

2026 Potato Business Summit



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2025-26 Fresh-Potato Market

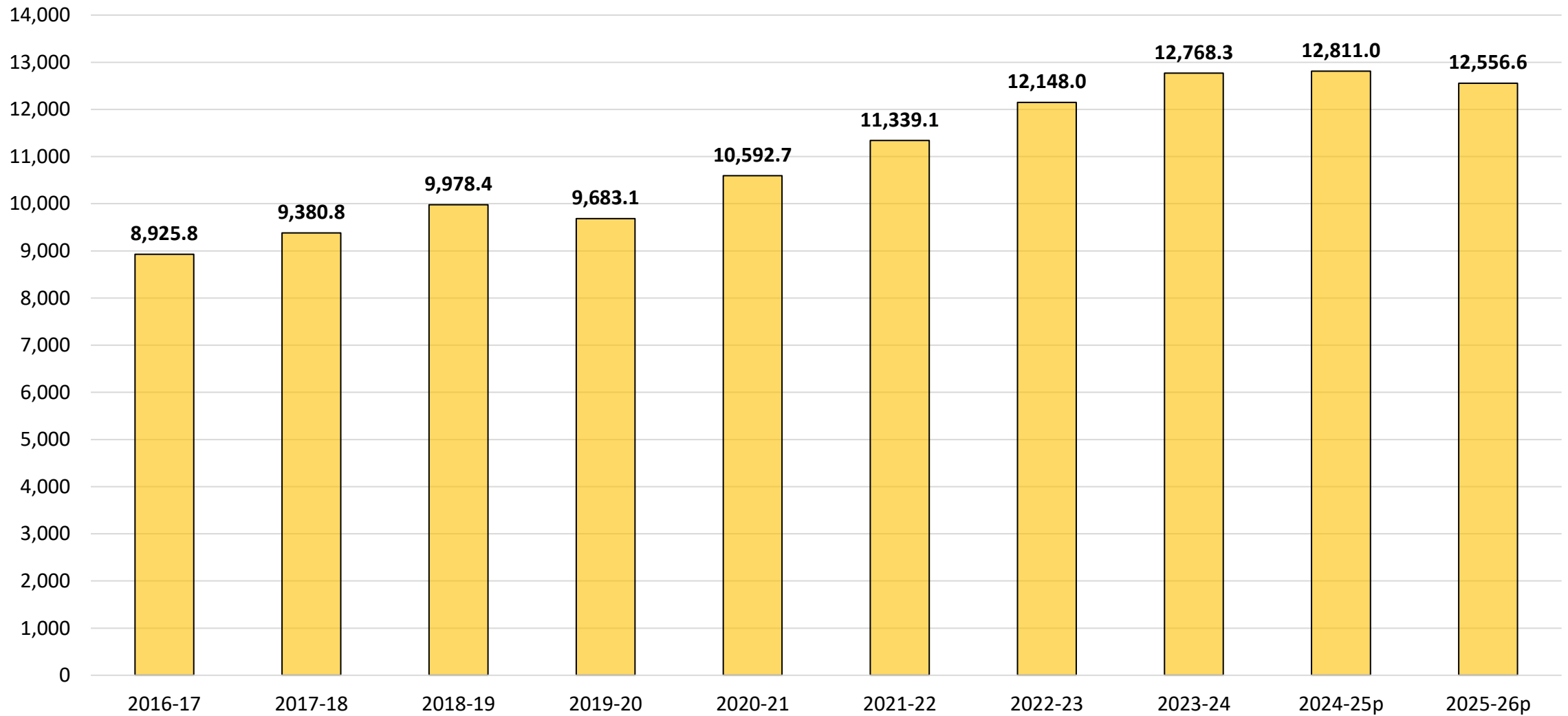
10-Year Varietal Supply/Price History and Market Outlook

A close-up photograph of a rustic wooden bowl filled with several small, round, yellow potatoes. The potatoes have a slightly textured, light brown skin. In the background, there are green leafy herbs, possibly dill or parsley, which are out of focus. The bowl is placed on a dark, textured wooden surface. The text "Yellow Potatoes" is overlaid in the center of the image in a bold, white, sans-serif font with a black outline.

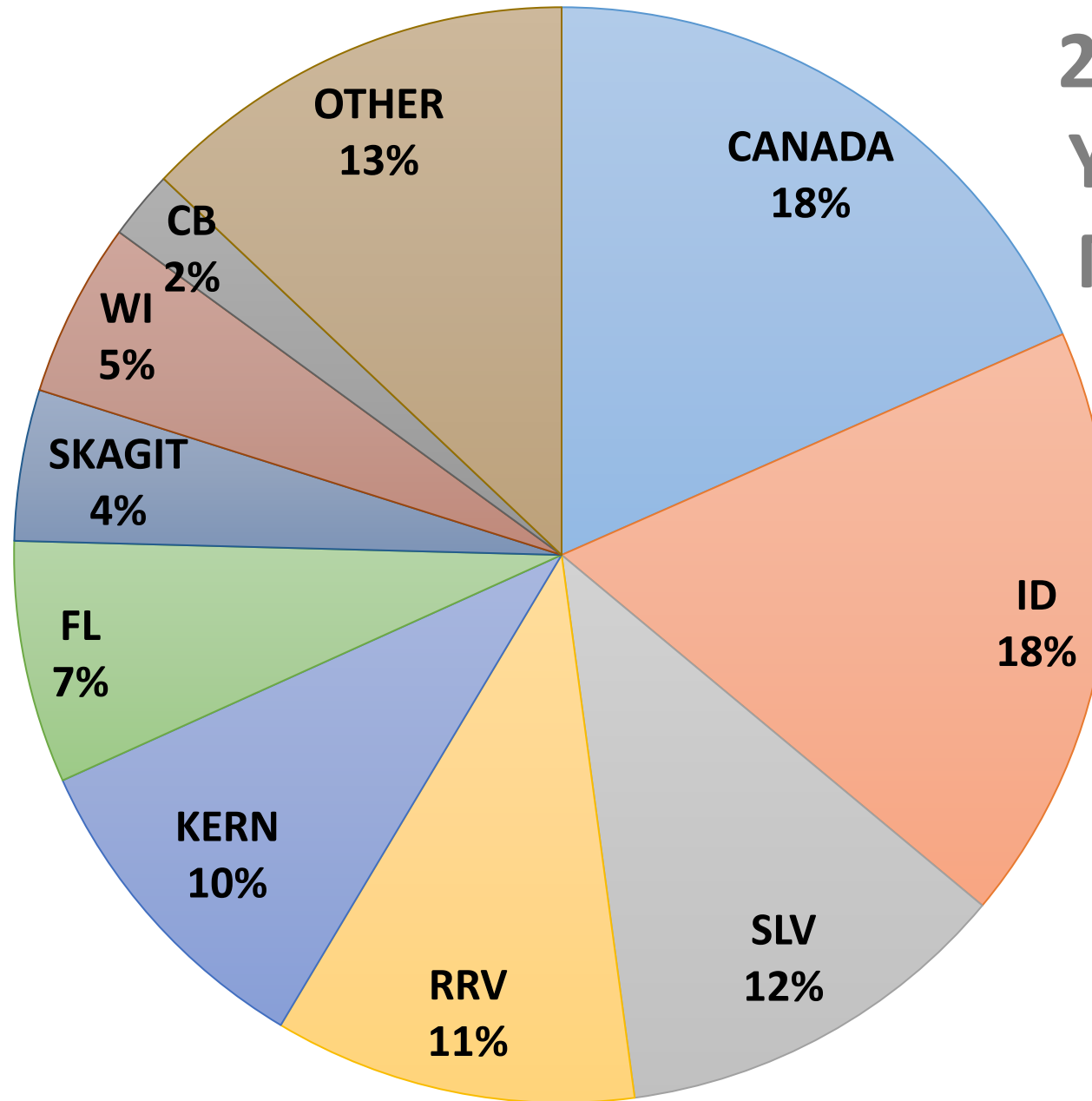
Yellow Potatoes

000 cwt

US Fresh Yellow-Potato Shipments



2025-26 Fresh Yellow Potato Market Share

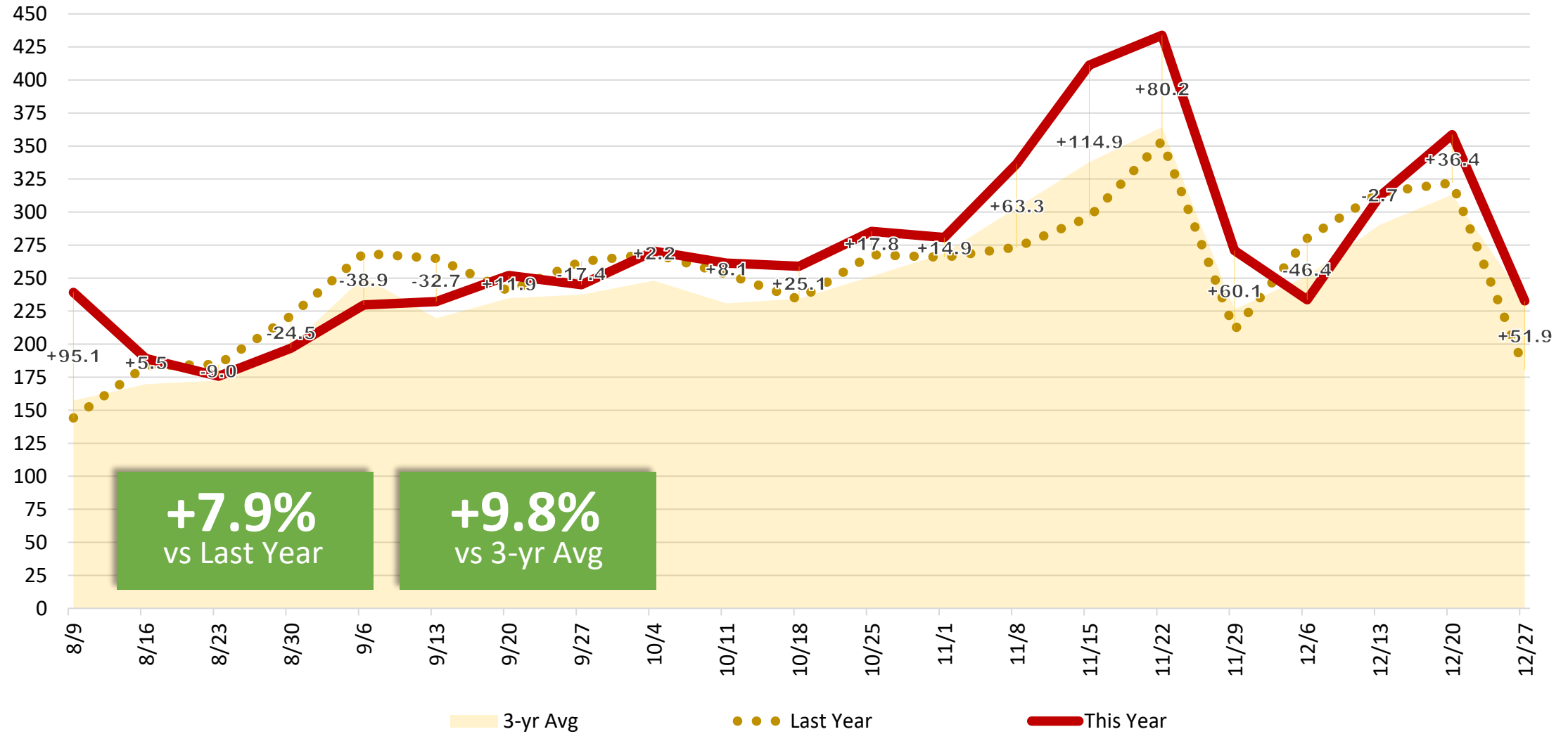


Projected Total
Fresh Yellow
Shipments:
12,556,600 cwt



000 cwt

Yellow Potato Tracker - 2025-26 to Date



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 (1st in a state ranking) 18% of U.S. consumption
- Market supply volumes stable, but have we reached the top rung of the ladder?

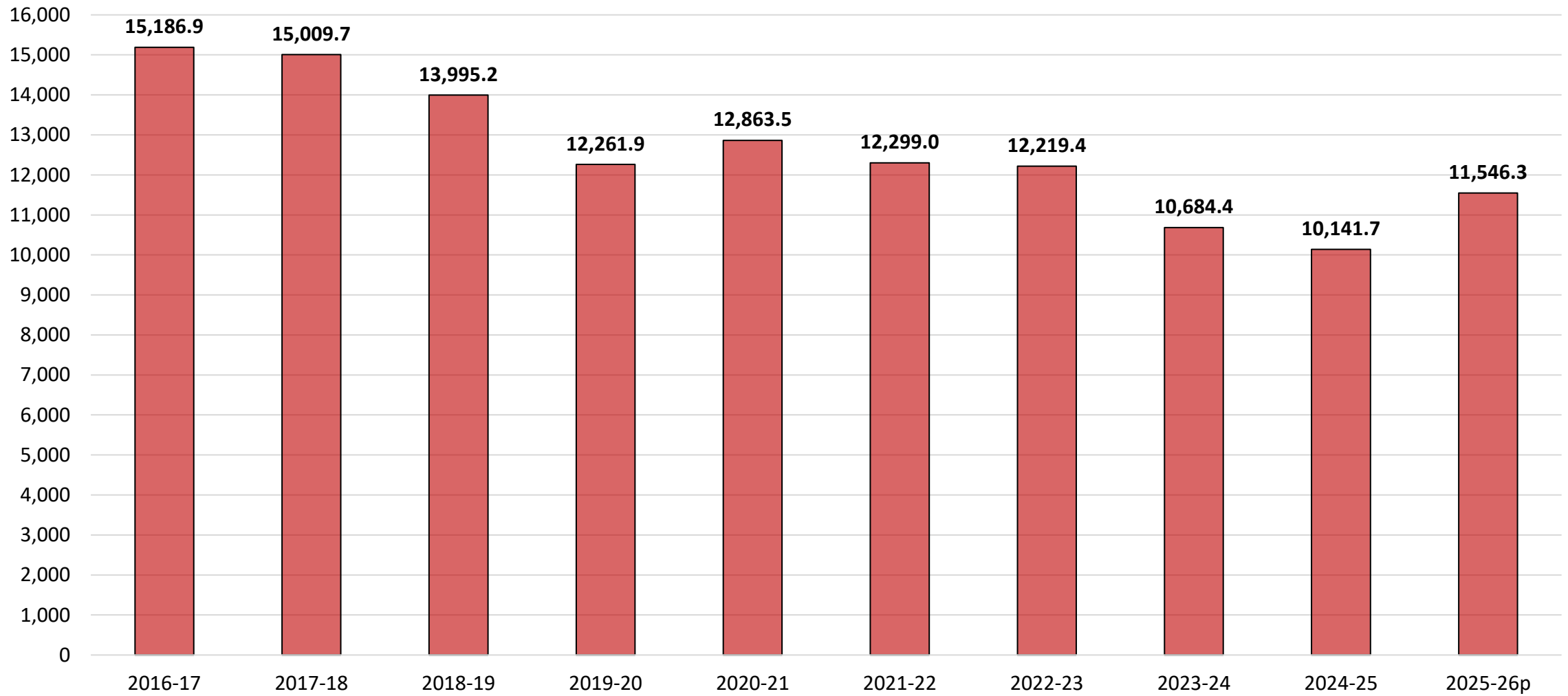




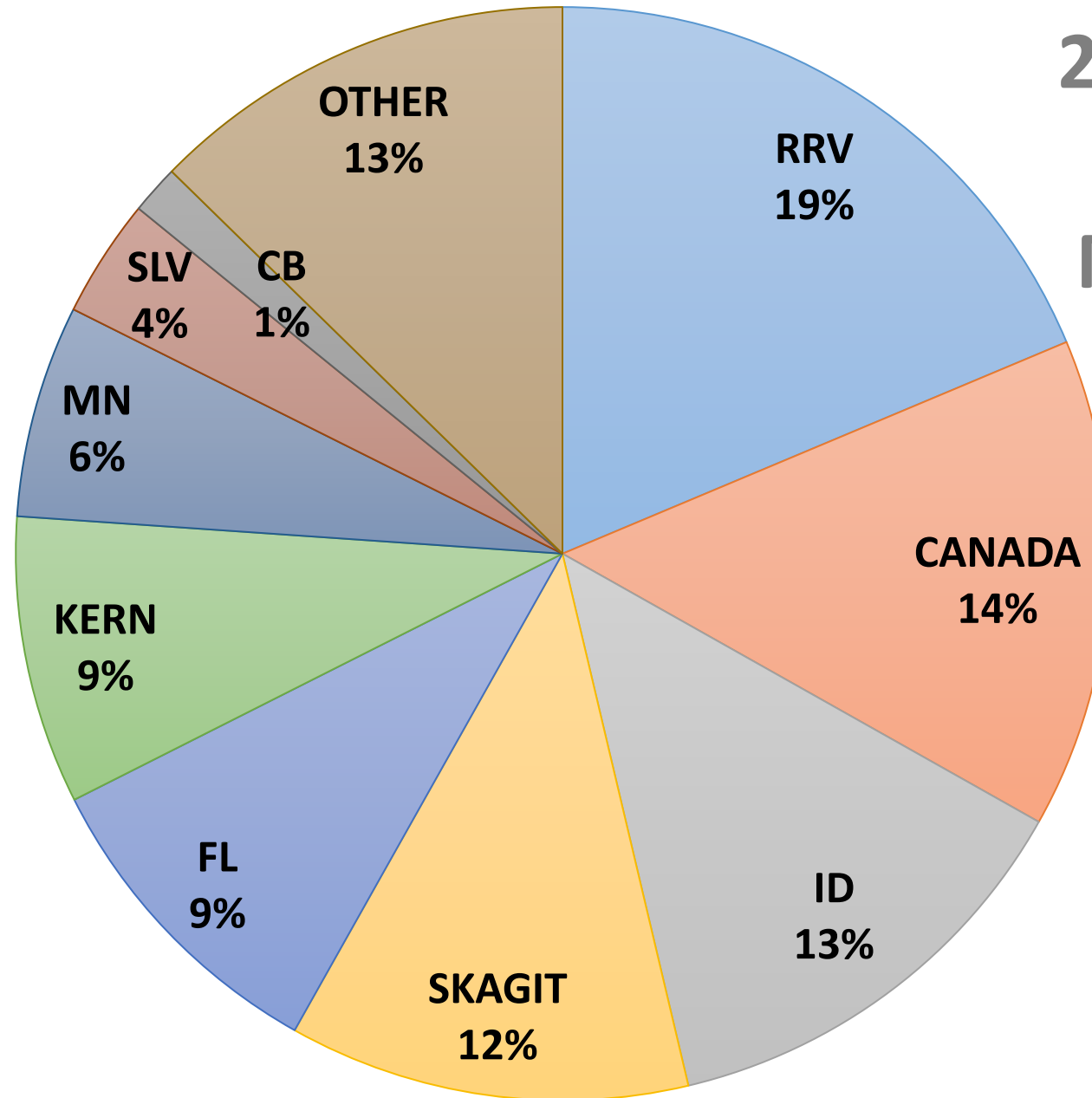
Red Potatoes

000 cwt

US Fresh Red-Potato Shipments



2025-26 Fresh Red Potato Market Share

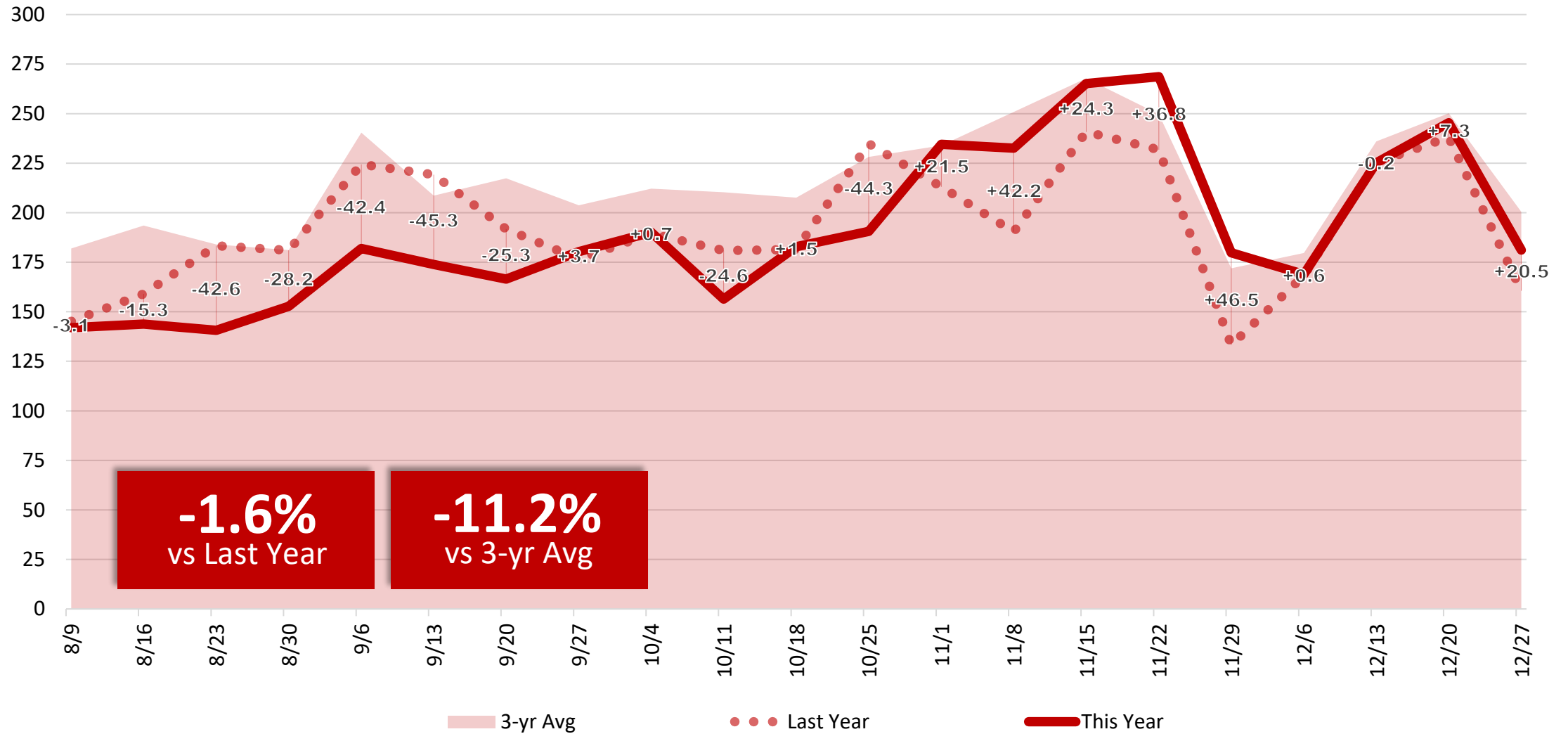


Projected Total
Fresh Red
Shipments:
11,546,300 cwt



000 cwt

Red Potato Tracker - 2025-26 to Date



-1.6%
vs Last Year

-11.2%
vs 3-yr Avg

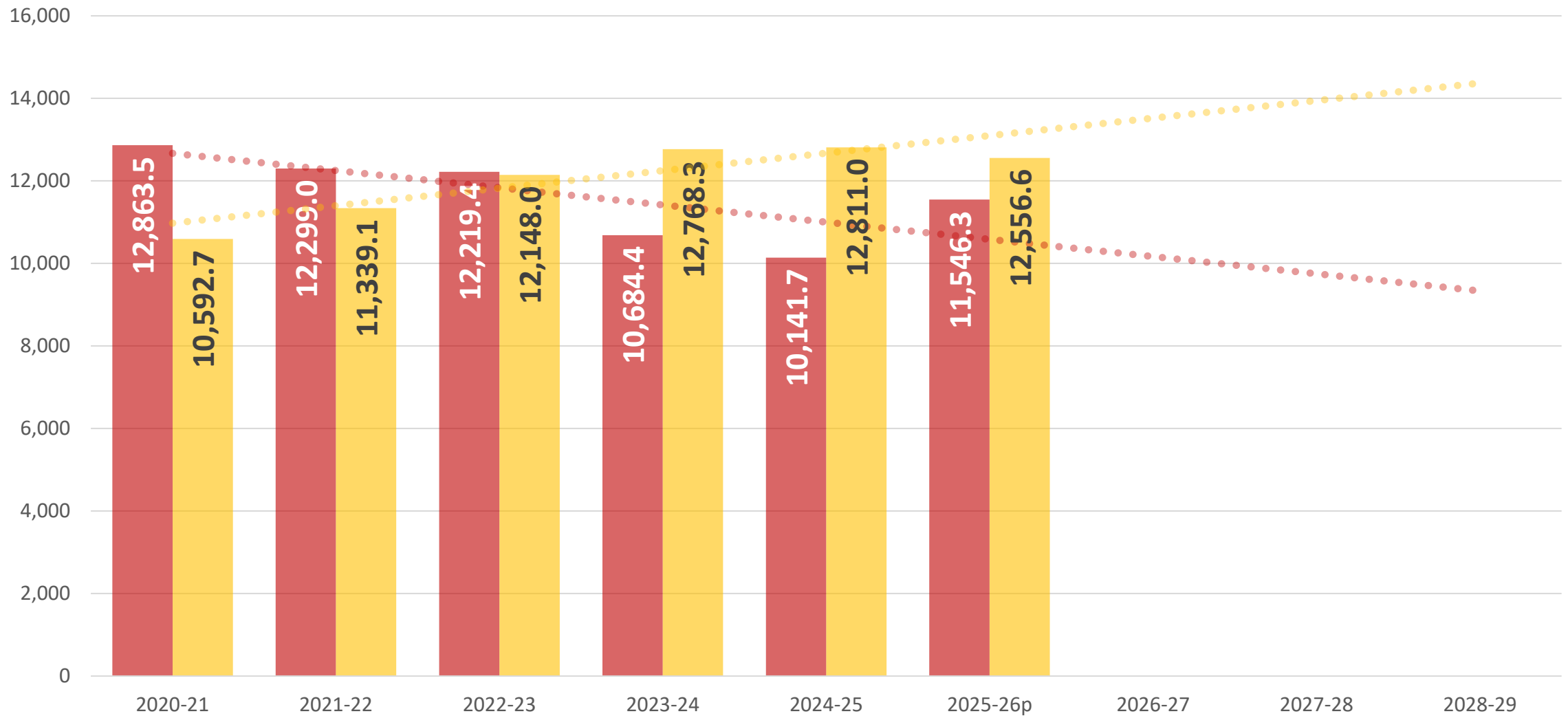
Red-Potato Supply Data

- 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 (2nd 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

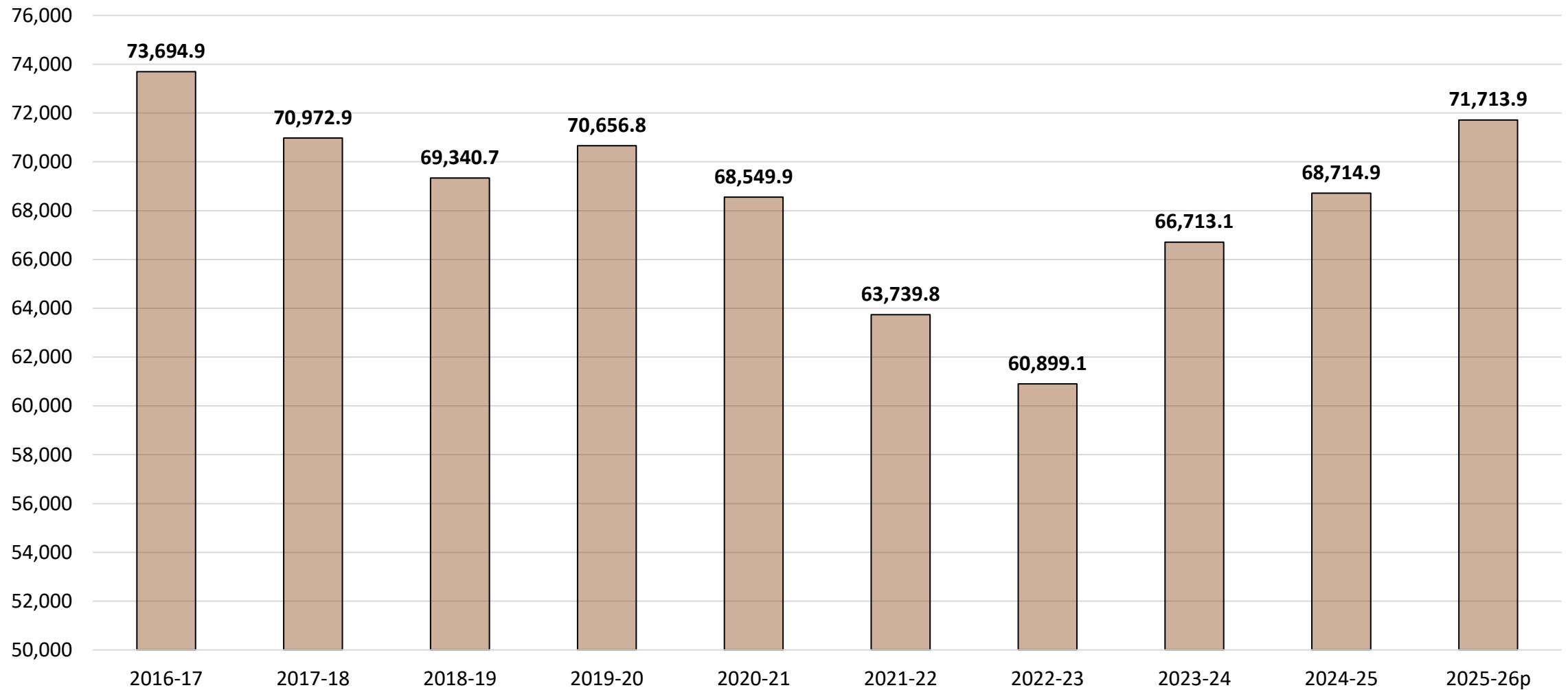




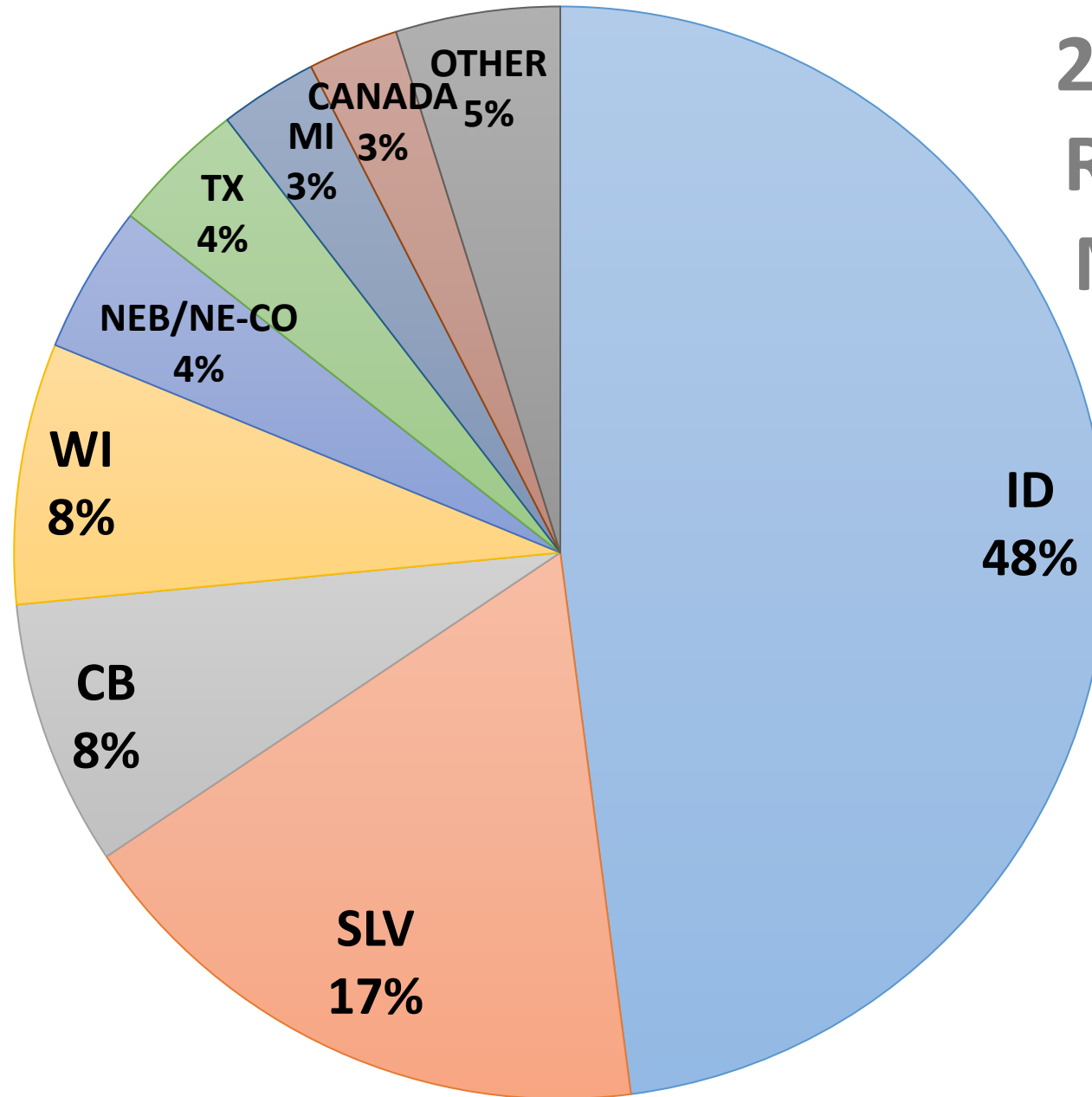
Russet Potatoes

000 cwt

US Fresh Russet-Potato Shipments

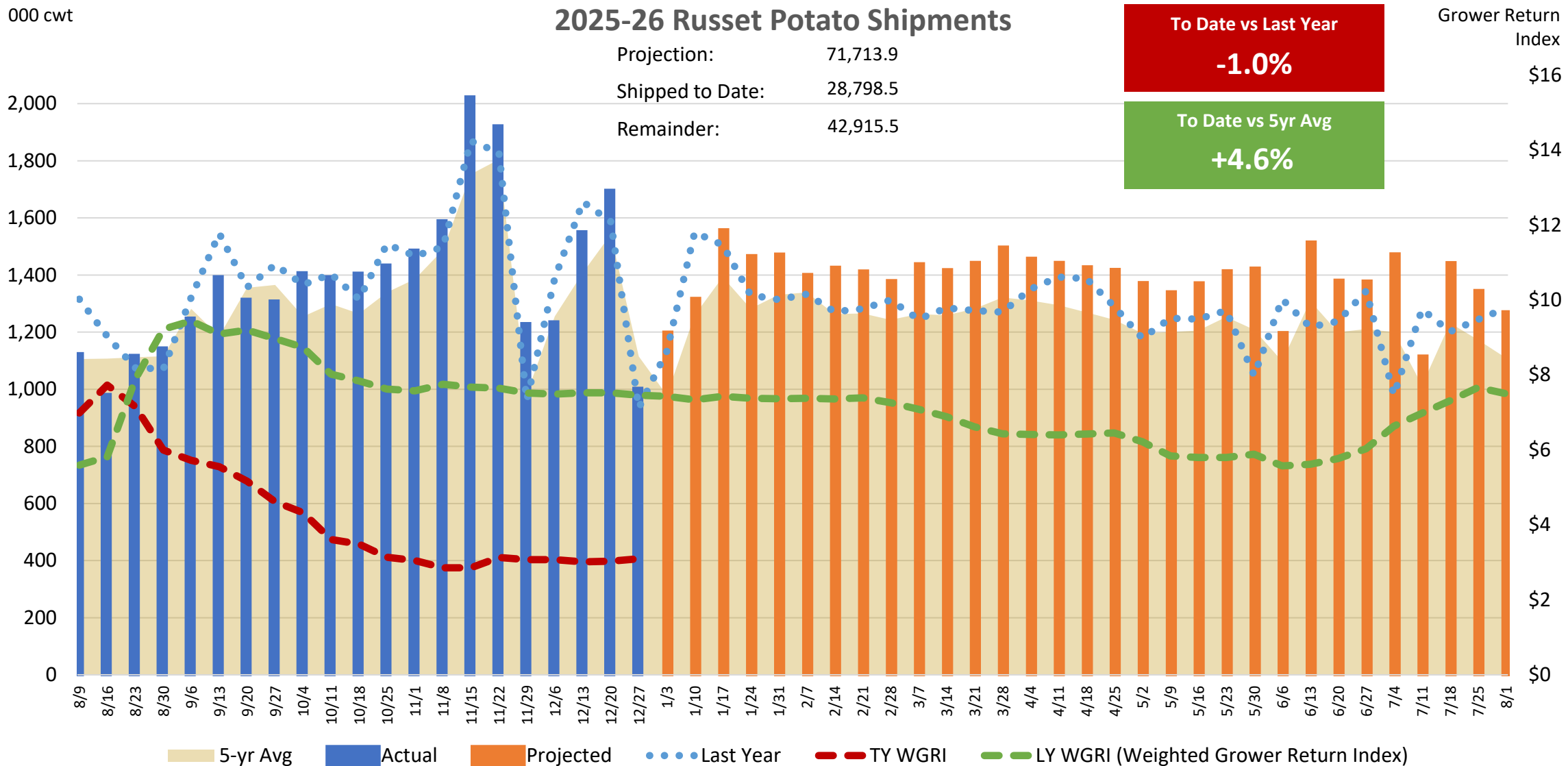


2025-26 Fresh Russet Potato Market Share



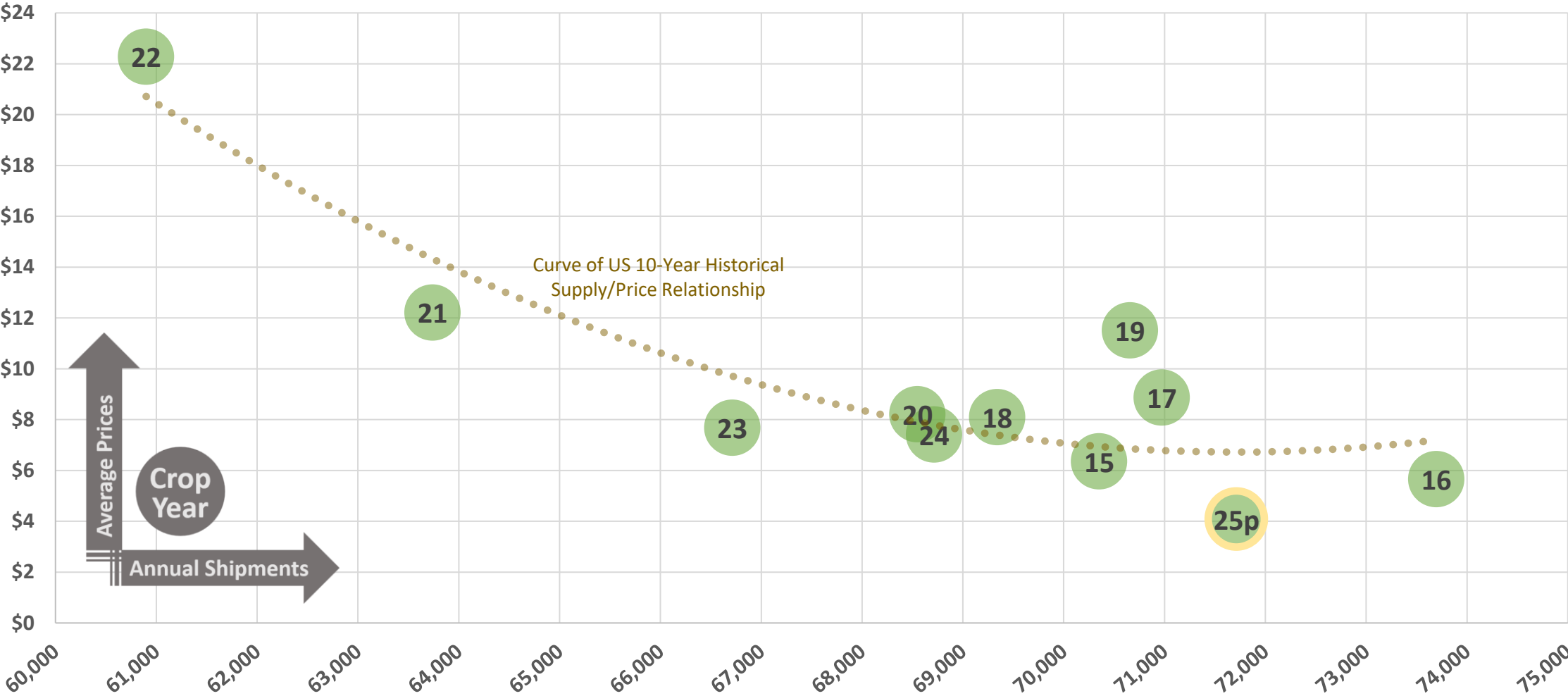
Projected Total
Fresh Russet
Shipments:
71,713,900 cwt





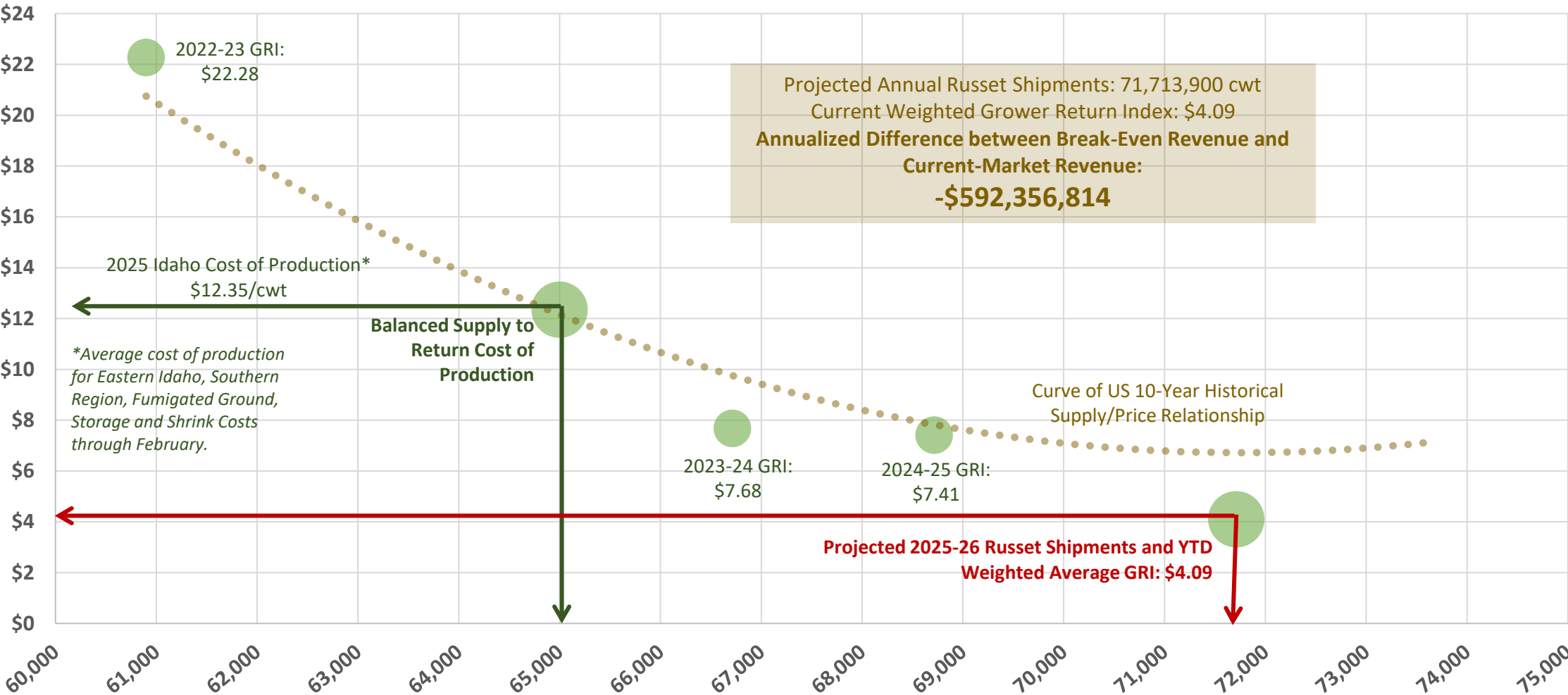
Relationship Between US Russet Shipments (supply) and Price (weighted GRI)
for a Break-Even Supply and Current-Actual Supply Based on a 10-Year History

Updated
12/27/2025



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for a Break-Even Supply and Current-Actual Supply Based on a 10-Year History

Updated
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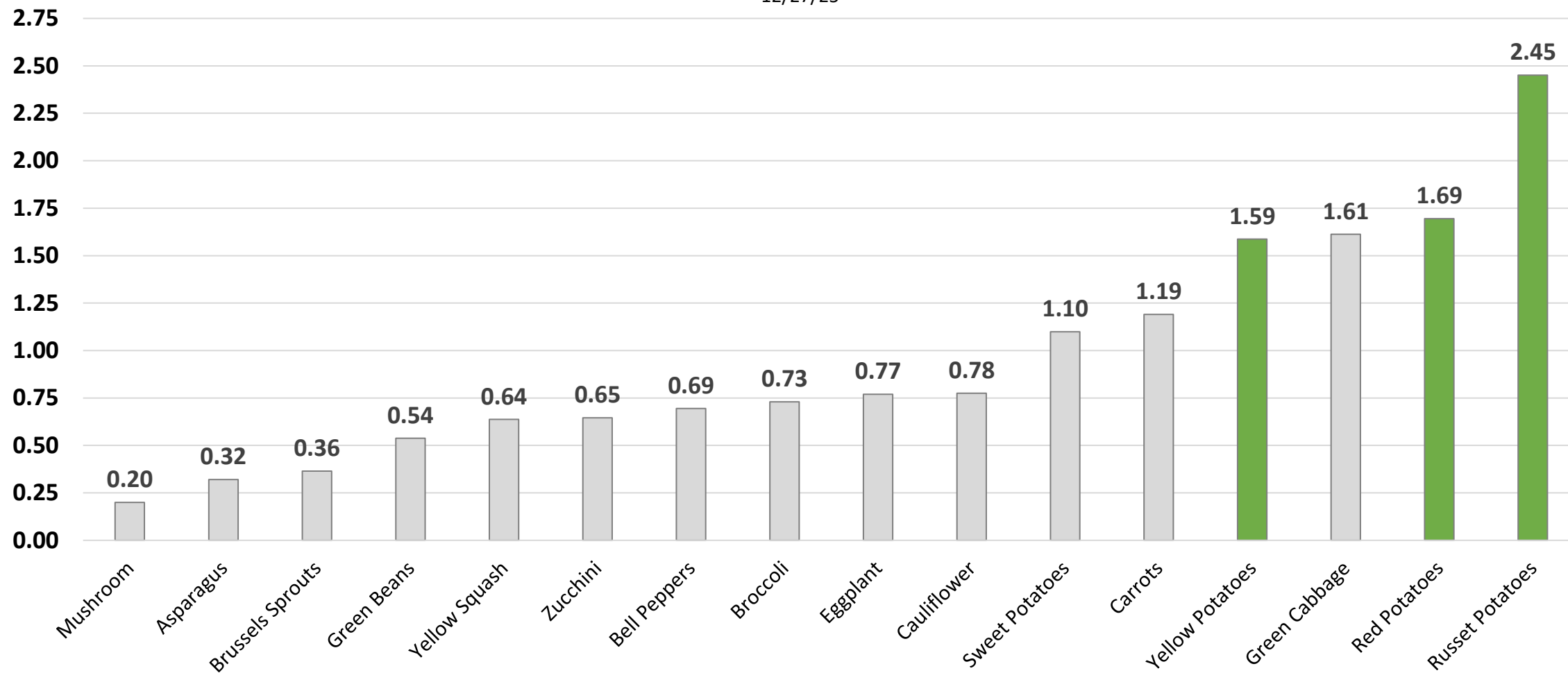
LBS PER
DOLLAR

\$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



A wicker basket filled with brown potatoes sits on a rustic wooden surface. The potatoes are of various sizes and shapes, with a rough, brown skin. The basket is made of dark, woven wicker. The background is a wooden surface with horizontal planks. The text "2026 OUTLOOK" is overlaid in the center of the image.

2026 OUTLOOK

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