

# 2026 Potato Business Summit



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# Challenges Remain...uncertainty is the new normal



**Global Conflicts**



**Economic  
uncertainty**



**Tariffs &  
Consumer  
Confidence**



**Environmental  
impact and  
climate volatility**

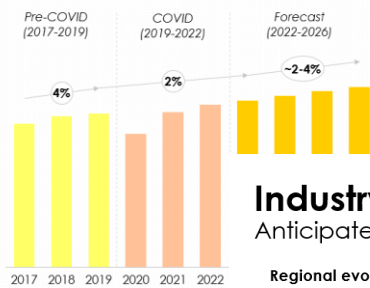
# Industry capacity growth outlook

## 2024 outlook to 2026 reality

### Industry demand growth outlook

Anticipate ~2-4% annual demand growth through 2026

#### Global frozen potato consumption

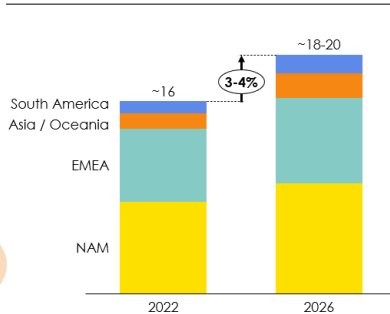


- Pre-COVID experienced strong demand (~4%) driven by growth in developed markets and increased penetration in emerging markets
- COVID shock triggered global demand slump; fewer instances of frozen potato consumption as dining out occasions reduced
- Several trends supporting sustained growth:
  - Continued expansion of fast-food restaurants, many top players have increased projected

### Industry capacity growth outlook

Anticipate ~3-4% annual capacity growth through 2026

#### Regional evolution of global capacity (000's, kT)



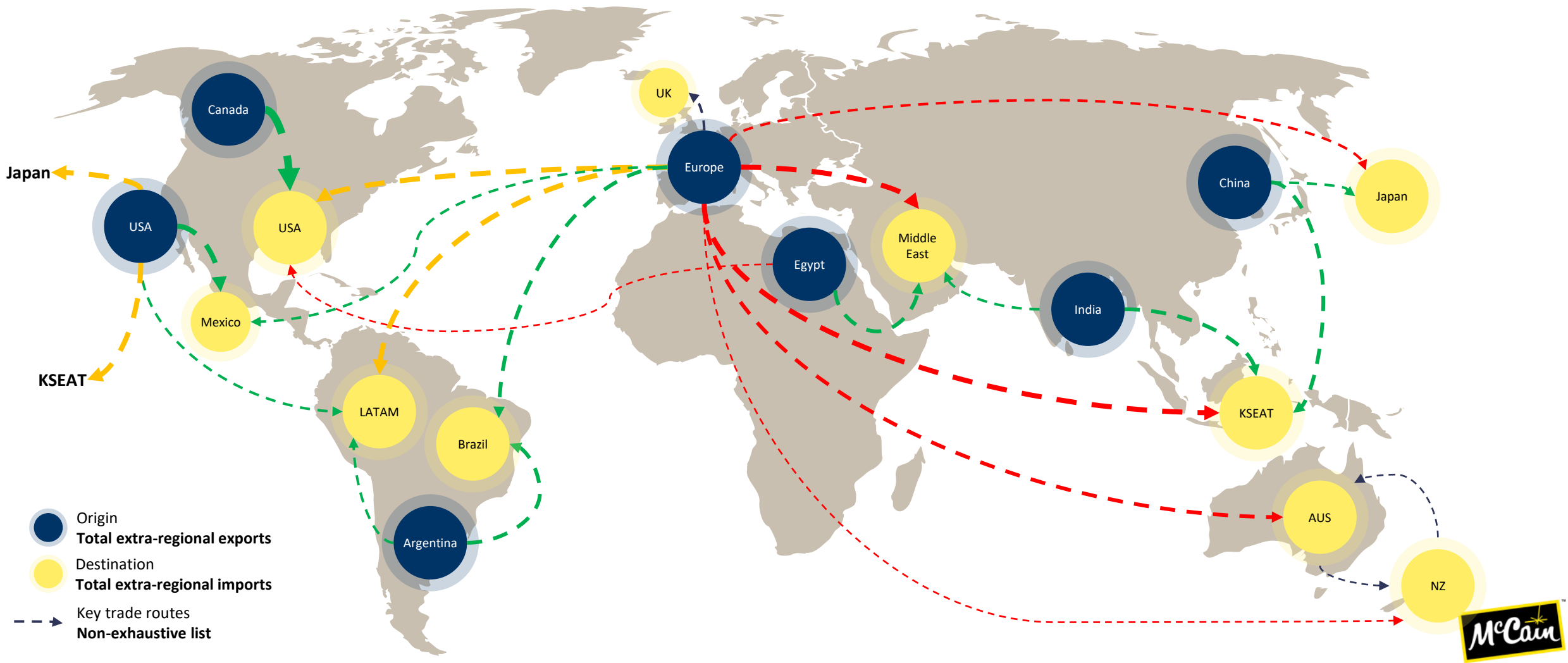
- Demand and capacity will stay largely balanced, with possibility for capacity to outpace growth depending on how quickly projects come online
- Capacity additions will be global in nature: expect new capacity to come online in most regions around the world
- Further capacity additions likely beyond 2027, dependent on consumption growth in the coming years



- **Demand softness** is being seen within North American & Europe with growth still being achieved in emerging markets
- **Faster Capacity additions globally**, India & China adding capacity to support domestic markets with Europe and NA also continuing to see capacity come online earlier than planned
- **Imbalance creating pressure on historic trade routes:** switch of demand and capacity is resetting established markets

# Export - Frozen Potato trade routes

Emerging markets significantly impacting trade flows

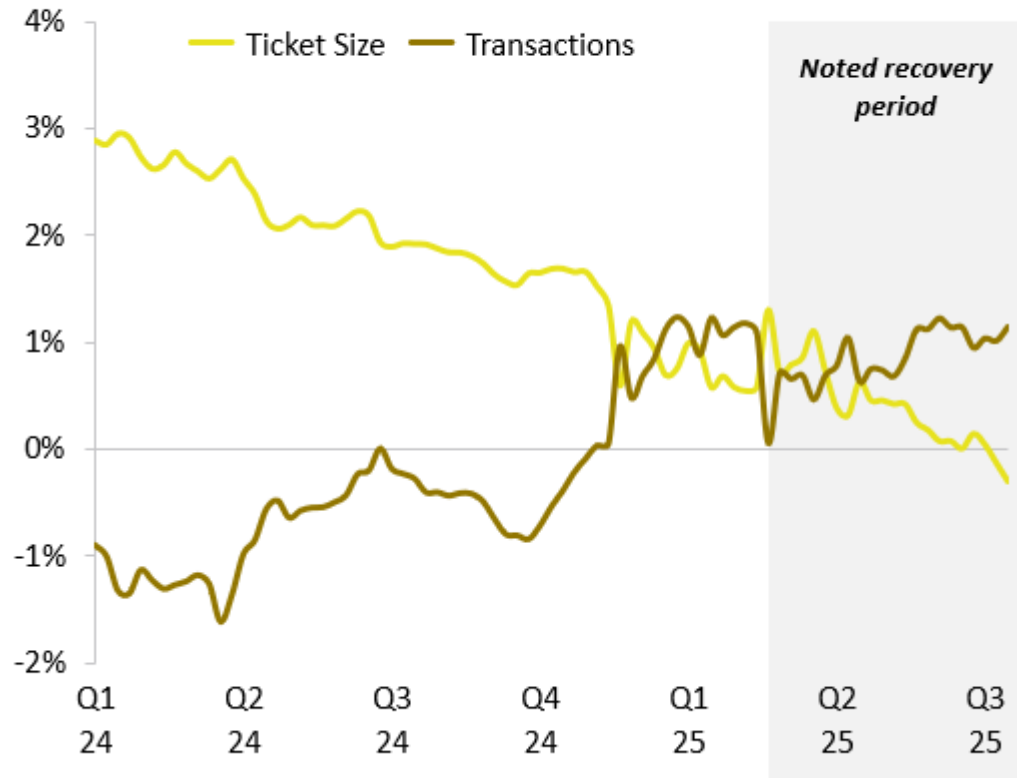




# Domestic market requiring balance for value and volume

Market begins to stabilize but no bounce back

YoY Change (%), transactions vs. ticket size, US Burger & Chicken chains, Q1 24 – Q3 25



- **Traffic Down, Checks Up:** Consumers are visiting less often but spending more per visit
- **Confidence Under Pressure:** U.S. consumer confidence dropped 22% YoY and 0.18% MoM. Canadian consumers mirror caution, households reporting heightened sensitivity to price pressure and labor market concerns
- **Heightened Value Focus:** Consumers are more selective, seeking out deals and perceived value. Operators must prioritize margin protection, operational execution, and sharp value messaging to remain competitive



## The Final Word

# One Potato industry



**Protect**  
Domestic & Export



**Promote**  
Quality & Food Safety



**Partner**  
Continuous Improvement

