



2022 Q1

# Potato Category Review

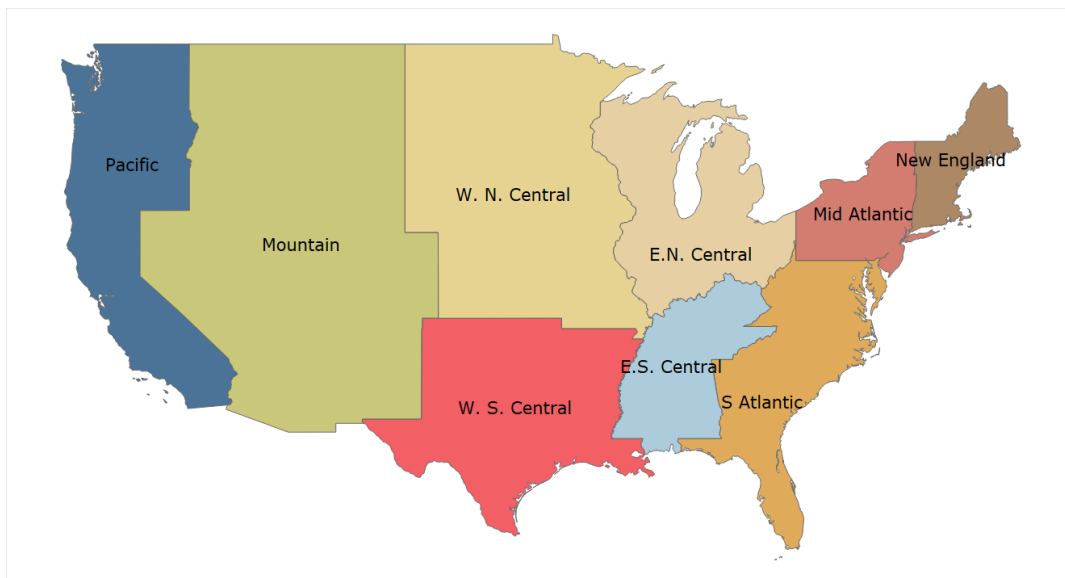
Idaho Potato Commission

April 15, 2022

# 2022 Q1 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 12 weeks of Q1, 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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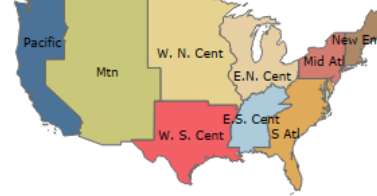


# 2022 Q1: Total US

## Dollars Trend Up, Volume Not Far Behind

All nine regions have gained in dollars this quarter. While inflation and rising freight costs are popular conversation, volume is not far behind these sales improvements in Q1. In the total US, volume was down -0.4%, while dollars were up +8.1%.

Post COVID shortages, both in goods and employment, caused pauses and re-prioritization of freight costs and availability. As a result, shipping costs began to rise and volume shipments began to fall. Despite volume declines, no total division experienced more than -5% year-over-year volume drop in Q1.



	Dollar Share	Dollars	\$ % Chg YoY	Vol. Share	Volume (Lbs)	Vol. % Chg YoY
South Atlantic Division	24%	\$182M	+10.1%	21%	204M	+2.8%
East North Central Division	14%	\$108M	+10.8%	15%	141M	-0.7%
Pacific Division	12%	\$95M	+6.5%	11%	108M	-3.0%
West South Central Division	12%	\$92M	+11.1%	14%	132M	+1.6%
Middle Atlantic Division	11%	\$87M	+0.7%	10%	97M	-4.6%
Mountain Division	7%	\$57M	+10.8%	9%	82M	+1.3%
East South Central Division	7%	\$56M	+9.9%	7%	71M	-1.9%
West North Central Division	7%	\$51M	+7.8%	7%	70M	-1.2%
New England Division	6%	\$44M	+2.6%	5%	49M	-2.6%
Grand Total	100%	\$772M	+8.1%	100%	955M	-0.4%

## Yellows Playing Catch-up

Growers are planting more yellow potatoes and less reds, and retail sales prove that it's the right move. Yellows gained the most in year-over-year sales in Q1, with over +12% dollar growth and over +7% volume growth.

Convenience (single wrap potatoes) saw the greatest drop. Surprisingly, Gourmet items also posted dollar and unit growth despite the inflationary trends of consumers looking for more cost effective items.

	Dollars	\$ Chg vs LY	\$ % Chg YoY	Volume (Lbs)	Vol. Chg vs LY	Vol. % Chg YoY
Russet	\$397.7M	+\$31.2M	+8.5%	623.0M	-8.5M	-1.3%
Red	\$121.0M	+\$2.5M	+2.1%	128.9M	-4.6M	-3.5%
Yellow	\$114.9M	+\$12.8M	+12.5%	122.0M	+8.6M	+7.6%
Gourmet	\$84.2M	+\$6.8M	+8.8%	33.5M	+0.7M	+2.1%
White	\$33.6M	+\$3.9M	+13.3%	38.1M	+0.7M	+1.9%
Convenience	\$20.4M	+\$0.9M	+4.4%	8.7M	-0.7M	-7.4%

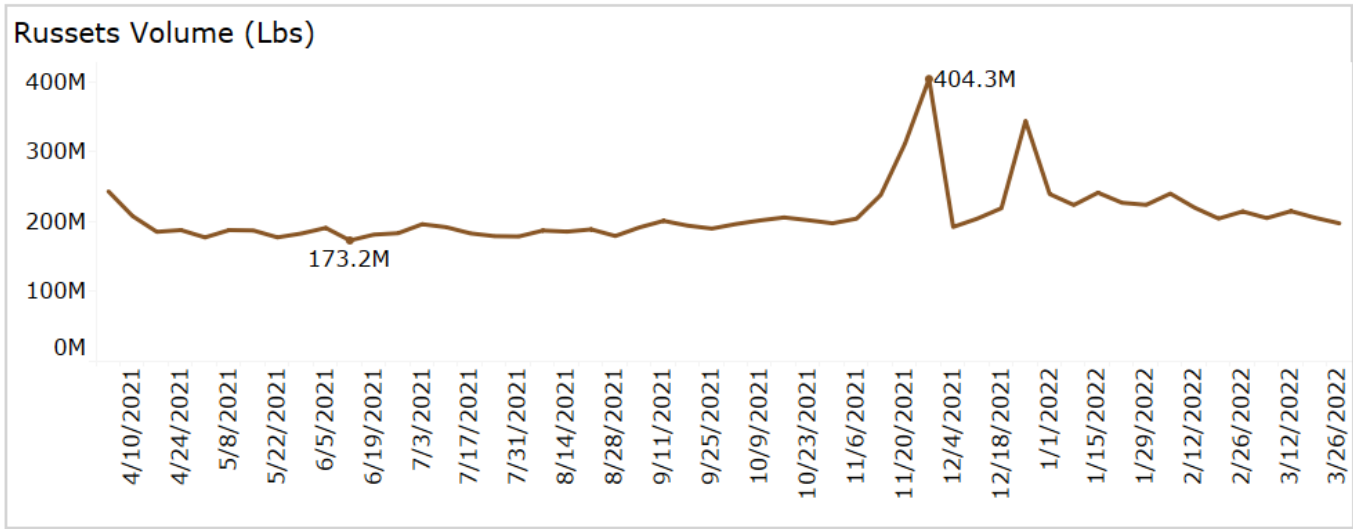
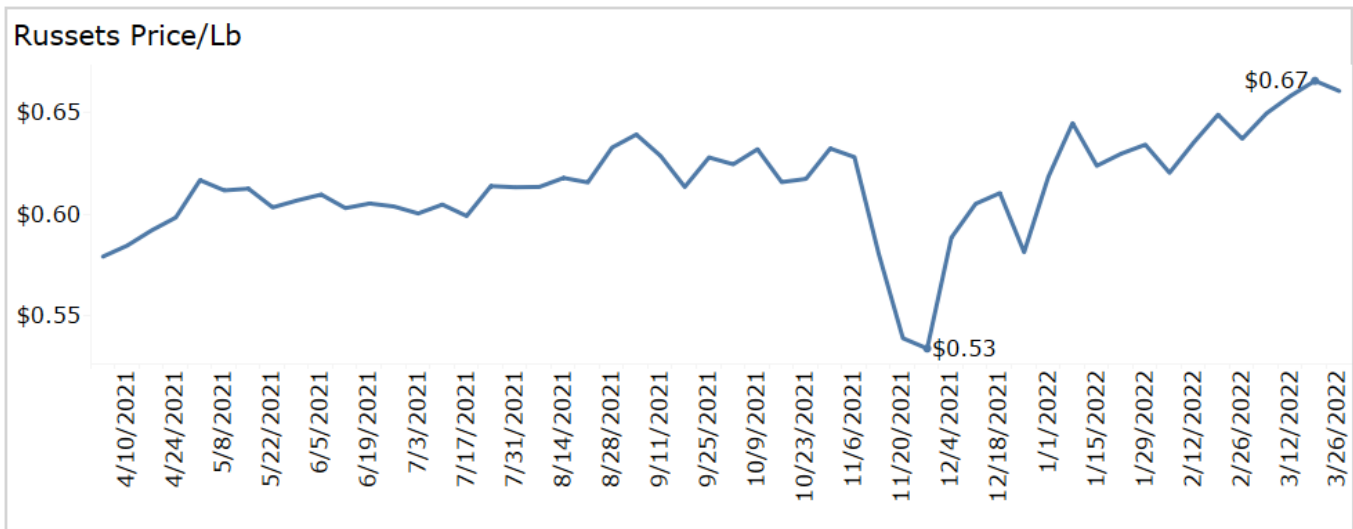


# 2022 Q1: Russet Pricing

## Russet Prices on the Rise

In the ending weeks of Q1, russets saw the greatest spike in price/lb over previous weeks of all varieties. Until the last 4 weeks, prices remained somewhat steady throughout the quarter, though are noticeably higher in comparison to 2021 Q1.

Despite rising prices in March, dollar and volume sales remained high, even out performing 2021 at a weekly comparison. For total Q1, russets experienced a -1.3% volume decrease, but it is not all attributed to rising prices.



# 2022 Q1: Middle Atlantic Division

## Russets and Gourmets Gain in Q1

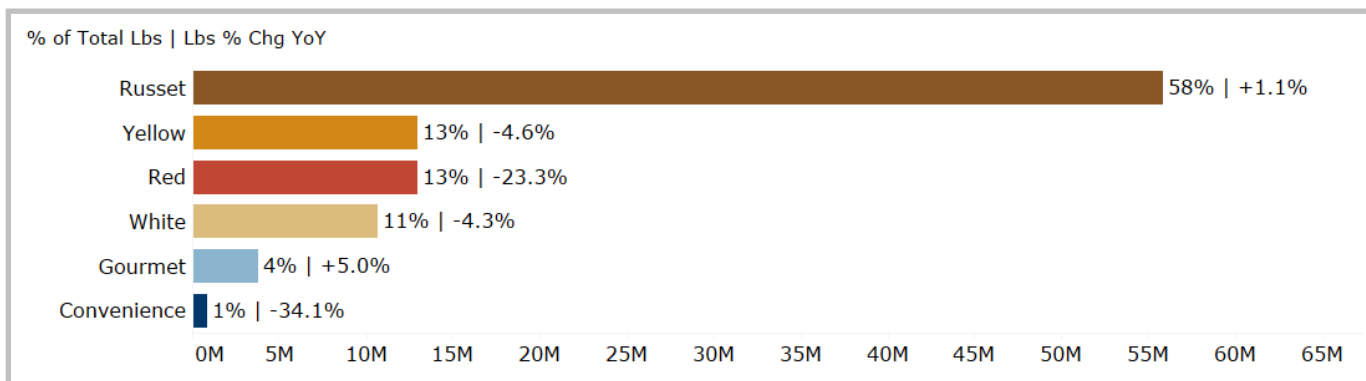
In Q1 2022, total russet dollars in the Mid Atlantic division were up +6.7%, while volume was up +1.1%. Russets and gourmets are the only varieties up in dollars and volume sold compared to 2021.

5lb bags are the top selling pack size in the Mid Atlantic division overall, carrying 59% 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 +4.0% compared to year ago.

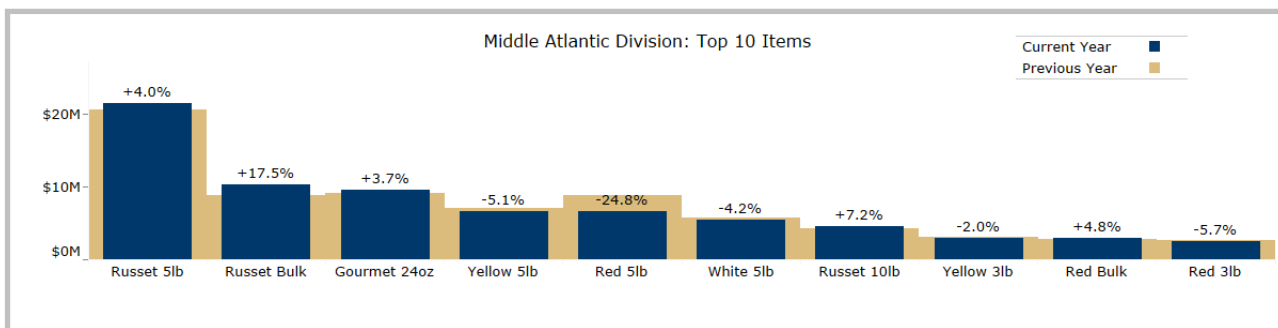
### Q1 Performance: All Varieties

	Dollars	\$ Chg vs LY	\$ % Chg YoY	Volume (Lbs)	Vol. Chg vs LY	Vol. % Chg YoY	Avg Price/Lb	Price Per Lb Chg
<b>Grand Total</b>	<b>\$87.01M</b>	<b>+\$0.57M</b>	<b>+0.7%</b>	<b>97.09M</b>	<b>-4.71M</b>	<b>-4.6%</b>	<b>\$0.90</b>	<b>+\$0.05</b>
Russet	\$40.47M	+\$2.54M	+6.7%	55.85M	+0.59M	+1.1%	\$0.72	+\$0.04
Red	\$13.80M	-\$2.01M	-12.7%	12.92M	-3.92M	-23.3%	\$1.07	+\$0.13
Yellow	\$13.22M	-\$0.27M	-2.0%	12.96M	-0.63M	-4.6%	\$1.02	+\$0.03
Gourmet	\$9.76M	+\$0.57M	+6.2%	3.81M	+0.18M	+5.0%	\$2.56	+\$0.03
White	\$7.45M	+\$0.25M	+3.5%	10.68M	-0.48M	-4.3%	\$0.70	+\$0.05
Convenience	\$2.31M	-\$0.51M	-18.2%	0.86M	-0.45M	-34.1%	\$2.67	+\$0.52

### All Varieties by Volume



### Top 10 Items: All Varieties



# 2022 Q1: East North Central Division

## Potato Sales Dollars Grow as Prices Rise

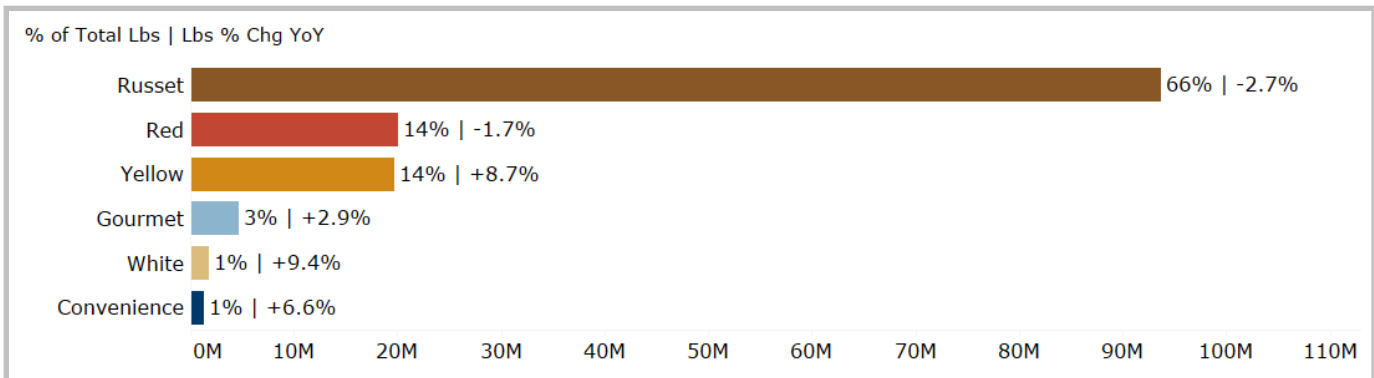
In Q1 2022, total russet dollars in the E.N. Central division were up +10.3%, while volume was down -2.7%. Every variety is up in dollars, with only 2 of the 6 variety groups down in volume compared to 2021.

5lb bags are the top selling pack size in the E.N. Central division overall, carrying 54% 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 +10.6% compared to year ago.

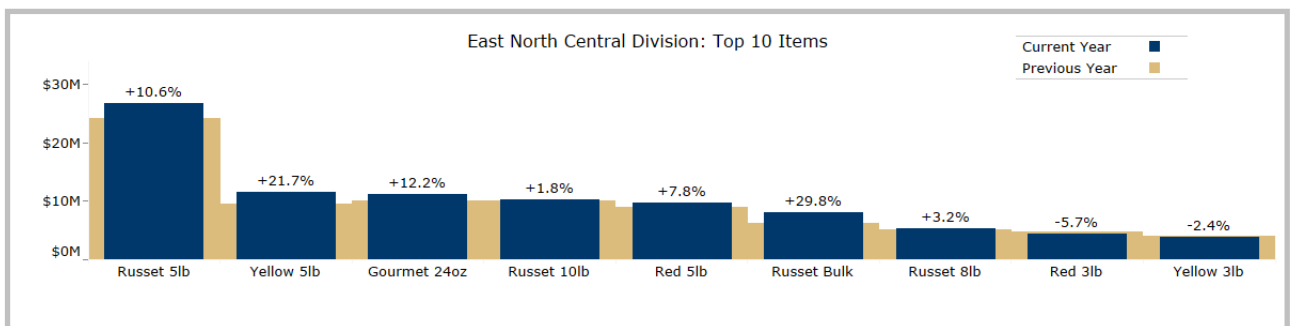
### Q1 Performance: All Varieties

	Dollars	\$ Chg vs LY	\$ % Chg YoY	Volume (Lbs)	Vol. Chg vs LY	Vol. % Chg YoY	Avg Price/Lb	Price Per Lb Chg
<b>Grand Total</b>	<b>\$107.67M</b>	<b>+\$10.45M</b>	<b>+10.8%</b>	<b>141.20M</b>	<b>-0.99M</b>	<b>-0.7%</b>	<b>\$0.76</b>	<b>+\$0.08</b>
Russet	\$56.70M	+\$5.30M	+10.3%	93.71M	-2.58M	-2.7%	\$0.61	+\$0.07
Yellow	\$17.25M	+\$2.09M	+13.8%	19.74M	+1.57M	+8.7%	\$0.87	+\$0.04
Red	\$17.21M	+\$0.69M	+4.2%	20.01M	-0.35M	-1.7%	\$0.86	+\$0.05
Gourmet	\$11.39M	+\$1.38M	+13.8%	4.63M	+0.13M	+2.9%	\$2.46	+\$0.24
Convenience	\$3.12M	+\$0.52M	+19.9%	1.28M	+0.08M	+6.6%	\$2.44	+\$0.27
White	\$2.00M	+\$0.48M	+31.2%	1.82M	+0.16M	+9.4%	\$1.10	+\$0.18

### All Varieties by Volume



### Top 10 Items: All Varieties



# 2022 Q1: East South Central Division

## All Varieties Gain in Q1 Dollars

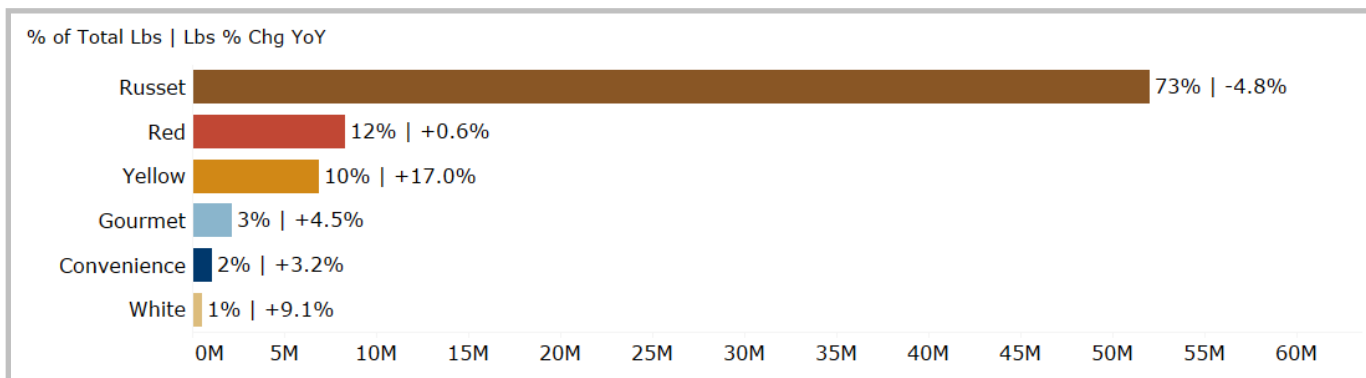
In Q1 2022, total russet dollars in the E.S. Central division were up +7.8%, while volume was down -4.8%. With the exception of russet volume, every variety is up in dollar and volume sales vs 2021 Q1.

5lb bags are the top selling pack size in the E.S. Central division overall, carrying 48% 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 +14.4% compared to year ago.

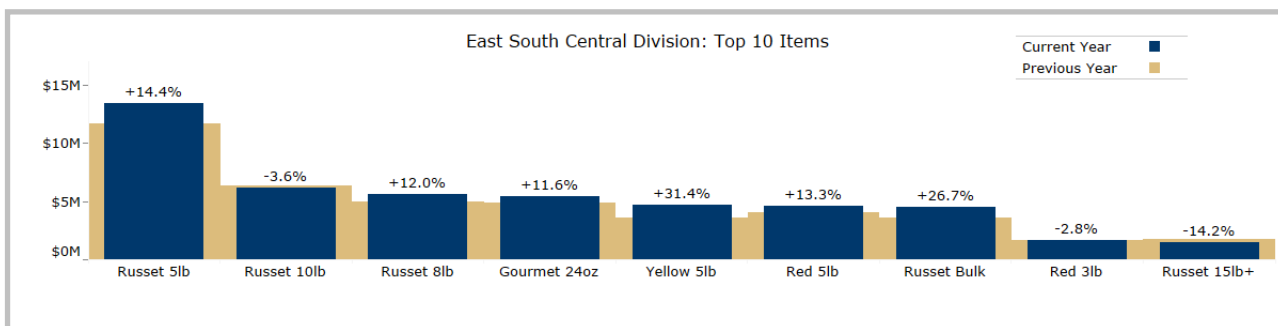
### Q1 Performance: All Varieties

	Dollars	\$ Chg vs LY	\$ % Chg YoY	Volume (Lbs)	Vol. Chg vs LY	Vol. % Chg YoY	Avg Price/Lb	Price Per Lb Chg
<b>Grand Total</b>	<b>\$55.60M</b>	<b>+\$5.02M</b>	<b>+9.9%</b>	<b>71.10M</b>	<b>-1.41M</b>	<b>-1.9%</b>	<b>\$0.78</b>	<b>+\$0.08</b>
Russet	\$33.67M	+\$2.42M	+7.8%	52.06M	-2.64M	-4.8%	\$0.65	+\$0.08
Red	\$7.47M	+\$0.38M	+5.4%	8.32M	+0.05M	+0.6%	\$0.90	+\$0.04
Yellow	\$6.13M	+\$1.18M	+23.8%	6.92M	+1.01M	+17.0%	\$0.89	+\$0.05
Gourmet	\$5.42M	+\$0.57M	+11.8%	2.18M	+0.09M	+4.5%	\$2.49	+\$0.16
Convenience	\$2.33M	+\$0.35M	+17.6%	1.07M	+0.03M	+3.2%	\$2.17	+\$0.27
White	\$0.59M	+\$0.11M	+23.7%	0.55M	+0.05M	+9.1%	\$1.06	+\$0.12

### All Varieties by Volume



### Top 10 Items: All Varieties



# 2022 Q1: Mountain Division

## Rising Prices Does not Slow Russet Growth

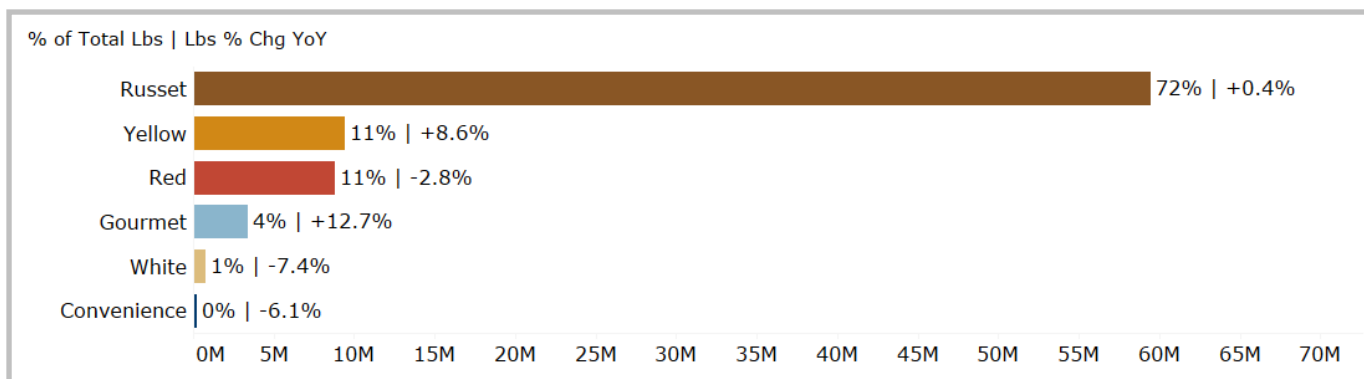
In Q1 2022, total russet dollars in the Mountain division were up +11.7%, while volume was up +0.4%. The top three varieties in this division were up in Q1 dollar and volume sales compared to 2021.

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 +5.7% compared to year ago.

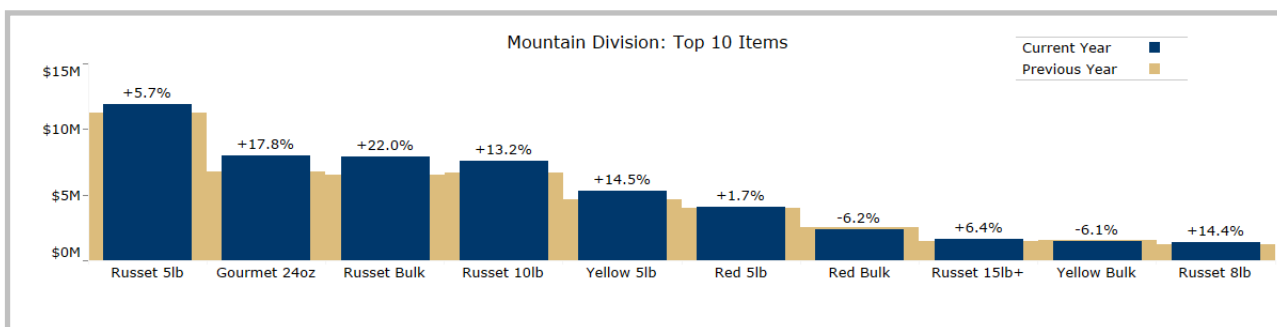
### Q1 Performance: All Varieties

	Dollars	\$ Chg vs LY	\$ % Chg YoY	Volume (Lbs)	Vol. Chg vs LY	Vol. % Chg YoY	Avg Price/Lb	Price Per Lb Chg
<b>Grand Total</b>	<b>\$56.94M</b>	<b>+\$5.57M</b>	<b>+10.8%</b>	<b>82.12M</b>	<b>+1.01M</b>	<b>+1.3%</b>	<b>\$0.69</b>	<b>+\$0.06</b>
Russet	\$31.16M	+\$3.27M	+11.7%	59.50M	+0.22M	+0.4%	\$0.52	+\$0.05
Yellow	\$8.35M	+\$0.85M	+11.3%	9.40M	+0.74M	+8.6%	\$0.89	+\$0.02
Gourmet	\$8.14M	+\$1.35M	+19.9%	3.41M	+0.38M	+12.7%	\$2.39	+\$0.14
Red	\$7.71M	+\$0.07M	+0.9%	8.82M	-0.25M	-2.8%	\$0.87	+\$0.03
White	\$1.03M	+\$0.03M	+3.0%	0.74M	-0.06M	-7.4%	\$1.39	+\$0.14
Convenience	\$0.56M	+\$0.00M	-0.4%	0.25M	-0.02M	-6.1%	\$2.28	+\$0.13

### All Varieties by Volume



### Top 10 Items: All Varieties





# 2022 Q1: New England Division

## Russets and Yellows Gain in Q1 Dollars

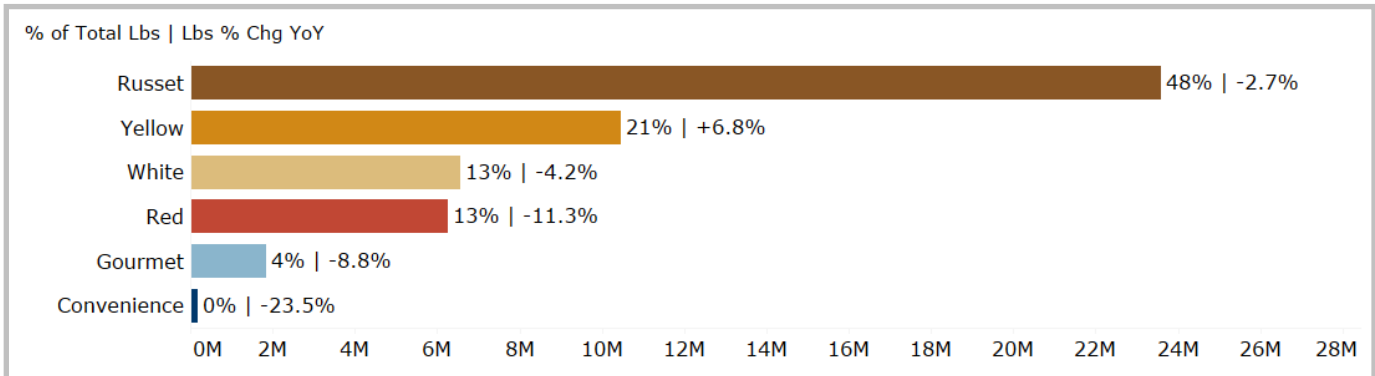
In Q1 2022, total russet dollars in the New England division were up +2.7%, while volume was down -2.7%. Yellows are up in dollars and volume sold compared to Q1 2021.

5lb bags are the top selling pack size in the New England division overall, carrying 58% of total potato volume. Of the 5lb pack sizes, the russet 5lb item is the top selling item in the division, posting a dollar increase of +1.0% compared to year ago.

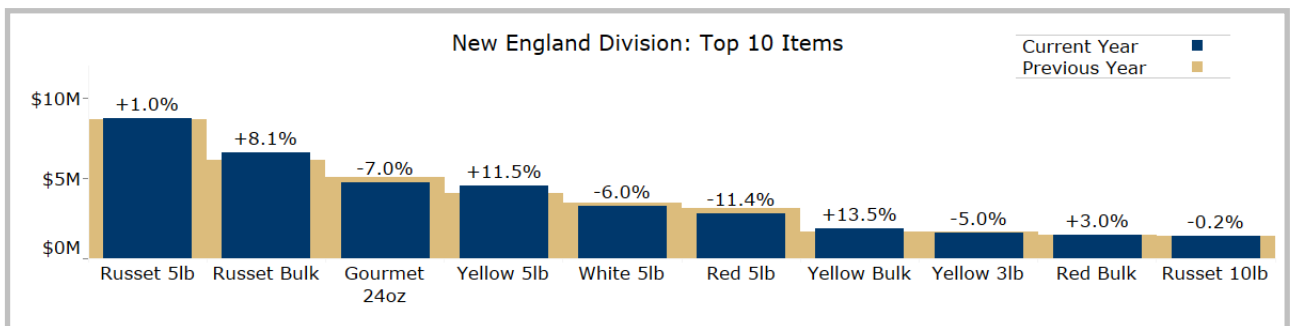
### Q1 Performance: All Varieties

	Dollars	\$ Chg vs LY	\$ % Chg YoY	Volume (Lbs)	Vol. Chg vs LY	Vol. % Chg YoY	Avg Price/Lb	Price Per Lb Chg
<b>Grand Total</b>	<b>\$44.23M</b>	<b>+\$1.12M</b>	<b>+2.6%</b>	<b>48.90M</b>	<b>-1.30M</b>	<b>-2.6%</b>	<b>\$0.90</b>	<b>+\$0.05</b>
Russet	\$18.37M	+\$0.48M	+2.7%	23.59M	-0.65M	-2.7%	\$0.78	+\$0.04
Yellow	\$9.72M	+\$0.94M	+10.7%	10.46M	+0.67M	+6.8%	\$0.93	+\$0.03
Red	\$6.51M	-\$0.02M	-0.3%	6.26M	-0.79M	-11.3%	\$1.04	+\$0.11
Gourmet	\$4.92M	-\$0.16M	-3.2%	1.85M	-0.18M	-8.8%	\$2.65	+\$0.16
White	\$4.26M	-\$0.06M	-1.3%	6.56M	-0.29M	-4.2%	\$0.65	+\$0.02
Convenience	\$0.46M	-\$0.07M	-12.5%	0.18M	-0.06M	-23.5%	\$2.60	+\$0.33

### All Varieties by Volume



### Top 10 Items: All Varieties



# 2022 Q1: Pacific Division

## Yellows Gain in Q1, While Reds Fall Behind

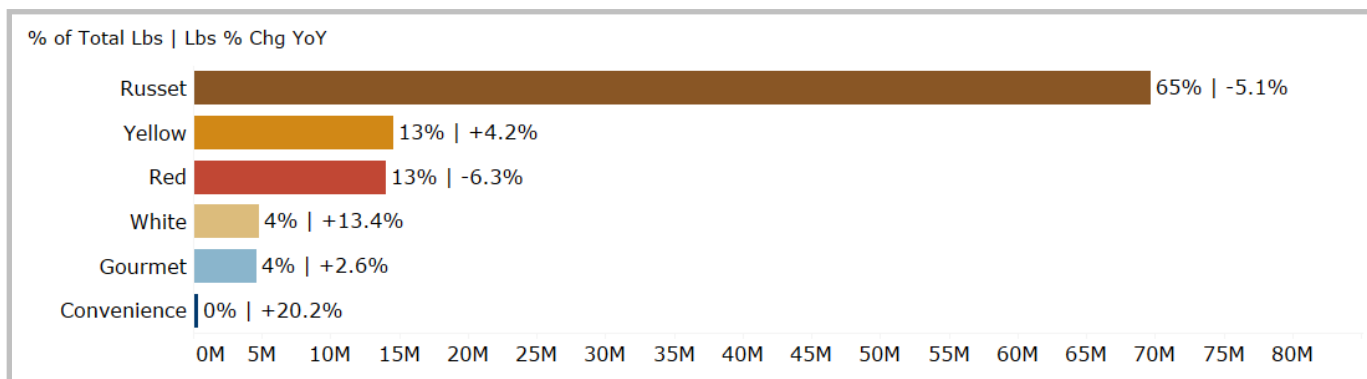
In Q1 2022, total russet dollars in the Pacific division were up +5.6%, while volume was down -5.1%. Russets and gourmets are the only varieties up in dollars and volume sold compared to 2021.

5lb bags are the top selling pack size in the Pacific division overall, carrying 40% of total potato volume. Of the 5lb pack sizes, russet bulks are the top selling item in the division, posting a dollar increase of +8.8% compared to year ago.

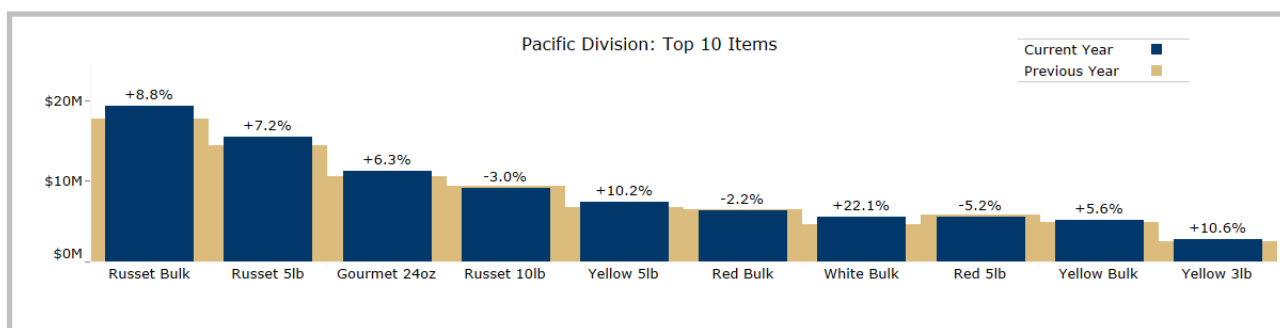
### Q1 Performance: All Varieties

	Dollars	\$ Chg vs LY	\$ % Chg YoY	Volume (Lbs)	Vol. Chg vs LY	Vol. % Chg YoY	Avg Price/Lb	Price Per Lb Chg
<b>Grand Total</b>	<b>\$94.94M</b>	<b>+\$5.79M</b>	<b>+6.5%</b>	<b>108.06M</b>	<b>-3.40M</b>	<b>-3.0%</b>	<b>\$0.88</b>	<b>+\$0.08</b>
Russet	\$46.43M	+\$2.47M	+5.6%	69.74M	-3.76M	-5.1%	\$0.67	+\$0.07
Yellow	\$16.02M	+\$1.33M	+9.1%	14.58M	+0.59M	+4.2%	\$1.10	+\$0.05
Red	\$14.29M	-\$0.18M	-1.2%	14.08M	-0.95M	-6.3%	\$1.02	+\$0.05
Gourmet	\$11.54M	+\$0.95M	+9.0%	4.58M	+0.12M	+2.6%	\$2.52	+\$0.15
White	\$5.95M	+\$1.15M	+24.0%	4.76M	+0.56M	+13.4%	\$1.25	+\$0.11
Convenience	\$0.71M	+\$0.06M	+9.8%	0.33M	+0.06M	+20.2%	\$2.15	-\$0.20

### All Varieties by Volume



### Top 10 Items: All Varieties



# 2022 Q1: South Atlantic Division

## Russets Gain, Even With Rising Prices

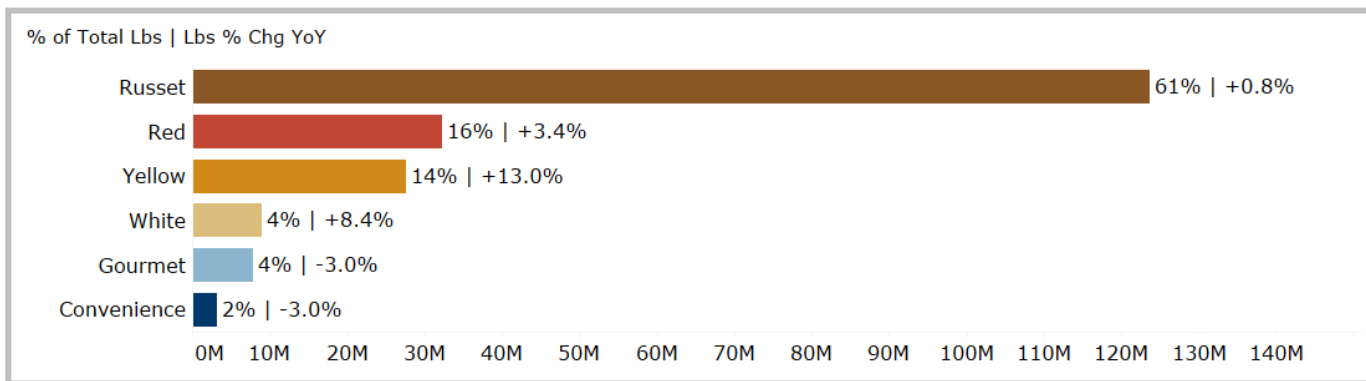
In Q1 2022, total russet dollars in the South Atlantic division were up +9.4%, while volume was up +0.8%. All but two variety groups are up in year-over-year dollar and volume sales.

5lb bags are the top selling pack size in the South Atlantic division overall, carrying 49% 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 +2.1% compared to year ago.

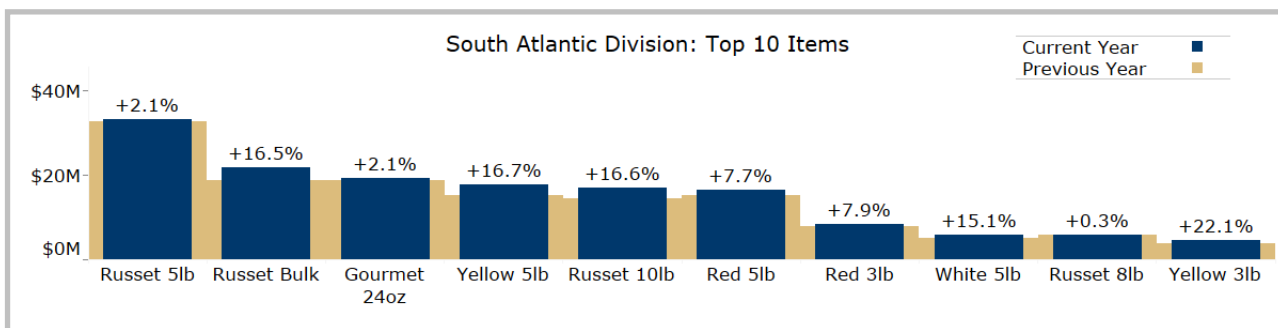
### Q1 Performance: All Varieties

	Dollars	\$ Chg vs LY	\$ % Chg YoY	Volume (Lbs)	Vol. Chg vs LY	Vol. % Chg YoY	Avg Price/Lb	Price Per Lb Chg
<b>Grand Total</b>	<b>\$182.01M</b>	<b>+\$16.66M</b>	<b>+10.1%</b>	<b>203.80M</b>	<b>+5.56M</b>	<b>+2.8%</b>	<b>\$0.89</b>	<b>+\$0.06</b>
Russet	\$89.09M	+\$7.65M	+9.4%	123.72M	+0.98M	+0.8%	\$0.72	+\$0.06
Red	\$31.71M	+\$2.56M	+8.8%	32.34M	+1.06M	+3.4%	\$0.98	+\$0.05
Yellow	\$26.44M	+\$4.26M	+19.2%	27.55M	+3.16M	+13.0%	\$0.96	+\$0.05
Gourmet	\$19.45M	+\$0.62M	+3.3%	7.93M	-0.24M	-3.0%	\$2.45	+\$0.15
Convenience	\$8.16M	+\$0.80M	+10.9%	3.24M	-0.10M	-3.0%	\$2.52	+\$0.32
White	\$7.16M	+\$0.77M	+12.1%	9.02M	+0.70M	+8.4%	\$0.79	+\$0.03

### All Varieties by Volume



### Top 10 Items: All Varieties



# 2022 Q1: West North Central Division

## Yellows Stand Out in Dollar and Volume Q1 Growth

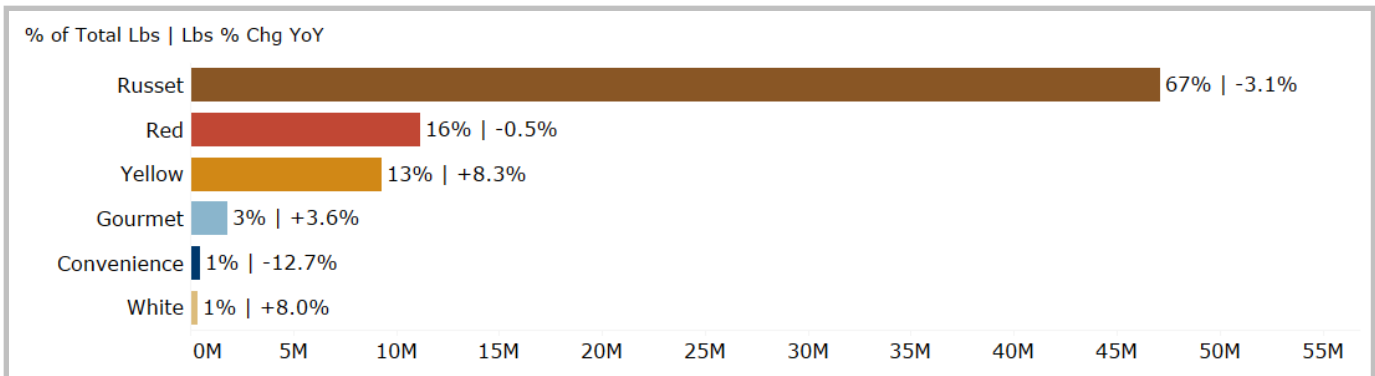
In Q1 2022, total russet dollars in the W.N. Central division were up +7.9%, while volume was down -3.1%. 3 of the 6 variety groups outperformed Q1 2021 in volume and dollar sales.

5lb bags are the top selling pack size in the W.N. Central division overall, carrying 58% 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 +8.3% compared to year ago.

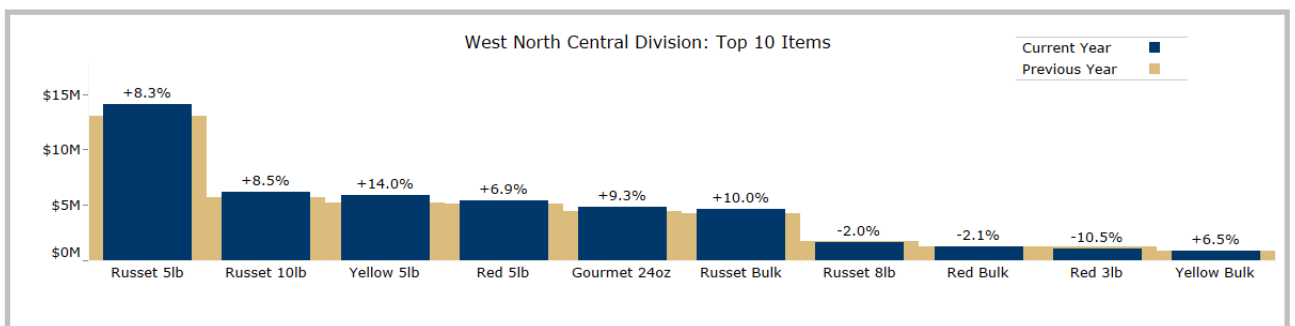
### Q1 Performance: All Varieties

	Dollars	\$ Chg vs LY	\$ % Chg YoY	Volume (Lbs)	Vol. Chg vs LY	Vol. % Chg YoY	Avg Price/Lb	Price Per Lb Chg
<b>Grand Total</b>	<b>\$51.19M</b>	<b>+\$3.68M</b>	<b>+7.8%</b>	<b>70.33M</b>	<b>-0.85M</b>	<b>-1.2%</b>	<b>\$0.73</b>	<b>+\$0.06</b>
Russet	\$27.90M	+\$2.04M	+7.9%	47.11M	-1.52M	-3.1%	\$0.59	+\$0.06
Red	\$8.70M	+\$0.22M	+2.6%	11.20M	-0.06M	-0.5%	\$0.78	+\$0.02
Yellow	\$8.27M	+\$1.03M	+14.2%	9.31M	+0.71M	+8.3%	\$0.89	+\$0.05
Gourmet	\$4.87M	+\$0.44M	+10.0%	1.82M	+0.06M	+3.6%	\$2.67	+\$0.15
Convenience	\$1.00M	-\$0.10M	-8.9%	0.50M	-0.07M	-12.7%	\$1.99	+\$0.08
White	\$0.45M	+\$0.05M	+11.9%	0.38M	+0.03M	+8.0%	\$1.19	+\$0.04

### All Varieties by Volume



### Top 10 Items: All Varieties





# 2022 Q1: West South Central Division

## Russet 5lb Jump in Q1 Sales

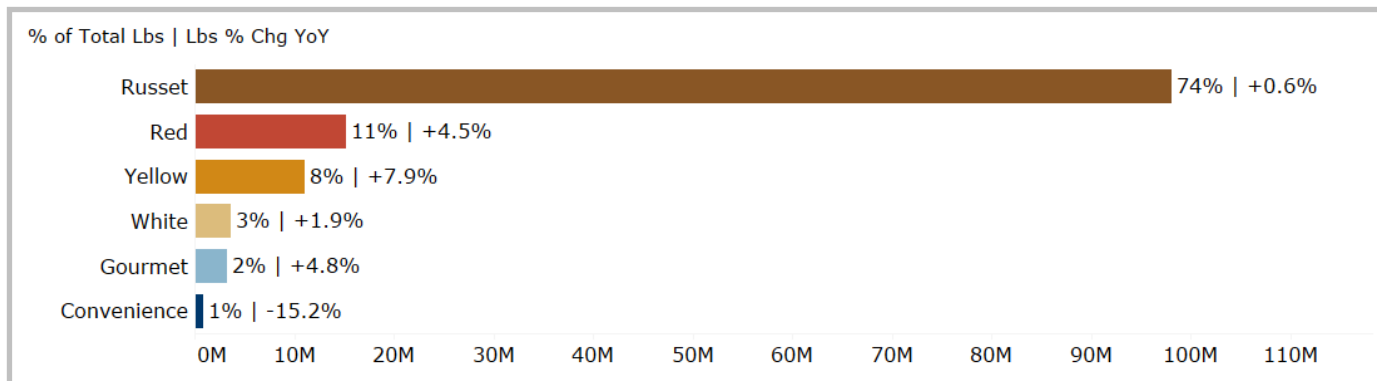
In Q1 2022, total russet dollars in the W.S. Central division were up +10.0%, while volume was up +0.6%. With the exception of convenience, all varieties are up in volume and dollar sales year-over-year.

5lb bags are the top selling pack size in the W.S. Central division overall, carrying 41% 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 +10.8% compared to year ago.

### Q1 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
<b>Grand Total</b>	<b>\$92.45M</b>	<b>+\$9.21M</b>	<b>+11.1%</b>	<b>132.19M</b>	<b>+2.05M</b>	<b>+1.6%</b>	<b>\$0.70</b>	<b>+\$0.06</b>
Russet	\$54.04M	+\$4.93M	+10.0%	98.06M	+0.54M	+0.6%	\$0.55	+\$0.05
Red	\$13.71M	+\$0.87M	+6.7%	15.20M	+0.65M	+4.5%	\$0.90	+\$0.02
Yellow	\$9.47M	+\$1.35M	+16.7%	11.01M	+0.81M	+7.9%	\$0.86	+\$0.06
Gourmet	\$8.68M	+\$1.08M	+14.2%	3.30M	+0.15M	+4.8%	\$2.63	+\$0.22
White	\$4.81M	+\$1.18M	+32.6%	3.68M	+0.07M	+1.9%	\$1.31	+\$0.30
Convenience	\$1.73M	-\$0.20M	-10.6%	0.93M	-0.17M	-15.2%	\$1.85	+\$0.09

### All Varieties by Volume



### Top 10 Items: All Varieties

