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

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Four weeks ending 1/28/2024

January Shows Some Softness in Floral Sales

After several very strong months during the winter holiday season, the four weeks ending January 28th showed some softness. Everyday sales patterns did not reflect the same same strong demand as seen during holiday weeks.

UPGRADED MARKET COVERAGE

Circana Market Expansion to MULO+

Until the December 2023, this report series reflected the Multi-Outlet (MULO) marketplace, which comprised of mass/supercenters, grocery stores, military and more.

This month, the report reflects an expanded market view, called MULO+. This universe includes additional retailers that previously did not share data nor were projected in the data.

This new geography will be used going forward for the monthly updates. The additional retailers represent e-Commerce, grocery, club, DTC delivery and other channels, fueling an average expansion of 15% across total CPG. All time period history and geographies have been updated to MULO+.

IMPRESSIVE GROWTH

The Results for the Weeks ending January 28th 2024

January saw a reversal of several very strong quad-week periods for the floral department. While at -1.4% in dollars and -4.0% in units, sales were only slightly behind those of the rest of the store, floral had been gaining in both dollars and unit sales in the fourth quarter of 2024.

The four week sales, that were far less than those seen during the November and December months, totaled $387 million. When looking across the 52 weeks ending January 28th, sales were just under $9 billion, still up in dollars and flat in units.

Floral department	Dollar sales	Dollar % change vs. year ago	Unit sales	Unit % change vs. year ago
4 weeks	$386.6M	-1.4%	37.6M	-4.0%
52 weeks	$8.9B	+5.7%	886.6M	+0.0%

Because January is one of the smaller quad weeks in terms of dollar and unit sales, it had little impact on the 52-week performance. Annual floral department unit sales, reflecting the number of flower arrangements and plants sold, totaled 887 million in Circana’s MULO+ universe.

Source: Circana, Integrated Fresh, MULO, 4 and 52 weeks ending 1/28/2024

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SALES BY TYPE

A Mixed Performance for Floral Department Sales

The January floral performance had areas of strength, such as arrangements, bouquets and roses, but also areas of substantial decline, including potted and outdoor plants. While smaller sellers, these pulled down the overall average into the negative for the four-week period.

Roses were the largest seller, at a little over $87 million, followed by bouquets and potted plants.

4 w.e 1/28/2024	Dollar sales	Dollar % change vs. year ago	Unit sales	Unit % change vs. year ago
Floral department	$386.6M	-1.4%	37.6M	-4.0%
Rose	$87.4M	+4.1%	7.0M	+0.6%
Bouquet	$76.4M	+5.9%	6.3M	+3.9%
Potted plants	$65.4M	-16.3%	6.2M	-16.9%
Consumer bunch	$59.1M	-0.7%	9.2M	-1.1%
Arrangement	$57.7M	+2.3%	1.9M	+1.4%
Outdoor plants	$6.1M	-17.2%	744K	-23.0%
Bulb	$3.8M	-21.0%	638K	-16.3%
Holiday	$2.2M	+97.3%	295K	+92.3%

Source: Circana, Integrated Fresh, MULO, 4 weeks ending 1/28/2024

PRICING

Mild Inflation for Floral

After a few months of prices being unchanged versus their year-ago levels, January did see some mild inflation. The average price per unit was $10.29 during the four January weeks, which was up 2.7% versus year ago. This was driven by roes and outdoor plants.

4 w.e. 1/28/2024	Price per unit	% Change vs. year ago
Floral department	**$10.29**	**+2.7%**
Rose	$12.50	+3.5%
Bouquet	$12.22	+1.9%
Potted plants	$10.48	+0.7%
Consumer bunch	$6.41	+0.4%
Arrangement	$30.94	+0.9%
Outdoor plants	$8.21	+7.5%
Bulb	$5.95	-5.6%
Holiday	$7.32	+2.6%

Source: Circana, Integrated Fresh, MULO, 4 weeks ending 1/28/2024

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REGIONAL REVIEW

Only two regions achieved gains in January

Whereas in the fourth quarter of 2023 all regions contributed to dollar gains, January only saw year-over-year growth for the South Central and Southeast regions.

These have been above-average performers throughout the last 52 weeks.

4 w.e. 1/28/2024	Share of floral $	Floral $ sales growth vs. year ago
Total US	**100.0%**	**-1.4%**
California	16.9%	-2.9%
Great Lakes	10.2%	-3.4%
Mid-South	10.3%	-2.6%
Northeast	11.4%	-2.2%
Plains	4.6%	-10.9%
South Central	15.9%	+4.6%
Southeast	15.2%	+1.7%
West	15.6%	-2.7%

Source: Circana, Integrated Fresh, MULO, 4 weeks ending 1/28/2024

52 w.e. 1/28/2024	Share of floral $	Floral $ sales growth vs. year ago
Total US	**100.0%**	**+5.1%**
California	13.4%	+1.3%
Great Lakes	12.9%	+3.9%
Mid-South	11.2%	+5.3%
Northeast	13.8%	+3.7%
Plains	6.0%	+2.3%
South Central	14.3%	+13.6%
Southeast	12.9%	+7.4%
West	15.7%	+2.6%

Source: Circana, Integrated Fresh, MULO, 52 weeks ending 1/28/2024