



Garden Products & Equipment Market *Research & Analysis UK 2012*

Report Sample

**Figures in Charts & Tables Have Been Altered for Sample Purposes &
Do Not Reflect The Actual Market Data Provided in the Full Report**

**Domestic Garden Products Market Size & Review 2006-2012; SWOT & PEST
Analysis, Product Mix 2006-2016; Channel Mix 2006-2016; Manufacturers
Profiles, Garden Centres Profiles & Key Financials; Market Forecasts to 2016**

June 2012

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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.

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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; 4 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 products market between 2006 and 2012 and forecasts to 2016. 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, 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 some £xx billion at retail selling prices in 2012, with the market having experienced xxxxxxxxxxx xxxxxxx xxxxxxxxxxx xxxxxxx in recent years, despite a number of xxxxxxxxxxx xxxxxxx key market influences. Forecasts are moderately xxxxxxxxxxx xxxxxxx for the market overall in the near to medium term as a number of xxxxxxxxxxx xxxxxxx are set to xxxxxxxxxxx xxxxxxx in a number of key product sectors. In 2011 and 2012, sales growth was xxxxxxx somewhat by the xxxxxxx xxxxxxx in 2012, xxxxxxx xxxxxxx, a xxxxxxx xxxxxxx, xxxxxxx, low xxxxxxx activity, Government xxxxxxx xxxxxxx and ongoing xxxxxxx in the xxxxxxx impacting xxxxxxx.

The research methodology for this report includes both primary and secondary research from a wide range of sources. Primary data sources include 4 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 15 years.

During 2010 there were some signs that the economy was xxxxxxxx xxxxxxxx as xxxxxxxx to some extent, xxxxxxxx declined, xxxxxxxx xxxxxxxx and retail sales xxxxxxxx. The UK garden products market xxxxxxxx some x% at retail selling prices, leading to xxxxxxxx xxxxxxxx forecasts of a xxxxxxxx xxxxxxxx xxxxxxxx xxxxxxxx for the industry. However, this xxxxxxxx xxxxxxxx was somewhat xxxxxxxx xxxxxxxx xxxxxxxx xxxxxxxx during 2011 as a number of xxxxxxxx xxxxxxxx xxxxxxxx xxxxxxxx xxxxxxxx xxxxxxxx xxxxxxxx xxxxxxxx on garden product sales.

In 2011 sales across most sectors of the garden products market are indicated to have experienced a xxxxxxxx xxxxxxxx xxxxxxxx x% as the xxxxxxxx xxxxxxxx xxxxxxxx xxxxxxxx emerged due to xxxxxxxx xxxxxxxx xxxxxxxx xxxxxxxx, particularly in the xxxxxxxx xxxxxxxx xxxxxxxx xxxxxxxx xxxxxxxx xxxxxxxx. This was also accompanied by the growing xxxxxxxx xxxxxxxx xxxxxxxx xxxxxxxx, with xxxxxxxx xxxxxxxx xxxxxxxx xxxxxxxx beginning to impact the xxxxxxxx xxxxxxxx, xxxxxxxx both consumer and business confidence. In the last quarter of 2011 consumer confidence xxxxxxxx in line with xxxxxxxx output with a further xxxxxxxx in manufacturing and xxxxxxxx xxxxxxxx experienced in Q1 2012 leading to the xxxxxxxx xxxxxxxx xxxxxxxx.

However the consensus of opinion is that the 2012 xxxxxxxx is likely to xxxxxxxx xxxxxxxx xxxxxxxx xxxxxxxx with most sources anticipating xxxxxxxx xxxxxxxx xxxxxxxx in H2 2012. As the xxxxxxxx xxxxxxxx xxxxxxxx this should translate into xxxxxxxx xxxxxxxx xxxxxxxx, further stimulated by xxxxxxxx xxxxxxxx. However, with the xxxxxxxx indicated to be only xxxxxxxx xxxxxxxx xxxxxxxx xxxxxxxx xxxxxxxx xxxxxxxx xxxxxxxx xxxxxxxx having xxxxxxxx by less than 2% thus far in mid 2012, prospects for xxxxxxxx are xxxxxxxx xxxxxxxx xxxxxxxx.

In addition, xxxxxxxx conditions have a significant influence on the UK garden products market, with xxxxxxxx xxxxxxxx during the main consumer purchasing season in April, May & June 2012 likely to xxxxxxxx xxxxxxxx xxxxxxxx overall sales figures for the year. As such our forecasts for 2012 are for xxxxxxxx xxxxxxxx just below xxxxxxxx levels at around x%, reflecting xxxxxxxx xxxxxxxx performance against a backdrop of xxxxxxxx xxxxxxxx xxxxxxxx xxxxxxxx xxxxxxxx xxxxxxxx conditions.

Due to the high level of xxxxxxxx xxxxxxxx at present, value growth in the market in the medium term is expected to xxxxxxxx xxxxxxxx xxxxxxxx xxxxxxxx % in current price terms. However, given the xxxxxxxx xxxxxxxx xxxxxxxx xxxxxxxx market, this xxxxxxxx translates into a xxxxxxxx xxxxxxxx xxxxxxxx £xxx million in 2013 alone. Longer-term prospects for the market xxxxxxxx xxxxxxxx with the overall market set to xxxxxxxx xxxxxxxx xxxxxxxx to £x billion by year-end December 2016, reflecting growth of xx% over a 4 year period.

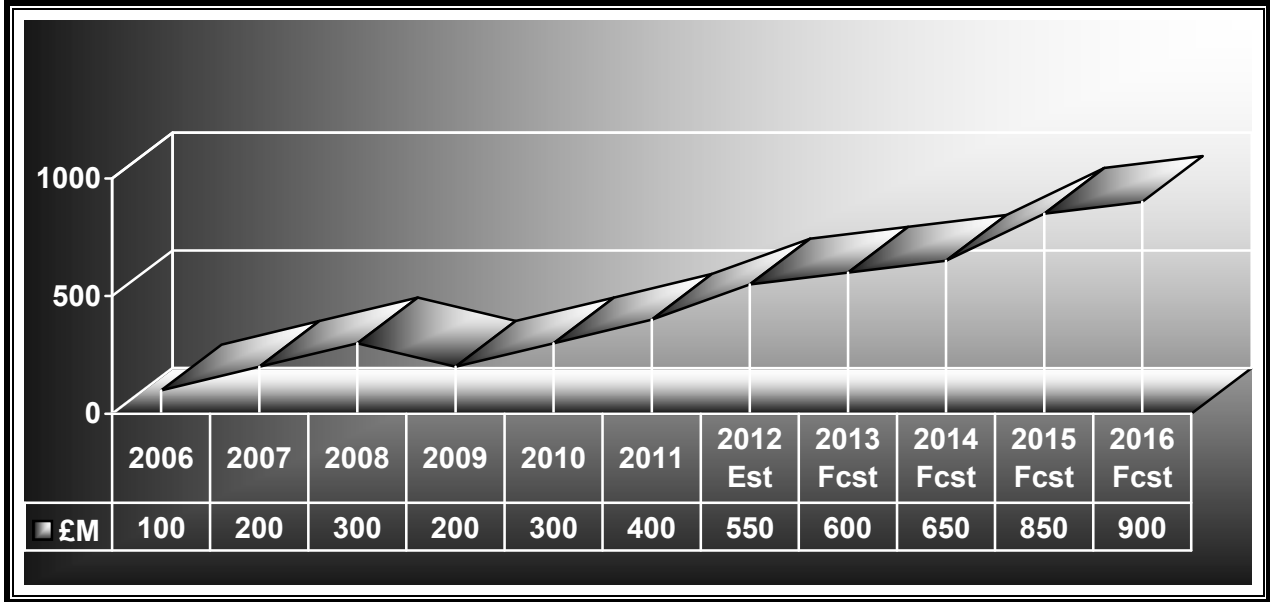
During

2.2 GARDEN PRODUCTS MARKET SIZE & TRENDS 2006-2016

2.2.1 Garden Products Market Size 2006-2016– Current Prices

The UK Garden Products market comprises myriad products and is estimated to be worth around £4.3 billion in 2012 as illustrated in the following chart:-

Figure 1: Garden Products Market – UK 2006 – 2016 By Value £m



NB – Figures Changed in Sample. Source: MTW Research / Trade Estimates

Between xxxxx and xxxxx the market was xxxxxx by xxxxx xxxxxx rates in all sectors. A xxxxxx xxxxxx was xxxxxxx in a number of key product sectors, notably xxxxxx, xxxxxxx and xxxxxxx xxxxxx. By mid xxxx, xxxxxx, the xxxxxxx xxxxxxx xxxxxxx and this, coupled with xxxxxxx xxxxxxx resulted in a xxxxxxx in sales, with the market experiencing an annual xxxxxxx of some x%.

Sales of garden products were mostly xxxxxxx during H2 xxxx due to xxxxxxx and increasing xxxxxxx xxxxxxx incomes as a result of xxxxxxx xxxxxxx xxxxxxx levels. This xxxxxxx xxxxxxx in value growth was also xxxxxxx xxxxxxx by xxxxxxx xxxxxxx xxxxxxx on manufactured products such as xxxxxxx xxxxxxx xxxxxxx xxxxxxx xxxxxxx as the price of xxxxxxx xxxxxxx xxxxxxx rose quickly over this period.

Despite a rapid xxxxxxx xxxxxxx xxxxxxx in xxxxxxx xxxxxxx xxxxxxx across many sectors, sales of garden products xxxxxxx by around x% during xxxxxx. xxxxxxx xxxxxxx on garden products did not exhibit the xxxxxxx xxxxxxx of some 10-15% that was xxxxxxx xxxxxxx xxxxxxx xxxxxxx sectors.

In xxxx there were xxxxxxx signs that the xxxxxxx xxxxxxx as the xxxxxxx market stabilised to some extent, xxxxxxx declined, xxxxxxx rose and retail sales xxxxxxx. The UK garden products market xxxxxxx some x% at retail selling prices to an estimated value of £x billion. Some of the xxxxxxx xxxxxxx factors which provided growth for the market in xxx and xxx included:-

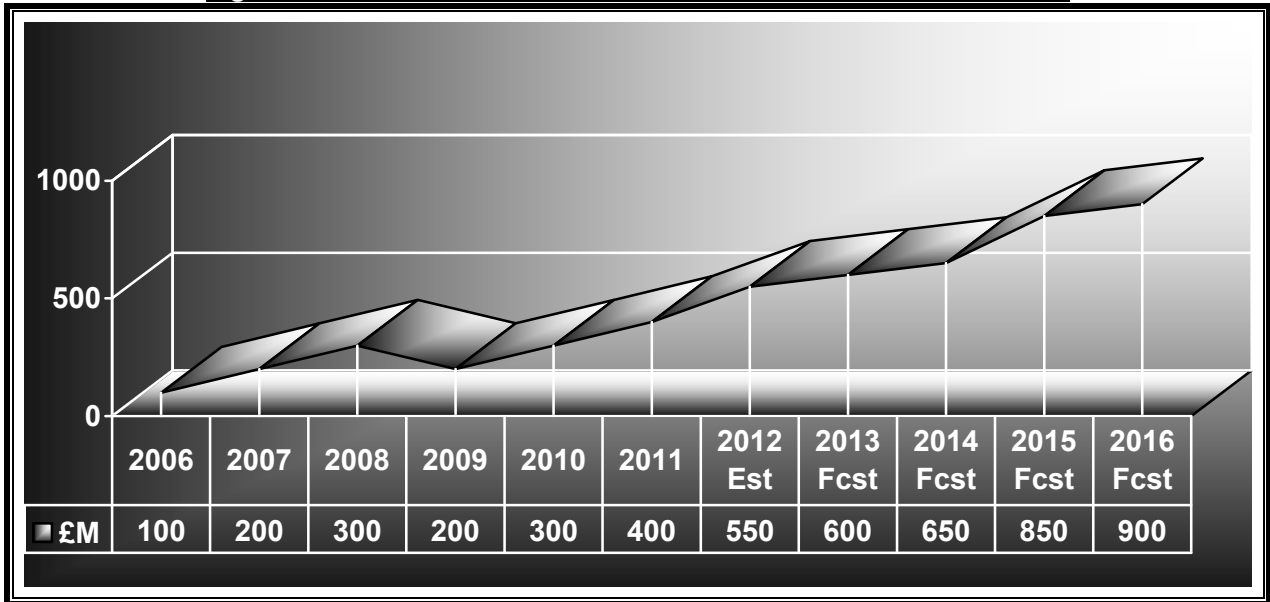
- **Improved xxxxxxxx** – More xxxxxxxx xxxxxxxx xxxxxxxx, resulting in xxxxxxxx xxxxxxxx garden for xxxxxxxx, xxxxxxxx sales of garden furniture, BBQs etc.
- 'xxxxxxx – Following the xxxxxxxx of larger purchases combined with xxxxxxxx xxxxxxxx in xxx and xxx, sources indicate that an element xxxxxxxx xxxxxxxx xxxxxxxx during xxx
- **Minimal Impact of xxxxxxxx** – During xxx, the xxxxxxxx xxxxxxxx xxxxxxxx xxxxxxxx xxxxxxxx xxxxxxxx spending, resulting in reasonably xxxxxxxx xxxxxxxx xxxxxxxx xxxxxxxx xxxxxxxx conditions.
- **Focus on xxxxxxxx** – Manufacturers & distributors were xxxxxxxx to respond to changing market conditions & the demand for products which offered xxxxxxxx xxxxxxxx xxxxxxxx xxxxxxxx xxxxxxxx
- **Low xxxxxxxx Activity** – Prompting some demand for xxxxxxxx xxxxxxxx xxxxxxxx xxxxxxxx xxxxxxxx xxxxxxxx

However, despite xxxxxxxx xxxxxxxx performance in

2.2.2 Garden Products Market Size 2006-2016–Constant Prices

The following chart illustrates the performance of the market value with consumer price index inflation stripped out since 2006, with forecasts to 2016:-

Figure 2: Garden Products Market – UK 2006 – 2016 Constant Prices

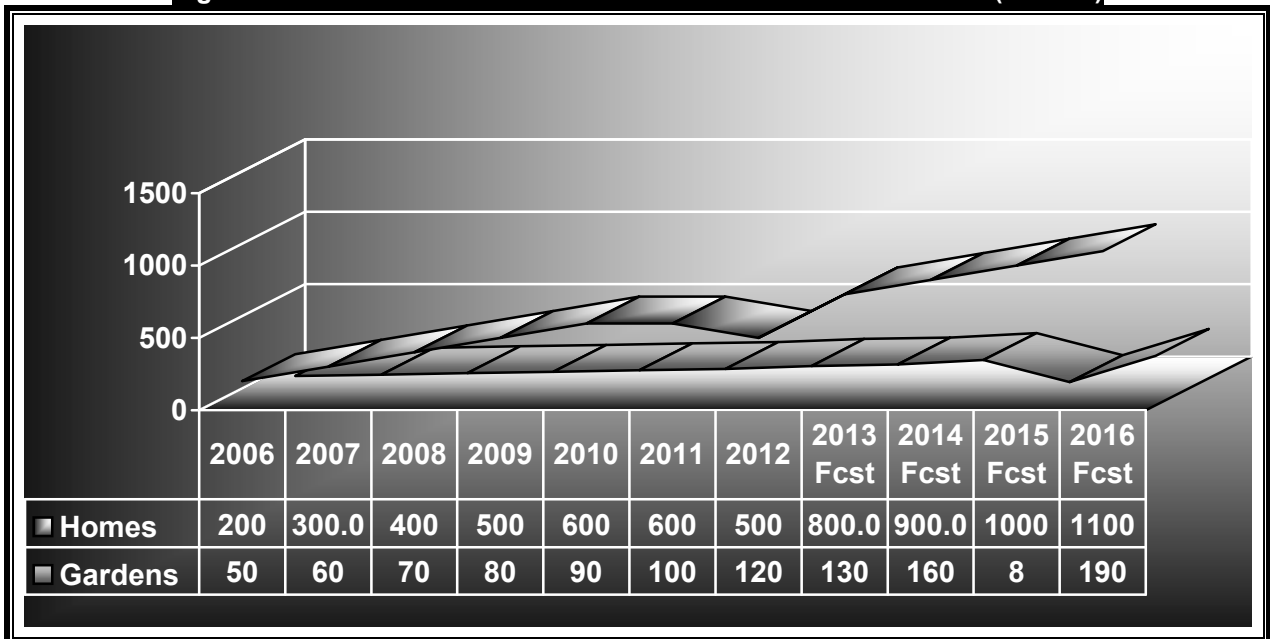


NB Figures Changes in Sample - Source: MTW Research / Trade Estimates

As illustrated, the garden products sector experienced

The following chart illustrates the number of UK homes in the UK compared with the number of private gardens on an annual basis since 2006:-

Figure 3: Number of UK Gardens & Number of Homes 2006-2016 (Millions)



Nb Figures Changed in Sample - Source: MTW Research / Trade Estimates

As illustrated, the number of gardens has

The number of gardens in the UK is expected to

One key issue raised in respect to gardens is

2.2.3 Future Prospects

Given a

Growth rates of

There are a number of positive key market influences which should sustain both value and volume growth in the medium to longer term as both market development and penetration provide underlying stimuli for growth. A number of these longer term positive issues are identified below:-

- **Release of**
- **High Level of**
- **Decline in**
- **Growth in Number of**
- **Product**
- **Market**
- **Changing**
- **Market**
- **Organic**

2012 is estimated to see xxxxx of around x%, around 0.5% xxxx inflation. There are a number of issues that may xxxxxx short term volume and value demand:-

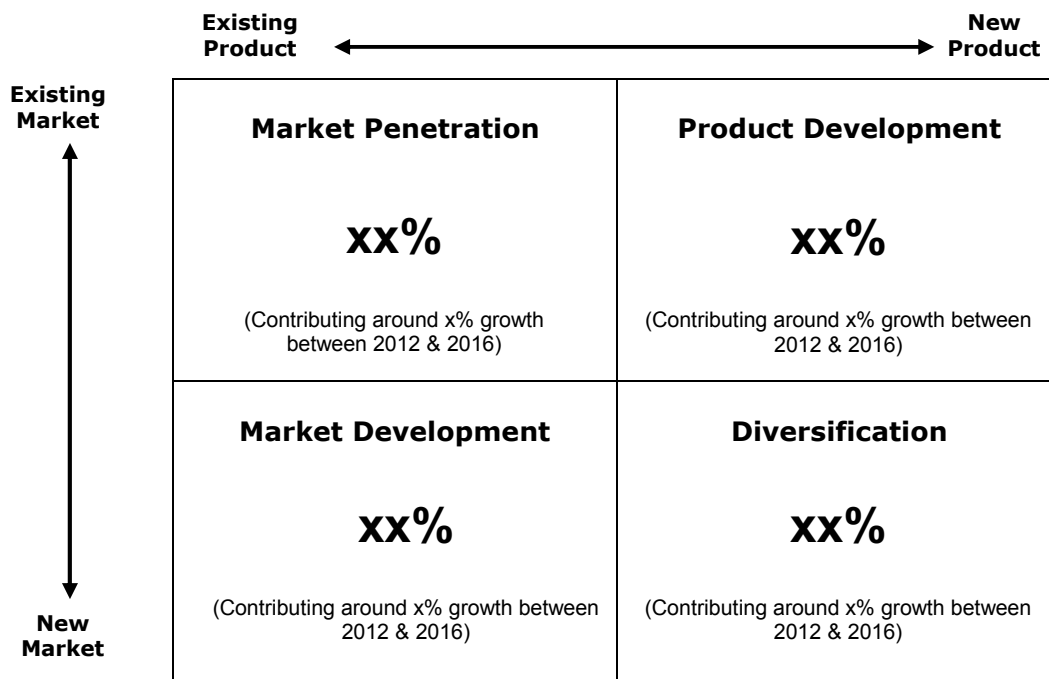
- **Double**
- **Poor**
- **Slow**
- **Growth in.**

- High
- Decline in

Whilst there are a number of issues which may xxxxxxxx value growth in the garden products market, these are considered to be xxxxxxxxx factors and are not expected to xxxxxxxxxxxxxx market for the remainder of 2012 and beyond. As illustrated, there remain a number of key factors which should xxxxxxxxxxxxxxxx volume demand in the medium to longer term, xxxxxxxxxxxxxx becoming an increasing issue in some product sectors.

The following table illustrates our estimates of the share by strategic direction for the anticipated xx% market growth to 2016:-

Figure 4: Garden Products Growth Share by Ansoff Strategy 2012-2016



Source: MTW Research Strategic Review 2012

Market and product development is forecast to

A key strength for the garden products market relates to

Reasonable growth opportunities for garden product manufacturers are likely to be seen in

Diversification is

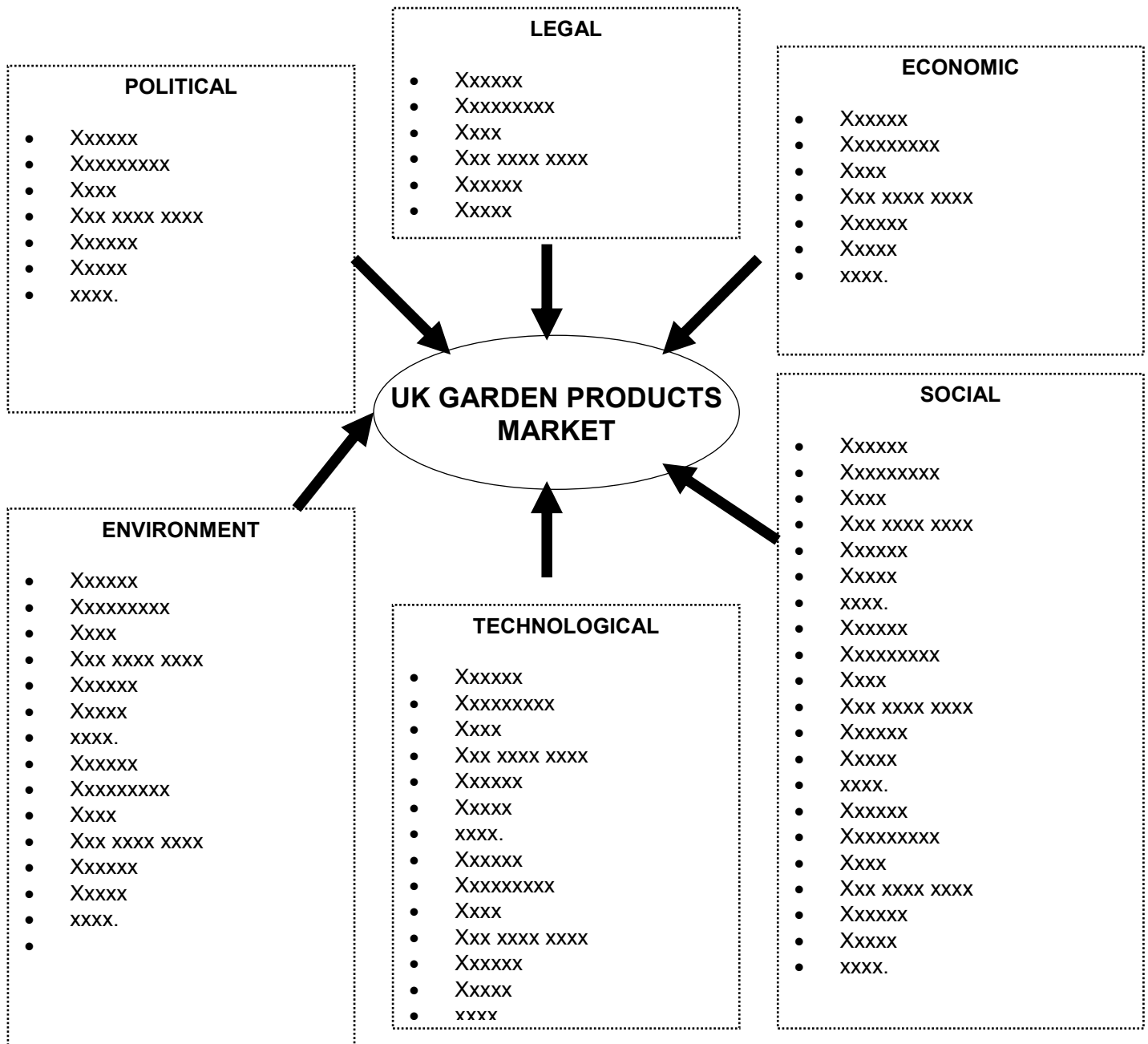
Sources indicate that there are a number of key market opportunities relating to product development which UK suppliers can use to add value to their product portfolio as well as increasing volume demand. These include:-

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 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 growth in the future:-

Figure 5: PEST Analysis for UK Garden Products Market in 2012



Source: MTW Research Strategic Review 2012

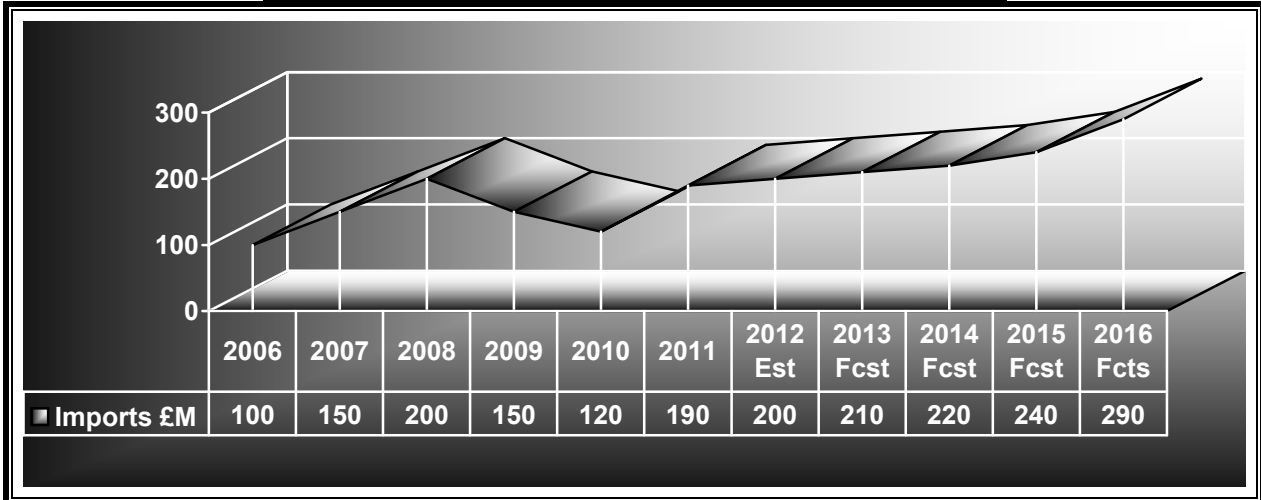
Whilst the above diagram is by no means exhaustive, it provides an illustration of some of the key issues impacting the market at present and in the future.

2.5 IMPORTS & EXPORTS OF GARDEN PRODUCTS 2006-2011

In recent years the UK garden products market has been xxxxxx by a xxxxxxxx xxxxxxxx imports. Trade sources identify xxxxxx xxxxxxxx xxxxxxxxxxxxxxxxxxx xxxxxxxxxxxx xxxxxxxx market sectors in 2012 with this set to continue be a key market characteristic in the medium to longer term.

The following chart illustrates our estimates of the level of imports of all garden products since 2006 and forecasts to 2016 in value terms:-

Figure 15: Imports of Garden Products By Value 2006-2016



NB – Figures Changed in Sample - Source: MTW Research / Trade Estimates

The above figures reflect estimates based on Government information, secondary research and trade input as official data is not collected for all imports of garden products.

As illustrated, total imports of garden products are currently estimated at around £xx billion in 2012. Imports are now estimated to account for some xx% of all UK sales of garden products by value and around xx% by volume.

In

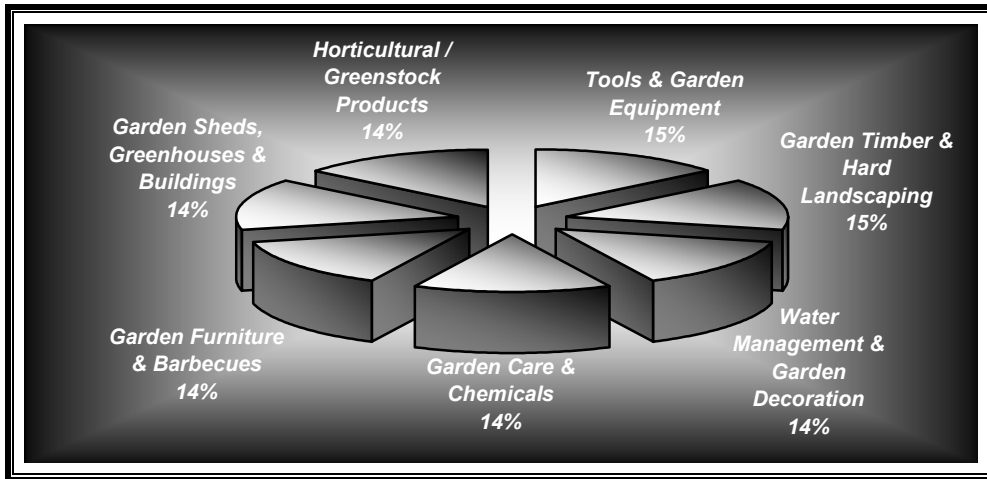
The following chart illustrates the share by key originating countries for garden products imports in 2012:-

3. PRODUCT TRENDS & SHARES

3.1 Share by Key Product Sector – 2012, 2006 & 2016

The share accounted for by each of the key sectors within the UK garden products market in 2012 is illustrated in the following chart:-

Figure 17: Share by Product in Garden Products Market 2012



Nb – Figures Changes in Sample - 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 largest sector of the garden products market is accounted for xxxxxxxx which includes xxxxxxxx, xxxxxxxx, xxxxxxxx and other xxxxxxxx xxxxxxxx designed for domestic garden applications.

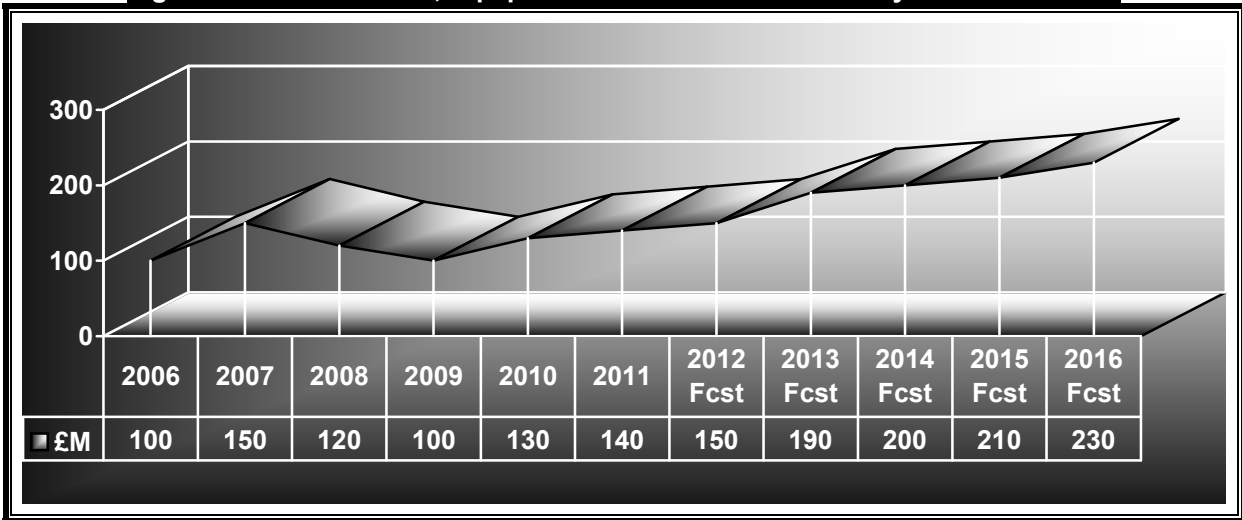
In 2012 this sector represents around x% of the market and is estimated to be worth £xx million, reflecting xxxxxxxx xxxxxxxx performance against a backdrop of xxxxxxxx xxxxxxxx although xxxxxxxx xxxxxxxx xxxxxxxx remains a key issue within the xxxxxxxx value segment of the market.

The second largest sectors of the market are xxxxxxxx xxxxxxxx xxxxxxxx and garden xxxxxxxx xxxxxxxx. The xxxxxxxx xxxxxxxx sector is currently estimated to be worth around £752 million in 2012 accounting for around 17% of the market. This sector has seen reasonable growth recently as the trend towards xxxxxxxx xxxxxxxx xxxxxxxx xxxxxxxx

3.2 Tools, Garden Equipment & Lawnmowers Market 2006-2016

The following chart illustrates the performance of the garden tools, equipment and lawnmower market by value since 2006 and forecasts to 2016:-

Figure 20: Garden Tools, Equipment & Lawnmower Market by Value 2006-2016



Figures Changed in Sample - Source: MTW Research / Trade Estimates

The garden tools, equipment and lawnmowers market is estimated to be worth just over £xxx million in 2012 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, rakes, shears etc
- Lawnmowers – manual, petrol, electric / battery, rotary, hover, cylinder, ride-on.

The overall market experienced

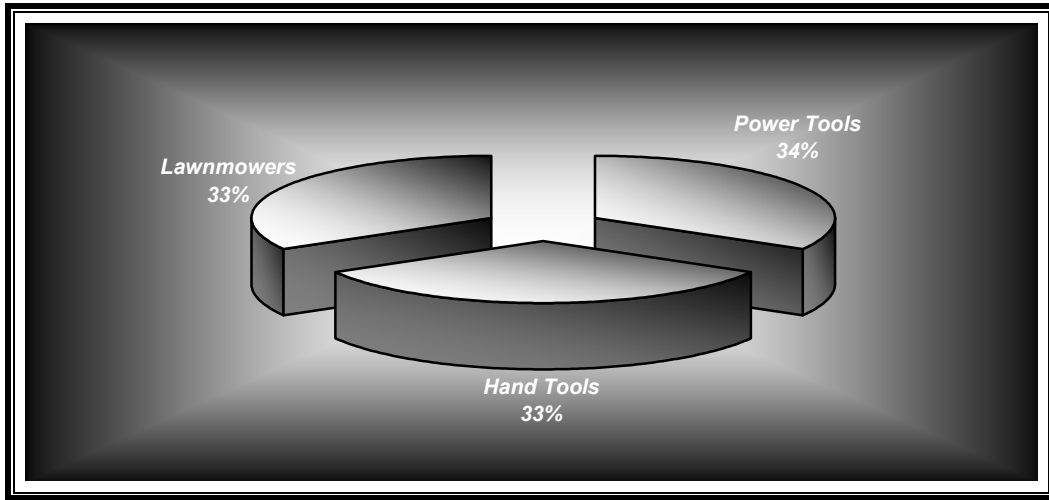
The

According to

Despite

The following chart illustrates the share by key product sector in 2012 by value:-

Figure 21: Garden Tools & Lawnmowers Market – Share by Product 2012



Figures Changed in Sample - Source: MTW Research / Trade Sources

As illustrated, the lawnmowers sector accounts for
Our estimates indicate that the electric rotary lawnmower sector
The latest technological developments in
In 2012 the garden power tools sector has
Whilst the main route to market

3.3 Garden Timber & Hard Landscaping Market 2006 – 2016

The following chart illustrates the performance of the domestic garden timber and hard landscaping market, excluding labour and professionally installed products, by value since 2006 and forecasts to 2016:-

4. GARDEN PRODUCTS MANUFACTURER PROFILES

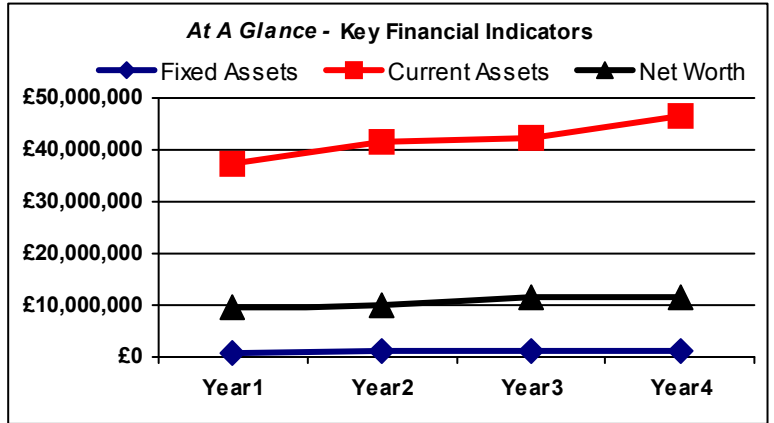
The following section identifies some of the key UK manufacturers & importers active in the UK garden products market and provides a 1 page profile with 4 year key performance indicators for each. It should be noted that whilst we endeavour to include all the major players in the market, inclusion or otherwise in the following section does not necessarily indicate a company's relevance in the market.

4.1 Garden Products Manufacturers Profiles & 4 Year KPIs

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

Sample Address
 Sample Address
 Postcode
 Tel: Sample

Sample Ltd is a private limited with share capital company, incorporated on 01 May 1991. The company's main activities are recorded by Companies House as "Manufacture, marketing and distribution of gardening hardware and birdcare products." In 2012, the company has an estimated 250-300 employees. To year end December 2011, Sample Ltd is estimated to have achieved a turnover of around £75 million. Pre-tax profit for the same period is estimated at around £6.60 million.



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

Company Name	Sample Ltd
Brief Description of Activities	Manufacture, marketing and distribution of gardening hardware and birdcare products.
Parent Company	Sample LIMITED
Ultimate Holding Company	Sample LIMITED
Estimated Number of Employees	250-300
Senior Decision Maker / Director	Richard, Sample

The following table illustrates the company's key performance indicators for the last 4 years:-

Sample Ltd - 4 Year KPIs to Year End 31-Jan-11

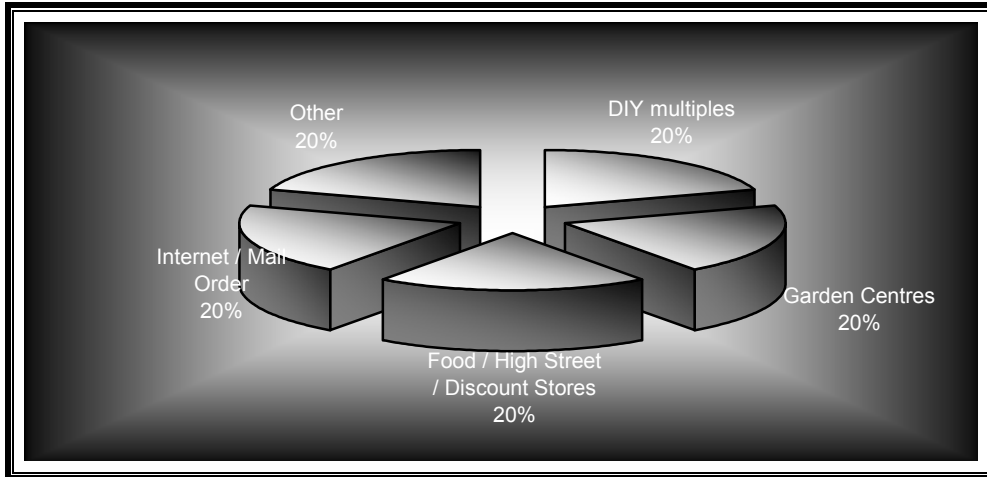
Key Indicator £	Year End 31-Jan-08 (Year1)	Year End 31-Jan-09 (Year2)	Year End 31-Jan-10 (Year3)	Year End 31-Jan-11 (Year4)
Fixed Assets	£917,484	£1,085,575	£1,066,570	£1,125,301
Current Assets	£37,214,434	£41,397,244	£42,152,863	£46,556,066
Current Liabilities	£28,523,910	£32,167,950	£31,709,696	£36,203,921
Long Term Liabilities	£149,449	£129,653	£25,578	£0
Net Worth	£9,458,559	£10,185,216	£11,484,159	£11,477,446
Working Capital	£8,690,524	£9,229,294	£10,443,167	£10,352,145
Profit per Employee	£35,771	£34,948	£37,299	£26,104
Sales per Employee	£248,760	£261,877	£299,375	£303,071

5. DISTRIBUTION CHANNELS SHARE & TRENDS

5.1 Share by Key Garden Distribution Channel 2012, 2006 & 2016

The share accounted for by each of the key distribution channels within the UK garden products market in 2012 is illustrated in the following chart:-

Figure 132 : Share by Distribution Channel for Garden Products Market 2012



Figures Changed in Sample - Source: MTW Research / Trade Sources

It should be noted

Trade sources indicate that the

The ongoing trend of

Garden centres have

As the DIY multiples have

High street stores, food retailers and discount retailers are

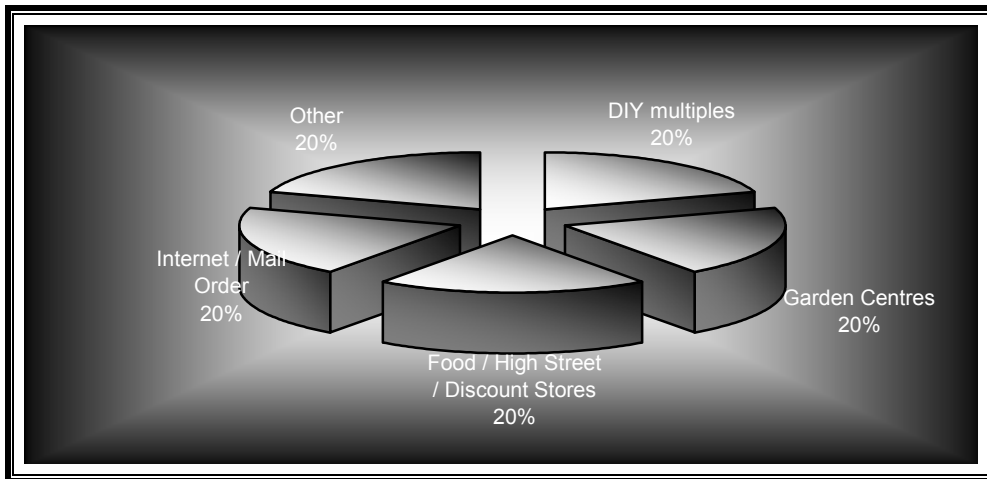
Discount retailers

The Internet

The 'others' channel is currently estimated to account for

In order to provide a historical context, the 2006 share for each of the key channels illustrated in the following chart:-

Figure 133: Share by Distribution Channel for Garden Products Market 2006



Figures Changed in Sample - Source: MTW Research / Trade Sources

As illustrated,

The wide

As a result of

During

Food, high street and discount stores

The recessions in

As the

In terms of future prospects, the following chart illustrates the forecast share for each key channel in 2016:-

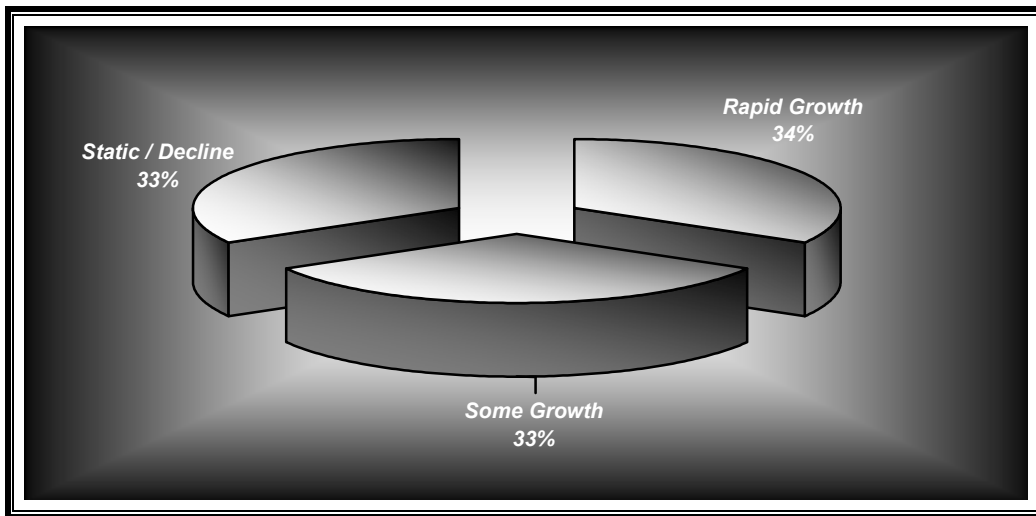
5.2 Garden Centres Market 2012 – Industry Trends

The following section reviews the UK garden centres market in 2012 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 the 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 12 months:-

Figure 135: Market Share by Garden Centres Sales Growth / Decline to June 2012



NB. Figures Changed in Sample - Source: MTW Research / Company Accounts

For the preceding 12 months to June 2012,

However, whilst the above chart illustrates that

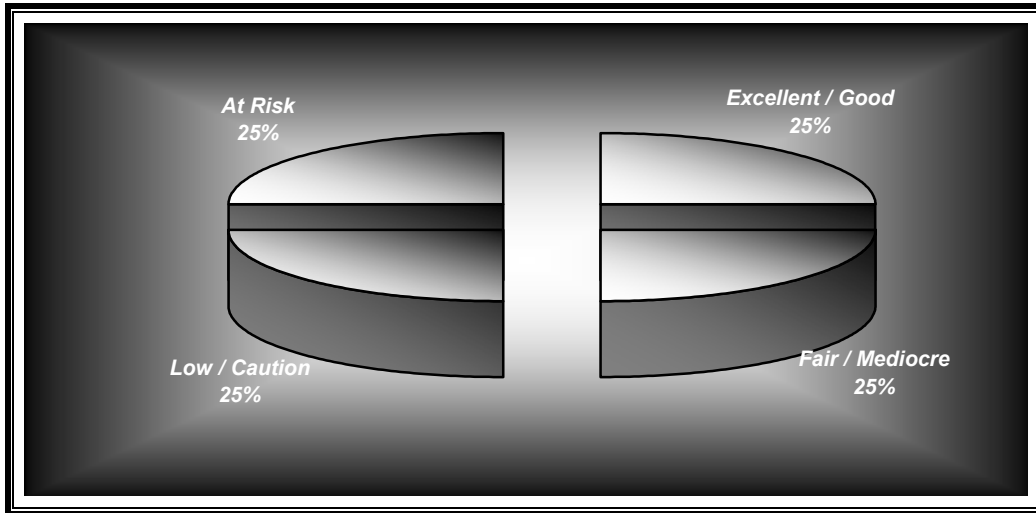
One such issue

Approximately

5.2.2 Industry Share by Credit Rating in 2012

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 June 2012:-

Figure 136: Market Share by Credit Rating in the Garden Centre Market 2012



NB Figures Changed in Sample - Source: MTW Research / Company Accounts

Credit ratings are a crucial indicator of the financial health of a company and when combined, as in the above chart, provide a graphic illustration of the current financial health of the overall garden centres market at present.

As illustrated, just under

xx% of garden centres are now regarded as

However, there

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 June 2012:-

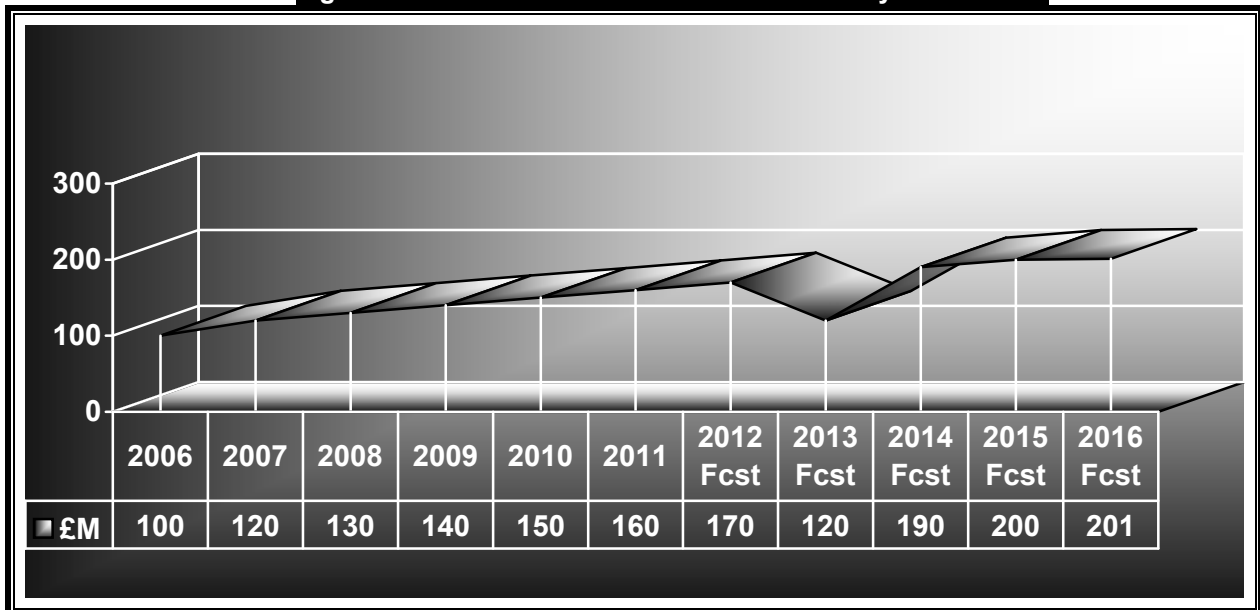
5.3 Key Market Trends in the Garden Centres Industry 2006-2016

The following section reviews some of the key trends in terms of financial performance of the UK garden centres market since 2006, and forecasts to 2016.

5.3.1 Garden Centre Market Profitability 2006-2016

The following table illustrates the performance of the garden centres market in terms of profitability between 2006 and 2012 and provides forecasts to 2016:-

Figure 142: Garden Centres Market Profitability 2006 – 2016



NB Figures Changed in Sample - Source: MTW Research / Trade Estimates

Profitability levels in the garden centres market

During 2012 garden centres continue to

This

By 2016, our forecasts are for profitability

5.3.2 Garden Centres Industry Assets 2006-2016

The following table illustrates the garden centres market in terms of current and fixed assets between 2006 and 2012 and forecasts to 2016:-

5.4 Garden Centres Ranking & Turnover Estimates

5.4.1 Garden Centres Listing

The following section ranks the following key market players active at present:-

Figure 150: Garden Centres Company Listing

Alpha Garden Centre	Greenbrook Garden Centre	Poplars Nursery Garden Centre
Avon Mill Garden Centre	Grosvenor Garden Centre	Pople Garden Centres
Aylett Nurseries,	Haddenham Garden Centre	Porters Horticultural
Azure Garden Centre	Harrington Hall Nursery	Quercus Garden Plants
Badger Nurseries	Haskins Garden Centres	R & T Landscapes
Ballymoney Garden Centre	Haskins Roundstone Garden Centre	R.V.Roger
Beardsworth's	Hayes Gardenworld	Read Garden Centre
Bell Plantation (Garden Centre)	Highway Nurseries	Reuben Shaw & Sons
Blackmore & Langdon	Hillier Nurseries	Root One
Blue Diamond UK	Holme Nurseries	Samuel Jackson Growers
Bourne Valley Garden Centre	Honor & Jeffrey	Scotsdale Nursery And Garden Centre
Bridgford Garden Centre	In-Ex UK	Seymours Gardens
C W Groves & Son	Iver Flowerland	Snowdonia Nurseries
Caerphilly Garden Centre	Jacksdale Garden Centre	Stonepit Nurseries
Capital Gardens	Kings Garden And Leisure	Swanland Nurseries
Charlton Brook	Kitchen Garden Cafe	The Barton Grange Group
Chatsworth Garden Centre	Lanes Landscapes	The Beth Chatto Gardens
Codsall And Wergs Garden Centre	Larch Cottage Nurseries	The Boma Garden Centre
Crown Nursery	Longmate's Nurseries	The Garden And Leisure Group
D.J.Squire & Co.	Mentha Nurseries	The Q Garden Company
Dobbies Garden Centres	Monkton Elm Garden Centre	Thompsons Plant And Garden Centres
Doveleys Garden Centre	Moore's Nurseries & Garden Centre	Tong Garden Centre Plc
Dutch Imports & Daughters	National Polytunnels	Trebaron Garden Centre
E H Williams Gden Centres & Nurseries	Nurseries Direct Garden Centre	Tree World Services
East Studdal Nurseries	Oakington Garden Centre	Twinacre Nurseries
Fakenham Garden Centre	Oaklands Nursery	Valley Grown Nurseries
Fermoys Garden Centre & Farm Shop	Opperman Plants	Van Hage & Company
Ferndale Nursery & Garden Centre	Otter Nurseries	Vistas
Finchley Nurseries	Pantiles Nurseries	Walker Home & Garden Centre
Fosseway Garden Centre	Paramount Plants And Gardens	Webbs Garden Centres
Fromfield Nurseries	Parker's Garden Company Frinton	Whitehall Garden Centre (Holdings)
Fron Goch Garden Centre	Pentland Plants	Woodborough Garden Centre
Frosts Garden Centre	Peter Eastwood Plants	Woodcote Green Nurseries
Garden Centre Group	Planters Garden Centre	Woodthorpe Hall Garden Centres
Gordon Rigg(Nurseries)	Plowmans Gden Nrsery & Plant Ctre	Wych Cross Nurseries
Grasmere Garden Centre	Plymouth Garden Centre	Wyevale Nurseries

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. Whilst we endeavour to include all major players in the market, therefore, the inclusion or otherwise of a company in this report does not necessarily reflect a company's significance in this market.

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 151: Garden Centres Ranked By Turnover 2011

1.	xxxxx xxxx xxxxxxxx	37.	xxxxx xxxx xxxxxxxx	73.	xxxxx xxxx xxxxxxxx
2.	xxxxx xxxx xxxxxxxx	38.	xxxxx xxxx xxxxxxxx	74.	xxxxx xxxx xxxxxxxx
3.	xxxxx xxxx xxxxxxxx	39.	xxxxx xxxx xxxxxxxx	75.	xxxxx xxxx xxxxxxxx
4.	xxxxx xxxx xxxxxxxx	40.	xxxxx xxxx xxxxxxxx	76.	xxxxx xxxx xxxxxxxx
5.	xxxxx xxxx xxxxxxxx	41.	xxxxx xxxx xxxxxxxx	77.	xxxxx xxxx xxxxxxxx
6.	xxxxx xxxx xxxxxxxx	42.	xxxxx xxxx xxxxxxxx	78.	xxxxx xxxx xxxxxxxx
7.	xxxxx xxxx xxxxxxxx	43.	xxxxx xxxx xxxxxxxx	79.	xxxxx xxxx xxxxxxxx
8.	xxxxx xxxx xxxxxxxx	44.	xxxxx xxxx xxxxxxxx	80.	xxxxx xxxx xxxxxxxx
9.	xxxxx xxxx xxxxxxxx	45.	xxxxx xxxx xxxxxxxx	81.	xxxxx xxxx xxxxxxxx
10.	xxxxx xxxx xxxxxxxx	46.	xxxxx xxxx xxxxxxxx	82.	xxxxx xxxx xxxxxxxx
11.	xxxxx xxxx xxxxxxxx	47.	xxxxx xxxx xxxxxxxx	83.	xxxxx xxxx xxxxxxxx
12.	xxxxx xxxx xxxxxxxx	48.	xxxxx xxxx xxxxxxxx	84.	xxxxx xxxx xxxxxxxx
13.	xxxxx xxxx xxxxxxxx	49.	xxxxx xxxx xxxxxxxx	85.	xxxxx xxxx xxxxxxxx
14.	xxxxx xxxx xxxxxxxx	50.	xxxxx xxxx xxxxxxxx	86.	xxxxx xxxx xxxxxxxx
15.	xxxxx xxxx xxxxxxxx	51.	xxxxx xxxx xxxxxxxx	87.	xxxxx xxxx xxxxxxxx
16.	xxxxx xxxx xxxxxxxx	52.	xxxxx xxxx xxxxxxxx	88.	xxxxx xxxx xxxxxxxx
17.	xxxxx xxxx xxxxxxxx	53.	xxxxx xxxx xxxxxxxx	89.	xxxxx xxxx xxxxxxxx
18.	xxxxx xxxx xxxxxxxx	54.	xxxxx xxxx xxxxxxxx	90.	xxxxx xxxx xxxxxxxx
19.	xxxxx xxxx xxxxxxxx	55.	xxxxx xxxx xxxxxxxx	91.	xxxxx xxxx xxxxxxxx
20.	xxxxx xxxx xxxxxxxx	56.	xxxxx xxxx xxxxxxxx	92.	xxxxx xxxx xxxxxxxx
21.	xxxxx xxxx xxxxxxxx	57.	xxxxx xxxx xxxxxxxx	93.	xxxxx xxxx xxxxxxxx
22.	xxxxx xxxx xxxxxxxx	58.	xxxxx xxxx xxxxxxxx	94.	xxxxx xxxx xxxxxxxx
23.	xxxxx xxxx xxxxxxxx	59.	xxxxx xxxx xxxxxxxx	95.	xxxxx xxxx xxxxxxxx
24.	xxxxx xxxx xxxxxxxx	60.	xxxxx xxxx xxxxxxxx	96.	xxxxx xxxx xxxxxxxx
25.	xxxxx xxxx xxxxxxxx	61.	xxxxx xxxx xxxxxxxx	97.	xxxxx xxxx xxxxxxxx
26.	xxxxx xxxx xxxxxxxx	62.	xxxxx xxxx xxxxxxxx	98.	xxxxx xxxx xxxxxxxx
27.	xxxxx xxxx xxxxxxxx	63.	xxxxx xxxx xxxxxxxx	99.	xxxxx xxxx xxxxxxxx
28.	xxxxx xxxx xxxxxxxx	64.	xxxxx xxxx xxxxxxxx	100.	xxxxx xxxx xxxxxxxx
29.	xxxxx xxxx xxxxxxxx	65.	xxxxx xxxx xxxxxxxx	101.	xxxxx xxxx xxxxxxxx
30.	xxxxx xxxx xxxxxxxx	66.	xxxxx xxxx xxxxxxxx	102.	xxxxx xxxx xxxxxxxx
31.	xxxxx xxxx xxxxxxxx	67.	xxxxx xxxx xxxxxxxx	103.	xxxxx xxxx xxxxxxxx
32.	xxxxx xxxx xxxxxxxx	68.	xxxxx xxxx xxxxxxxx	104.	xxxxx xxxx xxxxxxxx
33.	xxxxx xxxx xxxxxxxx	69.	xxxxx xxxx xxxxxxxx	105.	xxxxx xxxx xxxxxxxx
34.	xxxxx xxxx xxxxxxxx	70.	xxxxx xxxx xxxxxxxx	106.	xxxxx xxxx xxxxxxxx
35.	xxxxx xxxx xxxxxxxx	71.	xxxxx xxxx xxxxxxxx	107.	xxxxx xxxx xxxxxxxx
36.	xxxxx xxxx xxxxxxxx	72.	xxxxx xxxx xxxxxxxx	108.	xxxxx xxxx xxxxxxxx

Source: MTW Research / Company Accounts

5.4.3 Garden Centres Turnover Estimates & Ranking

The following table illustrates the estimated turnover for each company for 2011:-

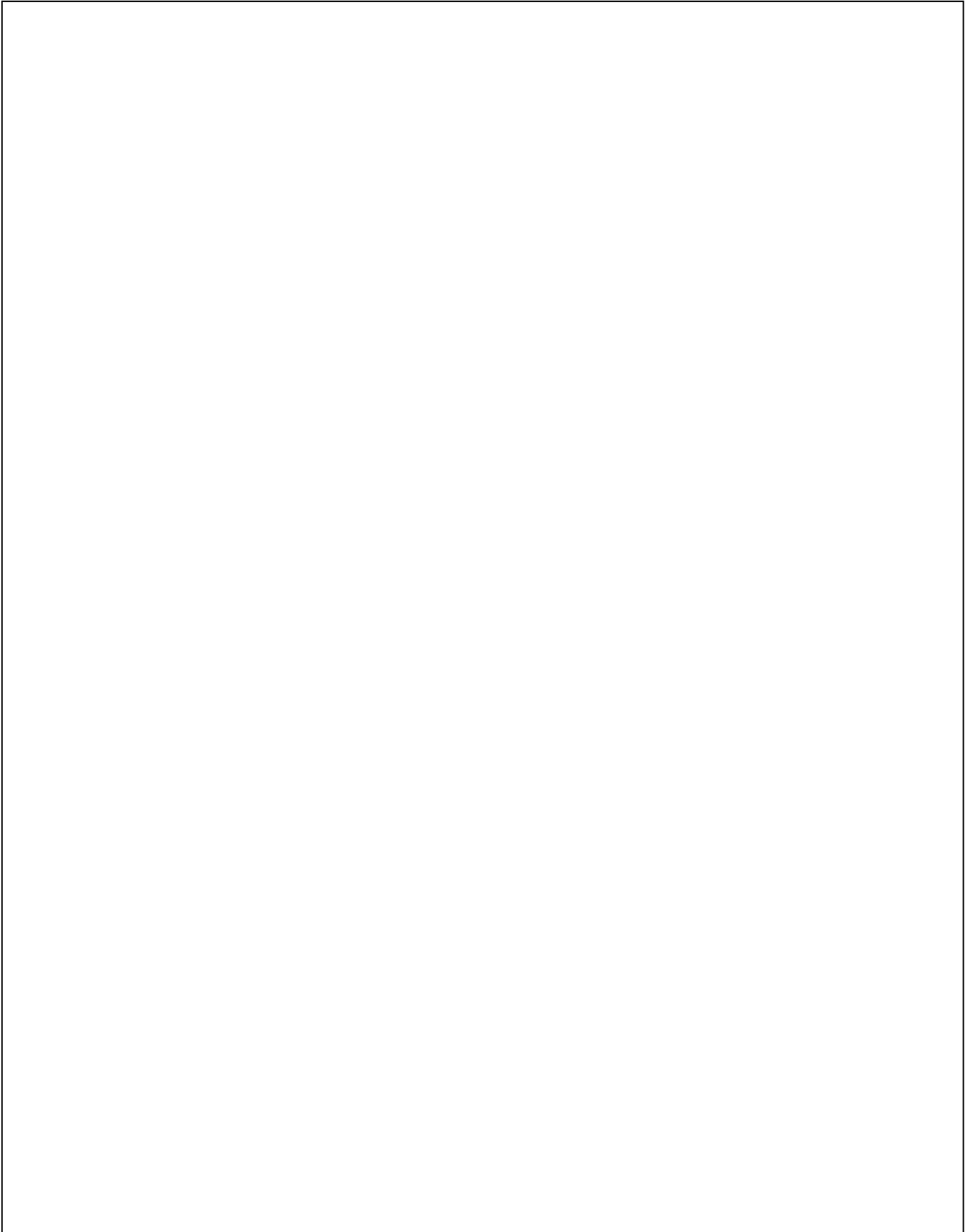
Figure 152: Garden Centres Sales Estimates 2011 £M

Trading Name	2011 turnover £M	Trading Name	2011 turnover £M
Sample Co	£xxx	Sample Co	£2.9
Sample Co	£xxx	Sample Co	£2.7
Sample Co	£xxx	Sample Co	£2.5
Sample Co	£xxx	Sample Co	£2.4
Sample Co	£xxx	Sample Co	£2.4
Sample Co	£xxx	Sample Co	£2.3
Sample Co	£xxx	Sample Co	£2.2
Sample Co	£xxx	Sample Co	£2.1
Sample Co	£xxx	Sample Co	£2.0
Sample Co	£xxx	Sample Co	£2.0
Sample Co	£xxx	Sample Co	£1.9
Sample Co	£xxx	Sample Co	£1.9
Sample Co	£xxx	Sample Co	£1.9
Sample Co	£xxx	Sample Co	£1.9
Sample Co	£xxx	Sample Co	£1.8
Sample Co	£xxx	Sample Co	£1.7
Sample Co	£xxx	Sample Co	£1.6
Sample Co	£xxx	Sample Co	£1.6
Sample Co	£xxx	Sample Co	£1.5
Sample Co	£xxx	Sample Co	£1.5
Sample Co	£xxx	Sample Co	£1.4
Sample Co	£xxx	Sample Co	£1.4
Sample Co	£xxx	Sample Co	£1.3
Sample Co	£xxx	Sample Co	£1.3
Sample Co	£xxx	Sample Co	£1.3
Sample Co	£xxx	Sample Co	£1.3
Sample Co	£xxx	Sample Co	£1.1
Sample Co	£xxx	Sample Co	£1.1
Sample Co	£xxx	Sample Co	£1.1
Sample Co	£xxx	Sample Co	£1.0
Sample Co	£xxx	Sample Co	£1.0
Sample Co	£xxx	Sample Co	£1.0
Sample Co	£xxx	Sample Co	£1.0

5.4.4 Garden Centres Ranking by Profitability

The following table illustrates the profit ranking for each retailer in 2011:-

Figure 153: Garden Centres Ranked By Profit 2011



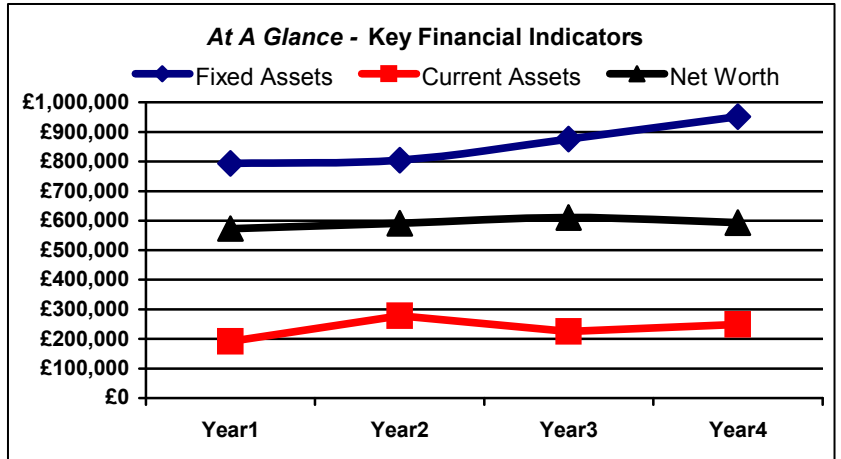
5.5 Garden Centres Profiles, KPIs & ‘At a Glance’

The following section identifies some of the key UK garden centres & nurseries and provides a 1 page profile with an ‘at a glance’ financial health chart with the last 4 years key financials. 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.

Sample Garden Centre Ltd - Company Overview & ‘At a Glance’

Address
 Address
 Address 1
 Devon
 Postcode
 Tel: Sample

Sample Garden Centre Ltd is a private limited with share capital company, incorporated on 10 April 1997. The company’s main activities are recorded by Companies House as “Grow vegetables and nursery products and non-store retail sale”. In 2012, the company has an estimated 10-20 employees. To year end December 2011, Sample Garden Centre Ltd is estimated to have achieved a turnover of around £3million. Pre-tax profit for the same period is estimated at around £0.9 million.



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

Company Name	Sample Garden Centre Ltd
Brief Description of Activities	Grow vegetables and nursery products and non-store retail sale.
Parent Company	-
Ultimate Holding Company	-
Estimated Number of Employees	10-20
Senior Decision Maker / Director	Cheryl, A Sample

The following table illustrates the company’s key performance indicators for the last 4 years:-

Sample Garden Centre Ltd - 4 Year KPIs to Year End 30-Sep-11

Key Indicator £	Year End 30-Sep-08 (Year1)	Year End 30-Sep-09 (Year2)	Year End 30-Sep-10 (Year3)	Year End 30-Sep-11 (Year4)
Fixed Assets	£792,976	£804,039	£876,194	£951,654
Current Assets	£191,863	£277,649	£225,275	£248,173
Current Liabilities	£126,561	£154,940	£131,890	£140,923
Long Term Liabilities	£285,000	£335,584	£359,271	£464,931
Net Worth	£573,278	£591,164	£610,308	£593,973
Working Capital	£65,302	£122,709	£93,385	£107,250
Profit per Employee	£1,500	£1,602	£1708	£1908-
Sales per Employee	£156,987	£167,987	£178,987	£165,423

