

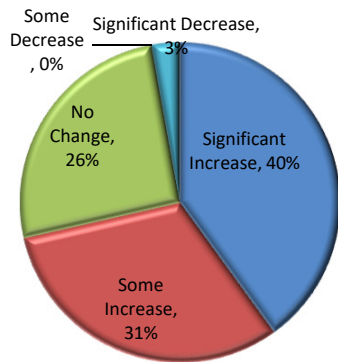
Barometer of Trade

For first 6 Months of 2018

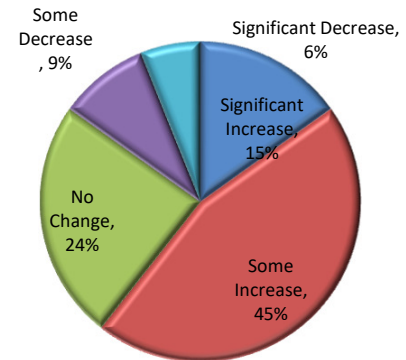
	2015	2016	2017	Jan-Jun 2018
<i>No of submissions</i>	54	29	36	37
STAFF				
Average No. of Staff in each organisation (Full-Time)	66	51	53	69
Total No. of Staff across all respondents (Full-Time)	3,505	1,472	1,898	2,554
Average No. of Staff in each organisation (Seasonal)		38	25	26
Total No. of Staff across all respondents (Seasonal)		1,089	900	977

	2015	2016	2017	Jan-Jun 2018
MOOD BAROMETER <i>Opinions of likely sales BY VALUE</i>				
Significant Increase <i>By more than 5%</i>	42%	31%	40%	15%
Some Increase <i>Less than 5%</i>	45%	48%	31%	45%
No Change	11%	17%	26%	24%
Some Decrease <i>Less than 5%</i>	2%	3%	0%	9%
Significant Decrease <i>By more than 5%</i>	0%	0%	3%	6%

Mood Barometer 2017 by VALUE

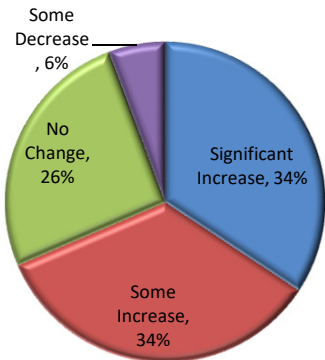


Mood Barometer 2018 by VALUE

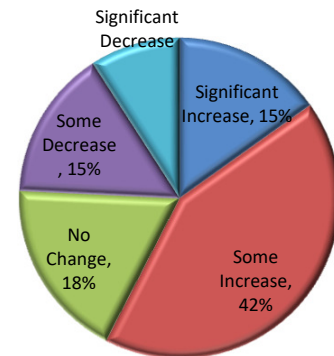


	2016	2017	Jan-Jun 2018
MOOD BAROMETER <i>Opinions of likely sales over the next year BY VOLUME</i>			
Significant Increase <i>By more than 5%</i>	30%	34%	15%
Some Increase <i>Less than 5%</i>	44%	34%	42%
No Change	19%	26%	18%
Some Decrease <i>Less than 5%</i>	7%	6%	15%
Significant Decrease <i>By more than 5%</i>	0%	0%	9%

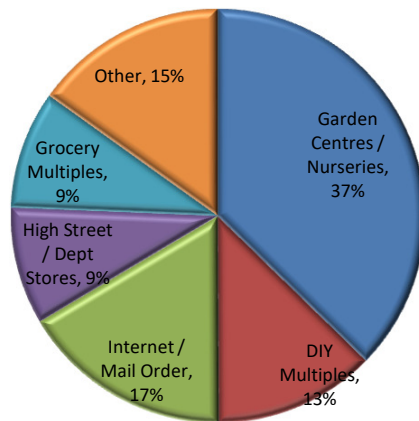
Mood Barometer 2017 by VOLUME



Mood Barometer 2018 by VOLUME



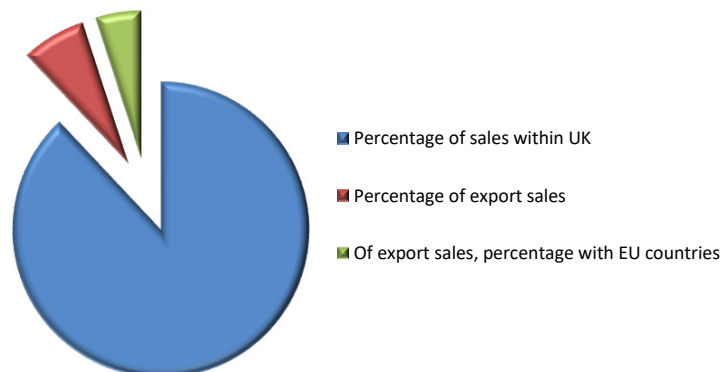
DISTRIBUTION CHANNELS	2015	2016	2017	Jan-Jun 2018
Garden Centres / Nurseries	34%	37%	42%	37%
DIY Multiples	15%	24%	13%	13%
Internet / Mail Order	16%	13%	16%	17%
High Street / Dept Stores	12%	5%	6%	9%
Grocery Multiples	6%	7%	6%	9%
Other	17%	14%	17%	15%



Breakdown Of Distribution Channels 2018

TURNOVER	2015	2016	2017	Jan-Jun 2018
<i>No of submissions</i>	54	29	36	37
Average Turnover per organisation	£8,749,000	£9,918,897	£12,282,056	£6,958,470
Total Turnover	£437,452,000	£287,648,000	£442,154,000	£257,463,386
<i>Total Turnover Pro-Rata * (54/29) or (54/36) etc</i>	£437,452,000	£535,620,414	£663,231,000	£375,757,374

IMPORT/EXPORT	2016	2017	Jan-Jun 2018
Percentage of sales within UK	90%	91%	91%
Percentage of export sales	10%	9%	9%
<i>Of export sales, percentage with EU countries</i>	40%	41%	41%



	2016	2017	Jan-Jun 2018
European Union & Rest of the World			
Net importer of goods/services with the EU	76%	71%	71%
Net exporter of goods/services with the EU	24%	29%	29%
Net importer of goods/services with the Rest of the World	86%	83%	89%
Net exporter of goods/services with the Rest of the World	14%	17%	11%

	2016	2017	Jan-Jun 2018
Are you a Manufacturer or an Importer?			
Manufacturer	17%	23%	31%
Importer	45%	40%	38%
Both	38%	37%	31%

	2016	2017	Jan-Jun 2018
If you are a manufacturer is this in the UK, EU or elsewhere?			
UK	56%	68%	67%
EU	6%	14%	5%
Elsewhere	6%	5%	5%
Combination of regions	31%	14%	24%

COST BASE	How has your cost base changed over the last 6 months?	2016	2017	Jan-Jun 2018
	Raw Materials	+7.65%	+8.91%	+6.91%
	Energy	+3.29%	+3.26%	+2.31%
	Labour	+4.40%	+3.97%	+4.17%
	Haulage	+3.96%	+4.18%	+3.60%
	Freight	+5.21%	+4.27%	+2.71%
	Purchased Goods FOB Rates	+7.74%	+6.15%	+3.77%
	Purchased Goods Landed Rates	+8.59%	+6.94%	+2.64%