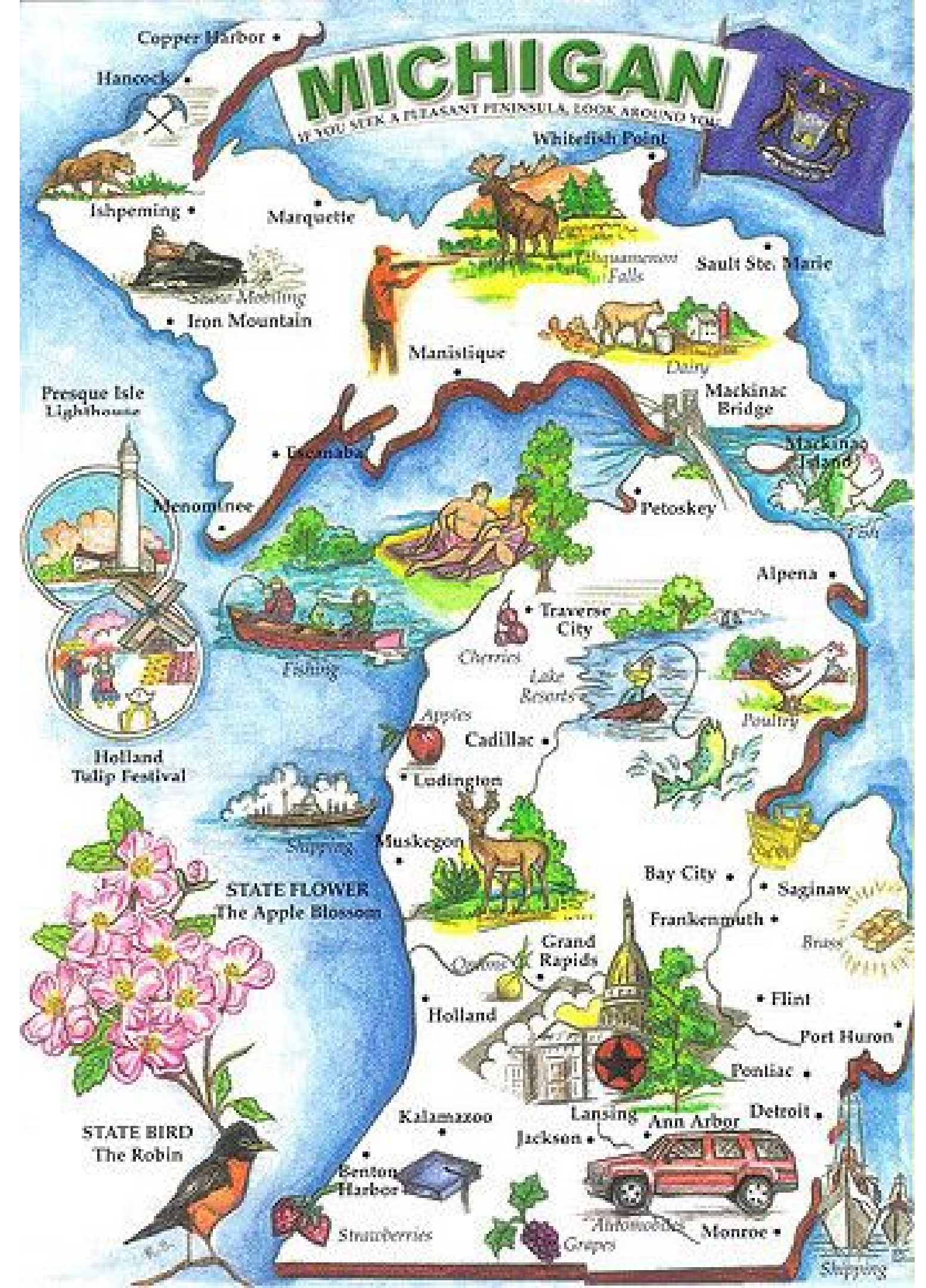


Potato Market Update

February 2023

Blair Richardson
CEO/President



A Year in Review

Market
Update

Retail

Reputation
Management

Culinary



MARKET UPDATE

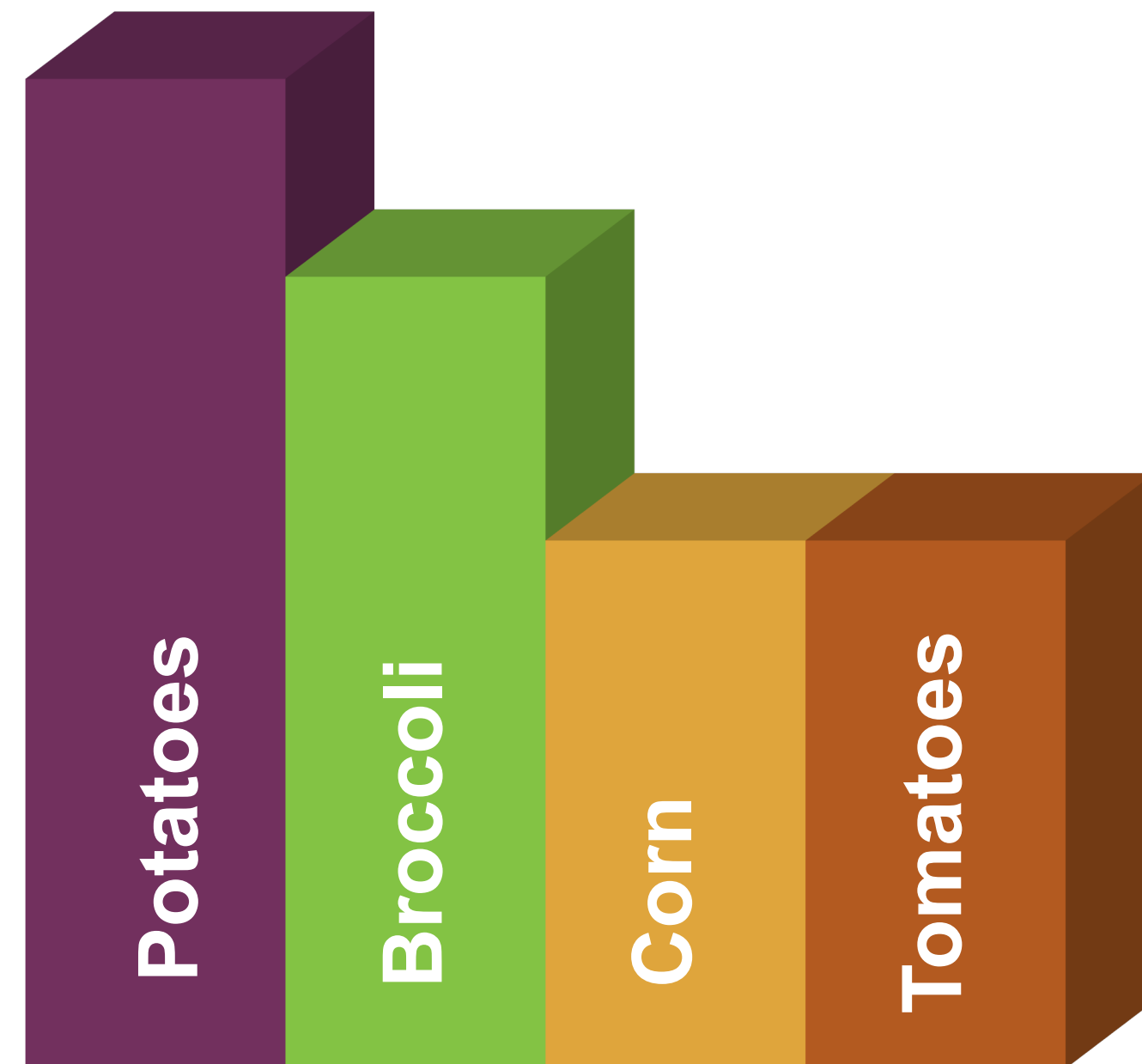
—
DOMESTIC





**Demand is
Strong**









5-year Volume Sales Trends

Strong Potato Sales in the U.S.



**Sales Compared to
Last Year**

+9%

-3%

+12%

**Sales Compared to
5 years ago**

+28%

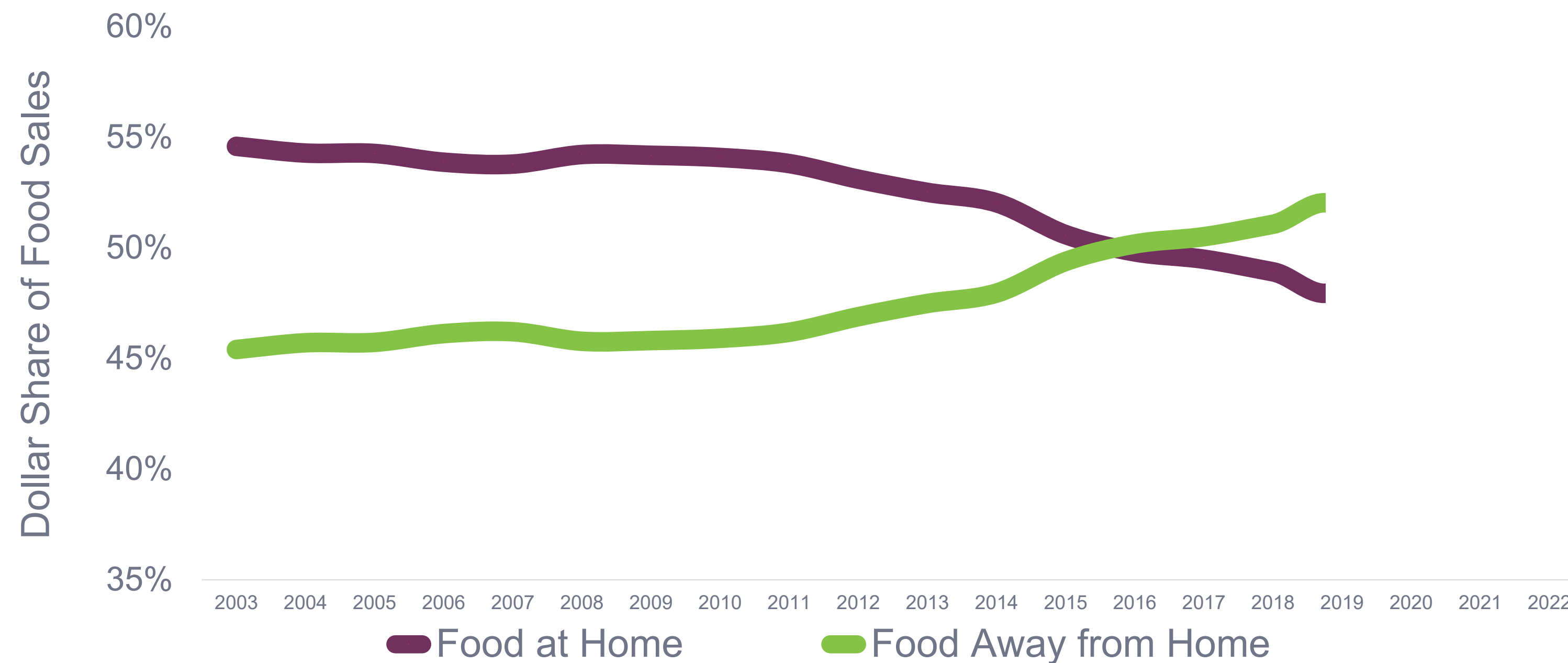
+6%

-9%



2003 – August 2022

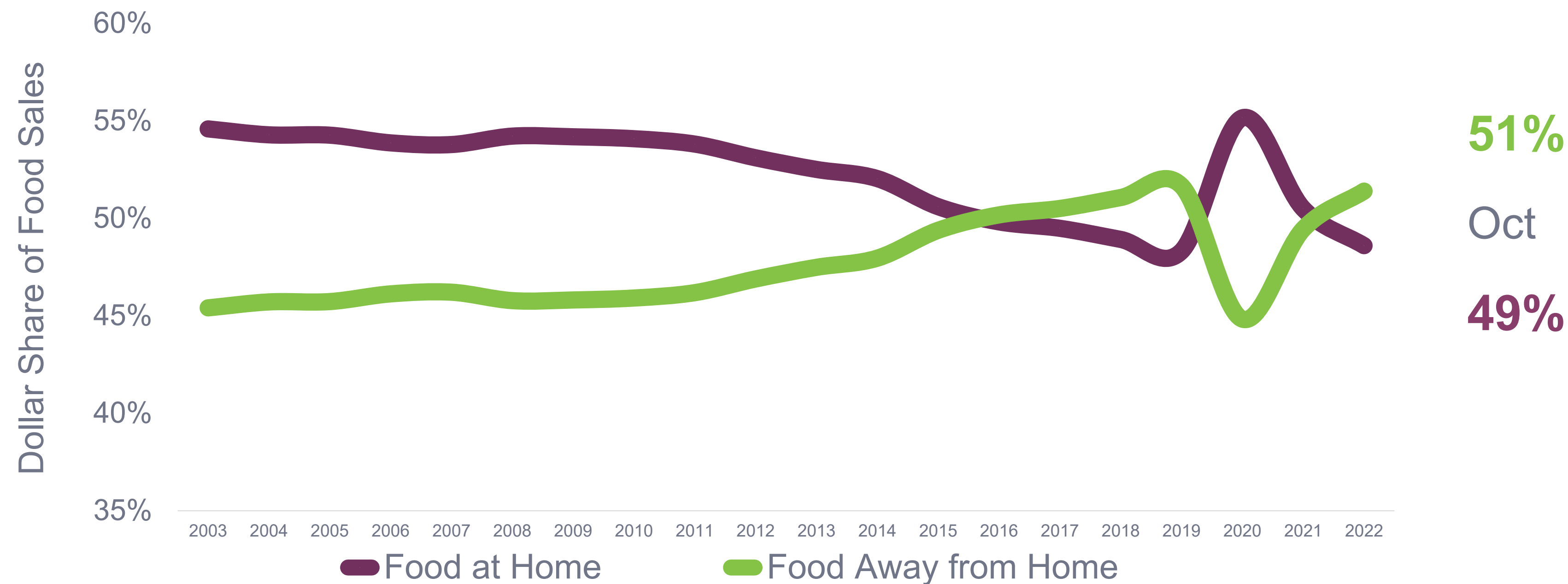
Changes in Food Spending





2003 – August 2022

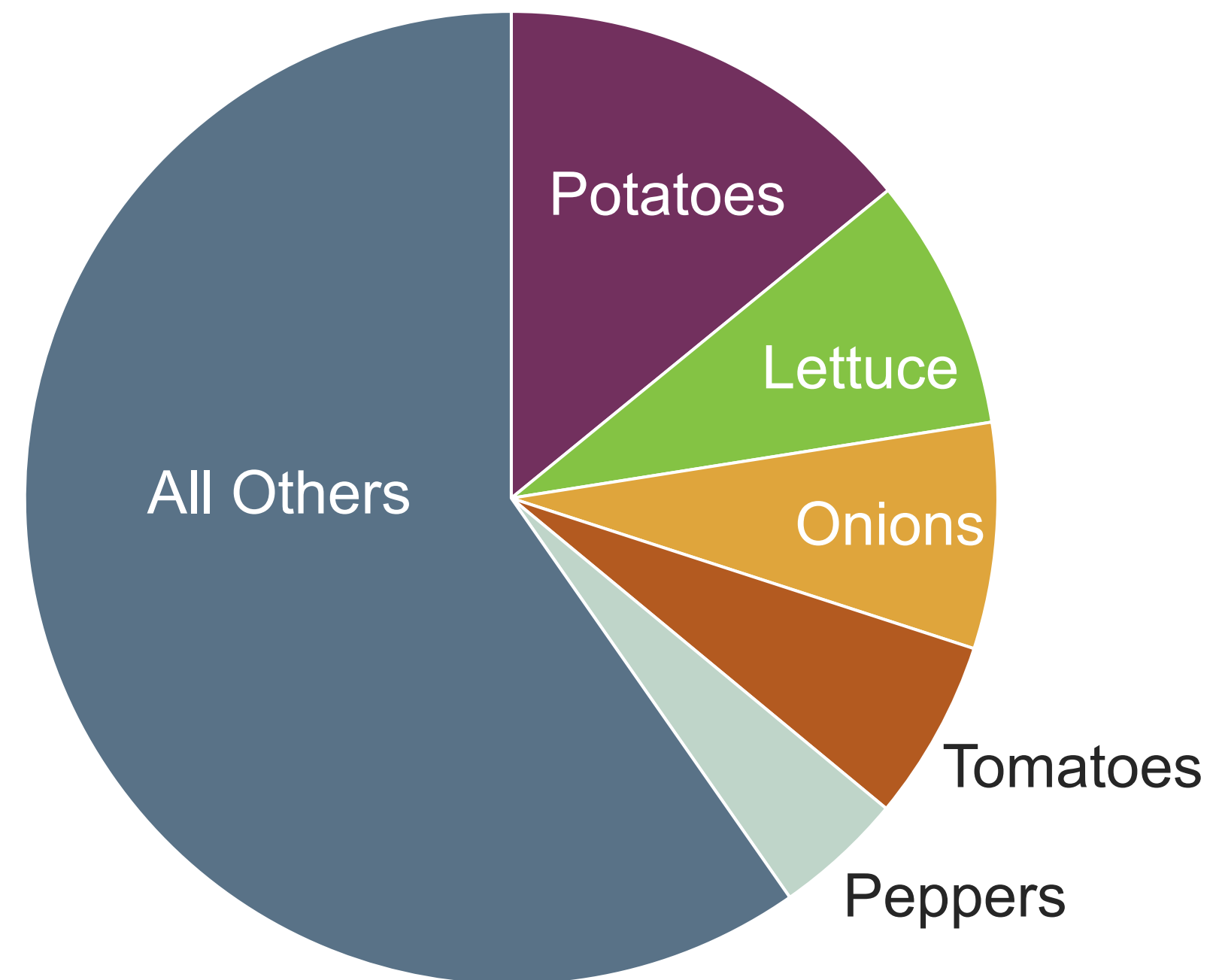
Changes in Food Spending



RETAIL SALES

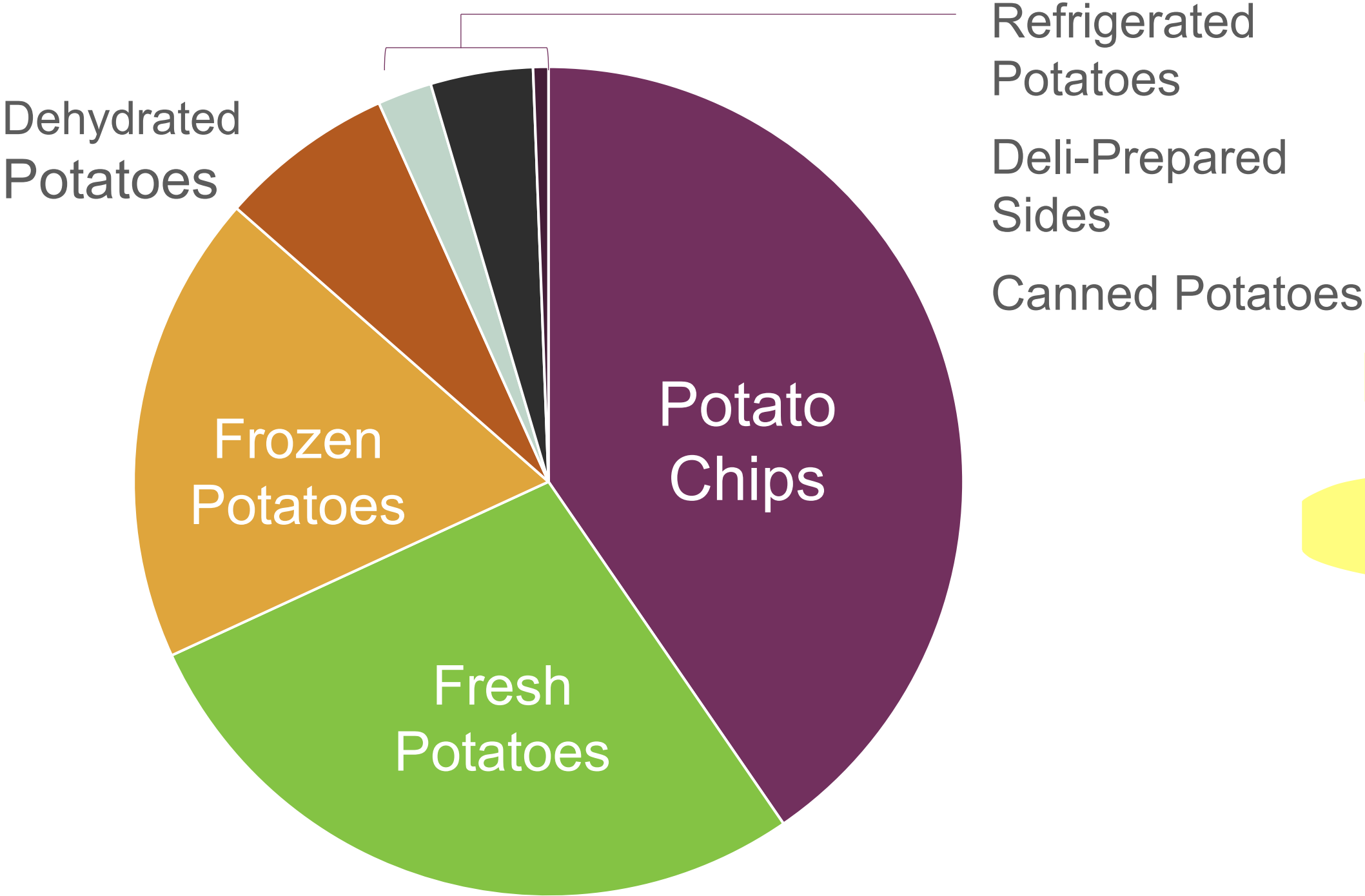
WHAT ARE CONSUMERS BUYING?

#1 Vegetable Sold at Retail



July-June 2022

Retail Sales by Category FWE



	YOY	Pre-pandemic
Chips	-2.0%	1.3%
Fresh	-5.6%	0.3%
Frozen	-4.3%	15.4%
Dehy	-1.3%	13.7%
Refrig	-1.4%	13.4%
Deli	-1.6%	-8.6%
Canned	-4.5%	0.4%



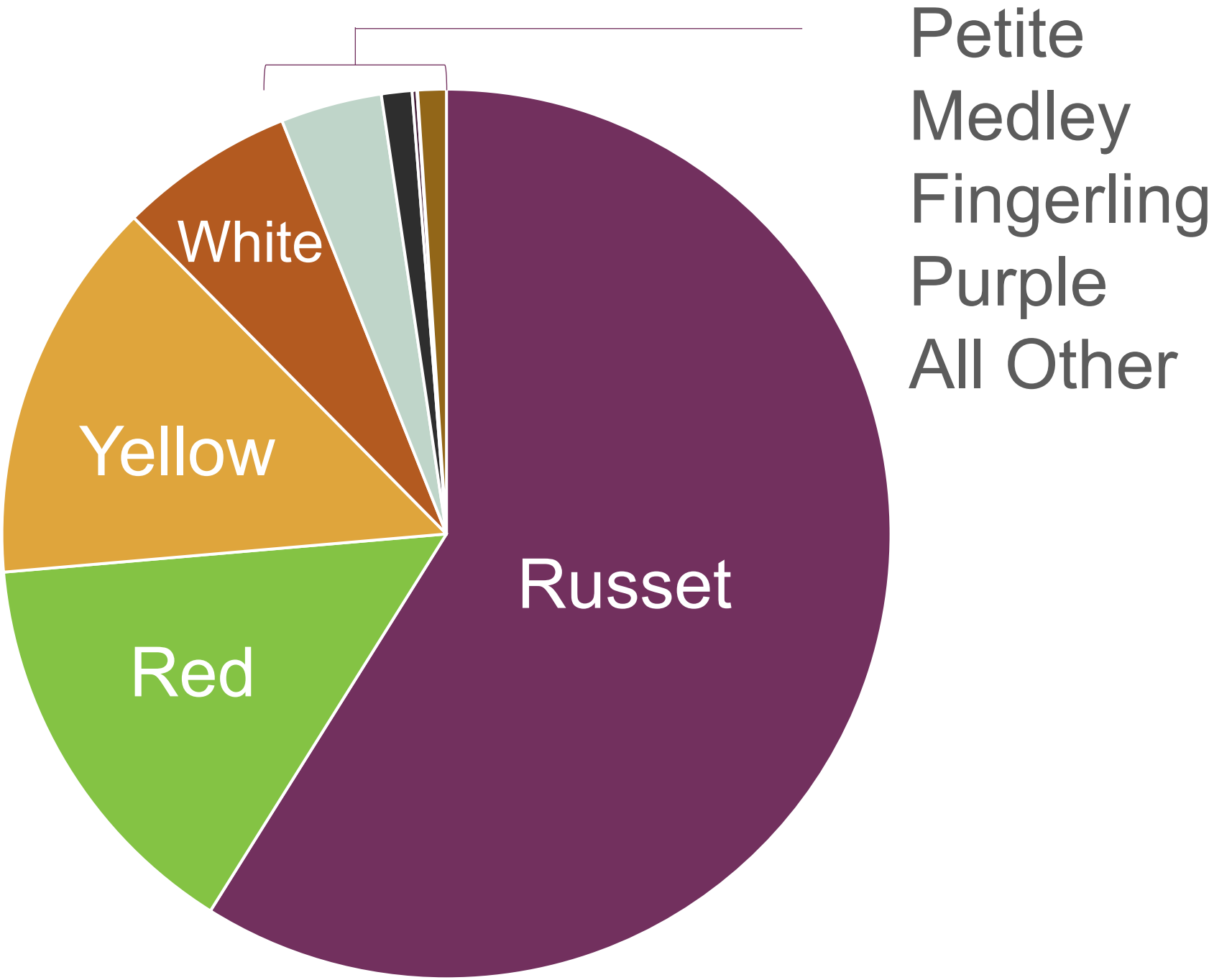
CHIPS

Remember: This is a Snack!



July-June 2022

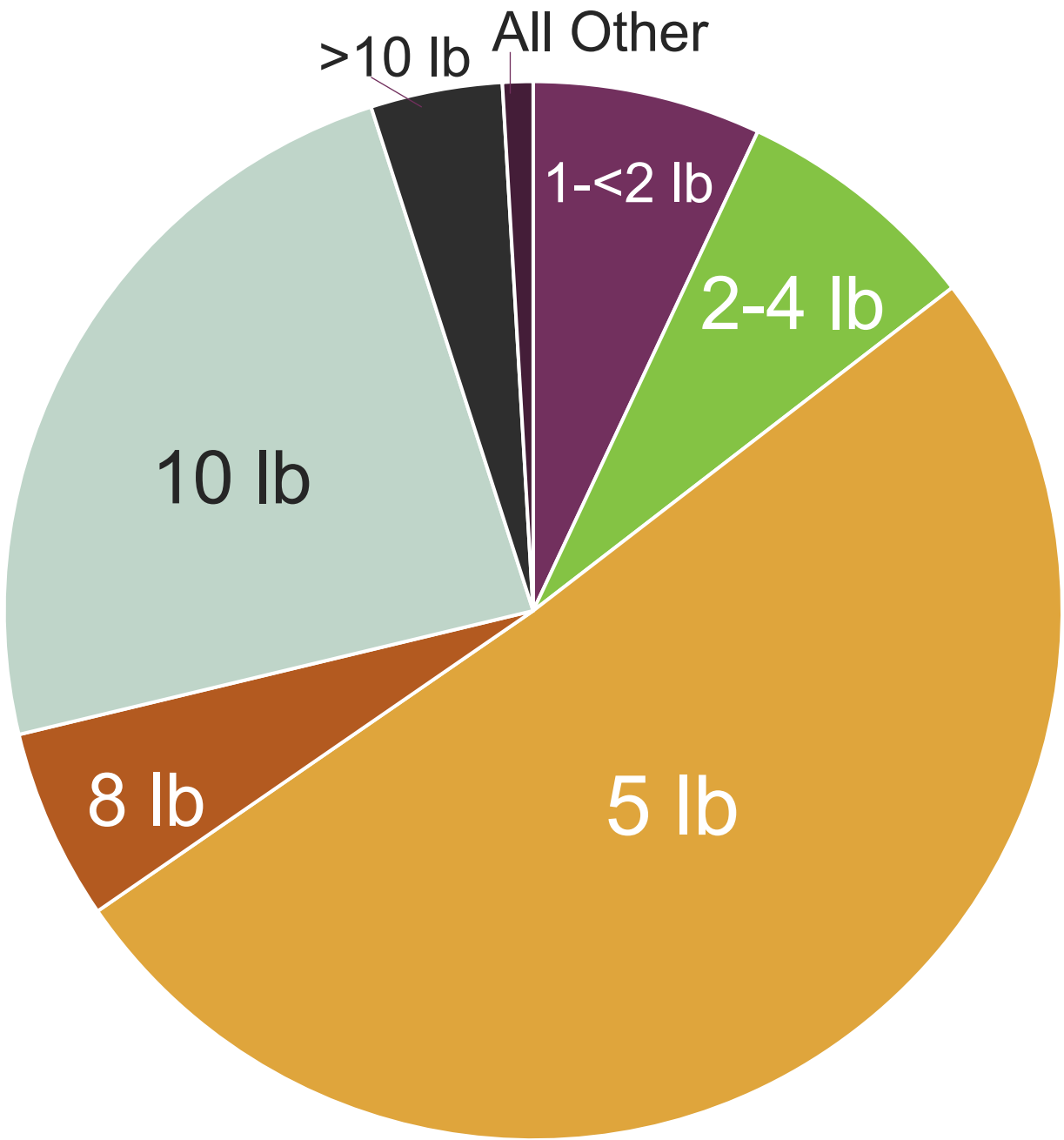
Retail Sales by Fresh Volume Share



	YOY	Pre-pandemic
Russet	-7.8%	-4.2%
Red	-5.5%	-11.1%
Yellow	4.6%	27.4%
White	-5.8%	-1.6%
Petite	-1.6%	47.4%
Medley	-2.2%	59.2%
Fingerling	-5.1%	-4.5%
Purple	-28.5%	-29.3%
All Other	-11.8%	40.4%

July-June 2022

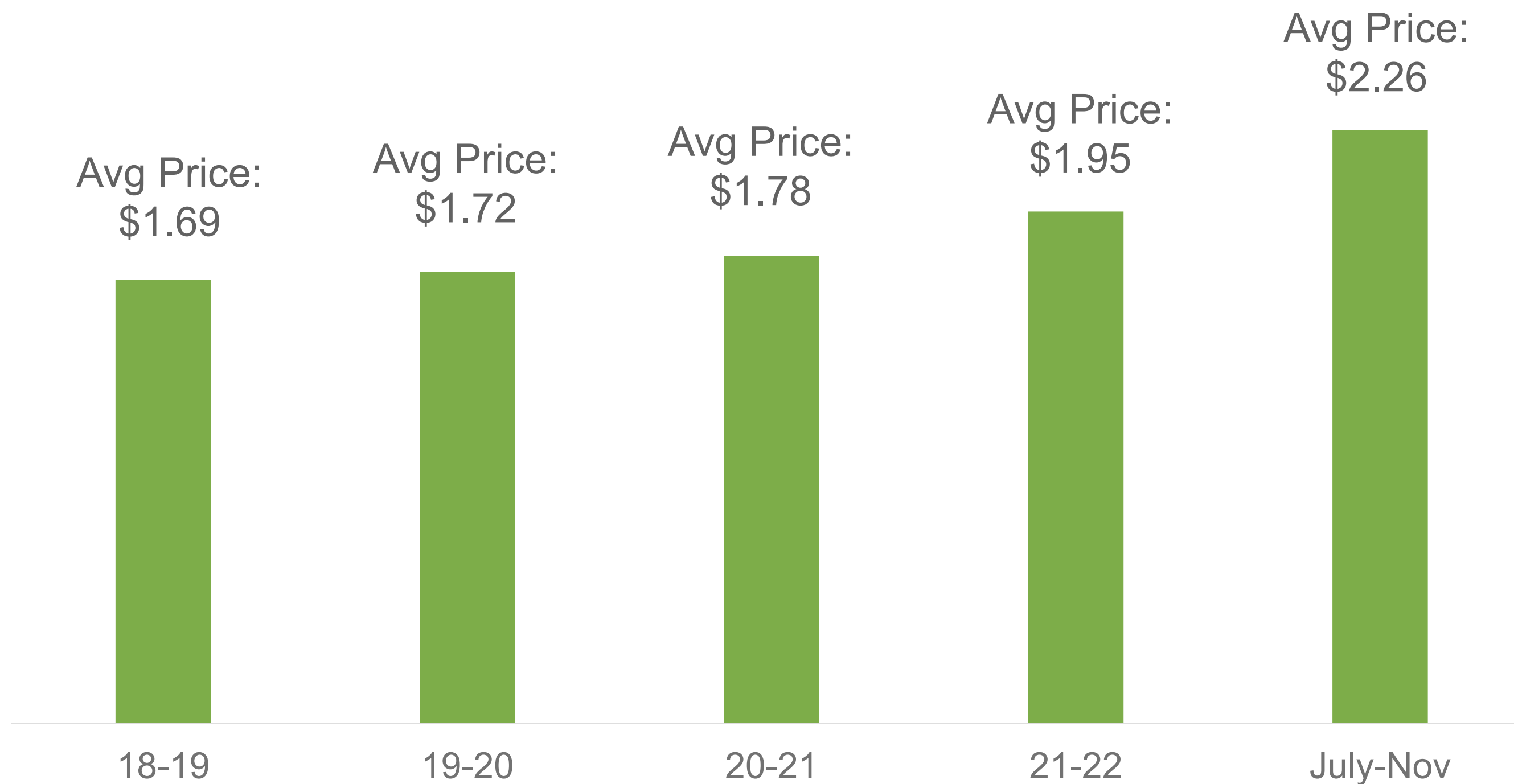
Retail Sales by Fresh Pack Size Volume Share



	YOY	Pre-pandemic
1-<2 lbs.	2.4%	39.7%
2-4 lbs.	-6.4%	4.1%
5 lbs.	-1.2%	2.0%
8 lbs.	-6.8%	-2.7%
10 lbs.	-10.5%	-7.9%
>10 lbs.	-12.8%	1.5%
All Other	-8.0%	-0.7%



2018-Current **Average Consumer Price**



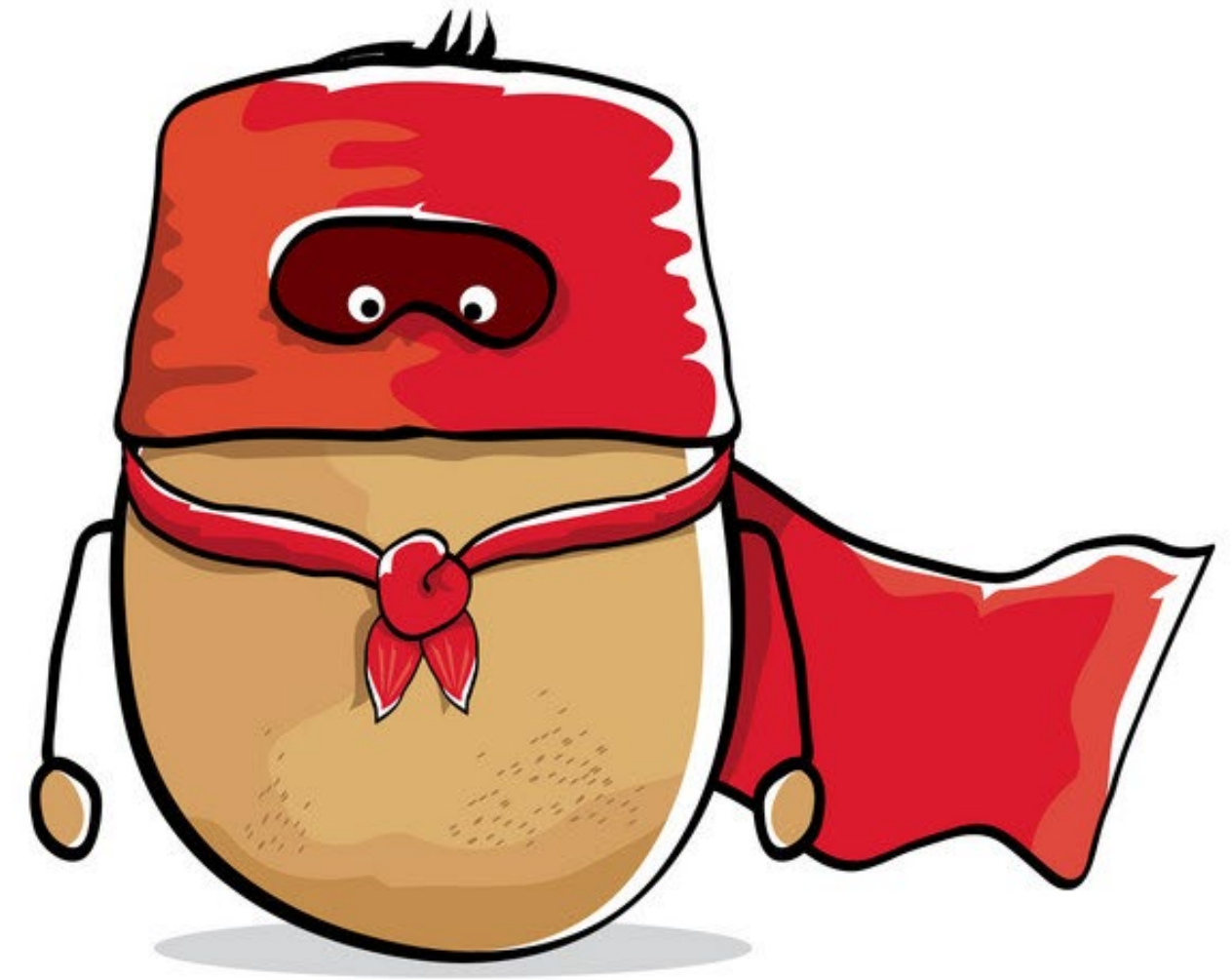
REPUTATION MANAGEMENT



Reputation Management

What we do

- ✓ Respond everywhere to inaccurate portrayals of potatoes
- ✓ Activate the network on big issues
- ✓ Amplify influential voices
- ✓ Build relationships
- ✓ Proactively communicate



SUPER
POTATO



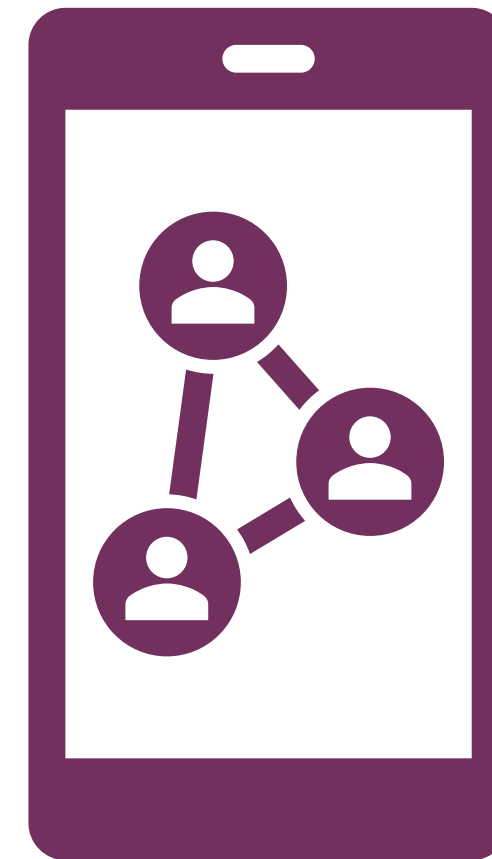
Positive-to-Negative

Potato Media Coverage



Traditional Media

3:1



Social Media

13:1



Potatoes[®]
USA

2022

Outreach to 28 Media Outlets

39% Correction Rate

REALSIMPLE



Parade

LIVESTRONG[™].COM

GOOD
HOUSEKEEPING

Eat This, Not That!

HEALTHY EATING

✓ Expert-Recommended

20 Easy Ways To Make Every Meal More Nutritious

Make every carb and calorie count with these tips for packing vitamins and minerals into every bite.



HEALTHY EATING

✓ Expert-Recommended

19 Easy Ways To Make Every Meal More Nutritious

Make every carb and calorie count with these tips for packing vitamins and minerals into every bite.

A large, thick purple 'X' mark, indicating a recommendation or tip.

Choose sweet over white once a week.

If you eat potatoes as a side dish often, try swapping white potatoes out for sweet potatoes. One large, sweet potato contains around 4 grams of satiety-boosting protein, 25 percent of the day's belly-filling fiber, and 11 times the recommended daily intake of vitamin A. Also, sweet potatoes tend to contain about 50 fewer calories than white spuds of the same size. For more, read [One Major Effect of Eating Sweet Potatoes, Says Dietitian](#).

Original

What Are Antioxidants and Why Do We Need Them?

Experts say plant foods, not supplements, are the best way to reap antioxidant benefits.

“Many of the antioxidants themselves are the plant pigments that make them such bright colors,” says Dr. Michael Greger, founder of NutritionFacts.org and a member of the [U.S. News Best Diets](#) expert panel. “The same biochemical property that gives them those beautiful colors is actually the same property that allows them to detox free radicals.”

You can see for yourself which foods are richest in pigment, Greger says, like the difference between white and [sweet potatoes](#). Red cabbage has more pigment than regular cabbage, red onions have more than white onions, purple grapes are better than green grapes and so forth. Even black sesame seeds are richer in antioxidants compared to the regular version, he says.

Updated

What Are Antioxidants and Why Do We Need Them?

Experts say plant foods, not supplements, are the best way to reap antioxidant benefits.

However, pigmentation alone is only part of the picture, at least when it comes to potatoes, says Katherine Beals, a registered dietitian and nutrition consultant for Potatoes USA. Several studies and [reviews](#) support the rich antioxidant benefits of white potatoes, notes Beals, who is also a U.S. News [Best Diets panelist](#). White potatoes exceed sweet potatoes in total antioxidant content, and contribute a significant portion of specific antioxidants in the flavonoid, phenolic acid and carotenoid types, evidence shows. Beals adds that “eating a rainbow” of colors should also include white vegetables like potatoes and [cauliflower](#).



Potatoes[®]
USA

Reputation Management

External Influences

- White House Summit
- Dietary Guidelines for Americans
- FDA Definition of “Healthy”
- Eat Lancet 2.0
- CIA Menus of Change



MENUS^{of} CHANGE[®]

PRINCIPLES

OF HEALTHY, SUSTAINABLE MENUS

MENUS CHANGE
The Business of Healthy, Sustainable, Delicious Food Choices



HARVARD
T.H. CHAN

SCHOOL OF PUBLIC HEALTH
Department of Nutrition

BE **TRANSPARENT** ABOUT SOURCING AND PREPARATION

BUY



**REWARD
BETTER
AGRICULTURAL
PRACTICES**

LEVERAGE **GLOBALLY INSPIRED,
PLANT-FORWARD**
CULINARY STRATEGIES

FOCUS ON **WHOLE, MINIMALLY PROCESSED** FOODS

**GROW
EVERYDAY
OPTIONS,**
WHILE HONORING SPECIAL
OCCASION TRADITIONS

**CELEBRATE
CULTURAL
DIVERSITY
& DISCOVERY**

— LEAD WITH —
**MENU
MESSAGING
AROUND
FLAVOR**

REDUCE PORTIONS,
EMPHASIZING
CALORIE QUALITY
OVER QUANTITY

DESIGN HEALTH AND
SUSTAINABILITY INTO
OPERATIONS
AND DINING
SPACES



MAKE **WHOLE, INTACT
GRAINS** THE NEW NORM

LIMIT POTATOES

**MOVE LEGUMES AND NUTS
TO THE CENTER OF THE PLATE**



CHOOSE
**HEALTHIER
OILS**



GO **"GOOD FAT,"** NOT **"LOW FAT"**

SERVE MORE KINDS OF
**SEAFOOD,
MORE OFTEN**



**REIMAGINE DAIRY
IN A SUPPORTING ROLE**



**USE POULTRY
AND EGGS IN
MODERATION**

**REDUCE ADDED
SUGAR**



**CUT THE
SALT:**
RETHINK FLAVOR
DEVELOPMENT
FROM THE GROUND UP

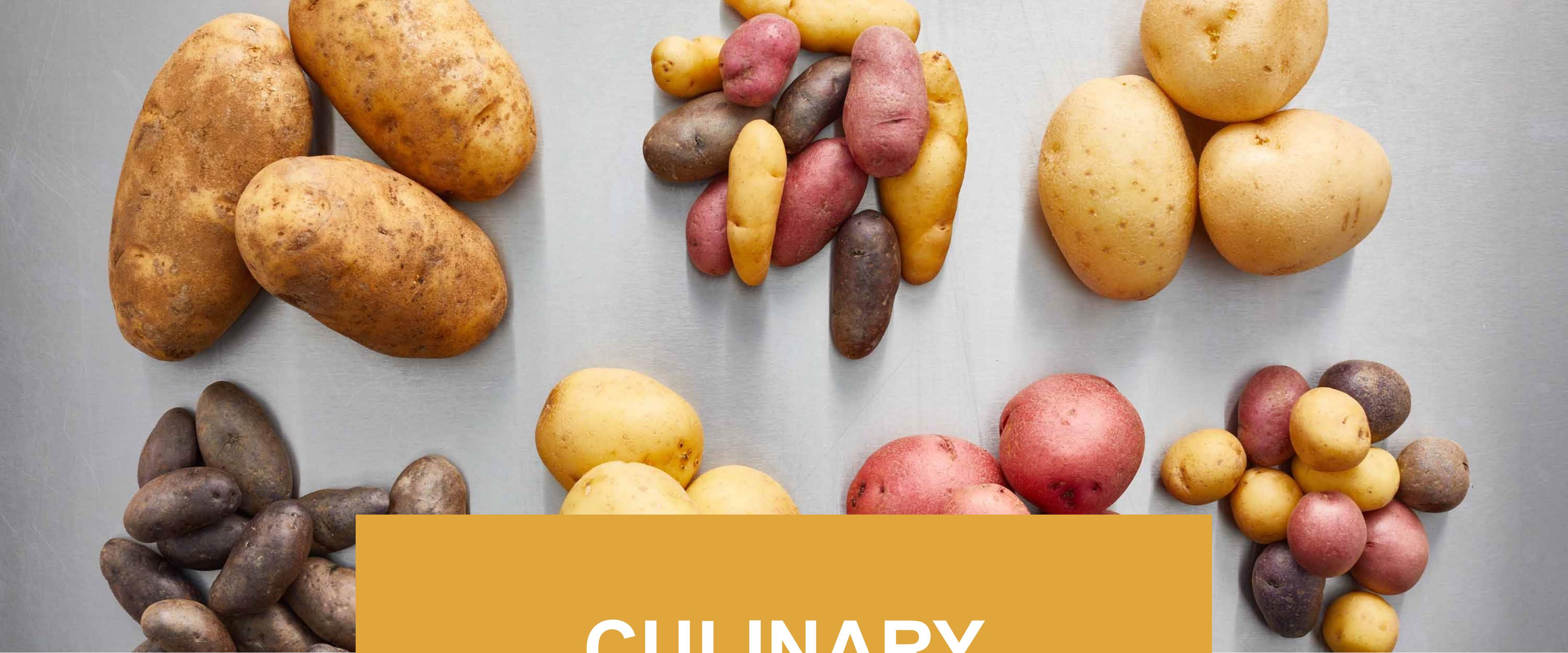


— **SERVE LESS** —
**RED MEAT,
LESS OFTEN**

SUBSTANTIALLY REDUCE SUGARY BEVERAGES,
INNOVATE REPLACEMENTS

DRINK HEALTHY:
FROM WATER, COFFEE, AND TEA TO
(WITH CAVEATS) BEVERAGE ALCOHOL





CULINARY





Potatoes[®]
USA



VIDEO



RESOURCES

Market Research

**U.S Potato
Sales & Utilization**

Retail Sales

**Foodservice Sales
Volume**

Potato Menu Trends

**Consumer
Attitudes & Usage**

**Retail Merchandising Best
Practices**

Patron Study

Retail Path to Purchase



PotatoesUSA.com

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STRENGTHENING DEMAND FOR U.S. POTATOES

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REPORTS

03
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PotatoGoodness.com

RecipesHow to Cook PotatoesPotato BasicsNutritionCommunityProfessionals

All About Potatoes

Breakfast, lunch, or dinner. It's potatoes all the time around here!

POTATO RECIPES

Leek & Bacon Loaded Potato Soup

Air Fryer Potatoes with Green Goddess Dip



Potatoes[®]
USA

Leveraging the Efforts of Potatoes USA

International Outreach





Potatoes[®]
USA



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