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

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Four weeks ending 4/21/2024

INTERNATIONAL FRESH PRODUCE ASSOCIATION

Strong 52-Week Floral Sales, but Slight Dip in April Due to Easter Shift

Floral sales in Circana's wider MULO+ universe continue to track far ahead of year-ago levels in both dollars and units with strong holiday and everyday demand. The Southeast is emerging as a strong growth region for floral.

IMPRESSIVE GROWTH

The Results for the Weeks ending April 21st 2024

Easter Sunday shifted from April 9th in 2023 to March 31st in 2024. That meant Easter-related floral sales moved into the first quarter after many years of being a second-quarter holiday. Both years were reflected in the quad-week period. However, the sales taking place during the weeks leading up to the holiday were only reflected for Easter 2023, whereas the early Easter purchases fell into the prior quad-week report for 2024. Purchases for items such as Easter lilies start weeks in advance of the holidays, as reflected in the last floral performance report.

With $872 million in quad-week sales, the floral department experienced virtually flat dollar sales, which units were down 2.8%. This is no surprise given the impact of the very different Easter timing.

Annual floral department sales in Circana's MULO+ channels totaled $9.2 billion. These outlets sold 902 million units in the past year. The stellar performance of the past few months have pulled the 52-week view into the plus, with units up 1.7%.

Floral department	Dollar sales	Dollar % change vs. year ago	Unit sales	Unit % change vs. year ago
4 weeks	$871.6M	+0.4%	98.9M	-2.8%
52 weeks	$9.21B	+6.3%	902M	+1.7%

Source: Circana, Integrated Fresh, MULO, 4 and 52 weeks ending 4/21/2024

SALES BY TYPE

Outdoor plants take over as the number one seller

Whereas potted plants were the top seller in the prior quad-week report, driven by Easter lilies, outdoor plants took over as the biggest seller in the four weeks ending April 21st. Easter signals the official start of the outdoor season and with $203.4 million in sales, outdoor plants increased dollar sales by 1.7%, but unit sales fell short of last year by 2.0%.

Potted plants remained the number two seller, but due to the shift in Easter timing, lost ground in both dollars and units.

4 w.e 4/21/2024	Dollar sales	Dollar % change vs. year ago	Unit sales	Unit % change vs. year ago
Floral department	**$871.6M**	**+0.4%**	**98.9M**	**-2.8%**
Outdoor plant	$203.4M	+1.7%	23.8M	-2.0%
Potted plant	$164.3M	-12.7%	16.8M	-16.2%
Bouquet	$123.1M	+8.8%	10.0M	+7.2%
Consumer bunch	$103.3M	+2.8%	15.8M	+3.8%
Rose	$102.3M	+7.9%	8.2M	+8.1%
Arrangement	$81.7M	+4.3%	2.9M	+0.8%
Bulb	$29.0M	+5.7%	4.4M	+3.7%
Holiday	$6355K	+34.2%	94K	+42.7%

Source: Circana, Integrated Fresh, MULO, 4 weeks ending 4/21/2024

PRICING

Mild Inflation for Floral

The quad week experienced mild inflation. The average price per unit was $8.81, which was up 3.3% versus year ago. This was predominantly driven by outdoor and potted plants.

4 w.e. 4/21/2024	Price per unit	% Change vs. year ago
Floral department	**$8.81**	**+3.3%**
Outdoor plant	$8.55	+3.8%
Potted plant	$9.79	+4.1%
Bouquet	$12.27	+1.5%
Consumer bunch	$6.54	-1.0%
Rose	$12.52	-0.2%
Arrangement	$28.62	+3.5%
Bulb	$6.63	+1.8%
Holiday	$6.75	-6.0%

Source: Circana, Integrated Fresh, MULO, 4 weeks ending 4/21/2024

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REGIONAL REVIEW

Far ranging performances by region

Whereas last quad week all regions contributed to the dollar sales growth, this quad week only delivered year-on-year growth for the Plains, South Central, Southeast and West.

In the 52-week view, all regions increased dollar sales, with the strongest performance for the South Central and Southeast.

4 w.e. 4/21/2024	Share of floral $	Floral $ sales growth vs. year ago
Total US	**100.0%**	**+0.4%**
California	10.4%	-2.9%
Great Lakes	12.3%	-1.8%
Mid-South	12.5%	-2.5%
Northeast	14.1%	-7.9%
Plains	6.0%	+1.2%
South Central	14.8%	+0.3%
Southeast	13.7%	+4.3%
West	16.2%	+12.8%

Source: Circana, Integrated Fresh, MULO, 4 weeks ending 4/21/2024

52 w.e. 4/21/2024	Share of floral $	Floral $ sales growth vs. year ago
Total US	100.0%	+6.3%
California	13.4%	+3.2%
Great Lakes	12.8%	+4.6%
Mid-South	11.1%	+6.0%
Northeast	13.6%	+3.6%
Plains	6.0%	+3.9%
South Central	14.3%	+13.0%
Southeast	12.9%	+7.8%
West	15.9%	+7.1%

Source: Circana, Integrated Fresh, MULO, 52 weeks ending 4/21/2024

MARKET COVERAGE REMINDER

Circana MULO+ Universe

The monthly floral report reflects MULO+ — an expanded market view that includes mass/supercenters, grocery stores, military, club, direct-to-consumer delivery companies as well as several e-commerce players. This universe includes additional retailers that previously did not share data nor were projected in the data. It delivers an average expansion of 15% across total CPG.

All time period history and geographies have been updated to MULO+.