

# TOTAL STORE QUARTERLY POTATO REPORT

Quarter 2 – Data Ending 12.31.16

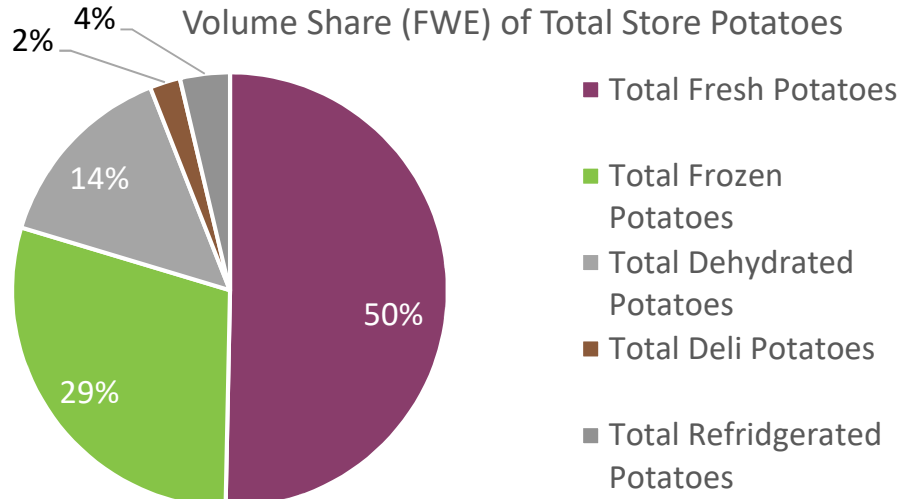


## NATIONAL TOTAL POTATO RETAIL PERFORMANCE

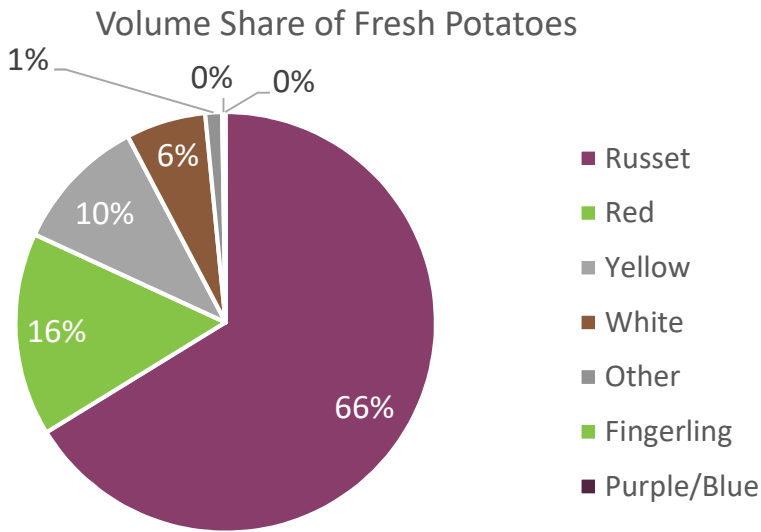
National Total Store Potato Sales	Dollars	Dollars % Change	Pounds	Pounds % Change	Price Per Pound	Price Per Pound % Change
FY 2016 – Q3	\$1,248,394,523	0.9%	1,179,569,562	-0.8%	\$1.06	1.7%
FY 2016 – Q4	\$1,202,682,263	0.8%	1,065,917,454	-1.7%	\$1.13	2.5%
FY 2017 - Q1	\$1,213,007,903	2.4%	1,049,596,495	-1.0%	\$1.16	3.4%
<b>FY 2017 – Q2</b>	<b>\$1,318,326,524</b>	<b>2.4%</b>	<b>1,263,196,097</b>	<b>-0.3%</b>	<b>\$1.04</b>	<b>2.7%</b>

Total Store Potatoes Includes:

- Fresh Potatoes excl. Sweet Potatoes (UPC and Non-UPC)
- Frozen Potatoes
- Dehydrated Potatoes
- Deli Potatoes
- Refrigerated Potatoes



## TOTAL FRESH PERFORMANCE



## KEY TAKEAWAYS

- Total Fresh Potato dollars are up 2.3% while pounds are down -1.0% most likely due to an increase in price per pounds
- Russet Potatoes are the largest contributor to category trends with more than half of the share of total Fresh Potatoes
- The largest dollar and pound growth is coming from Yellow and Other, while White Potatoes are declining in both dollars and pounds

Fresh Potatoes Q2	Dollars	Dollars % Change	Pounds	Pounds % Change	Price Per Pound	Price Per Pound % Change
Total Fresh Potatoes	\$ 546,519,247	2.3%	857,877,646	-1.0%	\$ 0.64	3.2%
Russet	\$ 287,107,670	-3.0%	568,241,986	-3.2%	\$ 0.51	0.2%
Other	\$ 20,955,192	66.1%	11,122,681	41.7%	\$ 1.88	17.2%
Purple/Blue	\$ 992,664	12.9%	454,992	10.4%	\$ 2.18	2.3%
White	\$ 32,000,711	-4.6%	52,677,941	-7.9%	\$ 0.61	3.6%
Fingerling	\$ 4,066,775	7.4%	1,834,209	10.4%	\$ 2.22	-2.7%
Yellow	\$ 84,169,587	14.9%	89,484,022	16.0%	\$ 0.94	-1.0%
Red	\$ 117,226,648	2.5%	134,061,815	-0.5%	\$ 0.87	3.0%

Source: Nielsen Perishables Group FreshFacts® (Fresh, deli and refrigerated)

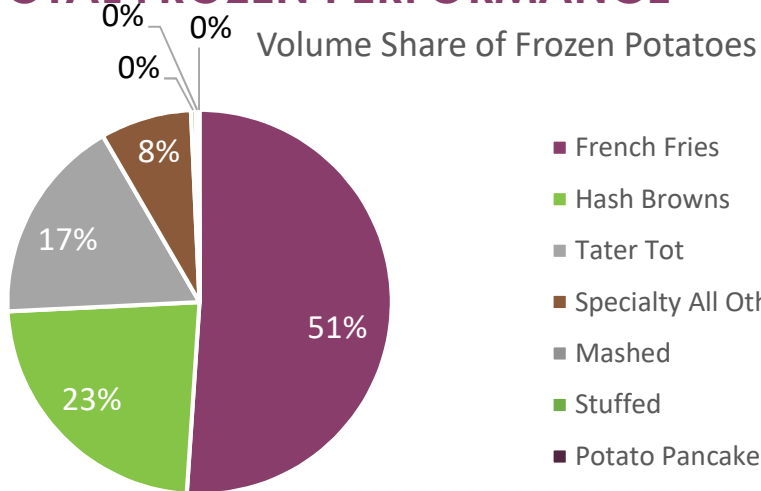
Source: Nielsen xAOC (frozen and dehydrated) \*EXCLUDES all sweet potatoes

# TOTAL STORE QUARTERLY POTATO REPORT

Quarter 2 – Data Ending 12.31.16



## TOTAL FROZEN PERFORMANCE



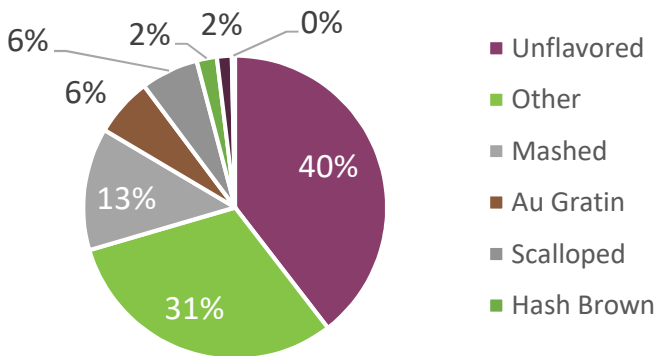
## KEY TAKEAWAYS

- Frozen Potatoes are seeing an increase in dollars by 2.9% and 1.1% in pounds compared to last year, while price per pound increased 1.7%
- French Fries, which has the highest share, are slightly up in dollars and pounds this quarter
- Frozen Mashed Potatoes are seeing the highest growth in both dollars and pounds

Frozen Potatoes Q2	Dollars	Dollars % Change	Pounds	Fresh Weight Equivalent	Pounds % Change	Price Per Pound	Price Per Pound % Change
Total Frozen Potatoes	\$ 406,211,684	2.9%	294,322,686	500,348,567	1.1%	\$ 1.38	1.7%
French Fries	\$ 197,583,855	1.1%	150,280,265	255,476,450	1.9%	\$ 1.32	-0.8%
Hash Browns	\$ 98,966,968	6.4%	68,173,529	115,894,999	-1.3%	\$ 1.45	7.8%
Mashed	\$ 2,611,174	70.9%	1,182,704	2,010,597	58.4%	\$ 2.21	7.9%
Potato Pancake	\$ 1,302,036	-4.2%	243,953	414,721	-9.4%	\$ 5.34	5.8%
Specialty All Other	\$ 40,309,437	0.7%	22,571,777	38,372,021	-4.1%	\$ 1.79	5.1%
Stuffed	\$ 2,520,489	-21.5%	734,375	1,248,437	-23.5%	\$ 3.43	2.6%
Tater Tot	\$ 62,917,726	4.5%	51,136,084	86,931,342	4.5%	\$ 1.23	0.0%

## TOTAL DEHYDRATED PERFORMANCE

Volume Share of Dehydrated Potatoes



## KEY TAKEAWAYS

- Total Dehydrated Potatoes are declining in both dollars and pounds with a slight increase in price
- The largest declines are coming from Au Gratin, Potato Pancakes, Scalloped, and Specialty Potatoes
- Hash Browns, which hold 31% of share, are performing well in dollars and pounds with a 16.5% decrease in price per pound

Dehydrated Potatoes Q2	Dollars	Dollars % Change	Pounds	Fresh Weight Equivalent	Pounds % Change	Price Per Pound	Price Per Pound % Change
Total Dehydrated Potatoes	\$ 132,984,191	-3.0%	40,932,591	245,595,548	-3.9%	\$ 3.25	0.9%
Au Gratin	\$ 10,478,273	-2.6%	2,557,957	15,347,744	-6.4%	\$ 4.10	4.0%
Hash Brown	\$ 3,326,538	13.0%	871,780	5,230,682	35.3%	\$ 3.82	-16.5%
Mashed	\$ 21,711,160	-3.0%	5,340,015	32,040,089	-3.2%	\$ 4.07	0.2%
Other	\$ 50,959,109	1.4%	12,661,252	75,967,512	2.8%	\$ 4.03	-1.3%
Potato Pancake	\$ 868,667	-9.9%	142,888	857,329	-11.9%	\$ 6.08	2.3%
Scalloped	\$ 10,240,324	-12.2%	2,517,597	15,105,579	-14.8%	\$ 4.07	3.2%
Specialty	\$ 2,616,580	-25.5%	652,654	3,915,922	-27.9%	\$ 4.01	3.4%
Unflavored	\$ 32,783,541	-5.4%	16,188,449	97,130,692	-6.7%	\$ 2.03	1.5%

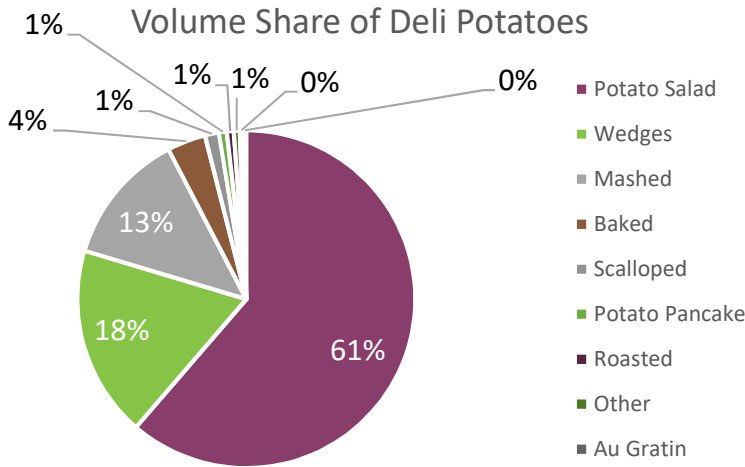
Source: Nielsen Perishables Group FreshFacts® (Fresh, deli and refrigerated)  
 Source: Nielsen xAOC (frozen and dehydrated) \*EXCLUDES all sweet potatoes

# TOTAL STORE QUARTERLY POTATO REPORT

## Quarter 2 – Data Ending 12.31.16



### TOTAL DELI PERFORMANCE



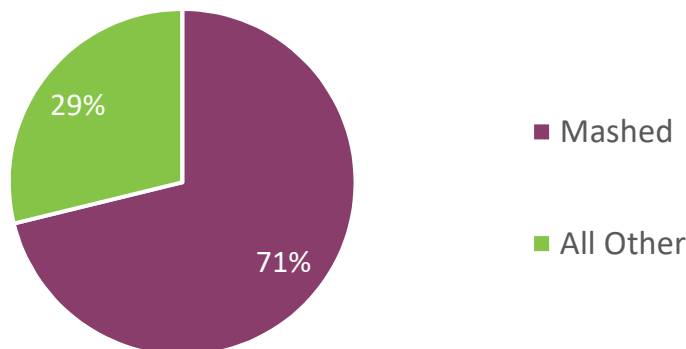
### KEY TAKEAWAYS

- Total Deli Potatoes is increasing in dollars and pounds
- Potato Salad, Mashed, Wedges & Baked are contributing to the Total Deli Potato increase with an increase in both dollars and pounds sales

Deli Potatoes Q2	Dollars	Dollars % Change	Pounds	Pounds % Change	Price Per Pound	Price Per Pound % Change
Total Deli Potatoes	\$ 137,440,853	2.7%	38,643,163	1.8%	\$ 3.56	0.8%
Potato Salad	\$ 86,203,363	3.5%	23,693,383	0.5%	\$ 3.64	3.0%
Potato Pancake	\$ 781,940	-4.6%	292,650	-7.3%	\$ 2.67	2.8%
Roasted	\$ 1,116,659	-1.5%	250,235	1.6%	\$ 4.46	-3.0%
Other	\$ 1,038,234	-8.1%	224,458	-8.2%	\$ 4.63	0.1%
Wedges	\$ 22,611,257	8.3%	7,083,068	7.7%	\$ 3.19	0.6%
Baked	\$ 4,472,235	0.7%	1,426,828	20.7%	\$ 3.13	-16.6%
Au Gratin	\$ 504,801	-45.6%	125,546	-44.4%	\$ 4.02	-2.2%
Scalloped	\$ 3,143,475	-15.4%	517,225	-19.2%	\$ 6.08	4.7%
French Fries/ Tots	\$ 322,253	-26.5%	111,440	-27.9%	\$ 2.89	1.8%
Mashed	\$ 17,246,636	0.9%	4,918,329	2.6%	\$ 3.51	-1.7%

### TOTAL REFRIGERATED PERFORMANCE

Volume Share of Refrigerated Potatoes



### KEY TAKEAWAYS

- Refrigerated Potatoes are performing well with an increase in dollars and pounds
- Mashed Potatoes account for most of the share of Refrigerated Potatoes and are growing in both dollars and pounds

Refridgerated Potatoes Q2	Dollars	Dollars % Change	Pounds	Fresh Weight Equivalent	Pounds % Change	Price Per Pound	Price Per Pound % Change
Total Refridgerated Potatoes	\$95,170,549	8.8%	31,420,011	62,840,021	7.2%	\$3.03	1.5%
Mashed	\$70,935,023	9.6%	22,364,157	44,728,314	10.1%	\$3.17	-0.4%
All Other	\$24,235,526	6.6%	9,055,854	18,111,707	0.8%	\$2.68	5.8%

Source: Nielsen Perishables Group FreshFacts® (Fresh, deli and refrigerated)  
 Source: Nielsen xAOC (frozen and dehydrated) \*EXCLUDES all sweet potatoes