

**Garden Furniture &  
Barbecues Market  
*Research & Analysis*  
*UK 2018***

**Domestic Garden Furniture & Barbecues Market Size & Trends 2012-2022; PEST  
Analysis, Product Mix 2012-2022; Channel Share 2012-2022; Manufacturers  
Profiles, Garden Centres Profiles & Key Financials; Market Forecasts to 2022**

**1st Edition**

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# 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 1 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 be 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 1 page profile for each company including full contact details for developing fast sales leads; 3 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 and market share.

- **Relevant Companies, Saving You Time**

MTW Research have been researching and writing market reports in these sectors since 1999 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

This report reviews the UK domestic garden furniture & barbecues market (jointly referred to as the 'Garden Leisure' market) between 2012 and 2018 and forecasts to 2022. The report also provides an overview of the total domestic garden products market 2012-2022 which includes a wide range of products suitable for a variety of applications within a domestic garden environment including the following key sectors:-

- **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, irrigation, 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 & vegetable plants/trees

The total combined sales of the products above are estimated to be worth just over £x billion at retail selling prices in 2018, with the market having experienced positive growth in recent years. Despite some [REDACTED] for the overall market in the near to medium term, though the interest rate rise in August 2018 and [REDACTED] spending in some sectors may represent an [REDACTED] industry in the medium term.

The research methodology for this report includes both primary and secondary research from a wide range of sources. Primary data sources include 3 years of financial data from product manufacturers and garden centres accounting for combined sales of more than £5 billion, coupled with interviews and direct input from the industry. Secondary source data includes information from HM Customs, company websites, industry journals, trade commentators, HM Government data, credit reference agencies, Companies House and our own experience of researching and reporting on this market over the last 20 years.

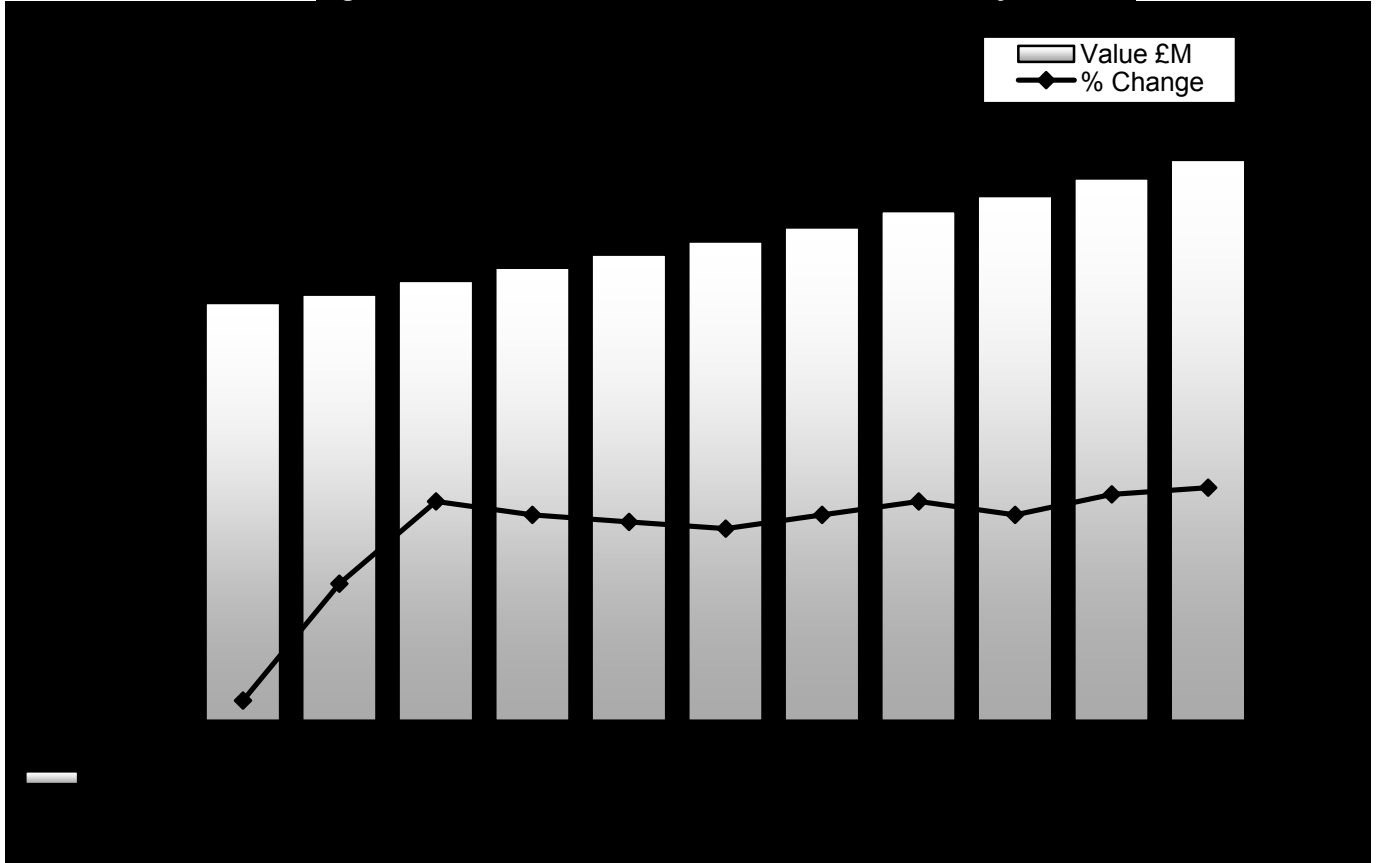


## 2.2 GARDEN PRODUCTS MARKET SIZE & TRENDS 2012-2022

### 2.2.1 Garden Products Market Size 2012-2022– Current Prices

The UK Garden Products market comprises myriad products and is estimated to be worth £ [REDACTED] in 2018 as illustrated in the following chart:-

Figure 1: Garden Products Market – UK 2012 – 2022 By Value £m



Source: MTW Research / Trade Estimates

The market has experienced average growth [REDACTED] during the last 6 years, with performance [REDACTED], before [REDACTED] onwards. [REDACTED] has remained significant across the sector with [REDACTED] on consumer budgets and confidence levels to some extent.

There are a large number of underlying factors which prompted reasonably positive performance in most sectors of the market in recent years including:-

- [REDACTED] continued to exhibit resilience in recent years.
- [REDACTED] for leisure, boosting sales of garden furniture, BBQs etc. In 2018 [REDACTED] resulted in selling season being extended considerably for furniture & barbecues in particular.
- [REDACTED] demand into the market.

- **Focus** [REDACTED] value for money – underpinning volume sales.
- **Rising** [REDACTED] in 2018.
- [REDACTED], boosting the [REDACTED]
- **Entertaining** [REDACTED], furniture & barbecues.
- [REDACTED] boosting demand for portable garden products & furniture.
- **Value** [REDACTED] declined to the level of wholesale prices (in lower value channels) therefore [REDACTED]
- **Product** [REDACTED] improved specifications across a number of sectors.

The above is by no means an exhaustive list but does illustrate some of the key underlying influences which led to the garden products market being increasingly characterised as a robust sector which has remained reasonably resilient to fluctuations in the UK economy.

Whilst the market may experience [REDACTED] growth in 2020, general future prospects are for [REDACTED] growth, [REDACTED] of macro market influences, including:-

- **Stable** [REDACTED] to 0.75%) coupled with modest salary inflation.
- **Low** [REDACTED] in general terms.
- **Growth in** [REDACTED] steadily, completions exceed 200,000 in 2018.
- **Rising** [REDACTED] a key stimulus for purchase.
- **Government** [REDACTED] buyers etc.

- **Clement** [redacted] boosted Garden Leisure product demand and extended selling season.
- **Sustained** [redacted] value imports & sustained price competition.
- **Market** [redacted] more sophisticated strategic marketing.
- **Consumer** [redacted] space, home office / work space etc.
- **Developments in** [redacted] exclusivity agreements in higher value sector.
- **Improved** [redacted] brands via Twitter etc.
- **Societal** [redacted] opportunities to add value to core product lines.

Clearly there are a wide range of factors which are likely to underpin most sectors of the garden products market and provide growth in the near to medium term.

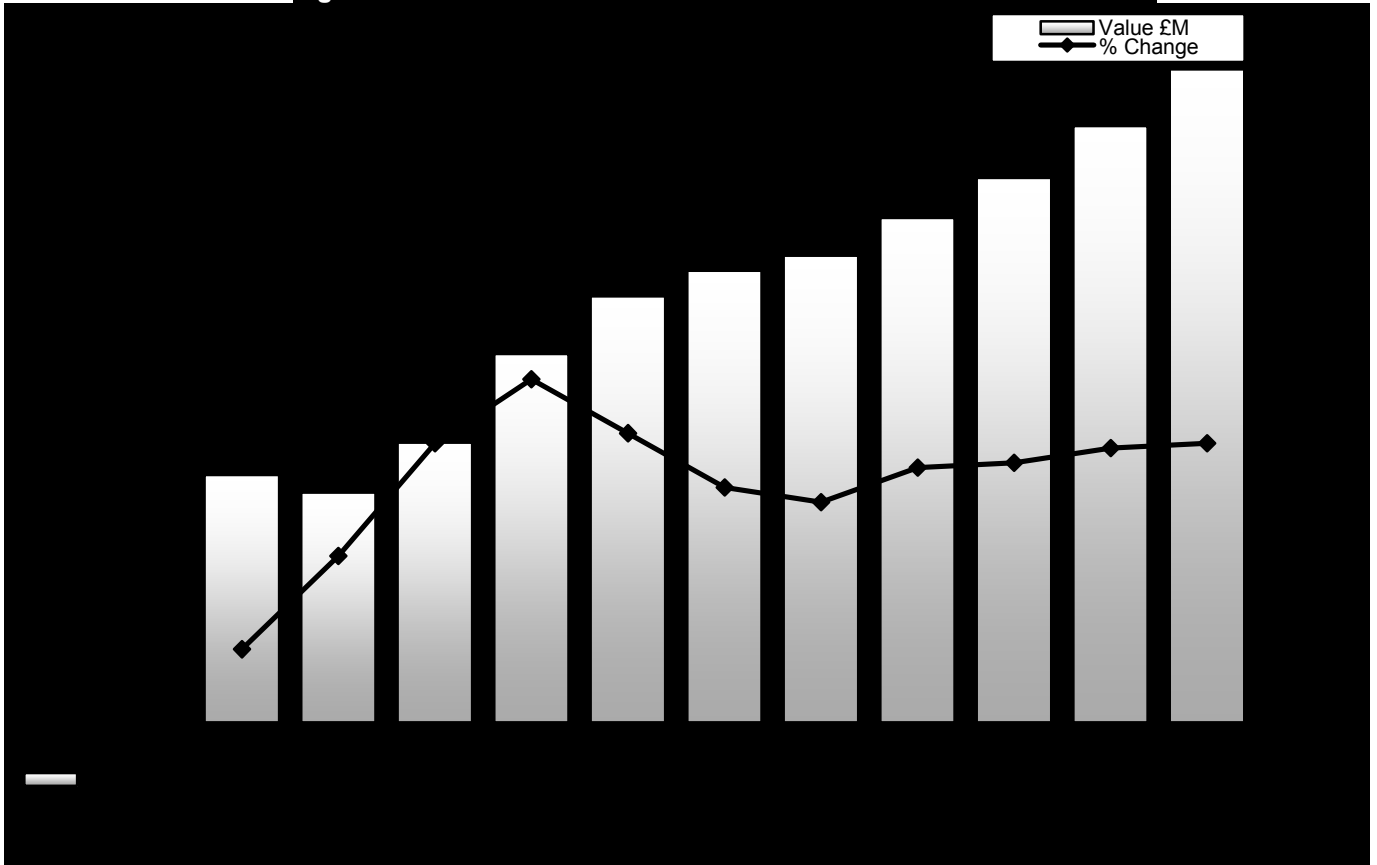
[redacted] continues to represent a key threat to market performance in 2018, particularly in the lower-mid value market where [redacted] of the industry. Rising [redacted] of quality coupled with a [redacted] continues to represent a key issue for the overall garden products market in 2018. However, there are growing indications of [redacted] budgets for garden leisure products which offer enhanced [redacted].

Longer-term prospects for the market [redacted] with the overall market set to rise to £[redacted] by year-end December 2022, reflecting growth of 14% in the next 4 years or an average of just under 3.5% per annum.

### 2.2.2 Garden Products Market Size 2012-2022–Constant Prices

The following chart illustrates the performance of the market value with consumer price index inflation stripped out since 2012, with forecasts to 2022:-

Figure 2: Garden Products Market – UK 2012 – 2022 Constant Prices



Source: MTW Research / Trade Estimates

In 'real terms', the garden products market is estimated to have [redacted] by around [redacted]% since 2012, reflecting [redacted] for the market over the last 6 years. Since 2014, growth has markedly [redacted] inflation at [redacted] boost for the market in constant price terms.

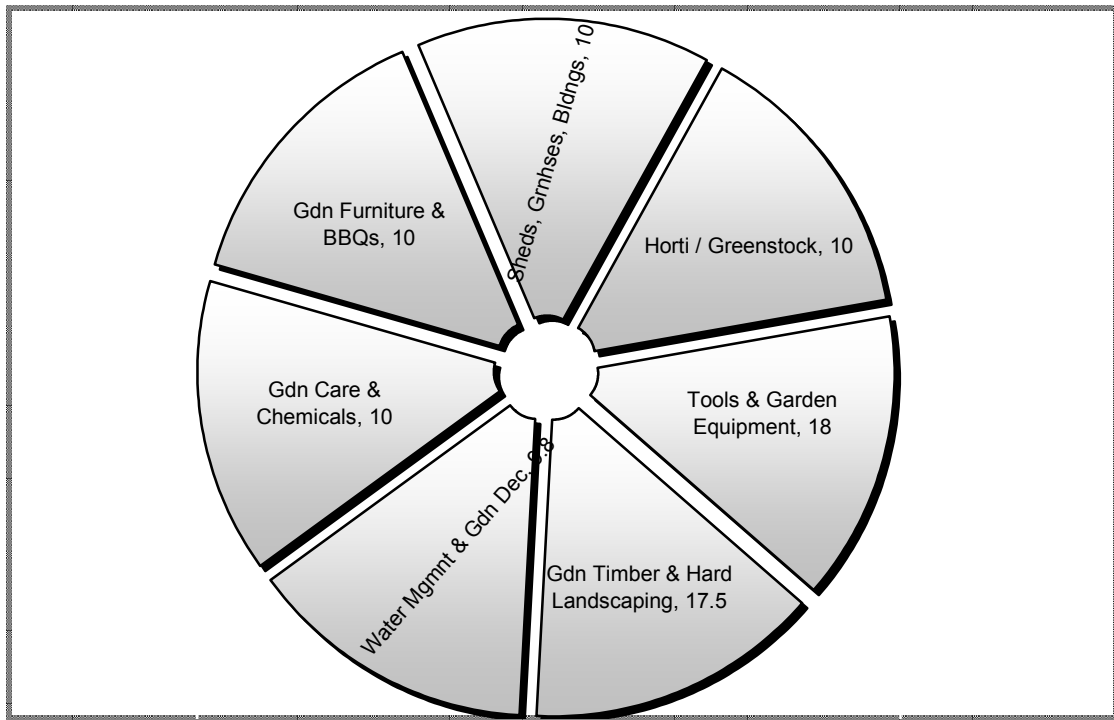
Inflation has [redacted] term growth for the market.

Medium to longer term prospects are for [redacted] which could be extended even further. By 2022 our forecasts are for the market to have grown by [redacted] forecast against a background of somewhat [redacted] conditions.

### 2.2.3 Garden Products Product Mix 2018

The share accounted for by each of the key sectors within the UK garden products market in 2018 is illustrated in the following chart:- (Figures changed for sample)

**Figure 3: Share by Product in Garden Products Market 2018**



**Source: MTW Research / Trade Sources**

The UK garden products market comprises of a wide range of product sectors as illustrated in the chart above.

The 'Garden Leisure' sector which includes furniture and barbecues accounts for the

Price

overall Garden Products market in recent years, though overall growth remains positive.

The second largest sector within the garden products industry is the for 18% of the market in 2018 reflecting a value of some £ million.

The garden timber & hard landscaping sector includes fencing, decking, garden timber, paving, aggregates and other materials and represents in 2018.

The horticultural sector is currently

retail selling prices.

Garden care and chemicals products have

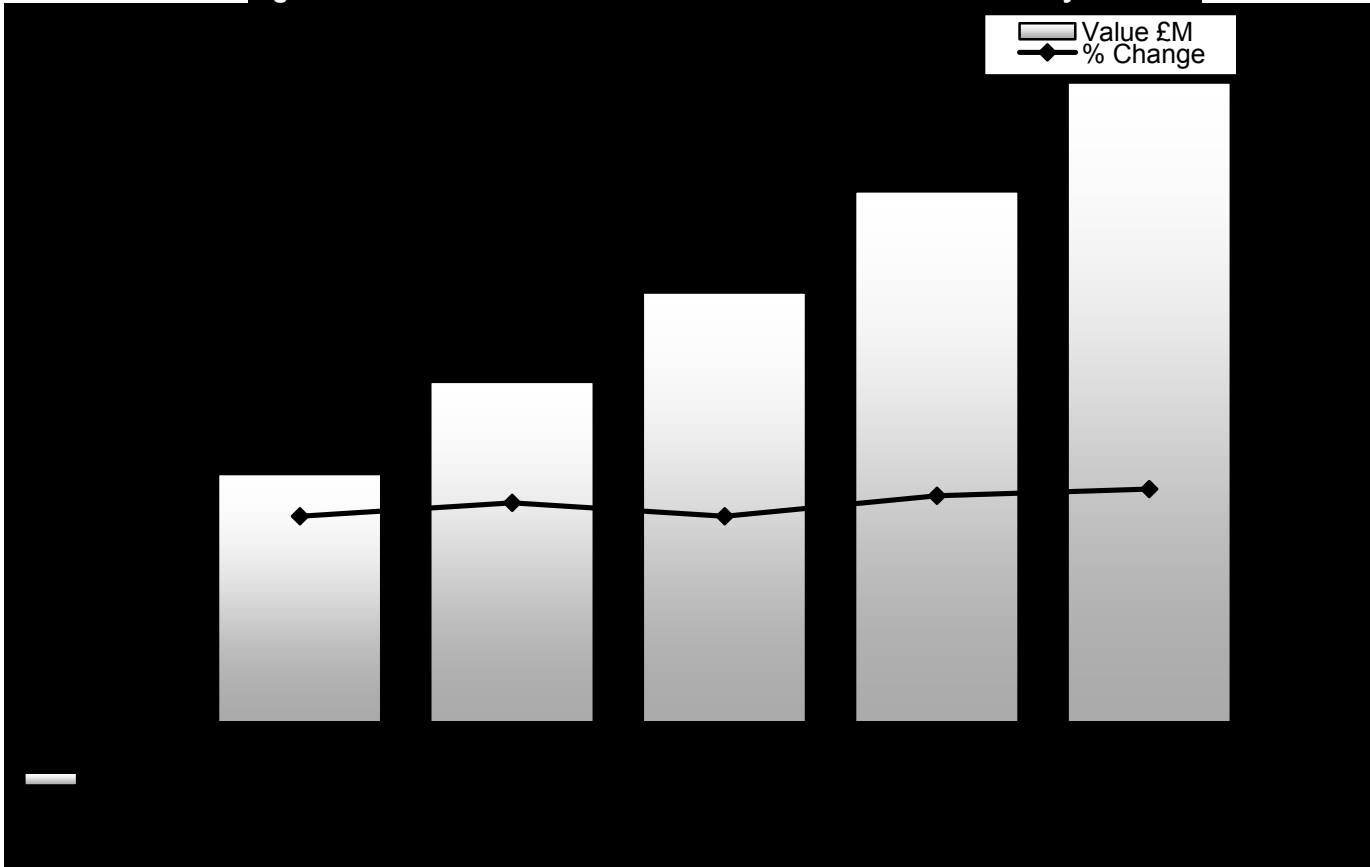
[REDACTED] % of the total garden products market.

Water management and garden decoration sales are estimated to account for around [REDACTED] at retail selling prices.

### 2.2.4 Garden Products Future Trends & Forecasts to 2022

Prospects for the UK Garden Products Market are generally positive in terms of value growth, though volume demand growth may slow to some extent in the medium term. The following chart illustrates our forecasts of the future performance of the UK Garden Products Market to 2022:-

Figure 4: Garden Products Market Forecasts – UK 2018 – 2022 By Value £m



Source: MTW Research / Trade Estimates

The market is [REDACTED]

[REDACTED]

[REDACTED] 2 year extension to 2023.

There are also a number of other key market influencers which should underpin growth for the garden products market through to 2022, including:-

➤ Sustained [REDACTED] to 2023.

Rising [REDACTED]

➤ Increasingly [REDACTED] opportunities.

➤ Low [REDACTED] low

➤ Rising [REDACTED] growth.

➤ Polarisation [REDACTED].

➤ Government [REDACTED] ctor.

➤ Growth in [REDACTED] per year.

Government [REDACTED]

➤ Social [REDACTED] etc.

➤ Shift toward [REDACTED] etc.

➤ Lower [REDACTED] to dominate.

➤ [REDACTED] patterns – increasing prevalence of [REDACTED]

➤ Increasingly [REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

The above represent some of the wider issues which should continue to [REDACTED] for the garden products market in the medium to longer term. By 2022, our forecasts are for the total garden products market to [REDACTED] a value of some £[REDACTED] billion, reflecting [REDACTED]% above the current 2018 market value.



### 3. UK GARDEN LEISURE MARKET 2018-2022

#### 3.1 GARDEN FURNITURE & BARBECUES MARKET 2012-2022

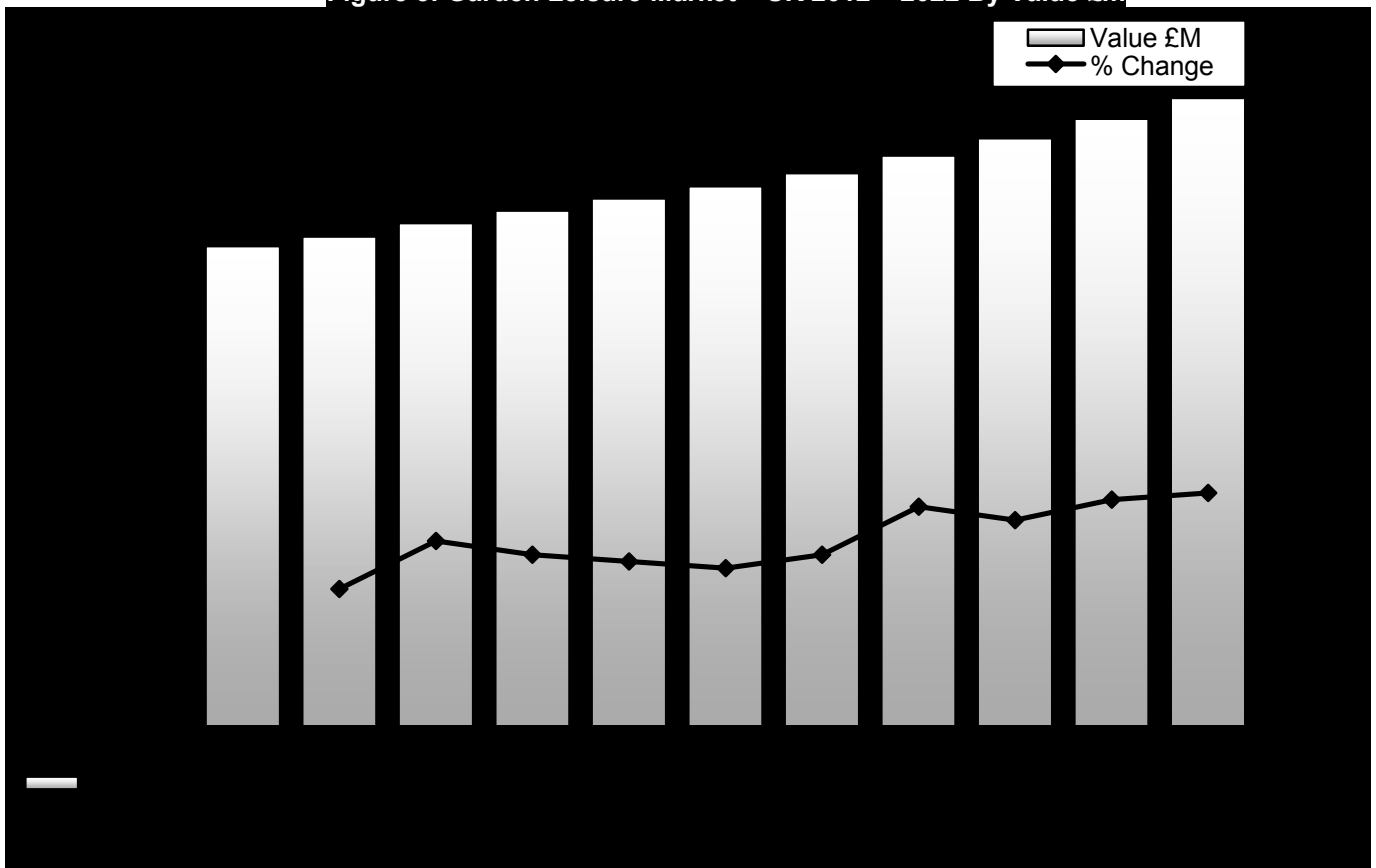
The UK Garden Leisure market is defined as consisting of the following key product sectors:-

- **Garden Furniture** – of all materials including wood, resin, metal, glass, cloth etc
- **Barbecues & Outdoor Appliances** – Gas, Electric, Charcoal, Outdoor Cooking Appliances (e.g Pizza ovens, Griddles, Braziers etc including accessories & fuel

The market is measured at retail selling prices, excluding any VAT, import taxes or charges or any delivery / installation charges.

The Garden Leisure market is estimated to be worth £[redacted] million in 2018 as illustrated in the following chart:-

Figure 5: Garden Leisure Market – UK 2012 – 2022 By Value £m



Source: MTW Research / Trade Estimates

The market has experienced average [redacted] of performance in recent years as illustrated above.

Trade sources indicate that the [redacted] 2018 start to the year in terms of sales.

The market has increased by some [redacted] % since 2012, reflecting [redacted] volume demand and

product [redacted] imports.

Given healthy [redacted] healthy rate of growth likely in the medium to longer term, despite the [redacted] uncertainties.

Given the more [redacted] cooking appliance on a permanent or semi-permanent basis, coupled with [redacted]

This trend toward [redacted] characteristic in the longer term.

This key market characteristic has [redacted] etc.

There are a number of key market influences and trends which have had a positive effect on the garden leisure market in recent years and these are likely to sustain market growth in the medium to longer term, including:-

- Garden furniture accounts for [redacted] [redacted] has offered value growth opportunities.
- [redacted] season for most products.
- Rising [redacted] confidence.
- Low [redacted] market size.
- UK [redacted] UK manufacturing.
- Rising [redacted] demand.
- Growth in [redacted]

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

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[REDACTED]

[REDACTED]

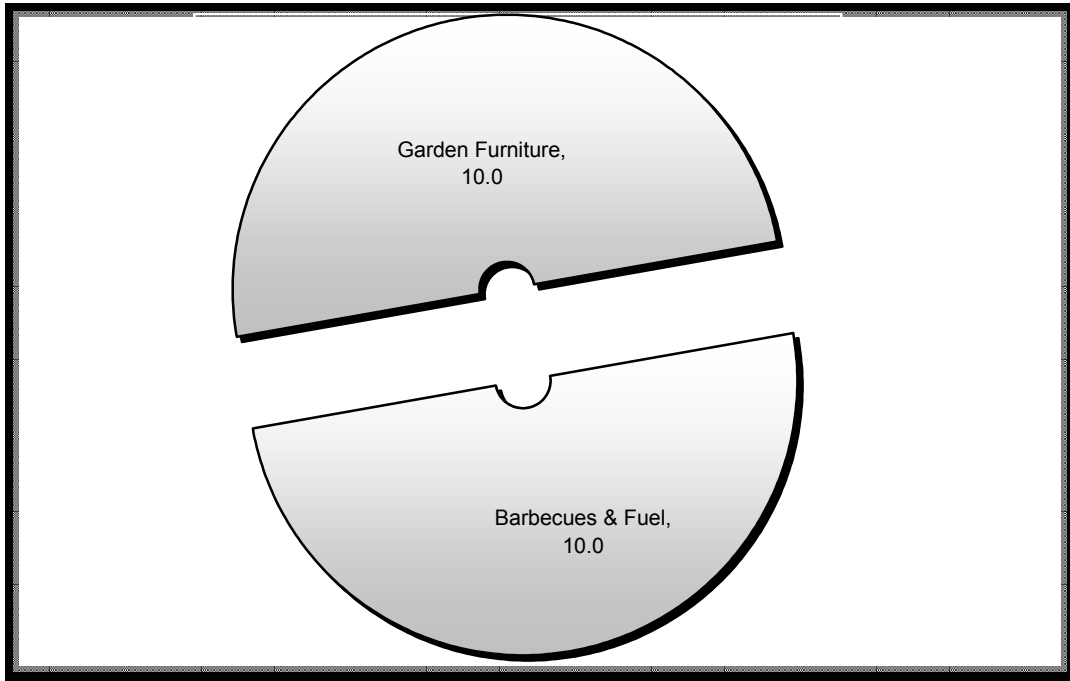
[REDACTED]

[REDACTED]

[REDACTED]

The following chart illustrates our estimates of the share by key product sector within the domestic garden furniture and barbecues market in 2018:- (Figures changed for sample)

**Figure 6: Garden Furniture & Barbecues Market - Share by Product 2018**



**Source: MTW Research / Trade Sources**

As illustrated, in 2017 the garden furniture market is currently estimated to account for around xx% of the furniture and barbecues market, reflecting a market value of around £xxx million at retail selling prices.

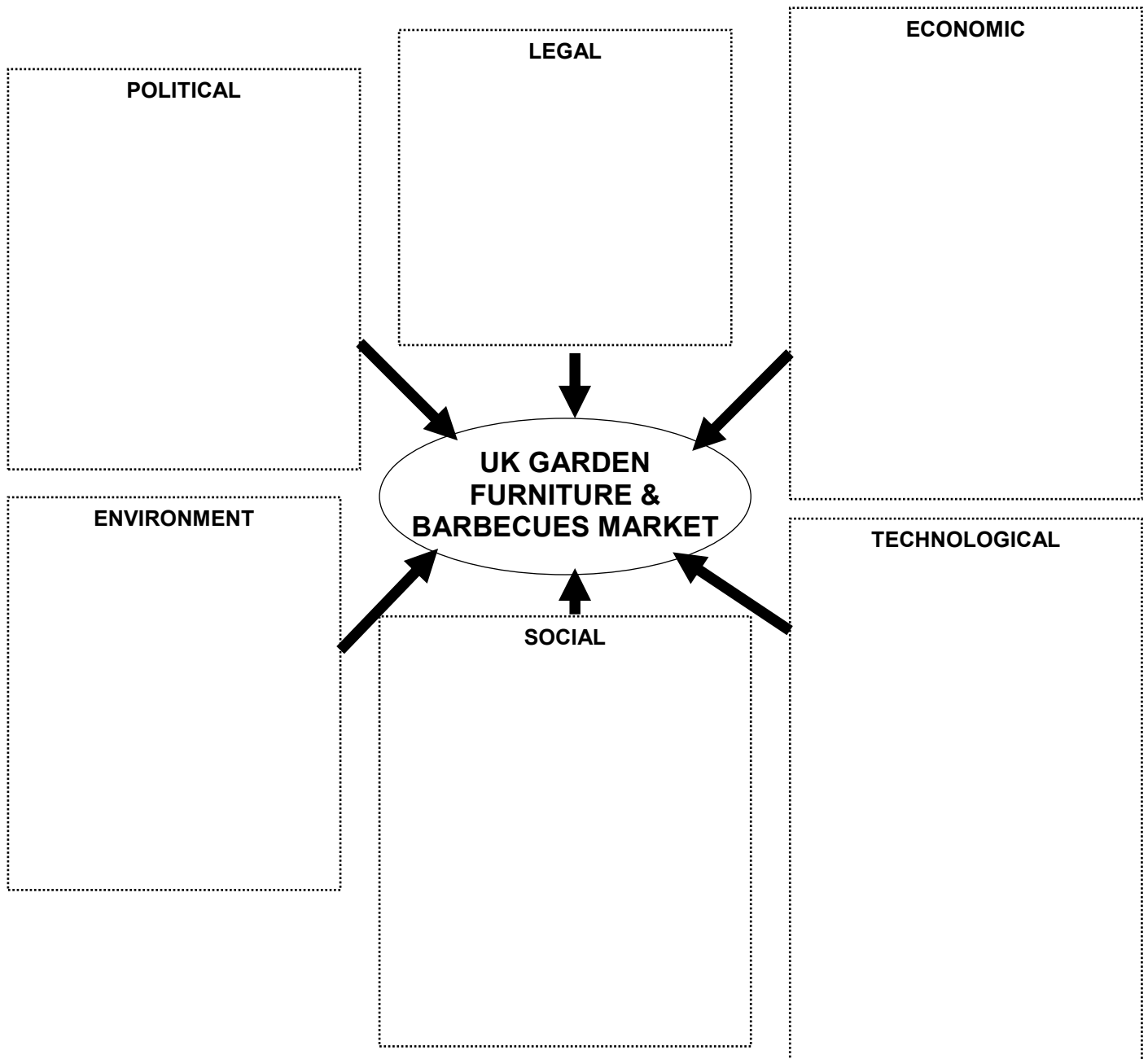
The barbecues and fuels market is currently estimated to be worth around £xxmillion, reflecting just under xx% of the market in 2018.

## 3.2 MARKET TRENDS – KEY MARKET FORCES ON GARDEN LEISURE MARKET

### 3.2.1 PEST Analysis – Key Market Forces on Garden Leisure Trends 2012-2022

There are a large number of macro market issues and trends which directly or indirectly influence the UK Garden Leisure market. 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 7: PEST Analysis for UK Garden Barbecues & Furniture Market in 2018**



**Source: MTW Research Strategic Review 2018**

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.

### **3.2.2 Number of UK Gardens 2012-2022**

One of the key influencers on this market is the number of UK gardens as this directly influences volume demand for a large number of products.

The following chart illustrates the number of UK homes in the UK compared with the number of private gardens on an annual basis since 2012:-

### 3.3 GARDEN LEISURE SWOT – Strengths, Weaknesses, Opportunities, Threats

The following table identifies some of the key strengths & weaknesses evident in the overall Garden Furniture & Barbecues Market at present:-

**Figure 24: Key Strengths & Weaknesses in the Garden Furniture & Barbecues Market 2018-2022**

STRENGTHS	WEAKNESSES
<ul style="list-style-type: none"><li>• Inherent higher</li><li>•</li></ul>	<ul style="list-style-type: none"><li>• Just over</li><li>•</li></ul>

**Source: MTW Research Strategic Review 2018**

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

**Figure 25: Key Opportunities & Threats in the Garden Products Market 2018-2022**

OPPORTUNITIES	THREATS
<ul style="list-style-type: none"><li>• Population</li></ul>	<ul style="list-style-type: none"><li>• Sustained</li></ul>



### **3.4 IMPORTS & EXPORTS OF GARDEN FURNITURE & BARBECUES 2012-2022**

In recent years the UK garden leisure market has been dominated by a high level of lower cost imports. Trade sources identify this issue as a key inhibitor of growth within the low-mid market sectors in 2018 – particularly for garden furniture. This threat of imports to value growth is set to continue represent a key market characteristic in the medium to longer term.

The following chart illustrates our estimates of the level of imports of garden furniture and barbecues since 2012 and forecasts to 2022 in value terms:-

## 4. GARDEN FURNITURE MARKET

### 4.1 Garden Furniture Market Size Current Prices 2012-2022

The performance of the UK garden furniture market is illustrated below at retail selling prices in current price terms:-

**Figure 32: Garden Furniture Market –2012–2022 Current Prices £m**

**Source: MTW Research / Trade Estimates**

Sales of garden furniture products are currently valued at just under £xxx million in 2018, reflecting an xxxxxx of xxx% to December 2018 and xxxxx of £xxx million.

Since 2012, sales of garden furniture products have increased by xxx%, xxxxxxxxxxxxxxxx market and average annual xxxxx of around xx% per annum considering the relative maturity of the market.

The market has

[REDACTED]

etc.

The market is set to

[REDACTED]

of UK consumers.

Trade sources indicate that there is a clear trend toward a rising demand for higher priced garden furniture which offer enhanced features such as:-

- [REDACTED] appeal – e [REDACTED]
- [REDACTED] / deteriorating etc
- [REDACTED] trends
- [REDACTED] designed for.
- Multi-[REDACTED]  
[REDACTED] etc.

➤ Facilitates [redacted]  
[redacted] gardens.

➤ Suitability [redacted]  
[redacted] etc.

Application [redacted]  
[redacted]

[redacted]

[redacted]

[redacted]

[redacted]

[redacted]

[redacted]

[redacted]

[redacted]

Growth in the number of

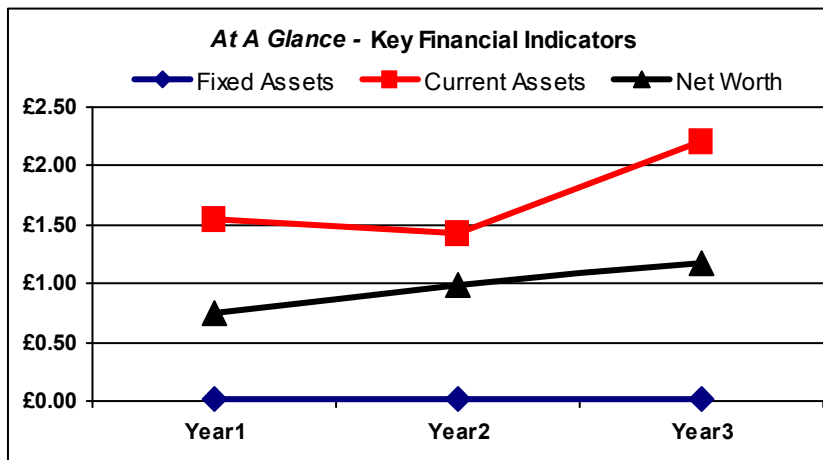
## 4.8 Garden Furniture Suppliers Financials & Profiles

The following provides a brief overview and 3 years financials for UK suppliers of garden furniture. It should be noted that whilst we endeavour to include as many key suppliers as possible, the inclusion or otherwise does not necessarily indicate a company's significance or otherwise in the market:-

### Sample. Ltd - Company Overview & 'At a Glance'

Sample  
Address  
Address  
Berkshire  
Address  
Tel: Sample

Sample. Ltd is a private limited company, incorporated on 24th July 2012. The company's main activities are recorded by Companies House as "Garden Product Suppliers" In 2018, the company has an estimated 6 employees.



To year end December 2017, Sample. Ltd is estimated to have achieved a turnover of around £6.0 million. Pre-tax profit for the same period is estimated at around £0.20 million. The following table briefly provides a top line overview on Sample. Ltd:-

<b>Company Name</b>	Sample. Ltd
<b>Brief Description of Activities</b>	Garden Product Suppliers
<b>Parent Company</b>	
<b>Ultimate Holding Company</b>	
<b>Estimated Number of Employees</b>	6
<b>Senior Decision Maker / Director</b>	Sample

The following table illustrates the company's key performance indicators for the last 3 years:-

#### Sample Ltd - 3 Year Financials to Year End 30-Sep-17

Key Indicator £M	Year End 30-Sep-15 (Year1) £M	Year End 30-Sep-16 (Year2) £M	Year End 30-Sep-17 (Year3) £M
<b>Fixed Assets</b>	£0.01	£0.01	£0.01
<b>Current Assets</b>	£1.55	£1.43	£2.21
<b>Current Liabilities</b>	£1.11	£0.5	£1.4
<b>Long Term Liabilities</b>	£1.21	£1.92	£1.98
<b>Net Worth</b>	£0.75	£0.98	£1.17
<b>Working Capital</b>	£0.45	£0.93	£0.81
<b>Profit per Employee</b>	-	-	-
<b>Sales per Employee</b>	-	-	-



## 5. OUTDOOR COOKING, HEATING & BARBECUES MARKET

### 5.1 Outdoor Cooking, Heating & Barbecue Market Size 2012-2022

The outdoor cooking appliances and barbecues market is defined as consisting of the following key product sectors:-

- Barbecues of all fuel types – including:-
  - Gas, charcoal, electric, solid fuel etc.
  - Without legs / stand – e.g. table top, portable & ‘hibachi’ style
  - Freestanding with legs, stand, wheels trolley styles
  - Kettle / Kamado / Drum barbecues
  - DIY / self build barbecues, built in barbecues (inc natural gas)

(excluding disposable barbecues)

- Outdoor Cooking / Heating Appliances – including:-
  - Firebowl / Wood Grill
  - Smokers
  - Infrared Grill
  - Pizza ovens
  - Patio Heaters / Chimineas
- Accessories – including:-
  - Covers
  - Rotisserie / griddle / grill / grate / roaster / pizza stone / sandwich iron / steamer
  - Barbecue tools
  - Fuel – LPG, charcoal, solid fuel etc

Prices are measured at retail selling prices, excluding VAT and any import or other duties and delivery costs.

The performance of the UK outdoor cooking & barbecues market is illustrated below at retail selling prices in current price terms:-

**Figure 72: Outdoor Cooking, Heating & Barbecues Market –2012–2022 Current Prices £m**

Sales of outdoor cooking appliances account for around xx% of the garden leisure market in 2018, with the sector having xxxx share in recent years as a result of xxxxxxxxxxxxxxxx by consumers.

In 2018 the sector is valued at just over £xxx million at retail selling prices, reflecting an xxxxxxxxxxxx of just under x% since 2017. The market continues to xxxxxxxxxxxx from xxxxxxxxxxxx activity xxxxxxxx in the garden xxxxxxxxxxxx sector, with xxxxxxxxxxxx also supporting xxxxxxxxxxxx end of the market.

Since 2012, sales of outdoor cooking appliances have xxxxxxxx by some xx%, reflecting a sector which has cxxxxxxxxxxxxxxxxx recent years. A renewed interest from

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED] next 4 years.

## **5.2 Outdoor Cooking, Heating & Barbecue Sales at Constant Prices 2012-2022**

The performance of the UK outdoor cooking & barbecues market is illustrated below at retail selling prices at constant 2012 prices:-