



2024 Q4

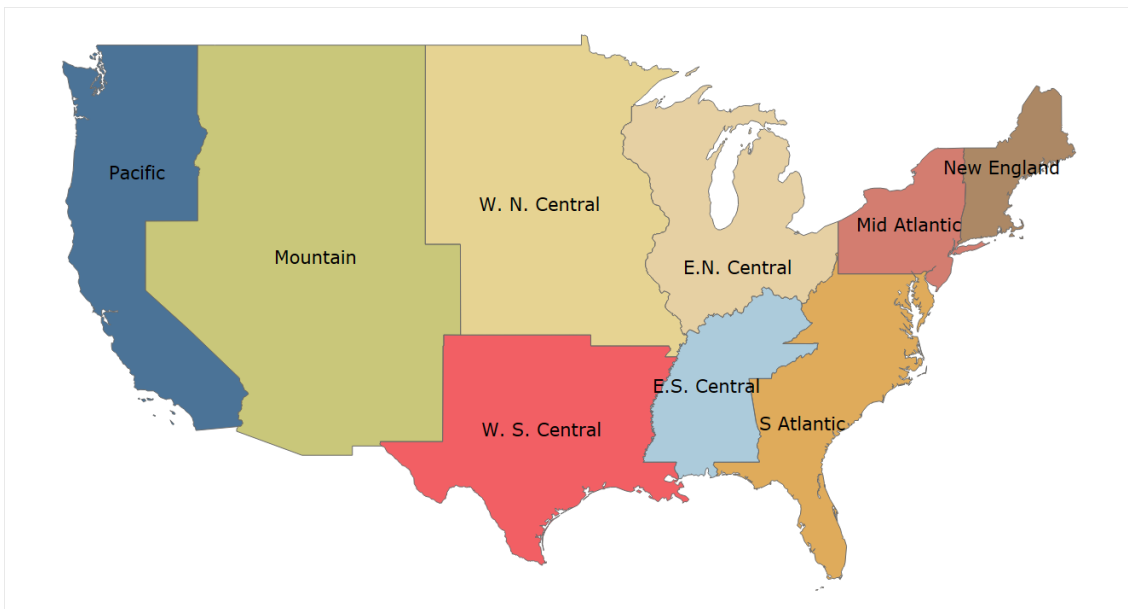
# Potato Category Review

Idaho Potato Commission

# 2024 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 September 29, 2024 - December 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
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# 2024 Q4: Total US

## Volume Increases with Dollar Drops

For the total United States, potato sales declined by 4.5% in dollars and 1.1% in volume, indicating a weaker quarter compared to the same period last year. The West South Central and South Atlantic Divisions were the biggest contributors to the sales deficit, representing 38% of the total loss or \$18.3M. On the volume side, five out of the nine divisions saw volume increases, but these were not enough to offset the declines from the other four divisions. The West South Central Division experienced a loss of 9.1 million pounds, while the East North Central Division lost 5.4 million pounds. Despite the overall challenges, the South Atlantic Division stood out as the highest performer, with a 1.4% increase in volume.

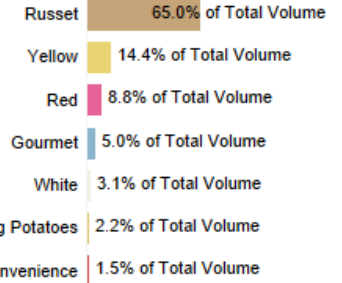
## Russets Gain Volume and Lose Sales Dollars

Russets have struggled to generate sales dollars over the past quarter due to deflation. However, Russets continue to drive increases in volume and increase in penetration of total potatoes. Russets continue to provide tremendous value to the customer.

RESULTS ARE FOR DATES: 9/29/2024 THRU 12/28/2024

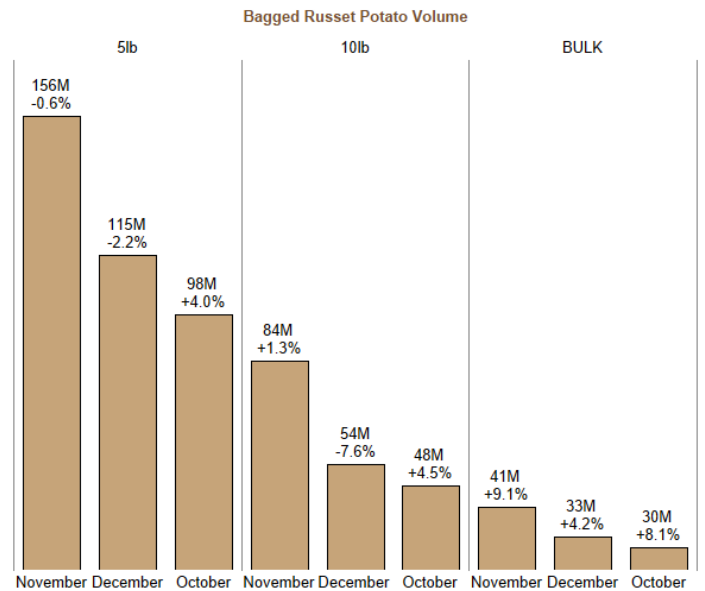


### Varieties by Volume: Total US

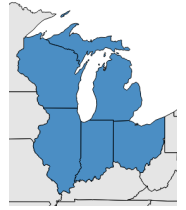


	Dollars	Dollars % Chg YoY	Dollars Chg YoY	% of Total Dollars	Volume (Lbs)	Volume (Lbs) % Chg YoY	Volume Chg YoY	% of Total Volume
South Atlantic Division	\$240M	-3.4%	-\$8.4M	23.4%	240M	+1.4%	+3.3M	21%
East North Central Division	\$140M	-3.8%	-\$5.6M	13.6%	165M	-3.2%	-5.4M	14%
Pacific Division	\$136M	-3.2%	-\$4.5M	13.2%	139M	-1.1%	-1.6M	12%
Middle Atlantic Division	\$121M	-3.9%	-\$4.9M	11.8%	125M	+0.3%	+0.3M	11%
West South Central Division	\$112M	-8.1%	-\$9.9M	10.9%	145M	-5.9%	-9.1M	13%
Mountain Division	\$80M	-7.3%	-\$6.3M	7.8%	106M	-1.1%	-1.2M	9%
East South Central Division	\$71M	-5.6%	-\$4.2M	6.9%	85M	+0.1%	+0.1M	7%
West North Central Division	\$68M	-2.3%	-\$1.6M	6.6%	86M	+0.8%	+0.7M	7%
New England Division	\$60M	-5.2%	-\$3.3M	5.9%	62M	+0.1%	+0.0M	5%
<b>Grand Total</b>	<b>\$1,029M</b>	<b>-4.5%</b>	<b>-\$48.5M</b>	<b>100.0%</b>	<b>1,154M</b>	<b>-1.1%</b>	<b>-12.9M</b>	<b>100%</b>

RESULTS ARE FOR DATES: 9/29/2024 THRU 12/28/2024



# 2024 Q4: East North Central Division



## Red Potatoes Lose Significant Volume

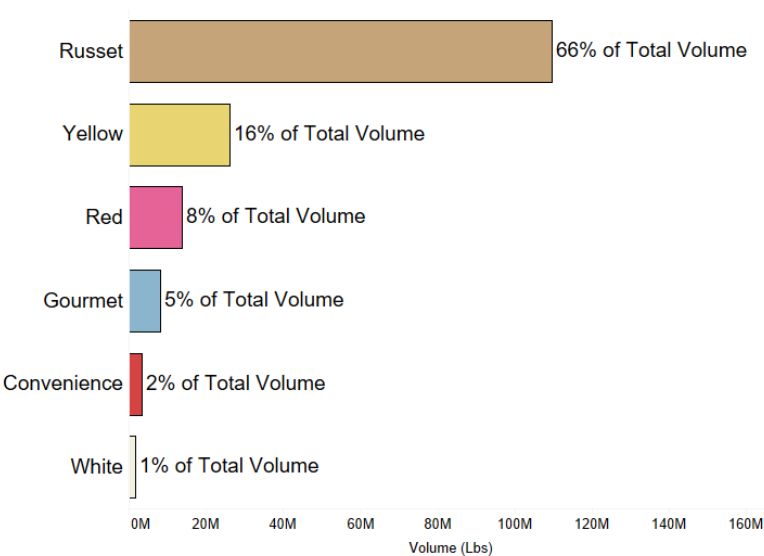
In the East North Central Division, total potato sales decreased by \$5.6 million, largely due to a 9% drop in Russet potato sales compared to Q4 of the previous year. Although Yellow and Gourmet potatoes contributed an additional \$3 million in sales, it wasn't enough to offset the overall decline. Volume also saw a significant decrease of -3.2%, with Red potatoes experiencing the steepest loss, dropping 3.7 million in volume.

RESULTS ARE FOR DATES: 9/29/2024 THRU 12/28/2024

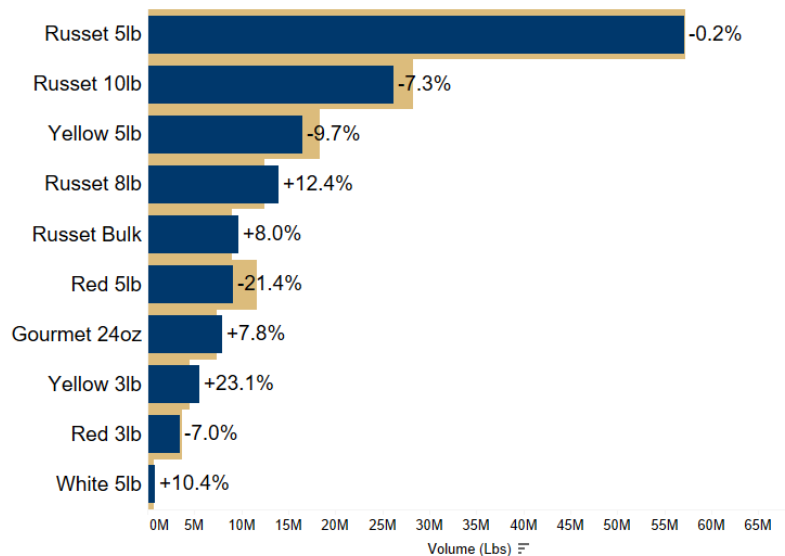
### East North Central Division Variety Breakdown

	Dollars	Dollars % Chg YoY	Dollars Chg YoY	Volume (Lbs)	Volume (Lbs) % Chg YoY	Volume Chg YoY
Russet	\$65.2M	-9.0%	-\$6.4M	109.5M	-0.2%	-0.2M
Yellow	\$27.4M	+4.7%	+\$1.2M	26.1M	-6.8%	-1.9M
Gourmet	\$20.3M	+9.6%	+\$1.8M	8.0M	+7.8%	+0.6M
Red	\$14.3M	-11.3%	-\$1.8M	13.8M	-20.9%	-3.7M
Convenience	\$7.5M	-2.4%	-\$0.2M	3.4M	+2.3%	+0.1M
White	\$1.7M	-8.1%	-\$0.2M	1.7M	-4.5%	-0.1M
<b>Grand Total</b>	<b>\$140.3M</b>	<b>-3.8%</b>	<b>-\$5.6M</b>	<b>165.1M</b>	<b>-3.2%</b>	<b>-5.4M</b>

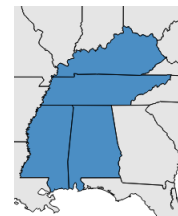
All Varieties by Volume: East North Central Division



East North Central Division: Top 10 Items for Volume



# 2024 Q4: East South Central Division



## Russets Drive Sales Decrease in Dollars with Deflation

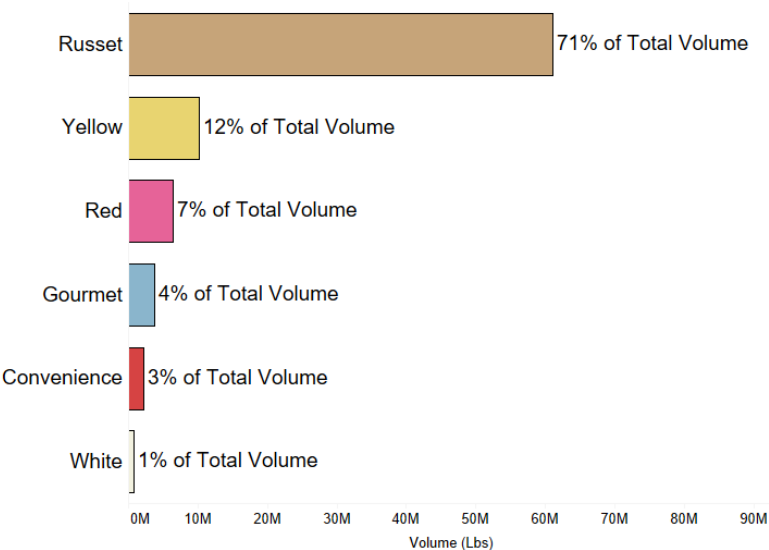
In the East South Central Division, total potato sales declined by 5.6%, primarily driven by a decrease in Russet potato sales. Russets, which make up 71% of total volume in this market, lost \$4 million in sales, accounting for approximately 95% of the total sales decline. However, Russets saw a 3.1% increase in volume, indicating that lower prices contributed to higher demand. Additionally, both Russet Bulk and 8lb pack sizes gained popularity, growing by around 10% compared to Q4 of the previous year.

RESULTS ARE FOR DATES: 9/29/2024 THRU 12/28/2024

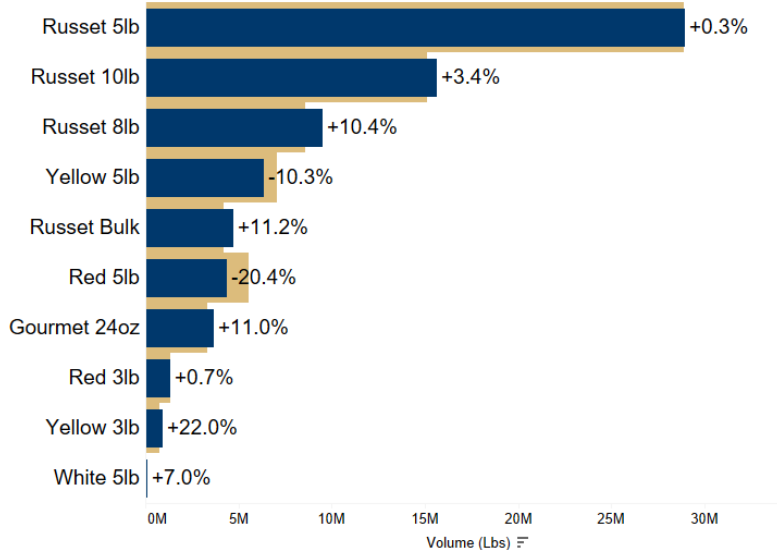
### East South Central Division Variety Breakdown

	Dollars	Dollars % Chg YoY	Dollars Chg YoY	Volume (Lbs)	Volume (Lbs) % Chg YoY	Volume Chg YoY
Russet	\$38.1M	-9.5%	-\$4.0M	61.0M	+3.1%	+1.8M
Yellow	\$10.5M	-1.0%	-\$0.1M	10.2M	-7.4%	-0.8M
Gourmet	\$9.1M	+11.6%	+\$0.9M	3.7M	+11.0%	+0.4M
Red	\$6.9M	-9.4%	-\$0.7M	6.4M	-16.5%	-1.3M
Convenience	\$4.6M	-5.2%	-\$0.3M	2.3M	-3.7%	-0.1M
White	\$0.7M	-7.3%	-\$0.1M	0.8M	-9.4%	-0.1M
<b>Grand Total</b>	<b>\$71.2M</b>	<b>-5.6%</b>	<b>-\$4.2M</b>	<b>85.5M</b>	<b>+0.1%</b>	<b>+0.1M</b>

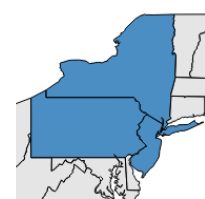
All Varieties by Volume: East South Central Division



East South Central Division: Top 10 Items for Volume



# 2024 Q4: Middle Atlantic Division



## White Potatoes Struggle Year over Year

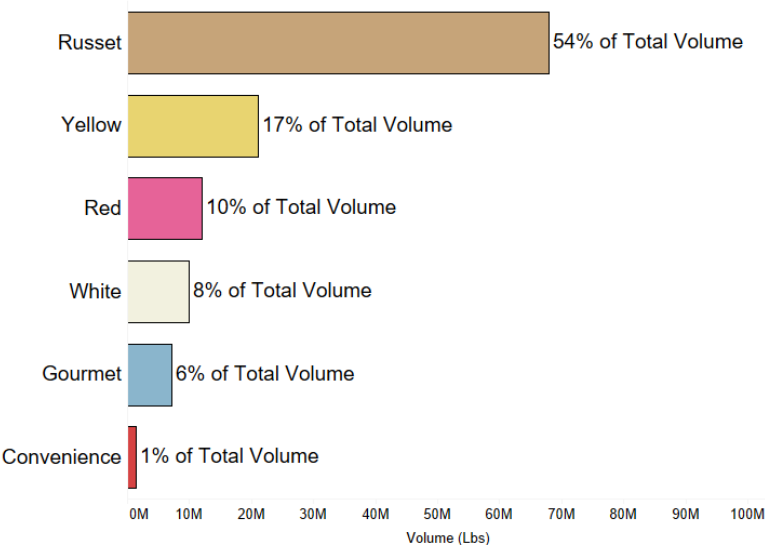
In the Middle Atlantic Division, White potatoes, which make up about 8% of the total potato market, experienced a significant 23.6% decline in sales this quarter compared to the same period last year, losing nearly as much in sales as Russet potatoes, which account for 54% of the volume. On a positive note, Gourmet potatoes performed exceptionally well, contributing an additional \$1 million in sales and 0.3 million in volume.

RESULTS ARE FOR DATES: 9/29/2024 THRU 12/28/2024

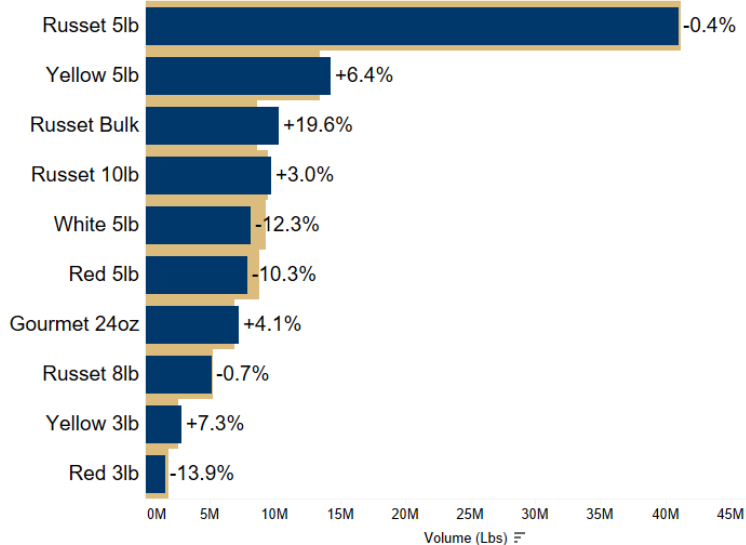
### Middle Atlantic Division Variety Breakdown

	Dollars	Dollars % Chg YoY	Dollars Chg YoY	Volume (Lbs)	Volume (Lbs) % Chg YoY	Volume Chg YoY
Russet	\$48.6M	-5.2%	-\$2.7M	67.9M	+3.1%	+2.0M
Yellow	\$22.6M	+1.4%	+\$0.3M	21.0M	+6.1%	+1.2M
Gourmet	\$17.8M	+5.7%	+\$1.0M	7.2M	+4.1%	+0.3M
Red	\$13.8M	-12.5%	-\$2.0M	12.0M	-13.5%	-1.9M
White	\$7.6M	-23.6%	-\$2.4M	10.0M	-18.5%	-2.3M
Convenience	\$4.3M	+7.0%	+\$0.3M	1.5M	+11.1%	+0.1M
<b>Grand Total</b>	<b>\$121.2M</b>	<b>-3.9%</b>	<b>-\$4.9M</b>	<b>124.6M</b>	<b>+0.3%</b>	<b>+0.3M</b>

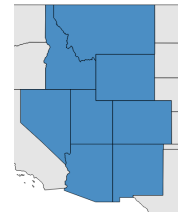
All Varieties by Volume: Middle Atlantic Division



Middle Atlantic Division: Top 10 Items for Volume



# 2024 Q4: Mountain Division



## Russets Shrink Dollars, Yellows & Reds Shrink Volume

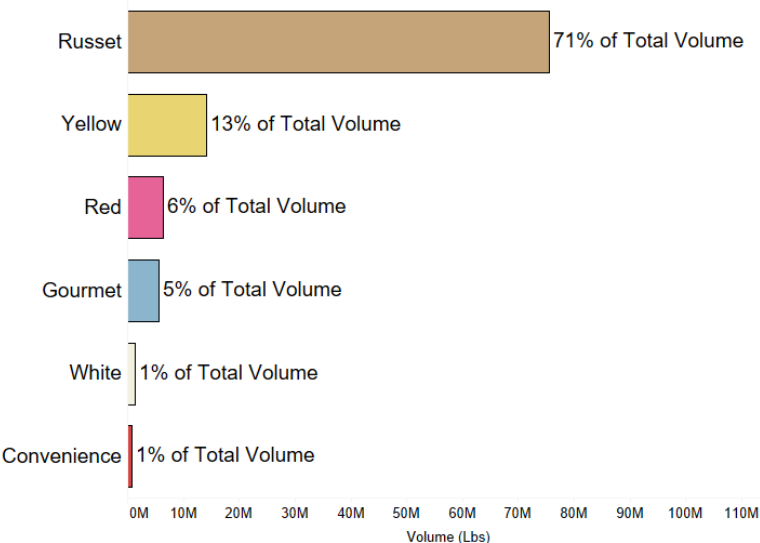
In the Mountain Division, Russet potatoes dominate the market, making up 71% of total volume. However, Russet sales saw a significant decline of 14.8% compared to Q4 last year, resulting in a loss of approximately \$6.7 million. While Yellow, Gourmet, and Convenience varieties helped slightly offset the sales deficit, they were unable to compensate for the substantial drop in Russet dollars. Overall volume in the division decreased, but this was not due to Russets, which actually posted a volume increase. Despite an increase in sales, Yellow potatoes saw a 5.2% decline in volume, suggesting rising prices in the region.

RESULTS ARE FOR DATES: 9/29/2024 THRU 12/28/2024

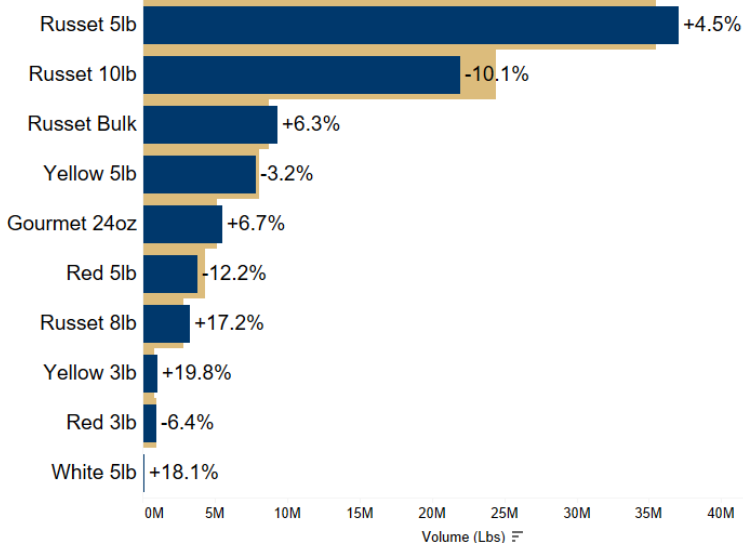
### Mountain Division Variety Breakdown

	Dollars	Dollars % Chg YoY	Dollars Chg YoY	Volume (Lbs)	Volume (Lbs) % Chg YoY	Volume Chg YoY
Russet	\$38.8M	-14.8%	-\$6.7M	75.4M	+0.3%	+0.2M
Yellow	\$13.8M	+6.0%	+\$0.8M	14.1M	-5.2%	-0.8M
Gourmet	\$13.7M	+1.7%	+\$0.2M	5.5M	+6.7%	+0.3M
Red	\$7.0M	-1.8%	-\$0.1M	6.4M	-11.6%	-0.8M
Convenience	\$1.8M	+8.8%	+\$0.1M	0.7M	+11.4%	+0.1M
White	\$1.2M	-13.8%	-\$0.2M	1.3M	+1.3%	+0.0M
<b>Grand Total</b>	<b>\$79.8M</b>	<b>-7.3%</b>	<b>-\$6.3M</b>	<b>106.4M</b>	<b>-1.1%</b>	<b>-1.2M</b>

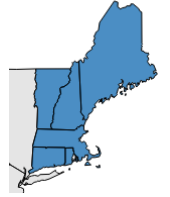
All Varieties by Volume: Mountain Division



Mountain Division: Top 10 Items for Volume



# 2024 Q4: New England Division



## White Potatoes Lost Significant Volume

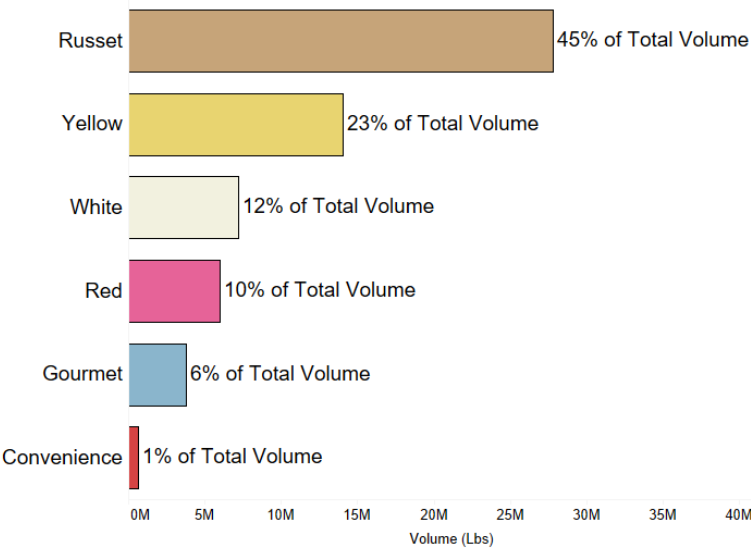
In the New England Division, Russet potatoes were the primary driver of sales declines, losing \$2.1 million year over year. Despite this, Russets are being sold in larger volumes, as seen with the Russet 5lb and Russet Bulk packs—both of which grew in volume compared to the same period last year. White potatoes, which make up 12% of the market in this region (the highest of all divisions), experienced a significant downturn, losing over \$1 million in sales and nearly as much in volume.

RESULTS ARE FOR DATES: 9/29/2024 THRU 12/28/2024

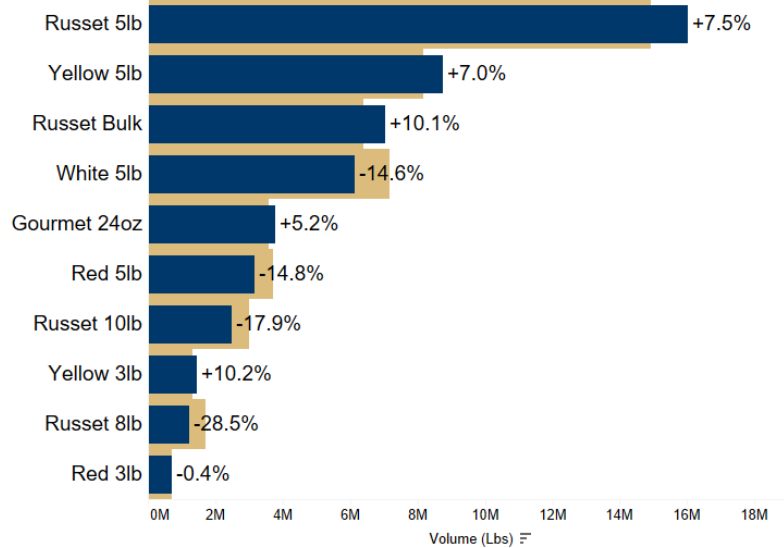
### New England Division Variety Breakdown

	Dollars	Dollars % Chg YoY	Dollars Chg YoY	Volume (Lbs)	Volume (Lbs) % Chg YoY	Volume Chg YoY
Russet	\$21.0M	-9.0%	-\$2.1M	27.8M	+4.6%	+1.2M
Yellow	\$13.5M	-1.1%	-\$0.2M	14.0M	+4.7%	+0.6M
Gourmet	\$9.7M	+5.4%	+\$0.5M	3.8M	+5.2%	+0.2M
Red	\$6.2M	-9.0%	-\$0.6M	6.0M	-11.2%	-0.8M
White	\$4.6M	-18.7%	-\$1.1M	7.2M	-11.6%	-0.9M
Convenience	\$2.0M	+3.1%	+\$0.1M	0.6M	+6.0%	+0.0M
<b>Grand Total</b>	<b>\$60.4M</b>	<b>-5.2%</b>	<b>-\$3.3M</b>	<b>61.7M</b>	<b>+0.1%</b>	<b>+0.0M</b>

All Varieties by Volume: New England Division



New England Division: Top 10 Items for Volume



Source: Idaho Potato Commission and Category Partners, powered by NielsenIQ Syndicated



# 2024 Q4: Pacific Division



## Red Potatoes Lose Volume and Sales

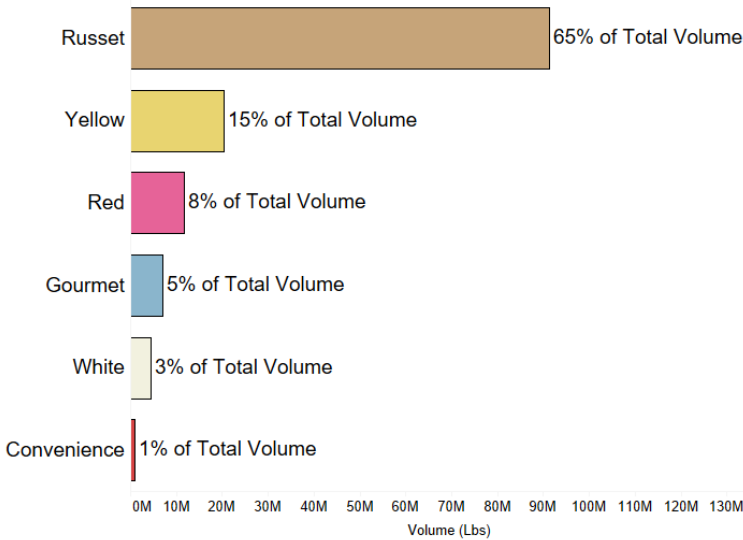
In the Pacific Division, Russet potatoes saw a decline of \$4.5 million in sales, with both the Russet 5lb and Russet 10lb packs losing volume. However, Russets still posted a slight 0.2% increase in overall volume, driven by a 4.4% gain in Russet Bulk volume and a significant 27.9% increase in the Russet 8lb pack. Red potatoes, on the other hand, were particularly affected, losing approximately \$1.7 million in sales and 1.6 million in volume compared to the same quarter last year.

RESULTS ARE FOR DATES: 9/29/2024 THRU 12/28/2024

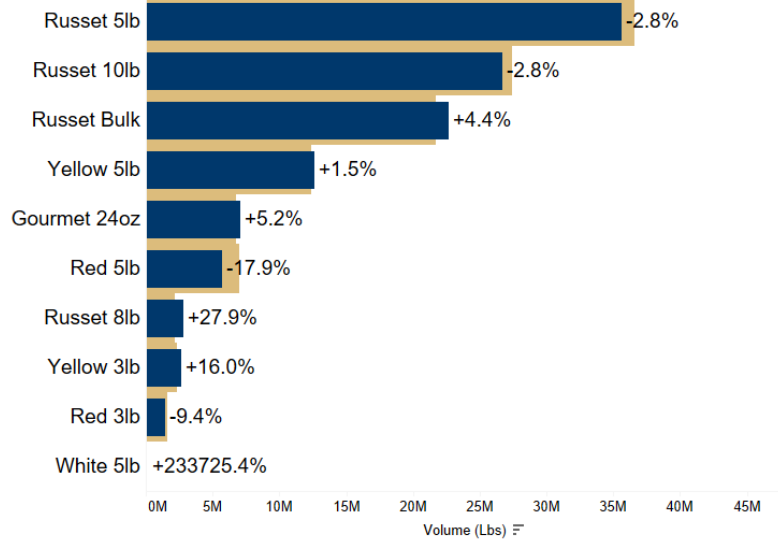
### Pacific Division Variety Breakdown

	Dollars	⌘	Dollars % Chg YoY	Dollars Chg YoY	Volume (Lbs)	Volume (Lbs) % Chg YoY	Volume Chg YoY
Russet	\$61.9M		-6.8%	-\$4.5M	91.2M	+0.2%	+0.2M
Yellow	\$24.8M		+3.0%	+\$0.7M	20.5M	+1.9%	+0.4M
Gourmet	\$18.3M		+2.1%	+\$0.4M	7.1M	+5.2%	+0.3M
Red	\$13.6M		-10.8%	-\$1.7M	11.6M	-12.3%	-1.6M
White	\$6.3M		-5.1%	-\$0.3M	4.4M	-15.4%	-0.8M
Convenience	\$3.4M		+5.1%	+\$0.2M	1.0M	+3.2%	+0.0M
<b>Grand Total</b>	<b>\$135.6M</b>		<b>-3.2%</b>	<b>-\$4.5M</b>	<b>139.2M</b>	<b>-1.1%</b>	<b>-1.6M</b>

All Varieties by Volume: Pacific Division



Pacific Division: Top 10 Items for Volume



# 2024 Q4: South Atlantic Division



## Russet Drive Top Volume Growth for South Atlantic Division

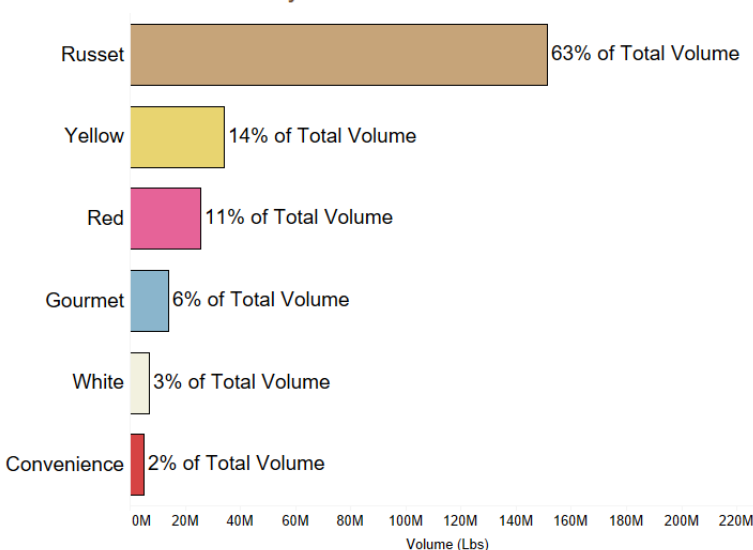
The South Atlantic Division experienced the highest volume growth among all divisions, driven by a 6.2% increase in Russet volume compared to the same period last year, which translates to an additional 8.8 million pounds. All major Russet pack sizes saw growth, with the Russet 8lb pack showing a particularly strong 33.5% increase in volume. Despite this volume growth, the division faced an overall reduction in sales, largely due to declines in the Russet and Red varieties. The Red variety was especially impacted, losing 11.7% in sales and 16.7% in volume.

RESULTS ARE FOR DATES: 9/29/2024 THRU 12/28/2024

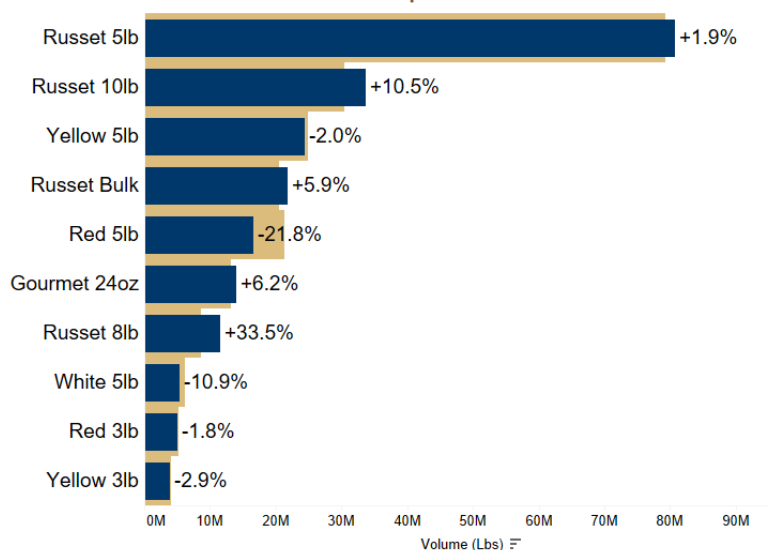
### South Atlantic Division Variety Breakdown

	Dollars	Dollars % Chg YoY	Dollars Chg YoY	Volume (Lbs)	Volume (Lbs) % Chg YoY	Volume Chg YoY
Russet	\$109.8M	-4.6%	-\$5.3M	151.1M	+6.2%	+8.8M
Yellow	\$41.9M	+3.1%	+\$1.2M	34.2M	+0.3%	+0.1M
Gourmet	\$32.9M	+5.4%	+\$1.7M	14.0M	+6.2%	+0.8M
Red	\$30.8M	-11.7%	-\$4.1M	25.5M	-16.7%	-5.1M
Convenience	\$12.3M	+0.1%	+\$0.0M	5.1M	-1.5%	-0.1M
White	\$7.8M	-13.5%	-\$1.2M	7.0M	-11.3%	-0.9M
<b>Grand Total</b>	<b>\$240.4M</b>	<b>-3.4%</b>	<b>-\$8.4M</b>	<b>240.3M</b>	<b>+1.4%</b>	<b>+3.3M</b>

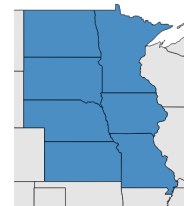
All Varieties by Volume: South Atlantic Division



South Atlantic Division: Top 10 Items for Volume



# 2024 Q4: West North Central Division



## Russets Lead Volume Growth for the Division

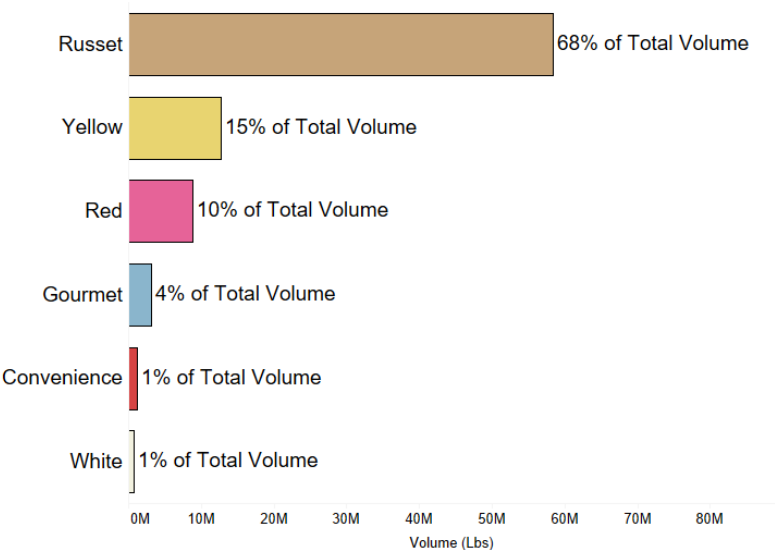
The West North Central Division saw an overall growth in volume this quarter compared to the same period last year, primarily driven by Russets and Gourmet potatoes, which together contributed an additional 4 million pounds. However, the division's volume performance could have been even stronger if not for significant declines in Red potato varieties, which lost 19.1% in volume and 4.3% in sales. On a positive note, the Russet 8lb pack posted an impressive 68.6% increase in volume, helping to boost the division's overall volume growth.

RESULTS ARE FOR DATES: 9/29/2024 THRU 12/28/2024

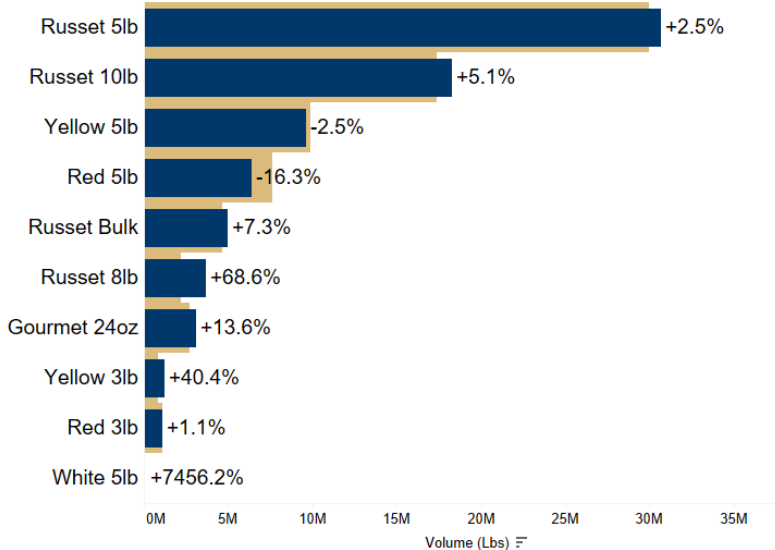
### West North Central Division Variety Breakdown

	Dollars	Dollars % Chg YoY	Dollars Chg YoY	Volume (Lbs)	Volume (Lbs) % Chg YoY	Volume Chg YoY
Russet	\$33.2M	-6.0%	-\$2.1M	58.3M	+6.5%	+3.6M
Yellow	\$12.6M	+8.0%	+\$0.9M	12.7M	-2.7%	-0.4M
Gourmet	\$8.3M	+13.0%	+\$1.0M	3.1M	+13.6%	+0.4M
Red	\$8.1M	-4.3%	-\$0.4M	8.8M	-19.1%	-2.1M
Convenience	\$2.8M	-7.0%	-\$0.2M	1.1M	-4.6%	-0.1M
White	\$0.3M	-4.9%	+\$0.0M	0.7M	+29.1%	+0.2M
<b>Grand Total</b>	<b>\$67.6M</b>	<b>-2.3%</b>	<b>-\$1.6M</b>	<b>86.1M</b>	<b>+0.8%</b>	<b>+0.7M</b>

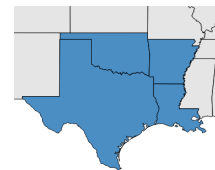
All Varieties by Volume: West North Central Division



West North Central Division: Top 10 Items for Volume



# 2024 Q4: West South Central Division



## Division Lost Momentum this Quarter

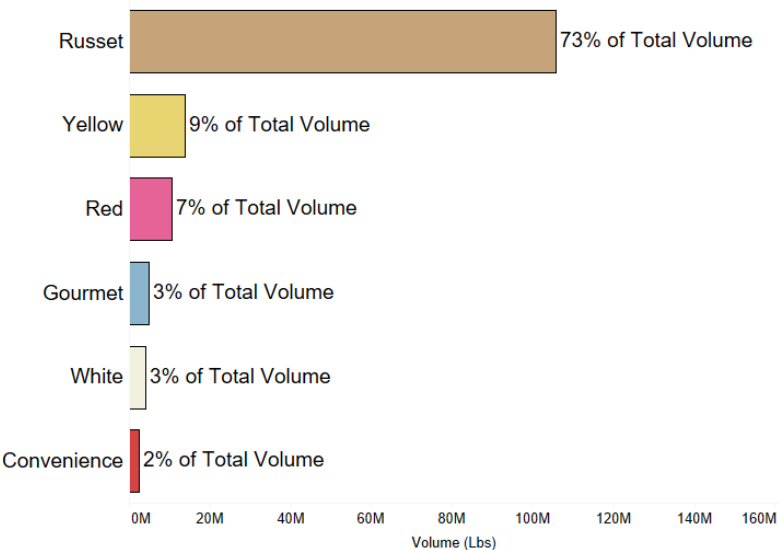
The West South Central Division was the worst performer this quarter, experiencing a significant loss of \$9.9 million in sales and 9.1 million pounds in volume. Many of the top pack sizes saw declines in volume, with the exception of the Russet 8lb pack, which posted a 9.8% increase in volume. This suggests that while overall performance was weak, the Russet 8lb variety provided some positive momentum within the division.

RESULTS ARE FOR DATES: 9/29/2024 THRU 12/28/2024

### West South Central Division Variety Breakdown

	Dollars	Dollars % Chg YoY	Dollars Chg YoY	Volume (Lbs)	Volume (Lbs) % Chg YoY	Volume Chg YoY
Russet	\$57.3M	-13.2%	-\$8.7M	105.6M	-2.8%	-3.0M
Yellow	\$15.2M	+4.7%	+\$0.7M	13.8M	-13.3%	-2.1M
Gourmet	\$12.1M	+2.8%	+\$0.3M	4.8M	+7.4%	+0.3M
Red	\$12.0M	-4.3%	-\$0.5M	10.5M	-22.5%	-3.0M
White	\$5.5M	-3.5%	-\$0.2M	4.0M	-9.0%	-0.4M
Convenience	\$4.5M	-10.4%	-\$0.5M	2.4M	-13.7%	-0.4M
<b>Grand Total</b>	<b>\$112.4M</b>	<b>-8.1%</b>	<b>-\$9.9M</b>	<b>145.1M</b>	<b>-5.9%</b>	<b>-9.1M</b>

All Varieties by Volume: West South Central Division



West South Central Division: Top 10 Items for Volume

