

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

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Four weeks ending 12/3/2023

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Floral Rocks Thanksgiving Sales for Strong November Results

The second half of the year floral performance has been nothing less than impressive. Floral sales continued to accelerate during November and December. Reflecting strong holiday demand, sales for roses and bouquets grew double digits in units.

**STRONG
RESULTS****Continued improvement in dollar and unit performances**

According to the latest Circana (formerly IRI) results, the floral department continued to be an above-average performer in the four and 52 weeks ending December 3rd in comparison to the same set of weeks last year.

The four weeks showed a 5.4% increase in dollar sales over year-ago levels. Unit sales were up by 5.3% – making it one of the few departments with a positive growth performance. Floral dollar sales increased 4.5% in the 52-week period – underscoring the gradual improvement seen all year.

Floral department	Dollar sales	Dollar % change vs. year ago	Unit sales	Unit % change vs. year ago
4 weeks ending 12/3/2023	\$474M	+5.4%	44.6M	+5.3%
52 weeks ending 12/3/2023	\$7.9B	+4.5%	824M	-0.5%

Source: Circana, Integrated Fresh, MULO, 4 weeks ending 12/3/2023

The unit and dollar growth performances are virtually identical, signaling that inflation has slowed to a trickle.

SALES BY TYPE**Strong sales performances by the powerhouses solidifies solid quad-week sales.**

At the category level, performances were mixed with strong growth for bouquets, roses and arrangements. This month also saw substantial growth in units overall, driven by double-digit increases in bouquets, roses and strong single-digit increases in arrangements and consumer bunches.

4 w.e 12/3/2023	Dollar sales	Dollar % change vs. year ago	Unit sales	Unit % change vs. year ago
Floral department	\$474M	+5.4%	44.6M	+5.3%
Bouquets	\$97M	+9.0%	7.5M	+10.5%
Potted plants	\$94M	-5.4%	10.5M	-1.0%
Roses	\$89M	+15.3%	7.2M	+14.8%
Arrangements	\$72M	+9.7%	2.4M	+6.7%
Consumer bunch	\$64M	+8.0%	10.0M	+6.3%
Holiday	\$25M	-3.0%	1.1M	-8.7%
Outdoor plants	\$9M	+3.0%	1.1M	-1.2%
Bulbs	\$3M	-19.7%	0.7M	-14.7%

Source: Circana, Integrated Fresh, MULO, 4 weeks ending 12/3/2023

REGIONAL REVIEW



South Central had a very strong month

Both the share of sales and the contributions to new dollars were vastly different across the nine Circana regions. The Northeast and Southeast regions were the biggest regions for sales.

All regions recorded growth in November/December, and the Southeast grew by double digits.

The Mid-South and the Southeast had an above-average performance.



4 w.e. 12/3/2023	Share of floral \$	Floral \$ sales growth vs. year ago
Total US	100.0%	+5.3%
California	14.2%	+1.0%
Great Lakes	11.0%	+4.1%
Mid-South	11.5%	+7.5%
Northeast	15.0%	+5.8%
Plains	5.2%	+3.5%
South Central	14.2%	+13.2%
Southeast	14.8%	+6.6%
West	14.1%	+0.9%

Source: Circana, Integrated Fresh, MULO, 4 weeks ending 12/3/2023

PRICING

Continued deceleration of inflation.

Prices at retail remained unchanged from the levels in 2022. Prices decreased some for bouquets and potted plants, whereas prices for holiday arrangements and outdoor plant still experienced some price increases. The average price per unit stood at \$10.63, with above average costs for bouquets, roses and arrangements.



4 w.e. 12/3/2023	Price per unit	% Change vs. year ago
Floral department	\$10.63	0.0%
Bouquets	\$12.89	-1.3%
Potted plants	\$8.94	-4.4%
Roses	\$12.36	+0.5%
Arrangements	\$29.74	+2.9%
Consumer bunch	\$6.40	+1.7%
Holiday	\$21.80	+6.2%
Outdoor plants	\$8.63	+4.2%
Bulbs	\$4.36	-5.9%

Source: Circana, Integrated Fresh, MULO, 4 weeks ending 12/3/2023