

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

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Four weeks ending 2/22/2026

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## Soft Valentine's Day Unit Sales in 2026

*Between low consumer confidence and ongoing inflation, floral unit sales declined in the four-week Valentine's Day period. The Saturday holiday timing likely played a role as well, which is an important reminder with Super Bowl and Valentine's Day overlapping in 2027.*

## PERFORMANCE

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

Sales during the four weeks ending February 22 nearly doubled from the prior quad-week period due to Valentine's Day. However, while dollar sales advanced 0.9%, unit sales were off substantially, at -3.3%. Importantly, Valentine's Day and Super Bowl will overlap in 2027, which may substantially alter typical routines for both holidays, though one is focused on gifting and the other on entertaining.

In the full year view, this resulted in units sliding back behind year ago levels, albeit by a mere 0.3%. Dollar sales did grow during the latest 52 weeks, at +5.9%.

Floral department	Dollar sales	Dollar % change vs. year ago	Unit sales	Unit % change vs. year ago
4 weeks	\$1.29B	+0.9%	91.9M	-3.3%
52 weeks	\$10.3B	+5.9%	963.1M	-0.3%

Source: Circana, Integrated Fresh, MULO, 4 and 52 weeks ending 2/22/2026



"The Valentine's Day results are a bit disappointing, from a year-on-year growth perspective. However, weekend timing typically leads to some pressure as more consumers engage in dining out, trips and other experience-focused activities."

-Colleen Fagundus, IFPA's Director of Floral

## SALES BY TYPE

### True to Valentine's Day traditions, roses rise to the top in February

Roses generated nearly \$424 million in the four weeks leading up the Valentine's Day holiday. This reflects a dollar gain of 2.6%, though unit decline of 1.8%. Only arrangements had positive unit growth among the larger sellers during the quad-week, with roses being second best.

Potted plants, which includes Easter lilies had substantial declines because of this year's later Easter timing.

4 weeks	Dollar sales	Dollar % change vs. year ago	Unit sales	Unit % change vs. year ago
<b>Floral department</b>	<b>\$1.29B</b>	<b>+0.9%</b>	<b>91.9M</b>	<b>-3.3%</b>
Roses	\$423.8M	+2.6%	24.0M	-1.8%
Arrangements	\$258.4M	+1.7%	7.3M	+1.5%
Bouquets	\$245.0M	+2.2%	15.4M	-2.4%
Potted plants	\$136.7M	-5.6%	11.1M	-9.5%
Consumer bunches	\$116.7M	+1.3%	15.7M	-4.6%
Bulbs	\$19.7M	-7.9%	2.0M	-22.3%
Outdoor plants	\$14.1M	-7.2%	1.6M	-8.0%
Holidays	\$2.1M	+48.1%	0.3M	+30.8%

## PRICING

### Inflation Across Floral Segments

The average price per unit was substantially higher than during typical weeks. This is driven by the larger share of sales coming from roses and arrangements. Roses averaged \$17.69 per unit and arrangements averaged \$35.53.

4 w.e. 12/28/2025	Price per unit	% Change vs. year ago
<b>Floral department</b>	\$14.04	4.3%
Roses	\$17.69	4.5%
Arrangements	\$35.53	0.3%
Bouquets	\$15.81	4.7%
Potted plants	\$12.28	4.4%
Consumer bunches	\$7.44	6.2%
Bulbs	\$9.80	18.5%
Outdoor plants	\$8.60	0.8%
Holidays	\$7.68	13.2%

Source: Circana, Integrated Fresh, MULO, 4 weeks ending 2/22/2026

## REGIONAL REVIEW



### Far-Ranging Performances by Region

Geographically, the four-week holiday performance was a true mix, with four regions being up compared to the same time period last year and four regions being down. The West had the best year-over-year performance.

This is unlike the 52-week view, where the South Central and Southeast have the highest growth rates.

Four weeks	Share of floral \$	Floral \$ sales growth vs. year ago
<b>Total US</b>	<b>100.0%</b>	<b>+0.9%</b>
California	13.5%	-1.7%
Great Lakes	11.3%	1.7%
Mid-South	11.3%	-3.1%
Northeast	12.4%	+2.3%
Plains	5.3%	+1.8%
South Central	17.0%	+2.7%
Southeast	14.6%	-1.2%
West	14.5%	+4.4%

Source: Circana, Integrated Fresh, MULO, 4 weeks ending 2/22/2026

52 weeks	Share of floral \$	Floral \$ sales growth vs. year ago
<b>Total US</b>	<b>100.0%</b>	<b>+5.9%</b>
California	13.0%	+3.3%
Great Lakes	12.9%	+4.8%
Mid-South	11.1%	+5.3%
Northeast	13.9%	+6.9%
Plains	6.1%	+6.3%
South Central	14.6%	+9.1%
Southeast	13.1%	+7.1%
West	15.3%	+4.3%

Source: Circana, Integrated Fresh, MULO, 52 weeks ending 2/22/2026