

2025 ANNUAL FOODSERVICE VOLUMETRIC REPORT

This report measures the total volume and dollar sales of potatoes in the foodservice industry from July 2024 to June 2025.

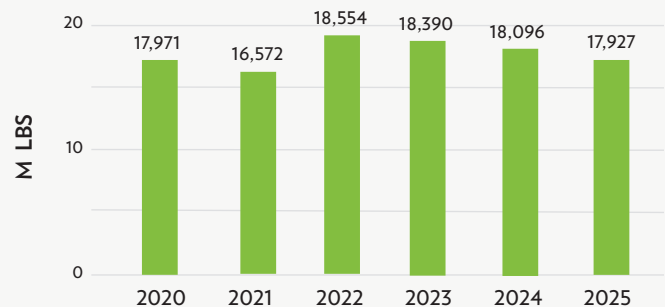


HIGHLIGHTS

KEY MARKET TRENDS

- Total foodservice potato sales were \$11.2B, representing 17.9 billion pounds.
- Healthcare (including Senior Living) increased volume by 5% and was the largest increase of all sectors.
- Chips were up in volume by 1% over previous year.
- Mashed potatoes grew 3% in fresh and refrigerated and declined 1% in dehydrated formats.
- Overall pricing softened a modest 3%.

POTATOES REMAIN AMERICA'S FAVORITE VEGETABLE



FOODSERVICE SECTOR SPOTLIGHT

Limited-service restaurants continue to represent the largest share of both total potato dollars and pounds sold, followed by full-service restaurants.

THE FAST CASUAL SEGMENT GREW

19M LBS
IN VOLUME IN 2025

THE HEALTHCARE SEGMENT GREW

30M LBS
IN VOLUME IN 2025

- LSR (quick-service and fast casual) 47% \$ share (\$5,239M)
- FSR (midscale, casual dining, fine dining) 26% \$ share (\$2,922M)
- Beyond Restaurants (Travel & Leisure, Business & Industry, College & University, Healthcare, K-12, Retail Hosts, Refreshment Services) 27% \$ share (\$3,023M)

**FROZEN POTATOES
MY'25 MILLIONS OF POUNDS**





POTATO FORMATS SPOTLIGHT

FROZEN POTATOES STILL DOMINATE ALL POTATO FORMATS WITH 63% OF VOLUME, WHILE WHOLE FRESH REPRESENTS ABOUT 20%, CHIPS 7%, DEHYDRATED 6%, AND REFRIGERATED 4%.

FROZEN

11,259 MILLION POUNDS SOLD IN 2025
VOLUME CHANGE: -1%

CHIPS

1,310 MILLION POUNDS SOLD IN 2025
VOLUME CHANGE: +1%

WHOLE FRESH

3,577 MILLION POUNDS SOLD IN 2025

Application Spotlight: Consumers love their mashed potatoes! Fresh Mashed Potatoes represent 21M lbs of the whole fresh category, increasing by +3% and Sides represent 10M lbs, increasing +2%.

VOLUME CHANGE: -1%

REFRIGERATED

726 MILLION POUNDS SOLD IN 2025
VOLUME CHANGE: 0%

DEHYDRATED

1,025 MILLION POUNDS SOLD IN 2025
VOLUME CHANGE: -2%

METHODOLOGY

Source: Technomic MY2025 Foodservice Potato Volumetric Assessment. Data based on operator surveys, distributor sales data, supplier interviews, and market modeling. All volume is expressed in Fresh Weight Equivalents (FWE). For the full study, please contact Potatoes USA, Foodservice@PotatoesUSA.com