



2023 Q1

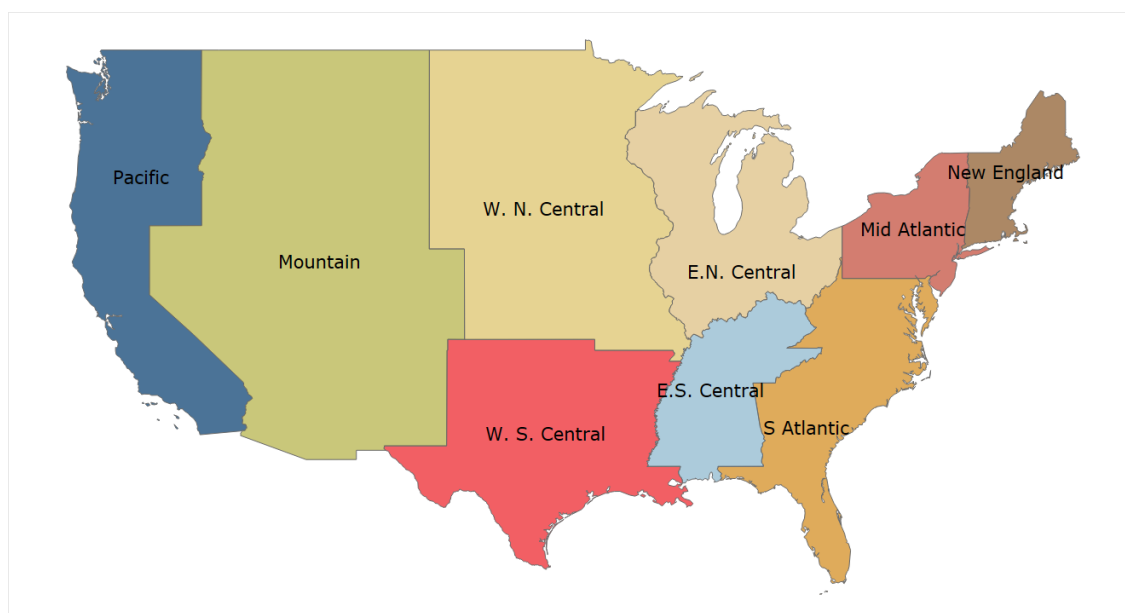
# Potato Category Review

Idaho Potato Commission

# 2023 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 Jan 1 - April 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 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, January - March, 2023



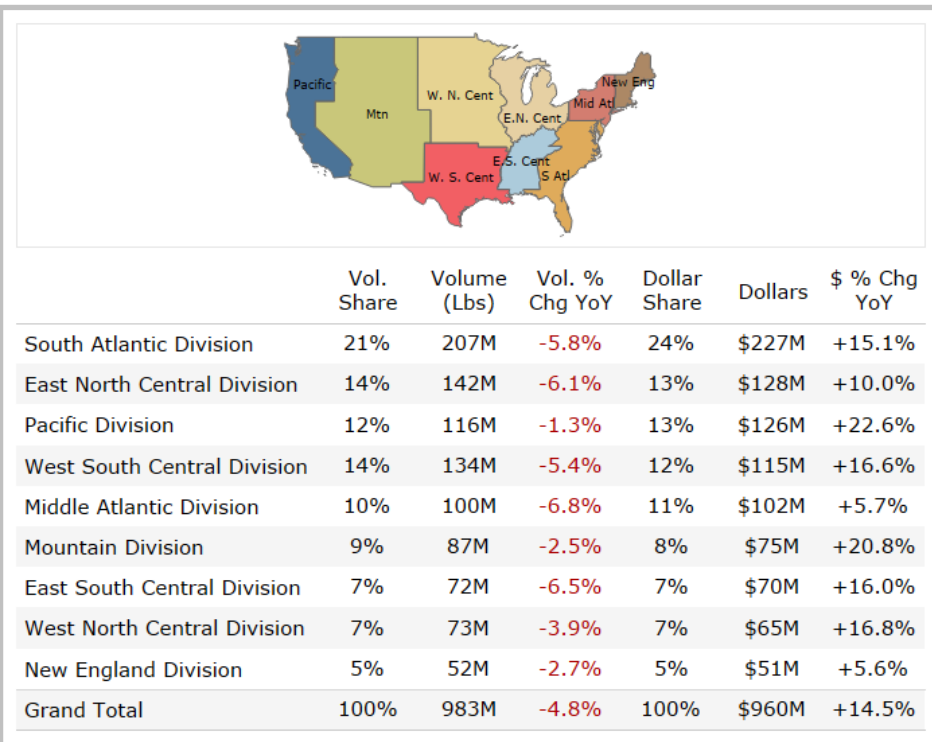
# 2023 Q1: Total US

## Pacific Division Leads in Q1 Dollar Growth

All nine divisions gained in dollars at retail in Q1. As a category total, potatoes posted dollar growth this quarter of +14.5%.

Four of the nine divisions gained dollar share in 2022 over the previous year, with the Pacific Division leading at +0.9% share growth. The division also had the greatest dollar growth at +22.6%.

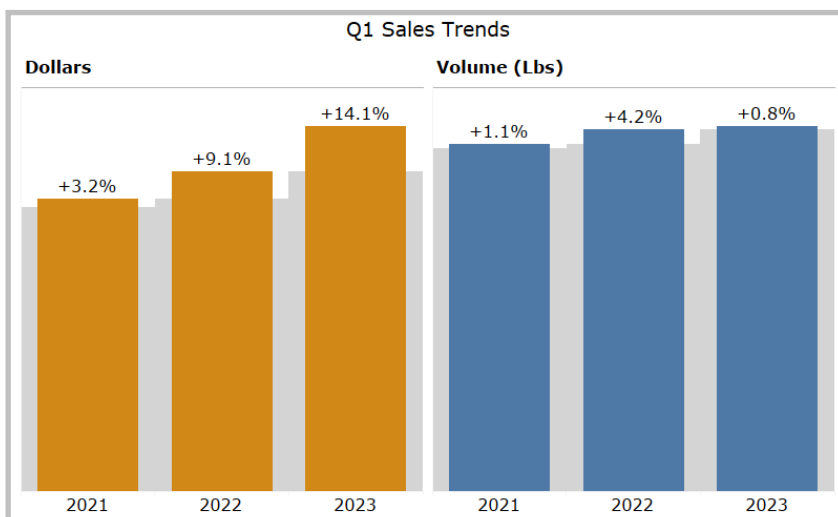
In the Total US, 5lb russets are the top performing variety and continue to gain dollar and volume share every year. In 2023 Q1, the pack size grew +18.9% in dollars over the same period last year.



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.

## Yellow Potatoes Lead in Q1 Volume Growth

Idaho is the largest supplier of yellow potatoes in the country. Yellows have the greatest Q1 volume growth of any top variety over the past 3 years. Comparing this past quarter to the prior year for the Total US, yellows are up +0.8% in volume (lbs) growth. Over the past year, yellow potatoes have switched places with reds, becoming the second largest variety by dollar sales in the country.



# Idaho Potato Lovers 2023



## Big Displays and Bigger Sales During PLM

The Idaho Potato Commission's annual Potato Lovers Month (PLM) promotion kicked off on Feb 1 and wrapped up on April 15. Every year, retailers are encouraged to create eye-catching displays to showcase Idaho potatoes in their stores, with some great incentives for participation. This year, prizes include a toaster oven for all participants, cash prizes for top displays, and a trip to the Atlantis Resort in the Bahamas.

Speaking to the success of this year's promotion, Ross Johnson, VP of Retail and International, said

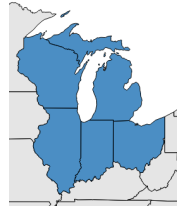
"The Idaho Potato Commission was shocked that Potato Lover's Month entries increased by 22.4% this year! Even though we had a short crop and prices were elevated (+20%) retailers were able to capitalize on secondary potato displays to elevate their category sales."

Reach out to your IPC retail promotion director to learn more about what retail data tells of the success of PLM in your market.

Potato Lovers prizes will be announced at [idahopotatoes.com](http://idahopotatoes.com) on June 15.



# 2023 Q1: East North Central Division



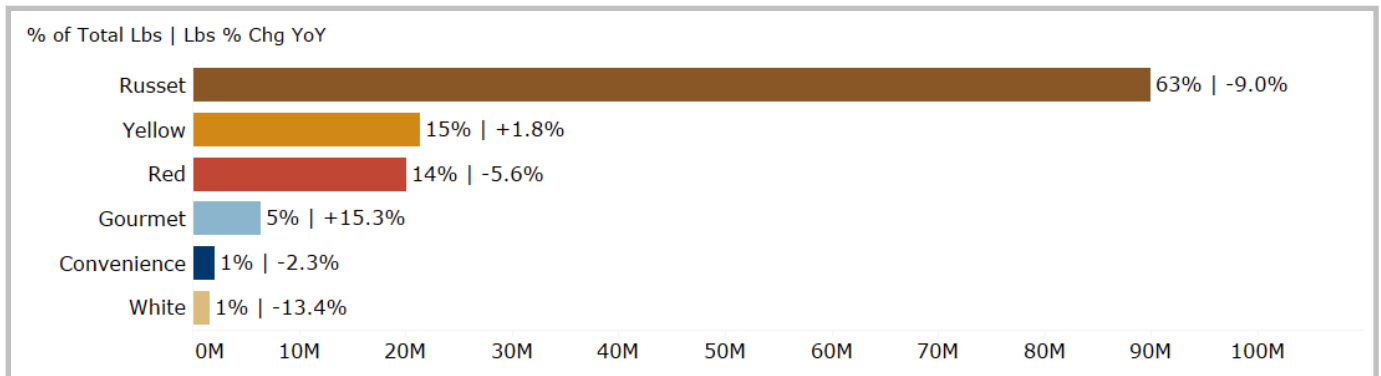
## Yellows Pass Reds in Q1 Volume

In Q1 2023, total russet dollars in the E.N. Central division was up +12.7%, while volume was down -9.0%. All varieties except white potatoes are up in dollars, while only gourmets and yellows gained in volume. 5lb bags in the total category are the top selling pack size in the E.N. Central division overall, carrying 45% of total potato volume. Of the 5lb pack sizes, russet 5lb is the top selling item in the division, posting a dollar increase of +15.2% compared to year ago.

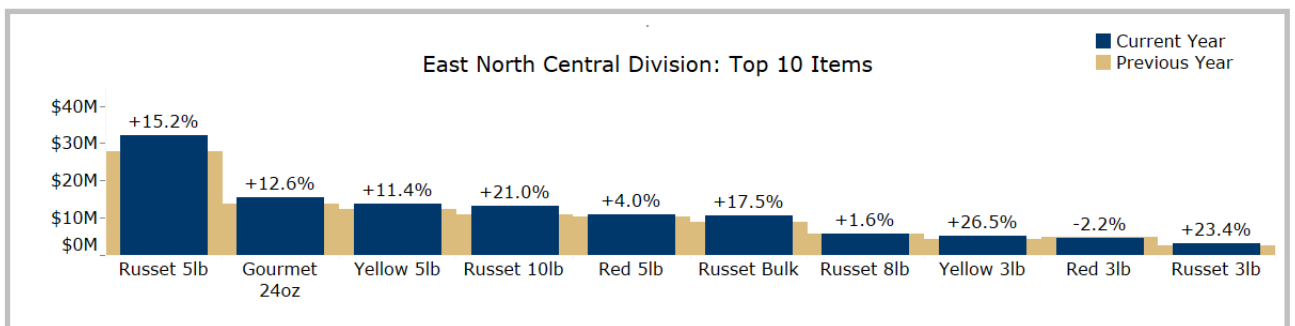
### Q1 Performance: All Varieties

	Dollars	Dollars % Chg YoY	Volume (Lbs)	Volume % Chg YoY	Avg Price/Lb	Avg Price/Lb Chg YoY
<b>Grand Total</b>	<b>\$127.9M</b>	<b>+10.0%</b>	<b>141.8M</b>	<b>-6.1%</b>	<b>\$0.90</b>	<b>+\$0.13</b>
Russet	\$66.6M	+12.7%	90.0M	-9.0%	\$0.74	+\$0.14
Yellow	\$20.8M	+10.8%	21.4M	+1.8%	\$0.97	+\$0.08
Red	\$18.7M	+1.6%	20.1M	-5.6%	\$0.93	+\$0.07
Gourmet	\$15.5M	+12.6%	6.5M	+15.3%	\$2.40	-\$0.06
Convenience	\$4.2M	+4.8%	2.1M	-2.3%	\$1.98	+\$0.13
White	\$2.1M	-4.4%	1.7M	-13.4%	\$1.21	+\$0.12

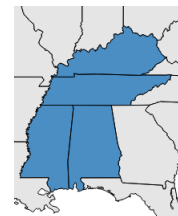
### All Varieties by Volume



### Top 10 Items: All Varieties



# 2023 Q1: East South Central Division



## Gourmets Remain Steady in Price and Up in Volume

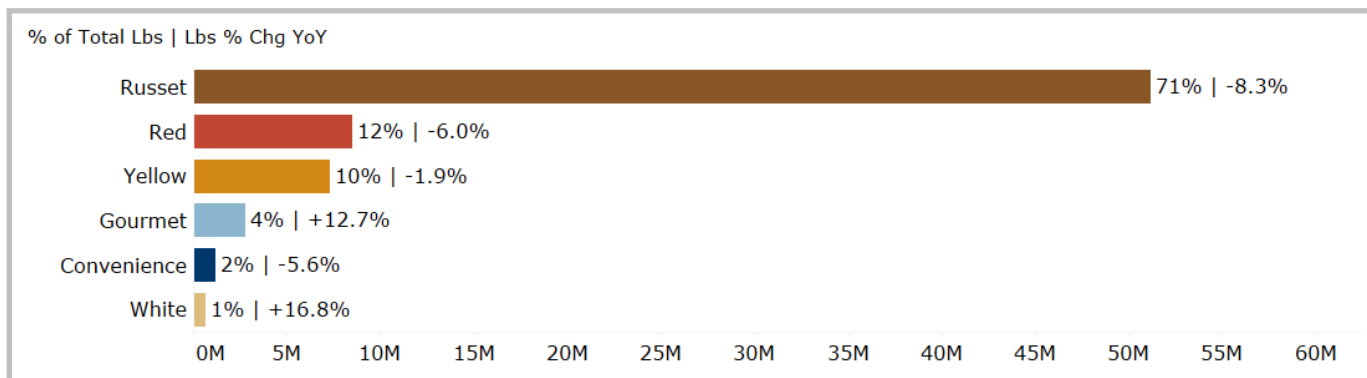
In Q1 2022, total russet dollars in the E.S. Central division were up +18.8%, and volume fell -8.3%.

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 +29.3% and a volume increase of +1.8% compared to year ago.

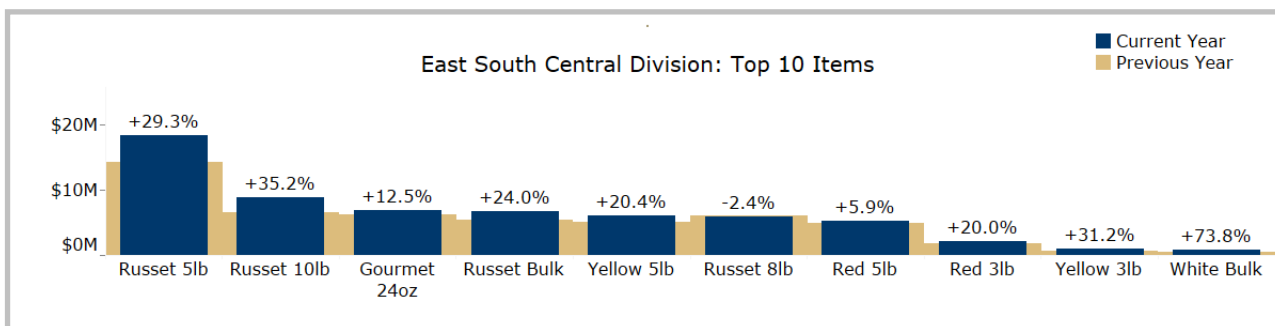
### Q1 Performance: All Varieties

	Dollars	Dollars % Chg YoY	Volume (Lbs)	Volume % Chg YoY	Avg Price/Lb	Avg Price/Lb Chg YoY
<b>Grand Total</b>	<b>\$69.9M</b>	<b>+16.0%</b>	<b>71.6M</b>	<b>-6.5%</b>	<b>\$0.98</b>	<b>+\$0.19</b>
Russet	\$42.9M	+18.8%	51.2M	-8.3%	\$0.84	+\$0.19
Red	\$8.6M	+4.9%	8.5M	-6.0%	\$1.02	+\$0.11
Yellow	\$7.9M	+16.0%	7.3M	-1.9%	\$1.08	+\$0.17
Gourmet	\$6.9M	+12.5%	2.8M	+12.7%	\$2.48	+\$0.00
Convenience	\$2.6M	+9.1%	1.2M	-5.6%	\$2.23	+\$0.30
White	\$1.0M	+59.0%	0.7M	+16.8%	\$1.44	+\$0.38

### All Varieties by Volume



### Top 10 Items: All Varieties



# 2023 Q1: Middle Atlantic Division



## Yellows Gain Volume, While Reds and Russets Fall

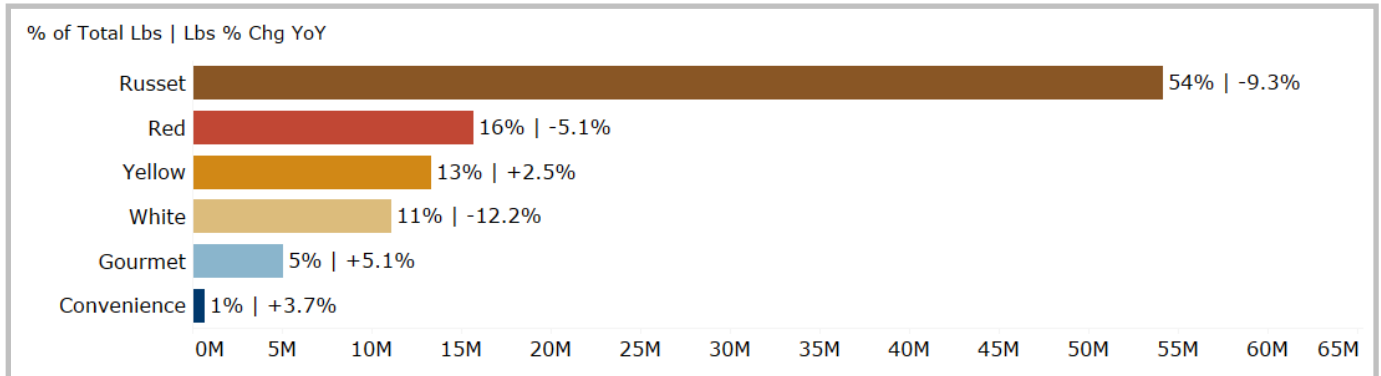
In Q1 2022, total russet dollars in the Mid Atlantic division were up +7.4%, while volume was down -9.3%. Yellows, gourmet, and convenience are the only varieties up in volume and dollars this quarter.

5lb bags in the total category are the top selling pack size in the Mid Atlantic division overall. They carry 48% of total potato volume, down from 51% 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 +16.6% compared to Q1 2022.

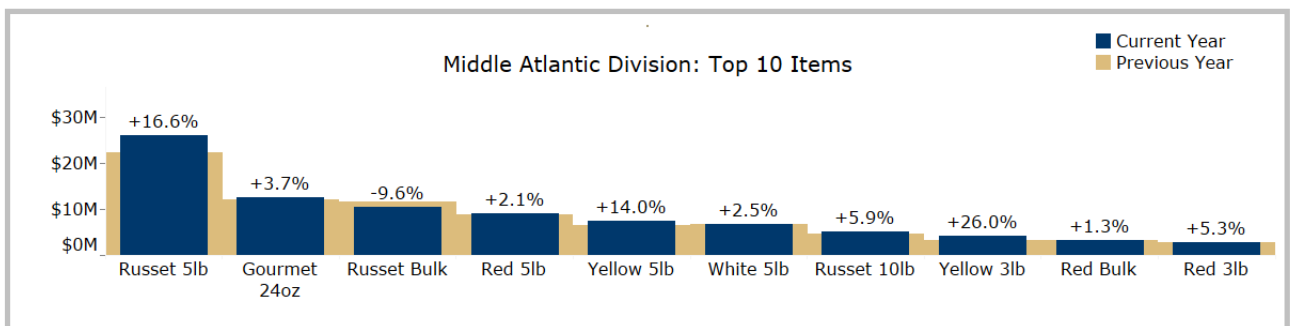
### Q1 Performance: All Varieties

	Dollars	Dollars % Chg YoY	Volume (Lbs)	Volume % Chg YoY	Avg Price/Lb	Avg Price/Lb Chg YoY
<b>Grand Total</b>	<b>\$102.2M</b>	<b>+5.7%</b>	<b>100.2M</b>	<b>-6.8%</b>	<b>\$1.02</b>	<b>+\$0.12</b>
Russet	\$46.4M	+7.4%	54.2M	-9.3%	\$0.86	+\$0.13
Red	\$17.1M	+3.7%	15.7M	-5.1%	\$1.09	+\$0.09
Yellow	\$15.3M	+9.8%	13.3M	+2.5%	\$1.15	+\$0.08
Gourmet	\$12.6M	+3.7%	5.1M	+5.1%	\$2.48	-\$0.03
White	\$8.6M	-3.1%	11.1M	-12.2%	\$0.78	+\$0.07
Convenience	\$2.1M	+10.9%	0.7M	+3.7%	\$3.01	+\$0.20

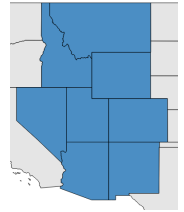
### All Varieties by Volume



### Top 10 Items: All Varieties



# 2023 Q1: Mountain Division



## Mountain Division Sales Outpace Total US

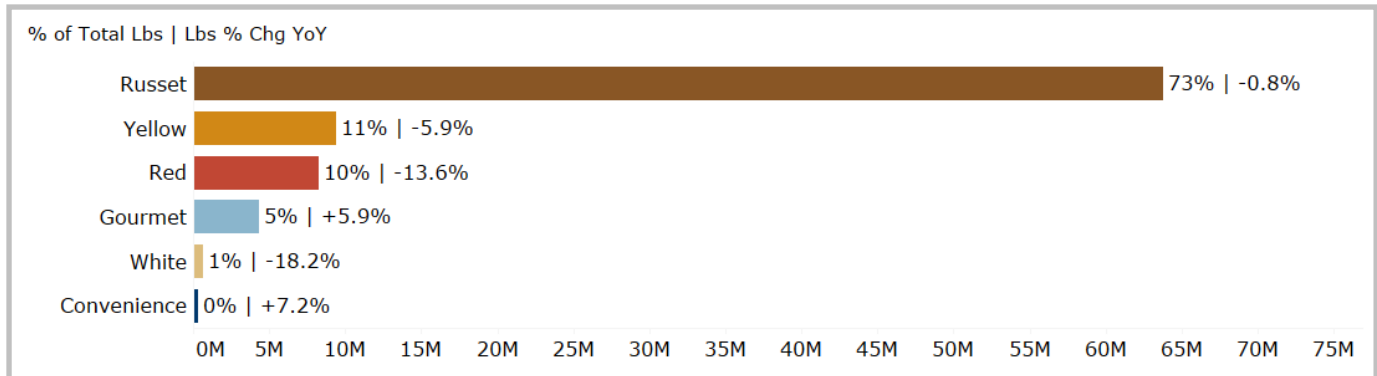
In Q1 2023, total russet dollars in the Mountain division were up +30.8%, while volume was down -0.8%. While the Mountain division makes up just 9% of total volume in the US, it surpasses Total US in both dollar and volume year-over-year change in Q1.

5lb bags in the category total are the top selling pack size in the Mountain division overall, carrying 38% of total potato volume. 5lb russets are the top performing item in this division, up +40.0% in dollars and +6.3% in volume in Q1.

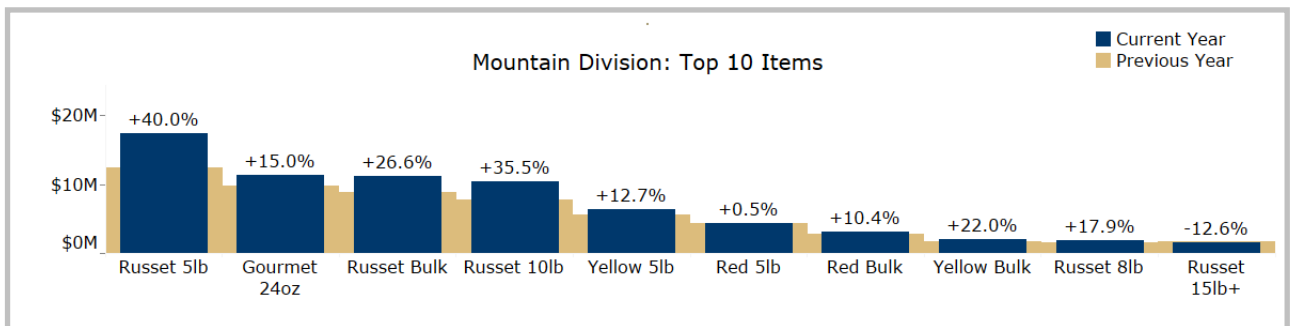
### Q1 Performance: All Varieties

	Dollars	Dollars % Chg YoY	Volume (Lbs)	Volume % Chg YoY	Avg Price/Lb	Avg Price/Lb Chg YoY
<b>Grand Total</b>	<b>\$75.1M</b>	<b>+20.8%</b>	<b>86.8M</b>	<b>-2.5%</b>	<b>\$0.87</b>	<b>+\$0.17</b>
Russet	\$43.5M	+30.8%	63.8M	-0.8%	\$0.68	+\$0.16
Gourmet	\$11.3M	+15.0%	4.4M	+5.9%	\$2.59	+\$0.20
Yellow	\$10.1M	+12.3%	9.4M	-5.9%	\$1.07	+\$0.17
Red	\$8.7M	+2.9%	8.3M	-13.6%	\$1.05	+\$0.17
White	\$0.9M	-18.0%	0.6M	-18.2%	\$1.40	+\$0.00
Convenience	\$0.6M	+15.1%	0.3M	+7.2%	\$2.19	+\$0.15

### All Varieties by Volume



### Top 10 Items: All Varieties





# 2023 Q1: New England Division



## Yellows and Reds Outpace Russet Growth

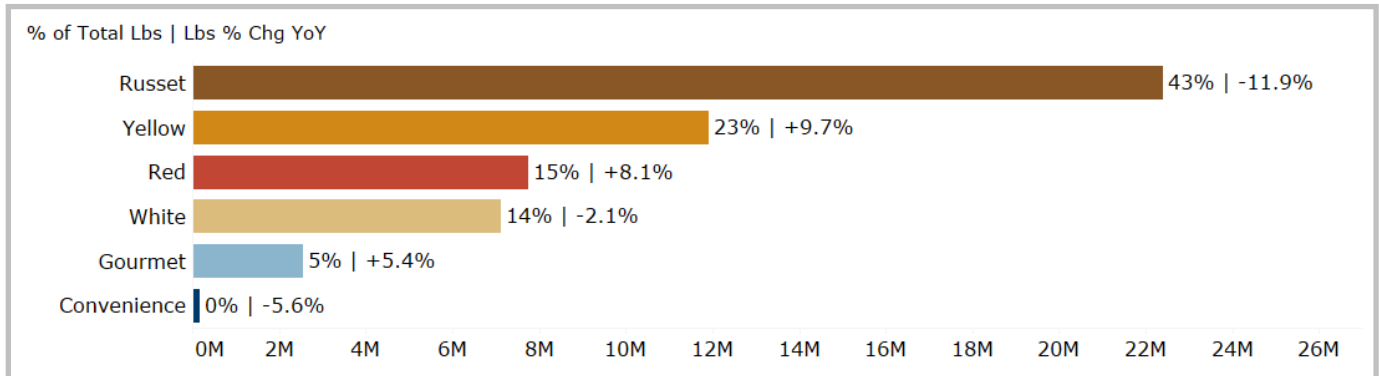
In Q1 2023, total russet dollars in the New England division were up +3.3%, while volume was down -11.9%. Yellows and reds are up in volume in this division, at +9.7% and +8.1%.

5lb bags and bulk are the top selling pack sizes in the New England division overall, carrying 42% and 26% of total potato volume, respectively. In russets, the 5lb bag is the best selling pack size, although posting Q1 loses of -3.8% in dollar sales over the prior year.

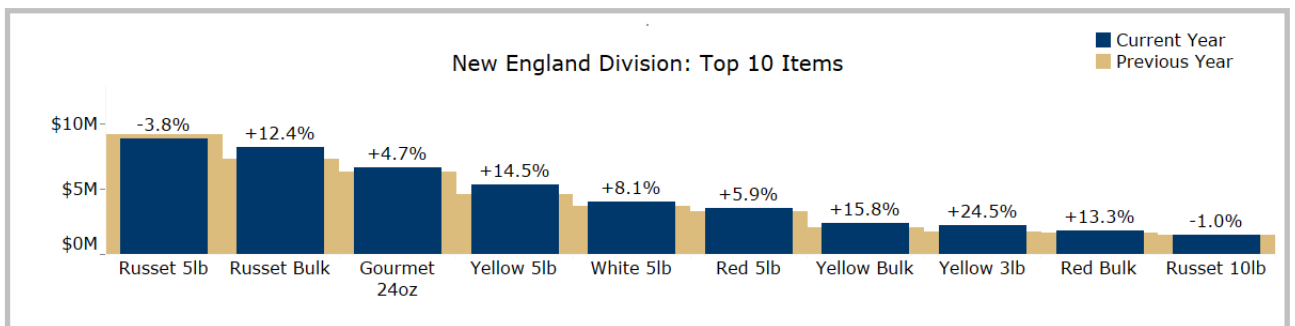
### Q1 Performance: All Varieties

	Dollars	Dollars % Chg YoY	Volume (Lbs)	Volume % Chg YoY	Avg Price/Lb	Avg Price/Lb Chg YoY
<b>Grand Total</b>	<b>\$51.2M</b>	<b>+5.6%</b>	<b>51.9M</b>	<b>-2.7%</b>	<b>\$0.99</b>	<b>+\$0.08</b>
Russet	\$20.4M	+3.3%	22.4M	-11.9%	\$0.91	+\$0.13
Yellow	\$11.5M	+12.6%	11.9M	+9.7%	\$0.96	+\$0.03
Red	\$7.6M	+7.1%	7.8M	+8.1%	\$0.97	-\$0.01
Gourmet	\$6.7M	+4.7%	2.6M	+5.4%	\$2.59	-\$0.02
White	\$4.7M	-0.4%	7.1M	-2.1%	\$0.66	+\$0.01
Convenience	\$0.4M	-0.4%	0.2M	-5.6%	\$2.73	+\$0.14

### All Varieties by Volume



### Top 10 Items: All Varieties



# 2023 Q1: Pacific Division



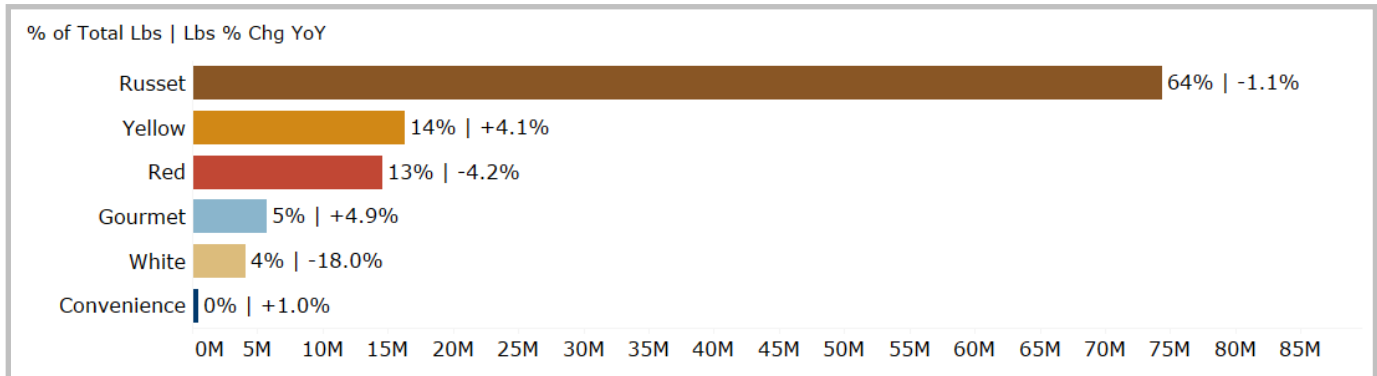
## Bulk Continues to Lead Among Pack Sizes

In Q1 2023, total russet dollars in the Pacific division were up +32.1%, while volume was down -1.1%. Gourmet (24oz) potatoes saw the greatest volume increase among all varieties in the division, at +4.9%. Bulks are the top selling pack size in the Pacific division overall, carrying 41% of total potato volume. Of russets, bulks are the top selling item in the division, posting a dollar increase of +36.0% compared to year ago. The Pacific is the only division in Q1 with bulk russets outperforming 5lb russets.

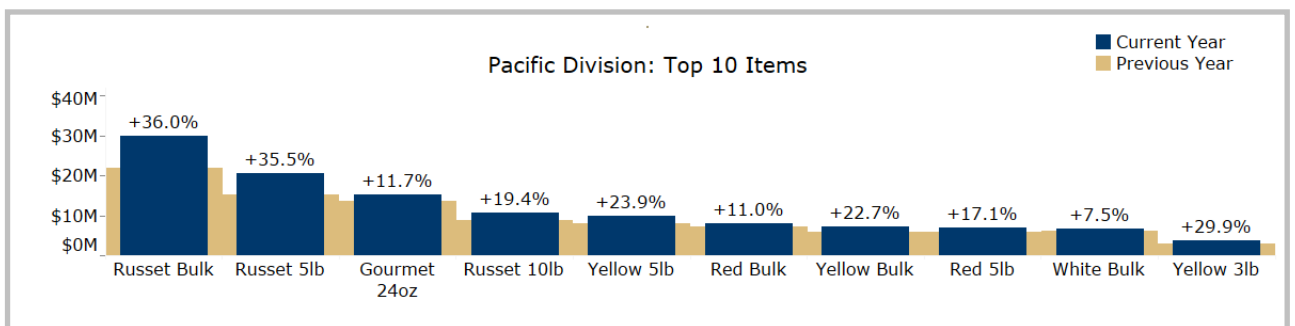
### Q1 Performance: All Varieties

	Dollars	Dollars % Chg YoY	Volume (Lbs)	Volume % Chg YoY	Avg Price/Lb	Avg Price/Lb Chg YoY
<b>Grand Total</b>	<b>\$125.9M</b>	<b>+22.6%</b>	<b>115.5M</b>	<b>-1.3%</b>	<b>\$1.09</b>	<b>+\$0.21</b>
Russet	\$64.7M	+32.1%	74.4M	-1.1%	\$0.87	+\$0.22
Yellow	\$21.0M	+21.5%	16.3M	+4.1%	\$1.29	+\$0.18
Red	\$17.2M	+10.7%	14.6M	-4.2%	\$1.18	+\$0.16
Gourmet	\$15.3M	+11.7%	5.7M	+4.9%	\$2.68	+\$0.16
White	\$6.7M	+4.6%	4.1M	-18.0%	\$1.64	+\$0.35
Convenience	\$1.0M	+22.0%	0.5M	+1.0%	\$2.15	+\$0.37

### All Varieties by Volume



### Top 10 Items: All Varieties



# 2023 Q1: South Atlantic Division



## The South Atlantic Loves Red Potatoes

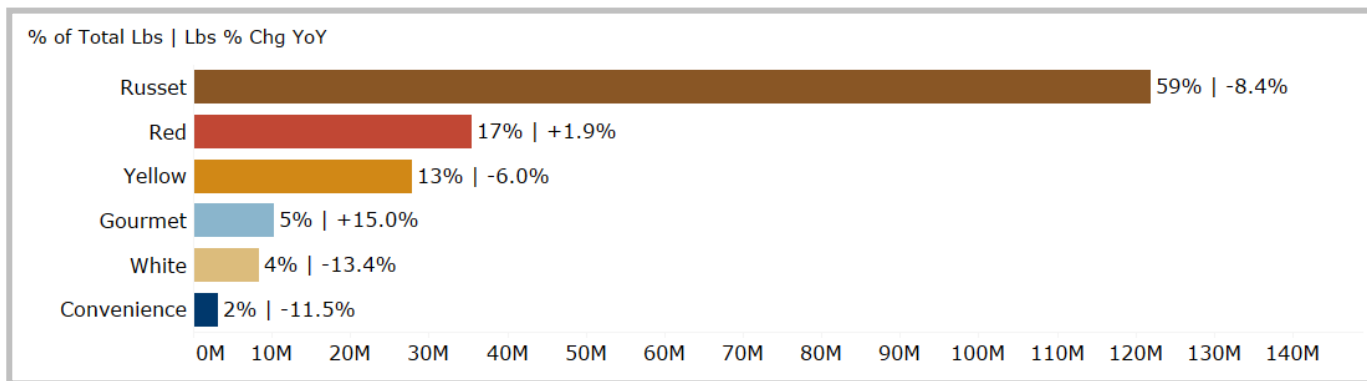
In Q1 2023, total russet dollars in the South Atlantic division were up +18.8%, while volume was down -8.4%. In the Total US this quarter, yellows gained in volume but reds declined, however the opposite is true in this division.

Total 5lb bags are the top selling pack size in the South Atlantic division overall, carrying 43% of total potato volume. 5lb bags have fallen from 45% volume share in 2022 Q4.

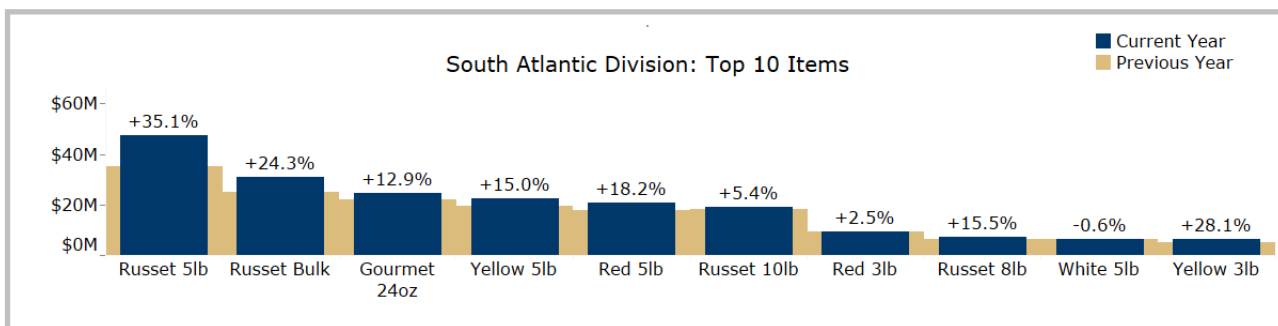
### Q1 Performance: All Varieties

	Dollars	Dollars % Chg YoY	Volume (Lbs)	Volume % Chg YoY	Avg Price/Lb	Avg Price/Lb Chg YoY
<b>Grand Total</b>	<b>\$227.5M</b>	<b>+15.1%</b>	<b>207.4M</b>	<b>-5.8%</b>	<b>\$1.10</b>	<b>+\$0.20</b>
Russet	\$113.2M	+18.8%	122.0M	-8.4%	\$0.93	+\$0.21
Red	\$38.1M	+10.6%	35.4M	+1.9%	\$1.08	+\$0.09
Yellow	\$33.1M	+12.4%	27.9M	-6.0%	\$1.18	+\$0.19
Gourmet	\$24.7M	+12.9%	10.3M	+15.0%	\$2.41	-\$0.05
White	\$9.3M	+20.2%	8.5M	-13.4%	\$1.10	+\$0.31
Convenience	\$9.0M	+2.9%	3.2M	-11.5%	\$2.79	+\$0.39

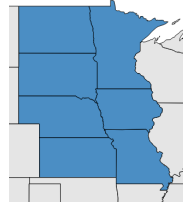
### All Varieties by Volume



### Top 10 Items: All Varieties



# 2023 Q1: West North Central Division



## Yellow and Gourmet Potatoes Lead Volume Growth

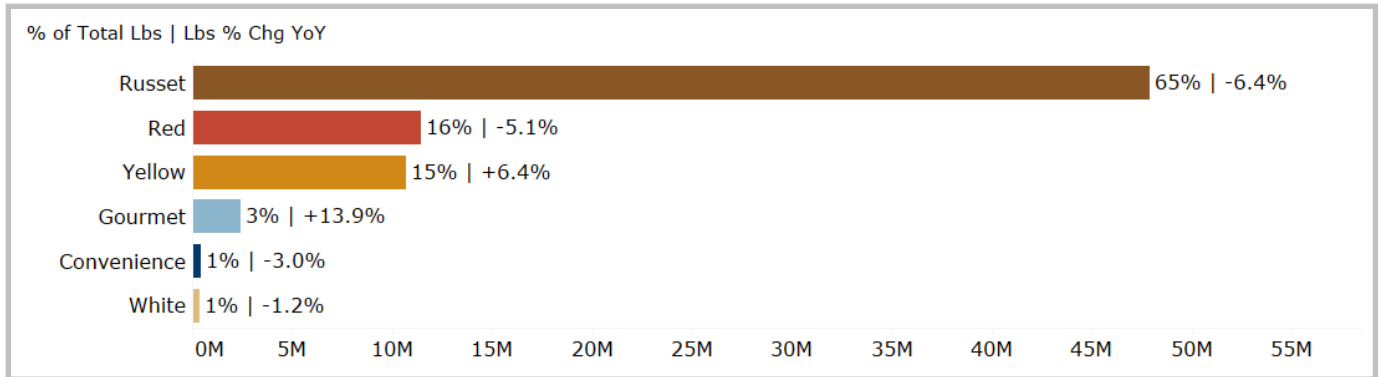
In Q1 2023, total russet dollars in the W.N. Central division were up +21.7%, while volume was down -6.4%. Yellows and gourmet are the only varieties in the division that experienced both dollar and volume increases this quarter.

Total 5lb bags are 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 item is the top selling item in the division, posting a dollar increase of +24.7% compared to 2022 Q1.

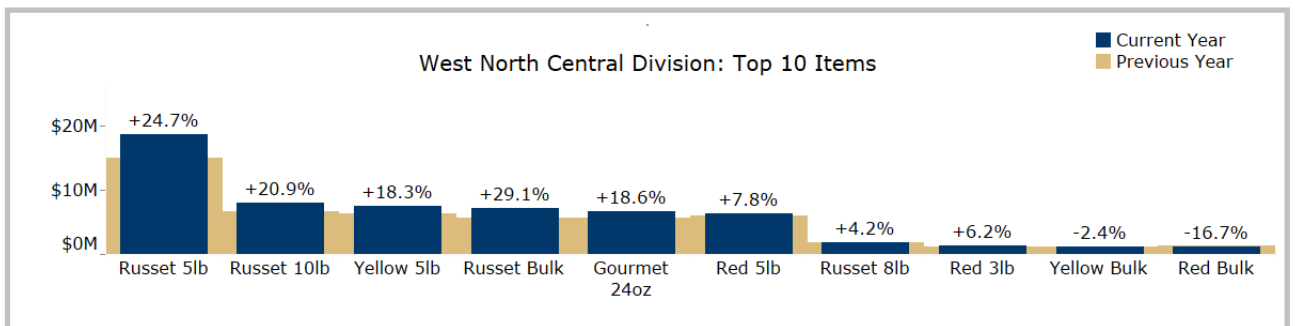
### Q1 Performance: All Varieties

	Dollars	Dollars % Chg YoY	Volume (Lbs)	Volume % Chg YoY	Avg Price/Lb	Avg Price/Lb Chg YoY
<b>Grand Total</b>	<b>\$65.1M</b>	<b>+16.8%</b>	<b>73.3M</b>	<b>-3.9%</b>	<b>\$0.89</b>	<b>+\$0.16</b>
Russet	\$36.8M	+21.7%	47.9M	-6.4%	\$0.77	+\$0.18
Yellow	\$10.4M	+14.0%	10.7M	+6.4%	\$0.97	+\$0.06
Red	\$9.8M	+3.4%	11.5M	-5.1%	\$0.85	+\$0.07
Gourmet	\$6.7M	+18.6%	2.4M	+13.9%	\$2.76	+\$0.11
Convenience	\$1.0M	+16.8%	0.5M	-3.0%	\$2.16	+\$0.37
White	\$0.5M	+2.3%	0.4M	-1.2%	\$1.24	+\$0.04

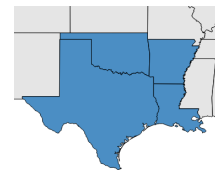
### All Varieties by Volume



### Top 10 Items: All Varieties



# 2023 Q1: West South Central Division



## 5lb Russets Remain Strong in Q1 Sales

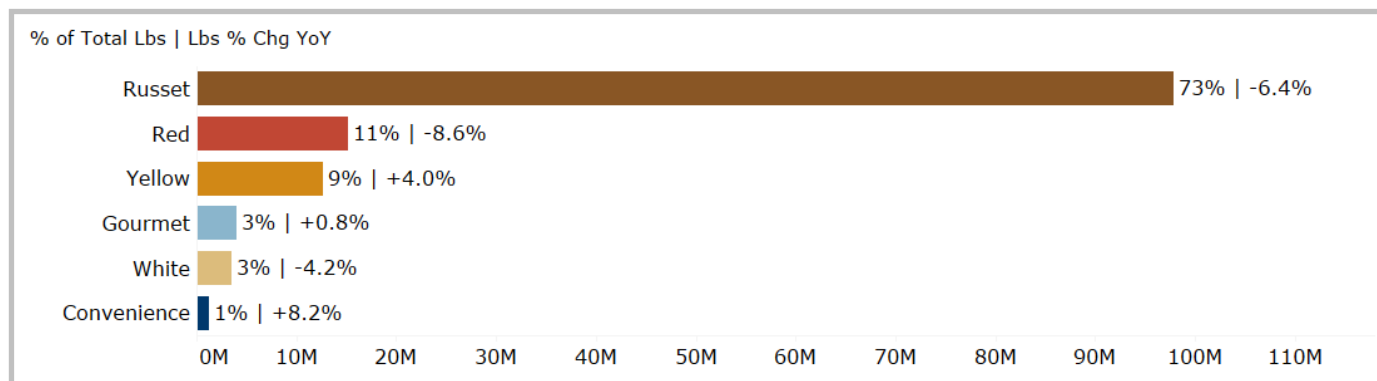
In Q1 2023, total russet dollars in the W.S. Central division were up +21.5%, while volume was down -6.4%. While all varieties gained in Q1 dollar sales, yellows, gourmets, and whites were the only varieties to gain in volume over the prior year.

5lb bags in the total category are the top selling pack size in the W.S. Central division overall, carrying 37% 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 +34.7% compared to year ago.

### Q1 Performance: All Varieties

	Dollars	Dollars % Chg YoY	Volume (Lbs)	Volume % Chg YoY	Avg Price/Lb	Avg Price/Lb Chg YoY
<b>Grand Total</b>	<b>\$114.8M</b>	<b>+16.6%</b>	<b>134.4M</b>	<b>-5.4%</b>	<b>\$0.85</b>	<b>+\$0.16</b>
Russet	\$67.9M	+21.5%	97.8M	-6.4%	\$0.69	+\$0.16
Red	\$15.2M	+0.6%	15.1M	-8.6%	\$1.01	+\$0.09
Yellow	\$12.7M	+20.4%	12.6M	+4.0%	\$1.01	+\$0.14
Gourmet	\$11.1M	+9.1%	4.0M	+0.8%	\$2.81	+\$0.21
White	\$5.6M	+14.5%	3.5M	-4.2%	\$1.58	+\$0.26
Convenience	\$2.4M	+24.2%	1.3M	+8.2%	\$1.81	+\$0.23

### All Varieties by Volume



### Top 10 Items: All Varieties

