

2026  
Potato  
Business  
Summit

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POTATO GROWERS OF CANADA  
LES PRODUCTEURS UNIS DE POMMES DE TERRE DU CANADA



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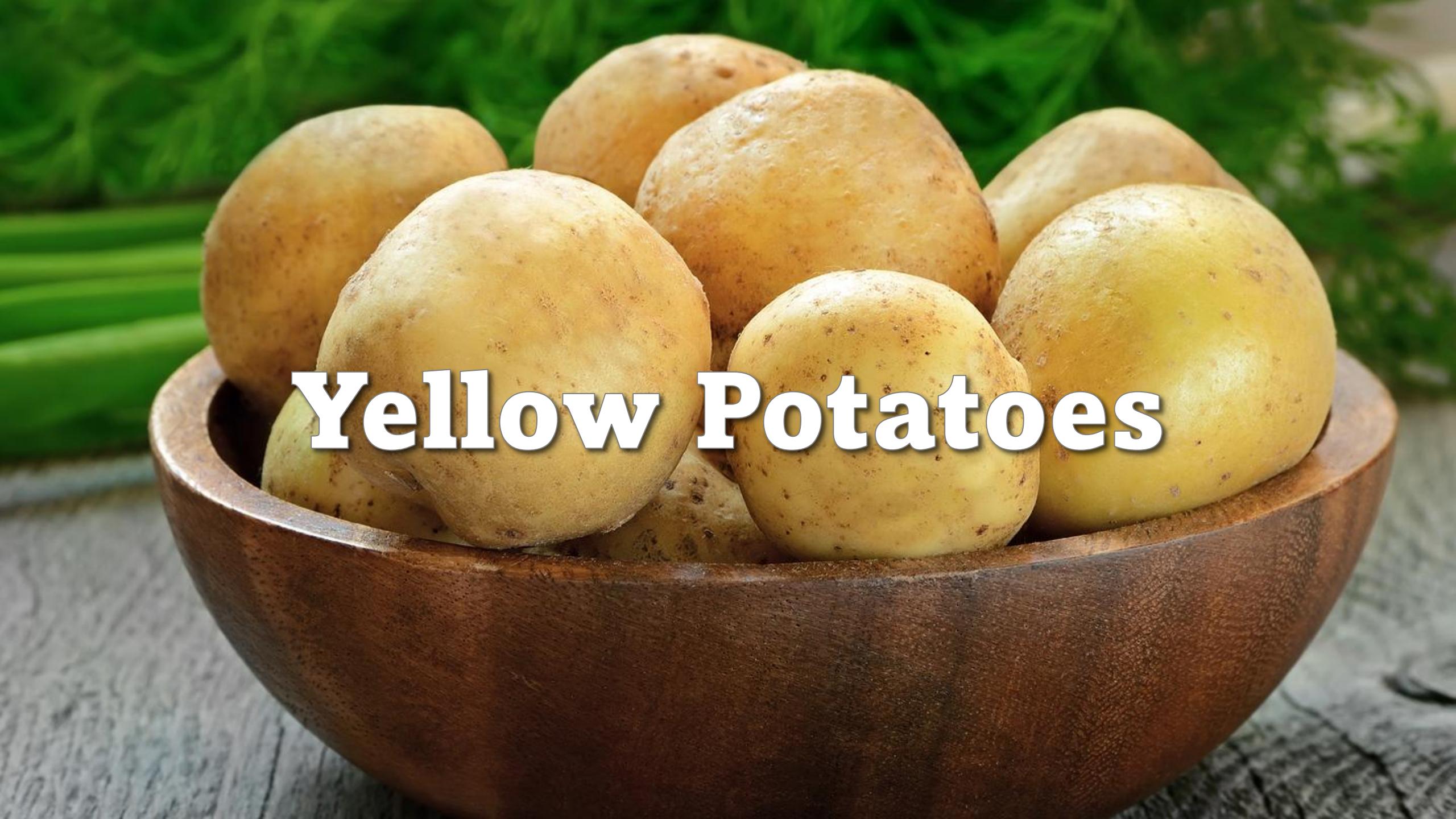
**Mark Klompien**  
President & CEO  
United Potato Growers of America

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# **2025-26 Fresh-Potato Market**

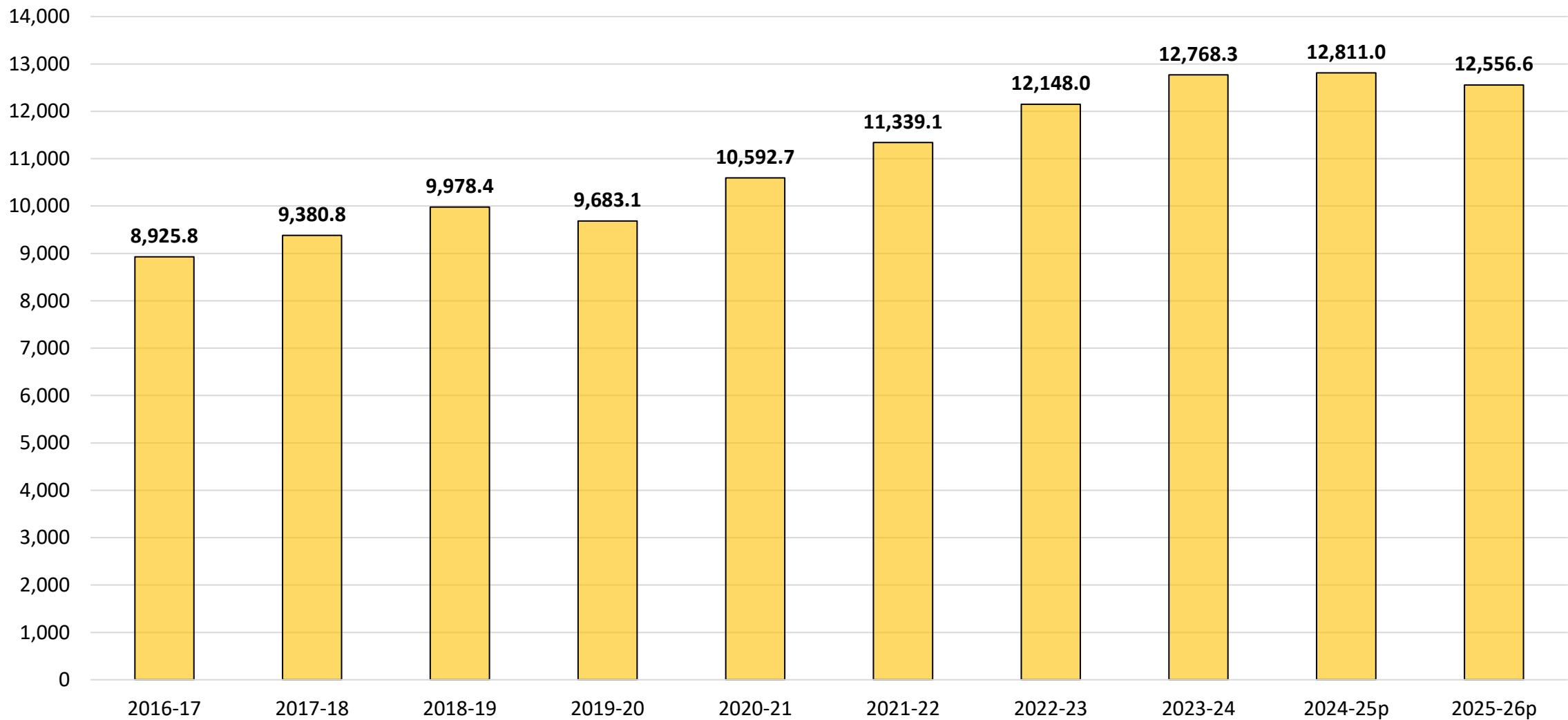
## **10-Year Varietal Supply/Price History and Market Outlook**



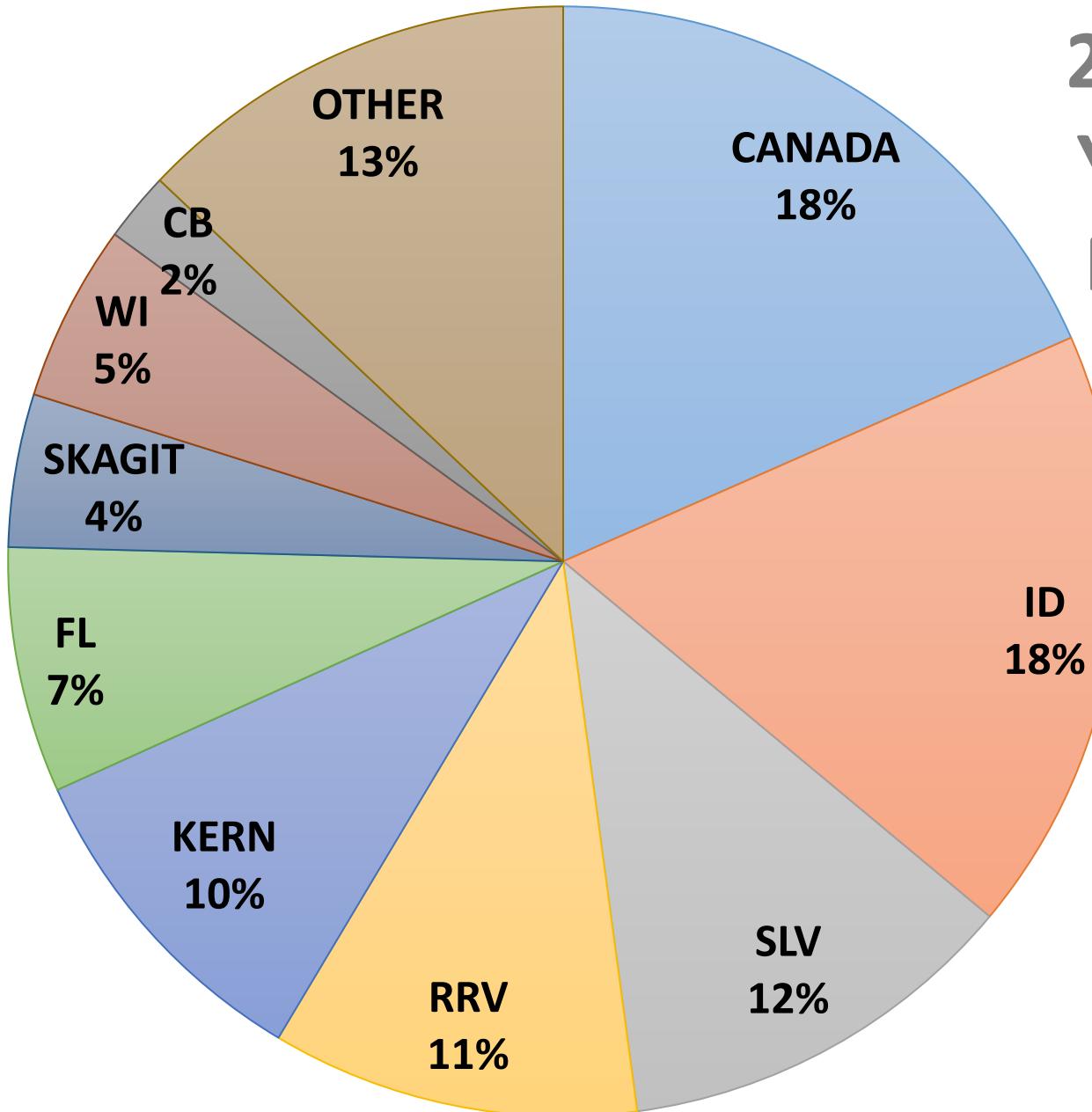
Yellow Potatoes

000 cwt

## US Fresh Yellow-Potato Shipments



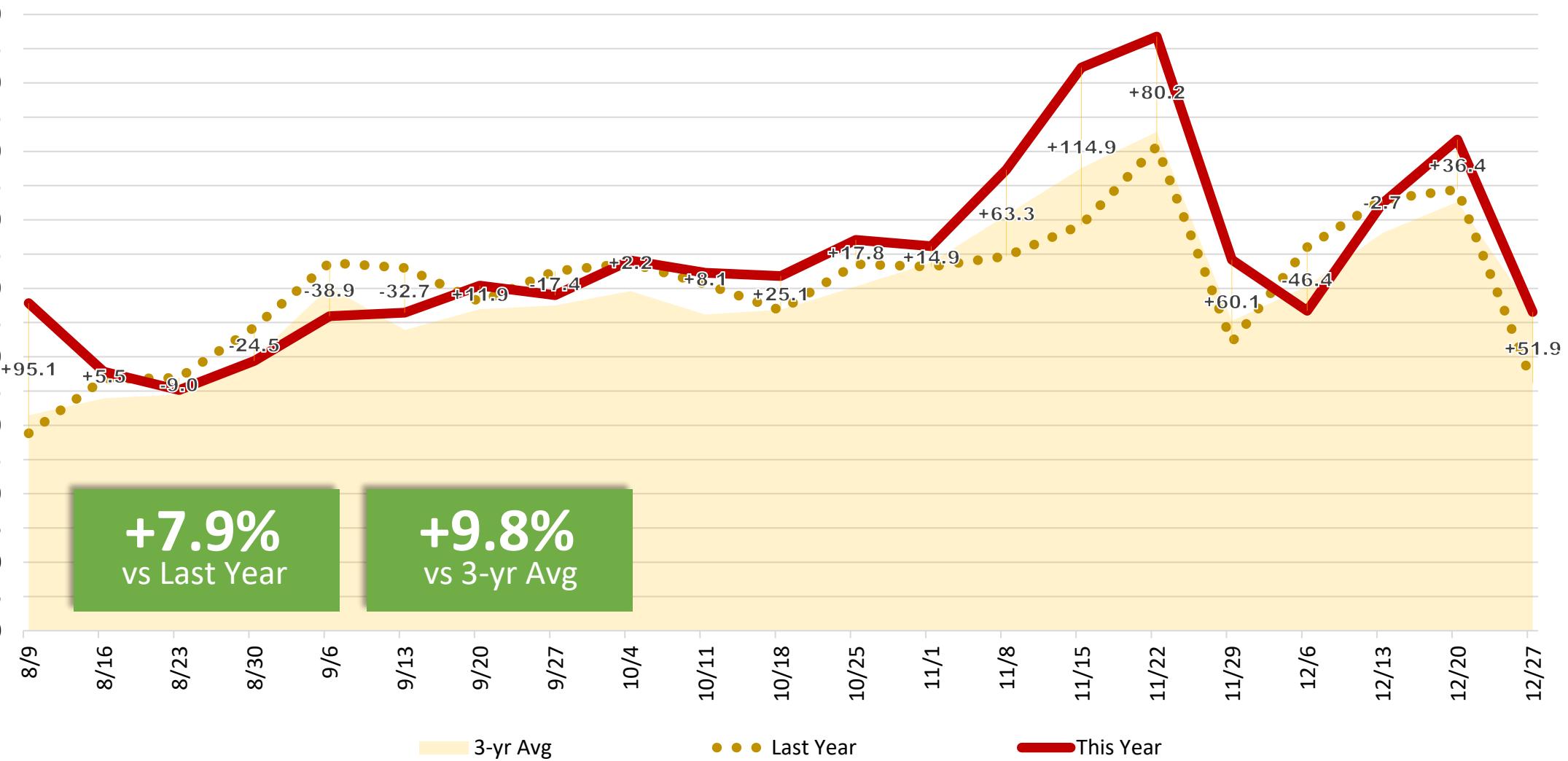
# 2025-26 Fresh Yellow Potato Market Share



Projected Total Fresh Yellow Shipments:  
12,556,600 cwt

000 cwt

## Yellow Potato Tracker - 2025-26 to Date



+7.9%  
vs Last Year

+9.8%  
vs 3-yr Avg

3-yr Avg

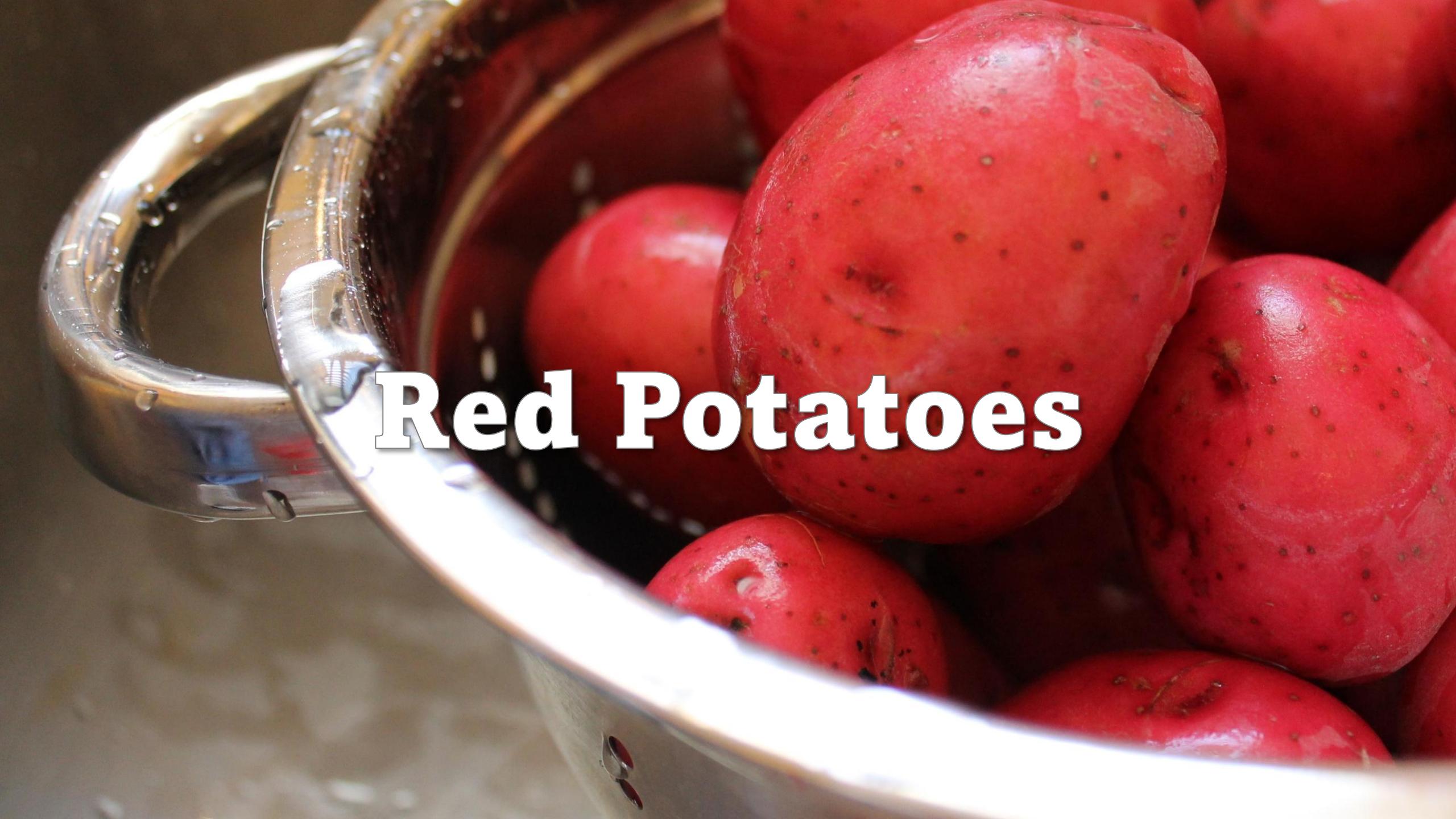
Last Year

This Year



# Yellow-Potato Supply Data

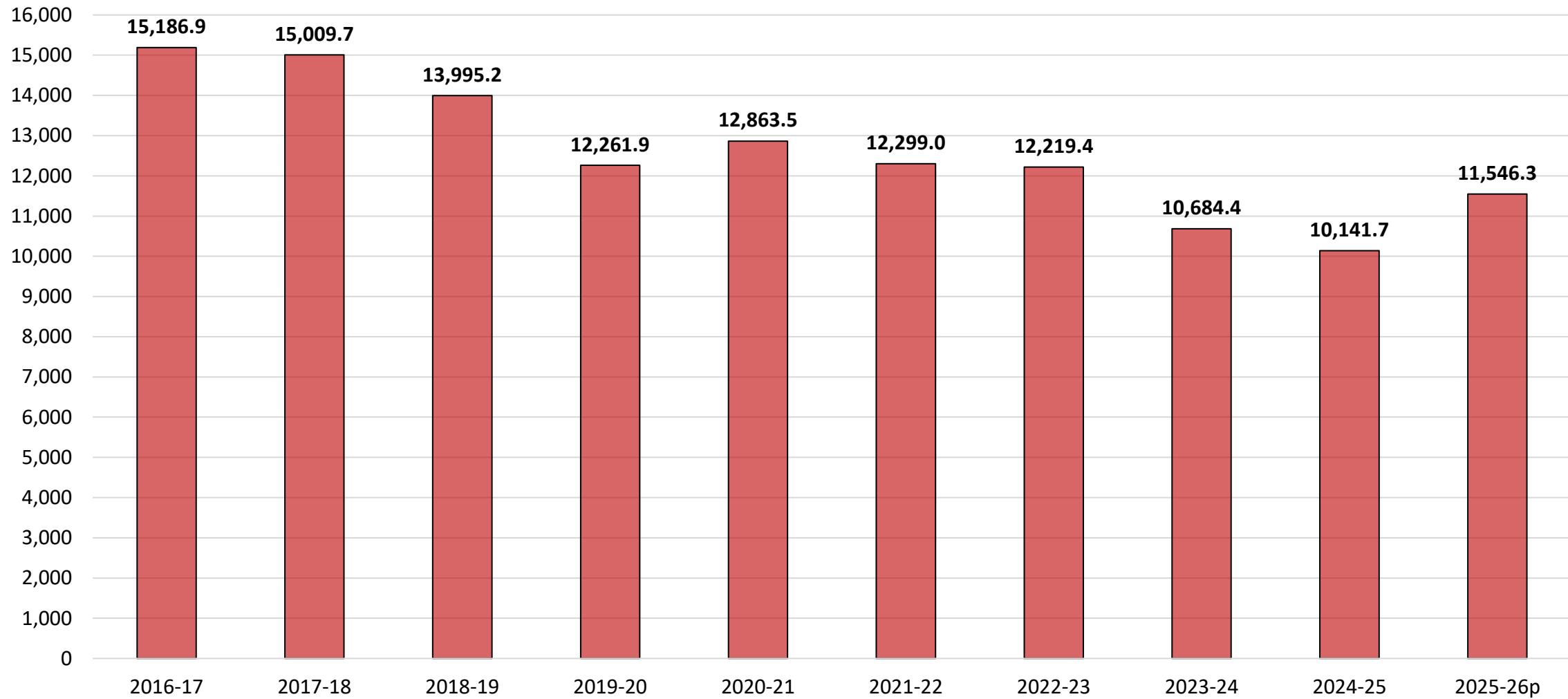
- Average 10-year annual growth rate in Yellow supplies: **+5.6%/year**
- Growth rate vs last year: **-2.0%** (12,556.6 projected vs 12,811.0 LY)
- Demand stable, pricing still reasonable, albeit at lower levels than recent years
  - Current Tote A in \$15-16 range
- No single geographic region dominates the yellow market
  - Idaho (+14%), San Luis Valley (-3%), Red River Valley (+9%), Kern County (flat) , Florida (-19%)
    - ✓ Top 5 regions produce 57% of total U.S. supply
  - Canada Yellow supply to U.S (1<sup>st</sup> in a state ranking) 18% of U.S. consumption
- Market supply volumes stable, but have we reached the top rung of the ladder?



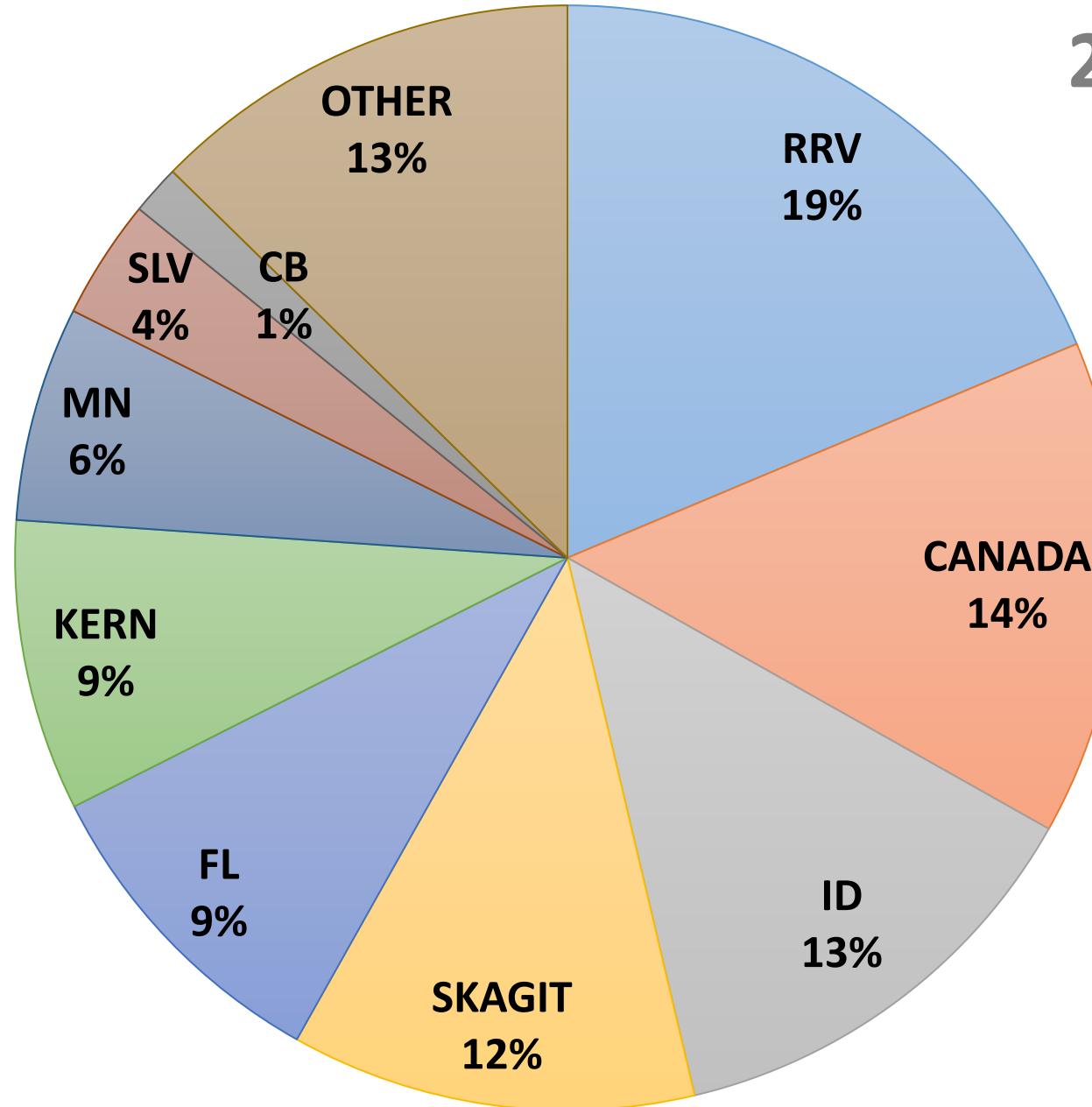
# Red Potatoes

000 cwt

## US Fresh Red-Potato Shipments



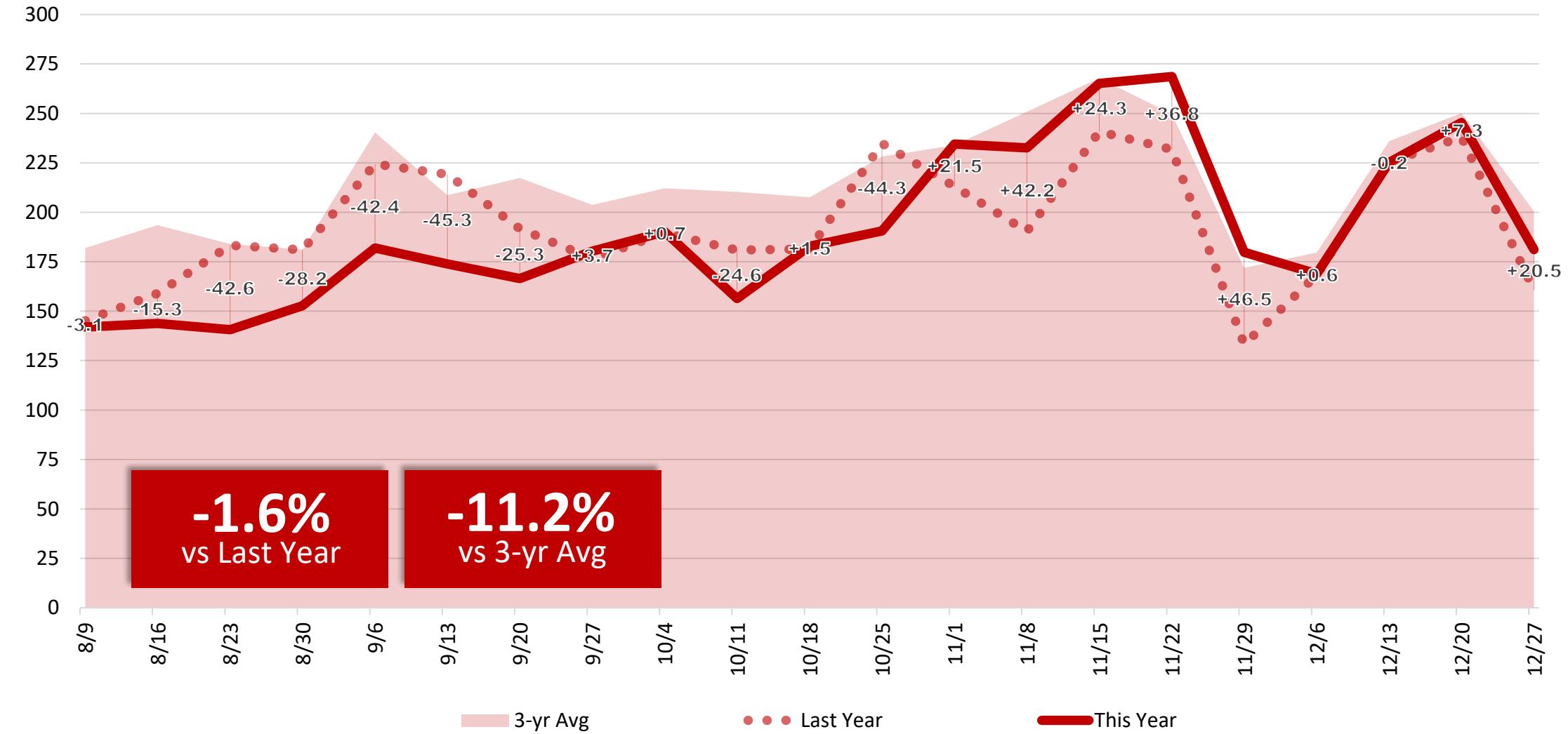
# 2025-26 Fresh Red Potato Market Share



Projected Total  
Fresh Red  
Shipments:  
11,546,300 cwt

000 cwt

## Red Potato Tracker - 2025-26 to Date



**-1.6%**  
vs Last Year

**-11.2%**  
vs 3-yr Avg

3-yr Avg

Last Year

This Year

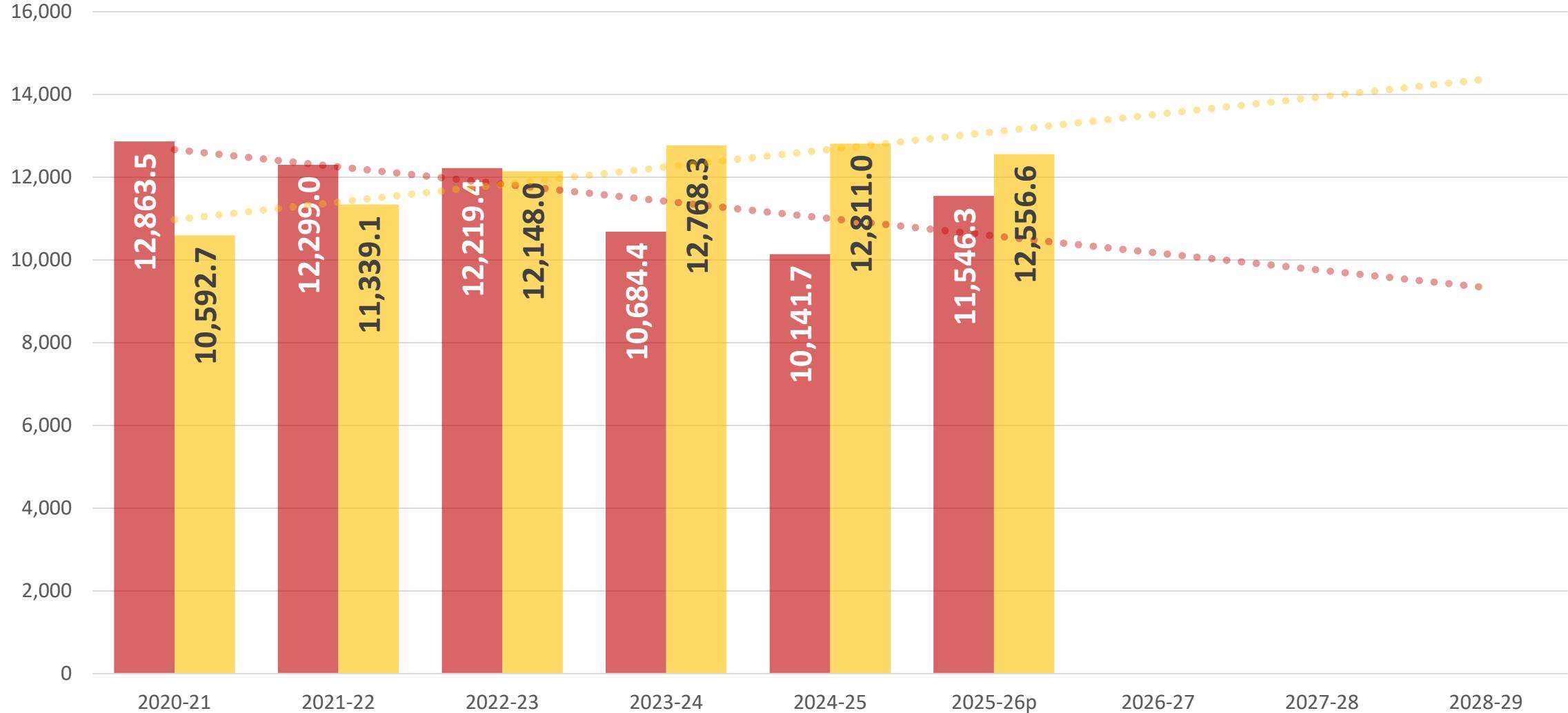


# Red-Potato Supply Data

- Average 10-year annual growth rate in Red supplies: **-2.4%/year**
- Major 2025-26 Crop Shifts from Last Year:
  - Increases in almost all Red producing regions, including the 5 largest
    - ✓ Red River Valley, Idaho, Kern County, and Wisconsin (Florida flat)
  - Canada Red supply to US (2<sup>nd</sup> in a state ranking) 15% of US consumption
- Pricing
  - Red price down over last year, and also down versus 5-yr average
    - ✓ Current Pricing for Tote Size A in the \$16 range

000 cwt

## Total US Shipments of Red and Yellow Potatoes

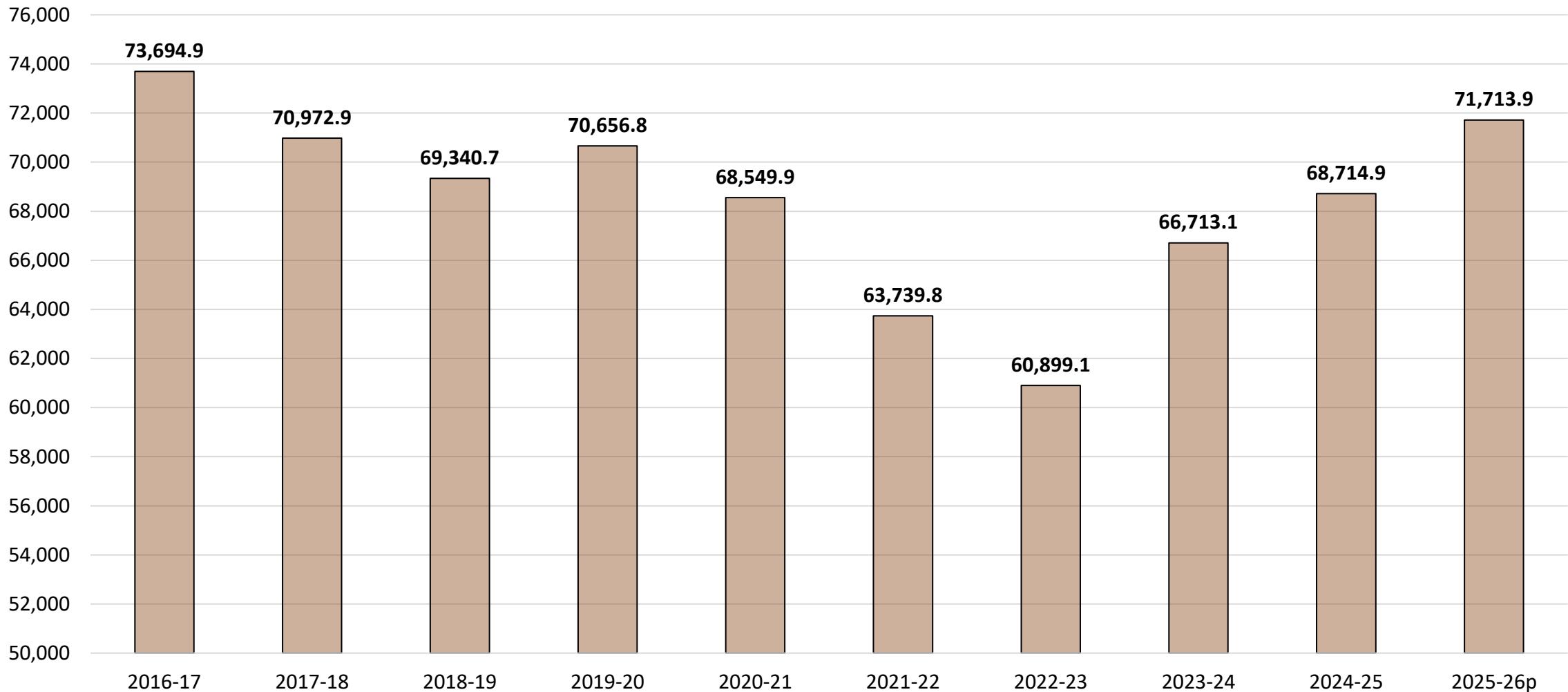




# Russet Potatoes

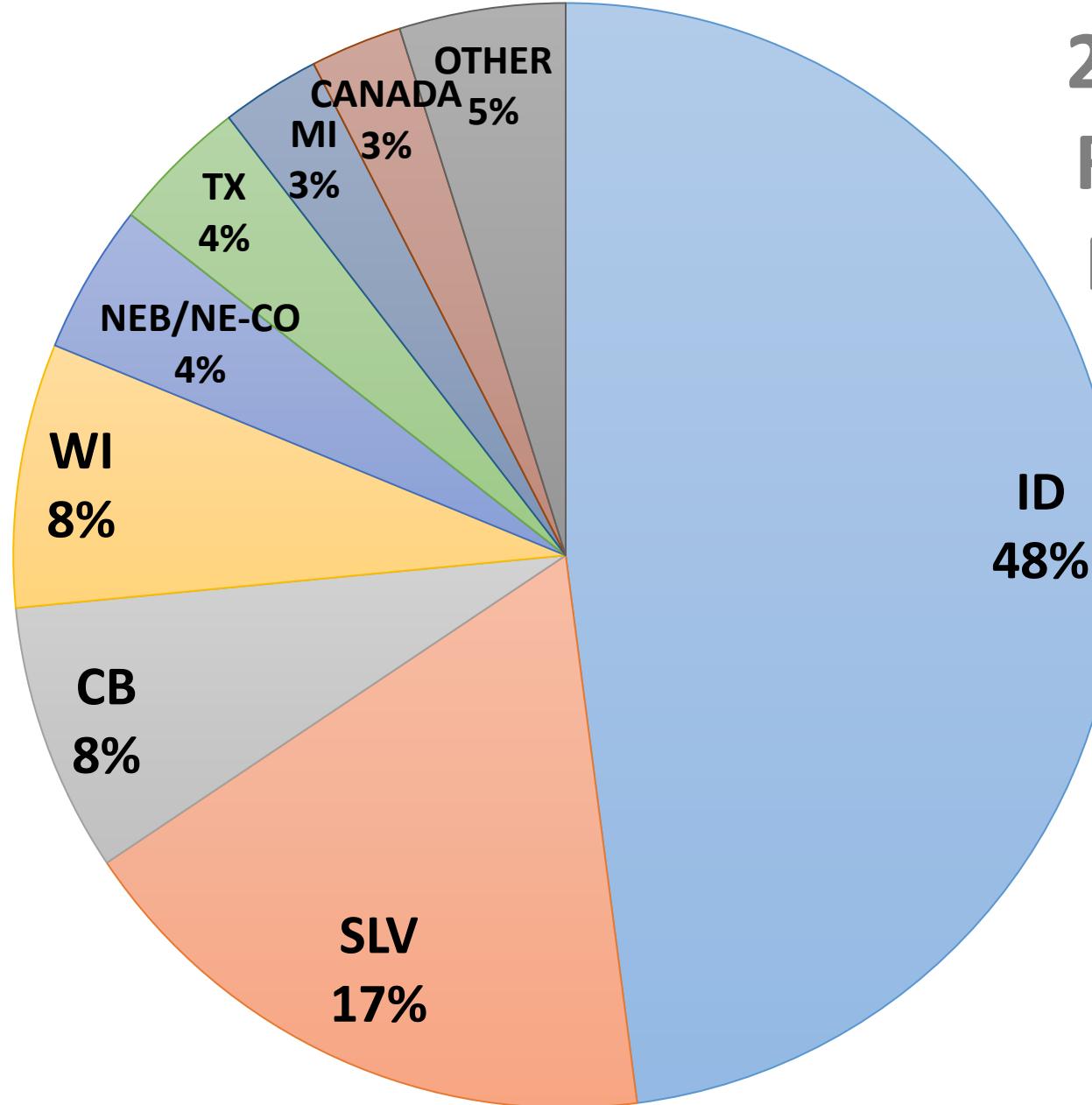
000 cwt

## US Fresh Russet-Potato Shipments



# 2025-26 Fresh Russet Potato Market Share

Projected Total  
Fresh Russet  
Shipments:  
71,713,900 cwt



000 cwt

## 2025-26 Russet Potato Shipments

Projection: 71,713.9

Shipped to Date: 28,798.5

Remainder: 42,915.5

To Date vs Last Year

**-1.0%**

Grower Return Index

\$16

To Date vs 5yr Avg

**+4.6%**

\$14

\$12

\$10

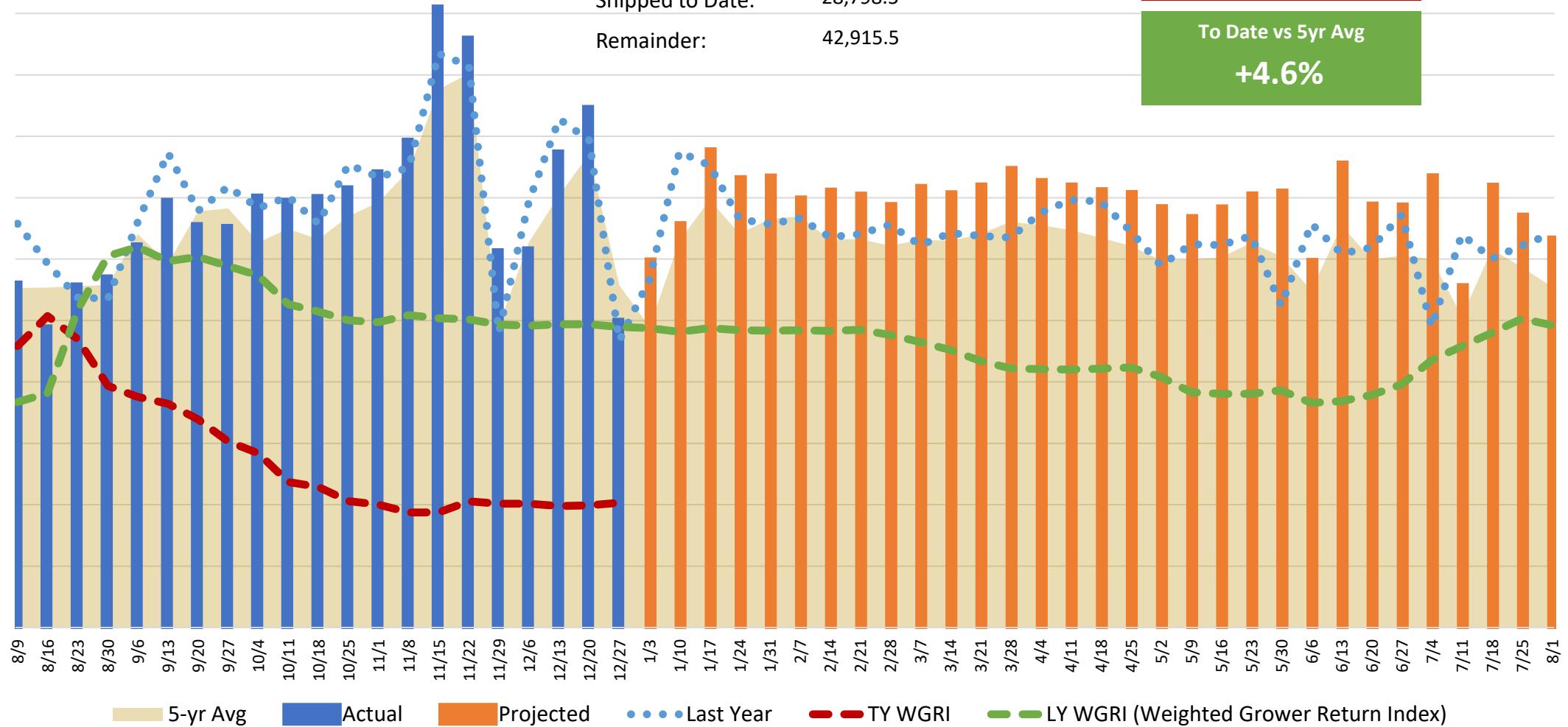
\$8

\$6

\$4

\$2

\$0

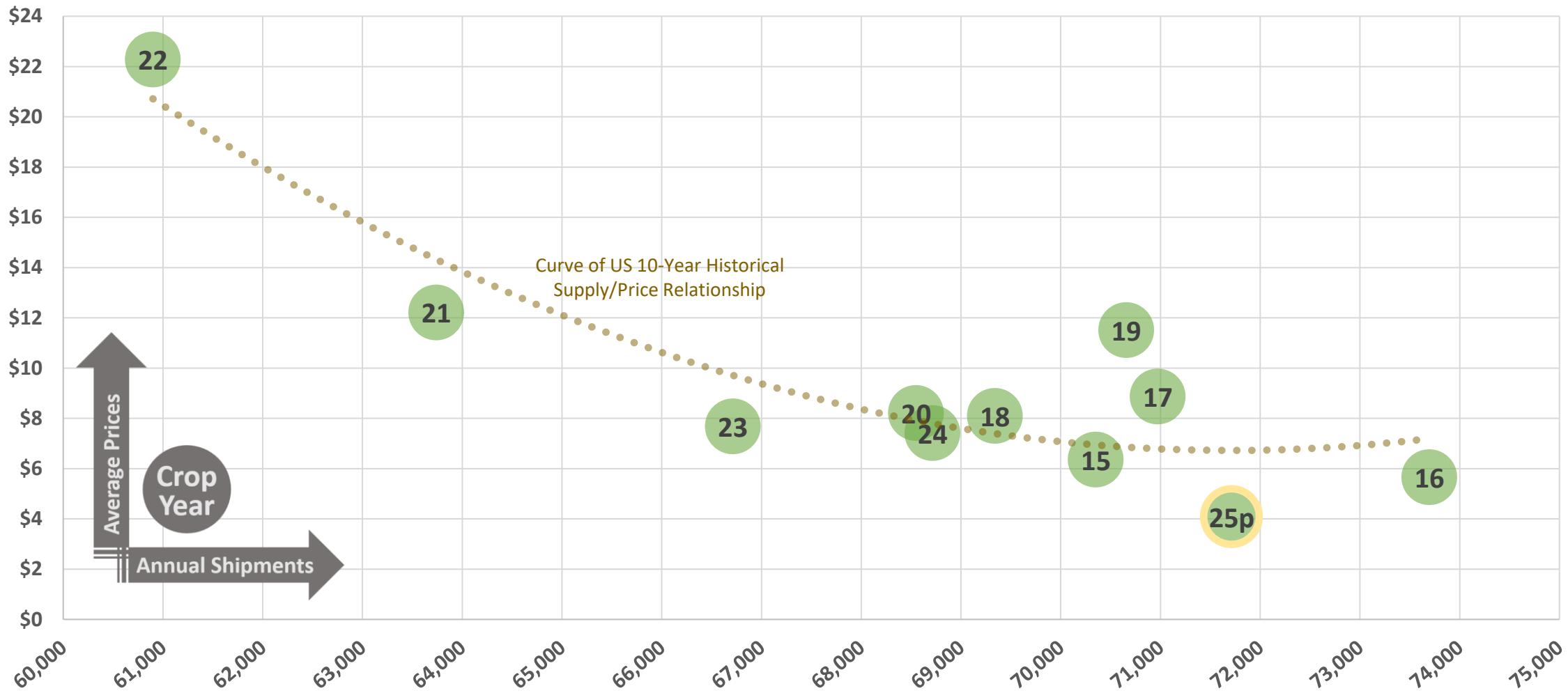


5-yr Avg    Actual    Projected    Last Year    TY WGRI    LY WGRI (Weighted Grower Return Index)



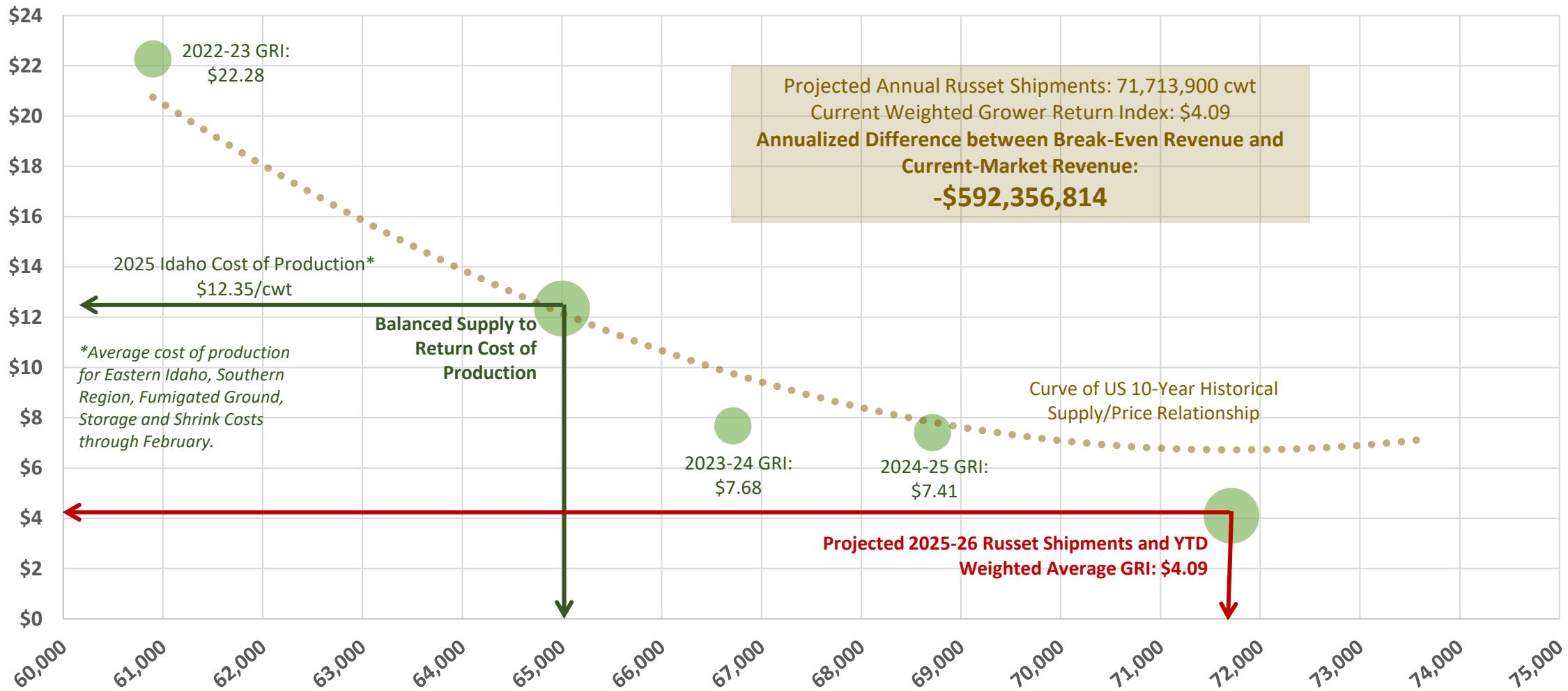
# Relationship Between US Russet Shipments (supply) and Price (weighted GRI) for a Break-Even Supply and Current-Actual Supply Based on a 10-Year History

Updated  
12/27/2025



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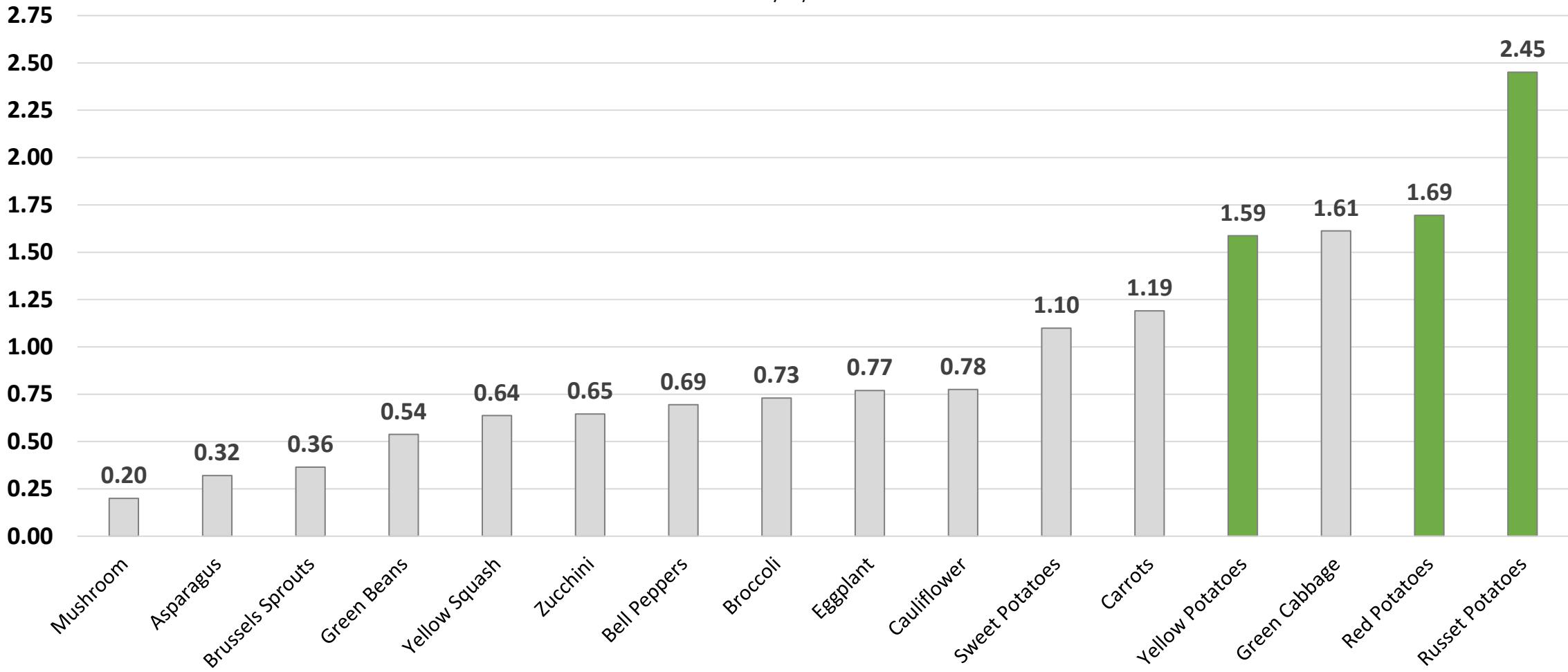
LBS PER  
DOLLAR

## \$1 Consumer Purchasing Power

(based on promoted prices published in the National Retail Report - USDA-AMS)

- Potato prices per lb based on promoted 5lb bags -

12/27/25





2026 OUTLOOK

<b>Alternative Crop Price Changes, 2024-25</b>			
	<b>2024 *</b>	<b>2025 †</b>	<b>Change</b>
<b>Idaho GRI</b>	\$7.42	\$3.08	-58.5%
<b>All Wheat</b>	\$5.47	\$4.81	-12.1%
<b>All Barley</b>	\$6.28	\$5.48	-12.7%
<b>Malt Barley</b>	\$6.74	\$5.84	-13.4%
<b>Alfalfa</b>	\$166	\$164	-1.2%
<b>Corn</b>	\$4.10	\$3.96	-3.4%
<b>Soybeans</b>	\$9.85	\$10.11	2.6%

\* Oct-Dec

† Oct-Nov

*Slide courtesy NAPMN*



# Idaho Potato Cost of Production

Eastern Idaho, Southern Region, field-run, February



Courtesy Ben Eborn



# 2026 Crop Outlook

- Weak but Similar Alternative Crop Pricing / Much Weaker Idaho GRI
- Cost of Production Flattened, but Slightly Higher
  - Seed Supply / Water Supply / Crop Rotations
- Processing Situation
  - Demand Variability, Global Competition Landscape
  - Rationalization of Excess Raw Material, Contract Pricing
  - Significant Headwinds in Dehy Sector
- Other External Market Factors
  - International Markets Access, Ag Labor Uncertainties
- Market will Value Crop Consistent with Other Oversupply Years



**Thank you!**

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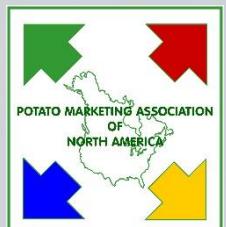
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