



# Floral Units Held While Dollars Grew in August 2023

August 2023

According to the latest Circana (formerly IRI) results, the floral department continued to be an above-average performer in the four and 52 weeks ending mid-August in comparison to the same set of weeks last year. The four weeks ending August 13th showed a 6.3% improvement in dollar sales over year-ago levels. Unit sales were flat, which was the exception not the rule in a marketplace in which consumers are buying less in order to balance their budgets. Floral sales declined 3.2% in the 52-week period – underscoring the gradual improvement seen all year.

Floral department	Dollar sales	Dollar % change vs. YA	Unit sales	Unit % change vs. YA
4 weeks ending 8/13/2023	\$394.8M	+6.3%	41.8M	-0.2%
52 weeks ending 8/13/2023	\$7.8B	+2.9%	818.1M	-3.2%

Source: Circana, Integrated Fresh, MULO, 4 weeks ending 8/13/2023

Sales during the 52 weeks ending 8/13/2023 were up 2.9% in dollars. The very different unit and dollar growth performance shows the impact inflation has had on floral department sales.

## Sales by Type

At the category level, performances were mixed with strong growth for bouquets and roses in both dollars and units, whereas outdoor plants continued to struggle. Consumer/custom bunches experienced mild dollar declines as inflation was unable to offset the pullback in units.



4 w.e 8/13/2023	Dollar sales	Dollar % change vs. YA	Unit sales	Unit % change vs. YA
<b>Floral department</b>	<b>\$394.8M</b>	<b>+6.3%</b>	<b>41.8M</b>	<b>-0.2%</b>
Roses	\$89.8M	+10.4%	8.4M	+5.2%
Bouquets	\$77.8M	+13.4%	6.5M	+11.9%
Consumer bunches	\$60.6M	-2.1%	9.9M	-5.7%
Potted plants	\$59.2M	+2.1%	6.3M	+2.1%
Arrangements	\$55.8M	+17.3%	1.8M	+8.8%
Outdoor plants	\$26.3M	-10.1%	4.1M	-17.9%
Bulbs	\$487K	-15.9%	306K	-8.0%
Holiday	\$291K	+7.2%	42K	+0.2%

Source: Circana, Integrated Fresh, MULO, 4 weeks ending 8/13/2023

### Regional Performance

Both the share of sales and the contributions to new dollars was vastly different across the nine Circana regions. The West, South Central and California are the biggest regions for sales. However, dollar sales declined in California and rose only 1.3% in the West. Instead, the South Central and Southeast had double digit growth performances when comparing the four weeks ending mid-August to the same four weeks in 2022. This shows the importance of looking at performance at a more granular level.



4 w.e. 8/13/2023	Share of floral \$	Floral \$ sales growth vs. year ago
<b>Total US</b>	<b>100.0%</b>	<b>+6.3%</b>
California	14.4%	-1.3%
Great Lakes	12.8%	+5.1%
Mid-South	10.7%	+6.8%
Northeast	12.7%	+4.6%
Plains	5.4%	+2.1%
South Central	14.8%	+22.0%
Southeast	13.6%	+10.0%
West	15.7%	+1.3%

Source: Circana, Integrated Fresh, MULO, 4 weeks ending 7/16/2023



## Pricing

During the four weeks ending August 13th compared to the same time period last year, the average price per unit for floral increased by 6.4%. This is far less than the increases seen year-to-date. The average price per unit stood at \$9.45, with above average costs for bouquets, roses and arrangements. Only one area came down in price compared to the same four weeks in 2022, being bulbs – a small seller.

4 w.e. 8/13/2023	ACV weighted distribution	Change vs. YA (points)
<b>Floral department</b>	<b>\$9.45</b>	<b>+6.4%</b>
Roses	\$10.73	+4.9%
Bouquets	\$11.90	+1.3%
Consumer bunches	\$6.14	+3.8%
Potted plants	\$9.34	0.0%
Arrangements	\$30.50	+7.8%
Outdoor plants	\$6.43	+9.4%
Bulbs	\$1.59	-8.7%
Holiday	\$6.98	+7.0%

Source: Circana, Integrated Fresh, MULO, 4 weeks ending 8/13/2023

