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

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Four weeks ending 11/3/2024

INTERNATIONAL FRESH PRODUCE ASSOCIATION

Strong Quad-Week Performance for Floral to Start Out the Holiday Season

Virtually all regions and floral types increased dollar and unit sales in the four weeks ending November 3rd. Roses and bouquets continued to dominate sales, while outdoor plant sales has come to a halt.

PERFORMANCE

Retail Floral Sales in the latest four and 52 weeks

Sales for the four weeks ending the November third came in just below $500 million. While down from the prior quad-week period, it represented a 4.4% increase over the same four weeks in 2023. Floral sales have been tracking ahead of year-ago levels since mid-summer.

The unit performance was also far stronger this quad-week period. Coming in at just under 50 million units, sales increased 2.9% versus the same four weeks in 2023.

The full-year view reflects sales of $9.5 billion, with a nice increase of 4.8% year-on-year. Units also remained in the plus in the 52-week view, at +1.5%.

Floral department	Dollar sales	Dollar % change vs. year ago	Unit sales	Unit % change vs. year ago
4 weeks	$495.3M	+4.4%	47.8M	+2.9%
52 weeks	$9.5B	+4.8%	909.8M	+1.5%

Source: Circana, Integrated Fresh, MULO, 4 and 52 weeks ending 11/3/2024

SALES BY TYPE

Roses Gain in Popularity and Sales

Roses and bouquets were the two biggest contributors to sales. Roses remained well ahead of bouquets in sales, though bouquets had stronger year-over-year growth of 10.5% in dollars and 9.1% in units. Roses and bouquets have had a strong showing all summer and fall.

The unit performance looked better than the prior quad-week and year-ago levels for virtually all segments, with the two exceptions of potted plants and holiday.

4 w.e 11/3/2024	Dollar sales	Dollar % change vs. year ago	Unit sales	Unit % change vs. year ago
Floral department	**$495.3M**	**+4.4%**	**47.8M**	**+2.9%**
Rose	$110.4M	+6.0%	9.3M	+2.6%
Bouquet	$103.5M	+10.5%	8.1M	+9.1%
Consumer bunch	$76.4M	+5.7%	11.7M	+6.6%
Arrangements	$75.2M	+2.7%	2.5M	+6.9%
Potted plants	$61.6M	-0.4%	5.8M	-7.8%
Outdoor plants	$33.2M	+0.4%	4.6M	+1.2%
Bulb	$4.3M	+16.2%	0.7M	+1.2%
Holiday	$1.4M	-27.2%	0.2M	-12.7%

Source: Circana, Integrated Fresh, MULO, 4 weeks ending 11/3/2024

PRICING

Inflation Across Floral Segments

The price per unit in the four-week period versus the same time period last year increased 1.5% across floral offerings. Potted plants and bulbs had above-average inflation, whereas the average price for bouquets increased more moderately and consumer bunch and arrangements came down in price year-over-year.

4 w.e. 11/3/2024	Price per unit	% Change vs. year ago
Floral department	$10.37	+1.5%
Rose	$11.92	+3.3%
Bouquet	$12.80	+1.3%
Consumer bunch	$6.53	-0.9%
Arrangements	$29.53	-3.9%
Potted plants	$10.72	+8.0%
Outdoor plants	$7.20	-0.8%
Bulb	$5.79	+14.7%
Holiday	$8.60	-16.6%

Source: Circana, Integrated Fresh, MULO, 4 weeks ending 11/3/2024

REGIONAL REVIEW

Far-Ranging Performances by Region

The quad-week performance by region varied from 8.9% dollar sales growth for the Great Lakes region to -1.2% declines for the Southeast.

In the 52-week view, all regions increased sales, with the South Central and Southeast regions being above-average performers.

4 w.e. 11/3/2024	Share of floral $	Floral $ sales growth vs. year ago
Total US	100.0%	+4.4%
California	15.0%	+4.0%
Great Lakes	11.4%	+8.9%
Mid-South	11.3%	+5.6%
Northeast	12.9%	+6.1%
Plains	5.2%	+7.9%
South Central	16.4%	+3.9%
Southeast	13.4%	-1.2%
West	14.4%	+3.8%

Source: Circana, Integrated Fresh, MULO, 4 weeks ending 11/3/2024

52 w.e. 11/3/2024	Share of floral $	Floral $ sales growth vs. year ago
Total US	100.0%	+4.8%
California	13.4%	+3.5%
Great Lakes	12.7%	+3.2%
Mid-South	11.1%	+4.4%
Northeast	13.5%	+2.6%
Plains	6.0%	+4.6%
South Central	14.4%	+8.1%
Southeast	13.0%	+6.1%
West	15.9%	+5.5%

Source: Circana, Integrated Fresh, MULO, 52 weeks ending 11/3/2024

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