



2023 Q2

Potato Category Review

Idaho Potato Commission

2023 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 April 3 - July 1, 2023 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 IQ. Nielsen reports 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. Microwaveable
 - » Gourmet: Specialty potatoes 24oz pack size; including Fingerling, Baby, or Mixed
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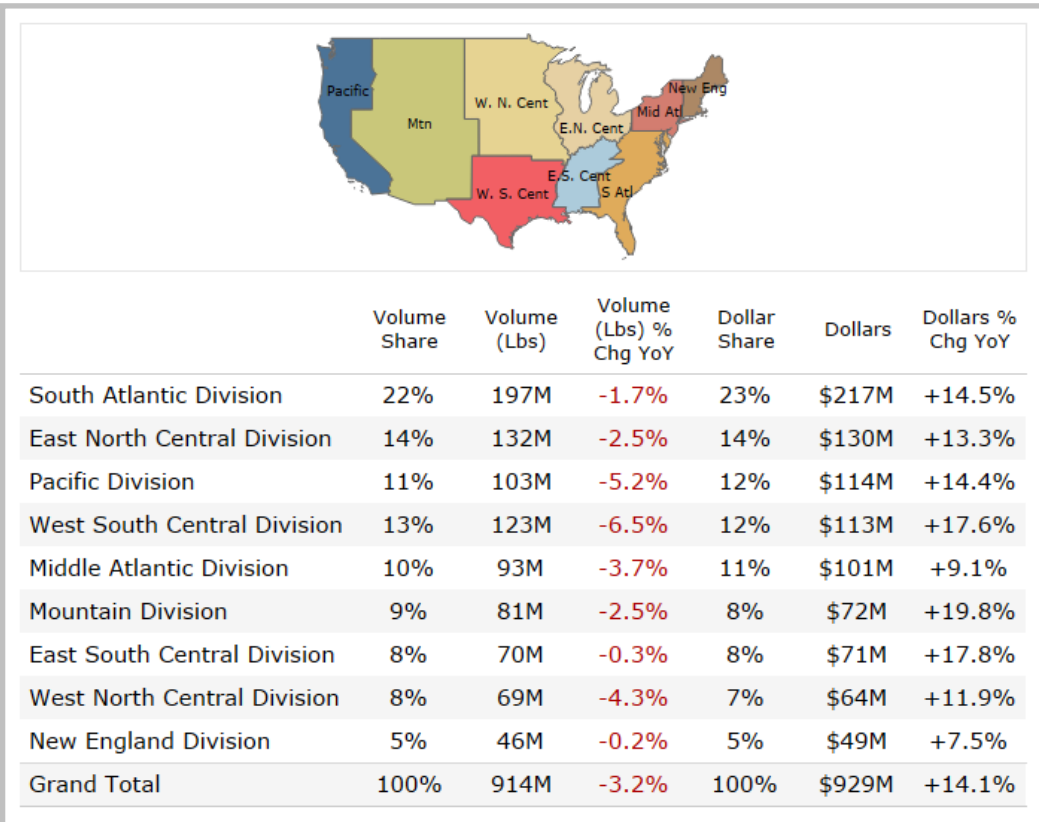
2023 Q2: Total US

Pacific Division Leads in Q2 Dollar Growth

All nine divisions gained in dollars at retail in Q2. As a category total, potatoes posted dollar growth this quarter of +14.1%.

In the Total US, 5lb russets are the top performing variety and continue to gain dollar and volume share every year. In 2023 Q2, the pack size grew +23.9% in dollars over the same period last year.

Yellow potatoes continued to gain share over reds in Q2. Compared to Q2 2022, yellows have gained 1.2% volume share while reds have decreased by 0.7% volume share.



Planning for 2023 Holiday Promotions

In November and December 2022, 5lb russets gained +39.9% in dollars and +20.5% in volume, heavily influenced by emphasis on 5lb ads for the holidays. The potato category as a whole was up +22.6% in dollars and +2.0% in volume in those two months.

As you look towards your 2023 holiday promotions, consider Idaho potatoes as a category that will boost your department through the end of the

year. In November and December 2022, ads on potatoes were down -10.1% compared to 2021, led by russets with a -18.6% decrease. There is opportunity to increase ads this holiday season.

With help from your IPC retail promotion directors, utilizing data and promotion strategies can help produce managers evaluate how to utilize ads and secondary displays on potatoes to lift your department.

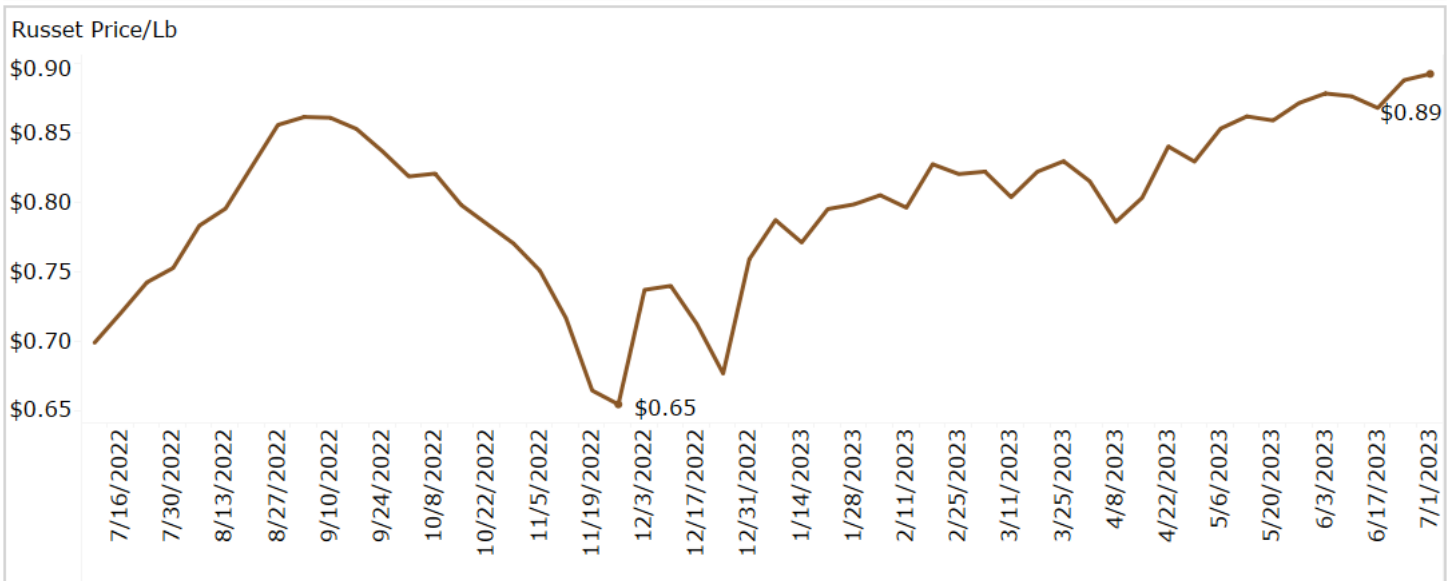
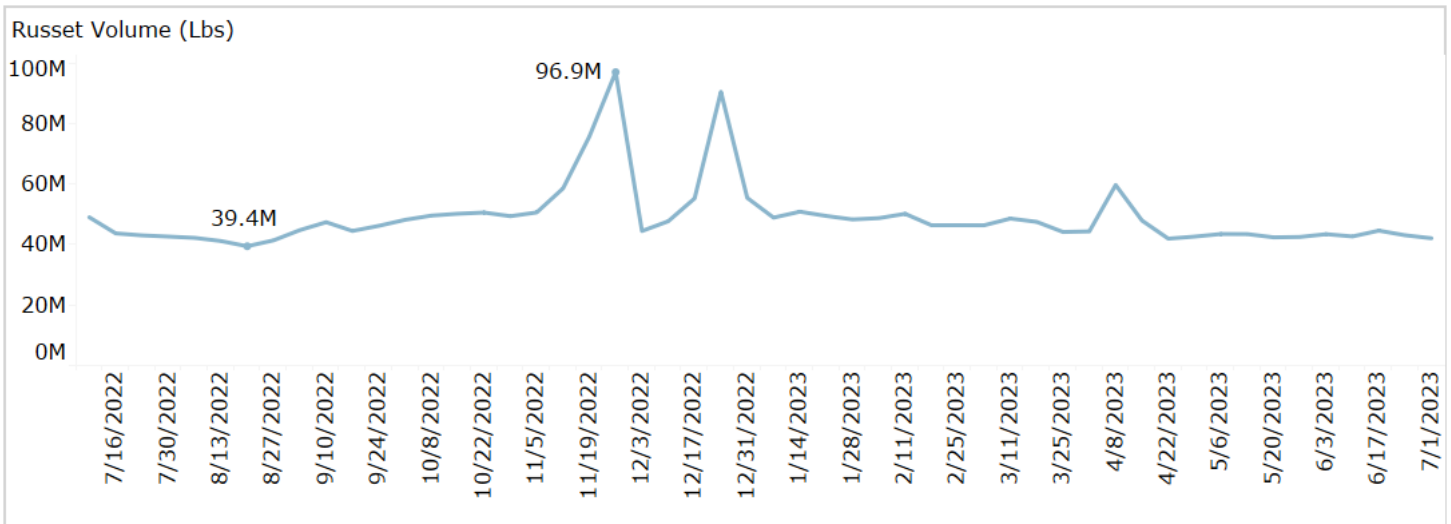


Q2 2023: Russet Pricing

Russet Volume Steady with Rising Prices

2022 holiday promotions pushed the average price/lb on Russets to its lowest of the year, but prices have been on the rise since. With inflation and supply constraints, prices wavered throughout the past 52 weeks.

However, Russet potatoes remain one of the most inelastic items in produce. Steady volume through the past year prove that consumers love Russet potatoes, even at a price increase. Potatoes continue to be one of the most cost-to-value beneficial categories for shoppers being hit with rising living costs.



2023 Q2: East North Central Division



Yellows Continue to Take Share from Reds

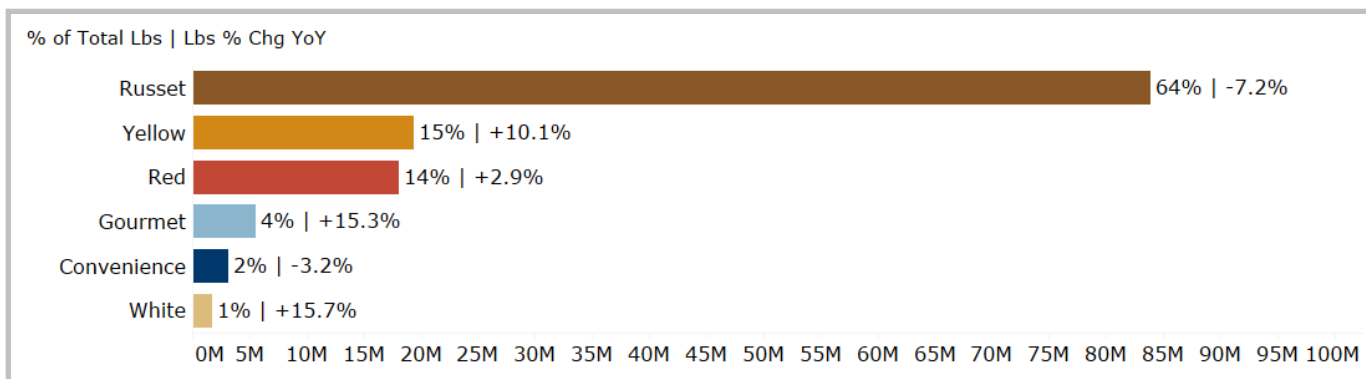
In Q2 2023, total Russet dollars in the E.N. Central division were up +16.7%, while volume was down -7.2%. With the exception of Russets and Convenience, all other varieties outperformed Q2 2022 in dollars and volume.

5lb bags are the top selling pack size in the E.N. Central division overall, carrying 53% of total potato volume. Of the 5lb pack sizes, Russet 5lb is the top selling item in the division, posting a dollar increase of +22.9% compared to last year.

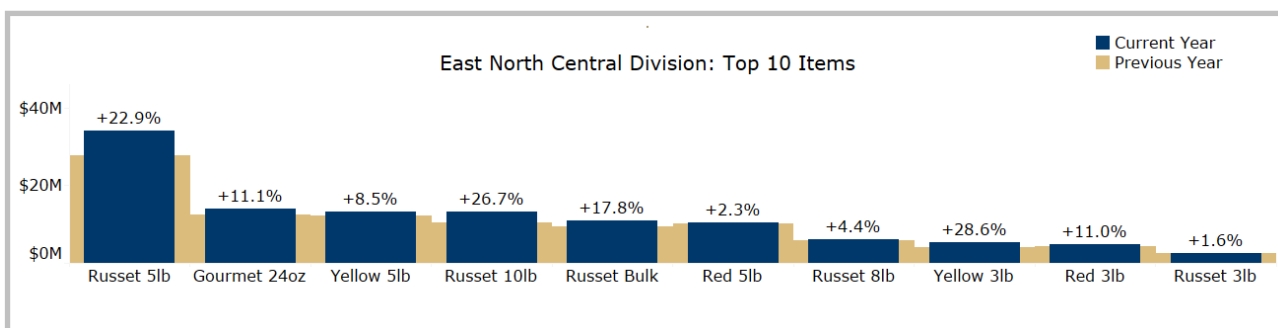
Q2 Performance: All Varieties

	Dollars	Dollars % Chg YoY	Volume (Lbs)	Volume (Lbs) % Chg YoY	Avg Price/Lb	Avg Price/Lb Chg YoY
Grand Total	\$129.6M	+13.3%	131.9M	-2.5%	\$0.98	+\$0.14
Russet	\$68.0M	+16.7%	83.9M	-7.2%	\$0.81	+\$0.17
Yellow	\$21.0M	+13.6%	19.4M	+10.1%	\$1.08	+\$0.03
Red	\$18.5M	+3.9%	18.1M	+2.9%	\$1.02	+\$0.01
Gourmet	\$13.9M	+11.1%	5.6M	+15.3%	\$2.49	-\$0.09
Convenience	\$6.2M	+10.1%	3.2M	-3.2%	\$1.94	+\$0.23
White	\$2.1M	+16.1%	1.7M	+15.7%	\$1.24	+\$0.00

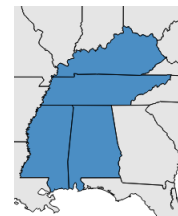
All Varieties by Volume



Top 10 Items: All Varieties



2023 Q2: East South Central Division



E.S.C. Division Outperforms Total US in Q2

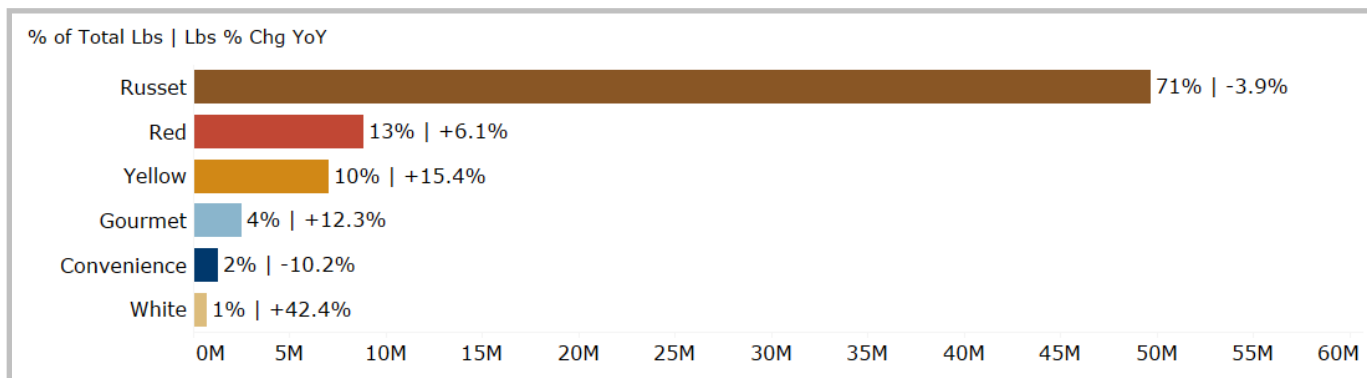
In Q2 2023, total Russet dollars in the E.S. Central division were up +20.3%, and volume fell -3.9%. Yellows had the greatest year-over-year growth with dollars up +26.5%.

5lb bags in the total category are the top selling pack size in the E.S. Central division overall, carrying 49% of total potato volume. Russet 5lb bags are the top selling item in the division, posting a dollar increase of +32.2% and a volume increase of +4.5% compared to year ago.

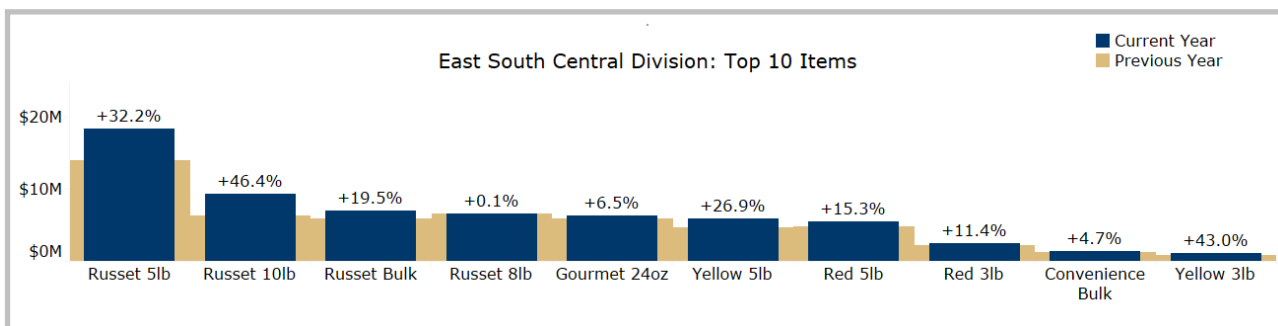
Q2 Performance: All Varieties

	Dollars	Dollars % Chg YoY	Volume (Lbs)	Volume (Lbs) % Chg YoY	Avg Price/Lb	Avg Price/Lb Chg YoY
Grand Total	\$71.0M	+17.8%	70.1M	-0.3%	\$1.01	+\$0.16
Russet	\$43.7M	+20.3%	49.7M	-3.9%	\$0.88	+\$0.18
Red	\$9.1M	+9.2%	8.8M	+6.1%	\$1.03	+\$0.03
Yellow	\$8.0M	+26.5%	7.1M	+15.4%	\$1.14	+\$0.10
Gourmet	\$6.2M	+6.5%	2.5M	+12.3%	\$2.48	-\$0.14
Convenience	\$2.8M	+0.1%	1.3M	-10.2%	\$2.20	+\$0.23
White	\$1.1M	+97.5%	0.7M	+42.4%	\$1.51	+\$0.42

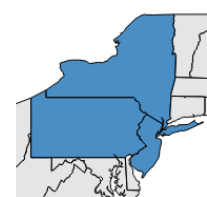
All Varieties by Volume



Top 10 Items: All Varieties



2023 Q2: Middle Atlantic Division



Yellows Lead in Division Gains

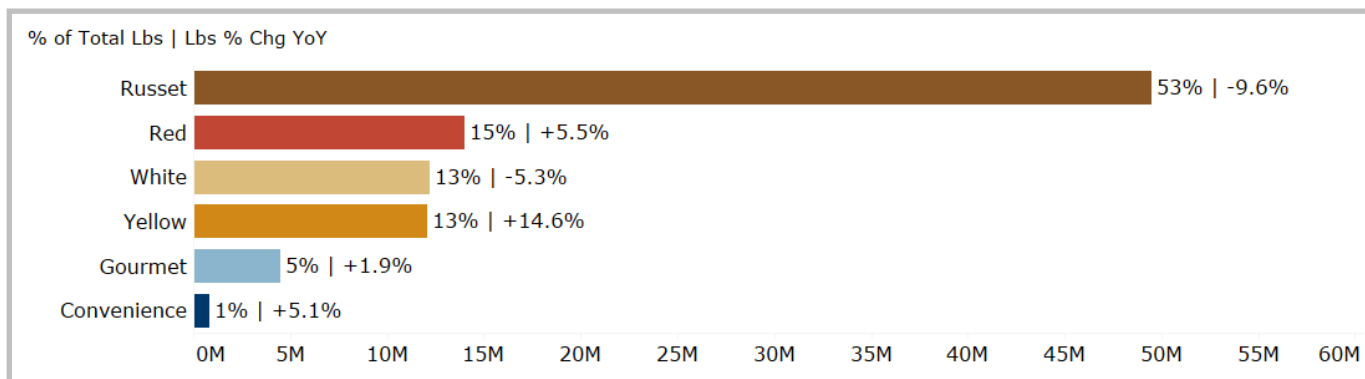
In Q2 2023, total Russet dollars in the Mid Atlantic division were up +8.8%, while volume was down -9.6%. Yellows, Reds, Gourmet, and Convenience were all up in volume and dollars this quarter compared to 2022.

5lb bags in the total category are the top selling pack size in the Mid Atlantic division overall. They carry 59% of total potato volume, . Of the 5lb pack sizes, Russet 5lb bags are the top selling item in the Mid Atlantic division, posting a dollar increase of over +7.0% compared to Q2 2022.

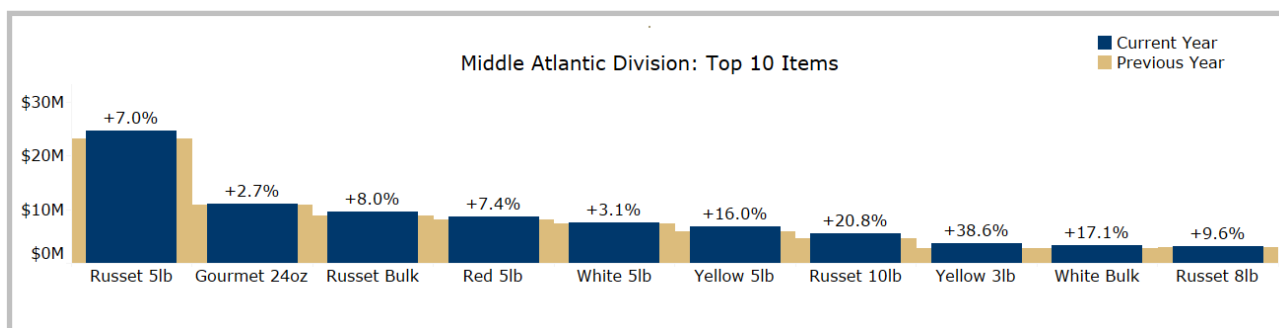
Q2 Performance: All Varieties

	Dollars	Dollars % Chg YoY	Volume (Lbs)	Volume (Lbs) % Chg YoY	Avg Price/Lb	Avg Price/Lb Chg YoY
Grand Total	\$100.6M	+9.1%	93.1M	-3.7%	\$1.08	+\$0.13
Russet	\$44.5M	+8.8%	49.5M	-9.6%	\$0.90	+\$0.15
Red	\$16.4M	+7.7%	14.0M	+5.5%	\$1.17	+\$0.02
Yellow	\$14.7M	+18.7%	12.1M	+14.6%	\$1.22	+\$0.04
White	\$11.5M	+5.8%	12.2M	-5.3%	\$0.94	+\$0.10
Gourmet	\$11.0M	+2.7%	4.5M	+1.9%	\$2.45	+\$0.02
Convenience	\$2.5M	+17.5%	0.8M	+5.1%	\$3.07	+\$0.32

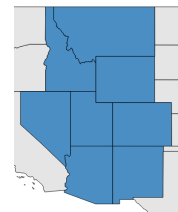
All Varieties by Volume



Top 10 Items: All Varieties



2023 Q2: Mountain Division



Russets Surpass 30% Dollar Growth

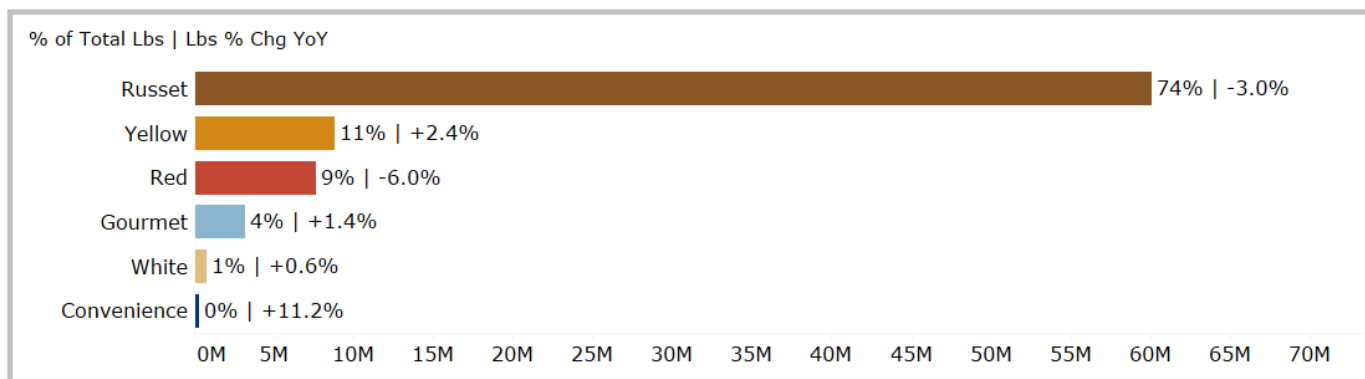
In Q2 2023, total Russet dollars in the Mountain division were up +30.1%, while volume was down -3.0%. While the Mountain division makes up just 9% of total volume in the US, it surpasses Total US in both dollar and volume year-over-year growth in Q2.

5lb bags in the category total are the top selling pack size in the Mountain division overall, carrying 47% of total potato volume. 5lb Russets are the top performing item in this division, up +41.0% in dollars and +2.4% in volume in Q2.

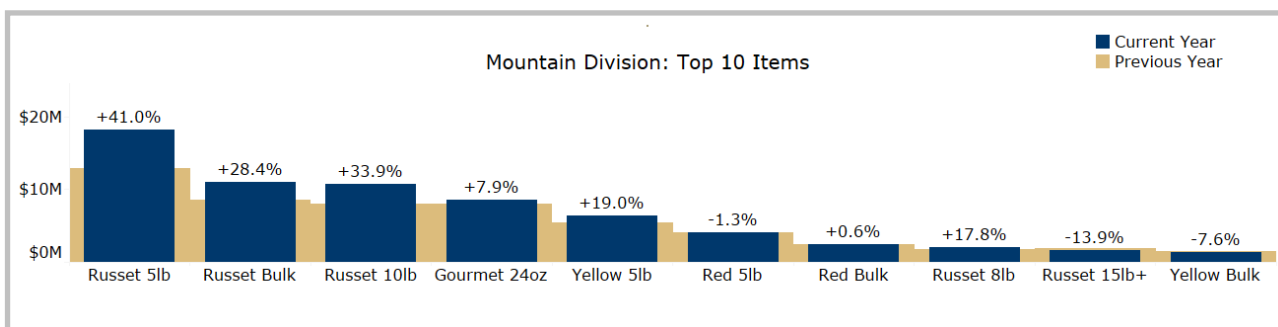
Q2 Performance: All Varieties

	Dollars	Dollars % Chg YoY	Volume (Lbs)	Volume (Lbs) % Chg YoY	Avg Price/Lb	Avg Price/Lb Chg YoY
Grand Total	\$72.5M	+19.8%	80.9M	-2.5%	\$0.90	+\$0.17
Russet	\$44.2M	+30.1%	60.1M	-3.0%	\$0.73	+\$0.19
Yellow	\$9.8M	+10.0%	8.8M	+2.4%	\$1.11	+\$0.08
Gourmet	\$8.6M	+7.9%	3.2M	+1.4%	\$2.70	+\$0.16
Red	\$8.3M	+0.7%	7.6M	-6.0%	\$1.08	+\$0.07
White	\$1.0M	+7.1%	0.8M	+0.6%	\$1.30	+\$0.08
Convenience	\$0.7M	+17.4%	0.3M	+11.2%	\$2.26	+\$0.12

All Varieties by Volume



Top 10 Items: All Varieties



2023 Q2: New England Division



Yellows and Reds Continue to Grow

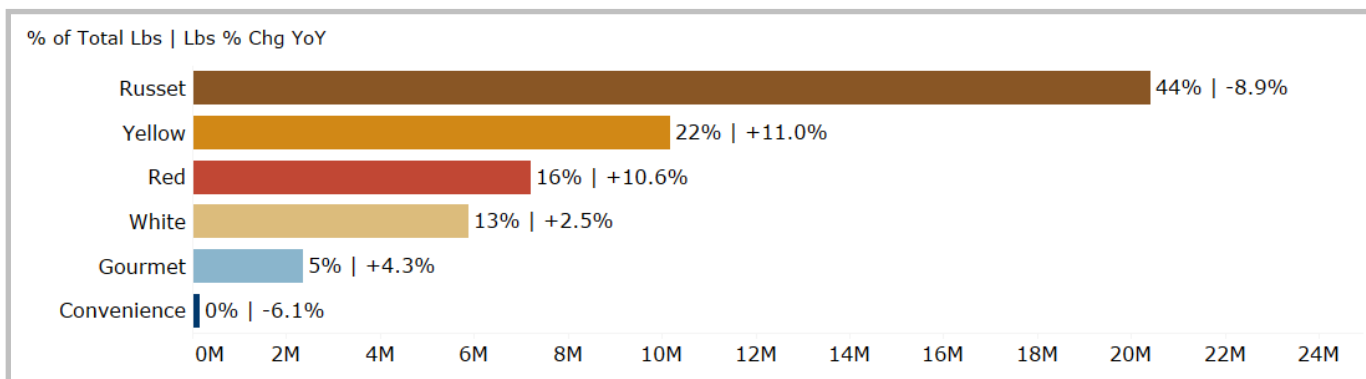
In Q2 2023, total Russet dollars in the New England division were up +5.0%, while volume was down -8.9%. Yellows and Reds are up in volume in this division, at +11.0% and +10.6%.

5lb bags and bulk are the top selling pack sizes in the New England division overall, carrying 58% and 18% of total potato volume, respectively. In Russets, the 5lb bag is the best selling pack size, although posting minor Q2 gains of 0.2% in dollar sales over the prior year.

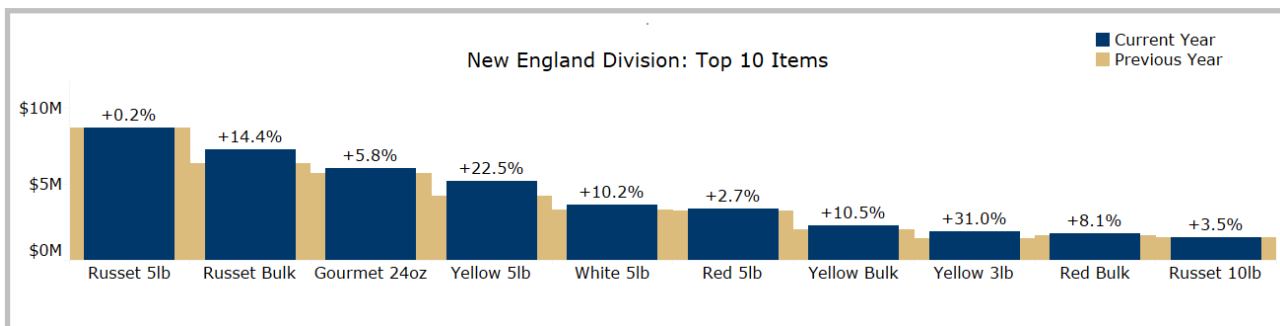
Q2 Performance: All Varieties

	Dollars	Dollars % Chg YoY	Volume (Lbs)	Volume (Lbs) % Chg YoY	Avg Price/Lb	Avg Price/Lb Chg YoY
Grand Total	\$48.7M	+7.5%	46.2M	-0.2%	\$1.05	+\$0.08
Russet	\$18.9M	+5.0%	20.4M	-8.9%	\$0.93	+\$0.12
Yellow	\$11.0M	+15.8%	10.2M	+11.0%	\$1.08	+\$0.04
Red	\$7.6M	+7.6%	7.2M	+10.6%	\$1.05	-\$0.03
Gourmet	\$6.1M	+5.8%	2.4M	+4.3%	\$2.55	+\$0.04
White	\$4.6M	+1.2%	5.9M	+2.5%	\$0.78	-\$0.01
Convenience	\$0.5M	+16.7%	0.2M	-6.1%	\$3.24	+\$0.63

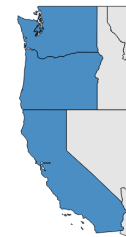
All Varieties by Volume



Top 10 Items: All Varieties



2023 Q2: Pacific Division



Bulk Continues to Lead in Dollars

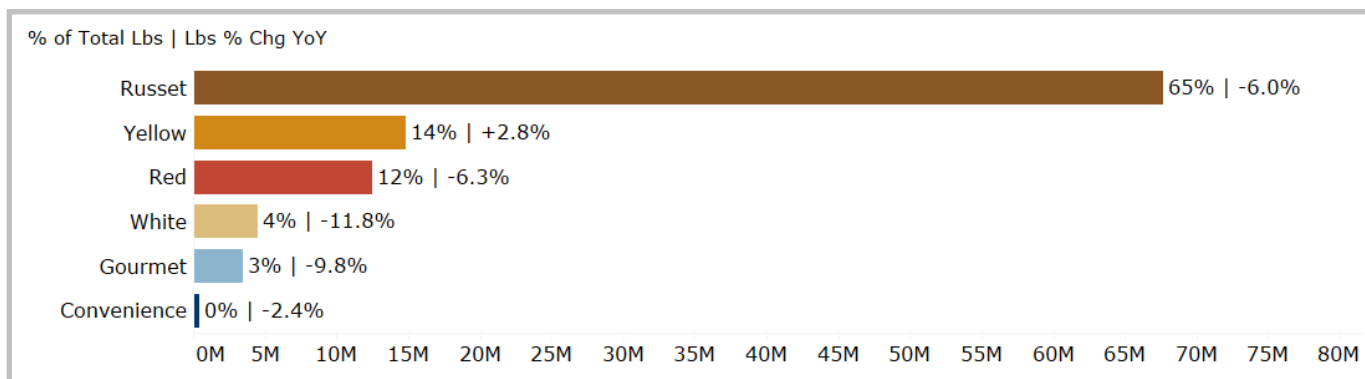
In Q2 2023, total Russet dollars in the Pacific division were up +24.3%, while volume was down -6.0%. Yellow 5lb potatoes saw the greatest volume increase among all varieties in the division, at +9.2%.

Bulk potatoes are the preferred way consumers shop the category in the Pacific division dollars, carrying 30% of total potato volume. Among Russets, bulks are the top selling item in the division, posting a dollar increase of +26.3% compared to year ago. The Pacific is the only division in Q2 with bulk Russets outperforming 5lb bags.

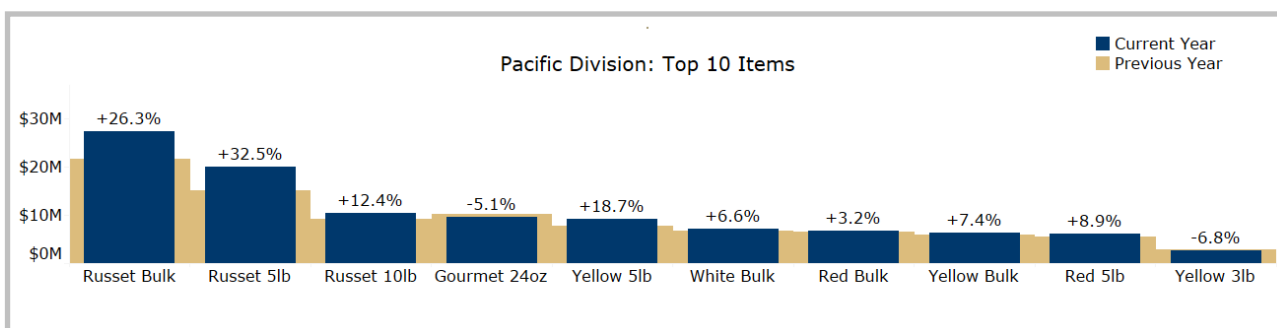
Q2 Performance: All Varieties

	Dollars	Dollars % Chg YoY	Volume (Lbs)	Volume (Lbs) % Chg YoY	Avg Price/Lb	Avg Price/Lb Chg YoY
Grand Total	\$113.8M	+14.4%	103.4M	-5.2%	\$1.10	+\$0.19
Russet	\$61.1M	+24.3%	67.7M	-6.0%	\$0.90	+\$0.22
Yellow	\$19.5M	+11.4%	14.9M	+2.8%	\$1.31	+\$0.10
Red	\$15.5M	+3.6%	12.5M	-6.3%	\$1.25	+\$0.12
Gourmet	\$9.6M	-5.1%	3.4M	-9.8%	\$2.80	+\$0.14
White	\$7.2M	+3.7%	4.5M	-11.8%	\$1.60	+\$0.24
Convenience	\$0.9M	+10.4%	0.4M	-2.4%	\$2.19	+\$0.26

All Varieties by Volume



Top 10 Items: All Varieties



2023 Q2: South Atlantic Division



The South Atlantic Loves Red Potatoes

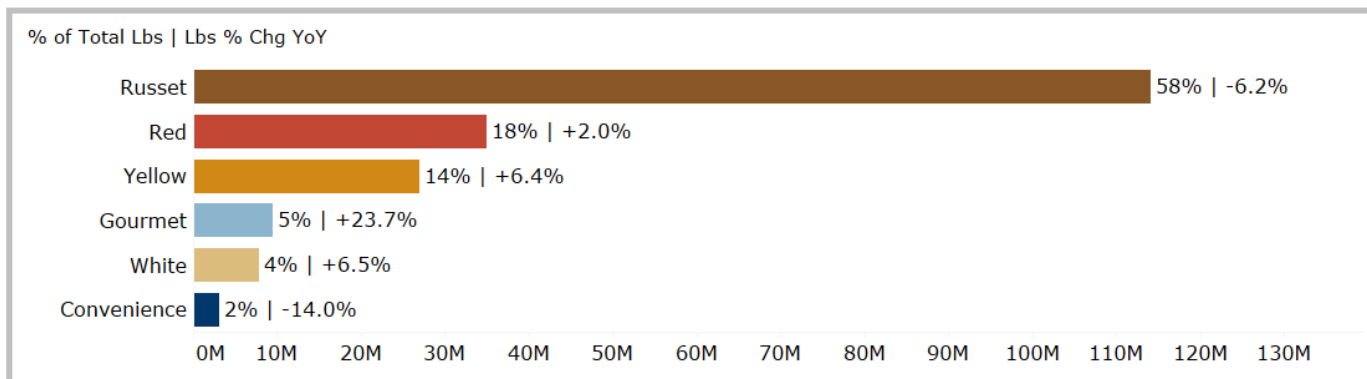
In Q2 2023, total Russet dollars in the South Atlantic division were up +17.6%, while volume was down -6.2%. When compared with other regions, Red potatoes have a stronghold in the South Atlantic division. The region represents 27% of total volume and 26% in dollar share of Red potatoes in the total US.

Total 5lb bags are the top selling pack size in the South Atlantic division overall, carrying 42% of total potato volume.

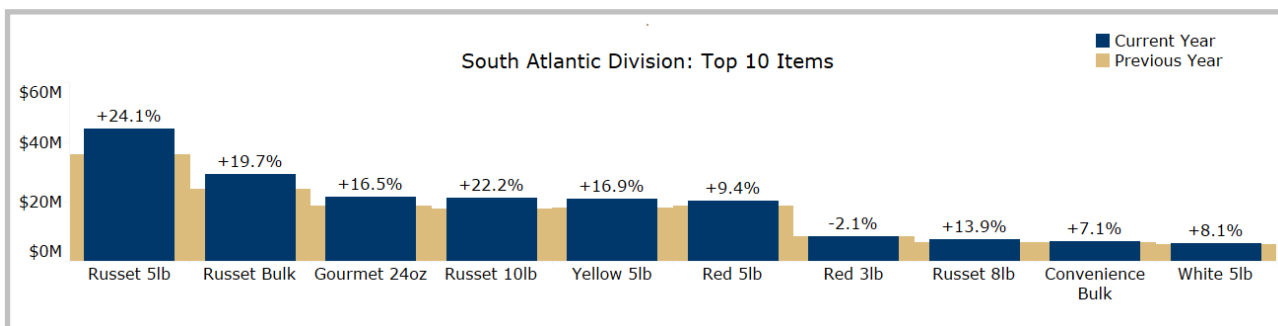
Q2 Performance: All Varieties

	Dollars	Dollars % Chg YoY	Volume (Lbs)	Volume (Lbs) % Chg YoY	Avg Price/Lb	Avg Price/Lb Chg YoY
Grand Total	\$216.8M	+14.5%	196.5M	-1.7%	\$1.10	+\$0.16
Russet	\$109.8M	+17.6%	114.2M	-6.2%	\$0.96	+\$0.19
Red	\$36.3M	+5.9%	34.9M	+2.0%	\$1.04	+\$0.04
Yellow	\$31.4M	+15.6%	27.0M	+6.4%	\$1.16	+\$0.09
Gourmet	\$21.6M	+16.5%	9.4M	+23.7%	\$2.29	-\$0.14
White	\$9.0M	+30.2%	7.9M	+6.5%	\$1.14	+\$0.21
Convenience	\$8.8M	-3.0%	3.2M	-14.0%	\$2.76	+\$0.31

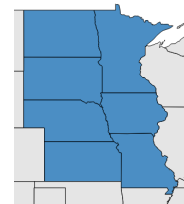
All Varieties by Volume



Top 10 Items: All Varieties



2023 Q2: West North Central Division



Yellow and Gourmet Potatoes Lead Volume Growth

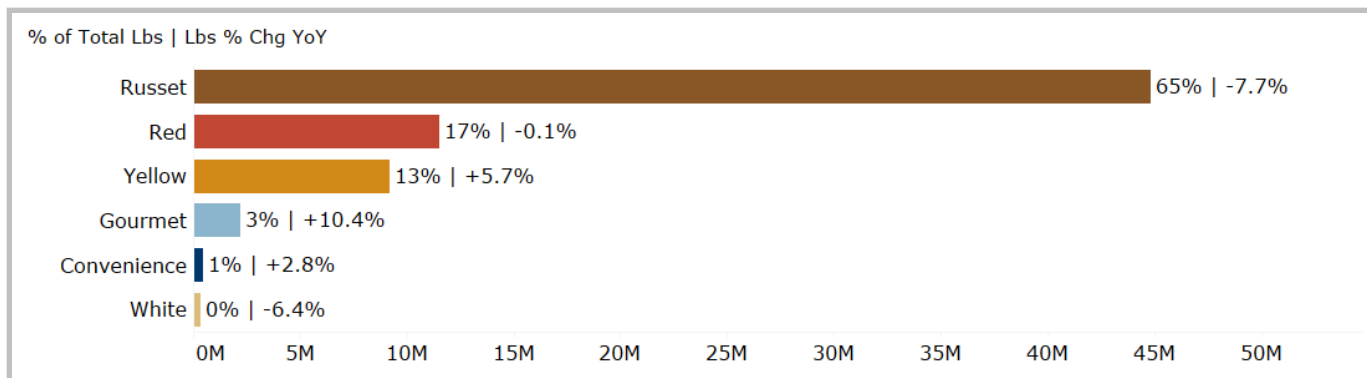
In Q2 2023, total Russet dollars in the W.N. Central division were up +17.8%, while volume was down - 7.7%. Yellows, Convenience and Gourmet all experienced dollar and volume increases this quarter.

Total 5lb bags are the top selling pack size in the W.N. Central division overall, carrying 60% of total potato volume. Of the 5lb pack sizes, Russet 5lb bags are the top selling item in the division, posting a dollar increase of +22.5% compared to 2022 Q2.

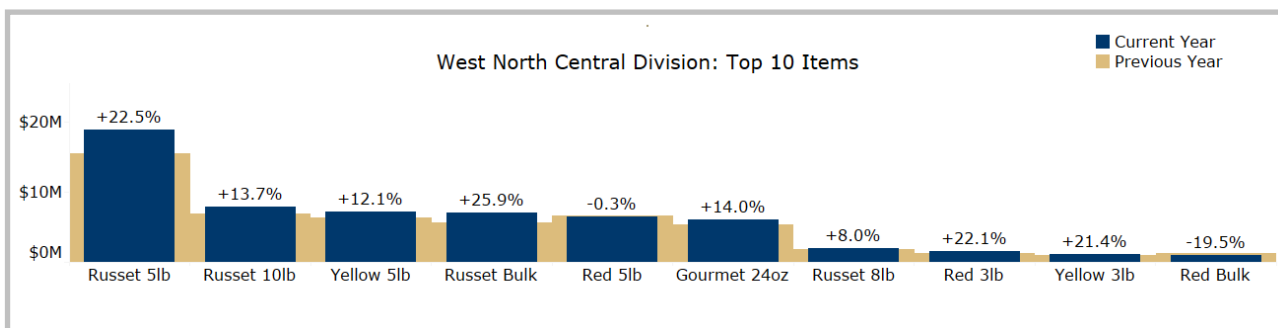
Q2 Performance: All Varieties

	Dollars	Dollars % Chg YoY	Volume (Lbs)	Volume (Lbs) % Chg YoY	Avg Price/Lb	Avg Price/Lb Chg YoY
Grand Total	\$63.8M	+11.9%	68.7M	-4.3%	\$0.93	+\$0.13
Russet	\$36.4M	+17.8%	44.9M	-7.7%	\$0.81	+\$0.18
Red	\$10.2M	-0.6%	11.5M	-0.1%	\$0.88	+\$0.00
Yellow	\$9.6M	+4.6%	9.2M	+5.7%	\$1.04	-\$0.01
Gourmet	\$6.1M	+14.0%	2.2M	+10.4%	\$2.70	+\$0.09
Convenience	\$1.1M	+16.6%	0.5M	+2.8%	\$2.27	+\$0.27
White	\$0.4M	-1.2%	0.3M	-6.4%	\$1.25	+\$0.07

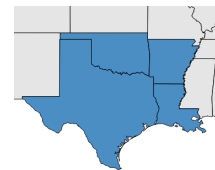
All Varieties by Volume



Top 10 Items: All Varieties



2023 Q2: West South Central Division



5lb Russets Remain Strong in Q2 Sales

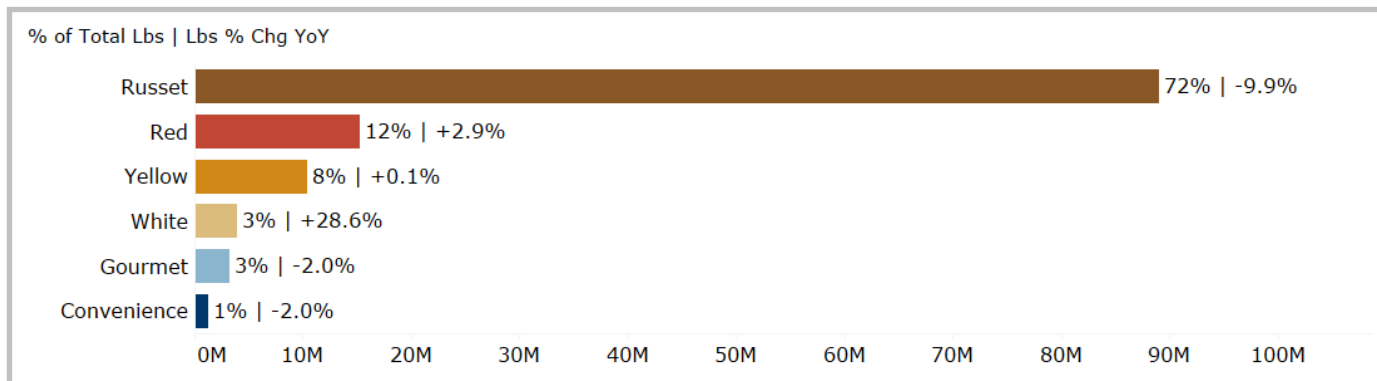
In Q2 2023, total Russet dollars in the W.S. Central division were up +23.9%, while volume was down -9.9%. While all varieties gained in Q2 dollar sales, Yellows, Reds, and Whites were the only varieties to gain in volume over the prior year.

5lb bags in the total category are the top selling pack size in the W.S. Central division overall, carrying 42% of total potato volume. Of the 5lb pack sizes, Russet 5lb bags are the top selling item in the division, posting a dollar increase of +33.1% compared to last year.

Q2 Performance: All Varieties

	Dollars	Dollars % Chg YoY	Volume (Lbs)	Volume (Lbs) % Chg YoY	Avg Price/Lb	Avg Price/Lb Chg YoY
Grand Total	\$112.5M	+17.6%	123.2M	-6.5%	\$0.91	+\$0.19
Russet	\$67.3M	+23.9%	89.1M	-9.9%	\$0.76	+\$0.21
Red	\$15.9M	+2.2%	15.3M	+2.9%	\$1.04	-\$0.01
Yellow	\$12.0M	+15.1%	10.4M	+0.1%	\$1.15	+\$0.15
Gourmet	\$8.9M	+0.9%	3.2M	-2.0%	\$2.80	+\$0.08
White	\$5.8M	+33.9%	3.9M	+28.6%	\$1.50	+\$0.06
Convenience	\$2.5M	+17.6%	1.3M	-2.0%	\$1.95	+\$0.32

All Varieties by Volume



Top 10 Items: All Varieties

