



Internet Garden Products & Online Garden Retail Market *Research & Analysis* UK 2015

Domestic Garden Products Market Size & Review 2009-2019; SWOT & PEST Analysis, Product Mix; Distribution Channel Mix; Online Garden Product Sales 2009-2019, Web Sales by Key Product; Garden Products Online Advertising Spend 2009-2019; Consumer Buying Behaviour Online for Garden Products; Leading Online Garden Retailers Profiles; Market Forecasts to 2019

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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, relevant & thought provoking profiles for key players in the market are provided alongside financial details. Within the 'Ultimate Pack' option, contact, telemarketing & mailing details are also provided for key retailers to enable the reader to quickly develop leads and grow sales quickly.

Based on company sales returns and a wide range of sources of information 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, Online & Offline**

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 market, as well as forecasting future market shares.

- **Distribution Channel Mix – Current & Future, Online & Offline**

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.

- **Online Retailing Trends & Size**

This report provides market size data for online sales for the market over the 10 year review period. The report also segments the online market by key product sector, providing detailed analysis of the current and future performance of UK sales online. The report also reviews key trends in purchasing behaviour and profiles the current trends and customer groups in terms of who is buying online.

- **Online Advertising Analysis for the Market**

This report includes a detailed analysis of advertising spend by all types of media, further segmenting this by type of online advertising – paid for search; online classifieds; banners & embedded adverts. Annual expenditure levels are provided for each key product sector, alongside analysis of the most successful web based strategies.

- **Online Retailer Profiles**

The report also provides profiles of the leading online retailers in the market, with qualitative discussion of what key brands are offered, product portfolio and company information. The report also includes turnover and profit estimates for each company, enabling you to make fast decisions on who is performing well and determine market shares.

- **Relevant Research, 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 report which is more relevant to your needs in terms of marketing and business planning. 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.

1.2 Methodology & Sources of Information for this *Research & Analysis* Report

MTW's "Research & Analysis" market reports are produced using **quantitative** data combined with **qualitative** input, resulting in high quality research reports. We uniquely combine industry sales data with relevant and insightful comment from a wide range of primary and secondary sources.

Researching these markets since 1999, our unique approach provides high levels of statistical confidence and offers an insightful discussion of current and future market trends. In addition, our *price guarantee* also ensures that MTW reports our clients will always receive the very best research at the best price.

MTW's research is purchased by leading manufacturers, distributors, retailers, venture capitalists, banks, consultants & other market report publishers. Our high level of repeat clients and close links with many trade associations ensures that you can be confident you are buying the very best in market intelligence.

Specifically, the methodology for this report included:-

Quantitative Data & Primary Research

- Industry Sales Data - Primary data sources include analysis of 3 years of financial sales data from 100+ product manufacturers and garden centres accounting for combined sales of more than £5 billion.
- HM Government Statistics – Market statistics & macro-economic data from a wide range of Government sources are included in the research.
- EU Government Statistics – Industry specific & macro-economic data.
- Telephone interviews & discussions with leading companies active across all sectors & channels of the market.

Qualitative Comment & Secondary Research

- Detailed desk research undertaken by experienced & degree qualified marketing professionals.
- Secondary source data includes information from
 - Annual Reports
 - Companies House
 - Company Websites,
 - Credit Reference Agencies,
 - HM Customs,
 - HM Government Data,
 - Industry Journals,
 - Industry Marketing Information
 - Retail Store Visits & Analysis
 - Trade Commentators,
 - Trade Shows & Exhibitions
- Our experience of researching & reporting on this market for 15 years.
- Feedback & input from our many blue chip & industry leading clients

2. GARDEN PRODUCTS PEST, SWOT & ECONOMIC TRENDS

2.1 Garden Products Market Definition & Report Scope

This report reviews the total UK domestic garden products market between 2008 and 2015 and forecasts to 2018. The report also provides in-depth analysis and market data for the sale of these products via e-commerce and the Internet – primarily through websites and online stores as well as social media. The domestic garden products market 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, xxxxxxxxs, climbers, bedding plants, ferns & grasses, shrubs, house plants, fruit & vegetable plants/trees

The total combined 'online' and 'offline' sales of the products above are estimated to be worth over £xx billion at retail selling prices in 2015, with the market having experienced xxxxxxxx xxxxx in recent years, despite a number of xxxxxxxx key market influences. Online sales of garden products are expected to exceed £xx0 million in 2015, reflecting xxxxx of xx% in the last 6 years.

Forecasts are xxxxx for the overall market in the near to medium term as a number of macro market influences are set to underpin volume and value xxxxx in a number of key product sectors. Whilst there have been some changes to the shares accounted for by the key distribution channels in recent years, the pace of change is now xxxxx resolving in a xxxxx xxxxxxxx trading environment across most key product sectors. However, online sales continue to exhibit rapid rates of xxxxx across a number of key sectors, providing significant opportunities for retailers embracing this channel. By 2019, garden product web sales are expected to be worth some £xxx million, reflecting xxxxx of more than xx% in the next 4 years.

2.2 TOTAL GARDEN PRODUCTS MARKET SIZE & TRENDS 2009-201

2.2.1 Garden Products Market Size 2009-2019– Current Prices

The UK Garden Products market comprises myriad products and is estimated to be worth just over £x.x billion in 2015 as illustrated in the following chart:-

Figure 1: Garden Products Market – UK 2009 – 2019 By Value £m

Chart Censored in Sample

Source: MTW Research / Trade Estimates

The general performance of the UK garden products market can generally be described as one which has xxxxxxxx the overall UK economy in recent years, leading to some sources characterising the market as `xxxxxxx. During our research many sources have offered an opinion contrary to this description, though on balance it appears that most product sectors and channels have exhibited xxxxx in an xxxxx difficult xxxxxxxx environment.

Whilst the overall UK economy xxxxxd by around 4% in 2009, sales of garden products xxxxxxxx by 1%, reflecting healthy performance in a difficult economic environment. Against a backdrop of xxxxxx macro-xxxxx xxxxx between 2010-2012, the garden products market exhibited a xxxx xxxxxx xxxxx as many householders xxxx xxxx xxxxxxxxxx xxxxx garden as a result of `xxxx xxxxxxxxxx; rising prevalence of xxxx xxxxxxxxxx coupled with a steady flow of xxxx xxxxxxxxxx development by manufacturers and distributors adding xxxx xxxxxxxxxx to the xxxx xxxxxxxxxx.

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

- **Improved xxxxxx** – More xxxx xxxx xxxxxxxxxx xxxxxx in general 2013 & 2014, resulting in higher usage of xxxxxxxxxx xxxxxxxxxx, boosting sales of xxxxxxxxxx xxxxxxxxxx, xxxxxxxxxx etc.
- **'xxxx xxxx** – Following the deferment of xxxxxxxxxx xxxxxxxxxx combined with xxxxxxxxxx xxxxxxxxxx in xxxxxxxxxx xxxxxxxxxx, sources indicate that an element of xxxxxxxxxx demand was xxxxxxxxxx from 2013 onwards.
- **Minimal Impact of xxxxxxxxxx** – During xxxxxxxxxx, the UK economy was yet to experience any xxxxxxxs in xxxxxxxxxx spending, resulting in reasonably buoyant xxxxxxxxxx xxxxxxxxxx conditions. Following a xxxxxx in xxxxxxxxxx, consumer confidence returned relatively quickly in 2013 resulting in a

relatively short period of low consumer confidence levels.

- **Focus on xxxxxxxx** – Manufacturers & distributors were xxxxxxxx xxxxxxxx xxxxxxxx xxxxxxxx market conditions & rising demand for xxxxxxxx xxxxxxxx which offered xxxxxxxx xxxxxxxx xxxxxxxx xxxxxxxx – xxxxxxxx volume sales.
- **Low xxxxxxxx Activity 2009-2012**– Prompting some demand for higher value landscaping & garden products as consumers sought to improve their current homes, rather than move.
- ‘xxxxxxx xxxxxxxx – Consumers seeking to e xxxxxxxx at xxxxxxxx, xxxxxxxx food and reduce xxxxxxxx xxxxxxxx turned to xxxxxxxx xxxxxxxx xxxxxxxx, boosting the xxxxxxxx xxxxxxxx xxxxxxxx media sectors.
- xxxxxxxx **at** xxxxxxxx – xxxxxxxx xxxxxxxx incomes resulted in xxxxxxxx xxxxxxxx xxxxxxxx xxxxxxxx, boosting sales of xxxxxxxx xxxxxxxx, xxxxxxxx xxxxxxxx xxxxxxxx.
- ‘xxxxxxx – Consumers increasingly xxxxxxxx xxxxxxxx xxxxxxxx UK, rather than xxxxxxxx, further boosting demand for xxxxxxxx products & xxxxxxxx xxxxxxxx.
- xxxxxxxx – In a number of product sectors, retail prices xxxxxd to the level of xxxxxxxx prices (in xxxxxxxx value channels) therefore consumers were able to xxxxxxxx xxxxxxxx xxxxxxxx.
- xxxxxxxx xxxxxxxx – Greater xxxxxxxx achieved as advances in manufacturing and xxxxxxxx resulted in a xxxxxxxx xxxxxxxx and improved xxxxxxxx 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 xxxxxxxx as a ‘xxxxxxx xxxxxxxx xxxxxxxx xxxxxxxx

The UK economy began to exhibit improving performance in 2013 with an overall xxxxxxxx of just under 2% in GDP, reflecting a steady if somewhat modest recovery from the economic doldrums of the previous 5 years. This recovery was sustained in 2014 and early 2015, prompting a xxxxxx in both business and consumer confidence providing a more xxxxxxxx macro environment for the UK garden products market. In the last couple of years, there have been a number of key market influences which have sustained xxxxxx which in 2014 was estimated at just over x%.

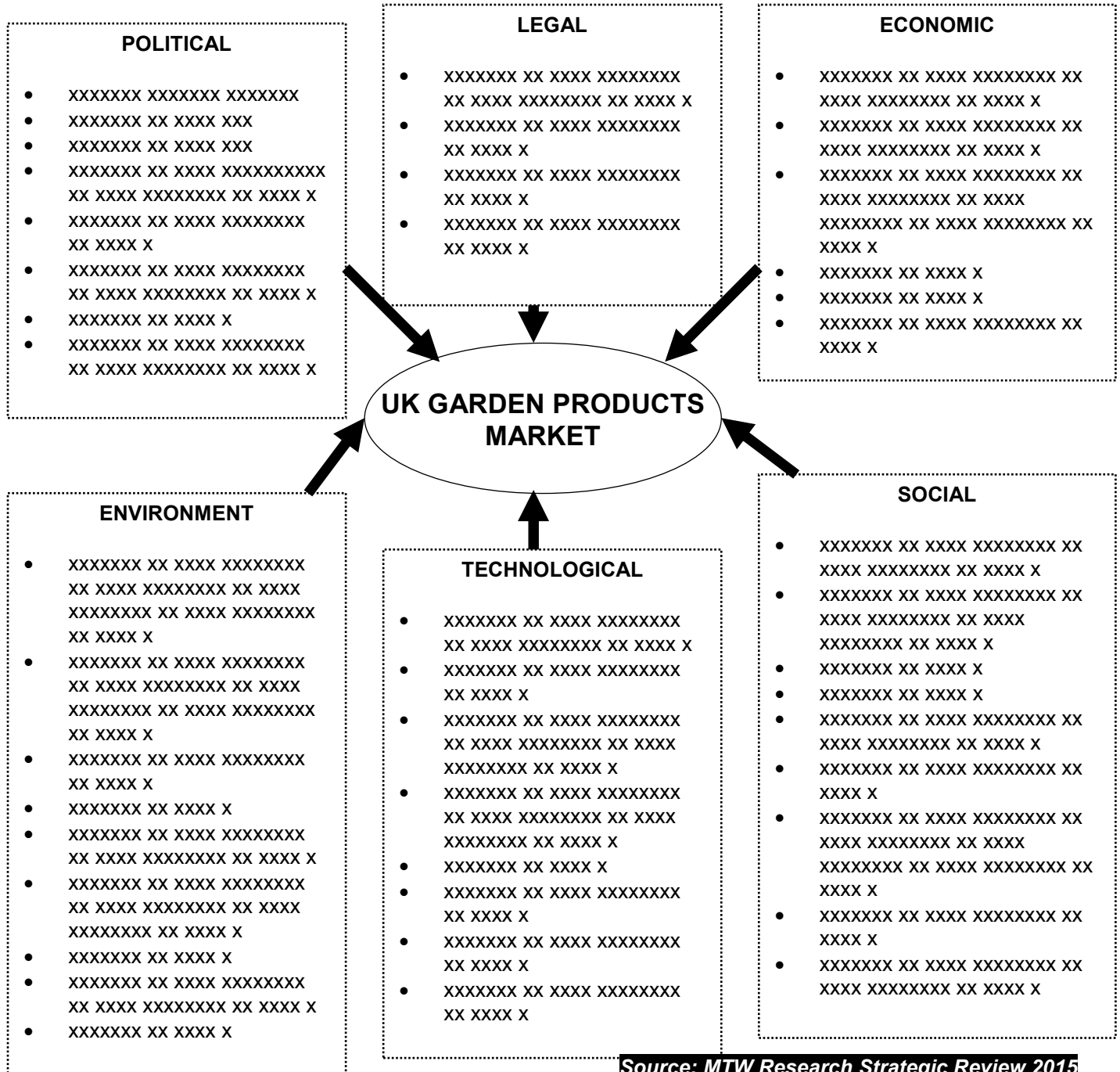
These xxxxxx influences which have underpinned the market and are likely to sustain xxxxxx in 2015 and beyond include:-

-

2.5 PEST Analysis of Garden Products Market & Online Retailing

There are a large number of macro market issues and trends which directly or indirectly influence UK garden product manufacturers, distributors, 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 impacting the market at present and those which may stimulate or dampen market xxxxx in the future:-

Figure 12: PEST Analysis for UK Garden Products Market & Online Retailing in 2015



Source: MTW Research Strategic Review 2015

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.

2.6 SWOT Analysis for Garden Products Market & Online Retailing

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

Figure 13: Key Strengths & Weaknesses in the Garden Products Market 2015-2019

STRENGTHS	WEAKNESSES
<ul style="list-style-type: none"> • Lorem ipsum sepsum comment censored in this report lorem ipsum • Lorem ipsum sepsum comment censored in this report lorem ipsum • Lorem ipsum sepsum comment censored in this report lorem ipsum • Lorem ipsum sepsum comment censored in this report lorem ipsum ipsum sepsum comment censored in this report lorem ipsum sepsum comment censored in this report lorem ipsum • Lorem ipsum sepsum comment censored in this report lorem ipsum • Lorem ipsum sepsum comment censored in this report lorem ipsum ipsum sepsum comment censored in this report lorem ipsum • Lorem ipsum sepsum comment censored in this report lorem ipsum • ipsum sepsum comment censored in this report lorem ipsum ipsum sepsum comment censored in this report lorem ipsum • ipsum sepsum comment censored in this report lorem ipsum • ipsum sepsum comment censored in this report lorem ipsum ipsum sepsum comment censored in this report lorem ipsum • ipsum sepsum comment censored in this report lorem ipsum • Lorem Lorem Lorem Lorem Lorem Lorem Lorem Lorem Lorem Lorem Lorem • Lorem ipsum sepsum comment censored in this report lorem ipsum • Lorem ipsum sepsum comment censored in this report lorem ipsum • Lorem ipsum sepsum comment censored in this report lorem ipsum • Lorem ipsum sepsum comment censored in this report lorem ipsum • Lorem ipsum sepsum comment censored in this report lorem ipsum • 	<ul style="list-style-type: none"> • Just under Lorem ipsum sepsum comment censored in this report lorem • Lorem ipsum sepsum comment censored in this report lorem Lorem ipsum sepsum comment censored in this report lorem • Lorem ipsum sepsum comment censored in this report lorem Lorem ipsum sepsum comment censored in this report lorem Lorem ipsum sepsum comment censored in this report lorem • Lorem ipsum sepsum comment censored in this report lorem • Lorem ipsum sepsum comment censored in this report lorem Lorem ipsum sepsum comment censored in this report lorem • Lorem ipsum sepsum comment censored in this report lorem • Lorem ipsum sepsum comment censored in this report lorem • Lorem ipsum sepsum comment censored in this report lorem • Lorem ipsum sepsum comment censored in this report lorem Lorem ipsum sepsum comment censored in this report lorem • Lorem ipsum sepsum comment censored in this report lorem Lorem ipsum sepsum comment censored in this report lorem • Lorem ipsum sepsum comment censored in this report lorem Lorem ipsum sepsum comment censored in this report lorem Lorem ipsum sepsum comment censored in this report lorem • Lorem ipsum sepsum comment censored in this report lorem Lorem ipsum sepsum comment censored in this report lorem • Lorem ipsum sepsum comment censored in this report lorem • Lorem ipsum sepsum comment censored in this report lorem • Lorem ipsum sepsum comment censored in this report lorem Lorem ipsum sepsum comment censored in this report lorem • Lorem ipsum sepsum comment censored in this report lorem • Lorem ipsum sepsum comment censored in this report lorem Lorem ipsum sepsum comment censored in this report lorem

2.7 Number of Internet Users in UK 2009-2019

The number of Internet users in the UK has a significant impact on the performance of the online garden retail market. The following chart illustrates the number of UK consumers in the UK who use the Internet either for product information, research or purchasing online between 2009-2019:-

Figure 15: Number of UK Internet Users 2009-2019

Censored

Source: MTW Research / Trade Estimates

There are currently some xxx million Internet users in the UK, reflecting some xx% of the total UK population in 2015, with this figure having xxxxxn consistently in recent years.

Xxxxx in xxx education, the maturing home xxxxxx market, developments in broadband xxxxxx xxxxxx and sustained investment from xxxxxx xxxxxx amongst other factors have continued to support xxxxx in the number of Internet users in the UK. Since 2009, the number of users has xxxxxn by some x% in the last 6 years with this trend set to xxxxxx xxxxxx in the xxxxxx to xxxxxx term.

By December 2019, our forecasts suggest that just of xx million UK consumers will use the Internet, reflecting xxxxx of around x% in the next 4 years. By 2019, some xx% of the UK population is likely to use the Internet for either xxxxxx xxxxxx or xxxxxx, xxxxxx the xxxxxx xxxxxx of this channel in the near to medium term.

2.8 Future Prospects for Online Garden Products Retailing

Online sales of garden products are expected to xxxxxx to xxxxx at a pace which is set to xxxxxx xxxxxx sales in the overall garden products market in the medium to longer term.

The following chart illustrates the likely performance of the online garden products retail market from 2015, with forecasts to 2019:-

Figure 16: UK Online Garden Products Sales by Value 2015-2019

Censored

Source: MTW Research / Trade Estimates

By the end of 2015 are expected to reach some £xx million, reflecting an xxxxx of just under x% in comparison to the expected x% xxxxx in the overall garden products market during the same period.

This trend of the Internet continuing to xxxxxxxx the overall garden products market is expected to xxxxxxxx the market in the longer term. The following chart illustrates the annual forecast xxxxx for online sales compared to overall sales in the garden products market:-

Figure 17: UK Online & Offline Garden Products Sales % Growth Rates 2015-2019



Source: MTW Research / Trade Estimates

As illustrated, online sales of garden products are expected to xxxxxxxx by between x% per annum in the next 4 years, in comparison to the overall garden products market which is forecast to xxxxx by x% over the same period.

To year end December 2019, online sales of garden products are expected to have xxxxxxxxd by some 32% whilst total garden products sales are set to xxxxx by around 15%, underlining the rising importance of the online channel in the near to medium term.

There are a number of key macro and micro market factors which will continue to influence the performance of the performance of the online garden products market in the medium to longer term, including:-

- Sustained xxxxx

3. GARDEN PRODUCTS MARKET SIZE & TRENDS 2009-2019

3.1 Definition of UK Garden Products Market

This report reviews the entire UK domestic garden products market between 2009 and 2015 and forecasts to 2019.

The domestic garden products market 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, xxxxxxxxs, climbers, bedding plants, ferns & grasses, shrubs, house plants, fruit & vegetable plants/trees

3.2 Total UK Garden Products Market Sales by Value 2009-2019 £M

The UK Garden Products market comprises myriad products and is estimated to be worth just over £6 billion in 2015 as illustrated in the following chart:-

3.7 Garden Furniture & Barbecues Sales Value & Trends 2009-2019

The following chart illustrates the performance of the UK garden furniture and barbecues market by value since 2009 and forecasts to 2019:-

Figure 27: Garden Furniture & Barbecues Market by Value 2009-2019

Censored

Source: MTW Research / Trade Estimates

The UK garden furniture and barbecues market is currently estimated to be worth around £xx5 million at retail selling prices in 2015. This market is defined as consisting of the following key product sectors:-

- Garden Furniture –including wood, resin, metal, glass etc.
- Barbecues, Outdoor Ovens & Fuel – Including barbecue accessories and all fuel types (excluding single use portable barbecues.)

Sales of garden furniture and barbecues have performed

The following chart illustrates our estimates of the share by key product sector within the domestic garden furniture and barbecues market in 2015:-

Figure 28: Garden Furniture & Barbecues Market - Share by Product 2015

Censored

Source: MTW Research / Trade Sources

As illustrated, in 2015 the garden furniture market is currently estimated to account for around x0% of the furniture and barbecues market, reflecting a market value of around £x30 million at retail selling prices.

Whilst expansion into the sector by the xxx xxxxxx xxx and xxx xxxxxx xxx retailing has sustained xxx xxxxxx xxx within the garden furniture sector to some extent, indications are that volume demand has xxxxxn this to some extent. In addition, continued xxx xxxxxx xxx development toward xxx xxxxxx xxx value products has also generated added value in the sector, sustaining market xxxxx.

Sources indicate that within the

4. INTERNET GARDEN PRODUCTS MARKET SIZE & TRENDS

4.1 Definition of UK Online Garden Products Web Retail Market

The online garden products market is defined as consisting of the following key product 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, xxxxxxxxs, climbers, bedding plants, ferns & grasses, shrubs, house plants, fruit & vegetable plants/trees

The following section identifies the value of sales for the above individual product sectors which are transacted via the Internet.

For the purposes of clarification, 'the Internet' is defined as the system of connected computers created in January 1983 when the research network Arpanet and the Computer Science Network (CSNET) were linked together. This system is connected by a Transmission Control Protocol/Internet Protocol (TCP/IP) which sends & receives data using interconnected web pages based on Hypertext Transfer Protocol (HTTP) – collectively known as the World Wide Web. The Internet is also defined as consisting File Transfer Protocol (FTP) to send and receive files and Simple Mail Transfer Protocol (SMTP) to transfer emails.

The terms 'web', 'online' and 'Internet' used throughout this report refer specifically to the above definition/ Sales transacted via any other inter-network, intranet or extranet is specifically excluded from this analysis.

Sales values are expressed at retail selling prices in current price terms and % xxxxx / xxxxx values are expressed in current prices – e.g. at CAGR (compound annual xxxxx rates). Delivery costs, labour, installation, VAT, import taxes and any other associated charge, cost or tax are specifically excluded from the analysis.

4.2 Online Sales of Garden Products by Value 2009-2019 £M

The following chart illustrates the value of the online garden products market since 2009 with forecasts to 2019:-

Figure 34: Online Garden Products Market by Value 2009-2019

Censored

Source: MTW Research / Trade Estimates

Sales of garden products through the Internet are currently valued at just under £xxx million at retail selling prices in 2015, reflecting an xxxxxxxx of some x% over the 2014 figure of £xx million.

Since 2009, sales are xxxxxxxx to have xxxxxxxxx by some x%, reflecting an xxxxxxxx in the market value of almost £xxx million in the last 6 years. Between 2009 and 2015, more than £x.x billion of garden products have been sold via the Internet, reflecting the importance of this rapidly growing channel.

Short term forecasts are for sales to xxxxx by around x% in 2016, with similar rates of xxxxx likely in the medium term as the channel continues to xxxxx share of the overall garden products market.

To year end December 2019, the Internet is expected to account for almost xx% of the market, reflecting sales of just under £xxx million. Between 2015 and 2019, online sales are forecast to xxxxx by some 32%.

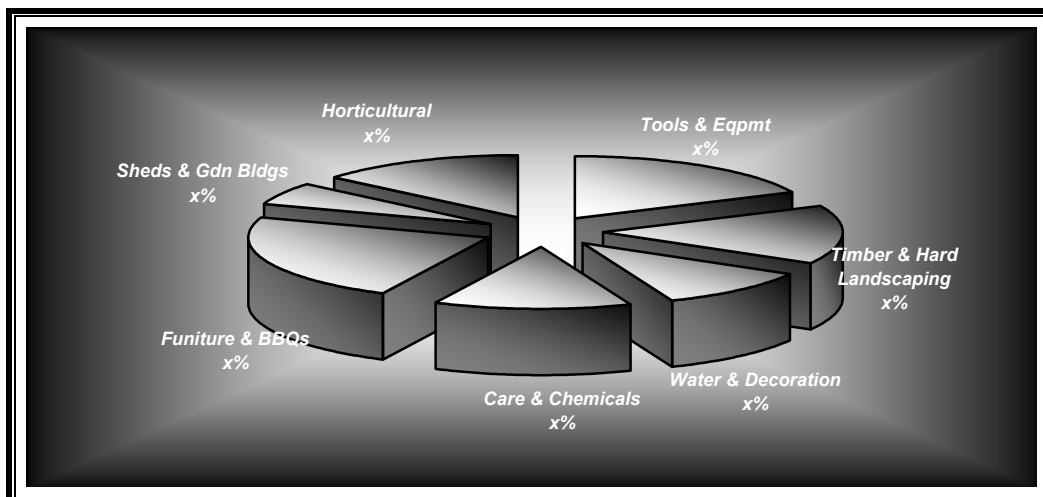
4.3 Web Sales of Garden Products - Share by Key Product Sector 2009-2019

The following section illustrates and discusses the shares accounted for by key product sector within the online garden products market since 2009, with forecasts to 2019.

4.3.1 Online Sales by Key Garden Product 2015

The following chart illustrates the share by value accounted for by each of the key product sectors in the online garden products market in 2015:-

Figure 35: Online Garden Products Market - Share by Product 2015



The xxxxxxx sector of the online garden products market in 2015 is accounted for by garden xxx xxxxxx xxx and xxx xxxxxx xxx which is estimated to be worth some £x36 million at RSP, reflecting a share of some 23%.

The xxxxxxx xxxxxxx sector is accounted for by sales of xxx xxxxxx xxx and xxx xxxxxx xxx, with xxx xxxxxx xxx and xxx xxxxxx xxx in particular selling well online according to sources, as consumers seek the xxx xxxxxx xxx xxx xxxxxx xxx possible for a product which they have previously specified in a xxx xxxxxx xxx xxx xxxxxx xxx store. In 2015, sales of xxx xxxxxx xxx xxx xxxxxx xxx are estimated to account for around 18% of the market, reflecting sales of £x07 million.

xxx xxxxxx xxx xxx xxxxxx xxx items are often considered less suitable for online transactions due to higher delivery costs. However, there are also benefits in offering these products online, rather than in a bricks and mortar store, as merchandising space for these larger products is xxx xxxxxx xxx. As such, for 'commodity' type items – such as xxx xxxxxx xxx xxx xxxxxx xxx xxx xxxxxx xxx s etc the online channel is indicated to be growing in importance amongst consumers who are more experienced in what products to specify and for those using xxx xxxxxx xxx xxx xxxxxx xxx to guide their product choice.

As a result, whilst the majority of xxx xxxxxx xxx sales are offline, web sales of these products are reasonably important in 2015 with sales expected to continue to xxxxx in the longer term. In 2015, around 15% of online garden product sales are accounted for by the xxx xxxxxx xxx sector, reflecting a market value of around £x0 million.

The xxx xxxxxx xxx sector of the market is also experiencing healthy rates of xxxxx, with an increasing number of smaller suppliers having entered the market in recent years due to lower barriers of entry. Increasingly, smaller, more specialist suppliers are developing an online presence and xxxxxxxx share of the market. These lower volume, higher value suppliers are typically able to offer xxx xxxxxx xxx of xxx xxxxxx xxx, higher xxx xxxxxx xxx products and more xxx xxxxxx xxx. In 2015, sales of xxx xxxxxx xxx products online are estimated at around £x3 million, reflecting a share of some 14% of the online garden products market.

4.3.2 Online Sales by Key Garden Product 2009

In order to provide an historical perspective, the following chart illustrates the share by value accounted for by each of the key product sectors in the online garden products market in 2009:-

Figure 36: Online Garden Products Market - Share by Product 2009

4.8 Online Garden Furniture & Barbecues Web Sales & Trends 2009-2019 £M

The following chart illustrates the performance of the online garden furniture and barbecues market by value since 2009 and forecasts to 2019:-

Figure 42: Online Garden Furniture & Barbecues Market by Value 2009-2019

Censored

Source: MTW Research / Trade Estimates

The total UK garden furniture and barbecues market is currently estimated to be worth around £xxx million at retail selling prices in 2015. This market is defined as consisting of the following key product sectors:-

- Garden Furniture –including wood, resin, metal, glass etc.
- Barbecues, Outdoor Ovens & Fuel – Including barbecue accessories and all fuel types (excluding single use portable barbecues.)

Online sales of garden furniture and barbecues are currently valued at around £xxx million in 2015, reflecting an annual xxxxxxxx of just under x%. Whilst this sector continues to experience xxx xxxxxx xxx xxx xxxxxxxx xxx sustained by a xxx xxxxxxx xxx xxx xxxxxxx xxx xxx xxxxxxx xxx online sales are expected to continue to xxx xxxxxxx xxx xxx xxxxxxx xxx xxx xxxxxxx xxx of the sector in the longer term.

Since 2009, sales transacted via the Internet have xxxxxxn by almost xx% in the last 6 years, reflecting the xxx xxxxxxx xxx xxx xxxxxxx xxx of xxxxx in comparison to offline sales which have xxxxxxxxd by 12% over the same period. In terms of near term prospects, web sales are expected to xxxxxxxx further xxx xxxxxxx xxx, with online sales rising by x% in 2016.

Longer term prospects are for this online share xxxxxxxx to continue to xxxxxxxx the furniture and barbecues market. To year end December 2019 our forecasts are for online sales to be worth £x73 million, reflecting an xxxxxxxx of just under 30% in the next 4 years.

5. ONLINE CONSUMER PURCHASING BEHAVIOUR & TRENDS

The following section provides a sales breakdown for online garden product sales by consumer type – segmented by gender, age, location and weekly income. Annual sales for each criteria are provided since 2009 with forecasts to 2019.

5.1 Online Sales of Garden Products to Males by Value 2009-2019

The following chart illustrates the value of online garden product sales to males since 2009, with forecasts to 2019:-

Figure 45: Male Consumers – Online Garden Product Purchases by Value 2009-2019

Censored

Source: MTW Research / Trade Estimates

Online sales of garden products to males are currently valued at just over £xx million in 2015, reflecting just xxxx xxxx of the market value at present. Since 2014, sales are estimated to have xxxxxxxxd to this consumer group by just over x%.

Since 2009, purchases by males are estimated to have xxxxxxxxd by around x%, in comparison with the total online garden products market having xxxxxn by just over 45%. Whilst this sector of the market is xxxxx xxxx share at present, this share xxx xxxxxx xxx is relatively xxx xxxxxx xxx and is unlikely to xxx xxxxxx xxx xxx xxxxxx xxx in the online garden products market in the medium to longer term.

In terms of future prospects, sales of online garden products to males are expected to xxxxx by just under 7% in 2016, with similar rates of xxxxx likely in the medium to longer term. To year end December 2019, our forecasts are for sales to reach just under £xx million, reflecting an xxxxxxxx of xx% in the next 4 years.

5.2 Online Sales of Garden Products to Females by Value 2009-2019

The following chart illustrates the value of online garden product sales to females since 2009, with forecasts to 2019:-

5.5 Online Garden Product Sales by Consumer Weekly Income 2009-2019

The following section identifies the value of sales by key customer segment in terms of weekly income, with sales per annum provided since 2009 and forecast to 2019.

5.5.1 <£200 Consumer Income – Web Garden Product Sales Value 2009-2019

The following chart illustrates the value of sales of online garden products to consumers within this income bracket since 2009, with forecasts to 2019:-

Figure 66: <£x00 Weekly Income – Online Garden Consumer Sales by Value 2009-2019

Censored

Source: MTW Research / Trade Estimates

Sales to consumers with weekly incomes of less than £200 are currently estimated to account for around x% of the online garden products market in 2015, reflecting an annual xxxxxxxx of just over xx% this year.

Sales to this consumer segment are estimated to have xxxxxxxxd by x% in the last 6 years, reflecting a sector which has xxx share of the overall market and xxxxxxxx xxxxxxxx in value terms.

Nevertheless, sales are expected to continue to xxxxx, despite this share loss, with xxxxx of x% expected in 2016 and similar rates of performance likely in the medium to longer term.

In terms of longer term prospects for this sector, our forecasts are for sales to reach just under £xxx million to year end December 2019, reflecting an xxxxxxxx of x% in the next 4 years.

5.5.2 £200-£499 Consumer Income – Web Garden Product Sales Value 2009-2019

The following chart illustrates the value of sales of online garden products to consumers within this income bracket since 2009, with forecasts to 2019:-

Figure 67: £x00-£x99 Weekly Income – Online Garden Consumer Sales by Value 2009-2019

6. GARDEN PRODUCTS ADVERTISING TRENDS 2009-2019

The following chapter identifies the total value of spending on advertising by the entire garden products market between 2009 and 2019 and provides a breakdown of sales by each key advertising media. The following also analyses the current spending on advertising online and segments expenditure by online advertising type such as 'paid for searches', 'banners' and 'social media' spending etc.

6.1 Total Advertising Spend on Garden Products 2009-2019 – All Media

Expenditure on advertising has xxxx xxx xxxxx in recent years across the majority of media as both garden product manufacturers and retailers have xxxxx xxxx xxxxx their online presence.

The following chart illustrates the annual expenditure by the entire garden products industry on all advertising since 2009, with forecasts to 2019:-

Figure 71: Total Annual Expenditure on Advertising All Garden Products 2009-2019

Censored

Source: MTW Research / Trade Estimates

Total spending on advertising by the UK garden products market in 2015 is currently valued at around £xxx million, reflecting a xxx xxxxxx xxx market and one which has continued to experience xxx xxxxxx xxx of xxxxx – particularly in the last couple of years. Between 2009 and 2012, xxxxx in expenditure remained xxx xxxxxx xxx with the market xxx xxxxxx xxx by around x% over this period.

xxx xxxxxx xxx xxx xxxxxx xxx trading conditions combined with an improving xxx xxxxxx xxx environment supported xxx xxxxxx xxx of xxxxx from 2013 onwards, xxx xxxxxx xxx by x% in 2013, followed by a x% xxxxxxxx in 2014.

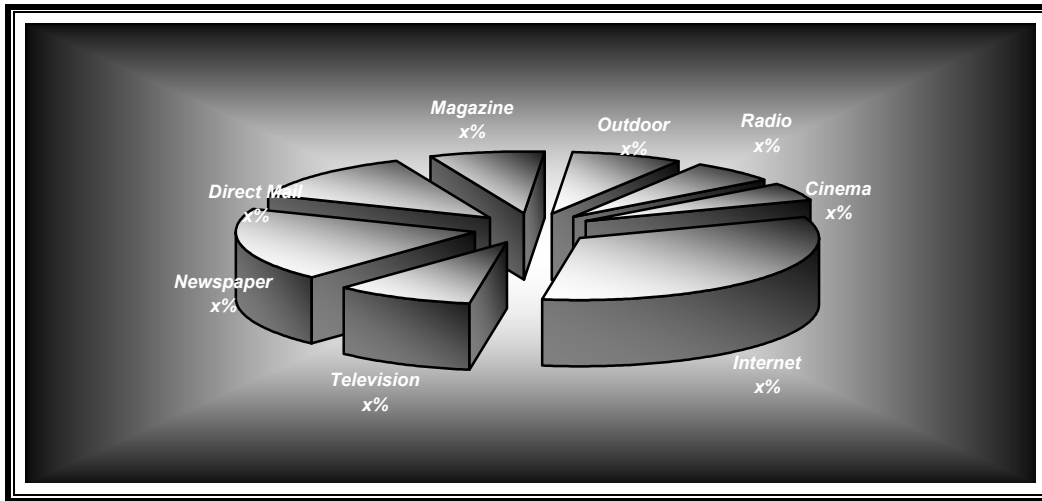
In 2015, total advertising spend on the UK garden products market is likely to xxxxx by just under x%, reflecting more xxxxxxxx trading xxx xxxxxx xxx. In terms of near to medium term prospects, spending is forecast to xxxxx by x% per annum in the next few years.

By December 2019, the advertising market for garden products is forecast to be worth some £xxx million, reflecting an xxxxxxxx of some xx% in the next few years. This xxxxx is likely to be supported by ongoing xxx xxxxxx xxx xxxxx in the garden products market, coupled with sustained xxx xxxxxx xxx xxx xxxxxx xxx development xxx xxxxxx xxx employed by a xxx xxxxxx xxx manufacturers and retailers across a xxx xxxxxx xxx xxx xxxxxx xxx of media.

6.2 Garden Product Advertising – Share by All Media Types 2015

The following chart illustrates the share accounted for by each media type within the garden products advertising market in 2015:-

Figure 72: Garden Product Advertising Market - Share by Media Type 2015



Source: MTW Research / Trade Sources

As illustrated xxx xxxxxx xxx advertising has overtaken xxx xxxxxx xxx advertising to become the xxxxxx sector of the UK garden products advertising market in 2015, accounting for some xx% of the market. In 2009, the Internet accounted for just x%, underlining the rapid rate of xxxxx experienced in this sector in recent years.

xxx xxxxxx xxx advertising remains a key component of the market at around 28%, though is indicated to have lost some share in the last couple of years to other media – notably the xxx xxxxxx xxx sector.

xxx xxxxxx xxx xxx xxxxxx xxx advertising have continued to experience difficult trading conditions in recent years, with xxx xxxxxx xxx advertising losing share from 22% in 2009 to current levels of around 15%. xxx xxxxxx xxx advertising has also lost share from 8% in 2009 to current levels of around 4%.

Despite rising xxx xxxxxx xxx xxx xxxxxx xxx has not lost substantial share of the market in recent years, falling from around 12% to just under 11% in 2015. In this instance, xxx xxxxxx xxx also includes xxx xxxxxx xxx which has experienced rapid rates of xxxxx in volume terms, though actual spending on this activity remains low due to the inherent xxx xxxxxx xxx of xxx xxxxxx xxx other than xxx xxxxxx xxx purchase.

Advertising of garden products through the cinema is xxx xxxxxx xxx in 2015, accounting for around x%, with radio advertising also relatively xxx xxxxxx xxx at around x%. Indications are that these sectors are unlikely to experience any real change in the medium to longer term.

6.3 Digital Online Advertising Spend on Garden Products 2009-2019

The digital advertising sector of the garden products advertising market is currently estimated to be worth around £xxx million in 2015, as illustrated in the following chart:-

Figure 73: Annual Expenditure on Online Advertising for Garden Products 2009-2019

Censored

Source: MTW Research / Trade Estimates

Spending on digital, online advertising by the UK garden products industry currently stands at around x% of total turnover, having experienced xxxxx each year since 2009.

As illustrated, since 2009 expenditure in this sector has xxxxxn by almost £xxx million, reflecting an xxxxxxxx of x% in the last 6 years. The xxxx xxx of xxxxx in this sector xxx xxxxxx xxx from 2013 onwards as xxx xxxxxx xxx xxx xxxxxx xxx and xxx xxxxxx xxx xxxxx returned to the market, xxx xxxxxx xxx marketing budgets.

This characteristic of the market is likely to continue in the medium to longer term as xxxxx in the online garden products market continues to xxxxx. In 2016, sales are expected to xxxxx by x%, following a xxxxx of some x% in 2014. To year end December 2019, our forecasts are for sales on online advertising to xxxxxxxx by some x%, to reach a value of around £x82 million.

Of the total of £xx million which will be spent on digital advertising in 2015, some x% will be accounted for by 'paid for search', and a further x% on 'banners and embeds'. The remainder will be accounted for primarily by classified advertising online.

6.3.1 'Paid for Search' Advertising Expenditure for Garden Products 2009-2019

The following chart illustrates the level of expenditure on paid for search advertising by the UK garden products market since 2009 with forecasts to 2019:-

Figure 74: 'Paid for Search' Online Expenditure on Garden Products 2009-2019

Censored

Source: MTW Research / Trade Estimates

The 'paid for search' sector of the market represents xxx xxxxxx xxx of all expenditure by the garden products industry on online advertising. In 2015, spending on this sector is expected to be worth some £xx million, reflecting an annual xxxxxxxx of x% this year.

As illustrated, spending on this sector has

6.4 Top 20 Most Successful SEO Activities for Online Garden Products Market 2015

There are a wide range of SEO (search engine optimisation) techniques which can boost the ranking of a website page on search engines. The following briefly identifies some of the more popular methods of boosting a website ranking for garden product suppliers and retailers as part of an integrated online digital marketing plan:-

1. Increase the overall quality of the website
2. Increase content on website
3. Increase frequency of updates
4. Increase backlinks & changes to website
5. Increase number of links from other sites (10 or above)
6. Increase number of unique visitors
7. Reduce number of bounce rates on other sites
8. Relevant content from other sites (e.g. gardening)
9. Links from high authority pages
10. Correct use of meta tags, alt tags etc
11. Correctly use keywords with key words
12. Correct use of tags, etc.
13. Relevance of content
14. Relevance of key content
15. Increase number of web visitors
16. Increase frequency of use of content
17. Use of social media & tools, etc
18. Reduce bounce rate from other sites or 'bounce'.
19. Listing on high authority sites
20. Remove low quality content

Whilst there are a number of other factors which influence the ranking on search engines, the above highlights some of the more important issues to consider when undertaking or commissioning SEO activities.

6.5 Successful Website Strategies for Online Garden Products Market 2015

The following illustrates an example of a successful website & online marketing strategy for a vertically integrated garden product manufacturer & retailer which is highly ranked on search engines, has high levels of organic traffic and successfully translates this into sales:-

Website

- High quality content
- High quality content
- Updated
- Correct content strategy
- Clear content purchase
- Suitability for desktop

- Link to ipsum dispusm semprum nomenclature

Social Media

- Use of ipsum dispusm semprum nomenclature ipsum dispusm semprum nomenclature identity
- Attract, ipsum dispusm semprum nomenclature ipsum dispusm semprum nomenclature followers
- Inform ipsum dispusm semprum nomenclature ipsum dispusm semprum nomenclature feedback
- Answer ipsum dispusm semprum nomenclature ipsum dispusm semprum nomenclature ipsum dispusm semprum nomenclature
- Direct ipsum dispusm semprum nomenclature ipsum dispusm semprum nomenclature ipsum dispusm semprum nomenclature sign up

Online Advertising

- Effective ipsum dispusm semprum nomenclature websites
- Use of ipsum dispusm semprum nomenclature ipsum dispusm semprum nomenclature etc.

Paid for Search Terms

- Targeted ipsum dispusm semprum nomenclature ipsum dispusm semprum nomenclature expenditure

Email Marketing

- Use of ipsum dispusm semprum nomenclature
- Special ipsum dispusm semprum nomenclature ipsum dispusm semprum nomenclature

Offline Marketing

- Brand ipsum dispusm semprum nomenclature ipsum dispusm semprum nomenclature ipsum dispusm semprum nomenclature ipsum dispusm semprum nomenclature visits
- Targeted ipsum dispusm semprum nomenclature ipsum dispusm semprum nomenclature ipsum dispusm semprum nomenclature social media / ipsum dispusm semprum nomenclature

Whilst the above represents a simplified illustration of what trade sources have indicated is a successful online digital marketing strategy, it nonetheless underlines the need for integration of a number of online platforms. Increasingly, sources suggest that there is a growing need to be present in a rising number of online platforms in order to continue to drive sales growth.

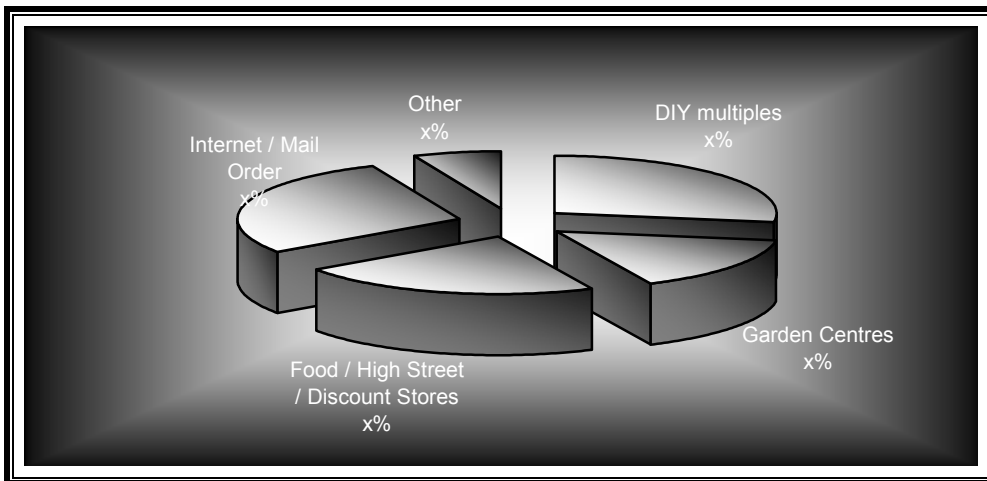
7. GARDEN PRODUCTS DISTRIBUTION CHANNELS & TRENDS

The following section provides shares of the key distribution channels for the total UK garden products market in 2015, with historical and future shares also provided. The xxxxxxxx 50 garden centres are also identified along with brief profiles of more than 30 of the leading online garden retailers active in the market in 2015.

7.1 Garden Products Distribution Sales by Channel 2015

The share accounted for by each of the key distribution channels within the UK garden products market in 2015 is illustrated in the following chart:-

Figure 79 : Share by Distribution Channel for Garden Products Market 2015



Source: MTW Research / Trade Sources

It should be noted that due to an element of overlap between a number of channels, estimating the share by channel is particularly complex and the above should therefore be regarded as guideline estimates only.

Trade sources indicate that the ipsum dispusm semprum nomenclature continue to dominate the distribution of garden products in the UK, with an estimated share of around x% in 2014. Sales of garden products through the xxx sector are estimated around £x.x billion by year end 2015, reflecting a substantial market dominated by ipsum dispusm semprum nomenclature products across the sectors identified in this report.

The ongoing trend of ipsum dispusm semprum targeting the ipsum dispusm semprum customer, combined with a ipsum dispusm semprum choice, ipsum dispusm semprum ipsum dispusm semprum, improved ipsum dispusm semprum and ipsum dispusm semprum has underpinned this channel's xxxxx in garden products. In recent years the ipsum dispusm semprum have continued to develop product ranges in ipsum dispusm semprum sectors, adding ipsum dispusm semprum through ipsum dispusm semprum and enhanced ipsum dispusm semprum / ipsum dispusm semprum levels. Whilst this has generated some ipsum dispusm semprum opportunities for the channel, the majority of sales remain ipsum dispusm semprum

Indications are that Garden Centres have

7.2 Top 50 Garden Centres Listing

The following identifies 50 of the leading UK garden centre companies active in the UK in 2015:-

- | | | |
|------------------------------|----------------------------|----------------------------|
| 1. The ipsum dispusm semprum | 19 Lorem Ipsum Company Ltd | 37 Lorem Ipsum Company Ltd |
| 2. Lorem Ipsum Company Ltd | 20 Lorem Ipsum Company Ltd | 38 Lorem Ipsum Company Ltd |
| 3. Lorem Ipsum Company Ltd | 21 Lorem Ipsum Company Ltd | 39 Lorem Ipsum Company Ltd |
| 4. Lorem Ipsum Company Ltd | 22 Lorem Ipsum Company Ltd | 40 Lorem Ipsum Company Ltd |
| 5. Lorem Ipsum Company Ltd | 23 Lorem Ipsum Company Ltd | 41 Lorem Ipsum Company Ltd |
| 6. Lorem Ipsum Company Ltd | 24 Lorem Ipsum Company Ltd | 42 Lorem Ipsum Company Ltd |
| 7. Lorem Ipsum Company Ltd | 25 Lorem Ipsum Company Ltd | 43 Lorem Ipsum Company Ltd |
| 8. Lorem Ipsum Company Ltd | 26 Lorem Ipsum Company Ltd | 44 Lorem Ipsum Company Ltd |
| 9. Lorem Ipsum Company Ltd | 27 Lorem Ipsum Company Ltd | 45 Lorem Ipsum Company Ltd |
| 10 Lorem Ipsum Company Ltd | 28 Lorem Ipsum Company Ltd | 46 Lorem Ipsum Company Ltd |
| 11 Lorem Ipsum Company Ltd | 29 Lorem Ipsum Company Ltd | 47 Lorem Ipsum Company Ltd |
| 12 Lorem Ipsum Company Ltd | 30 Lorem Ipsum Company Ltd | 48 Lorem Ipsum Company Ltd |
| 13 Lorem Ipsum Company Ltd | 31 Lorem Ipsum Company Ltd | 49 Lorem Ipsum Company Ltd |
| 14 Lorem Ipsum Company Ltd | 32 Lorem Ipsum Company Ltd | 50 Lorem Ipsum Company Ltd |
| 15 Lorem Ipsum Company Ltd | 33 Lorem Ipsum Company Ltd | 51 Lorem Ipsum Company Ltd |
| 16 Lorem Ipsum Company Ltd | 34 Lorem Ipsum Company Ltd | |
| 17 Lorem Ipsum Company Ltd | 35 Lorem Ipsum Company Ltd | |
| 18 Lorem Ipsum Company Ltd | 36 Lorem Ipsum Company Ltd | |

It should be noted that the above list is not exhaustive and is based on limited companies only – given the nature of the industry there may be other businesses active which are larger in terms of either profitability or profit.

7.3 Top 20 Specialist Online Garden Retailers' Profiles

The following section identifies and profiles 20 of the leading specialist online garden retailers active in the UK in 2015. A brief description of website address, ranges and brands offered, company turnover and profitability are provided alongside an employee size band estimate where available. Whilst we endeavour to include all relevant companies, it should be noted that the following is not an exhaustive list and inclusion or otherwise in this report does not necessarily reflect a company's significance in the market.

Lorem Ipsum Sample Co were established in 1969 and pride themselves in claiming to be the first online garden centre. Their website can be found at www.lorem.co.uk and offer a wide range of products including garden furniture, patio heaters, Barbecues outdoor lighting, garden buildings including, sheds summer houses, cabins, playhouses, arbours, pet houses and greenhouses, tools ornaments, seeds and bulbs.

Brands stocked include Alexander Xxxxxxxx and Bellagio furniture, Webber Barbecues, Kontsmide lighting, Crane garden sheds and buildings. Sample Garden Buildings Ltd was established in 2005, turnover is estimated to be around £3 million and an estimated 20-30 employees with around £200k profit.

SAMPLE END