Regional Performance Series

Southeast

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 — Southeast

- The Southeast is one of the largest regions, representing nearly 16% of total potato unit sales.
- Volume sales were the highest in six years, even exceeding the pandemic high.
- Deflation affected dollar sales but boosted volume sales. This affected Russet potatoes the most.
- The region over-indexed for Russet and red potatoes, while yellow potatoes grew substantially.
- Organic potatoes represent an above-average share in the Southeast.

Southeast Unit Shares

The Southeast is one of the largest and fastest-growing regions, accounting for more than 16% of all food and beverage unit sales in fiscal year 2025. The region's share of produce and potatoes aligns with its contribution to the total food and beverage sector. The Southeast share of fresh vegetables trails slightly, at 15.1%.

- 16.1% of total food and beverages
- 15.9% of total fresh departments
- 15.5% of total fresh produce
- 15.1% of total fresh vegetables
- 15.7% of total fresh potatoes

Source: Circana, Integrated Fresh, Southeast 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

Vegetables posted mild growth in fiscal year 2025. Unit and volume sales increased modestly, while dollar sales declined due to deflationary conditions. In the Southeast, vegetable sales outperformed, with sales in dollars, units, and volume exceeding the nation's average. Potatoes followed a markedly different path, delivering robust year-over-year gains in units and volume nationwide, as well as even stronger performance in the Southeast. Potato pound sales rose 3.4% versus year-ago levels in California.

Total U.S. vs. Southeast	$ 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%
Southeast vegetables	$7.1B	+1.9%	2.8B	+1.9%	3.4B	+1.4%
U.S. potatoes	$4.3B	-3.2%	1.2B	+2.3%	4.8B	+2.1%
Southeast potatoes	$725M	-2.4%	186M	+3.1%	725M	+3.4%

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

Potatoes USA

Five-Year Potato Performance Review

The 2025 fiscal year was the best of the past five years in terms of volume sales. In the Southeast, potato production reached its highest volume on record. Dollar sales also grew compared to last year, making it one of the few markets with positive dollar gains.

Total U.S. vs. Southeast	Volume Sales Total U.S.	Volume Sales Southeast	$ Sales Total U.S.	$ Sales Southeast
FY 2021	4.74B	667M	$3.62B	562M
FY 2022	4.61B	668M	$3.81B	614M
FY 2023	4.54B	665M	$4.48B	747M
FY 2024	4.67B	699M	$4.44B	744M
FY 2025	4.78B	724M	$4.29B	724M

Source: Circana, Integrated Fresh, Fresh potatoes, Total U.S. and Southeast 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 Southeast. Prices fell below 2023 levels in fiscal year 2025, which negatively affected dollar sales but boosted unit and volume sales.

Total U.S. vs. Southeast	Price per volume Total U.S.	Price per volume Southeast	Price per unit Total U.S.	Price per unit Southeast
FY 2021	$0.76	$0.84	$3.15	$3.24
FY 2022	$0.83	$0.92	$3.37	$3.53
FY 2023	$0.99	$1.12	$3.98	$4.30
FY 2024	$0.95	$1.06	$3.84	$4.13
FY 2025	$0.90	$1.00	$3.62	$3.90

Source: Circana, Integrated Fresh, Fresh potatoes, Total U.S. and Southeast 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 Southeast in fiscal year 2025, at -11.7%. Given its dominance in the Southeast potato market, this has a significant impact on the total drop in price per pound, reaching 5.5%.

FY 2025	Price per volume Total U.S.	% change vs. YA	Price per volume Southeast	% change vs. YA
Total potatoes	**$0.90**	**-5.0%**	**$1.00**	**-5.5%**
Russet	$0.68	-11.0%	$0.78	-11.7%
Yellow	$1.21	+1.2%	$1.37	+1.9%
Red	$1.23	+3.6%	$1.28	+4.7%
All other	$1.90	+3.4%	$1.99	-2.6%
White	$0.80	-7.5%	$0.99	-2.7%
Fingerling	$2.60	-0.5%	$2.70	-2.8%
Red creamer	$2.05	+0.1%	$2.09	+3.5%
Long white	$1.24	-0.7%	$1.29	-0.3%
White creamer	$2.93	+2.5%	$1.58	+4.5%
Purple	$2.89	+1.3%	$2.69	-16.8%

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

Regional Performance Series

Southeast

Potatoes USA

FY 2025 Volume Performance by Variety

Regional pound performances varied widely by type, with Russet potatoes having a banner year in fiscal year 2025. Pound sales increased 6.9%. Responsible for more than 63% of all pounds sold in the Southeast, the growth in Russet drove the majority of the gains in potatoes overall. Yellow potatoes also contributed to the overall volume increase.

FY 2025	Volume Sales Total U.S.	Volume share	Lbs Sales % vs. YA.	Volume Sales Southeast	Volume share	Volume sales % vs. YA
Total potatoes	**4.8B**	**100.0%**	**+2.1%**	**725M**	**100.0%**	**+3.4%**
Russet	3.0B	62.3%	+3.6%	459M	63.3%	+6.9%
Yellow	932M	19.5%	+6.2%	135M	18.6%	+7.0%
Red	501M	10.5%	-10.1%	93M	12.8%	-11.4%
All other	178M	3.7%	+4.5%	20M	2.8%	+10.2%
White	170M	3.6%	-4.6%	15M	2.1%	-22.6%
Fingerling	10M	0.2%	+4.0%	1.4M	0.2%	+23.5%
Red creamer	9.0M	0.2%	-5.8%	1.6M	0.2%	-17.7%
White	2.2M	0.0%	+8.1%	0.1M	0.0%	+15.1%
White creamer	0.8M	0.0%	-16.6%	0.3K	0.0%	-22.8%
Purple	0.6M	0.0%	-8.7%	19K	0.0%	+42.5%

Source: Circana, Integrated Fresh, Fresh potatoes, Total U.S. and Southeast 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 Southeast, whereas yellow potatoes performed the best among the major sellers.

FY 2025	$ Sales Total U.S.	Dollar share	$ Sales % vs. YA.	$ Sales Southeast	Dollar share	$ Sales % vs. YA
Total potatoes	**$4.3B**	**100.0%**	**-3.0%**	**$725M**	**100.0%**	**-2.4%**
Russet	$2.0B	47.1%	-7.8%	$359M	49.5%	-5.7%
Yellow	$1.1B	26.2%	+7.4%	$185M	25.5%	+9.0%
Red	$619M	14.4%	-6.8%	$119M	16.4%	-7.2%
All other	$338M	7.9%	+8.0%	$40M	5.6%	+7.3%
White	$136M	3.2%	-11.7%	$15M	2.0%	-24.6%
Fingerling	$27M	0.6%	+3.5%	$3.7M	0.5%	+20.1%
Red creamer	$18M	0.4%	-5.7%	$3.4M	0.5%	-14.8%
Long white	$2.7M	0.1%	+7.3%	$0.1M	0.0%	+14.8%
White creamer	$2.4M	0.1%	-14.5%	$0.5K	0.0%	-19.3%
Purple	$1.7M	0.0%	-7.5%	$0.1M	0.0%	+18.5%

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

FY 2025 Organic Sales Performance

The Southeast represented 21.6% of the total organic potato market in the U.S. in 2024, which is much higher than the region's overall potato sales share of 15.7%. Organic dollar sales grew 3.7% year-over-year, but this was driven by inflation.

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%
Southeast	$46.6M	+3.7%	22.4M	-4.8%	$2.08	+8.9%

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

FY 2025 Sales by Package Size in the Southeast

Five-pound bags were easily the biggest seller in the Southeast. Due to deflation, five-pound bags declined in dollar sales. Volume sales were also down slightly as consumers moved to eight- and 10-pound bags. Eight-pound bags had the highest year-over-year growth rate, but off a relatively small base. Packs between two and five pounds also had substantial pound gains.

Pack size	$ Sales	$ vs. YA	Volume sales	Pounds vs. YA
Fresh <2 lbs	$150M	+5.3%	58M	+8.5%
Fresh 2-5 lbs	$80M	+8.5%	53M	+10.0%
Fresh 5 lbs	$299M	-6.2%	361M	-0.6%
Fresh 8 lbs	$25M	+5.4%	33M	+20.2%
Fresh 10 lbs	$88M	+7.6%	155M	+7.6%
Fresh > 10 lbs	$0.9M	-25.1%	2M	-12.6%
Random weight	$82M	-12.6%	63M	+0.5%

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