

Country/Region	In-Store		Online		Promotions		Retail Shopping Trends		U.S. Potato Sales		Additional Comments
	Mark Yes or No in the change column and describe any increases, decreases, or changes for each category in the details column.										
	Change	Details	Change	Details	Change	Details	Allowed	Details	Change	Details	Details
Central America	Yes	Shelf stable canned goods are prioritized with placement within the store. Clothing and hardware stores are even carrying canned goods to meet the demand in the market.	Yes	Online sales are increasing in this market for mostly perishable goods. However, infrastructure is impacting the wide spread use.	Yes	Some countries have started in-store promotions for sampling and others have not. It varies based on the capabilities of the market.	Yes	Air fryers and healthy eating are growing in popularity in this market.	Yes	Lack of availability is impacting fresh potato sales at retail. U.S. frozen potatoes are strong due to supply and the increased use of the air fryer.	
China	No	The continued growth of both in-store and online cohesion has helped retailers increase sales throughout 2020 and into 2021.	Yes	A simplification of the online retail experience is being driven by industry leaders such as Alibaba.	Yes	In-store and online promotions are being executed with a sterilization certification. All food is being sold and sampled with a sterilization guarantee.	No	A combined omnichannel experience is increasing in demand from consumers.	Yes	Sales are down due to increased consumer concern over the safety of imported products. The decline in sales seems largely related to supply in the market.	Streamlined distribution and "Community Commerce" are both strong trends growing in this market. Both refer to a 'direct to consumer from manufacturer' relationship.
Japan	No	In-store shopping has returned to pre-pandemic regulations. Retail sales remain high as more consumers are still cooking at home.	No	While some retailers showed an initial shift towards online, the pandemic remained mostly contained in Japan and online did not grow in this market as much as others.	No	In-store sampling is still on hold.	No	Masks are still being worn consistently and consumers remain cautious.	Yes	U.S. frozen fry sales have increased and retailers have brought tater drums and additional U.S. frozen SKUs to address the demand.	
Malaysia	Yes	Retailers are opening smaller format stores to reach consumers outside of the major cities.	Yes	Online sales are increasing, but not as significantly as they were in 2020. Consumers are impressed with the retailers ability to deliver frozen goods and still have them frozen.	Yes	Promotions are starting again. People sampling any product are required to show proof of a negative test before sampling, or once every two weeks.	No	Nothing is changing outside of the growth with online.	Yes	U.S. frozen potato sales are increasing still both in-store and online. Fresh and dehydrated potatoes are holding strong, but not showing the same increase as frozen.	Social media has become an important sector in retailer sales. Consumers are turning towards retailers' social accounts for inspiration in their home kitchens.
Mexico	Yes	In-store sales overall are down due to the restrictions on when and who can be in-store.	Yes	Retailers, such as Walmart, transitioned easily towards an online format with increased sales. Other retailers did transition towards online, but also added a call in option so consumers can order and pickup their groceries curbside.	No	Some retailers are still allowing in-store sampling and others are not. No products are allowed to be sampled, but information about the products can still be handed out.	Yes	Retailers are focusing on smaller concept, lower cost products and opening stores to represent this changing market. Walmart transitioned several Superama stores to Walmart Express.	Yes	Sales have increased for U.S. fresh, frozen, and dehydrated potatoes. The largest growth was seen on instant mashed potatoes.	Baggers are no longer allowed to bag groceries and contactless pay is increasing in this market.
Myanmar (Burma)	Yes	Hours are shortened due to the coup and a curfew was set for citizens. Stores are currently only open until 5:30 PM.	Yes	The internet is restricted from 1:00 AM to 9:00 AM every day to prevent civil disobedience.	Yes	Promotions were expected to continue at the beginning of February, but have been restricted due to the coup.	Yes	Food bloggers are growing in popularity in this market.	Yes	U.S. frozen potato sales are increasing in this market. Malaysian frozen potatoes are a growing presence in this market though.	Myanmar is being significantly impacted by the coup. U.S. is seen as an ally and U.S. products are performing very well due to the nature of the this opinion.
Philippines	Yes	Merchandisers are being used to restock the shelves and more and more people are restricted to home.	No	Some retailers are growing their presence online, but the majority do not have the capabilities to function in this space.	No	In-store promotions remain on hold. Give-aways and bundling promotions are still allowed as long as there is no face to face contact.	Yes	Hotels are currently selling their food supplies as grocery items to meet the demand for increased retail space in this market.	Yes	Sales are strong when product is available in the market. The imported shipment sold through for both fresh and frozen more quickly than retailers anticipated.	With mass transit shut down, many people in this market have no way to get to work. This is causing a significant disruption in their supply chain.
South Korea	No	There are no changes to the hours or in-store shopping recently.	No	There are no changes to the hours or in-store shopping recently.	Yes	In-store sampling is limited to prepackaged samples and point of sale materials for education purposes. Some retailers are allowing this.	No		Yes	The growth of air fryers in this market has significantly increased the sales of U.S. frozen potatoes.	

Taiwan	No	Cases remain low and encouragement to wear a mask and use hand sanitizer remain the only changes.	No	Since the pandemic did not disturb as much of this market as others, resources were directed towards supply chain improvements as opposed to online.	No	In-store or online promotions are still not taking place.	Yes	In-store shopping times have decreased similar to here in the U.S.	Yes	Sales of U.S. potatoes are being impacted due to supply in this market.	Rapid growth in home delivery services and ready to eat meals is driving sales higher in some sectors.
Thailand	Yes	Smaller format stores are increasing with retailers such as 7Eleven opening stores catered towards the more populated areas.	Yes	Some retailers are moving towards delivery towards consumers within walking proximity. Employees are walking goods ordered online to consumers homes.	Yes	Promotions are being ran in conjunction with the government due to the loss in income for Thailand's citizens. Consumers on the "Pao Tung" app can split some of their food costs with the local government.	Yes	Retailers are focused on opening far fewer retail locations. The locations that are planned to open are much smaller.	Yes	With more at home cooking, retail sales for U.S. potatoes are increasing in this market.	
Vietnam	No	Consumers are still expected to wear masks and have their temperature taken upon entry.	Yes	Retailer apps were the most downloaded apps in 2020 with large sales increases for all products in this sector. Online orders are free for consumers if they live within three miles of the store.	Yes	Some retailers are now allowing in-store promotions.	Yes	The pandemic is starting to impact the people in this market more driving more consumers to at home cooking.	Yes	Sales have increased for U.S. fresh, frozen, and dehydrated potatoes. However, sales for in-store shopping still remain higher in this market.	