

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

By: Anne-Marie Roerink | President, 210 Analytics

Four weeks ending 10/5/2025



All-Around Dollar Gains for Floral Categories in September

Floral sales continued to accelerate in the four weeks ending October 5, 2025. Growth was a combination of demand and inflation-driven gains. Roses and bouquets were instrumental in securing sales and growth.

PERFORMANCE

Retail Floral Sales in the Latest Four and 52 Weeks

Floral sales continued to accelerate going into September and October. Dollar sales reached \$622 million for the quad-week ending October 5, 2025, which was an increase of 9.3% compared with the same four weeks in 2024. Growth was a combination of inflation and higher demand, as illustrated by units. Unit sales grew 4.8% to reach 57 million.

In the 52-week view, sales exceed \$10 billion, up 4.8%, though units show some pressure, down 1.8%.

Floral department	Dollar sales	Dollar % change vs. year ago	Unit sales	Unit % change vs. year ago
4 weeks	\$621.5M	+9.3%	57.2M	+4.8%
52 weeks	\$10.1B	+4.8%	957.6M	-1.8%

Source: Circana, Integrated Fresh, MULO, 4 and 52 weeks ending 10/5/2025



"Impressively, the department's 4.8% unit growth was supported by gains across all floral types. Roses overtook bouquets as the number one seller in the quad-week period, demonstrating growing year-round demand."

-Colleen Fagundus, IFPA's Director of Floral

SALES BY TYPE

Strong unit gains for bouquets and arrangements

Roses and bouquets were the largest contributors to the total \$622 million in floral sales in the four weeks ending October 5. Following a few subdued weeks, roses resumed unit growth. Bouquets had the highest gains of 10.1% in units and 12.8% in dollars.

Holiday bouquets, a very small type, were the only ones to lose ground in the quad week. This could be a matter of availability rather than demand. In categories such as confectionery, retailers increasingly merchandise regular items during holiday periods, rather than developing holiday-specific packaging.

4 w.e 10/5/2025	Dollar sales	Dollar % change vs. year ago	Unit sales	Unit % change vs. year ago
Floral department	\$621.5M	+9.3%	57.2M	+4.8%
Roses	\$118.1M	+10.6%	8.4M	+3.1%
Bouquets	\$115.8M	+12.8%	8.8M	+10.1%
Outdoor plants	\$102.0M	+6.5%	11.6M	+4.0%
Consumer bunch	\$86.9M	+9.4%	12.9M	+5.5%
Arrangements	\$84.2M	+12.0%	2.7M	+8.0%
Potted plants	\$68.4M	+2.9%	6.2M	+0.9%
Bulbs	\$10.2M	+6.9%	1.2M	-0.7%
Holiday bouquets	\$0.7M	-13.6%	93K	-52.8%

PRICING

Inflation Across Floral Segments

The price per unit during the latest four weeks averaged \$10.87, which was \$0.14 more than the average price during the last quad week and up 4.3% from last year. Most subcategories experienced inflation on a year-over-year basis. Price increases for bouquets were on the lower end.

4 w.e. 10/5/2025	Price per unit	% Change vs. year ago
Floral department	\$10.87	+4.3%
Roses	\$14.07	+7.3%
Bouquets	\$13.13	+2.5%
Outdoor plants	\$8.81	+2.4%
Consumer bunch	\$6.73	+3.8%
Arrangements	\$30.89	+3.7%
Potted plants	\$11.03	+2.0%
Bulbs	\$8.53	+7.7%
Holiday bouquets	\$7.31	+82.9%

Source: Circana, Integrated Fresh, MULO, 4 weeks ending 10/5/2025

REGIONAL REVIEW



Far-Ranging Performances by Region

All regions experienced dollar sales growth in the quad week. In fact, dollar growth exceeded the rate of inflation in all regions, signaling demand growth.

In the 52-week view, the South Central continued to have the highest dollar growth rate, at +7.0%. Others with above-average growth include the Northeast, Plains and the Southeast.

4 w.e. 10/5/2025	Share of floral \$	Floral \$ sales growth vs. year ago
Total US	100.0%	+9.3%
California	12.8%	+5.8%
Great Lakes	12.9%	+6.1%
Mid-South	11.5%	+9.9%
Northeast	14.9%	+8.9%
Plains	6.2%	+8.6%
South Central	15.0%	+12.8%
Southeast	13.0%	+16.6%
West	100.0%	+9.3%

52 w.e. 10/5/2025	Share of floral \$	Floral \$ sales growth vs. year ago
Total US	100.0%	+4.8%
California	13.1%	+3.4%
Great Lakes	13.0%	+4.2%
Mid-South	11.2%	+4.9%
Northeast	13.9%	+5.7%
Plains	6.1%	+5.5%
South Central	14.4%	+7.0%
Southeast	13.1%	+6.2%
West	15.3%	+2.4%

Source: Circana, Integrated Fresh, MULO, 4 weeks ending 10/5/2025

Source: Circana, Integrated Fresh, MULO, 52 weeks ending 10/5/2025