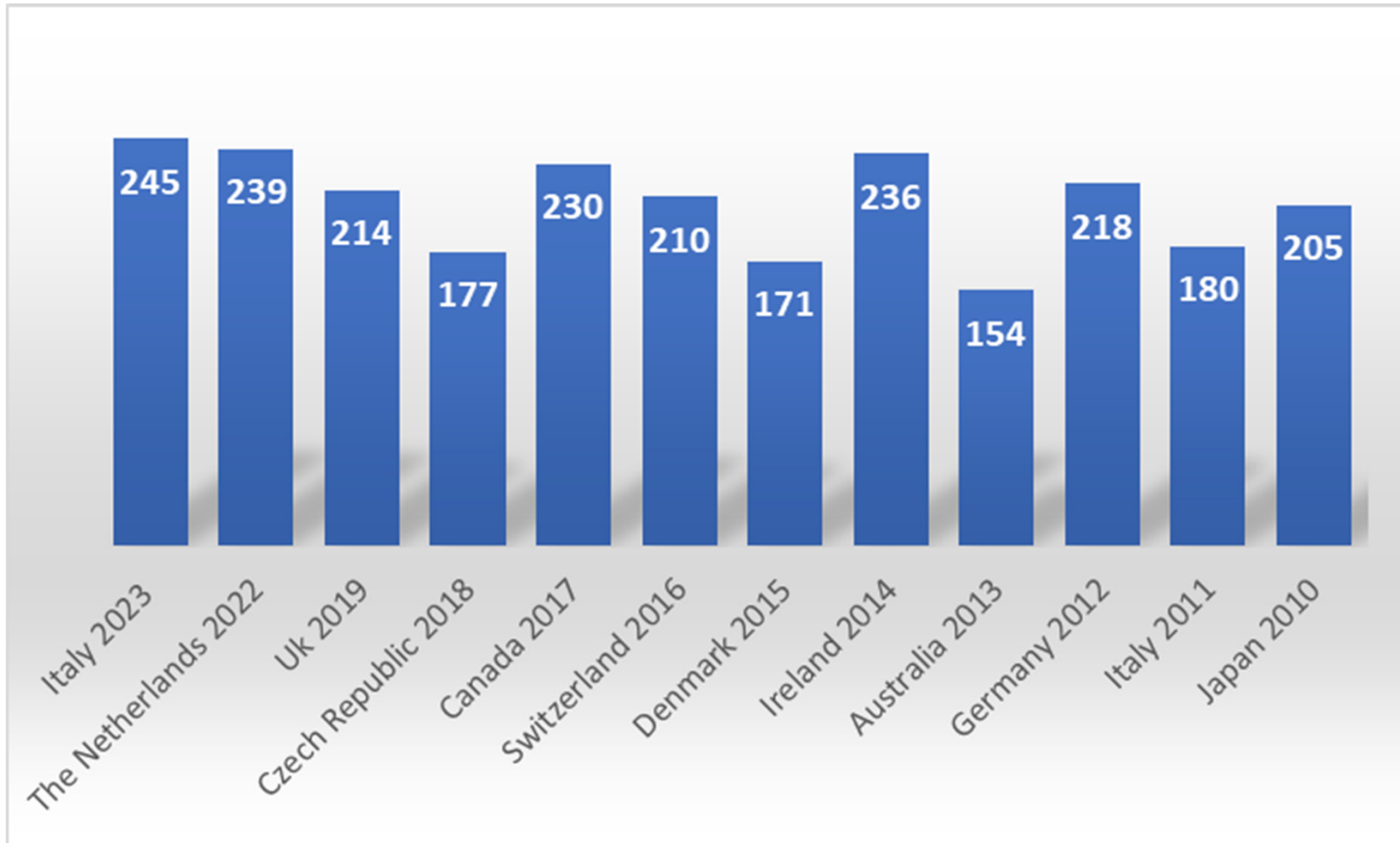


# MEMBER COUNTRY REPORTS

24 SEPTEMBER 2023



# Congress Attendance



# Economic Environment

**Weak:** Czech Republic, France, Japan, The Netherlands, Spain, South Africa



**Status Quo:** Australia, Canada, Denmark, Ireland, Italy, Switzerland, UK, USA



# Average National Minimum Wage (per hour)

**International Average: €9.65**

€30.73 The Netherlands

€13.71 Australia

€10.74 UK

€10.50 Ireland

€10.45 Germany

€10.00 Spain

€9.50 USA

€8.56 Canada

€7.00 Italy

€6.70 Japan

€3.19 Czech Republic

€3.05 China

€1.35 South Africa

**High: €30.71 (The Netherlands)**



**Low: €1.35 (South Africa)**



# Average Minimum Wage - Garden Centre Staff (per hour)

## General Workers

**International Average: €11.58**

€20.36	Denmark
€17.70	Switzerland
€16.50	USA
€14.00	Australia
€12.00	Germany
€12.00	Ireland
€12.00	UK
€10.51	Canada
€10.00	Spain
€9.00	Japan
€9.00	Italy
€5.80	Czech Republic
€1.65	South Africa

**High: €20.36 (Denmark)**

**Low: €1.65 (South Africa)**

## Cashiers

**International Average: € 11.75**

€17.70	Switzerland
€17.50	USA
€17.38	Denmark
€14.00	Australia
€12.00	Ireland
€12.00	UK
€12.00	Japan
€11.50	Canada
€10.00	Spain
€9.00	Italy
€5.90	Czech Republic
€1.98	South Africa

**High: €17.70 (Switzerland)**

**Low: €1.98 (South Africa)**

## Supervisors/Managers

**International Average: € 15.92**

€32.50	USA
€29.11	Denmark
€19.40	Canada
€18.00	Australia
€17.50	Ireland
€15.00	Japan
€15.00	Italy
€15.00	Spain
€14.00	UK
€8.80	Czech Republic
€2.80	South Africa

**High: €32.50 (USA)**

**Low: €2.8 (South Africa)**

# National Unemployment Rate

**International Average: 6,8%**

33,0%	South Africa	3,8%	UK
11,7%	Spain	3,8%	USA
7,4%	Italy	3,6%	Australia
7,1%	Australia	2,8%	Denmark
5,5%	Canada	2,6%	Czech Republic
5,2%	Germany	2,5%	Japan
4,2%	Ireland	1,9%	Switzerland

**High: 33% (South Africa)**



**Low: 1,9% (Switzerland)**



# Inflation/Consumer Price Index

**International Average: 5,9%**

16,7%	Czech Republic	5,6%	France
7,2%	Spain	4,7%	South Africa
6,8%	UK	3,3%	Canada
6,7%	Denmark	3,2%	USA
6,2%	Germany	2,7%	Japan
6,0%	Australia	1,6%	Switzerland
5,8%	Ireland		

**High: 16,7% (Czech Republic)**



**Low: 1,6% (Switzerland)**



# Average Sale per Customer (excl Sales Tax)

## International Average: €41,58

€88,00	USA	€37,11	Canada
€75,00	Switzerland	€36,00	Spain
€49,00	Australia	€33,00	Germany
€48,00	Ireland	€25,10	Czech Republic
€45,00	Denmark	€25,00	Italy
€41,00	UK	€21,00	Japan
€38,92	France	€20,00	South Africa

**High: €88 (USA)**



**Low: €20 (South Africa)**





# Average VAT Overall Rates (Value Added Tax)

**International Average: 15,7%**

25%	Denmark	15%	South Africa
23%	Ireland	10%	Australia
22%	Italy	10%	Canada
21%	Czech Republic	10%	Japan
21%	The Netherlands	7,7%	Switzerland
21%	Spain	5,5%	France
20%	UK	5,09%	USA
19%	Germany		

**High: 25% (Denmark)**



**Low: 5,09% (USA)**



# Average VAT on Plants (Value Added Tax)

**International Average: 11,39%**

25,00%	Denmark	10,00%	Italy
20,00%	UK	10,00%	Spain
15,00%	Czech Republic	9,00%	Netherlands
15,00%	South Africa	7,50%	France
13,50%	Ireland	7,00%	Germany
10,00%	Australia	5,00%	Canada
10,00%	Japan	2,50%	Switzerland

**High: 25% (Denmark)**



**Low: 2,5% (Switzerland)**



# Staff Cost as Percentage of Turnover

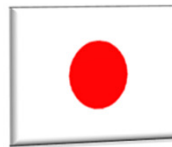
**International Average: 22,7%**

31%	Switzerland	21%	Italy
30%	USA	20%	The Netherlands
27%	Denmark	19%	Ireland
25%	Canada	19%	Spain
24%	South Africa	19%	UK
23,2%	Germany	18,93%	Czech Republic
22,5%	Australia	18%	Japan

**High: 31% (Switzerland)**



**Low: 18% (Japan)**

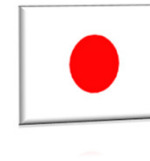


# Percentage of Workforce that is local (vs foreign)

**International Average: 90,8%**

100%	Canada	93%	Ireland
100%	Japan	93%	Italy
98%	Denmark	80%	Australia
95%	UK	80%	Czech Republic
94%	South Africa	75%	Spain

**High: 100% (Canada, Japan)**



**Low: 75% (Spain)**



# Percentage of students employed as casual workers

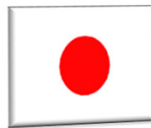
**International Average: 15,4%**

50%	Canada	10%	USA
35%	Ireland	5%	Denmark
20%	Australia	5%	South Africa
20%	UK	3%	Czech Republic
10%	Italy	1%	Japan
10%	Spain		

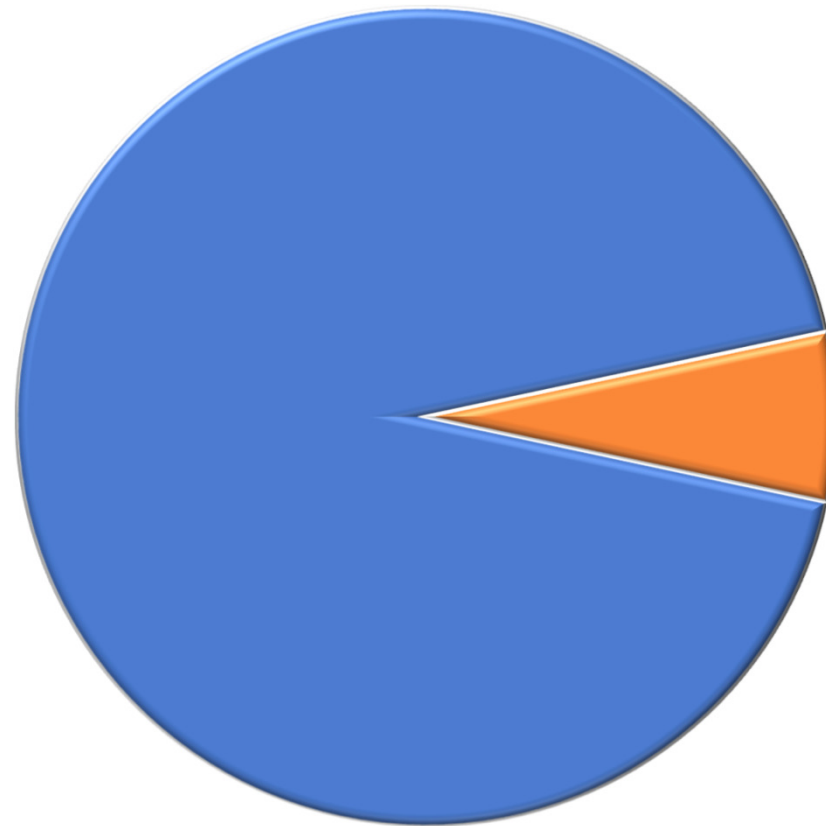
**High: 50% (Canada)**



**Low: 1% (Japan)**



# Difficulty Finding Staff



■ Difficult ■ Medium ■ Easy



# Initiatives to attract, train & retain staff



## Attract:

- Advertising
- Exhibitions & career fairs

## Train & Retain:

- Training programme
- Workshops
- E-learning modules
- Flexible working hours



# Advertising & Marketing Cost: % of Turnover

**International Average: 2,7%**

4,0%	Australia	2,0%	Canada
4,0%	Denmark	2,0%	Czech Republic
4,0%	Spain	2,0%	Japan
4,0%	Switzerland	2,0%	Italy
2,8%	South Africa	2,0%	USA
2,6%	Ireland	1,8%	Germany
2,5%	UK		

**High: 4% (Australia, Denmark, Spain, Switzerland)**



**Low: 1,8% (Germany)**





# Plant Sales: % of total Sales

**International Average: 53,5%**

75,0%	Canada	57,0%	Spain
70,0%	France	55,0%	Switzerland
60,0%	Australia	53,0%	Denmark
60,0%	Japan	52,0%	Czech Republic
59,0%	South Africa	42,0%	Italy
58,5%	Germany	25,0%	Ireland
58,5%	USA	25,0%	UK

**High: 75% (Canada)**



**Low: 25% (Ireland, UK)**



# Consumer cost on Key products

4" or 9cm Annual

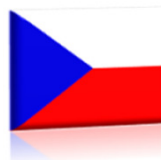
**International Average: €3,12**

€6,99	USA	€2,50	Ireland
€4,70	Australia	€2,00	Italy
€4,50	Denmark	€1,90	Switzerland
€4,00	Canada	€1,53	South Africa
€4,00	UK	€1,30	Spain
€3,00	Japan	€1,00	Czech Republic

**High: €6,99 (USA)**



**Low: €1 (Czech Republic)**



# Consumer cost on Key products

## 4" or 9cm Perennial

**International Average: €4,9**

€9,35	Canada	€4,00	UK
€8,99	USA	€3,60	Switzerland
€7,00	Denmark	€2,90	Czech Republic
€5,20	Ireland	€2,90	Italy
€5,00	Japan	€2,60	Spain
€4,70	Australia	€2,50	South Africa

**High: €9,35 (Canada)**



**Low: €2,50 (South Africa)**



# Consumer cost on Key products

## 1 Gallon/5l shrub

**International Average: €19**

€30,00	UK	€18,00	Japan
€29,99	Ireland	€17,50	Czech Republic
€24,70	Switzerland	€16,50	Australia
€22,99	USA	€13,00	Denmark
€20,00	Canada	€ 8,10	South Africa
€19,00	Spain	€ 7,00	Italy

**High: €30 (UK)**

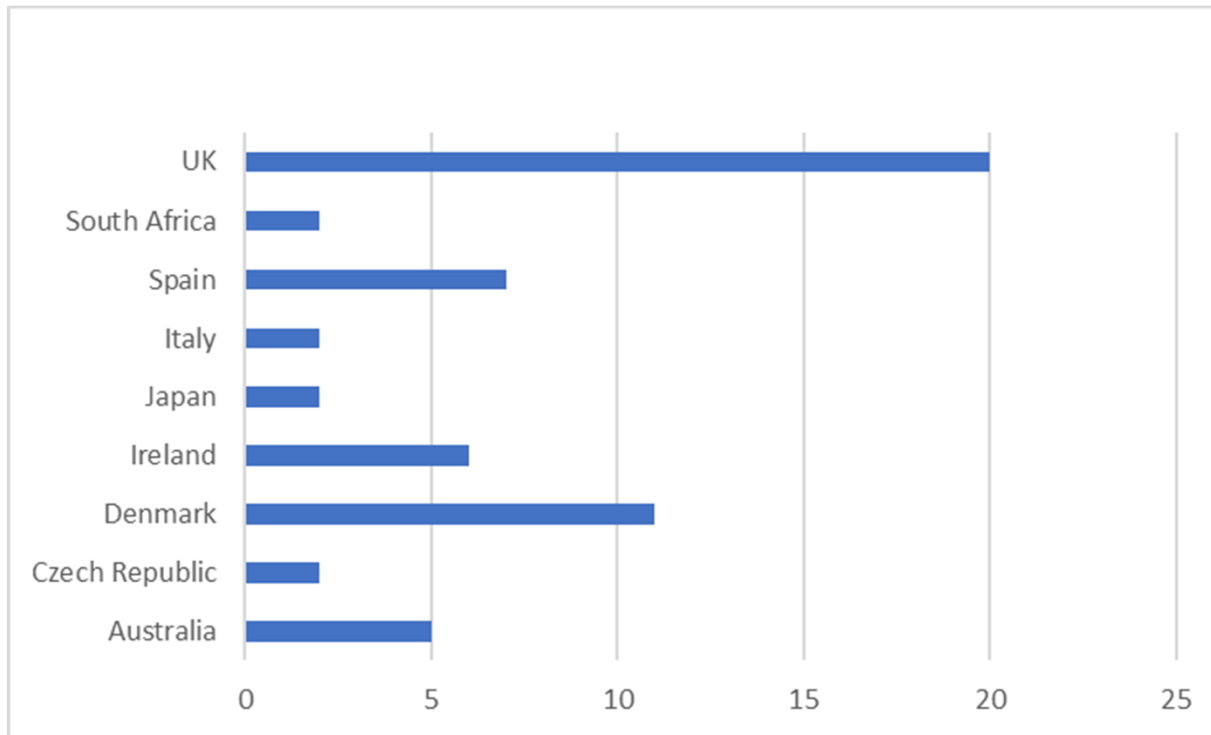


**Low: €7,00 (Italy)**



# Internet Sales

**International Average: 5%**



\*Products differ from country to country ranging from all garden centre products (including plants) to only hard goods, seeds, plant care products and décor items

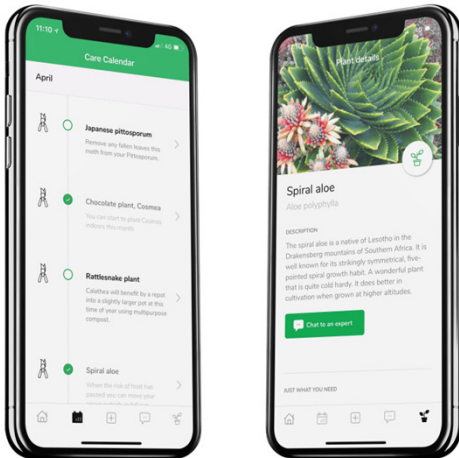


# Top Trends in Sales

- Colour
- Vegetables & Herbs (Grow Your Own)
- Indoor & Container Plants
- Giftware
- Pots & Containers



# Top Consumer Marketplace Trends



- Use of technology
- Shop locally/regionally
- Consumers check prices before buying
- Focused on environmental awareness & biodiversity

# Marketing Initiatives

- Social Media
- Promotions & Events
- Newsletters
- Magazines





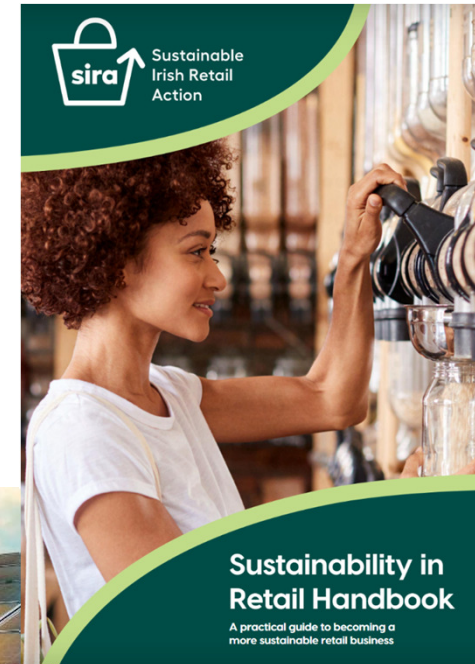
# Top Issues

- Weather & environmental factors
- Economy
- Recruitment & retention of skilled staff
- Competition from Box stores
- Water
- Availability of goods
- Changing consumer behaviour



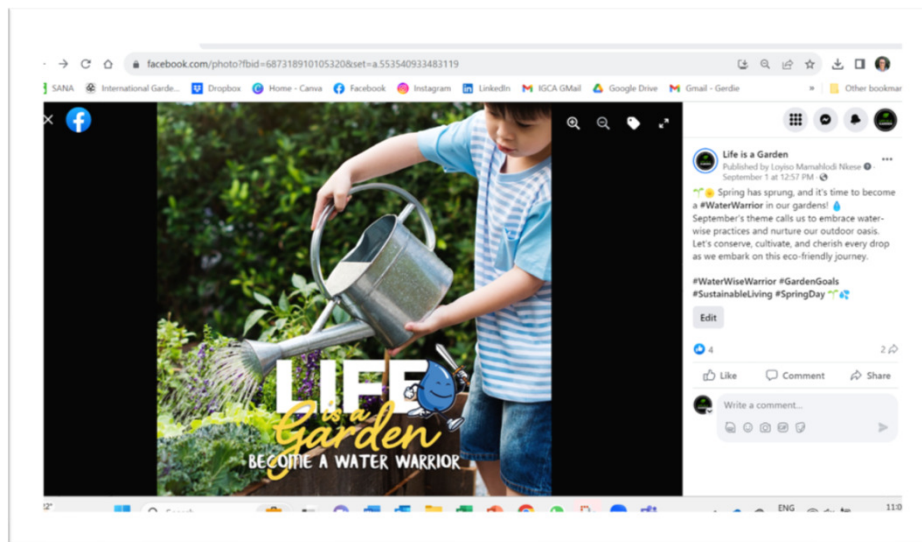
# Sustainable practices within garden centres

- Recycling
- Rainwater harvesting
- Implementing water saving techniques
- Installation of solar panels
- Sustainable Guidelines

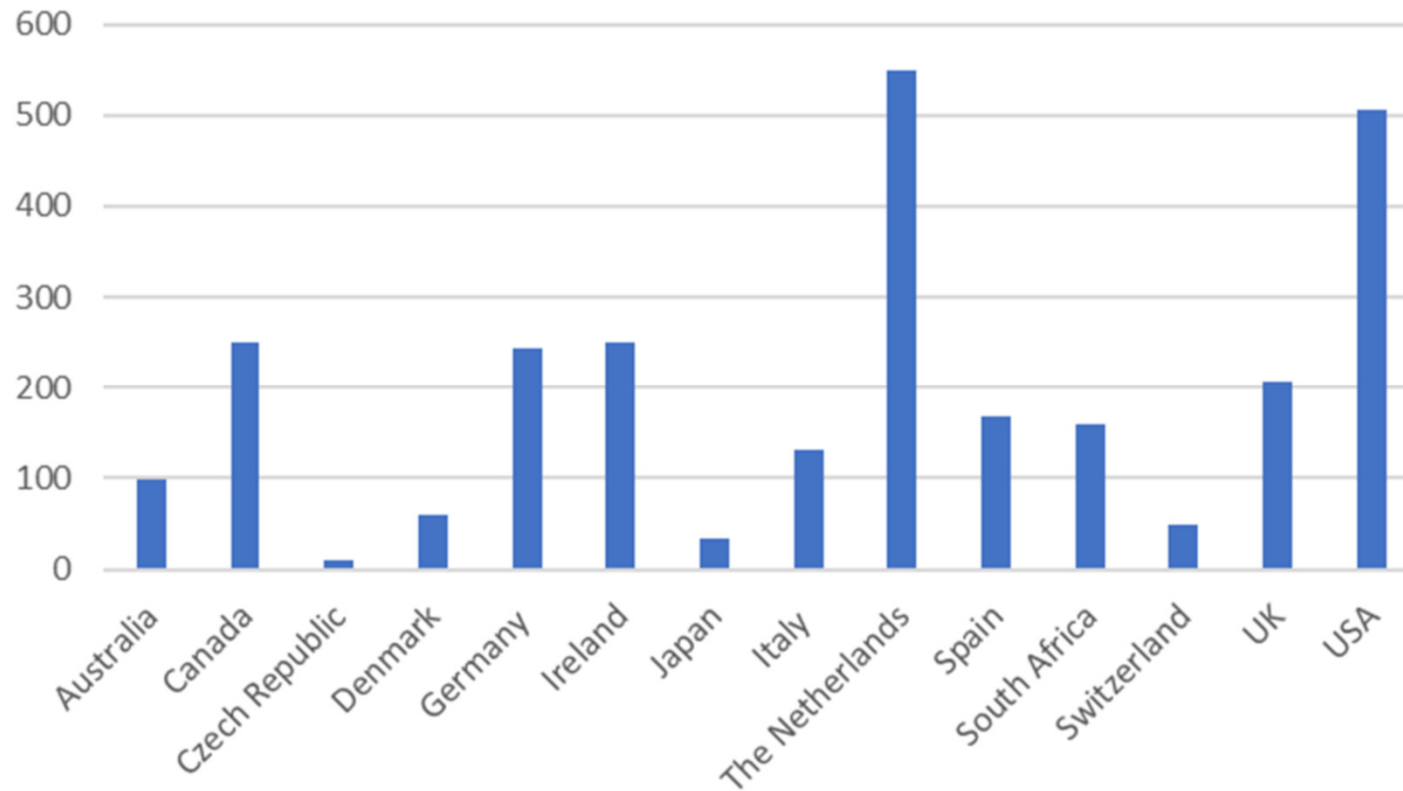


# Consumer Education on Sustainability

- Workshops
- Newsletters
- Posters to use in-store
- Social media awareness
- Consumer campaigns



# Association Membership



# Change in Association membership

## Decline:

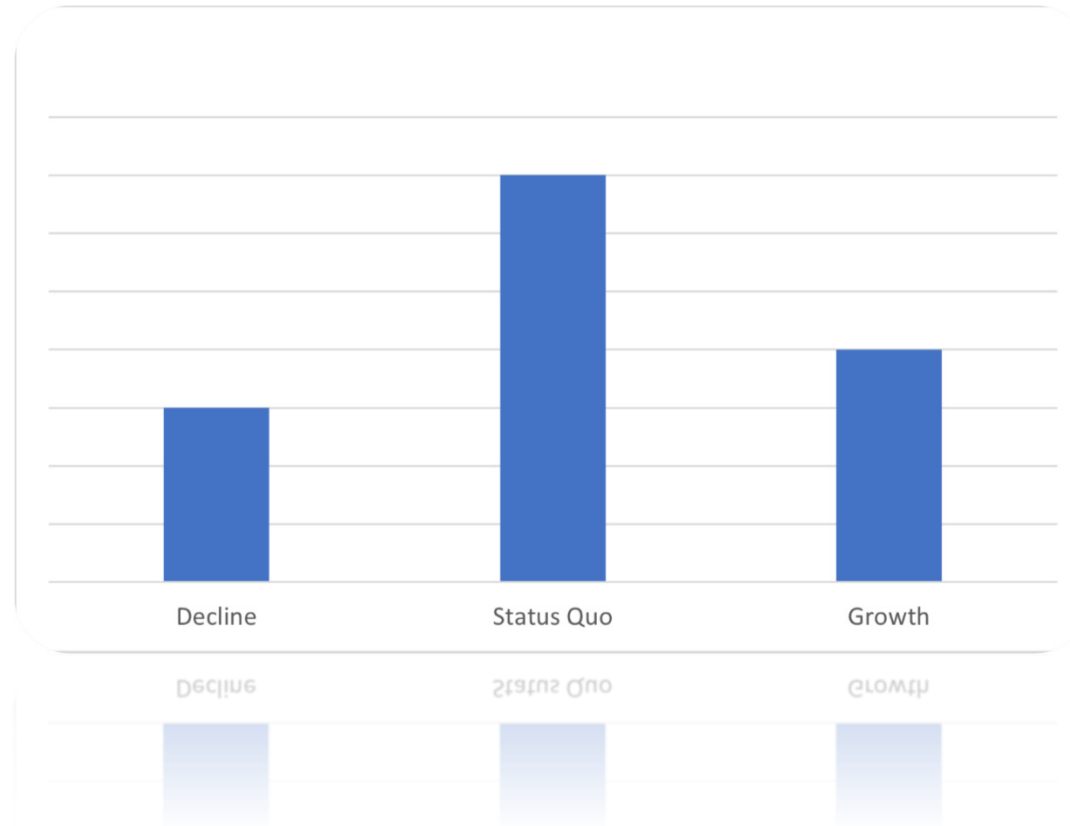
- Australia
- Denmark
- France

## Status Quo:

- Canada
- Czech Republic
- Ireland
- Japan
- The Netherlands
- South Africa
- Switzerland

## Growth:

- Germany
- Italy
- Spain
- UK
- USA



# Upcoming Congresses

**2024**

Quebec, Canada  
25- 30 August



**2025**

Cape Town, South Africa  
19 – 24 October

