



2022 Q3

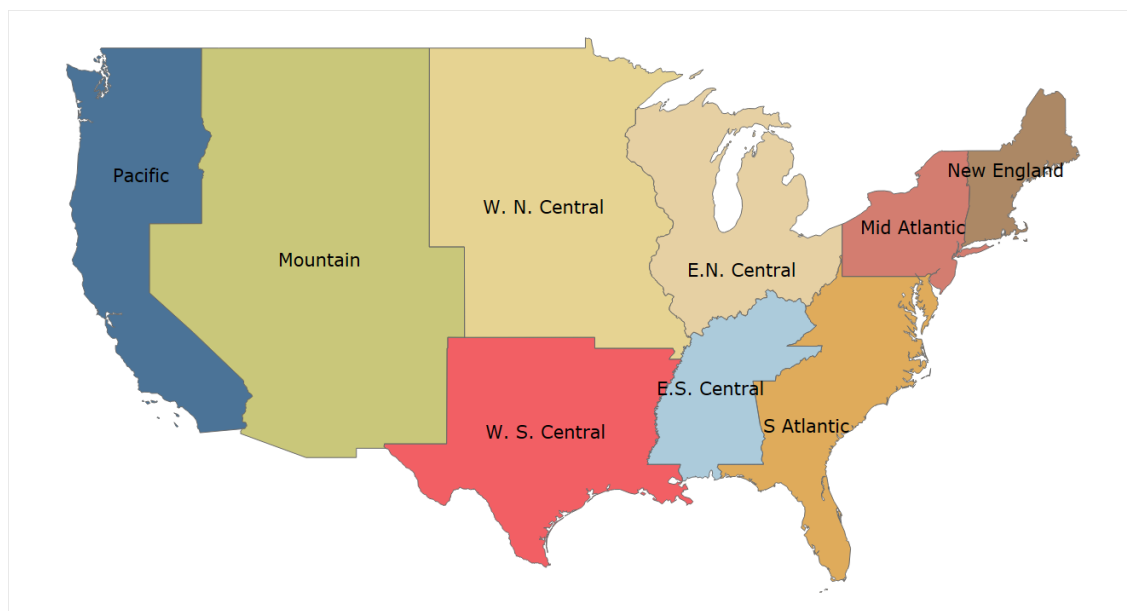
Potato Category Review

Idaho Potato Commission

2022 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 3 - Oct 1, 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, July-September, 2022



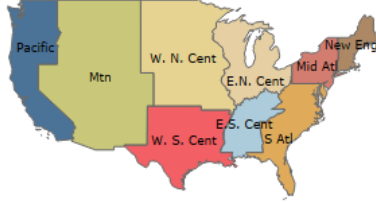
2022 Q3: Total US

Dollars Trend Up, Volume Not Far Behind

All nine divisions gained in dollars this quarter. The West South Central Division experienced the greatest year-over-year dollar growth at over 31%. Though volume was down, harvest for new crop began in week 7 of Q3, and potatoes have bounced back quickly.

Consistent with previous quarters this year, potatoes stand out as a value item during periods of inflation, even when their prices are higher. Potatoes should be highlighted with secondary displays in the produce department as a top value item.

Heading into the holiday season, retailers can consider new holiday promotion strategies by reaching out to their retail promotion director.

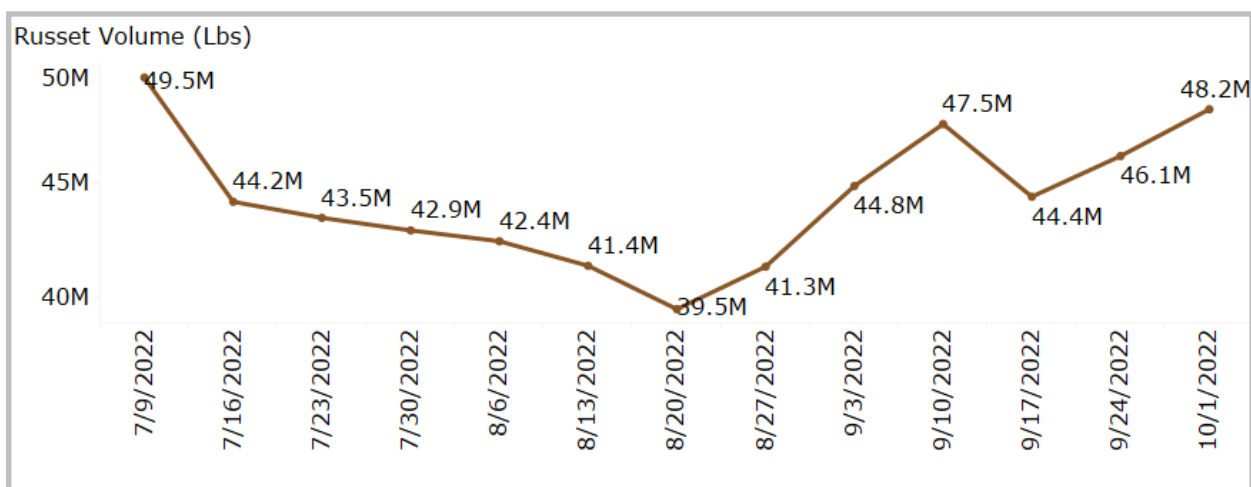


	Vol. Share	Volume (Lbs)	Vol. % Chg YoY	Dollar Share	Dollars	\$ % Chg YoY
South Atlantic Division	22%	190M	-1.7%	24%	\$213M	+26.0%
East North Central Division	14%	125M	-2.5%	14%	\$125M	+25.1%
West South Central Division	14%	127M	+0.8%	13%	\$113M	+31.7%
Pacific Division	12%	104M	+0.2%	12%	\$109M	+26.7%
Middle Atlantic Division	9%	83M	-4.5%	10%	\$90M	+11.8%
East South Central Division	8%	66M	-6.7%	8%	\$69M	+25.7%
Mountain Division	9%	80M	+2.1%	8%	\$69M	+29.2%
West North Central Division	7%	64M	+1.4%	7%	\$61M	+28.1%
New England Division	5%	42M	-1.7%	5%	\$47M	+12.3%
Grand Total	100%	881M	-1.4%	100%	\$896M	+24.6%

Russets Bounce Back With New Crop

The weeks leading up to potato harvest brought low volume and even shortages at retail. However, russet volume had no problem bouncing back with new crop. Volume sales quickly recovered to lead-

ing up to Labor Day, and continue to rise heading into Q4.



Yellow Potatoes: Annual Pricing Analysis

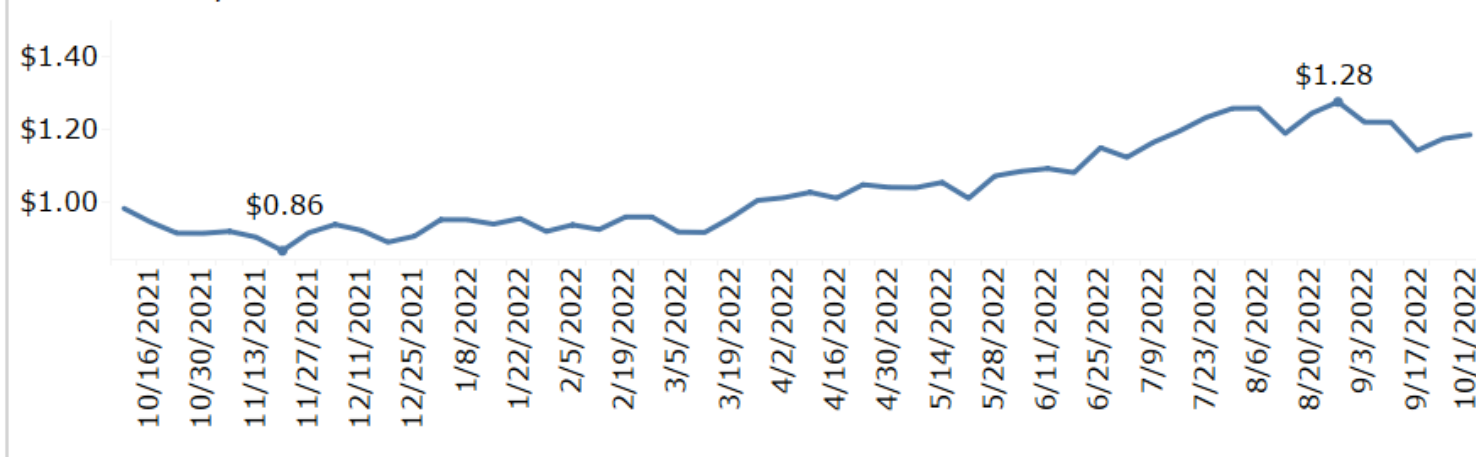
Yellow Volume & Prices Up

Inflation on yellow potatoes has been on the rise since November 2021. 2022 Q3 is the highest pricing to date in the past year, up \$0.41/lb from November. Though inflation is the main contributor to rising prices, shortages in volume supply at retail in the weeks leading up to the mid-August start of new

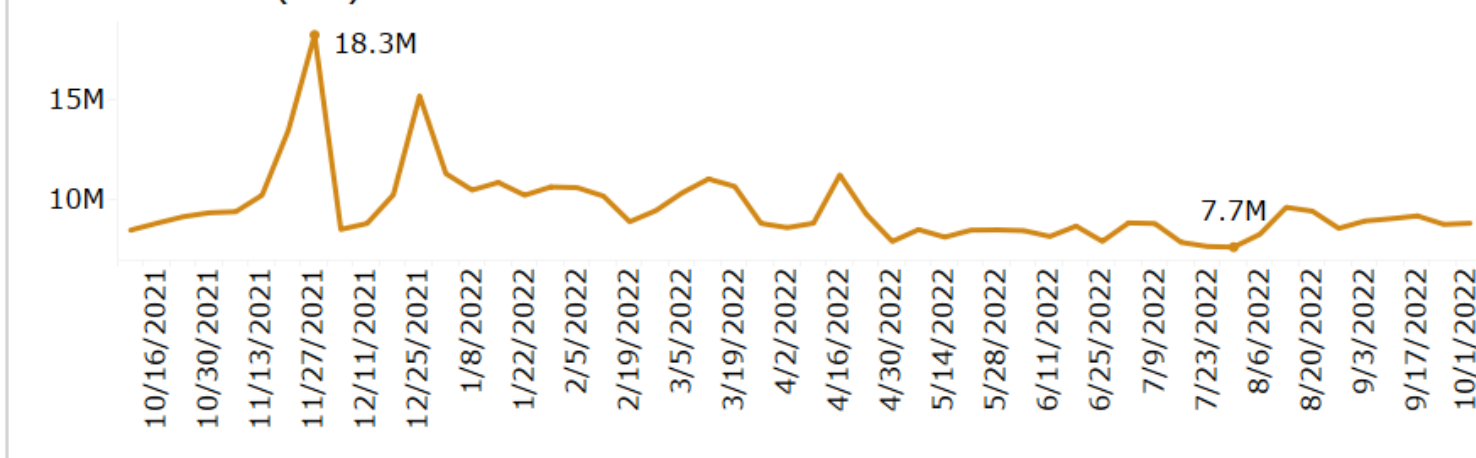
crop are also a cause of increases. Most impressive of all, despite increasing price/lb, volume remained steady.

Yellow volume hit its Q3 peak in the week of 8/13/2022 despite being the second highest average price/lb week in the past year.

Yellow Price/Lb



Yellow Volume (Lbs)



2022 Q3: East North Central Division

Yellow Volume Sales Up Over 10%

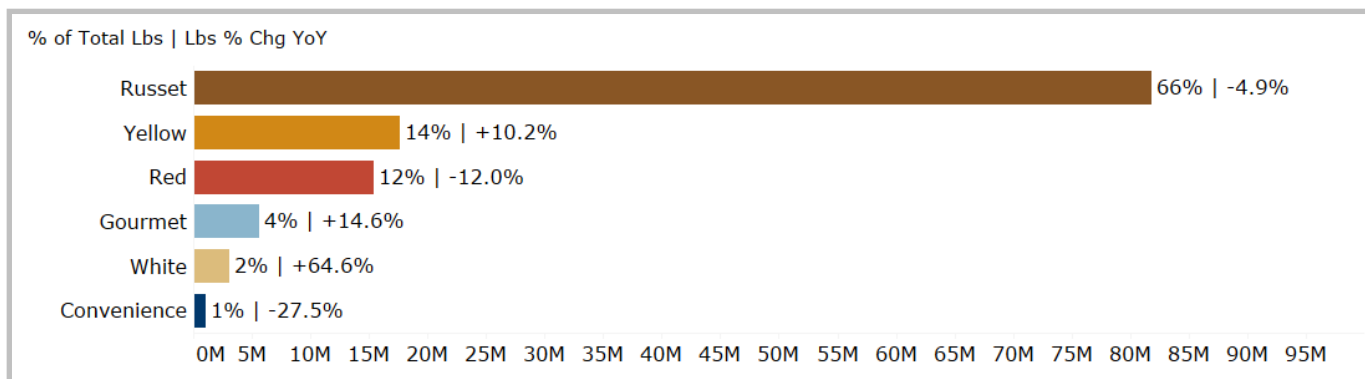
In Q3 2022, total russet dollars in the E.N. Central division were up +26.0%, while volume was down -4.9%. All varieties except convenience are up in dollars, while only yellows, gourmet, and white are up in volume.

5lb bags 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 item is the top selling item in the division, posting a dollar increase of +35.9% compared to year ago.

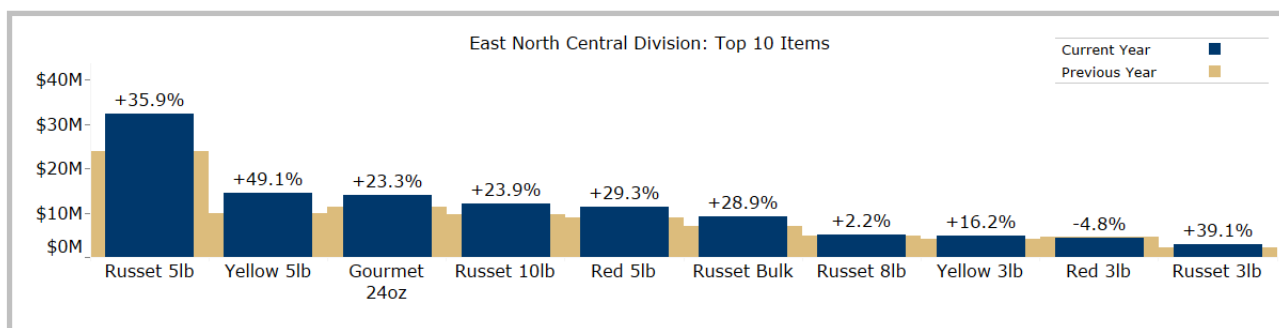
Q3 Performance: All Varieties

	Dollars	\$ Chg vs LY	\$ % Chg YoY	Volume (Lbs)	Vol. Chg vs LY	Vol. % Chg YoY	Avg Price/Lb	Price Per Lb Chg
Grand Total	\$125.29M	+\$25.15M	+25.1%	124.59M	-3.18M	-2.5%	\$1.01	+\$0.22
Russet	\$65.14M	+\$13.45M	+26.0%	81.88M	-4.24M	-4.9%	\$0.80	+\$0.20
Yellow	\$21.11M	+\$5.49M	+35.1%	17.60M	+1.63M	+10.2%	\$1.20	+\$0.22
Red	\$18.80M	+\$2.28M	+13.8%	15.43M	-2.11M	-12.0%	\$1.22	+\$0.28
Gourmet	\$14.02M	+\$2.65M	+23.3%	5.59M	+0.71M	+14.6%	\$2.51	+\$0.18
White	\$3.30M	+\$1.51M	+84.3%	3.08M	+1.21M	+64.6%	\$1.07	+\$0.11
Convenience	\$2.93M	-\$0.22M	-7.0%	1.01M	-0.38M	-27.5%	\$2.89	+\$0.64

All Varieties by Volume



Top 10 Items: All Varieties



2022 Q3: East South Central Division

5lb Russets Gain From Inflation

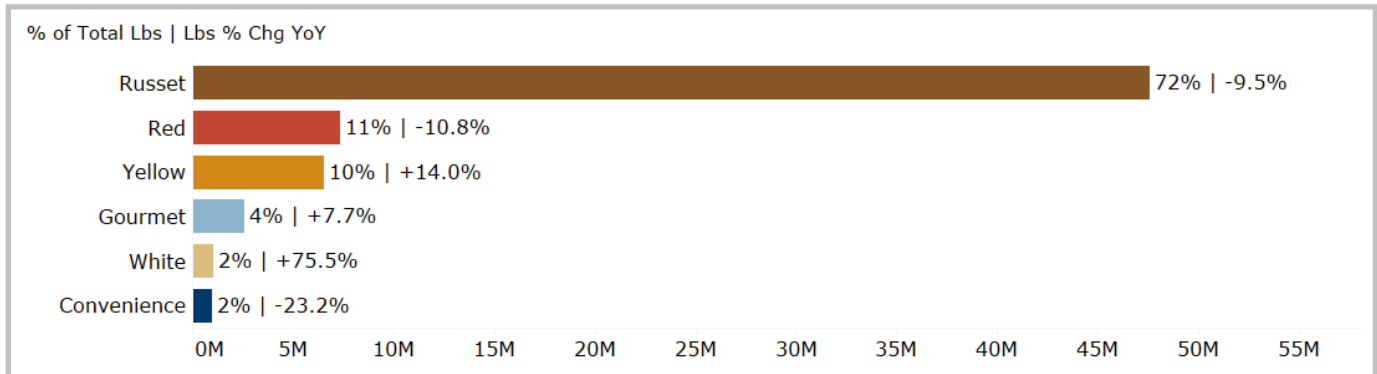
In Q3 2022, total russet dollars in the E.S. Central division were up +29.1%, but volume fell -9.5%. With the exception of yellow, white, and gourmet, every variety is down in volume sales vs 2021 Q3.

5lb bags are the top selling pack size in the E.S. Central division overall, carrying 44% of total potato volume. Russet 5lb item is the top selling item in the division, posting a dollar increase of +50.4% and a volume increase of +11.1% compared to year ago.

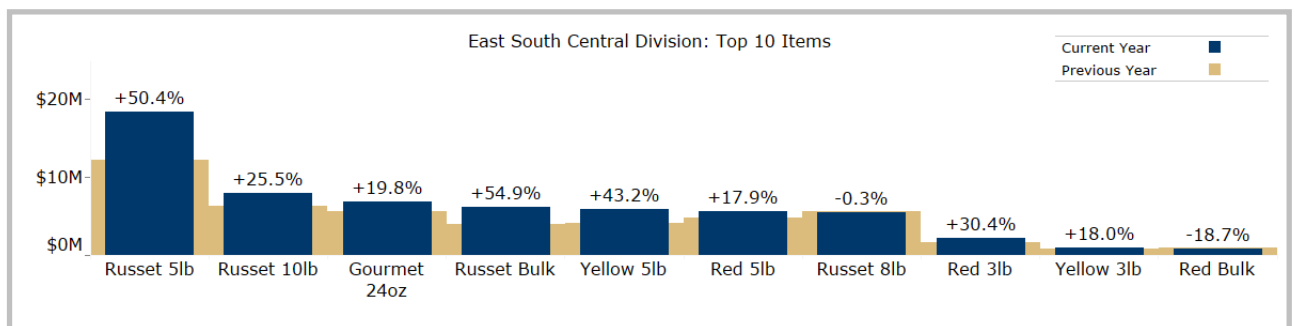
Q3 Performance: All Varieties

	Dollars	\$ Chg vs LY	\$ % Chg YoY	Volume (Lbs)	Vol. Chg vs LY	Vol. % Chg YoY	Avg Price/Lb	Price Per Lb Chg
Grand Total	\$69.25M	+\$14.15M	+25.7%	66.16M	-4.76M	-6.7%	\$1.05	+\$0.27
Russet	\$41.82M	+\$9.42M	+29.1%	47.61M	-5.01M	-9.5%	\$0.88	+\$0.26
Red	\$9.22M	+\$1.20M	+15.0%	7.33M	-0.88M	-10.8%	\$1.26	+\$0.28
Yellow	\$7.82M	+\$2.13M	+37.3%	6.52M	+0.80M	+14.0%	\$1.20	+\$0.20
Gourmet	\$6.81M	+\$1.13M	+19.8%	2.62M	+0.19M	+7.7%	\$2.59	+\$0.26
Convenience	\$2.55M	-\$0.10M	-3.7%	1.02M	-0.31M	-23.2%	\$2.50	+\$0.51
White	\$1.03M	+\$0.38M	+57.5%	1.05M	+0.45M	+75.5%	\$0.98	-\$0.11

All Varieties by Volume



Top 10 Items: All Varieties



2022 Q3: Middle Atlantic Division

Yellows Have Highest Q3 Growth

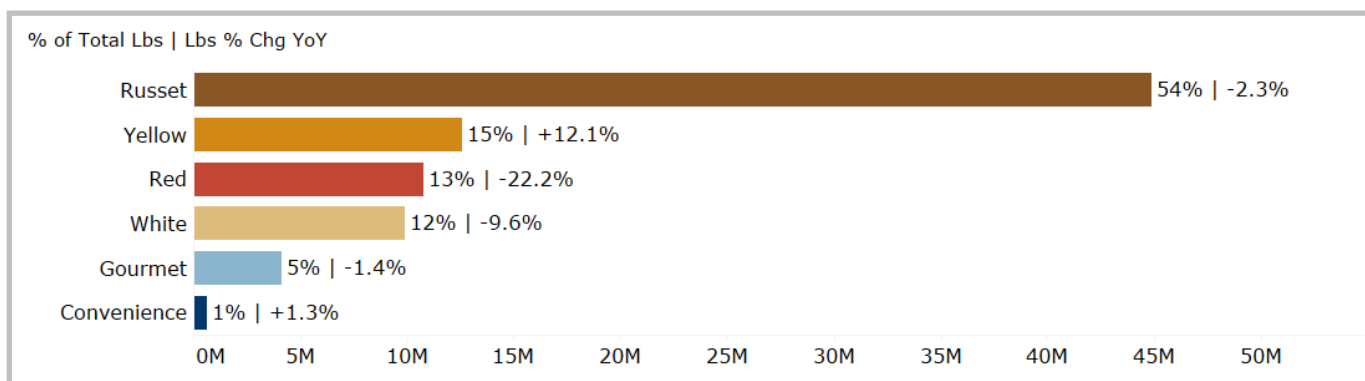
In Q3 2022, total russet dollars in the Mid Atlantic division were up +20.3%, while volume was down -2.3%. Yellows and convenience are the only varieties up in volume and dollars this quarter.

5lb bags are the top selling pack size in the Mid Atlantic division overall, carrying 49% of total potato volume. Of the 5lb pack sizes, russet 5lb item is the top selling item in the Mid Atlantic division, posting a dollar increase of over +29.7% compared to Q3 2021.

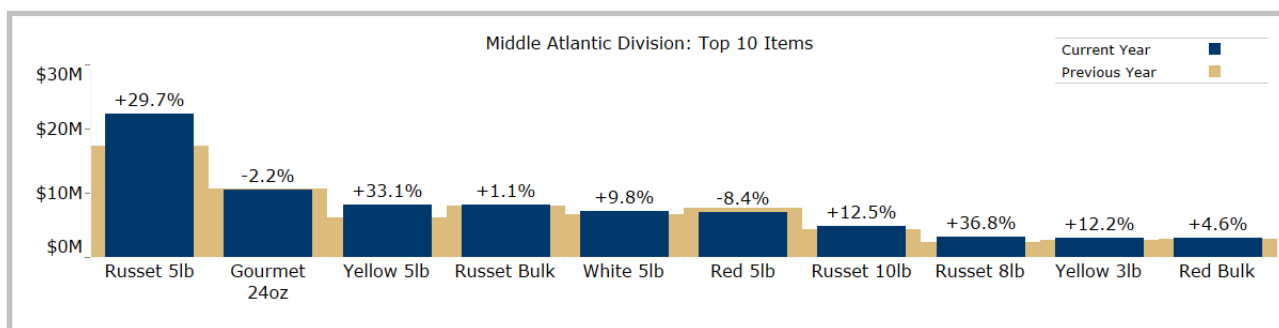
Q3 Performance: All Varieties

	Dollars	\$ Chg vs LY	\$ % Chg YoY	Volume (Lbs)	Vol. Chg vs LY	Vol. % Chg YoY	Avg Price/Lb	Price Per Lb Chg
Grand Total	\$90.43M	+\$9.55M	+11.8%	82.92M	-3.87M	-4.5%	\$1.09	+\$0.16
Russet	\$40.29M	+\$6.80M	+20.3%	44.90M	-1.05M	-2.3%	\$0.90	+\$0.17
Yellow	\$14.87M	+\$2.70M	+22.2%	12.57M	+1.36M	+12.1%	\$1.18	+\$0.10
Red	\$13.82M	-\$0.82M	-5.6%	10.77M	-3.07M	-22.2%	\$1.28	+\$0.23
Gourmet	\$10.43M	-\$0.23M	-2.2%	4.14M	-0.06M	-1.4%	\$2.52	-\$0.02
White	\$9.07M	+\$0.99M	+12.3%	9.88M	-1.05M	-9.6%	\$0.92	+\$0.18
Convenience	\$1.95M	+\$0.12M	+6.4%	0.66M	+0.01M	+1.3%	\$2.93	+\$0.14

All Varieties by Volume



Top 10 Items: All Varieties



2022 Q3: Mountain Division

Yellows Continue Gaining Share in Q3

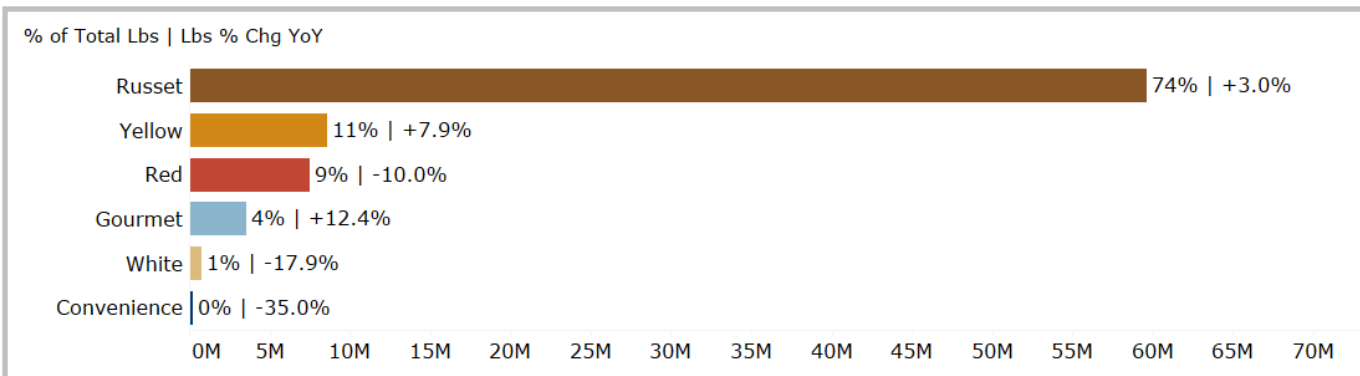
In Q3 2022, total russet dollars in the Mountain division were up +36.3%, while volume was up +3.0%. Russet volume growth exceeds Total US in this division (Total US russet volume at -1.8% for Q3).

5lb bags are the top selling pack size in the Mountain division overall, carrying 40% of total potato volume. Of the 5lb pack sizes, russet 5lb item is the top selling item in the Mountain division, posting a dollar increase of +38.9% compared to year ago.

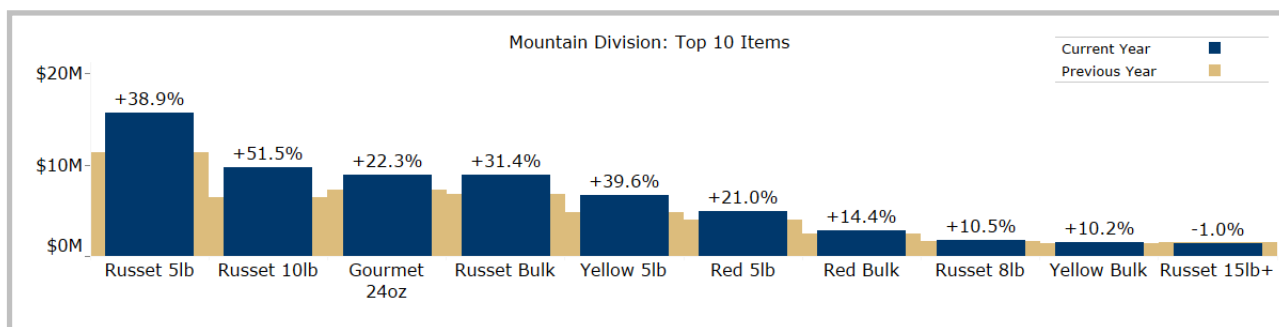
Q3 Performance: All Varieties

	Dollars	\$ Chg vs LY	\$ % Chg YoY	Volume (Lbs)	Vol. Chg vs LY	Vol. % Chg YoY	Avg Price/Lb	Price Per Lb Chg
Grand Total	\$68.52M	+\$15.49M	+29.2%	80.29M	+1.62M	+2.1%	\$0.85	+\$0.18
Russet	\$38.73M	+\$10.32M	+36.3%	59.66M	+1.72M	+3.0%	\$0.65	+\$0.16
Yellow	\$10.15M	+\$2.36M	+30.3%	8.58M	+0.63M	+7.9%	\$1.18	+\$0.20
Red	\$9.13M	+\$1.40M	+18.2%	7.52M	-0.84M	-10.0%	\$1.21	+\$0.29
Gourmet	\$8.91M	+\$1.63M	+22.3%	3.56M	+0.39M	+12.4%	\$2.51	+\$0.20
White	\$1.06M	-\$0.03M	-2.9%	0.77M	-0.17M	-17.9%	\$1.38	+\$0.21
Convenience	\$0.54M	-\$0.19M	-26.1%	0.21M	-0.11M	-35.0%	\$2.54	+\$0.30

All Varieties by Volume



Top 10 Items: All Varieties



2022 Q3: New England Division

Yellows Drive Greatest Volume Growth in Q3

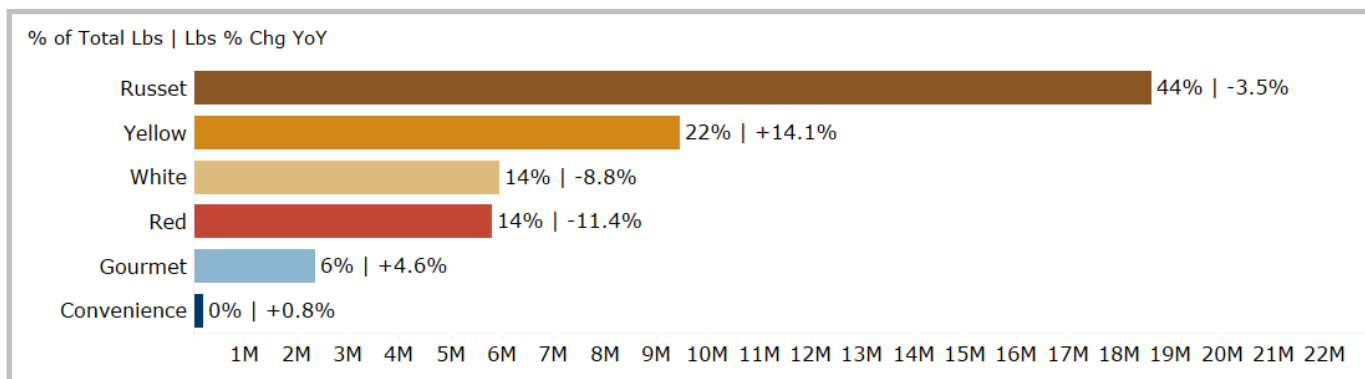
In Q3 2022, total russet dollars in the New England division were up +12.8%, while volume was down -3.5%. Yellows are up +14.1% in volume in this division, while reds are down -11.4% in volume.

5lb bags and bulk are the top selling pack sizes in the New England division overall, carrying 43% and 24% of total potato volume, respectively. In russets, the 5lb bag is the best selling pack size, posting Q3 gains of +13.6% in dollar sales.

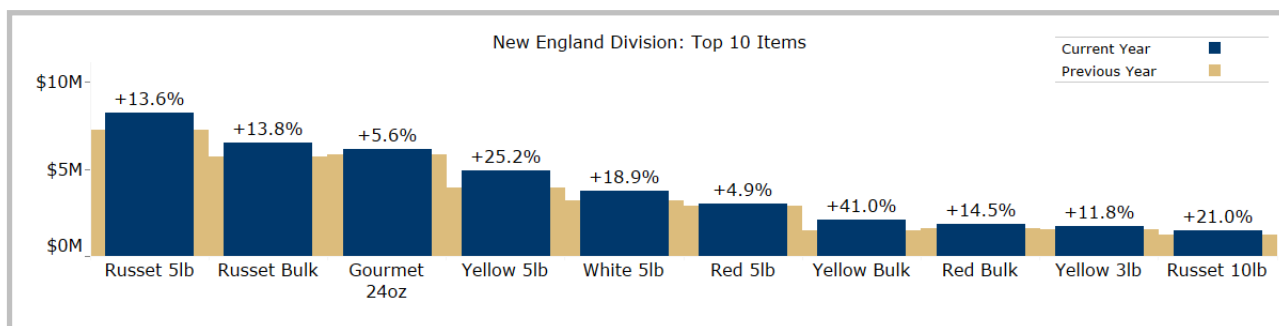
Q3 Performance: All Varieties

	Dollars	\$ Chg vs LY	\$ % Chg YoY	Volume (Lbs)	Vol. Chg vs LY	Vol. % Chg YoY	Avg Price/Lb	Price Per Lb Chg
Grand Total	\$46.58M	+\$5.10M	+12.3%	42.39M	-0.73M	-1.7%	\$1.10	+\$0.14
Russet	\$17.68M	+\$2.01M	+12.8%	18.64M	-0.68M	-3.5%	\$0.95	+\$0.14
Yellow	\$10.55M	+\$2.10M	+24.9%	9.45M	+1.17M	+14.1%	\$1.12	+\$0.10
Red	\$7.04M	+\$0.39M	+5.8%	5.80M	-0.74M	-11.4%	\$1.21	+\$0.20
Gourmet	\$6.15M	+\$0.32M	+5.6%	2.37M	+0.10M	+4.6%	\$2.59	+\$0.02
White	\$4.56M	+\$0.14M	+3.2%	5.94M	-0.57M	-8.8%	\$0.77	+\$0.09
Convenience	\$0.60M	+\$0.14M	+30.7%	0.19M	+0.00M	+0.8%	\$3.14	+\$0.72

All Varieties by Volume



Top 10 Items: All Varieties



2022 Q3: Pacific Division

Bulk Drives Division Pack Sizes

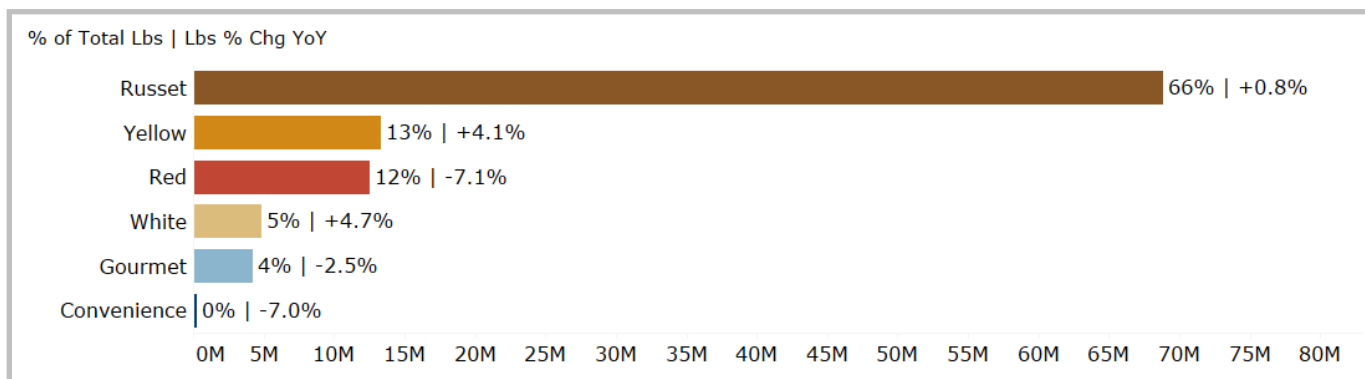
In Q3 2022, total russet dollars in the Pacific division were up +33.9%, while volume was up +0.8%. Reds saw the greatest volume declines at -7.1%.

Bulks are the top selling pack size in the Pacific division overall, carrying 39% 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 Q3 with bulk russets outperforming 5lb russets.

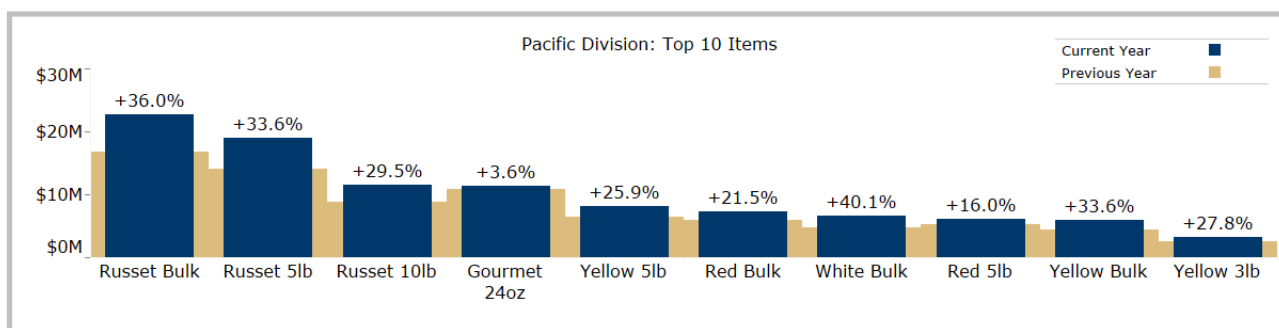
Q3 Performance: All Varieties

	Dollars	\$ Chg vs LY	\$ % Chg YoY	Volume (Lbs)	Vol. Chg vs LY	Vol. % Chg YoY	Avg Price/Lb	Price Per Lb Chg
Grand Total	\$108.87M	+\$22.95M	+26.7%	104.12M	+0.20M	+0.2%	\$1.05	+\$0.22
Russet	\$56.43M	+\$14.28M	+33.9%	68.85M	+0.54M	+0.8%	\$0.82	+\$0.20
Yellow	\$17.78M	+\$3.90M	+28.1%	13.36M	+0.52M	+4.1%	\$1.33	+\$0.25
Red	\$15.83M	+\$2.42M	+18.1%	12.50M	-0.96M	-7.1%	\$1.27	+\$0.27
Gourmet	\$11.29M	+\$0.40M	+3.6%	4.27M	-0.11M	-2.5%	\$2.64	+\$0.16
White	\$6.92M	+\$2.03M	+41.4%	4.88M	+0.22M	+4.7%	\$1.42	+\$0.37
Convenience	\$0.61M	-\$0.08M	-11.1%	0.26M	-0.02M	-7.0%	\$2.32	-\$0.11

All Varieties by Volume



Top 10 Items: All Varieties



2022 Q3: South Atlantic Division

Bulks Gain in Dollar Share

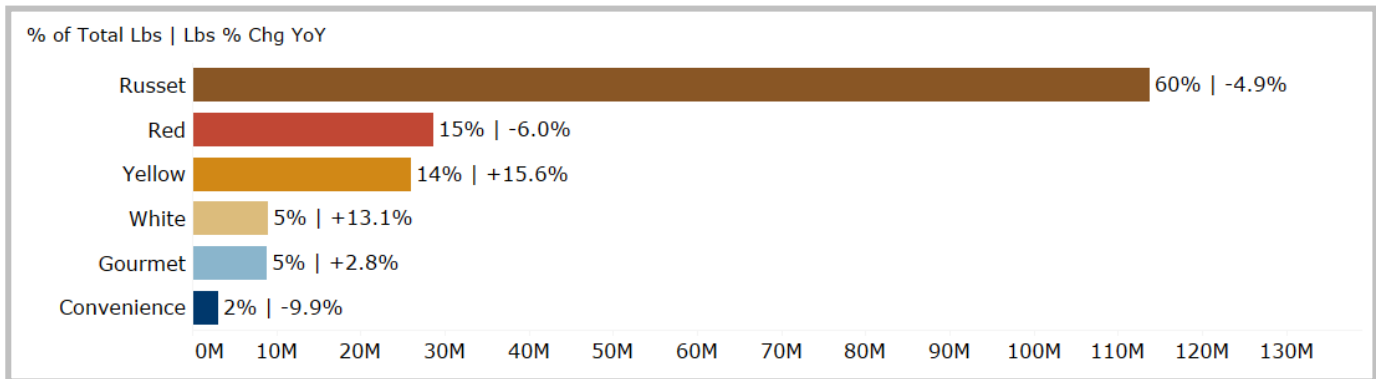
In Q3 2022, total russet dollars in the South Atlantic division were up +28.1%, while volume was down -4.9%. Yellows had the greatest Q3 volume growth in the South Atlantic compared to any other division in the US.

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 50% volume share in Q2.

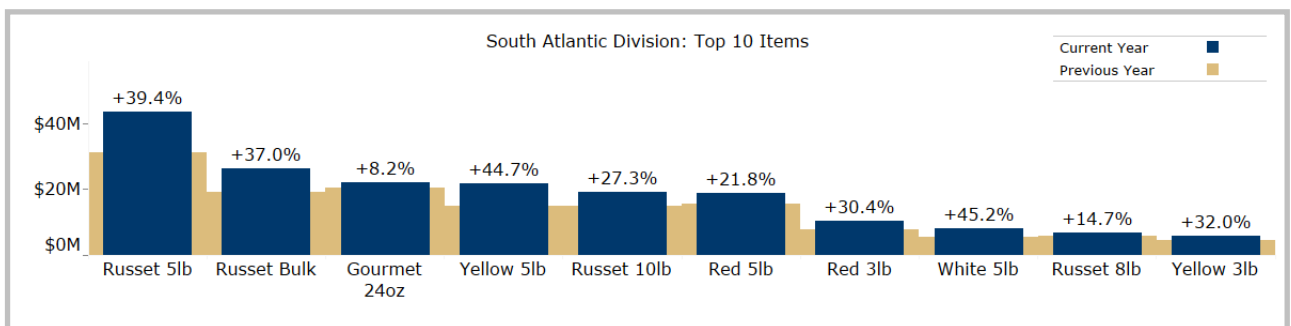
Q3 Performance: All Varieties

	Dollars	\$ Chg vs LY	\$ % Chg YoY	Volume (Lbs)	Vol. Chg vs LY	Vol. % Chg YoY	Avg Price/Lb	Price Per Lb Chg
Grand Total	\$213.35M	+\$43.96M	+26.0%	189.61M	-3.25M	-1.7%	\$1.13	+\$0.25
Russet	\$104.78M	+\$23.01M	+28.1%	113.87M	-5.85M	-4.9%	\$0.92	+\$0.24
Red	\$36.85M	+\$6.58M	+21.7%	28.71M	-1.84M	-6.0%	\$1.28	+\$0.29
Yellow	\$31.51M	+\$9.03M	+40.2%	25.94M	+3.50M	+15.6%	\$1.21	+\$0.21
Gourmet	\$22.04M	+\$1.68M	+8.2%	8.90M	+0.25M	+2.8%	\$2.48	+\$0.12
White	\$9.43M	+\$2.69M	+39.9%	9.07M	+1.05M	+13.1%	\$1.04	+\$0.20
Convenience	\$8.73M	+\$0.98M	+12.6%	3.13M	-0.34M	-9.9%	\$2.79	+\$0.56

All Varieties by Volume



Top 10 Items: All Varieties



2022 Q3: West North Central Division

Yellows Rise While Reds Still Fall

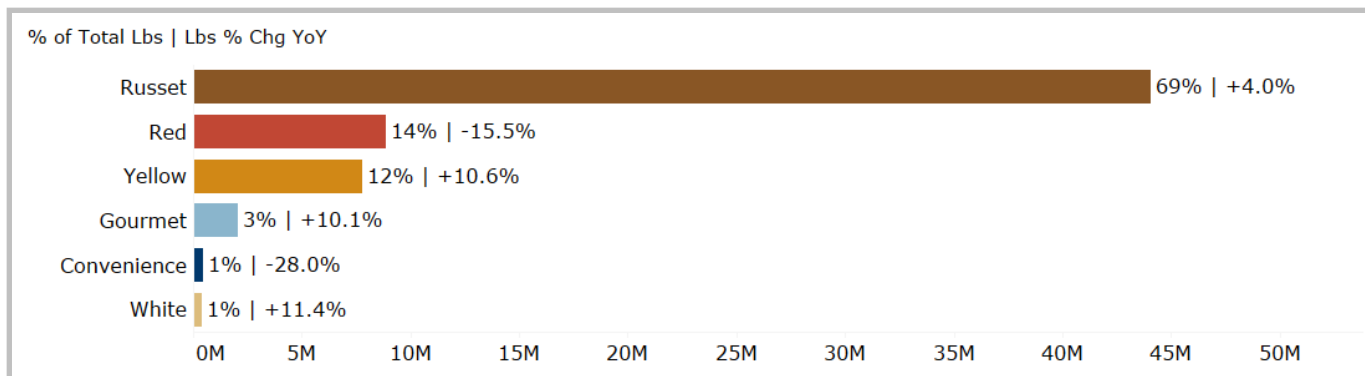
In Q3 2022, total russet dollars in the W.N. Central division were up +37.4%, while volume was up +4.0%. Convenience is the only variety in the division that experienced dollar and volume decreases this quarter.

5lb bags are the top selling pack size in the W.N. Central division overall, carrying 51% 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 +41.3% compared to year ago.

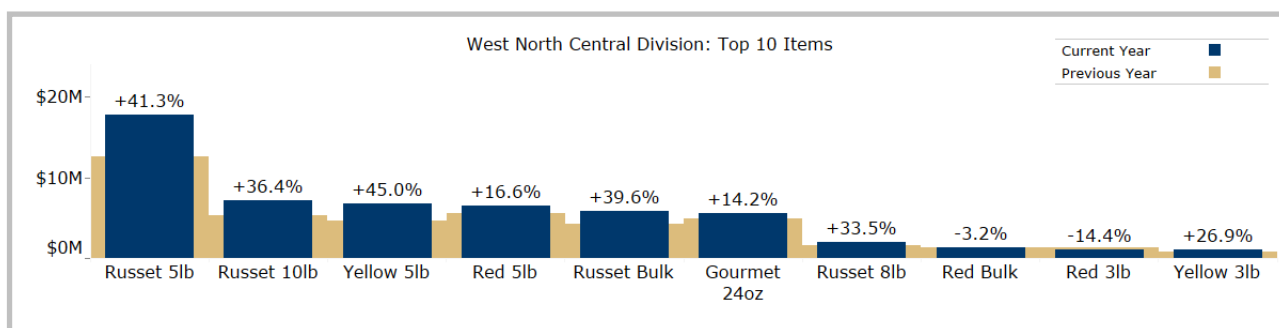
Q3 Performance: All Varieties

	Dollars	\$ Chg vs LY	\$ % Chg YoY	Volume (Lbs)	Vol. Chg vs LY	Vol. % Chg YoY	Avg Price/Lb	Price Per Lb Chg
Grand Total	\$60.99M	+\$13.39M	+28.1%	63.67M	+0.86M	+1.4%	\$0.96	+\$0.20
Russet	\$34.27M	+\$9.33M	+37.4%	44.09M	+1.69M	+4.0%	\$0.78	+\$0.19
Red	\$9.84M	+\$0.75M	+8.3%	8.86M	-1.62M	-15.5%	\$1.11	+\$0.24
Yellow	\$9.68M	+\$2.79M	+40.4%	7.77M	+0.74M	+10.6%	\$1.25	+\$0.26
Gourmet	\$5.63M	+\$0.70M	+14.2%	2.08M	+0.19M	+10.1%	\$2.71	+\$0.10
Convenience	\$1.07M	-\$0.27M	-20.2%	0.48M	-0.19M	-28.0%	\$2.23	+\$0.22
White	\$0.50M	+\$0.08M	+19.2%	0.39M	+0.04M	+11.4%	\$1.28	+\$0.08

All Varieties by Volume



Top 10 Items: All Varieties



2022 Q3: West South Central Division

Russet 5lb Jump in Q3 Sales

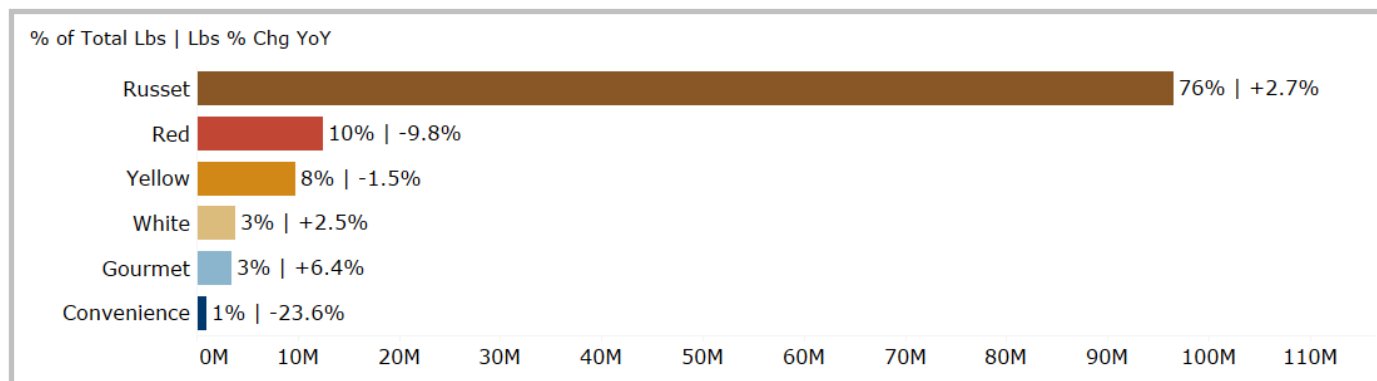
In Q3 2022, total russet dollars in the W.S. Central division were up +39.5%, while volume was up +2.7%. Russets, gourmet, and whites all outperformed previous year volume this quarter; all other varieties fell.

5lb bags 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 +53.1% compared to year ago.

Q3 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	\$113.05M	+\$27.23M	+31.7%	127.15M	+0.99M	+0.8%	\$0.89	+\$0.21
Russet	\$68.81M	+\$19.47M	+39.5%	96.52M	+2.50M	+2.7%	\$0.71	+\$0.19
Red	\$15.36M	+\$2.03M	+15.2%	12.55M	-1.37M	-9.8%	\$1.22	+\$0.27
Yellow	\$11.62M	+\$2.50M	+27.4%	9.82M	-0.15M	-1.5%	\$1.18	+\$0.27
Gourmet	\$9.62M	+\$1.56M	+19.3%	3.46M	+0.21M	+6.4%	\$2.78	+\$0.30
White	\$5.77M	+\$1.98M	+52.4%	3.86M	+0.09M	+2.5%	\$1.50	+\$0.49
Convenience	\$1.87M	-\$0.31M	-14.4%	0.94M	-0.29M	-23.6%	\$1.99	+\$0.21

All Varieties by Volume



Top 10 Items: All Varieties

