

Top 100 garden centres 2013

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Big corporate garden centres are taking over from retail nurseries and family-run business at the top end of the market, according to the Garden Retail Top 100.

The listing of garden centres by turnover shows a slow move towards a more corporate market, say experts.

The Garden Retail list is the only one of its type in the UK. The 100 centres listed make up almost £700m of the £4bn UK industry. Dobbies has 19 entrants against 12 last time while the Garden Centre Group has 14, up from 10 in 2012. Entry level has risen from £4m to £4.2m.

Quinton Edwards director Simon Quinton Smith said: "The independents can only grow one at a time, so how does anyone else expand? A new Dobbies costs £8m to build so should be in the top 100. Most new centres are only at the £2m mark.

Garden Centre Association (GCA) chief executive Peter Burks added: "There will always be independents and they will always be good because they are owner-occupied and run by someone passionate. They are not necessarily the biggest, but among the best.

"We know the industry is very fragmented so there's every chance over a period of time it will become dominated by one, two or three players like supermarkets were 30 years ago. But I can't see independents disappearing. They can remain strong because they have the support of the GCA."

In early 2010, buoyed by a "best ever" Christmas trading period, Tesco-owned garden centre group Dobbies reiterated its plans to expand from 25 to 100 stores within the next eight years. As we noted at the time, Dobbies' statement was a reminder of the huge changes continuing to take place in the garden industry with significant and permanent implications for competitors and suppliers alike.

With access to the kinds of funds that independent players could only dream of even in the best of economic times, and economies of scale to die for, there were, we said, unlikely to be too many obstacles in this particular juggernaut's path. Three years on, our exclusive Garden Retail report listing the top 100 garden centres by turnover in the UK has mapped just how far those changes have gone - and not just at the hands of one hungry corporate player.

As the latest listing reveals, Dobbies now owns 19 of the 100 largest-turnover garden centres in the UK, up from 12 last year, while Garden Centre Group now owns 14, up from 10. We have yet to see what impact, if any, Tesco's profit fall will have on future developments, but what's for sure, at the very top of the garden retail market the march of the corporates will go on.

For the mass of small-scale garden centres at the base of the garden industry pyramid whose strength comes from their niche position, highly personal service and local branding that corporate players can never replicate, the changes at the top of the supply chain will have less immediate significance.

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But for those in the middle, the challenges they bring will be more keenly felt, and more quickly, and the need to build on natural advantages such as their close contact with their local community, local supply chains and more will be ever more pressing as the march goes on.

Garden Retail's latest listing brings an exclusive update on garden centres' performance over the past 12 months, Matthew Appleby reports.

For the fifth year, Garden Retail has undertaken the task of listing the top 100 garden centres by turnover in the UK. This year, the figures have been updated with additional information from Companies House or the companies themselves.



Longacres Nursery - image: LN

1. LONGACRES NURSERY

Bagshot, Surrey - £16m (2011: £16m)

Longacres Nursery was the Garden Retail Awards best garden centre rebuild in 2012. The owner is Nigel Long, whose father, Peter, bought the site more than 30 years ago. It features a restaurant, food hall, butchers and delicatessen.

Figures: Longacres Nursery

2. SCOTSDALES GARDEN CENTRE

Cambridge - £14.878m (2011: £14.4m)

Another Garden Retail Awards winner, the family garden centre run by Caroline Owen has served Cambridge and district gardeners for more than 40 years.

Figures: Companies House

3. WEBBS

Wychbold, Worcestershire - £14.045m (2011: £13.4m)

The centre is now run by Ed Webb and includes the former Hurrans site in West Hagley (May 2009) as well as the Garden Organic shop at Ryton in the Webbs stable.

Figures: Companies House/GR estimate

4. BENTS

Glazebury, Cheshire - £13.899m (2011: £12.4m)

Cheshire garden centre run by Matthew Bent along with other members of the Bent family.

Figures: Companies House

5. BARTON GRANGE

Preston, Lancashire - £12m (2011: £11.5m)

Owned by the Toppings, this £15m garden centre situated by a canal in Brock, near Preston, was opened by Princess Anne in 2008, replacing a previous store that was 2km further down the road.

Figures: Barton Grange

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6. CADBURY GARDEN & LEISURE

Bristol - £11.8m (2011: £11.9m)

Annual group turnover for Garden & Leisure was £40.3m in 2011. Neville Prest is chief executive and Carol Paris is buying head at the seven Garden & Leisure centres.

Figures: Garden & Leisure

7. POLHILL GARDEN CENTRE

Sevenoaks, Kent - £11.78m (2011: £11.413)

Owned by the Novells and situated in Sevenoaks, Kent, the garden centre has now been established for more than 30 years.

Figures: Companies House

8. VAN HAGE

Great Amwell, Hertfordshire - £11.64m (2011: £10.6m)

This is Van Hage's flagship site. Chris Roberts runs the company and Martin Taylor is retail director.

Figures: Van Hage

9. WOODCOTE GREEN NURSERIES

Wallington, Surrey - £11.068m (2011: £10.1m)

Owned by Chris Milan. Phil Barnden is general manager.

Figures: Companies House

10= BURFORD GARDEN COMPANY

Oxfordshire - £10m (2011: £10m)

Nigel Johnson founded this Cotswolds-based high-end centre in the 1980s. Paul Gingell is managing director.

Figures: Burford Garden Company

10= OTTER NURSERIES

Ottery St Mary, Devon - £10m (2011: £10m)

Group turnover was £15.279m at December 2011, up from £13.815m. Founder Malcolm White and the group's directors are family members. Outlets in Plymouth, Torquay and Wincanton.

Figures: GR estimate

12. ENDSLEIGH GARDEN & LEISURE

Ivybridge, Devon - £9.8m (2011: £9.9m)

This is a destination centre set in mid Devon. It is one of the seven-strong, French-owned Garden & Leisure group.

Figures: Garden & Leisure

13= DOBBIES GARDEN WORLD

Edinburgh - £9.6m (2011: £11m)

Dobbies' annual group sales were up to £136m in February 2012. James Barnes is chief executive at the 32-centre chain bought by Tesco in 2007. Centres planned in York, Kings Lynn and Harrogate.

Figures: Dobbies

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13= CROCUS

Online - £9.6m (2011: £9.061m)

Dedicated online garden centre run by Mark Fane and Peter Clay.

Figures: Crocus.

15. GARSONS

Esher, Surrey - £9.4m (2011: £8.7m)

This is a crossover farm shop/pick your own/garden centre. The current directors are Derek and his son Ian Richardson, with Peter and Bob Thompson.

Figures: Garsons

16. ALTON GARDEN CENTRE

Essex - £9.3m (2011: £9m)

Owner Derek Bunker founded this Essex centre in 1971 and now employs 11 members of his extended family among the staff. Bunker's son, Andy, is a mainstay in the Tillington buying group set-up.

Figures: Alton Garden Centre

17. BRIDGEMERE NURSERY & GARDEN WORLD

Cheshire - £9.083m (2011: £8m)

Bridgemere Nursery & Garden World was bought by the then Wyevale from John Ravenscroft in 2006 for £15m.

Figures: Garden Centre Group

18. HASKINS GARDEN CENTRE

Ferndown, Dorset - £9m (2011: £8.4m)

Managing director is Julian Winfield. Benefits from a £2.5m restaurant.

Figures: Haskins

19. HUNTINGDON GARDEN & LEISURE

Cambridgeshire - £8.9m (2011: £9m)

Store opened in 2002 and occupies a site covering 8ha.

Figures: Garden & Leisure

20. CHESSINGTON GARDEN CENTRE

Surrey - £8.8m (2011: £7.492m)

Run by Jolyon Martin and recently improved with a bigger catering side.

Figures: Companies House

21. HASKINS ROUNDSTONE

West Sussex - £8.6m (2011: £5.9m)

Garden Centre Association (GCA) award-winning store.

Figures: Haskins

22. BLUE DIAMOND TRENTHAM

Staffordshire - £8.53m (2011: £8.53m)

Overall Blue Diamond group turnover was £36.9m in year to December 2011.

Figures: Blue Diamond

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23. BICESTER GARDEN CENTRE

Oxfordshire - £8.411m (2011: £7m)

Revamped in 2013 after beginning in 1976 as a nursery. Bought by Blooms of Bressingham in 2000.

Figures: Garden Centre Group

24. HAYES GARDEN WORLD

Ambleside, Cumbria - £8.32m (2011: £8.4m)

Recently underwent a Malcolm Scott Consultants redevelopment. Managed by Keith Laird.

Figures: Companies House

25. STEWARTS GARDENLANDS

Christchurch, Dorset - £8.028m (2011: £6m)

Annual turnover is £9.7m for Stewarts, which has two south coast centres. Martin Stewart has been managing director since 1982.

Figures: Stewarts Gardenlands

26. WHITEHALL GARDEN CENTRE

Wiltshire - £8m (2011: £8m)

The Lacock site turnover is around £8m while Whitchurch (Bristol) is about 1.7m, with overall turnover at £9.775m. The Self family runs the centres. Part of Tillington buying group with the likes of Squire's, Otter and Van Hage.

Figures: GR estimate

27. HEIGHLEY GATE NURSERY & GARDEN CENTRE

Morpeth, Northumberland - £7.669m (2011: £8.5m)

David Lishman established this centre in 1963 and sold it to Wyevale in 2008.

Figures: Garden Centre Group

28. HASKINS WEST END

Southampton - £7.5m (2011: £6.9m)

Turning over £30m at its four centres under managing director Julian Winfield and buying head Conna Powles.

Figures: Haskins

29. BRIGG GARDEN CENTRE

Lincolnshire - £7.4m (2011: £7.6m)

Owned by Charles and Robert Stubbs. The British Garden Centres label now owns Brigg and Woodthorpe in Lincolnshire, Arcadia in Middlesbrough, Spring in Hornsea and Yorkshire Garden Centre, plus Townley in Lancashire.

Figures: British Garden Centres

30. WOODLANDS NURSERY & GARDEN CENTRE

Leicestershire - £7.387m (2011: £8.5m)

Wyevale bought this destination garden centre and nursery for £9.65m in 2002.

Figures: Garden Centre Group

31. FOREST LODGE

Farnham, Surrey - £7.38m (2011: £7.4m)

The Forest Lodge centre is run by the Head family under the Denys E Head company name.

Figures: GR estimate

32. GROSVENOR

Chester - £7.366 (2011: £6.112m)

Run by Blue Diamond since April 2012, with former managing director Iain Wylie now interim chief executive officer at the GCA. Owned by the Duke of Westminster.

Figures: Blue Diamond

33. RUXLEY MANOR

Sidcup, Kent - £7.335m (2011: £7.5m)

Henry Evans founded H Evans & Sons of Longlands Nursery, Sidcup, in 1876. In 1960, the business bought Ruxley Manor Farm and opened a garden centre in 1964. Andrew and James Evans now run the centre.

Figures: Ruxley Manor

34. DOWNTOWN GARDEN CENTRE

Boston, Lincolnshire - £7.3m (2011: £8.3m)

Founded in 2000 as part of a group of the Isaac family's department and furniture stores. Downtown Garden Centre was originally built to complement the site.

Figures: Downtown Garden Centre

35= MELBICKS GARDEN & LEISURE

Birmingham - £7.25m (2011: £7.25m)

One of Garden & Leisure's seven centres.

Figures: Garden & Leisure

35= SQUIRE'S BADSHOT LEA GARDEN CENTRE

West Sussex - £7.25m (2011: £7.25m)

Squire's took over the centre from the Caffyn Parsons family in 2006. Dennis Espley is group managing director.

Figures: Squire's

37. BLUE DIAMOND ST PETERS GARDEN CENTRE

Jersey - £7.218m (2011: £6.68m)

Jersey's biggest centre, owned by Guernsey-based Blue Diamond. Turnover of £36.9m across 14 centres.

Figures: Blue Diamond

38. WORLD'S END GARDEN CENTRE

Wendover, Buckinghamshire - £7.085m (2011: £6.5m)

World's End was bought from Economic Forestry Group in 1995. The late Jim Bone and Len Bone founded the centre in 1970, selling to EFG in 1985.

Figures: Garden Centre Group

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39= GORDALE NURSERY & GARDEN CENTRE

Merseyside - £7m (2011: £8.38m)

Run by the Nicholson family.

Figures: Gordale Nursery & Garden Centre

39= FROSTS AT WOBURN SANDS

Milton Keynes - £7m (2011: £7m)

Run by the Frost family - Jeremy, Rupert and James. Group turnover was £28.779m in the year to July 2011.

Figures: GR estimate

41. AYLETT NURSERIES

St Albans, Hertfordshire - £6.9m (2011: £6.8m)

Aylett is more than 50 years old and is now run by Adam Wigglesworth.

Figures: Companies House

42. BLUE DIAMOND LE FRIQUET

Guernsey - £6.763m (2011: £6.575m)

A doughnut-shaped garden centre on the Channel Islands that opened in 2009.

Figures: Blue Diamond

43. PERRYWOOD GARDEN CENTRE

Essex - £6.66m (2011: £4.55m)

Garden centre and nursery run by Alan, Karin and their son Simon Bourne.

Figures: Perrywood Garden Centre

44 DOBBIES GARDEN WORLD

Aberdeen - £6.6m

Garden centre opened in 2010.

Figures: Dobbies

45. SANDERS GARDEN WORLD

Somerset - £6.59m (2011: £6.27m)

Sir Tom Hunter bought the Sanders site for Wyevale in 2007. It was previously owned by Chris and Mike Sanders and Michelle and Kerry Michael.

Figures: Garden Centre Group

46. SQUIRE'S TWICKENHAM GARDEN CENTRE

Middlesex - £6.55m (2011: £6.55m)

Colin Squire still chairs the family-owned 14-centre group. Head of buying at the group is Darran Oakley.

Figures: Squire's

47. HOLLYBUSH GARDEN CENTRE

Wolverhampton - £6.4m (2011: £6.9m)

Hollybush Nurseries was established in 1982 as an independent garden centre, family owned and run. It employs 50 full-time and 60 part-time staff, with 12 other businesses on site.

Figures: Hollybush Garden Centre

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48. GARDEN PRIDE

Ditchling, West Sussex - £6.3m (2011: £4.6m)

Owner Trevor Wenham is also a director at Choice Marketing.

Figures: Garden Pride

49. GORDON RIGG

Todmorden - £6.15m (2011: £6.25m)

Overall net turnover from Gordon Rigg's Todmorden and Rochdale sites was £9.285m in the year to July 2011, down from £9.5m, with Todmorden pulling in around £6.15m and Rochdale £3.15m.

Figures: Gordon Rigg

50. BAYTREE NURSERIES

Lincolnshire - £6.1m (2011: £6.1m)

Baytree was founded and run by plantsman Reinhard Biehler.

Figures: GR estimate

51= HASKINS SNOWHILL

West Sussex -£5.9m (2011: £5.23m)

Garden Centre on Snowhill Lane.

Figures: Haskins

51= DOBBIES GARDEN WORLD

Gillingham - £5.9m

A new garden centre in 2012.

Figures: Dobbies

53= DOBBIES GARDEN WORLD

Stirling - £5.7m (2011: £6m)

Garden centre located on Drip Road in Craigforth.

Figures: Dobbies

53= DOBBIES GARDEN WORLD

Ayr - £5.7m (2011: £6m)

Dobbies branch that opened in March 2004.

Figures: Dobbies

55. BLUE DIAMOND DERBY GARDEN CENTRE

Derbyshire - £5.45m (2011: £4.587m)

Bought as a freehold from Gardens of Excellence Group in April 2008.

Figures: Blue Diamond

56. BLUE DIAMOND EVESHAM GARDEN CENTRE

Worcestershire - £5.453m (2011: £4.388m)

Garden centre set in Evesham Country Park.

Figures: Blue Diamond

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57= WENTWORTH GARDEN CENTRE

South Yorkshire - £5.4m (2011: £4.62m)

Occupies a 6.4ha site in an historic conservation village.

Figures: Wentworth Garden Centre

57= DOBBIES LISBURN

Northern Ireland - £5.4m

Store opened in 2010.

Figures: Dobbies

59. NOTCUTTS WOODFORD PARK

Cheshire - £5.338m (2011: £5.73m)

Notcutts bought the site in 2008 as part of £14.5m acquisition of six centres.

Figures: Notcutts

60. PETER BARRATT'S STOCKTON

Stockton-on-Tees - £5.309m (2011: £7.2m)

Buying this branch of Barratt's took Wyevale's late-2007 spending to £50m.

Figures: Garden Centre Group

61. PETER BARRATT'S GOSFORTH

Newcastle upon Tyne - £5.302m (2011: £7m)

Wyevale bought Peter Barratt's freehold stores in Gosforth and Stockton-on-Tees in September 2007.

Figures: Garden Centre Group

62. DOBBIES GARDEN WORLD

Dunfermline - £5.3m (2011: £7m)

Previous figures were a GR estimate.

Figures: Dobbies

63= DOBBIES GARDEN WORLD

Milngavie - £5.2m

Garden centre in East Dunbartonshire.

Figures: Dobbies

63= DOBBIES GARDEN WORLD

Chesterfield - £5.2m (2011: £5m)

The 5,000sq m Dobbies is an anchor for a 9,000sq m retail complex on a 5ha site.

Figures: Dobbies

65= DOBBIES GARDEN WORLD

Braehead - £5.1m

Store opened in 2011.

Figures: Dobbies

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65= DOBBIES GARDEN WORLD

Livingston - £5.1m

Store opened in 2011.

Figures: Dobbies

67. PARADISE PARK

East Sussex - £5.1m (2011: £4.7m)

One of Tates of Sussex's three centres. Jonathan Tate is managing director.

Figures: Paradise Park

68= RAEMOIR GARDEN CENTRE

Aberdeenshire - £5m

Centre with gift shop and restaurant.

Figures: GR estimate

68= DOBBIES GARDEN WORLD

Ashford - £5m

Garden centre opened in 2011.

Figures: Dobbies

68= MONKTON ELM GARDEN & PET CENTRE

Taunton, Somerset - £5m (2011: £5.55m)

Bought by David and Luella Bellman in 1978. Son-in-law Mike Lind is now managing director.

Figures: Monkton Elm Garden & Pet Centre

68= SECRETTS

Milford, Surrey - £5m - A recalculation excluding Secretts' non-garden centre business.

Figures: GR estimate

72. REDFIELDS

Fleet, Hampshire - £4.903m (2011: £4.218m)

Sold by the Goater family to Blue Diamond in 2010.

Figures: Blue Diamond

73= MILLETS FARM

West Oxfordshire - £4.9m (2011: £4.9m)

Family farm owned by brothers Nigel and Tony Carter before being sold to Frosts.

Figures: GR estimate

73= RHS WISLEY PLANT CENTRE

Surrey - £4.9m (2011: £5m)

RHS retail head is Will Havercroft. Nigel Eaton runs the centre.

Figures: RHS

73= DOBBIES GARDEN WORLD

Cirencester - £4.9m (2011: £5m)

Another branch in the Dobbies chain.

Figures: Dobbies

76. BLOOMS GLOUCESTER GARDEN CENTRE

Gloucestershire - £4.891m (2011: £6m)

New building opened in 2005.

Figures: Garden Centre Group

77. BLUE DIAMOND BRAMBRIDGE PARK GARDEN CENTRE

Eastleigh, Hampshire - £4.811 (2011: £4m)

Set among themed gardens.

Figures: Blue Diamond

78. DOBBIES GARDEN WORLD

Dundee - £4.8m (2011: £5m)

Purpose-built destination next to seven-shop outlet Angus Gateway.

Figures: Dobbies

79. POPLARS NURSERY GARDEN CENTRE

Bedfordshire - £4.788m (2011: £4.44m)

Run by David Little.

Figures: Companies House

80. COOLINGS GARDEN CENTRE

Knockholt, Kent - £4.726m (2011: £5.1m)

Paul Cooling is chairman. Celebrating its centenary this year.

Figures: Coolings Garden Centre

81= DOBBIES GARDEN WORLD

Milton Keynes - £4.7m (2011: £7m)

Previous figures were a GR estimate.

Figures: Dobbies

81= STEPHEN H SMITH

Otley, West Yorkshire - £4.7m (2011: £4.7m)

Largest of a four-centre chain.

Figures: GR estimate

81= DOBBIES GARDEN WORLD

Atherstone - £4.7m (2011: £6m)

Turnover has been recalculated.

Figures: Dobbies

81= BURSTON ROSE & GARDEN CENTRE

St Albans - £4.7m (2011: £4.7m)

Carole Goodchild is managing director.

Figures: GR estimate

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81= TRAGO MILLS

Newton Abbot, Devon - £4.7m (2011: £4.7m)

Part of a huge retail destination in Devon.

Figures: GR estimate

86. NORTHAMPTON GARDEN CENTRE

Northamptonshire - £4.699m (2011: £4.64m)

One of the original 13 Wyevalles.

Figures: Garden Centre Group

87. WYEVALE SWANSEA GARDEN CENTRE

West Glamorgan - £4.533m

Located in Llamsamlet Enterprise Park.

Figures: Garden Centre Group

88= VAN HAGE

Peterborough - £4.5m (2011: £4.5m)

State-of-the-art centre from Garden Park Investments anchoring other retail units.

Figures: Van Hage

88= BOURNE END GARDEN CENTRE (FLOWERLAND)

Buckinghamshire - £4.5m (2011: £4m)

Sister site to Iver Flowerland.

Figures: GR estimate

88= ST PETERS GARDEN CENTRE

Worcester - £4.5m (2011: £4.2m)

Owned by Tony Blake.

Figures: St Peters Garden Centre

91. NOTCUTTS NORWICH

Norfolk - £4.42m (2011: £4.67m)

Managed by Steve Boon.

Figures: Notcutts

92. NOTCUTTS MAIDSTONE

Kent - £4.38m (2011: £4.585m)

The centre is the focal point of Newnham Court Shopping Village.

Figures: Notcutts

93. HOUGHTON HALL GARDEN CENTRE

Cumbria - £4.32m (2011: £5.5m)

Klondyke runs 26 centres. Bob Hewitt is managing director, David Yardley is operations head and David Abbott is head buyer.

Figures: Klondyke

94. OLD BARN NURSERY & GARDEN CENTRE

Horsham, West Sussex - £4.232m

Managed by Mig Ammolla.

Figures: Garden Centre Group

95. BLOOMS RUGBY GARDEN CENTRE

Warwickshire - £4.275m (2011: £4.6m)

The centre was built on land formerly owned by Jeffrey Bernhard.

Figures: Garden Centre Group

96= WYEVALE WOODBRIDGE GARDEN CENTRE

Suffolk - £4.251m (2011: £4.2m)

Site bought from Douglas Goldsmith.

Figures: Garden Centre Group

96= DOBBIES GARDEN WORLD

Ponteland - £4.2m (2011: £5m)

Increased to 4,500sq m in 2005 rebuild.

Figures: Dobbies

96= PLANTERS GARDEN CENTRE

Tamworth, Staffordshire - £4.2m (2011: £4.3m)

Owned by Gerard Ingram, Planters also includes other stores in the Midlands.

Figures: Planters Garden Centres

96= DOBBIES GARDEN WORLD

Peterborough - £4.2m

Garden centre opened in 2011.

Figures: Dobbies

96= DOBBIES GARDEN WORLD

Liverpool - £4.2m

Store opened in 2011.

Figures: Dobbies

96= GATES NURSERIES

Leicestershire - £4.2m (2011: £4.2m)

Built in the former Cold Overton Hall.

Figures: GR estimate

96= BURLEYDAM

Merseyside - £4.2m (2011: £4.2m)

Part of the EH Williams group. Managed by Sally and Adrian Cornelissen.

Figures: GR estimate