

June 2023 Floral Sales Pulled Ahead of Year-Ago Levels

June 2023

“The four weeks ending on Father’s Day (June 18) showed a sharp improvement over year-ago levels. The dollar performance during the four weeks experienced a robust 7.6% increase over the same 4-week period in 2022. And, for the first time in many months, it was not just inflation that boosted dollar sales, but floral sales also improved in units by 1.3%”

– Debbie Zoellick, Director of Floral, IFPA



The latest Circana (formerly IRI) results bring some great news for the floral industry.

Floral department	Dollar sales	Dollar % change vs. YA	Unit sales	Unit % change vs. YA
4 weeks ending 6/18/2023	\$728M	+7.6%	89.2M	+1.3%
52 weeks ending 6/18/2023	\$7.8B	+2.4%	819.0M	-3.9%

Source: Circana, Integrated Fresh, MULO, 4 weeks ending 6/18/2023

Sales during the 52 weeks ending 6/18/2023 were up 2.4% in dollars, though down 3.9% in units. The very different unit and dollar growth performance shows the impact inflation has had on floral department sales.



June 2023 Sales by Type

Even more encouraging is that more than one area contributed to the growth and a few areas trended back in double-digit growth territory. Bouquets managed a 11.3% increase in unit sales and corresponding dollar growth of 10.8%. when comparing the four May/June weeks to the same ones last year.

4 w.e 6/18/2023	Dollar sales	Dollar % change vs. YA	Unit sales	Unit % change vs. YA
Floral department	\$727.7M	+7.6%	89.2M	+1.3%
Outdoor plants	\$245.6M	+10.0%	36.6M	+0.6%
Bouquets	\$103.7M	+10.8%	8.5M	+11.3%
Roses	\$98.0M	+11.6%	7.6M	+6.6%
Potted plants	\$91.6M	+2.0%	9.9M	-3.0%
Consumer bunch	\$78.1M	+1.5%	12.3M	-1.7%
Arrangements	\$59.7M	+9.9%	2.1M	+2.3%
Bulbs	\$4.3M	+9.1%	1.1M	+17.5%
Holiday	\$0.5M	+12.5%	0.7M	+5.4%

Source: Circana, Integrated Fresh, MULO, 4 weeks ending 6/18/2023

Regional Performance

The West and Great Lake regions had the highest share of sales, but the South Central, Southeast and Midsouth all performed substantially better-than-average in terms of their year-on-year growth performance. All regions showed dollar growth in the four-week period.



4 w.e. 6/18/2023	Share of floral \$	Floral \$ sales growth vs. year ago
Total US	100.0%	+7.6%
California	10.9%	+0.3%
Great Lakes	17.2%	+11.2%
Mid-South	10.6%	+12.5%
Northeast	15.7%	+2.4%
Plains	7.3%	+6.3%
South Central	10.5%	+15.4%
Southeast	9.9%	+12.9%
West	17.9%	+4.7%

Source: Circana, Integrated Fresh, MULO, 4 weeks ending 6/18/2023



Pricing

During the four weeks ending June 18th compared to the same time period last year, the average price per unit for floral increased by 6.2%. This is far less than the increases seen year to date. The average price per unit stood at \$8.16, with above average costs for bouquets, roses and arrangements. Two areas came down in price compared to the same four weeks in 2022, being bouquets and bulbs.

4 w.e. 6/18/2023	ACV weighted distribution	Change vs. YA (points)
Floral department	\$8.16	+6.2%
Outdoor plants	\$6.72	+9.3%
Bouquets	\$12.25	-0.4%
Roses	\$12.86	+4.7%
Potted plants	\$9.22	+5.2%
Consumer bunch	\$6.33	+3.2%
Arrangements	\$28.60	+7.4%
Bulbs	\$3.64	-7.1%
Holiday	\$7.18	+6.8%

Source: Circana, Integrated Fresh, MULO, 4 weeks ending 6/18/2023

