



2022 Q4

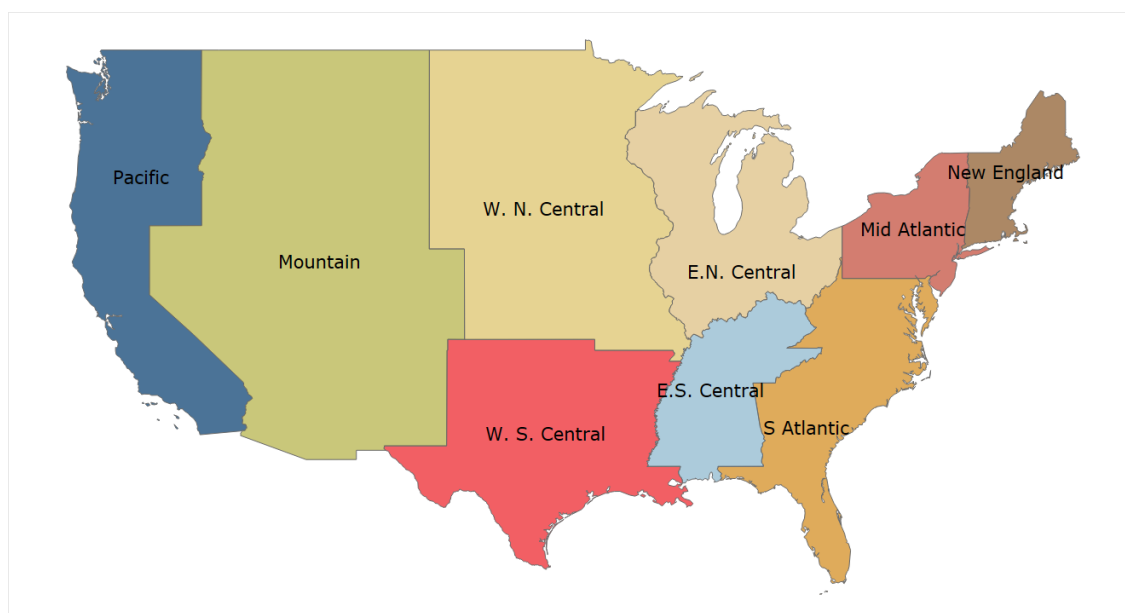
Potato Category Review

Idaho Potato Commission

2022 Q4 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 Oct 2 - Dec 31, 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 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 packsize; 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, October—December, 2022



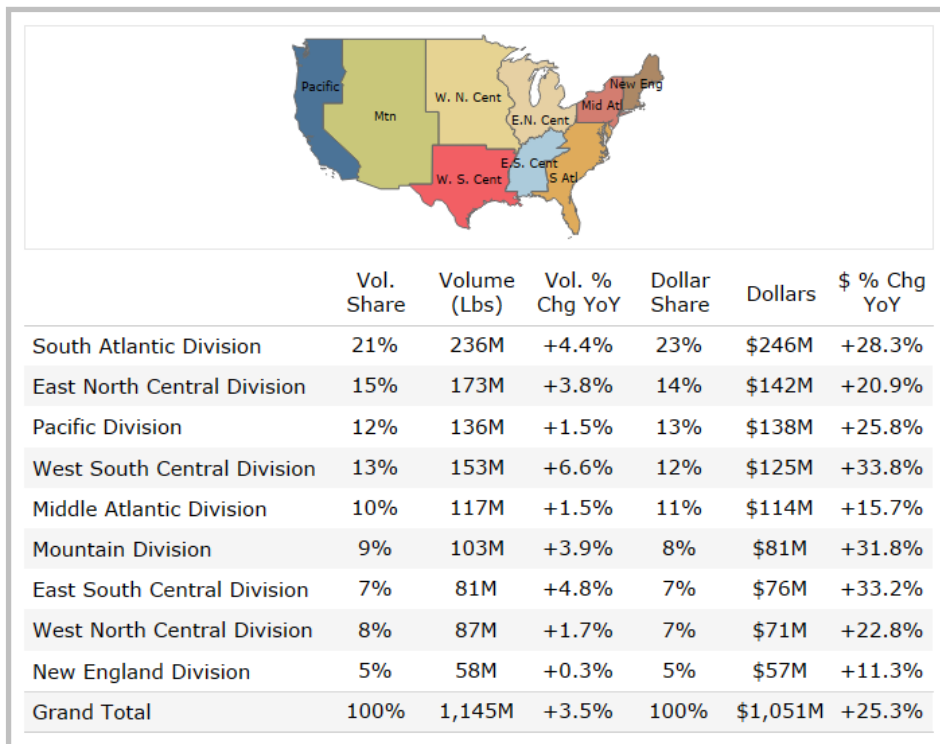
2022 Q4: Total US

Dollars & Volume End on a High in Q4

All nine divisions gained in dollars and volume at retail in Q4. As a category total, potatoes posted dollar growth this quarter of over 25% and volume growth of 3.5%. The West South Central Division experienced the greatest year-over-year volume growth at over +6.6%. Despite worries of potato volume throughout 2022, the category has remained strong at retail.

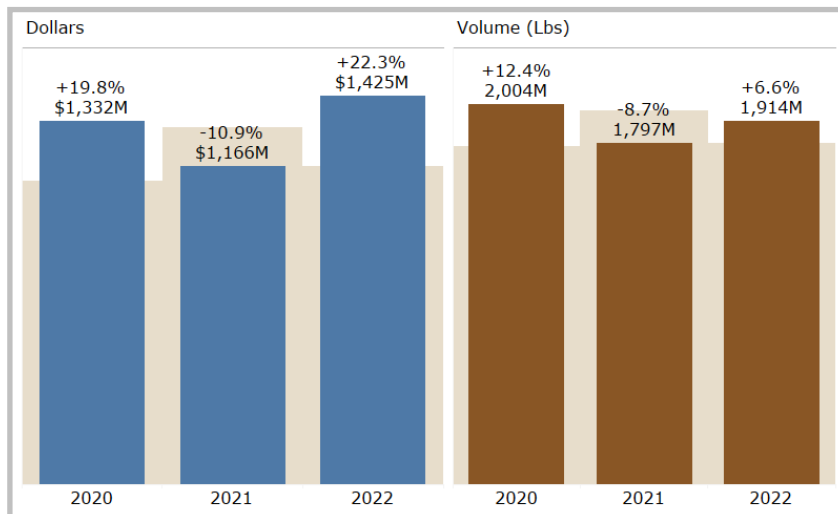
Potatoes continue to stand out as a value item during periods of inflation. “Potatoes are inflation busters. Even with the fairly significant gain in potato prices, we’re still not seeing

volume declining, and that’s been a good thing for retailers,” said Category Partners CEO Tom Barnes. With help from your IPC retail promotion directors, utilizing data and promotion strategies can help produce managers evaluate how to better use potatoes to lift their entire department.



5lb Reds, Yellows, and Russets Shine in 2022

2021 brought with it a drop in 5lb red, yellow, and russet bags, coming off of pandemic shopping trends in retail dollar and volume sales. However, 2022 bounced right back, surpassing 2020 dollar growth and coming close in volume. In the past 52 weeks, 5lb russets in the Total US were up +10.2% in volume and +26.6% in dollars at retail.



Gourmet 24oz Potatoes: Annual Pricing Analysis

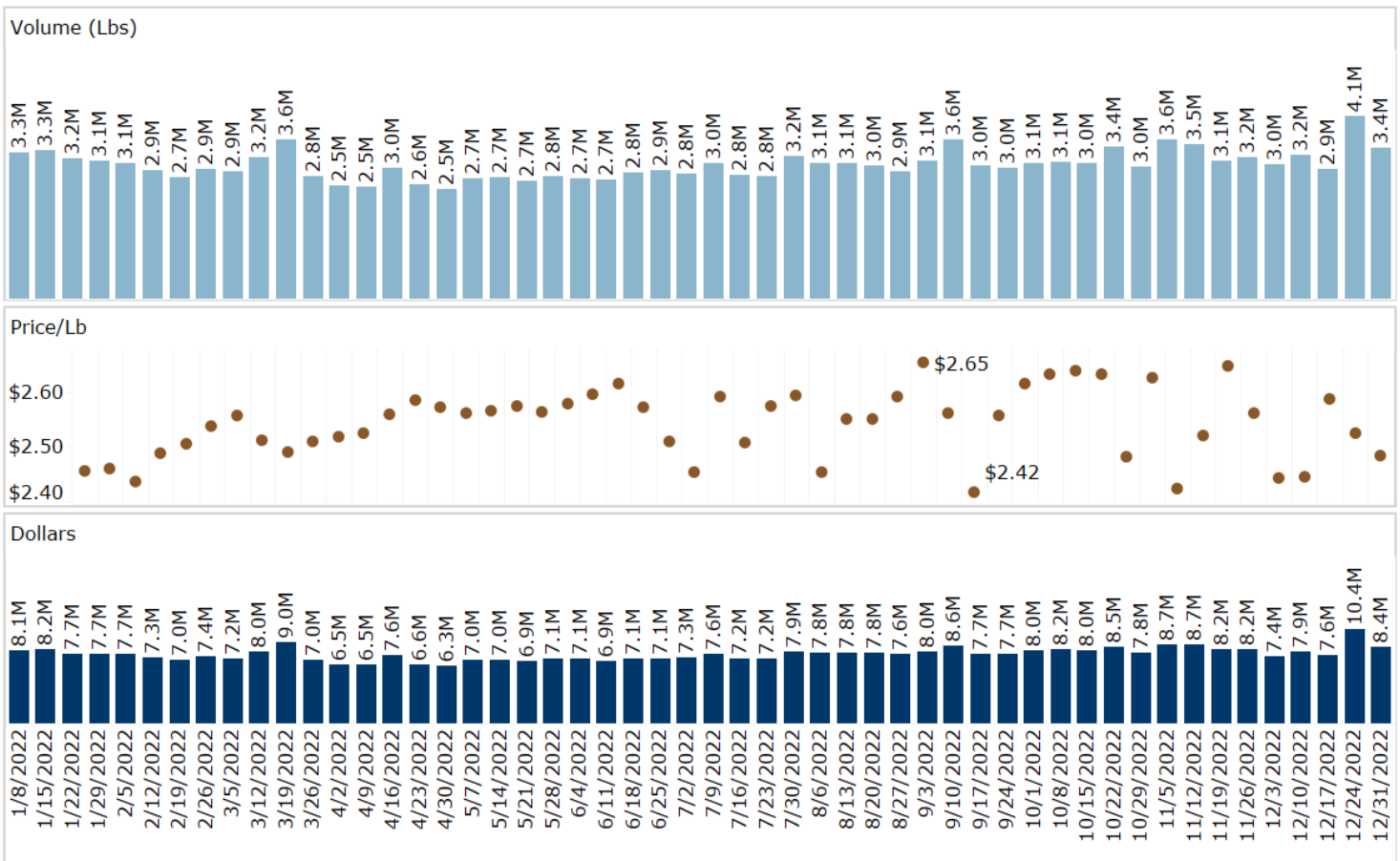
Gourmets Remain Steady through Inflation

While inflation has caused most potato varieties to rise in price, Gourmets (24oz bags) have remained nearly the same throughout the past 52 weeks. The pack size soared through 2020 shopping trends, but has slowed as shoppers turn to greater value items as their shopping basket totals increase.

Gourmets hit their 52 week highest price at the end of August and again right before Thanksgiving, at \$2.65, while they ended the year on a downward

slope, at \$2.48.

Ross Johnson, VP of Retail and International at IPC says, "Research shows Gourmet varieties are not cannibalistic to the potato category. Retailers could maximize sales through merchandising both bagged and 24oz near each other. Creative opportunities exist for promotional ads which incorporate both 5lb and 24oz pack sizes to elevate lift on all items in the category."



2022 Q4: East North Central Division

Yellow Volume Sales Continue Growth Over Reds

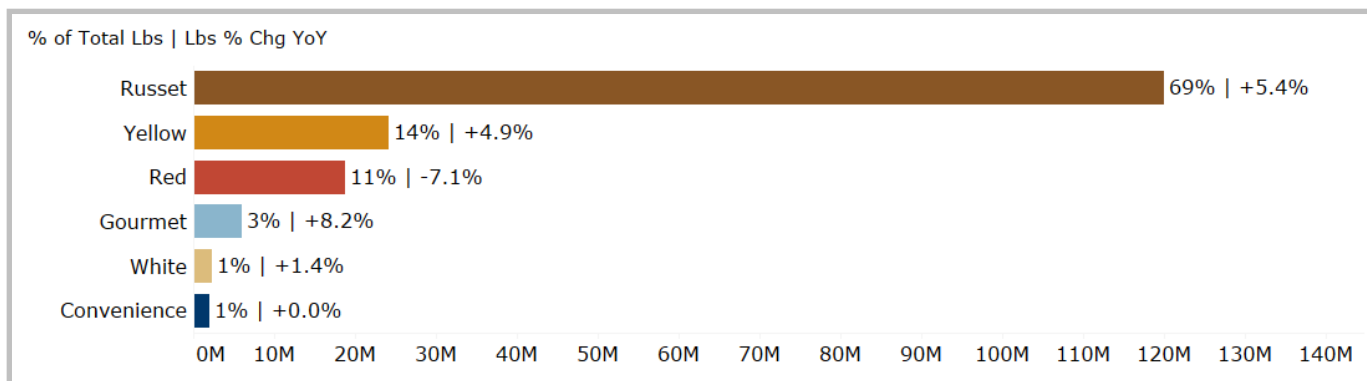
In Q4 2022, total russet dollars in the E.N. Central division were up +25.6%, while volume was up 5.4%. All varieties are up in dollars, while only reds fell in volume.

5lb bags in the total category are the top selling pack size in the E.N. Central division overall, carrying 47% of total potato volume. Of the 5lb pack sizes, russet 5lb is the top selling item in the division, posting a dollar increase of +33.5% compared to year ago.

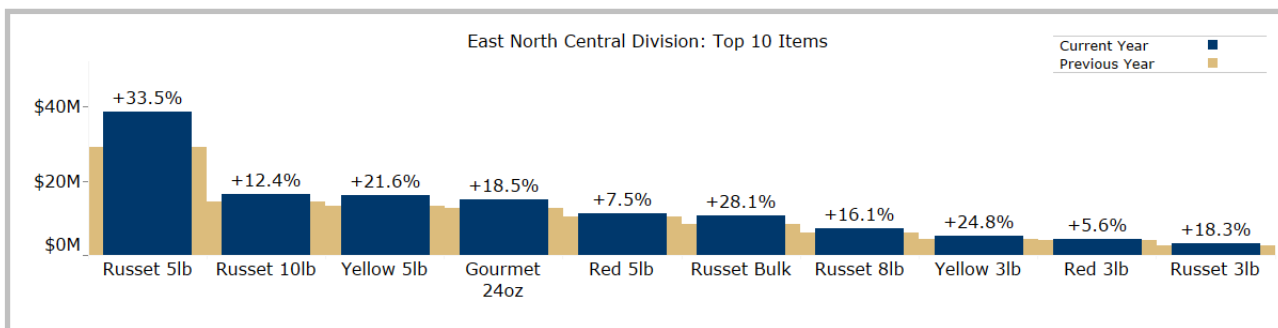
Q4 Performance: All Varieties

	Dollars	\$ Chg vs LY	\$ % Chg YoY	Volume (Lbs)	Vol. Chg vs LY	Vol. % Chg YoY	Avg Price/Lb	Price Per Lb Chg
Grand Total	\$142.1M	+\$24.6M	+20.9%	173.3M	+6.4M	+3.8%	\$0.82	+\$0.12
Russet	\$77.6M	+\$15.8M	+25.6%	120.0M	+6.2M	+5.4%	\$0.65	+\$0.10
Yellow	\$24.1M	+\$4.2M	+21.1%	24.2M	+1.1M	+4.9%	\$0.99	+\$0.13
Red	\$18.7M	+\$1.2M	+6.8%	18.7M	-1.4M	-7.1%	\$1.00	+\$0.13
Gourmet	\$14.9M	+\$2.3M	+18.5%	6.0M	+0.5M	+8.2%	\$2.50	+\$0.22
Convenience	\$4.2M	+\$0.6M	+15.4%	2.1M	+0.0M	+0.0%	\$2.02	+\$0.27
White	\$2.6M	+\$0.5M	+25.9%	2.3M	+0.0M	+1.4%	\$1.17	+\$0.23

All Varieties by Volume



Top 10 Items: All Varieties



2022 Q4: East South Central Division

5lb Russets Continue Growth with Increased Prices

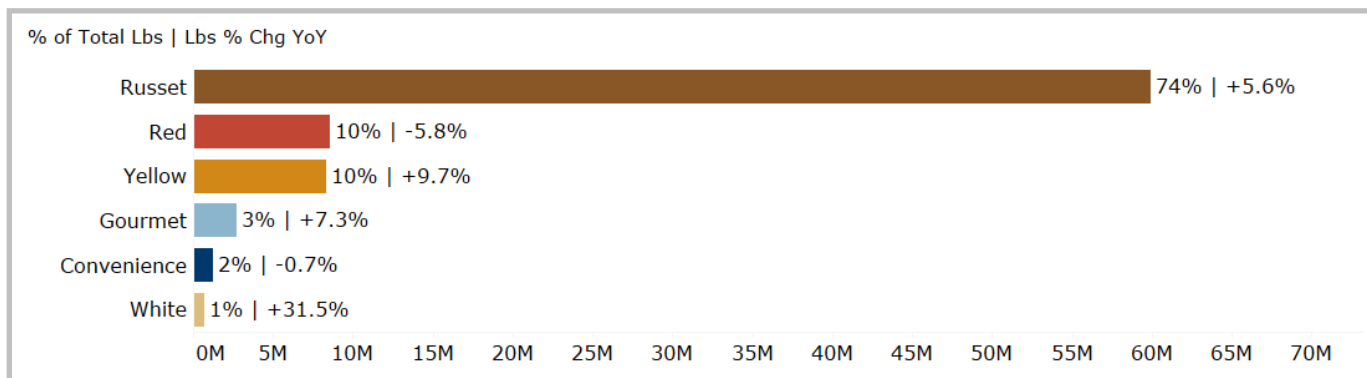
In Q4 2022, total russet dollars in the E.S. Central division were up +39.8%, and volume rose +5.6%. Red and convenience were the only varieties down in volume sales vs 2021 Q4.

5lb bags in the total category are the top selling pack size in the E.S. Central division overall, carrying 43% of total potato volume. Russet 5lb item is the top selling item in the division, posting a dollar increase of +52.3% and a volume increase of +23.9% compared to year ago.

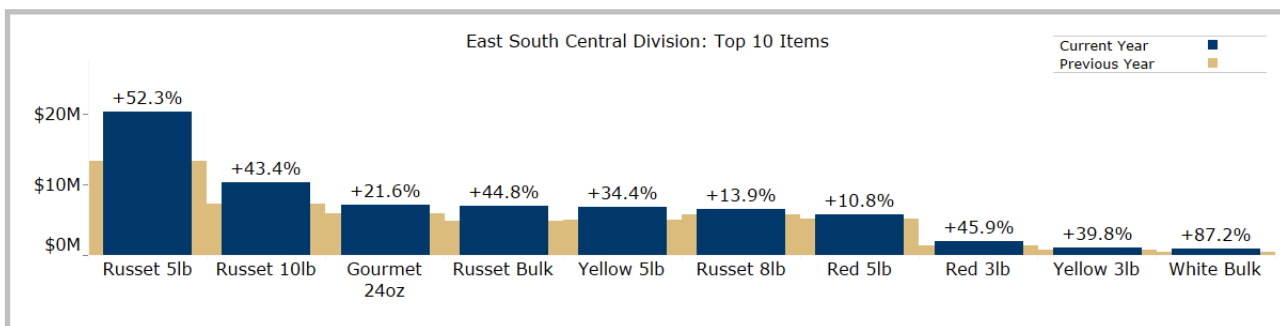
Q4 Performance: All Varieties

	Dollars	\$ Chg vs LY	\$ % Chg YoY	Volume (Lbs)	Vol. Chg vs LY	Vol. % Chg YoY	Avg Price/Lb	Price Per Lb Chg
Grand Total	\$76.0M	+\$18.9M	+33.2%	81.5M	+3.7M	+4.8%	\$0.93	+\$0.20
Russet	\$47.1M	+\$13.4M	+39.8%	60.0M	+3.2M	+5.6%	\$0.79	+\$0.19
Red	\$9.1M	+\$1.2M	+15.2%	8.5M	-0.5M	-5.8%	\$1.07	+\$0.19
Yellow	\$8.9M	+\$2.1M	+31.1%	8.3M	+0.7M	+9.7%	\$1.07	+\$0.17
Gourmet	\$7.1M	+\$1.3M	+21.6%	2.7M	+0.2M	+7.3%	\$2.60	+\$0.30
Convenience	\$2.8M	+\$0.5M	+23.7%	1.2M	+0.0M	-0.7%	\$2.26	+\$0.44
White	\$1.0M	+\$0.4M	+75.8%	0.7M	+0.2M	+31.5%	\$1.43	+\$0.36

All Varieties by Volume



Top 10 Items: All Varieties



2022 Q4: Middle Atlantic Division

Volume Shifts Away from Reds and Yellows

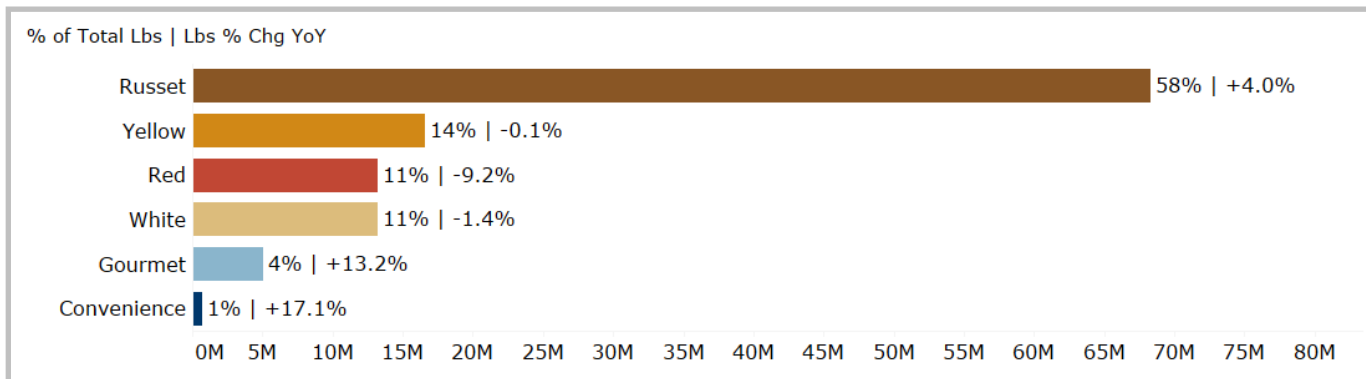
In Q4 2022, total russet dollars in the Mid Atlantic division were up +21.3%, while volume was up +4.0%. Russets, gourmets, and convenience are the only varieties up in volume and dollars this quarter.

5lb bags in the total category are the top selling pack size in the Mid Atlantic division overall. They carry 57% of total potato volume, up from 49% in Q3. Of the 5lb pack sizes, russet 5lb item is the top selling item in the Mid Atlantic division, posting a dollar increase of over +32.7% compared to Q4 2021.

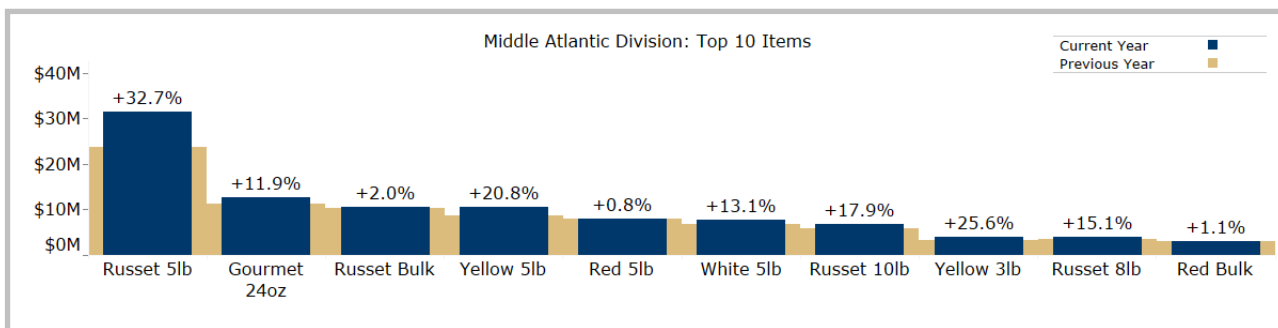
Q4 Performance: All Varieties

	Dollars	\$ Chg vs LY	\$ % Chg YoY	Volume (Lbs)	Vol. Chg vs LY	Vol. % Chg YoY	Avg Price/Lb	Price Per Lb Chg
Grand Total	\$114.1M	+\$15.5M	+15.7%	117.1M	+1.8M	+1.5%	\$0.97	+\$0.12
Russet	\$55.0M	+\$9.7M	+21.3%	68.3M	+2.6M	+4.0%	\$0.81	+\$0.11
Yellow	\$18.6M	+\$2.1M	+12.7%	16.6M	+0.0M	-0.1%	\$1.12	+\$0.13
Red	\$15.7M	+\$0.4M	+2.4%	13.2M	-1.3M	-9.2%	\$1.19	+\$0.14
Gourmet	\$12.6M	+\$1.3M	+11.9%	5.1M	+0.6M	+13.2%	\$2.47	-\$0.03
White	\$9.9M	+\$1.4M	+17.1%	13.2M	-0.2M	-1.4%	\$0.75	+\$0.12
Convenience	\$2.2M	+\$0.5M	+33.7%	0.7M	+0.1M	+17.1%	\$3.14	+\$0.39

All Varieties by Volume



Top 10 Items: All Varieties



2022 Q4: Mountain Division

Russets Continue Market Share Gains in Q4

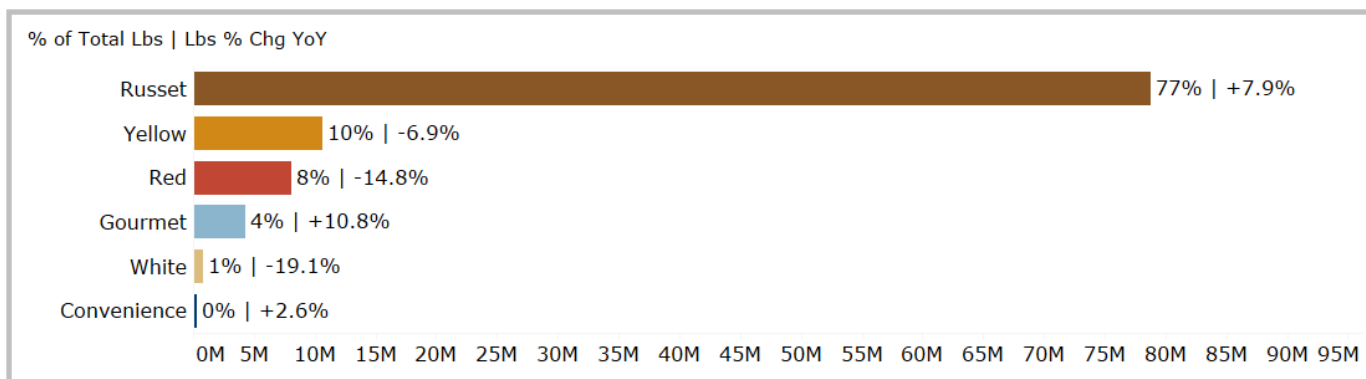
In Q4 2022, total russet dollars in the Mountain division were up +45.8%, while volume was up +7.9%. While the Mountain division makes up just 9% of total volume in the US, it surpasses Total US in both dollar and volume growth in Q4.

5lb bags in the category total are the top selling pack size in the Mountain division overall, carrying 39% of total potato volume.

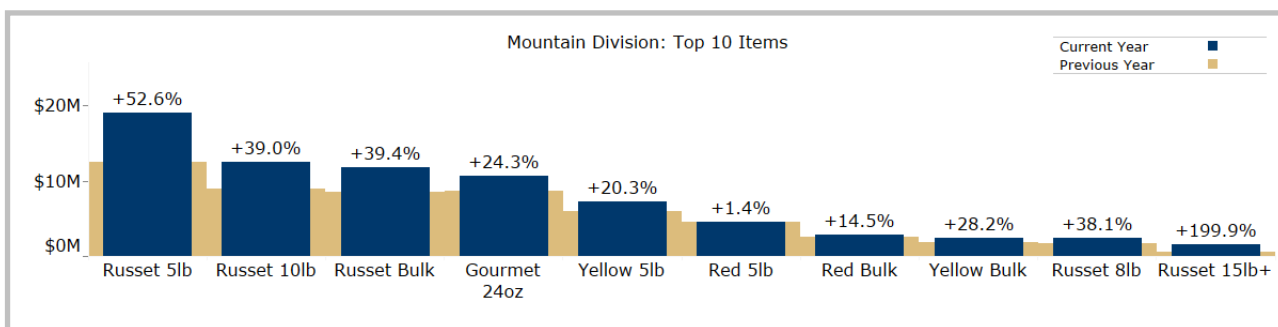
Q4 Performance: All Varieties

	Dollars	\$ Chg vs LY	\$ % Chg YoY	Volume (Lbs)	Vol. Chg vs LY	Vol. % Chg YoY	Avg Price/Lb	Price Per Lb Chg
Grand Total	\$81.2M	+\$19.6M	+31.8%	102.9M	+3.8M	+3.9%	\$0.79	+\$0.17
Russet	\$48.5M	+\$15.2M	+45.8%	78.8M	+5.8M	+7.9%	\$0.61	+\$0.16
Yellow	\$11.5M	+\$1.7M	+17.9%	10.6M	-0.8M	-6.9%	\$1.08	+\$0.23
Gourmet	\$10.7M	+\$2.1M	+24.3%	4.3M	+0.4M	+10.8%	\$2.52	+\$0.27
Red	\$8.8M	+\$0.5M	+5.4%	8.1M	-1.4M	-14.8%	\$1.08	+\$0.21
White	\$1.1M	+\$0.0M	+0.2%	0.8M	-0.2M	-19.1%	\$1.43	+\$0.27
Convenience	\$0.6M	+\$0.1M	+12.9%	0.3M	+0.0M	+2.6%	\$2.20	+\$0.20

All Varieties by Volume



Top 10 Items: All Varieties



2022 Q4: New England Division

Yellows are Top Performing in Q4 Volume Growth

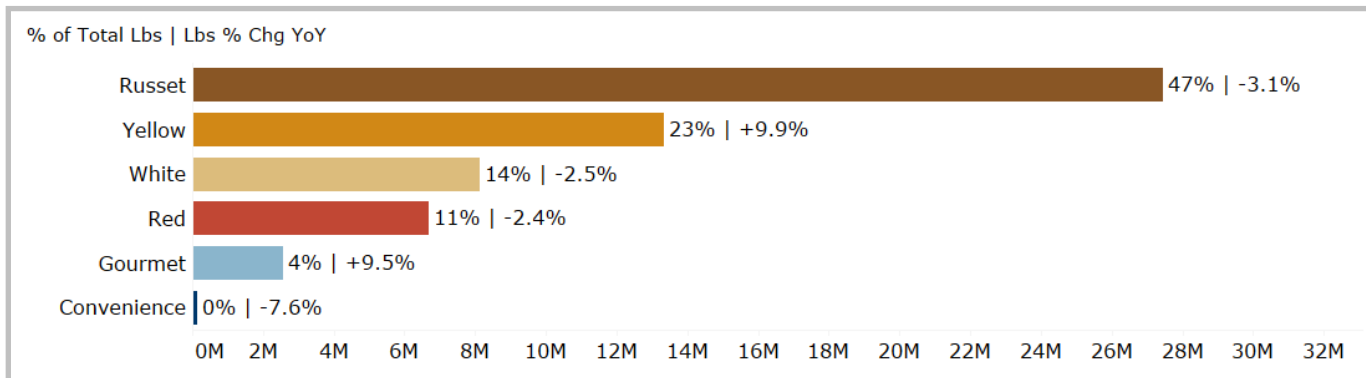
In Q4 2022, total russet dollars in the New England division were up +11.8%, while volume was down -3.1%. Yellows are up +9.9% in volume in this division, while reds are down -2.4% in volume.

Total 5lb bags and bulk are the top selling pack sizes in the New England division overall, carrying 48% and 36% of total potato volume, respectively. In russets, the 5lb bag is the best selling pack size, posting Q4 gains of +14.4% in dollar sales.

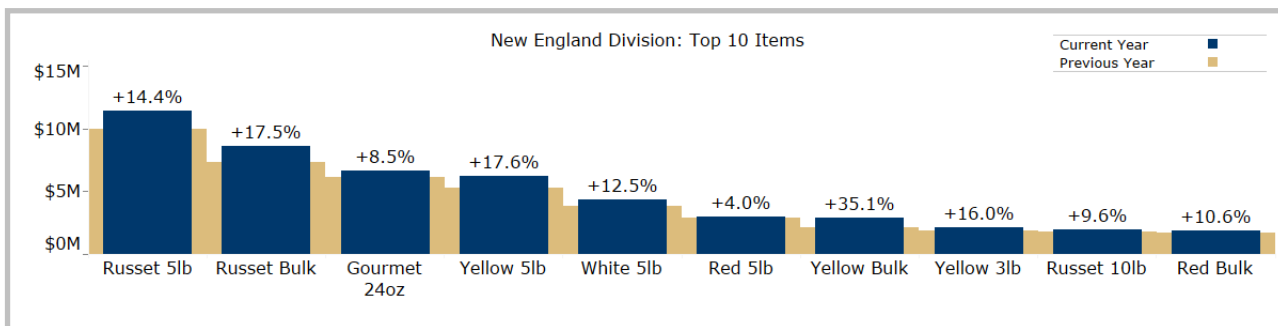
Q4 Performance: All Varieties

	Dollars	\$ Chg vs LY	\$ % Chg YoY	Volume (Lbs)	Vol. Chg vs LY	Vol. % Chg YoY	Avg Price/Lb	Price Per Lb Chg
Grand Total	\$56.6M	+\$5.7M	+11.3%	58.3M	+0.1M	+0.3%	\$0.97	+\$0.10
Russet	\$24.0M	+\$2.5M	+11.8%	27.5M	-0.9M	-3.1%	\$0.87	+\$0.12
Yellow	\$13.0M	+\$2.0M	+18.0%	13.3M	+1.2M	+9.9%	\$0.98	+\$0.07
Red	\$7.2M	+\$0.3M	+4.7%	6.7M	-0.2M	-2.4%	\$1.08	+\$0.07
Gourmet	\$6.6M	+\$0.5M	+8.5%	2.6M	+0.2M	+9.5%	\$2.57	-\$0.02
White	\$5.4M	+\$0.3M	+5.8%	8.1M	-0.2M	-2.5%	\$0.66	+\$0.05
Convenience	\$0.5M	+\$0.1M	+27.1%	0.1M	+0.0M	-7.6%	\$3.16	+\$0.86

All Varieties by Volume



Top 10 Items: All Varieties



2022 Q4: Pacific Division

Bulk Drives Division Pack Sizes

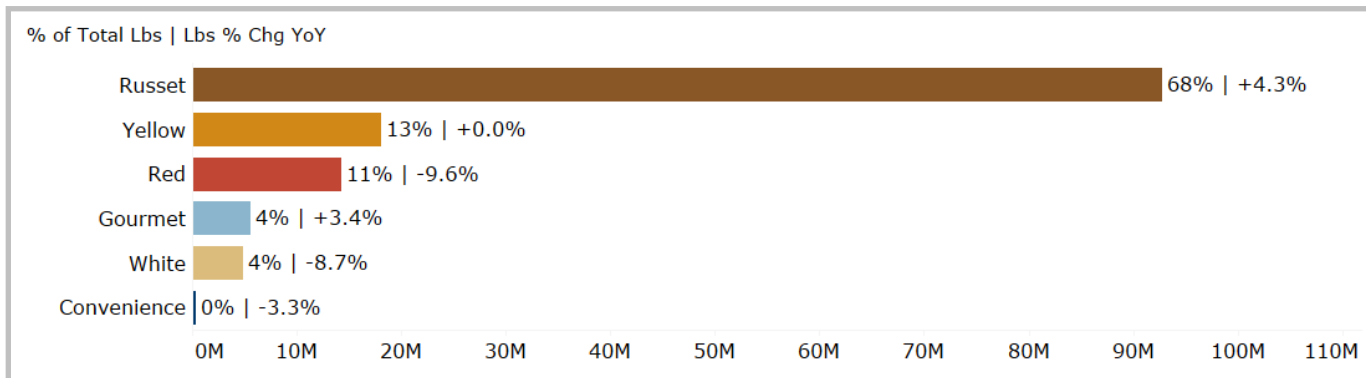
In Q4 2022, total russet dollars in the Pacific division were up +33.3%, while volume was up +4.3%. Reds saw the greatest volume declines of all varieties in the division, at -9.6%.

Bulks are the top selling pack size in the Pacific division overall, carrying 42% of total potato volume. Of russets, bulks are the top selling item in the division, posting a dollar increase of +34.0% compared to year ago. The Pacific is the only division in Q4 with bulk russets outperforming 5lb russets.

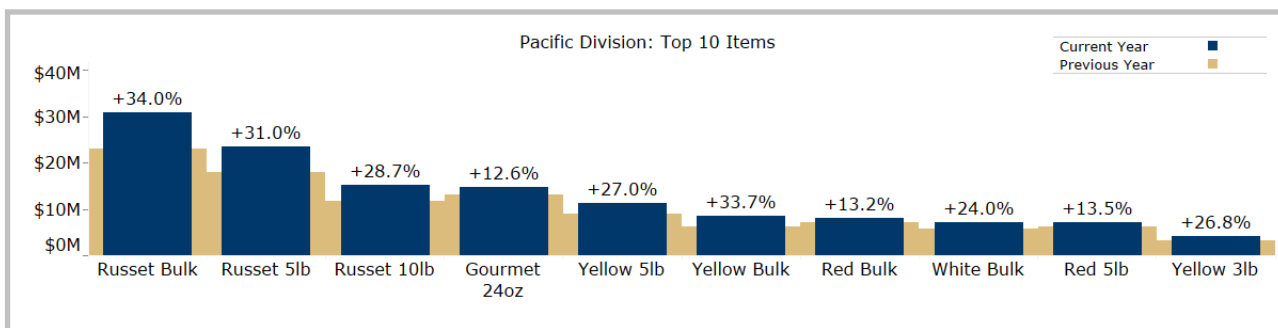
Q4 Performance: All Varieties

	Dollars	\$ Chg vs LY	\$ % Chg YoY	Volume (Lbs)	Vol. Chg vs LY	Vol. % Chg YoY	Avg Price/Lb	Price Per Lb Chg
Grand Total	\$138.5M	+\$28.4M	+25.8%	136.2M	+2.0M	+1.5%	\$1.02	+\$0.20
Russet	\$73.9M	+\$18.5M	+33.3%	92.8M	+3.8M	+4.3%	\$0.80	+\$0.17
Yellow	\$24.1M	+\$5.1M	+26.6%	18.1M	+0.0M	+0.0%	\$1.33	+\$0.28
Red	\$17.5M	+\$1.7M	+11.1%	14.3M	-1.5M	-9.6%	\$1.22	+\$0.23
Gourmet	\$14.7M	+\$1.6M	+12.6%	5.6M	+0.2M	+3.4%	\$2.63	+\$0.22
White	\$7.4M	+\$1.4M	+23.2%	4.9M	-0.5M	-8.7%	\$1.50	+\$0.39
Convenience	\$0.9M	+\$0.1M	+13.6%	0.4M	+0.0M	-3.3%	\$2.10	+\$0.31

All Varieties by Volume



Top 10 Items: All Varieties



2022 Q4: South Atlantic Division

5lb Bags Begin to Recover Volume Share

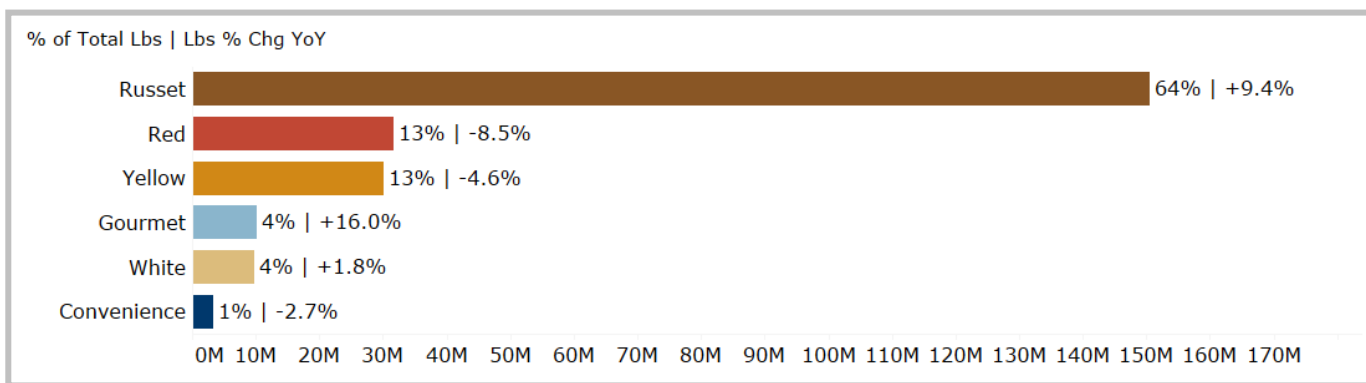
In Q4 2022, total russet dollars in the South Atlantic division were up +36.8%, while volume was up +9.4%. The South Atlantic is one of only two divisions of reds outperforming yellows in Q4, while both reds and yellows were down in Q4 in this division, at -8.5% and -4.6%.

Total 5lb bags are the top selling pack size in the South Atlantic division overall, carrying 44% of total potato volume. 5lb bags have fallen from 50% volume share in Q2, but are up from 43% in Q3.

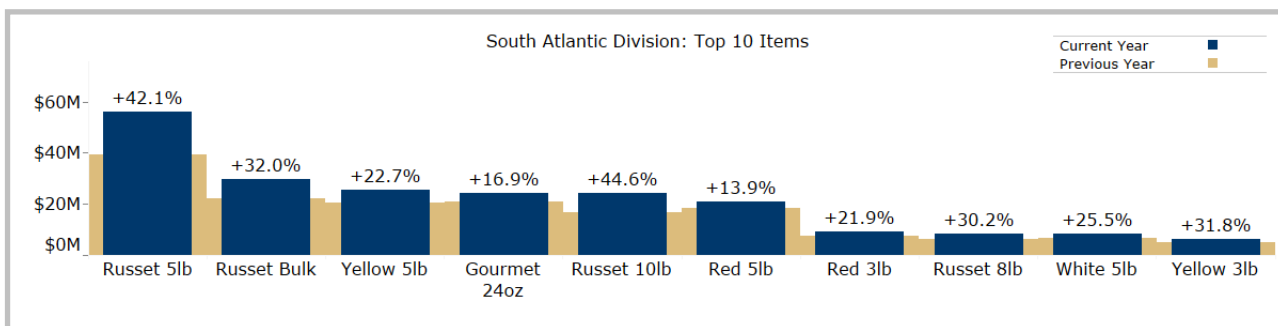
Q4 Performance: All Varieties

	Dollars	\$ Chg vs LY	\$ % Chg YoY	Volume (Lbs)	Vol. Chg vs LY	Vol. % Chg YoY	Avg Price/Lb	Price Per Lb Chg
Grand Total	\$246.3M	+\$54.3M	+28.3%	235.9M	+10.0M	+4.4%	\$1.04	+\$0.19
Russet	\$126.5M	+\$34.1M	+36.8%	150.6M	+12.9M	+9.4%	\$0.84	+\$0.17
Red	\$38.0M	+\$5.0M	+15.1%	31.7M	-3.0M	-8.5%	\$1.20	+\$0.25
Yellow	\$36.9M	+\$6.5M	+21.4%	30.2M	-1.5M	-4.6%	\$1.22	+\$0.26
Gourmet	\$24.4M	+\$3.5M	+16.9%	10.2M	+1.4M	+16.0%	\$2.39	+\$0.02
White	\$10.8M	+\$3.1M	+39.8%	9.8M	+0.2M	+1.8%	\$1.10	+\$0.30
Convenience	\$9.8M	+\$2.2M	+28.3%	3.4M	-0.1M	-2.7%	\$2.89	+\$0.70

All Varieties by Volume



Top 10 Items: All Varieties



2022 Q4: West North Central Division

Reds Lose Market Share to Yellows

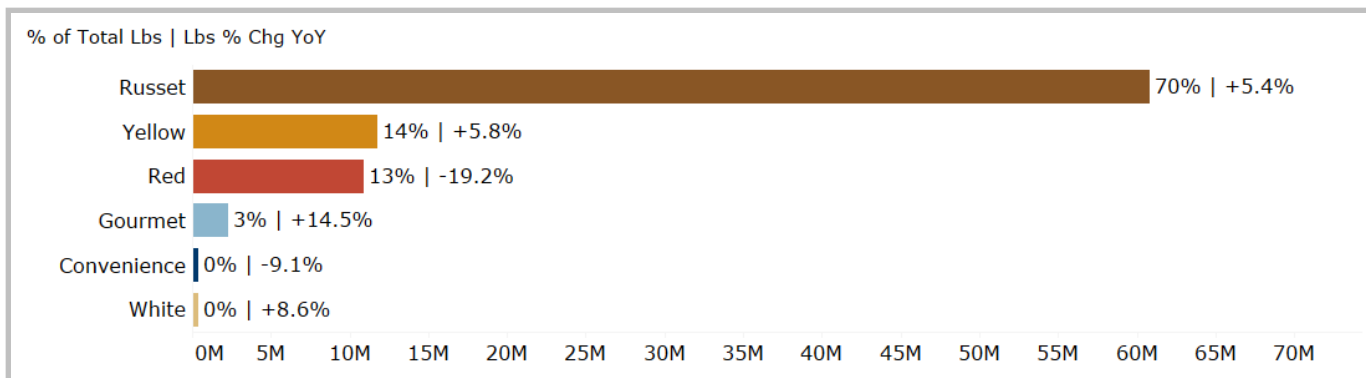
In Q4 2022, total russet dollars in the W.N. Central division were up +34.3%, while volume was up +5.4%. Reds are the only variety in the division that experienced dollar and volume decreases this quarter.

Total 5lb bags are the top selling pack size in the W.N. Central 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 +35.3% compared to year ago.

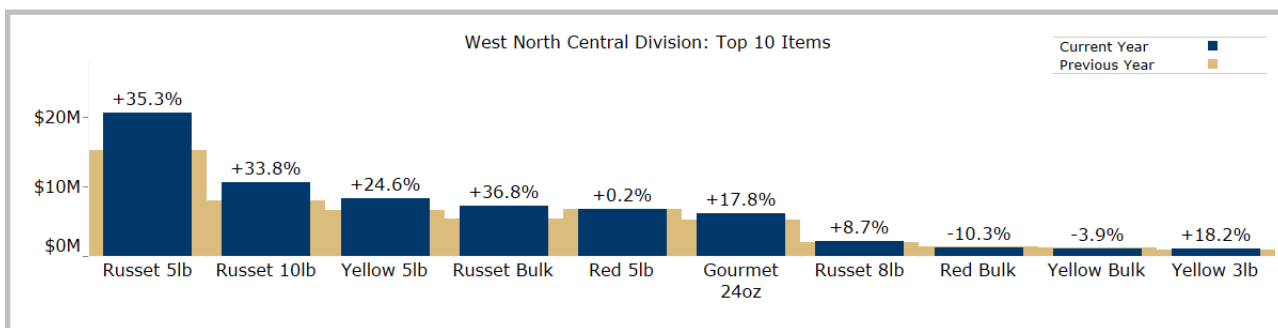
Q4 Performance: All Varieties

	Dollars	\$ Chg vs LY	\$ % Chg YoY	Volume (Lbs)	Vol. Chg vs LY	Vol. % Chg YoY	Avg Price/Lb	Price Per Lb Chg
Grand Total	\$71.0M	+\$13.2M	+22.8%	86.6M	+1.4M	+1.7%	\$0.82	+\$0.14
Russet	\$42.1M	+\$10.8M	+34.3%	60.9M	+3.1M	+5.4%	\$0.69	+\$0.15
Yellow	\$11.5M	+\$1.8M	+19.1%	11.8M	+0.6M	+5.8%	\$0.98	+\$0.11
Red	\$9.8M	-\$0.5M	-5.2%	10.9M	-2.6M	-19.2%	\$0.90	+\$0.13
Gourmet	\$6.1M	+\$0.9M	+17.8%	2.3M	+0.3M	+14.5%	\$2.69	+\$0.07
Convenience	\$1.0M	+\$0.1M	+13.0%	0.4M	+0.0M	-9.1%	\$2.26	+\$0.44
White	\$0.5M	+\$0.1M	+19.9%	0.4M	+0.0M	+8.6%	\$1.36	+\$0.13

All Varieties by Volume



Top 10 Items: All Varieties



2022 Q4: West South Central Division

Russet Volume Outperforms Total US

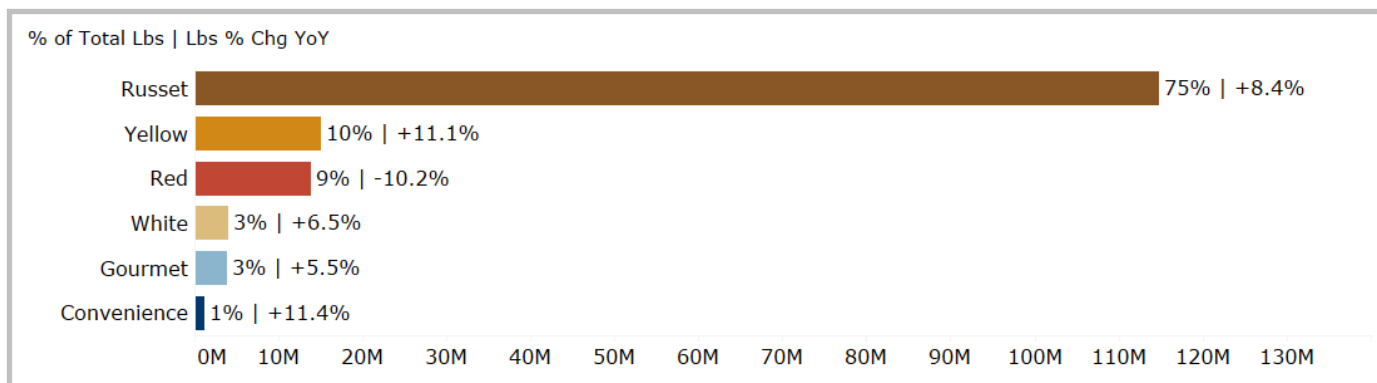
In Q4 2022, total russet dollars in the W.S. Central division were up +41.5%, while volume was up +8.4%. While all varieties gained in Q4 dollar sales, Reds fell -10.2% in volume.

5lb bags in the total category are the top selling pack size in the W.S. Central division overall, carrying 38% 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 +53.0% compared to year ago.

Q4 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	\$125.3M	+\$31.7M	+33.8%	153.1M	+9.4M	+6.6%	\$0.82	+\$0.17
Russet	\$76.6M	+\$22.5M	+41.5%	114.9M	+8.9M	+8.4%	\$0.67	+\$0.16
Yellow	\$15.2M	+\$4.2M	+38.4%	15.1M	+1.5M	+11.1%	\$1.01	+\$0.20
Red	\$14.7M	+\$1.1M	+8.2%	13.9M	-1.6M	-10.2%	\$1.06	+\$0.18
Gourmet	\$10.7M	+\$1.6M	+17.2%	3.9M	+0.2M	+5.5%	\$2.77	+\$0.28
White	\$5.8M	+\$1.8M	+45.6%	4.0M	+0.2M	+6.5%	\$1.45	+\$0.39
Convenience	\$2.3M	+\$0.5M	+26.5%	1.3M	+0.1M	+11.4%	\$1.83	+\$0.22

All Varieties by Volume



Top 10 Items: All Varieties

