



Floral Remains an Above-Average Performer at the Start of Fall

September 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-September in comparison to the same set of weeks last year. The four weeks ending September 10th showed a 4.1% improvement in dollar sales over year-ago levels. Unit sales were down by a little over 1% – better than the results seen in total food and beverages. The marketplace reflects stubborn buying patterns focused on reducing quantity in order to balance budgets. Floral dollar sales increased 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 9/10/2023	\$416.4M	+4.1%	43.8M	-1.4%
52 weeks ending 9/10/2023	\$7.9B	+3.2%	817.8M	-2.6%

Source: Circana, Integrated Fresh, MULO, 4 weeks ending 9/10/2023

Sales during the 52 weeks ending 9/10/2023 were down 2.6% 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 arrangements 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 9/10/2023	Dollar sales	Dollar % change vs. YA	Unit sales	Unit % change vs. YA
Floral department	\$416.4M	+4.1%	43.8M	-1.4%
Roses	\$88.2M	+7.0%	8.0M	+1.8%
Bouquets	\$82.8M	+15.0%	6.9M	+14.1%
Consumer bunches	\$62.5M	-3.3%	10.1M	-7.9%
Arrangements	\$60.7M	+16.4%	1.9M	+7.1%
Potted plants	\$58.1M	-2.9%	6.0M	-2.5%
Outdoor plants	\$36.3M	-13.2%	5.7M	-14.0%
Bulbs	\$2.3M	+12.3%	531K	+1.5%
Holiday	\$356K	-4.9%	51.4K	-11.4%

Source: Circana, Integrated Fresh, MULO, 4 weeks ending 9/10/2023

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 0.4% in the West. Instead, the South Central had double-digit growth when comparing the four weeks ending mid-September to the same four weeks in 2022. This shows the importance of looking at performance at a more granular level.



4 w.e. 9/10/2023	Share of floral \$	Floral \$ sales growth vs. year ago
Total US	100.0%	+4.1%
California	13.8%	-0.3%
Great Lakes	13.1%	+1.2%
Mid-South	10.9%	+2.5%
Northeast	13.2%	+1.4%
Plains	5.8%	-0.1%
South Central	15.1%	+19.5%
Southeast	13.3%	+6.7%
West	14.8%	+0.4%

Source: Circana, Integrated Fresh, MULO, 4 weeks ending 9/10/2023



Pricing

During the four weeks ending September 10th compared to the same time period last year, the average price per unit for floral increased by 5.6%. This is far less than the increases seen year-to-date. The average price per unit stood at \$9.52, 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 potted plants.

4 w.e. 9/10/2023	ACV weighted distribution	Change vs. YA (points)
Floral department	\$9.52	+5.6%
Roses	\$10.98	+5.1%
Bouquets	\$12.07	+0.8%
Consumer bunches	\$6.19	+5.0%
Arrangements	\$31.43	+8.7%
Potted plants	\$9.63	-0.5%
Outdoor plants	\$6.38	+1.0%
Bulbs	\$4.32	+10.6%
Holiday	\$6.93	+7.3%

Source: Circana, Integrated Fresh, MULO, 4 weeks ending 9/10/2023

