **Val** at nels ey.
- **Pr** ulted a
- **'Pe** cate ring
- **VA** sus to the tage

REPORT SAMPLE

A number c ic set of circumst eated in xxxx. W n early xxxx. that the trend c urn to holidaying

As the econ turn to growth i becoming l which was pent u ne to some exter

These issue ns that value around x% t, this still transla rm

2.2.2 Garden Products Market Size 2004-2014 – Constant Prices

The following chart illustrates the performance of the market value with consumer price index inflation stripped out since xxxx, with forecasts to xxxx:-

Figure 2: Garden Products Market – UK 2004 – 2014 Constant Prices £M

nates

As illustrated ry
growth betw en
inflation is st

REPORT SAMPLE

However, co ue
to a range of th
a decline in ket
declining by g
environment

During xxxx,
discussed, pr in
demand acro r
the majority ted
by around x%
market.

With forecast
running at x. o
experience r
forecast to e
volume and h
during xxxx.
Real term gr f
xxxx, with a es
ease further and
equipment a
reflecting a r

The following chart illustrates the number of UK homes in the UK compared with the number of private gardens on an annual basis since xxxx:-

Figure 3: Number of UK Gardens & Number of Homes 2004-2014 (Milions)

es

As illustrated, t m
xx.x million in
number of UK g
an increase in

REPORT
SAMPLE

In addition, the
growth in the r
increases. 'Ga
side-effect of t
gardens are co
purchase and c

Nevertheless, t
increase in the
our forecasts a
increase in volume demand for garden products in the longer term.

2.2.3 Future Prospects

The ga
both ir ,
with bu h
rates c
above
By xxx
prices,

REPORT
SAMPLE

However, despite a more positive outlook in the medium to longer term prospects for x ... y dampen short t...

- **Downtu...** ...s & house...
- **Growth...** plot foo... gardens...
- **High U...** ...n by just x... consum...
- **Releas...** ...d the rele... xxxx.
- **Decline...** attractiv... conveni...
- **Return...** rise, rec... garden.
- **Decline...** xxxx as... holidays...

REPORT
SAMPLE

Whilst there ar... garden product... ...rs and are not ex...

There are a nu... ...h value and volu... development a... number of thes...

- **Growth...** ...y around... garden... ...y.
- **Produc...** range o... value g... new pro...
- **Market...** ...e, manufa... example... caravan...
- **Market...** primaril... garden... value re...

later. W
the curr

- **Changi**
growing ... g
addition

- **Clemer** ... x
than xx
known a
than xx

- **Market**
manufa
product
providin
longer t

REPORT SAMPLE

The following table illustrates our estimates of the share by strategic direction for the anticipated xx% market growth to xxxx:-

Chart 4: Garden Products Growth Share by Ansoff Strategy 2010-2014

Existing Product ↔ New Product

Existing Market ↕ New Market

	Existing Product	New Product
Existing Market	**Market Penetration** **xx%** (Contributing around x% growth between 2010 & 2014)	**Product Development** **xx%** (Contributing around xx% growth between 2010 & 2014)
New Market	**Market Development** **xx%** (Contributing around x% growth between 2010 & 2014)	**Diversification** **xx%** (Contributing around x% growth between 2010 & 2014)

Source: MTW Research Strategic Review 2010

Activity ir ... rs is
forecast t ... rden
products ... of the
growth ar ... erived
from exis ... ikely to
benefit fr ... arkets.

REPORT SAMPLE

Our forec ... om
marketin ... d xxxx,
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However, t n
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furniture a nefits,
coupled wit s is
forecast to x
years. Wh ese
sectors is g e
reaching th

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referred to able
growth opp onger
term. Exa
professiona

Diversificat
manufactu he
size and sc he
garden pro
activity in t
markets wi th of
around x%

REPORT SAMPLE

Whilst mar of
generating ate
amount of
Sources inc ing to
product de as
increasing

Differentia s the
threat of lo
preference roduct
which offer pliers
to add valu ear-
medium te

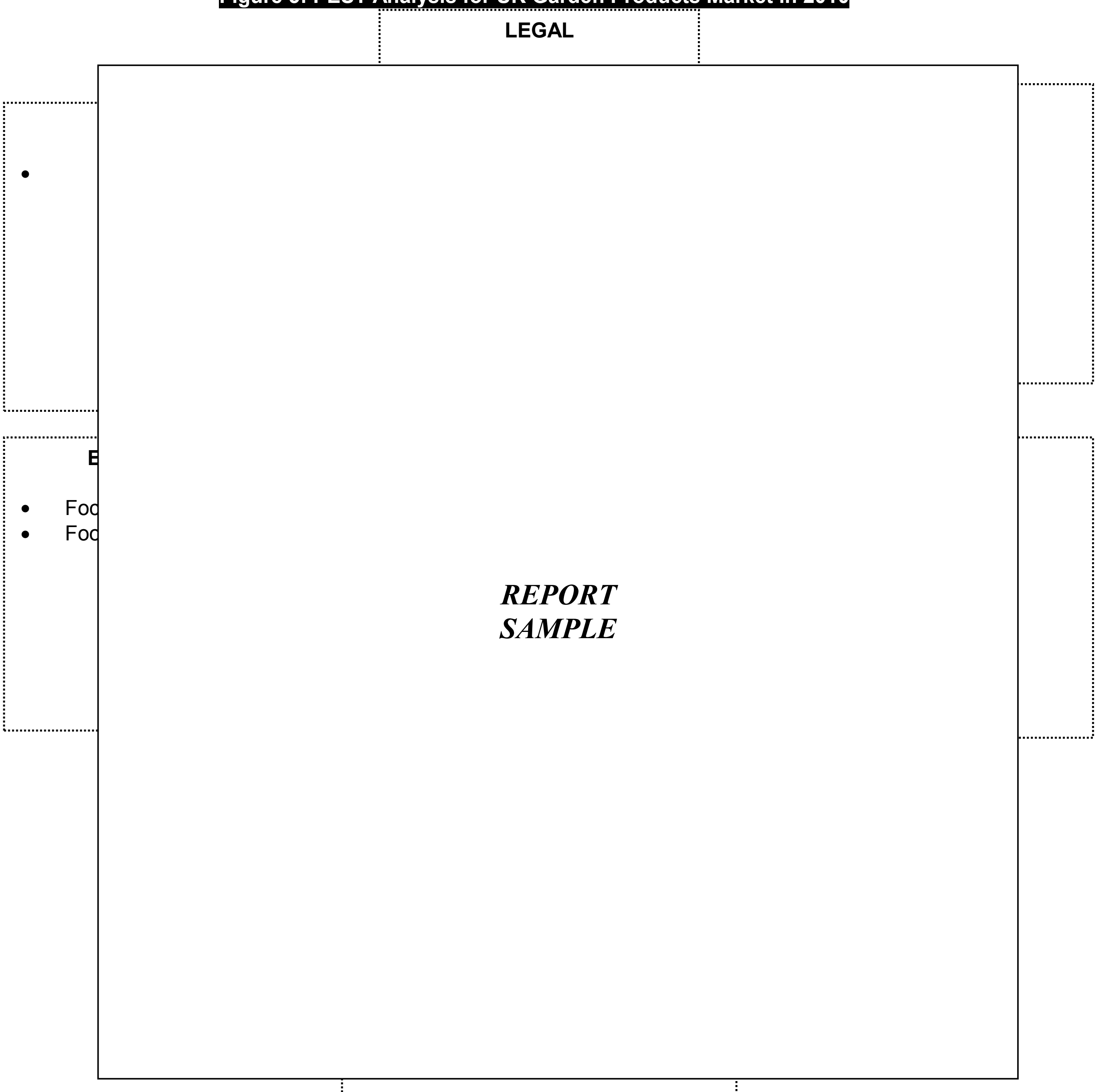
- **Ad**
- **Fle** sk
- **Mo** hen
- **Sp**
- **De**
- **Lo**
- **Fu**

2.3 KEY MARKET TRENDS IN THE GARDEN PRODUCTS MARKET

2.3.1 PEST Analysis – Illustration of Key Market Forces

There are a large number of macro market issues and trends which directly or indirectly influence UK Garden Products manufacturers, importers and retailers. These issues typically relate to political, legal, economic, environmental, social and technological factors. The following diagram provides a brief overview of some of these key issues which are currently impacting the market at present and those which may stimulate or dampen market growth in the future:-

Figure 5: PEST Analysis for UK Garden Products Market in 2010



Source: MTW Research Strategic Review 2010

Whilst the above diagram is by no means exhaustive, it provides an illustration of some of the key issues impacting the market at present and in the future.

2.3.2 Political & Legal Influences & Trends

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and in
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to tran

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marke
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with e
of stro
confid

One k
growin
migra
in rece
compr
and ch

REPORT SAMPLE

2.4 SWOT ANALYSIS – Strengths, Weaknesses, Opportunities, Threats

Following a strategic review of the garden products market, the following table identifies some of the key strengths & weaknesses evident in the market at present:-

Figure 10: Key Strengths & Weaknesses in the Garden Products Market 2010-2014

STRENGTHS	WEAKNESSES

Source: MTW Research Strategic Review 2010

Key opportunities and threats evident in the market at present include:-

Figure 11: Key Opportunites & Threats in the Garden Products Market 2010-2014

OPPORTUNITIES	THREATS
•	

Source: MTW Research Strategic Review 2010

2.5 IMPORTS & EXPORTS OF GARDEN PRODUCTS 2004-2014

The UK garden products market has been increasingly dominated by the level of lower cost imports in recent years, with this issue a key inhibitor of growth within the low-mid market sectors according to some sources.

The following chart illustrates our estimates of the level of imports of all garden products since xxxx and forecasts to xxxx in value terms:-

Figure 12: Imports of Garden Products By Value 2004-2014 £M

REPORT SAMPLE

es

It should be ... products anc ... and trade in ... estimated at ... o account for a ... l xx-xx% by v ... a and Oceania

In xxxx, tota ... e DIY multiple ... dramatic gro ... Between xxx ... market grow ... products ma ... v- mid market

Following a c ... xxxx and are ... annum in the ... total value o ... f the UK sales

The following chart illustrates the share by key originating countries for garden products imports in xxxx:-

Figure 13: Share by Key Import Region for Garden Products 2010

Source: MTW Research / Trade Estimates

As the above chart illustrates, The EU accounts for the largest share of imports of garden products to the UK, accounting for around xx% in xxxx. Asia and Oceania dominate the lower value import sector, currently accounting for around xx%, though this share would be much higher in volume terms. Eastern Europe is also significant with around xx% of imports in xxxx.

3. PRODUCT TRENDS & SHARES

3.1 Share by Key Product Sector – 2010, 2004 & 2014

The share accounted for by each of the key sectors within the UK garden products market in xxxx is illustrated in the following chart:-

Figure 14: Share by Product in Garden Products Market 2010

Trade Sources

REPORT SAMPLE

As the above … ses of a
wide range … tor of the
garden prod … and other
cooking appl … ving on
from a fairly … x and has
since experie … ctors,
though pricin … egment of
the market. … estimated
to be worth … against a
backdrop of …

The second … of
domestic ha … en timber,
paving, aggr … nated to be
worth aroun … around x%
in xxxx.

The third lar … d garden
equipment s … r £xxx
million in xx … ts market.
This sector b … th the
trend towar …

Horticultural … the
garden prod … market.

These sectors have benefited from the trend toward 'Grow your own' in the last xx-xx months and both outperformed the overall garden products market during xxxx.

In order to illustrate historical trends, the following chart illustrates the share by key product sector in xxxx:-

Figure 15: Share by Product in Garden Products Market 2004

arch / Trade Sources

REPORT SAMPLE

As the chart ... of product
shares in re... hich have grown
their share ... .

The garden ... overall market in
recent years ... xxxx to £xxx
million in xx... und x%.

The horticult... he overall
garden prod... £xxx million to
£xxx million,... arket growth of
some xx%. ... enefit from
changing co... in the short
term, with p...

The hard lan... t years, with
the rapid ris... pacting this
sector signifi... sure. Whilst
there has be... elopment of
new pourous... a slight loss in
share from x...

Rapid growt... th marginal
performance... are of the
garden shed... . However,
product development in the higher value sector has underpinned this sector over the last x-x years, preventing further declines.

The following chart illustrates the forecast share for each key product sector within the garden products market in xxxx:-

Figure 16: Forecast Share by Product in Garden Products Market 2014

REPORT SAMPLE

arch / Trade Sources

Our forecasts … in or lose
further market … rformance
stabilises acro… majority of
products.

The greenstoc… some slight
share xxxx as … short term,
though as to w… term fashion
remains to be … for around xx%
of the market … x% and rise in
market value …

With the DIY … garden
buildings mark… n intense for
lower value sh… elopment in the
higher value g… and leisure
trends, source… r from
underperformi… in the medium
to longer term… t relief to
greenhouses … erm impact of
this trend is u…

Overall, the ab… aracterised by
stability in ter… Whilst there
will obviously … l products
within each of … e majority of

sectors should experience growth at, or in line with overall market performance until at least xxxx.

3.2 Tools, Garden Equipment & Lawnmowers Market 2004-2014

The following chart illustrates the performance of the garden tools, equipment and lawnmower market by value since xxxx and forecasts to xxxx:-

Figure 17: Garden Tools, Equipment & Lawnmower Market by Value 2004-2014 £M

REPORT SAMPLE

le Estimates

The g … ust under £xxx million in xxxx at retail selling prices and includes the following key product sectors:-

- Powered Garden Tools – strimmers, hedge cutters, electric pruners, chainsaws etc
- Garden Hand Tools – forks, spades, shovels, trowels, saws, loppers, rake, shears etc
- Lawnmowers – manual, petrol, electric / battery, rotary, hover, cyclinder, ride-on.

The overal … reaching
a peak of … h
impacted …
experience … ble
incomes a …

However, … e to a
number of …

REPORT

- Clement 1914.
- 'Pent-up
- Rise in th y at home
- 'Grow yo & salads
- 'Maximur s which offer more
- Rise in N around 110,000 ne

REPORT
SAMPLE

- Product c um battery tool manufactu
- Entertaini seholders seek to spe
- Rise in A sumers and as the ng tools increases c ound 1% per annum,

Whilst a number here are a number which for the medium to longe er, the impact of inflatio a sector which is experier ort term. The secto as inflationary press formance overall.

The following chart illustrates the share by key product sector in xxxx by value:-

Figure 18: Garden Tools & Lawnmowers Market – Share by Product 2010

Source: MTW Research / Trade Sources

As illustrated, the … of the
market by value i … tail
selling prices. Tra … ve start
to the year with c … t to the
season. However … to some
extent, though th … ust.

REPORT SAMPLE

The primary drive … the
petrol rotary mark … bounce
from less positive … ary sector
also experien … sector
rising by just

Recent develo … ortunities
for the lawnm … tial for
growth in the … s not
indicated to h … ght
products whic

The garden p … the
market in xxx … g a
sector which … ct
development … f value
performance.

Whilst the ma … s indicate
that the gard … h in tools
in recent mor … ols.
Also, the risin … rt is also
underpinning … enhanced
features and

REPORT SAMPLE

3.3 Garden Timber Market & Hard Landscaping 2004 – 2014

The following chart illustrates the performance of the domestic garden timber and hard landscaping market excluding labour and professionally installed products. by value since xxxx and forecasts to xxxx:-

Figure 19: GardenTimber Market & Hard Landscaping by Value 2004-2014 £M

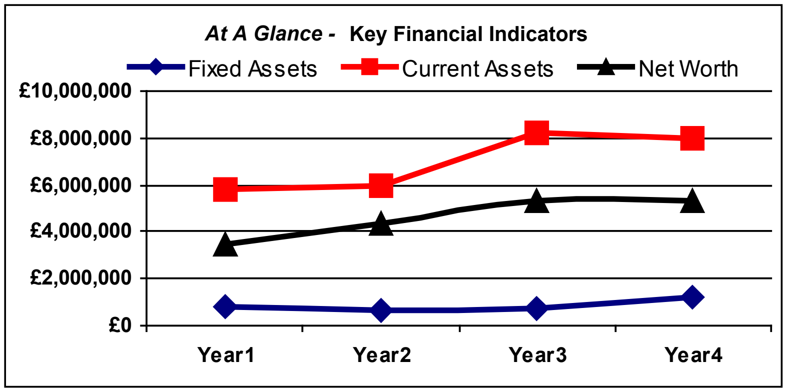
4. GARDEN PRODUCTS MANUFACTURER PROFILES

The following section identifies some of the key UK manufacturers & importers and provides a x page profile with key performance indicators for each. It should be noted that whilst we endeavour to include all the major players in the market, inclusion or otherwise in the following section does not necessarily indicate a company's relevance in the market.

4.1 Garden Products Manufacturers Profiles & KPIs

Sample Ltd - Company Overview & *'At a Glance'*

sample House
sample Way
sample Way
Surrey
CRx sample
Tel: sample



Sample Ltd is a private limited with share capital company, incorporated on October x, xxxx. The company's main activities are recorded by Companies House as "The manufacture, by injection and rotational moulding, of plastic products for domestic, horticultural and industrial purposes.". In early xxxx, the company has an estimated xx-xx employees.

To year end xx/xx/xxxx, Sample Ltd is estimated to have achieved a turnover of around £xx.xx million. Pre-tax profit for the same period is estimated at around £x.xx million. The following table briefly provides a top line overview on Sample Ltd:-

Company Name	Sample Ltd
Brief Description of Activities	The manufacture, by injection and rotational moulding, of plastic products for domestic, horticultural and industrial purposes.
Parent Company	Sample Ltd.
Ultimate Holding Company	Sample Ltd
Estimated Number of Employees	70-80
Senior Decision Maker / Director	Sample

The following table illustrates the company's key performance indicators for the last x years:-

Sample Ltd - 4 Year KPIs to Year End 30/09/2009

Key Indicator £	Year End 30/09/2006 (Year1)	Year End 30/09/2007 (Year2)	Year End 30/09/2008 (Year3)	Year End 30/09/2009 (Year4)
Fixed Assets	£801,000	£635,000	£714,000	£1,244,000
Current Assets	£5,780,000	£5,988,000	£8,212,000	£7,992,000
Current Liabilities	£3,104,000	£2,269,000	£3,592,000	£3,291,000
Long Term Liabilities	£0	£0	£28,000	£607,000
Net Worth	£3,477,000	£4,354,000	£5,306,000	£5,338,000
Working Capital	£2,676,000	£3,719,000	£4,620,000	£4,701,000
Profit per Employee	£1,094	£8,532	£14,952	£18,041
Sales per Employee	£81,543	£124,798	£141,229	£169,176

5. DISTRIBUTION CHANNELS SHARE & TRENDS

5.1 Share by Key Garden Distribution Channel 2010, 2004 & 2014

The share accounted for by each of the key distribution channels within the UK garden products market in xxxx is illustrated in the following chart:-

Figure 175 : Share by Distribution Channel for Garden Products Market 2010

ade Sources

It shoul ... r of
channel ... he above
should t

REPORT SAMPLE

Given th ... tiples
continue ... n an
estimate ... ugh the
DIY mul ... xxx,
reflectin ... across
the maj

The she ... recent
years, s ... omer
service ... the
female ... ucts,
alongsid

The sec ... t, with
around ... les
through ... nnel
having s ... etitive
channel

As the D ... ustomer
service ... unable to
compete ... h, many

of the key players in this channel have focused their market position and product portfolio to areas where the sheds are less competitive, such as the horticultural sector, higher value furniture and more specialist tools and
equipmen ... , rather
than simp ... ears,
with resta ... ter than
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The third ... ilers and
discount ... around
xx% of th ... nel are
estimated ... s.
Products ... er
volume s ... cost
imports.

The disco ... ed share
of this se ... r money
on comm
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horticultu

REPORT SAMPLE

The inter ... r around
xx% of th ... d £xxx
million at ... lower
value pro ... main
issue for ... not
able to of ... dered
very imp ... ht of a
lawnmow ... result.
These ret ... ntiator
which do ... nger
term.

The 'othe ... ecourts,
tool deale
estimated ... rden
products ... xxxx,
with prod ... e trade
oriented ... e
forecourts

In order to provide a historical context, the xxxx share for each of the key channels illustrated in the following chart:-

Figure 176: Share by Distribution Channel for Garden Products Market 2004

REPORT
SAMPLE

ources

As illustrated o
account for a f
around £x.x
grown share ly in
the garden f d
more recent

The wide ra in
the sheds b
competing d m
to longer te

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xxxxs, and nnel
continues to

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the garden llion
and highligh
recent years
focused on ms,
sources indi f
selling garde

The entranc el
some light r t
positions of t

different and as such economies of scale are unlikely to match those attained by the DIY multiples.

The recession and declining levels of consumer disposable income resulted in the supermarkets and discount food retailers performing well over the last x years, with garden products sales piggy backed on this strong customer foundation also performing well. This channel was estimated to account for In terms of future prospects, the following chart illustrates the forecast share for each key channel in xxxx:-

Figure 177: Share by Distribution Channel for Garden Products Market 2014

ade Sources

REPORT SAMPLE

The ha arket in
the me ustomer
service roduct
choice xx% of
the ma end
Decem dering
that sa n xxxx
and xx

Much c e garden
centre lised in
recent lower
value-

By xxx the
marke billion at
retail s rough the
garden
consid r a xx
year p

5.2 Garden Centres Market 2010 – Industry Trends

The following section reviews the UK garden centres market in xxxx in terms of industry structure and provides key performance indicators for the largest channel of the UK garden products market.

5.2.1 Market Mix by Growth/Decline Over Last 12 Months

The following chart illustrates the share accounted for by the number of companies reporting either a rise, contraction or static sales during the last xx months:-

Figure 178: Market Share by Garden Centres Sales Growth / Decline to January 2010

REPORT SAMPLE

ny Accounts

For the ... at more
than xx ... as 'rapid',
with sal ... the
garden ... owth
over the

Howeve ... t grew
sales ov
superfic ... one
which m ... ket at
present

One suc ... st xx
months, ... than
the aver ... over of
just £xx ... de
sources

Approxi ... n in
overall s ... continued
difficult trading conditions.

5.2.2 Industry Share by Credit Rating in 2010

Credit ratings also provide a crucial indicator as to an organisation's performance and underlying health. When combined with other companies and viewed on an industry wide basis, credit ratings also offer an effective insight into the fundamentals of a market. The following chart illustrates the share accounted for by garden centres in terms of credit rating in February xxxx:-

Figure 179: Market Share by Credit Rating in the Garden Centre Market 2010

ny Accounts

REPORT SAMPLE

Credit r ... y and
when c ... the
current

As illust ... an
'exceller ... et in
terms o ... ratings
is in par ... tion of
the com ... ore well
establis

Howeve ... evident
in the a ... edit
rating w ... caution.
Indicati ... likely
that this

At prese ... garden
centres ... ing just
under x
compan ...
pressured market in which garden products retailers operate.

5.2.3 Industry Mix by Age of Companies in 2010

The following chart illustrates the share by age of companies within the UK garden centres market as at February xxxx:-

Figure 180: Market Share by Company Age in the Garden Centres Market 2010

Accounts

REPORT SAMPLE

The garde … xx
years old … ,
reflecting … rience.
Due to rel …
companie … of the
market es … s of
trading ex … unt for
those with …

Given the … nts is
indicated … his in
part refle … siness
propositio … c or
even fall i … nd the
reluctance … rt-ups
at present …

Companie …
market in … in in
the most … ability
in the sec …
exacerbat … se
issues like … term,
particularl … to
acquire sr …

Despite th … stry is
accounted … ding

experience. These companies are generally well financed, have better cash flow and are more likely to possess key strengths such as more prominent customer awareness, wider product choice, and generally stronger order books.

5.2.4 Industry Share by Number of Employees in 2010

The following chart illustrates how the garden centres retail industry is
segmente

Fi

REPORT
SAMPLE

Accounts

The chart ons
within the ving
less than d by
relatively ctive.

There are fined
marketing on
profitabilit arket
may chan e of the
industry ir

Following s likely
to polarise o have
a more focused approach and those with a wider product portfolio competing at the lower value end of the market.

5.2.5 Industry Mix by Turnover Band in 2010

The following chart illustrates the share taken by turnover band of all the estimated x,xxx companies active in the UK garden centres market as of February xxxx:-

Figure 182: Share by Turnover Band in the Garden Centres Market 2010

REPORT SAMPLE

Accounts

Within the ... r of less than ... rising of a wide ... e portfolios.

As illustra ... turnover, ... market at present ... posed of compar ... s exposed t ... er relatively ... ash flow.

The larger ... end toward a ... ow share in th ... to increase e ... llowing an improv ... industry w ... nies seek to au ... product, price and service levels.

5.2.6 Industry Share by Location Type in 2010

The following chart illustrates the structure of the UK garden centres market in terms of office / location type in February xxxx:-

Figure 183: Mix by Location Type in the Garden Centres Market 2010

5.2.7 Industry Mix by Geographical Region in 2010

The UK garden products retail market is well represented in all areas of the UK in February xxxx, as illustrated in the following chart:-

5.4 Garden Centres Ranking & Turnover Estimates

5.4.1 Garden Centres Listing

The following identifies key market players active at present:-

Figure 193: Garden Centres Company Listing

Alford Nurseries & Garden Centre	Gordon Rigg	Plymouth Garden Centre
Alpha Garden Centre	Grasmere Garden Centre	Poplars Nursery Garden Centre
Avon Mill Garden Centre	Greenbrook Garden Centre	Pople Garden Centre
Aylett Nurseries	Grosvenor Garden Centre	Porters Horticultural
Azure Garden Centre	Haddenham Garden Centre	Quercus Garden Plants
Badger Nurseries	Harrington Hall Nursery	R & T Landscapes
Ballymoney Garden Centre	Haskins Garden Centre	R.V. Roger
Barton Grange Group	Haskins Roundstone Garden Centre	Rainworth Garden Centre
Beardsworths	Hayes Gardenworld	Read Garden Centre
Bell Plantation	Heighley Gate Garden Centre	Reuben Shaw & Sons
Bellis Bros	Highway Nurseries	Rivendell Nurseries
Blackmore & Langdon	Hillier Nurseries	Root One
Blooms of Bressingham	Holme Nurseries	Ruscrete
Blue Diamond UK	Honnor & Jeffrey	Samuel Jackson Growers
Bourne Valley Garden Centre	In-Ex U.K	Scotsdale Nursery And Garden Centre
Bridgemere Nurseries	Iver Flowerland	Seymours Gardens
Bridgford Garden Waterlife & Pet Centre	Jacksdale Garden Centre	Snowdonia Nurseries
Burston Nurseries	Kinglea Plants	Springwell Nursery & Garden Centre
C W Groves & Sons	Kings Garden & Leisure	Stansted Park Garden Centre
Caerphilly Garden Centre	Kitchen Garden Cafe	Stonepit Nurseries
Capital Gardens	Klondyke Garden Centres	Swanland Nurseries
Charlton Brook	Lanes Landscapes	The Beth Chatto Gardens
Chatsworth Garden Centre	Larch Cottage Nurseries	The Boma Garden Centre
Christies Of Fochabers Garden Centre	Longmates Nurseries	The Garden and Leisure Group
Codsall & Wergs Garden Centre	Marlows Diy & Garden Centre	The Garden Centre Group Trading (Wyevale)
Country Homes & Gardens	Matlock Garden Waterlife & Pet Centre	The Q Garden Co
Crown Nursery	Mentha Nurseries	Thompsons Plant & Garden Centre
DJ Squire & Co	Monkton Elm Garden Centre	Tong Garden Centre
Dobbie Garden Centres	Moores Nurseries & Garden Centre	Trebaron Garden Centre
Doveleys Garden Centre	National Polytunnels	Tree World Services
Dutch Imports & Daughters	Notcutts Garden Centre	Twinacre Nurseries
E H Williams Nurseries	Nurseries Direct Garden Centre	Valley Grown Nurseries
East Studdal Nurseries	Oakington Garden Centre	Van Hage & Co .
EMCY Garden and Leisure Centre	Oaklands Nursery	Vistas
Exbury Gardens Retail	Opperman Plants	Walker Home & Garden Centre
Fakenham Garden Centre	Otter Nurseries	Webbs Garden Centre
Fermoy's Garden Centre	Pantiles Nurseries	Whitehall Garden Centre
Ferndale Nursery & Garden Centre	Paramount Plants & Gardens	Willowbrook Conservatories
Finchley Nurseries	Parker's Garden Co	Woodborough Garden Centre & Nurseries
Fosseway Garden Centre	Pentland Plants	Woodcote Green Nurseries
Fromefield Nurseries	Peter Eastwood Plants	Woodthorpe Hall Garden Centre
Fron Goch Garden Centre	Planters Garden Centre	Wych Cross
Frosts Garden Centre	Plowmans Garden Nursery & Plant Centre	

Source: MTW Research / Trade Sources

The following section ranks the companies identified above by various key financial indicators. It should be noted that each company will have varying degrees of activity within this sector and will include an element of variation in terms of product and service portfolio.

Where possible, we have used the financial information reported by each company. However, for small and medium sized companies reporting obligations are less strict and these companies are not obliged to disclose turnover, profit before tax and other information such as number of employees etc. Where this data does not exist, MTW have provided an estimate based on previous performance, industry averages, other financial indicators and background knowledge of the industry.

Whilst we endeavour to attain high levels of accuracy, it should be borne in mind, therefore, that the rankings and other information provided within this report may contain an element of estimation.

5.4.2 Garden Centres Ranking By Turnover

The table illustrates our estimates of the turnover rank for each company:-

Figure 194: Garden Centres Ranked By Turnover 2009

REPORT SAMPLE

5.4.3 Garden Centres Turnover Estimates 2009

The following table illustrates the estimated turnover for each company for xxxx:-

Figure 195: Garden Centres Sales Estimates 2009 £M

Trading Name	2009 Turnover	Trading Name	2009 Turnover
	£1		£2
	£1		£2
	£		£2
	£		£2
	£		£2
	£		£2
	£		£2
	£		£2
	£		£2
	£		£2
	£		£2
	£		£2
	£		£2
	£		£2
	£		£2
	£		£1
	£		£1
	£		£1
	£		£1
			£1
			£1
			£1
			£1
			£1
			£1
			£1
			£1
			£1
			£1
			£1
			£1
			£1
			£1
			£1
			£1
			£1
			£1
			£1
			£1
			£1
			£0
			£0
			£0
			£0
			£0
			£0
			£0

REPORT SAMPLE

REPORT SAMPLE

REPORT SAMPLE

REPORT SAMPLE

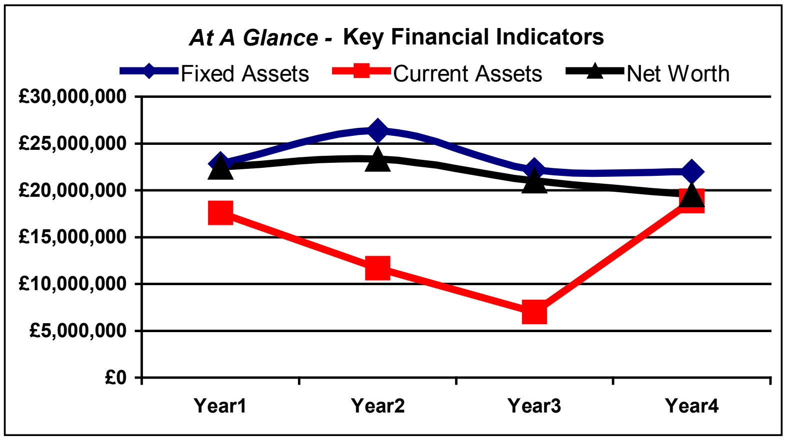
5.4.4 Garden Centres Ranking by Profitability

The following table illustrates the profit ranking for each retailer in 2010:-

5.5 Garden Centres Profiles, KPIs & 'At a Glance'

Sample - Company Overview & *'At a Glance'*

Sample
Gloucestershire
Sample
Tel: Sample



Sample is a private limited with share capital company, incorporated on October xx, xxxx. The company's main activities are recorded by Companies House as "The operation of retail garden and leisure centres.". In early xxxx, the company has an estimated xxx-xxx employees.

To year end December xxxx, Sample is estimated to have achieved a turnover of around £xx.xx million. Pre-tax profit for the same period is estimated at around -£xx.xx million.

The following table briefly provides a top line overview on Sample:-

Company Name	Sample
Brief Description of Activities	The operation of retail garden and leisure centres.
Parent Company	Sample
Ultimate Holding Company	Sample
Estimated Number of Employees	390-400
Senior Decision Maker / Director	Sample

The following table illustrates the company's key performance indicators for the last x years:-

Sample - 4 Year KPIs to Year End 28/12/2008

Key Indicator £	Year End 29/01/2006 (Year1)	Year End 28/01/2007 (Year2)	Year End 30/12/2007 (Year3)	Year End 28/12/2008 (Year4)
Fixed Assets	£22,845,000	£26,340,000	£22,190,000	£22,004,000
Current Assets	£17,542,000	£11,673,000	£6,985,000	£18,871,000
Current Liabilities	£17,540,000	£13,985,000	£7,787,000	£20,861,000
Long Term Liabilities	£319,000	£665,000	£361,000	£469,000
Net Worth	£22,528,000	£23,363,000	£21,027,000	£19,545,000
Working Capital	£2,000	-£2,312,000	-£802,000	-£1,990,000
Profit per Employee	£17,662	£5,061	-£4,148	-£3,654
Sales per Employee	£63,635	£60,477	£66,662	£68,428