

IFPA's U.S. Floral Retail Point of Sales Results

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Four weeks ending 2/23/2025



Valentine's Day Drove Dollar Gains, but Units Fell Short Off Year-Ago Levels

Roses, arrangements and bouquets had a strong month and generated year-over-year gains in both dollar and unit sales. However, with tremendous pressure on income, consumers did not buy as many units overall as they did in 2024.

PERFORMANCE



Retail floral sales in the latest four and 52 weeks

Sales for the four weeks ending the February 23rd came in just under \$1.3 billion. This is highly elevated from the January report as Valentine's Day represents one of the biggest occasions in floral sales. Year-over-year, dollars grew a little over 1%, but units were not able to hold the line, at -3.1%.

Amid continued economic pressure, consumers also cut back on confectionery and other Valentine's Day-related purchases.

The full-year view reflects sales of \$9.55 billion. This is up 3.2% year-on-year. However, the February decrease in unit sales pulled down the full-year unit performance to just 0.1% above year ago levels.

Floral department	Dollar sales	Dollar % change vs. year ago	Unit sales	Unit % change vs. year ago
4 weeks	\$1.26B	+1.3%	91.77M	-3.1%
52 weeks	\$9.55B	+3.2%	909.4M	+0.1%

Source: Circana, Integrated Fresh, MULO, 4 and 52 weeks ending 2/23/2025

SALES
BY TYPE

Valentine's Day fuels gains for roses, arrangements and bouquets

The top three sellers, roses, arrangements and bouquets, represented more than 71% of sales in February. Additionally, they each grew dollar and unit sales year-on-year. Bouquets had the highest growth rate, at 7.2% for dollars and 8.1% for units.

Smaller sellers experienced declines, including potted plants, consumer bunch and bulbs.

4 w.e 2/23/2025	Dollar sales	Dollar % change vs. year ago	Unit sales	Unit % change vs. year ago
Floral department	\$1.26B	+1.3%	91.8M	-3.1%
Roses	\$408.3M	+3.8%	24.2M	+0.6%
Arrangements	\$256.3M	+2.1%	7.2M	+1.5%
Bouquets	\$237.3M	+7.2%	15.8M	+8.1%
Potted plants	\$142.5M	-6.3%	12.0M	-9.1%
Consumer bunch	\$111.9M	-1.1%	16.0M	-2.6%
Bulbs	\$20.7M	-12.5%	2.3M	-12.8%
Outdoor plants	\$14.7M	-22.8%	1.7M	-25.4%
Holiday floral	\$1.4M	+49.1%	0.2M	+58.8%

Source: Circana, Integrated Fresh, MULO, 4 weeks ending 2/23/2025

PRICING



Inflation Across Floral Segments.

The price per unit in the four-week period increased 4.6% compared to last year. This helped boost dollar sales, but may be one of the reasons why unit sales backslid a bit.

Arrangements had the lowest inflation of the bigger sellers.

4 w.e. 2/23/2025	Price per unit	% Change vs. year ago
Floral department	\$13.75	+4.6%
Roses	\$16.88	+3.2%
Arrangements	\$35.61	+0.6%
Bouquets	\$15.05	-0.8%
Potted plants	\$11.87	+3.2%
Consumer bunch	\$6.98	+1.5%
Bulbs	\$8.97	+0.3%
Outdoor plants	\$8.53	+3.5%
Holiday floral	\$6.85	-6.1%

Source: Circana, Integrated Fresh, MULO, 4 weeks ending 2/23/2025

REGIONAL REVIEW



Far-Ranging Performances by Region

The Great Lakes and the Plains regions were the only ones to experience dollar declines in the four-week period. The South Central and Southeast had strong growth, upwards of 5%.

In the 52-week view, the South Central and Southeast were also the strongest growth areas, along with the West.

4 w.e. 2/23/2025	Share of floral \$	Floral \$ sales growth vs. year ago
Total US	100.0%	+1.2%
California	13.8%	+0.2%
Great Lakes	11.1%	-0.7%
Mid-South	11.7%	+1.7%
Northeast	12.0%	+1.6%
Plains	5.3%	-2.4%
South Central	17.2%	+5.8%
Southeast	15.0%	+5.7%
West	14.1%	-4.4%

Source: Circana, Integrated Fresh, MULO, 4 weeks ending 2/23/2025

52 w.e. 2/23/2025	Share of floral \$	Floral \$ sales growth vs. year ago
Total US	100.0%	+3.2%
California	13.4%	+2.6%
Great Lakes	12.7%	+1.3%
Mid-South	11.1%	+2.9%
Northeast	13.5%	+1.4%
Plains	6.0%	+3.2%
South Central	14.5%	+4.9%
Southeast	13.1%	+5.5%
West	15.8%	+3.7%

Source: Circana, Integrated Fresh, MULO, 52 weeks ending 2/23/2025