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

By: Anne-Marie Roerink | President, 210 Analytics

Four weeks ending 12/28/2023

Floral Managed What Few Others Did in 2023: Growing Dollar and Unit Sales

While floral sales were off to a slower start, the second half of 2023 brought impressive results for the floral department. Importantly, sales were strong during everyday and holiday periods as consumer engagement remained elevated.

IMPRESSIVE GROWTH

The year ends on a high note

According to the latest Circana (formerly IRI) results, the floral department continued to be an above-average performer in the four and 52 weeks ending December 31st in comparison to the same set of weeks last year.

The four weeks showed a 5.5% increase in dollar sales over year-ago levels. Unit sales were up by 5.5% — making it one of the few departments with a positive growth performance. The same was through when looking at all of 2023. Floral dollar sales increased by 5.0% and units pulled ever so slightly ahead of 2022.

Floral department	Dollar sales	Dollar % change vs. year ago	Unit sales	Unit % change vs. year ago
4 weeks ending 12/31/2023	$490M	+7.9%	44.6M	+5.5%
52 weeks ending 12/31/2023	$8.0B	+5.0%	827M	+0.1%

Source: Circana, Integrated Fresh, MULO, 4 weeks ending 12/31/2023

Annual floral department sales in Circana's multi-outlet channels totaled $7.980 billion. These outlets sold 827 million units in 2023.

SALES BY TYPE DECEMBER

Strong sales performances by the powerhouses solidify dollar and unit gains in December

At the category level, performances were mixed with strong growth for bouquets, roses and arrangements. While potted plants were the top sales driver in December, unit sales were slightly down year-over-year. In contrast, roses, bouquets and arrangements had double-digit unit increases when comparing sales to December 2022..

4 w.e 12/31/2023	Dollar sales	Dollar % change vs. year ago	Unit sales	Unit % change vs. year ago
Floral department	$490M	+7.9%	44.6M	+5.5%
Potted plant	$116M	+1.5%	12.5M	-0.4%
Rose	$96M	+14.3%	7.5M	+14.6%
Bouquet	$95M	+13.0%	7.4M	+10.8%
Arrangement	$77M	+16.7%	2.6M	+13.3%
Consumer bunch	$59M	+8.6%	9.3M	+7.6%
Holiday	$14M	-13.1%	913K	-14.3%
Outdoor plant	$5.6M	-12.2%	708K	-3.2%
Bulb	$3.6M	-18.6%	677K	-19.5%

Source: Circana, Integrated Fresh, MULO, 4 weeks ending 12/31/2023

INTERNATIONAL FRESH PRODUCE ASSOCIATION

SALES BY TYPE 2023

Roses, bouquets and arrangements drove the gains in 2023

At the category level, the 2023 performances ranged widely on both the dollar and unit side. Bouquets, the number two seller, had the highest dollar gains in 2023, at 10.9%. Roses, the top seller, had the second-highest gains, at 7.5%. Together these two powerhouses offset the declines in potted and outdoor plants, consumer bunch items, bulbs and holiday.

52 w.e 12/31/2023	Dollar sales	Dollar % change vs. year ago	Unit sales	Unit % change vs. year ago
FLORAL department	$8.0B	+5.0%	827M	+0.1%
Rose	$1.6B	+10.1%	121M	+7.5%
Bouquet	$1.4B	+11.9%	108M	+10.9%
Potted plant	$1,3B	-1.9%	130M	-3.9%
Arrangement	$1.1B	+11.0%	36M	+5.9%
Outdoor plant	$1.0B	+0.7%	150M	-6.3%
Consumer bunch	$958M	+1.9%	150M	-2.5%
Bulb	$90M	-15.2%	17M	-9.1%
Holiday	$46M	-7.2%	3M	-11.3%

Source: Circana, Integrated Fresh, MULO, 4 weeks ending 12/31/2023

PRICING

Continued deceleration of inflation.

After a few months of prices being unchanged versus their year-ago levels, December did see some mild inflation. The average price per unit was $10.99 during the four December weeks, which was up 2.3% versus year ago. This was driven by potted plants, bouquets and arrangements. The average price per unit for roses was virtually unchanged.

4 w.e. 12/31/2023	Price per unit	% Change vs. year ago
Floral department	$10.99	+2.3%
Potted plant	$9.26	+1.9%
Rose	$12.76	-0.2%
Bouquet	$12.94	+2.0%
Arrangement	$29.70	+3.1%
Consumer bunch	$6.32	+0.9%
Holiday	$15.59	+1.4%
Outdoor plant	$7.85	-9.4%
Bulb	$5.38	+1.1%

Source: Circana, Integrated Fresh, MULO, 4 weeks ending 12/31/2023

REGIONAL REVIEW

South Central had a very strong month

All regions contributed to the dollar sales growth in December, but the South Central region had, by far, the strongest growth.

The same was true for the full 2023 calendar year. The South Central region was the second-largest selling area and had double-digit growth.

4 w.e. 12/31/2023	Share of floral $	Floral $ sales growth vs. year ago
Total US	**100.0%**	**+7.9%**
California	14.5%	+1.6%
Great Lakes	11.3%	+10.9%
Mid-South	10.8%	+7.7%
Northeast	14.2%	+7.8%
Plains	5.1%	+11.0%
South Central	15.1%	+18.0%
Southeast	14.6%	+5.5%
West	14.4%	+4.7%

Source: Circana, Integrated Fresh, MULO, 4 weeks ending 12/31/2023

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Plains	6.0%	+3.2%
South Central	14.3%	+12.7%
Southeast	13.6%	+7.9%
West	15.1%	+1.6%

Source: Circana, Integrated Fresh, MULO, 52 weeks ending 12/31/2023