

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

By: Anne-Marie Roerink | President, 210 Analytics

Four weeks ending 12/28/2025



## Steady Units and Dollar Gains in December

---

*The top sellers look very different in December than any other month. Poinsettias boosted potted plant sales to the top spot, followed by roses and bouquets. December unit sales were flat, which is slightly better than the total year results that experienced a mild unit decline of -1.4%.*

## PERFORMANCE

### Retail Floral Sales in the Latest Four and 52 Weeks

The four weeks ending December 28, 2025 experienced elevated sales due to holiday gifting and home decorations. December generated \$647 million, which was an increase of 5.6% compared to December 2024. Unit sales were on par with the 2024 levels.

The strong December performance helped end the year on a strong note. In 2025, floral sales reached \$10.3 billion, up 5.8% year-on-year. Unit sales fell slightly behind 2024 levels, at -1.4%.

Floral department	Dollar sales	Dollar % change vs. year ago	Unit sales	Unit % change vs. year ago
4 weeks	\$646.81M	+5.6%	52.5M	+0.0%
52 weeks	\$10.26B	+5.8%	962.98M	-1.4%

Source: Circana, Integrated Fresh, MULO, 4 and 52 weeks ending 12/28/2025



"The December results show once more that holidays and special occasions remain times when consumers are willing to spend a little more on doing something special for others as well as themselves."

—Colleen Fagundus, IFPA's Director of Floral

## SALES BY TYPE

### Floral met the 2024 sales levels in December, despite financial pressure

Overtaking the typical top sellers, bouquets and roses, potted plants generated \$152 million in December. Despite being the top seller, this was down 2% in dollars and 6% in units compared with December 2024.

Roses did have a very strong December performance, through a combination of inflation and unit growth. Arrangements and outdoor plants (likely including Christmas trees) also experienced substantial boosts in unit sales.

4 w.e 12/28/2025	Dollar sales	Dollar % change vs. year ago	Unit sales	Unit % change vs. year ago
<b>Floral departments</b>	\$646.8M	+5.6%	52.5M	+0.0%
Potted plants	\$152.3M	-2.0%	14.9M	-6.4%
Roses	\$125.7M	+13.0%	8.8M	+7.3%
Bouquets	\$119.6M	+8.2%	8.4M	+0.7%
Arrangements	\$100.6M	+9.0%	3.3M	+5.2%
Custom bunch	\$68.7M	+3.9%	10.2M	+0.6%
Holiday bouquets	\$36.8M	+7.2%	1.8M	-1.4%
Outdoor plants	\$6.4M	+2.7%	0.7M	+10.2%
Bulbs	\$2.3M	-34.0%	0.4M	-30.5%

## PRICING

### Inflation Across Floral Segments

With elaborate gifting and home decoration arrangements in the mix, the average price per floral unit rose to \$12.32 in the latest four weeks. Virtually all the bigger sellers experienced inflation, for an overall price increase of 5.6%.

4 w.e. 12/28/2025	Price per unit	% Change vs. year ago
<b>Floral departments</b>	<b>\$12.32</b>	<b>+5.6%</b>
Potted plants	\$10.22	+4.7%
Roses	\$14.24	+5.4%
Bouquets	\$14.20	+7.3%
Arrangements	\$30.12	+3.6%
Custom bunch	\$6.76	+3.4%
Holiday bouquets	\$20.03	+8.7%
Outdoor plants	\$8.90	-6.8%
Bulbs	\$5.40	-5.1%

Source: Circana, Integrated Fresh, MULO, 4 weeks ending 12/28/2025

## REGIONAL REVIEW



### Far-Ranging Performances by Region

The regional performances varied in December. The Great Lakes was the only region to lose ground in dollar sales, while the South Central grew by double digits to reach a share of 14.8%. California also had a strong performance, with an annual share of total floral sales of 13.1% compared to 16.0% in December.

4 w.e. 12/28/2025	Share of floral \$	Floral \$ sales growth vs. year ago
<b>Total US</b>	<b>100.0%</b>	<b>+5.6%</b>
California	16.0%	+5.1%
Great Lakes	10.1%	-0.9%
Mid-South	10.3%	+3.8%
Northeast	14.1%	+7.1%
Plains	5.0%	+4.8%
South Central	14.8%	+10.1%
Southeast	14.4%	+7.0%
West	15.2%	+5.1%

Source: Circana, Integrated Fresh, MULO, 4 weeks ending 12/28/2025

52 w.e. 12/28/2025	Share of floral \$	Floral \$ sales growth vs. year ago
<b>Total US</b>	<b>100.0%</b>	<b>+5.8%</b>
California	13.1%	+4.1%
Great Lakes	12.9%	+4.4%
Mid-South	11.2%	+5.6%
Northeast	13.9%	+6.8%
Plains	6.1%	+6.1%
South Central	14.5%	+8.8%
Southeast	13.1%	+7.7%
West	15.3%	+3.2%

Source: Circana, Integrated Fresh, MULO, 52 weeks ending 12/28/2025