

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

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Four weeks ending 5/18/2025



Outdoor Plant Sales Drive a Strong Quad-Week

Improved weather patterns in Northern states kick started outdoor plant sales. Roses and bouquets provided additional gains for a strong quad-week performance.

PERFORMANCE

Retail Floral Sales in the Latest Four and 52 Weeks

Sales for the four weeks ending the May 18th reflect the tail end of the Easter purchases for retailers who report data on Mondays versus Sundays as well as robust outdoor plant sales.

Sales rose from \$911 million in the prior quad-week to \$2.0 billion in the four weeks ending May 18th. This reflects a robust 7.4% increase in dollar sales year-on-year, but also a high 4.8% improvement in unit sales. Where units had fallen behind year-ago levels for several months running, this helps improve the 52-week pictures as well.

The full-year view reflects sales of \$9.79 billion. This is up 3.8% year-on-year. The stronger quad-week performance pulled up the annual unit growth to +0.9%.

Floral department	Dollar sales	Dollar % change vs. year ago	Unit sales	Unit % change vs. year ago
4 weeks	\$1.97B	+7.4%	171.8M	+4.8%
52 weeks	\$9.79B	+3.8%	923.7M	+0.9%

Source: Circana, Integrated Fresh, MULO, 4 and 52 weeks ending 5/18/2025

SALES
BY TYPE

Spring Temperatures Kickstart Outdoor Plant Sales

"We saw strong quad-week sales across nearly every category," said Colleen Fagundus, IFPA's Director of Floral. "Outdoor plant sales, which had been delayed by colder weather in the North surged past last year's numbers. Roses and bouquets also had a very strong month, with some residual Easter reporting."

4 w.e 5/18/2025	Dollar sales	Dollar % change vs. year ago	Unit sales	Unit % change vs. year ago
Floral department	\$1.97B	+7.4%	171.8M	+4.8%
Outdoor plants	\$473.0M	+7.0%	52.5M	+3.9%
Roses	\$353.1M	+9.2%	23.2M	+2.8%
Bouquets	\$342.0M	+11.1%	21.9M	+9.0%
Arrangements	\$270.2M	+7.3%	8.4M	+5.3%
Potted plants	\$253.5M	+0.9%	20.2M	+4.2%
Consumer bunch	\$160.9M	+5.8%	21.6M	+2.0%
Bulbs	\$17.2M	-3.1%	2.9M	-6.8%
Holiday	\$0.5M	-19.1%	65K	-17.8%

Source: Circana, Integrated Fresh, MULO, 4 weeks ending 5/18/2025

PRICING



Inflation Across Floral Segments

The price per unit during the latest four weeks averaged \$11.48. Most subcategories experienced inflation, with the exception of potted plants and holiday bouquets. Roses had the highest year-over-year price increases. Across all floral offerings, prices increased 2.5%.

4 w.e. 5/18/2025	Price per unit	% Change vs. year ago
Floral department	\$11.48	+2.5%
Outdoor plants	\$9.01	+3.0%
Roses	\$15.21	+6.2%
Bouquets	\$15.61	+1.9%
Arrangements	\$32.27	+1.9%
Potted plants	\$12.58	-3.2%
Consumer bunch	\$7.45	+3.8%
Bulbs	\$5.86	+4.0%
Holiday	\$7.05	-1.7%

Source: Circana, Integrated Fresh, MULO, 4 weeks ending 5/18/2025

REGIONAL REVIEW



Far-Ranging Performances by Region

Whereas floral sales declined in the Great Lakes and Northeast regions last quad-week period, all regions gained year-over-year this time. The South Central had the strongest growth, at +13.0%, followed by the Northeast.

In the full-year view, growth is led by the South Central and Southeast regions.

4 w.e. 5/18/2025	Share of floral \$	Floral \$ sales growth vs. year ago
Total US	100.0%	+7.4%
California	10.7%	+0.9%
Great Lakes	15.2%	+6.2%
Mid-South	11.1%	+7.6%
Northeast	14.5%	+10.7%
Plains	7.1%	+7.4%
South Central	13.4%	+13.0%
Southeast	11.8%	+8.3%
West	16.1%	+4.9%

Source: Circana, Integrated Fresh, MULO, 4 weeks ending 5/18/2025

52 w.e. 5/18/2025	Share of floral \$	Floral \$ sales growth vs. year ago
Total US	100.0%	+3.8%
California	13.2%	+2.7%
Great Lakes	12.7%	+1.6%
Mid-South	11.1%	+3.2%
Northeast	13.6%	+3.7%
Plains	6.0%	+4.2%
South Central	14.7%	+6.3%
Southeast	13.1%	+5.3%
West	15.7%	+3.2%

Source: Circana, Integrated Fresh, MULO, 52 weeks ending 5/18/2025