Regional Performance Series

California

FY 2025 Performance and Merchandising Review

Potatoes are a reliable, year-round produce department powerhouse, purchased by 85% of U.S. households. In retail dollars, potatoes are the fifth-largest seller in the produce department and the second-largest vegetable behind tomatoes. By retail volume, potatoes are the second-largest commodity in total produce and the top vegetable overall. Deflationary conditions in fiscal year 2025 have driven pound growth and renewed engagement with larger bag sizes. Growers and retailers can find shared success by leveraging potatoes' broad household penetration to drive growth. **If half of all current potato-buying households made just one additional purchase per year, this could result in an incremental 240 million pounds sold nationwide.**

The regional report series examines performance and sales in each of the eight Circana regions to help understand trends in engagement, varieties, organic growth, and more. The timeframe of this report looks at a fiscal year (FY) from July 2024 to June 2025

Top findings — California

- California represents 9.1% of the nation's potato sales — under indexing vs. total produce and vegetables.
- FY 2025 marked the second-highest dollar and volume sales in California, falling only short of 2020.
- Pounds grew 4.8% year-over-year, far more than the nation's average of 2.1%.
- Deflation affected dollar sales but boosted volume sales, affecting Russets the most.
- Consumers switched to larger pack sizes, in particular eight- and 10-pound bags.

California Unit Shares

California alone generates more than 9% of total U.S. food and beverage unit sales in FY 2025. Fresh departments play a more prominent role in the state, particularly in fresh produce. In fiscal year 2025, both total produce and vegetables account for 11.5% of the nation's unit sales, compared with 9.1% of all fresh potato unit sales 9.3% of total food and beverages.

- 10.0% of total fresh departments
- 11.5% of total fresh produce
- 11.5% of total fresh vegetables
- 9.1% of total fresh potatoes

Source: Circana, Integrated Fresh, California region as a share of total U.S., MULO+, 52 w.e. 7/13/2025 (FY 2025)
Units remove the impact of different inflation levels across categories and are the best measure for comparison across departments.

FY 2025 Sales Performance

Vegetables posted mild growth in fiscal year 2025. Unit and volume sales increased modestly, while dollar sales declined due to deflationary conditions. In California, vegetable sales underperformed, with dollars, units, and volume tracking flat to down. Potatoes followed a markedly different path, delivering robust year-over-year gains in units and volume nationwide, as well as even stronger performance within the state. Potato pound sales rose 4.8% versus year-ago levels in California.

Total U.S. vs. California	$ Sales	$ vs. YA	Unit sales	Units vs. YA	Volume sales	Pounds vs. YA
U.S. vegetables	$45.3B	+0.6%	18.6B	+1.1%	22.5B	+1.6%
California Vegetables	**$5.4B**	**-0.1%**	**2.1B**	**-0.3%**	**2.5B**	**-0.1%**
U.S. potatoes	$4.3B	-3.2%	1.2B	+2.3%	4.8B	+2.1%
California potatoes	**$407M**	**-0.1%**	**108M**	**+2.2%**	**432M**	**+4.8%**

Source: Circana, Integrated Fresh, Total U.S. and California region, MULO+, 52 w.e. 7/13/2025 (FY 2025)

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Five-Year Potato Performance Review

The 2025 fiscal year was the best of the past five years in terms of volume sales. California also recorded its highest volume sales on record. Dollar sales peaked in 2023 due to high inflation.

Total U.S. vs. California	Volume Sales Total U.S.	Volume Sales California	$ Sales Total U.S.	$ Sales California
FY 2021	4.74B	415M	$3.62B	$341M
FY 2022	4.61B	410M	$3.81B	$360M
FY 2023	4.54B	407M	$4.48B	$420M
FY 2024	4.67B	411M	$4.44B	$409M
FY 2025	4.78B	431M	$4.29B	$406M

Source: Circana, Integrated Fresh, Fresh potatoes, Total U.S. and California region, MULO+, 2019-FY 2025

Five-Year Potato Pricing Review

Potatoes reached five-year highs in both price per volume and price per unit in 2023, nationally and in California. Prices declined in fiscal years 2024 and 2025. California potato prices remain above the national average.

Total U.S. vs. California	Price per volume Total U.S.	Price per volume California	Price per unit Total U.S.	Price per unit California
FY 2021	$0.76	$0.82	$3.15	$3.23
FY 2022	$0.83	$0.88	$3.37	$3.41
FY 2023	$0.99	$1.03	$3.98	$4.00
FY 2024	$0.95	$0.99	$3.84	$3.86
FY 2025	$0.90	$0.94	$3.62	$3.75

Source: Circana, Integrated Fresh, Fresh potatoes, Total U.S. and California region, MULO+, 2019-FY 2025

Price Review by Variety

Among the largest-selling varieties, Russet and white potatoes experienced the steepest declines in average price per pound, both nationally and in California. Prices for yellow potatoes remained relatively stable, while those for red potatoes experienced slight inflation.

FY 2025	Price per volume Total U.S.	% change vs. YA	Price per volume California	% change vs. YA
Total potatoes	**$0.90**	**-5.0%**	**$0.94**	**-4.7%**
Russet	$0.68	-11.0%	$0.70	-8.3%
Yellow	$1.21	+1.2%	$1.27	+1.2%
Red	$1.23	+3.6%	$1.45	+3.9%
All other	$1.90	+3.4%	$1.81	-2.0%
White	$0.80	-7.5%	$1.11	-11.1%
Fingerling	$2.60	-0.5%	$2.69	+1.2%
Red creamer	$2.05	+0.1%	$2.19	+3.7%
Long white	$1.24	-0.7%	$2.39	+5.4%
White creamer	$2.93	+2.5%	$5.27	-2.5%
Purple	$2.89	+1.3%	$2.75	-3.1%

Source: Circana, Integrated Fresh, Fresh potatoes, Total U.S. and California region, MULO+, 52 w.e. 7/13/2025

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FY 2025 Volume Performance by Variety

Russet potato pound sales grew 6.7% year-over-year in California, well ahead of the national increase of 3.6%. White potatoes also outperformed, posting 2.1% pound growth in California while losing ground nationwide.

FY 2025	Volume Sales Total U.S.	Volume share	Lbs Sales % vs. YA.	Volume Sales California	Volume share	Volume sales % vs. YA
Total potatoes	**4.8B**	**100.0%**	**+2.1%**	**432M**	**100.0%**	**+4.8%**
Russet	3.0B	62.3%	+3.6%	279M	64.7%	+6.7%
Yellow	932M	19.5%	+6.2%	80M	18.5%	+3.9%
Red	501M	10.5%	-10.1%	29M	6.8%	-12.7%
All other	178M	3.7%	+4.5%	24M	5.6%	+15.5%
White	170M	3.6%	-4.6%	17M	3.9%	+2.1%
Fingerling	10M	0.2%	+4.0%	1.7M	0.4%	+7.1%
Red creamer	9.0M	0.2%	-5.8%	0.4M	0.1%	-22.7%
Long white	2.2M	0.0%	+8.1%	12K	0.0%	-25.8%
White creamer	0.8M	0.0%	-16.6%	0.2M	0.0%	-2.8%
Purple	0.6M	0.0%	-8.7%	0.1M	0.0%	-1.6%

Source: Circana, Integrated Fresh, Fresh potatoes, Total U.S. and California region, MULO+, 52 w.e. 7/13/2025

FY 2025 Dollar Performance by Variety

As a result of deflation, Russet's 6.7% increase in pounds did not correspond to dollar growth. Yellow, all other, and fingerling potatoes all experienced positive year-over-year volume growth in California.

FY 2025	$ Sales Total U.S.	Dollar share	$ Sales % vs. YA.	$ Sales California	Dollar share	$ Sales % vs. YA
Total potatoes	**$4.3B**	**100.0%**	**-3.0%**	**$407M**	**100.0%**	**-0.1%**
Russet	$2.0B	47.1%	-7.8%	$194M	47.7%	-2.2%
Yellow	$1.1B	26.2%	+7.4%	$102M	25.0%	+5.1%
Red	$619M	14.4%	-6.8%	$43M	10.5%	-9.3%
All other	$338M	7.9%	+8.0%	$44M	10.7%	+13.2%
White	$136M	3.2%	-11.7%	$19M	4.6%	-9.2%
Fingerling	$27M	0.6%	+3.5%	$4.5M	1.1%	+8.5%
Red creamer	$18M	0.4%	-5.7%	$0.8M	0.2%	-19.9%
Long white	$2.7M	0.1%	+7.3%	$28K	0.0%	-21.8%
White creamer	$2.4M	0.1%	-14.5%	$0.8M	0.2%	-5.2%
Purple	$1.7M	0.0%	-7.5%	$0.2M	0.0%	-4.6%

Source: Circana, Integrated Fresh, Fresh potatoes, Total U.S. and California region, MULO+, 52 w.e. 7/13/2025

FY 2025 Organic Sales Performance

California represented 17% of the total U.S. organic potato market, nearly double its share of overall potato sales. Organic potatoes were a strong growth driver in the state, with double-digit increases in dollar, unit, and pound sales, as prices declined 6.4% year over year. Despite this growth, organic remained a niche offering, accounting for 8% of total potato sales in California in 2025.

Organic	$ Sales	$ vs. YA	Volume sales	Pounds vs. YA	Price per pound	Price vs. YA
U.S.	$215.8M	+3.5%	125.4M	-1.2%	$1.72	+4.8%
California	$36.9M	+13.1%	27.8M	+20.8%	$1.33	-6.4%

Source: Circana, Integrated Fresh, Total U.S. and California region, Organic potatoes, MULO+, 52 w.e. 7/13/2025 (FY 2025)

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FY 2025 Sales by Package Size in California

Five-pound bags, the top seller in California, remained flat in both dollars and pounds. Larger pack sizes, including eight- and 10-pound bags, saw strong volume growth in fiscal year 2025, as consumers responded to deflation. Small pack sizes also grew year-over-year.

Pack size	$ Sales	$ vs. YA	Volume sales	Pounds vs. YA
Fresh <2 lbs	$65M	+3.0%	25M	+4.3%
Fresh 2<5 lbs	$25M	+3.0%	15M	+2.2%
Fresh 5 lbs	$124M	-0.2%	153M	+0.2%
Fresh 8 lbs	$2.7M	-2.3%	3.4M	+12.7%
Fresh 10 lbs	$77M	+6.8%	146M	+13.7%
Fresh > 10 lbs	$4M	-22.6%	10M	+4.3%
Random weight	$109M	-5.6%	79M	-0.4%

Source: Circana, Integrated Fresh, California region, MULO+, 52 w.e. 7/13/2025 (FY 2025)