



2022 Q2

Potato Category Review

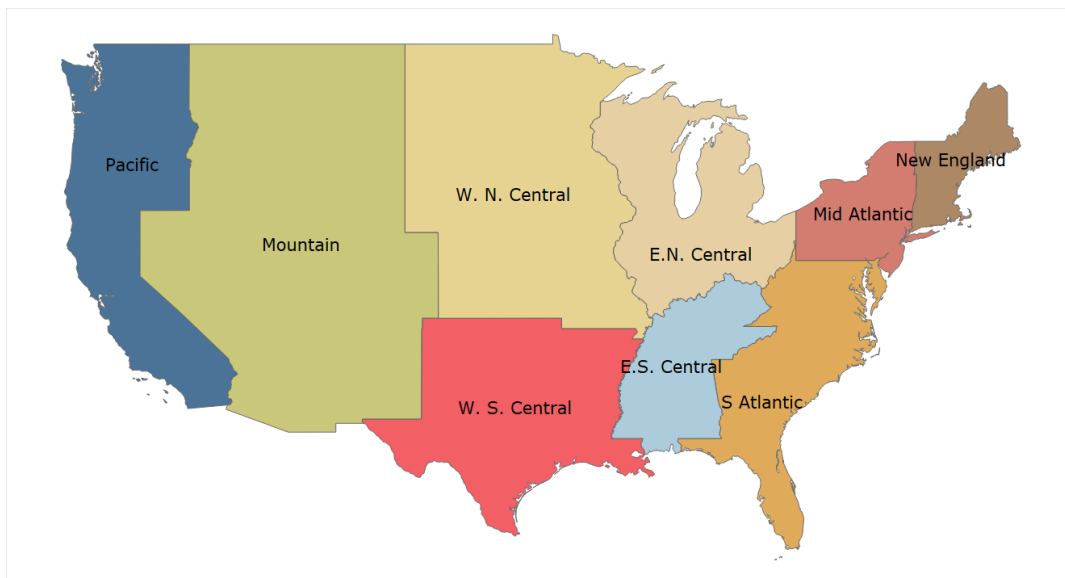
Idaho Potato Commission

July 22, 2022

2022 Q2 Potato Category Review

Background

- This report covers all potato performance for the Total U.S. as well as nine U.S. regions, as defined by NielsenIQ.
- Reporting period covers 13 weeks of Q2, 2022 vs. the same period last year.
- This report was prepared by Category Partners exclusively for the Idaho Potato Commission.
- Data in this report is provided under contract by Nielsen. Coverage is the database for total food sales in the United States including all outlets, i.e. supermarkets, mass merchandisers, club stores, dollar stores, convenience stores and military commissaries. Nielsen offers the industry's broadest measurement of total retail food inclusive of UPC and fresh non-UPC (random-weight) products across the entire store, for roughly 90,000 stores nationwide.
- Data coverage includes only potatoes sold in produce departments. Varieties are broken out as russet, red, yellow, white, convenience, and gourmet. Groupings are defined as:
 - » Convenience: Any fresh potato that can be prepared in its package. i.e. Micro-waveable
 - » Gourmet: Specialty potatoes 24oz pack size; including Fingerling, Baby, or Mixed
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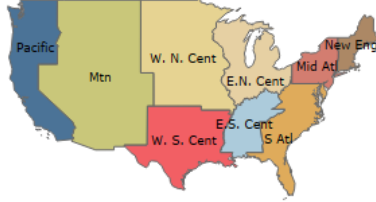
2022 Q2: Total US

Dollars Trend Up, Volume Not Far Behind

All nine regions gained in dollars and volume this quarter. While concerns between inflation and potato storage shortages remain high, retail sales in the category didn't flinch. Even volume, a declining metric in many categories this year, is up for potatoes.

Potatoes are a consistent staple with consumer diets and purchasing patterns. As the country enters its first recession in over ten years, fresh potatoes offer the best pound for pound value in the entire produce department.

Potatoes are inelastic which means consumers will NOT change their purchasing behavior even as prices continue to rise with increased transportation and product costs. Retailers can continue to capitalize on the opportunity to maximize sales dollars by raising prices.



	Dollar Share	Dollars	\$ % Chg YoY	Vol. Share	Volume (Lbs)	Vol. % Chg YoY
South Atlantic Division	23%	\$189M	+17.2%	21%	201M	+6.4%
East North Central Division	14%	\$115M	+19.3%	14%	136M	+3.3%
Pacific Division	12%	\$101M	+22.3%	12%	110M	+8.7%
West South Central Division	12%	\$97M	+19.0%	14%	132M	+6.9%
Middle Atlantic Division	11%	\$91M	+12.6%	10%	96M	+6.1%
Mountain Division	7%	\$60M	+22.1%	9%	83M	+8.8%
East South Central Division	7%	\$60M	+17.6%	7%	70M	+1.4%
West North Central Division	7%	\$56M	+21.7%	7%	71M	+7.8%
New England Division	6%	\$45M	+11.1%	5%	46M	+7.4%
Grand Total	100%	\$815M	+18.1%	100%	945M	+6.2%

Shoppers looking to buy more for less

As we dove into the COVID-19 pandemic, and even lasting until early this year, shoppers moved into the gourmet (24oz) and convenience (prepared in package) varieties. Smaller sizes and wrapped/bagged potatoes were more appealing to shop

pers trying to cook for themselves. But now, with inflation hitting new records, shoppers want more for less. Gourmet and convenience items are declining while larger pack sizes and bulks are taking their losses.

	Dollars	\$ Chg vs LY	\$ % Chg YoY	Volume (Lbs)	Vol. Chg vs LY	Vol. % Chg YoY
Russet	\$426.2M	+\$79.5M	+22.9%	629.7M	+50.3M	+8.7%
Red	\$128.9M	+\$11.3M	+9.6%	125.3M	-5.7M	-4.4%
Yellow	\$120.5M	+\$24.1M	+25.0%	112.9M	+10.1M	+9.9%
Gourmet	\$83.0M	+\$2.7M	+3.4%	32.5M	-0.9M	-2.6%
White	\$36.3M	+\$7.5M	+26.1%	35.9M	+2.6M	+7.6%
Convenience	\$20.3M	-\$0.3M	-1.3%	8.5M	-1.2M	-12.3%

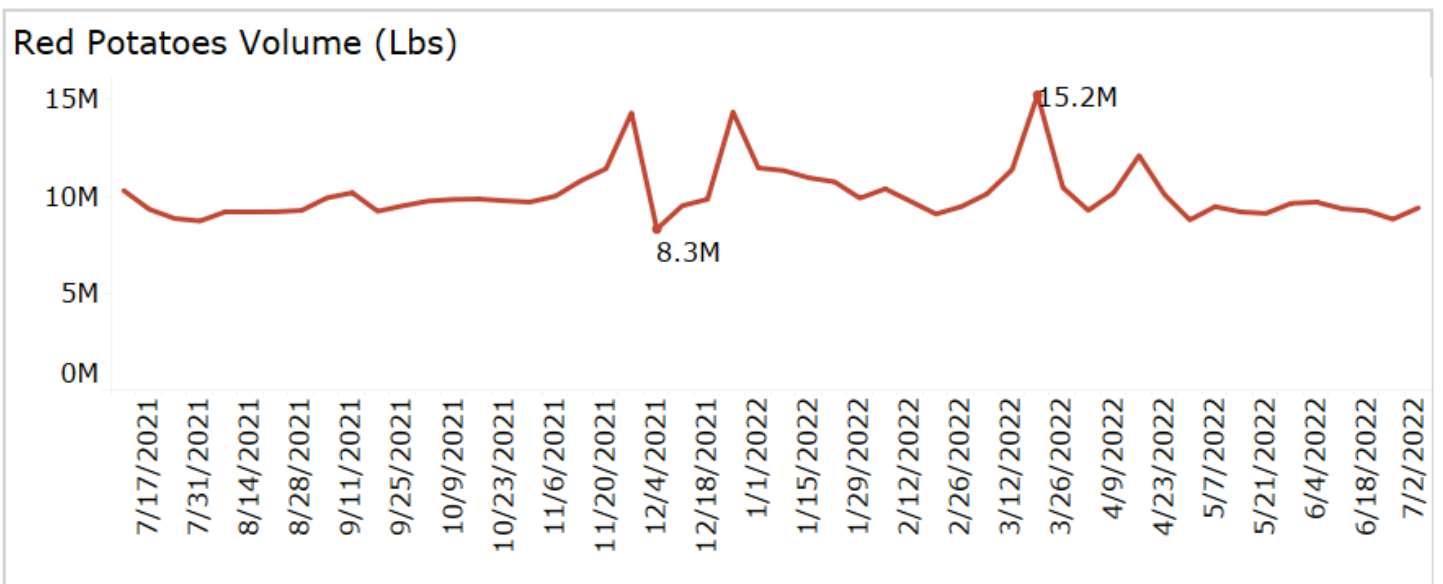
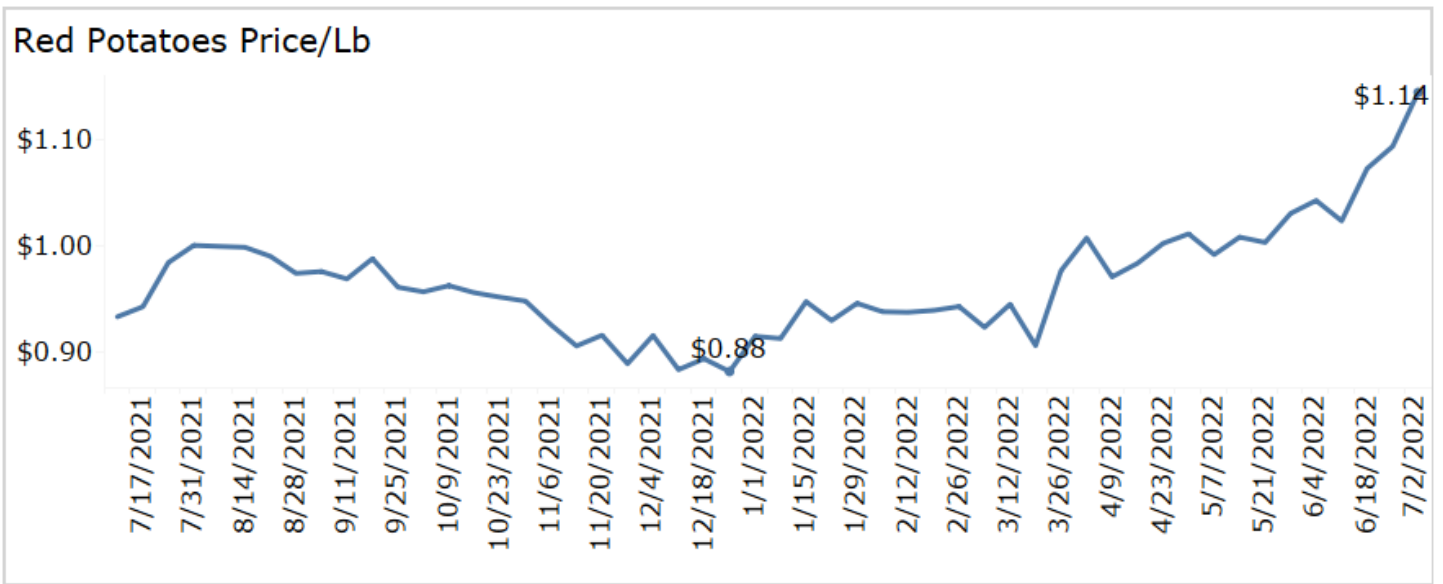


Red Potatoes: Annual Pricing Analysis

Reds Volume Steady in Q2

Reds have been gaining steady in price/lb since the beginning of the year. 2021 concluded at \$0.88/lb, while Q2 ended at \$1.14/lb. While prices rise, we see some volatility in volume sales, especially noticeable with a price drop in March, however no significant drops overall.

While prices have been on a rise since January, they have climbed the quickest in Q2 of this year. Yellow potatoes show an almost exact same price trend. While volume has dropped slightly in the weeks following mid-March, the change is not significant and volume even ended the quarter on a rise.



2022 Q2: East North Central Division

Russets Gaining on Rising Prices

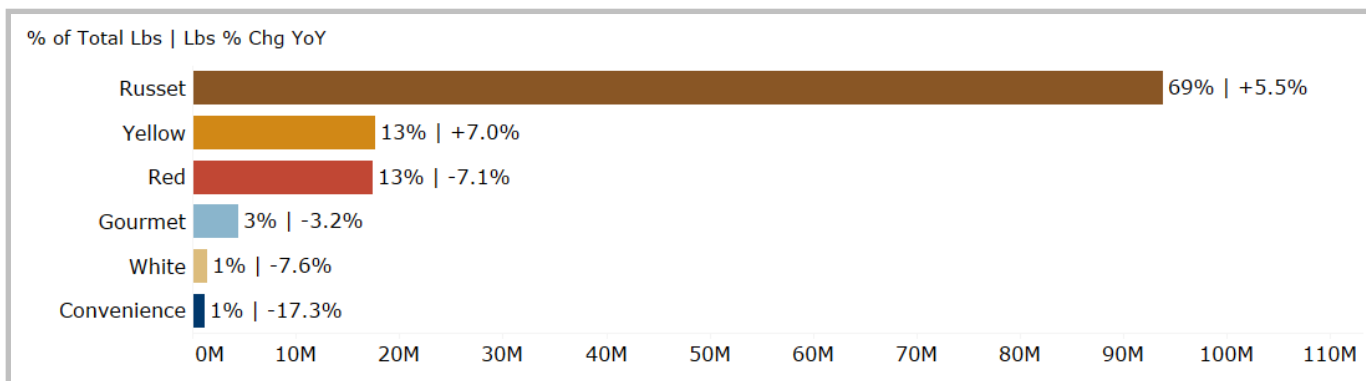
In Q2 2022, total russet dollars in the E.N. Central division were up +22.9%, while volume was also up at +5.5%. Every variety is up in dollars, but only russets and yellows are up in volume.

5lb bags are the top selling pack size in the E.N. Central division overall, carrying 52% of total potato volume. Of the 5lb pack sizes, russet 5lb item is the top selling item in the division, posting a dollar increase of +26.9% compared to year ago.

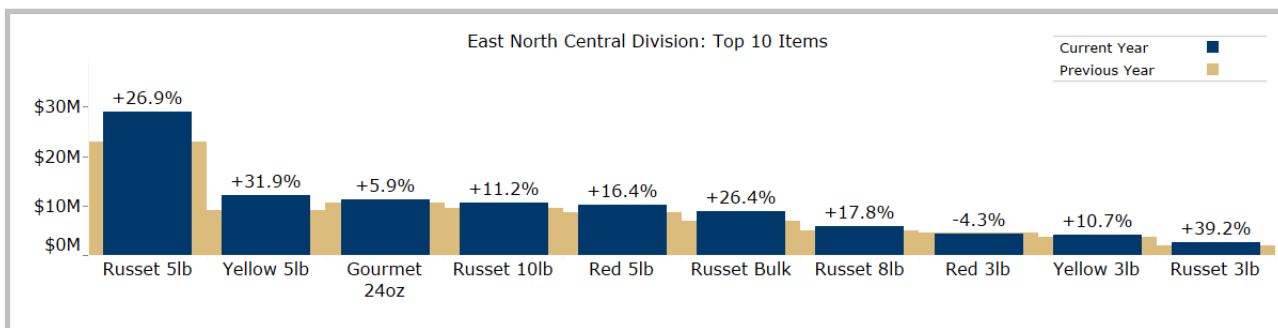
Q2 Performance: All Varieties

	Dollars	\$ Chg vs LY	\$ % Chg YoY	Volume (Lbs)	Vol. Chg vs LY	Vol. % Chg YoY	Avg Price/Lb	Price Per Lb Chg
Grand Total	\$114.71M	+\$18.41M	+19.1%	136.04M	+4.14M	+3.1%	\$0.84	+\$0.11
Russet	\$62.04M	+\$11.57M	+22.9%	93.83M	+4.87M	+5.5%	\$0.66	+\$0.09
Yellow	\$18.57M	+\$4.00M	+27.5%	17.63M	+1.15M	+7.0%	\$1.05	+\$0.17
Red	\$17.73M	+\$1.72M	+10.8%	17.50M	-1.35M	-7.1%	\$1.01	+\$0.16
Gourmet	\$11.33M	+\$0.80M	+7.6%	4.40M	-0.14M	-3.2%	\$2.58	+\$0.26
Convenience	\$3.23M	+\$0.02M	+0.7%	1.23M	-0.26M	-17.3%	\$2.63	+\$0.47
White	\$1.80M	+\$0.29M	+19.2%	1.46M	-0.12M	-7.6%	\$1.23	+\$0.28

All Varieties by Volume



Top 10 Items: All Varieties



2022 Q2: East South Central Division

Yellows Gain Dollars and Volume in Q2

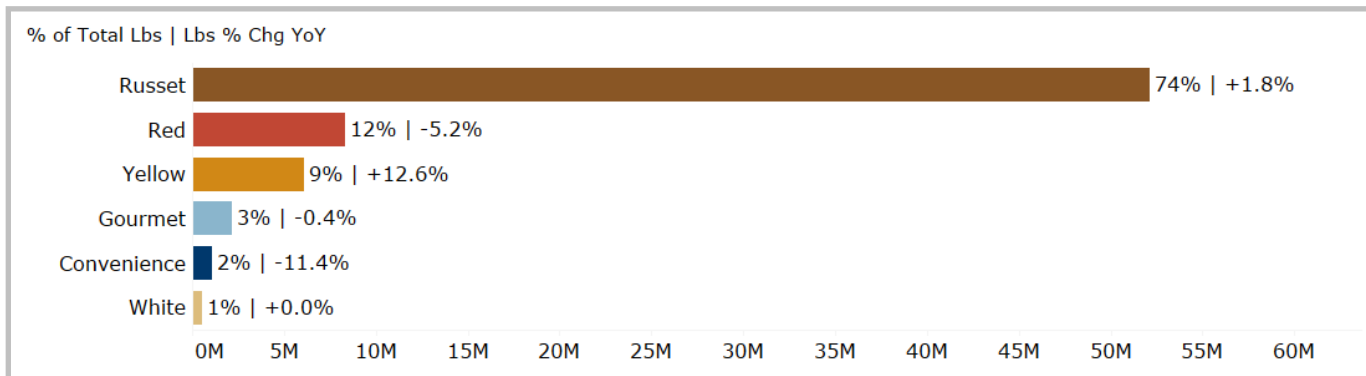
In Q2 2022, total russet dollars in the E.S. Central division were up +21.8%, while volume was also up at +1.8%. With the exception of russet and yellows volume, every variety is down in volume sales vs 2021 Q2.

5lb bags are the top selling pack size in the E.S. Central division overall, carrying 46% of total potato volume. Of the 5lb pack sizes, russet 5lb item is the top selling item in the division, posting a dollar increase of +24.3% compared to year ago.

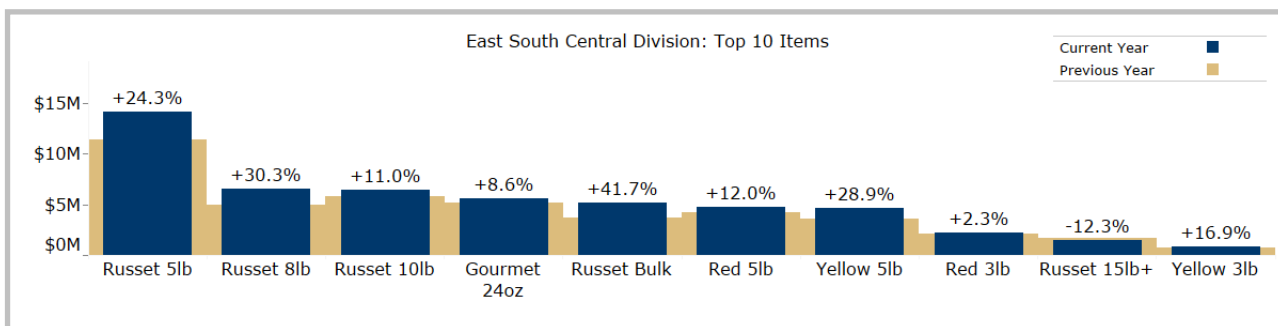
Q2 Performance: All Varieties

	Dollars	\$ Chg vs LY	\$ % Chg YoY	Volume (Lbs)	Vol. Chg vs LY	Vol. % Chg YoY	Avg Price/Lb	Price Per Lb Chg
Grand Total	\$60.11M	+\$9.01M	+17.6%	70.32M	+1.00M	+1.4%	\$0.85	+\$0.12
Russet	\$36.91M	+\$6.60M	+21.8%	52.16M	+0.92M	+1.8%	\$0.71	+\$0.12
Red	\$8.27M	+\$0.53M	+6.8%	8.31M	-0.45M	-5.2%	\$0.99	+\$0.11
Yellow	\$6.24M	+\$1.31M	+26.6%	6.08M	+0.68M	+12.6%	\$1.02	+\$0.11
Gourmet	\$5.66M	+\$0.48M	+9.3%	2.15M	-0.01M	-0.4%	\$2.64	+\$0.23
Convenience	\$2.46M	+\$0.04M	+1.9%	1.10M	-0.14M	-11.4%	\$2.24	+\$0.29
White	\$0.56M	+\$0.04M	+8.4%	0.52M	+0.00M	+0.0%	\$1.09	+\$0.09

All Varieties by Volume



Top 10 Items: All Varieties



2022 Q2: Middle Atlantic Division

5lb Russet Sales Outperform Total US

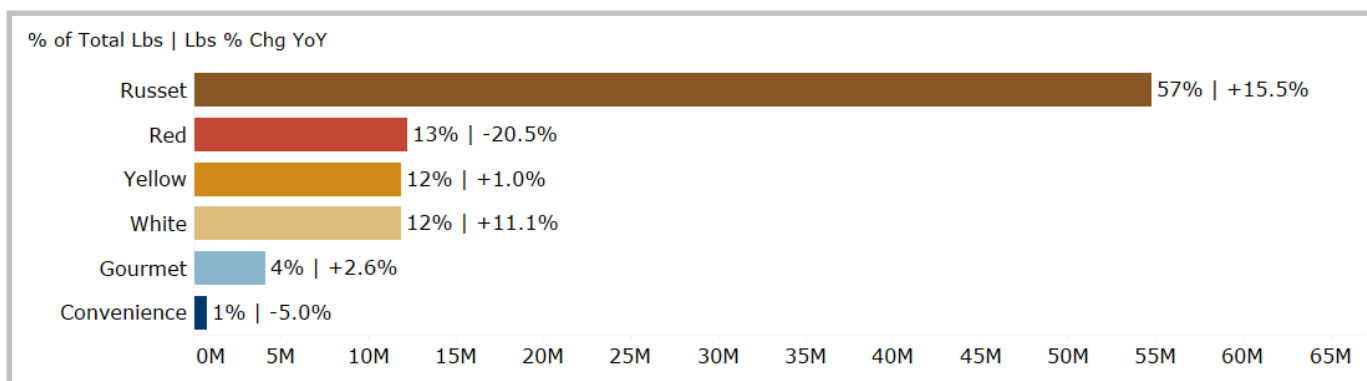
In Q2 2022, total russet dollars in the Mid Atlantic division were up +21.8%, while volume was up +15.5%. Reds and convenience are the only varieties down in volume, with reds also down in dollars.

5lb bags are the top selling pack size in the Mid Atlantic division overall, carrying 60% of total potato volume. Of the 5lb pack sizes, russet 5lb item is the top selling item in the Mid Atlantic division, posting a dollar increase of over +35.1% compared to Q2 2021.

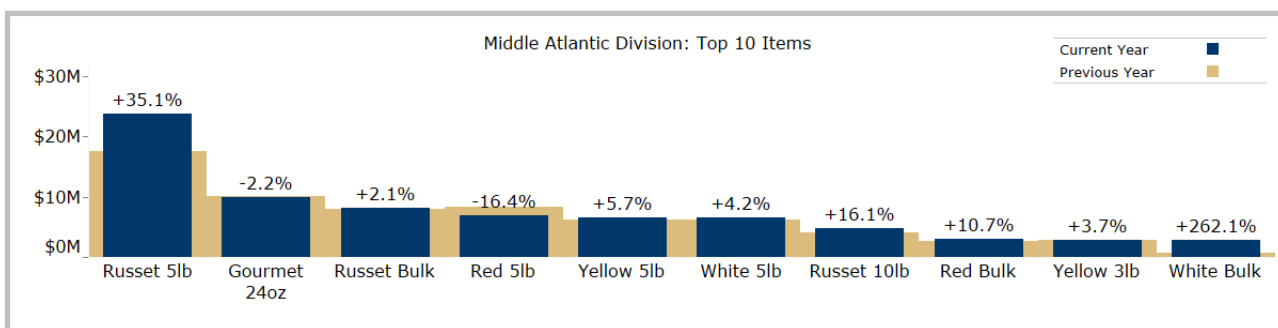
Q2 Performance: All Varieties

	Dollars	\$ Chg vs LY	\$ % Chg YoY	Volume (Lbs)	Vol. Chg vs LY	Vol. % Chg YoY	Avg Price/Lb	Price Per Lb Chg
Grand Total	\$91.50M	+\$10.24M	+12.6%	95.75M	+5.54M	+6.1%	\$0.96	+\$0.05
Russet	\$41.33M	+\$7.41M	+21.8%	54.81M	+7.35M	+15.5%	\$0.75	+\$0.04
Red	\$14.33M	-\$0.75M	-5.0%	12.27M	-3.17M	-20.5%	\$1.17	+\$0.19
Yellow	\$13.42M	+\$1.11M	+9.0%	11.89M	+0.12M	+1.0%	\$1.13	+\$0.08
Gourmet	\$10.17M	+\$0.07M	+0.7%	4.13M	+0.10M	+2.6%	\$2.46	-\$0.05
White	\$10.12M	+\$2.38M	+30.7%	11.89M	+1.19M	+11.1%	\$0.85	+\$0.13
Convenience	\$2.13M	+\$0.02M	+1.0%	0.76M	-0.04M	-5.0%	\$2.79	+\$0.17

All Varieties by Volume



Top 10 Items: All Varieties



2022 Q2: Mountain Division

Yellows Gaining Share in Q2

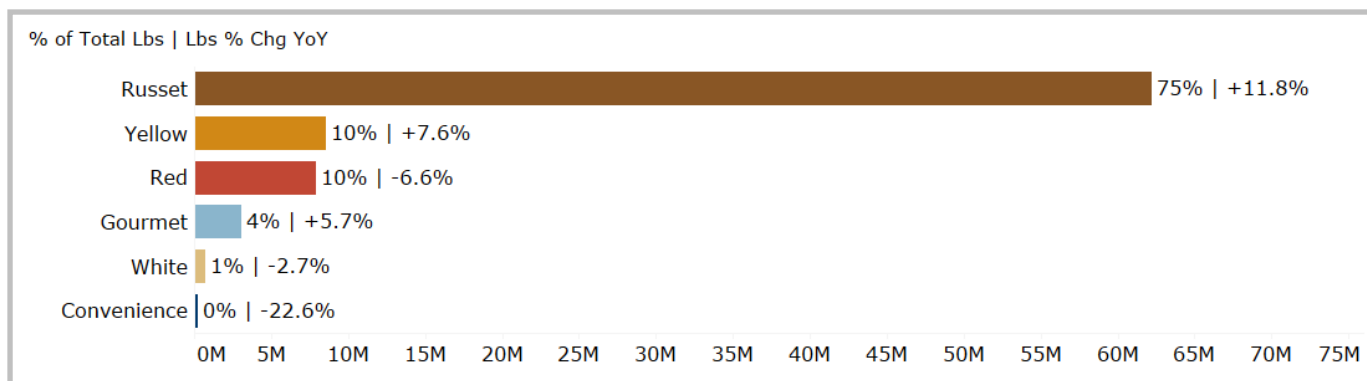
In Q2 2022, total russet dollars in the Mountain division were up +29%, while volume was up +11.8%. The top three varieties in this division were up in Q2 dollar and volume sales compared to 2021.

5lb bags are the top selling pack size in the Mountain division overall, carrying 45% of total potato volume. Of the 5lb pack sizes, russet 5lb item is the top selling item in the Mountain division, posting a dollar increase of +24.2% compared to year ago.

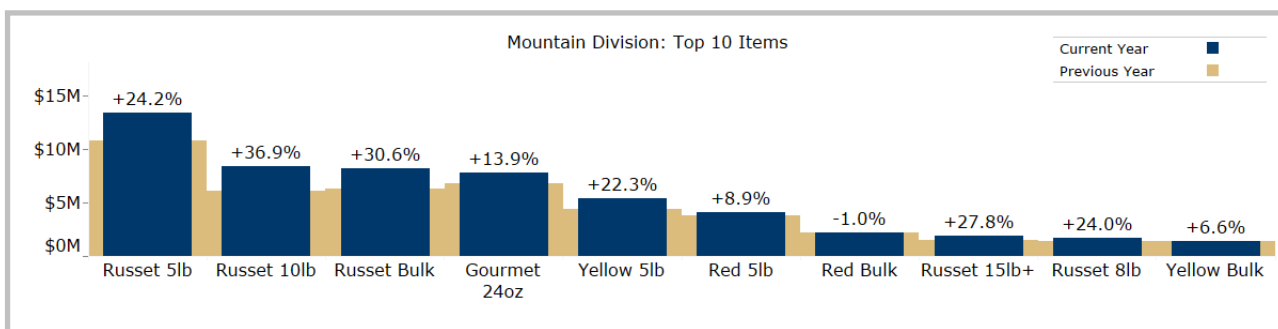
Q2 Performance: All Varieties

	Dollars	\$ Chg vs LY	\$ % Chg YoY	Volume (Lbs)	Vol. Chg vs LY	Vol. % Chg YoY	Avg Price/Lb	Price Per Lb Chg
Grand Total	\$60.37M	+\$10.95M	+22.1%	82.80M	+6.67M	+8.8%	\$0.73	+\$0.08
Russet	\$34.58M	+\$7.78M	+29.0%	62.25M	+6.55M	+11.8%	\$0.56	+\$0.07
Yellow	\$8.65M	+\$1.59M	+22.4%	8.57M	+0.60M	+7.6%	\$1.01	+\$0.12
Gourmet	\$7.95M	+\$1.14M	+16.7%	3.10M	+0.17M	+5.7%	\$2.57	+\$0.24
Red	\$7.75M	+\$0.58M	+8.1%	7.91M	-0.56M	-6.6%	\$0.98	+\$0.13
White	\$0.92M	-\$0.05M	-4.9%	0.75M	-0.02M	-2.7%	\$1.22	-\$0.03
Convenience	\$0.52M	-\$0.09M	-15.3%	0.21M	-0.06M	-22.6%	\$2.43	+\$0.21

All Varieties by Volume



Top 10 Items: All Varieties



2022 Q2: New England Division

Russets and Yellows Gain in Q2 Volume

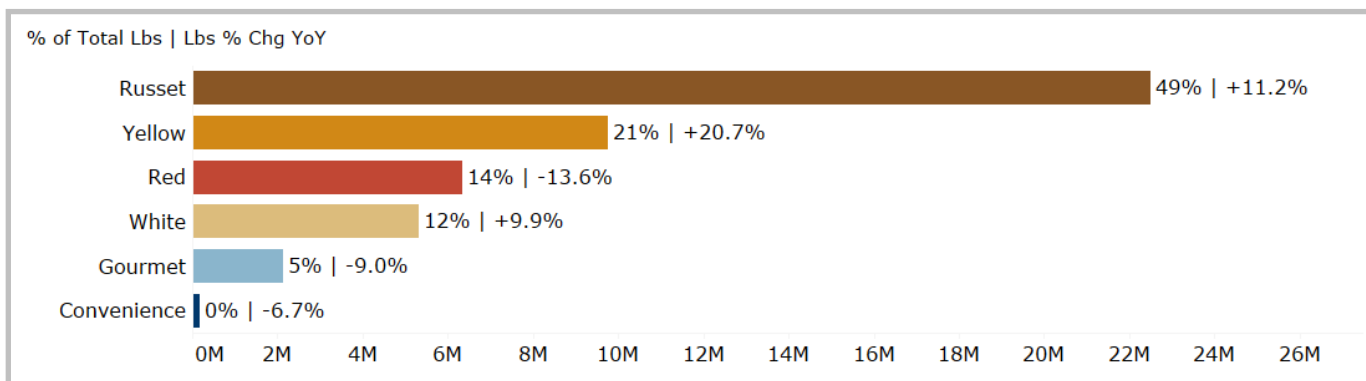
In Q2 2022, total russet dollars in the New England division were up +13.1%, while volume was up +11.2%. Yellows are up +20.7% in volume in this division, while reds are down -13.6% in volume.

5lb bags and bulk are the top selling pack sizes in the New England division overall, carrying 57% and 18% of total potato volume, respectively. In russets, the 5lb bag is the best selling pack size, posting Q2 gains of +19.4% in dollar sales.

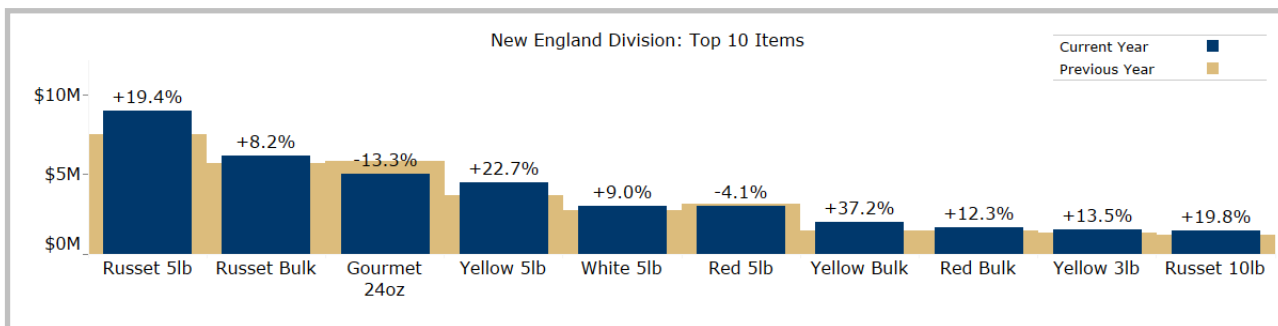
Q2 Performance: All Varieties

	Dollars	\$ Chg vs LY	\$ % Chg YoY	Volume (Lbs)	Vol. Chg vs LY	Vol. % Chg YoY	Avg Price/Lb	Price Per Lb Chg
Grand Total	\$45.33M	+\$4.53M	+11.1%	46.22M	+3.20M	+7.4%	\$0.98	+\$0.03
Russet	\$18.07M	+\$2.10M	+13.1%	22.51M	+2.27M	+11.2%	\$0.80	+\$0.01
Yellow	\$10.13M	+\$2.13M	+26.6%	9.75M	+1.67M	+20.7%	\$1.04	+\$0.05
Red	\$7.12M	+\$0.41M	+6.1%	6.33M	-1.00M	-13.6%	\$1.12	+\$0.21
Gourmet	\$5.28M	-\$0.56M	-9.5%	2.13M	-0.21M	-9.0%	\$2.48	-\$0.02
White	\$4.26M	+\$0.43M	+11.2%	5.32M	+0.48M	+9.9%	\$0.80	+\$0.01
Convenience	\$0.47M	+\$0.02M	+4.0%	0.18M	-0.01M	-6.7%	\$2.64	+\$0.27

All Varieties by Volume



Top 10 Items: All Varieties



2022 Q2: Pacific Division

Bulk Outperforms All Pack Sizes

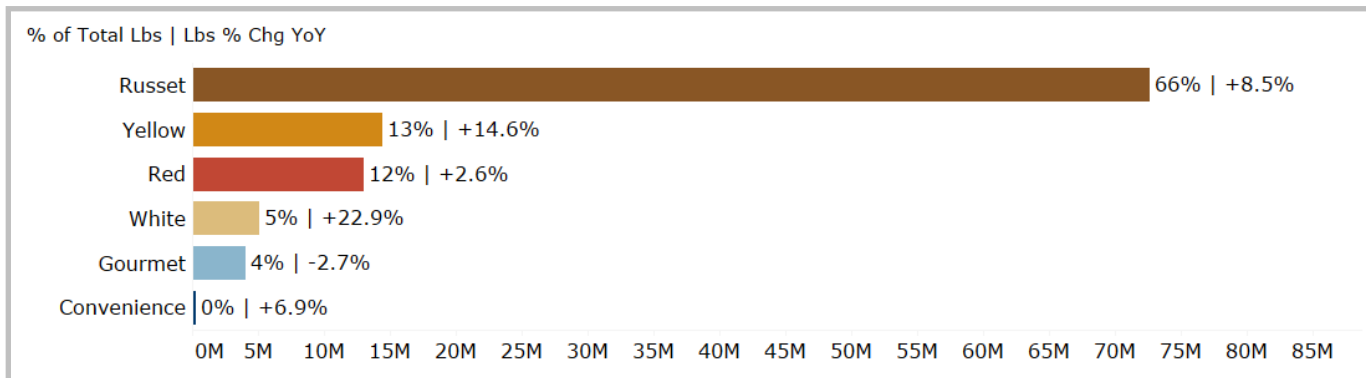
In Q2 2022, total russet dollars in the Pacific division were up +25.1%, while volume was up +8.5%. While gourmets were down by -2.7% in volume, every other variety was up in volume.

Bulks are the top selling pack size in the Pacific division overall, carrying 40% of total potato volume. Of russets, bulks are the top selling item in the division, posting a dollar increase of +25.6% compared to year ago. The Pacific is the only division in Q2 with bulk russets outperforming 5lb russets.

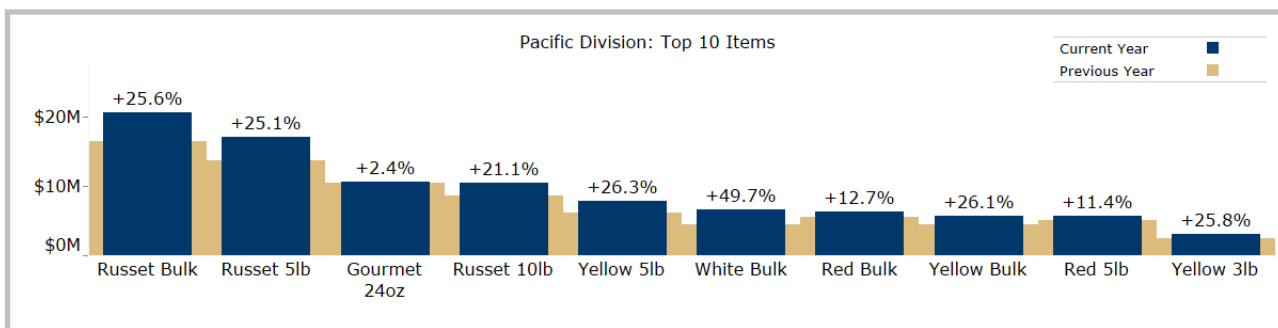
Q2 Performance: All Varieties

	Dollars	\$ Chg vs LY	\$ % Chg YoY	Volume (Lbs)	Vol. Chg vs LY	Vol. % Chg YoY	Avg Price/Lb	Price Per Lb Chg
Grand Total	\$100.92M	+\$18.45M	+22.4%	109.57M	+8.69M	+8.6%	\$0.92	+\$0.10
Russet	\$50.97M	+\$10.23M	+25.1%	72.67M	+5.66M	+8.5%	\$0.70	+\$0.09
Yellow	\$17.15M	+\$3.72M	+27.7%	14.41M	+1.84M	+14.6%	\$1.19	+\$0.12
Red	\$14.39M	+\$1.80M	+14.3%	13.01M	+0.33M	+2.6%	\$1.11	+\$0.11
Gourmet	\$10.81M	+\$0.45M	+4.4%	4.08M	-0.11M	-2.7%	\$2.65	+\$0.18
White	\$6.91M	+\$2.25M	+48.2%	5.10M	+0.95M	+22.9%	\$1.35	+\$0.23
Convenience	\$0.69M	+\$0.00M	-0.1%	0.31M	+0.02M	+6.9%	\$2.25	-\$0.16

All Varieties by Volume



Top 10 Items: All Varieties



2022 Q2: South Atlantic Division

Bags Gain, as Lower Pack Sizes Fall

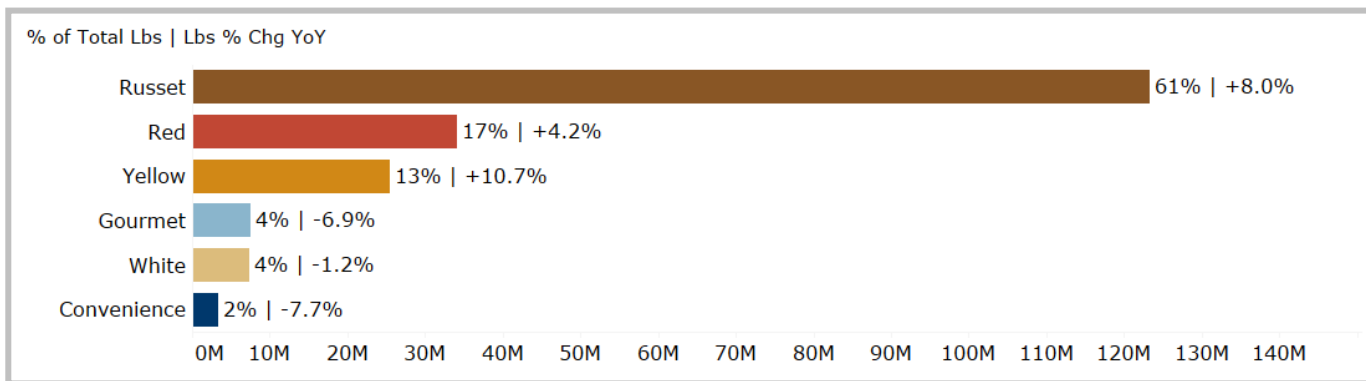
In Q2 2022, total russet dollars in the South Atlantic division were up +21.8%, while volume was up +8%. Reds had the greatest Q2 volume growth in the South Atlantic compared to any other division in the US.

5lb bags are the top selling pack size in the South Atlantic division overall, carrying 50% of total potato volume. Of the 5lb pack sizes, russet 5lb item is the top selling item in the division, posting a dollar increase of +24.3% compared to year ago.

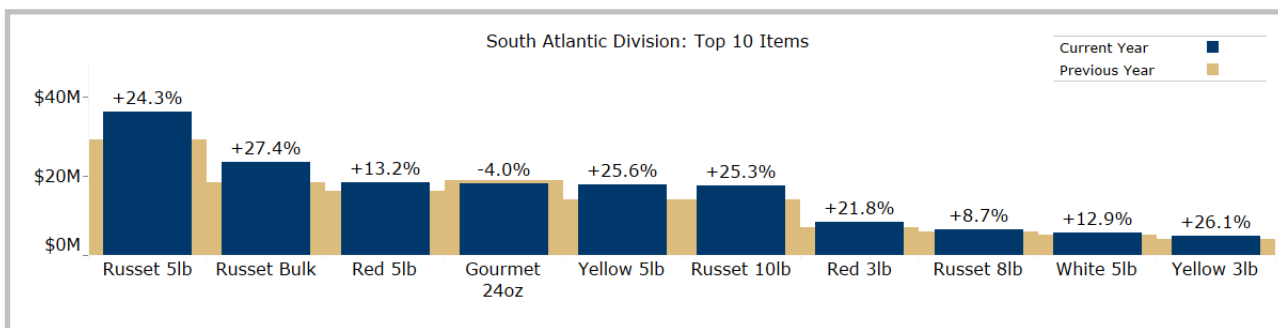
Q2 Performance: All Varieties

	Dollars	\$ Chg vs LY	\$ % Chg YoY	Volume (Lbs)	Vol. Chg vs LY	Vol. % Chg YoY	Avg Price/Lb	Price Per Lb Chg
Grand Total	\$188.50M	+\$27.61M	+17.2%	201.17M	+12.02M	+6.4%	\$0.94	+\$0.09
Russet	\$94.58M	+\$16.90M	+21.8%	123.39M	+9.09M	+8.0%	\$0.77	+\$0.09
Red	\$33.93M	+\$4.41M	+14.9%	34.09M	+1.38M	+4.2%	\$1.00	+\$0.09
Yellow	\$26.66M	+\$5.64M	+26.8%	25.48M	+2.47M	+10.7%	\$1.05	+\$0.13
Gourmet	\$18.27M	-\$0.48M	-2.6%	7.50M	-0.56M	-6.9%	\$2.44	+\$0.11
Convenience	\$8.14M	+\$0.38M	+5.0%	3.29M	-0.27M	-7.7%	\$2.48	+\$0.30
White	\$6.92M	+\$0.76M	+12.3%	7.42M	-0.09M	-1.1%	\$0.93	+\$0.11

All Varieties by Volume



Top 10 Items: All Varieties



2022 Q2: West North Central Division

Yellows Just Short of Passing Red Sales

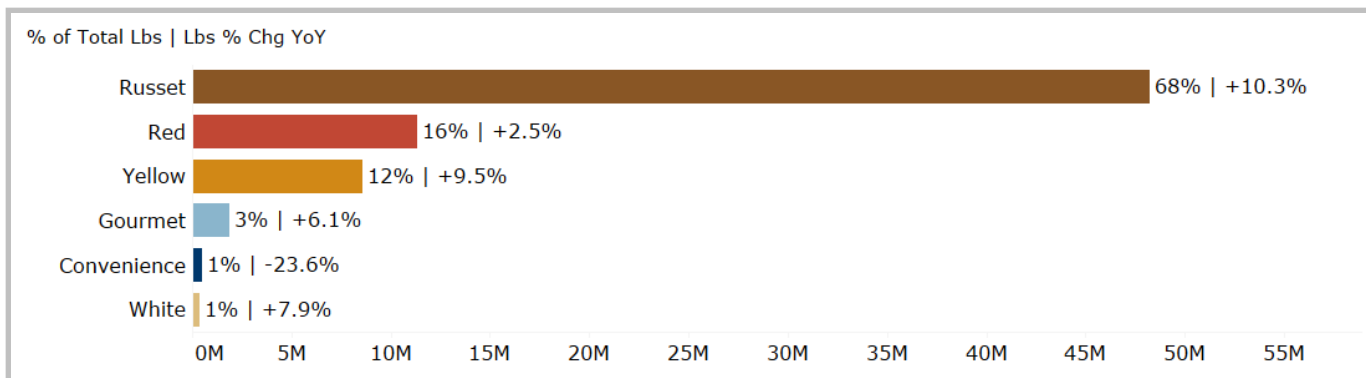
In Q2 2022, total russet dollars in the W.N. Central division were up +27.2%, while volume was up +10.3%. Reds had the greatest Q2 dollar sales in the WNC over any other division in the US at +16.8%.

5lb bags are the top selling pack size in the W.N. Central division overall, carrying 57% of total potato volume. Of the 5lb pack sizes, russet 5lb item is the top selling item in the division, posting a dollar increase of +28.4% compared to year ago.

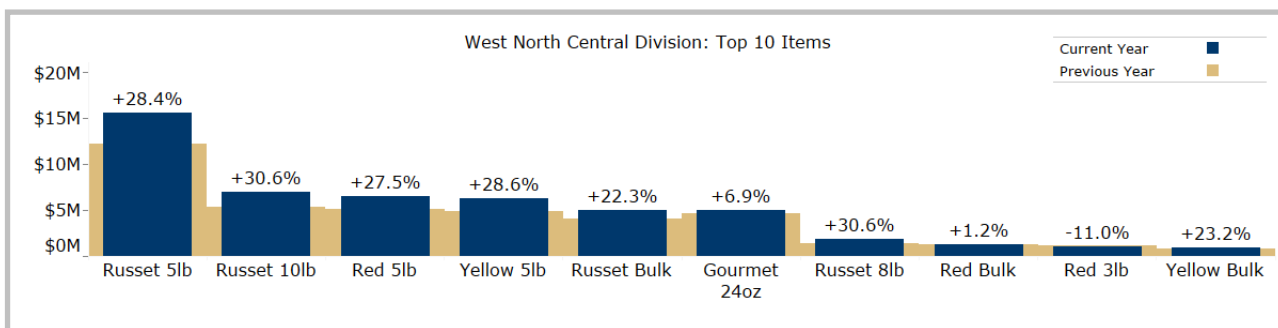
Q2 Performance: All Varieties

	Dollars	\$ Chg vs LY	\$ % Chg YoY	Volume (Lbs)	Vol. Chg vs LY	Vol. % Chg YoY	Avg Price/Lb	Price Per Lb Chg
Grand Total	\$56.32M	+\$10.27M	+22.3%	70.96M	+5.53M	+8.4%	\$0.79	+\$0.09
Russet	\$30.94M	+\$6.61M	+27.2%	48.26M	+4.51M	+10.3%	\$0.64	+\$0.08
Red	\$9.95M	+\$1.43M	+16.8%	11.36M	+0.28M	+2.5%	\$0.88	+\$0.11
Yellow	\$8.99M	+\$2.06M	+29.7%	8.60M	+0.75M	+9.5%	\$1.05	+\$0.16
Gourmet	\$5.01M	+\$0.36M	+7.7%	1.90M	+0.11M	+6.1%	\$2.63	+\$0.04
Convenience	\$1.00M	-\$0.24M	-19.4%	0.48M	-0.15M	-23.6%	\$2.10	+\$0.11
White	\$0.43M	+\$0.05M	+14.0%	0.37M	+0.03M	+7.9%	\$1.17	+\$0.06

All Varieties by Volume



Top 10 Items: All Varieties



2022 Q2: West South Central Division

Russet 5lb Jump in Q2 Sales

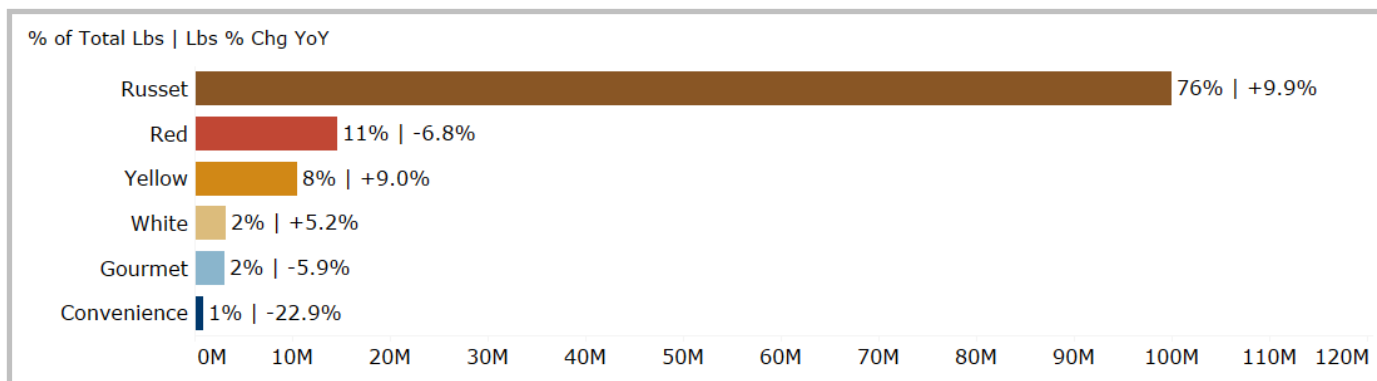
In Q2 2022, total russet dollars in the W.S. Central division were up +22.3%, while volume was up +9.9%. Russets, yellows, and whites all outperformed previous year sales by over +5% in volume and dollars.

5lb bags are the top selling pack size in the W.S. Central division overall, carrying 39% of total potato volume. Of the 5lb pack sizes, russet 5lb item is the top selling item in the division, posting a dollar increase of +25.2% compared to year ago.

Q2 Performance: All Varieties

	Dollars	\$ Chg vs LY	\$ % Chg YoY	Volume (Lbs)	Vol. Chg vs LY	Vol. % Chg YoY	Avg Price/Lb	Price Per Lb Chg
Grand Total	\$97.47M	+\$15.54M	+19.0%	132.38M	+8.50M	+6.9%	\$0.74	+\$0.07
Russet	\$56.93M	+\$10.37M	+22.3%	100.05M	+9.01M	+9.9%	\$0.57	+\$0.06
Red	\$15.31M	+\$1.20M	+8.5%	14.68M	-1.07M	-6.8%	\$1.04	+\$0.15
Yellow	\$10.55M	+\$2.52M	+31.4%	10.49M	+0.87M	+9.0%	\$1.01	+\$0.17
Gourmet	\$8.49M	+\$0.46M	+5.8%	3.07M	-0.19M	-5.9%	\$2.76	+\$0.30
White	\$4.53M	+\$1.41M	+45.1%	3.18M	+0.16M	+5.2%	\$1.42	+\$0.39
Convenience	\$1.66M	-\$0.42M	-20.3%	0.91M	-0.27M	-22.9%	\$1.82	+\$0.06

All Varieties by Volume



Top 10 Items: All Varieties

