



2023 Q3

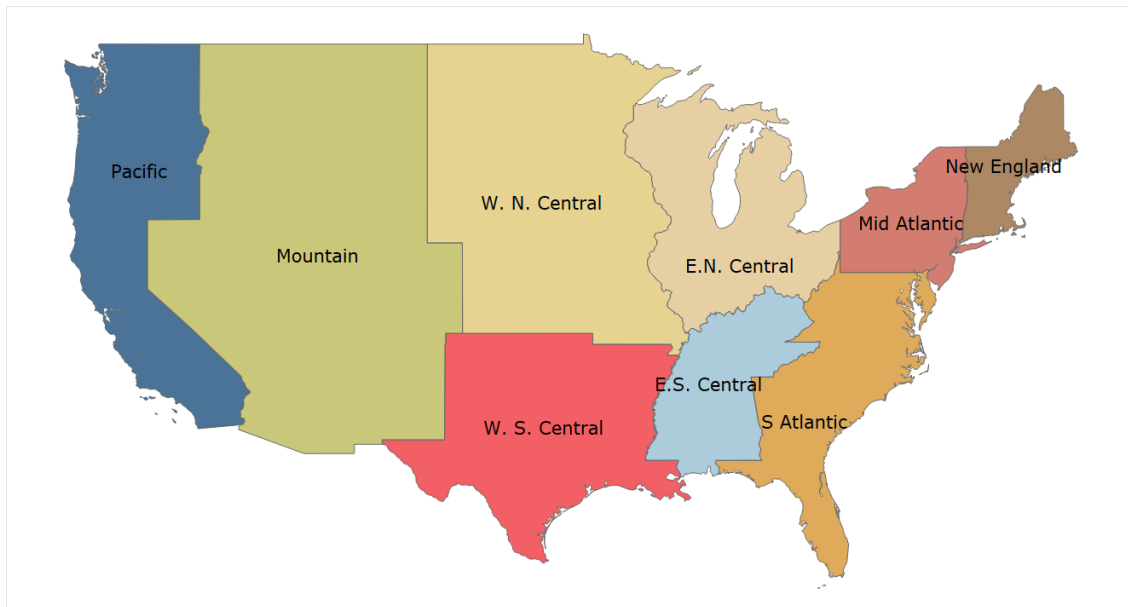
Potato Category Review

Idaho Potato Commission

2023 Q3 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 July 2 - September 30, 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 through retail channels. 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
- Data and charts in this report may be reproduced by recipients provided source attribution is used as follows: Source: Idaho Potato Commission and Category Partners, powered by Nielsen Total US Scan, July - September, 2023



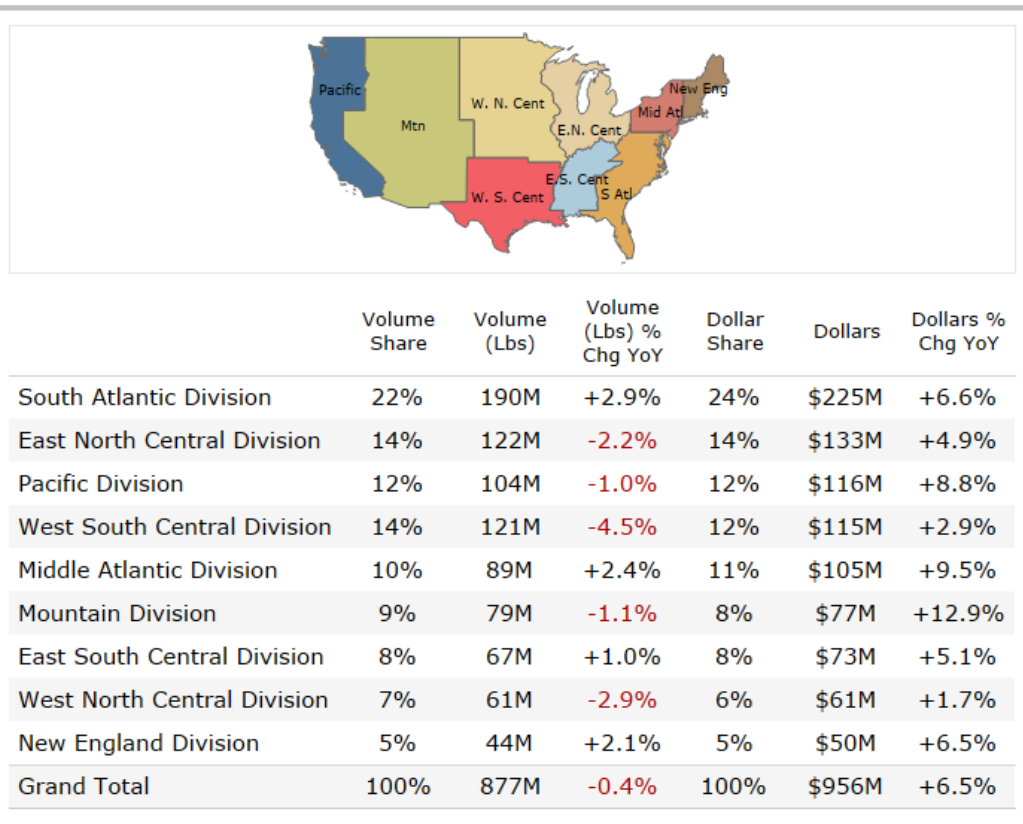
2023 Q3: Total US

Volume Sales Bounce Back with New Crop

All nine divisions grew in dollars at retail in Q3 over last year. As a category total, potatoes posted dollar growth this quarter of +6.6%.

In the Total US, 5lb russets were the top performing variety and continue to gain dollar and volume share every year. In 2023 Q3, the pack size grew +13.4% in dollars over the same period last year.

Four of the nine divisions posted growth in volume in Q3, a positive change from the first two quarters of the year, heading into the 2023 new crop.



2023 Crop is Available

Fresh Idaho potatoes from the 2023 crop have completed harvest and are available in stores now. Idaho acreage of +12% this year, resulted in a plentiful crop with sizing and quality to match. Retailers should revisit programming holiday promotions that were not readily available last year.

The US economy is heading into an interesting scenario where US consumer credit card debt is

achieving all time highs, nearly 1 in 5 American's resumed paying back their student loans, and the US Federal Reserve is struggling to rein in inflation. All of this leads us to believe consumers will be focused on stretching their dollars at the register. This holiday season potatoes will be the perfect item for retailers to target to increase category sales and drive foot traffic.

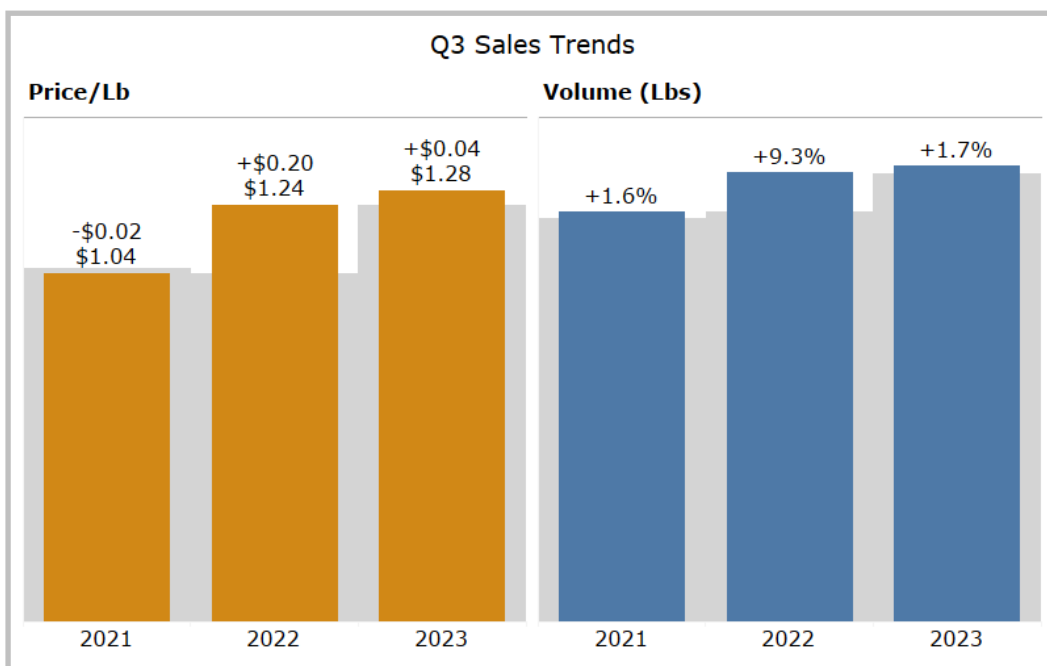


Q3 2023: Yellow Sales Growth

Yellows outpace Reds and Still Climbing

Yellow Potatoes have been on the rise over the past 2 years. Reports indicate that Idaho farmers are switching from planting Reds to Yellows, resulting in greater volume and opportunity to sell yellows. While the variety has continued to rise in price, driven by inflation and supply, volume continues to outperform the prior year.

Idaho is the leading grower of Yellow potatoes in the country. Known for their moist texture and buttery flavor, Yellows continue to grow in popularity among consumers. With a greater crop just harvested for yellow potatoes, more opportunities to showcase and sell the variety are available this year.



	Dollars	Dollars % Chg YoY	Volume (Lbs)	Volume (Lbs) % Chg YoY	Avg Price/Lb	Avg Price/Lb Chg YoY
Grand Total	\$956.4M	+6.5%	876.9M	-0.4%	\$1.09	+\$0.07
Russet	\$499.1M	+10.6%	559.4M	-0.8%	\$0.89	+\$0.09
Yellow	\$147.7M	+5.0%	115.2M	+1.7%	\$1.28	+\$0.04
Red	\$133.6M	-4.3%	111.6M	-0.1%	\$1.20	-\$0.05
Gourmet	\$101.8M	+5.8%	40.9M	+8.3%	\$2.49	-\$0.06
White	\$44.2M	+1.1%	37.6M	-9.5%	\$1.18	+\$0.12
Convenience	\$29.8M	+13.8%	12.1M	+5.3%	\$2.46	+\$0.18



2023 Q3: East North Central Division



Gourmet and Convenience Regain Share

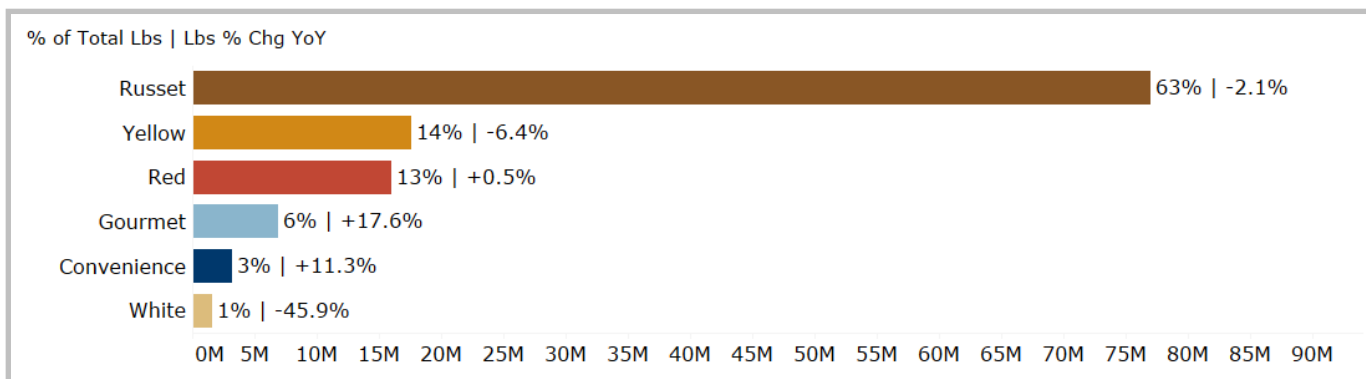
In Q3 2023, total Russet dollars in the E.N. Central division were up +11.0%, while volume was down -2.1%. Red, Convenience, and Gourmet potatoes all grew in volume sales over the prior year.

5lb bags were the top selling pack size in the E.N. Central division overall, carrying 44% of total potato volume. Of the 5lb pack sizes, Russet 5lb is the top selling item in the division, posting a dollar increase of +12.0% compared to last year.

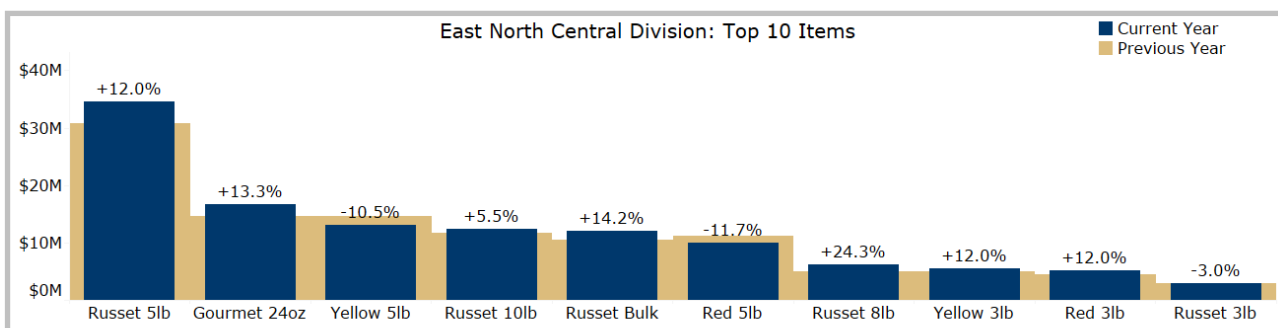
Q3 Performance: All Varieties

	Dollars	Dollars % Chg YoY	Volume (Lbs)	Volume (Lbs) % Chg YoY	Avg Price/Lb	Avg Price/Lb Chg YoY
Grand Total	\$133.2M	+4.9%	122.5M	-2.2%	\$1.09	+\$0.07
Russet	\$68.6M	+11.0%	77.1M	-2.1%	\$0.89	+\$0.11
Yellow	\$21.8M	-3.0%	17.6M	-6.4%	\$1.23	+\$0.04
Red	\$17.9M	-7.7%	16.0M	+0.5%	\$1.12	-\$0.10
Gourmet	\$16.6M	+13.3%	6.9M	+17.6%	\$2.40	-\$0.09
Convenience	\$6.2M	+15.7%	3.2M	+11.3%	\$1.93	+\$0.07
White	\$2.1M	-35.3%	1.6M	-45.9%	\$1.32	+\$0.22

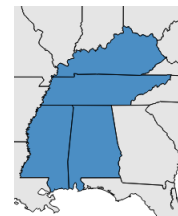
All Varieties by Volume



Top 10 Items: All Varieties



2023 Q3: East South Central Division



Russets and Yellows Lead in Growth

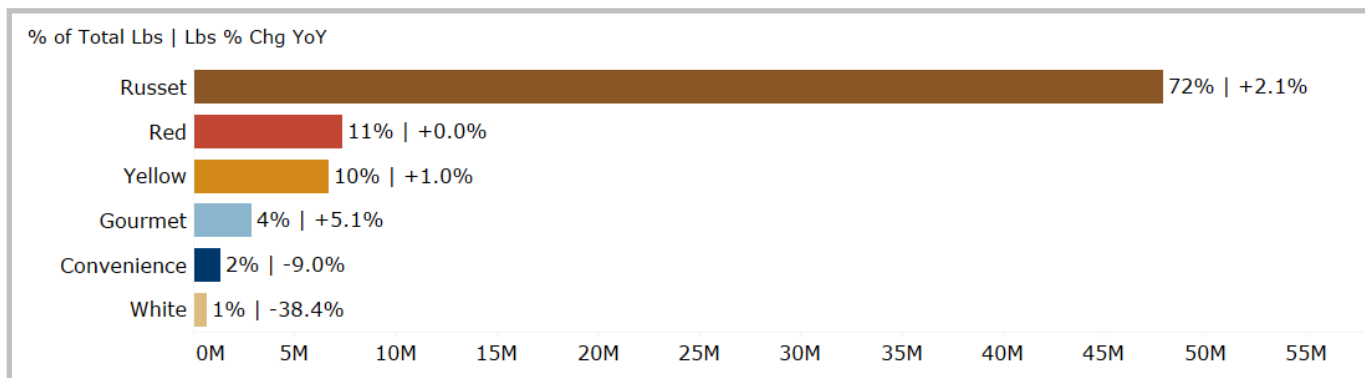
In Q3 2023, total Russet dollars and volume in the E.S. Central division were up +9.7%, and +2.1%, respectively. Russets led the category in this division in dollar growth, while Gourmets lead in volume.

5lb bags in the total category were the top selling pack size in the E.S. Central division overall, carrying 42% of total potato volume. Russet 5lb bags were the top selling item in the division, posting a dollar increase of +7.4% and a volume increase of +0.9% compared to year ago.

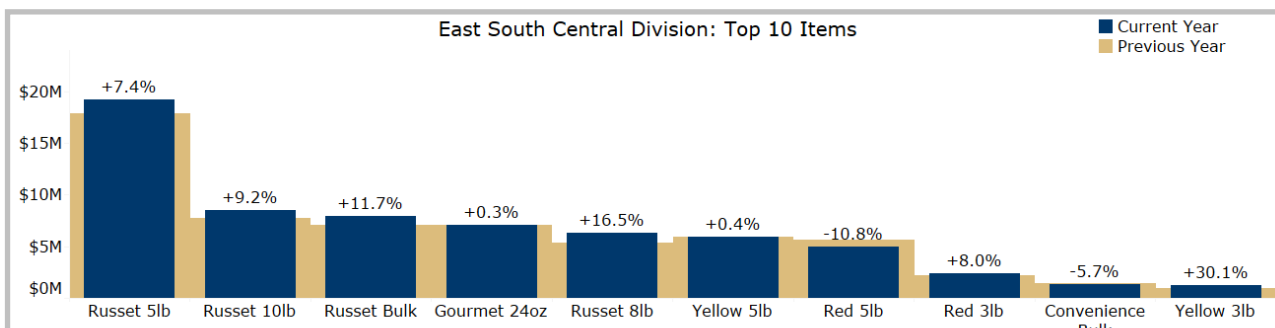
Q3 Performance: All Varieties

	Dollars	Dollars % Chg YoY	Volume (Lbs)	Volume (Lbs) % Chg YoY	Avg Price/Lb	Avg Price/Lb Chg YoY
Grand Total	\$72.8M	+5.1%	66.9M	+1.0%	\$1.09	+\$0.04
Russet	\$44.6M	+9.7%	47.9M	+2.1%	\$0.93	+\$0.06
Red	\$8.6M	-7.0%	7.4M	+0.0%	\$1.17	-\$0.09
Yellow	\$8.4M	+4.9%	6.7M	+1.0%	\$1.25	+\$0.05
Gourmet	\$7.1M	+0.3%	2.9M	+5.1%	\$2.46	-\$0.12
Convenience	\$3.1M	-3.2%	1.3M	-9.0%	\$2.30	+\$0.14
White	\$1.0M	-5.7%	0.6M	-38.4%	\$1.50	+\$0.52

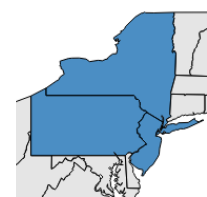
All Varieties by Volume



Top 10 Items: All Varieties



2023 Q3: Middle Atlantic Division



Every Variety Up in Dollar and Volume Sales

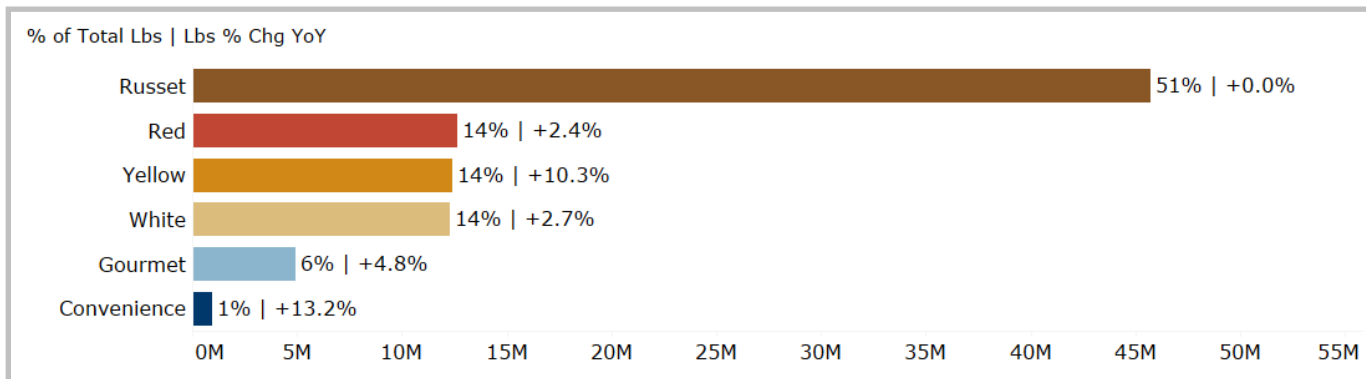
In Q3 2023, total Russet dollars in the Mid Atlantic division were up +9.4%, while volume remained at the same level of the same period last year. Every variety was up in dollars and volume this quarter, with only Gourmets posting a drop in price. .

5lb bags in the total category were the top selling pack size in the Mid Atlantic division overall. They carry 47% of total potato volume. Of the 5lb pack sizes, Russet 5lb bags were the top selling item in the Mid Atlantic division, posting a dollar increase of over +14.1% compared to Q3 2022.

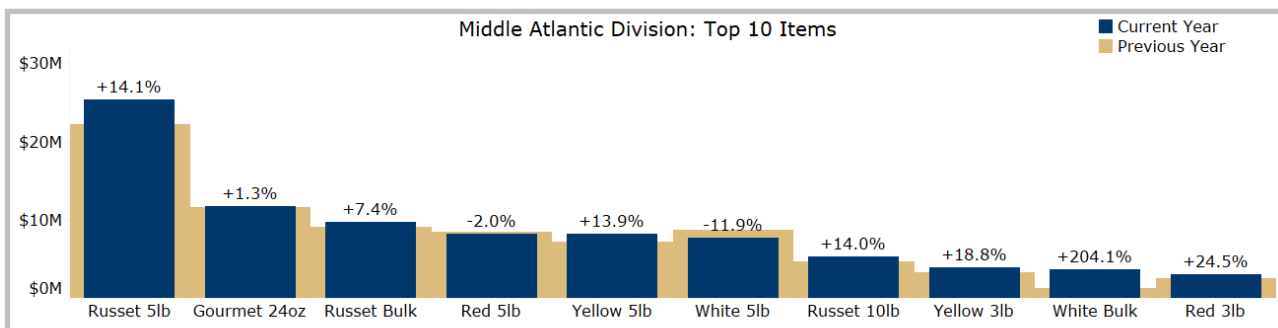
Q3 Performance: All Varieties

	Dollars	Dollars % Chg YoY	Volume (Lbs)	Volume (Lbs) % Chg YoY	Avg Price/Lb	Avg Price/Lb Chg YoY
Grand Total	\$104.6M	+9.5%	89.0M	+2.4%	\$1.17	+\$0.08
Russet	\$44.8M	+9.4%	45.7M	+0.0%	\$0.98	+\$0.08
Yellow	\$16.6M	+15.7%	12.4M	+10.3%	\$1.33	+\$0.06
Red	\$16.1M	+3.5%	12.7M	+2.4%	\$1.27	+\$0.01
White	\$12.3M	+15.4%	12.3M	+2.7%	\$1.00	+\$0.11
Gourmet	\$11.8M	+1.3%	4.9M	+4.8%	\$2.39	-\$0.08
Convenience	\$3.0M	+25.6%	1.0M	+13.2%	\$3.15	+\$0.31

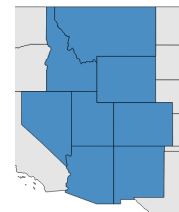
All Varieties by Volume



Top 10 Items: All Varieties



2023 Q3: Mountain Division



Mountain Division Leads in Dollar Growth, Again

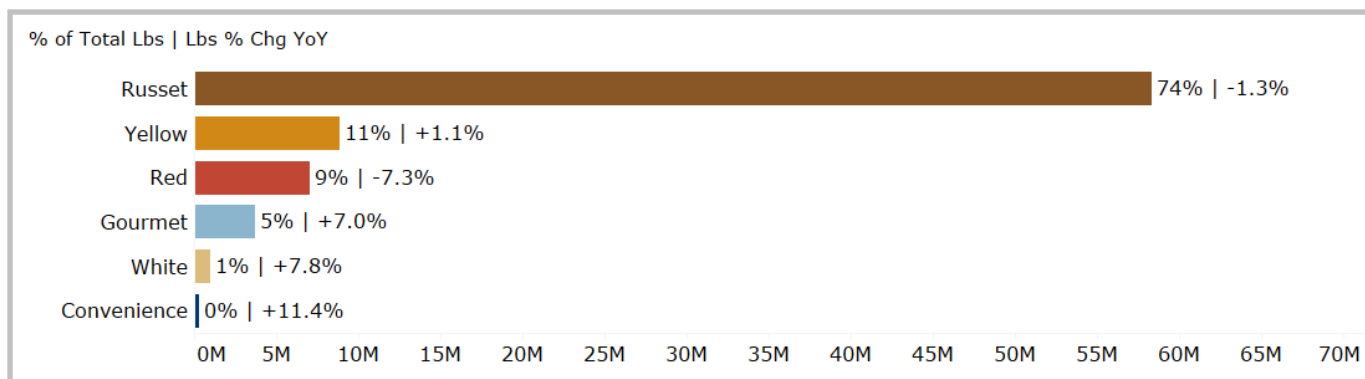
In Q3 2023, total Russet dollars in the Mountain division were up +19.1%, while volume was down -1.3%. Among all varieties in the division, all except Red grew in either dollars or volume over the same period last year.

5lb bags in the category total are the top selling pack size in the Mountain division overall, carrying 41% of total potato volume. 5lb Russets were the top performing item in this division, up +33.1% in dollars and +4.2% in volume in Q3.

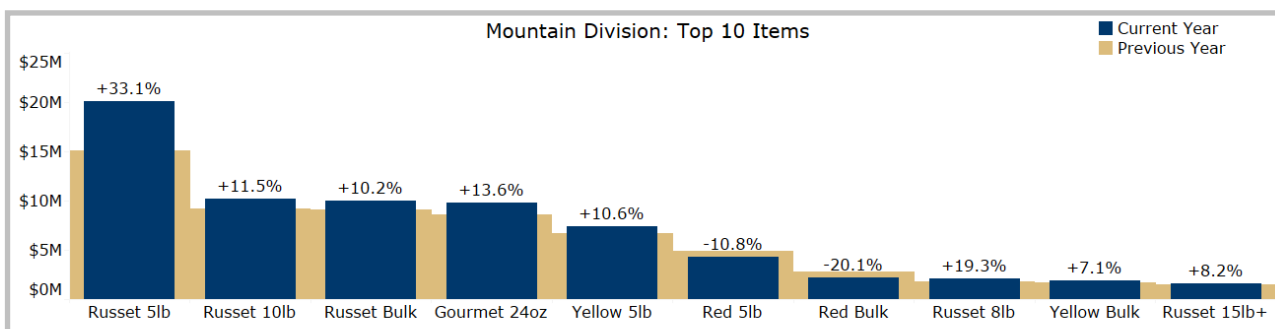
Q3 Performance: All Varieties

	Dollars	Dollars % Chg YoY	Volume (Lbs)	Volume (Lbs) % Chg YoY	Avg Price/Lb	Avg Price/Lb Chg YoY
Grand Total	\$77.3M	+12.9%	79.3M	-1.1%	\$0.97	+\$0.12
Russet	\$44.9M	+19.1%	58.3M	-1.3%	\$0.77	+\$0.13
Yellow	\$11.8M	+9.2%	8.9M	+1.1%	\$1.33	+\$0.10
Gourmet	\$9.7M	+13.6%	3.7M	+7.0%	\$2.64	+\$0.15
Red	\$8.7M	-7.9%	7.1M	-7.3%	\$1.24	-\$0.01
White	\$1.4M	+9.7%	1.0M	+7.8%	\$1.37	+\$0.02
Convenience	\$0.8M	+18.6%	0.3M	+11.4%	\$2.36	+\$0.14

All Varieties by Volume



Top 10 Items: All Varieties



2023 Q3: New England Division



Yellow Growth Surpasses Russets

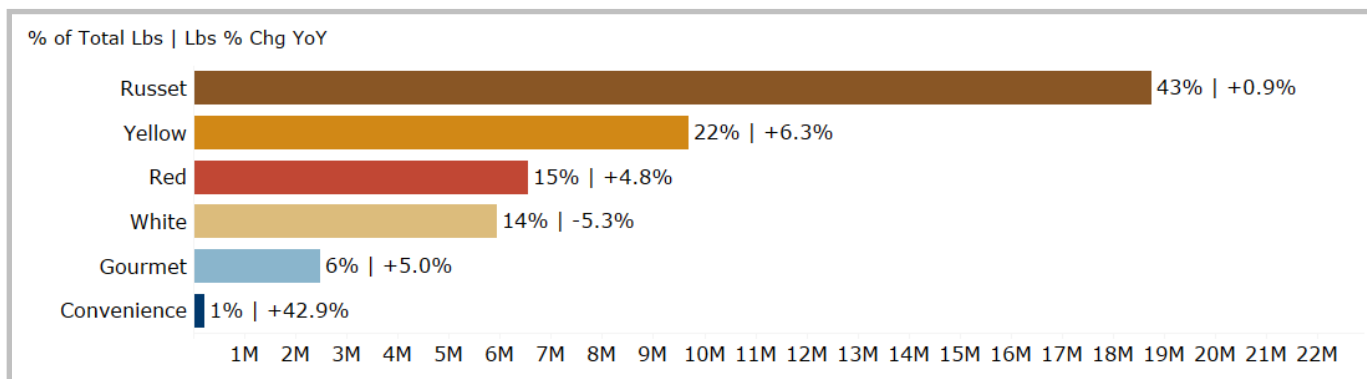
In Q3 2023, total Russet dollars in the New England division were up +7.3% and total Russet volume was up +0.9%. Yellow potatoes continue to succeed in this division, with .

5lb bags and bulk were the top selling pack sizes in the New England division overall, carrying 42% and 25% of total potato volume, respectively. In Russets, the 5lb bag was the best selling pack size posting a +12.2% increase in dollars and a +7.3% increase in volume over last year.

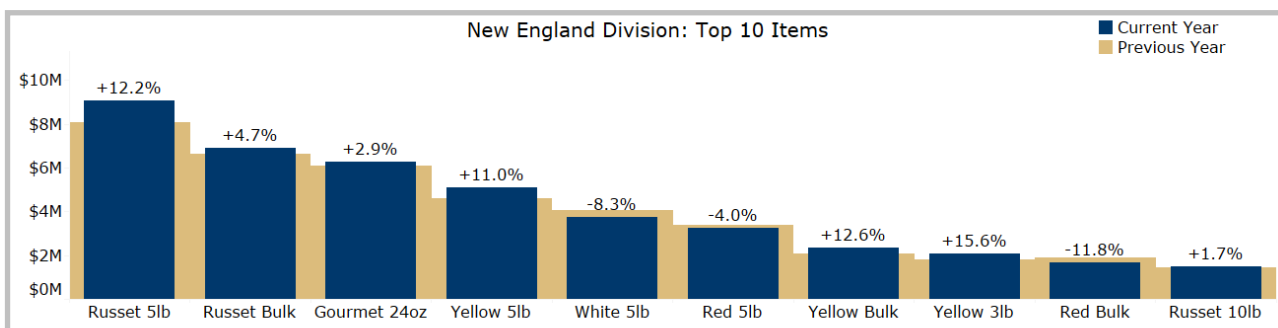
Q3 Performance: All Varieties

	Dollars	Dollars % Chg YoY	Volume (Lbs)	Volume (Lbs) % Chg YoY	Avg Price/Lb	Avg Price/Lb Chg YoY
Grand Total	\$50.1M	+6.5%	43.7M	+2.1%	\$1.15	+\$0.05
Russet	\$18.9M	+7.3%	18.8M	+0.9%	\$1.01	+\$0.06
Yellow	\$11.6M	+11.3%	9.7M	+6.3%	\$1.19	+\$0.05
Red	\$7.5M	-0.6%	6.5M	+4.8%	\$1.15	-\$0.06
Gourmet	\$6.3M	+2.9%	2.5M	+5.0%	\$2.52	-\$0.05
White	\$5.1M	+5.2%	5.9M	-5.3%	\$0.86	+\$0.09
Convenience	\$0.7M	+44.7%	0.2M	+42.9%	\$3.14	+\$0.04

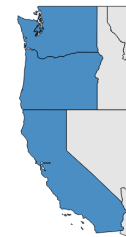
All Varieties by Volume



Top 10 Items: All Varieties



2023 Q3: Pacific Division



Bulk and 5lb Russets Drive the Category

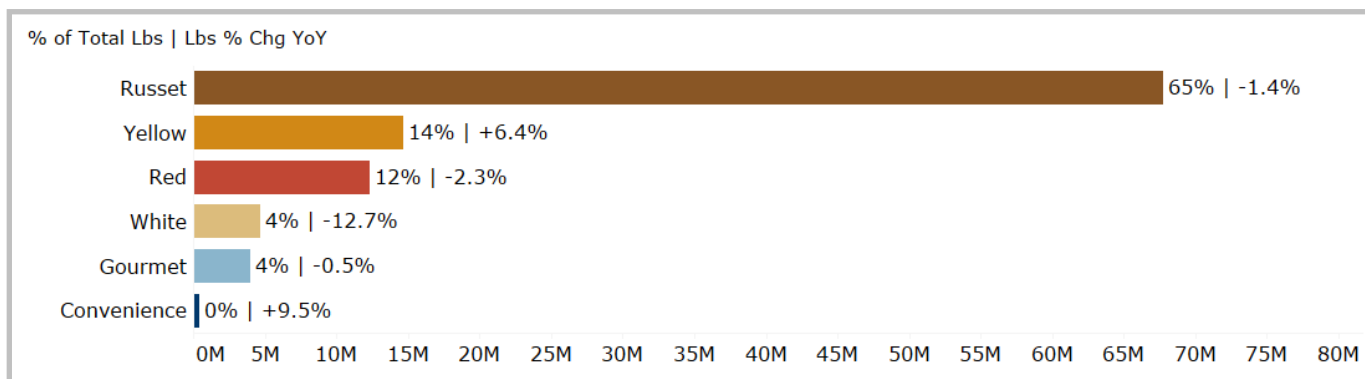
In Q3 2023, total Russet dollars in the Pacific division were up +13.1%, while volume was down -1.4%. Yellow and Convenience varieties both surpassed last year's sales in dollars and volume.

Bulk potatoes were the preferred way consumers shopped the category in the Pacific division dollars, carrying 40% of total potato volume. Among Russets, bulks were the top selling item in the division, posting a dollar increase of +14.2% compared to a year ago. The Pacific is the only division in Q3 with bulk Russets outperforming 5lb bags.

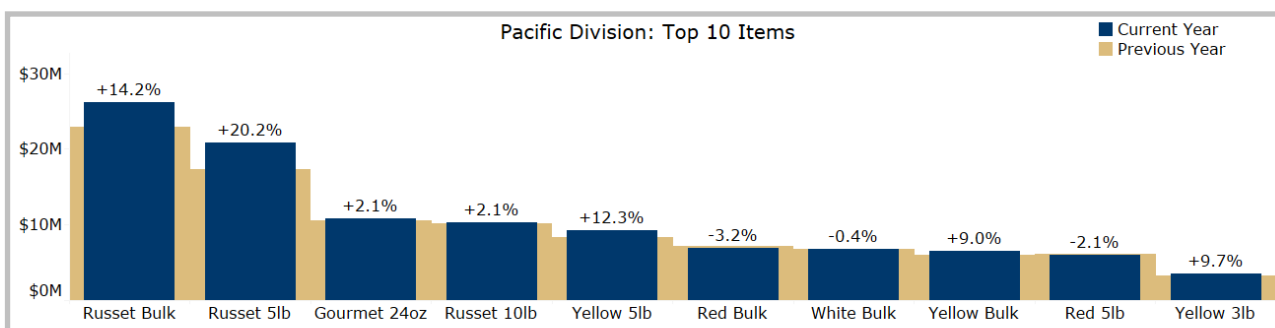
Q3 Performance: All Varieties

	Dollars	Dollars % Chg YoY	Volume (Lbs)	Volume (Lbs) % Chg YoY	Avg Price/Lb	Avg Price/Lb Chg YoY
Grand Total	\$116.4M	+8.8%	103.8M	-1.0%	\$1.12	+\$0.10
Russet	\$60.7M	+13.1%	67.7M	-1.4%	\$0.90	+\$0.11
Yellow	\$21.1M	+12.4%	14.7M	+6.4%	\$1.44	+\$0.08
Red	\$16.0M	-0.3%	12.3M	-2.3%	\$1.30	+\$0.03
Gourmet	\$10.8M	+2.1%	4.0M	-0.5%	\$2.71	+\$0.07
White	\$6.9M	-3.1%	4.7M	-12.7%	\$1.49	+\$0.15
Convenience	\$0.9M	+20.7%	0.4M	+9.5%	\$2.25	+\$0.21

All Varieties by Volume



Top 10 Items: All Varieties



2023 Q3: South Atlantic Division



Yellows Continue to Take Share from Reds

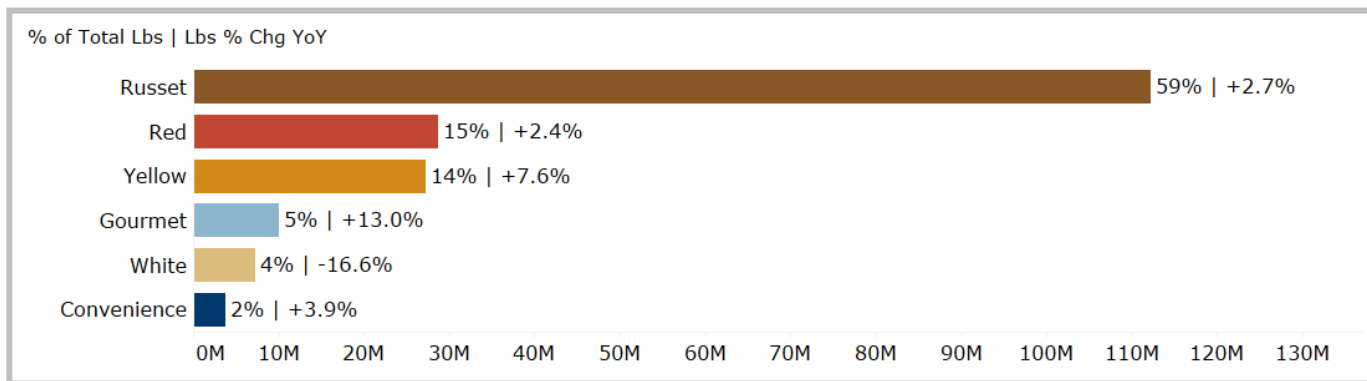
In Q3 2023, total Russet dollars and volume in the South Atlantic division were up +10.7% and +2.7% respectively.

5lb bags were the top selling pack size in the South Atlantic division overall, carrying 42% of total potato volume. Russet 5lb and Russet Bulk are the top selling items in the division, with both growing in double digit percentage increases over the same period last year.

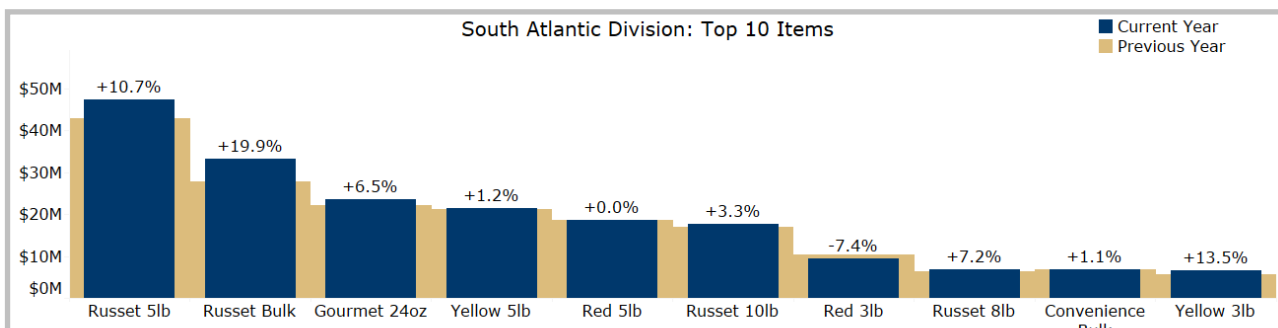
Q3 Performance: All Varieties

	Dollars	Dollars % Chg YoY	Volume (Lbs)	Volume (Lbs) % Chg YoY	Avg Price/Lb	Avg Price/Lb Chg YoY
Grand Total	\$225.3M	+6.6%	189.5M	+2.9%	\$1.19	+\$0.04
Russet	\$112.1M	+10.7%	112.3M	+2.7%	\$1.00	+\$0.07
Red	\$35.6M	-3.0%	28.8M	+2.4%	\$1.24	-\$0.07
Yellow	\$33.7M	+5.2%	27.3M	+7.6%	\$1.23	-\$0.03
Gourmet	\$23.5M	+6.5%	10.1M	+13.0%	\$2.33	-\$0.14
Convenience	\$11.4M	+13.3%	3.8M	+3.9%	\$2.95	+\$0.25
White	\$8.9M	-1.6%	7.3M	-16.6%	\$1.23	+\$0.19

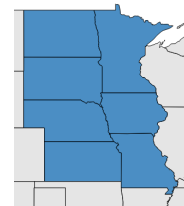
All Varieties by Volume



Top 10 Items: All Varieties



2023 Q3: West North Central Division



Specialty Varieties Lead in Growth

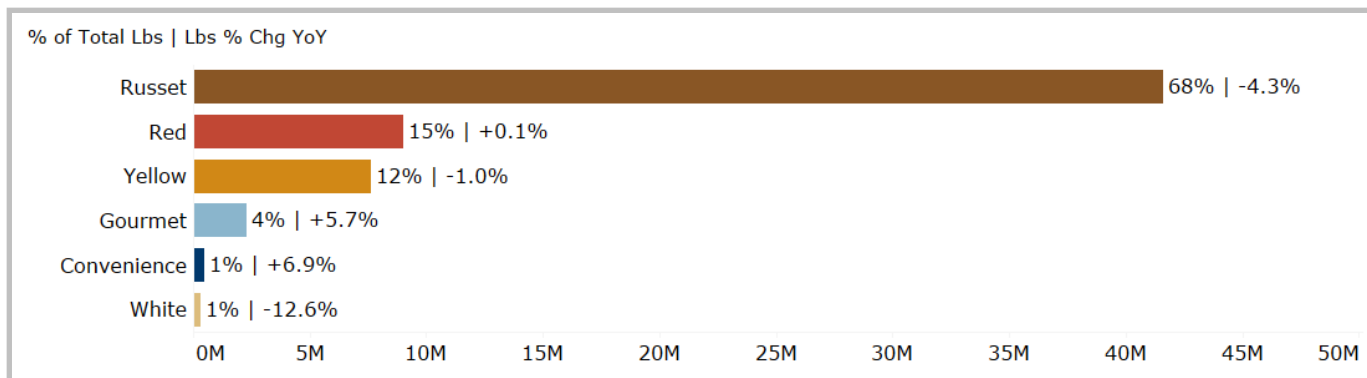
In Q3 2023, total Russet dollars in the W.N. Central division were up +5.0%, while volume was down -4.3%. Convenience and Gourmet varieties both experienced dollar and volume increases this quarter.

Total 5lb bags were the top selling pack size in the W.N. Central division overall, carrying 50% of total potato volume. Of the 5lb pack sizes, Russet 5lb bags were the top selling item in the division, posting a dollar increase of +6.1% compared to 2022 Q3.

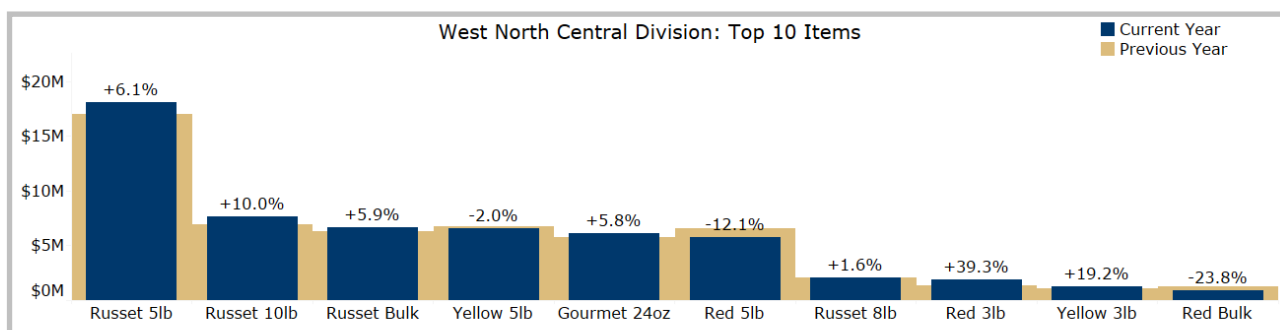
Q3 Performance: All Varieties

	Dollars	Dollars % Chg YoY	Volume (Lbs)	Volume (Lbs) % Chg YoY	Avg Price/Lb	Avg Price/Lb Chg YoY
Grand Total	\$61.4M	+1.7%	61.4M	-2.9%	\$1.00	+\$0.05
Russet	\$34.9M	+5.0%	41.6M	-4.3%	\$0.84	+\$0.07
Yellow	\$9.5M	-2.6%	7.7M	-1.0%	\$1.24	-\$0.02
Red	\$9.4M	-7.4%	9.0M	+0.1%	\$1.04	-\$0.08
Gourmet	\$6.1M	+5.8%	2.3M	+5.7%	\$2.68	+\$0.00
Convenience	\$1.1M	+13.7%	0.5M	+6.9%	\$2.30	+\$0.14
White	\$0.4M	-15.4%	0.3M	-12.6%	\$1.26	-\$0.04

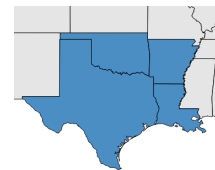
All Varieties by Volume



Top 10 Items: All Varieties



2023 Q3: West South Central Division



The W.S.C. Division Loves Russets

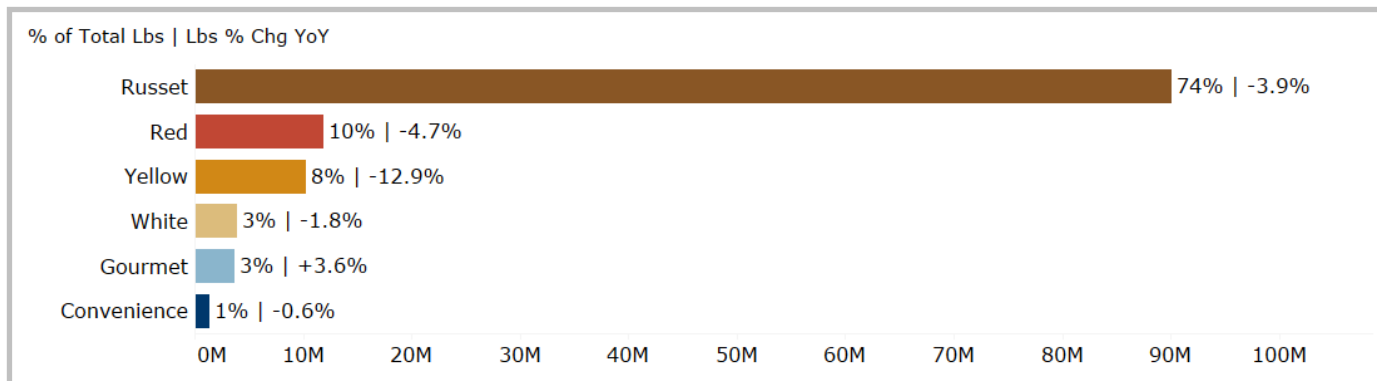
In Q3 2023, total Russet dollars in the W.S. Central division were up +8.1%, while volume was down -3.9%. Each variety posted year-over-year volume declines except for Gourmet which saw a +3.6% rise in total volume.

5lb bags in the total category were the top selling pack size in the W.S. Central division overall, carrying 43% of total potato volume. Of the 5lb pack sizes, Russet 5lb bags were the top selling item in the division, posting a dollar increase of +12.2% compared to last year.

Q3 Performance: All Varieties

	Dollars	Dollars % Chg YoY	Volume (Lbs)	Volume (Lbs) % Chg YoY	Avg Price/Lb	Avg Price/Lb Chg YoY
Grand Total	\$115.4M	+2.9%	121.3M	-4.5%	\$0.95	+\$0.07
Russet	\$69.7M	+8.1%	90.1M	-3.9%	\$0.77	+\$0.09
Red	\$13.7M	-11.0%	11.9M	-4.7%	\$1.15	-\$0.08
Yellow	\$13.2M	-5.9%	10.3M	-12.9%	\$1.29	+\$0.10
Gourmet	\$9.9M	+1.3%	3.7M	+3.6%	\$2.70	-\$0.06
White	\$6.2M	+1.6%	3.9M	-1.8%	\$1.56	+\$0.05
Convenience	\$2.7M	+12.5%	1.3M	-0.6%	\$1.99	+\$0.23

All Varieties by Volume



Top 10 Items: All Varieties

