

2019 U.S. SALES AND UTILIZATION REPORT



HIGHLIGHTS

TOTAL U.S. POTATO UTILIZATION IN 2019

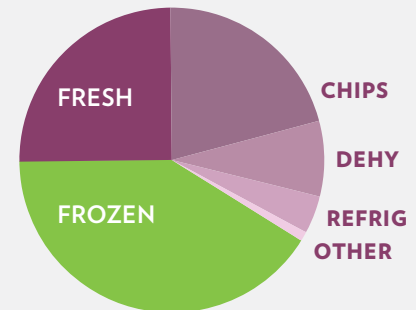
(Fresh Weight Equivalent)

14,808	+	20,586	+	7,588	-	5,970	=	37,012
Retail		Foodservice		Exports		Imports		Total Utilization
+0.7% YOY		+1.2% YOY		+8.8% YOY		-3.4% YOY		+3.3% YOY

SHARE OF TOTAL UTILIZATION BY PRODUCT

2019 MILLIONS OF POUNDS (Fresh Weight Equivalent)

41%	25%	21%	8%	4%	1%
Frozen	Fresh	Chips	Dehy	Refrig	Other



RETAIL VS. FOODSERVICE CHANNEL SALES

2019 Millions of Pounds



SALES BY PRODUCT AND CHANNEL

(Fresh Weight Equivalent)

Product	Retail	YOY	Foodservice	YOY
Fresh	4,583	-1.0%	4,296	-1.8%
Chips	6,037	+1.1%	1,488	-1.6%
Dehydrated	880	+0.4%	1,283	-1.0%
Frozen	2,174	+4.0%	12,746	+2.7%
Refrigerated	516	+4.6%	774	+4.6%
RTE	284	-3.1%	n/a	n/a
Canned	88	-3.2%	n/a	n/a
Focus Category	246	-2.8%	n/a	n/a
Total	14,808	+0.7%	20,586	+1.2%



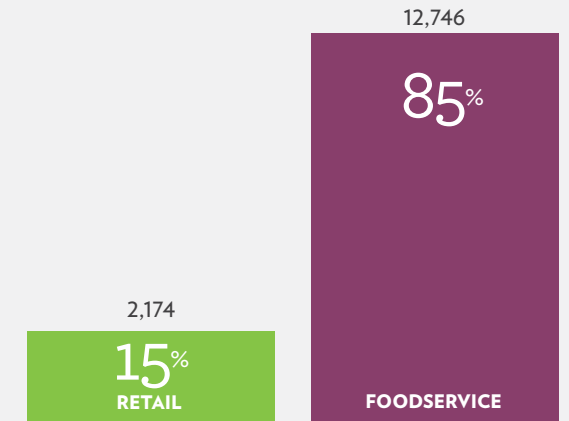
KEY FINDINGS



FROZEN SALES

BY CHANNEL AND FOODSERVICE SEGMENT

2019 Millions of Pounds



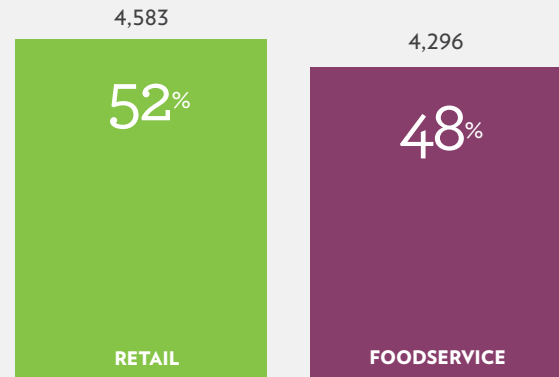
Total Frozen: 14,920



FRESH SALES

BY CHANNEL AND FOODSERVICE SEGMENT

2019 Millions of Pounds



Total Fresh: 8,879



RETAIL SALES TRENDS BY PRODUCT

PRODUCT	CAGR 3yr	CAGR 5yr
Chips	0.8%	0.4%
Fresh	-2.1%	-1.7%
Frozen	3.1%	1.9%
Dehy	1.1%	-0.5%
Refrigerated	5.2%	5.2%
Ready To Eat	-0.7%	0.2%
Canned	-1.6%	-1.2%
Totals	0.3%	0.0%



FOODSERVICE SALES TRENDS BY PRODUCT

PRODUCT	CAGR 3yr	CAGR 5yr
Frozen	0.9%	1.4%
Fresh	-0.7%	0.2%
Chips	-1.6%	-3.1%
Dehy	-0.9%	6.7%
Refrigerated	3.0%	8.7%
Totals	0.3%	1.3%

1. 2019 Technomic Volumetric Study, "2019 Volumetric Assessment of the Foodservice Potato Market"

2. IRI Retail Sales data: Total US - MULO for periods ending December 31, 2019

3. Nielsen Retail Sales data: Total US xAOC for periods ending October 5, 2019 (only for "Focus Category / Product Composition Analysis" data)

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