

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

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Four weeks ending 6/15/2025



Floral Sales Growth Is Accelerating in Early Summer

Robust outdoor plant sales combined with continued demand growth in bouquets and roses drove a strong sales cycle for the quad-week period ending mid-May.

PERFORMANCE



Retail Floral Sales in the Latest Four and 52 Weeks

Sales for the four weeks ending the June 15 include the week leading up to Father's Day. Father's Day doesn't generate near the business of a Mother's Day or Easter and the quad-week period came in at \$882 million.

Nevertheless, both dollars and units grew rather substantially with strong everyday demand for bouquets, roses and outdoor plants. Dollar sales increased nearly 8% and unit sales grew 3.1%.

The strong performance of the past two months pulled up the full-year picture. Dollar sales now trend 4.5% above year-ago levels and unit sales jumped 1.6%. Retail unit sales are closing in on one billion annually.

| Floral department | Dollar sales | Dollar % change vs. year ago | Unit sales | Unit % change vs. year ago |
|-------------------|--------------|------------------------------|------------|----------------------------|
| 4 weeks | \$882.3M | +7.7% | 95.9M | +3.1% |
| 52 weeks | \$9.87B | +4.5% | 929.1M | +1.6% |

Source: Circana, Integrated Fresh, MULO, 4 and 52 weeks ending 6/15/2025

SALES
BY TYPE

Outdoor Plants, Bouquets and Roses Deliver Big for Floral

"Floral growth was supported by both outdoor plants and in-home flowers," said Colleen Fagundus, IFPA's Director of Floral. "Outdoor plants were easily the biggest subcategory, but bouquets and roses had a very strong mid-May through mid-June sales cycle. Our U.K. report also showed strength for mixed bouquets, but sunflowers stood out as an exciting summer offering to capture that extra trip in between major floral holidays."

| 4 w.e 6/15/2025 | Dollar sales | Dollar % change vs. year ago | Unit sales | Unit % change vs. year ago |
|--------------------------|-----------------|------------------------------|--------------|----------------------------|
| Floral department | \$882.3M | +7.7% | 95.9M | +3.1% |
| Outdoor plants | \$264.0M | +6.0% | 35.5M | +1.3% |
| Bouquets | \$139.6M | +12.8% | 10.2M | +6.8% |
| Roses | \$128.4M | +9.8% | 9.0M | +3.4% |
| Potted plants | \$103.0M | +2.7% | 9.9M | -2.3% |
| Consumer bunch | \$97.9M | +5.8% | 14.0M | +1.6% |
| Arrangements | \$81.5M | +5.9% | 2.8M | +5.5% |
| Bulbs | \$4.1M | -11.3% | 1.2M | -6.0% |
| Holiday | \$0.6M | -3.6% | 0.9M | -5.7% |

Source: Circana, Integrated Fresh, MULO, 4 weeks ending 6/15/2025

PRICING



Inflation Across Floral Segments

The price per unit during the latest four weeks averaged \$9.20. Most subcategories experienced inflation which drove an overall increase of 4.5% on a per unit basis. Roses had the highest year-over-year price increases, whereas arrangements were mostly unchanged.

| 4 w.e. 6/15/2025 | Price per unit | % Change vs. year ago |
|--------------------------|----------------|-----------------------|
| Floral department | \$9.20 | +4.5% |
| Outdoor plants | \$7.43 | +4.6% |
| Bouquets | \$13.65 | +5.6% |
| Roses | \$14.21 | +6.2% |
| Potted plants | \$10.32 | +5.1% |
| Consumer bunch | \$7.01 | +4.1% |
| Arrangements | \$29.61 | +0.4% |
| Bulbs | \$3.39 | -5.6% |
| Holiday | \$6.92 | +2.2% |

Source: Circana, Integrated Fresh, MULO, 4 weeks ending 6/15/2025

REGIONAL REVIEW



Far-Ranging Performances by Region

Regional performances ranged widely. Several regions generated double-digit increases during the four weeks ending mid-June, including the Great Lakes, Mid-South, South Central and Southeast.

In the 52-week view, all regions grew, with the biggest gains generated by the South Central and Southeast regions.

| 4 w.e. 6/15/2025 | Share of floral \$ | Floral \$ sales growth vs. year ago |
|------------------|--------------------|-------------------------------------|
| Total US | 100.0% | +7.7% |
| California | 11.9% | +4.6% |
| Great Lakes | 16.2% | +13.2% |
| Mid-South | 10.3% | +10.7% |
| Northeast | 15.5% | +4.3% |
| Plains | 7.0% | +8.8% |
| South Central | 11.3% | +12.6% |
| Southeast | 10.0% | +11.0% |
| West | 17.7% | +1.4% |

Source: Circana, Integrated Fresh, MULO, 4 weeks ending 6/15/2025

| 52 w.e. 6/15/2025 | Share of floral \$ | Floral \$ sales growth vs. year ago |
|-------------------|--------------------|-------------------------------------|
| Total US | 100.0% | +4.5% |
| California | 13.1% | +2.7% |
| Great Lakes | 12.8% | +3.9% |
| Mid-South | 11.1% | +4.3% |
| Northeast | 13.6% | +4.4% |
| Plains | 6.0% | +5.5% |
| South Central | 14.7% | +6.8% |
| Southeast | 13.1% | +5.9% |
| West | 15.6% | +2.9% |

Source: Circana, Integrated Fresh, MULO, 52 weeks ending 6/15/2025