

# Gardening in Europe: Emerging Markets and Future Prospects

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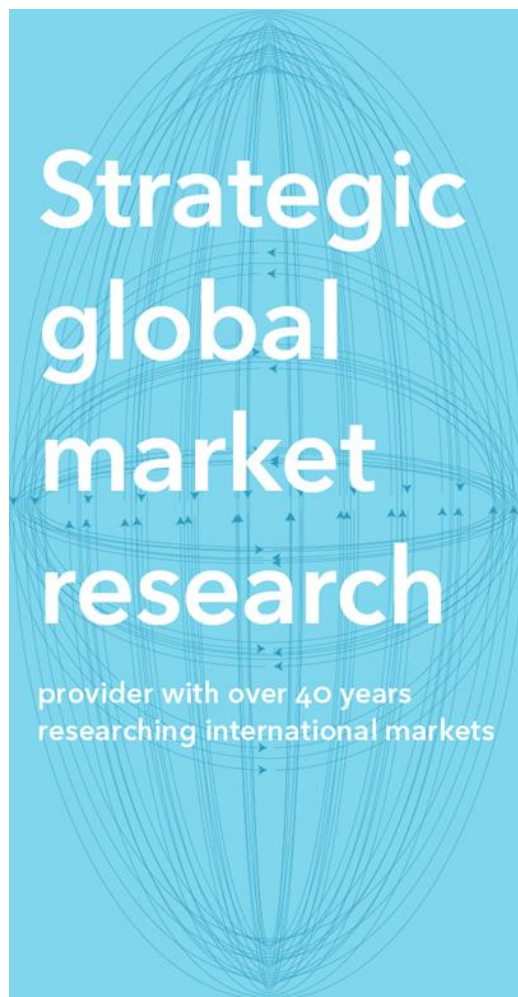
MY PLANT AND GARDEN - Milan, February 2018

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Senior Analyst, Home and Technology

# Who is Euromonitor International

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## OUR SERVICES

Syndicated market research

Consulting

## EXPANSIVE NETWORK

800+ on-the-ground researchers in 80 countries

Complete view of the global marketplace

Cross-comparable data across every market

## OUR EXPERTISE

Consumer trends and lifestyles

Companies and brands

Product categories and distribution channels

Production and supply chains

Economics and forecasting

## Euromonitor International gardening definitions

# Gardening

Garden Care

Garden  
Equipment

Horticulture

Pots and  
Planters

Other  
Gardening

# OVERVIEW

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## PUTTING GARDENING INTO CONTEXT

HISTORIC PERFORMANCE

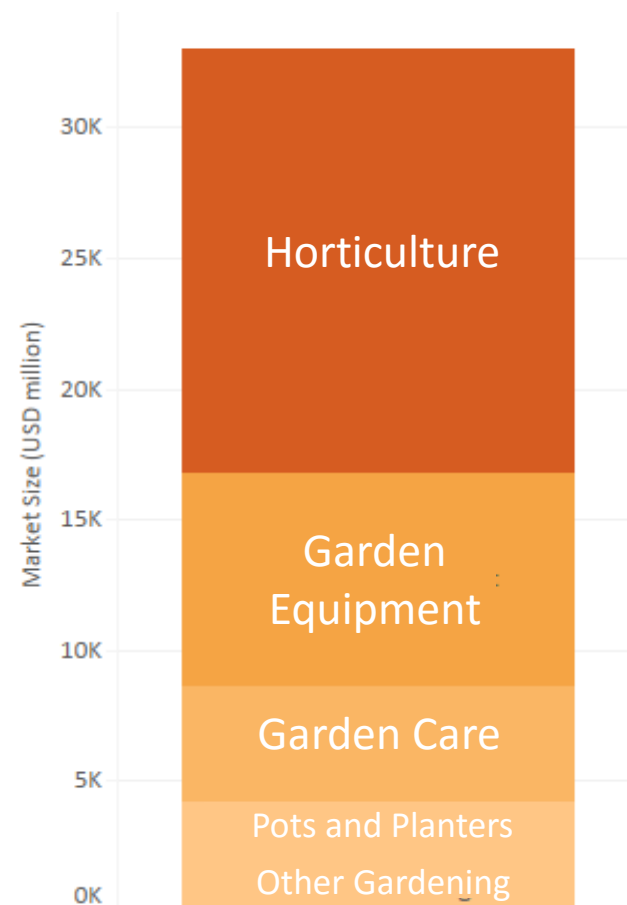
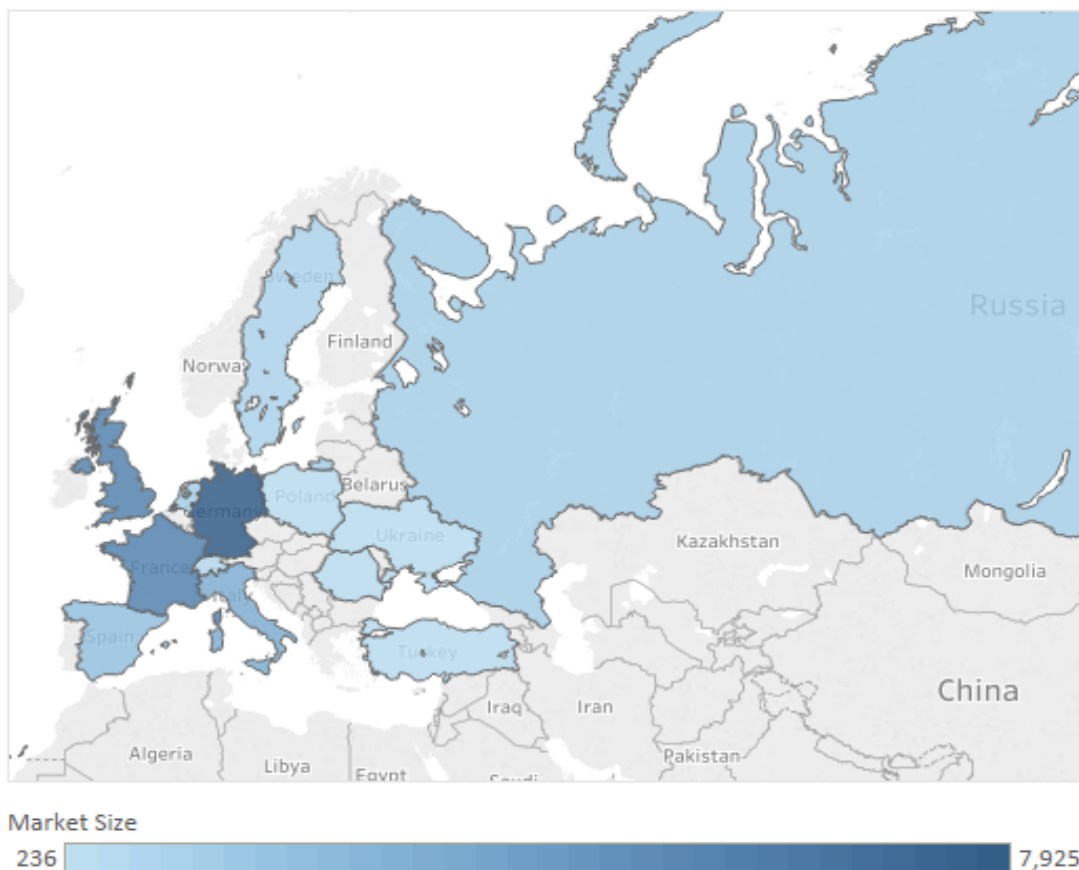
PROSPECTS



# Horticulture and Gardening Equipment account for three-quarters of the European market

## Europe: Gardening Market Size and Category Breakdown, 2016

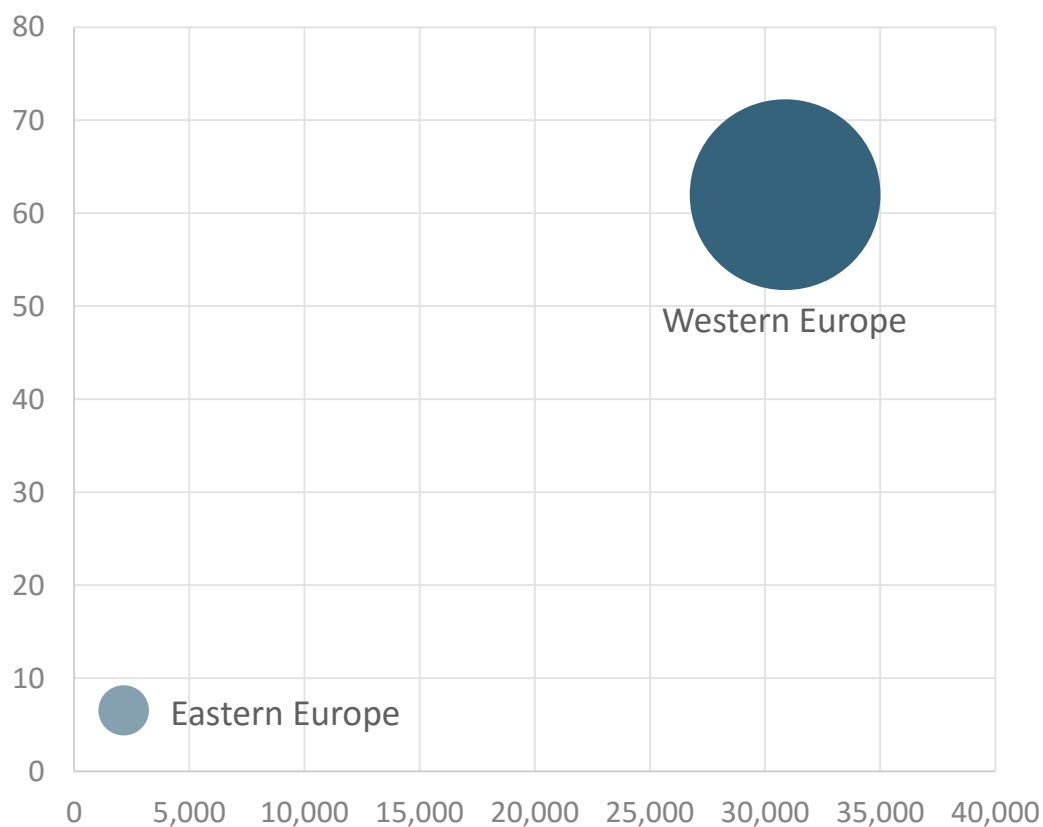
USD million constant value terms



## Eastern Europe shows still unexploited potential

### Gardening: putting Western and Eastern Europe into context, 2016

USD million constant value terms



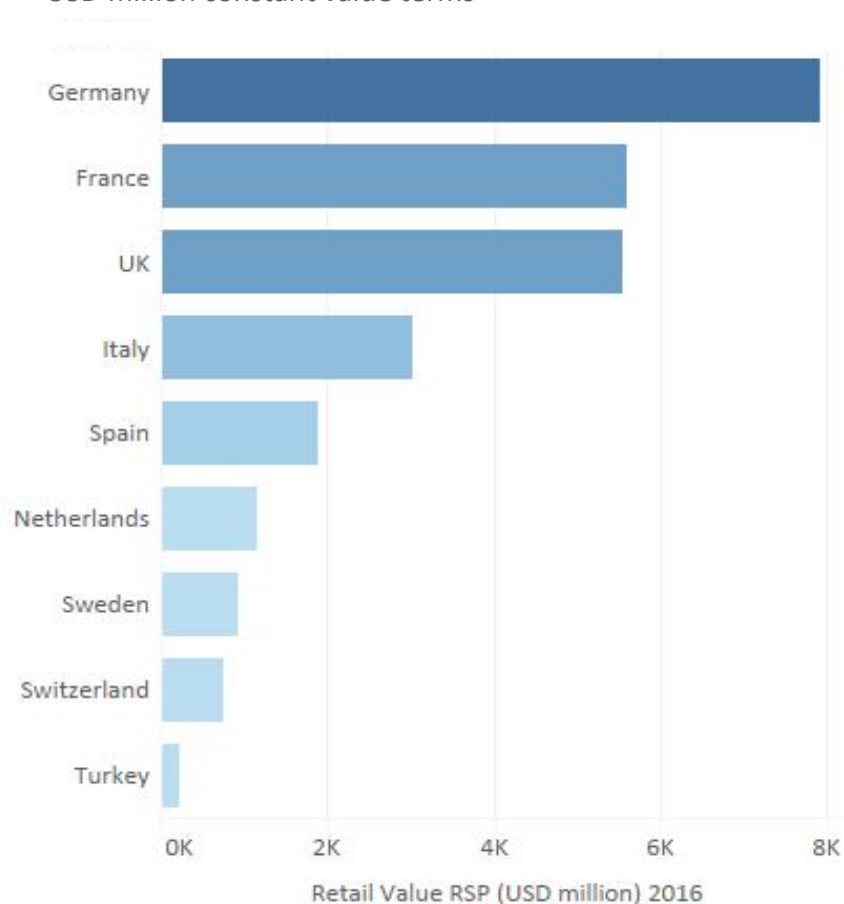
Western Europe accounts for **94%** of the total European gardening market in value terms

In Eastern Europe each person spent on average **USD7.00** on gardening products, versus **USD62.00** in Western Europe 2016

# Western Europe records sluggish growth, driven by equipment

## Western Europe: Breakdown by Countries, 2016

USD million constant value terms

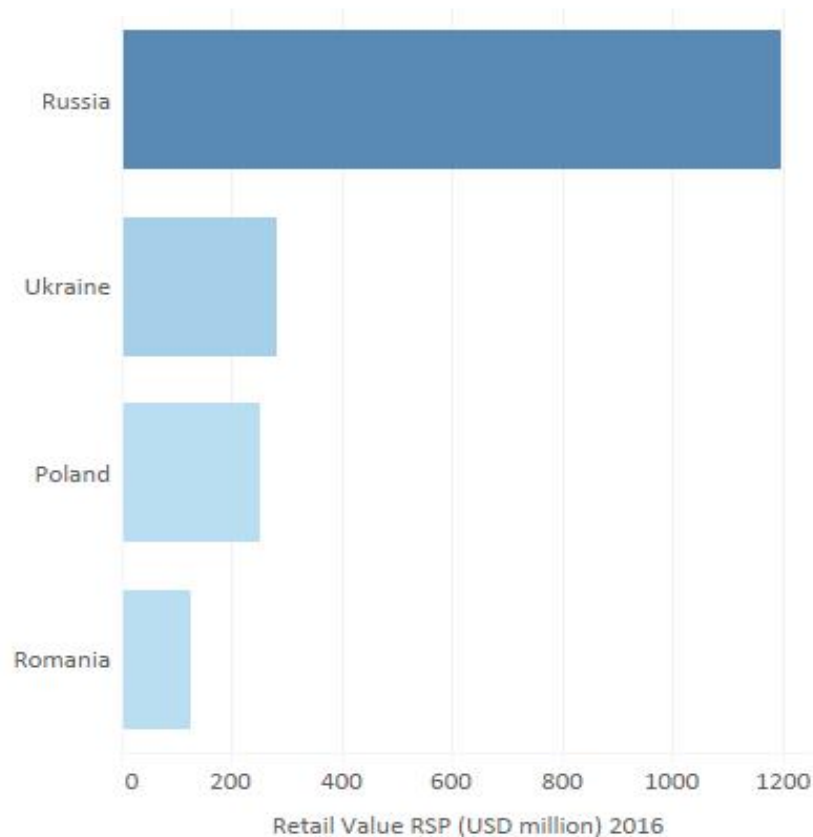




# Small markets help gardening in Eastern Europe to grow

## Eastern Europe: Breakdown by Countries, 2016

USD million constant value terms





# Russia's difficult economic condition negatively affects Eastern Europe

## Europe: Value Growth Rate, 2016

Growth % constant value terms



Western Europe

**+0.9%**



Eastern Europe

**-4.6%**

# OVERVIEW

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PUTTING GARDENING INTO CONTEXT

**HISTORIC PERFORMANCE**

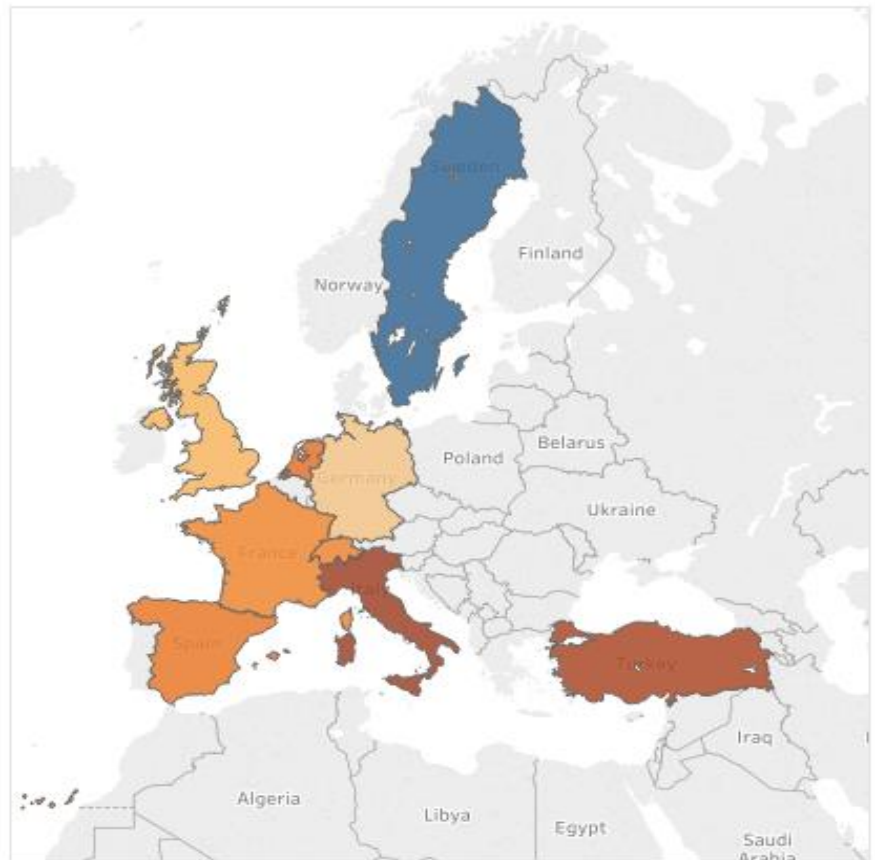
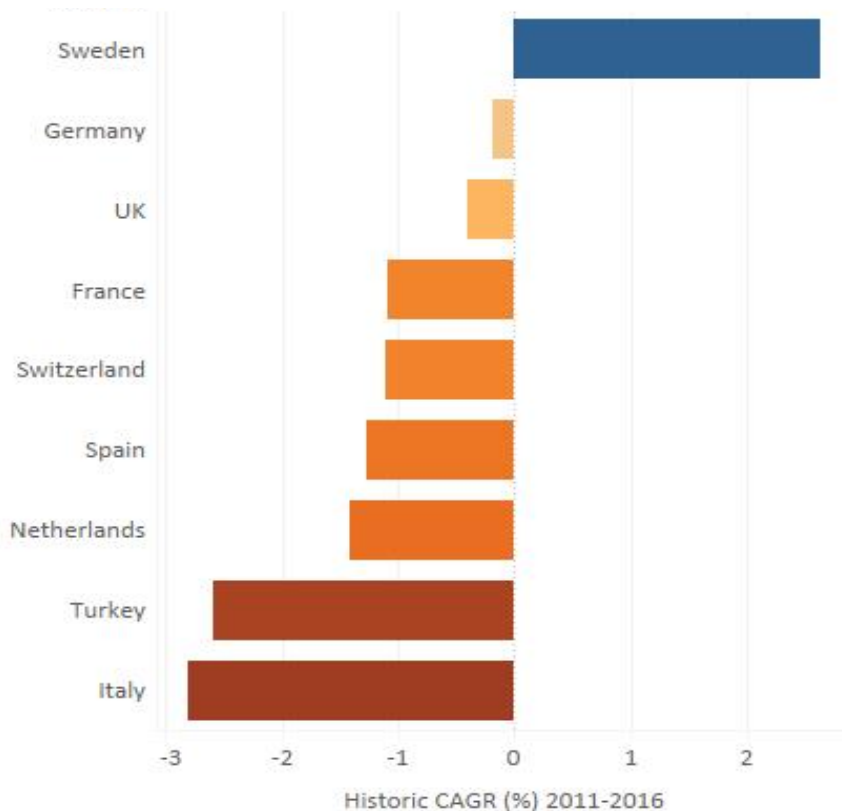
PROSPECTS



## Slow economic recovery along with bad weather conditions adversely impacted the market

### Western Europe: Historic Growth by Country, 2011-2016

Historic CAGR % constant value terms







## Nordic countries buck the trend in recent years

### Nordic Countries: Historic Growth by Country, 2011-2016

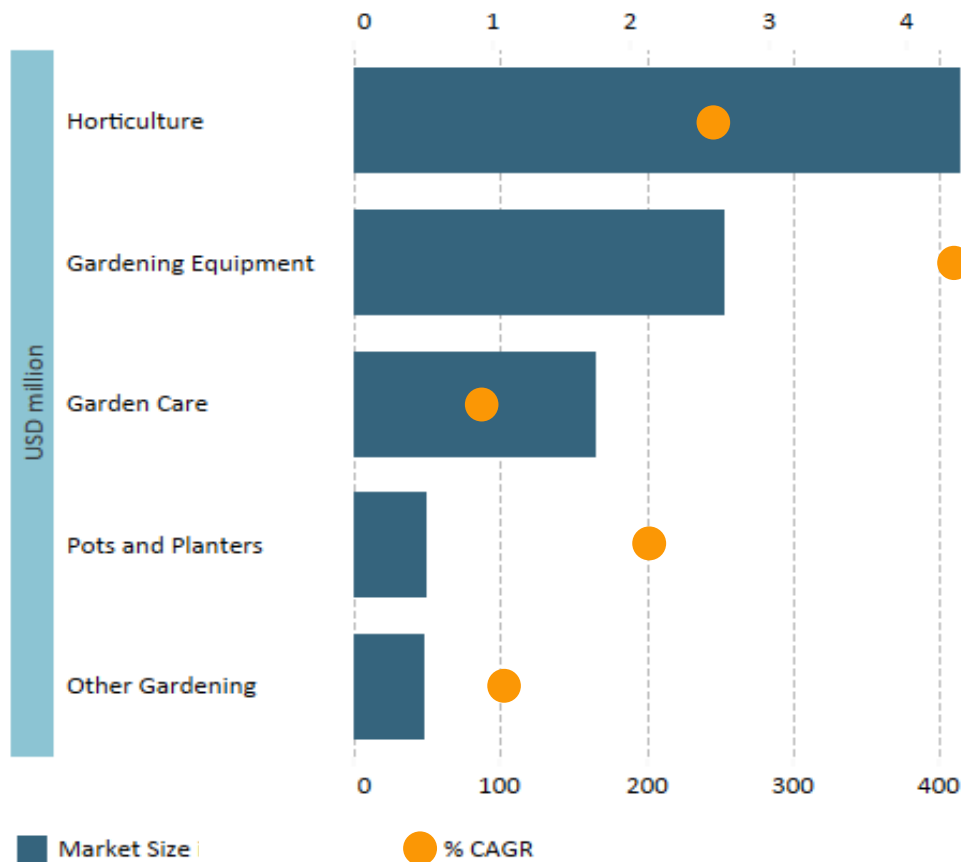
Historic CAGR % constant value terms



	Denmark <b>2.8%</b>
	Sweden <b>2.6%</b>
	Norway <b>2.1%</b>
	Finland <b>0.6%</b>

# Swedes see gardening as a pleasure not a burden

**Sweden: Market Size Category Breakdown, 2016, and Historic Performance, 2011-2016**  
Historic CAGR % constant value terms



LAWN MOWERS  
**+9%**

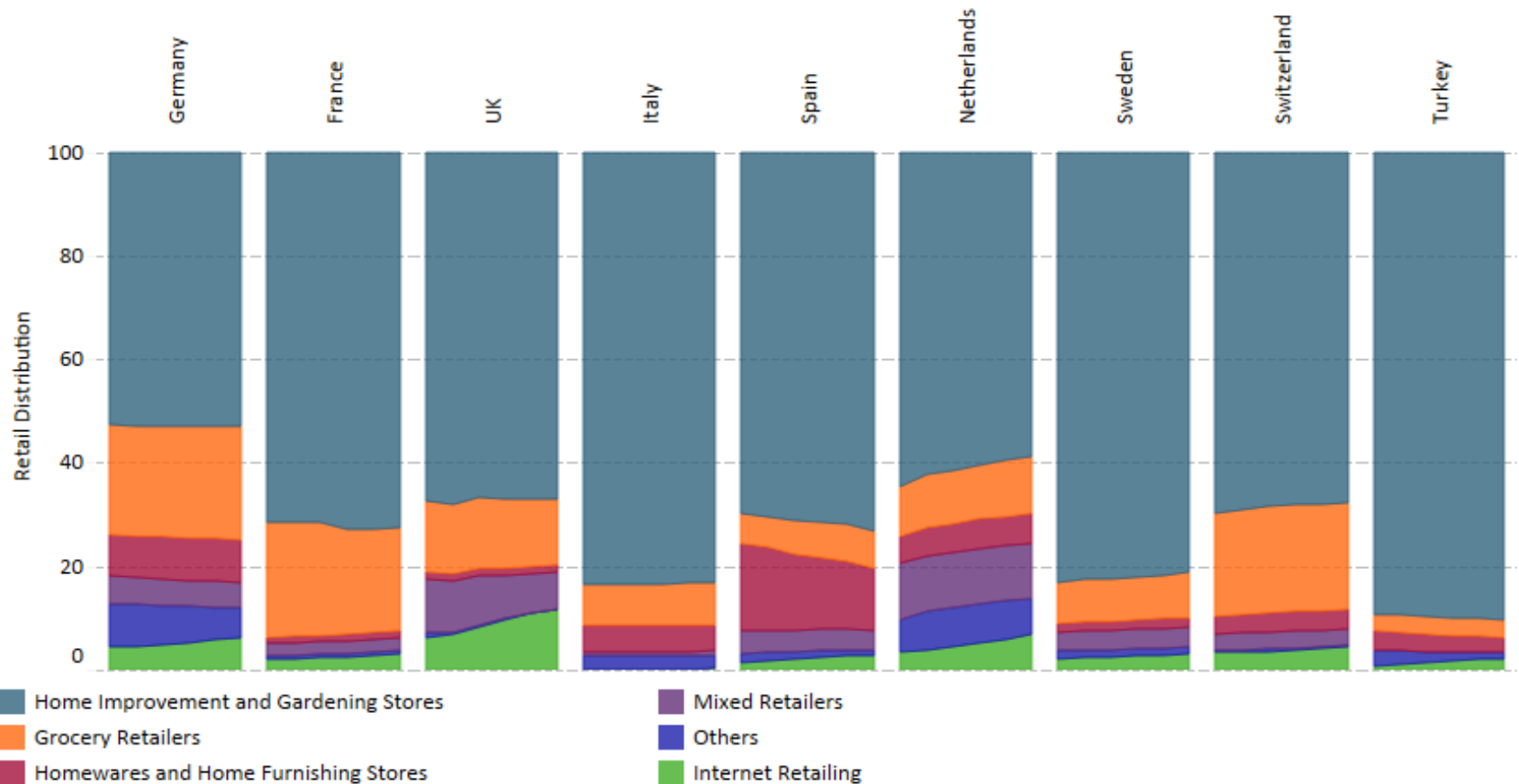


ROBOTIC LAWN MOWERS  
**+42%**

# Discounters try to bring gardening items closer to consumers

## Gardening in Western Europe: Distribution by Channel, 2011-2016

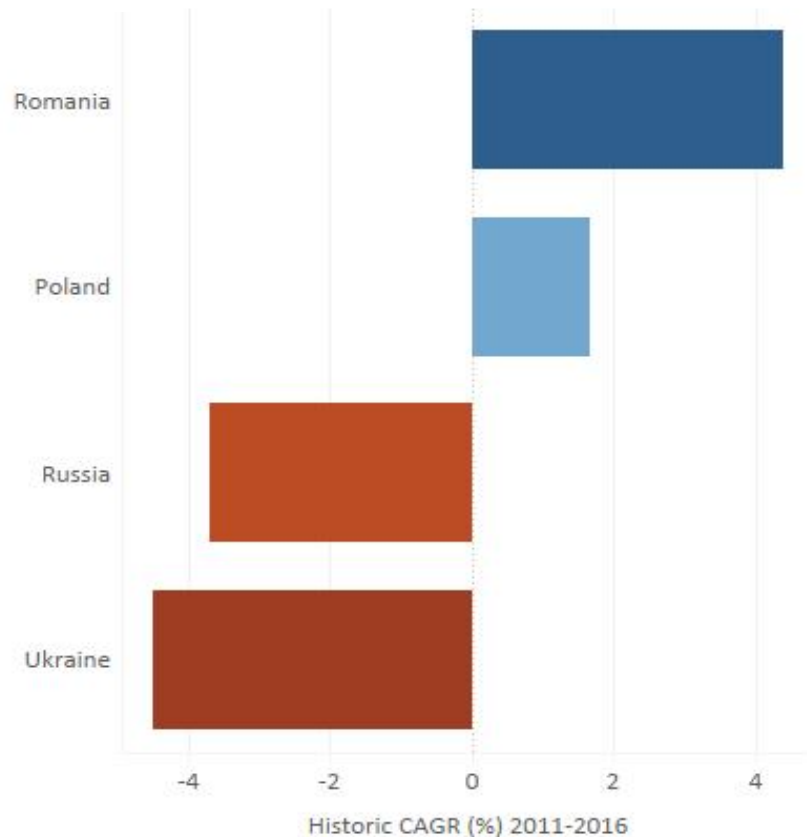
Retail % value share



# Romanians are now buying houses instead of renting

## Eastern Europe: Historic Value Growth by Country, 2011-2016

Historic CAGR % constant value terms

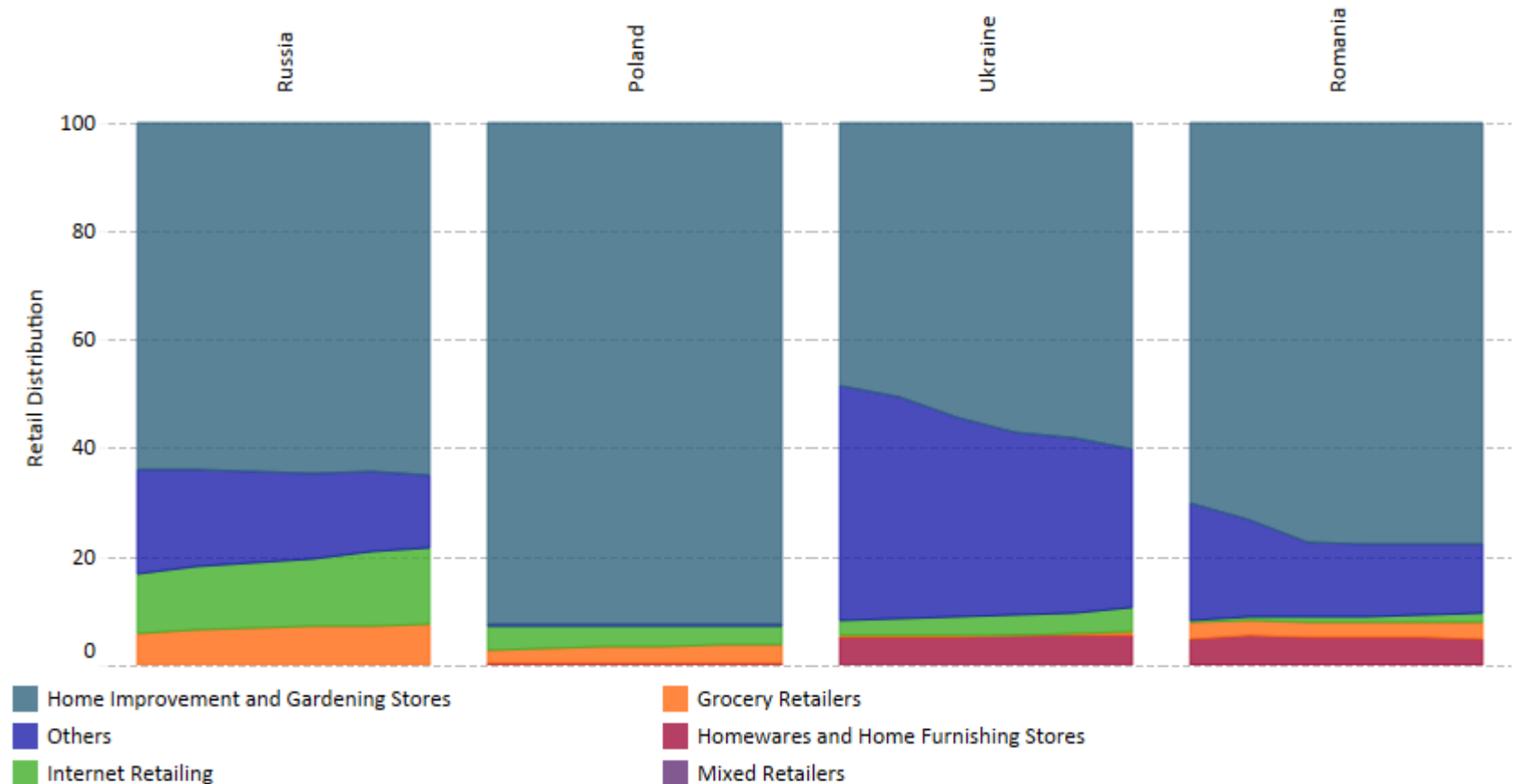




## Home improvement and gardening stores keep consolidating gardening sales

### Gardening in Eastern Europe: Retail Distribution by Channel, 2011-2016

Retail % value share



# OVERVIEW

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PUTTING GARDENING INTO CONTEXT

HISTORIC PERFORMANCE

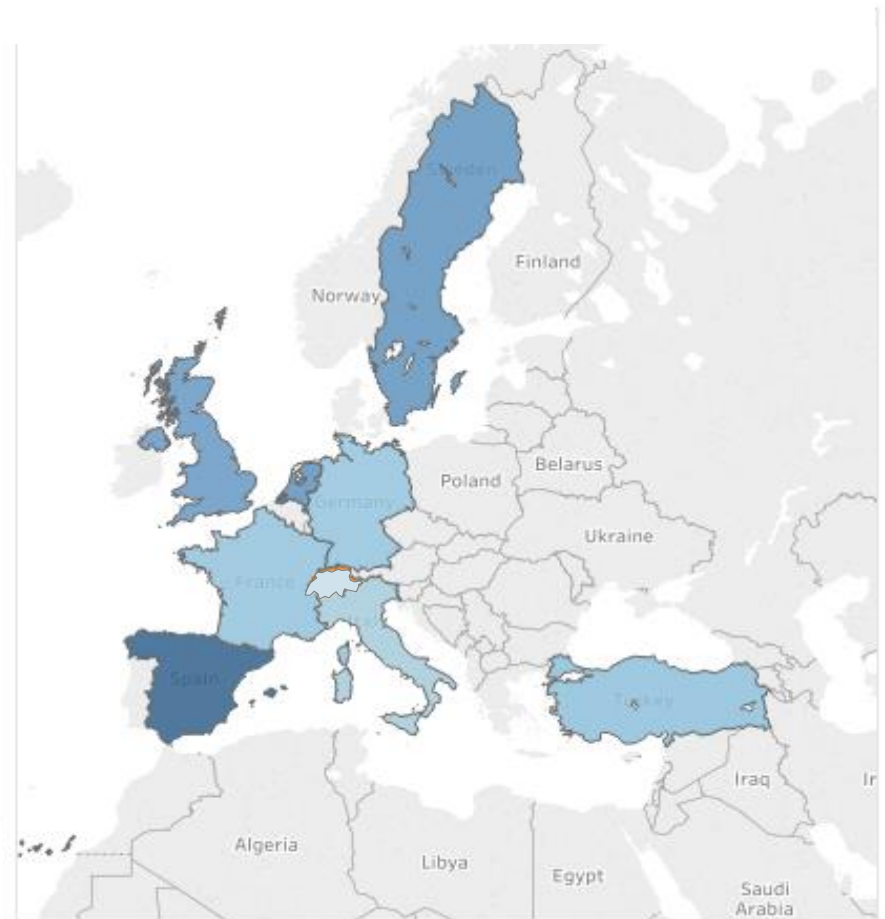
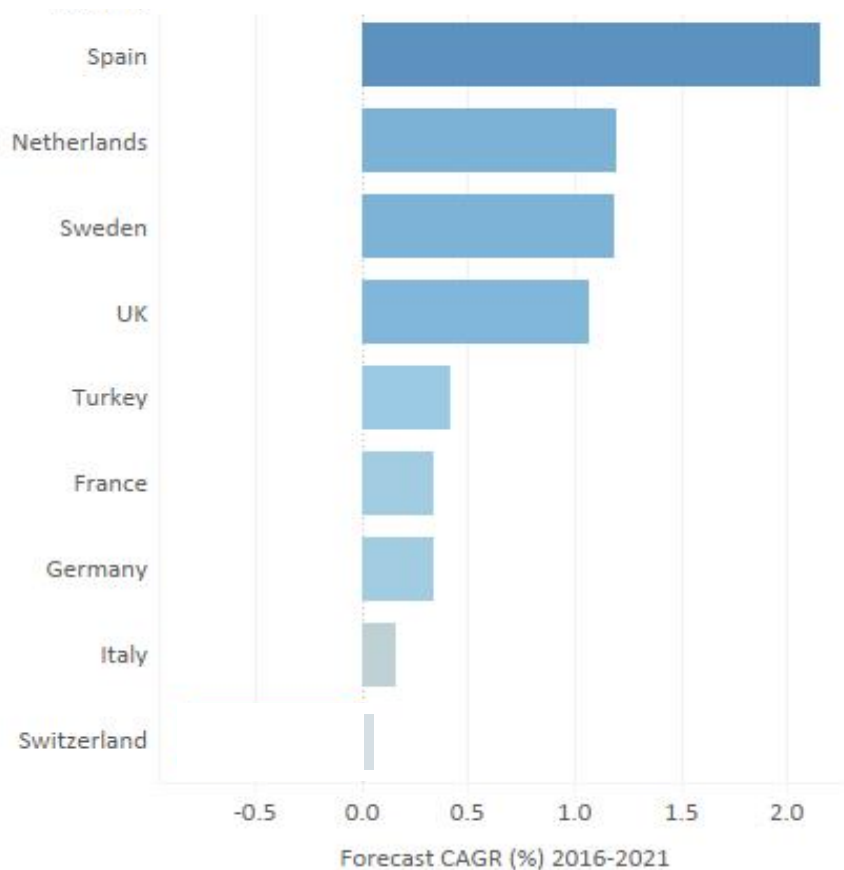
**PROSPECTS**



# Lifestyle trends and smart solutions will help sustain value sales

## Western Europe: Forecast Value Growth by Country, 2016-2021

Forecast CAGR % constant value terms



## Nordic countries will grow the most in Western Europe

### Nordic Countries Forecast Value Growth by Country, 2016-2021

Forecast CAGR % constant value terms



Finland

**2.9%**



Norway

**2.9%**



Denmark

**2.7%**



Sweden

**1.2%**

# Nordic countries are developing a passion for gardening

## Nordic Countries Forecast Value Growth by Country, 2016-2021

Forecast CAGR % constant value terms



Recent  
phenomenon

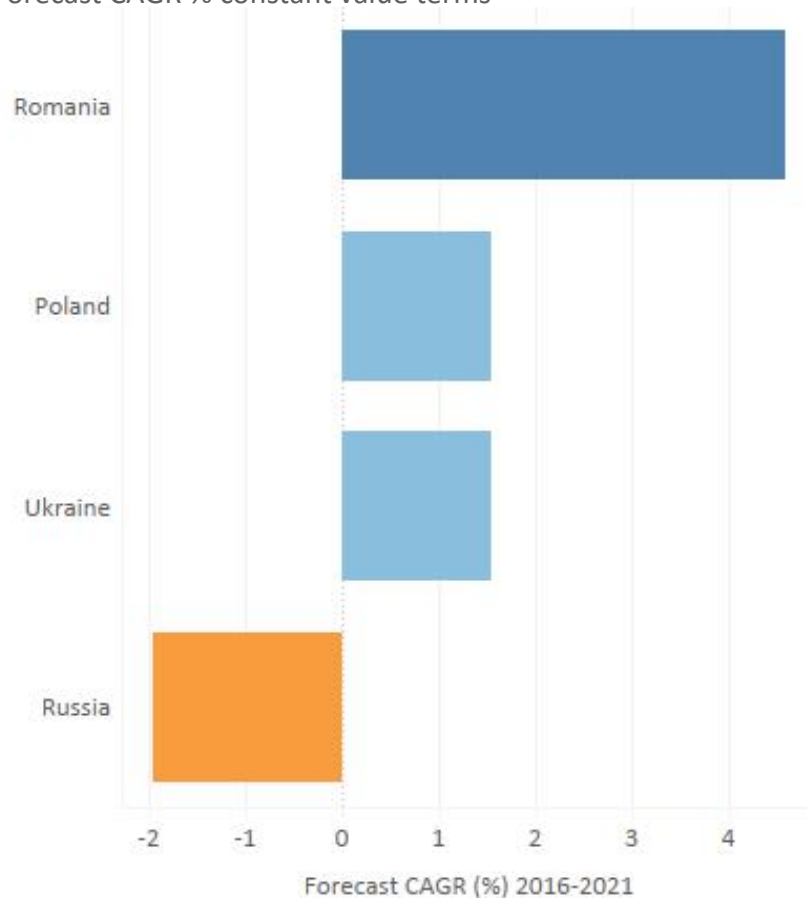
Live outdoors as  
much as possible

Interest in growing  
own food

## Increasing average income of house owners will be the main contributor to growth

### Eastern Europe: Forecast Value Growth by Country, 2016-2021

Forecast CAGR % constant value terms



## Poles and Romanians are moving from apartments to houses



**Romania**

Expansion of specialised chained retailers  
Consumers going towards branded products  
Focus on modern equipment



**Poland**

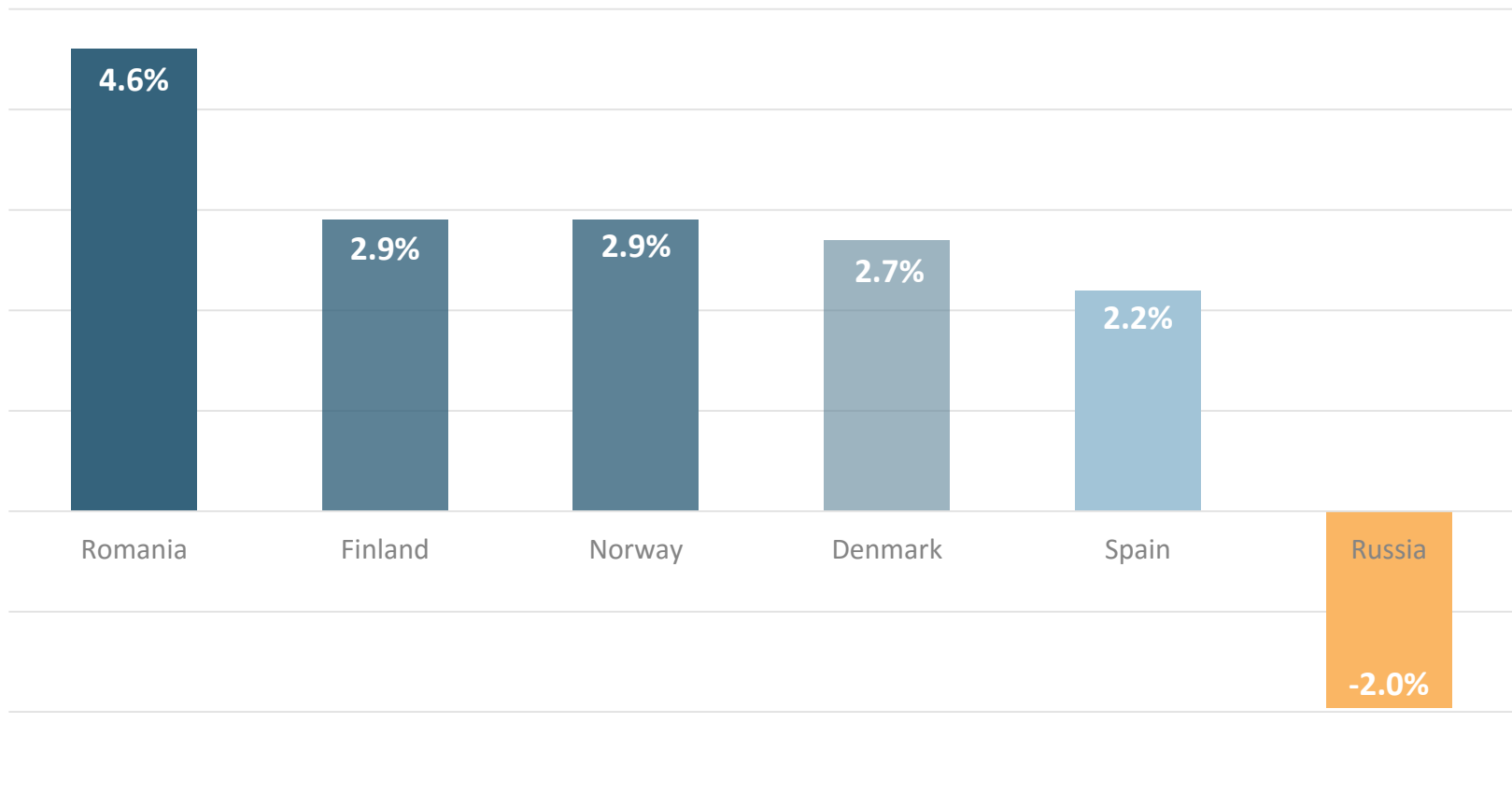
Indoor gardening  
Greater awareness of sustainability and local products, which impacts how people perceive plants and growing them



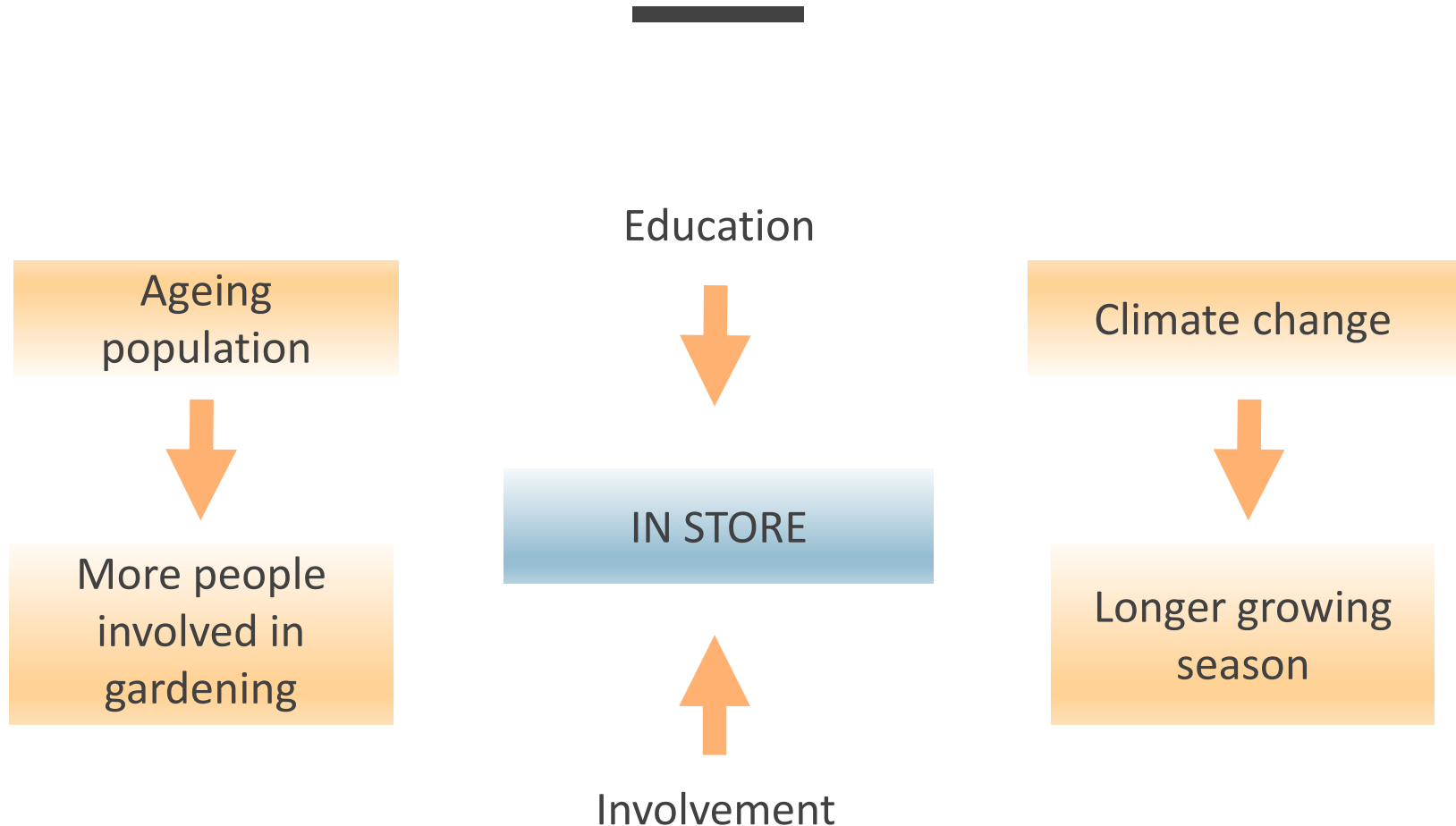
# Interest in growing own vegetables will increase in Nordic Countries

## Europe: Forecast Value Growth by Country, 2016-2021

Forecast CAGR % constant value terms



# Western and Eastern Europe will be affected by the same trends



# Thank you

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