




1

Economic Environment

Weak: South Africa, USA

Status Quo: Australia, France, Ireland, Poland, Spain

Growth: Canada, Denmark, Germany, Japan, Switzerland, UK

The logo for the International Garden Centre Association is located on the right side of the slide. It features the stylized "GIC" letters and the text "INTERNATIONAL GARDEN CENTRE" and "ASSOCIATION" within a circular border, as described in the previous image.

2

Average National Minimum Wage (p/h)

International Average: €9.27

€15.78 Denmark	€9.35 Germany
€12.80 Australia	€8.70 Japan
€12.00 Spain	€8.56 Canada
€10.33 UK	€8.09 USA
€10.25 France	€4.00 Poland
€10.20 Ireland	€1.17 South Africa

High: €15.78 (Denmark)



Low: €1.17 (South Africa)



3

Average Minimum Wage: Garden Centre Staff (p/h)

International Average: €10.74

€19.45 Denmark	€10.00 Canada
€17.70 Switzerland	€9.35 Germany
€14.25 Australia	€9.00 Spain
€13.25 USA	€7.00 Japan
€11.50 Ireland	€5.00 Poland
€11.50 UK	€1.38 South Africa
€10.25 France	

High: €19.45 (Denmark)



Low: €1.38 (South Africa)



4

National Unemployment Rate

International Average: 10.03%

32.5% South Africa	6.0% USA
24.2% Ireland	5.9% Denmark
16.5% Spain	5.8% Australia
8.2% France	4.8% UK
7.5% Canada	3.5% Switzerland
6.5% Poland	2.9% Japan
6.2% Germany	

High: 32.5% (South Africa)



Low: 2.9% (Japan)



5

Inflation/Consumer Price Index

International Average: 1.37%

4.3% Poland	1.0% Germany
3.0% South Africa	0.9% Australia
2.2% Canada	0.8% Ireland
1.6% UK	0.4% Denmark
1.6% USA	0.14% Japan
1.1% France	-0.2% Switzerland
1.0% Spain	

High: 4.3% (Poland)



Low: -0.2% (Switzerland)



6

Average Sale per Customer (excl Sales Tax)

International Average: €45.55

€75.00 Switzerland	€38.00 South Africa
€72.00 USA	€37.11 Canada
€55.00 Ireland (In store)	€35.00 Denmark
€150.00 Ireland (Online Sales)	€33.00 Germany
€40.47 UK	€33.00 Spain
€39.49 France	€28.00 Poland
€38.00 Australia	€20.70 Japan

High: €102.5 (Ireland)



Low: €20.70 (Japan)



7

Staff cost as % of Turnover

International Average: 22%

31.5% Switzerland	23.0% South Africa
26.6% USA	19.0% Denmark
25.0% Canada	19.0% Japan
24.0% Australia	18.0% Ireland
23.4% Germany	17.5% UK
23.0% Spain	14.0% Poland

High: 31.5% (Switzerland)



Low: 14% (Poland)



8

Advertising & Marketing costs: % of turnover

International Average: 2.6%

4% Ireland	2.2% Germany
4% Spain	2% Canada
4% South Africa	2% Denmark
3.5% Switzerland	2% Japan
3% Australia	2% UK
2.5% USA	0.5% Poland

High: 4% (Ireland, Spain, South Africa)



Low: 0.5% (Poland)



9

Plant sales as % of total sales

International Average: 48.29%

75% Canada	50% Australia
61% Poland	50% Denmark
61% USA	45% South Africa
59% Germany	27% UK
55% Japan	24% Ireland
55% Spain	10.8% France
55% Switzerland	

High: 75% (Canada)



Low: 10.8% (France)



10

Consumer cost on key products

4" or 9cm annual:

International Average: €2.59

€4.40 Australia	€2.70 UK
€4.25 Denmark	€2.50 Ireland
€4.15 USA	€2.00 Japan
€4.00 Canada	€1.70 Switzerland
€4.00 Spain	€1.44 South Africa



High: €4.40 (Australia)



Low: €1.44 (South Africa)



11

Consumer cost on key products

4" or 9cm perennial:

International Average: €3.76

€6.64 USA	€4.15 Switzerland
€5.50 Denmark	€3.00 Japan
€4.71 UK	€1.95 Ireland
€4.40 Australia	€1.75 Poland
€4.15 Spain	€1.44 South Africa



High: €6.64 (USA)



Low: €1.44 (South Africa)



12

Consumer cost on key products

1gallon/5l shrub:

International Average: €13.83

€21.00 Switzerland	€13.00 Spain
€20.00 Canada	€12.45 USA
€19.95 Ireland	€10.00 Japan
€15.95 Australia	€7.00 Poland
€15.32 UK	€4.00 South Africa
€13.50 Denmark	

High: €21 (Switzerland)



Low: €4.00 (South Africa)



13

Top Trends in Sales

1. Edible gardening

- *Berries*
- *Fruit trees & shrub*
- *Vegetables & herbs*



2. Indoor Plants



3. Flowering plants



14

Membership Status

Decline: Denmark, USA



Status Quo: Canada, Germany, Ireland, Japan, South Africa, Switzerland



Growth: Australia, France, Spain, UK



17

**Impact
of
Covid**



18

The impact of COVID-19

- **Canada:**
 - Unprecedented growth
- **Denmark:**
 - 40% growth
- **France:**
 - Lockdown in Spring and over Christmas was negative, but overall plant sales have increased.
- **Ireland:**
 - Significant decline in sales.
- **Japan:**
 - Increase in Home demand, decrease in Corporate & Gift demand.
- **Poland:**
 - Sales increased.
- **Spain:**
 - Growth in gardeners.
- **South Africa:**
 - Fantastic sales after a 5-week lockdown period. Growth of up to 30% recorded. Grow your Own product sales increased exponentially (veggies, herbs, fruit trees).
- **Switzerland:**
 - Increase in sale of House plants, fruits and vegetables.
- **UK:**
 - Initially very severe BUT when centres have been open trade has outperformed all expectations - core gardening - but catering remains poorer
- **USA:**
 - E-commerce created a strong and permanent root.



19

Trends seen during COVID-19

1. Grow your own (veggies, herbs, berries & fruit)
2. Home & Garden upgrades (outdoor living, balcony & terrace gardening)
3. Further shift to online sales
4. Increased interest in plants and gardens
5. First-time gardeners
6. Focus on health & well-being



20

Challenges experienced during COVID-19

1. Product Availability
2. Health & Safety Regulations & COVID-19 protocol
3. Staffing
4. Adapting to internet sales, deliveries and pick-up system
5. Retaining new customers
6. Trade restrictions

