

FRESH FY19 POTATO REPORT

(7/1/2018-6/30/2019)

NATIONAL FRESH POTATO RETAIL PERFORMANCE



Includes UPC and Non-UPC Fresh Potatoes*

| National Fresh Potato Sales | FY19 | FY18 | Actual Change | % Change |
|-----------------------------|-----------------|-----------------|---------------|----------|
| Dollars | \$2,862,253,469 | \$2,824,418,825 | \$37,834,645 | 1.3% |
| Pounds | 3,968,484,071 | 4,104,746,869 | -136,262,798 | -3.3% |
| Price per Pound | \$0.72 | \$0.69 | \$0.03 | 4.8% |

PERFORMANCE BY POTATO TYPE

| National Fresh Potato Sales | Dollars | Dollars % Change | Pounds | Pounds % Change | Volume Share | Price per Pound | Price per Pound % Chg |
|-----------------------------|-----------------|------------------|---------------|-----------------|--------------|-----------------|-----------------------|
| Russet | \$1,475,029,629 | -0.0% | 2,571,271,332 | -6.0% | 64.8% | \$0.57 | 6.4% |
| Red | \$592,915,614 | -3.3% | 631,722,896 | -4.2% | 15.9% | \$0.94 | 0.9% |
| Yellow | \$459,797,181 | 9.0% | 442,021,688 | 4.4% | 11.1% | \$1.04 | 4.4% |
| White | \$170,420,923 | 5.5% | 234,656,758 | 8.6% | 5.9% | \$0.73 | -2.8% |
| Medley | \$84,101,796 | 14.8% | 40,873,091 | 14.2% | 1.0% | \$2.06 | 0.5% |
| Fingerling | \$21,804,012 | 2.7% | 9,651,099 | 5.8% | 0.2% | \$2.26 | -2.9% |
| Purple/Blue | \$5,643,253 | -5.5% | 2,583,410 | -5.1% | 0.1% | \$2.18 | -0.4% |
| All Other | \$52,268,959 | 0.4% | 35,630,183 | 64.3% | 0.9% | \$1.47 | -38.9% |

PERFORMANCE BY PACKAGE SIZE

| National Fresh Potato Sales | Dollars | Dollars % Change | Pounds | Pounds % Change | Volume Share | Price per Pound | Price per Pound % Chg |
|-----------------------------|-----------------|------------------|---------------|-----------------|--------------|-----------------|-----------------------|
| 1 - 4 lbs. | \$651,583,986 | 4.2% | 395,395,830 | 0.2% | 9.7% | \$1.65 | 4.0% |
| 5 lbs. | \$1,138,734,166 | 3.4% | 1,871,757,294 | -0.4% | 45.7% | \$0.61 | 3.8% |
| 8 lbs. | \$107,445,368 | 4.0% | 201,652,401 | -1.6% | 4.9% | \$0.53 | 5.6% |
| 10 lbs. | \$337,901,015 | -5.0% | 830,029,919 | -12.2% | 20.3% | \$0.41 | 8.1% |
| > 10 lbs. | \$49,089,242 | 6.6% | 133,441,832 | 6.8% | 3.3% | \$0.37 | -0.2% |
| All Other Sizes | \$102,676,118 | 1.6% | 158,244,892 | 5.4% | 3.9% | \$0.65 | -3.5% |
| Bulk | \$518,158,092 | -2.22% | 504,885,088 | -1.9% | 12.3% | \$1.03 | -0.3% |

*Totals vary slightly based on IRI/Retailer categorizations *Micro/Steamer, Tray, and Multi Wrapped Included in equivalent weight classes

PERFORMANCE BY PACKAGE TYPES

*All Other Packaging consists of: Box, Can, Clamshell, Plastic Container, Window Box

| National Fresh Potato Sales | Dollars | Dollars % Change | Pounds | Pounds % Change | Volume Share | Price per Pound | Price per Pound % Chg |
|-----------------------------|-----------------|------------------|---------------|-----------------|--------------|-----------------|-----------------------|
| Bag | \$2,151,052,863 | 3.0% | 3,370,603,244 | -3.0% | 85.1% | \$0.64 | 6.2% |
| Bulk | \$518,158,092 | -2.2% | 504,885,088 | -1.9% | 12.7% | \$1.03 | -0.3% |
| Single Wrapped | \$40,165,932 | -14.2% | 19,896,627 | -34.4% | 0.5% | \$2.02 | 30.8% |
| Micro/Steamer | \$48,604,715 | -9.9% | 17,100,651 | -14.5% | 0.4% | \$2.84 | 5.3% |
| Tray | \$36,300,453 | 2.1% | 17,245,997 | 2.6% | 0.4% | \$2.10 | -0.5% |
| Multi-Wrapped | \$3,981,595 | 133.8% | 2,242,497 | 113.4% | 0.1% | \$1.78 | 9.5% |
| All Other Pkg | \$58,549,729 | -3.8% | 30,108,645 | -1.4% | 0.8% | \$1.94 | -2.4% |

*Totals vary slightly based on IRI/Retailer categorizations

Please contact retail@potatoesusa.com with any questions

Source: IRI Freshlook & POS 6/30/19 *EXCLUDES all sweet potatoes *All pounds are fresh weight equivalent

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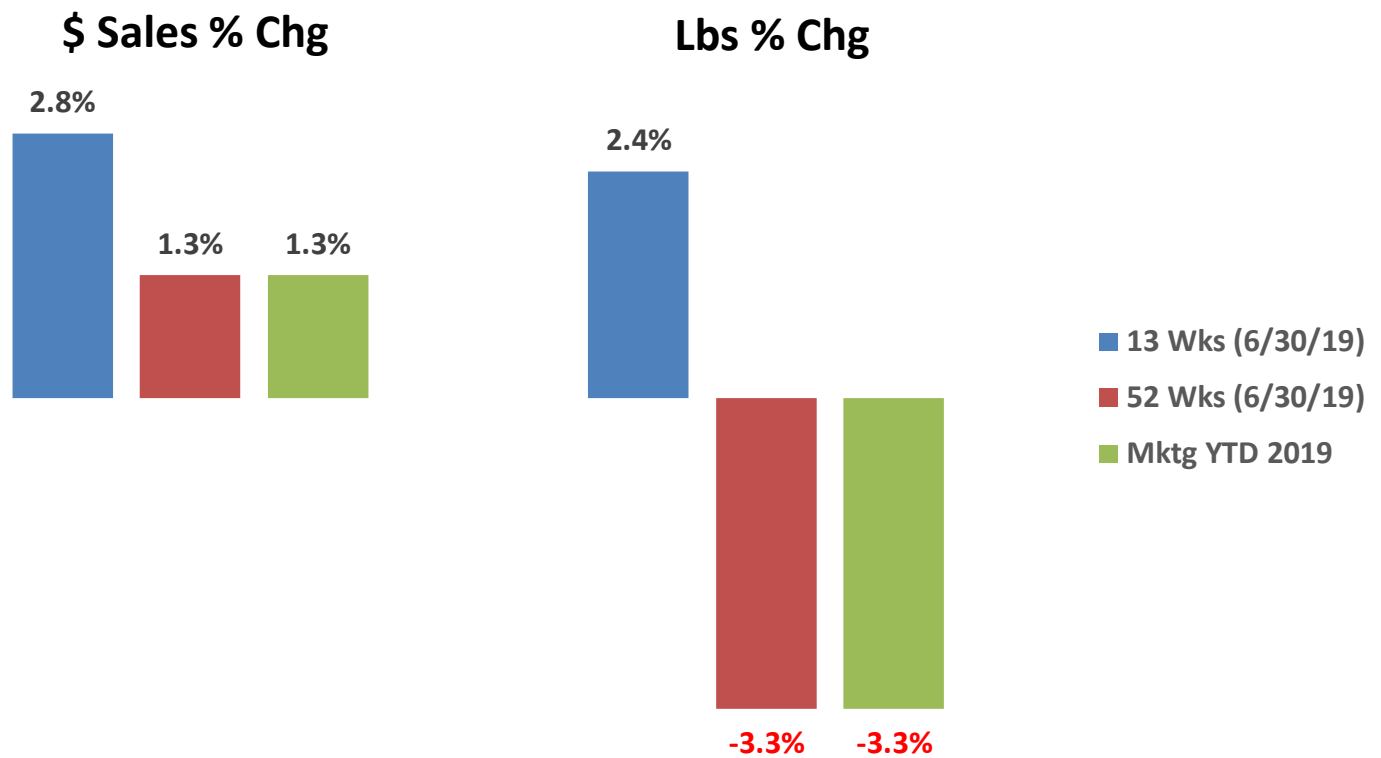
(7/1/2018-6/30/2019)



PERFORMANCE BY ORGANIC VS CONVENTIONAL – 52 Weeks

| Organic vs. Conventional | Dollars | Dollars % Change | Pounds | Pounds % Change | Volume Share | Price per Pound | Price per Pound % Chg |
|--------------------------|-----------------|------------------|---------------|-----------------|--------------|-----------------|-----------------------|
| Organic | \$2,736,271,109 | 1.3% | 3,876,546,853 | -3.2% | 97.8% | \$0.71 | 4.6% |
| Conventional | \$121,138,784 | 5.8% | 86,137,782 | 1.5% | 2.2% | \$1.41 | 4.3% |

FRESH POTATOES RETAIL PERFORMANCE – 52 Weeks



PERFORMANCE TRENDS VS YAGO

- **Fresh Potato** dollars increased while pounds decreased compared to YA (+1.3%, -3.3%)
- **Russets and reds** are responsible for the majority of the volume decline of Fresh Potatoes (-6.0%, -4.2%)
- **Yellows, whites, and medleys** increased in volume vs YA (+4.4%, +8.6%, +14.2%)
- **1-4 lbs & >10 lbs** were responsible for the biggest increase in volume vs YA (+0.2%, +6.8%)
- **5 lb, 8 lb, 10 lb, and Bulk** declined in volume sales vs YA (-0.4%, -1.6%, -12.2%, -1.9%)
- **Price per pound** increased across all pack sizes vs YA (+4.8%)

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