



IGCA E-News

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President's Welcome

Dear Colleagues and Friends,
We have just returned from a remarkable few days in Tokyo for the IGCA Spring Administrators and Board Meeting. A sincere thank you to the Japanese Garden Centre Association for their extraordinary generosity as hosts, and to the Board and Administrators who travelled from fifteen countries to be there. This association is a truly special family.



Japan left a mark. Beyond the board table, visits to Tokyo's garden centres and green spaces offered a vivid glimpse of where our industry could go, immersive, experiential, deeply connected to nature yet boldly modern. teamLab Planets in particular stayed with me: a place where people come not to buy, but to live an experience. Garden centres have something no screen can replicate, the living, the sensory, the seasonal. Our opportunity has never been greater. I return from Tokyo energised and full of ideas



Looking ahead, we are equally excited for the IGCA 2026 Congress in Germany. After time spent connecting across borders in different ways, there is something truly special about coming together in person again, and we are very much looking forward to welcoming and reconnecting with each of you face to face.

I encourage all members to secure their place as soon as possible, as Congress attendance is limited and expected to fill quickly. We would not want anyone to miss

this opportunity be part of what promises to be another inspiring and memorable gathering of our global community.

Grá agus gairdín!

Fergal Doyle
President, International Garden Centre Association

World Retail Congress 2026: What Berlin Told Us About the Future of Retail **By Fergal Doyle, IGCA President**

Berlin in late April is not traditionally associated with warmth, but the World Retail Congress 2026 generated more than enough heat of its own. Over two days at the InterContinental Hotel, with the Brandenburg Gate as a backdrop on every screen, more than 800 retail leaders from across the globe gathered to confront the industry's most consequential question: what does a world shaped by artificial intelligence mean for the future of retail? I attended as Chairman of Retail Excellence Ireland. Here is what stayed with me, and what I believe it means for our industry.

The Mood in the Room: Urgency Without Panic

The tone from the opening address was one of clear-eyed urgency. David Schneider, co-founder of Zalando, spoke without ambiguity about the speed of change and backed it with a statistic that stopped the room.

"One year ago it was close to zero. Today, 90% of Zalando's product marketing content is AI-generated."

Schneider was careful not to reduce this to a technology story. His deeper point was about the consumer: "Customers don't want generic. They want something that is personally relevant, they want authentic." The lines between inspiration, social media and commerce are blurring. AI makes hyper-personalisation possible at scale, but the destination is still an emotional connection with the customer.

The AI Revolution: Embrace It or Be Left Behind

If there was a single consensus at WRC 2026, it was this: doing nothing is not an option. Alex Baldock, outgoing CEO of Currys, called AI "the biggest technology change since steam power", one that will be "enormously disruptive, and quickly."

The agentic AI panel, sponsored by Mirakl and featuring leaders from Best Buy, Kingfisher and Mirakl, was where theory met operational reality. Agentic AI acts on behalf of the consumer, autonomously completing research, comparison and purchase. The implication for every retailer in the room was blunt: within two years, a significant proportion of your customers will delegate their shopping to an AI agent. The question is whether your business is visible, credible and findable in that environment.

"The question is no longer whether retail uses AI. The question is whether your enterprise can learn as fast as your customer, your competitor, and your supply network."

Romain Roulleau of Kingfisher gave the most practical advice of the two days: get a strategy, adjust it, but take small bets and quick wins. Running beneath all of this was a single urgent question about data: how well-structured is your product catalogue? Can AI agents find it, interpret it and transact on your behalf? The retailers who have invested in clean, structured data are building a competitive moat. Those who have not face a genuine risk of invisibility before they even realise what is happening.

Physical Retail is Alive: Fewer and Better

Not everything in Berlin was about algorithms. John Ryan of Newstores delivered a world tour of the twelve best new stores opened in the past year. His conclusion was welcome: physical retail is resurgent, but the story is quality over quantity. Fewer stores, but better. Shoppers are the winners.

- Immersion over transaction. The best new stores, from Restoration Hardware's extraordinary 3,900 sq m Paris gallery on the Champs-Élysées to Nespresso's Fifth Avenue flagship, have abandoned traditional layouts in favour of experiences that win customers through generosity and atmosphere.
- The push for posh continues. Premium and lifestyle retail is the direction of travel, driven by a consumer who is more discerning and experience-hungry than ever. New York City has had its best store year of the decade.
- Environment as selling vehicle. H&M's concept store in Seoul's Seongsu district uses the exterior of the building as its primary selling tool; most of the stock inside is identical to any other H&M, but the environment carries the day.
- Food and hospitality as anchor. The new Waitrose in Newbury, positioning itself as the home of food lovers, is designed deliberately to slow shoppers down and make them linger.
- Spin-off formats are accelerating. Primark Home in Manchester challenges Zara Home and H&M Home at Primark price points, spun directly from its existing home range.

The lesson for our industry is not that you need a Champs-Élysées address. It is that experience, food and genuine design intent are what differentiate a store worth visiting from one that can be replaced by a website. Many of our members are already ahead of this curve.

In an AI World, Your People Matter More Than Ever

Amid all the AI conversation, the session that resonated most with me personally was about the frontline workforce. Vacancy rates among store managers are running at 30% in some markets, yet the store manager remains the most underestimated asset in retail: the head coach who determines whether everything planned and invested actually lands on the shop floor.

"AI for efficiency. People for trust. In the new retail world, always build in trust."

AI handles scale and speed. Human ingenuity provides the empathy and insight technology cannot replicate. The retailers winning right now are using AI to free their people to do what only humans can: connect, reassure, inspire and serve. Are your store managers leading, or just managing?

The FIRA Mid-Year Meeting: A Global Perspective

On the final afternoon I joined the FIRA Mid-Year Meeting, bringing together senior representatives from retail associations across eleven countries: Austria, Belgium, France, Germany, Italy, Australia, Norway, India, Ireland, the United States and EuroCommerce representing the broader EU.

The headline speaker was Steven Bailey of EY, whose presentation, Retail at the Edge of AI, was among the most structured of the whole week. He framed three shifts every leadership team must address: from automation to advantage, where AI matters most where learning compounds rather than simply trimming cost; from channels to learning loops, connecting signals, decisions, outcomes and model updates; and from AI project to operating system. That third shift landed hardest.

"If AI does not change frontline behavior or executive decisions, it is still a demo." Steven Bailey, EY

The broader mood reflected difficult global trading conditions: inflation, cautious consumers, rising regulation and geopolitical uncertainty. The FIRA Chairman Jacques Creysse captured it

well: "This is only the beginning." What is underway in retail is not a phase to be managed. It is a permanent new reality to be shaped.

What This Means for Retail

- How structured is your data? Can AI agents find and interpret your products, your inventory, your pricing? For most businesses the honest answer is: not well enough yet.
- Are you moving or waiting? The danger is not just being slow to adopt AI, but being confused by the noise and doing nothing. Test, fail, learn, adjust. Take small bets and build quickly.
- Are your people ready? The store manager is your most valuable asset. In an AI-accelerated world the human role is not diminished; it is elevated. But it must be invested in deliberately.
- Is your physical space earning its place? The best new stores are doing something e-commerce cannot: immersion, atmosphere, food, hospitality, experience. If your store could be replaced by a website, it probably will be.
- Do you have board-level alignment? AI strategy requires executive commitment and a clear north star. Projects without strategic alignment will not compound into advantage.

WRC 2026 was the most energised gathering I have attended in years. Our industry has enormous strengths: community connection, personal service, genuine experience and a track record of adapting through difficult conditions. The window for intelligent, proactive positioning is open now. The question is whether we act with the energy and imagination the moment demands. We need to start.

News from Belgium

by Chris Van Wesemael

Garden Centre Awards 2026

2026 marks the Garden Centre Awards, our biennial competition to recognise the best garden and plant centres in Belgium.

We are introducing some changes and a new visual identity.



In line with our mission, there will be an additional assessment criterion focusing on sustainability: how our garden centres inform and guide consumers towards more sustainable gardening.

This year, alongside a professional jury, there will also be a consumer jury (mystery shoppers) who will focus primarily on assessing this aspect. For the first time, the competition is open to all garden and plant centres, including non-members.

In this way, we are creating even greater impact and visibility for our garden retail sector.

Feedback from Canada

by Anne Kadwell

Following the lead of international peers, Garden Centres Canada (GCC) now offers the Retail Professional Leadership award of excellence among both emerging and seasoned employees.



The award provides successful applicants with an up to \$7,000 value through attending premier events like the annual IGCA Congress or GCC Summit, allowing for opportunities to network globally and to participate in the idea exchange of these events. Eligible candidates must be employees of independent garden centres in good standing with GCC.

This grant is a strategic investment in the leaders driving the future of Canadian retail. We are looking forward to having this individual join the Canadian delegation in Germany 2026.



Update from Czech Republic

by Michal Ferencik



Spring 2026

The spring gardening season in the Czech Republic has started on a very positive note this year. From the very beginning, the weather conditions have been highly favourable, with stable temperatures and, importantly, no late frosts.

Thanks to this smooth start to the season, garden centres are seeing a steady increase in customer numbers.

This early momentum has naturally translated into positive sales development across most categories. If these favourable conditions continue, we expect the spring season to develop into a very successful period.

We very much enjoyed the well-prepared administrators' meeting in Tokyo, which will certainly contribute to a successful Congress. We are now looking forward to the summer and the upcoming German Congress. Last year, we had the pleasure of hosting a group of German garden centres in the Czech Republic, which was a very

pleasant visit. This year, we are looking forward to welcoming a group of Italian garden centres to our country.

Michal Ferencík - FloreniUm (Czech garden centre association), Czech Republic

Highlights from Germany

by Thomas Buchenau



Dear colleagues from the international garden centre community,

Preparations for the International Garden Centre Congress (IGCA) 2026 in Munich (16–22 August 2026) are in full swing – and we are pleased to warmly invite you once again to be part of this special event.

With current hotel occupancy at 80%, our room allocation at the congress hotel is becoming limited, so secure your place now and benefit from the current rate until 30 June 2026.

Why you should attend:

- High-level networking: Meet so many industry experts from around the world and exchange views on current trends, challenges and innovations.
- Inspiration and knowledge transfer: Experience a diverse programme featuring expert presentations, best-practice insights and exclusive perspectives on the German garden centre sector.
- Cultural highlights: From a traditional “Oktoberfest in the garden centre” to inspiring excursions – IGCA 2026 combines business with authentic Bavarian hospitality.



Take the opportunity to be part of this international movement. Registration is quick and easy at: www.igca2026.com/Registration

IGCA Pre-Tour: Exclusive insights ahead of the congress
Final Call – Now or Never!



Spots for our exclusive Pre-Congress Tour from August 13–15, 2026 are almost gone!

Before the official congress even begins, this is your last chance to join a truly special experience: an inspiring journey through some of Germany's most beautiful regions – from Frankfurt am Main via Rüdesheim am Rhein and Heidelberg all the way to the charming town of Rothenburg ob der Tauber.

Look forward to a unique blend of professional insights and cultural highlights:

- Exclusive visits to selected garden centers
- A personal meeting with the “World Confectioner of the Year 2024” at the Löwer Garden Center
- Insights into the renowned Geisenheim University, a leader in horticulture and viticulture
- Memorable impressions along one of Germany's most scenic routes

This tour is more than just a warm-up – it's an experience that inspires, connects, and stays with you.

If you want to be part of it, now is the moment: the final spots are about to be taken. [Don't wait – secure your place today!](#)

Current Market Development: German Garden Centres in March 2026

The German garden centre market showed a mixed performance in the first quarter of 2026. After a weak start to the year in January (–2.52% revenue), February saw a slight recovery (+2.28%). In March, revenue was just above the previous year's level (+0.18%), while customer frequency declined slightly. The month was shaped by an early start to the season and weather-related weakening towards the end of March.

Looking at product categories, March brought positive momentum in bedding and balcony plants, perennials and floristry, while several classic spring assortments remained below last year's levels. With Easter falling two weeks earlier, key seasonal sales shifted into March. Garden centres with gastronomy offerings also recorded significant increases.

Germany's consumer barometer for April indicates a higher propensity to save, but also a positive inclination to make purchases – factors that may influence the further course of the season.

Greetings from Ireland

By Fergal Doyle

As we move into what promises to be a pivotal year for Irish retail, our garden centre sector is stepping into 2026 with cautious but genuine confidence.

Economic Headwinds, The Iranian Crisis & Energy Costs

Ireland's economy is not displaying any real structural impact from the Iranian crisis at this point, but the inflation picture has shifted notably.



The consumer price index jumped to 3.6% in March, up from 2.7% the previous month, with energy costs as the primary driver. This has exacerbated a cost of living squeeze that was already evident before the situation in Iran developed. The real impact will depend on the depth and duration of the energy crisis, and that is true for every country, not just Ireland. For consumer-facing businesses, it is a challenging environment

and will remain so until energy prices decline in a sustained and meaningful way. Garden centres, sitting as we do at the intersection of discretionary spend and essential home investment, will need to continue making the case for the value, practical, emotional, and wellbeing, that gardening delivers.

Government Response: The Irish Government has introduced an energy relief package of €755 million to help households and businesses manage rising energy costs. While this is a meaningful intervention, sustained relief will ultimately depend on a return to stability in global energy markets.

REI Advocacy, Keeping the Pressure On

Retail Excellence Ireland continues to champion the industry at the highest levels of government, and the cost of doing business remains our most pressing policy challenge. Following the landmark Jim Power report published in 2025, which benchmarked Ireland's retail cost base against our EU peers, REI has maintained its call on Government to:

- Pause further minimum wage increases (up 38% since 2020, the 2nd highest in the EU-27)
- Address energy costs, Ireland holds the highest electricity prices in the EU for non-household users
- Extend meaningful cost-support schemes such as the Increased Cost of Business (ICOB) grant
- Reform the insurance landscape, which continues to weigh heavily on independent retailers

With 200 retail insolvencies recorded in 2024, the highest of any sector, the pressure on smaller independent operators is real. REI's advocacy work is not just important; it is essential.

The Trading Environment, Spring and Summer Outlook

As we head into our most important trading season, we remain positive and the sun is shining. Spring and Summer are when our centres come alive, and there is every reason to believe that customers will follow. The home and garden category continues to be one of the most resilient corners of retail and consumer investment in outdoor living remains a priority for Irish households.

However, we cannot ignore the data. Consumer confidence has declined by 18% due to global uncertainty, and that is a reality we need to plan around. Shoppers are still coming through the door, but they are thinking harder about where they spend.

Looking Ahead, Munich 2026

We are looking forward to the IGCA Congress in Munich (16–22 August 2026). Germany's garden centre industry is among the most sophisticated in Europe, and the Bavarian setting promises to be truly special. Register early at www.igca2026.com, as always, there will be a proud Irish contingent on the tour bus.

Until then, spring is upon us. There are seeds to sow, customers to delight, and a season to make the most of.

Warm regards,
Fergal Doyle
Arboretum

Feedback from Italy

by Giacomo Brusa

AICG YOUNG GENERATION

The future of Italian garden centers now has a clear name.

It is called AICG Giovani.YOUNG

With the official launch of this new group within the Associazione Italiana Centri Giardinaggio, the green sector takes a concrete step toward renewal.



This is not just an internal association update.
It is a strong signal.

A group of young professionals has come together.
They share the same passion for greenery, but with a completely new perspective.

A different kind of energy.
More dynamic.
More contemporary.

The message is clear from the start.
The sector needs to evolve.

Garden centers can no longer be just retail spaces.
They must become places of experience.

Spaces where customers come to find inspiration.
To learn.
To live the green lifestyle.

This is exactly where AICG Giovani comes into play.

The goal is not to preserve.
It is to transform.

To bring new skills into the sector.
New languages.
New models.

The protagonists are young entrepreneurs and professionals.
Some grew up in the garden center world, others come from different backgrounds.

But all are united by a shared vision.
To build the future, not replicate the past.

The launch of AICG Giovani comes at a crucial moment.
The green market is changing rapidly.

Customers have changed.
They are more informed.
More demanding.

They are not just looking for products.
They are looking for experiences.

They want to be engaged.

They want to feel part of something.

Meeting these expectations requires new skills.
Digital, communication, and design expertise.

It requires a new vision of the garden center.
More immersive.
More emotional.

It also requires the courage to change.

This is where the real value of this project lies.

AICG Giovani represents a bridge.
Between those who have built the sector until today
and those who will lead it into the future.

It is not a break.
It is a natural evolution.

A necessary generational transition.
Often postponed.
Often underestimated.

But no longer avoidable.

The group is born with enthusiasm.
But also with responsibility.

Because the sector does not just need ideas.
It needs action.

Concrete projects.
Measurable results.

The real challenge is to turn this initial energy
into a force capable of making a real impact.

If this happens, AICG Giovani can become
a benchmark for the entire industry.

Not only for young professionals.
But for anyone who wants to grow.

The journey has just begun.

But the signal is strong.

Change is underway.

And this time, it starts with people.

Update from The Netherlands

by Frank van der Heide



At garden centers in the Netherlands, spring got off to a late start. It was too cold for too long, which caused turnover to lag behind last year. Although we started the year well, a moderate March and a cold start to the first weeks of April through week 16 resulted in turnover development compared to last year of 0-2%. A major issue in the sector, for both retailers and suppliers, remains rising costs.

Labor costs have increased significantly in recent years, as have rising energy expenses. This puts pressure on the operating model. The high fuel costs as a result of the war in the Middle East are causing considerable concern today. How do we pass these costs through the chain? After all, all goods must still go from the producer to the importers and then to the garden centers. This cannot all be absorbed within the chain, so at some point we will have to pass it on to the consumer. How are we going to do that, and is the consumer willing to pay it? That is quite exciting. Because how will that develop towards the autumn? And what effects will that have for, for example, Christmas? On the other hand, we have learned from the past that our industry, even in uncertain times, is an occasion for consumers to make their homes nice and cozy.

In addition, we are working together with a group of about 60 garden centers and suppliers on Garden Retail 2030. What will our industry look like then, and what do we need to do today to ensure that we are attractive, relevant, and sustainable, and have a future-proof retail model? It is very interesting to look to the future together within the industry and with speakers and research from outside the industry, and to learn. The results of this year are that we are testing robots in garden centers, that 100 students from the University of Amsterdam are conducting research at garden centers, and that we are setting up a benchmark for key figures at garden centers. All in all, an interesting spring with many opportunities.

All in all, a remarkable spring with concerns here and there but certainly also with many opportunities.

Because we have a wonderful industry with a unique proposition.

All the best from the Netherlands
Frank

News from Spain

by Santiago Gonzales



The association held its annual congress (Expogarden26) for almost three days in the Spanish capital (Madrid), achieving its best results in the last six years.

Centralizing the event allowed us to attract over 100 garden center owners and 60 exhibiting companies. The congress featured several engaging conferences that were very well received by attendees, as well as various activities. The most noteworthy was the "First Dates" event, where over 200 people met each other and moved around every ten minutes—a highly recommended experience.



Feedback from South Africa *by Gerdie Olivier*

One of the key challenges currently facing the industry is the current economic environment in South Africa. Rising cost of living pressures are directly impacting consumer spending behaviour, resulting in fewer visits to garden centres and noticeably smaller basket sizes when consumers do shop



For retailers, this combination of reduced footfall and lower average spend is placing continued pressure on turnover and overall profitability.

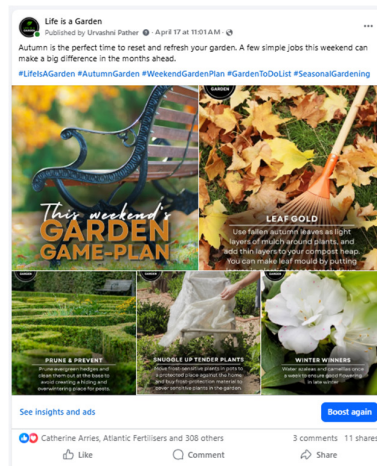
In addition to these economic pressures, the industry has also had to contend with highly variable weather conditions over the past few months.

The 2026 garden centre retail season has been shaped by a highly variable weather pattern from January through April, with noticeable shifts in how and when customers engage with retail spaces.

Rather than a single dominant weather trend, the season was characterised by frequent short-term changes. This encouraged more “weather-responsive” shopping behaviour, where customers tended to visit garden centres during favourable breaks rather than following traditional seasonal patterns.

At the same time, these conditions also influenced plant production.

Against this backdrop of challenges, we have continued to focus on marketing gardening to consumers through *Life is a Garden*—with the aim of reaching non-gardeners while also reinforcing and growing the love of gardening among existing gardeners. By creating awareness, providing practical information and guidance on the basics of gardening and inspiring consumers to beautify their personal spaces, we maintain an ongoing drive to stimulate interest and demand.



Social media content, how-to & inspirational videos and articles across print and digital platforms all form part of this effort to reach consumers where they are. Ultimately, the objective is to encourage greater engagement with gardening, thereby supporting increased footfall in our retail members' stores and strengthening the wider supply chain.

Click here to view one of our produced videos for May:

https://www.youtube.com/shorts/hk-btBryY_w

Greetings from South Africa!

Feedback from UK

by Peter Burks

We are not enjoying such a good spring as we had last year but it is certainly not a disaster.

March has resulted in our members being down by 4% compared to March 2025, but as that was 26% up on 2024. I don't think this is too bad, however April has not been much better. It is the gardening categories that are struggling.



Our inspectors are now out doing the unannounced visits to all members. Early feedback say standards are definitely improving on last year, with plants particularly good.

We have also held the first meetings of our Rising Stars program and new for this year the Hospitality Rising Stars. The emphasis with both is to take the groups to places they would never get to see, and meet people they wouldn't usually get to speak to and add in a training element to each meeting. The Rising Stars had a session with a marketing expert, the Hospitality Rising Stars went to a coffee company and learnt all about coffee and then made their own concoctions using different syrups. There was great positivity amongst both groups.

Following the presentation from Netherlands in Tokyo we have begun discussions on approaching the pesticides in plants issue.

News from USA
by Kellee O'Reilly



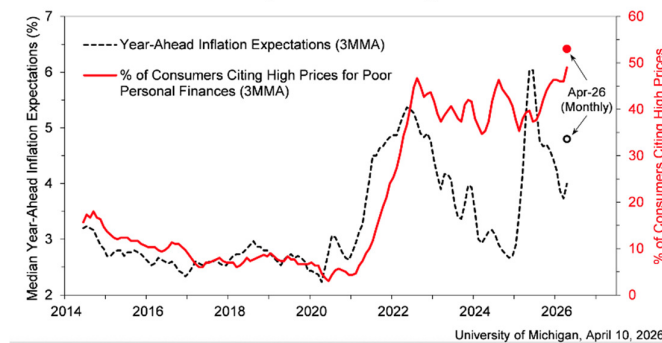
Greetings from the USA! Despite lousy consumer "sentiment" numbers in the US (due to many factors, but notably "perception of high prices" due to tariffs and now Iran war effects - see chart attached!), Spring for independent garden retailers in our community seems to be off to a strong start.

Nearly ALL the 6 raw numbers we track in our project (Sales, Customer Count, Gross Margin and Unit Count) are showing median increases -- up somewhere between 3.5 and 9% over the 2025 year through March. (Unfortunately, Labor Dollars and Labor hours are ALSO up... reflecting reality that wages continue to rise to keep up with the increasing cost of living.)

Anecdotal commentary says that "it feels like early COVID" as consumers reduce their travel and seek solace in the garden. We are seeing fuel charges begin to be more common as vendors begin to realize that fuel / trucking expenses are increasing exponentially.

While the Southern tier of the country has been going strong for more than a month already (some up in the 20-30% area!!), in the Northern markets, things are just waking up -- the next 8 weeks will tell us a lot about the "season that makes or breaks most people's year" ... but retailers are an optimistic bunch!

High Price Concerns for Personal Finances and Short-Run Inflation Expectations Surge Amid Iran Conflict



**Upcoming IGCA Congress
2026: Munich, Germany**



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