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Market Report for IPM ESSEN 2026:

“Green gets under your skin!” – “Green is good for you!” also in 2025

Less is being consumed – but with more love

2025 was once again a relatively stable year for horticulture and for the sale of flowers and plants in general, despite the well-known multiple crises and uncertain consumers. In Germany, total sales of flowers and plants amounted to EUR 8.5 billion – around 2% less than in 2024. The trend of recent years continues: in monetary terms, sales or market volume are broadly being maintained, but not through the quantity of flowers and plants sold – rather through price. Less is being consumed, but with more love. How does that come about, and what do consumers love?

Green in the “wagon-fort”

The market and media research institute Rheingold regularly conducts depth-psychological interviews with test persons from German society. A clear finding of a recent study is that, in times of supposedly uncontrollable crises and a sense of powerlessness, people are retreating into the private sphere even more than two years ago. In the study, 93% of Germans say they are making their home a safe place of retreat. 86% focus on their hobbies and leisure activities. The author of the study speaks of a “wagon-fort mentality” in which customers feel comfortable primarily within their own four walls and – interestingly – when shopping. Two observations that are generally beneficial for the sales of flowers and plants. In this state of mind, horticulture, with its wide range of products, offers exactly the right solutions and “legal mood lifters” for personal wellbeing.

Garden centres offer room for small escapes

Studies show that consumers are increasingly looking for breaks from everyday life. Against this backdrop, it is becoming ever more important for specialist green retailers to design and offer appropriate spaces.



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Especially through staff in sales, meeting spaces can be created where customers feel valued.

Your own garden: more pleasure than burden

Against the backdrop of the growing “wagon-fort mentality”, it is not surprising that, according to the STIHL Garden Barometer 2025, most garden owners perceive their garden as a joy and as a place where they feel connected with nature. 84% of respondents say they see the garden as a place of relaxation and recreation where they like to spend time.

43% perceive gardening itself as something positive and look forward specifically to “digging”, harvesting and sowing. The reasons for this enjoyment: they can see the success of their work and their impact directly, while at the same time recovering from everyday life and daily stress.

Trends remain unbroken

Sales staff in garden centres and retail nurseries confirm that consumers are increasingly declaring their own garden and balcony as a personal place of retreat. As has been observed in recent years, they are also increasingly concerned with self-sufficiency and growing their own fruit and vegetables. When choosing plants, consumers are increasingly paying attention to climate tolerance and sustainability. Plants that withstand heat, drought and heavy rain are preferred, and plants that promote biodiversity and are insect-friendly are becoming more and more established.

Overall, it can be observed that end consumers are bringing less and less specialist knowledge about plants and gardening, meaning that low maintenance and robustness are now further attributes of successfully marketed plants.

Accordingly, the range of products that meet these criteria is continuously growing in horticulture. Where new sales concepts emerge, they do so against the backdrop of these requirements. In 2025, there are hardly any points of sale that do not address these customer wishes and promote corresponding assortments.

Bedding and balcony plants season 2025

This is also confirmed by a 2025 survey by the Offices for Food, Agriculture and Forestry (AELF) on the situation of sales of bedding and balcony plants in Bavaria. For example, 48% of respondents observe growing demand for bee- and insect-friendly plants. With regard to overall sales, the market analysis attests to good to very good sales, although opinions on turnover and the overall season assessment in individual cases diverged even more than in 2024. 39% of respondents rated the season as good to very good, while 18% described the season as poor. Remarkably, in monetary terms, sales across all product groups increased again compared with the previous year. This statement applies particularly to perennials, herbs and young vegetable plants, as well as products from in-house and regional production. In terms of quantities, however, sales fell for 60% of respondents.

Valentine's Day and Mother's Day business "very pleasing"

Valentine's Day and Mother's Day are always a very important indicator for the industry in the trade of flowers and plants. According to a survey by the flower wholesale association BGI e. V., both sales events went very well in 2025.

On Mother's Day, revenue increases at a solid level of 5% to 10% were recorded, although specialist florists purchased price-consciously and scarcely dared to buy higher-priced branded goods. The average receipt for a floral gift remained at a low level of EUR 25 to EUR 30 in 2025. The revenue gains were therefore not due to rising prices, but indeed to increased demand for flowers and plants. Consumers simply bought more – not only from florists, but also from grocery retailers, whose offering in the lower price segment is growing ever larger and which, due to the declining number of florist shops, is increasingly becoming an alternative shopping option for consumers looking for flowers and plants.

Valentine's Day performed even better than Mother's Day. The widely forecast reluctance to buy did not materialise; consumers purchased uninhibitedly – especially roses – in red and dark pink shades. Revenue increases of 20% compared with the previous year were the norm.

Slight growth in export markets

When looking at the flower and plant market overall, it is always very interesting to look to the Netherlands as the world's largest trading platform for flowers and plants. At the time this IPM market report was compiled, the analysis by the Dutch wholesale association VGB, based on Floridata export statistics through the third quarter of 2025, was available. The observations in Germany of stable turnover with lower quantities are also confirmed here. Dutch total exports of flowers and plants rose by 2.4% compared with the same period of the previous year, reaching a volume of EUR 5.7 billion. However, volumes in some areas fell short of expectations. The total comprises an export value of around EUR 3.5 billion for flowers and EUR 2.2 billion for plants.

A closer look at the assortments is revealing. For flowers, the monetary value rose by 1%, while the quantity sold (stems) simultaneously fell by 4%. This means consumers are still buying flowers, but bouquets are getting smaller or contain fewer stems.

The picture is different for plants. Here, exports grew by 5% in monetary terms and by 3% in terms of volume (pots). According to market experts in the Netherlands, plants are performing particularly positively compared with the last four years. Growth rates for plants in the first three quarters had not been observed since 2021. A stable supply is meeting good demand.

New export markets are becoming more important

Germany, the United Kingdom and France are by far the three most important destination countries for Dutch flower and plant exports. Sales there are characterised more by stagnation than by growth. A decline of 0.7% is reported for Germany and stagnation of 0% for France. Sales to the United Kingdom show a small plus of 1%. The Netherlands record exceptionally strong growth in Poland and the USA.

Pressure on companies is increasing

Even though the Dutch export situation and German demand show slight growth, the cost side remains problematic. Labour, energy and transport costs continue to rise and, given political and geopolitical uncertainties such as import tariffs, are difficult to plan.

This is also confirmed in Germany by analyses from the Centre for Business Management in Horticulture (ZBG). Costs are rising disproportionately in businesses.

A tenth fewer businesses in four years

Rising costs are often cited as a reason for the closures of horticultural businesses. In 2025, the Federal Statistical Office once again surveyed the number of horticultural businesses and data on the production of flowers and ornamental plants in Germany. Compared with the last survey in 2021, the number of businesses fell by 304 to 2,821 horticultural businesses – a decline of 9.7%. At the same time, the cultivation area decreased by 505 ha to 5,760 ha, a decline of 8.1%.

The most popular plants grown are violas, heather (Calluna), perennials, geraniums and primroses.

Halved in twenty years

According to mex.das marktmagazin, the number of flower shops has almost halved over the past twenty years, from 20,000 to 10,600. No matter which region of Germany you look at, it is becoming increasingly difficult to find a traditional flower shop. Flower wholesalers in particular feel this development very strongly and have been adapting to the changing conditions for years. The decline of florists' shops is often due to a lack of succession and historic locations, coupled with shifts in turnover towards chain and system retailing. Rising costs are accelerating the trend.

The loss of specialist florists is only partly compensated by grocery retailers. It is interesting to note that, over the past ten years, a total of 70,000 retail stores have closed in Germany.

Even as traditional florists' shops close, new start-ups of workshop florists have been observed for several years. These often focus on cut flowers and operate from garages and workshops, positioning themselves differently in the market than classic florists' shops. Changing demand has a direct impact on regional producers of potted plants, whose sales are collapsing. Not for nothing, around 20% of producer businesses in Hamburg have stopped operating over the past 20 years.

Flowers are the number one token of affection

Given these developments, it is not surprising that the prevailing opinion in the industry is that the popularity of flowers as gifts is declining drastically. In this context, the research conducted by BLUME 2000 prior to its current market entry in Austria is interesting: they wanted to clarify who is actually happy to receive flowers and who gives which flowers to whom for which occasion. The study found that for more than 60% of the population, flowers are still the number one “interpersonal token of affection” – whether to congratulate someone on special occasions, to say thank you among friends and family, or simply to make someone happy. Men from the baby boomer generation in particular give flowers several times a year. Overall, around 20% of all respondents buy a bouquet at least every two to three months, as 60% of buyers see a bouquet as a way to quickly bring someone joy.

Alongside gifting, self-gifting is increasingly on trend, especially among women. Around a quarter of flower purchases now fall into the self-gifting category. Clear favourites are still tulips (60%) and roses (41%). When it comes to gifting, it is the other way around: classic roses (54%) are given as gifts, followed by tulips (42%).

Flowers and plants are often in women’s hands

In parallel with the research on flower purchasing habits in Austria, a survey commissioned by Austrian garden centres provided exciting insights into habits around dealing with flowers and plants. The key finding is that women (56%) devote themselves much more to caring for indoor plants than men (37%). Tasks such as watering, removing dead leaves, repotting or propagating plants are often carried out by women.

When it comes to care, the commitment of the “older” generation stands out once again. The lower engagement of younger generations is due in part to the fact that 20% of younger people do not own any indoor plants. Indoor plants receive particularly high attention in childless couple households.

In the garden, there is often a clear division of tasks. While overall responsibility usually lies with hobby gardeners (mostly women), hobby gardeners (mostly men) tend to provide support with regular lawn mowing, trimming hedges and shrubs, and removing leaves.

Interestingly, beyond basic garden care, only 20% of respondents carry out more advanced care measures such as targeted pest control, plant protection and fertilisation. The market researchers explain the phenomenon of neglected plant care by a lack of knowledge among garden and plant owners.

Sustainability reporting will soon be a matter of course

The topic of sustainability in the green sector remains acute and is implemented day by day; however, in view of the multiple challenges, both consumers and companies are currently in a “wait-and-see position”. At present, 63% of customers in garden speciality stores hardly ever or never ask about biodegradable pots; 11% consider this topic important.

But since Germany aims to produce climate-neutrally by 2045 at the latest – and the EU by 2050 – CO₂-neutral operations and thinking and acting in circular systems will be a matter of course in a decade and a half, as will the associated sustainability reporting.

Accordingly, the ZBG has been researching for some time a practical solution for how horticultural businesses can consistently become even more sustainable and communicate this credibly and verifiably throughout the value chain, including to end consumers.

A “light” supply chain law is coming

Last year, the supply chain law preoccupied the sector and generally caused uncertainty. Questions about when and how it would be implemented had a major impact on bureaucracy in the industry. According to a decision by the Legal Affairs Committee in the EU Parliament, a “light” version of the EU supply chain law is now coming. This is intended to significantly simplify the EU supply chain law and sustainability reporting. A key point will be that the scope of application is to be reduced significantly: for sustainability reporting to companies with 1,000 employees and EUR 450 million in annual turnover, and for the supply chain law to companies with 5,000 employees and EUR 1.5 billion. As a result, only a “handful of companies” in Germany will still fall under the obligations. However, the topic of supply chain responsibility itself remains. The status quo achieved will be maintained.

Consumers are saving ... for flowers?!

In the Dentsu Consumer Navigator Report, 3,800 people in five European markets were asked to assess their own economic situation. The result: European consumers largely rate the current economic situation as poor and look to the future skeptically. With 73%, almost three quarters of respondents describe the current situation in Europe as “not good” or “bad”. This affects consumer behaviour and willingness to spend – including on flowers and plants. 64% of respondents reduce their spending due to perceived economic challenges and consume much more consciously by prioritising basic needs and postponing larger purchases.

These statements also apply to Germany, where 42% of respondents reduced their spending in the past year, while more than half (58%) say they can cover their necessary expenses (EU average: 53%).

It is interesting to look at the assessment by generation. Compared with Generation Z or millennials, the baby boomer generation views its own situation much more pessimistically. Only 17% of boomers rate the economic situation as “good”, whereas 41% of Generation Z describe their economic situation as “good”. Translated to the flower market, this means that existing customers are far more sensitive about buying flowers and plants than younger generations, who, unfortunately, have not yet learned the habit of consuming flowers and plants.

The consequences could be seen in the 2025 Advent business. Traditional Advent buyers – boomers and Best Ager – held back at Christmas 2025 and bought very cautiously, according to ad-hoc surveys.

Conversely, a prudent but emotionally highly involved purchasing approach, especially among younger buyers, can revive sales of flowers and plants through classic impulse purchases. The crucial point is that younger customers need to learn to consume flowers and plants and regard it as a matter of course. This works above all through a different framing of the products with regard to health, quality of life, ecosystem services, etc., and through different communication via social media.

Boosting demand via social media platforms

More and more people use social media platforms to find information and search for new products and ideas. More than half (52%) use Instagram, TikTok and the like to find new products and learn about new offers. For young people, social media has now become reality. For the study “The new social reality: Gen Z and Gen Alpha on TikTok & Co.”, 30 people aged 11 to 26 were interviewed depth-psychologically about social media. It became clear that the participants’ screen time is six to twelve hours per day – but this is not perceived as such by the generation. As a result, the separation between digital and analogue is almost entirely dissolved. TikTok is of great importance for young people to realise themselves. Other platforms such as Instagram, on the other hand, tend to deliver external content, and YouTube is perceived as a knowledge and learning platform.

If you want to resonate with young consumers for flowers and plants, you have to enter the new reality of the target group and be present on social media platforms – this is the emphatic demand of retail experts.

Quality beats price

“Fast commerce” platforms such as the Chinese providers Shein and Temu are gaining relevance. 32% of consumers surveyed across Europe say they shop there at least once a month. It is very interesting that in Germany, “only” 21% of respondents buy from a fast commerce provider at least once a month. This suggests that consumers in Germany are still considerably more sceptical of these providers. German customers may appreciate low prices, but they place greater value on quality. The garden market therefore also offers corresponding potential for high-quality products.

What’s next? Horticulture is right in the middle of transformation!

At the end of 2025, high-ranking scientists and representatives of the horticulture sector met in the Netherlands. It became clear how strongly the sector is undergoing transformation with regard to the energy transition, digitisation and plant protection. Impressive verified facts on sustainable cultivation methods show that, in the last ten years alone, the use of environmentally harmful plant protection products (top 10 = ten most popular products) has been reduced by 78%. In cooperation, companies in the value chain, together with a network of breeders,

technology companies, knowledge institutes and logistics partners, are driving topics such as digitisation, energy and circular economy forward, so that in two decades horticulture will be fully digitally networked and growers worldwide will exchange flowers and plants via a shared platform. But the way flowers and plants are communicated will also change. Horticulture must come into the public spotlight as a future-oriented sector that offers quality of life and health.

Rethinking flowers and plants!

The industry's fear of declining sales figures stands in stark contrast to the increasingly discussed added values of flowers and plants.

Today, more and more consumers and political decision-makers understand that climate change adaptation, the physical and mental health of the population and even global food security depend centrally on the presence of flowers and plants in our environment. In this context, it is often quoted that horticulture is "part of the solution" to meet the challenges of the future.

Looking at the fact that, according to statistical evaluations (Statista), around 80% of Germany's total population lived in cities in 2024, the question arises as to why horticulture, given the country's high level of urbanisation, is not much more strongly represented in urban areas. It is no coincidence that the central motto of the IGA 2027 in the Ruhr region is: "How do we want to live in the future?"

To provide precisely these impulses for urban horticulture, there is, for example, INUGA. The Innovation Network for Urban Horticulture met at the end of June 2025 with numerous representatives from horticulture, industry and various ministries to discuss urban horticulture and exchange ideas on how horticultural products can be thought of innovatively and anew in urban spaces. The focus was on putting plants more into application in a new context and anchoring them across society.

In this context, the remarks of Prof. Dr. Mazda Adli were particularly interesting. Dr. Adli is Chief Physician at the Clinic for Psychiatry and Psychotherapy at Charité Berlin and researches the influence of city life on mental health – so-called "neurourbanism". From this perspective, he views urban horticulture from a medical standpoint and is convinced that research provides sufficient arguments to monetise urban horticulture

under public-interest aspects and to develop business models. Research shows that, with a higher percentage of urban green space around one's home, the brain runs more calmly in stressful situations. From a health economics perspective, according to research, living in the city is associated with a 1.5-fold increased risk of depression. Green spaces, in turn, demonstrably counteract this risk. His conclusion: "Green gets under the skin and straight into the brain!" The problem in Germany, he says, is that these findings are not yet being taken as far as, for example, in the UK. There are already models such as "social prescribing", where the health insurer virtually pays for an entry ticket to a green space or another measure that includes a green intervention.

The Federal Ministry of Agriculture, Food and Regional Identity called on horticultural entrepreneurs to engage intensively with the INUGA results and to discover new future fields for their work.

Horticulture offers more experience per square metre

More than ten years ago, a German DIY store chain announced that it would no longer measure the success of its retail facilities only by the classic key figure "turnover per square metre", but would reorient towards "experience per square metre". This means horticulture competes directly on experience with theme parks, gastronomy, travel providers and online shops. What they all have in common is the attempt to give people a good time and experiences – experiences that bring joy.

Creating experiences above all means being on the sales floor when the customer is there. From an expert perspective, it is increasingly evident that consumers appreciate personal communication all the more the more it is being reduced in their own industry and in other sectors. Occasions for staging flowers and plants are becoming more and more numerous.

New sales formats

In Germany and across Europe, special sales days such as "Black Friday" and "Cyber Monday" have become increasingly common and have now been learned by customers. In 2025, Singles Day was added in November for the first time as the next shopping holiday. This holiday comes from the Far East and was originally intended for singles in China. It has now become established in China as a fixed shopping event with discount battles. The question is whether this day will also become established in

Europe and what role flowers might play on Singles Day in the future. The target group could certainly be interesting, as it is not to be located among the classic bargain hunters.

Conclusion

The observations show that horticulture is relatively stable, but not a given. It offers great products whose potential should be much more strongly anchored among the population under the aspects of health, quality of life and the common good. Science has long since recognised it: “Green gets under your skin!” – “Green does you good!”

Horticulture is currently undergoing transformation. To implement this transformation successfully, the future requires cooperation, but also courage and openness to change. As every year, IPM provides the platform for the sector to do exactly that.

Because, as Eva Kähler-Theuerkauf, President of the German Horticultural Association, puts it: “Horticulture is a future craft – we shape living environments and create quality of life!”

The market report was prepared on behalf of Messe Essen for IPM ESSEN 2026 by Andreas Løbke, CO CONCEPT.

Sources:

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- Agrarmarkt Informations-Gesellschaft mbH (AMI)
- Association of German Flower Wholesalers and Importers (BGI)
- Flower Council of Holland (BBH)
- Society for Consumer Research (GfK)
- Vereniging voor Groothandelaren in Bloemkwekerijprodukten (VGB)
- Publications by TASPO – Haymarket Media GmbH
- German Horticultural Industry Association (IVG)
- Publications from the horticulture portal GABOT
- Various expert interviews with those responsible for the sale of flowers and plants from:
 - tree nursery production businesses,
 - ornamental plant production businesses,



- landscaping businesses,
- retail garden centres,
- marketing organisations,
- flower wholesale businesses,
- consultants to specialist florists.