Regional Performance Series

West

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 — West

- The West is represented by nearly 12% of total potato unit sales, with a lower index than total vegetables.
- Potato volume sales reached their second-highest level in six years.
- Deflation affected dollar sales but boosted volume sales. This affected Russet potatoes the most.
- Russet potatoes were 66% of total volume sales, with above-average growth for yellow potatoes.
- Organic potatoes slightly under index.

The West Unit Shares

The West region accounts for 11.4% of total food and beverage unit sales. The region over-indexes in its contribution to fresh produce and vegetables. While its potato share is also slightly higher, at 11.8%, this is 1.4 points below its vegetable share.

- 11.4% of total food and beverages
- 11.9% of total fresh departments
- 13.0% of total fresh produce
- 13.2% of total fresh vegetables
- 11.8% of total fresh potatoes

Source: Circana, Integrated Fresh, The West 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 Western region, vegetable sales underperformed, with sales tracking flat to down in dollars, units, and volume. Potatoes followed a markedly different path, delivering robust year-over-year gains in units and volume nationwide. While the Western region did experience unit and volume growth, it was lower than average.

Total U.S. vs. The West	$ 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%
West vegetables	$5.8B	+0.0%	2.5B	+0.3%	2.9B	+0.1%
U.S. potatoes	$4.3B	-3.2%	1.2B	+2.3%	4.8B	+2.1%
West Potatoes	$474M	-5.9%	139M	+1.4%	586M	+1.0%

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

Regional Performance Series

West

Five-Year Potato Performance Review

Fiscal year 2025 was the best in the past five years in volume sales. Unlike the total U.S., volume sales in the Western region were the third highest, at 586 million pounds. Dollar sales fell below 2023 levels due to deflation.

Total U.S. vs. The West	Volume Sales Total U.S.	Volume Sales West	$ Sales Total U.S.	$ Sales West
FY 2021	4.74B	588M	$3.62B	$399M
FY 2022	4.61B	574M	$3.81B	$424M
FY 2023	4.54B	567M	$4.48B	$512M
FY 2024	4.67B	580M	$4.44B	$506M
FY 2025	4.78B	586M	$4.29B	$472M

Source: Circana, Integrated Fresh, Fresh potatoes, Total U.S. and West region, 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 West. Prices fell below 2023 levels in fiscal year 2025, which negatively affected dollar sales but boosted unit and volume sales. The average cost per pound is below the nationwide average.

Total U.S. vs. The West	Price per volume Total U.S.	Price per volume West	Price per unit Total U.S.	Price per unit West
FY 2021	$0.76	$0.68	$3.15	$2.92
FY 2022	$0.83	$0.74	$3.37	$3.14
FY 2023	$0.99	$0.90	$3.98	$3.83
FY 2024	$0.95	$0.87	$3.84	$3.69
FY 2025	$0.90	$0.81	$3.62	$3.40

Source: Circana, Integrated Fresh, Fresh potatoes, Total U.S. and West region, 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 West, down 13.9%. Prices for yellow potatoes remained relatively stable, whereas those for red potatoes experienced inflation.

FY 2025	Price per volume Total U.S.	% change vs. YA	Price per volume West	% change vs. YA
Total potatoes	**$0.90**	**-5.0%**	**$0.81**	**-6.8%**
Russet	$0.68	-11.0%	$0.57	-13.9%
Yellow	$1.21	+1.2%	$1.16	+0.2%
Red	$1.23	+3.6%	$1.32	+3.9%
All other	$1.90	+3.4%	$1.91	+7.3%
White	$0.80	-7.5%	$0.71	-15.8%
Fingerling	$2.60	-0.5%	$2.60	-3.9%
Red creamer	$2.05	+0.1%	$1.88	-10.2%
Long white	$1.24	-0.7%	$1.31	-9.9%
White creamer	$2.93	+2.5%	$3.14	+1.2%
Purple	$2.89	+1.3%	$3.08	+5.6%

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

Regional Performance Series

West

Potatoes USA

FY 2025 Volume Performance by Variety

Regional pound performances varied widely by type. The main driver behind the positive pound growth was the 2.0% increase in Russet potatoes, combined with a 4.6% growth in yellow potatoes.

FY 2025	Volume Sales Total U.S.	Volume share	Lbs Sales % vs. YA.	Volume Sales West	Volume share	Volume sales % vs. YA
Total potatoes	**4.8B**	**100.0%**	**+2.1%**	**586M**	**100.0%**	**+1.0%**
Russet	3.0B	62.3%	+3.6%	388M	66.1%	+2.0%
Yellow	932M	19.5%	+6.2%	119M	20.3%	+4.6%
Red	501M	10.5%	-10.1%	46M	7.8%	-13.2%
All other	178M	3.7%	+4.5%	23M	4.0%	-5.3%
White	170M	3.6%	-4.6%	8.3M	1.4%	+8.5%
Fingerling	10M	0.2%	+4.0%	1.9M	0.3%	+9.5%
Red creamer	9.0M	0.2%	-5.8%	0.6M	0.1%	+94.7%
White	2.2M	0.0%	+8.1%	0.1K	0.0%	-73.9%
White creamer	0.8M	0.0%	-16.6%	0.1M	0.0%	+30.0%
Purple	0.6M	0.0%	-8.7%	0.1M	0.0%	+2.2%

Source: Circana, Integrated Fresh, Fresh potatoes, Total U.S. and West region, 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 West, with the gain of 4.8% in yellow potatoes unable to offset the 12.3% decline in Russets.

2025	$ Sales Total U.S.	Dollar share	$ Sales % vs. YA.	$ Sales West	Dollar share	$ Sales % vs. YA
Total potatoes	**$4.3B**	**100.0%**	**-3.0%**	**$474M**	**100.0%**	**-5.9%**
Russet	$2.0B	47.1%	-7.8%	$219M	46.3%	-12.3%
Yellow	$1.1B	26.2%	+7.4%	$138M	29.1%	+4.8%
Red	$619M	14.4%	-6.8%	$60M	12.7%	-9.8%
All other	$338M	7.9%	+8.0%	$44M	9.4%	+1.6%
White	$136M	3.2%	-11.7%	$5.9M	1.3%	-8.7%
Fingerling	$27M	0.6%	+3.5%	$5.0M	1.1%	+5.2%
Red creamer	$18M	0.4%	-5.7%	$1.1M	0.2%	+74.8%
White	$2.7M	0.1%	+7.3%	$0.2K	0.0%	-76.4%
White creamer	$2.4M	0.1%	-14.5%	$0.2M	0.1%	+31.6%
Purple	$1.7M	0.0%	-7.5%	$0.2M	0/0%	+8.0%

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

FY 2025 Organic Sales Performance

The West represented 11.2% of the total organic potato market in the U.S. in 2024, which is slightly lower than the region's overall potato sales share, at 11.8%. Organic was a growth area for the West. The region saw growth in organic potato sales, measured in both dollars and pounds, despite flat year-over-year prices.

Organic	$ Sales	$ vs. YA	Volume sales	Pounds vs. YA	Price per pound	Price vs. YA
U.S. Potatoes	$215.8M	+3.5%	125.4M	-1.2%	$1.72	+4.8%
Region Potatoes	$24.2M	+12.1%	14.5M	+12.0%	$1.67	+0.1%

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

Regional Performance Series

West

FY 2025 Sales by Package Size in the West

Five-pound bags were easily the biggest seller in the Northeast. Due to deflation, five-pound bags declined in dollar sales. Volume sales were also down slightly as consumers shifted to eight-pound bags. Small bags also saw a year-over-year increase in volume, particularly those between two and five pounds.

Pack size	$ Sales	$ vs. YA	Volume sales	Pounds vs. YA
Fresh <2 lbs	$90M	+0.2%	35M	+4.4%
Fresh 2-5 lbs	$32M	+29.2%	22M	+28.3%
Fresh 5 lbs	$170M	-8.8%	252M	-0.8%
Fresh 8 lbs	$13M	+6.3%	19M	+32.4%
Fresh 10 lbs	$82M	-9.1%	167M	-0.1%
Fresh > 10 lbs	$6M	-24.4%	15M	-10.6%
Random weight	$82M	-12.1%	77M	-1.6%

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