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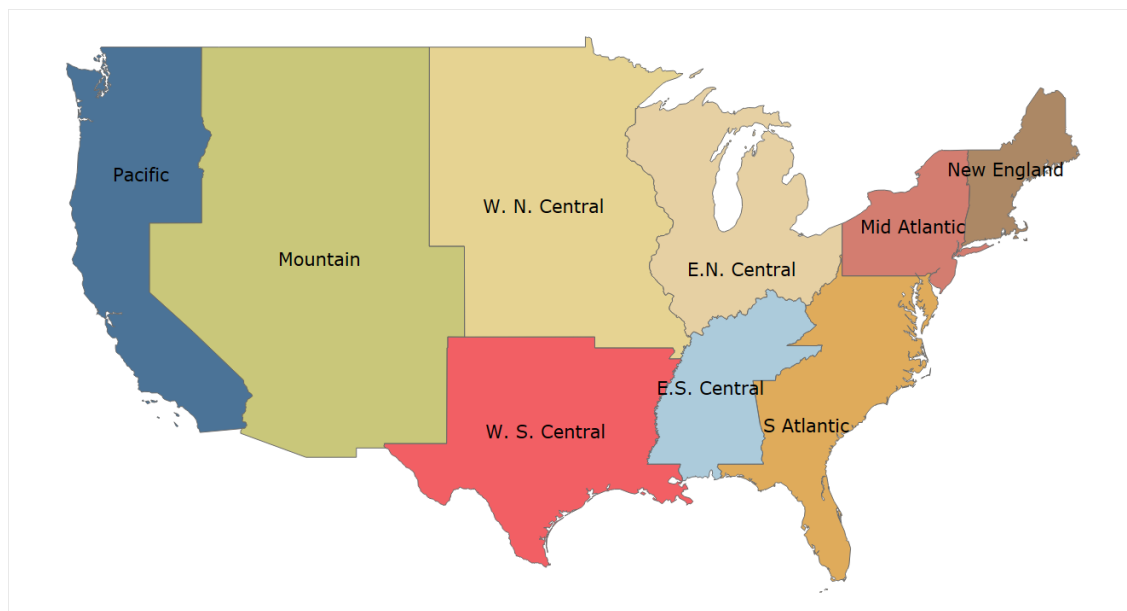
2024 Q3

Idaho Potato Commission

2024 Q3 Potato Category Review

Background

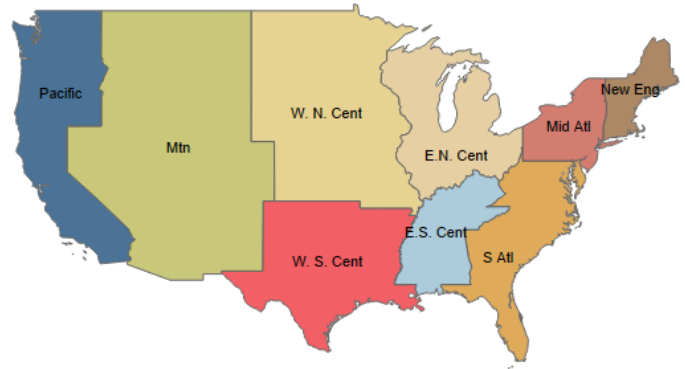
- This report covers all potato performance for the Total U.S. as well as nine U.S. regions, as defined by NielsenIQ.
- Reporting period covers June 30, 2024 - September 28, 2024 vs. the same period last year.
- This report was prepared by Category Partners exclusively for the Idaho Potato Commission.
- 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, June 30, 2024 -September 28, 2024



2024 Q3: Total US

Volume Increases with Dollar Drops

In Q3, total U.S. potato volume grew by 4.3% compared to the same period last year. The East South Central and South Atlantic Divisions were the leading contributors to this growth. The South Atlantic Division, in particular, played a significant role, contributing the most to the national potato volume output. It added 207 million pounds, accounting for 21% of the 961 million pounds of potatoes sold across the U.S. in Q3. This highlights the South Atlantic Division's importance in driving overall potato sales growth in the country.

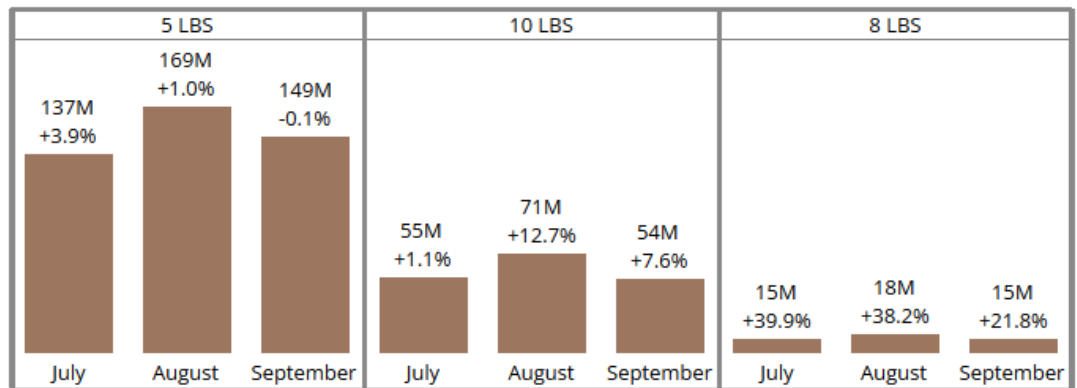


	Dollar Share	Dollars	Dollars % Chg YoY	Volume Share	Volume (Lbs)	Volume (Lbs) % Chg YoY
South Atlantic Division	24%	\$219M	-8.2%	22%	207M	+6.1%
East North Central Division	14%	\$128M	-11.7%	14%	134M	+3.3%
Pacific Division	12%	\$112M	-12.7%	11%	109M	+0.0%
West South Central Division	12%	\$108M	-14.1%	14%	133M	+4.5%
Middle Atlantic Division	12%	\$107M	-6.2%	10%	96M	+4.1%
Mountain Division	8%	\$72M	-16.1%	9%	90M	+5.6%
East South Central Division	7%	\$68M	-12.2%	8%	76M	+7.7%
West North Central Division	6%	\$60M	-11.7%	7%	68M	+4.1%
New England Division	6%	\$53M	-5.7%	5%	47M	+1.5%
Grand Total	100%	\$927M	-10.8%	100%	961M	+4.3%

Strong 8lb Movement

In Q3, 8 lb. russet potatoes showed strong performance, with year-over-year volume growth of over 40% in both July and August, and a 22% increase

Bagged Russet Potato Volume: Q3



in September compared to the same period last year. Similarly, 10 lb. bags of russets also performed well, suggesting a growing consumer preference for larger russet pack sizes.



Top Russet Bags Q3

Russets See Growth in Larger Bags

In Q3, the top five Russet items by volume all experienced positive volume growth. While the 5 lb. Russet bags remain the largest contributor to total Russet volume, other pack sizes are quickly gaining ground. Notably, all but the 1 lb. Russet bag outperformed the 5 lb. bag, with the top three items being larger than 5 lbs., signaling a shift in consumer preference toward larger pack sizes. The 1 lb. bag, though generating less volume, posted higher sales than the 10 lb. Russet bag. The

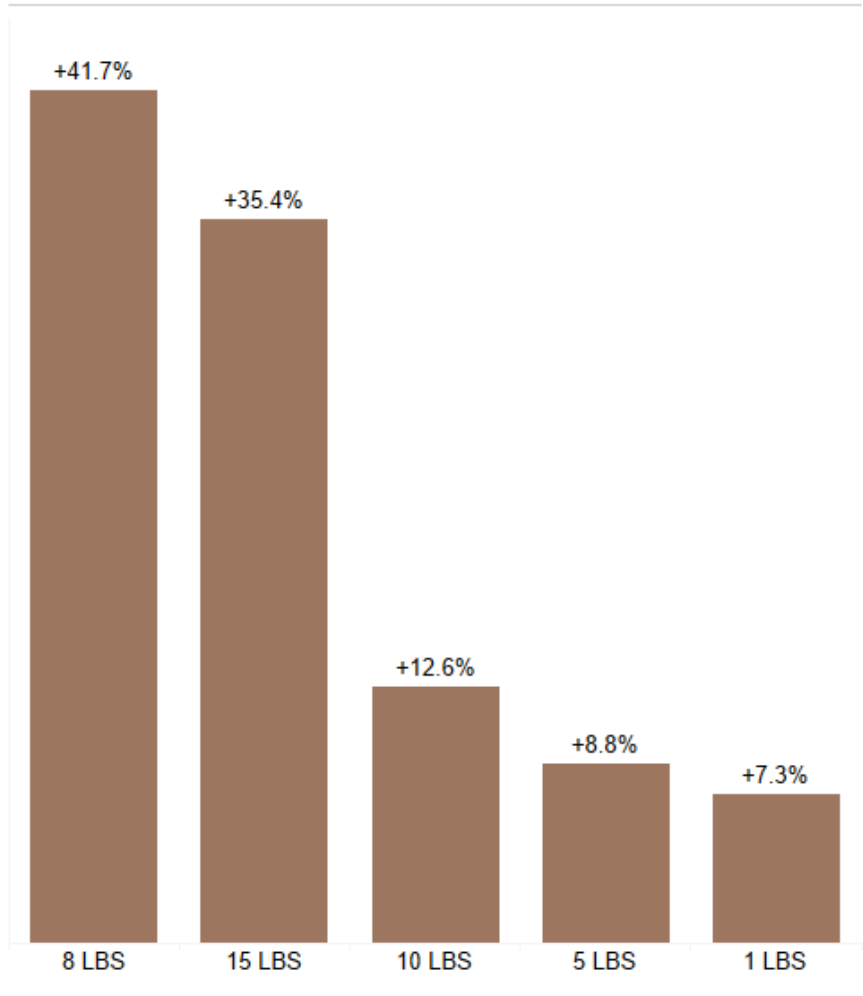


standout performer this quarter was the 8 lb. bag, which saw rapid growth of over 41% compared to Q3 last

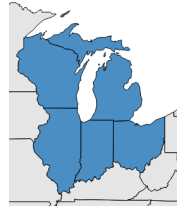
year. If this trend toward larger pack sizes continues, they may soon rival the 5 lb. bag for the top position in total volume output. This shift suggests that consumers are increasingly seeking greater value and convenience through larger Russet pack sizes, which could significantly impact future sales strategies.

Top 5 Russets Sizes by Volume

	Volume (Lbs)	Volume (Lbs) % Chg YoY	Dollars
5 LBS	299M	+8.8%	\$188M
10 LBS	161M	+12.6%	\$79M
1 LBS	85M	+7.3%	\$92M
8 LBS	44M	+41.7%	\$32M
15 LBS	16M	+35.4%	\$5M



2024 Q3: East North Central Division



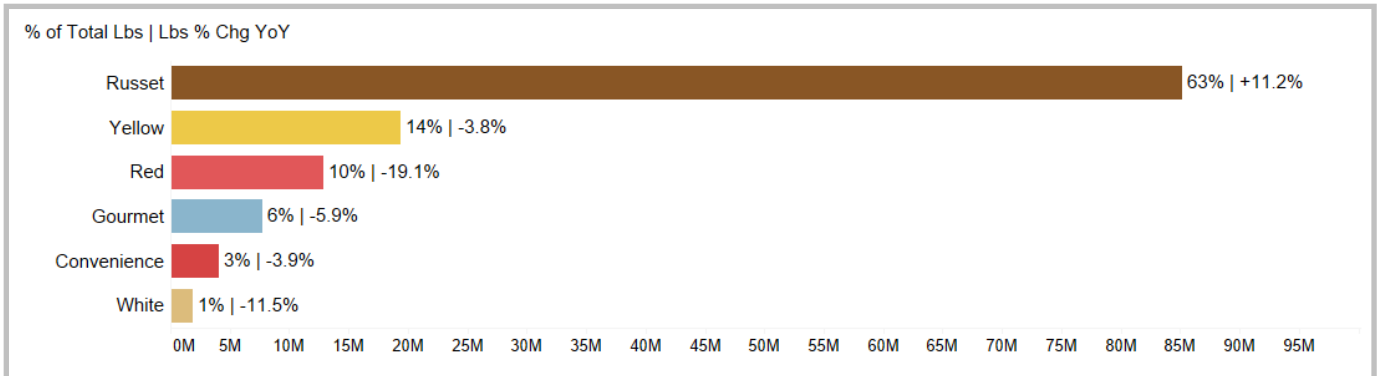
Russet Volume Leads

In Q3, the East North Central Division saw an 11.2% increase in russet potato volume compared to the same quarter last year, translating to over 8.5 million additional pounds sold. The 10 lb., 8 lb., and 5 lb. russet bags experienced the highest volume growth, indicating a growing consumer preference for larger russet pack sizes.

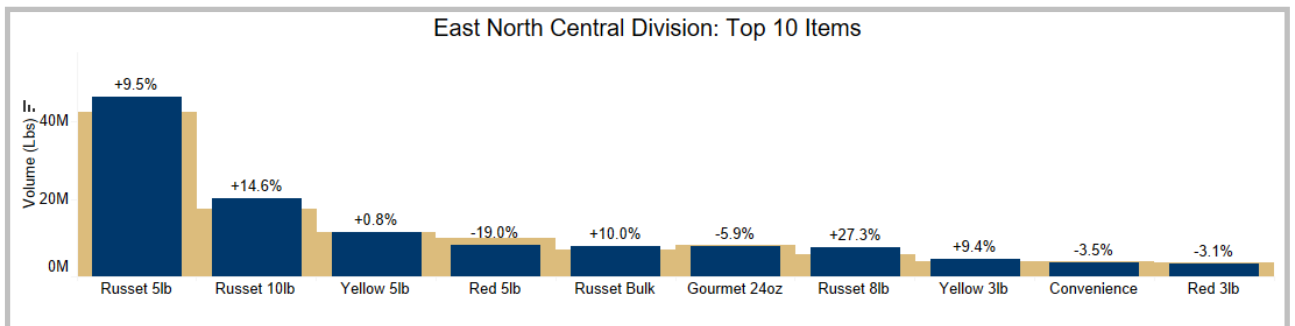
Q3 Performance: All Varieties

	Dollars	Dollars % Chg YoY	Volume (Lbs)	Volume (Lbs) % Chg YoY	Volume Chg YoY
Grand Total	\$128.1M	-11.7%	134.5M	+3.3%	+4.3M
Russet	\$56.1M	-17.2%	85.2M	+11.2%	+8.6M
Yellow	\$23.0M	-1.4%	19.4M	-3.8%	-0.8M
Gourmet	\$18.8M	-6.1%	7.7M	-5.9%	-0.5M
Red	\$15.0M	-15.4%	12.9M	-19.1%	-3.0M
Convenience	\$9.0M	-8.3%	4.1M	-3.9%	-0.2M
White	\$1.7M	-19.5%	1.9M	-11.5%	-0.2M

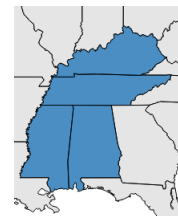
All Varieties by Volume



Top 10 Items: All Varieties Volume



2024 Q3: East South Central Division



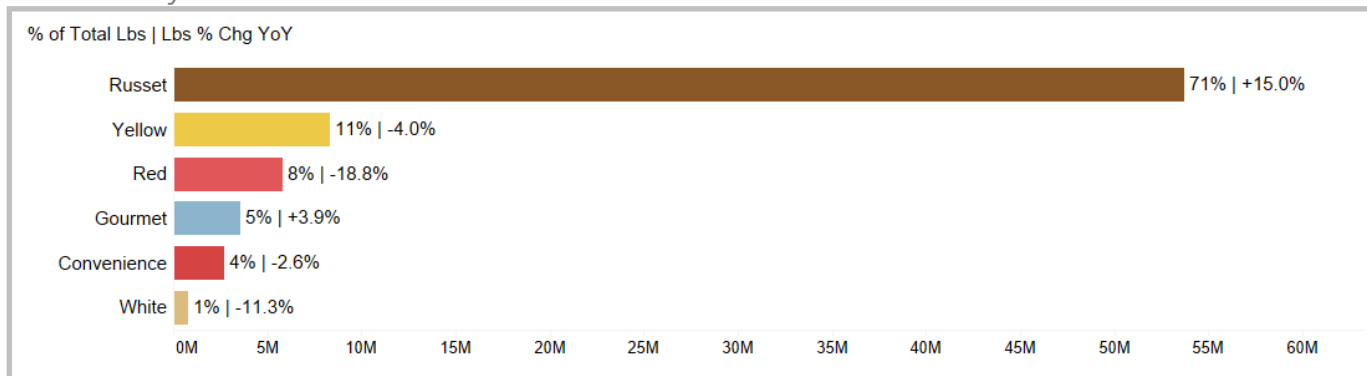
Russets Lead with Growing Segments

In Q3, the East South Central Division saw a strong performance with russet potatoes increasing by 15% in volume, adding 7 million additional pounds sold. While the gourmet category is also showing positive growth in the region, russets continue to dominate, with the top 10 items, including 5 lb., 10 lb., and 8 lb. bags, as well as bulk russets, all achieving volume growth this quarter.

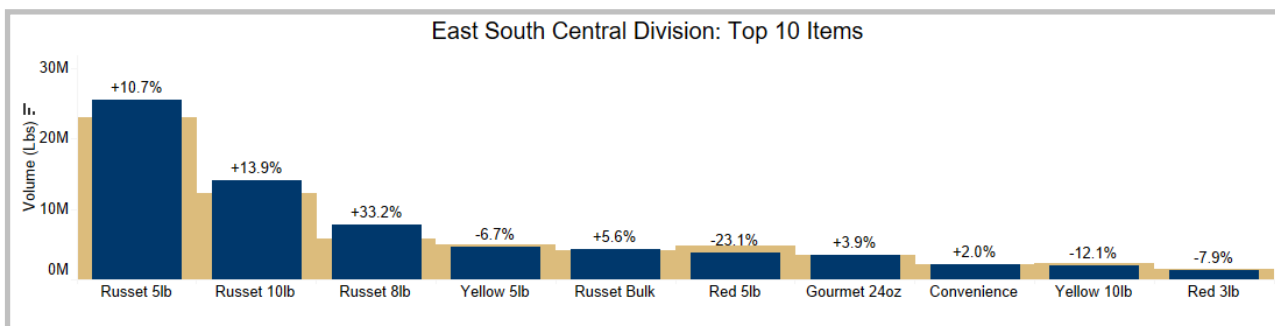
Q3 Performance: All Varieties

	Dollars	≠	Dollars % Chg YoY	Volume (Lbs)	Volume (Lbs) % Chg YoY	Volume Chg YoY
Grand Total	\$67.9M		-12.2%	75.9M	+7.7%	+5.4M
Russet	\$35.2M		-16.2%	53.7M	+15.0%	+7.0M
Yellow	\$9.4M		-5.2%	8.3M	-4.0%	-0.3M
Gourmet	\$8.4M		-0.8%	3.6M	+3.9%	+0.1M
Red	\$7.4M		-12.0%	5.8M	-18.8%	-1.4M
Convenience	\$5.5M		-12.4%	2.7M	-2.6%	-0.1M
White	\$0.7M		-24.5%	0.8M	-11.3%	-0.1M

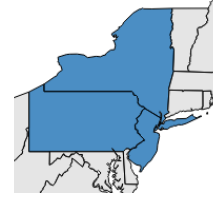
All Varieties by Volume



Top 10 Items: All Varieties Volume



2024 Q3: Middle Atlantic Division



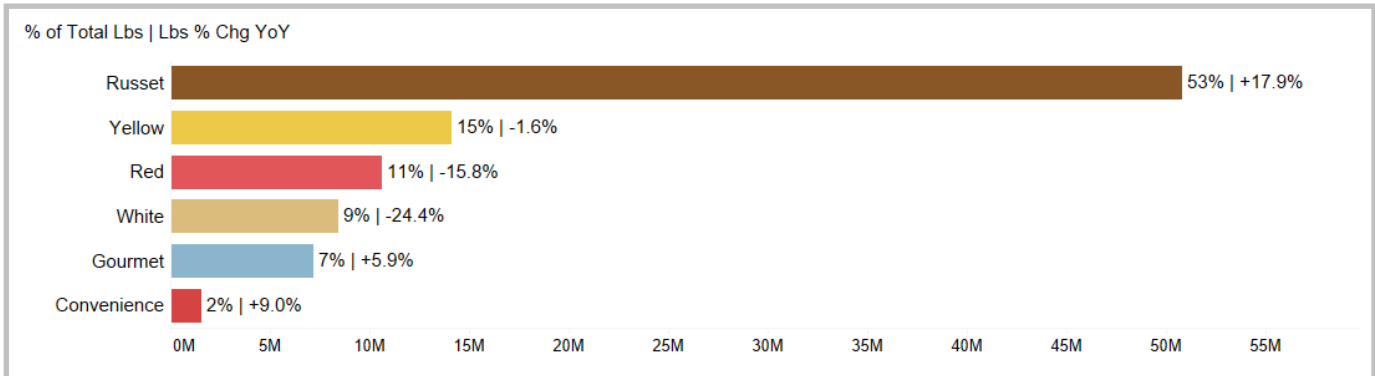
Gourmet Potatoes Outperform Division

In Q3, the Middle Atlantic Division posted a 17.9% increase in russet potato volume, adding 7.7 million extra pounds compared to Q3 last year. This was a key driver behind the division's overall growth of 3.8 million pounds in total potato volume. Gourmet and Convenience items also contributed to the positive momentum. The Russet 5 lb. and 8 lb. bags showed healthy volume growth, while the Russet Bulk item stood out with an impressive 45% increase, suggesting rising demand for russet bulk options in this region.

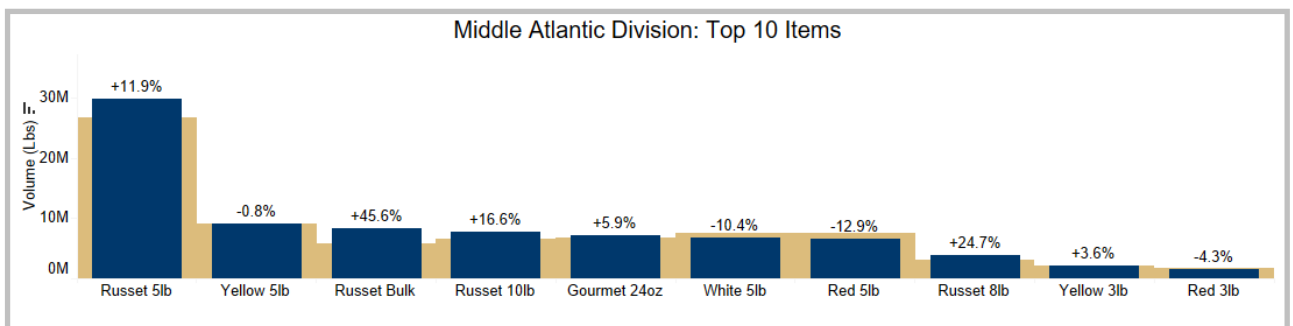
Q3 Performance: All Varieties

	Dollars	≡	Dollars % Chg YoY	Volume (Lbs)	Volume (Lbs) % Chg YoY	Volume Chg YoY
Grand Total	\$107.5M		-6.2%	96.0M	+4.1%	+3.8M
Russet	\$40.2M		-4.4%	50.8M	+17.9%	+7.7M
Yellow	\$18.1M		-2.3%	14.1M	-1.6%	-0.2M
Gourmet	\$17.7M		+7.3%	7.2M	+5.9%	+0.4M
Red	\$13.6M		-16.0%	10.6M	-15.8%	-2.0M
White	\$7.8M		-31.3%	8.4M	-24.4%	-2.7M
Convenience	\$4.7M		-1.9%	1.6M	+9.0%	+0.1M

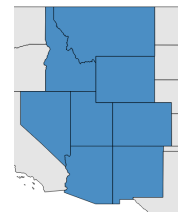
All Varieties by Volume



Top 10 Items: All Varieties Volume



2024 Q3: Mountain Division



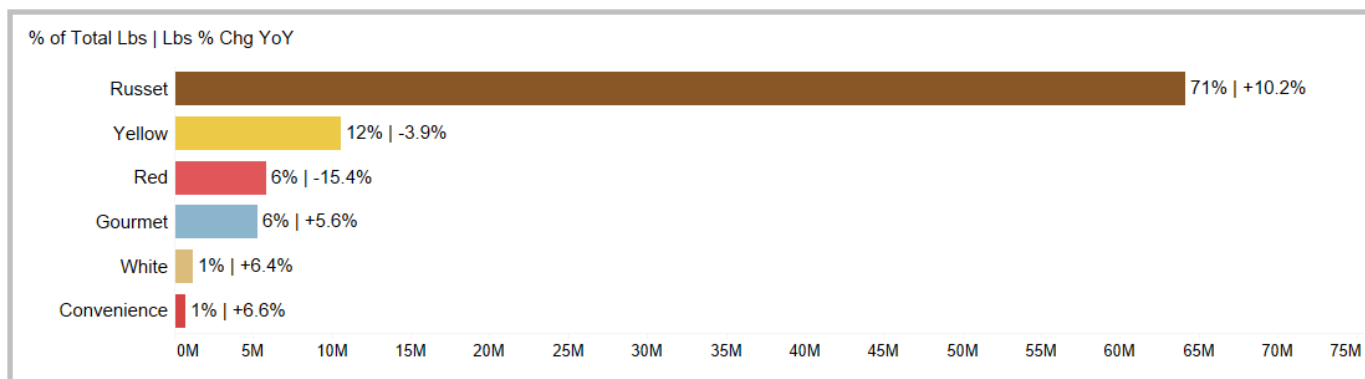
Russets and Gourmet Drive Market Performance

In Q3, the Mountain Division experienced strong volume performance, with four out of six potato varieties growing in volume. Russet and gourmet potatoes led this growth, contributing a combined additional 6.2 million pounds sold compared to Q3 last year. Russets dominate 71% of this market, and all major russet pack sizes—including 5 lb., 10 lb., 15+ lb., and 8 lb. bags—showed significant volume increases, indicating a rising consumer preference for larger russet pack sizes in this region.

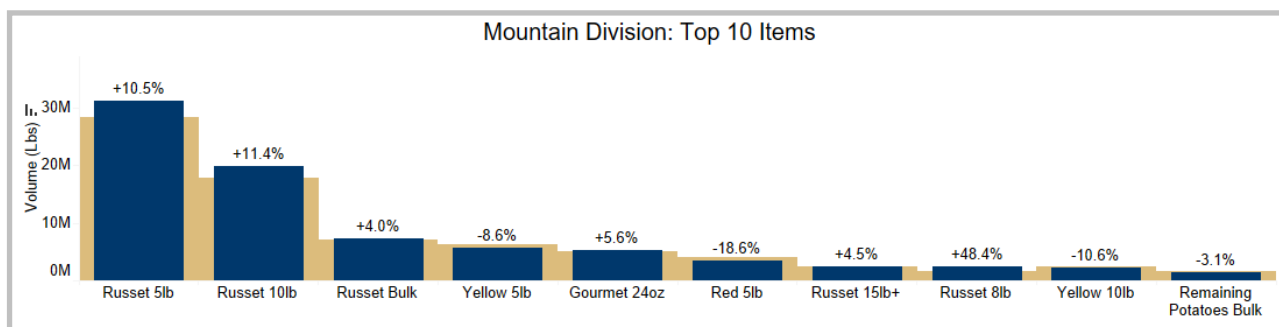
Q3 Performance: All Varieties

	Dollars	≡	Dollars % Chg YoY	Volume (Lbs)	Volume (Lbs) % Chg YoY	Volume Chg YoY
Grand Total	\$71.6M		-16.1%	90.5M	+5.6%	+4.8M
Russet	\$34.2M		-23.4%	64.2M	+10.2%	+5.9M
Gourmet	\$12.8M		-1.6%	5.3M	+5.6%	+0.3M
Yellow	\$11.5M		-8.2%	10.5M	-3.9%	-0.4M
Red	\$6.9M		-15.6%	5.8M	-15.4%	-1.1M
Convenience	\$1.8M		-2.0%	0.7M	+6.6%	+0.0M
White	\$1.1M		-17.4%	1.2M	+6.4%	+0.1M

All Varieties by Volume



Top 10 Items: All Varieties Volume



Source: Idaho Potato Commission and Category Partners, powered by NielsenIQ Syndicated, Jun 30, 2024 through Sep 28, 2024

2024 Q3: New England Division

Gourmet and Convenience Post Volume Success



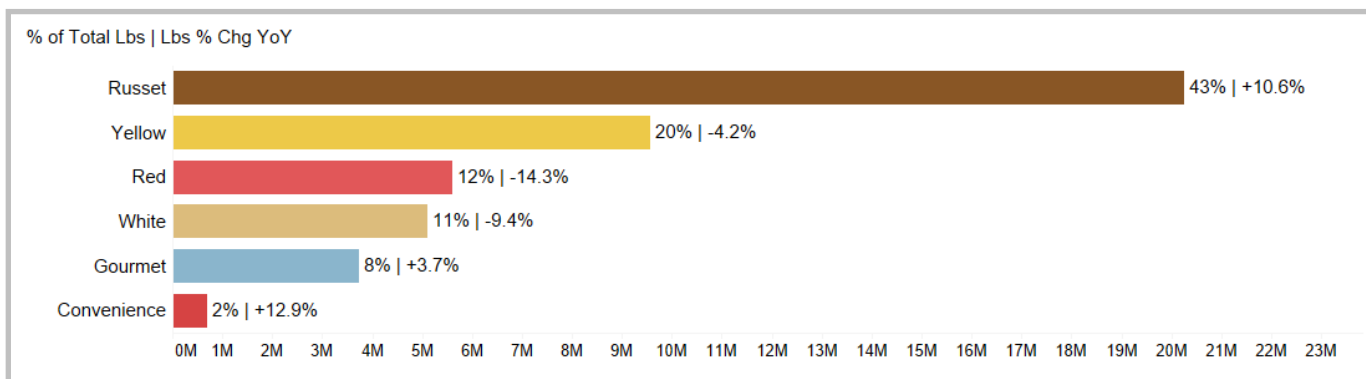
In Q3, the New England Division increased its total potato volume by 1.5% compared to the same quarter last year, driven primarily by an additional 2 million pounds of russet potatoes sold. The Gourmet and Convenience varieties occupy a larger share of the market in this division compared to other divisions and showed positive growth in both sales and variety. The 24 oz Gourmet item was particularly more popular, achieving a 3.7% volume increase.

Additionally, the Russet 5 lb., Russet Bulk, and Russet 10 lb. items saw notable volume growth, indicating a growing preference for larger russet pack sizes and diverse gourmet options, especially the Gourmet 24 oz.

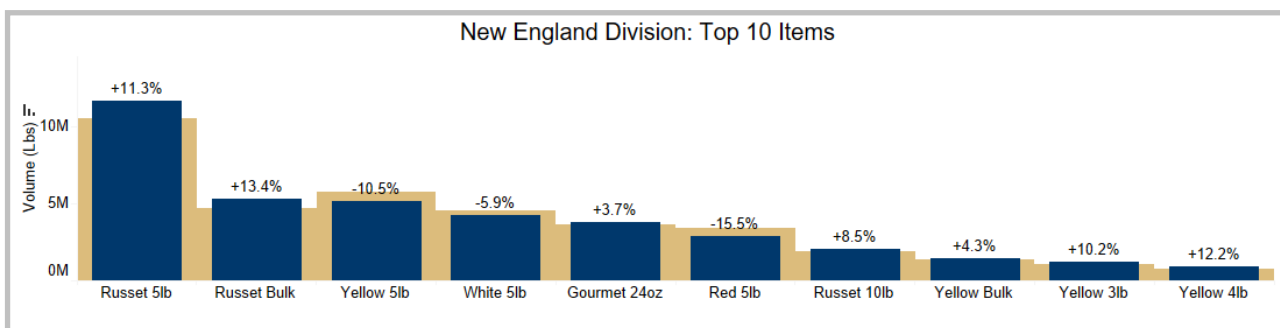
Q3 Performance: All Varieties

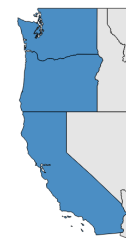
	Dollars	Dollars % Chg YoY	Volume (Lbs)	Volume (Lbs) % Chg YoY	Volume Chg YoY
Grand Total	\$53.2M	-5.7%	46.9M	+1.5%	+0.7M
Russet	\$16.8M	-8.8%	20.3M	+10.6%	+2.0M
Yellow	\$11.2M	-4.9%	9.6M	-4.2%	-0.4M
Gourmet	\$9.6M	+5.9%	3.7M	+3.7%	+0.1M
Red	\$6.6M	-12.8%	5.6M	-14.3%	-0.9M
White	\$4.0M	-17.9%	5.1M	-9.4%	-0.5M
Convenience	\$2.2M	+5.8%	0.7M	+12.9%	+0.1M

All Varieties by Volume



Top 10 Items: All Varieties Volume





2024 Q3: Pacific Division

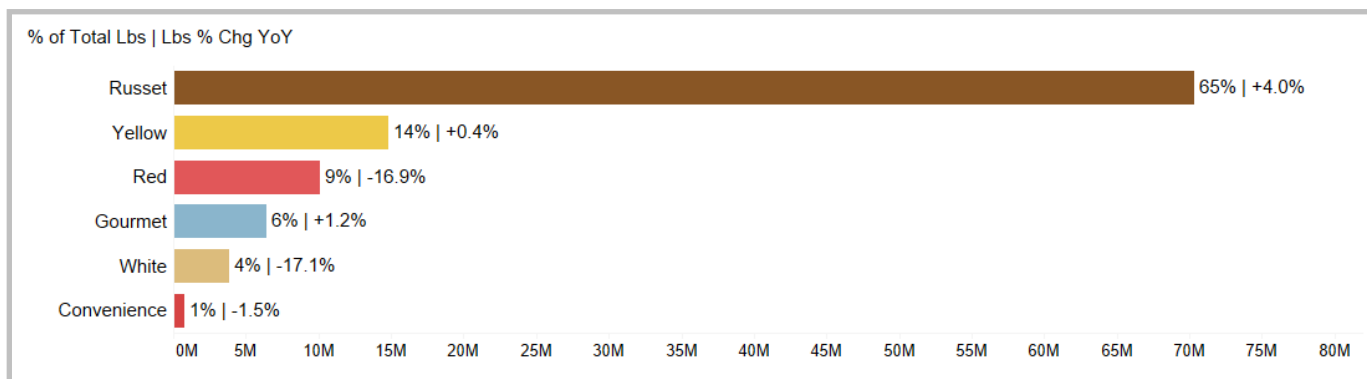
Russets Lead Market with Yellows Basically Flat

In Q3, the Pacific Division was one of the few divisions to achieve volume growth across Russet, Yellow, and Gourmet varieties. Russet potatoes led the way, adding 2.7 million pounds in additional volume. The top 5 items in this division all showed positive volume growth, with the Russet 10 lb. and Russet Bulk items seeing the largest increases. Notably, the Russet 10 lb. bag outperformed the Russet 5 lb. bag, indicating a shift in consumer preference toward larger russet pack sizes in this market.

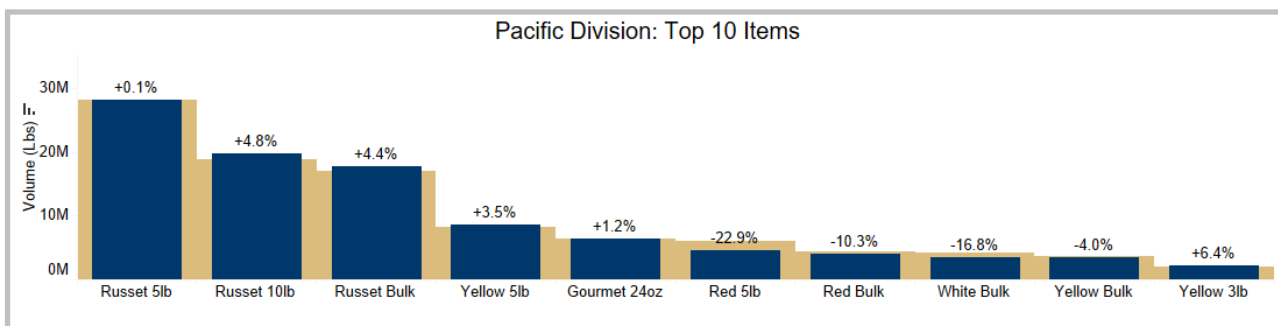
Q3 Performance: All Varieties

	Dollars	≡	Dollars % Chg YoY	Volume (Lbs)	Volume (Lbs) % Chg YoY	Volume Chg YoY
Grand Total	\$112.1M		-12.7%	109.0M	+0.0%	+0.0M
Russet	\$49.8M		-17.9%	70.3M	+4.0%	+2.7M
Yellow	\$19.0M		-4.5%	14.8M	+0.4%	+0.1M
Gourmet	\$16.8M		-1.2%	6.4M	+1.2%	+0.1M
Red	\$12.8M		-17.5%	10.1M	-16.9%	-2.0M
White	\$5.5M		-20.9%	3.9M	-17.1%	-0.8M
Convenience	\$2.4M		-4.9%	0.8M	-1.5%	+0.0M

All Varieties by Volume



Top 10 Items: All Varieties Volume



Source: Idaho Potato Commission and Category Partners, powered by NielsenIQ Syndicated, Jun 30, 2024 through Sep 28, 2024

2024 Q3: South Atlantic Division



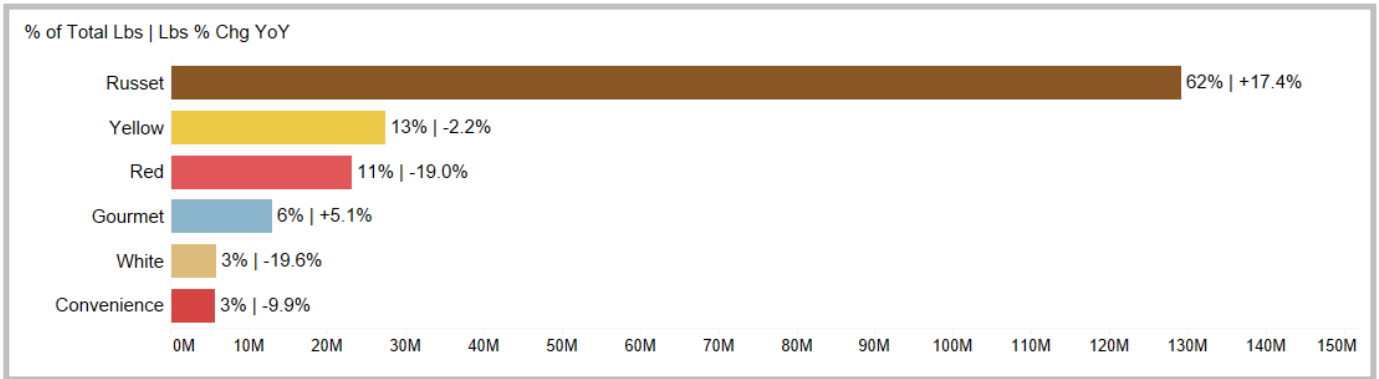
Russet and Gourmet Varieties Drive Division Volume Growth

In Q3, the South Atlantic Division saw remarkable growth in Russet volume, increasing by 17.4% and adding an impressive 19.2 million pounds compared to Q3 last year. The Russet 5 lb. and 10 lb. bags were key contributors, with the 5 lb. bags growing by 17.1% and the 10 lb. bags by 15.1%. The Russet 8 lb. bag also played a significant role, surging by nearly 70% in volume—demonstrating a strong consumer demand for this pack size in the region.

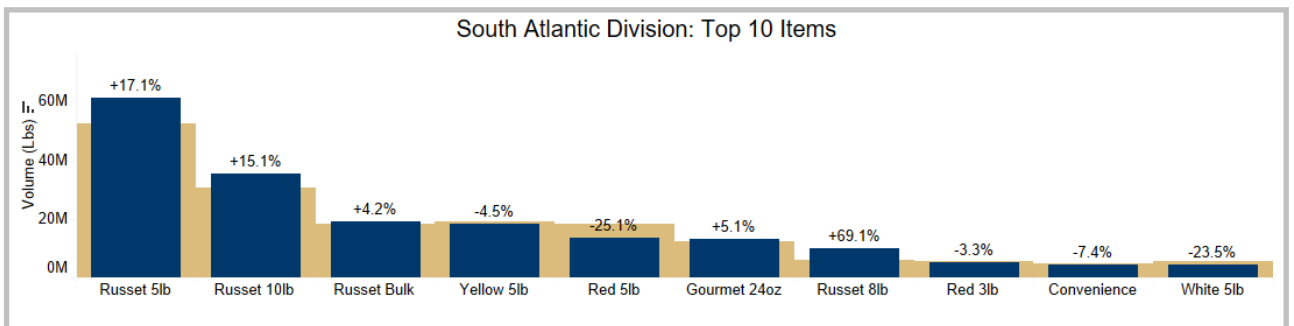
Q3 Performance: All Varieties

	Dollars	Dollars % Chg YoY	Volume (Lbs)	Volume (Lbs) % Chg YoY	Volume Chg YoY
Grand Total	\$218.9M	-8.2%	207.4M	+6.1%	+11.9M
Russet	\$99.2M	-8.1%	129.2M	+17.4%	+19.2M
Yellow	\$35.0M	-1.5%	27.6M	-2.2%	-0.6M
Red	\$30.7M	-14.5%	23.1M	-19.0%	-5.4M
Gourmet	\$29.2M	-1.2%	13.0M	+5.1%	+0.6M
Convenience	\$13.5M	-13.8%	5.7M	-9.9%	-0.6M
White	\$6.8M	-23.6%	5.8M	-19.6%	-1.4M

All Varieties by Volume

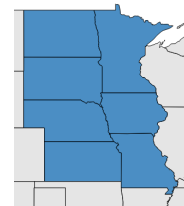


Top 10 Items: All Varieties Volume



2024 Q3: West North Central Division

Russet, Gourmet, and Yellow Drive Division Performance

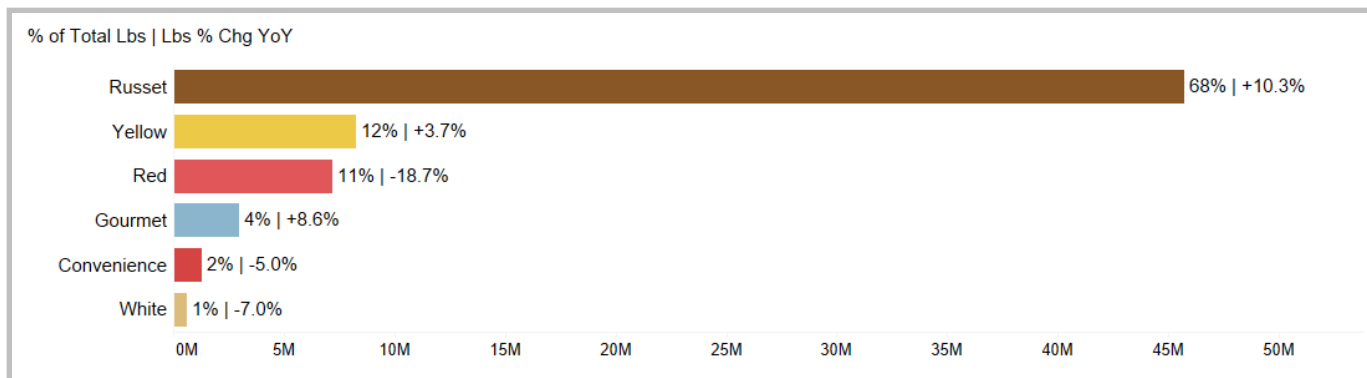


In Q3, the West North Central Division experienced strong growth across Russet, Yellow, and Gourmet varieties, with Russet potatoes leading by adding 4.3 million pounds compared to the same quarter last year. Notably, the Russet 10 lb. bag outpaced the Russet 5 lb. bag, achieving a 15.8% increase in volume. The Russet 8 lb. bag also surged this quarter, posting an impressive 50% volume increase, highlighting a trend toward larger pack sizes in the region.

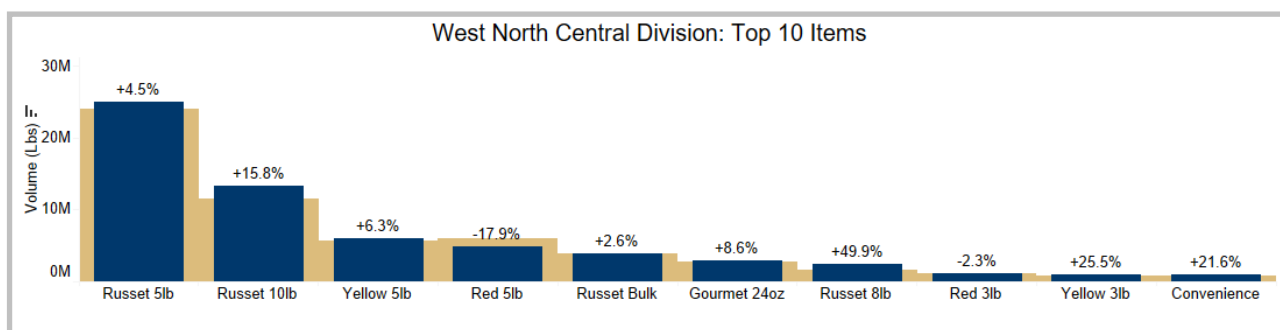
Q3 Performance: All Varieties

	Dollars	≡	Dollars % Chg YoY	Volume (Lbs)	Volume (Lbs) % Chg YoY	Volume Chg YoY
Grand Total	\$59.9M		-11.7%	67.6M	+4.1%	+2.7M
Russet	\$27.9M		-19.3%	45.7M	+10.3%	+4.3M
Yellow	\$10.1M		+4.2%	8.3M	+3.7%	+0.3M
Red	\$8.1M		-11.4%	7.2M	-18.7%	-1.7M
Gourmet	\$7.8M		+5.9%	3.0M	+8.6%	+0.2M
Convenience	\$3.4M		-13.6%	1.3M	-5.0%	-0.1M
White	\$0.4M		-15.2%	0.6M	-7.0%	+0.0M

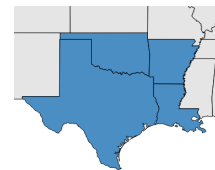
All Varieties by Volume



Top 10 Items: All Varieties Volume



2024 Q3: West South Central Division



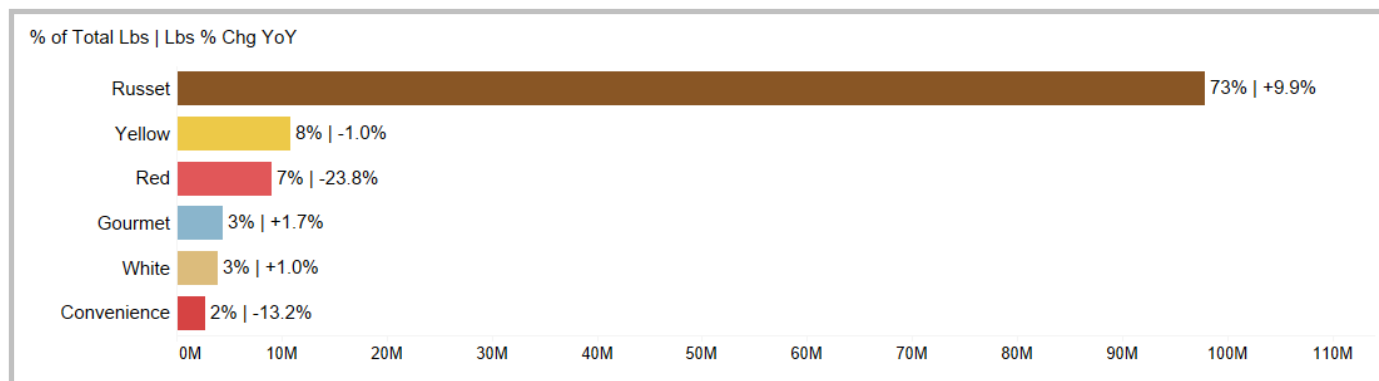
Russets Lead Division; Yellows Post Dollar Increases

In Q3, the West South Central Division achieved a 4.5% growth in total volume, with Russet potatoes leading the way, adding 8.8 million pounds compared to the same period last year. This division was also the only one to see an increase in white potato volume. Russets dominate the market, accounting for over 73% of total volume. The Russet 10 lb. bag outperformed the 5 lb. bag, while the Russet 15+ lb. and 8 lb. bags both saw significant growth, with each increasing by over 40%. This highlights the region's strong preference for larger Russet pack sizes.

Q3 Performance: All Varieties

	Dollars	Dollars % Chg YoY	Volume (Lbs)	Volume (Lbs) % Chg YoY	Volume Chg YoY
Grand Total	\$108.2M	-14.1%	133.2M	+4.5%	+5.7M
Russet	\$54.8M	-19.6%	97.8M	+9.9%	+8.8M
Yellow	\$13.9M	+3.0%	10.8M	-1.0%	-0.1M
Red	\$11.7M	-13.5%	9.0M	-23.8%	-2.8M
Gourmet	\$11.2M	-4.7%	4.5M	+1.7%	+0.1M
White	\$5.6M	-9.0%	4.0M	+1.0%	+0.0M
Convenience	\$5.1M	-16.4%	2.8M	-13.2%	-0.4M

All Varieties by Volume



Top 10 Items: All Varieties Volume

