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

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Four weeks ending 4/20/2025

Potted Plants Gain; Outdoor Plants Fall Short

While outdoor plants were the largest seller during the quad-week, the cold start to summer in much of the Northeast and Midwest led to year-over-year declines.

PERFORMANCE

Retail Floral Sales in the Latest Four and 52 Weeks

Sales for the four weeks ending the April 20th reflect the majority of Easter-related purchases. Sales rose from $637 million in the prior quad-week to $911 million in the four weeks ending Easter Sunday. While this was an increase of 1.6% year-on-year, it is important to note that the key two weeks prior to the Easter holiday went up against everyday weeks in 2024 given the very different timing in 2024 (March 31st) versus 2025 (April 20th). Additionally, units declined by about 1%. In comparison, the quad-week period that included Valentine's Day sales generated $1.3 billion.

The full-year view reflects sales of $9.61 billion. This is up 2.8% year-on-year. However, the weaker performance seen since the start of 2025 has pulled unit sales below year-ago levels, at -0.5%.

Floral department	Dollar sales	Dollar % change vs. year ago	Unit sales	Unit % change vs. year ago
4 weeks	$910.6M	+1.6%	101.2M	-1.1%
52 weeks	$9.61B	+2.8%	910.4M	-0.5%

Source: Circana, Integrated Fresh, MULO, 4 and 52 weeks ending 4/20/2025

SALES BY TYPE

Cold Spring in the Northeast and Midwest Affects Outdoor Plant Sales

The department's dollar gain of 1.6% reflects a combination of dollar growth for categories such as potted plants, roses and arrangements, and decreases for the biggest seller, outdoor plants.

Outdoor plant sales are typically closely related to weather patterns. A cold spring in the Northeast and Midwest led to substantial year-on-year decreases of -14.4% and -24.8%, respectively in these regions.

4 w.e 4/20/2025	Dollar sales	Dollar % change vs. year ago	Unit sales	Unit % change vs. year ago
Floral department	**$910.6M**	**+1.6%**	**101.2M**	**-1.1%**
Outdoor plants	$209.9M	-3.1%	24.0M	-4.4%
Potted plants	$172.9M	+2.4%	17.1M	+0.3%
Bouquets	$124.9M	+0.8%	9.6M	-4.5%
Roses	$107.1M	+4.3%	8.2M	-0.7%
Consumer bunch	$104.6M	+0.8%	15.5M	-2.4%
Arrangements	$87.3M	+6.2%	3.1M	+6.9%
Bulbs	$28.7M	-3.1%	4.2M	-5.4%
Holiday	$0.5M	-20.8%	77K	-17.9%

Source: Circana, Integrated Fresh, MULO, 4 weeks ending 4/20/2025

PRICING

Inflation Across Floral Segments.

The price per unit during the latest four weeks averaged $9. Most subcategories experienced inflation, with the exception of arrangements and holiday bouquets. Bouquets and roses had the highest year-over-year price increases. Across all floral offerings, prices increased 2.8%.

4 w.e. 4/20/2025	Price per unit	% Change vs. year ago
Floral department	**$9.00**	**+2.8%**
Outdoor plants	$8.76	+1.3%
Potted plants	$10.09	+2.2%
Bouquets	$12.96	+5.6%
Roses	$13.14	+5.0%
Consumer bunch	$6.76	+3.3%
Arrangements	$28.38	-0.6%
Bulbs	$6.84	+2.4%
Holiday	$6.52	-3.5%

Source: Circana, Integrated Fresh, MULO, 4 weeks ending 4/20/2025

REGIONAL REVIEW

Far-Ranging Performances by Region

Affected by weak outdoor plant sales, the Northeast and the Great Lakes lost ground year-over-year in the latest four weeks. Other regions, including the Southcentral and California, had a strong quad-week.

In the 52-week view, the South Central and Southeast were also the strongest growth areas.

4 w.e. 4/20/2025	Share of floral $	Floral $ sales growth vs. year ago
Total US	**100.0%**	**+1.6%**
California	10.7%	+5.9%
Great Lakes	11.7%	-4.6%
Mid-South	12.4%	+0.7%
Northeast	13.3%	-3.9%
Plains	6.3%	+4.6%
South Central	15.7%	+8.0%
Southeast	13.9%	+3.8%
West	15.9%	+0.5%

Source: Circana, Integrated Fresh, MULO, 4 weeks ending 4/20/2025

52 w.e. 4/20/2025	Share of floral $	Floral $ sales growth vs. year ago
Total US	**100.0%**	**+2.8%**
California	13.4%	+3.0%
Great Lakes	12.6%	+0.4%
Mid-South	11.1%	+2.4%
Northeast	13.4%	+1.2%
Plains	6.0%	+2.6%
South Central	14.6%	+5.2%
Southeast	13.1%	+5.1%
West	15.8%	+2.1%

Source: Circana, Integrated Fresh, MULO, 52 weeks ending 4/20/2025