Regional Performance Series

Plains

# 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 looks at a fiscal year (FY) from July 2024 to June 2025.

## Top findings — Plains

- The Plains is a small though growing potato region, representing 7.1% of total potato unit sales.
- Volume sales reached their second-highest point in six years, only behind the pandemic year.
- Deflation affected dollar sales but boosted volume sales. This affected Russet potatoes the most.
- The region has a narrower assortment than most, with a lot of focus on Russet, yellow, and red potatoes.
- The Plains shifted back to large package sizes, including 8- and 10-pound bags.

## Plains Unit Shares

While geographically large, the Plains region accounted for a relatively low 7.0% of the country's total food and perishable sales. The area is slightly less focused on total produce and vegetables, but its share of potato unit sales is 7.1%. This aligns with its share of the total food and beverages market.

- 7.0% of total food and beverages
- 6.9% of total fresh departments
- 6.4% of total fresh produce
- 6.5% of total fresh vegetables
- 7.1% of total fresh potatoes


Source: Circana, Integrated Fresh, Plains 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 Plains region experienced above-average growth in units and volume for total vegetables, despite a somewhat subdued performance for the country overall. Potato sales also performed better in the Plains region compared with the rest of the country, with increases in units and volume.

| Total U.S. vs. The Plains | $ 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% |
| Plains vegetables | $2.9B | +1.3% | 1.2B | +1.7% | 1.5B | +2.5% |
| U.S. potatoes | $4.3B | -3.2% | 1.2B | +2.3% | 4.8B | +2.1% |
| Plains Potatoes | $299M | -1.9% | 84M | +2.5% | 369M | +2.3% |

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

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## Five-Year Potato Performance Review

Fiscal year 2025 was the best in the past five years in volume sales. The same was true for the Plains, which generated 369 million pounds in fiscal year 2025. Dollar sales reached their highest point in 2023, driven by inflationary pressures.

| Total U.S. vs. The Plains | Volume Sales Total U.S. | Volume Sales Plains | $ Sales Total U.S. | $ Sales Plains |
|---|---|---|---|---|
| FY 2021 | 4.74B | 368M | $3.62B | $254M |
| FY 2022 | 4.61B | 353M | $3.81B | $269M |
| FY 2023 | 4.54B | 347M | $4.48B | $319M |
| FY 2024 | 4.67B | 360M | $4.44B | $306M |
| FY 2025 | 4.78B | 369M | $4.29B | $299M |

Source: Circana, Integrated Fresh, Fresh potatoes, Total U.S. and Plains region, MULO+, 2019-2025 (FY 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 Plains. Prices fell below 2023 levels over the past year, which negatively impacted dollar sales but boosted unit and volume sales.

| Total U.S. vs. The Plains | Price per volume Total U.S. | Price per volume Plains | Price per unit Total U.S. | Price per unit Plains |
|---|---|---|---|---|
| FY 2021 | $0.76 | $0.69 | $3.15 | $3.10 |
| FY 2022 | $0.83 | $0.76 | $3.37 | $3.36 |
| FY 2023 | $0.99 | $0.92 | $3.98 | $4.01 |
| FY 2024 | $0.95 | $0.85 | $3.84 | $3.74 |
| FY 2025 | $0.90 | $0.81 | $3.62 | $3.55 |

Source: Circana, Integrated Fresh, Fresh potatoes, Total U.S. and Plains 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 Plains, down 10.3%. Prices for the remaining varieties were a mix of inflation for yellow, red, and red creamers and deflation for all other potato categories, as well as long whites and white creamers.

| FY 2025 | Price per volume Total U.S. | % change vs. YA | Price per volume Plains | % change vs. YA |
|---|---|---|---|---|
| **Total potatoes** | **$0.90** | **-5.0%** | **$0.81** | **-4.1%** |
| Russet | $0.68 | -11.0% | $0.61 | -10.3% |
| Yellow | $1.21 | +1.2% | $1.11 | +1.3% |
| Red | $1.23 | +3.6% | $1.06 | +4.1% |
| All other | $1.90 | +3.4% | $2.11 | -5.5% |
| White | $0.80 | -7.5% | $1.19 | 0.0% |
| Fingerling | $2.60 | -0.5% | $2.81 | -3.1% |
| Red creamer | $2.05 | +0.1% | $1.91 | +14.7% |
| White | $1.24 | -0.7% | $1.05 | -31.1% |
| White creamer | $2.93 | +2.5% | $1.47 | -5.3% |
| Purple | $2.89 | +1.3% | $3.05 | +13.8% |

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

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## FY 2025 Volume Performance by Variety

Regional pound performances varied widely by variety, with Russet potato pound sales growing 1.8% year-over-year. Responsible for more than 64% of all potato pounds sold in the Plains, the growth in Russet drove the majority of the gains in potatoes overall. Yellow potatoes were also a substantial contributor.

| FY 2025 | Volume Sales Total U.S. | Volume share | Lbs Sales % vs. YA. | Volume Sales Plains | Volume share | Volume sales % vs. YA |
|---|---|---|---|---|---|---|
| **Total potatoes** | **4.8B** | **100.0%** | **+2.1%** | **369M** | **100.0%** | **+2.3%** |
| Russet | 3.0B | 62.3% | +3.6% | 237M | 64.2% | +1.8% |
| Yellow | 932M | 19.5% | +6.2% | 75M | 20.3% | +8.9% |
| Red | 501M | 10.5% | -10.1% | 45M | 12.2% | -6.6% |
| All other | 178M | 3.7% | +4.5% | 11M | 2.9% | +15.8% |
| White | 170M | 3.6% | -4.6% | 0.3M | 0.1% | -33.2% |
| Fingerling | 10M | 0.2% | +4.0% | 0.3M | 0.1% | -4.0% |
| Red Creamer | 9.0M | 0.2% | -5.8% | 0.5M | 0.1% | -17.8% |
| White | 2.2M | 0.0% | +8.1% | 26K | 0.0% | -18.8% |
| White Creamer | 0.8M | 0.0% | -16.6% | 0.1M | 0.0% | -18.7% |
| Purple | 0.6M | 0.0% | -8.7% | 26K | 0.0% | -16.7% |

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

## FY 2025 Dollar Performance by Variety

Driven by heavy deflation, Russet potatoes pulled down the average dollar performance for the Plains. While yellow potatoes did increase dollar sales, they could not overcome the gap left by Russets, given their dominance in the Plains region.

| FY 2025 | $ Sales Total U.S. | Dollar share | $ Sales % vs. YA. | $ Sales Plains | Dollar share | $ Sales % vs. YA |
|---|---|---|---|---|---|---|
| **Total potatoes** | **$4.3B** | **100.0%** | **-3.0%** | **$299M** | **100.0%** | **-1.9%** |
| Russet | $2.0B | 47.1% | -7.8% | $143M | 47.9% | -8.6% |
| Yellow | $1.1B | 26.2% | +7.4% | $83M | 27.7% | +10.3% |
| Red | $619M | 14.4% | -6.8% | $48M | 16.0% | -2.9% |
| All other | $338M | 7.9% | +8.0% | $23M | 7.6% | +9.5% |
| White | $136M | 3.2% | -11.7% | $0.3M | 0.1% | -33.2% |
| Fingerling | $27M | 0.6% | +3.5% | $1.0M | 0.3% | -7.0% |
| Red Creamer | $18M | 0.4% | -5.7% | $1.0M | 0.3% | -5.7% |
| White | $2.7M | 0.1% | +7.3% | $27K | 0.0% | -44.1% |
| White Creamer | $2.4M | 0.1% | -14.5% | $0.2M | 0.1% | -23.0% |
| Purple | $1.7M | 0.0% | -7.5% | $80K | 0.0% | -5.1% |

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

## FY 2025 Organic Sales Performance

The Plains represented 4.1% of the total organic potato market in the U.S. in fiscal year 2025, which is lower than the region's overall potato sales share of 7.1%. However, organic was a growth area, with double-digit gains for dollars and pounds.

| 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% |
| Plains | $8.9M | +31.0% | 4.7M | +17.3% | $1.89 | +11.7% |

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

## FY 2025 Sales by Package Size in the Plains

Five-pound bags were easily the biggest seller in the Plains. Due to deflation, five-pound bags declined in dollar sales. Pound sales were also down slightly year-on-year, due to consumers shifting to larger pack sizes. Both the eight-pound and the 10-pound bags experienced robust increases in pound sales. At the same time, small packs also experienced year-over-year growth.

| Pack size | $ Sales | $ vs. YA | Volume sales | Pounds vs. YA |
|---|---|---|---|---|
| Fresh <2 lbs | $53M | +6.5% | 20M | +7.4% |
| Fresh 2-5 lbs | $20M | +30.3% | 14M | +30.6% |
| Fresh 5 lbs | $135M | -5.2% | 193M | -0.9% |
| Fresh 8 lbs | $11M | +10.7% | 15M | +30.6% |
| Fresh 10 lbs | $47M | -4.9% | 98M | +3.4% |
| Fresh > 10 lbs | $0.5M | -41.1% | 1M | -42.8% |
| Random weight | $33M | -11.5% | 27M | -1.2% |

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