

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

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Four weeks ending 8/10/2025



Roses and Bouquets Help Deliver Robust Gains for Floral During the Summer

Inflation hand-in-hand with demand growth led to robust gains in dollars and units for the weeks between mid-July and mid-August. Roses took the lead, closely followed by bouquets. Favorable weather also resulted in continued growth for outdoor plants.

PERFORMANCE

Retail Floral Sales in the Latest Four and 52 Weeks

August floral sales picked up where July left off with strong dollar and unit gains. The four weeks ending August 10, 2025 generated \$513 million in floral sales, which was a year-over-year increase of nearly 9%. While inflation played a role, unit sales also increased substantially, at +5.1%.

The full-year view also continued to improve. Dollar sales are closing in on the \$10 billion mark, with year-over-year sales gains of 4.9%. Floral sold 935 million units in the past year, up 1.9%. This signals continued improvement over the flat-to-down start of the year.

| Floral department | Dollar sales | Dollar % change vs. year ago | Unit sales | Unit % change vs. year ago |
|-------------------|--------------|------------------------------|------------|----------------------------|
| 4 weeks | \$512.6M | +8.6% | 48.8M | +5.1% |
| 52 weeks | \$9.97B | +4.9% | 935.3M | +1.9% |

Source: Circana, Integrated Fresh, MULO, 4 and 52 weeks ending 8/10/2025

SALES
BY TYPE

Bouquets and Roses Account for Majority of Summer Sales

"For the first time in many months, we saw roses overtake bouquets as the top floral category in dollars," said Colleen Fagundus, IFPA's Director of Floral. "Generating \$121 million between mid-July and mid-August, roses delivered double-digit dollar gains, though inflation played a role. Bouquets had the higher unit gains, at +4.2%. Consumer bunch and arrangements also did well in late summer."

The sales of outdoor plants is very weather dependent. The favorable summer weather resulted in \$34 million in outdoor plant sales, up nearly 11% year-over-year.

| 4 w.e 8/10/2025 | Dollar sales | Dollar % change vs. year ago | Unit sales | Unit % change vs. year ago |
|--------------------------|-----------------|------------------------------|--------------|----------------------------|
| Floral department | \$512.6M | +8.6% | 48.8M | +5.1% |
| Roses | \$120.7M | +10.4% | 9.9M | +3.4% |
| Bouquets | \$101.0M | +10.5% | 7.6M | +4.2% |
| Consumer bunch | \$75.5M | +7.7% | 11.5M | +4.6% |
| Potted plants | \$74.8M | +1.7% | 6.9M | -1.8% |
| Arrangements | \$71.9M | +8.5% | 2.4M | +8.5% |
| Outdoor plants | \$33.8M | +10.6% | 5.0M | +8.6% |
| Bulbs | \$788K | +2.9% | 253K | -4.7% |
| Holiday bouquets | \$359K | -4.7% | 51K | -11.3% |

Source: Circana, Integrated Fresh, MULO, 4 weeks ending 8/10/2025

PRICING



Inflation Across Floral Segments

The price per unit during the latest four weeks averaged \$10.50, which was more than a dollar higher than the price over the past couple of months. Most subcategories experienced inflation on a year-over-year basis, ranging from 6.7% for roses to flat prices for arrangements.

| 4 w.e. 8/10/2025 | Price per unit | % Change vs. year ago |
|--------------------------|----------------|-----------------------|
| Floral department | \$10.50 | +3.4% |
| Roses | \$12.25 | +6.7% |
| Bouquets | \$13.25 | +6.0% |
| Consumer bunch | \$6.58 | +3.0% |
| Potted plants | \$10.80 | +3.5% |
| Arrangements | \$30.45 | +0.0% |
| Outdoor plants | \$7.05 | +1.9% |
| Bulbs | \$3.12 | +8.0% |
| Holiday bouquets | \$7.01 | +7.3% |

Source: Circana, Integrated Fresh, MULO, 4 weeks ending 8/10/2025

REGIONAL REVIEW



| 4 w.e. 8/10/2025 | Share of floral \$ | Floral \$ sales growth vs. year ago |
|------------------|--------------------|-------------------------------------|
| Total US | 100.0% | +8.6% |
| California | 15.1% | +8.0% |
| Great Lakes | 11.8% | +6.3% |
| Mid-South | 10.5% | +8.7% |
| Northeast | 13.0% | +12.8% |
| Plains | 5.3% | +8.5% |
| South Central | 15.3% | +8.6% |
| Southeast | 13.4% | +11.0% |
| West | 15.7% | +6.0% |

Source: Circana, Integrated Fresh, MULO, 4 weeks ending 8/10/2025

Far-Ranging Performances by Region

In the four-week view, all regions had robust dollar gains, led by nearly 13% for the Northeast. Sales grew the least in the West, at +6.0%. In the full-year view, the Northeast, Plains and South Central were regions with above-average gains. The rate of gain was highest for the Plains and lowest for the West, at just +2.7%. The West was, however, the largest region in dollar sales.

| 52 w.e. 8/10/2025 | Share of floral \$ | Floral \$ sales growth vs. year ago |
|-------------------|--------------------|-------------------------------------|
| Total US | 100.0% | +4.9% |
| California | 13.1% | +3.2% |
| Great Lakes | 12.8% | +4.6% |
| Mid-South | 11.1% | +4.8% |
| Northeast | 13.7% | +5.7% |
| Plains | 6.0% | +5.8% |
| South Central | 14.7% | +7.1% |
| Southeast | 13.1% | +5.9% |
| West | 15.5% | +2.7% |

Source: Circana, Integrated Fresh, MULO, 52 weeks ending 8/10/2025