

MEMBER COUNTRY REPORTS

February 2024

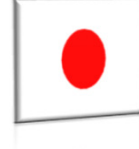


Economic Environment

Weak: France, Italy, The Netherlands, Spain



Status Quo: Canada, Czech Republic, Denmark, Germany, Japan, South Africa, Switzerland, USA



Strong Growth: Poland



Average National Minimum Wage (per hour)

International Average: €9,48

€14,00 USA

€13,81 Australia

€13,27 The Netherlands

€12,80 Ireland

€12,41 Germany

€12,00 UK

€11,65 France

€11,3 Canada

€10,0 Spain

€6,70 Japan

€4,60 Poland

€4,53 Italy

€4,50 Czech Republic

€1,25 South Africa

High: €14,00 (USA)



Low: €1,25 (South Africa)



Average Minimum Wage - Garden Centre Staff (per hour)

General Workers

International Average: €12.20

€20.86	Denmark
€19.00	The Netherlands
€18.70	Switzerland
€16.50	USA
€15.73	Germany
€14.00	Australia
€12.70	Ireland
€12.20	France
€12.00	UK
€10.51	Canada
€10.00	Spain
€9.00	Italy
€9.00	Japan
€7.00	Poland
€6.70	Czech Republic
€1.38	South Africa

High: €20.86 (Denmark)

Low: €1.38 (South Africa)

Cashiers

International Average: €11.60

€18.70	Switzerland
€18.08	Denmark
€17.50	USA
€14.00	The Netherlands
€13.95	Germany
€13.81	Australia
€12.70	Ireland
€12.20	France
€12.00	UK
€11.50	Canada
€10.00	Spain
€9.00	Italy
€7.00	Japan
€7.00	Poland
€6.70	Czech Republic
€1.53	South Africa

High: €18.70 (Switzerland)

Low: €1.53 (South Africa)

Supervisors/Managers

International Average: € 17.70

€32.50	USA
€30.16	Denmark
€23.60	Germany
€25.50	The Netherlands
€19.40	Canada
€18.20	Ireland
€18.00	Australia
€15.00	Italy
€15.00	Japan
€15.00	Spain
€14.38	UK
€10.20	Czech Republic
€10.00	Poland
€2.32	South Africa

High: €32.50 (USA)

Low: €2.32 (South Africa)

Price of a Big Mac

International Average: €4.79

€8.30	Switzerland	€4.60	Australia
€5.69	USA	€4.60	Poland
€5.50	Spain	€4.50	Czech Republic
€5.49	Germany	€4.33	Ireland
€5.25	The Netherlands	€4.21	Canada
€5.23	Italy	€3.43	UK
€5.20	Denmark	€3.10	Japan
€4.86	France	€2.40	South Africa

High: €8.30 (Switzerland)

Low: €2.40 (South Africa)



National Unemployment Rate

International Average: 6,40%

32,0%	South Africa	3,8%	Australia
11,7%	Spain	3,7%	USA
7,8%	France	3,2%	UK
7,5%	Italy	2,8%	Poland
5,7%	Germany	2,7%	Czech Republic
5,5%	Canada	2,7%	Denmark
4,5%	Ireland	2,5%	Japan
4,0%	The Netherlands	2,3%	Switzerland

High: 32% (South Africa)



Low: 2,3% (Switzerland)



Inflation/Consumer Price Index

International Average: 4.63%

10.7%	Czech Republic	3.8%	Spain
6.5%	Poland	3.7%	Germany
5.7%	Italy	4.7%	South Africa
5.3%	Australia	3.3%	Canada
5.0%	South Africa	3.3%	Denmark
4.7%	UK	3.3%	USA
4.6%	Ireland	3.2%	Japan
4.0%	The Netherlands	2.1%	Switzerland

High: 10.7% (Czech Republic)



Low: 2.1% (Switzerland)



Interest Rates - Business Loans

International Average: 5.53%

10.0%	South Africa	6.00%	Denmark
8.5%	USA	6.00%	The Netherlands
8.0%	Australia	5.00%	Poland
8.0%	UK	4.50%	Germany
7.0%	Canada	4.28%	France
7.0%	Ireland	2.00%	Spain
6.0%	Czech Republic	1.16%	Italy

High: 10% (South Africa)



Low: 1.16% (Italy)



Interest Rates - Personal Loans

International Average: 7.25%

12%	Canada	6%	Poland
11%	Czech Republic	6%	Spain
11%	South Africa	6%	UK
10%	Italy	5%	Australia
7%	Germany	5%	The Netherlands
7%	Ireland	4.5%	France
7%	USA	4%	Denmark

High: 12% (Canada)



Low: 4% (Denmark)



Average Sale per Customer (excl Sales Tax)

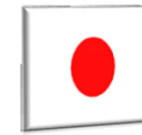
International Average: €39,32

€82,00	USA	€33,00	France
€75,00	Switzerland	€32,79	Germany
€49,00	Australia	€28,00	Poland
€48,00	Denmark	€28,00	The Netherlands
€48,00	Ireland	€25,36	Czech Republic
37,95	UK	€25,00	Italy
€37,11	Canada	€21,00	Japan
€36,00	Spain	€21,00	South Africa

High: €82 (USA)



Low: €21 (Japan, South Africa)



Average VAT Overall Rates (Value Added Tax)

International Average: 17,07%

25%	Denmark	20%	UK
23%	Ireland	19%	Germany
23%	Poland	15%	South Africa
22%	Italy	10%	Australia
21%	Czech Republic	10%	Canada
21%	Spain	10%	Japan
21%	The Netherlands	8,1%	Switzerland
20%	France	5,09%	USA

High: 25% (Denmark)



Low: 5,09% (USA)



Average VAT on Plants (Value Added Tax)

International Average: 10,76%

25%	Denmark	10%	Japan
20%	UK	10%	Spain
15%	South Africa	9%	The Netherlands
13,5%	Ireland	8%	Poland
12%	Czech Republic	7%	Germany
10%	Australia	5%	USA
10%	France	5%	Canada
10%	Italy	2,6%	Switzerland

High: 25% (Denmark)



Low: 2,6% (Switzerland)



Staff Cost as Percentage of Turnover

International Average: 22.5%

31.5%	Switzerland	22.5%	Australia
30.0%	USA	21.0%	Italy
26.0%	Denmark	19.5%	The Netherlands
25.0%	Canada	19.0%	Ireland
23.5%	Germany	19.0%	Japan
23.0%	Spain	18.8%	Czech Republic
23.0%	South Africa	14.0%	Poland
22.6%	UK		

High: 31.5% (Switzerland)



Low: 14% (Poland)



Percentage of Workforce that is local (vs foreign)

International Average: 92%

100%	Canada	93%	Italy
100%	France	92%	South Africa
100%	Japan	90%	Ireland
98%	UK	80%	Australia
97%	Denmark	80%	Czech Republic
95%	The Netherlands	75%	Spain
95%	Poland		

High: 100% (Canada, France, Japan)

Low: 75% (Spain)



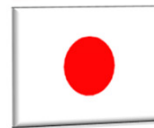
Percentage of students employed as casual workers

International Average: 13,3%

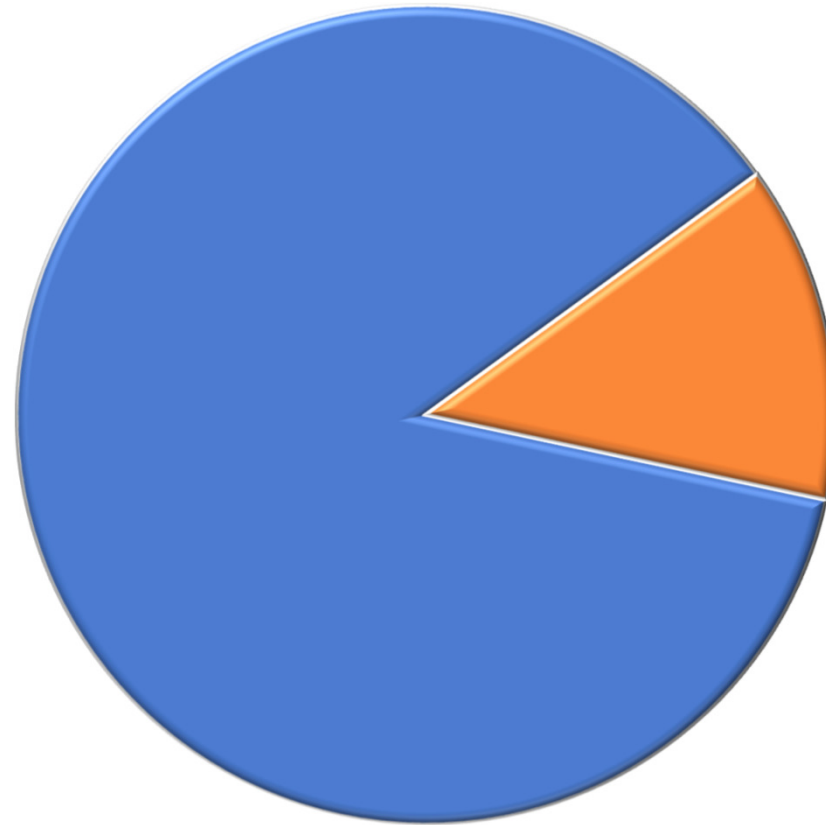
50%	Canada	10%	USA
35%	Ireland	6%	Denmark
20%	Australia	5%	South Africa
16%	Germany	4%	UK
15%	The Netherlands	3%	Czech Republic
10%	Italy	1%	Japan
10%	Spain	1%	Poland

High: 50% (Canada)

Low: 1% (Japan, Poland)



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: 2,77%

5,0%	Denmark	2,5%	Czech Republic
4,0%	Australia	2,0%	Canada
4,0%	Spain	2,0%	Italy
4,0%	Switzerland	2,0%	Poland
3,0%	The Netherlands	2,0%	USA
2,6%	Ireland	1,9%	Germany
2,6%	South Africa	1,0%	Japan

High: 5% (Denmark)



Low: 1% (Japan)



Plant Sales: % of total Sales

International Average: 50,3%

75,0%	Canada	54,5%	Czech Republic
60,0%	Australia	50,0%	Denmark
60,0%	Japan	50,0%	Poland
59,5%	Germany	50,0%	Poland
59,0%	South Africa	44,5%	The Netherlands
58,5%	USA	42,0%	Italy
57,0%	Spain	26,0%	Ireland
55,0%	Switzerland	14,0%	UK

High: 75% (Canada)



Low: 14% (UK)



Consumer cost on Key products

4" or 9cm Annual

International Average: €2,86

€6,52	USA	€2,00	Switzerland
€5,00	Australia	€1,80	South Africa
€5,00	Denmark	€1,30	Spain
€4,59	UK	€1,20	Poland
€4,00	Canada	€1,10	Czech Republic
€3,00	Japan	€1,00	Germany
€2,50	Ireland	€1,00	Italy
€2,00	Switzerland		

High: €6,52 (USA)

Low: €1 (Germany, Italy)



Consumer cost on Key products

4" or 9cm Perennial

International Average: €4,57

€9,35	Canada	€3,85	Switzerland
€8,39	USA	€3,15	Czech Republic
€6,50	Denmark	€2,60	Spain
€5,73	UK	€2,60	South Africa
€5,20	Ireland	€2,50	Italy
€5,00	Australia	€2,29	Germany
€5,00	Japan	€1,90	Poland

High: €9,35 (Canada)



Low: €1,90 (Poland)



Consumer cost on Key products

1 Gallon/5l shrub

International Average: €18,62

€29,99	Ireland	€19,00	Spain
€28,75	UK	€18,00	Japan
€26,30	Switzerland	€17,00	Australia
€21,46	USA	€17,00	Denmark
€20,00	Canada	€12,00	Italy
€19,95	Germany	€ 6,13	South Africa
€19,20	Czech Republic	€ 6,00	Italy

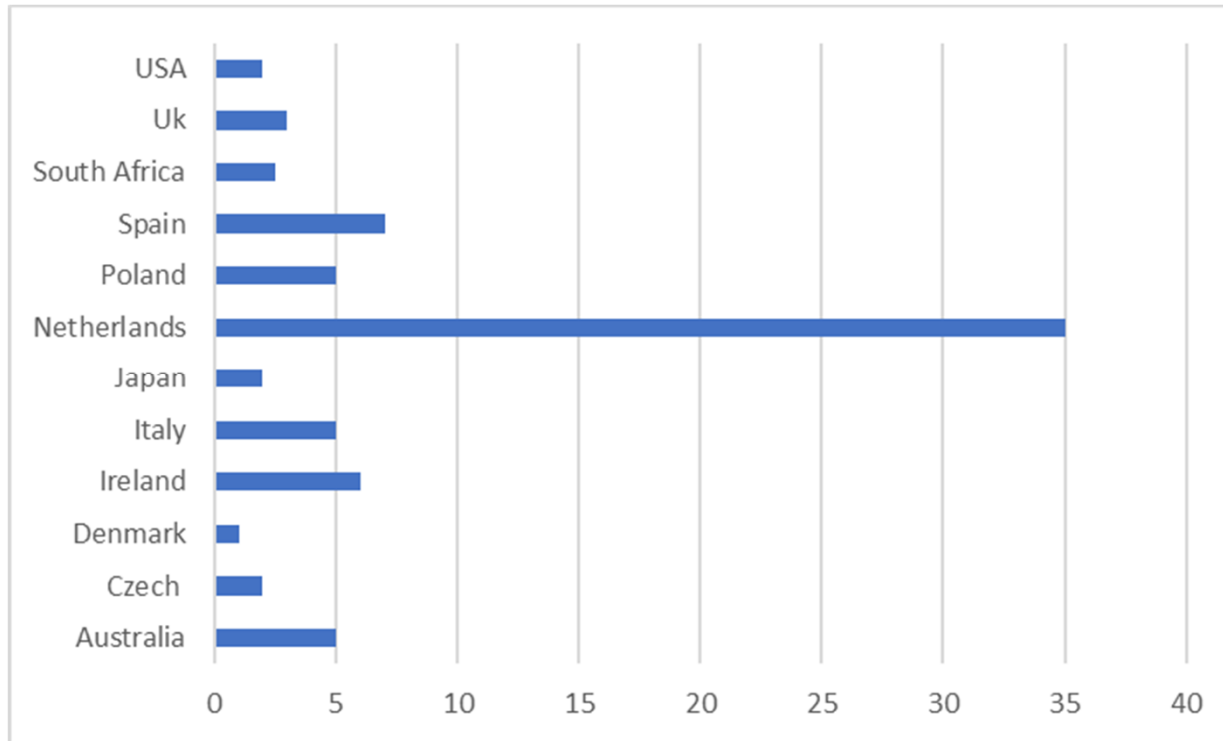
High: €29,99 (Ireland)

Low: €6,00 (Italy)



Internet Sales

International Average: 6%

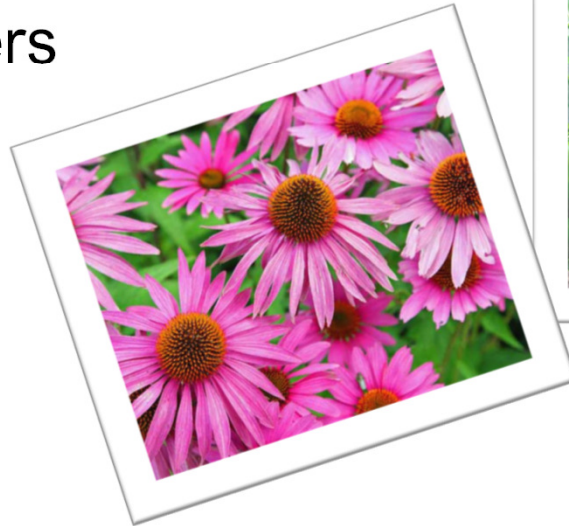


*Products differ from country to country ranging from all garden centre products (including plants) to only hard goods, seeds, plant care products and décor items



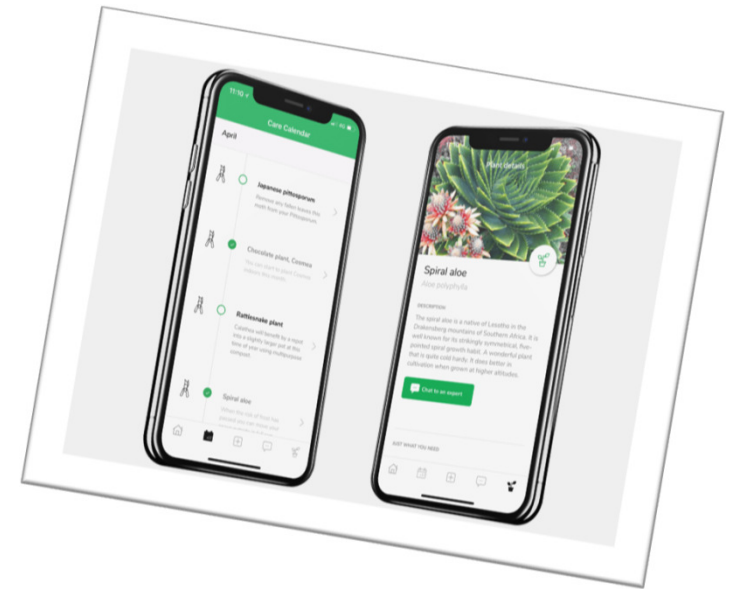
Top Trends in Sales

- Colour
- Vegetables & Herbs (Grow Your Own)
- Indoor & Container Plants
- Perennials
- Pots & Containers
- Organics
- Catering



Top Consumer Marketplace Trends

- Use of technology
- Shop locally/regionally
- Value for money
- Consumers check prices before buying
- Water wise and food gardening
- Focus on environmental awareness, sustainability & biodiversity



Marketing Initiatives

- Social Media
- Promotions & Events
- E-Newsletters
- Magazines
- Community Involvement



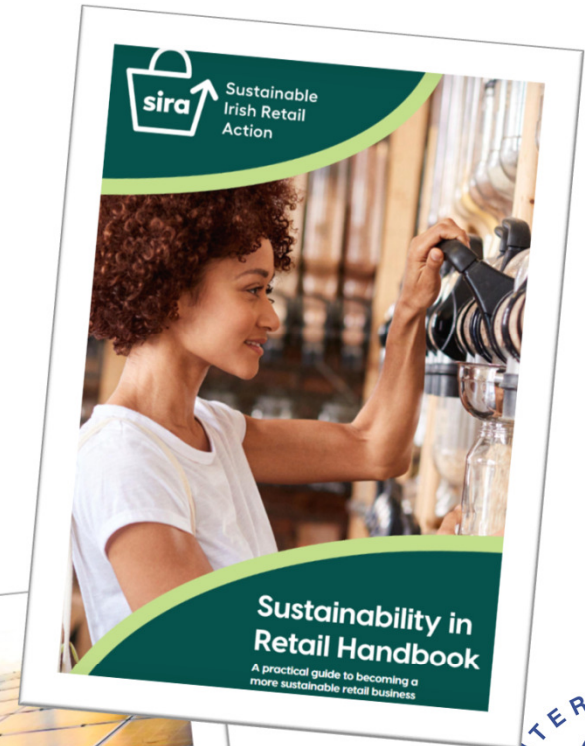
Top Issues

- Weather & environmental factors
- Economy
- Water
- Availability of goods
- Changing consumer behaviour
- Increase in minimum wage
- Recruitment & retention of skilled staff
- Competition from Box stores & supermarket chains



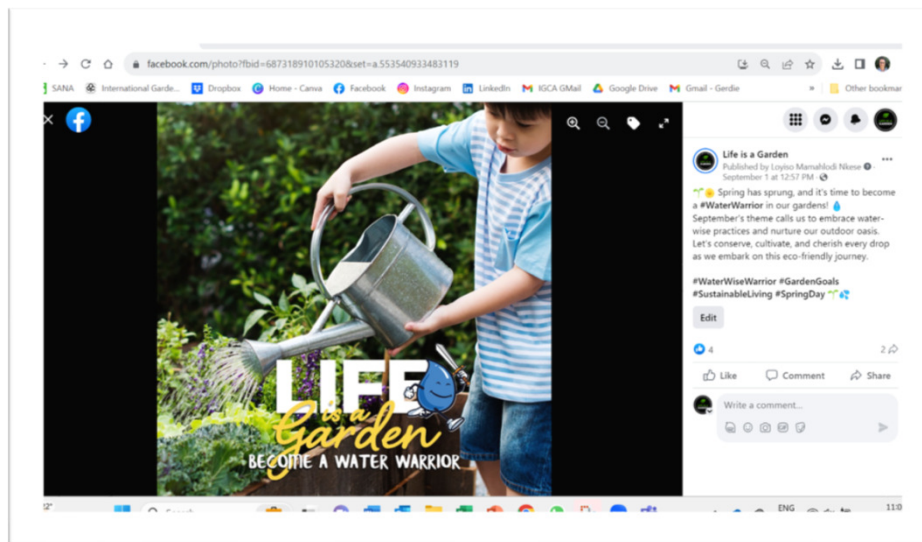
Sustainable practices within garden centres

- Recycling
- Rainwater harvesting
- Implementing water saving techniques
- Installation of solar panels
- Sustainable Guidelines & programmes
- Discontinued use & sale of peat

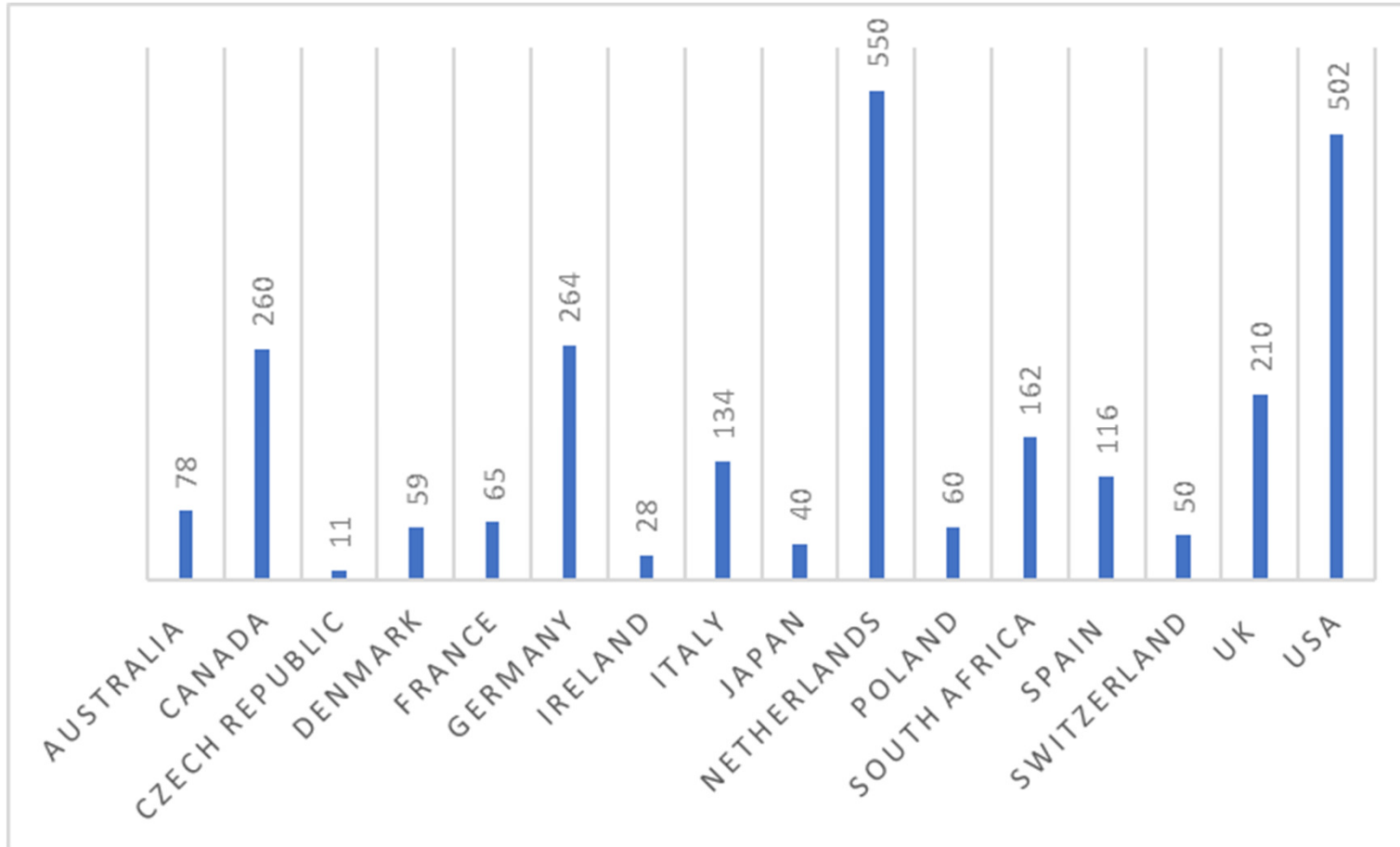


Consumer Education on Sustainability

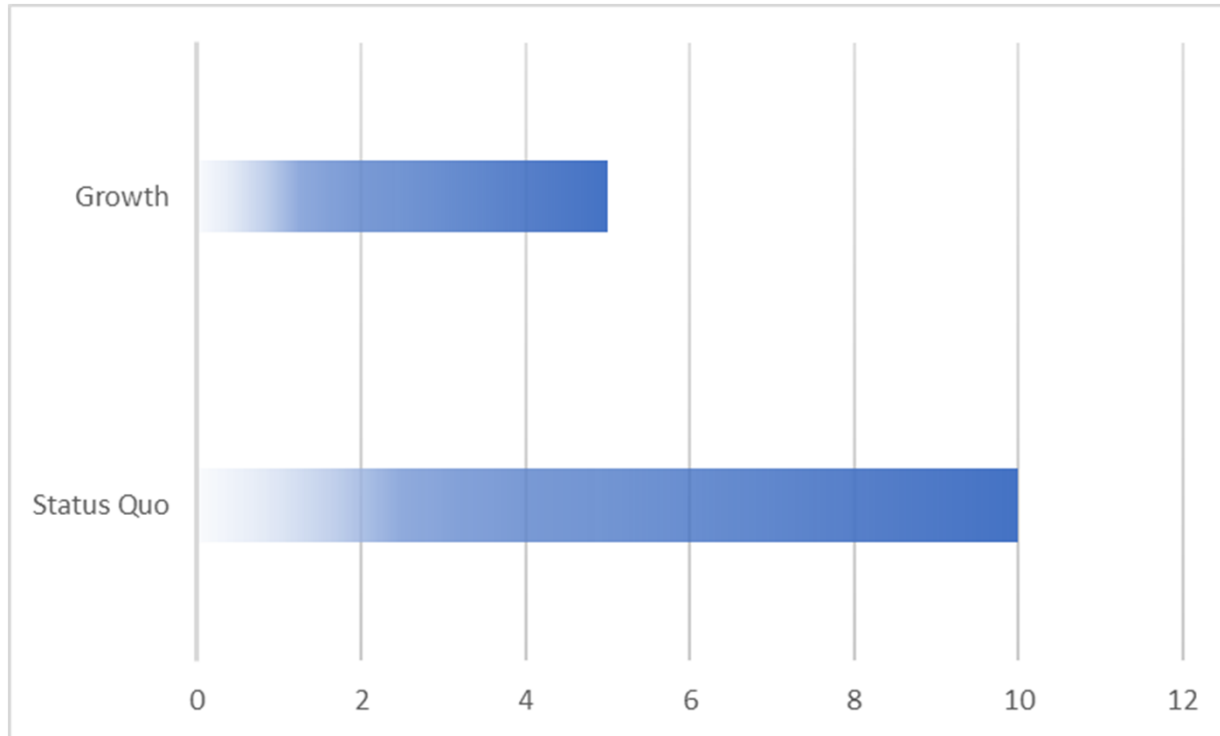
- Workshops
- Newsletters
- Posters to use in-store
- Social media awareness
- Consumer campaigns



Association Membership



Change in Association membership



Status Quo:

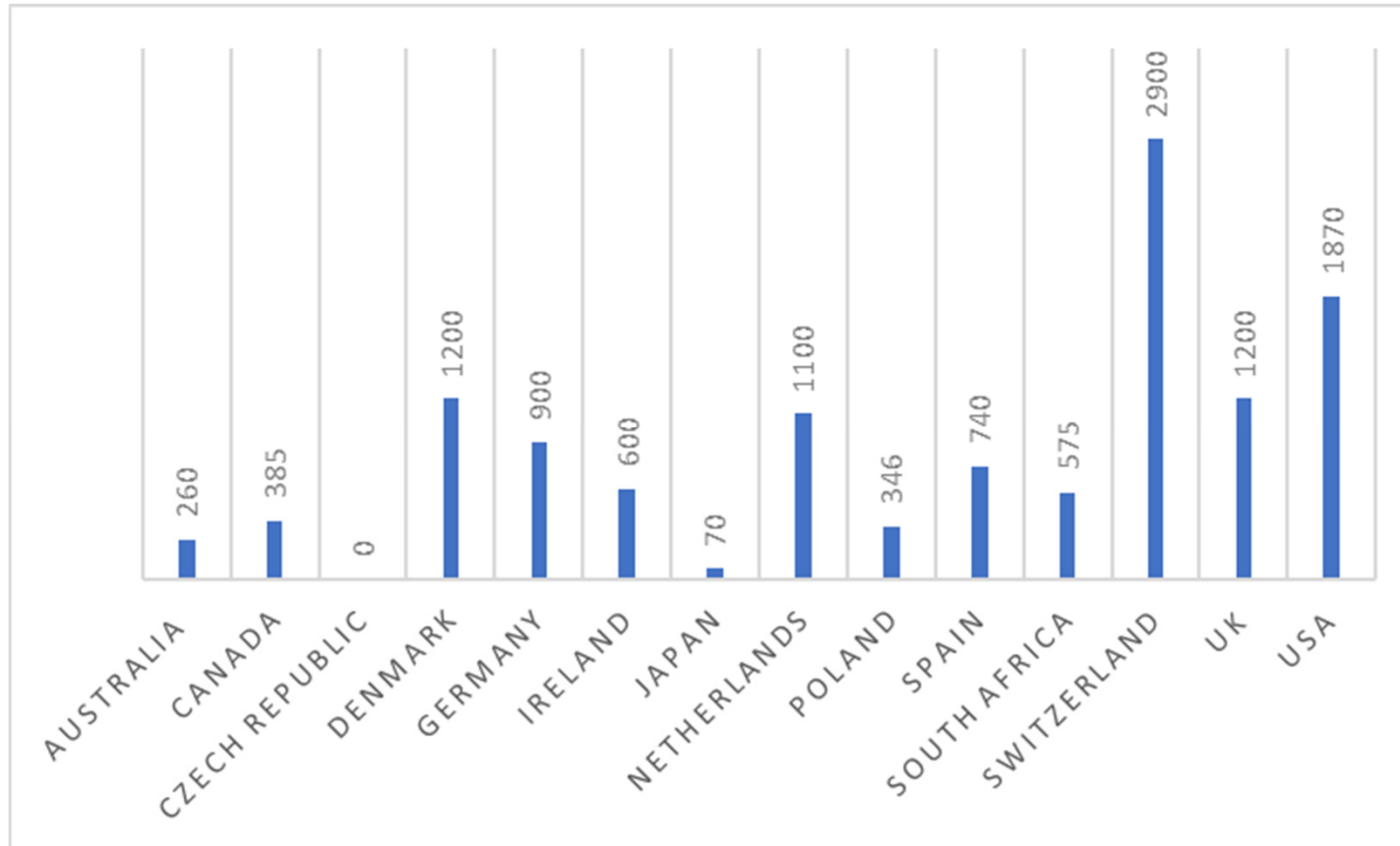
- Australia
- Canada
- Czech Republic
- Denmark
- France
- Ireland
- Poland
- The Netherlands
- South Africa
- Switzerland

Growth:

- Germany
- Italy
- Japan
- Spain
- UK
- USA



Membership Fees



*average fee for garden centre members



Most Successful membership programme

- Australia: Garden Releaf
- Canada: GM truck sales
- Czech Republic: common marketing
- Denmark Haveglæder
- Germany: Annual Winter Conference
- Ireland: Management Development
- Italy: Annual Congress & Autumn Garden Festival
- Japan: Annual Congress
- Poland: Online training
- Spain: Expogarden Congress & Verde ES Vida Magazine
- South Africa: Life is a Garden marketing campaign, seasonal trade fairs
- Switzerland: PR Campaign
- The Netherlands: Market figures, Retail monitor, GS1, climate squares
- UK: E-learning
- USA: Annual conference & Trade Fair, education



Upcoming Congresses

2024

Quebec, Canada
25- 30 August



2025

Cape Town, South Africa
19 – 24 October

