

FY 2025 Performance and Merchandising Review

Potatoes are a reliable, year-round produce department powerhouse, purchased by 85% of U.S. households. 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 — Mid South

- The Mid South is a large and growing potato region, representing 14.7% of total potato unit sales.
- Potato volume sales reached their second-highest point in six years in the Mid South.
- Deflation affected dollar sales but boosted volume sales. This affected Russet potatoes the most.
- Russet potatoes represented 64% of total potato volume sales, with robust annual growth.
- The Mid South experienced volume growth in smaller as well as larger pack sizes.

Mid South Unit Shares

The Mid South region underindexes in produce and vegetable sales, but overindexes in potato sales. Representing 14.7% of all potato unit sales, the Mid South is a crucial region for potato demand.

- 13.7% of total food and beverages
- 13.4% of total fresh departments
- 12.9% of total fresh produce
- 13.3% of total fresh vegetables
- 14.7% of total fresh potatoes

Source: Circana, Integrated Fresh, Mid South 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

The Mid South outperformed the national averages in both vegetable and potato sales. While total U.S. vegetable pounds grew 1.6% in fiscal year 2025, the Mid South posted 2.9% growth. Potato growth in the region was also more substantial than the national rate, increasing 3.6% compared to 2.1%, respectively.

| Total U.S. vs. Mid South | \$ 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% |
| Mid South vegetables | \$6.0B | +2.2% | 2.5B | +2.3% | 3.1B | +2.9% |
| U.S. potatoes | \$4.3B | -3.2% | 1.2B | +2.3% | 4.8B | +2.1% |
| Mid South potatoes | \$631M | -1.8% | 174M | +4.0% | 679M | +3.6% |

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

Regional Performance Series

Mid South



Five-Year Potato Performance Review

Fiscal year 2025 was the best in the past five years in volume sales for the U.S. and the Mid South. In the Mid South, potato sales reached 679 million pounds.

| Total U.S. vs. Mid South | Volume Sales Total U.S. | Volume Sales Mid South | \$ Sales Total U.S. | \$ Sales Mid South |
|--------------------------|-------------------------|------------------------|---------------------|--------------------|
| FY 2021 | 4.74B | 667M | \$3.62B | \$527M |
| FY 2022 | 4.61B | 644M | \$3.81B | \$548M |
| FY 2023 | 4.54B | 632M | \$4.48B | \$647M |
| FY 2024 | 4.67B | 653M | \$4.44B | \$644M |
| FY 2025 | 4.78B | 679M | \$4.29B | \$631M |

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

Five-Year Potato Pricing Review

Potatoes reached a five-year high in price per volume and price per unit in 2023, both nationwide and in the Mid South. Prices fell in fiscal year 2025, which negatively impacted dollar sales but positively affected unit and volume sales.

| Total U.S. vs. Mid South | Price per volume Total U.S. | Price per volume Mid South | Price per unit Total U.S. | Price per unit Mid South |
|--------------------------|-----------------------------|----------------------------|---------------------------|--------------------------|
| FY 2021 | \$0.76 | \$0.79 | \$3.15 | \$3.18 |
| FY 2022 | \$0.83 | \$0.85 | \$3.37 | \$3.39 |
| FY 2023 | \$0.99 | \$1.03 | \$3.98 | \$4.00 |
| FY 2024 | \$0.95 | \$0.99 | \$3.84 | \$3.87 |
| FY 2025 | \$0.90 | \$0.93 | \$3.62 | \$3.63 |

Source: Circana, Integrated Fresh, Fresh potatoes, Total U.S. and Mid South region, MULO+, 2019-2025 (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 Mid South, at -10.7%. The other varieties reflected a mix of inflation and deflation.

| FY 2025 | Price per volume Total U.S. | % change vs. YA | Price per volume Mid South | % change vs. YA |
|-----------------------|-----------------------------|-----------------|----------------------------|-----------------|
| Total potatoes | \$0.90 | -5.0% | \$0.93 | -5.3% |
| Russet | \$0.68 | -11.0% | \$0.73 | -10.7% |
| Yellow | \$1.21 | +1.2% | \$1.24 | +2.1% |
| Red | \$1.23 | +3.6% | \$1.25 | +2.5% |
| All other | \$1.90 | +3.4% | \$1.93 | -7.0% |
| White | \$0.80 | -7.5% | \$1.01 | +0.8% |
| Fingerling | \$2.60 | -0.5% | \$2.54 | -1.3% |
| Red creamer | \$2.05 | +0.1% | \$1.95 | +0.1% |
| Long white | \$1.24 | -0.7% | \$1.27 | +0.5% |
| White creamer | \$2.93 | +2.5% | \$1.93 | +1.2% |
| Purple | \$2.89 | +1.3% | \$3.29 | -1.4% |

Source: Circana, Integrated Fresh, Fresh potatoes, Total U.S. and Mid South region, MULO+, 2019-2025 (FY 2025)

FY 2025 Volume Performance by Variety

Pound performances varied widely, with Russet potatoes featuring robust pound growth in the Mid South, at +5.7%. A few of the smaller varieties also grew pounds, including All Other, white, and yellow.

| FY 2025 | Volume Sales Total U.S. | Volume share | Lbs Sales % vs. YA. | Volume Sales Mid South | Volume share | Volume sales % vs. YA |
|-----------------------|-------------------------|---------------|---------------------|------------------------|---------------|-----------------------|
| Total potatoes | 4.8B | 100.0% | +2.1% | 679M | 100.0% | +3.6% |
| Russet | 3.0B | 62.3% | +3.6% | 437M | 64.4% | +5.7% |
| Yellow | 932M | 19.5% | +6.2% | 127M | 18.7% | +5.3% |
| Red | 501M | 10.5% | -10.1% | 73M | 10.7% | -9.1% |
| All other | 178M | 3.7% | +4.5% | 23M | 3.3% | +24.4% |
| White | 170M | 3.6% | -4.6% | 18M | 2.7% | -14.6% |
| Fingerling | 10M | 0.2% | +4.0% | 0.9M | 0.1% | -2.4% |
| Red creamer | 9.0M | 0.2% | -5.8% | 0.5M | 0.1% | -8.5% |
| Long white | 2.2M | 0.0% | +8.1% | 0.1M | 0.0% | +17.4% |
| White creamer | 0.8M | 0.0% | -16.6% | 9K | 0.0% | -29.6% |
| Purple | 0.6M | 0.0% | -8.7% | 50K | 0.0% | -11.5% |

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

FY 2025 Dollar Performance by Variety

Due to deflation, Russet potatoes pulled down the average dollar performance for the Mid South. Less affected by inflationary and deflationary conditions over the past two years, yellow, all other, and long white potatoes experienced dollar sales growth year-over-year.

| FY 2025 | \$ Sales Total U.S. | Dollar share | \$ Sales % vs. YA. | \$ Sales Mid South | Dollar share | \$ Sales % vs. YA |
|-----------------------|---------------------|---------------|--------------------|--------------------|---------------|-------------------|
| Total potatoes | \$4.3B | 100.0% | -3.0% | \$631M | 100.0% | -1.8% |
| Russet | \$2.0B | 47.1% | -7.8% | \$318M | 50.4% | -5.6% |
| Yellow | \$1.1B | 26.2% | +7.4% | \$157M | 24.9% | +7.5% |
| Red | \$619M | 14.4% | -6.8% | \$91M | 14.4% | -6.9% |
| All other | \$338M | 7.9% | +8.0% | \$43M | 6.9% | +15.7% |
| White | \$136M | 3.2% | -11.7% | \$18M | 2.9% | -13.9% |
| Fingerling | \$27M | 0.6% | +3.5% | \$2.2M | 0.3% | -3.6% |
| Red creamer | \$18M | 0.4% | -5.7% | \$0.9M | 0.1% | -8.5% |
| Long white | \$2.7M | 0.1% | +7.3% | \$0.2M | 0.0% | +18.1% |
| White creamer | \$2.4M | 0.1% | -14.5% | \$18K | 0.0% | -28.8% |
| Purple | \$1.7M | 0.0% | -7.5% | \$0.2M | 0.0% | -12.8% |

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

FY 2025 Organic Sales Performance

The Mid South represented 12.4% of the total organic potato market in the U.S., which is lower than the region's overall potato sales share, at 14.7%. Additionally, organic potato dollar sales declined in dollars and pounds.

| Organic | \$ Sales | \$ vs. YA | Volume sales | Pounds vs. YA | Price per pound | Price vs. YA |
|-----------|----------|-----------|--------------|---------------|-----------------|--------------|
| U.S. | \$225.8M | +5.8% | 140.4M | +6.1% | \$1.61 | -0.3% |
| Mid South | \$28.0M | -3.6% | 14.7M | -18.0% | \$1.91 | +17.5% |

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

Regional Performance Series

Mid South



Sales by Package Size in the Mid South

Five-pound bags were easily the biggest seller in the Mid South. Due to deflation, five-pound bags declined in dollar sales but grew 1.3% in pounds. The same was true for eight- and 10-pound bags. Eight-pound bags had the highest growth rate in the Mid South region.

| Pack size | \$ Sales | \$ vs. YA | Volume sales | Pounds vs. YA |
|----------------|----------|-----------|--------------|---------------|
| Fresh <2 lbs | \$130M | +7.4% | 56M | +11.3% |
| Fresh 2-5 lbs | \$61M | +4.8% | 38M | +2.9% |
| Fresh 5 lbs | \$256M | -5.0% | 323M | +1.3% |
| Fresh 8 lbs | \$34M | -7.8% | 44M | +18.1% |
| Fresh 10 lbs | \$89M | -4.4% | 159M | +3.3% |
| Fresh > 10 lbs | \$1.5M | -14.6% | 4M | -11.5% |
| Random weight | \$61M | -11.8% | 55M | +5.9% |

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