

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

By: Anne-Marie Roerink | President, 210 Analytics

Four weeks ending 12/1/2024



Potted Plants Were the Top Seller, but the Late Thanksgiving Timing Affects Growth Numbers

Thanksgiving fell in the last week of November in 2024, which got poinsettia sales off to a later start. This affected both dollar and unit sales, pulling down the department's results below year-ago levels.

PERFORMANCE



Retail Floral Sales in the latest four and 52 weeks

Sales for the four weeks ending the December 1st came in just above \$578 million. This was down 3.6% over the same four weeks in 2023. This reverses the positive results from the prior quad-week period.

Additionally, the floral department experienced pressure on unit sales as well. Floral demand dropped by 4.6% compared to the same four November weeks in 2023, generating just below 50 million unit. This is a change from the prior four weeks when units did increase.

The full-year view reflects sales of \$9.5 billion, with a nice increase of 4.2% year-on-year. Units also remained in the plus in the 52-week view, at +1.0%. With only one more reporting period in 2024, it appears that the floral department will come out on top for the year.

Floral department	Dollar sales	Dollar % change vs. year ago	Unit sales	Unit % change vs. year ago
4 weeks	\$578.2M	-3.6%	49.7M	-4.6%
52 weeks	\$9.5B	+4.2%	908.2M	+1.0%

Source: Circana, Integrated Fresh, MULO, 4 and 52 weeks ending 12/1/2024

SALES
BY TYPE

Potted plants become the number one seller

Potted plants rose to the number one spot in the four November weeks, with \$113 million in sales. Even so, due to the late timing of Thanksgiving in 2024, sales were down substantially in both dollars and units compared to 2023. It is likely that potted plant sales moved deeper into December and the next quad-week reporting.

Bouquets and roses continued to be strong performers, with a double-digit unit increase for roses in November.

4 w.e 12/1/2024	Dollar sales	Dollar % change vs. year ago	Unit sales	Unit % change vs. year ago
Floral department	\$578.2M	-3.6%	49.7M	-4.6%
Potted plants	\$113.0M	-13.6%	10.9M	-20.2%
Bouquets	\$111.5M	+5.1%	8.4M	+4.2%
Roses	\$106.0M	+9.8%	8.4M	+10.5%
Arrangements	\$84.8M	+1.3%	2.8M	+2.4%
Consumer bunch	\$74.8M	+6.1%	11.3M	+6.0%
Holiday	\$49.5M	-27.6%	2.2M	-26.2%
Outdoor plants	\$8.9M	-21.2%	1.1M	-5.3%
Bulbs	\$3.9M	+11.0%	0.7M	-0.4%

Source: Circana, Integrated Fresh, MULO, 4 weeks ending 12/1/2024

PRICING

Inflation Across Floral Segments.

The price per unit in the four-week period versus the same time period last year increased 1.1% across floral offerings. Potted plants and bulbs had above-average inflation, whereas the average price for roses decreased slightly.



4 w.e. 12/1/2024	Price per unit	% Change vs. year ago
Floral department	\$11.64	+1.1%
Potted plants	\$10.39	+8.3%
Bouquets	\$13.24	+0.9%
Roses	\$12.69	-0.6%
Arrangements	\$29.91	-1.1%
Consumer bunch	\$6.62	+0.1%
Holiday	\$22.86	-1.9%
Outdoor plants	\$7.99	-16.8%
Bulbs	\$5.17	+11.5%

Source: Circana, Integrated Fresh, MULO, 4 weeks ending 12/1/2024

REGIONAL REVIEW



4 w.e. 12/1/2024	Share of floral \$	Floral \$ sales growth vs. year ago
Total US	100.0%	-3.6%
California	15.3%	-7.5%
Great Lakes	11.5%	-3.5%
Mid-South	10.6%	-3.2%
Northeast	14.1%	-3.7%
Plains	5.8%	-0.7%
South Central	14.1%	+0.3%
Southeast	13.8%	-2.3%
West	14.9%	-5.1%

Source: Circana, Integrated Fresh, MULO, 4 weeks ending 12/1/2024

Far-Ranging Performances by Region

The quad-week performance by region varied from 0.3% sales growth for the South-Central region to -7.5% declines for California that also had a below-average year in the latest 52 weeks.

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

52 w.e. 12/1/2024	Share of floral \$	Floral \$ sales growth vs. year ago
Total US	100.0%	+4.2%
California	13.4%	+2.9%
Great Lakes	12.7%	+2.8%
Mid-South	11.1%	+3.8%
Northeast	13.5%	+1.9%
Plains	6.0%	+4.3%
South Central	14.5%	+7.3%
Southeast	13.0%	+5.6%
West	15.9%	+5.1%

Source: Circana, Integrated Fresh, MULO, 52 weeks ending 12/1/2024