



Christmas Tree Sales Started Gearing up in November

Building onto years of performance reporting for fresh floral sales at retail in the United States, IFPA is launching a counterpart for floral sales trends in the U.K.

Sales Performance

The quad-week period ending November 29, 2025 was somewhat smaller than the preceding four weeks. At \$149 million, dollar sales increased 3.0% year-over-year, but unit sales fell short of 2024 levels. This affected the annual performance with the rate of growth slowing to +2.1%. Annually, floral is a \$2.5 billion category in the U.K.

Total floral	Latest 4 weeks		Latest 52 weeks	
	Dollar sales	Dollars vs. year ago	Dollar sales	Dollars vs. year ago
Sales in USD	\$148.9M	+3.0%	\$2.5B	+5.0%
Sales in units	18.7M	-3.7%	376.6M	+2.1%

Source: NielsenIQ, Global SnapShot, 4 and 52 weeks ending November 29, 2025

Pricing

Across all floral items, including plants and flowers, the price per unit averaged \$6.56 for the full year. The four-week price average was slightly higher, at \$7.96. which was up 7.0% year-on-year. The average price is affected by the mix of items, which included Christmas trees in the current quad-week period.

	Latest 4 weeks		Latest 52 weeks	
	Price per unit	Change vs. year ago	Price per unit	Change vs. year ago
Total floral	\$7.96	+7.0%	\$6.56	+2.8%

Source: NielsenIQ, Global SnapShot, 4 and 52 weeks ending November 29, 2025

Floral Sales by Segment — Latest 4 weeks

Two categories dominated sales in the quad-week, being mixed bouquets and roses, with plants as a distant third. Christmas trees moved into forth, with \$16 million in sale, slightly behind last year. The growth performance of bouquets and roses pulled up the double-digit year-over-year decreases in poinsettias, chrysanthemums and carnations.

Top 10 sellers	Latest 4 weeks			
	US\$ sales	Dollars vs. year ago	Unit sales	Units vs. year ago
Total floral	\$148.9M	+3.0%	18.7M	-3.7%
Mixed bouquets	\$59.9M	+8.5%	5.7M	+5.6%
Roses	\$27.7M	+1.4%	4.6M	-3.6%
Plants	\$16.3M	+4.4%	2.3M	-5.2%
Christmas trees	\$8.4M	-1.3%	512K	-1.2%
Lillies	\$4.9M	-6.3%	490K	-14.5%
Poinsettia	\$4.9M	-21.0%	757K	-25.5%
Chrysanthemums	\$4.0M	-10.4%	944K	-12.2%
Carnations	\$3.8M	-15.4%	908K	-22.0%
Tulips	\$3.7M	+23.8%	635K	+11.7%
Orchid plants	\$3.7M	+18.1%	246K	+13.1%

Source: NielsenIQ, Global SnapShot, 4 weeks ending November 29, 2025

Floral Sales by Segment — Latest 52 weeks

Flowers and plants generated \$2.5 billion in the latest 52 weeks, reflecting a substantial increase of 5.0%. Dollar gains were a mix of unit growth (+2.1%) and inflation. The last few subdued quad-week periods have resulted in some slowing in the full-year view.

Mixed bouquets remained the biggest seller, but roses overtook plants as the number two, at \$396 million. Continuing the renewed momentum seen in the last quad week, roses grew dollars and units in the full-year view.

Tulips and daffodils, the spring powerhouses, are an area of interest. While mid-sized sellers, their strong dollar and unit growth over the full-year view signal an opportunity for 2026.

Top sellers	Latest 52 weeks			
	US\$ sales	Dollars vs. year ago	Unit sales	Units vs. year ago
Total floral	\$2.5B	+5.0%	376.6M	+2.1%
Mixed bouquets	\$926M	+7.4%	87.2M	+5.3%
Roses	\$396M	+6.1%	63.5M	+1.9%
Plants	\$361M	-0.5%	64.8M	-3.8%
Tulips	\$181M	+16.3%	30.8M	+4.3%
Lillies	\$72M	-7.2%	7.7M	-12.4%
Carnations	\$70M	+0.5%	17.3M	-4.1%
Daffodils	\$70M	+28.7%	45.9M	+23.7%
Orchid plants	\$65M	-1.1%	4.4M	-5.2%
Chrysanthemums	\$61M	-8.5%	13.9M	-10.0%
Alstromeria	\$36M	-3.4%	7.8M	-6.7%

Source: NielsenIQ, Global SnapShot, 52 weeks ending November 29, 2025