

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

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Four weeks ending 3/23/2025



Easter Shift Wreaks Havoc on Floral Comp Sales

On the one hand, Easter powerhouses, such as indoor plants, suffered deep declines. On the other hand, everyday powerhouses, including bouquets and roses, show that U.S. consumers continue to prioritize flowers amid substantial financial pressure.

PERFORMANCE



Retail Floral Sales in the Latest Four and 52 Weeks

Sales for the four weeks ending the March 23rd were far less than the prior quad-week period that included Valentine's Day sales. This quad-week came in just under \$637 million, down from \$1.3 billion for the four weeks ending February 23rd – underscoring the substantial impact of the holiday.

Additionally, Easter 2024 fell on March 31st and this quad-week period would have already included some of the holiday-related sales. This is especially true for indoor/potted plants that are typically bought further out from the holiday. In 2025, Easter fell on April 20th, fully three weeks later. As such, it is unlikely that the four weeks ending March 23rd 2025 reflect much, if any, Easter-related sales. As such, the 3.8% year-over-year decrease in unit sales is hardly surprising and likely more related to the Easter date shift than the continued economic pressure.

Floral department	Dollar sales	Dollar % change vs. year ago	Unit sales	Unit % change vs. year ago
4 weeks	\$637M	-0.1%	70.5M	-3.8%
52 weeks	\$9.57B	+2.6%	908.3M	+0.8%

Source: Circana, Integrated Fresh, MULO, 4 and 52 weeks ending 3/23/2025

SALES
BY TYPE

Bouquets Overtake Roses as the Number One Seller

Driven by the shift in Easter dates, year-over-year dollar sales for the quad-week period were flat and units dropped by 3.8%. Unsurprisingly, potted plants were the hardest hit area, followed by outdoor plants and bulbs.

Bouquets and roses did gain in dollars and units, with roses showing robust year-over-year growth of close to 10%.

4 w.e 3/23/2025	Dollar sales	Dollar % change vs. year ago	Unit sales	Unit % change vs. year ago
Floral department	\$636.8M	-0.1%	70.5M	-3.8%
Bouquet	\$107.4M	+6.5%	8.6M	+4.9%
Roses	\$106.6M	+9.7%	8.3M	+9.5%
Potted plants	\$103.0M	-13.1%	10.1M	-14.6%
Consumer bunch	\$86.3M	+0.2%	13.3M	-1.8%
Arrangements	\$73.0M	+3.8%	2.4M	+0.3%
Outdoor plants	\$61.8M	-4.4%	6.9M	-8.5%
Bulbs	\$33.7M	-7.9%	4.4M	-8.5%
Holiday	\$0.7M	+0.1%	102K	+6.9%

Source: Circana, Integrated Fresh, MULO, 4 weeks ending 3/23/2025

PRICING

Inflation Across Floral Segments.

The price per unit in the four-week period is far lower than that during the last quad week that reflected Valentine's Day bouquets. The overall price per floral purchase was \$9.04, which was up about 4% versus least year. Only roses had fairly similar pricing compared to last year.



4 w.e. 3/23/2025	Price per unit	% Change vs. year ago
Floral department	\$9.04	+3.9%
Bouquet	\$12.55	+1.6%
Roses	\$12.87	+0.1%
Potted plants	\$10.15	+1.8%
Consumer bunch	\$6.50	+2.0%
Arrangements	\$30.32	+3.5%
Outdoor plants	\$8.98	+4.5%
Bulbs	\$7.75	+0.7%
Holidays	\$6.42	-6.4%

Source: Circana, Integrated Fresh, MULO, 4 weeks ending 3/23/2025

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. 3/23/2025	Share of floral \$	Floral \$ sales growth vs. year ago
Total US	100.0%	-0.1%
California	13.4%	+1.8%
Great Lakes	11.0%	-3.0%
Mid-South	11.6%	-2.6%
Northeast	11.9%	-1.6%
Plains	5.4%	-2.3%
South Central	16.3%	+1.4%
Southeast	15.2%	+3.3%
West	15.3%	-0.5%

Source: Circana, Integrated Fresh, MULO, 4 weeks ending 3/23/2025

52 w.e. 3/23/2025	Share of floral \$	Floral \$ sales growth vs. year ago
Total US	100.0%	+2.6%
California	13.4%	+2.3%
Great Lakes	12.6%	+0.6%
Mid-South	11.1%	+1.9%
Northeast	13.4%	+0.7%
Plains	6.0%	+2.3%
South Central	14.5%	+4.5%
Southeast	13.1%	+5.2%
West	15.8%	+3.1%

Source: Circana, Integrated Fresh, MULO, 52 weeks ending 3/23/2025