

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

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Four weeks ending 11/30/2025



November Brings Floral Dollar and Unit Growth

Despite the federal government shutdown and pressure on income for many, floral sales continued to accelerate in November. Dollars gains were boosted by inflation and demand growth. Roses and bouquets were instrumental in securing sales and growth.

PERFORMANCE

Retail Floral Sales in the Latest Four and 52 Weeks

November, including the Thanksgiving holiday, generated \$635 million in floral sales, about \$85 million more than October. This signals a clear holiday-driven lift. Inflation combined with growing demand pushed dollar sales up 8.1% year-over-year, while unit sales increased by 2.1%.

This strong dollar and unit performance helped improve the 52-week outlook. Annual floral sales exceeded \$10 billion, up 5.7% year-over-year. While unit sales remain slightly below year-ago levels, the gap continues to narrow and now stands at -1.3%.

Floral department	Dollar sales	Dollar % change vs. year ago	Unit sales	Unit % change vs. year ago
4 weeks	\$635.1M	+8.1%	51.7M	+2.1%
52 weeks	\$10.21B	+5.7%	962.5M	-1.3%

Source: Circana, Integrated Fresh, MULO, 4 and 52 weeks ending 11/30/2025



"I was pleased to see strong floral results in a month affected by the federal shutdown and the second-lowest consumer confidence reading in years. It truly underscores the importance of fresh flowers during challenging times."

—Colleen Fagundus, IFPA's Director of Floral

SALES BY TYPE

Bouquets and Roses Had a Very Strong November

Roses and bouquets drove the majority of the \$635 million in floral sales, at \$125 million and \$121 million, respectively. Potted plants were a close third. Whereas bouquets and roses grew dollars and units, potted plants lost ground compared with November 2024, especially in unit sales.

Holiday bouquets also had a good month, with solid increases on monthly sales of \$58 million.

4 w.e 11/30/2025	Dollar sales	Dollar % change vs. year ago	Unit sales	Unit % change vs. year ago
Floral departments	\$635.1M	+8.1%	51.7M	+2.1%
Bouquets	\$124.7M	+9.3%	8.9M	+2.6%
Roses	\$121.2M	+13.2%	8.9M	+5.5%
Potted plants	\$115.3M	-0.5%	10.9M	-2.9%
Arrangements	\$93.5M	+11.3%	3.1M	+9.7%
Consumer bunch	\$79.5M	+5.0%	11.6M	+1.6%
Holiday bouquets	\$57.5M	+14.0%	2.4M	+8.9%
Outdoor plants	\$10.2M	+9.4%	1.2M	+7.1%
Bulbs	\$2.9M	-28.8%	0.6M	-24.3%

PRICING

Inflation Across Floral Segments

The average price per floral unit rose to \$10.98 in the latest four weeks, up \$1.30 from the prior quad-week and 5.9% higher than year-ago levels. All floral subcategories experienced year-over-year inflation, though price increases for arrangements were more modest than for other segments.

4 w.e. 11/30/2025	Price per unit	% Change vs. year ago
Floral departments	\$12.28	+5.9%
Bouquets	\$13.97	+6.5%
Roses	\$13.60	+7.3%
Potted plants	\$10.54	+2.5%
Arrangements	\$30.16	+1.4%
Consumer bunch	\$6.84	+3.3%
Holiday bouquets	\$23.72	+4.7%
Outdoor plants	\$8.35	+2.1%
Bulbs	\$4.98	-5.9%

Source: Circana, Integrated Fresh, MULO, 4 weeks ending 11/30/2025

REGIONAL REVIEW



Far-Ranging Performances by Region

While all regions posted year-over-year dollar sales growth in the quad-week period, the South Central had a standout performance, with year-over-year gains of 14.2%, followed by the Southeast, at +9.0%.

These two regions have seen an above-average performance all year.

4 w.e. 11/30/2025	Share of floral \$	Floral \$ sales growth vs. year ago
Total US	100.0%	+8.1%
California	14.9%	+4.7%
Great Lakes	11.3%	+4.7%
Mid-South	10.7%	+7.7%
Northeast	14.1%	+8.5%
Plains	5.8%	+8.6%
South Central	14.5%	+14.2%
Southeast	13.9%	+9.0%
West	14.8%	+7.7%

Source: Circana, Integrated Fresh, MULO, 4 weeks ending 11/30/2025

52 w.e. 11/30/2025	Share of floral \$	Floral \$ sales growth vs. year ago
Total US	100.0%	+5.7%
California	13.1%	+4.1%
Great Lakes	12.9%	+4.6%
Mid-South	11.2%	+5.6%
Northeast	13.9%	+6.6%
Plains	6.1%	+6.1%
South Central	14.4%	+8.3%
Southeast	13.1%	+7.7%
West	15.3%	+3.2%

Source: Circana, Integrated Fresh, MULO, 52 weeks ending 11/30/2025