

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 spans a fiscal year (FY) from July 2024 to June 2025.

Top findings — Great Lakes

- The Great Lakes is a key potato consumption region, representing 14.6% of potato unit sales.
- FY 2025 represented the second-highest year in volume sales, with robust growth in 8-pound bags.
- Deflation affected dollar sales but boosted volume sales. This affected Russet potatoes the most.
- Russet potatoes generated 63% of sales, with volume growth dominating the overall performance.
- Organic potatoes under-indexed and under-performed in the Great Lakes region.

Great Lakes Unit Shares

The Great Lakes is a significant market, accounting for 14.7% of the country’s total food and beverage unit sales in FY 2025. While the region under-indexed for produce and vegetables overall, potato sales are right on par, representing 14.6% of the nation’s potato unit sales.

- 14.7% of total food and beverages
- 14.4% of total fresh departments
- 13.9% of total fresh produce
- 13.9% of total fresh vegetables
- 14.6% of total fresh potatoes



Source: Circana, Integrated Fresh, Great Lakes region as a share of total U.S., MULO+, 52 w.e. 07/13/2025 (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 faced modest growth nationwide, with unit and volume gains offset by deflation. The Great Lakes region experienced a 4.4% increase in vegetable pounds. The potato performance in the region mirrored the national trend, with 2.1% volume growth, while deflationary conditions impacted dollar sales.

Total U.S. vs. Great Lakes	\$ 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%
Great Lakes vegetables	\$6.1B	+1.8%	2.6B	+1.2%	3.3B	+4.4%
U.S. potatoes	\$4.3B	-3.2%	1.2B	+2.3%	4.8B	+2.1%
Great Lakes potatoes	\$611M	-2.0%	173M	+2.5%	715M	+2.1%

Source: Circana, Integrated Fresh, Total U.S. and Great Lakes region, MULO+, 52 w.e. 07/13/2025 (FY 2025)

Five-Year Potato Performance Review

Fiscal year 2025 ranked as the best of the past five years for total U.S. volume sales. Potato volume sales in the Great Lakes were also the second highest on record over the same period, outpaced by FY 2021

Total U.S. vs. Great Lakes	Volume Sales Total U.S.	Volume Sales Great Lakes	\$ Sales Total U.S.	\$ Sales Great Lakes
FY 2021	4.74B	732M	\$3.62B	\$507M
FY 2022	4.61B	695M	\$3.81B	\$543M
FY 2023	4.54B	682M	\$4.48B	\$627M
FY 2024	4.67B	699M	\$4.44B	\$626M
FY 2025	4.78B	716M	\$4.29B	\$612M

Source: Circana, Integrated Fresh, Fresh potatoes, Total U.S. and Great Lakes 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, both nationally and in the Great Lakes region. Potato prices fell in fiscal year 2025, which pressured dollar sales but supported growth in units and volume.

Total U.S. vs. Great Lakes	Price per volume Total U.S.	Price per volume Great Lakes	Price per unit Total U.S.	Price per unit Great Lakes
FY 2021	\$0.76	\$0.69	\$3.15	\$3.04
FY 2022	\$0.83	\$0.78	\$3.37	\$3.33
FY 2023	\$0.99	\$0.92	\$3.98	\$3.86
FY 2024	\$0.95	\$0.90	\$3.84	\$3.72
FY 2025	\$0.90	\$0.85	\$3.62	\$3.54

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

Price Review by Variety

Among the top sellers, Russet potatoes experienced the most significant decline in the average price per pound in the Great Lakes, at -10.3%. Prices for yellow, red, and fingerling potatoes increased slightly.

FY 2025	Price per volume Total U.S.	% change vs. YA	Price per volume Great Lakes	% change vs. YA
Total potatoes	\$0.90	-5.0%	\$0.86	-4.0%
Russet	\$0.68	-11.0%	\$0.64	-10.3%
Yellow	\$1.21	+1.2%	\$1.14	+2.6%
Red	\$1.23	+3.6%	\$1.17	+5.3%
All other	\$1.90	+3.4%	\$1.97	-3.9%
White	\$0.80	-7.5%	\$1.04	-2.7%
Fingerling	\$2.60	-0.5%	\$2.45	+1.9%
Red creamer	\$2.05	+0.1%	\$1.94	-5.2%
Long white	\$1.24	-0.7%	\$1.14	+0.5%
White creamer	\$2.93	+2.5%	\$1.95	+2.5%
Purple	\$2.89	+1.3%	\$3.03	+9.0%

Source: Circana, Integrated Fresh, Fresh potatoes, Total U.S. and Great Lakes region, MULO+, 52 w.e. 07/13/2025 (FY 2025)

FY 2025 Volume Performance by Variety

Pound performance varied widely. Russet potatoes had a very strong year in the Great Lakes region, with a 2.4% increase in pounds in fiscal year 2025. Accounting for more than 63% of all pounds sold in the region, Russets drove the majority of overall potato gains, with additional contributions from yellow and red potatoes.

FY 2025	Volume Sales Total U.S.	Volume share	Lbs Sales % vs. YA.	Volume Sales Great Lakes	Volume share	Volume sales % vs. YA
Total potatoes	4.8B	100.0%	+2.1%	715M	100.0%	+2.1%
Russet	3.0B	62.3%	+3.6%	457M	63.9%	+2.4%
Yellow	932M	19.5%	+6.2%	150M	21.0%	+7.3%
Red	501M	10.5%	-10.1%	79M	11.1%	-9.3%
All other	178M	3.7%	+4.5%	23M	3.2%	+10.6%
White	170M	3.6%	-4.6%	2.8M	0.4%	-22.2%
Fingerling	10M	0.2%	+4.0%	1.6M	0.2%	+1.6%
Red creamer	9.0M	0.2%	-5.8%	0.9M	0.1%	+15.5%
Long white	2.2M	0.0%	+8.1%	0.4M	0.1%	+16.2%
White creamer	0.8M	0.0%	-16.6%	0.2M	0.0%	-14.8%
Purple	0.6M	0.0%	-8.7%	0.1M	0.0%	-49.7%

Source: Circana, Integrated Fresh, Fresh potatoes, Total U.S. and Great Lakes region, MULO+, 52 w.e. 07/13/2025 (FY 2025)

FY 2025 Dollar Performance by Variety

Due to deflationary conditions, sales of Russet potatoes in dollars declined by more than 8%. Representing 48% of the volume sales, this had a significant impact on the total region's sales. Yellow, the second-largest commodity, grew by 10.1% which helped offset some of the decline.

FY 2025	\$ Sales Total U.S.	Dollar share	\$ Sales % vs. YA.	\$ Sales Great Lakes	Dollar share	\$ Sales % vs. YA
Total potatoes	\$4.3B	100.0%	-3.0%	\$611M	100.0%	-2.0%
Russet	\$2.0B	47.1%	-7.8%	\$293M	47.9%	-8.1%
Yellow	\$1.1B	26.2%	+7.4%	\$172M	28.1%	+10.1%
Red	\$619M	14.4%	-6.8%	\$93M	15.1%	-4.5%
All other	\$338M	7.9%	+8.0%	\$44M	7.2%	+6.4%
White	\$136M	3.2%	-11.7%	\$2.9M	0.5%	-24.3%
Fingerling	\$27M	0.6%	+3.5%	\$3.9M	0.6%	+3.5%
Red creamer	\$18M	0.4%	-5.7%	\$1.7M	0.3%	+9.5%
Long white	\$2.7M	0.1%	+7.3%	\$0.4M	0.1%	+16.8%
White creamer	\$2.4M	0.1%	-14.5%	\$0.3M	0.1%	-12.7%
Purple	\$1.7M	0.0%	-7.5%	\$0.2M	0.0%	-45.2%

Source: Circana, Integrated Fresh, Fresh potatoes, Total U.S. and Great Lakes region, MULO+, 52 w.e. 07/13/2025 (FY 2025)

FY 2025 Organic Sales Performance

The Great Lakes accounted for nearly 12% of the total U.S. organic potato market in fiscal year 2025 (in dollars), below the region's overall potato sales share of 14.6%. Unlike regions such as the Northeast and California, organic potatoes were not a growth area in the Great Lakes, with both dollar and pound sales down year-over-year.

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%
Great Lakes	\$25.4M	-2.8%	17.6M	-9.9%	\$1.45	+7.9%

Source: Circana, Integrated Fresh, Total U.S. and Great Lakes region, Organic potatoes, MULO+, 52 w.e. 07/13/2025 (FY 2025)

FY 2025 Sales by Package Size in the Great Lakes

Five-pound bags were easily the biggest seller in the Great Lakes, at \$252 million. Due to deflation, five-pound bags declined in dollar sales but grew 0.9% in pounds. Eight-pound bags had the highest year-over-year growth in fiscal year 2025, at +16.1%.

Pack size	\$ Sales	\$ vs. YA	Volume sales	Pounds vs. YA
Fresh <2 lbs	\$125M	+4.4%	51M	+4.9%
Fresh 2-5 lbs	\$72M	+7.4%	57M	+6.3%
Fresh 5 lbs	\$252M	-5.0%	349M	+0.9%
Fresh 8 lbs	\$29M	+5.0%	43M	+16.1%
Fresh 10 lbs	\$90M	-5.4%	173M	-0.6%
Random weight	\$43K	-10.3%	42K	+3.6%

Source: Circana, Integrated Fresh, Great Lakes region, MULO+, 52 w.e. 07/13/2025 (FY 2025)