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

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Four weeks ending 5/19/2024

Mother's Day Floral Sales Double Typical Quad-Week Sales Results

While everyday floral demand has been strong all year, sales during the week leading up to Mother's Day reflect the enormous incrementality of celebrations and special occasions.

HOLIDAY IMPACT

The Results for the weeks ending May 19th 2024.

Celebrated the second Sunday in May, Mother's Day fell on May 12th this year. The impact of the holiday in this quad week was impressive. Whereas the four weeks ending April 21st generated about $872 million in sales, the four weeks ending May 19th generated $1.8 billion. This underscores the vast sales opportunity of a well-executed Mother's Day floral set.

Dollar sales increased by nearly 2% in the quad-week period but this was boosted by mild inflation. Unit sales, at 158 million bunches, were down a little more than 3%.

Annual floral department sales in Circana's MULO+ channels totaled $9.3 billion. These outlets sold 903 million units in the past year. The annual unit performance remains in the plus, at +1.6%.

Floral department	Dollar sales	Dollar % change vs. year ago	Unit sales	Unit % change vs. year ago
4 weeks	$1.779B	+1.8%	158.0M	-3.1%
52 weeks	$9.28B	+5.8%	902.9M	+1.6%

Source: Circana, Integrated Fresh, MULO, 4 and 52 weeks ending 5/19/2024

SALES BY TYPE

Outdoor plants remain the number one seller.

Mother's Day boosted the sales of roses, bouquets and arrangements that all had substantial increases in both dollars and units. Bouquets, in particular, fared well, with an 11.4% increase in dollar sales and a 6.4% increase in unit sales.

Outdoor plants remained the biggest seller in the quad-week period, at $403 million. However, after a good start in the last report, sales dropped by double digits in both dollars and units in this report.

4 w.e 5/19/2024	Dollar sales	Dollar % change vs. year ago	Unit sales	Unit % change vs. year ago
Floral department	**$1.779B**	**+1.8%**	**158.0M**	**-3.1%**
Outdoor plant	$403M	-11.6%	45.8M	-15.2%
Roses	$321M	+8.4%	22.5M	+5.1%
Bouquets	$304M	+11.4%	19.9M	+6.4%
Arrangements	$249M	+7.0%	7.8M	+4.1%
Potted plants	$245M	-0.5%	19.0M	-3.5%
Consumer bunch	$151M	+9.4%	21.0M	+7.9%
Bulb	$18M	-8.1%	3.1M	+1.3%
Holiday	$0.6M	+22.8%	80K	+26.6%

Source: Circana, Integrated Fresh, MULO, 4 weeks ending 5/19/2024

INTERNATIONAL FRESH PRODUCE ASSOCIATION

PRICING

Floral prices are ticking back up.

Floral prices had leveled off at the beginning of the year, but increased 5% in the quad-week period. The average price per unit was $11.26, which was up 5.0% versus year ago. Outdoor plants and bouquets have the highest inflation, whereas arrangements and consumer bunch price increases were much milder.

4 w.e. 5/19/2024	Price per unit	% Change vs. year ago
Floral department	$11.26	+5.0%
Outdoor plant	$8.79	+4.2%
Roses	$14.30	+3.2%
Bouquets	$15.27	+4.7%
Arrangements	$31.74	+2.8%
Potted plants	$12.88	+3.2%
Consumer bunch	$7.18	+1.4%
Bulb	$5.62	-9.2%
Holiday	$7.17	-3.0%

Source: Circana, Integrated Fresh, MULO, 4 weeks ending 5/19/2024

REGIONAL REVIEW

Far ranging performances by region

The quad-week performance by region varied from 6.6% dollar sales growth for the Southeast to a decline of almost 1% for the Western region of the U.S.

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

4 w.e. 5/19/2024	Share of floral $	Floral $ sales growth vs. year ago
Total US	100.0%	+1.8%
California	11.6%	+1.8%
Great Lakes	14.9%	+0.6%
Mid-South	11.2%	+2.5%
Northeast	13.8%	-0.6%
Plains	7.1%	-0.3%
South Central	12.9%	+6.0%
Southeast	11.9%	+6.6%
West	16.6%	-0.9%

Source: Circana, Integrated Fresh, MULO, 4 weeks ending 5/19/2024

52 w.e. 5/19/2024	Share of floral $	Floral $ sales growth vs. year ago
Total US	100.0%	+5.8%
California	13.4%	+3.0%
Great Lakes	12.8%	+4.8%
Mid-South	11.1%	+5.7%
Northeast	13.5%	+2.5%
Plains	6.0%	+4.0%
South Central	14.4%	+12.6%
Southeast	13.0%	+8.0%
West	15.8%	+4.9%

Source: Circana, Integrated Fresh, MULO, 52 weeks ending 5/19/2024

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+.