

# 2016 U.S. Potato Market Update

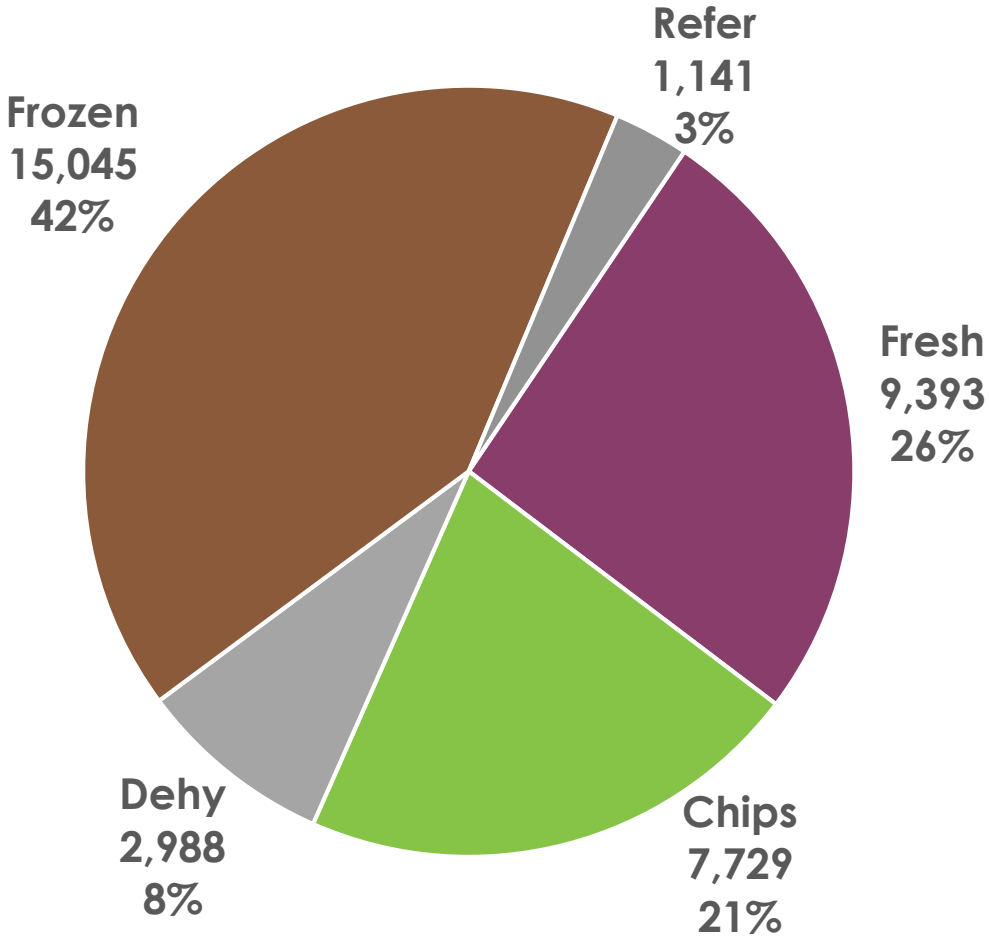
# Total U.S. Potato Utilization

**In Billion Pounds Fresh Weight Equivalent**

	Retail	+	FS	+	Exports	-	Imports	=	<b>Total</b>
<b>2015</b>	14,644		19,181		6,911		4,716		<b>36,019</b>
<b>2016</b>	14,524		20,389		6,976		5,119		<b>36,690</b>
<b>Change</b>	<b>-0.8%</b>		<b>6.3%</b>		<b>0.9%</b>		<b>10.2%</b>		<b>1.9%</b>

# Utilization by Product

2016 Millions of lbs. (FWE)\*

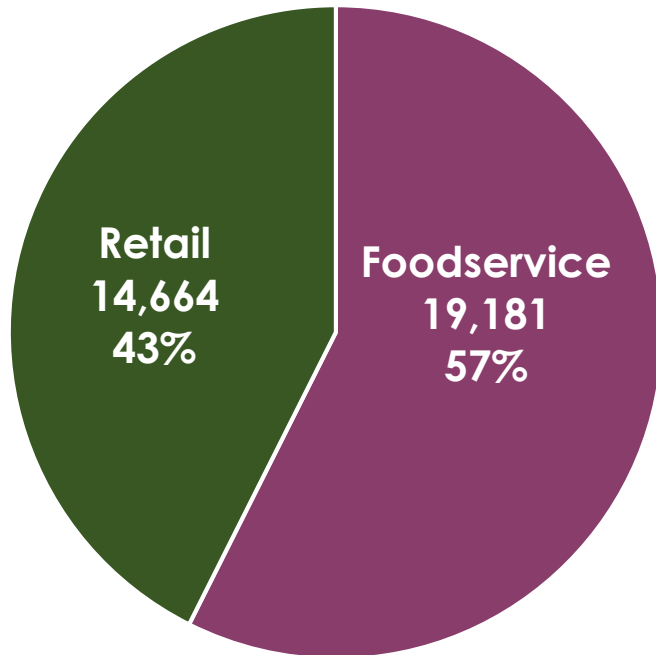


Fresh Weight Equivalent (FWE)

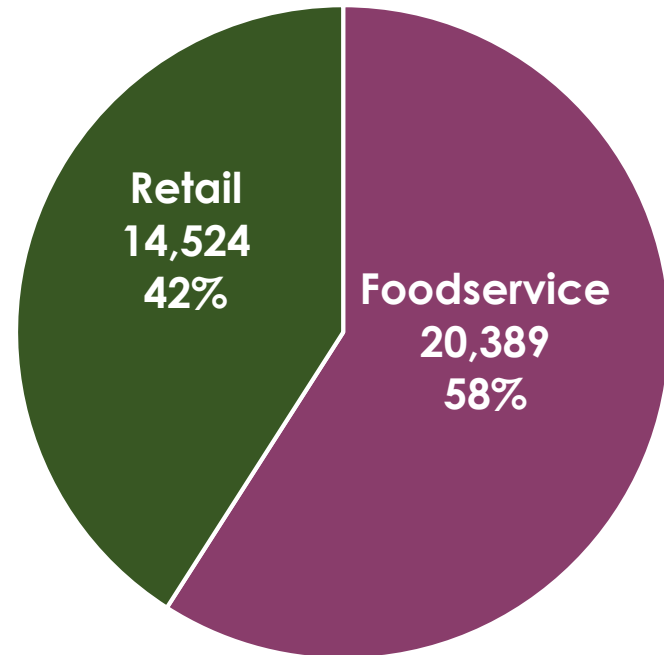
Frozen 1.7 to 1  
Dehy 6.5 to 1  
Chips 4 to 1

# Retail vs. Foodservice

2015 Millions of lbs. (FWE)\*



2016 Millions of lbs. (FWE)\*



# Retail Sales by Product

<b>Retail</b>			
<b>(millions of pounds FWE)</b>			
	<b>2015</b>	<b>2016</b>	<b>% change</b>
<b>Fresh</b>	4,973	4,892	-1.6%
<b>Chips</b>	5,884	5,870	-0.2%
<b>Dehy</b>	890	864	-3.0%
<b>Frozen</b>	2,070	2,066	-0.2%
<b>Refer</b>	411	439	6.9%
<b>Frozen RTE</b>	355	337	-5.0%
<b>Canned</b>	60	57	-5.0%
<b>Total</b>	<b>14,644</b>	<b>14,524</b>	<b>-0.8%</b>

# Consumer Usage

## Share of At-Home Dinners

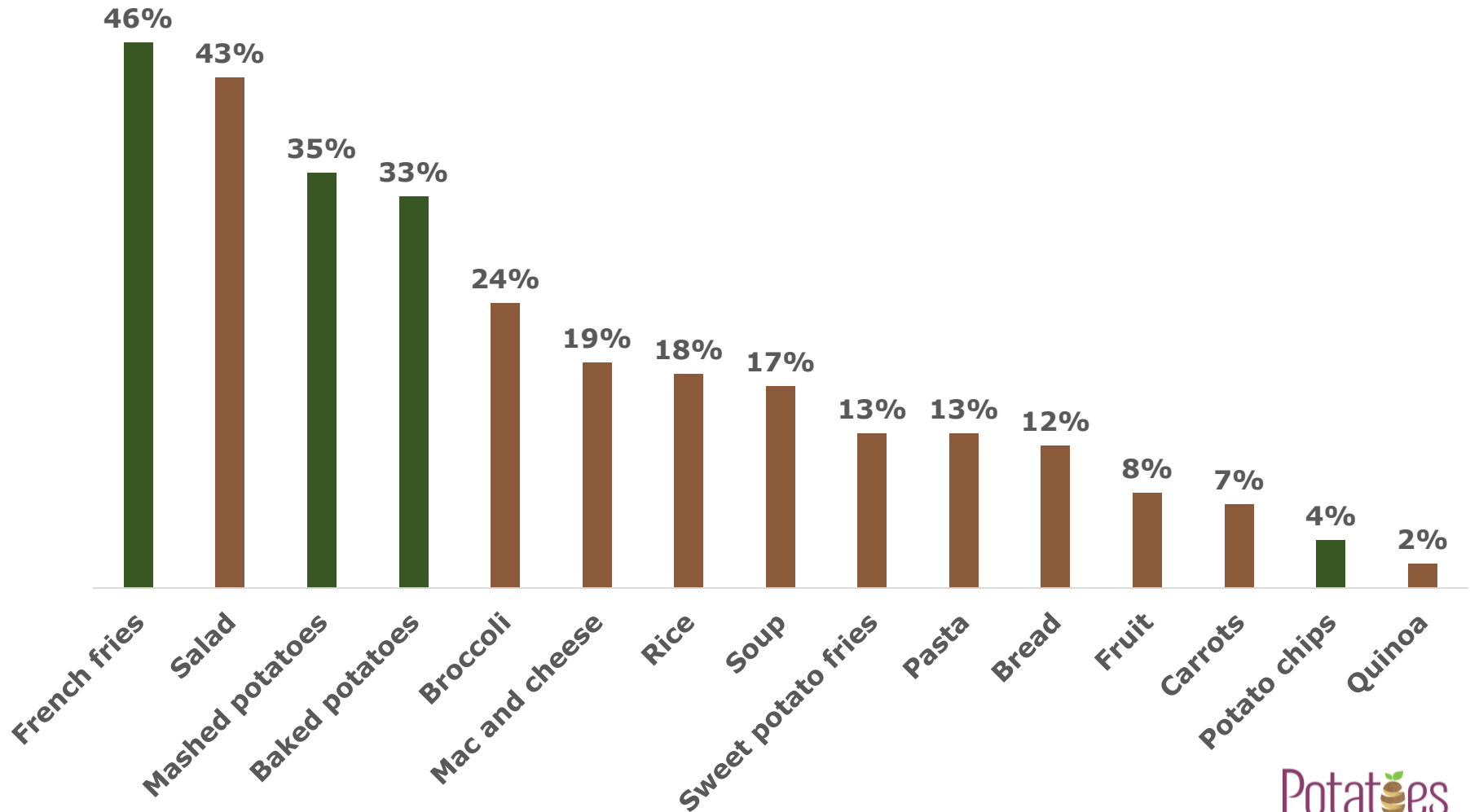
	Gen Pop	
	2017	% pt. change
<b># 1 Potatoes (including chips)</b>	<b>41%</b>	<b>+2pt</b>
Pasta	40%	+2pt
Rice	36%	-2pt
Poultry	31%	+1pt
Beef	29%	+3pts
Bagged salad	20%	-1pt
Broccoli	20%	-1pt
Corn	20%	+1pt
Green beans	20%	-1pt
Pork	18%	+1pt
Seafood	16%	-1pt
Sweet potatoes	12%	-1pt
Quinoa (or other grains)	10%	+2pts

# Foodservice Sales by Product

<b>Foodservice (millions of pounds FWE)</b>			
	<b>2015</b>	<b>2016</b>	<b>% change</b>
<b>Fresh</b>	4,310	4,379	1.6%
<b>Chips</b>	1,544	1,560	1.0%
<b>Dehy</b>	918	1,323	44.1%
<b>Frozen</b>	11,886	12,425	4.5%
<b>Refer</b>	522	702	34.5%
<b>Total</b>	<b>19,181</b>	<b>20,389</b>	<b>6.3%</b>

# Foodservice Usage

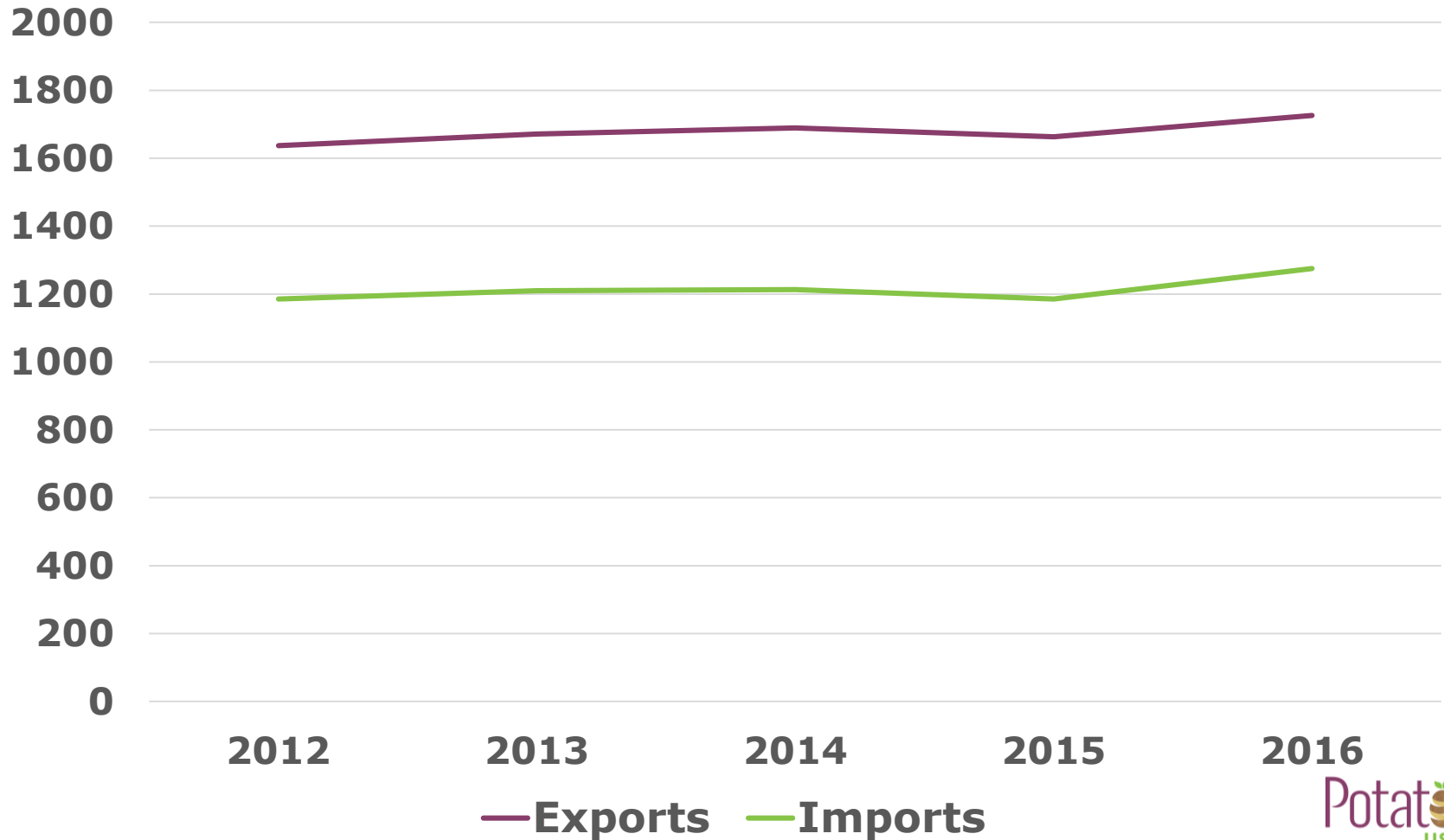
## Top Dishes When Eating at a Restaurant





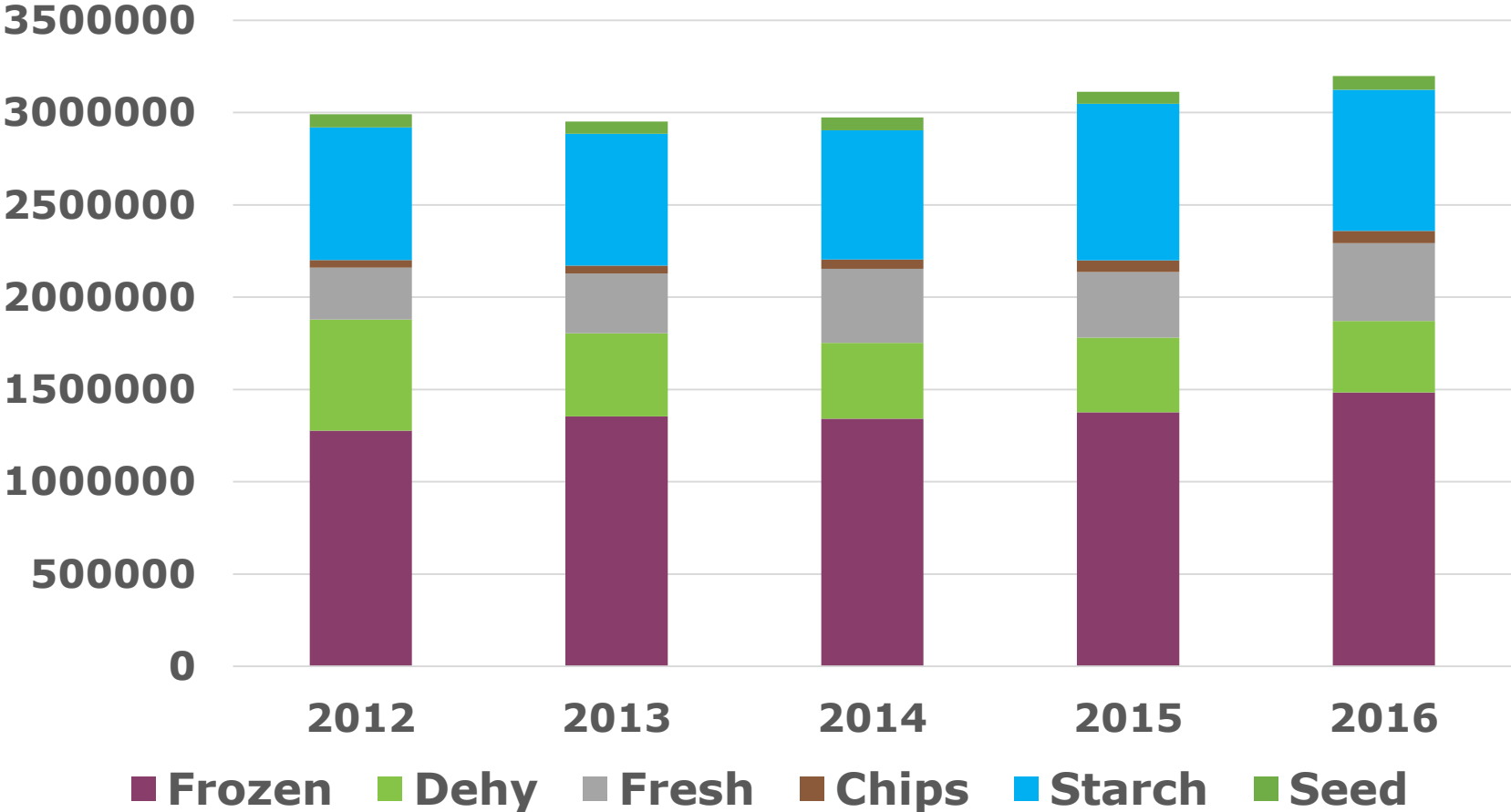
# U.S. Potato Imports & Exports

Value: \$ Millions



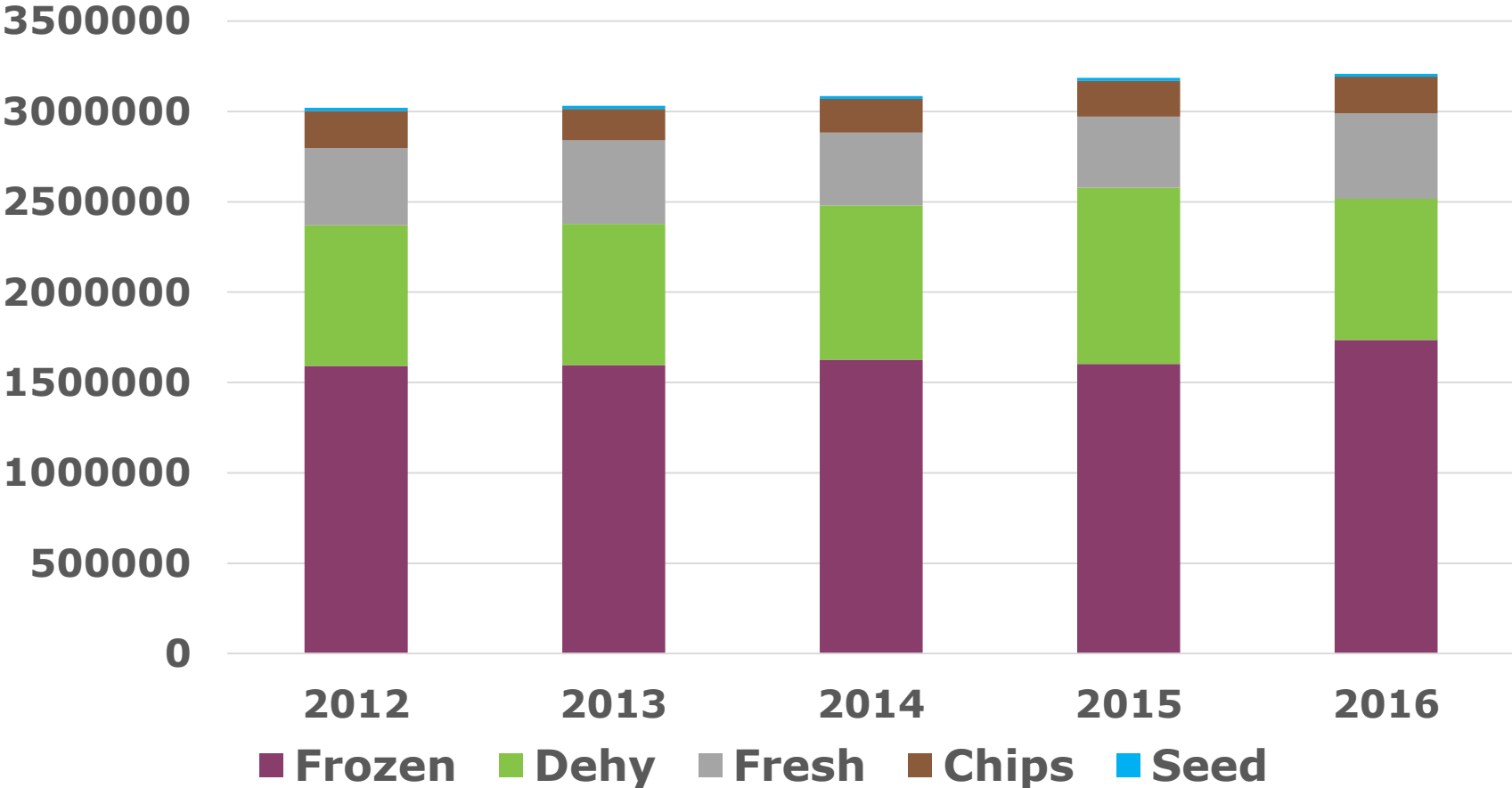
# U.S. Potato Imports

Metric Tons, FWE



# U.S. Potato Exports

## Metric Tons, FWE



# Top U.S. Export Markets

**Metric Tons, FWE**

	2012	2013	2014	2015	2016	% Change
Japan	717,873	591,364	619,730	656,635	636,751	11%
Canada	611,644	603,832	554,555	555,177	619,955	1%
Mexico	430,259	473,674	501,235	540,793	511,557	19%
China	207,683	199,722	180,920	220,976	231,363	11%
Korea	171,295	174,667	186,309	206,325	189,346	11%
Philippines	91,253	110,301	153,248	150,007	151,814	66%
Taiwan	102,304	101,974	100,900	91,088	124,347	22%

# The Markets are There



## Will We Seize Them?

- ✔ **Foodservice is Huge and Growing**
- ✔ **Retail is Changing**
- ✔ **International Demand Expanding**
- ✔ **New Channels?**

**Questions?**

**Thank You!**