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Future of Floral is Fact-Based

The Power of Shopper Insights in the Floral Industry

October 2026 | For public use

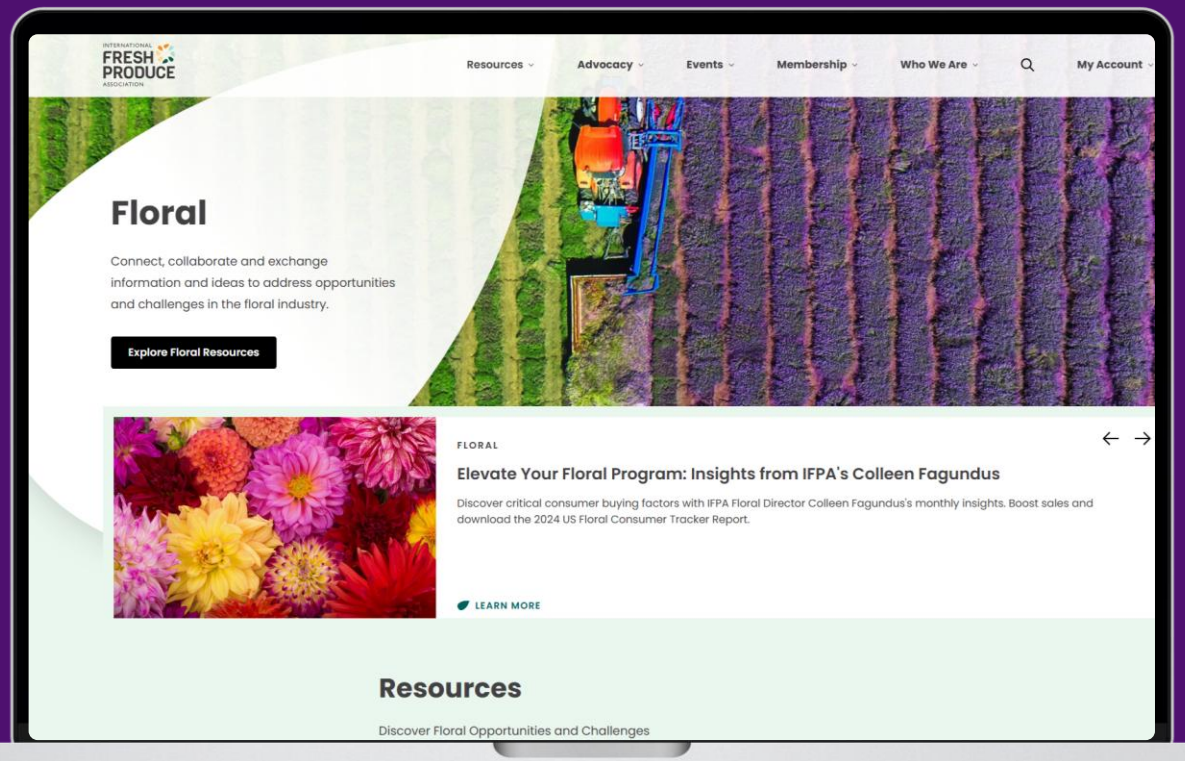


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Circana & IFPA

Leverage sales and shopper insights for the US Floral Industry powered by Circana!

Located on the IFPA Website: Floral Resources



Don't Miss our Quarterly Webinar Series

December 2nd

Scan to learn more

What is Point of Sale / Market Measurement Data?

Core Service



Collect

Direct feed of items scanned through a register from retailers & all item code types…



Organize

…which is then stored, organized and processed



Integrate

…and made actionable & accessible leveraging Circana proprietary technology and data science



Deliver

…to deliver actionable and growth focused insights, prescriptive analytics, and strategic consulting



Insights & Actions

…leading clients to make fact-based decision based on measured market performance beyond their “walls”

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What is in Circana's Market Measurement Data?

Breadth

- MULO+ unparalleled **93%** item/store/week POS coverage
- **7,000+ available geographies** from channel totals to local retail banners
- **A revolutionary approach** to custom product hierarchy and attribute management process

Depth

- **1,100+** product **attributes** across **8.7MM items**
- **Integration of Fresh/Perimeter** Departments down to item level including non-UPC/RW
- **5+ Years** of history down to weekly level

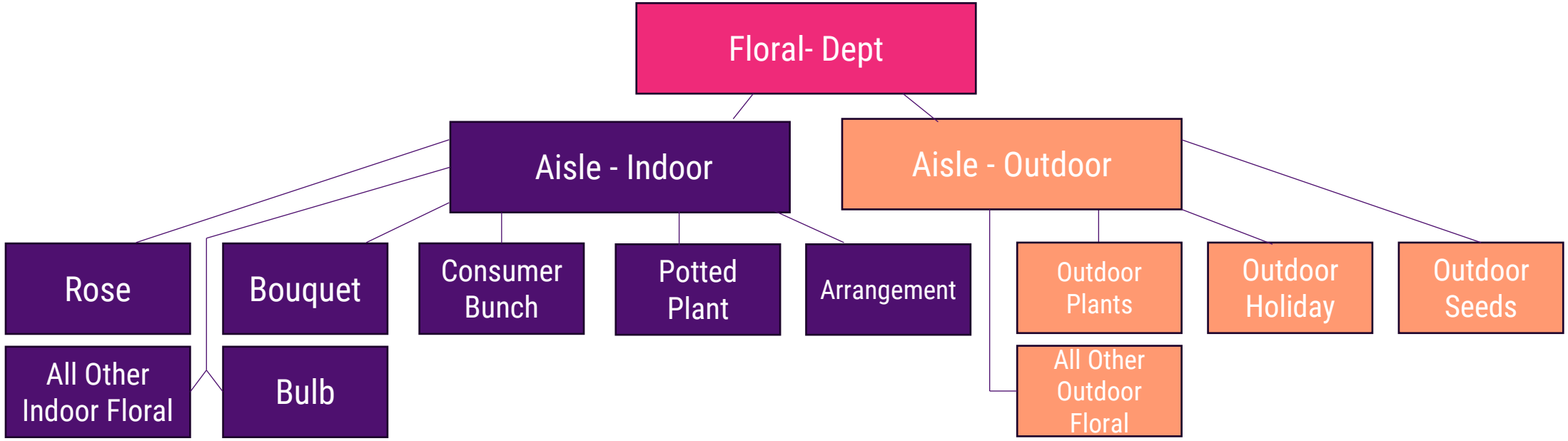
Measures

- **100s of** measures including robust sales, share, velocity measures
- Full **causals** including price reduction, feature, display
- Export tables or use guided business-issue based stories to drive **insights-to-action**

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Circana Floral Department Hierarchy

Aligned to the IFPA Floral Council Standards – developed in partnership with IFPA

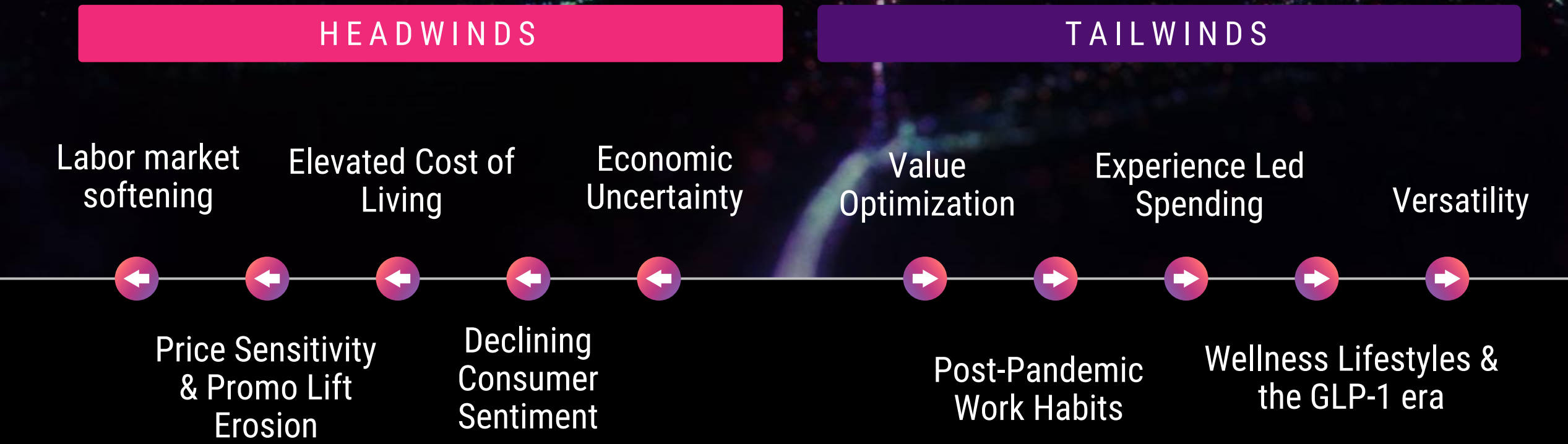


Additional attributes and item-level detail also available

Source: Circana Integrated Fresh POS and Shopper Loyalty Panel hierarchy

Headwinds and Tailwinds

Consumers are responding to economic uncertainty with more intentional choices, prioritizing value, convenience, and flexibility while maintaining a focus on everyday health and wellness. As routines continue to evolve—from hybrid work to shifting health priorities—food and beverage decisions are increasingly centered on practical, versatile solutions that fit seamlessly into daily life.



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In An Era of Big Data These Metrics That Matter:

RETAIL COMPETITIVE LANDSCAPE
Omnimarket Share
Pattern Shifting

SALES PERFORMANCE
Demand & Competition
Promotional Impact / Lift

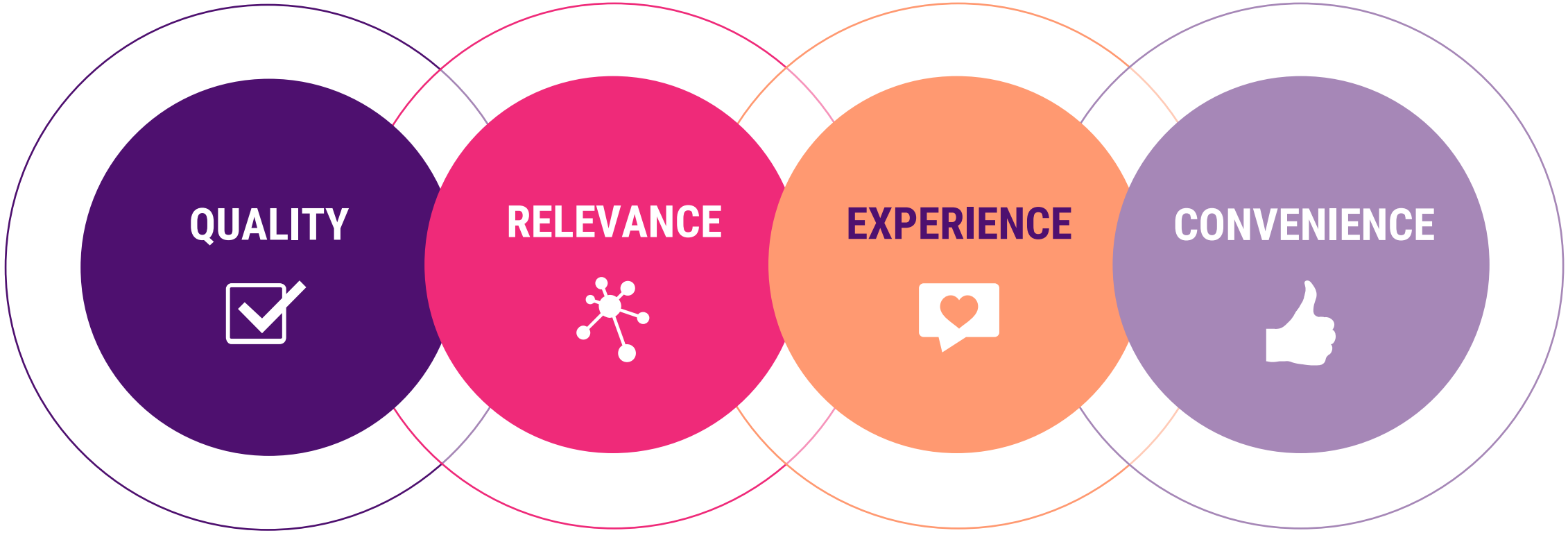


SHOPPER ENGAGEMENT
Growth Drivers
Reach & Frequency

MEETING MOMENTS
Occasions
Motivations
Who & How

Value in What We Buy is More Than Price

More than ever, driving demand must be multi-dimensional and anchored in consumer priorities



Source: FMI Dimensions of Value

Today's consumers are

HIGHLY ADAPTABLE & INCREASINGLY INTENTIONAL

Market is fundamentally different:

- More and different ways to **EAT**
- More and different ways to **BUY**
- More and different **LIFE EXPERIENCES**



Source: Quote from Stuart Aiken, Circana CEO, Feb 2026 Circana Unpacked Podcast

Consumer Combatting Inflation- **Just in Time** Shopping Patterns Continue

All Food & Beverages, including Fresh Produce & Floral

Avg Price Paid per Unit

$4.13

Up 4% vs 2YA

Product Trips per Buyer

224 annually

Up 6% vs 2YA

In Basket Dollars per Trip

$53.42

Flat vs 2YA

Source: Total Edible, Circana Integrated Fresh Scan Panel, 52 weeks ending 7/12/26

Young shoppers are

2x

more likely to shop for groceries online



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Source: Circana 2026

Why escapism is a key consumer impulse



1 BILLION

According to the World Health Organisation over 1B people are suffering from some form of **mental health disorder.** They are **exhausted** by the boring and ordinary as well as **worried** about war, economic challenges, climate change, security…

61%

of consumers want brands to give them **intense emotions** with their marketing & products

The joy economy

The opportunity to deliver **affordable fun & joy** across the retail spectrum

83% "I actively seek out experiences that bring me **joy & happiness**"

Source: Wunderman Thompson, The Age of Re-Enchantment

Floral

Retail & Food Service Performance





03

Floral Plays Vital Roles in U.S. Retail

Setting the stage for a great shopping experience – in-store and online – now more than ever

BASKET BUILDER



CREATE ESCAPES & CONNECTIONS



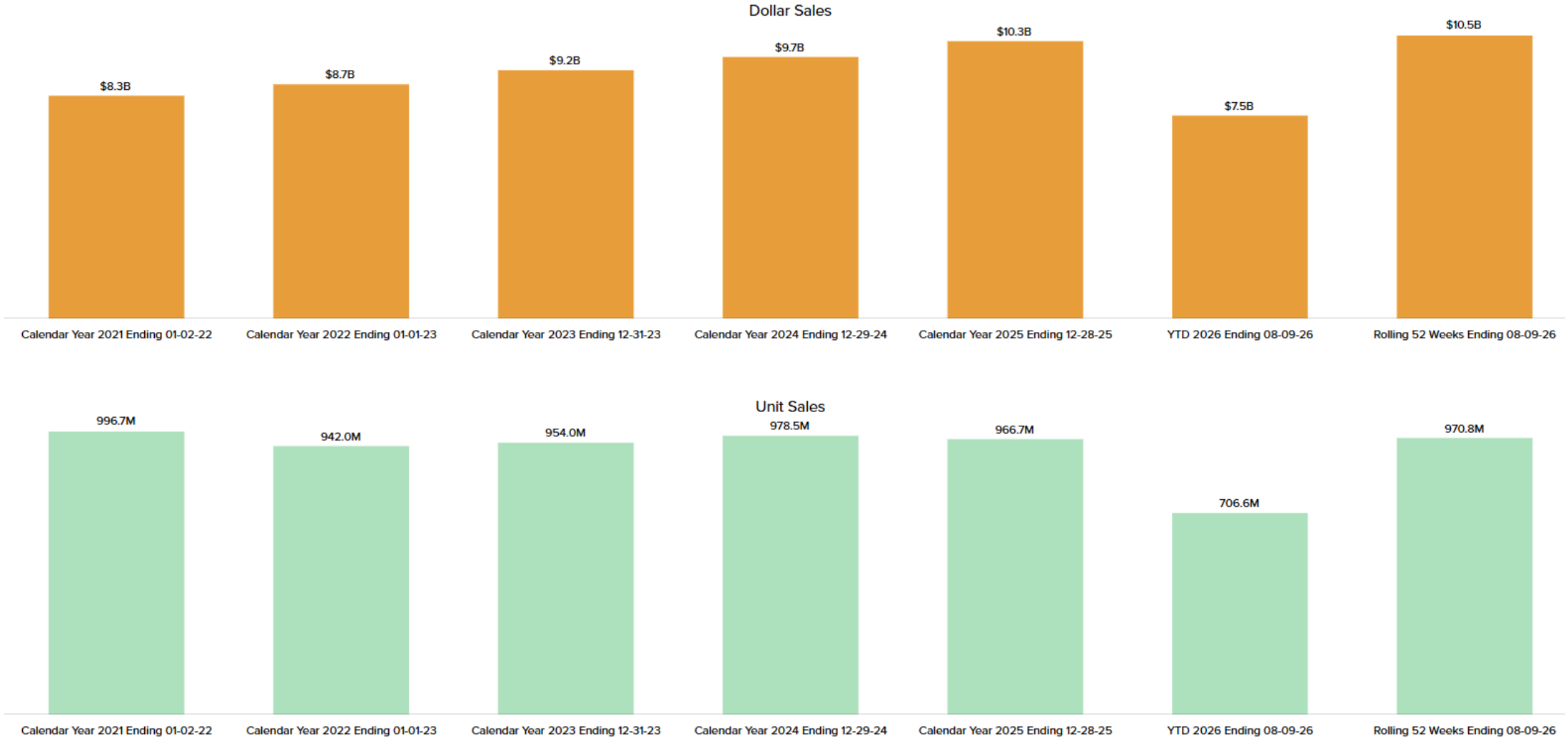
CELEBRATION SHOWROOM & SOLUTION



DIFFERENCE MAKER for CART-STOPPING SHOPPING

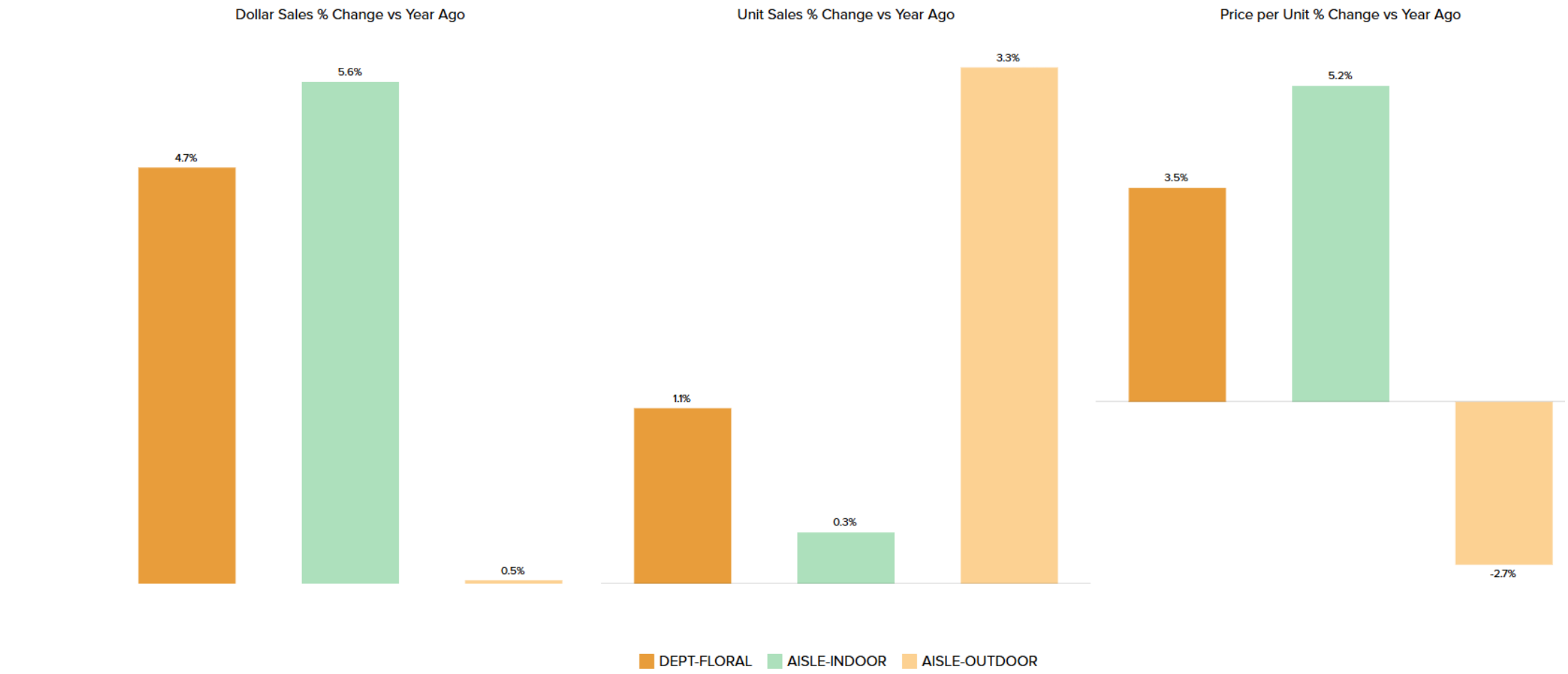


Floral is $10.5B in US Retail, growing 28% in dollars while units have fell -3% vs 2021



Source: Circana Integrated Fresh Market Advantage, Total US MULO+ , Latest 52 W/E 8/09/2026

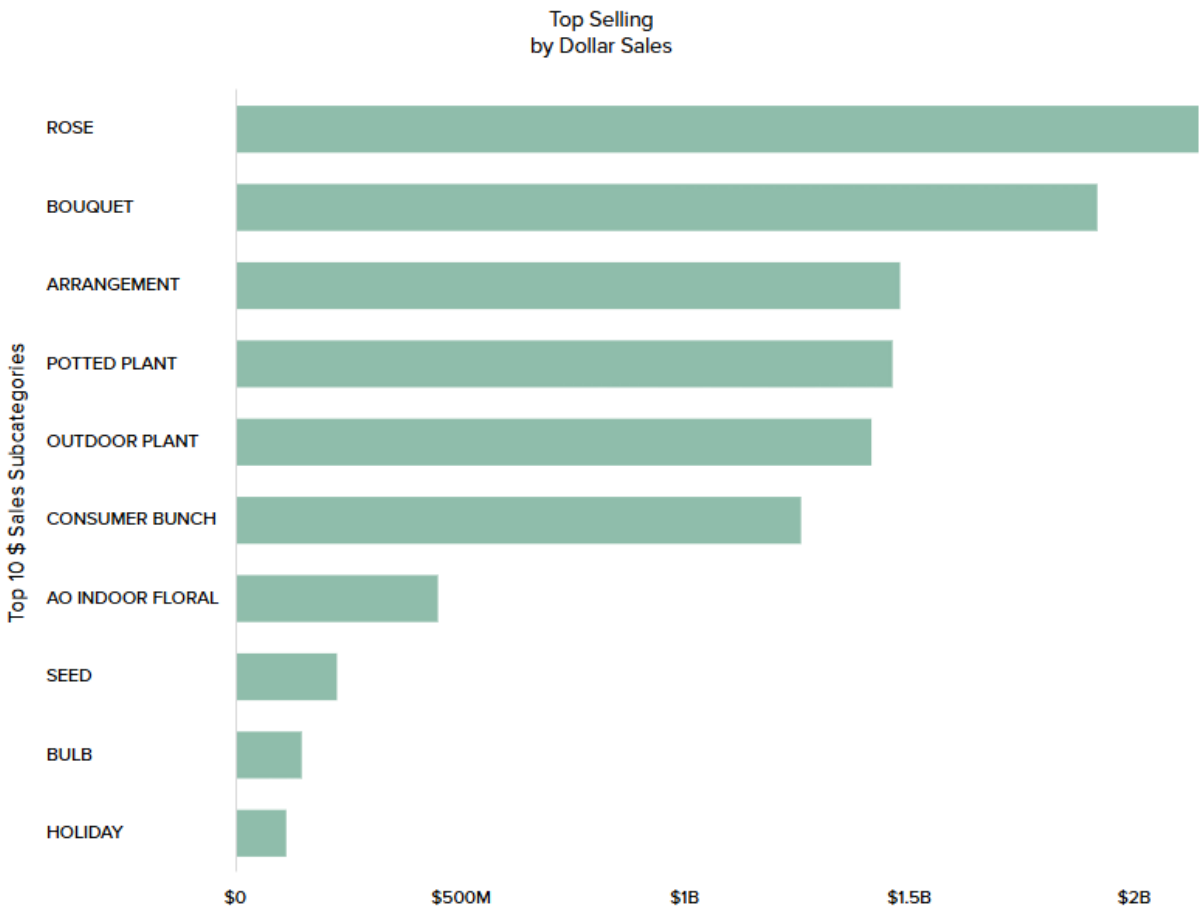
In the latest 52wks, Floral see 4.7% growth in dollars & 1.1% growth in units. Outdoor leads in unit growth while Indoor dollar growth benefits from price increases

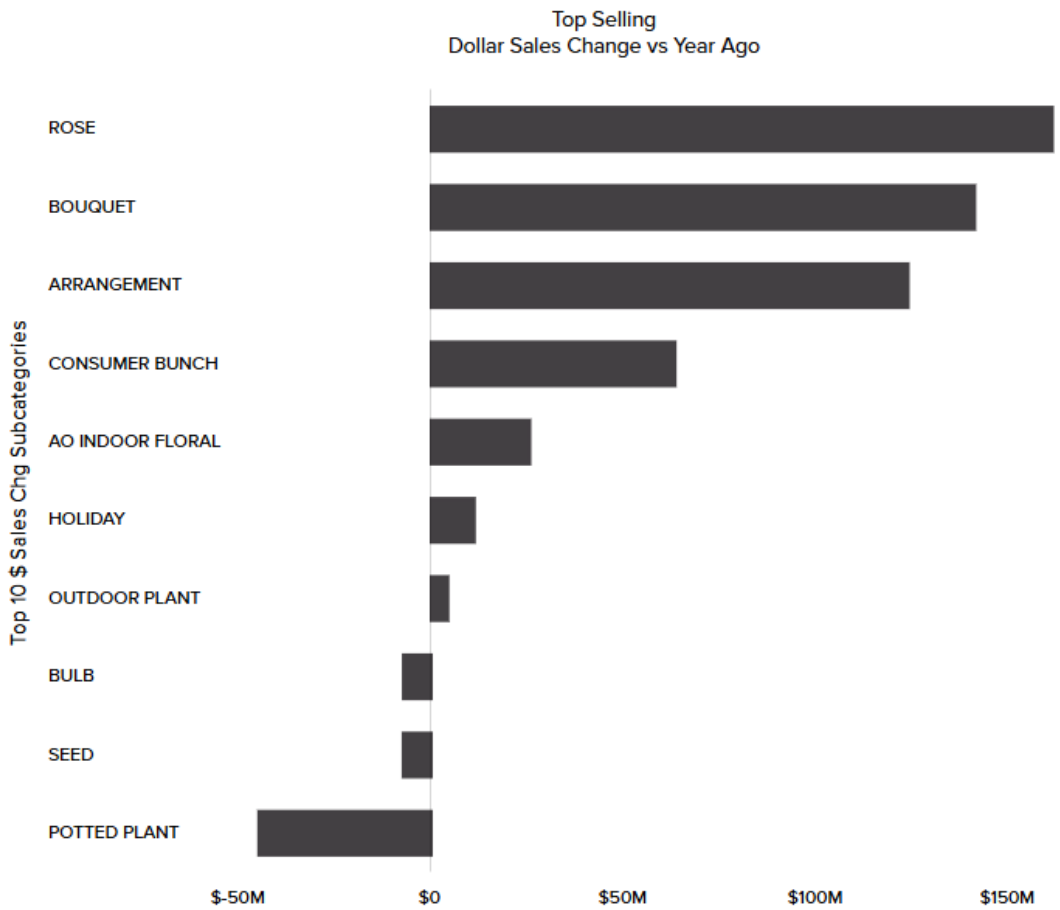


Source: Circana Integrated Fresh Market Advantage, MULO+ , Latest 52 W/E 8/09/2026c

Floral Top Subcat Dollar Sales Performance

Rolling 52 Weeks Ending 08-09-26 | Dollar Sales

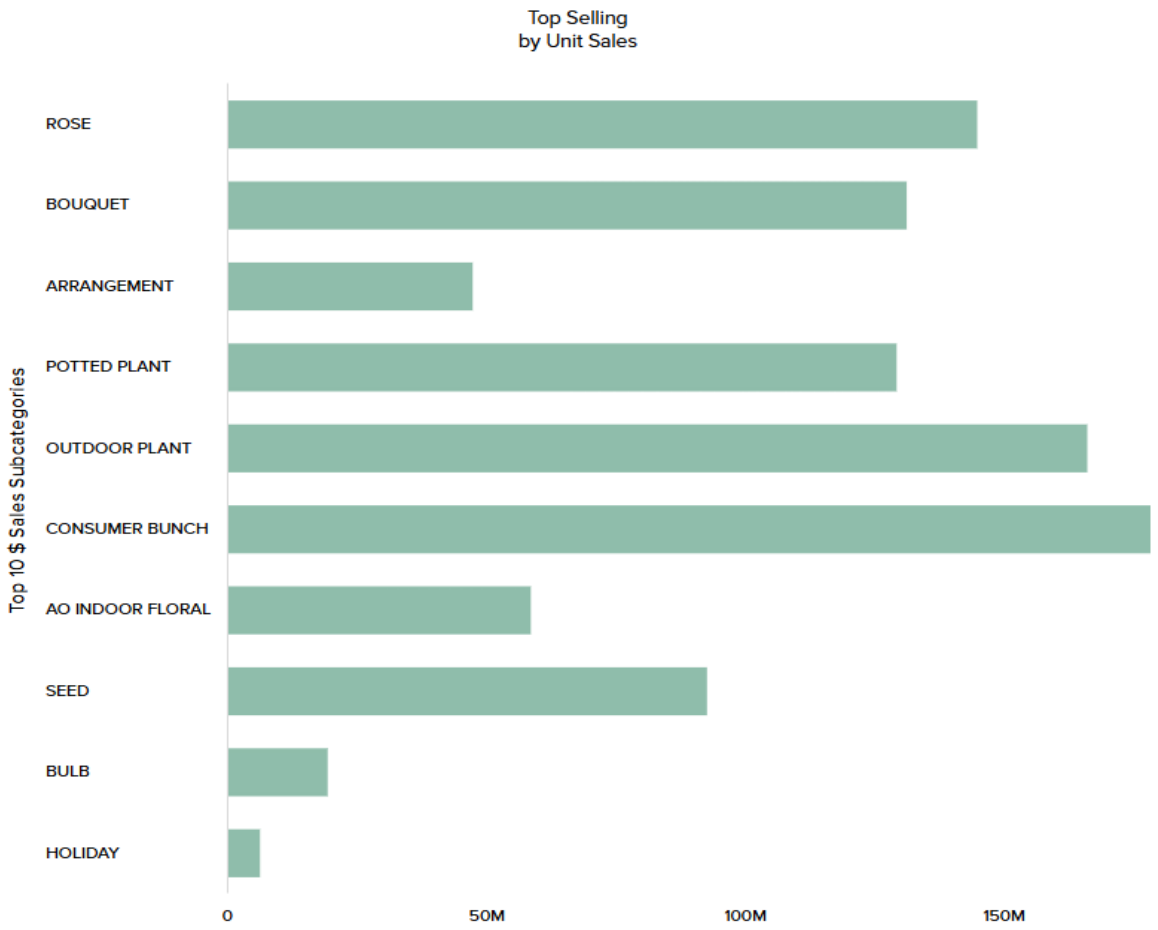


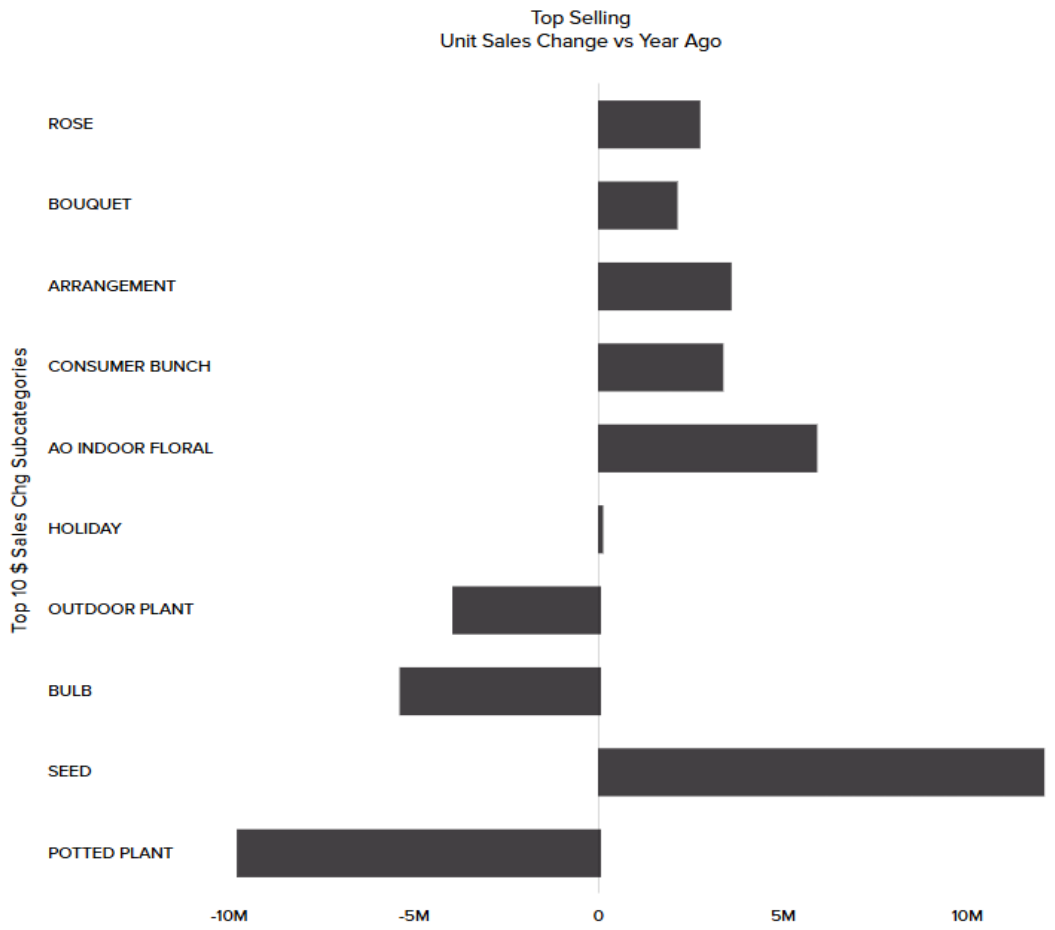


Source: Circana Integrated Fresh POS, Total US MULO+, 52 weeks ending 08-09-26

Floral Top Subcat Unit Sales Performance

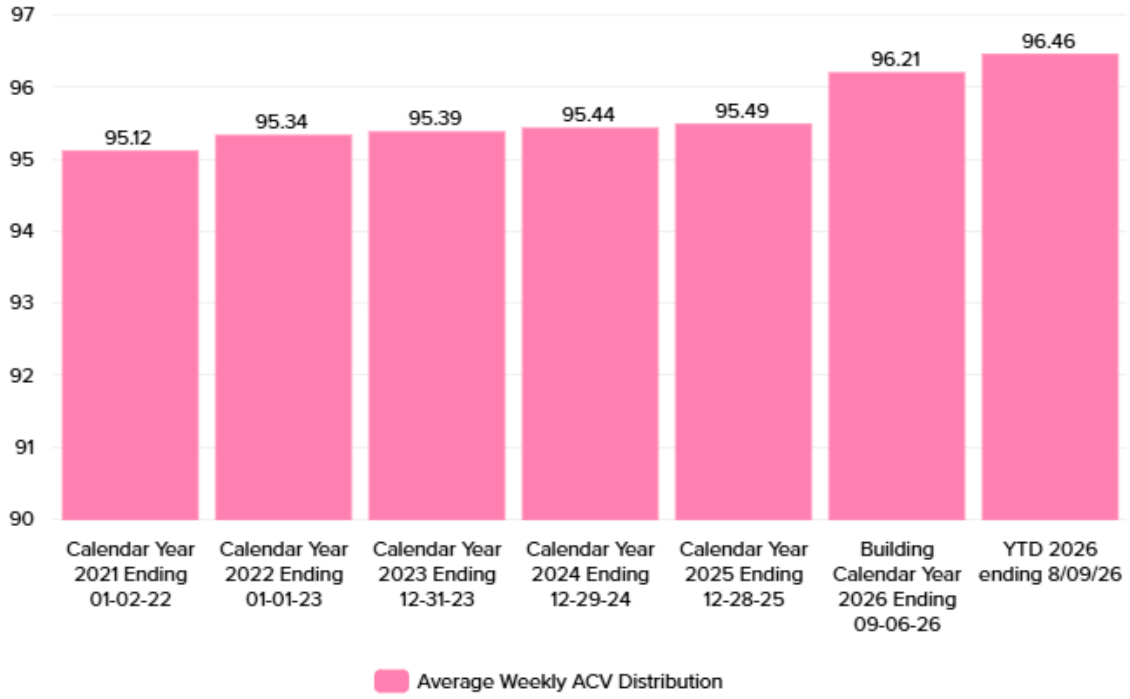
Rolling 52 Weeks Ending 08-09-26 | Unit Sales

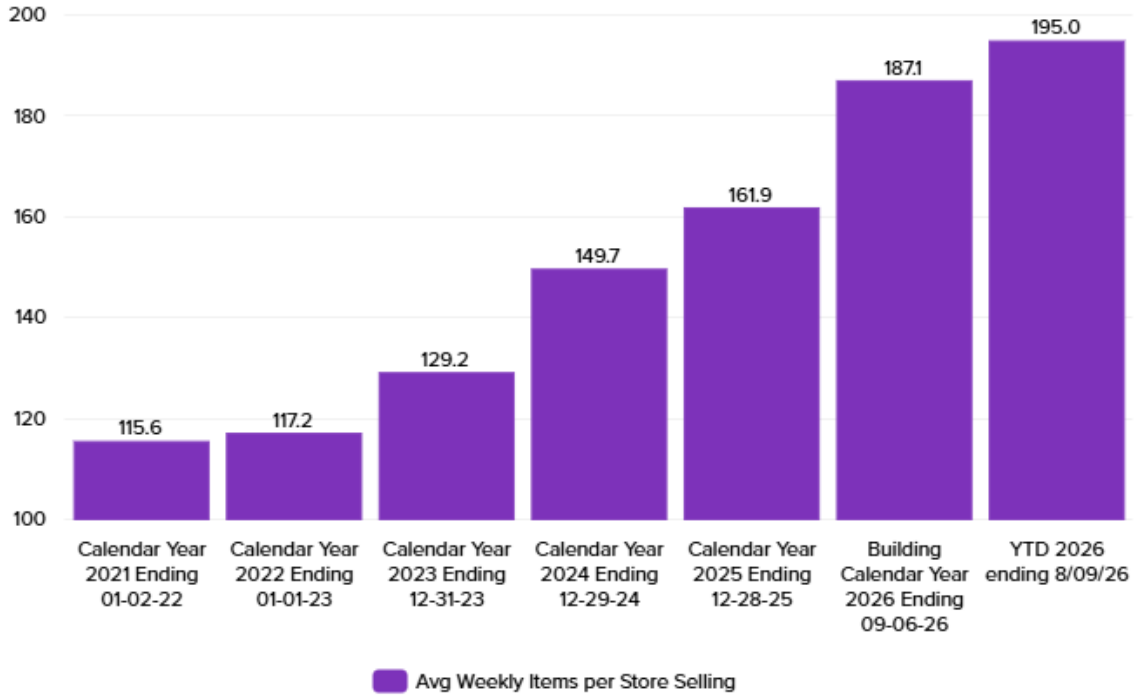




Source: Circana Integrated Fresh POS, Total US MULO+, 52 weeks ending 08-09-26

Total Floral sees constant growth across distribution and velocity

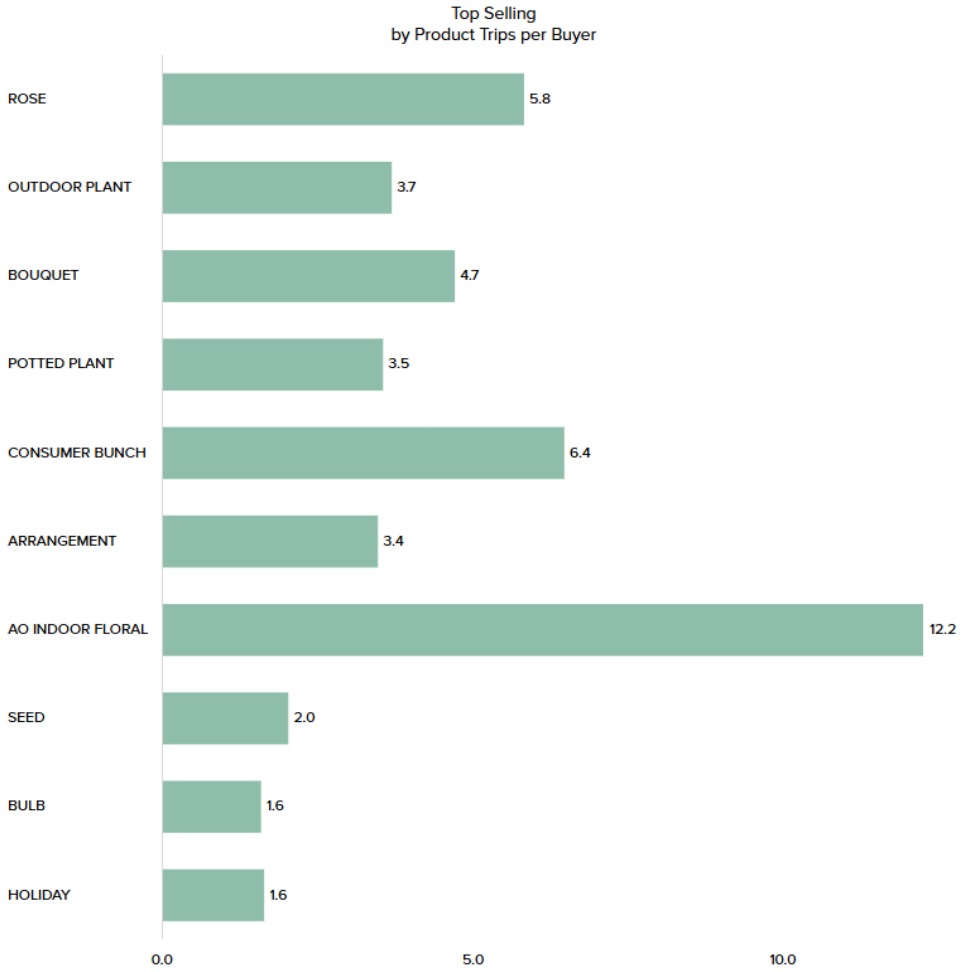


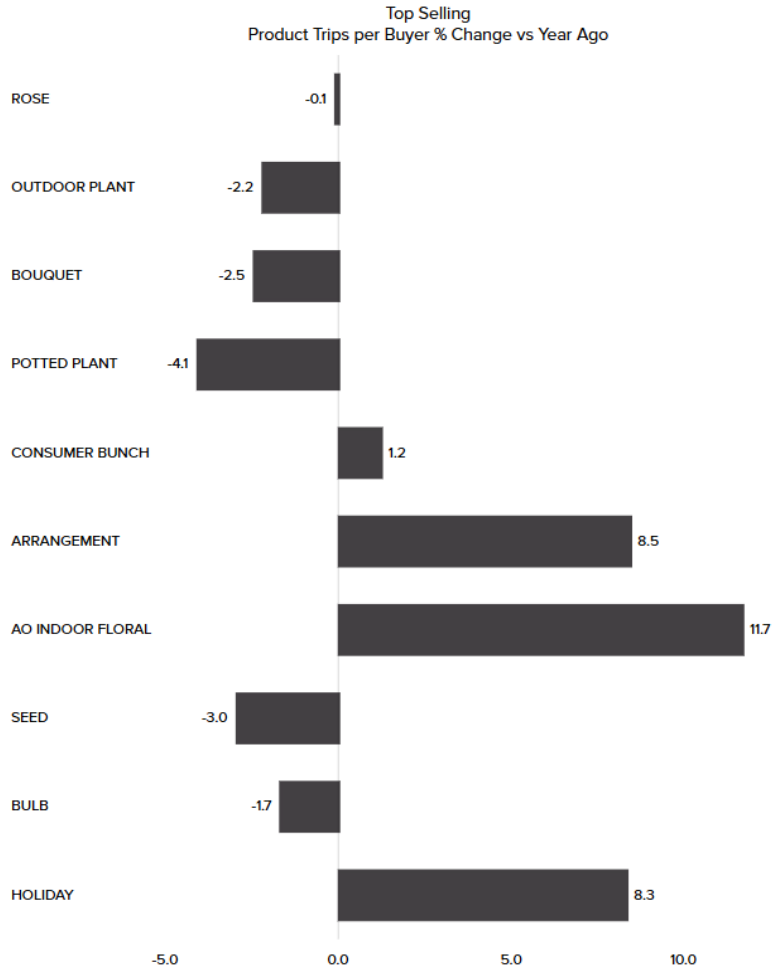


Source: Circana Integrated Fresh POS, Total US MULO+, 52 weeks ending 08-09-26

Consumer bunches, arrangements, AO indoor floral (consisted of ballons & giftware) and holiday floral are driving additional trips & frequency, important growth drivers

Rolling 52 Weeks Ending Aug-09-2026 | Product Trips per Buyer





Source: Circana Fresh Panel, Total US – All Outlets, L52wks ending 8/09/26-06-26

Total floral is in nearly 65% of households in the latest 52 weeks with almost 81% of shopper buying floral more than once!

DEPT-FLORAL CONSUMER PURCHASE SUMMARY

DEPT-FLORAL are in 65% of Total US - All Outlets HHs with a 82% repeat rate

+1.5%
Dollar Sales vs. YA

-2.4%
Unit Sales vs. YA

HH Penetration
64.8%
-1.2 pts
vs. YA

81.8%
DEPT-FLORAL Buyers Repeat

In Basket	Out of Basket
$84.60 / +$2.16	$51.25 / +$0.42

% of Basket Spent on Product
16.4% / +0.6

BUY RATE ($)
$143.62
2.7% vs. LY

BUY RATE (UNIT)
21.05
-1.2% vs. LY

TRIPS / BUYER
10.3
-3.5% vs. LY

$ / TRIP
$13.88
6.5% vs. LY

UNIT / TRIP
2.03
2.4% vs. LY

PURCHASE CYCLE
66 DAYS
0.5% vs. LY

Source: Circana Fresh Panel, Total US – All Outlets, L52wks ending 8/09/26-06-26

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Floral buyers are more likely to be 65+, male that are retired/unemployed, a 2-person household and upper income

DEPT-FLORAL BUYERS

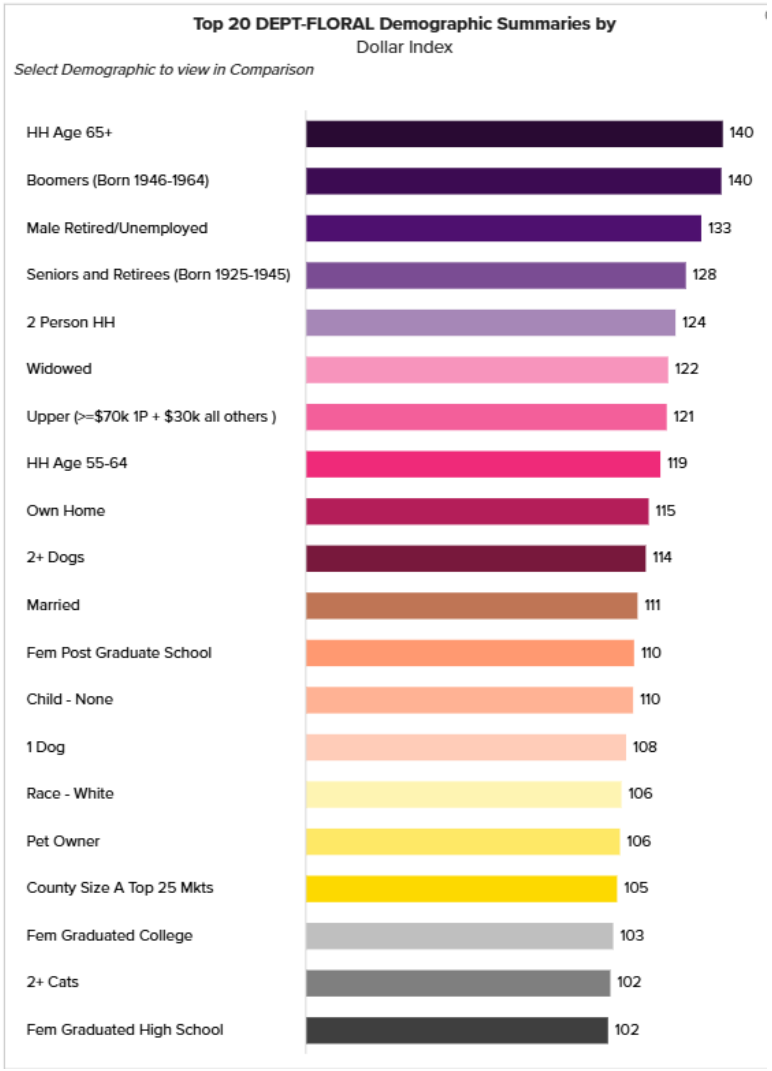
% HH Buying	$ per Buyer	$ per Trip	Product Trips per Buyer
65.7 / -0.1	$132.85 / 3.1%	$12.69 / 4.6%	10.5 / -1.4%
Middle ($30-70k 1P + $5k per add'l Person) (35% of Panel)			
65.1 / -0.8	$143.68 / 2.8%	$13.75 / 5.0%	10.5 / -2.1%
Total Panel			

Dollar Comparison

Top Demographics by Dollar Index

Select Demo Variable to Compare vs Total Panel
Select Demo Folder to view in Bar Chart

HH Head Age	HH Generation	HH Male Head Occupation
HH Age 65+	Boomers (Born 1946-1964)	Male Retired/Unemployed
140 I 40%	140 I 43%	133 I 23%
HH Size	**HH Marital Status**	**HH Income Per Capita**
2 Person HH	Widowed	Upper (>=$70k 1P + $30k all others)
124 I 42%	122 I 9%	121 I 52%
HH Home Ownership	**HH Dog Ownership**	**HH Female Head Education**
Own Home	2+ Dogs	Fem Post Graduate School
115 I 82%	114 I 19%	110 I 17%
HH Presence of Children	**HH Race**	**HH Pet Ownership**
Child - None	Race - White	Pet Owner
110 I 79%	106 I 77%	106 I 62%
HH County Size	**HH Cat Ownership**	**HH Hispanic Ethnicity**
County Size A Top 25 Mkts	2+ Cats	Non Hispanic/Unknown
105 I 42%	102 I 17%	101 I 88%



Source: Circana Fresh Panel, Total US – All Outlets, L52wks ending 8/09/26-06-26

Gen Z & Gen X are spending more in Floral than total retail F&B, but there is an opportunity to capture more spend in Floral with Millennials



Gen Alpha

Born 2013-2025
0-12 years old



Gen Z

Born 1997-2012
13-28 years old



Millennials

Born 1981-1996
29-44 years old



Gen X

Born 1965-1980
45-60 years old



Baby Boomers

Born 1946-1964
61-79 years old



Seniors

Born Before 1946
80+ years old

SHARE OF POPULATION

	Gen Alpha	Gen Z	Millennials	Gen X	Baby Boomers	Seniors
Share of Dollar Spend	14%	21%	22%	19%	19%	5%
Total F&B	N/A	*5%	28%	32%	33%	2%
Produce	N/A	*6%	28%	31%	33%	2%
Floral*	N/A	7%	26%	34%	29%	4%

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*Floral, Source: Circana Fresh Shopper Loyalty, L52wks ending 09-06-26- Grocery Stores Only

*Source: U.S. population share by generation 2024 | Statista: Source: Circana Fresh Panel, Total US – All Outlets, L52wks ending 09-06-26 % of spend controlled by generation, as determined by head of householder age, *Gen Z retail sales is representative of 19-28 years olds*


If we do what
we've always done…
We will get to where
we've always been…
And not far with the different
needs of today's consumers
Circana.

Discover your

fresh formula



VALUE DEFINITION + **SHOPPING EVOLVED** + **MOTIVATIONS + MINDSET**

We'd love to hear from you!
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