

TOTAL STORE QUARTERLY POTATO REPORT

Quarter 4 – Data Ending 7.01.17

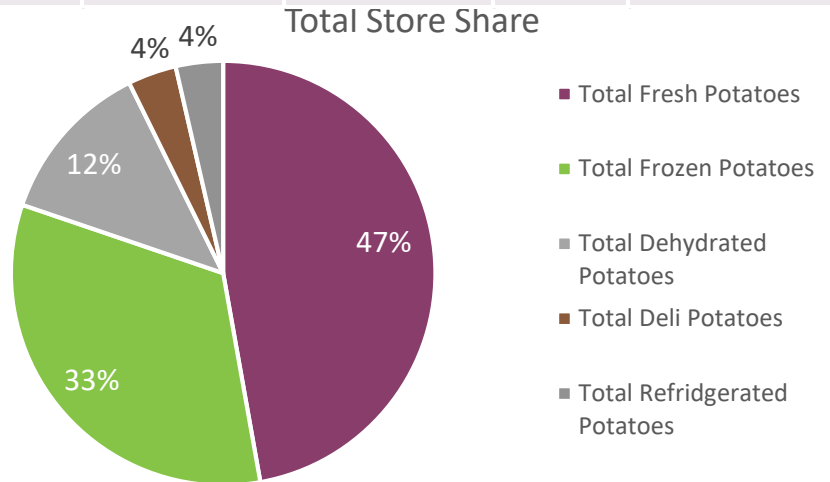


NATIONAL TOTAL POTATO RETAIL PERFORMANCE

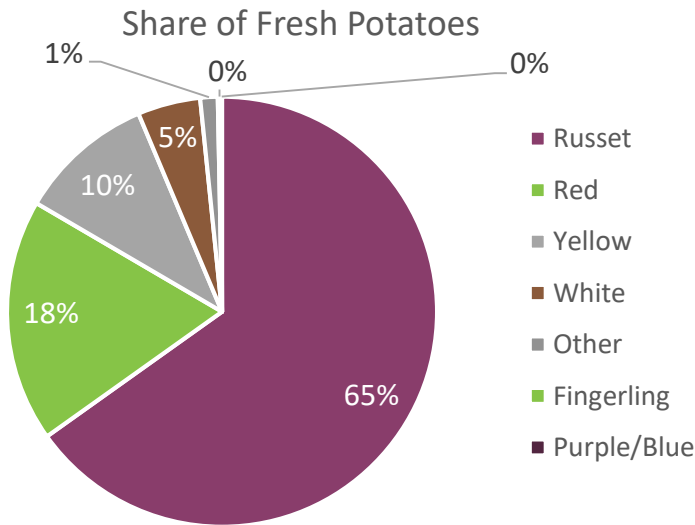
National Total Store Potato Sales	Dollars	Dollars % Change vs YAGO	Pounds	Pounds % Change vs YAGO	Price Per Pound	Price Per Pound % Change vs YAGO
FY 2017 - Q1	\$1,213,007,903	2.4%	1,049,596,495	-1.0%	\$1.16	3.4%
FY 2017 - Q2	\$1,318,326,524	2.4%	1,263,196,097	-0.3%	\$1.04	2.7%
FY 2017 - Q3	\$1,249,652,376	-0.1%	1,140,243,787	-3.4%	\$1.10	3.4%
FY 2017 - Q4	\$1,240,586,870	3.1%	1,085,264,500	1.8%	\$1.14	1.2%

Total Store Potatoes Includes:

- Fresh Potatoes (UPC and Non-UPC)
- Frozen Potatoes
- Dehydrated Potatoes
- Deli Potatoes
- Refrigerated Potatoes



TOTAL FRESH PERFORMANCE



KEY TAKEAWAYS

- Total Fresh Potato dollars and volume are performing well this quarter with an increase in dollars, volume, and price
- Russet Potatoes are promoting more (+13%) but are not seeing a decline in distribution points or the amount of items per store – the increase in promotions are influencing dollar and volume trends
- Promotional activity is up for Overall Fresh Potatoes, which is likely a key contributor to the increases in sales

Fresh Potatoes Q4	Dollars	Dollars % Change vs YAGO	Pounds	Pounds % Change vs YAGO	Price Per Pound	Price Per Pound % Change vs YAGO
Total Fresh Potatoes	\$481,566,245	2.7%	690,222,483	1.6%	\$0.70	1.0%
Russet	\$245,251,809	-1.6%	449,683,624	0.6%	\$0.55	-2.2%
Other	\$20,528,187	62.0%	9,069,705	40.2%	\$2.26	15.5%
Purple/Blue	\$720,974	-6.1%	347,740	3.4%	\$2.07	-9.1%
White	\$24,372,054	-5.3%	32,592,541	-9.5%	\$0.75	4.7%
Fingerling	\$3,948,415	4.8%	1,830,999	7.4%	\$2.16	-2.4%
Yellow	\$71,607,385	13.8%	70,564,676	14.9%	\$1.01	-1.0%
Red	\$115,137,420	0.9%	126,133,197	-0.2%	\$0.91	1.1%

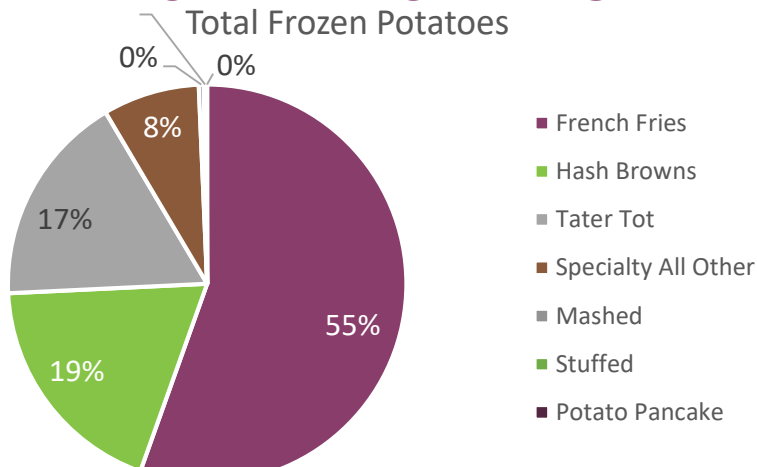
Source: Nielsen Perishables Group FreshFacts® (Fresh, deli and refrigerated)
 Source: Nielsen xAOC (frozen and dehydrated) *EXCLUDES all sweet potatoes

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TOTAL FROZEN PERFORMANCE

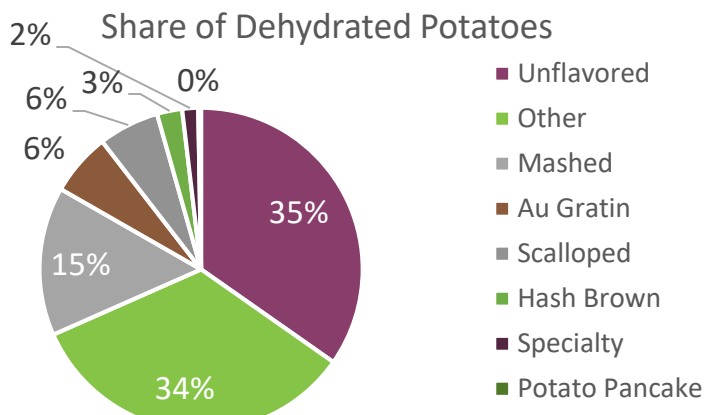


KEY TAKEAWAYS

- Frozen Potatoes are slightly increasing in dollars and volume with a slight increase in price per pound
- Stuffed Potatoes are down in dollars and pounds with a slight decrease in pricing. These trends are being influenced by a 40% decline in promotional dollars vs YAGO
- Frozen Mashed Potatoes are seeing the highest growth in both dollars and pounds. This strong growth is likely being influenced by a 24% increase in average number of items on shelf

Frozen Potatoes Q4	Dollars	Dollars % Change vs YAGO	Pounds	Fresh Weight Equivalent	Pounds % Change vs YAGO	Price Per Pound	Price Per Pound % Change vs YAGO
Total Frozen Potatoes	\$384,990,529	1.9%	284,137,485	483,033,725	1.0%	\$1.35	0.8%
French Fries	\$207,131,757	-1.0%	157,554,673	267,842,944	-1.4%	\$1.32	0.5%
Hash Browns	\$72,604,608	8.7%	53,390,273	90,763,464	9.8%	\$1.36	-1.0%
Mashed	\$2,553,538	35.1%	1,147,096	1,950,062	26.8%	\$2.23	6.6%
Potato Pancake	\$781,325	-7.1%	135,708	230,704	-7.0%	\$5.76	-0.1%
Specialty All Other	\$39,286,574	2.3%	22,284,562	37,883,756	-5.6%	\$1.76	8.3%
Stuffed	\$1,999,168	-26.6%	627,179	1,066,204	-25.7%	\$3.19	-1.2%
Tater Tot	\$60,633,559	4.6%	48,997,995	83,296,591	3.7%	\$1.24	0.8%

TOTAL DEHYDRATED PERFORMANCE



KEY TAKEAWAYS

- Total Dehydrated Potatoes are increasing in both dollars and pounds with no increase in price.
- Promotional dollars have increased across nearly all types of Dehydrated Potatoes except for Potato Pancakes
- Total Distribution points are stagnant (-0.3%) for Dehydrated Potatoes with the largest loss of distribution coming from Specialty and Potato Pancakes

Dehydrated Potatoes Q4	Dollars	Dollars % Change vs YAGO	Pounds	Fresh Weight Equivalent	Pounds % Change vs YAGO	Price Per Pound	Price Per Pound % Change vs YAGO
Total Dehydrated Potatoes	\$103,517,731	2.1%	30,417,316	182,503,898	2.3%	\$3.40	0.0%
Au Gratin	\$7,978,078	4.2%	1,901,828	11,410,970	8.1%	\$4.20	-3.7%
Hash Brown	\$3,032,900	13.1%	764,616	4,587,697	28.7%	\$3.97	-12.1%
Mashed	\$18,555,425	2.3%	4,529,479	27,176,875	2.7%	\$4.10	-0.3%
Other	\$42,054,840	6.8%	10,236,898	61,421,387	9.5%	\$4.11	-2.5%
Potato Pancake	\$530,121	-16.0%	85,468	512,808	-19.6%	\$6.20	4.5%
Scalloped	\$7,764,225	6.7%	1,849,727	11,098,360	10.5%	\$4.20	-3.5%
Specialty	\$2,012,815	-10.1%	485,985	2,915,911	-5.0%	\$4.14	-5.3%
Unflavored	\$21,589,326	-7.8%	10,563,315	63,379,890	-6.8%	\$2.04	-1.0%

Source: Nielsen Perishables Group FreshFacts® (Fresh, deli and refrigerated)

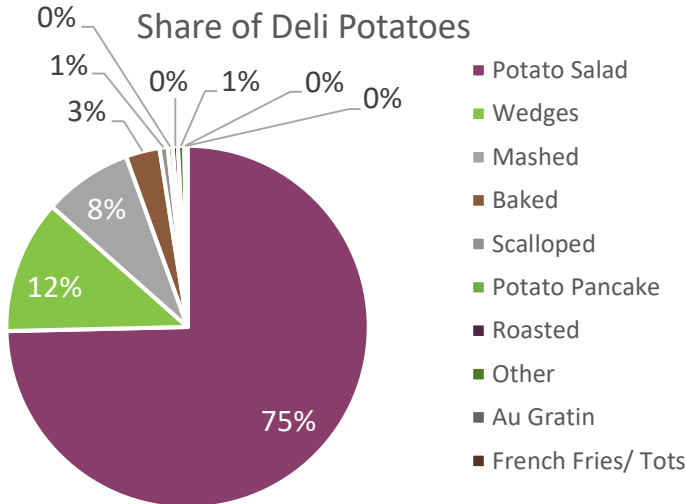
Source: Nielsen xAOC (frozen and dehydrated)

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TOTAL DELI PERFORMANCE



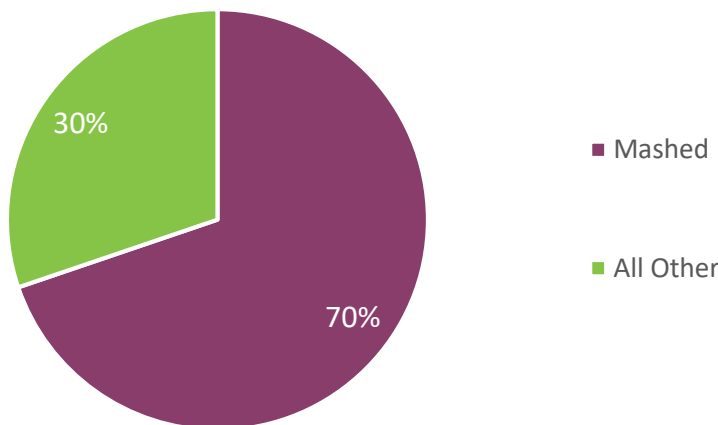
KEY TAKEAWAYS

- Deli Potatoes is seeing a continued increase in dollars and pounds compared to YAGO
- Potato Pancakes, Au Gratin, and French Fries/ Tots have seen decreases in average number of items per store per week versus YAGO. Sales have declined due to this change in assortment

Deli Potatoes Q4	Dollars	Dollars % Change vs YAGO	Pounds	Pounds % Change vs YAGO	Price Per Pound	Price Per Pound % Change vs YAGO
Total Deli Potatoes	\$191,517,773	4.0%	54,176,129	3.6%	\$3.54	0.5%
Potato Salad	\$144,811,721	4.2%	40,434,231	3.7%	\$3.58	0.4%
Wedges	\$21,102,570	2.9%	6,457,456	-0.2%	\$3.27	3.1%
Mashed	\$14,818,116	5.3%	4,299,341	4.2%	\$3.45	1.1%
Baked	\$4,923,984	9.3%	1,641,611	26.2%	\$3.00	-13.4%
Scalloped	\$2,359,416	12.9%	394,104	0.5%	\$5.99	12.3%
Roasted	\$1,128,638	-0.8%	252,727	-0.2%	\$4.47	-0.6%
Other	\$1,158,304	13.6%	307,325	24.1%	\$3.77	-8.5%
Au Gratin	\$307,308	-49.8%	66,108	-55.0%	\$4.65	11.6%
Potato Pancake	\$663,720	-5.6%	235,554	-8.4%	\$2.82	3.1%
French Fries/ Tots	\$243,996	-36.9%	87,671	-32.8%	\$2.78	-6.1%

TOTAL REFRIGERATED PERFORMANCE

Share of Refrigerated Potatoes



KEY TAKEAWAYS

- Refrigerated Potatoes are performing well with a strong increase in dollars and pounds
- Mashed Potatoes account for most of the share of Refrigerated Potatoes. Promotional Dollars are up 20% vs YAGO
- Casserole, Diced, Scalloped, and Mashed are being strongly promoted within All Other. This increase in promotional activity is likely influencing the growth within the Category.

Refridgerated Potatoes Q4	Dollars	Dollars % Change vs YAGO	Pounds	Fresh Weight Equivalent	Pounds % Change vs YAGO	Price Per Pound	Price Per Pound % Change vs YAGO
Total Refridgerated Potatoes	\$78,994,592	10.7%	26,311,087	52,622,174	12.2%	\$3.00	-1.3%
Mashed	\$58,060,483	10.0%	18,361,798	36,723,595	11.8%	\$3.16	-1.6%
All Other	\$20,934,109	12.7%	7,949,289	15,898,578	13.1%	\$2.63	-0.4%

Source: Nielsen Perishables Group FreshFacts® (Fresh, deli and refrigerated)

Source: Nielsen xAOC (frozen and dehydrated)