Regional Performance Series

South Central

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 235 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 — South Central

- The South Central represented 11.3% of total potato unit sales, with a substantial role for Russet.
- Deflationary conditions in Russet potatoes pulled down year-over-year dollar sales.
- Unlike all other regions, the South Central also experienced unit and volume pressure.
- Russet represented 64% of pound sales. The region also over-indexed for white potatoes.
- The region is far under the indexes for organic potato sales.

South Central Unit Shares

The South Central region accounts for approximately 12% of total food and beverage sales, as well as a slightly lower share of produce and vegetable sales. The region's share of total potato unit sales is significantly higher than its share of vegetable sales, at 11.1% versus 10.4%.

- 11.9% of total food and beverages
- 10.9% of total fresh departments
- 10.7% of total fresh produce
- 10.4% of total fresh vegetables
- 11.1% of total fresh potatoes

Source: Circana, Integrated Fresh, South Central 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

Vegetable sales were somewhat subdued nationwide. Mild unit and volume growth was offset by deflation, resulting in just 0.6% year-over-year growth in fiscal year 2025. Potatoes had above-average unit and volume growth, but deeper inflation pulled down potato dollar sales by 3.2%. These patterns are very similar in the South Central region, though unlike other areas, potato pounds and units fell below year-ago levels.

Total U.S. vs. South Central	$ 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%
South Central vegetables	$4.0B	+0.6%	1.9B	+0.8%	2.4B	+0.6%
U.S. potatoes	$4.3B	-3.2%	1.2B	+2.3%	4.8B	+2.1%
South Central Potatoes	$444M	-6.3%	132M	-0.4%	547M	-2.1%

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

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Five-Year Potato Performance Review

For the total country, fiscal year 2025 was the best volume year on record. Most regions exhibit the same pattern; however, the volume in the South-Central region fell below year-ago levels. In fact, pound sales fell below 2021 levels. The same is true for dollar sales, reflecting a combination of deflation and lower demand.

Total U.S. vs. South Central	Volume Sales Total U.S.	Volume Sales South Central	$ Sales Total U.S.	$ Sales South Central
FY 2021	4.74B	557M	$3.62B	$365M
FY 2022	4.61B	550M	$3.81B	$389M
FY 2023	4.54B	540M	$4.48B	$479M
FY 2024	4.67B	558M	$4.44B	$476M
FY 2025	4.78B	547M	$4.29B	$443M

Source: Circana, Integrated Fresh, Fresh potatoes, Total U.S. and South Central 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 South Central region. Prices fell to 2023 levels for fiscal year 2025, which negatively affected dollar sales.

Total U.S. vs. South Central	Price per volume Total U.S.	Price per volume South Central	Price per unit Total U.S.	Price per unit South Central
FY 2021	$0.76	$0.66	$3.15	$2.83
FY 2022	$0.83	$0.71	$3.37	$3.01
FY 2023	$0.99	$0.89	$3.98	$3.73
FY 2024	$0.95	$0.85	$3.84	$3.60
FY 2025	$0.90	$0.81	$3.62	$3.36

Source: Circana, Integrated Fresh, Fresh potatoes, Total U.S. and South Central 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 South Central region, at -11.7%. Given its dominance in the marketplace, this had a profound impact on both overall pricing and dollar sales results.

FY 2025	Price per volume Total U.S.	% change vs. YA	Price per volume South Central	% change vs. YA
Total potatoes	**$0.90**	**-5.0%**	**$0.81**	**-4.3%**
Russet	$0.68	-11.0%	$0.64	-11.7%
Yellow	$1.21	+1.2%	$1.19	+1.7%
Red	$1.23	+3.6%	$1.24	+6.9%
All other	$1.90	+3.4%	$1.83	+50.3%
White	$0.80	-7.5%	$0.67	-10.1%
Fingerling	$2.60	-0.5%	$2.59	-0.8%
Red creamer	$2.05	+0.1%	$1.11	-1.8%
Long white	$1.24	-0.7%	$1.56	+3.9%
White creamer	$2.93	+2.5%	$4.61	+3.4%
Purple	$2.89	+1.3%	$2.51	-0.8%

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

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FY 2025 Volume Performance by Variety

Regional pound performances varied widely by type, with Russet potatoes experiencing a 3.2% decline in volume sales in the South-Central region. Responsible for more than 63% of all pounds sold in the South-Central region, the decline significantly impacted the overall regional performance, despite a 12.0% growth in yellow potatoes.

FY 2025	Volume Sales Total U.S.	Volume share	Lbs Sales % vs. YA.	Volume Sales South Central	Volume share	Volume sales % vs. YA
Total potatoes	**4.8B**	**100.0%**	**+2.1%**	**547M**	**100.0%**	**-2.1%**
Russet	3.0B	62.3%	+3.6%	346M	63.3%	-3.2%
Yellow	932M	19.5%	+6.2%	83M	15.2%	+12.0%
Red	501M	10.5%	-10.1%	51M	9.4%	-9.9%
All other	178M	3.7%	+4.5%	13M	2.4%	-37.7%
White	170M	3.6%	-4.6%	52M	9.5%	+8.8%
Fingerling	10M	0.2%	+4.0%	0.6M	0.1%	+30.1%
Red creamer	9.0M	0.2%	-5.8%	0.2M	0.0%	-2.1%
Long white	2.2M	0.0%	+8.1%	0.3M	0.0%	-10.1%
White creamer	0.8M	0.0%	-16.6%	0.1M	0.0%	-8.8%
Purple	0.6M	0.0%	-8.7%	35K	0.0%	-27.8%

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

FY 2025 Dollar Performance by Variety

Due to substantial deflation, Russet potatoes pulled down the average dollar performance for the South Central. Russet potatoes represented more than 49% all potato sales in the South Central. Yellow potatoes grew year-on-year but were unable to bridge the gap left by Russet's deflationary conditions.

FY 2025	$ Sales Total U.S.	Dollar share	$ Sales % vs. YA.	$ Sales South Central	Dollar share	$ Sales % vs. YA
Total potatoes	**$4.3B**	**100.0%**	**-3.0%**	**$444M**	**100.0%**	**-6.3%**
Russet	$2.0B	47.1%	-7.8%	$220M	49.5%	-14.5%
Yellow	$1.1B	26.2%	+7.4%	$100M	22.4%	+13.9%
Red	$619M	14.4%	-6.8%	$64M	14.3%	-3.7%
All other	$338M	7.9%	+8.0%	$24M	5.4%	-6.4%
White	$136M	3.2%	-11.7%	$35M	7.8%	-2.2%
Fingerling	$27M	0.6%	+3.5%	$1.5M	0.3%	+29.0%
Red creamer	$18M	0.4%	-5.7%	$0.2M	0.1%	-3.9%
Long white	$2.7M	0.1%	+7.3%	$0.4M	0.1%	-6.6%
White creamer	$2.4M	0.1%	-14.5%	$0.4M	0.1%	-5.7%
Purple	$1.7M	0.0%	-7.5%	$0.1M	0.0%	-28.4%

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

FY 2025 Organic Sales Performance

The South Central region represented 6.8% of the total organic potato market in the U.S., which is far lower than the region's overall potato sales share of 11.1%. Organic potato sales struggled in the South Central over the past year. The area lost ground in dollars and pounds, as prices increased 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%
South Central	$14.7M	-15.2%	7.7M	-31.5%	$1.92	+23.8%

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

FY 2025 Sales by Package Size in the South Central

Five-pound bags were easily the biggest seller in the South Central region. Unlike other areas, five-pound bags lost ground in dollars and volume in fiscal year 2025. In part, this was due to a shift back to larger pack sizes, with robust volume growth for both eight-pound and 10-pound packages. Some of the smaller pack sizes also delivered growth.

Pack size	$ Sales	$ vs. YA	Volume sales	Pounds vs. YA
Fresh <2 lbs	$68M	-2.5%	27M	+1.4%
Fresh 2-5 lbs	$37M	+23.0%	28M	+24.6%
Fresh 5 lbs	$159M	-8.5%	225M	-7.8%
Fresh 8 lbs	$29M	-1.7%	39M	+16.7%
Fresh 10 lbs	$73M	-6.7%	150M	+2.9%
Fresh > 10 lbs	$3M	-48.5%	8M	+53.8%
Random weight	$76M	-13.3%	69M	+1.7%

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