



2024 Q1

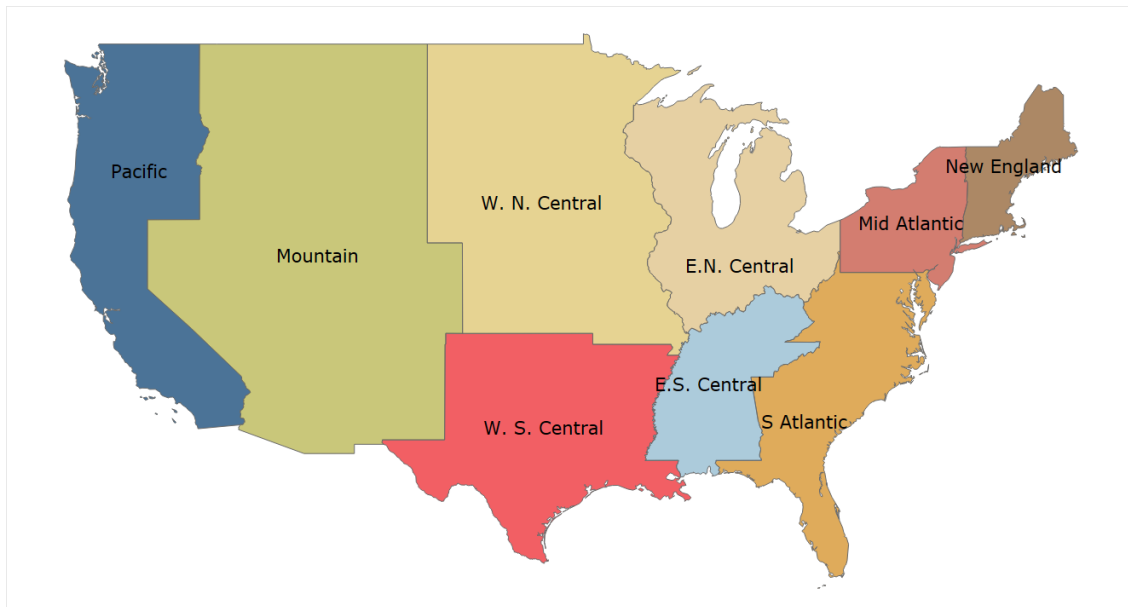
# Potato Category Review

Idaho Potato Commission

# 2024 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 January 1 - March 31, 2024 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, January - March, 2024

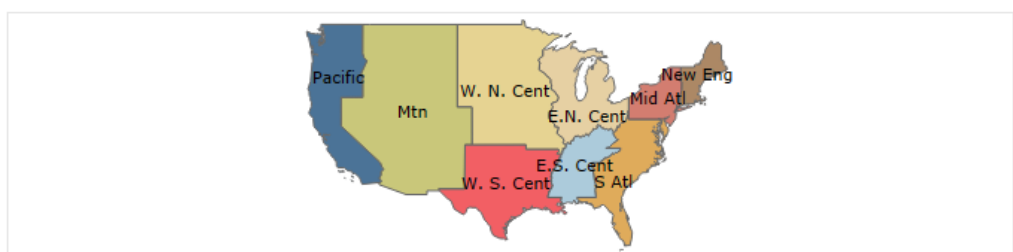


# 2024 Q1: Total US

## Shopper Preferences Change in Q1

A positive change from Q4 2023, the potato category across the US is up in volume sales at retail in Q1. The East South Central leads volume sales growth with a +10.3% increase. In the Middle Atlantic Division, category retail dollar sales are up +5.2%.

A bounce back in volume sales growth has proved another successful year with the Idaho Potato Commission's Potato Lovers contest.

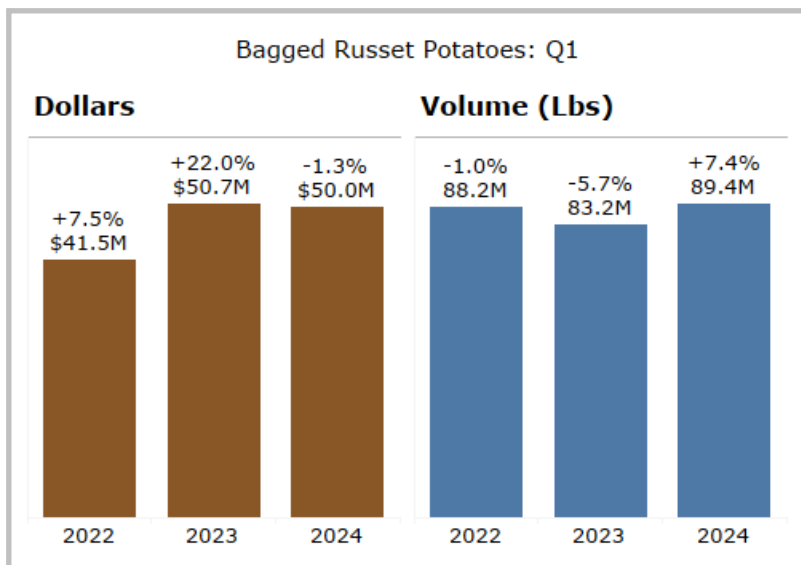


	Volume Share	Volume (Lbs)	Volume (Lbs) % Chg YoY	Dollar Share	Dollars	Dollars % Chg YoY
South Atlantic Division	21%	219M	+8.8%	24%	\$224M	+0.0%
East North Central Division	14%	150M	+5.2%	14%	\$131M	+2.0%
Pacific Division	11%	117M	+0.4%	12%	\$117M	-7.0%
Middle Atlantic Division	11%	111M	+9.4%	12%	\$110M	+5.2%
West South Central Division	13%	138M	+3.9%	12%	\$109M	-4.2%
Mountain Division	9%	91M	+2.8%	8%	\$72M	-5.0%
East South Central Division	8%	81M	+10.3%	7%	\$70M	-0.5%
West North Central Division	7%	75M	+7.1%	6%	\$60M	-4.6%
New England Division	5%	54M	+4.7%	6%	\$53M	+4.0%
Grand Total	100%	1,037M	+5.9%	100%	\$945M	-1.1%

## Bagged Potatoes Remain Strong

Bagged Russet potatoes continue to prove successful value to consumers in volume sales. Though dollars are down slightly in Q1 bagged russets, quality supply from Idaho this year, combined with promotion and secondary display opportunities, has proven that shoppers always find value in the potato category.

Idaho supply continues to look strong through the summer, providing great opportunity for retailers to promote Idaho and increase category sales.



# Idaho Potato Lovers 2024



## Secondary Display Sales Increase by 10x

The Idaho Potato Commission has successfully completed another year of the annual Potato Lovers Month (PLM) retail promotion. The promotion kicked off March 1 and went through April 15, encouraging retailers to create unique, eye-catching secondary displays of Idaho potatoes. This year, the commission is giving away up to \$150,000 worth of prizes. The commission offers free POS materials, marketing images, and a participation gift for all entries.

Of the promotion, Ross Johnson, VP of Retail and International at IPC, said “Our goal is to unleash produce managers’ creativity, just as potatoes allow consumers to get creative in their kitchens. The Idaho Potato Lovers contest has become something that produce managers all over the country love - it’s an opportunity for them to do something different from what they do every day as they run their departments

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



# 2024 Q1: East North Central Division



## Division Dollars Grow, Led by Russets and Yellows

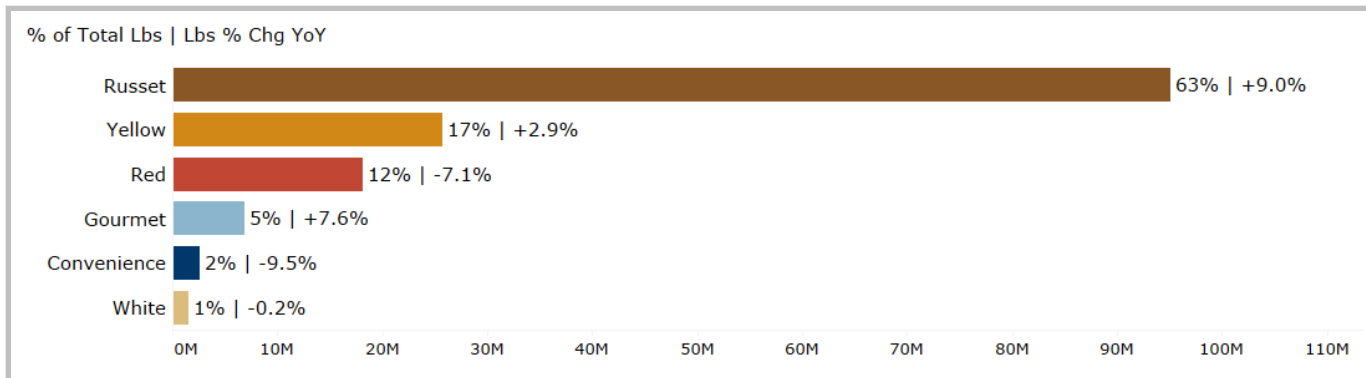
In Q1 2024, total Russet dollars in the E.N. Central division were up +1.5% and volume was up +9.0%. Yellow and Gourmet varieties grew in dollar and volume change over Q1 last year, even with price increases.

5lb bags were the top selling pack size in the E.N. Central division overall, carrying 43% of total potato volume. Of the 5lb pack sizes, Russet 5lb is the top selling item in the division, and grew by +4.7% in dollars this quarter.

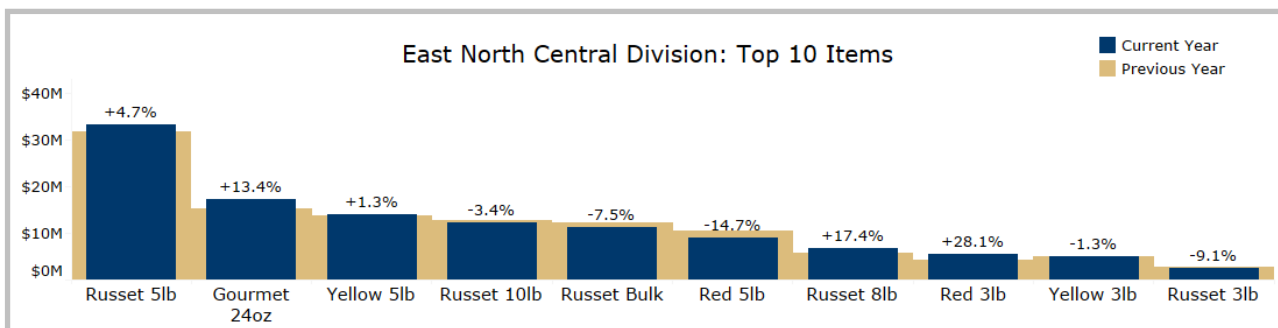
### Q1 Performance: All Varieties

	Dollars	Dollars % Chg YoY	Volume (Lbs)	Volume (Lbs) % Chg YoY	Avg Price/Lb	Avg Price/Lb Chg YoY
<b>Grand Total</b>	<b>\$131.2M</b>	<b>+2.0%</b>	<b>150.1M</b>	<b>+5.2%</b>	<b>\$0.87</b>	<b>-\$0.03</b>
Russet	\$65.6M	+1.5%	95.1M	+9.0%	\$0.69	-\$0.05
Yellow	\$24.7M	+6.6%	25.7M	+2.9%	\$0.96	+\$0.03
Gourmet	\$17.3M	+12.8%	6.9M	+7.6%	\$2.51	+\$0.12
Red	\$16.9M	-7.8%	18.1M	-7.1%	\$0.93	-\$0.01
Convenience	\$5.1M	-4.6%	2.7M	-9.5%	\$1.90	+\$0.10
White	\$1.7M	-12.9%	1.6M	-0.2%	\$1.08	-\$0.16

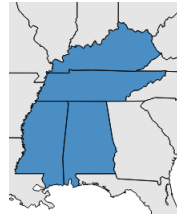
### All Varieties by Volume



### Top 10 Items: All Varieties



# 2024 Q1: East South Central Division



## Russet Volume Reacts Positive to Price Drop

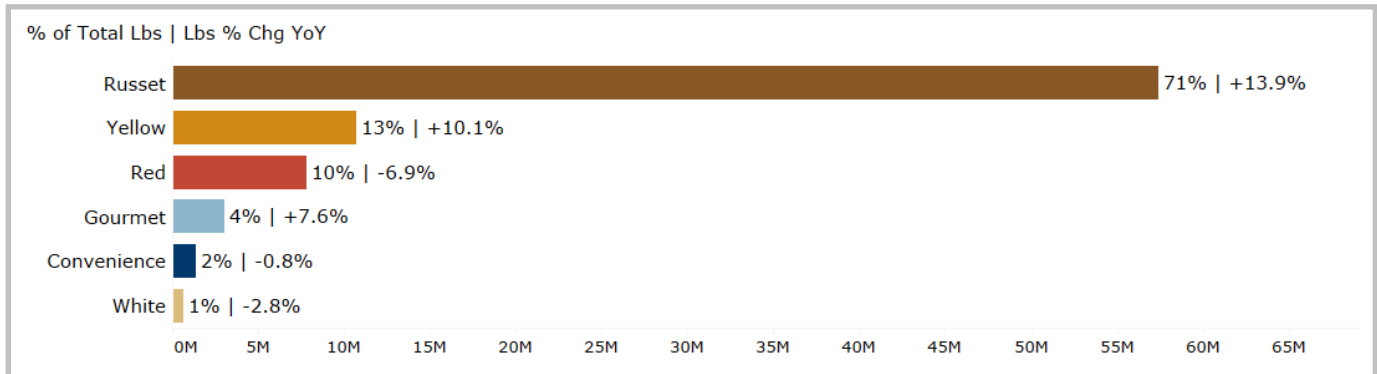
In Q1 2024, total Russet dollars and volume in the E.S. Central division were down -2.1%, and up +13.9%, respectively. Gourmets (24oz) led the category in Q1 growth in the division for dollar and volume sales. Yellow potatoes also continue to grow in the division, up 10.1% in volume this quarter.

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 increased +0.5% in dollar change over Q1 last year.

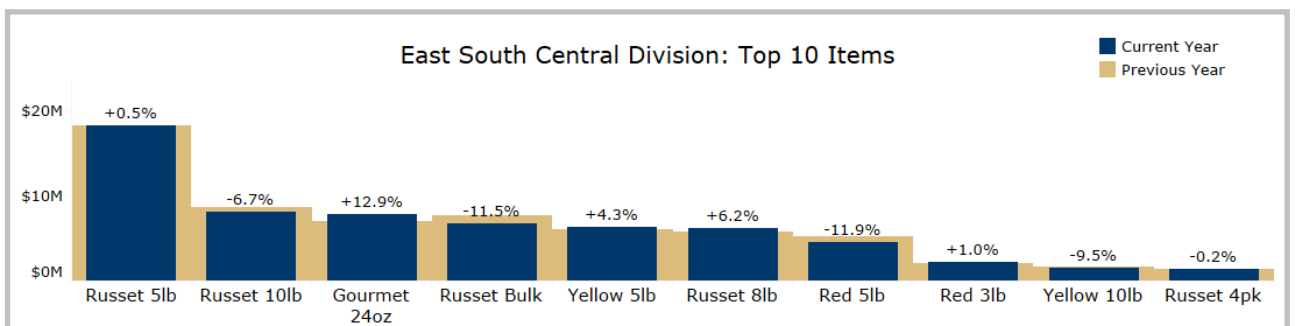
### Q1 Performance: All Varieties

	Dollars	Dollars % Chg YoY	Volume (Lbs)	Volume (Lbs) % Chg YoY	Avg Price/Lb	Avg Price/Lb Chg YoY
<b>Grand Total</b>	<b>\$70.5M</b>	<b>-0.5%</b>	<b>81.0M</b>	<b>+10.3%</b>	<b>\$0.87</b>	<b>-\$0.10</b>
Russet	\$41.3M	-2.1%	57.4M	+13.9%	\$0.72	-\$0.12
Yellow	\$10.1M	+7.8%	10.7M	+10.1%	\$0.95	-\$0.02
Gourmet	\$7.8M	+12.8%	3.0M	+7.6%	\$2.60	+\$0.12
Red	\$7.6M	-10.7%	7.8M	-6.9%	\$0.97	-\$0.04
Convenience	\$2.9M	-0.3%	1.3M	-0.8%	\$2.16	+\$0.01
White	\$0.7M	-24.3%	0.6M	-2.8%	\$1.13	-\$0.32

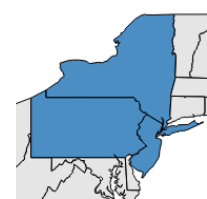
### All Varieties by Volume



### Top 10 Items: All Varieties



# 2024 Q1: Middle Atlantic Division



## Russet Bulk Jumps in Sales

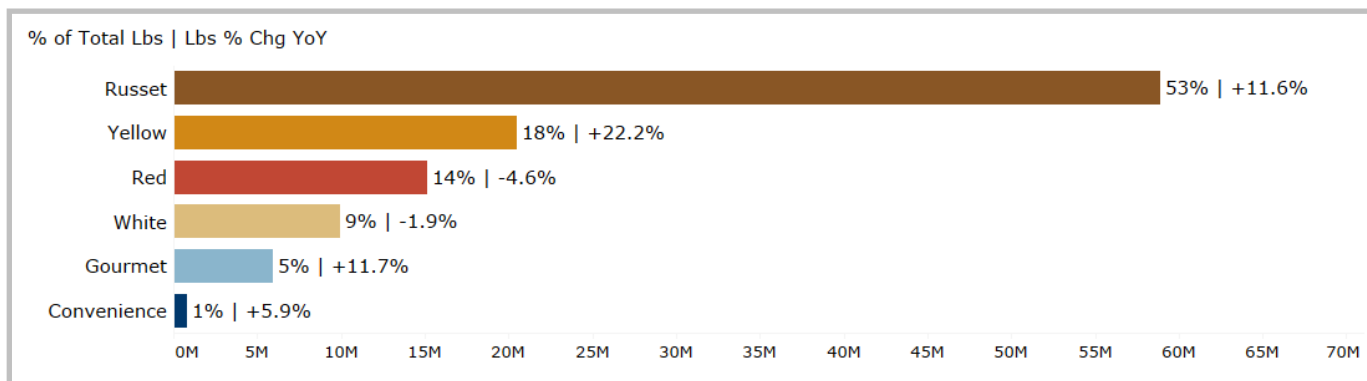
In Q1 2024, total Russet dollars in the Mid Atlantic division were up +7.4%, while volume grew significantly at +11.6%. 4 of 6 varieties were up in dollars and volume this quarter, a noticeable bounce back from Q4 of last year .

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. Russet bulk is the second most selling item by dollars, but had the greatest Q1 growth at +17.9%.

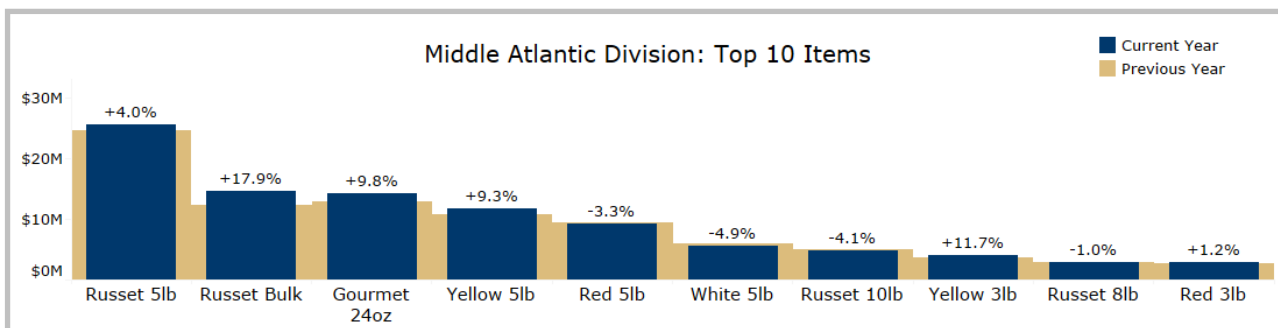
### Q1 Performance: All Varieties

	Dollars	Dollars % Chg YoY	Volume (Lbs)	Volume (Lbs) % Chg YoY	Avg Price/Lb	Avg Price/Lb Chg YoY
<b>Grand Total</b>	<b>\$109.6M</b>	<b>+5.2%</b>	<b>111.4M</b>	<b>+9.4%</b>	<b>\$0.98</b>	<b>-\$0.04</b>
Russet	\$48.6M	+7.4%	58.9M	+11.6%	\$0.82	-\$0.03
Yellow	\$20.9M	+12.8%	20.5M	+22.2%	\$1.02	-\$0.08
Red	\$16.1M	-7.0%	15.2M	-4.6%	\$1.06	-\$0.03
Gourmet	\$14.2M	+9.8%	5.9M	+11.7%	\$2.40	-\$0.04
White	\$7.5M	-4.4%	10.0M	-1.9%	\$0.75	-\$0.02
Convenience	\$2.3M	+0.5%	0.8M	+5.9%	\$2.77	-\$0.15

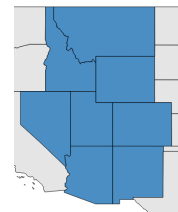
### All Varieties by Volume



### Top 10 Items: All Varieties



# 2024 Q1: Mountain Division



## Price Falls, Volume Up in Q1

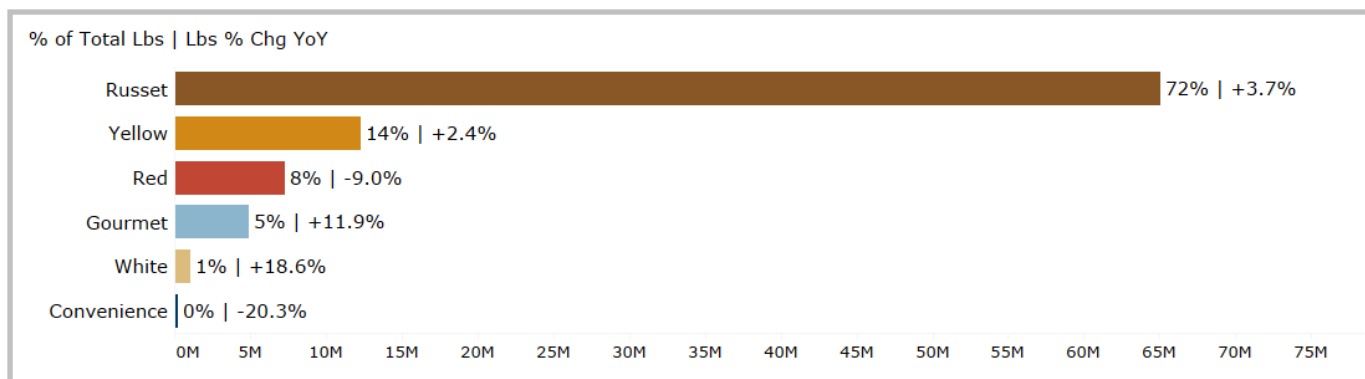
In Q1 2024, total Russet dollars in the Mountain division were down -7.5%, while volume was up +3.7%. Yellow, Gourmet, and Yellow, and White potato varieties all grew in Q1 volume sales in the Mountain Division.

5lb bags in the category are the top selling pack size in the Mountain division overall, carrying 38% of total potato volume. 5lb Russets were the top performing item in this division, up +0.8% in dollars in Q1.

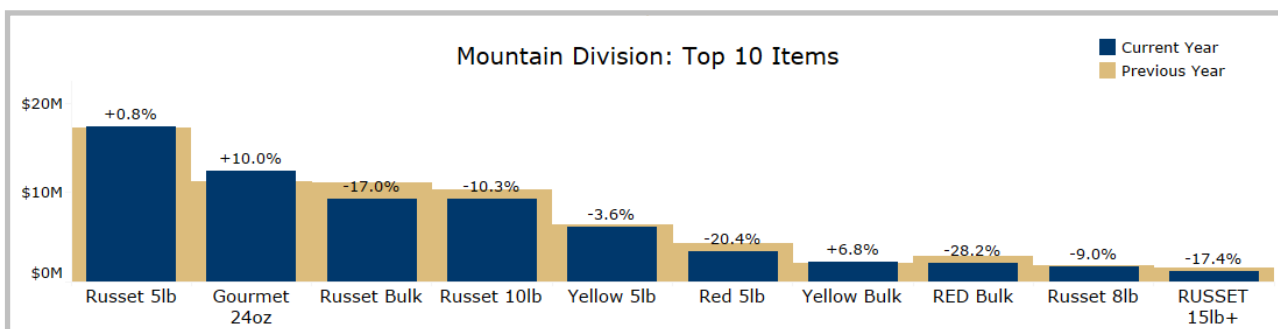
### Q1 Performance: All Varieties

	Dollars	Dollars % Chg YoY	Volume (Lbs)	Volume (Lbs) % Chg YoY	Avg Price/Lb	Avg Price/Lb Chg YoY
<b>Grand Total</b>	<b>\$71.8M</b>	<b>-5.0%</b>	<b>90.8M</b>	<b>+2.8%</b>	<b>\$0.79</b>	<b>-\$0.06</b>
Russet	\$39.5M	-7.5%	65.1M	+3.7%	\$0.61	-\$0.07
Gourmet	\$12.4M	+10.1%	4.9M	+11.9%	\$2.55	-\$0.04
Yellow	\$11.3M	-1.0%	12.3M	+2.4%	\$0.91	-\$0.03
Red	\$6.9M	-17.4%	7.3M	-9.0%	\$0.95	-\$0.10
White	\$1.2M	+2.2%	1.0M	+18.6%	\$1.15	-\$0.19
Convenience	\$0.5M	-27.2%	0.2M	-20.3%	\$1.99	-\$0.19

### All Varieties by Volume



### Top 10 Items: All Varieties





# 2024 Q1: New England Division



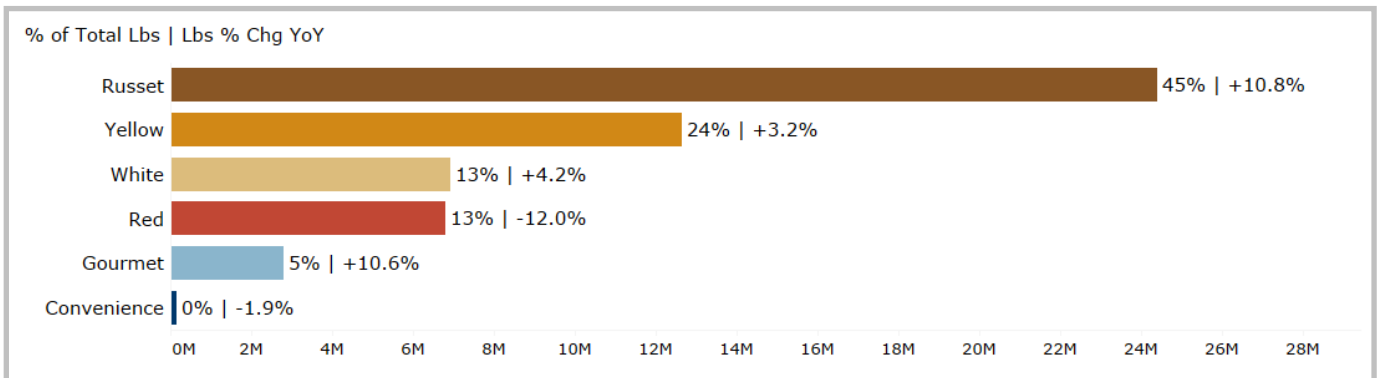
## Russet 5lb Jumps in Dollars and Volume

In Q1 2024, total Russet dollars in the New England division were up +4.8%, while volume grew +10.8%. With the exception of Reds and Convenience, all other varieties outperformed prior year sales this quarter. 5lb bags and Bulk were the top selling pack sizes in the New England division overall, carrying 42% and 26% of total potato volume, respectively. In Russets, the 5lb bags were the best selling pack size, with a +9.4% dollar increase and +15.0% volume growth in Q1 compared to last year.

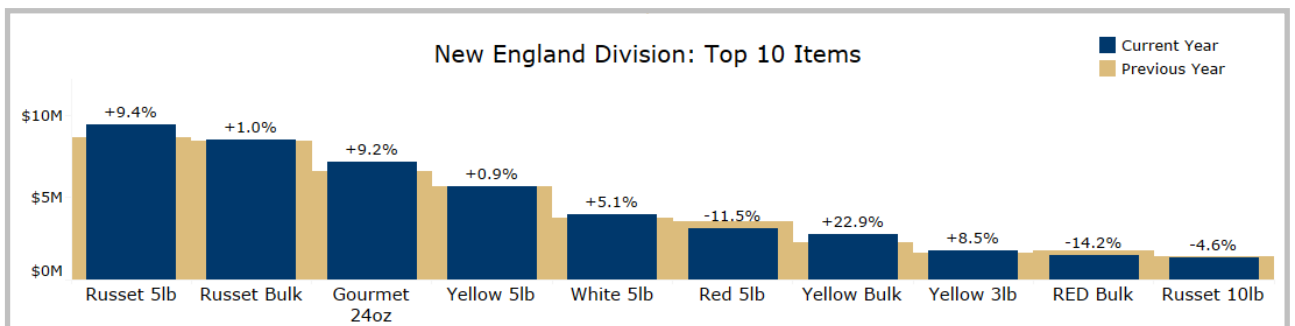
### Q1 Performance: All Varieties

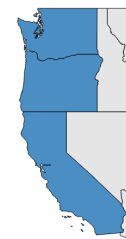
	Dollars	Dollars % Chg YoY	Volume (Lbs)	Volume (Lbs) % Chg YoY	Avg Price/Lb	Avg Price/Lb Chg YoY
<b>Grand Total</b>	<b>\$52.5M</b>	<b>+4.0%</b>	<b>53.7M</b>	<b>+4.7%</b>	<b>\$0.98</b>	<b>-\$0.01</b>
Russet	\$20.9M	+4.8%	24.4M	+10.8%	\$0.85	-\$0.05
Yellow	\$12.6M	+8.3%	12.7M	+3.2%	\$1.00	+\$0.05
Gourmet	\$7.2M	+9.2%	2.8M	+10.6%	\$2.56	-\$0.03
Red	\$6.8M	-10.0%	6.8M	-12.0%	\$0.99	+\$0.02
White	\$4.7M	+5.4%	6.9M	+4.2%	\$0.68	+\$0.01
Convenience	\$0.4M	-4.6%	0.2M	-1.9%	\$2.64	-\$0.08

### All Varieties by Volume



### Top 10 Items: All Varieties





# 2024 Q1: Pacific Division

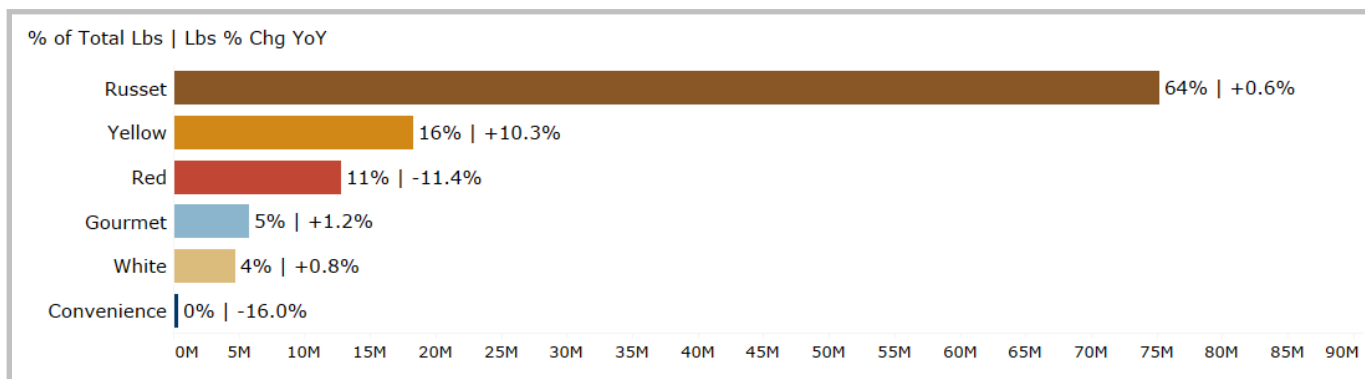
## Yellows Potatoes Continue to Lead in Growth

In Q1 2024, total Russet dollars in the Pacific division were down -9.6%, while volume was up +0.6%. Yellow potato volume had the greatest sales increase among varieties in the division, up +10.3% in volume. Bulk potatoes are the preferred way consumers shopped the category in the Pacific division, carrying 40% of total potato volume. The top growing item by dollars in Q1 is Yellow 5lb potatoes, which are up +2.7%.

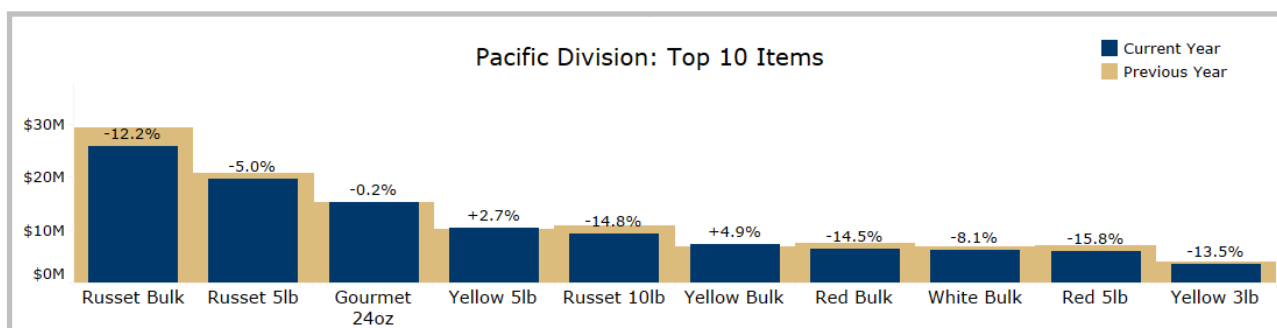
### Q1 Performance: All Varieties

	Dollars	Dollars % Chg YoY	Volume (Lbs)	Volume (Lbs) % Chg YoY	Avg Price/Lb	Avg Price/Lb Chg YoY
<b>Grand Total</b>	<b>\$116.6M</b>	<b>-7.0%</b>	<b>117.3M</b>	<b>+0.4%</b>	<b>\$0.99</b>	<b>-\$0.08</b>
Russet	\$57.9M	-9.6%	75.2M	+0.6%	\$0.77	-\$0.09
Yellow	\$21.8M	+2.7%	18.3M	+10.3%	\$1.19	-\$0.09
Gourmet	\$15.2M	-0.2%	5.8M	+1.2%	\$2.62	-\$0.04
Red	\$14.5M	-14.1%	12.8M	-11.4%	\$1.13	-\$0.03
White	\$6.4M	-8.7%	4.8M	+0.8%	\$1.34	-\$0.14
Convenience	\$0.8M	-16.5%	0.4M	-16.0%	\$2.11	-\$0.01

### All Varieties by Volume



### Top 10 Items: All Varieties



# 2024 Q1: South Atlantic Division



## Russets and Yellows have Double-Digit Volume Growth

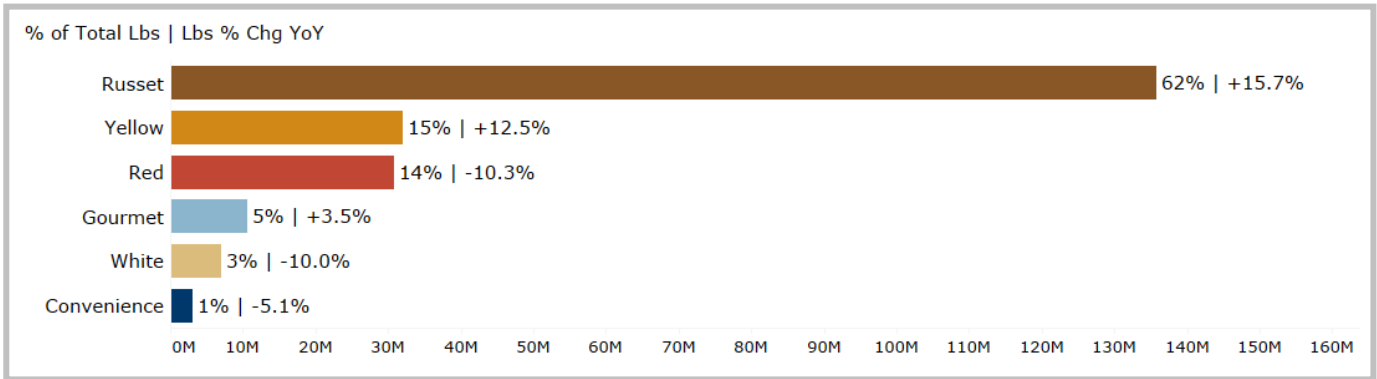
In Q1 2024, total Russet dollars and volume in the South Atlantic division were up +0.6% and +15.7%, respectively. With the exception of Red and White potatoes, dollars grew in all varieties.

5lb bags were the top selling pack size in the South Atlantic division overall, carrying 42% of total potato volume. Russet 5lb is the top selling item in the division, despite falling -1.2% in dollar sales. Bulk Russets, the second most selling item in the division gained +2.1% in dollar sales over the same period last year.

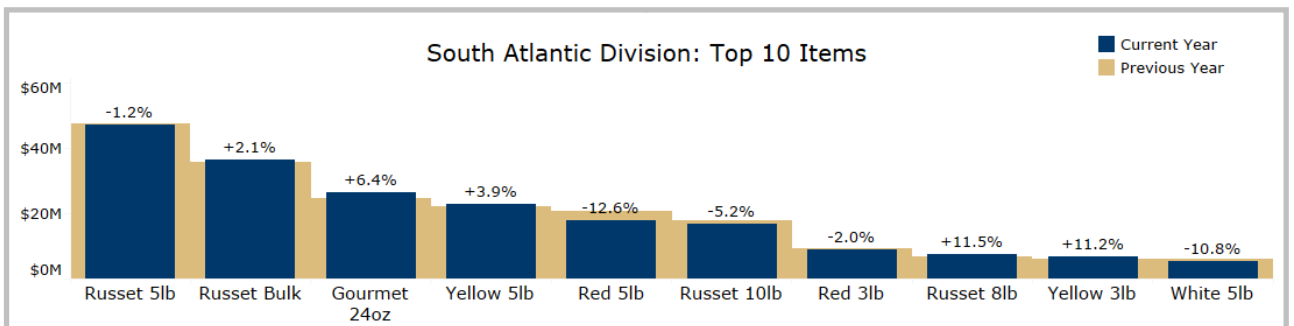
### Q1 Performance: All Varieties

	Dollars	Dollars % Chg YoY	Volume (Lbs)	Volume (Lbs) % Chg YoY	Avg Price/Lb	Avg Price/Lb Chg YoY
<b>Grand Total</b>	<b>\$224.0M</b>	<b>+0.0%</b>	<b>219.5M</b>	<b>+8.8%</b>	<b>\$1.02</b>	<b>-\$0.09</b>
Russet	\$111.6M	+0.6%	135.8M	+15.7%	\$0.82	-\$0.12
Yellow	\$35.8M	+7.5%	32.0M	+12.5%	\$1.12	-\$0.05
Red	\$33.1M	-11.1%	30.8M	-10.3%	\$1.07	-\$0.01
Gourmet	\$26.3M	+6.4%	10.7M	+3.5%	\$2.47	+\$0.07
Convenience	\$9.2M	+1.8%	3.2M	-5.1%	\$2.91	+\$0.20
White	\$7.9M	-8.7%	7.1M	-10.0%	\$1.12	+\$0.02

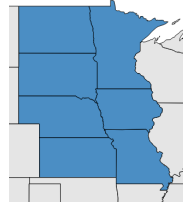
### All Varieties by Volume



### Top 10 Items: All Varieties



# 2024 Q1: West North Central Division



## Yellow Potatoes Lead Division Volume Growth

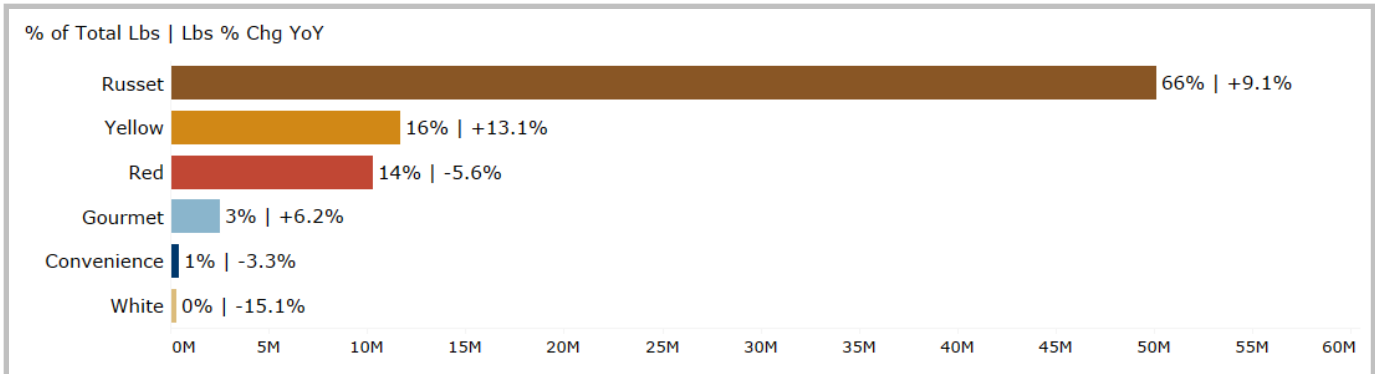
In Q1 2024, total Russet dollars in the W.N. Central division were down -6.3%, while volume was up +9.1%. Yellow and Gourmet varieties grew in dollars in Q1 over 2023.

Total 5lb bags were the top selling pack size in the W.N. Central division overall, carrying 49% of total potato volume. Yellow potatoes have 2 of the top 10 selling items in the division this quarter: 5lb is up +0.2% and Bulk is up +6.2% in dollars.

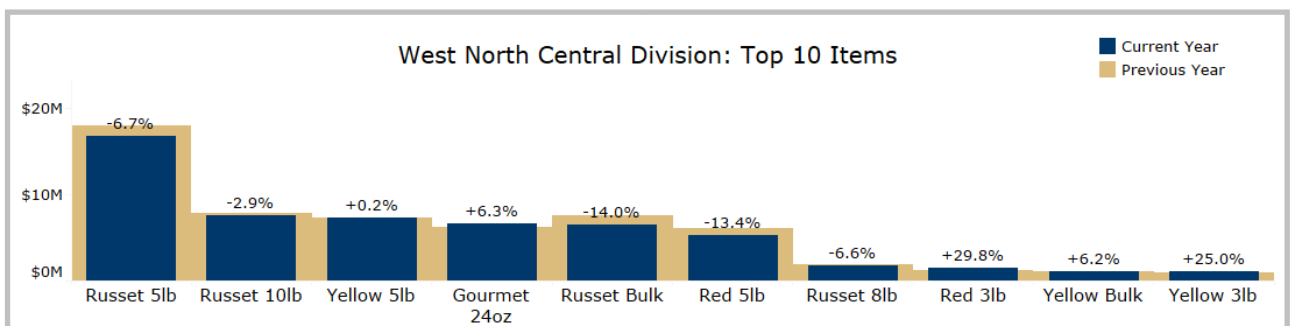
### Q1 Performance: All Varieties

	Dollars	Dollars % Chg YoY	Volume (Lbs)	Volume (Lbs) % Chg YoY	Avg Price/Lb	Avg Price/Lb Chg YoY
<b>Grand Total</b>	<b>\$60.1M</b>	<b>-4.6%</b>	<b>75.4M</b>	<b>+7.1%</b>	<b>\$0.80</b>	<b>-\$0.10</b>
Russet	\$33.2M	-6.3%	50.1M	+9.1%	\$0.66	-\$0.11
Yellow	\$10.7M	+4.8%	11.7M	+13.1%	\$0.91	-\$0.07
Red	\$8.5M	-10.3%	10.3M	-5.6%	\$0.82	-\$0.04
Gourmet	\$6.6M	+1.4%	2.5M	+6.2%	\$2.62	-\$0.13
Convenience	\$0.8M	-11.8%	0.4M	-3.3%	\$1.91	-\$0.18
White	\$0.4M	-24.9%	0.3M	-15.1%	\$1.12	-\$0.15

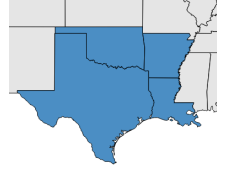
### All Varieties by Volume



### Top 10 Items: All Varieties



# 2024 Q1: West South Central Division



## Yellow Potatoes Lead in Growth

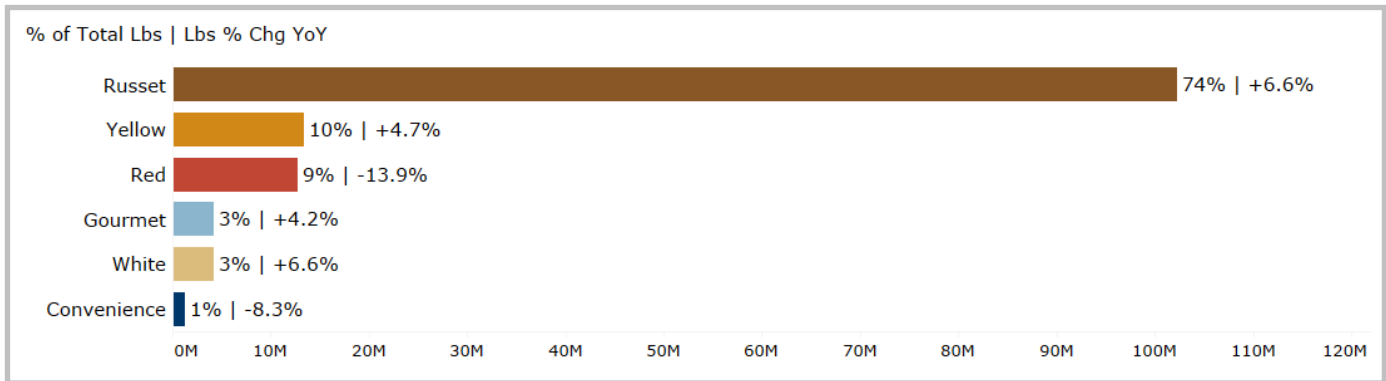
In Q1 2024, total Russet dollars in the W.S. Central division were down -4.7%, while volume was up +6.6%. All varieties except Red and Convenience grew in volume sales this quarter.

5lb bags in the total category were the top selling pack size in the W.S. Central division overall, carrying 36% of total potato volume. Of the 5lb pack sizes, Russet 5lb bags were the top selling item in the division, despite a dollar decrease of -3.1% compared to last year.

### Q1 Performance: All Varieties

	Dollars	Dollars % Chg YoY	Volume (Lbs)	Volume (Lbs) % Chg YoY	Avg Price/Lb	Avg Price/Lb Chg YoY
<b>Grand Total</b>	<b>\$109.1M</b>	<b>-4.2%</b>	<b>138.0M</b>	<b>+3.9%</b>	<b>\$0.79</b>	<b>-\$0.07</b>
Russet	\$63.4M	-4.7%	102.3M	+6.6%	\$0.62	-\$0.07
Yellow	\$13.4M	+5.5%	13.4M	+4.7%	\$1.00	+\$0.01
Red	\$12.6M	-15.0%	12.7M	-13.9%	\$0.99	-\$0.01
Gourmet	\$11.2M	-2.5%	4.3M	+4.2%	\$2.62	-\$0.18
White	\$5.9M	-1.2%	4.1M	+6.6%	\$1.42	-\$0.11
Convenience	\$2.6M	+8.0%	1.2M	-8.3%	\$2.13	+\$0.32

### All Varieties by Volume



### Top 10 Items: All Varieties

