



CBI  
*Ministry of Foreign Affairs*

# The Garden

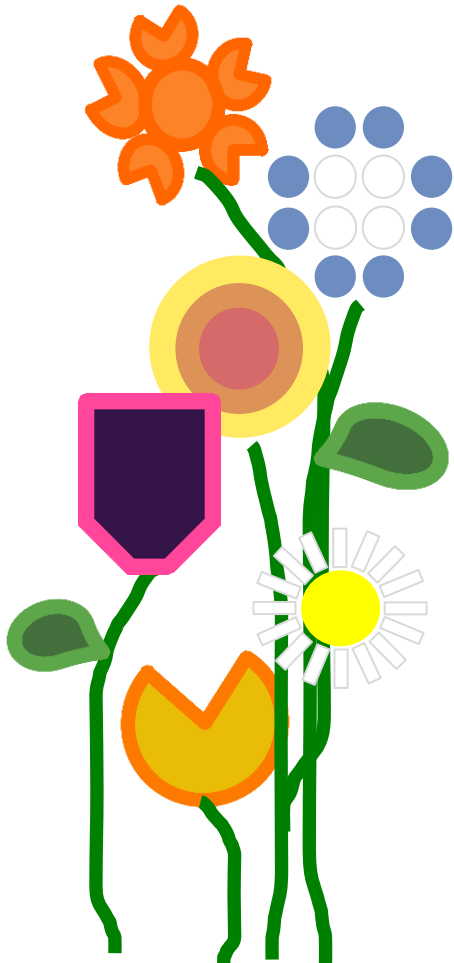
Trend Special 2014

20 November 2014

Centre for the Promotion of Imports from developing countries



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## Connect the product to the trend



biomimicry

the humble  
becomes  
beautiful

indoor  
jungle

alfresco  
dining

inside  
=  
outside

multi-  
functional

Not sure how to connect? Read on! Enjoy our Trend Special!



# THE GARDEN: the domain

Inside



Outside







## The domain - explanation

### **Outdoor garden:**

- Space around the house
- Used for active and passive relaxation
- Forms: planted garden, veranda, balcony

### **Indoor garden:**

- Spaces in the home, decorated with plants as on the window sill or in the living room
- Use of natural images in the home (e.g. floral decoration on dinnerware)

Both the outdoor and indoor garden responds to a number of trends that appear to stem from the same consumer needs.

# THE GARDEN: consumer needs

pleasing the senses

designed to impress

irrigate the soul

grow your own

sanctuary in the city

recreation

'glam-gardening'

in tune with nature

breaking down the fences

indoor jungle

the seasons and all their changes are in me

al fresco dining

not easy being Green

outdoor living

outdoor living (room)



## Consumer needs - explanation

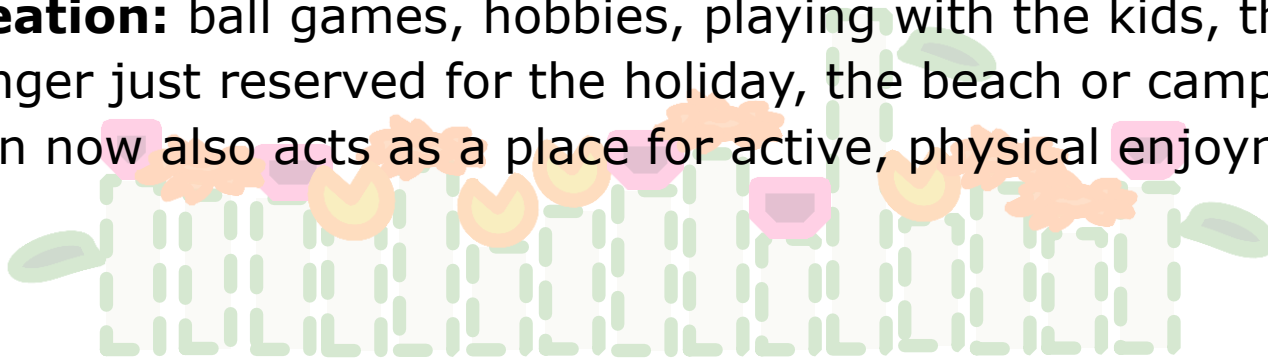
- **Pleasing the senses:** the garden and everything in it gives the consumer a good feeling. All the senses are stimulated.
- **Designed to impress:** the consumer has carefully 'curated' the garden, to project his image. The consumer expresses him/herself through the decoration of the inside and outside areas of the home.
- **Irrigate the soul:** the garden, for many, represents a mental state, a place for recharging or even healing.





## Consumer needs - explanation

- **Grow your own:** 'Make It Yourself', grow vegetables and fruits for one's own consumption, and sometimes even for selling. Not out of necessity, but to derive a sense of achievement and status.
- **Sanctuary in the city:** as opposed to the importance of *being seen* to garden, the consumer also feels the need to hide in an own inner sanctuary, which is the garden.
- **Recreation:** ball games, hobbies, playing with the kids, the pets. No longer just reserved for the holiday, the beach or campsite, the garden now also acts as a place for active, physical enjoyment.







## Consumer needs - explanation

- **'Glam-gardening'**: back to nature with full convenience. Gardening, but keeping the hands clean, not too much back straining, looking good while doing it, and possessing first-class tools.
- **In tune with nature**: the garden is accessible and comfortable throughout the year. Especially important to urbanites, who want to experience the seasons in their garden.
- **Breaking down the fences**: gardening has become a way of bonding and of (re)creating a sense of unity. Gardening together, sharing the experience, has reduced the distance between people.



## Consumer needs - explanation

- **Indoor jungle:** if you cannot do it outside, do it inside. Urban spaces are small. To meet consumers' needs, the industry has invented the balcony garden, the square foot garden or the hanging garden, or even biomimicry.
- **'The seasons and all the changes in me':** nature and the seasons make us contemplate the cycle of life, our own role on earth, and makes us aware of our inner garden. The garden as a place or garden imagery can help us experience this spiritual need.





## Consumer needs - explanation

- **'It's not easy being Green':** We are all part of the global ecosystem, and as we see Mother Earth struggling, we wonder what we can do. We can help by creating a green corridor for animals (bee-friendly garden), by avoiding pesticides and by teaching our kids the joys of nature etc.
- **Al fresco dining:** eating outside is a true pleasure for consumers in countries with climates that do not allow it often. The garden has become an extension of the dining room.







## Consumer needs - explanation

- **Outdoor living:** today's consumer is more health-conscious and tries to look after his well-being and that of others. That, too, amongst all the needs expressed above, remains a basic need fulfilled by the garden.
- **Outdoor living (room):** the garden has become the extension of the dining room. More fundamentally, the garden has become an integrated space at home. The consumer wants to align it with the overall style of the interior, its functionality, its accessories.





## Considerations for action

- Translate consumer needs into buying motives for the consumer shopping for garden products.
- Consumer needs will be expressed differently in different segments, but it will be a good exercise to look at garden products in the light of what needs are being fulfilled for a particular consumer.
- As an exporter, once you are more aware of the underlying consumer needs, you will also have a better understanding of your buyers' needs.

# WHAT: product categories



garden  
furniture



garden  
accessories



garden  
tools



BBQ,  
outdoor cooking



storage,  
cultivation





# Examples of garden categories

## **Garden furniture:**

Active:

- Seats
- Tables
- Furniture e.g. dining

Relaxation:

- Chairs
- Tables
- Benches
- Loungers
- Bean bags
- Hammock
- Stools and side tables
- Any related cushions

## **Garden accessories:**

- Wind chimes
- Candle holders and lighting
- Bird houses
- Figurines
- Planters and flowerpots
- Water features

## **BBQ & Outdoor Cooking:**

- Barbecues
- Outdoor kitchen
- Cooking implements
- Burners and stoves
- Picnicware

## **Garden tools:**

- Implements to help cultivate of plants and flowers, weeding, keeping the garden tidy.
- Hand-powered and electric tools fall under this group.

## **Storage and Cultivation:**

- Sheds and summer houses
- Gazebos
- Large and miniature greenhouses

## **Others garden products:**

Outdoor games/kids, Swimming pools, Decking/fencing/landscaping

**Out of Scope**, as they are:  
industrially-produced, dominated by the Chinese / EU production



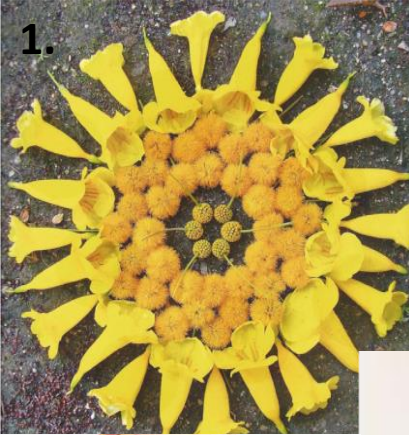
# 7. The garden scrapbook

# Compiled for you!

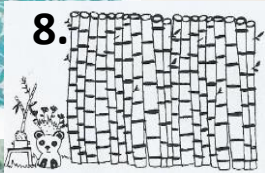
Quite intuitively, we have visualised trends, influences, associations related to the garden as they came to us over the past six months.

We offer you our thoughts and feelings (annex 1), but it may well be that an image speaks quite differently to you!





10.



8.



14.



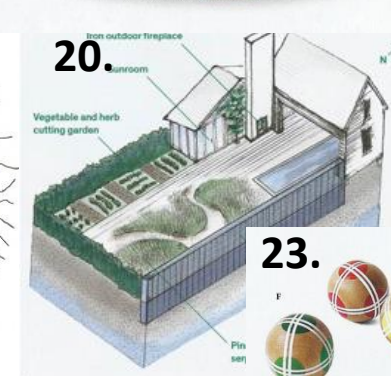
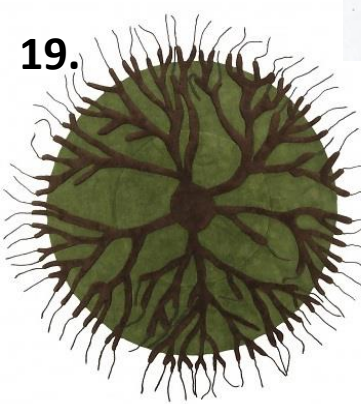
15.



16.



12.



20.



21.



22.



17.



18.



24.



25.



26.





## Considerations for action: start your own scrapbook

Visualisations can be extremely relevant for kick-starting your formal range development process. If you select the images, you are on your way towards creating a mood board for your new collection.

1. Make your own collage, based on what you see in the domain that you are working in.
2. Put them on the wall of your design area or in a scrapbook.
3. Discuss amongst your Design and Marketing Teams.
4. Reduce the results to arrive at new design themes, development ideas, concepts.



# The garden's historical functions



Man was nomadic, lived as a hunter-gatherer. When he settled down, he discovered agriculture.

Growing food in a dedicated space to feed the family.

The Egyptians brought beauty and fun into it, depicting garden scenes even on the walls of their tombs.

Design, combining function and pleasure.

An iconic garden was that of Nebuchadnezzar, one of the Seven Wonders of the Ancient World.

First example of 'vertical gardening' – now seen in urban garden trends



# The garden's historical functions

Origins of the Garden

**The monastic Garden**



**Secluded gardens for food & contemplation**

Origins of the Garden


**The garden as a statement**



**Status gardening**

Origins of the Garden

**Eco-friendly gardening**



**Us and the Planet**

Medieval monastic gardens: functional purpose. Not very far from today's needs.

Sections for herbs and medical purposes, for food, and for private contemplation.

The powerful kings and rulers of Europe in the Renaissance wanted the garden to say something about them.

Garden as the setting for parties and displays of power, wealth and taste!

Today:

In touch with nature, keeping precious links in the ecosystem intact.



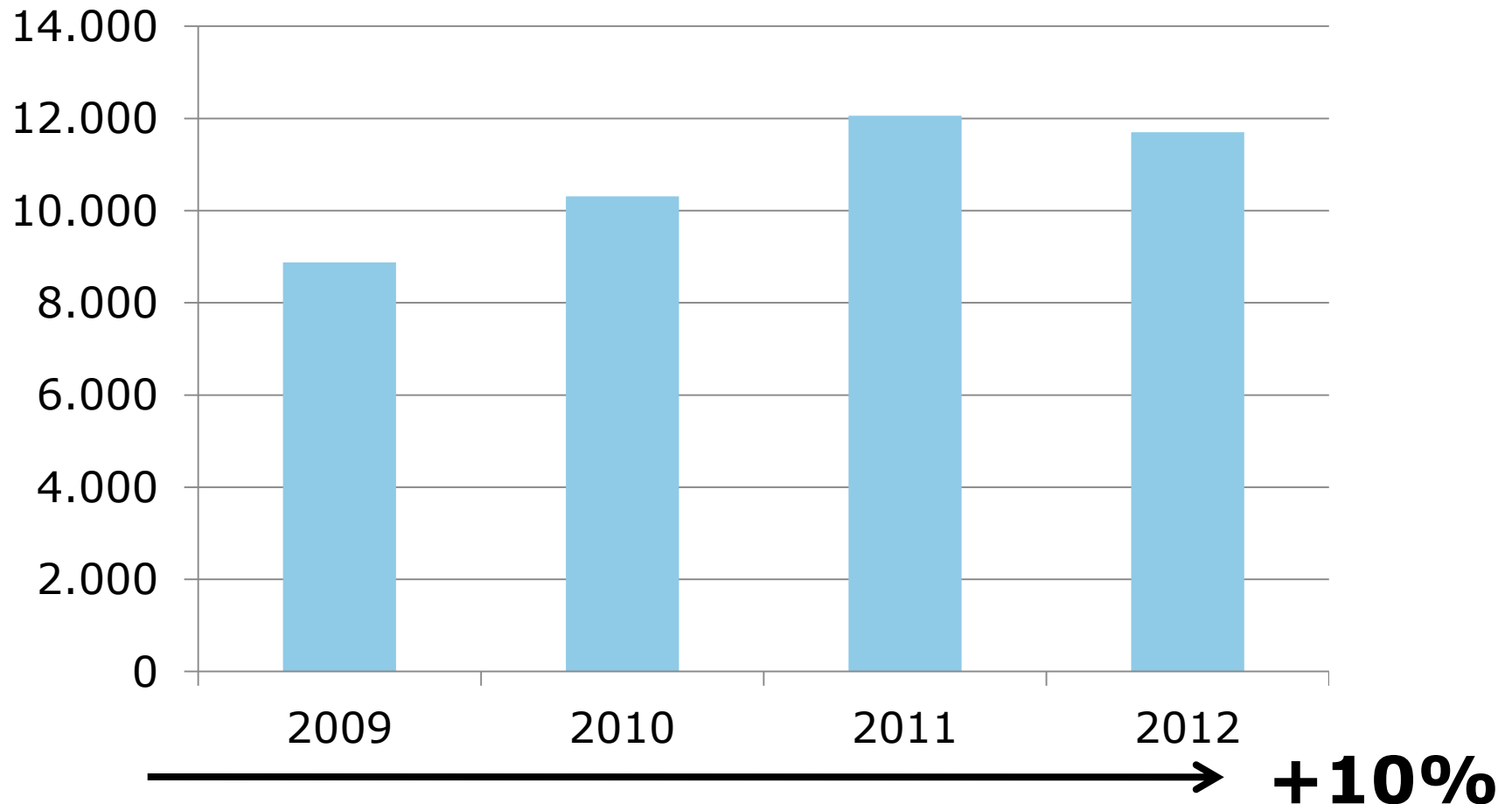
A vertical garden is the background for the slide, featuring numerous small, green, plastic bottle-based planters mounted on a wall. Each planter contains a small green plant, and they are arranged in a grid-like pattern. The overall scene is bright and green, with a soft, slightly blurred effect.

## **The garden – trade statistics**



# European consumption of garden articles

(in: € million)

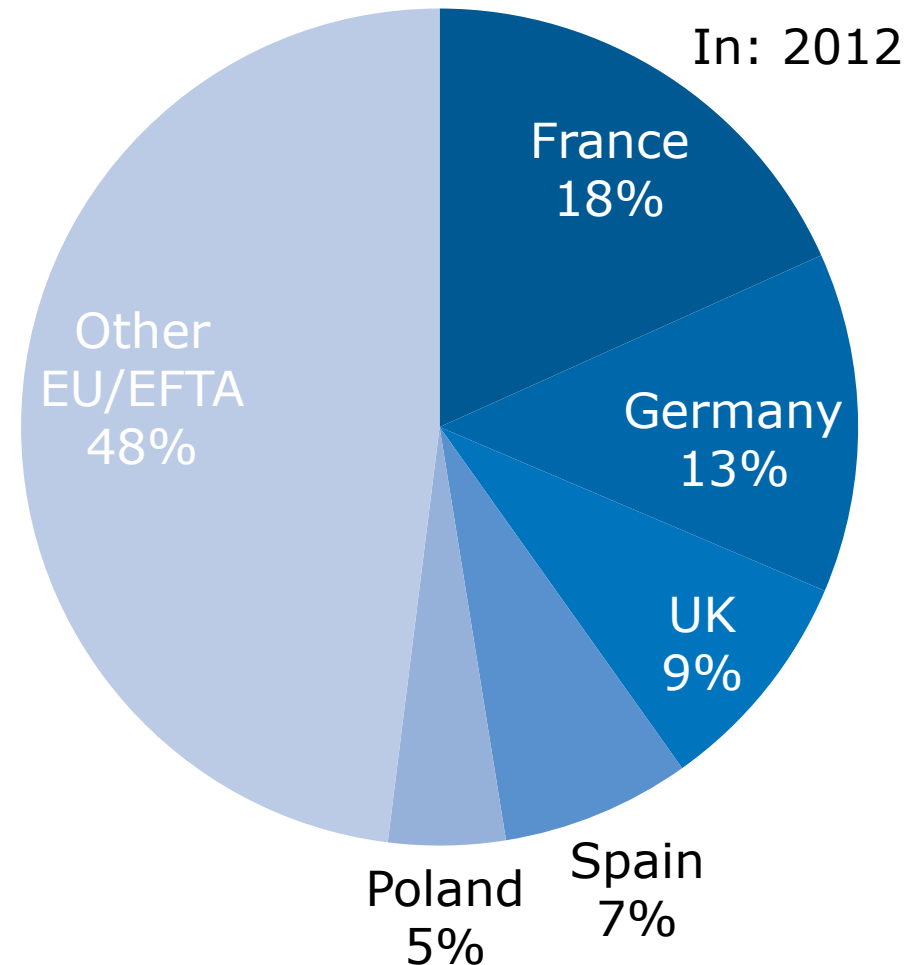




## Garden articles - consumption per country

France and Germany are market leaders in the EU/EFTA

Outlook: Industry sources indicate that demand will grow over the next few years, but remains dependent on weather conditions.

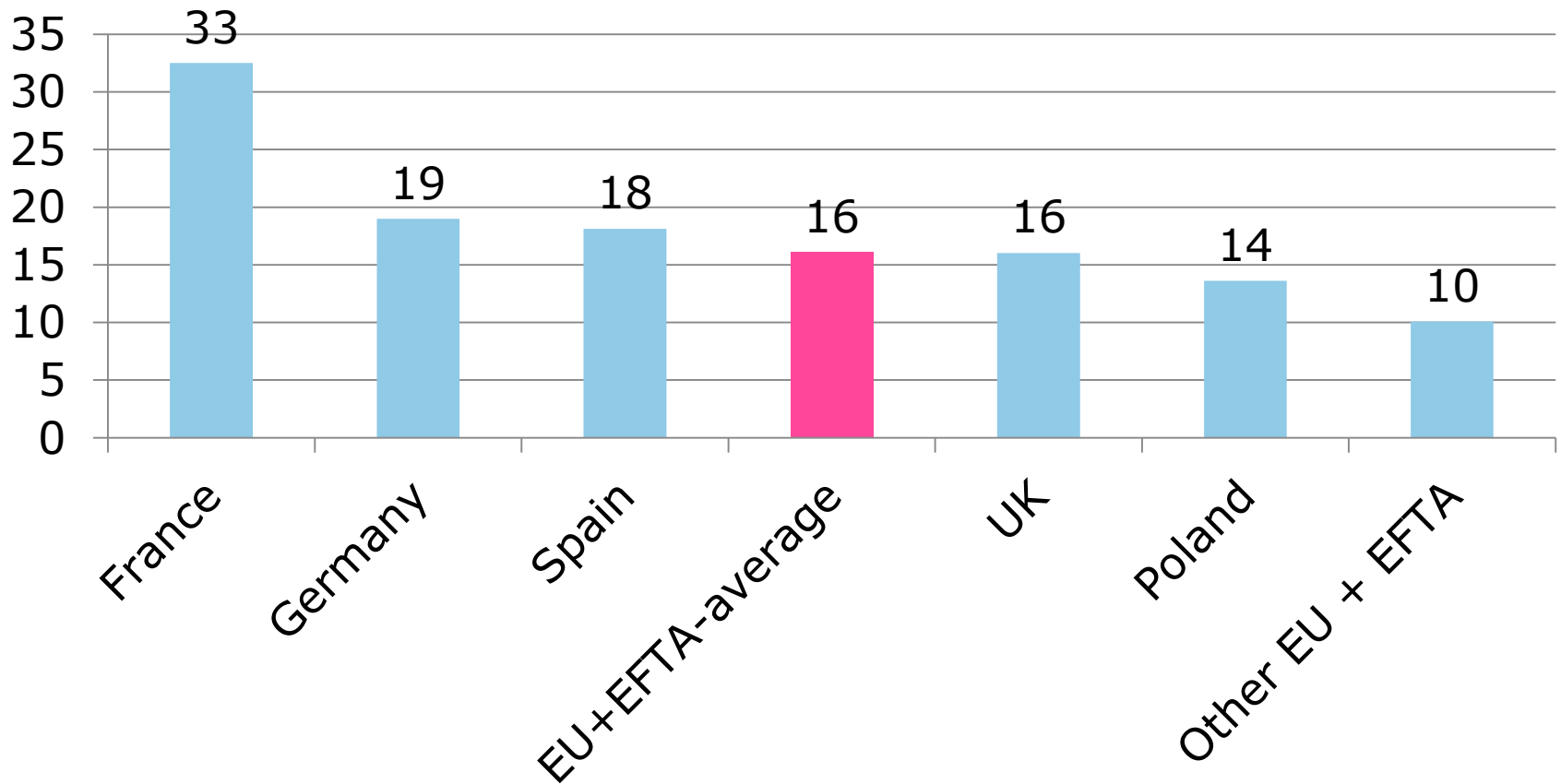






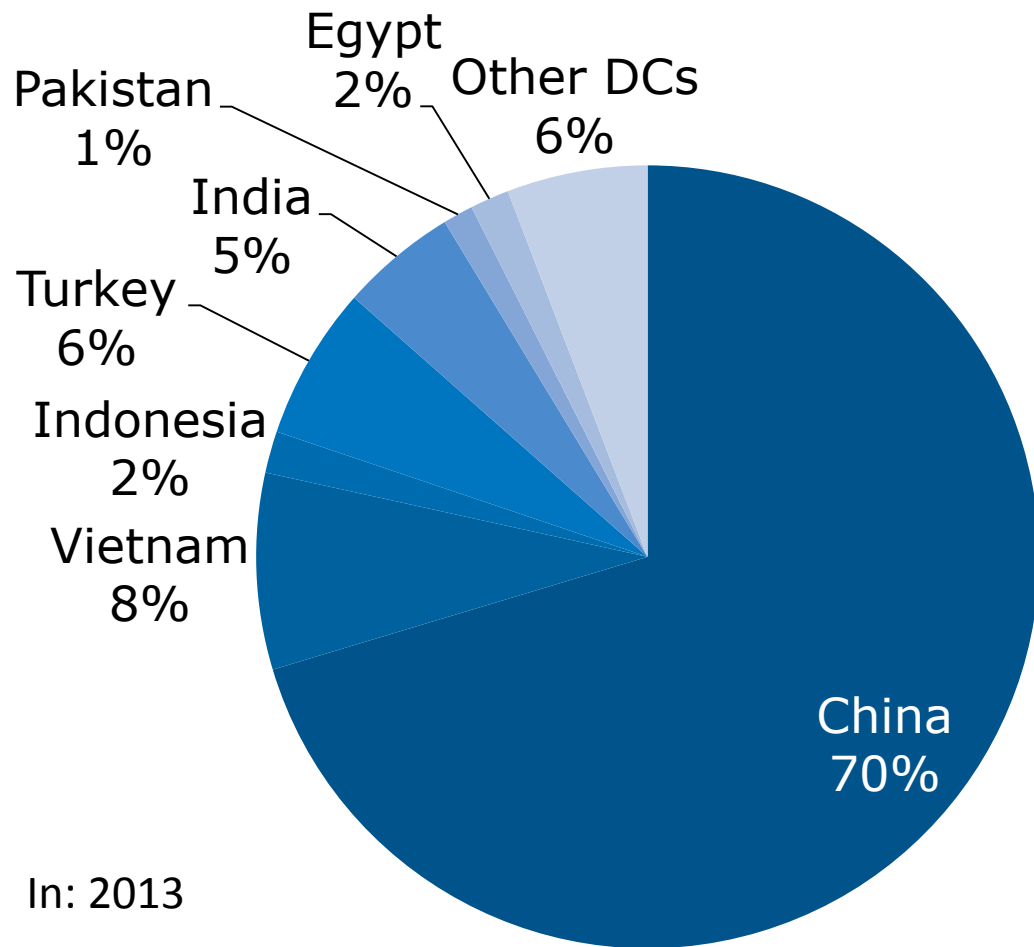
# Garden articles - consumption per capita

(2012, in: €)





## Garden articles - DC suppliers to the EU/EFTA



In: 2013

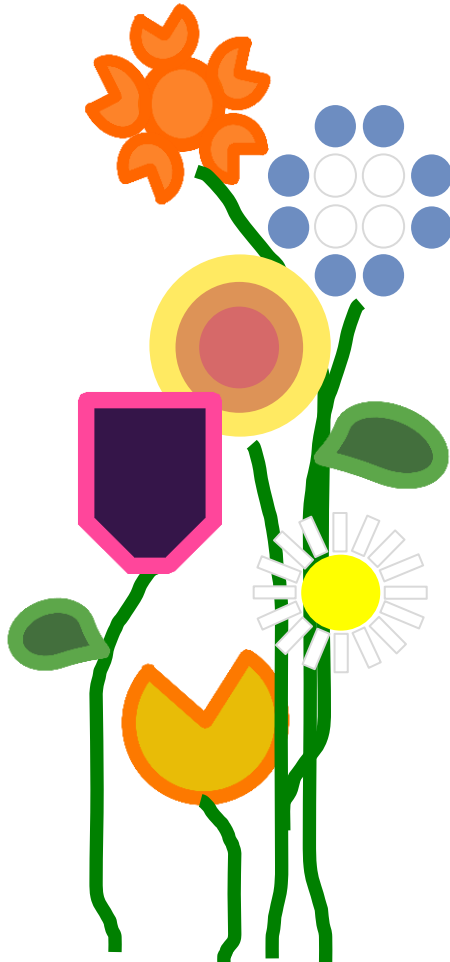
China is the main DC supplier to EU/EFTA.

But other DC suppliers are become more interesting for the EU/EFTA



## Further reading:

- PFS Garden Furniture
- PFS Garden Pots
- PFS Picnic Hampers
- PFS Birdhouses
- PFS Oil Cloth
- PFS Hammocks



This survey was compiled for CBI by  
ProFound – Advisers In Development

in collaboration with  
CBI sector experts Kees Bronk & Steve Pepper

Disclaimer CBI market information tools:  
<http://www.cbi.eu/disclaimer>





## Annex 1: Scrapbook product trends - explanation



1. The *sun* as an array of flowers. Recalling the sun as a life-bringer and taker. The 2014 Maison et Objet trend show discussed 'heliotropism' and the 'pleasures of a garden on a warm summer's day.'



2. *Floral inspiration* in Fashion: can fashion inspire us further?



3. Technology and plants – using your app to water the plants; convenience is important in gardening too.



4. The bird house one-step-further: the *bee station*; what other vulnerable animals can we shelter in the garden?



5. Hermès has a garden scent; bringing the garden indoors to perfume the body



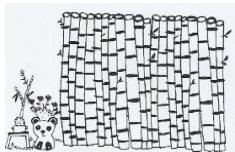
## Annex 1: continued...



6. We *eat and party* outside when we can, and so tableware has come into the garden in a big way.



7. Grow your own – flower seeds in attractive *retro packages with mid-century style floral patterns*.



8. The garden fence is taking off too – we want privacy in the garden. *Space dividers* could be important, as we saw in interiors.



9. The vertical garden, also for indoors.



10. The star amongst plants today: the return of the cactus – *exotic, sculptural and low-maintenance*.



## Annex 1: continued...



11. A huge, woven new hammock style, ultimate luxury, synthetic rattan. Lots of garden inspiration in this picture...



12. Cushions in floral patterns: florals are always present, lots of *different techniques*, from hi-tech photo prints to hand-embroidery, bringing nature indoors too.



13. Man has taken to gardening: *a new consumer* is born.

14. Seating and storage and fireplace – *multifunctional* is always great, besides this being of stunning beauty.



15. The *office* requires garden settings too: the project market can offer a new direction for the garden accessories industry.





## Annex 1: continued...



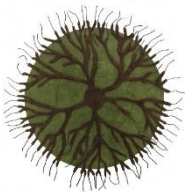
16. Beautifully promoted – glassware as a forest. Your photographs are decisive for your product's impact.



17. Eco-gardening: what can we do to help the consumer *to garden 'green'*?



18. Brew your own – how cool to *grow fruits* that can be used in your own, homemade *cocktails*. How can that trend inspire us?



19. A rug shaped like the roots of an ancient tree. *Humour* always works! (on a more serious level, biomimicry).



20. Houses are now designed with a landscaped garden. It signals a total cross-over of architecture and interior design.





## Annex 1: continued...



21. A major trend, making humble things beautiful; a watering can of great beauty.



22. The Ground Zero garden – how the garden can unify us.



23. Many gardens must be 'children-proof': we want *to play* – another big (macro) trend.



24. Man as the *BBQ Chef*. Give him tools and gadgets!



25. The tree has created a bench...



26. Gardening – uniting us; for all ages.