

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