

The European market potential for garden pots

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Most consumers of garden pots in Western European countries have access to their own outdoor space, and many of them are active gardeners. Those in small urban housing will create indoor gardens, placing plants around the house. This comes from a general trend to feel close to nature. Garden pots that can easily be moved around and can be used both indoors and outdoors offer consumers the flexibility they need. Design and sustainable values are important product benefits.

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1. Product description

Garden pots and planters are containers used to cultivate and display flowers, plants, and vegetables. They come in all shapes, sizes, colours, and materials. European consumers place garden pots on porches, on front steps, in gardens, and in urban settings, in small gardens, on balconies, rooftops, or inside the home.

Tip:

- For more information about outdoor home decoration, see our special study on the [garden](#).

Functionality

Garden pots need to allow effective water circulation to keep plants healthy and the soil rich. Sizes need to provide enough space for plants' roots and create good airflow.

Material

Various materials can be used for garden pots, such as terracotta, plastic, wood, stone, metal, or biodegradable materials. Garden pots should be easy to carry and move around to facilitate shopping, transport, and garden makeovers, which makes lightweight materials a popular option.

Design

Garden pots need to respond to trends in indoor and outdoor decoration, because design features such as shape and decoration matter. Oval and round shapes dominate, but square and other shapes are also used, depending on whether styles are more expressive or minimalist.

These pots are in a competitive, price-sensitive segment, and their design also needs to maximise container space. For that reason, pots are often designed with their packaging and the overall load capacity of the

container in mind.

Durability

As an outdoor product, garden pots need to withstand weather conditions ranging from bright sunshine to rain and snow. Wood containers may need annual treatment with a preservative or stain to retain their appearance and prevent deterioration.

2. What makes Europe an interesting market for garden pots?

The [COVID-19 pandemic](#) and the measures taken against it worldwide are having a large impact on international trade and the European market for many products and services, including home decoration and home textiles (HDHT). Please note that the below analysis is based on the statistics that are currently available (2015–2019). Therefore, the expected impact of the pandemic on the European market and global supply chains have not been taken into account in this report. For the latest news in your sector, please check [CBI News](#).

The pandemic is expected to affect demand for HDHT products. The current crisis results in very low consumer confidence, globally. In addition to their own health, consumers worry about having work at all, and to what extent their livelihoods will be under pressure. This obviously does not stimulate sales in HDHT, which is a non-essential goods category. Further, many brick and mortar retail businesses in HDHT have closed at least temporarily, and some may not survive the crisis for financial reasons. This scenario has also severely affected the distribution chain in the HDHT sector.

There are no relevant trade or production data available for garden pots specifically. Although the outlook for this market was positive before the pandemic, the effects of the current crisis are uncertain. Nonetheless, prospects for garden pots in particular seem relatively good. Consumers are expected to place greater emphasis on wellness, in which outside gardens and mini indoor gardens will play a considerable role (see trends). In addition, during the pandemic, European consumers have renovated their homes and gardens on a massive scale, which will stimulate demand even further.

Tip:

- For more information on the short and long-term impacts of the COVID-19 pandemic, see our study on [how to respond to COVID-19 in the HDHT sector](#).

3. Which European countries offer most opportunities for garden pots?

The larger Western European economies are the main importers of garden pots. However, importers in these countries generally sell their products across Europe. Your best strategy therefore is to focus on a particular segment, rather than a specific country.

According to industry experts, the main European importers of garden pots are Germany, the United Kingdom and France. Approximately [77% of British adults have a garden](#), which corresponds to roughly 40 million people. An estimated [60% of the French have a garden](#), the equivalent to approximately 40 million people. In Germany, there are [36 million people aged over 14 who own a garden](#), in addition to the several millions of consumers who use a balcony or patio space to have a few pots and plants.

An estimated [27 million people in the United Kingdom partake in gardening](#), while Germany has [up to 45 million hobby gardeners](#). In addition, [17 million French consumers are active gardeners](#). They spend quite some time on gardening: [34% of Germans, 29% of Britons and 28% of French do garden work at least once a week](#). Only

20%–29% indicate they never do any gardening at all.

However, different countries have different roles in the European market. You can make a rough distinction between countries that are mainly importers and countries that are mainly manufacturers. Most Western European importers do not just sell their products in their own country, but across Europe. This explains why in HDHT, small countries like Denmark and the Netherlands often import much more than the demand in their own domestic markets.

In terms of marketing, the countries themselves do not correspond to the markets per se. HDHT has different market segments ranging from low to high — see also our study on entering the market for garden pots. Every European country has these segments, although their size may vary per country. Therefore, it makes much more sense for you to identify a particular segment in your product group and connect to the importers and distributors in that segment, instead of a specific country. These distributors will then sell in that segment across Europe.

Real private consumption expenditure

An important indicator for growth in demand is real private consumption expenditure. The HDHT sector, which includes the garden pots market, is sensitive to economic cycles. When economic circumstances and prospects are dim, consumers postpone buying non-essential items. The other way around, when economic conditions are favourable, private consumption expenditure and purchases of non-essential HDHT products surge.

In recent years, the leading European markets showed an annual growth in real private consumption expenditure of approximately 1%–3%. Forecasts showed this positive trend continuing into the coming year, until the COVID-19 pandemic hit. Now, the predictions are uncertain. Because the HDHT market responds to economic cycles, demand is expected to reflect any potential economic fluctuations.

Germany is a key player in Europe

Germany is the largest economy in Europe, home to 19% of the European Union's population. Its economy is widely considered the stabilising force within the European Union, historically showing a higher growth rate than other Member States. The country is also an important trade hub within Europe, distributing imported HDHT products across the continent. In these uncertain circumstances, the combination of the country's relatively stable economy and its central role in European trade makes Germany one of the most interesting markets for you.

Brexit may negatively impact British demand

The United Kingdom generally has relatively high HDHT imports from developing countries, making it an interesting market for you. However, [the country's withdrawal from the European Union](#) (Brexit) may have a major impact on consumer confidence. The uncertainties related to Brexit, the COVID-19 pandemic and the resulting economic slowdown are expected to affect the consumption of HDHT products, including garden pots. As such, your prospects for the next few years are modest.

France's growth slowing down

French economic growth has slowed down recently after a gradual recovery. Global uncertainties and the effects of domestic social protests weighed on consumer confidence and the consumption of non-essential products. The additional unpredictability caused by the COVID-19 pandemic makes these trends expected to continue in 2020. Because France is an important trader in garden products, this market is likely to show improvement when French wholesalers start to recover.

Tip:

- Do not just focus on specific European countries. Instead, identify the appropriate segment and let

your buyers distribute your products across Europe within this segment.

4. Which trends offer opportunities on the European garden pots market?

Garden pots play a strong role in some major consumer trends that dominate the HDHT sector, including 'home sweet home', wellness and sustainability. For more information, see our study about [trends for Home Decoration & Home Textiles](#). We will outline each trend below, starting with the potential effects of the COVID-19 pandemic on the HDHT market.

The coronavirus and trends in HDHT and garden pots

It is hard to predict what direction consumption will take in HDHT in the short and long terms. However, early trends that are already visible include:

- more consumers ordering more online
- consumers spending more time at home are looking for entertainment and comfort
- consumers are renovating their homes, including gardens, balconies, and other outdoor areas

These short-term trends can be considered a continuation of consumer trends that were already ongoing, but some may have been now accelerated.

A major factor in consumer spending will be the availability of disposable income after the pandemic, which is expected to result in economic recession and consequent job losses. These concerns are reflected in the current historically low levels of consumer confidence.

Tip:

- Follow the international news, for example in [The Economist](#), especially as related to how global consumers change their consumption, work, and travel patterns. Reflect on the possible short and long term effects on HDHT and your business. See how big global companies are responding to the crisis, both to contribute positively to the damage that the crisis does to society, and to protect themselves from the loss of income they are also experiencing. What innovations can help you in your domestic and international marketing, post-crisis?

Millennial influence: the on-demand economy

In the on-demand economy, consumers want what they need *now*; they order online and have it delivered to their doorstep. During the crisis, online shopping became the norm for the majority of consumers. Post-crisis, this is expected to gather force. The millennial generation, soon to be the dominant global consumer, is online 24/7. They form the basis of this trend. In addition, the baby boomer generation that never did much shopping online, has now also embraced it in larger numbers. Much of this will become a permanent reality, also in HDHT.

Consumers ordering more online is a business-to-consumer (B2C) trend, meaning that retailers will need to adopt e-commerce strategies towards the end consumer. Or even better: a multiple channel strategy consisting of physical and digital retail. End consumers are not likely to buy straight from you as an overseas manufacturer or exporter.

Tips:

- Facilitate the e-commerce strategies of your chain partners, most of all retailers. This includes providing small runs, consumer packaging, design that facilitates shipping, and just-in-time arrangements.
- Offer excellent service, competitive pricing and shorter time-to-market, such as by increasing productivity, improving your logistics, and distributing straight to retail.
- Appeal to millennial consumers, for example, through expressive styles. For more information, see our study on trends in HDHT, particularly [millennial influence](#) and [playfulness](#).

Home sweet home: sheltering, enjoying company and working at home

In this trend, the home functions as a shelter for consumers, particularly older people. This consumer makes the home a retreat with a comfortable, quite luxurious interior — a world in of itself. However, home sweet home is also about families or groups of friends enjoying each other's company, entertaining each other, cooking and dining, or just relaxing. These two aspects of inside living have been strengthened by the COVID-19 pandemic.

Plants are very central to cosyng up the home, and it has already been quite a long-term trend that the garden and balcony have become an extension of the home. It is now equally decorated, and in a style that extends the indoor style to the outside areas.

The pandemic has moved large parts of the workforce to work from home temporarily, but many may well continue to do so, because of better productivity, communication, reduced or eliminated commutes, technology facilitation, and convenience. This has created the need for home offices or flexible workspaces around the home. As plants had already become a normal feature of the office, this will now be continued at home.

Consumers may continue to do do-it-yourself projects, also post-crisis. After renovation comes decoration, and this will again focus more attention on creating cosy, comfortable spaces at home. This could boost sales in the typical DIY categories, presenting opportunities for tailoring the assortments even more to lifestyle than before, such as including ready-made furniture, dinnerware, and home textiles. At the same time, the garden has been included in the renovation boom and that will also have a positive effect on the demand for garden pots.

Tips:

- Offer styles with a historical, retro touch (such as art deco) to tap into the home sweet home trend. Study major historical design trends to cater to this important consumer need.
- Create coherent collections of plant pots for inside and outside the house. Careful segmentation will be required, because the older 'home-as-a-shelter' customer is less price sensitive than families and professionals working from home.

Wellness: closer to nature

Wellness drives the megatrend of consumers improving their physical and mental health in how they live and how they consume. This will gather greater force due to the global health crisis. To live closer to nature is one way of doing so. This translates in enjoying the garden more, decorating it, eating and drinking, and entertaining outside, gardening, and just taking time off and enjoying the outdoors. Garden pots have an important role to play in this context. They add instant nature and decoration, and allow consumers to grow decorative plants and food crops.

While boundaries between interior and exterior decoration are blurring, the garden has also literally moved indoors. And, even indoors, consumers also have an increasing need to be surrounded by nature. Houseplants

are more popular than ever, especially evergreen and hardy plants with strong sculptural forms that require a minimal amount of care. The office — now increasingly also part of home — has followed suit, as a green environment is recommended as a way to stimulate productivity.

As plants gain popularity, so do garden pots. Large pots are placed on the floor and clustered to create a mini forest. The windowsill is filled with pots, as are the kitchen, bathroom, study, and bedroom. Urban consumers also keep their plants in spaces like balcony gardens, square-foot gardens, instant gardens and mini conservatories.

This same need to feel closer to nature also sparks an interest in natural materials, such as blonde wood, stone, and terracotta.

Picture 1: A collection of terracotta pots in various designs



Tips:

- Accompany your garden pots with tips about gardening, growing plants for food, and creating and maintaining indoor gardens. This taps into aspects of the wellness trend that relate to consumers being eager to develop their skill sets.
- To allow consumers to be in contact with nature, use natural materials where possible. You can also apply floral decoration, but avoid coating or varnishing your garden pot surfaces with synthetics.
- Extend your collections with indoor garden pots and create solutions for all areas and applications, such as hanging pots for the kitchen and mini conservatories for the balcony.

Sustainability: people and planet

Millennials soon will be the dominant consumer group. They list climate change as their main concern and are used to expressing their preferences through consumption. In addition, this generation strongly advocates diversity in terms of race, gender, and lifestyle. As such, people and environmental friendliness is rapidly becoming a more central consumer need, also in HDHT.

Trend forecaster [Lidewij Edelkoort](#) makes the point that the COVID-19 pandemic paradoxically makes people feel less stressed, less under constant pressure, and less in need of the latest trend item. Enjoying a bit more calm and reflection, people appreciate what they have, which may be an indication of life post-pandemic. The reduction in global travel, industrial production, and overcrowding, makes people feel healthier, sense cleaner air, and experience less of the usual guilt about their excessive consumption patterns. In short, Ms Edelkoort believes many people may opt for or at least hope for more considerate lifestyles. For HDHT, this may translate as consumers less interested in the latest trends, but instead embracing more timeless design. She also advocates that consumer patterns will lead to a reduction in the pressure on natural resources by recycling, reducing, re-using, as well as refusing (meaning buying less and more essentially).

Gardening and the product group of garden pots and planters fit in well with this trend, creating a greater appreciation of nature, favouring more modest and focused lifestyles.

Picture 2: Wooden pots in various shades



Tips:

- Investigate greener raw materials for your garden pots, such as natural, renewable, biodegradable, or recycled materials. When innovating, keep in mind that some composites that are lightweight and offer greater design flexibility have a large carbon footprint or environmental impact.
- Clean up your production process, for example, by managing energy, water, and waste. This can save costs, help the environment, and provide better working conditions for producers and workers.
- Look for reductions in transport volume and costs. Transport is a big issue in the garden pot segment, so any reductions help both the planet and profits.
- If your importer is interested, consider certification options, such as fair trade, so consumers can identify you as a socially sustainable business, through community-based, ethical, or diversity practices. Especially in the competitive and price-sensitive category of garden pots, consumers will support businesses that stand for something. If and when this makes sense, such social compliance can be expressed by codes of conduct or certifications. For more information on this, see our study about [buyer requirements](#).
- For more information on this trend, see our special study about [sustainability](#).

Buying local

A continuing trend also in garden pots, is for professional buyers to buy close to home domestically, or from another European country. Drivers of this trend include lower transport costs, just-in-time ordering, greater control over quality and logistics, and the option to buy smaller runs. Italy, France, and Portugal have a strong tradition in the production of terracotta pottery. In addition, Eastern European countries are emerging as suppliers of industrially produced ceramic and synthetic planters for the garden and indoors.

Recently, due to the COVID-19 pandemic, consumers have also expressed a preference for buying local, as a gesture of solidarity, to support domestic retailers and brands. This trend of buying local pushes exporters of garden pots from developing countries into greater competitiveness.

Tips:

- Increase your competitive advantage by improving your operational excellence through increased productivity, lowering costs, and creating more convenient terms, including shorter runs and clever logistical solutions. A second option to increasing your competitiveness, is to excel in product design and innovation. Finally, you can create a serious competitive edge by intensive marketing, resulting in effective sourcing, servicing and retaining customers.
- Focus on sustainability, which is rapidly becoming a differentiator. Concepts with genuine social and environmental values may create a winning edge.

[ANCO Company Limited](#) is an experienced and successful Vietnamese manufacturer of garden pots and garden decoration that use different materials, such as stoneware, fibre cement and light concrete. Their strengths are in product innovation as well as marketing, and maintaining a wide network of global distributors.

This study was carried out on behalf of CBI by [Globally Cool B.V.](#) in collaboration with GO! GoodOpportunity.

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