



# The Changing Marketplace

Trends, Challenges, and Opportunities

January 9, 2025



**STRENGTHEN DEMAND  
FOR POTATOES**

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FOR POTATOES



Research



Culinary



Reputation  
Management



Retail



Nutrition &  
Health



Consumer



Foodservice

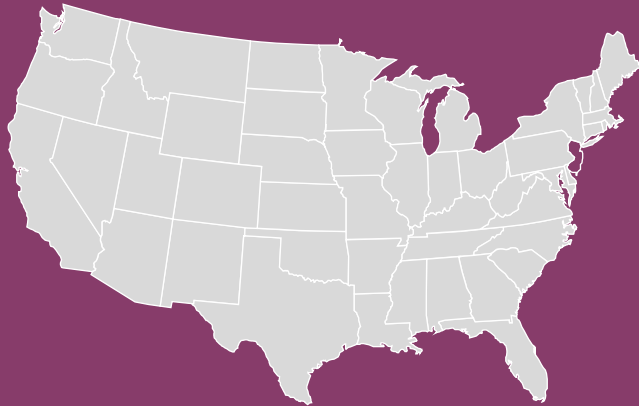


Communications

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# Programs in 23 Countries

United States



Mexico &  
Central America



Asia &  
Middle East





## BRINGING **AMERICA'S FAVORITE** **VEGETABLE** TO THE TABLE



Potatoes  
USA

**POTATOES** USA



NATIONAL  
**POTATO**  
COUNCIL

**THE NATIONAL**  
POTATO COUNCIL



**STATE**  
**COMMISSIONS**  
AND BOARDS



**POTATO**  
**SUSTAINABILITY**  
ALLIANCE



**AFFILIATED**  
**POTATO**  
INDUSTRY  
ORGANIZATIONS

# Global Marketplace



Potatoes<sup>®</sup>  
USA

# Growth in World Potato Trade



**Global potato production has experienced steady growth over the past decade**

- Fueled by China, EU-27, India, U.S, Ukraine & Russia
- Collectively account for 70% of global output

# Growth in World Potato Trade

A view to 2030



**Global production is expected to rise due**

- Growth will be driven by China and India



# Growth in World Potato Trade

A view to 2030



**Global demand is expected to remain strong**

- Population growth

# Growth in World Potato Trade

A view to 2030



**Accelerated urbanization prefer convenient, ready to eat lifestyle**

- Urbanization
- Rising preference for convenience foods

# Growth in World Potato Trade

A view to 2030

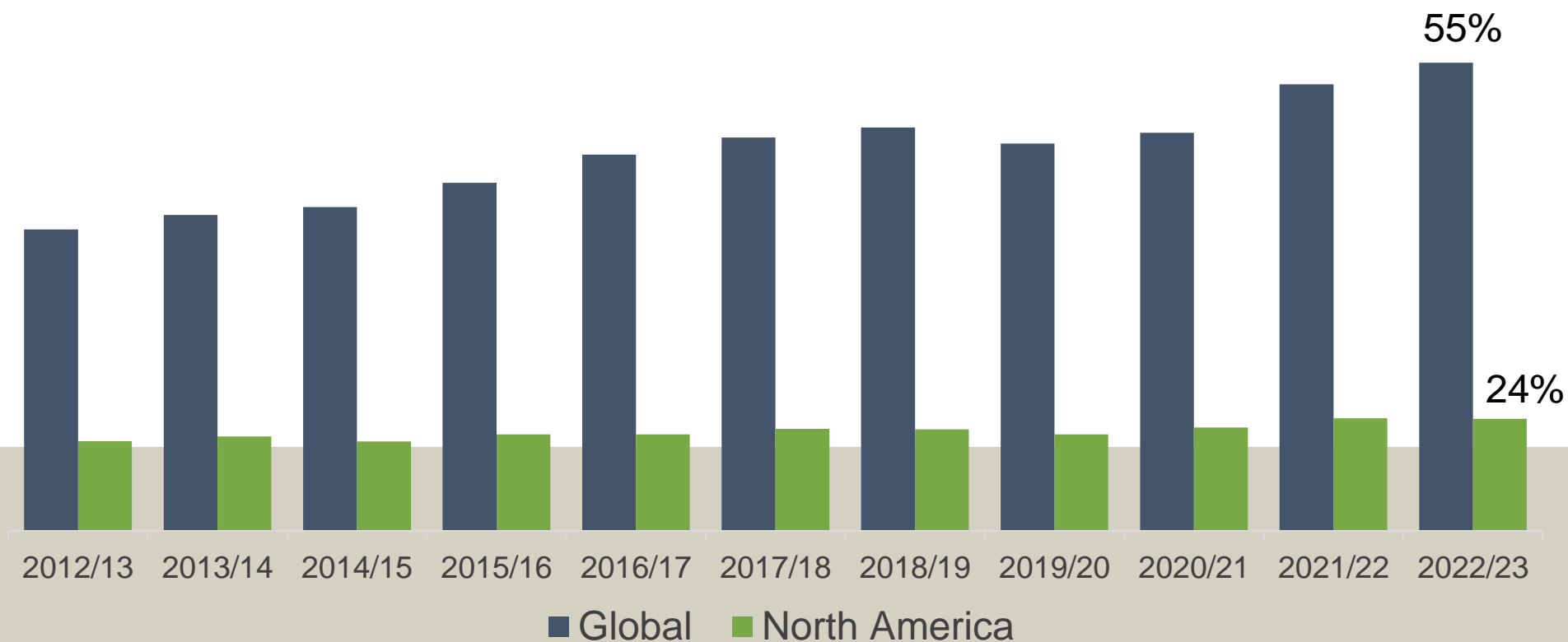


**Younger consumers are receptive to globalized eating habits**

- Dietary changes

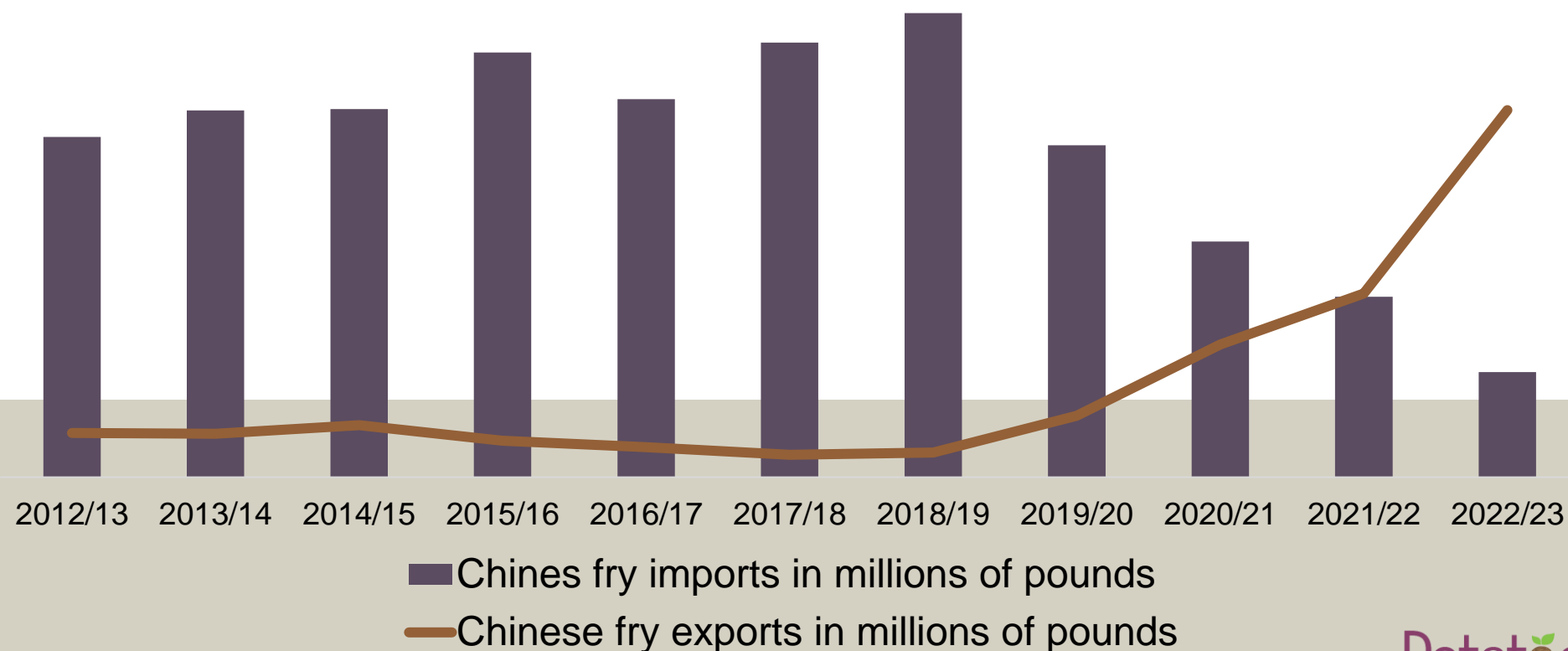
# 55% Increase in Global Exports

Of Frozen Potatoes in Last 10 years



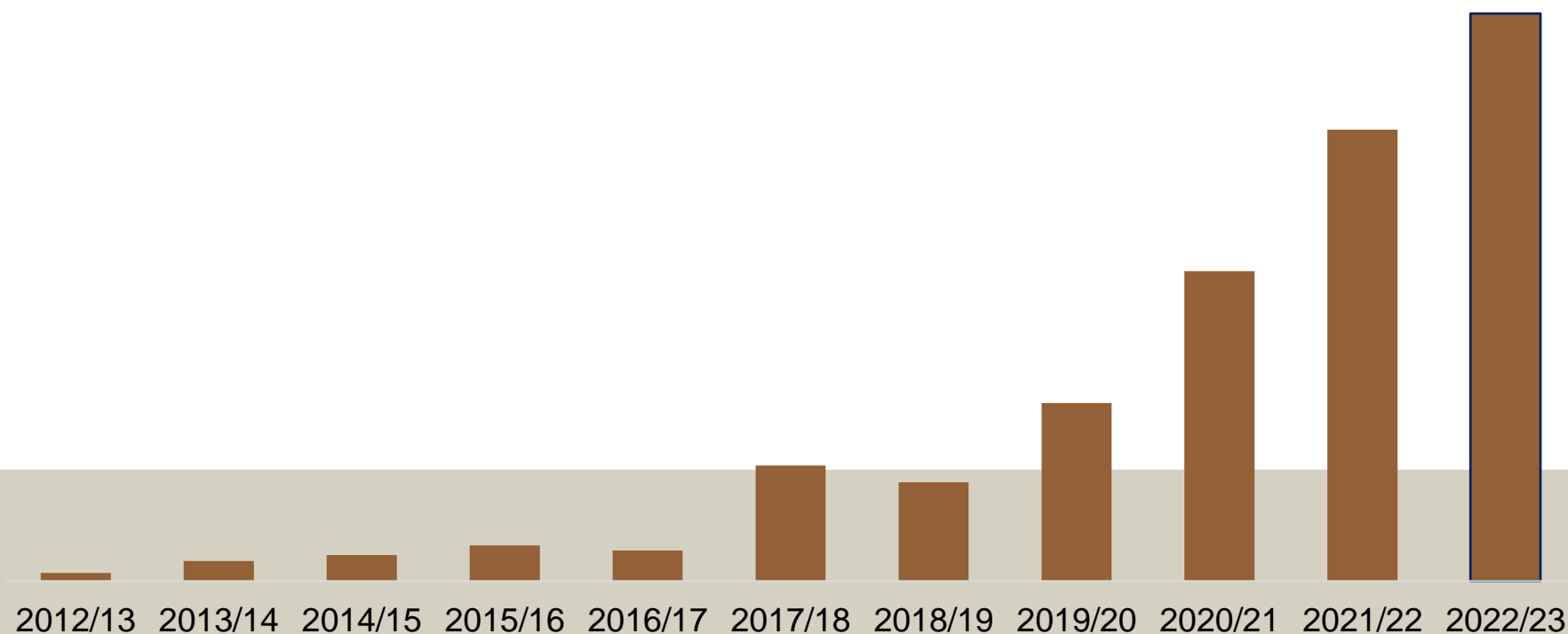
# Chinese Fry Trade

Export: \$284M USD



# India Fry Exports

Exports: \$208M USD

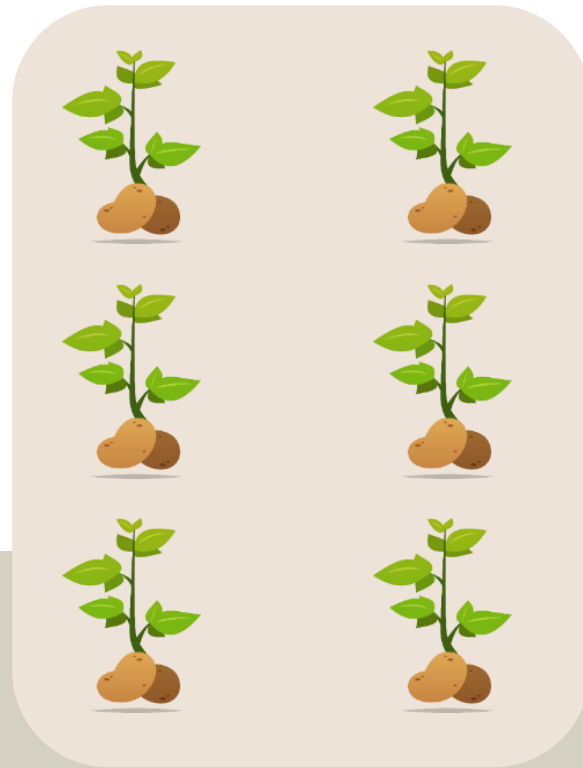




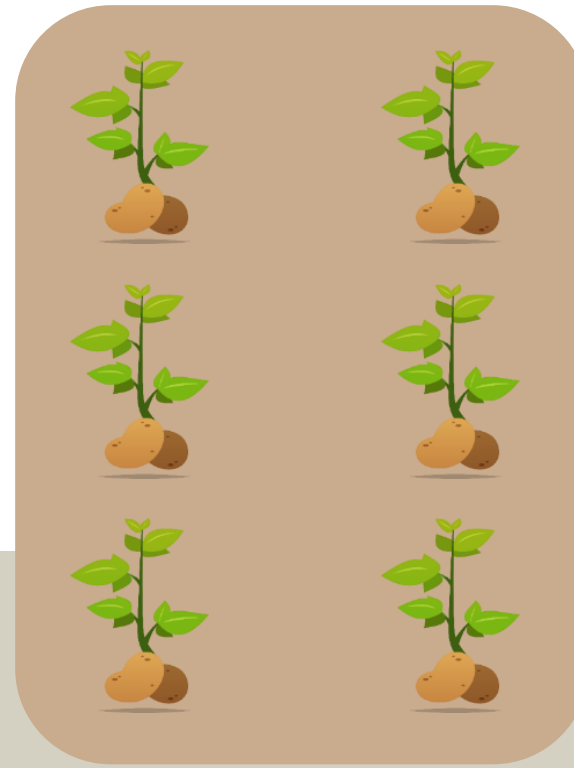
# Domestic Marketplace

# U.S. Crop Distribution

Foodservice



Retail



Exports

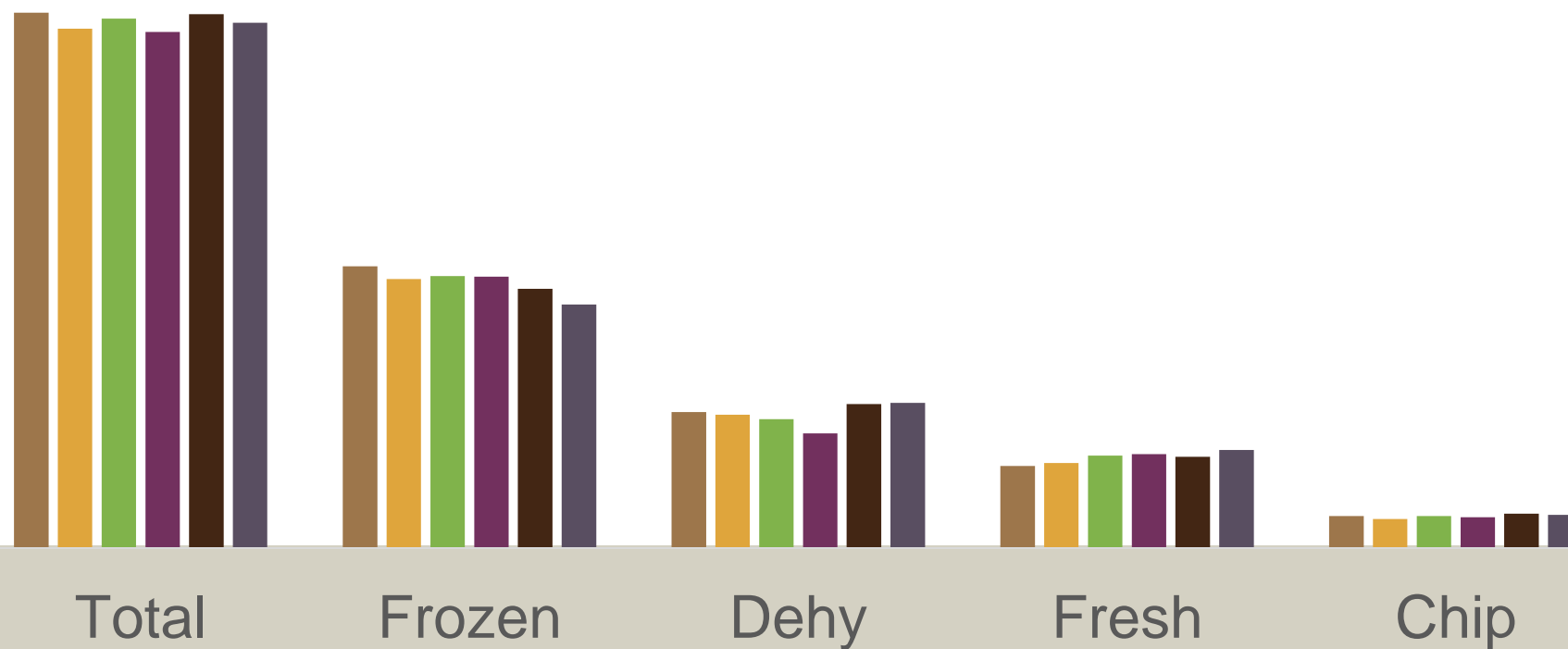




# U.S. Exports



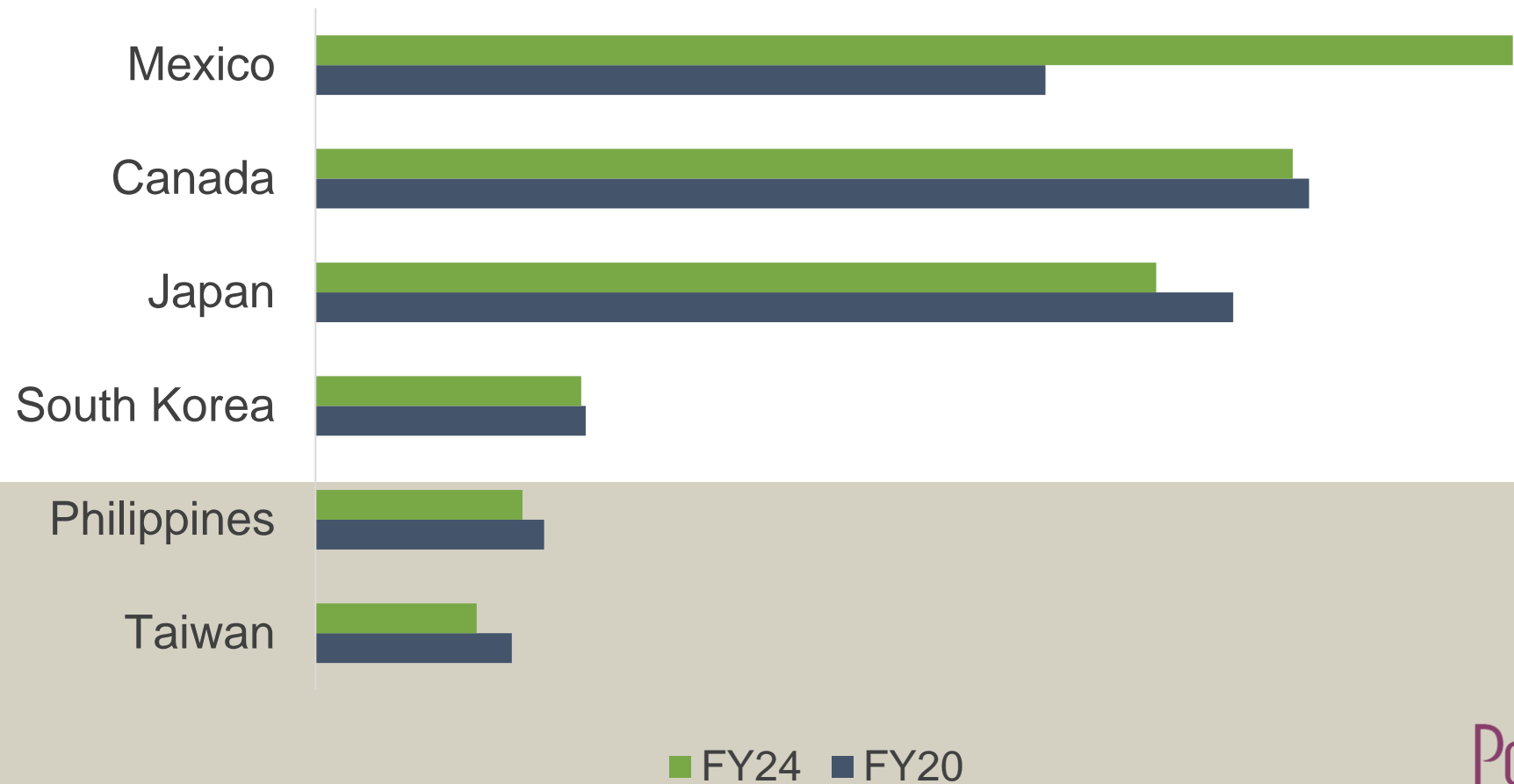
Total Potato Volume +1.2% since 2019



# Top 6 U.S. Export Markets

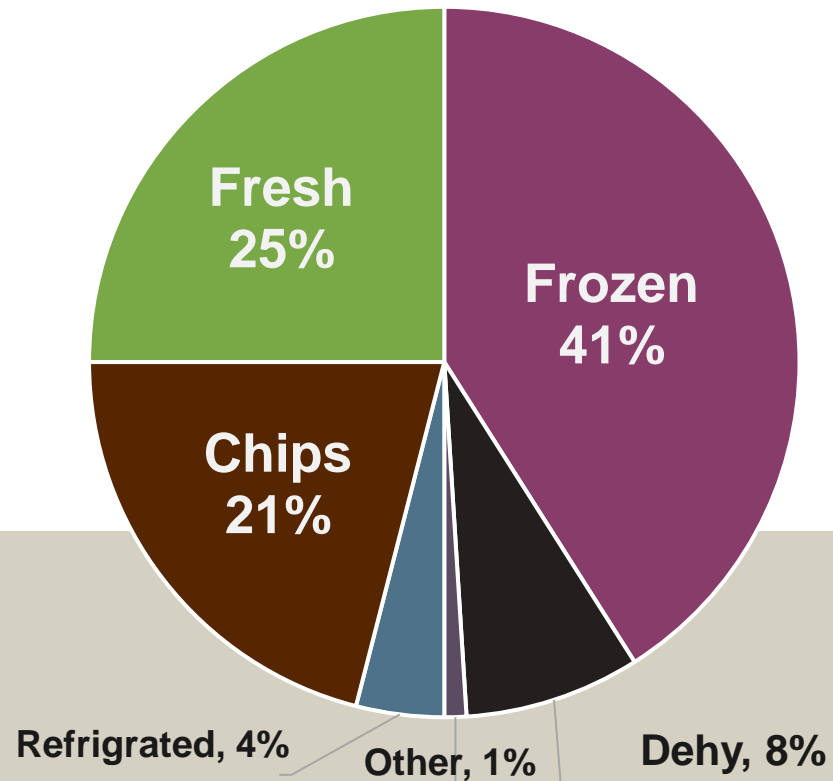


79% of Exports

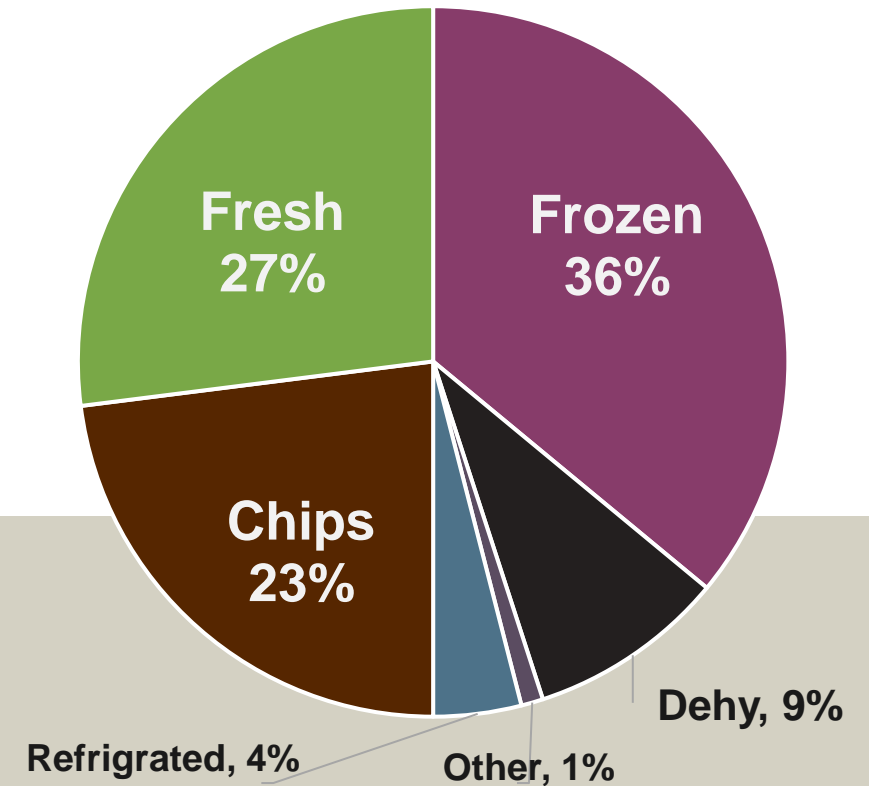


# U.S. Crop Usage by Form

July-June 2019

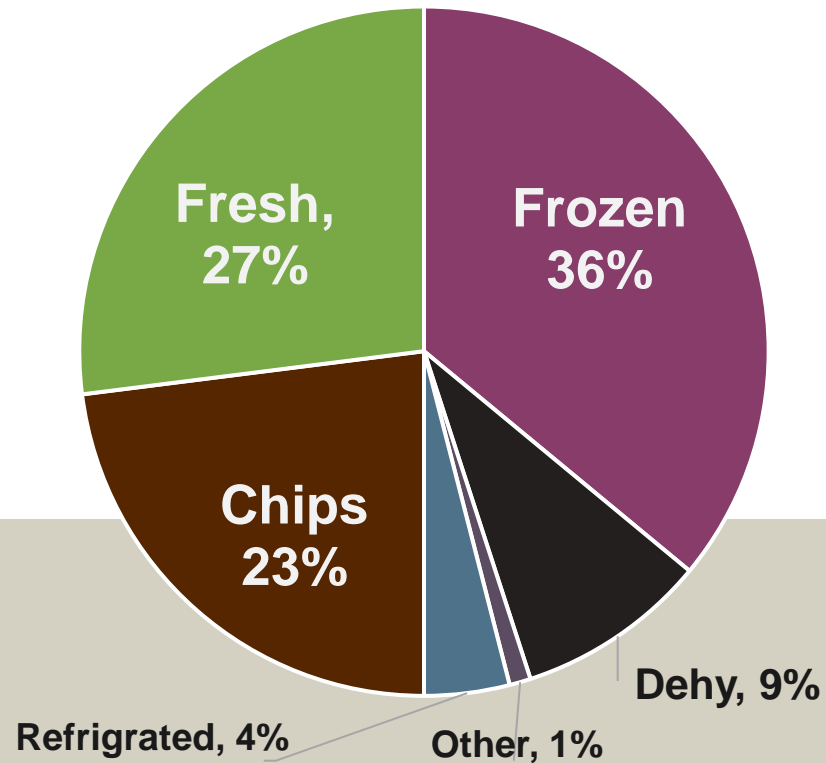


July-June 2024

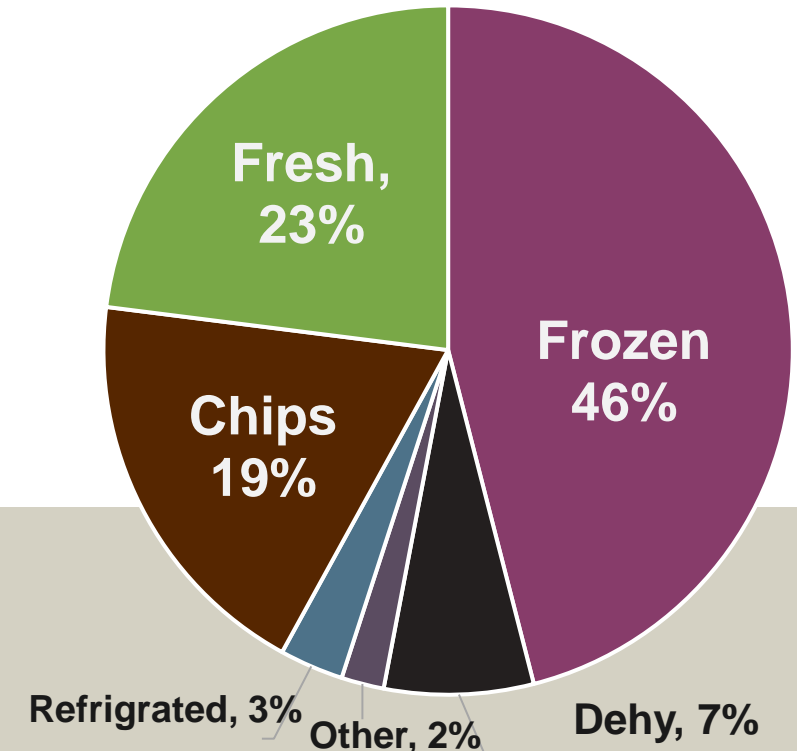


# Domestic Sales by Form

U.S. Crop  
July-June 2024



All Sales In the U.S.  
July-June 2024



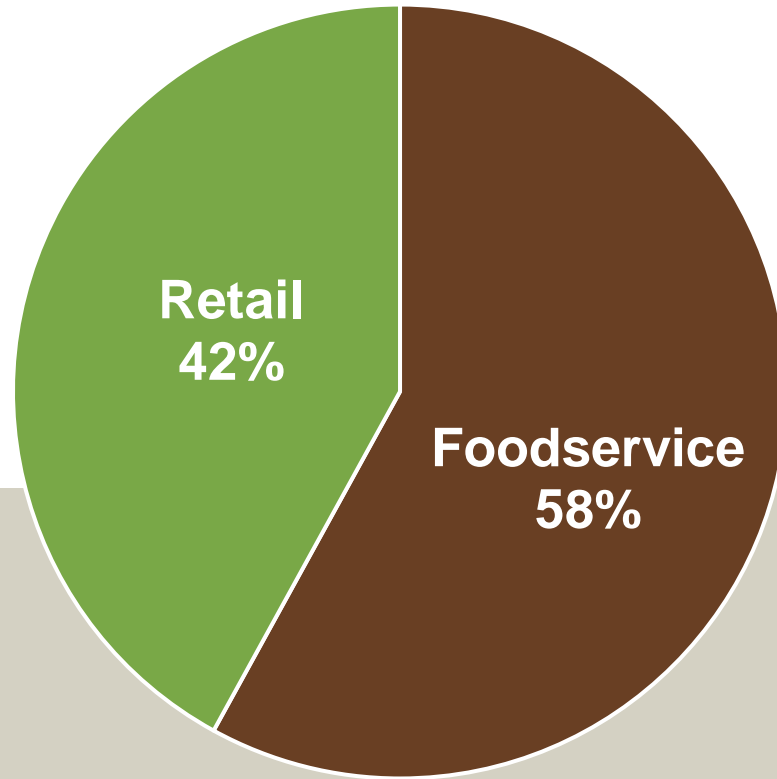
# Imports and Exports

## 40% Increase in Imports

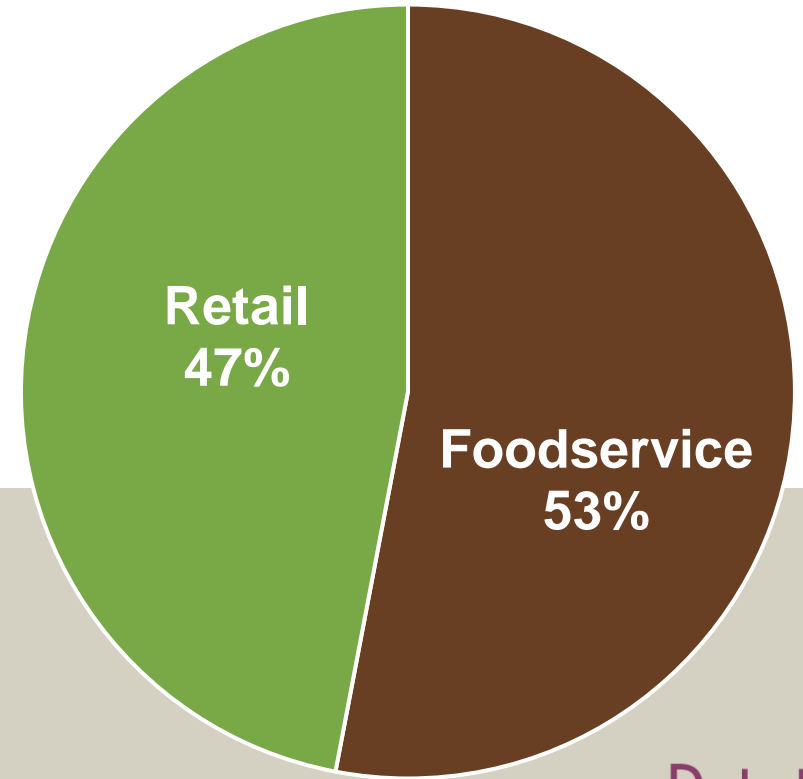


# Potato Sales in the U.S.

July-June 2019



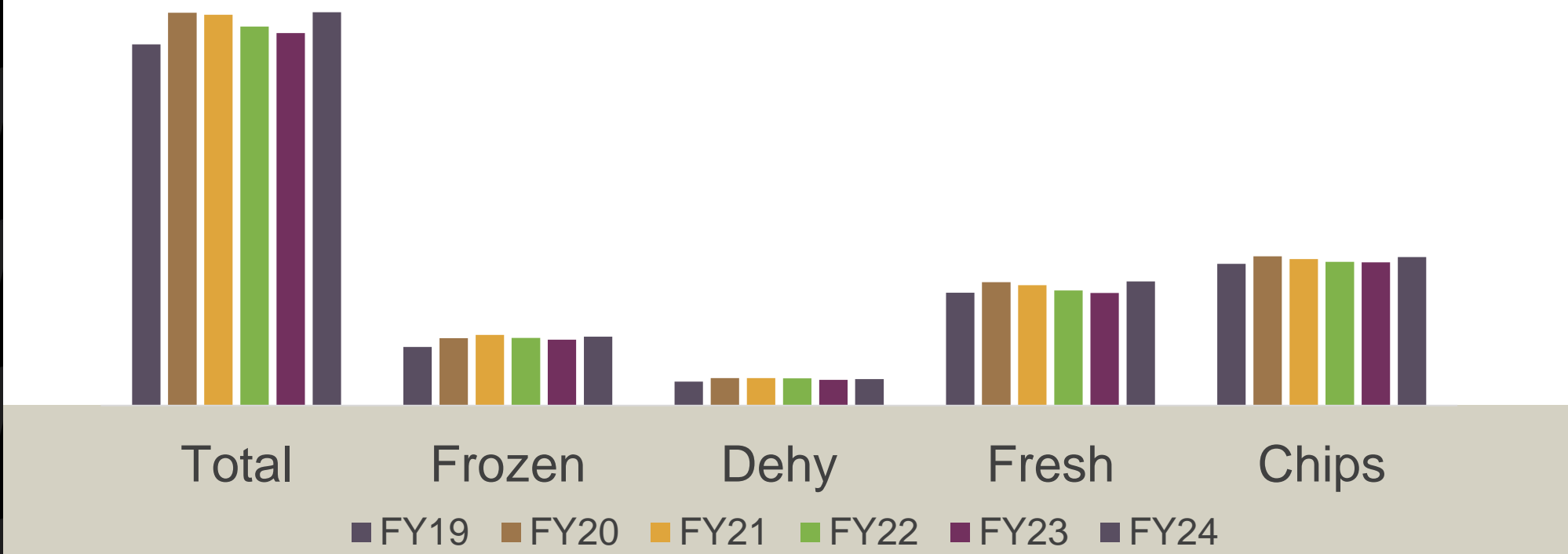
July-June 2024





# U.S. Retail Sales

## 9% Increase Compared to 2019

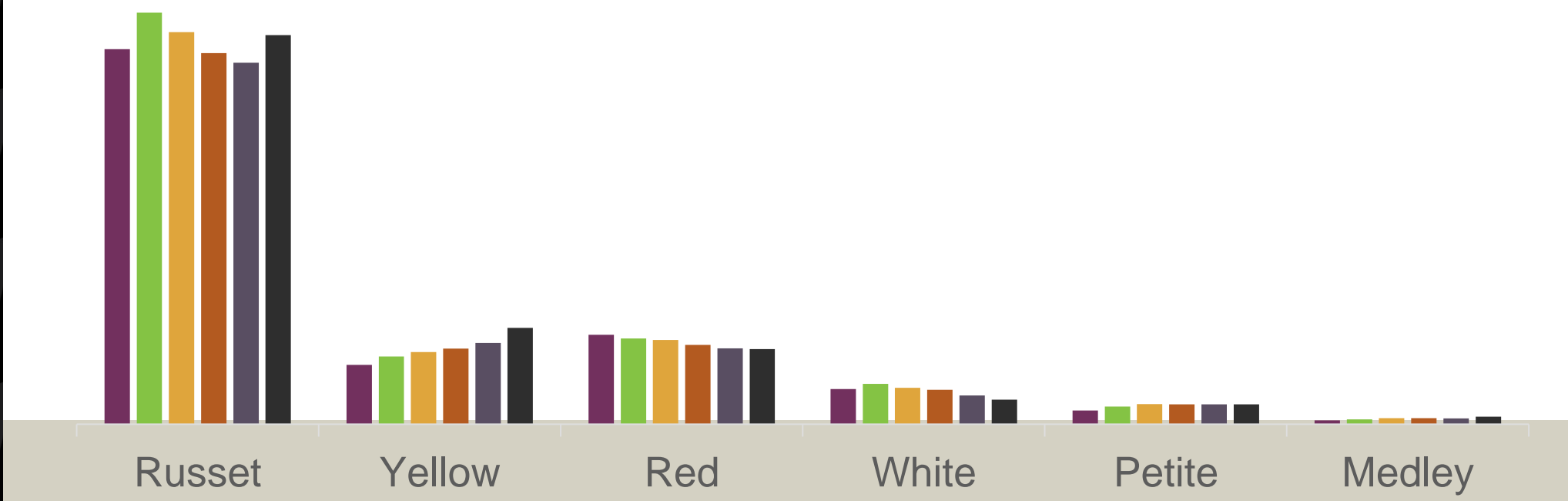


Volume



# U.S. Fresh Retail

10% Increase Compared to 2019



Volume

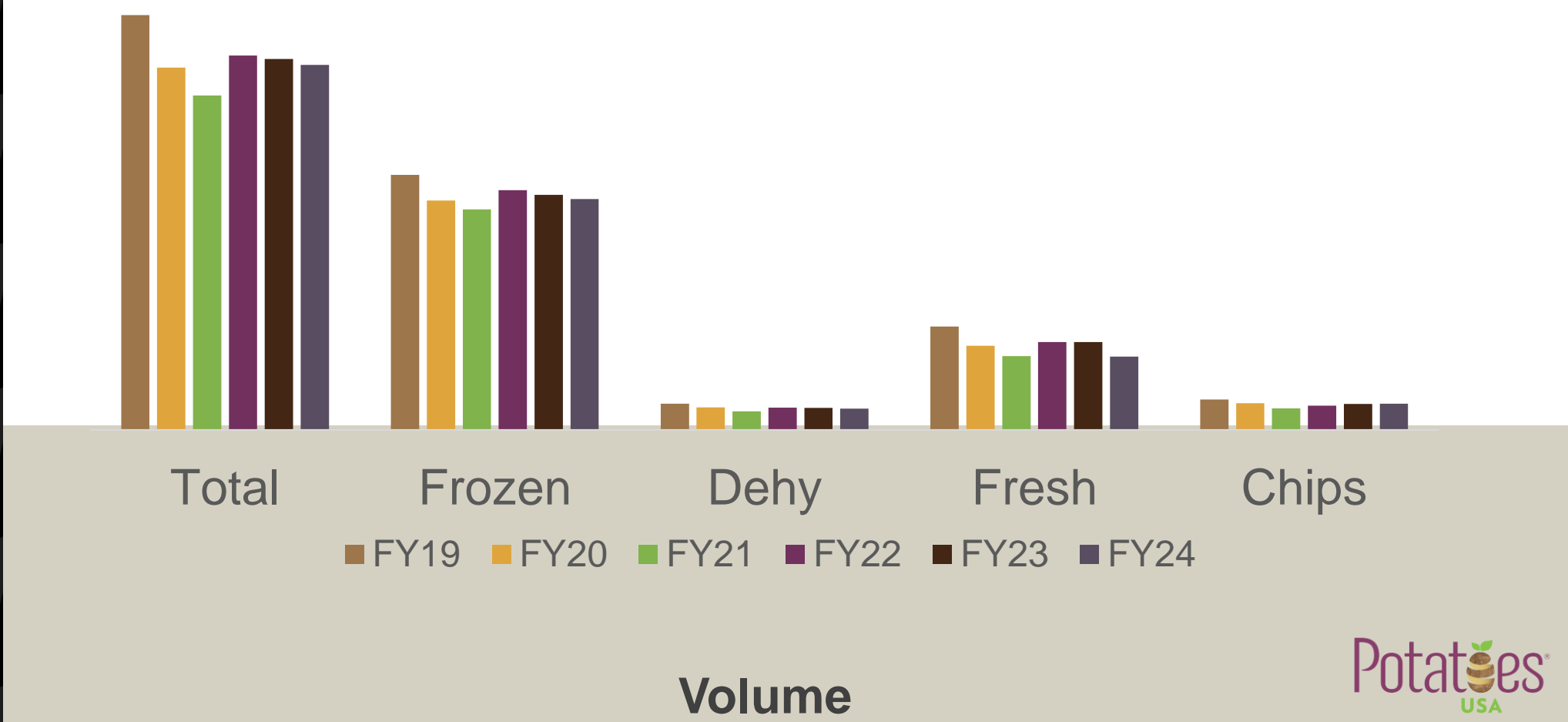






# U.S. Foodservice Sales

## 10% Decrease Compared to 2019

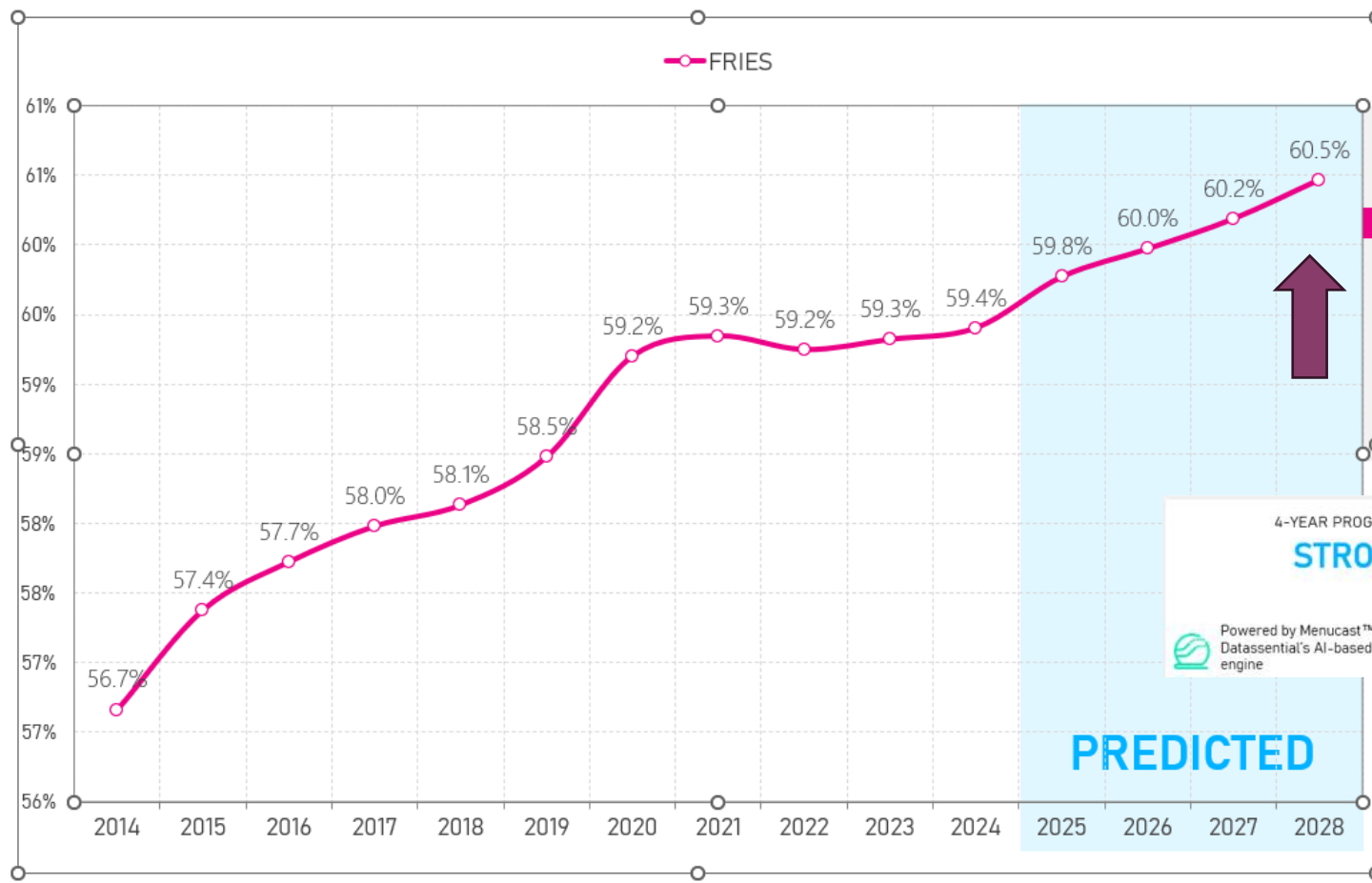


Volume



# Menu Penetration

% of US restaurant menus that feature;  
current year = annual data for year ending Q3 2024



	MENU PENETRATION	4-YR GROWTH PAST	4-YR GROWTH PREDICTED
FRIES	59.4%	1%	2%

4-YEAR PROGNOSIS  
**STRONG**

Powered by Menucast™  
Datassential's AI-based prediction engine

FRIES ranks in the **84th percentile** for future growth potential.

Its growth is predicted to outperform 84% of all other foods, beverage, and ingredients over the next four years.

Powered by Menucast™  
Datassential's AI-based prediction engine



# Domestic Consumers

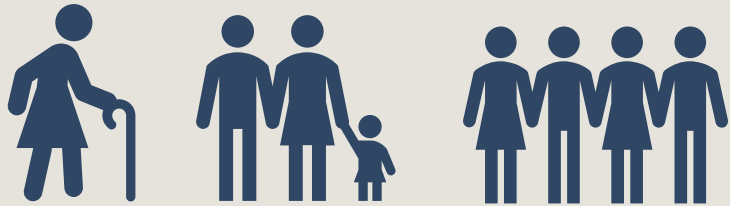


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# American's Love Potatoes



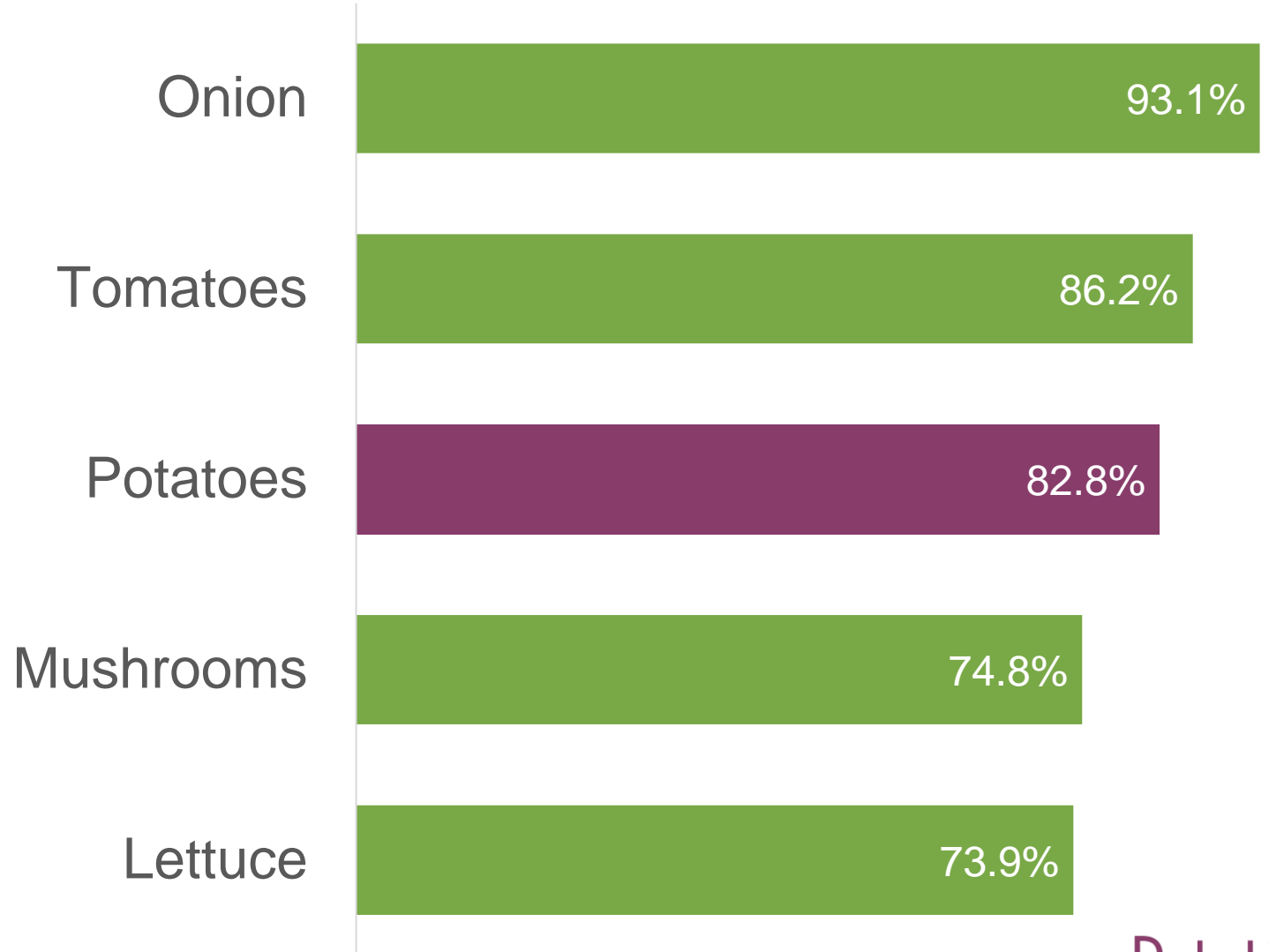
# Beloved Across Generations



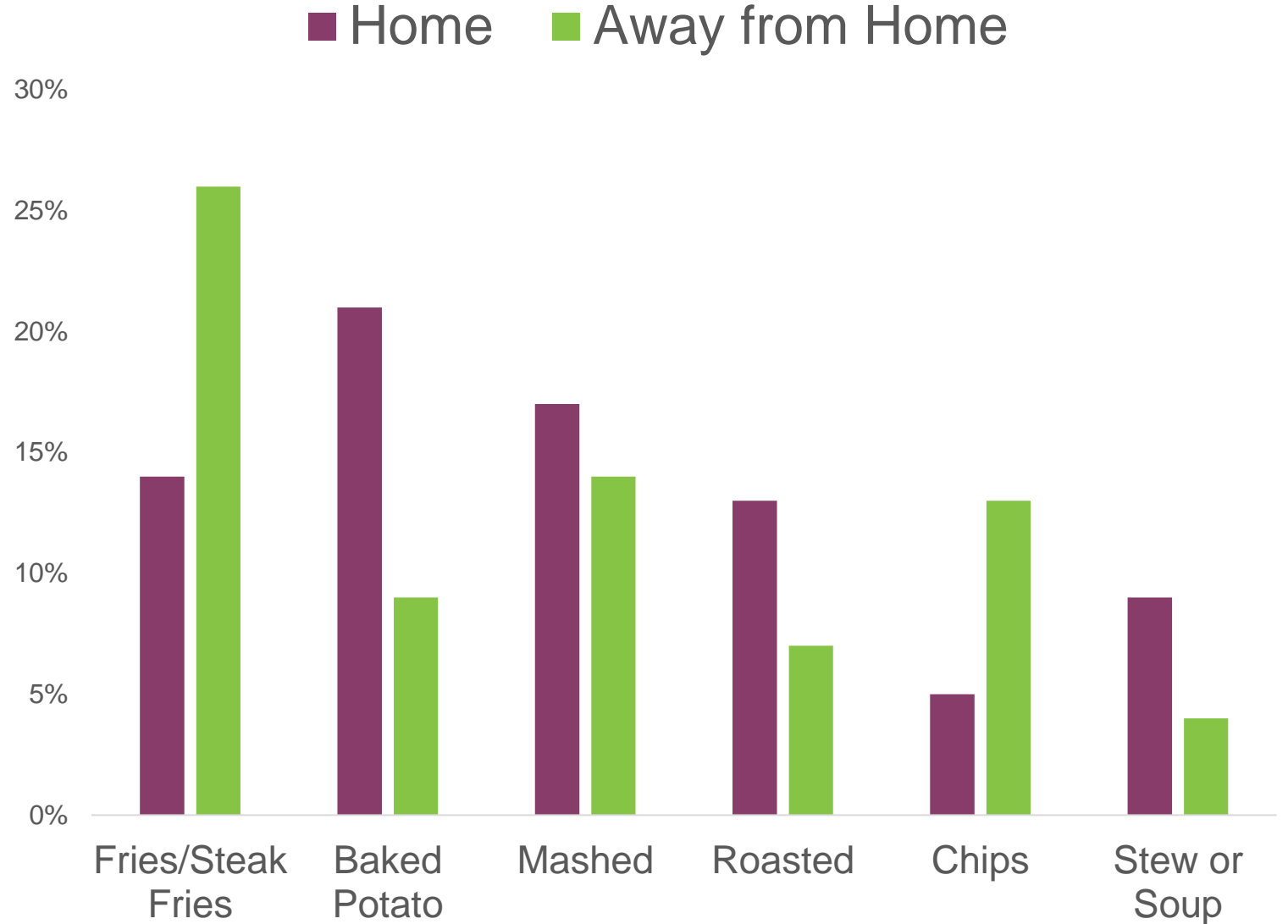
*% that "Like" or "Love" Potatoes*

# A Top Menu Performer

Potatoes are on 83% of all U.S. Restaurant Menus



# Top Potato Dishes at Home and Away from Home



Which of the following foods best describes the form or style of potatoes that you had as part of your [meal] yesterday?

# Traditional Fries Rank Among the Most Popular

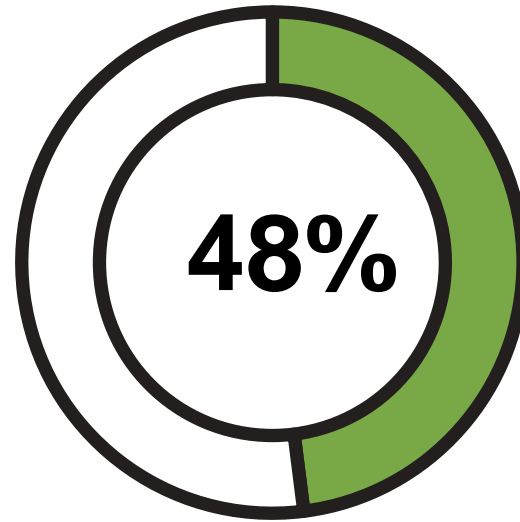


	Total U.S.	Gen Z	Millennials	Gen X	Boomers
Fries	91%	90%	90%	93%	91%
Curly Fries	85%	<b>83%</b>	88%	<b>91%</b>	78%
Seasoned Fries	85%	<b>83%</b>	<b>89%</b>	87%	81%
Home Fries	84%	71%	85%	89%	<b>87%</b>
Crinkle Cut	82%	73%	83%	88%	82%

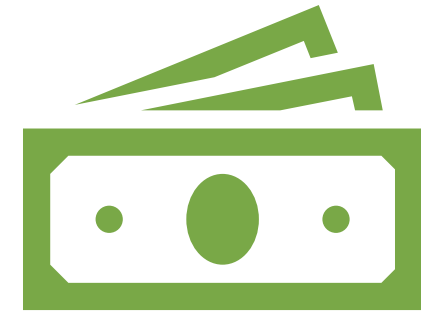
*% that "Like" or "Love" Potatoes*



# Potatoes Drive Sales



Willing to pay  
more for a dish  
with potatoes.

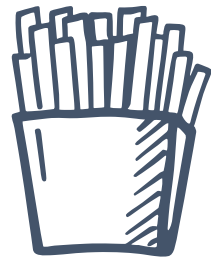


+ \$3 - \$8



Potatoes<sup>®</sup>  
USA

# Conclusion



- Global demand is expected to remain strong
- Global growth will be driven by China and India
- Solid U.S. export and domestic retail sales in last 5 years
- U.S. foodservice is lagging, but expected to grow
- Top menu performer
- Beloved by all generations

# Thank You

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PotatoesUSA.com



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Potatoes Fuel You

