

MARKETING YEAR
2019-2020*

FOODSERVICE VOLUMETRIC REPORT

Potatoes
USA

HIGHLIGHTS



DRAMATIC CHANGES IN THE FOODSERVICE CATEGORY, INCLUDING POTATOES.

10.7

**BILLION POUNDS SOLD IN
FOODSERVICE IN MY20**

COMPARED TO \$12.4 BILLION POUNDS IN MY19

**POTATOES PERFORMED BETTER
THAN THE TOTAL FOODSERVICE SECTOR**



POTATOES

-13.3%



FOODSERVICE

-14.8%



LIMITED SERVICE RESTAURANTS

(LSRs) (FAST CASUAL, QUICK SERVICE RESTAURANT)

LEAST IMPACTED BY THE PANDEMIC

46%

Foodservice Potato Volume

* **BEST PERFORMER:** Frozen potatoes are experiencing the **lowest rate of decline** among all potato forms in foodservice due to this better-performing sector.



**OF POTATOES
USED AT FOODSERVICE
BY FORM**

Frozen: 62%

Refrigerated: 3%

Dehy: 2%

Fresh: 30%

Chips: 3%

KEY FINDINGS



FROZEN

6.65

MILLION POUNDS SOLD
-745M lbs from MY19

% OF FROZEN POTATOES SOLD BY FORM:

Fries	81%	Loose Hash Browns	2%
Tots/Shapes	5%	Other Frozen	4%
Formed Hash Browns	5%	Other Frozen Breakfast	2%

-63%

Despite fries seeing the largest decrease in volume, they are overperforming compared to other potato formats.

FROZEN POTATO VOLUME DECLINE

-23% Beyond Restaurants (C&U, K-12, B&I)	-4% Limited-Service Restaurants
-17% Full-Service Restaurants	



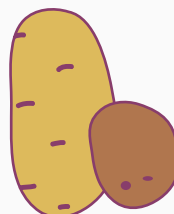
FRESH

3.24

MILLION POUNDS SOLD
-47M lbs from MY19

% OF FRESH POTATOES SOLD BY FORM:

Roasted	26%
Mashed	22%
Baked	20%
Other Sides	20%
Other Entrées	12%



FRESH POTATO VOLUME DECLINE

-22% Full-Service Restaurants	-13% Limited-Service Restaurants
-19% Beyond Restaurants (C&U, K-12, B&I)	



KEY FINDINGS (continued)



REFRIGERATED

REFRIGERATED
POTATOES
FOODSERVICE
SALES

326
MILLION POUNDS

-53M lbs from MY19

REFRIGERATED POTATOES VOLUME DECLINE

-15% Full-Service Restaurants **-14%** Travel and Leisure



CHIPS



327
MILLION POUNDS
CHIPS SOLD
-47M lbs from MY19

A consumer shift toward prepackaged, grab-and-go products helped this category.

POTATO CHIP VOLUME DECLINE

-18% Full-Service Restaurants **-9%** Limited-Service Restaurants
-14% Beyond Restaurants (C&U, K-12, B&I)



DEHYDRATED



184 MILLION
POUNDS
SOLD

-31M lbs from MY19



DEHYDRATED POTATOES VOLUME DECLINE

-22% Loose dehydrated hash browns declined due to drop in foodservice breakfast sales.

-24% Full-Service **-22%** Travel and Leisure **-21%** Business and Industry

METHODOLOGY

- The objective of this study is to measure the potato volume data for both fresh and processed potatoes during marketing year July 2019–June 2020 in the United States foodservice marketplace.
- A structured survey of foodservice operators was conducted to gather potato volume usage. Channel interviews were also conducted with 15 broadline foodservice distributors as well as processed potato suppliers active in the foodservice business to confirm and validate market findings.
- This study was conducted by Technomic, Inc., in September 2020 to reflect potato usage for MY18, MY19, and MY20 (period ending June 30, 2020).