



Grower Summary

CP 100

Tracking Peat usage in Growing
Media Production

Annual 2013

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HDC
Stoneleigh Park
Kenilworth
Warwickshire
CV8 2TL

Tel – 0247 669 2051

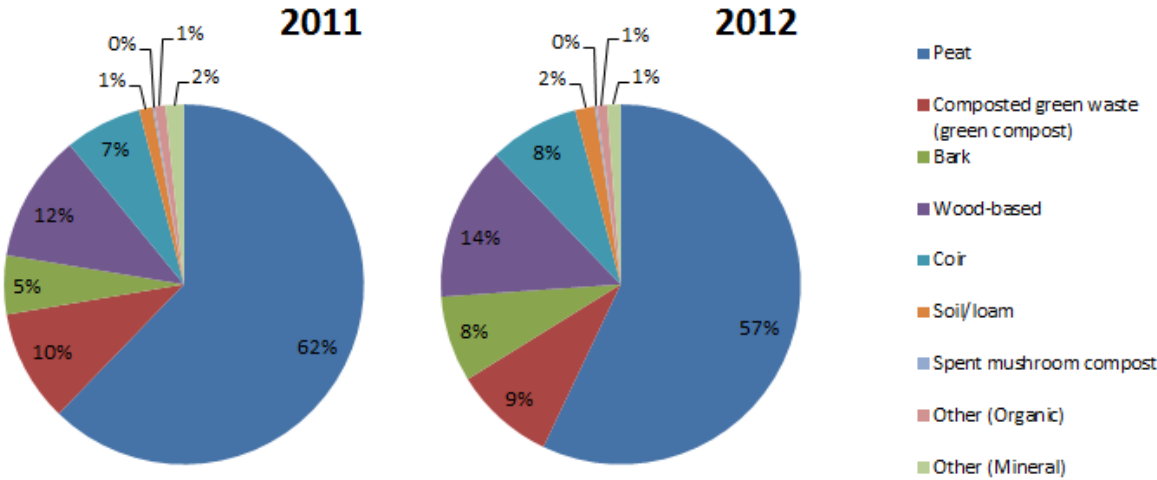
HDC is a division of the Agriculture and Horticulture Development Board.

Project Number:	CP 100
Project Title:	Tracking Peat usage in Growing Media Production
Project Leader:	David Denny
Contractor:	HTA
Report:	Annual Report, July 2013
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Headline

Between 2011 and 2012 the volume of growing media sold by manufacturers in the UK (including export sales) fell by 12%. Volumes for professional use fell by 7% and those for amateur use fell by 14%.

Across all sectors of the growing media market the proportion of volume accounted for by peat and green compost (CGW) fell, whilst the proportion of ingredients such as bark, coir and wood based ingredients increased.



Background

The overall aim of this project is to provide objective information of benefit to multiple stakeholders on the use of peat in UK horticulture. The research aims to measure the volume (cubic metres) of growing media (and associated volume of peat) sold by producers in the UK and for export from the UK. The project also aims to provide information on relevant trends from 2011 to 2014.

The project will provide data to the industry and other stakeholders on changes in the use of bulky components of growing media including peat over time. It will inform the Growing Media Panel on progress towards targets of eliminating all peat use in retail horticulture by 2020 and professional horticulture by 2030.

The data collection is based on information submitted by growing media manufacturers which account for the majority of UK growing media supply, whether for amateur or

professional use or export. Data¹ on 2011 was collected from manufacturers between October and November 2012, and data on 2012 was collected in February and March of 2013. This report is based on these two initial waves of data collection in the project.

Previous work has been conducted by Defra to monitor the composition of growing media. The latest data available from this project relate to 2009. Differences in the sampling and methodology of these two studies mean that data are not directly comparable. However as part of the data checking for information gathered in this project the figures on the peat content of growing media have been cross referenced against data in the Defra project to ‘sanity check’ that the figures are broadly in line with what might be expected.

Summary

Overall sales trends 2011 to 2012

UK growing media supply for domestic use or export fell by 12% in volume overall in 2012 compared with 2011. In volume terms this equates to a fall from 4.47 m cubic metres to 3.95 m cubic metres. In terms of growing media supplied for retail (amateur use), volumes fell by 14% from 3.14 m cubic metres to 2.69 m cubic metres. For professional use the equivalent figures are a 7% fall, with volumes falling from 1.3 m cubic metres in 2011 to 1.2 m cubic metres in 2012. Production for export accounts for a very small proportion of overall supply (1.4% in 2012), although, a 63% increase in volumes for export was recorded in 2012 compared with 2011.

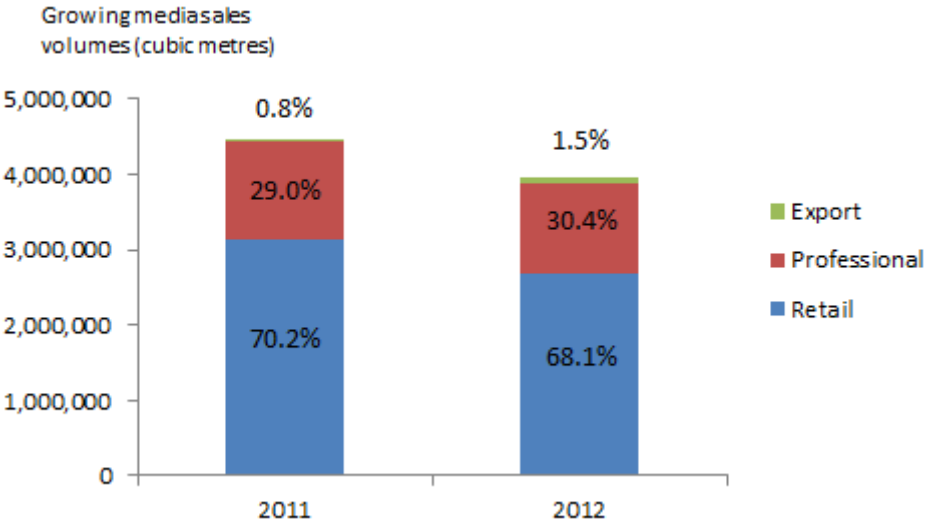


Figure 1: Proportion of volume in growing media production which goes to retail, professional and export markets 2011 and 2012

¹ See appendix for a copy of the form used for data collection.

Overview of growing media supply for the retail market

As noted, supply volumes for the UK retail market were down by 14% in 2012 compared with 2011. Within this, the 'mix' of ingredients used for all types of growing media product changed. Overall peat and green compost² accounted for a lower proportion of the volume produced in 2012 than in 2011. The proportion of volume accounted for by bark, coir, and wood-based ingredients increased in 2012 compared with 2011.

The following charts show the change in volume (in cubic metres) of the different ingredients used in growing media for the retail market and the change in the proportion of total growing media supply accounted for by different ingredients.

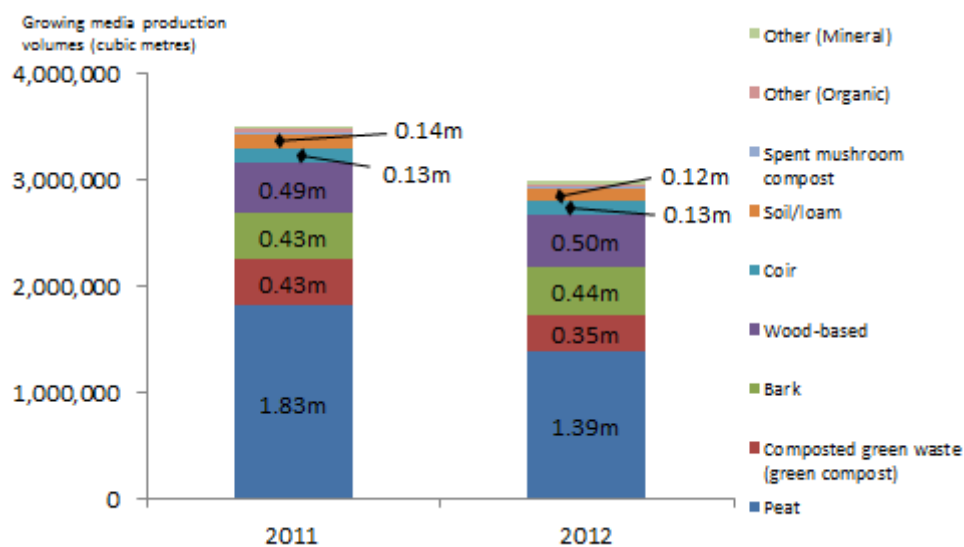


Figure 2: Volume in cubic metres of ingredients used in growing media supply for the retail market 2011 and 2012

² The term 'green compost' is used throughout this report to denote composted green waste.

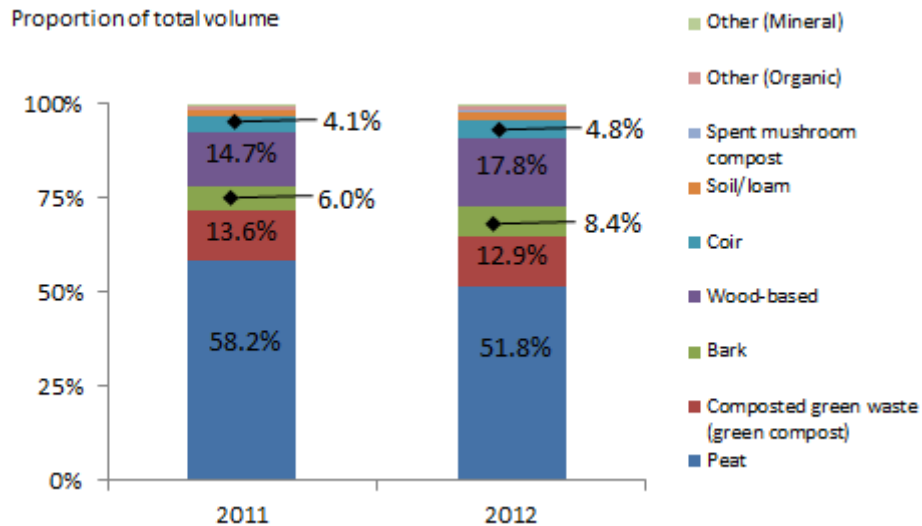


Figure 3: Proportion of ingredients used in total growing media supply for the retail market 2011 and 2012

In both absolute and proportion terms, peat use in growing media manufactured in the UK for the UK retail sector fell, as did green compost. Wood-based, bark and coir ingredients have increased in terms of the proportion of the mix they account for.

In terms of the different growing media products supplied for the UK retail market, there were some notable shifts. Within growing media containing peat, multi-purpose growing media increased its share of overall volumes supplied for UK retail. Peat-free growing media also increased its share of overall growing media sales volume. The proportion of volume accounted for retail peat also increased (albeit retail peat accounts for a very small proportion of overall volumes). Within growing media containing peat, specific composts (e.g. sowing, potting, ericaceous, etc) as well as John Innes accounted for a lower proportion of overall volumes in 2012 than they did in 2011.

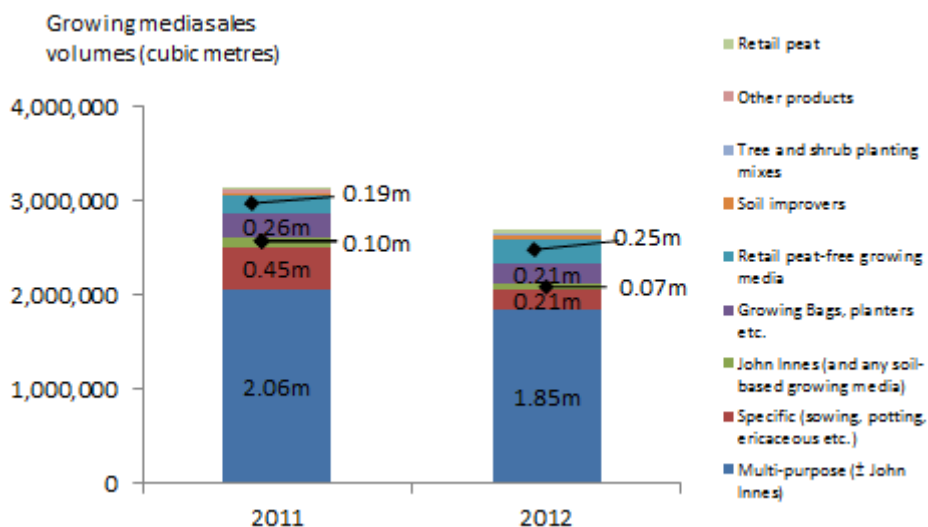


Figure 4: Volume of different growing media products supplied for the retail market 2011 and 2012

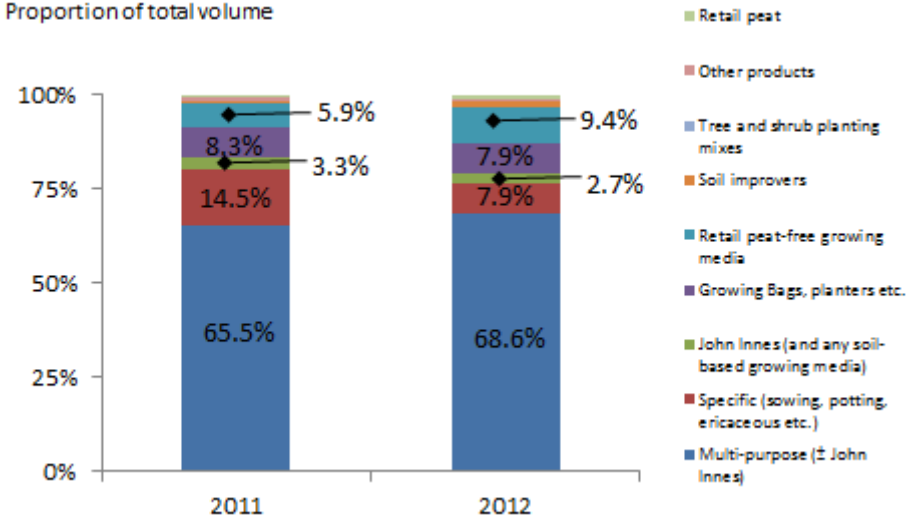


Figure 5: Proportion of overall volume of supply for the retail market accounted for by different types of growing media product 2011 and 2012

Between 2011 and 2012 there was a movement away from peat in growing media for amateur use. This shows itself both in the proportion of volume supplied that was made up of peat, and the proportion of production accounted for by peat-free growing media. Conversely the volume of product composed entirely of peat (e.g. peat bales) for retail increased, however, as of 2012 such peat products accounted for 0.9% by volume of growing media products supplied for retail.

Overview of growing media supply for the professional market

Supply volumes of growing media for professional use fell in 2012 by 7% compared with 2011 (1.2 m cubic metres compared with 1.3 m cubic metres). As in the retail market, the proportion of growing media volume made up of peat and green compost fell, whilst the proportion made up of bark, wood-based and coir increased.

The following charts show the change in volume (in cubic metres) of the different ingredients used in growing media for the professional market and the change in the proportion of total growing media supply accounted for by different ingredients.

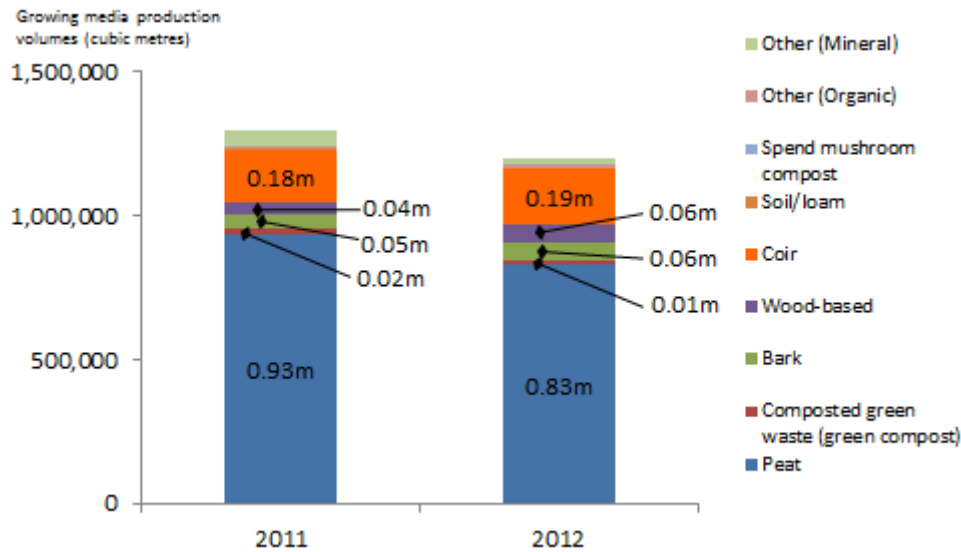


Figure 6: Volume in cubic metres of ingredients used in growing media supply for the professional use market 2011 and 2012

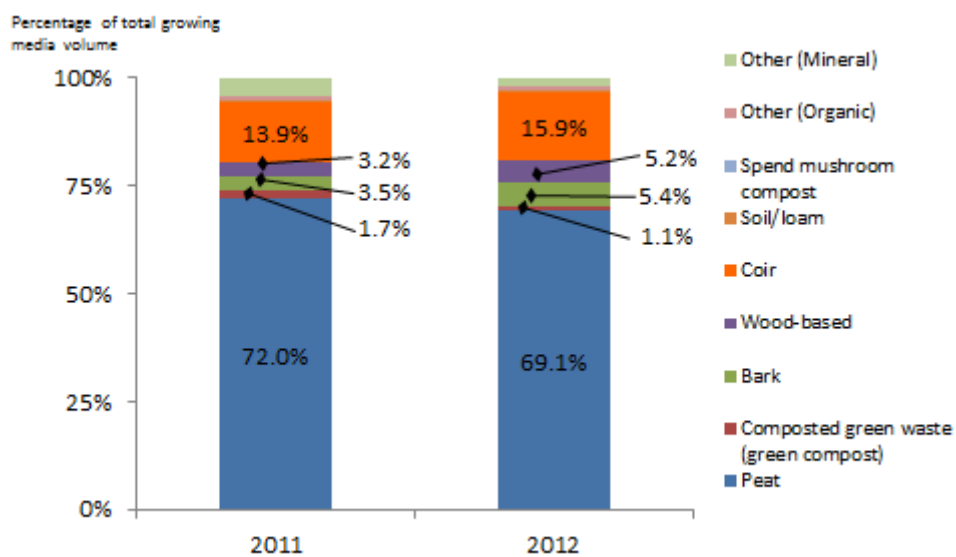


Figure 7: Proportion of ingredients used in total growing media supply for the professional use market 2011 and 2012

As in the retail sector, peat use has fallen, and the use of wood-based, coir and bark ingredients has increased. Coir now accounts for a much greater proportion of volume of overall supply for professional use than in the retail sector (15.9% compared with 4.3%). Indeed growing media for professional use (compared with growing media for retail use) relies much more on peat and coir. In growing media supplied for professional use 85% of volume is made up of peat and coir. The corresponding figure for growing media for the retail market is 57%.

In terms of the type of products supplied for the professional grower market, there are only slight movements in the proportion of volumes accounted for by different types of growing media product between 2011 and 2012. However two points worth bringing out are that the proportion of overall volume accounted for by peat products (e.g. mushroom peat and casing and peat bales) has increased whilst the proportion of overall volume accounted for by professional peat free growing media has fallen.

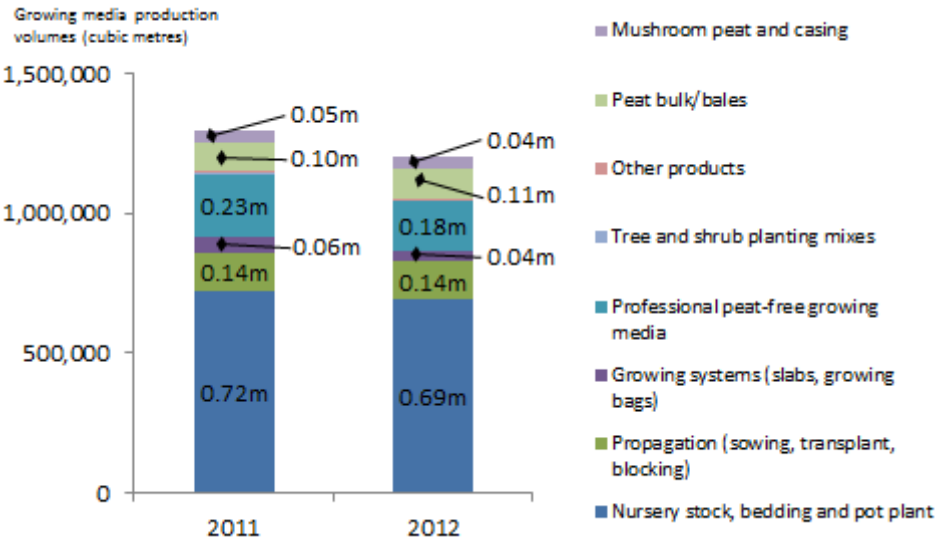


Figure 8: Volume of different growing media products supplied for the professional use market 2011 and 2012

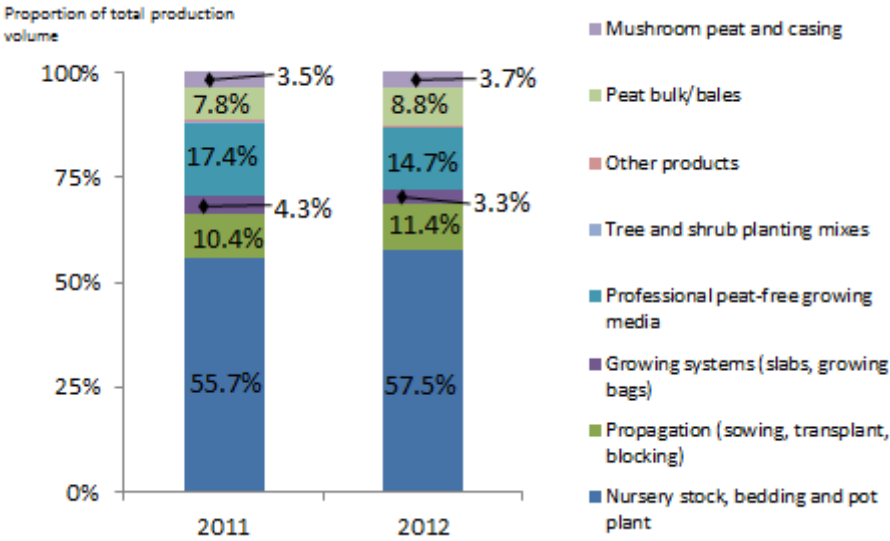


Figure 9: Proportion of overall volume of supply for the professional use market accounted for by different types of growing media product 2011 and 2012

The data collection form that manufacturers completed asked them to provide separate volume figures for growing media for bedding and pot plant, and nursery stock. Respondents did this based on the specific mixes supplied, which tend to have very different ingredients in terms of controlled release fertilisers and other components designed for these specific crops. From a manufacturer's point of view they are easily distinguishable. A similar split was reported in the Defra statistics³, but based on a different methodology. In summary, the approach used was to take Defra crop production statistics (e.g. the numbers of plants of different types produced), and estimate volumes of growing media that would be required to produce these volumes.

The two methodologies produce different, in fact almost opposite results from each other for the sectors in question. The Defra statistics consistently report a greater volume of growing media used in nursery stock production, and the data collection for this study show a greater volume used in bedding and pot plant production. Given the inconsistency between the two sets of figures, further investigation is taking place to understand why the two figures are at odds, and to identify any risks and assumptions in either data set that should be considered when using them. For this reason an aggregate figure only is published in this first report. However the split is available on request on a provisional basis, and we expect to be able to publish the figures on a formal basis along with a detailed discussion of the pros and cons of each method in the 2014 edition of this report.

In terms of peat use in the sector, although the proportion of professional growing media products accounted for by peat has fallen from 72% to 69.1%, peat-free growing media accounts for a lower proportion of production types in 2012 than in 2011. Peat products such as peat bales and mushroom peat account for a greater proportion of product types in 2012 than in 2011.

Overview of peat sources for growing media (amateur, professional and export use)

The following chart shows that the volume of peat from different countries which was included in 2012 growing media sales fell in comparison to 2011. This is in line with overall falling sales volumes of growing media. The exception to this was peat sourced from Northern Ireland, which 'bucked the trend'.

³ Defra report SP08019 - Availability and supply of alternative materials for use in growing media to meet the UKBAP target on reduced peat use in horticulture

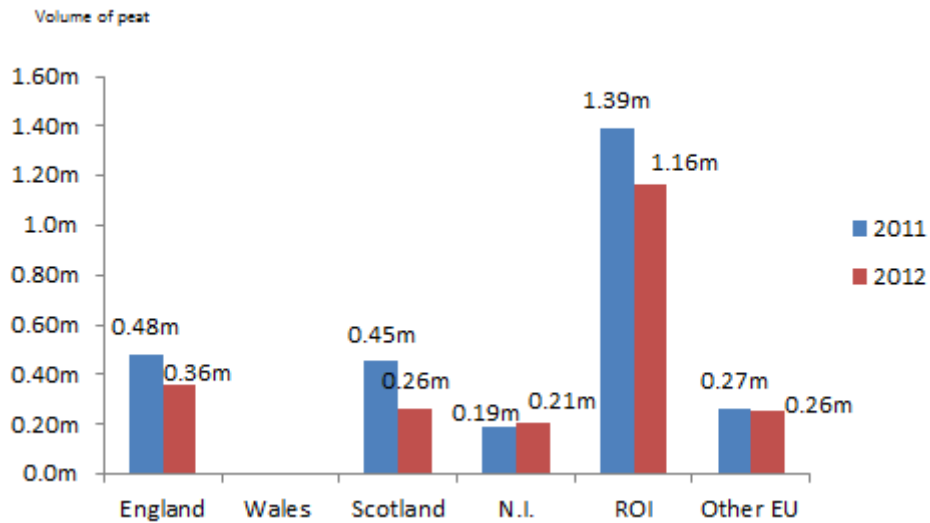


Figure 10: Volume of peat sourced from different countries for UK in growing media sold 2011 and 2012

Financial Benefits

The scope of this data gathering project does not include the provision of recommendations relating to cost reduction or financial return on investment. Such recommendations and analyses are being prepared in other work streams of the Growing Media Panel.

Action Points

Growers can use the information prepared in this report to monitor the overall use of peat and non-peat based growing media within the industry and benchmark their own business use of growing media against it.