Firewood, Fencing & Furniture in the East of England

A Report Prepared for the Forestry Commission

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TABLE OF CONTENTS

INTRODUCTION

This report has been prepared for the Forestry Commission by Intermark to provide market data regarding the trends in demand for wood products sold in the East Anglia region of England.

The principal objective of the project was to measure change in the market size for wood products sold through selected types of outlets in Eastern England. The focus of the study has been on:

- range of products sold by type of outlet
- volumes sold by type of outlet
- sources of supply (local, UK, imported)
- influences upon purchasing decisions especially preferences for or importance of: British produce, local produce and "green" products.

The new survey will provide an indication of trends since 1994 and allow the Forestry Commission executives to gauge the changing potential for home grown timber.

Compared with 1994, two further counties of Eastern England have been included, namely Bedfordshire and Hertfordshire. Essex, Suffolk, Norfolk and Cambridgeshire make up the six counties. The pre-selected outlets were:

- farm shops
- garage forecourts
- garden centres
- DIY stores with gardening/horticultural departments.

METHOD OF RESEARCH

The results of the investigation have been based upon the original research from 1994 and a new set of interviews and shop observations carried out from January to March 2002 across six counties.

Apart from the three main outlets, product audits were also carried out at a number of DIY sheds and stores across the region.

Type of Outlet	Total Interviews
Garden centres	38
Garage forecourts	35
Farm shops	20
DIY Stores	18
Total	**111**

A further 40 visits were made to garages and farm shops which did not stock wood products at that time.

Approximately 40% of the interviews with garden centres were carried out with outlets visited in 1993/4. This has in effect enabled us to provide a direct comparison with stock and prices recorded then and the changes that have taken place and offers a relatively high degree of confidence in the calculations and product commentary.

Further desk research was carried out by reference to available published and Internet data (web pages, etc.) concerning garden centre chains, gardening products and suppliers. Finally, it was possible to speak with a number of product suppliers to ascertain their regional sales and trends.

EXECUTIVE SUMMARY

1. The research shows that sales of all wooden products in the three types of outlet in the four counties of East Anglia have increased from £9.7 million in 1994 to £17.9 million in 2001. The total market size including the two additional counties of Hertfordshire and Bedfordshire was £23.7 million.

Not included in this market estimate are sales of wooden products through hardware stores, village shops, department stores, mail order and small DIY stores.

The number of garden centres and DIY sheds in the region has increased from 204 to 235, and coupled with this has been a growth in the size of individual outlets, enabling more products to be stocked than in 1994. This has put pressure on the smaller outlets which find it increasingly difficult to compete with the growing medium and large sized centres.

The number of farm shops, however, has not changed greatly and the research revealed a tendency for these outlets to decrease the amount of products they carry principally because of the increased competition from the garden centres. This leaves the farm shops more able to concentrate on selling produce.

Garage forecourts were found to concentrate on fuel wood with very few outlets holding a diversified wooden product range. Sales of the major fuelwood products have increased but the value of charcoal sales has not because the average price of charcoal has fallen since 1994.

Market Value at Retail Prices - £000 1994 to 2001

4 Original Counties	Total		Garden Centres/ DIY Sheds		Garage Forecourts		Farm Shops	
	1994	2001	1994	2001	1994	2001	1994	2001
Fencing/trellis	1924	4108	1924	4096	-	-	-	12
Hardwood furniture	724	3493	716	3470	-	-	8	15
Softwood furniture	289	790	263	772	11	10	15	8
Tubs/Planters	310	927	365	914	24	-	13	13
Bird tables/boxes	235	311	196	296	16	-	23	15
Bark	605	673	605	672	-	-	-	1
Charcoal	2141	2077	160	184	1976	1890	6	3
Fuel wood/kindling	3275	5037	-	-	3272	5020	3	17
Stakes	35	60	35	60	-	-	-	-
Others	218	427	116	380	-	40	10	15
Total	**9756**	**17903**	**4380**	**10844**	**5298**	**6960**	**78**	**99**
Herts and Beds	**-**	5823	-	3906	-	1873	-	44
Grand Total		**23726**		**14750**		**8833**		**153**

The market in the original four counties has grown in value at 9.1% per annum from 1994 to 2001; an additional £8 million in seven years. The increase in wood material used has been significant. The largest growth has been seen in sales of fencing products, furniture, planters and a range of new products not previously available.

- Sales through garden centres grew at 13.8%/per annum
- Sales through garage forecourts grew at 4%/per annum
- Sales though farm shops grew at 3%/per annum

2. Individual products that have shown real growth throughout the period come mainly through garden centres and DIY sheds. These are reported as:

- **softwood fencing and trellis** (11% per annum). The main volume products in fencing are still traditional lap and featheredge fencing and trellis but there has been a growth in supply and demand for more substantial softwood fencing products, e.g. Forest Fencing's *Europa* range, picket fencing and willow fencing, which in the form of panels and hurdles has grown rapidly in the last four/five years. Sales of pergolas and arches has also increased;
- **hardwood furniture** (25% per annum). Teak and Iroko dominate the market by value but there is an increasing demand for mid-priced hardwood furniture made from eucalyptus. Hardwood furniture is one of the key 'aspiration' purchases made for the garden and prospects for growth continue to be very good;
- **softwood furniture** (15% per annum) principally though using imported pine
- **tubs and planters** (17% per annum). Softwood planters are now a widely stocked item available in a wide range of sizes and colours. There is still a steady demand for hardwood planters;
- new products such as decking, pot trolleys, willow obelisks and woven baskets have grown in value at approximately 12% per annum. Decking was found in more than 50% of garden centres, predominantly softwood decking, but the peak sales for this product were between 1996 and 1999. Many of the garden centres do not now regard it as a mainstream product and expect to see sales grow slowly in the future.

The more established products such as bird tables and boxes, bark, charcoal and stakes have grown at a slower pace, between 2 and 6% per annum. This is the level of growth in mature products

3. UK softwood is still the main raw material for fencing, trellis, bird tables and bark products. In hardwood furniture, the main raw material is tropical hardwood and the research revealed very little UK hardwood products.

In softwood furniture and for planters however there has been a rise in the use of Scandinavian pine, mainly because it can produce a better finish than UK softwood to achieve the look currently in vogue. It is noticeable that 'rustic style' softwood furniture found in 1994 has gone out of fashion.

The most important outlet for UK sourced hardwood is still split log fuel wood sold predominantly through garage forecourts.

4. In 1994, wholesalers such as Gibbs Palmer supplied the majority of wooden and garden products to garden centres. Gibbs Palmer have gone out of business and there have been major changes in distribution since then, with two new major distributors (Gardman and AFK) coming into existence for products such as bird tables and planters. Fencing and furniture is now sourced direct from the manufacturers. Forest Fencing dominates the supply of fencing and related products (including decking) but the sector includes a number of local and foreign suppliers as well, and furniture from a small number of large suppliers (Alexander Rose, Barlow Tyrie, Swan Hattersley and Bridgman).

   The market for low end, rustic style furniture in the garden centres has declined as customer expectations have risen.

   A major factor in the growth of wood product sales has been product diversification, e.g. Europa fencing and the willow products. This has been driven by the major suppliers who have ensured better availability of these wider product ranges as well as price consistency, quality control and frequent delivery. This has tended to make it more difficult for local suppliers to compete effectively

5. Farm shops were generally found to manufacture their own products with occasional use of local cottage industries. They do not tend to source from any of the mainstream suppliers.

6. Garage forecourts continue to be major retailers of split logs, kindling and charcoal. Fuel wood sales have been growing at an estimated 6% per annum, but charcoal sales have been less dynamic. The garages source these products from local fuel merchants, local farmers or CPL Industries, the premier national supplier of fuel products to the forecourt retail sector.

7. The ratings given for the importance of various features which are taken into account when purchasing products in 1994 were retested for 2001.

Importance of Factors (Max 5) Influencing Purchasing Decisions 1994 to 2001

	Garden Centres		Garage forecourts		Farmshops	
	1994	**2001**	1994	**2001**	1994	**2001**
Buying British	2.9	2.9	1.5	2.9	3.2	3.6
Buying local	2.7	2.8	1.6	2.8	3.7	3.9
Environmental label	2.9	3.5	1.6	3.5	3.3	2.9
Price	4.6	4.5	4.7	4.5	4.9	4.2
Product quality	4.7	4.7	4.4	4.7	3.8	4.2
Service quality	4.5	4.6	4.4	4.6	4.6	4.2

There has been a definite increase in the importance attached to sourcing and selling "green" products with environmental labelling. The major garden centre chains and DIY sheds have a definite policy of buying environmentally labelled wood products and the major suppliers tend to have FSC approval. In smaller/medium garden centres, however, there is less importance attached to environmental labelling, as there is no price premium attached to such products by the public.

For many garden centre buyers the environmental credentials of British suppliers are not clear and this issue needs to be addressed in the longer term.

These attitudes were reinforced by the answers to the attitude to buy or promote British products.

Policy Towards British and Green Products % Responses 1994 to 2001

	Garden Centres		Garage forecourts		Farmshops	
	Yes	No	Yes	No	Yes	No
Buy British 1994	42	58	23	77	82	18
Buy British **2001**	31	62	31	62	79	11
Promote British 1994	21	79	0	100	70	30
Promote British **2001**	31	62	31	62	79	11
Buy Green 1994	30	70	6	94	47	53
Buy Green **2001**	31	59	31	59	40	50
Promote Green 1994	15	85	0	100	47	53
Promote Green **2001**	31	59	31	59	40	50

British suppliers have however improved their positioning in the most important supply features since 1994 as shown in the following table.

Rating of British Suppliers (max 5) 1994 to 2001

	Garden Centres		Garage forecourts		Farmshops	
	1994	2001	1994	2001	1994	2001
Quality of goods	4.2	4.1	3.5	3.8	3.6	4.3
Price competitive	3.6	3.5	3.6	3.6	3.6	3.8
Value for money	3.6	3.6	3.4	3.6	3.5	4.1
Supply small lots	4.0	3.7	4	3.7	3.8	4.4
Supply large lots	4.0	3.8	3.7	3.8	3.5	4.2
Quality of service	3.7	4.0	3.7	3.9	3.5	4.3
Speed of delivery	3.5	3.9	3.7	4.0	3.5	3.6
Environmental label	3.5	3.9	2.7	2.8	3.1	3.3

8. The main conclusions from this study are:

- The rapid growth of the last five years in garden centre sales of wooden products will slow but will continue to exceed GDP growth in the future, as consumer spending on improving gardens is not slowing. The increase in average prices for many products is not likely to slow demand.

- Quality expectations will continue to grow and suppliers need to be able to produce higher, consistent quality products to pre-set costs. This implies industrialised processes and a move away from cottage industries producing rustic items.

- The fastest growing product is tropical hardwood furniture and this sector is not accessible to local suppliers. Fencing is an area where local suppliers can and do play a part in supply but the major retailers tend to use the one or two industrial producers. In fact distribution of all products has become more concentrated and this trend will continue if the smaller less profitable outlets are squeezed further in the future.

- Split logs for fuel will continue to be a major product, as will kindling and charcoal sold mainly through the garage forecourt system

- There is no distinct positive attitude to buying or promoting British products, and the market is confused as to the value of ‘green’ credentials, despite knowing that they should be promoting environmentally friendly items. Furthermore the positioning of local British suppliers for most products is unclear. A more defined policy is called for to build both the ability to supply green products and the position of British suppliers.

SECTION ONE : GARDEN CENTRES and DIY SHEDS

The number of garden centres and nurseries selling the wood products in scope have risen since 1994. There has also been a significant increase in the activities of the major DIY stores and that has influenced demand.

The market for horticultural products experienced buoyant growth from 1995 to 2001, rising to an estimated total value of £2.83bn. Growing stock/plants is the key sector of the market accounting for 32% of sales in 2001, with tools, garden care and furniture also key markets. Demand has however slowed in the last two seasons due to the extremely damp weather, preventing consumers from active outdoor gardening improvements.

Consumer attitudes towards their gardens have changed substantially in recent years. While there are still many enthusiasts who regard gardening as a hobby, many younger homeowners regard the garden as an area of relaxation and are looking for products that reduce the maintenance required, or provide instant results, such as power tools, bedding plants, lawncare, paving, etc. Consumer interest in gardening is high, partly driven by the wide exposure on television 'make over' programmes, which stimulate more creative use of even the smallest garden area. In addition, rising incomes and changing lifestyles have encouraged more homeowners to improve their garden environment, with the overall market forecast to grow by around 4% to 5% per annum over the next 3 years.

The DIY sheds trade on a policy of aggressive pricing, comprehensive display and strong promotional activity and have continued to take share from the traditional nurseries and garden centres. But garden centres are still the dominant channel for growing stock due to their product range, quality and level of service and advice. While the DIY sector is very concentrated with three major retail groups, garden centres and nurseries remain a highly fragmented sector. Many are still privately owned operations, although the growth of multiples such as Wyevale has been achieved through acquisition.

1. Overview

The HTA remains the largest trade association but it has now been established that in Intermark's previous report, the number of HTA members in East Anglia was overestimated and the number of non-members was underestimated. The data available now has enabled us to compare the true situation in 1994 with the current situation and comment on the changes that have taken place.

Based predominantly on HTA estimates Intermark's original study indicated the number of outlets to be 224 in total, of which 10 were nurseries and 10 were superstores but we now know that

- the number of garden centres in Cambridgeshire was overestimated
- the number of DIY stores was underestimated.

Therefore the total number of active outlets at the time was 204.

The total number of outlets in scope in the East Anglia region rose from 204 in 1994 to 235 in 2001 (an increase of 15% overall).

Number of Garden Centre Outlets and Nurseries 1994 to 2001

	1994			**2001**					**Net Change**
	GC and Nurseries	**DIY**	**Total**	**GC**	**Nurseries**	**Multi GC**	**DIY**	**Total**	
Essex	71	10	81	55	15	6	22	98	17
Norfolk	45	4	49	32	8	7	8	55	6
Cambs.	23	6	29	20	4	1	9	34	5
Suffolk	36	9	45	18	12	7	11	48	3
Sub Total	175	29	**204**	125	39	21	50	**235**	31
% Total	*86*	*14*	***100***	*53*	*17*	*9*	*21*	***100***	
Herts.				16	12	12	12	52	
Beds.				16	3	2	8	29	
Sub Total				32	15	14	20	**81**	
% Total				*40*	*19*	*17*	*25*	***100***	
Total				157	54	35	70	**316**	

Key points to the changes in numbers in East Anglia are:

- the total number of outlets has risen across all areas but the number of nurseries has fallen slightly. This may be due in part however to the ‘conversion’ of a number of nurseries to garden centres over the last five years;
- an additional 10 garden centres and nurseries (mainly large operations) can be found;
- the biggest rise in outlets is however in the DIY sector which has added 21 outlets in the last seven years.

Our research indicates that there could also be a significant number of retail operations (approximately 100 across all the regions) that operate as garden centres but which are not members of the HTA or any other association. These would be smaller enterprises but which nevertheless sell wooden products. These include many small businesses making up fencing and decking, outbuildings and sheds and wooden furniture to order.

The significant changes in the garden centres and nurseries include:

- **Sales area expansion**: this is particularly so with the larger outlets who have increased their indoor and outdoor sales areas to enlarge stock levels. Conversely the small outlets with restricted room have not been able to do this.

- **Increased product ranges**: particularly prevalent amongst medium and large outlets where there is not only increased displays of pure garden products, but also clothing, books, giftware and glassware and even home decoration in certain outlets.

- **Cafes or restaurants**: there has been major growth in the number of medium to large garden centres with catering. Some have developed the concept from a 'tea and bun' through to full service restaurants. These sections can now contribute significantly to a garden centres turnover and profit.

- **Aquaria and pet centres**: many medium to large centres now include pet and fish centres as a separate section to include the animals, the equipment and food.

Implementing some or all of the above features has led to a growth in sales for those centres able to carry out these additions as they attempt to combat the DIY sheds through offering a 'fuller retail experience' to their customers. It does appear to have an effect and during our research phase the customer flow in garden centres was seen to be very strong through any day of the week. For the smaller outlets unable to match this growth in product, service and competitive pricing, pressure on sales has grown particularly in the last two 'wet' years. These changes are illustrated in the makeup of the sector.

Garden Centres by Size 1994 to 2001

	1994		**2001**	
East Anglia	**No.**	**%**	**No.**	**%**
Large Independent GC	4	2	7	3
Medium Independent GC	93	46	95	40
Multiple GC	15	7	21	9
Small Independent GC	63	31	62	26
DIY Sheds	29	14	50	21
Sub Total	**204**	**100**	**235**	**100**
Hertfordshire and Bedfordshire			**No.**	**%**
Large Independent GC			8	10
Medium Independent GC			27	33
Multiple GC			14	17
Small Independent GC			12	15
DIY Sheds			20	25
Sub Total			**81**	**100**

- Several new large independent garden centres have emerged as well as the original large stores getting bigger. Significant investment has been put into these centres to bring about the rise in sales enjoyed by this sector. Scotsdales in Cambridgeshire has seen it's turnover rise to £8 million in 2001 (from about £3.5 million in 1993/4).

- The multiple centres include Wyevale (who have recently purchased County GC's) as well as Notcutts and Bypass. New chains have also emerged after acquisitions, for example Frosts, Van Hage and Country Homes and Gardens with an average of three to four outlets each. These new companies will continue to be acquisitive. There is a higher proportion of multiple outlets in Suffolk and Hertfordshire than in Essex, Cambridgeshire or Norfolk.

- Small and medium sized centres have been under the most pressure and market share has been lost to the large garden centres, multiples and the DIY sheds.

- B&Q and Focus now dominate the DIY shed sector and the latter now includes Great Mills and Octopus as well as other small chains. The large sheds do not necessarily carry the same wide range of wooden products that specialist garden centres stock and particularly the higher value items such as Teak furniture or the more decorative items. Price is a key issue with the DIY sheds and the garden centres are still the key outlets for these aspirational/big ticket, quality items.

2. Product Range

The product range in garden centres has increased since 1994. The level of stock for the common items has risen and there has also been product diversification.

Garden Centres: % Stocking of Key Products by County 1994 and 2001

	Total Area		Essex		Norfolk		Suffolk		Cambs.		Herts.	Beds.
	1994	**2001**	1994	**2001**	1994	**2001**	1994	**2001**	1994	**2001**	**2001**	**2001**
SW fencing	66	93	63	100	38	83	63	80	85	100	100	100
SW Trellis	85	97	90	100	63	83	87	100	92	100	100	100
Pergolas/arches	37	73	18	71	38	67	50	100	43	60	75	67
Expanding Trellis	49	33	18	29	38	50	87	0	20	20	50	67
Willow Fencing	0	53	0	57	0	50	0	60	-	40	75	33
HW benches	54	73	45	86	62	50	50	100	57	40	100	67
SW benches	34	47	18	57	13	17	38	20	57	20	100	100
HW tables	20	63	27	71	25	33	-	80	21	40	100	67
SW tables	24	50	0	57	13	33	75	20	21	20	100	100
HW chairs	7	67	0	86	0	33	-	80	21	40	100	67
SW chairs	7	50	0	57	13	33	-	20	14	20	100	100
Window boxes	20	37	27	29	0	17	25	60	21	20	50	67
Bird tables/box	83	90	64	100	75	83	87	100	50	60	100	100
SW planters	22	63	18	86	38	17	13	40	21	60	100	100
HW planters	29	67	72	57	25	83	0	60	14	40	100	67
Oak tubs & barrels	51	73	51	57	13	67	38	100	79	60	75	100
SW tubs	12	37	12	29	-	50	13	40	21	20	25	67
Bark products	80	100	100	100	87	100	50	100	79	100	100	100
Charcoal	51	23	55	43	75	33	87	20	14	-	-	33
Firewood	12	37	18	14	0	17	13	60	14	20	50	100
Stakes	54	77	55	71	50	83	87	60	35	80	100	67
Log rolls	44	90	82	100	30	83	38	100	21	60	100	100
Name plates	10	3	-	-	-	-	-	-	29	20	-	-

Pet homes	24	33	45	14	13	17	38	20	7	40	75	67
Compost bins	7	23	9	29	0	17	-	0	14	20	50	33

Stocking of all products has risen, in some cases dramatically and the key wooden products are now

- Fencing in the form of traditional panel and trellis is now stocked by over 90% of garden centres, up from 66% and 85% in 1994. Pergolas and rose arches have also increased in importance up from 37% to 73% overall. An important new product is willow fencing and hurdles, which are now stocked by 53% of garden centres.

- Softwood and hardwood furniture. There is some seasonal effect in this category as garden centres stock up for the Spring, but even so respondents report sales of garden furniture are significantly up over the last three years.

- Bird tables and boxes/feeders are now stocked by 90% of centres, up from 83% in 1994.

- Stockists of planters have increased from between 20 and 30% to between 60 and 70% depending on hardwood or softwood versions.

- Log rolls and stakes are also now stocked in nearly every garden centre. In 1994 only 44% had log rolls in stock and this has now risen to 90%.

- Other products such as Oak tubs and barrels, stakes and bark are now stocked by a significantly higher number of garden centres than in 1994.

A range of new products was also found, many of which were not present in 1994.

Garden Centres: % Stocking of New Products by County 1994 and 2001

	Total Area		**Essex**		**Norfolk**		**Suffolk**		**Cambs.**		**Herts.**	**Beds.**
	1994	**2001**	1994	**2001**	1994	**2001**	1994	**2001**	1994	**2001**	**2001**	**2001**
SW Decking	-	53	-	57	0	33	-	60	-	40	100	33
HW Decking	-	13	-	14	0	17	-	-	-	20	-	33
Wheelbarrows	10	30	27	14	0	-	-	60	7	40	50	33
Brooms	24	43	45	43	25	17	25	60	7	20	75	67
Woven baskets	-	50	-	14	-	33	-	80	-	40	100	67
Shelving	-	23	-	14	-	-	-	60	-	20	50	-
Pot trolleys	-	43	-	29	-	-	-	100	-	40	50	67
Bamboo edging	-	33	-	14	-	-	-	80	-	40	50	33
Chimes/mobiles	2	33	-	43	-	-	-	60	7	40	75	67

Potting tables	-	7	-	14	-	-	-	-	-	20	-	-
Bamboo screens	-	13	-	14	-	-	-	-	-	20	-	67
Obelisks	-	30	-	14	-	-	-	-	-	40	75	67
Walking sticks	-	3	-	29	-	-	-	20	-	-	-	-

It is encouraging to see new wooden products being stocked, in particular:

- European style fencing panels. These are stronger and thicker section than some UK specifications and come in different shapes and patterns. Willow fencing has gained rapid acceptance and despite the high price is proving one of the main sellers for garden centres.

- Willow is also appearing in other areas, notably woven baskets (50%) and woven obelisks (30%).

- Decking, principally softwood but also a limited amount of hardwood. There are however strong indications that overall decking sales peaked about two seasons ago and many do not expect demand to increase over the next year or two.

There is however much more imported merchandise than there was in 1994, in products such as fencing, furniture and bamboo items.

3. Key Products

3.1 Fencing and Trellis/Lattice

Now the number one stocked wooden product, fencing and trellis can be found in 80% to 100% of garden centres. For the UK produced fencing the key species are still:

- Larch
- Douglas fir
- Spruce (UK and imported products)

Forest Fencing still dominates the supply of fencing, especially since having acquired Larchlap. Forest Fencing also dominate the supply of willow fencing, pergolas and arches, log rolls and decking and are moving into planters and furniture. Forest also tends to be the main supplier to the DIY sheds, aside from Focus, which uses Larchlap.

	% 1994 East Anglia Fencing	%1994 East Anglia Trellis	% 2001 Total Area Fencing /Trellis	Purchasing
Forest Fencing	57	41	65	Direct
Local production	31	23	24	Direct
Larchlap	12	16	6	Direct
Others		20	5	Combination

Others in 2001 include:

- Netlon
- Wayland
- Rowlinson
- Farmer Foster
- Hillhout (Netherlands)
- Anglian Timber

Local suppliers still supply the smaller outlets but have lost share to Forest and the newer larger suppliers who also produce sheds and a fuller range of garden products.

The main specifications of standard square panel fencing are 6x3, 6x4 and 6x6 but prices vary depending on the type of outlet and the product itself.

	1994 East Anglia	**2001 Total Area**
6x3 lap panel	£12.31	£7 to £12.99
6x4 lap panel	£14.46	£14.99
6x6 lap panel	£16.50	£17.99
6x6 Europa style	--	£48 to 54
6x1 trellis/lattice	£5.06	£9.99
6x3 trellis/lattice	£8.90	£21.99
6x4 window lattice	£31.42	£38
6x6 willow panel	--	£45

- prices for trellis and lattice fence products have risen substantially, to realise a market price, rather than reflecting the production price;
- standard lap panels are more competitive and prices have not increased. Indeed pressure from the DIY sheds has forced many independents to simply cover costs on these items;
- the new products, for example Forests Europa range and willow realise significantly higher prices than traditional fencing products

It is likely that this market will become increasingly competitive in future as other suppliers bring out products similar to Forest Fencings current range.

3.2 Bird Tables, Boxes and Feeders

In the last study it was reported that bird tables were experiencing growing sales. This has been borne out by the large rise in stocking from 51% in 1994 to 90% in 2001. There have been major changes in supply since 1994.

	% 1994 East Anglia Bird tables	% 1994 East Anglia Feeders	% 2001 Total Area Tables/feeders	Purchasing
Local production	42	28	26	Direct
Cottage Pine	22	--	--	Wholesale
Erin	14	33	--	Direct
Riverwood	11	11	10	Direct
Odell	9	--	--	Direct
Gardman	--	--	40	Direct
Tom Chambers	--	--	20	Direct
Others	2		4	Combination

A proportion of garden centres have more than one supplier of bird tables and feeders, but there is generally a leading supplier.

- Gardman now dominate the supply of bird tables and feeders. This company began its rapid growth in 1994 and sell a wide range of garden products. They acquired Erin two years ago. They offer a comprehensive range of bird tables and feeders with good point of sale (pos) displays and are backed up by FSC and the RSPB.

- Tom Chambers, a relatively new Yorkshire company, supply upmarket bird tables with roofs of slate, thatch or wood. They only use imported Scandinavian redwood.

- Riverwood of Devon is still a major supplier of large bird tables with thatched or wood roofs. The appearance of their products is more 'rustic'.

- Local suppliers have apparently suffered, as the major players have grown, unable to compete with aggressive marketing, consistent supply and competitive pricing through the whole range of bird products. Cottage Pine has also been replaced.

The prices for tables in 1994 ranged from £25 to £40, and this is still the case as bird tables range from £24.99 to £50. The very largest items such as dovecotes can be up to £175. The prices of bird feeders have also not risen substantially currently ranging from £6 to £14.

3.3 Bark Products

All outlets now stock bark in various forms up from 80% stocking bark products in 1994. There is still branding of bark products but the suppliers have changed.

	% 1994 East Anglia	**% 2001 Total Area**	**Purchasing**
Fisons	36	--	Direct
J. A. Bowers	21	17	Wholesale
Melcourt	15	--	Direct
ICI	7	--	Direct
Westland	--	27	Direct
Levingtons	--	36	Direct
Others	21	20	Combination

Bark remains a very competitive market and has developed further into mini chipped bark, coloured bark, playground bark as well as the categories prevalent in 1994. Prices however have been under pressure. In 1994 an 80-litre bag of bark was sold for between £5.95 and £6.49; in 2001 the price for 80 litres is £4.49 to £6.99.

Westland and Levingtons now dominate the market although local suppliers and imported products are holding their share. Untreated softwood bark is still the most popular product.

3.4 Log Rolls

There has been a marked increase in the stocking of log rolls since 1994 when only 44% of centres sold rolls and borders, to 90% in 2001. There has also been an increase in the sales of log rolls.

	% 1994 East Anglia	% 2001 Total Area	Purchasing
Forest	67	75	Direct
Larchlap	17	5	Direct
Others	16	20	Direct

Others include:-

- Wayland
- Rowlinson
- Farmer Foster
- Hillhout
- Local suppliers

Forest has continued to dominate the supply of log rolls but there have been recent entrants to the market, mainly with lower cost products although Hillhout of Holland supply more expensive log roll. The price changes are shown in the table below:-

For 8’ log roll	**1994 East Anglia**	**2001 Total Area**
6” high	£10.82	£8.95
9” high	£12.56	£12.95
12” high	£15.50	£17.99

3.5 Stakes

The stocking of stakes has increased from 54 to 77% across all regions. Stakes continue to be predominantly hardwood but softwood stakes are also now used.

Forest/Larchlap and Netlon continue to be the main suppliers but the share of local and other suppliers has reportedly not changed significantly since 1994, accounting for about 40% of the supply of stakes.

The price of stakes has also fallen, partly because of the use of slightly more softwood.

	1994 East Anglia	2001 Total Area
4’ high 1x1”	£99p to £1.07	£1.25
8’ high 1 ½ x1 ½”	£3 to £3.72	£2.50 to £2.99

3.6 Furniture

Hardwood and softwood furniture for the garden has proved to be one of the biggest selling products for medium to large garden centres over the last five years. Although still highly seasonal many stores have put in concessions for various manufacturers, staffed by the suppliers’ sales people to move the furniture during peak season. Our fieldwork coincided with the start of the stocking season for furniture and party explains the big rise in stockists up from between 7 and 54% in 1994 to between 50 and 73% in 2001. Nevertheless, sales of high value furniture have reportedly risen substantially over the last five years as part of the ‘aspirational spending’ for gardens.

Many of the original suppliers are still a strong presence in today’s market. Many garden centres have more than one brand in stock, in various wood species:

- Teak and Iroko still dominate the hardwood market, although acacia and eucalyptus products have also been noted;
- softwood products tend to be imported from Scandinavia, or less frequently UK produced;

	% 1994 East Anglia	% 2001 Total Area	Purchasing
Local/Other	45	20	Direct
Swan Hattersley	23	25	Direct
Bridgman	18	20	Direct
ILL	14	--	Direct
Barlow Tyrie	4	6	Direct
Branson Leisure	4	5	Direct
Lister	4	--	Direct
Forest	4	--	Direct
Alexander Rose	--	24	Direct

- The rise of Alexander Rose has been spectacular and after only six years the company holds a leading market share in hardwood garden furniture of all types;
- Swan Hattersly and Barlow Tyrie have improved their share and also specialise in hardwood furniture.

As in 1994 the price range is very wide depending on the outlet and the type of furniture. The number of styles and patterns has also increased substantially. A single 5' bench in 1994 ranged from £115 to £399, but in 2001, a similar bench retails for £175 to £450. However a full set of 4 chairs and a table in Teak could be as high as £1,200.

- Only small amounts of rustic pine or Oak furniture have been reported. The emphasis is on Teak or Iroko at the top end of the market and Eucalyptus and Pine in the middle market. There is lower demand for the rustic look produced by local suppliers in 1994, i.e. the low price end of the market has declined;

- relatively few local suppliers were found, partly because they were the producers of the rustic look, but also because the larger stores seem to prefer to deal with the accredited, quality controlled suppliers. This is extended in the DIY sheds to low prices, that local suppliers cannot compete with

- imports are therefore the key source of furniture in the garden centre and DIY shed sector.

3.7 Planters

There has been a marked increase in the stocking of planters. On average the number of garden centres stocking softwood planters has risen from 22% in 1994 to 63% in 2001 and hardwood planters have also risen, from 29% to 67%.

The main suppliers in 1994 were Trevis and Farmer Foster. Both are still suppliers of hardwood (tropical) planters but the softwood planters are supplied direct by:

- AFK Marketing
- Gardman
- Forest Fencing

The two new companies are principally responsible for the rise in good quality softwood planters, either plain or stained in modern colours, although these planters are relatively thin section softwood and treated. Forest Fencing has entered the exterior planter market with a range of more substantial softwood products. There is increasing competition from ceramic and terracotta planters but the market has grown strongly in the last four years.

Depending on shape and length, softwood planters are priced from £12.99 to £21.99. Hardwood planters are priced from £19.99 to £39.99 showing a drop in price since 1994 and a broadening of the range available.

3.8 Other Products

The main new products include decking and woven products (willow) but there are also new products within established sectors:

- softwood decking was found in 53% of centres overall and the main supplier is Forest Fencing selling from merchandising units with all the components for a deck. Rowlinson and Hillhout are also suppliers to the market. The peak in sales is reported to have been two seasons ago for the majority of centres and many report that tiles and paving are now coming back into fashion. It is expected that future sales will be steady at best and a number of respondents expect falling sales;

- there has been a rise in the stocking of barrels across garden centres and oak and acacia remain the key species. Prices have not moved substantially, nor has the supply with Sherston Earl of Devon still a main supplier with the remainder being supplied principally from local producers;

- willow baskets and obelisks using a frame with interlaced willow as a decorative item are now popular and are an entirely new product using wood. Obelisks range in height from 2 feet to 6 feet and in price from £6.99 to £21.99.

Other new product variations found since 1994 include:

- picket fencing or pale fencing using softwood;
- fencing screens of wood or willow which are priced at about £25 to fall in between standard fencing and the newer high specification products;
- featheredge boards;
- poles;
- sandpits, square and hexagonal;
- dovecotes;
- tub trolleys; small wooden slatted bases with wheels;
- pitcher pumps attached to tubs;
- ornamental wheelbarrows;
- gazebos and arbours;
- sheds and playhouses.

4. Market Sizes

The market size for wood products was calculated in 1994 on the basis of the data gathered during the fieldwork for sales volumes, prices and proportion of stockists. The same process has been used to calculate the market size for 2001.

The proportion of large/medium outlets to small has however not changed significantly and we have again used a ratio of 53:47 in determining the numbers of outlets.

It will be noted that there are several new products and product sectors, notably pergolas, willow fencing, softwood planters and tubs as well as a range of miscellaneous items including woven products and decking.

The market has grown considerably since 1994, from £4.4 million to £10.8 million at RSP. The market in Hertfordshire and Bedfordshire is estimated to be £3.9 million in 2001.

We present three tables:

- market size in East Anglia in 1994, using the *Summer* estimates for garden furniture and charcoal;
- market size in East Anglia in 2001;
- market size in Hertfordshire and Bedfordshire in 2001.

Calculation of Market Size East Anglia 1994

	204 Outlets in East Anglia 1994							
	% Stocking	Number	Size L/m	Size Small	Unit Sales/a	Unit Price	Sales per a	Market Size
SW fencing	66	135	71		480	20	9600	685,048
				63	240	20	4800	303,748
SW Trellis	85	173	92		520	12	6240	573,468
				81	260	12	3120	254,274
Pergolas/arches	37	75	40		0	0	0	-
				35	0	0	0	-
Expanding Trellis	49	100	53		130	10	1300	68,872
				47	52	10	520	24,430
Willow Fencing	0	0	0		0	0	0	-
				0	0	0	0	-
HW benches	*70*	143	76		33	200	6600	499,514
				67	16	200	3200	214,771
SW benches	*70*	143	76		40	60	2400	181,642
				67	20	60	1200	80,539
Other Furniture	20	41	22		20	60	1200	25,949
				19	10	60	600	11,506
Bird tables/box	83	169	90		50	25	1250	134,609
				80	30	25	750	59,685
SW planters	22	45	24		0	0	0	-
				21	0	0	0	-
HW planters	29	59	31		80	25	2000	62,710
				28	40	25	1000	27,805
Oak tubs	51	104	55		150	17	2550	140,610
				49	50	17	850	41,564
SW tubs	12	24	13		0	0	0	-
				12	0	0	0	-
Bark products	80	163	86		520	6.5	3380	292,356
				77	520	6.5	3380	259,260
Charcoal	*80*	163	86		320	4	1280	110,715
				77	160	4	640	49,091
Stakes	54	110	58		160	2	320	18,683
				52	160	2	320	16,568
Log rolls	44	90	48		50	12	600	28,544
				42	20	12	240	10,125
Other Products								165,000
Total Market								**4,382,286**

Calculation of Market Size East Anglia 2001

	235 Outlets in East Anglia 2001							
	% Stocking	Number	Size L/m	Small	Unit Sales/a	Unit Price	Sales per a	Market Size
SW fencing	93	219	116		520	20	10400	1,208,965
				103	240	20	4800	494,816
SW Trellis	97	227	120		520	15	7800	939,107
				107	260	15	3900	416,397
Pergolas/arches	73	172	91		26	125	3250	296,844
				81	12	125	1500	121,495
Expanding Trellis	33	78	42		130	10	1300	53,972
				37	52	10	520	19,145
Willow Fencing	53	125	66		120	50	6000	398,560
				59	50	50	2500	147,267
HW benches	73	172	91		50	250	12500	1,141,708
				81	15	250	3750	303,738
SW benches	73	172	91		50	60	3000	272,765
				81	15	60	900	72,566
Other Furniture	63	149	79		40	500	20000	1,577,633
				70	20	400	8000	559,613
Bird tables/box	90	212	112		70	25	1750	196,166
				99	40	25	1000	99,405
SW planters	63	149	79		200	15	3000	236,645
				70	100	15	1500	104,928
HW planters	67	157	83		80	25	2000	166,067
				74	40	25	1000	73,633
Oak tubs/barrels	73	172	91		150	17	2550	232,909
				81	50	17	850	68,847
SW tubs	37	86	46		50	10	500	22,834
				40	20	10	200	8,100
Bark products	100	235	125		520	5.5	2860	356,213
				110	520	5.5	2860	315,887
Charcoal	80	188	100		320	4	1280	127,539
				88	160	4	640	56,550
Stakes	77	180	95		180	2	360	34,376
				85	180	2	300	25,404
Log rolls	90	212	112		100	12	1200	134,514
				99	50	12	600	59,643
Other Products								500,000
Total Market								**10,844,249**

- sales of softwood fencing and trellis has increased by 50%. High value items have also been added to the product mix, notably pergola's and willow fencing and fencing sales overall have more than doubled since 1994;

- furniture sales have also expanded rapidly. Sales of expensive hardwood furniture have more than doubled since 1994 and new suppliers have stimulated demand;
- sales of oak tubs and barrels remain strong and there has been a rapid growth in the sales of softwood planters (and barrels). Product differentiation has been a key success factor in this area.

Calculation of Market Size in Hertfordshire and Bedfordshire 2001

	81 Outlets in Hertfordshire and Bedfordshire 2001							
	% Stocking	Number	Size L/m	Small	Unit Sales/a	Unit Price	Sales per a	Market Size
SW fencing	100	81	43		520	20	10400	446,472
				38	240	20	4800	182,736
SW Trellis	100	81	43		520	15	7800	334,854
				38	260	15	3900	148,473
Pergolas/arches	71	58	30		26	125	3250	99,061
				27	12	125	1500	40,545
Expanding Trellis	58	47	25		130	10	1300	32,369
				22	52	10	520	11,482
Willow Fencing	54	44	23		120	50	6000	139,093
				21	50	50	2500	51,395
HW benches	83	67	36		50	250	12,500	445,399
				32	15	250	3750	118,493
SW benches	47	38	20		50	60	3000	60,102
				18	15	60	900	15,989
Other Furniture	63	51	27		40	500	20000	543,780
				24	20	400	8000	192,888
Bird tables/box	100	81	43		70	25	11750	75,128
				38	40	25	1000	38,070
SW planters	63	51	27		100	15	1500	40,784
				24	50	15	750	18,083
HW planters	67	54	29		80	25	2000	57,240
				25	40	25	1000	25,380
Oak tubs	88	71	38		150	17	2550	96,335
				34	50	17	850	28,476
SW tubs	46	37	20		50	10	500	9,874
				18	20	10	200	3,502
Bark products	100	81	43		520	5.5	2860	122,780
				38	520	5.5	2860	108,880
Charcoal	80	65	34		320	4	1280	43,960
				30	160	4	640	19,492
Stakes	83	67	36		180	2	360	12,827
				32	180	2	360	11,375
Log rolls	100	81	43		100	12	1200	51,516
				38	50	12	600	22,842

Other Products								200,000
Total Market								**3,906,646**

The items predominantly using softwood are:

- Fencing and trellis/lattice
- Pergolas and arches
- Bird tables and feeders
- Bark
- Log rolls
- Softwood benches and furniture
- Pet homes
- Tubs and planters

The items using hardwood are:

- Benches and furniture (mainly tropical species)
- Planters and tubs (acacia, oak)
- Barrels (oak)
- Tree stakes (tropical)

5. Purchasing

As in 1994, attitudes to purchasing were collected and have been analysed to compare with the previous results.

5.1 Decision Makers

Decision Makers by County % of Respondents 1994 and 2001

	Total Area		**Essex**		**Norfolk**		**Suffolk**		**Cambs.**		**Herts.**	**Beds.**
	1994	**2001**	1994	**2001**	1994	**2001**	1994	**2001**	1994	**2001**	**2001**	**2001**
Managers	37	38	36	29	50	33	13	60	43	60	33	33
Owners	56	31	64	43	50	67	87	0	36	20	0	33
Centralised	7	30	0	29	0	0	0	40	21	20	67	33

The rise in the number of DIY and multiple garden centre outlets has led to a rise in centralised buying across all the counties.

- In Essex there was no centralised buying recorded in 1994 but it is certain that the chains and DIY sheds at the time should have been classified as such. Therefore the rise in the number of outlets with centralised buying is not as sharp as it appears.

- If the DIY sheds are omitted and the proportion of multiple garden centres to independent centres is analysed then the ratio of 55% managers to 45% owners across the six counties is fair reflection of buying responsibility.

5.2 Factors Influencing Purchasing

The factors taken into account when purchasing stock were rated on a scale of 1 to 5 where 1 is “not at all important” and 5 was “very important”.

Rating of Purchasing Factors 1994 to 2001

	Total Area		**Essex**		**Norfolk**		**Suffolk**		**Cambs**		**Herts**	**Beds**
	1994	**2001**	1994	**2001**	1994	**2001**	1994	**2001**	1994	**2001**	**2001**	**2001**
Buying British	2.9	2.9	2.5	2.7	2.7	3.8	2.5	2.6	3.4	2.8	2.3	2.7
Buying local	2.7	2.8	2.5	2.7	2.4	3.7	2.5	2.2	3.1	3	2.0	2.7
Environmental label	2.9	3.5	2.5	3.0	2.3	4.2	1.8	3.4	4.3	3.6	4.0	2.7
Price	4.6	4.5	4.6	4.7	4.8	5.0	3.5	3.8	4.8	4.6	4.0	4.7
Product quality	4.7	4.7	4.9	5.0	5.0	5.0	3.5	4.0	4.5	4.6	5.0	4.7
Service quality	4.5	4.6	4.5	4.7	4.8	5.0	3.5	4.0	4.0	4.4	4.3	5.0

As in 1994, product quality remains the top rated feature with service and price close behind. There is no statistical difference between the regions in rating these factors highly and the three features could almost be regarded as of equal importance.

- The main change has been the increased importance across all levels of the environmental credentials of suppliers and this feature stands out as a clear second most important factor after the first three. The change is particularly noticeable in Norfolk and Suffolk.

- Buyers are still ambivalent towards buying British and buying local products and the ratings for these two features has hardly changed since 1994 (other than in Norfolk).

Respondents were also asked how they thought customers rated the importance of the features.

Rating of Customer Purchasing Factors 1994 to 2001

	1994		**2001**	
	Average	Customer	Average	Customer
Buying British	2.9	2.1	2.9	2.8
Buying local	2.7	1.9	2.8	2.7
Environmental label	2.9	2.6	3.5	3.2
Price	4.6	4.7	4.5	4.5

Product quality	4.7	4.8	4.7	4.7
Service quality	4.5	0	4.6	4.4

Price, quality and service all rank very highly as they did in 1994 but there is a perception that customers would prefer to buy British and locally produced wood products. There has also been an increase in the importance attached to environmental labels, which in 1994 was considered of average influence. But there is still no indication that a premium would be paid for such products.

Respondents were asked if they had a policy to buy/promote British or local or 'green' products.

Buying and Promotion Policy % of Respondents 1994 to 2001

	All Areas		**Essex**		**Norfolk**		**Suffolk**		**Cambs.**		**Herts.**		**Beds.**	
	Yes	No	Yes	No	Yes	No	Yes	No	Yes	No	Yes	No	Yes	No
Buy British 1994	42	58	27	73	38	62	63	37	50	50	0	0	0	0
Buy British **2001**	31	62	29	71	67	33	20	60	20	60	0	100	50	50
Promote British 1994	21	79	0	100	25	75	37	63	33	67	0	0	0	0
Promote British **2001**	31	62	14	86	83	17	20	60	20	60	0	100	50	50
Buy Green 1994	30	70	10	90	13	87	25	75	100	0	0	0	0	0
Buy Green **2001**	31	59	0	86	67	33	40	40	20	60	50	50	100	100
Promote Green 1994	15	85	0	100	13	87	25	75	33	67	0	0	0	0
Promote Green **2001**	31	59	0	86	67	33	40	40	20	60	50	50	100	100

n.b. 2001 ratings do not total 100 when 'Don't knows' were recorded

Overall there has been a slight decline in any buy British attitudes there may have been in 1994, driven by the increase in imported products but there is reportedly an increase in the desire to promote British/local products.

There is also no apparent policy to buy green products amongst independent garden centres, although this is clearly the policy of the multiples and the DIY sheds whenever possible. There is however a definite move towards promoting green products compared with 1994.

- Essex and Cambridgeshire are the least active areas buying and promoting British products, and apparently the least active promoters of 'green' products;
- Norfolk shows the biggest swing toward British products and promoting environmentally approved products;
- Centres in Suffolk report an increase in promoting 'green' products.

Respondents were asked what their impressions were of British manufacturers, the answers rated on a scale of 1 to 5.

Impressions of British Suppliers 1994 to 2001

	Total Area		**Essex**		**Norfolk**		**Suffolk**		**Cambs.**		**Herts.**	**Beds.**
	1994	**2001**	1994	**2001**	1994	**2001**	1994	**2001**	1994	**2001**	**2001**	**2001**
Quality of goods	4.2	4.1	3.8	4.0	4.0	4.3	3.8	3.8	4.3	4.6	4.0	3.7
Price competitive	3.6	3.5	3.8	3.2	4.0	4.0	3.3	3.3	3.0	3.4	3.8	3.7
Value for money	3.6	3.6	3.6	3.2	4.0	4.3	3.3	3.2	3.3	3.8	3.3	3.7
Supply small lots	4.0	3.7	4.0	3.4	4.2	4.2	3.8	4.0	4.0	3.8	3.0	3.5
Supply large lots	4.0	3.8	3.4	3.5	3.5	4.2	3.8	4.0	3.0	3.8	3.8	3.7
Quality of service	3.7	4.0	3.8	3.5	3.4	4.3	3.8	4.3	4.0	4.2	3.8	4.0
Speed of delivery	3.5	3.9	3.5	3.4	3.2	4.3	3.8	4.3	4.0	4.0	3.8	4.0
Environmental label	3.5	3.9	3.6	3.6	3.5	4.0	3.5	4.3	4.0	4.0	3.5	4.0

British suppliers have slightly improved their service, delivery and environmental credentials since 1994 but have moved very little in the areas of price competitiveness and value for money.

- Quality remains a strong point for British suppliers but the pressure from cheaper imported products is still strong;
- There has been a rise in perception in Norfolk and Suffolk in particular, with British suppliers holding their own in the other counties.

6. Opportunities for Local Suppliers

There has been a clear increase in the amount of imported products in garden centres. During the fieldwork the question of the position of British suppliers/local timbers was put to respondents to see how attitudes to this source of products had changed since 1994.

Attitude to Stocking British/Local Products

	Total Area		**Essex**		**Norfolk**		**Suffolk**		**Cambs.**		**Herts.**	**Beds.**
	1994	**2001**	1994	**2001**	1994	**2001**	1994	**2001**	1994	**2001**	**2001**	**2001**
Locally made	3.8	3	4.3	3.4	3.1	2.8	3.3	3.5	4.4	2.3	2.7	3
British products	3.8	3.2	4.2	3.4	3.1	3.6	3.4	3.5	4.4	2.3	3.3	3

There has reportedly been a decline in the desire to substitute products with British goods or those with an element of ‘local’ timber in them. The trend is stronger in the major population centres of Essex, Herts and Beds as well as Cambridgeshire. Norfolk and Suffolk however reflect a more positive attitude towards local products.

Taken in context, it can be noted that:

- many of the key products, such as fencing, tubs, barrels, bark and bird tables are already sourced in the UK, although not necessarily locally. But the major big ticket items, hardwood furniture for example are increasingly imported;
- the major chains in both DIY and garden centres increasingly source outside the UK, or at least evaluate different sources constantly.

7. Opportunities for Local Suppliers

With stocking levels so high of all the major wood products already, plus the increase in product diversity, it is not surprising that no new major products were suggested, nor were improvements required to many items. Garden centres rely on the suppliers to conform to the commercial specifications laid down during the initial purchasing and the commercial factors are then more important than product fine-tuning.

The product diversity is not just in the wood products. Many garden centres have expanded to include all types of home, pet and shopping products and it is clear that the sales area devoted to wood products has not expanded in line with the new product offerings.

- Space has had to be found for catering/café/restaurants, for pet centres and imported garden furniture. The space given to ‘traditional’ wood products has not necessarily decreased as products like decking and sheds have also gained ground, but in fast moving retail environments, product displays are changed rapidly if they are not profitable compared to another, possibly completely different product line.

- Product quality expectations have also been raised, as has quality consistency, particularly in areas such as garden furniture.

SECTION TWO : FARM SHOPS

1. Overview

In 1994 the number of farm shops was estimated to have been 70 to 90 overall, depending on the season, which is still effectively late June to September. The number of farm shops in 2001/2 is estimated to be 75 to 100 in East Anglia and about 30 in Herts. and Beds.

Most farm shops concentrate on selling 'produce' from their own planting and therefore do not stock or sell many wood products. The majority of farm shops fall into this category with some exceptions:

- several farm shops have progressed and expanded to become small garden centres;
- a number have become local suppliers by developing their processing facilities, e.g. Giddings in Bedfordshire.

It is clear that the majority, more than 2/3 of our sample, regarded the garden centres as 'too much opposition' when it came to wood products. Nevertheless, the range of products sold has expanded and in the future a proportion of farm shops report they will expand to selling more products.

2. Product Range

The product range in farm shops has changed since 1994 and in some instances the stock held resembles that of garden centres.

Farm Shops: % Stocking of Key Products by County 1994 and 2001

	Total Area		**Essex**		**Norfolk**		**Suffolk**		**Cambs.**		**Herts.**	**Beds.**
	1994	**2001**	1994	**2001**	1994	**2001**	1994	**2001**	1994	**2001**	**2001**	**2001**
SW fencing	0	7	0	14	0	0	-	0	-	0	0	17
Trellis/rustic	6	20	-	29	20	0	-	0	-	40	25	17
Willow Fencing	-	3	-	14	-	0	-	0	-	0	0	0
SW benches	6	10	20	14	-	0	-	0	-	0	25	17
Other Furniture	-	7	-	14	-	0	-	0	-	0	0	17
Bird tables/box	53	47	80	57	60	50	-	50	40	40	50	33
Planters	6	3	-	14	20	0	-	0	-	0	0	0
Oak tubs & barrels	24	10	-	0	20	0	50	0	20	20	25	17
Bark products	6	10	-	0	20	25	-	0	-	20	0	17
Charcoal	12	17	40	0	-	25	-	25	-	0	25	33
Firewood	12	67	40	57	-	75	-	75	-	60	75	67
Pet homes	4	13		14		0		0		20	25	16.7

Other products present in 1994 but not found now include Christmas trees, fence poles, carved animals, brooms, name plates and picnic boxes.

Stocking of other products has however risen, notably in:

- more farm shops now stock fencing in the form of traditional panel and trellis, albeit still a low level. These also tend to be the larger operations trying to be more like a garden centre. Willow fencing has also appeared;

- stocking of furniture has increased somewhat but low stock levels are unable to compete with the high inventory levels in large garden centres. There is also a strong seasonal effect in this sector;

- bird tables and boxes/feeders are stocked by almost the same percentage of garden centres as in 1994 and some counties have declined. This is a reflection of the increased stockholding in the garden centres and has undoubtedly put pressure on sales of bird tables and feeders at the farm shop level;

- this seems also to be reflected in the stock of barrels and tubs of oak/hardwood that have reportedly declined;

- firewood and kindling was found to be the most stocked item. These products are easy to source for the farm shops and are now stocked by 67% overall, up from only 12% in 1994.

Essex and Hertfordshire, being the most populated counties still have the widest stock ranges and local sourcing (i.e. from the farm itself or a nearby cottage producer) is still the main method of stocking farm shops.

3. Key Products

3.1. Fencing and Trellis/Lattice

Fencing and trellis can be found in a limited number of farm shops, generally the larger outlets. The fencing is generally made on the farm or supplied by a local small producer. The key species are:

- larch
- spruce

Although a competitive market the view is that if the products can be made cheaply using the farms resources than it is a worthwhile product. One or two farms have developed their production to be able to supply to other farm shops and particularly to local garden centres. These products are generally cheaper than those of the major suppliers.

The main specifications of standard square panel fencing are 6x3, 6x4 and 6x6.

3.2 Bird Tables, Boxes and Feeders

Bird tables and feeders are still seasonal items but are still widely stocked and found in every county. Locally grown softwood is still the main material used and rustic designs are still popular. The farm shops interviewed use none of the major suppliers for bird tables.

The prices for tables in 1994 ranged from £15 to £28, and this is still the case as bird table's range from £18 to £30. The prices of bird feeders have also not risen substantially currently ranging from £6 to £8.99.

3.3 Firewood

The ability to produce and package firewood, split and whole logs, and kindling has led to a rise in the number of farm shops selling fuel. Charcoal was not yet in season but a proportion of shops will also stock charcoal in summer when sales of logs and kindling decline substantially.

Kindling is sold from £0.50 to 99p per bundle and logs from £2.99 to £4.99 per bundle. The sizes of bundles obviously vary with each outlet.

3.4 Tubs, Barrels and Planters

There has been a decline in the stocking of these items. The reasons for this were not clears from the fieldwork but the decline is probably due to:

- increased competition from garden centres;
- a decline in the availability of barrels from local 'cottage industry' reconditioners.

No iron hand pump products were found although there will be some farm shops still selling these higher value items.

Oak barrels still sell for between £25 and £45 each.

3.5 Others

- Furniture for the garden has increased in importance and picnic and garden benches of softwood have risen in importance for the farm shops, predominantly for the larger outlets. All were home made or locally produced and the styles remain rustic in appearance although one or two farm shops did stock better quality products.

- There is an increase in the stocking of pet homes, rabbit hutches and the like but this remains a cottage industry for most farm shops that have difficulty competing with the garden centre pet stores now commonplace in the region.

- There seems to have been a decline in the small, unusual products found in 1994, such as brooms, wishing wells and carved items for the garden. This may be a seasonal affect but again the competition from garden centres that have increased their range of ornamental type items must have had an effect on farm shops.

4. Market Sizes

The market size for wood products was calculated in 1994 on the basis of the data gathered during the fieldwork for sales volumes, prices and proportion of stockists. The same process has been used to calculate the market size for 2001. It will be noted that we have combined some product areas.

The market has grown since 1994, from £77,000 to £99,000at RSP. The market in Hertfordshire and Bedfordshire is estimated to be £44,000 in 2001.

We present three tables:

- market size in East Anglia in 1994
- market size in East Anglia in 2001
- market size in Hertfordshire and Bedfordshire in 2001.

Calculation of Market Size through Farm Shops East Anglia 1994

	80 Outlets in East Anglia 1994					
	% Stocking	Number	Unit Sales/a	Unit Price	Sales per a	Market Size
SW fencing	0	0	0	0	0	-
Trellis/rustic	6	5	30	12	360	1,728
Willow Fencing	0	0	0	0	0	-
SW benches	12	10	5	50	250	2,400
Other Furniture	0	0	0	0	0	-
Bird tables/box	53	42	30	18	540	22,896
SW Planters/tubs	18	14	30	10	300	4,320
Oak tubs & barrels	24	19	30	15	450	8,640
Bark products	0	0	0	0	0	-
Charcoal	14	11	25	3	75	840
Firewood/kindling	12	10	50	0.5	25	240
Pet homes	0	0	0	0	0	-
Christmas Trees						16,000
Other Products						20,000
Total Market						**77,064**

Calculation of Market Size through Farm Shops East Anglia 2001

	85 Outlets in East Anglia 2001					
	% Stocking	Number	Unit Sales/a	Unit Price	Sales per a	Market Size
SW fencing	4	3	50	15	750	2,277
Trellis/rustic	17	3	30	15	450	1,366
Willow Fencing	4	10	30	30	900	8,606
SW benches	4	3	5	50	250	759
Other Furniture	4	3	10	50	500	1,518
Bird tables/box	49	42	20	18	360	15,081
SW Planters/tubs	4	3	30	12	360	1,093
Oak tubs & barrels	5	4	30	15	450	1,913
Bark products	11	10	50	3	150	1,434
Charcoal	13	11	25	4	100	1,063
Firewood/kindling	67	57	100	3	300	17,030
Pet homes	9	7	50	12	600	4,335
Christmas Trees						18,000
Other Products						25,000
Total Market						**99,475**

Even discounting the estimate for Christmas tree sales, there has been a rise in the market. Key changes have been:

- fencing products have expanded as larger Farm Shops move towards being garden centres;
- sales of bird tables and boxes have reportedly declined in the face of more competition from the garden centres;
- very few stocks of barrels, tubs and planters were found;
- more pet homes and firewood kindling is now being sold.

Calculation of Market Size in Hertfordshire and Bedfordshire 2001

	30 Outlets in Hertfordshire and Bedfordshire 2001					
	% Stocking	Number	Unit Sales/a	Unit Price	Sales per a	Market Size
SW fencing	8	3	50	15	750	1,875
Trellis/rustic	21	6	30	15	450	2,813
Willow Fencing	-	0	30	30	900	-
SW benches	21	6	5	50	250	1,563
Other Furniture	8	3	10	50	500	1,250
Bird tables/box	42	13	20	18	360	4,500
SW Planters/tubs	-	0	30	12	360	-
Oak tubs & barrels	21	6	30	15	450	2,813
Bark products	8	3	50	3	150	375
Charcoal	29	9	25	4	100	875
Firewood/kindling	71	21	100	3	300	6,375
Pet homes	21	6	50	12	600	3,750
Christmas Trees						8,000
Other Products						10,000
Total Market						**44,188**

The items predominantly using softwood are:

- Fencing and trellis
- Bird tables and feeders
- Bark
- Softwood benches and furniture
- Pet homes
- Tubs and planters

The items using hardwood are:

- Planters and tubs
- Barrels

5. Purchasing

As in 1994, attitudes to purchasing were collected and have been analysed to compare with the previous results.

5.1 Decision Makers

Decision Makers by County % of Respondents 1994 and 2001

	Total Area		**Essex**		**Norfolk**		**Suffolk**		**Cambs.**		**Herts.**	**Beds.**
	1994	**2001**	1994	**2001**	1994	**2001**	1994	**2001**	1994	**2001**	**2001**	**2001**
Managers	6	0	20	0	0	0	0	0	0	0	0	0
Owners	94	100	80	100	100	100	100	100	100	100	100	100

The table reflects the fact that owners carry the main responsibility for purchasing but in reality there is practically no purchasing outside of local or farms own supply.

5.2 Factors Influencing Purchasing

The factors taken into account when purchasing stock were rated on a scale of 1 to 5 where 1 is “not at all important” and 5 was “very important”. As in 1994 the views on customer’s ratings of factors are also given.

Rating of Purchasing Factors 1994 to 2001

	1994		**2001**	
	Average	Customer	Average	Customer
Buying British	3.2	3.6	3.6	3.6
Buying local	3.7	3.7	3.9	4.2
Environmental label	3.3	3.3	2.9	3.1
Price	4.9	4.1	4.2	4.4
Product quality	3.8	4.6	4.2	4.6
Service quality	4.6	0	4.2	4.3

As in 1994, product quality remains the top rated feature with service and price close behind. There is no statistical difference between the regions in rating these factors highly and the three features could almost be regarded as of equal importance.

- There has been no change in the importance of the environmental credentials of suppliers, either from the farmers who see themselves as green anyway or from the customers;

- Customers do however value buying locally slightly more than they did in 1994.

Respondents were asked if they had a policy to buy/promote British or local or 'green' products.

Buying and Promotion Policy % of Respondents 1994 to 2001

	All Areas	
	Yes	**No**
Buy British 1994	82	18
Buy British **2001**	79	11
Promote British 1994	70	30
Promote British **2001**	79	11
Buy Green 1994	47	53
Buy Green **2001**	40	50
Promote Green 1994	47	53
Promote Green **2001**	40	50

n.b. 2001 ratings do not total 100 when 'Don't knows' were recorded

Overall there has been very little change in the attitudes of farm shops to buying or promoting British products, mainly because these outlets only sell British products.

However, there is also no apparent policy to promoting green products amongst farm shops although a number of 'don't knows' in the responses suggests that the issue is being contemplated but the direction for farm shops is confused.

Respondents were asked what their impressions were of British manufacturers, the answers rated on a scale of 1 to 5 where the limited number who did outsource had experience.

Impressions of British Suppliers 1994 to 2001

	Total Area	
	1994	**2001**
Quality of goods	3.6	4.3
Price competitive	3.6	3.8
Value for money	3.5	4.1
Supply small lots	3.8	4.4
Supply large lots	3.5	4.2
Quality of service	3.5	4.3
Speed of delivery	3.5	3.6
Environmental label	3.1	3.3

British suppliers have slightly improved their offering across the board of service, delivery and environmental credentials since 1994 as well as in the areas of price competitiveness and value for money.

6. Opportunities for Local Suppliers

As reported in 1994 there was a very low level of response to the question of substituting products as the majority of products are sourced either on the farm or from known local suppliers. The same reticence to commit to changing products found in 1994 is stronger today, as the environment becomes increasingly competitive.

SECTION THREE : GARAGE FORECOURTS

1. Overview

In 1994 the number of garage forecourts in East Anglia was estimated to be 1,680 overall. The number of forecourts in 2001/2 is estimated to be the same given a reported decrease in the number of private stations and the increase in the number of company owned and supermarket petrol stations. It is estimated that Hertfordshire and Bedfordshire has 450 stations between them.

2. Product Range

The product range in forecourts has not changed significantly since 1994.

Forecourts: % Stocking of Key Products by County 1994 and 2001

	Total Area		**Essex**		**Norfolk**		**Suffolk**		**Cambs.**		**Herts.**	**Beds.**
	1994	**2001**	1994	**2001**	1994	**2001**	1994	**2001**	1994	**2001**	**2001**	**2001**
SW Trellis	-	3	-	14	-	-	-	-	-	-	-	-
SW benches	3	3	13	14	-	-	-	-	-	-	-	-
SW chairs	3	3	13	14	-	-	-	-	-	-	-	-
Bird tables/box	3	14	13	14	-	20	-	-	-	-	20	25
SW planters	3	3	13	14	-	-	-	-	-	-	-	-
HW tubs & barrels	-	3	-	14	-	-	-	-	-	-	-	-
Bark products	-	3	-	-	-	-	-	25	-	-	-	-
Charcoal	70	48	87	57	75	40	88	-	81	75	60	50
Firewood/kindling	70	93	75	86	75	100	88	100	81	100	80	100
Compressed wood logs	29	24	38	43	38	20	38	-	9	50	25	-

'Fire sundries' are still the key item but stock levels have reportedly risen since 1994:

- charcoal is undoubtedly stocked by more garage forecourts than is reflected in the findings. The percentage of forecourts stocking is low because of the time of year and most respondents reported that charcoal would be sold in the summer as log sales declined;

- firewood and kindling have been combined as the respondents in our sample reported that both were nearly always stocked together (although not necessarily sold together);

- the compressed wood logs were sourced locally in 1994, and there is one UK manufacturer who dominates the market for this product. The research did however discover imported North American compressed fuel logs in ready-to-light packaging;

- stocking of furniture has not changed with a select few larger garages selling locally produced furniture either of softwood or of imported hardwood. No Oak/hardwood furniture was reported;

- bird tables and boxes/feeders are stocked by more forecourts in rural areas than in 1994.

3. Key Products

3.1 Firewood, Compressed wood and Kindling

The supply of firewood, kindling and coal has changed since 1994 and this has been a strong and growing market but still subject to the normal seasonal demand.

Main Suppliers of Fuel Products All Counties 1994 to 2001

	Total Area		**Essex**		**Norfolk**		**Suffolk**		**Cambs.**		**Herts.**	**Beds.**
	1994	**2001**	1994	**2001**	1994	**2001**	1994	**2001**	1994	**2001**	**2001**	**2001**
Local	48	36	50	43	20	50	43	20	60	40	20	40
BFL	37	9	50	0	60	17	43	0	20	20	20	0
CPL	15	55	0	57	20	33	14	80	20	40	60	60

Local suppliers and BFL have lost market share to CPL, the major player in the region and indeed nationally. A major supplier of coal, charcoal and other fire sundries, CPL also supply DIY stores, sheds and garden centres with fuel products.

A major advantage for CPL is their ability to deliver small lots of all types of product all year round. Their extensive network of distribution centres and transport means they have been able to keep overall costs down and expand their product range. Indeed CPL Distribution have recently begun a Home Service and will enter the market for a whole range of garden products available on-line or through mail order, delivered direct to customers homes. Their product range will include:

- garden buildings
- fencing
- sheds
- sleepers
- gates
- other heavy garden products such as paving, gravel etc

This will put them into some conflict with their garden centre and DIY customers but the long term effects cannot be judged at this point.

Coal products and smokeless fuels are the key products, but sales of wood have kept up well in the region. Kindling is sold from £0.50 to £1.05p per bundle and logs from £2.99 to £3.99 per net.

This is hardly any change from the prices paid in 1994 when 10kg of split logs was between £2.50 and £3.50 and kindling was sold for between 50p and 99p per plastic bag.

CPL has also replaced the local suppliers who provided the garages with kindling in 1994. CPL now also delivers the bulk of kindling and compressed wood logs to this sector, including the imported North American products.

3.2 Charcoal

The research findings seem to indicate that the stocking of charcoal is declining. But the majority of garages visited indicated quite strongly that barbecue charcoal would be stocked in the summer to cater for the home market. Sales have been steady rather than growing strongly and we believe that between 80 and 90% of garage forecourts would stock Charcoal from May to September.

CPL is again the major supplier and the share of CPL to local merchants and other suppliers is similar to that of fuel wood and kindling; the strength of the CPL product and distribution package can therefore be seen. This means that CPL has an estimated 50% of the market with local suppliers and merchants accounting for the remaining 50%. This is as it was in 1994 when one big supplier BFL dominated the general market.

Suppliers other than CPL noted in East Anglia included:

- CPS of Norwich
- Owl Hall Farm
- Big K

The prices for charcoal in 1994 were approximately £1 per kg retail. Now prices range from as low as £5.99 for a 10kg bag of Big K to £2.68 for a 3kg bag of local charcoal.

3.3. Other Products

- Furniture is still mainly sold in Essex by a limited number of entrepreneurial garages with access to local producers. They are not mainstream products but do use softwood for the rustic look furniture as well as the more sophisticated styles made in workshops

- There has been an increase in the stocking of bird tables and feeders in East Anglia by garages, all of which were locally produced.

4. Market Sizes

The market size for wood products was calculated in 1994 on the basis of the data gathered during the fieldwork for sales volumes, prices and proportion of stockists. The same process has been used to calculate the market size for 2001. It will be noted that we have combined some product areas.

The market has grown since 1994, from £5.6 million to £6.9 million in 2001 at RSP. The market in Hertfordshire and Bedfordshire is estimated to be £1.9 million in 2001.

Calculation of Market Size through Forecourts All Counties 1994 to 2001

	1680 Outlets in East Anglia 1994					
	% Stocking	Number	Unit Sales/a	Unit Price	Sales per a	Market size
Charcoal	*70*	1176	480	3.5	1680	1,975,680
Firewood	50	840	1040	3	3120	2,620,800
Kindling	70	1176	520	0.6	312	366,912
Compressed wood logs	29	487	390	3	1170	570,024
Other Products						50,000
Total Market						**5,583,416**

	1680 Outlets in East Anglia 2001					
	% Stocking	Number	Unit Sales/a	Unit Price	Sales per a	Market size
Charcoal	*75*	1260	500	3	1500	1,890,000
Firewood	60	1008	1100	3.5	3850	3,880,800
Kindling	70	1176	600	0.7	420	493,920
Compressed wood logs	24	403	400	4	1600	645,120
Other Products						50,000
Total Market						**6,959,840**

	450 Outlets in Hertfordshire and Bedfordshire 2001					
	% Stocking	Number	Unit Sales/a	Unit Price	Sales per a	Market size
Charcoal	75	248	500	3	1500	506,250
Firewood	60	270	1100	3.5	3850	1,039,500
Kindling	70	315	600	0.7	420	132,300
Compressed wood logs	25	113	400	4	1600	180,000
Other Products						15,000
Total Market						**1,873,050**

There has been a rise in the proportion of garages stocking firewood to an estimated 60%, up from 50% in 1994. This has been driven by increase in centralised purchasing of all types of fuel by the larger garage chains and increased availability of split logs. There is still however room to grow the number of outlets stocking fuel wood and kindling.

5. Purchasing

As in 1994, attitudes to purchasing were collected and have been analysed to compare with the previous results.

5.1 Decision Makers

Decision Makers by County % of Respondents 1994 and 2001

	Total Area		Essex		Norfolk		Suffolk		Cambs.		Herts.	Beds.
	1994	**2001**	1994	**2001**	1994	**2001**	1994	**2001**	1994	**2001**	**2001**	**2001**
Managers	51	38	50	67	70	60	40	100	33	60	33	33
Owners	15	31	0	17	20	20	20	0	67	20	0	33
Centralised	23	30	50	17	10	20	40	0	0	20	67	33

The table reflects the fact that owners carry the main responsibility for purchasing in private garages but in the major chains there is now a higher degree of centralised purchasing decisions being made.

5.2 Factors Influencing Purchasing

The factors taken into account when purchasing stock were rated on a scale of 1 to 5 where 1 is not at all important and 5 was very important. As in 1994 the views on customer’s ratings of factors are also given.

Rating of Purchasing Factors 1994 to 2001

	Total Area		**Essex**		**Norfolk**		**Suffolk**		**Cambs.**		**Herts.**	**Beds.**
	1994	**2001**	1994	**2001**	1994	**2001**	1994	**2001**	1994	**2001**	**2001**	**2001**
Buying British	1.5	2.9	2	3.0	1.3	3.5	1.4	1.8	1.5	2.8	2.3	2.7
Buying local	1.6	2.8	2	3.8	1.8	3.8	1.4	2.0	1.5	3	2.5	3.0
Environmental label	1.6	3.5	1.4	3.2	1.3	3.2	1.1	2.3	2.5	3.6	4.0	2.7
Price	4.7	4.5	5	4.2	4.7	4.0	4.2	3.8	5	4.6	4.0	4.7
Product quality	4.4	4.7	3.5	4.0	4.7	4.2	4.8	3.0	4.5	4.6	4.5	4.7
Service quality	4.4	4.6	4.3	3.6	4.2	4.6	4.1	2.8	5.0	4.4	4.3	5.0

There has been a raising of the importance of features since 1994, particularly in buying British and in buying environmentally friendly products. Centralised buyers who wish to comply with corporate environmental policies have driven these increases. Even so the most important commercial factors are still price, product quality and service.

Respondents were asked if they had a policy to buy/promote British or local or ‘green’ products.

Buying and Promotion Policy % of Respondents 1994 to 2001

	All Areas		**Essex**		**Norfolk**		**Suffolk**		**Cambs.**		**Herts.**		**Beds.**	
	Yes	No	Yes	No	Yes	No	Yes	No	Yes	No	Yes	No	Yes	No
Buy British 1994	23	77	13	87	20	80	22	78	66	34	0	0	0	0
Buy British **2001**	31	62	75	25	100	0	50	50	60	40	80	20	50	50
Promote British 1994	0	100	0	100	0	100	0	100	0	100	0	0	0	0
Promote British **2001**	31	62	75	25	100	0	50	50	60	40	80	20	50	50
Buy Green 1994	6	94	0	100	0	100	0	100	23	67	0	0	0	0
Buy Green **2001**	31	59	50	50	40	60	50	50	40	60	50	50	50	50
Promote Green 1994	0	100	0	100	0	100	0	100	0	100	0	0	0	0
Promote Green **2001**	31	59	50	50	40	60	50	50	40	60	50	50	50	50

Overall there has been a reportedly major change in the attitude to buying British in some counties since 1994, notably Essex, Norfolk and Suffolk. There has however been an even bigger change in the attitude to green products, both buying and promoting across the board.

The environmental friendliness of wood related products is on the agenda of the major oil companies and clearly successful suppliers will be able to demonstrate their ability to comply with the needs of the big customers on the forecourts.

For practical purposes however the majority of locally supplied products are not under threat as such, but this does partly explain why the local producers have lost some market share to suppliers with ‘green’ credentials.

Respondents were asked what their impressions were of British manufacturers, the answers rated on a scale of 1 to 5 where the limited number who did outsource had experience.

Impressions of British Suppliers 1994 to 2001

	Total Area		**Essex**		**Norfolk**		**Suffolk**		**Cambs.**		**Herts.**	**Beds.**
	1994	**2001**	1994	**2001**	1994	**2001**	1994	**2001**	1994	**2001**	**2001**	**2001**
Quality of goods	3.5	3.8	3.3	4.0	3.5	4.0	3.4	3.7	3.6	3.7	4.0	3.7
Price competitive	3.6	3.6	3.6	4.0	3.8	3.5	3.2	3.3	3.6	3.3	3.8	3.7
Value for money	3.4	3.6	3.2	4.0	3.6	3.8	3.0	3.3	3.6	3.3	3.3	3.7
Supply small lots	4.0	3.7	3.6	4.5	4.0	3.5	4.2	3.3	4.0	3.7	3.5	3.5
Supply large lots	3.7	3.8	3.7	4.0	3.4	3.8	3.8	3.3	4.0	4.3	3.8	3.7
Quality of service	3.7	3.9	3.2	4.3	4.3	4.0	3.6	3.3	4.0	4.0	3.8	4.0
Speed of delivery	3.7	4.0	3.3	4.3	3.6	4.0	3.6	3.3	4.3	4.3	4.0	4.0
Environmental label	2.7	2.8	2.7	0.0	3.1	3.7	2.7	3.3	2.6	3.3	3.5	3.0

British suppliers have slightly improved their offering across the board of service, delivery and price since 1994 and little can be added to the overall picture.

In the area of environmental credentials however the relatively low ratings are in part due to the lack of knowledge on the part of the garage sector, but also points to a major lack of awareness of the whole environmental issue regarding wood products from the suppliers as well.

It can also be said that respondents in this sector are very confused as to what and who it is that is supposed to be satisfied when it comes to being environmentally friendly. Many purport to support the issues but do not promote products, nor are they under pressure from the public to offer these products. Once again there is no suggestion that any premium would be paid for green labelled products by consumers.