North American Potato Market News

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EXECUTIVE SUMMRY

- ***Canada's February 1 potato stocks fell 1.26 million cwt short of year-earlier holdings.*** However, February holdings are the second-largest on record (behind 2022). Manitoba and Alberta were the only provinces with more potatoes in storage than they had a year ago. Table potato stocks are down, while processing and seed potato stocks are up.
- ***Canada's January potato disappearance exceeded year-earlier movement by 976,000 cwt.*** Strong usage in Manitoba and PEI accounted for most of the gain. Increased disappearance in Ontario and Alberta was partially offset by reduced movement from New Brunswick and British Columbia.
- ***Canadian table potato disappearance totaled 2.90 million cwt during January, a 23.8% increase.*** February 1 table potato stocks fell 2.72 million cwt below 2022 holdings. Table potato supplies are down 3.3 million cwt in the four eastern provinces, while supplies are in the Prairie Provinces and British Columbia are up 558,000 cwt, relative to 2022 levels.
- ***Canadian fry plants used approximately 3% more potatoes during January than they used the previous year.*** The four major French Fry producing provinces held 37.0 million cwt of processing potatoes on February 1. That is up 4.4% from last year. Most of the extra potatoes are located in Alberta. Contract negotiations are underway in several provinces.
- ***Chip potato supplies in Ontario and Quebec should be adequate to carry the industry through the storage season.*** Processing supplies (chip and frozen) in the two provinces are 16.3% larger than the five-year average inventory.
- ***Canada's February 1 seed potato inventory is 308,000 cwt more than the 2022 supply.*** Most of the extra seed is in Manitoba, though supplies also are up in PEI, Ontario, and Alberta. Seed supplies for frozen processing varieties could be tight.
- ***The US exported 7.1% more potatoes and potato products during December than it did a year earlier.*** At 6.03 million cwt (raw product equivalent), December exports exceeded 2021 sales by 401,000 cwt.
- ***The value of December potato imports exceeded the value of exports by $31.09 million.*** The cumulative net import value for the 2022 calendar year totaled $344.59 million, up 136.8% from the previous year.
- ***The US exported a record volume of fresh potatoes during December.*** Most of the growth came in sales to Mexico, which jumped by 86.8%, to 388,000 cwt.
- ***US December exports of French Fries and other frozen products nearly matched the 2021 sales volume.*** Frozen product imports exceeded exports by 95.63 million lbs.
- ***North American fourth quarter frozen product exports exceeded the 2021 sales volume by 13.1%.*** US offshore exports increased by 9.6%, while Canada's offshore exports climbed 33.6%. North American French Fry sales to Mexico surged 31.5%, during the fourth quarter. Exports to the Philippines, the Middle East region, Malaysia, and other markets in the Western Hemisphere also increased significantly.

CANADA'S FEBRUARY 1 POTATO STOCKS DOWN 1.8%

Canadian storages held 67.16 million cwt of potatoes on February 1. That is 1.26 million cwt less than they held a year earlier, a 1.8% decline. Current holdings fell below 2022 levels in all provinces except Manitoba and Alberta. However, February 1, 2023 inventories exceeded the five-year average by 10.8%. Intended use data indicate that this year's reduction is in the table potato sector. Table potato stocks dropped by 2.72 million cwt, or 16.5%. Potatoes intended for processing increased by 1.16 million cwt, or 2.7%. Seed potato inventories rose by 3.1%. The table below shows a four-year history of February 1 potato stocks, by province.

CANADIAN POTATO STOCKS: FEBRUARY 1
(Million Cwt)

	2020	2021	2022	2023	Change
PEI	15.491	12.948	19.433	17.571	-9.6%
New Brunswick	9.001	6.185	9.843	9.005	-8.5%
Ttl Maritimes	**24.492**	**19.133**	**29.276**	**26.576**	**-9.2%**
Quebec	6.838	6.536	8.383	7.503	-10.5%
Ontario	3.365	3.787	4.670	4.063	-13.0%
Manitoba	10.504	12.823	12.848	13.058	1.6%
Alberta	14.051	12.448	12.673	15.575	22.9%
Ttl Prairies	**24.555**	**25.272**	**25.521**	**28.633**	**12.2%**
B Columbia	0.526	0.621	0.572	0.388	-32.2%
Ttl Canada	**59.776**	**55.349**	**68.422**	**67.163**	**-1.8%**

Source: Agriculture and Agrifoods Canada - *Infohort*

Canada's January potato disappearance totaled 10.99 million cwt. That exceeded year-earlier usage by 976,000 cwt, or 9.7%. Manitoba and PEI posted large increases in usage during January. Ontario and Alberta also posted strong disappearance. New Brunswick, Quebec, and British Columbia reported reduced usage during the month. January table potato usage increased by 23.8%, to 2.90 million cwt. At 7.67 million cwt, January processing use rose by 5.1%, relative to 2022 usage. Seed potato disappearance totaled 430,000 cwt. In the remainder of this article we review Canadian stocks and usage patterns by growing area and by intended use.

CANADIAN POTATO DISAPPEARANCE - JANUARY
(Million Cwt)

	2020	2021	2022	2023	Change
PEI	2.059	2.072	1.816	2.249	23.8%
New Brunswick	1.293	0.876	1.524	1.432	-6.0%
Ttl Maritimes	**3.352**	**2.948**	**3.340**	**3.681**	**10.2%**
Quebec	1.148	1.067	1.165	1.145	-1.7%
Ontario	0.651	0.685	0.730	0.860	17.8%
Manitoba	1.736	1.745	1.996	2.447	22.6%
Alberta	1.971	2.263	2.623	2.735	4.3%
Ttl Prairies	**3.707**	**4.008**	**4.619**	**5.183**	**12.2%**
B Columbia	0.149	0.126	0.163	0.124	-23.9%
Ttl Canada	**9.007**	**8.834**	**10.017**	**10.993**	**9.7%**

Derived from *Ag Canada* stocks data

PEI: Island growers held 17.57 million cwt of potatoes in storage on February 1. That is 1.86 million cwt less than year-earlier holdings, a 9.6% decline. It is PEI's second-largest February 1 inventory since 2007, behind last year. January disappearance increased by 433,000 cwt, to 2.25 million cwt. Intended use data put table potato supplies at 5.17 million cwt. That is 2.20 million cwt less than the year-earlier inventory, a 29.9% reduction. January table potato disappearance exceeded 2022 usage by 428,000 cwt, reaching 965,000 cwt. That is the strongest January table potato usage since 2011. Growers have shipped heavily into the US and other provinces during the past two months. If the December usage pace continues, the remaining table potato supplies would last through July 16. At 10.73 million cwt, the Island's February 1 processing inventories are up 268,000 cwt, or 2.6%, from last year. At 1.26 million cwt, January processing use matched the 2022 pace. If the January usage rate continues, those potatoes would last through October 22. Local plants are running at capacity. Extra processing potatoes are being shipped to plants in western Canada, and some have been diverted to the table potato market. Island growers also had 1.67 million cwt of seed potatoes in storage, 71,000 cwt more than they held a year earlier.

New Brunswick: February 1 potato stocks fell 838,000 cwt short of the year-earlier inventory, to 9.01 million cwt, an 8.5% decline. At 1.43 million cwt, January disappearance dropped 92,000 cwt below 2022 usage. The province had 5.39 million cwt of processing potatoes left in storage on February 1, which is 512,000 cwt less than it held a year ago. At the January usage rate, those potatoes would last through June 20. At 2.00 million cwt, New Brunswick's table potato inventory is down 226,000 cwt, or 10.1%. Table potato use will need to pick up. At the January usage rate, those potatoes would last into December. Growers had 1.61 million cwt of seed in storage on February 1, down 100,000 cwt from last year.

Quebec: The province had 7.50 million cwt of potatoes in storage on February 1. That fell 880,000 cwt short of year-earlier holdings, a 10.5% decline. January disappearance totaled 1.15 million cwt. That is 20,000 cwt less than year-earlier movement. Intended use data show that table potato disappearance fell by 73,000 cwt, to 683,000 cwt. At that pace, Quebec's table potatoes would be cleaned up by June 24. Processing potato use climbed 58,000 cwt above 2022 movement, to 453,000 cwt. At the January usage rate, the remaining processing potatoes would last through September 7. Quebec also had 1.13 million cwt of seed potatoes in storage on February 1. That is 259,000 cwt less than it held a year earlier.

Ontario: At 860,000 cwt, January potato disappearance climbed 130,000 cwt above 2022 usage. That left Ontario with 4.06 million cwt of potatoes in storage on February 1, which is 607,000 cwt less than the year-earlier inventory, a 13.0% reduction. That includes 3.04 million cwt of chip potatoes. At 630,000 cwt, the province's chip potato disappearance exceeded the 2022 pace by 142,000 cwt. January processing potato disappearance was the largest on record. At that usage rate, Ontario's chip potatoes would last through the end of June. The province also had 826,000 cwt of table potatoes in storage, 313,000 cwt less than last year. At the January usage pace, those potatoes would be cleaned up by June 22. Ontario growers held 198,000 cwt of seed on February 1.

Manitoba: The province had 13.06 million cwt of potatoes left in storage on February 1. That is 210,000 cwt more than it held a year earlier, a 1.6% increase. Manitoba's January disappearance jumped 22.6% above last year's pace, to 2.45 million cwt. That is the strongest January disappearance on record. Processing potato disappearance increased by 322,000 cwt, relative to the 2022 pace, to 2.16 million cwt. That left Manitoba with 9.77 million cwt of processing potatoes on February 1, 681,000 cwt less than the 2022 inventory. If the January usage pace continues, those supplies would last through June 20. Processors have been supplementing local supplies with potatoes from Alberta, Saskatchewan, and North Dakota. Manitoba also had a record 1.30 million cwt of table potatoes in storage, 372,000 cwt more than it held a year ago. At the January usage rate, those potatoes would last through June 21. The province had 1.99 million cwt of seed in storage on February 1, up 519,000 cwt from last year.

Alberta: At 15.58 million cwt, Alberta had 2.90 million cwt more potatoes in storage on February 1 than it held a year earlier, a 22.9% increase. That included 2.49 million cwt more processing potatoes than were in storage a year earlier. Processing potato disappearance fell 63,000 cwt short of the 2022 pace. At the January usage rate, Alberta's processing potatoes would last through July 25. Processing supplies appear to be adequate. Plants are running at capacity. At a record 986,000 cwt, the province's table potato stocks exceeded the 2022 inventory by 313,000 cwt. At January's accelerated usage rate, the remaining table potato inventory would last through April 10. At 3.45 million cwt, the province's seed potato stocks exceeded the February 2022 inventory by 97,000 cwt.

British Columbia: The province had 388,000 cwt of potatoes in storage on February 1. That is 184,000 cwt less than it held a year earlier, a 32.2% decline. The province held 302,000 cwt of table potatoes, down 127,000 cwt from year-earlier holdings. It also had 86,000 cwt of seed potatoes. That is 57,000 cwt less than 2022 stocks. It is the smallest February 1 seed inventory since 2011.

Intended use data highlight challenges facing the Canadian potato industry in the coming months. The table below contains a four-year history of February 1 potato stocks and January disappearance by intended use. In the text that follows, we review the situation for each of the major industry sectors.

CANADIAN POTATOES: INTENDED USE DATA

(Million Cwt)

February 1 Stocks by Intended Use

	2020	2021	2022	2023	Change
Fresh	11.172	11.038	16.475	13.753	-16.5%
Processing	38.938	35.289	42.117	43.271	2.7%
Seed	9.666	9.021	9.831	10.139	3.1%
Total	**59.776**	**55.349**	**68.422**	**67.163**	**-1.8%**

January Disappearance by Intended Use

	2020	2021	2022	2023	Change
Fresh	2.419	2.348	2.339	2.896	23.8%
Processing	6.280	6.153	7.298	7.667	5.1%
Seed	0.308	0.333	0.380	0.430	13.2%
Total	**9.007**	**8.834**	**10.017**	**10.993**	**9.7%**

Source: Agriculture and Agrifoods Canada - *Infohort*

Table potatoes: Canada had 13.75 million cwt of table potatoes left in storage on February 1. That is 2.72 million cwt less than it held a year earlier, a 16.5% decline. However, it is the second-largest February 1 inventory on record (behind 2022). It is 15.7% more than the five-year average inventory. The eastern provinces had 11.16 million cwt of potatoes in storage on February 1, 3.28 million cwt less than the 2022 inventory, a 22.7% decline. On the other hand, the Prairie Provinces and British Columbia held a combined 2.59 million cwt of table potatoes on February 1. That is 558,000 cwt, or 27.5% more than year-earlier stocks. Overall, Canada's January usage rate would clean up this year's supplies by June 27. The 23.8% increase in January table potato disappearance is due to strong movement from PEI, Manitoba, and Alberta.

Frozen processing: The four major French Fry producing provinces held 37.03 million cwt of processing potatoes on February 1. That is 1.57 million cwt more than the year-earlier inventory, a 4.4% increase. Almost all the extra supplies are in Alberta. January disappearance exceeded the 2022 pace by 370,000 cwt. At that rate, this year's storage potatoes would last through July 25. Contract negotiations are just getting underway in several provinces.

Chip potatoes: Inventories are down from last year's record in both Ontario and Quebec. However, supplies should be adequate to carry the industry through the storage season. February 1 chip potato stocks are the second-largest on record. January processing use exceeded the 2022 pace in Ontario and Quebec by 29.1% and 14.7%, respectively.

Seed potatoes: Canada had 10.14 million cwt of seed potatoes in storage on February 1. That is 308,000 cwt more than it held a year earlier, a 3.1% increase. Extra seed in Manitoba, Alberta, PEI, and Ontario more than offset reduced supplies in New Brunswick, Quebec, and British Columbia. Reports indicate that seed supplies for some frozen processing varieties could be tight this year.

DECEMBER POTATO EXPORTS UP 7.1%

The US exported 6.03 million cwt of potatoes and potato products (raw product equivalent) during December. That exceeded year-earlier sales by 401,000 cwt, a 7.1% increase. It is 0.4% larger than the three-year average export volume. Reduced frozen product and potato chip sales were offset by double-digit percentage increases in fresh potato and dehydrated product exports.

US POTATO EXPORTS: DECEMBER

(Million Lbs)

	2019	2020	2021	2022	Change
Fresh	66.22	68.37	86.43	92.24	6.7%
Frozen	188.05	175.56	153.51	153.12	-0.3%
Dehydrated	27.92	23.40	21.75	27.83	28.0%
Chips	8.43	9.02	9.80	9.45	-3.6%
Total *	**643.56**	**596.01**	**563.15**	**603.25**	**7.1%**
Net Frozen	-0.87	-16.86	-77.78	-95.63	

Source: US Census Bureau *Raw Product Equivalent

The value of December potato imports exceeded the value of exports by $31.09 million. That is the largest December potato product trade deficit on record. The cumulative net import value during calendar year 2022 totaled $344.59 million, $199.06 million more than the cumulative net import value during 2021.

The US exported a record 922,400 cwt of fresh potatoes during December. That exceeded year-earlier shipments by 58,000 cwt, a 6.7% increase. Most of the increase came in shipments to Mexico, the largest fresh potato customer. The country took a record 388,000 cwt of fresh potatoes (table and chipstock) during December. That is 180,000 cwt, or 86.8% more than Mexico's year-earlier purchases. Fresh potato shipments to Canada fell by 6.7%. Japan and South Korea reduced their fresh potato purchases by 2.4% and 53.2%, respectively.

Fryers exported 153.1 million lbs of French Fries and other frozen potato products during December. That is 392,000 lbs less than they exported a year earlier, a 0.3% decline. Frozen product imports exceeded exports by 95.63 million lbs during December. That is up from 77.78 million lbs of net imports a year ago.

At 27.83 million lbs, December dehydrated potato product exports exceeded year-earlier sales by 28.0%. The exports included 15.85 million lbs of potato flakes and 11.98 million lbs of other products. Potato flake exports climbed by 26.4%. Starch exports jumped by 46.6%, while granule exports more than doubled. Imports of dehydrated products other than starch rose 27.4% above year-earlier purchases, to 19.88 million lbs.

The US exported 9.45 million lbs of potato chips (mostly product fabricated from potato flakes) during December. That fell 357,000 lbs short of year-earlier sales, a 3.6% decline.

4TH QUARTER OFFSHORE FROZEN EXPORTS UP 13.1%

North American fryers sold 598.8 million lbs of frozen potato products, including French Fries, to customers outside of the US and Canada during the fourth quarter. That is 69.4 million lbs more than they shipped a year earlier, a 13.1% increase. Most North American French Fry plants are owned by companies with processing capacity on both sides of the border. Trade between the two countries is used to minimize costs. Logistical issues usually make it cheaper to export US product to Pacific Rim customers. US supply gaps are often covered with product from Canada.

US fryers exported 521.0 million lbs of frozen potato products during the fourth quarter. That is 35.9 million lbs more than they exported a year earlier, a 7.4% increase. Shipments to Canada fell by 23.9%, to 24.5 million lbs. At 496.4 million lbs, US offshore exports rose by 43.6 million lbs, 9.6% above year-earlier sales. Japan, the largest customer, reduced its purchases by 4.0%, to 124.4 million lbs. Mexico and the Philippines increased fourth quarter purchases by 25.5 million lbs and 10.7 million lbs, respectively. The largest sales drop was to China, down 12.6 million lbs, or 35.7%. The table below shows a four-year history of US frozen product exports by major destination.

US FROZEN POTATO EXPORTS: OCTOBER-DECEMBER

(Million Lbs)

	2019	2020	2021	2022	Change
Japan	145.03	136.38	129.48	124.35	-4.0%
Mexico	70.56	91.55	86.58	112.09	29.5%
South Korea	53.14	57.46	47.45	47.43	0.0%
Philippines	50.03	22.89	28.33	39.05	37.8%
Canada	32.78	24.80	32.23	24.53	-23.9%
Malaysia	32.28	22.71	17.40	23.79	36.8%
China *	48.71	46.02	35.13	22.58	-35.7%
Taiwan	29.69	30.22	24.16	22.34	-7.5%
Saudi Arabia	24.50	15.06	13.14	21.12	60.8%
Guatemala	12.99	15.35	16.00	19.84	24.0%
Indonesia	13.15	7.37	5.03	12.43	147.2%
America †	21.41	16.86	15.60	12.04	-22.8%
Singapore	14.80	13.98	10.51	11.30	7.6%
Australia	12.92	5.65	2.97	8.40	182.4%
El Salvador	5.74	5.29	6.09	7.22	18.6%
Asia-Pacific †	21.51	14.22	9.92	6.46	-34.9%
Middle East †	6.47	5.65	4.07	5.31	30.6%
Other	3.39	1.08	0.96	0.67	-30.0%
Total	**599.09**	**532.53**	**485.02**	**520.96**	**7.4%**

Source: Global Trade Atlas
* Includes Hong Kong and Macao † Not specified elsewhere

Canada exported 750.6 million lbs of French Fries and other frozen potato products during the fourth quarter. That exceeded year-earlier sales by 57.2 million lbs, or 8.2%. Most of the increase came in shipments to the US. The US accounted for 86.4% of Canada's French Fry exports. Excluding sales to the US, fourth

CANADIAN FROZEN POTATO EXPORTS: OCT-DEC

(Million Lbs)

	2019	2020	2021	2022	Change
United States	507.30	533.93	616.76	648.22	5.1%
Mexico	21.49	16.50	17.73	25.04	41.3%
Japan	11.74	10.91	16.88	19.82	17.4%
United Kingdom	0.00	0.00	0.00	15.53	-NM-
America *	9.47	7.90	8.07	9.78	21.1%
Panama	2.09	5.95	6.84	6.63	-3.1%
Taiwan	5.62	6.87	6.62	6.22	-6.1%
Middle East *	4.47	5.64	5.98	6.13	2.5%
South Korea	14.42	3.27	3.64	5.04	38.7%
Costa Rica	4.89	4.12	2.45	4.25	73.6%
Other	6.87	3.00	8.39	3.89	-53.6%
Total	**588.38**	**598.09**	**693.36**	**750.55**	**8.2%**

Source: Global Trade Atlas * Not specified elsewhere quarter exports climbed 33.6%, to 102.3 million lbs. At 15.5 million lbs, the largest increases came in sales to the United Kingdom, a new customer. Mexico increased its purchases by 7.3 million lbs, or 41.3%. Japan, South Korea, and Costa Rica also posted double-digit percentage increases. The table at the bottom of Page 3 shows a four-year history of Canadian frozen product exports.

Japan: The country imported 144.2 million lbs of North American French Fries during the fourth quarter. That fell 2.2 million lbs, or 1.5%, short of year-earlier purchases.

SHIPPING POINT PRICES: FEBRUARY 8

	Feb 8	-----Change From----- Feb 1	Last Year
Idaho Burbank			
Baled 5/10# non-A	$24.00		$6.50
40 Count	$64.00		$37.50
50 Count	$64.00		$37.50
60 Count	$53.00		$22.00
70 Count	$53.00		$22.00
80 Count	$50.00		$19.00
90 Count	$40.00		$11.00
100 Count	$36.00		$10.00
#2 - 6 oz Minimum	$31.00		$14.00
#2 - 10 oz Minimum	$50.00		$26.00
San Luis Valley			
Russet 5/10# Size A	$25.50		$8.00
Russet 40 Count	$56.00		$24.50
Russet 50 Count	$56.00		$24.50
Russet 60 Count	$56.00		$24.50
Russet 70 Count	$51.00		$19.50
Russet 80 Count	$45.00		$15.00
Russet 90 Count	$38.00		$13.00
Russet 100 Count	$38.00		$13.00
Columbia Basin			
Russet 5/10# Size A	$22.00		$6.00
Russet 40 Count	$62.00		$28.00
Russet 50 Count	$62.00		$28.00
Russet 60 Count	$56.00		$22.00
Russet 70 Count	$56.00		$22.00
Russet 80 Count	$49.00		$17.00
Russet 90 Count	$38.00		$11.00
Russet 100 Count	$34.00		$10.00
Central Wisconsin			
Russet 5/10# Size A	$29.00		$9.50
Russet 40 Count	$60.00		$26.50
Russet 50 Count	$60.00		$26.50
Russet 60 Count	$58.00		$24.50
Russet 70 Count	$56.00		$22.50
Russet 80 Count	$51.00		$20.00
Russet 90 Count	$41.00		$15.00
Russet 100 Count	$37.00		$12.00
Red 10/5# Size A	$33.00		
Red 50# Size A	$43.00		-$6.00
Red 50# Size B	$31.00		
Red River Valley			
Red 10/5# Size A	$32.50		- NA -
Red 50# Size A	$32.50		$1.50
Red 50# Size B	$41.50		$0.50
Red 50# Creamers	$64.00		$2.00
Red 2000# Size A	$24.50		-$0.50
Yellow 50# Creamers	$62.00		
Yellow 2000# Size A	$25.50		$0.50
Michigan			
Russet 5/10# Size A	$33.00		$10.00

Source: Federal-State Market News. Midpoint of "mostly" range.
All prices are $/Cwt basis. NA = Not Available. Blanks signify no change.

RUSSET TABLE POTATO PRICE INDICES: FEBRUARY 8

	Feb 8	-----Change From----- Feb 1	Last Year
Fresh Weighted Average			
Idaho Burbank	$36.16		$13.60
Idaho Norkotah	$35.69	-$0.08	$13.17
San Luis Valley	$32.93		$11.52
Columbia Basin	$37.29		$13.05
Wisconsin	$35.13		$12.41
Grower Returns Index			
Idaho Burbank	$18.99		$8.39
Idaho Norkotah	$21.76	-$0.06	$9.67
San Luis Valley	$21.44		$9.39
Columbia Basin	$20.10		$8.07
Wisconsin	$21.97		$9.47

Derived from Market News data - $/Cwt Basis; NA = Not Available; Blanks signify no change.
Note: Prices are based on spot market sales and exclude previously contracted potatoes

Mexico: At 137.1 million lbs, Mexico's frozen product imports jumped 32.8 million lbs above year-earlier purchases. That is the country's largest fourth quarter import volume on record.

Other America: Countries in the Western Hemisphere, other than Mexico, imported 59.7 million lbs of frozen products during the fourth quarter, an 8.5% increase. The largest customers in the region were Guatemala (20.3 million lbs), Panama (8.6 million lbs), El Salvador (7.3 million lbs), and Costa Rica (7.3 million lbs).

South Korea: The country's fourth-quarter French Fry imports totaled 52.5 million lbs. That is 1.4 million lbs more than year-earlier purchases, a 2.7% increase.

Philippines: Imports of North American frozen potato products totaled 39.4 million lbs during the quarter, a 34.6% increase.

Middle East: Counties in the Middle East imported 32.6 million lbs of frozen products from North American fryers. That exceeded 2021 purchases by 9.4 million lbs, or 40.4%. Saudi Arabia increased its imports by 51.7%, to 22.4 million lbs.

Taiwan: The country imported 28.6 million lbs of French Fries from North American fryers during the fourth quarter. That fell 2.2 million lbs short of year-earlier purchases, a 7.2% decline.

Malaysia: The country imported 24.1 million lbs of frozen product during the quarter. That is 6.5 million lbs more than year-earlier purchases, a 36.9% increase.

FRESH SHIPMENTS: WEEK ENDING FEBRUARY 4
(Thousand Cwt)

	2020	2021	2022	2023	Change
Idaho	703	773	566	539	-4.7%
San Luis Valley	289	275	315	271	-13.8%
Wisconsin	114	108	159	150	-5.9%
Columbia Basin	143	145	92	106	15.8%
Michigan	60	51	68	64	-5.3%
Nebraska/NE CO	55	68	39	66	70.1%
Red River Valley	86	62	104	61	-40.8%
Texas	24	41	58	56	-3.8%
Other	144	143	124	80	-35.3%
US Total	**1,618**	**1,665**	**1,524**	**1,394**	**-8.5%**
By Type					
Russet	1,261	1,293	1,146	1,091	-4.7%
Red	165	167	172	137	-20.7%
Yellow	133	151	170	141	-17.3%
Round White	32	29	25	17	-30.8%
Other *	27	25	10	8	-26.2%

Source: Preliminary Federal-State Market News Data * Includes Long White potatoes

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EXECUTIVE SUMMARY

- ***March table potato shipments fell 305,000 cwt, or 4.9%, short of year-earlier movement.*** Increased movement from three major regions was not enough to offset Idaho's reduced movement. February 2023 fresh potato shipments fell 9.9% below the five-year average.
- ***Idaho's February shipments fell 182,000 cwt short of 2022 movement.*** Several other areas reported reduced movement during the month including Maine, Texas, the Red River Valley, Michigan, Wisconsin, and the San Luis Valley.
- ***Russet table potato shipments fell 325,000 cwt short of February 2022 movement.*** The 6.8% reduction dropped shipments to 4.45 million cwt. Strong movement from Nebraska/northeastern Colorado, the Columbia Basin, and the Klamath Basin partially offset reduced movement from Idaho, Maine, Texas, Wisconsin, and Michigan. The downturn in movement will likely continue for the remainder of the shipping season.
- ***February Red potato shipments exceeded the 2022 pace by 10.8%, at 702,000 cwt.*** All of the major shipping regions except Maine and Michigan posted strong Red potato movement during February. The February shipping pace may not be sustainable through the rest of the storage season.
- ***February Yellow potato shipments rose 1.0%, to a record 663,000 cwt.*** Florida new-crop supplies came on line, but supplies in the storage states have been cleaning up quickly.
- ***Fryers added 43.7 million lbs of finished product to freezer stocks during January.*** The five-year average January inventory build has been 67.5 million lbs. Last year, fryers increased stocks by 86.1 million lbs during January.
- ***Freezers held 113.0 million lbs more French Fries and other frozen products on January 31 than they held a year earlier.*** At 1.263 million lbs, that is a 9.8% increase. It leaves the industry with a 33.0 day supply of finished product in storage. That is the largest January 31 inventory, relative to use, since 2020.
- ***Fryers will likely reduce the year-ending inventory ahead of the 2023-crop transition.*** An average freezer stocks drawdown between January 31 and June 30 would drop stocks to a 32.0 day supply. A larger drawdown is likely this year.
- ***Preliminary data suggest that buyers purchased 6.9% less domestically produced French Fries between December 1 and January 31 than they did a year ago.*** Processors used 3.8% fewer potatoes for purposes other than dehydration. They also added 82.4 million lbs of finished product to inventory during that period.
- ***Growers in the Columbia Basin started planting this week.*** Planting also is underway in North Carolina.
- ***Processing contract negotiations are wrapping up in some areas, while they are ongoing in others.***
- ***Loaded tots are now available at Domino's Pizza.***
- ***At 4.66 million cwt, February US chip potato shipments exceeded 2022 movement by 1.2%.***
- ***Snowstorms continue to improve Idaho's water outlook.***

FEBRUARY FRESH POTATO SHIPMENTS DOWN 4.9%

US packers shipped 5.93 million cwt of fresh potatoes during February. That is 305,000 cwt less than they shipped during February 2022, a 4.9% decline. Fresh potato shipments during February were the smallest, for the month, in modern history. February 2023 movement fell 9.9% below the five-year average pace. Increased shipments from Florida, the Columbia Basin, and Nebraska/northeastern Colorado were not enough to offset reduced movement from Idaho. In addition, Maine, Texas, the Red River Valley, Michigan, Wisconsin, and the San Luis Valley posted reductions in February fresh potato movement. Russet and Round White potato shipments dropped significantly, while Red and Yellow potato sales increased. The table below shows a four-year history of February fresh potato shipments. In the remainder of this article we provide a detailed review of fresh potato shipping patterns and the supply outlook, by shipping area and by type.

US FRESH POTATO SHIPMENTS: FEBRUARY
(Thousand Cwt)

	2020	2021	2022	2023	Change
Idaho	2,577	3,002	2,428	2,246	-7.5%
San Luis Valley	1,018	1,105	1,219	1,207	-1.0%
Wisconsin	395	446	550	535	-2.7%
Columbia Basin	629	581	389	431	10.7%
Red River Valley	299	264	343	310	-9.5%
Florida	205	183	221	271	22.8%
Michigan	267	235	277	253	-8.4%
Nebraska/NE CO	226	260	179	209	16.7%
Texas	170	187	240	185	-23.0%
Kern County CA	221	190	117	118	0.7%
Other	380	313	274	166	-39.6%
US Total	**6,388**	**6,767**	**6,237**	**5,933**	**-4.9%**
By Type					
Russet	4,924	5,199	4,771	4,445	-6.8%
Red	631	773	634	702	10.8%
Yellow	531	591	657	663	1.0%
Round White	165	105	134	90	-33.0%
Other *	138	100	42	32	-24.4%

Source: Federal- State Market News * Includes Long White potatoes

Idaho: The state shipped 2.25 million cwt of potatoes during February. That fell 182,000 cwt short of last year's pace, a 7.5% decline. It is the state's slowest February shipping pace in modern history. Season-to-date shipments for Idaho's 2022 crop total 15.76 million cwt. That is 1.18 million cwt less than shipments from the 2021 crop, through the same timeframe, a 7.0% decline. Idaho's shipping pace has been slow, relative to year-earlier movement, since the 2022 crop came on line. Packers have been moving the state's crop at a reduced pace, in an effort to stretch supplies until the new crop available. Demand is strong for open-market Russets for frozen processing and dehydration. The supply outlook for the remainder of the season will depend upon the volume of potatoes diverted to processing use. Idaho's shipments will almost certainly remain below the 2022 pace for the remainder of the season. If the current shipping pace continues, Idaho packers would ship about 29.0 million cwt of potatoes from the 2022 crop. That is down from

31.2 million cwt from the 2021 crop, and 36.9 million cwt from the 2020 crop. At $35.30 per cwt, Idaho's Russet Norkotah FWA has declined by $0.47 during the past five weeks.

San Luis Valley: Packers shipped 1.21 million cwt of potatoes from the Valley during February. That fell 12,000 cwt short of February 2022 movement, a 1.0% decline. Behind last year, it is the Valley's strongest February movement since 2012. Season-to-date shipments from the 2022 crop are running 1.3% ahead of last year's pace. Stocks estimates indicate that the Valley has fewer potatoes in storage than it held at this time last year. The San Luis Valley FWA has increased by $0.80 per cwt during the past five weeks, to $33.73 per cwt.

Wisconsin: February table potato shipments totaled 535,000 cwt. That fell 15,000 cwt, or 2.7% short of year-earlier movement. This year's shipments were up 21.3% relative to the five-year average February movement. The Yellow potato shipping season is virtually complete. Yellow potato shipments from the 2022 crop totaled 633,000 cwt, 13.1% more than year-earlier shipments. Season-to-date Red potato shipments are running 0.7% ahead of the 2021/22 pace. The state has more Red potatoes in storage than it did a year ago. Russet shipments, through February, have been running 1.6% ahead of year-earlier movement. Growers have more Russet table potatoes in storage as they held a year ago. Packout rates should be better than they were for the 2021 crop. In addition, the size profile of Wisconsin's 2022 Russet table potato crop is larger than usual. Shipments will likely exceed last year's movement for the remainder of the season. Wisconsin's Russet FWA rose to $35.80 per cwt on March 1. Until this week's price increase, the state's FWA stayed at $35.13 per cwt for 13 consecutive weeks.

Columbia Basin: At 431,000, the Basin's February potato shipments exceeded year-earlier movement by 42,000 cwt, or 10.7%. Through February, shipments from the 2022 crop are up 141,000 cwt, or 3.6% from last year. Packers may have front-loaded shipments from the 2022 crop, to take advantage of strong prices. If that is the case, we should be seeing movement tail off as packing sheds run low on raw product. So far, that has not happened. Perhaps movement will drop off during the summer months. At $37.58 per cwt, the Columbia Basin's FWA has increased by $0.29 per cwt during the past five weeks.

Red River Valley: Valley wash plants shipped 310,000 cwt of table potatoes during February. That is 32,000 cwt less than they shipped during February 2022, a 9.5% decline. Red potato movement increased by 11.8%, while Yellow potato shipments dropped by 21.6%, relative to February 2022. Growers indicate that Red and Yellow potato stocks are up significantly from last year. If that is accurate, both Red and Yellow potato shipments from the Red River Valley should pick up significantly during the next 3 months.

Florida: At 271,000 cwt, Florida's February potato shipments exceeded the 2022 pace by 50,000 cwt, or 22.8%. That is the state's strongest February movement since 2019. The south and central Florida harvest began the first week of February. Shipments during the week ending February 25 were running 44.3% ahead of last year's pace. Movement should continue to pick up during the next several weeks. Florida's 2023 potato crop appears to be in good condition.

Michigan: February fresh potato shipments totaled 253,000 cwt. That is 23,000 cwt less than year-earlier movement, an 8.4% decline. For the season, through February 28, shipments are running 17.3% short of last year's pace. Table potato shipments are likely to be down during the remainder of the season.

Nebraska/NE Colorado: Combined February table potato shipments from the region totaled 209,000 cwt. That is 30,000 cwt more than the region shipped during February 2022, a 16.7% increase. February 2023 shipments from the area came mostly from northeastern Colorado. Season-to-date movement from the region is up 16.6% from last year. We understand that the region will continue shipping storage potatoes through all of July.

Texas: The state shipped 185,000 cwt of table potatoes during February. That is 55,000 cwt less than it shipped a year earlier, a 23.0% decline. Season-to-date table potato shipments have been running 11.9% behind the 2022 pace. Texas storage potato shipments are expected to continue into July, though at a slower pace. Planting will get underway in the Dalhart area tomorrow.

Kern County: February shipments from the County's winter crop totaled 118,000 cwt. That nearly matched year-earlier sales. Through February 28, Kern County's 2023-crop shipments have been running 6.5% behind the year-earlier pace. The transition from the Kern County winter crop to the Imperial Valley crop usually takes place in early April.

Other areas: Total fresh potato shipments from the "other areas" fell 39.6% short of year-earlier movement, to 166,000 cwt. Maine's reported February shipments totaled 54,000 cwt, a 66.6% decline. Shipments from the Klamath Basin totaled 89,000 cwt, up 15.3% from February 2022 movement. Central Minnesota's shipments increased by 48.6%, to 22,000 cwt. USDA did not report any shipments from New York during February. A year ago, shipments from the state totaled 19,000 cwt.

The outlook for fresh potato shipments, over the next six months, varies substantially by potato type. New-crop supplies will be picking up during the coming months, but the first 2023-crop Russets from traditional growing areas will not be available until late July. Some growers may try to produce Russet table potatoes in southern growing areas to fill the supply gap. Red and Yellow potato shipments should continue at a strong pace until storage supplies run out. A more-detailed outlook is in the text that follows.

Russet potatoes: Packers shipped 4.45 million cwt of Russet potatoes during February. That is 325,000 cwt less than they shipped during February 2022, a 6.8% decline. Reduced movement from Idaho (-206,000 cwt), Maine (-55,000 cwt), Texas (-46,000 cwt), Wisconsin (-42,000 cwt), and Michigan (-16,000 cwt) were the primary factors in the decline. Russet movement increased from Nebraska/northeastern Colorado (+20,000 cwt), the Columbia Basin (+15,000 cwt), and the Klamath Basin (+8,000 cwt). Processors have purchased a substantial volume of open-market Russet potatoes, which has reduced the supply available for the table potato market. The Russet shipping pace from Idaho and several other areas will likely remain below the 2022 pace through the rest of the storage season.

Red potatoes: At 702,000 cwt, February shipments of Red potatoes exceeded year-earlier movement by 69,000 cwt, or 10.8%. Nearly all of the shipping areas reported strong Red potato movement during the month. Shipments from the Red River Valley (+21,000 cwt), Wisconsin (+14,000 cwt), Florida (+13,000 cwt), the Columbia Basin (+12,000 cwt), Central Minnesota (+7,000 cwt), and Idaho (+5,000 cwt) increased. On the other hand, Red potato movement from Maine (-4,000 cwt) and Michigan (-2,000 cwt) dropped. Early shipments from Florida's Red potato crop are running 10.2% ahead of the February 2022 pace. The current shipping pace may not be sustainable during the rest of the storage season.

Yellow potatoes: February shipments totaled 663,000 cwt. That is 6,000 cwt more than year-earlier movement, a 1.0% increase. Florida (+27,000 cwt), Idaho (+19,000 cwt), Wisconsin (+13,000 cwt), and the Columbia Basin (+13,000 cwt) accounted for he increase. February Yellow potato shipments from the Red River Valley (-29,000 cwt), Maine (-14,000 cwt), the San Luis Valley (-7,000 cwt), and Michigan (-6,000 cwt) dropped. At 97,000 cwt, Florida's new-crop Yellow potato shipments exceeded year-earlier movement by 38.5%. Yellow production is up from last year in the storage states, but supplies have been cleaning up quickly.

Round White table potatoes: Reported February shipments of Round White table potatoes fell 44,000 cwt below 2022 movement, to 90,000 cwt. USDA has not reported any shipments from New York. Reduced movement from Maine, and Wisconsin also were factors in the decline. Round White potato shipments from Florida, the San Luis Valley, and Michigan increased.

JANUARY 31 FREEZER STOCKS UP 43.7 MILLION LBS

Freezer stocks increased by 43.7 million lbs, or 3.4%, during January. The January inventory build was 23.8 million lbs less than the five-year average buildup for the month, 67.5 million lbs. Last year, fryers increased stocks by 86.1 million lbs during January. This year's inventory build is impressive, given the raw-product supply constraints the frozen processing industry has been challenged with. It suggests that fryers have increased prices enough to ration the limited finished-product supplies.

Freezers held 1.263 billion lbs of French Fries and other Frozen potato products on January 31. That is 113.0 million lbs more than they held a year earlier, a 9.8% increase. It is 4.6% more than the five-year average inventory. January 31 frozen product stocks are the second-largest (behind 2019), since 2002.

FROZEN POTATOES IN COLD STORAGE

(Million Lbs)

	Jan 31 2022	Dec 31 2022	Jan 31 2023	---Change From--- 2022	Dec 31
French Fries	939.5	999.2	1033.7	10.0%	3.5%
Other	210.6	220.3	229.4	9.0%	4.2%
Total Frozen	**1,150.1**	**1,219.4**	**1,263.2**	**9.8%**	**3.6%**
Days' Inventory	31.0	31.9	33.0	6.5%	3.4%

Source: February 2023 *Cold Storage* report

January 31 freezer stocks equate to a 33.0 day inventory at the current usage rate. That is up from a 31.0 day supply at the same date in 2022, a 6.5% increase. It is the largest January 31 inventory, relative to use, since 2020. The January 31 stocks provide the industry with a 115 million lb cushion going into February 2023.

Industry data indicate that buyers purchased 6.9% less US frozen product in December and January than they did during the same period in 2021/22. As we reported last week, processors used 29.7 million cwt of potatoes for purposes other than dehydration during December and January. That is 1.2 million cwt less than they used a year earlier, a 3.8% decline. Frozen product inventories increased by 82.4 million lbs between November 30 and January 31. A year ago, fryers were able to add 36.9 million lbs of frozen product to freezer inventories during that period. This year's inventory build is equivalent to pulling 1.65 million cwt of potatoes from the processing stream. As a result, we estimate that raw-product equivalent sales fell 2.07 million cwt below the year-earlier pace, a 6.9% decline. The usage data reflect French Fry supply limitations. French Fry imports have helped cover the supply gap created by the downturn in domestic French Fry production. Trade data for January are not yet available, but December imports totaled 202.5 million lbs. That is down 1.8% from year-earlier imports; however, it is the second-largest December import volume on record. December French Fry imports from the EU are up 52.3%, relative to December 2022.

Fryers may need to pull down finished-product inventories ahead of the transition to the 2023 crop. As we reported last week, US February 1 potato stocks were down 3.1% from a year ago. The combination of strong demand and limited raw-product supplies make a modest buildup challenging. During the past five years, the average freezer stocks drawdown between January 31 and June 30 has been 40.6 million lbs. An average drawdown would put June 30 stocks at a 32.0 day inventory. This year's drawdown is likely to be substantially larger than the avegage. The maximum drawdown for that period is 116.1 million lbs, which occurred in 2020. The current buildup is necessary since fry plants could be down for 3-4 weeks during the crop transition.

Given the current raw product supply conditions, the US will not be in a position to expand finished product supplies. On the other hand, Canadian fryers should be able to expand production. Canada had the largest February 1 inventory of processing potatoes on record. Some of those potatoes will be shipped to fry plants in the Pacific Northwest. European fryers will be challenged to expand offshore exports, due to their own raw-product supply limitations. Domestic customers will have to compete with global markets for the available frozen product supplies.

FROZEN PROCESSING ANALYSIS: DECEMBER-JANUARY

Season	Processed (000 Cwt)	-----Inventory Adj----- (Mln lbs)	(000 Cwt)	Total * (000 Cwt)	Change
2002	22,465	-41.3	826	23,291	- NA -
2003	21,990	-65.6	1311	23,301	0.0%
2004	22,930	-50.5	1011	23,941	2.7%
2005	23,145	-46.2	925	24,070	0.5%
2006	24,640	-10.8	216	24,856	3.3%
2007	24,440	10.7	-213	24,227	-2.5%
2008	22,520	-41.1	821	23,341	-3.7%
2009	23,575	-16.8	336	23,911	2.4%
2010	23,875	-32.5	649	24,524	2.6%
2011	25,520	13.2	-265	25,255	3.0%
2012	25,110	30.9	-618	24,492	-3.0%
2013	26,440	-46.0	919	27,359	11.7%
2014	25,190	-13.8	276	25,466	-6.9%
2015	25,970	-33.9	677	26,647	4.6%
2016	25,385	15.2	-304	25,081	-5.9%
2017	29,155	-15.8	317	29,472	17.5%
2018	30,323	66.8	-1336	28,987	-1.6%
2019	30,225	20.3	-406	29,819	2.9%
2020	28,454	-14.1	282	28,736	-3.6%
2021	30,816	36.9	-739	30,077	4.7%
2022	29,652	82.4	-1647	28,005	-6.9%

* Processing use plus the raw-product equivalent of the December-January inventory change

CURRENT CROP AND MARKET DEVELOPMENTS

Columbia Basin growers started planting the 2023 potato crop this week. The weather has been cool and windy. Early varieties will be in strong demand, given this year's short supply of fry-quality potatoes in the Pacific Northwest. Winter storms may make it difficult to transport seed from Alberta, Montana, and Idaho to the Columbia Basin next week.

North American processing contract negotiations are wrapping up. Growers in North Dakota have settled contracts with Simplot. Wisconsin growers are expected to vote today. Idaho and Alberta appear to be close. Negotiations are underway in Maine and the Eastern Provinces. Prices are up approximately 18%-22%.

Domino's Pizza has launched a new menu item—loaded tots. The global pizza chain has over 5,600 stores in the US.

February US chip potato shipments exceeded 2022 movement by 1.2%. At 4.66 million cwt, that is 54,000 cwt more than the industry shipped a year earlier. Strong shipments from Wisconsin (+264,000 cwt) and the Southwest region (+184,000 cwt) were the largest factors in the increase. Shipments from North Dakota (+59,000 cwt) and the Midwest region (+28,000 cwt) also increased. In contrast, reported February chip potato movement fell short of the 2022 pace in several areas. Michigan (-217,000 cwt), the Rocky Mountain region (-139,000 cwt), New York (-82,000 cwt), Maine (-27,000 cwt), and Pennsylvania (-19,000 cwt) each posted reduced movement during February. Chip potato shipments from the West Coast and Midcentral regions nearly matched year-earlier movement. Season-to-date chip potato shipments (August-February) totaled 31.03 million cwt. That falls 739,000 cwt, or 2.3% short of year-earlier movement. Chip potato markets remain quiet. Buyers appear to have plenty of storage potatoes to carry them through the season.

SHIPPING POINT PRICES: MARCH 1

	Mar 1	Change From Feb 22	Change From Last Year
Idaho Burbank			
Baled 5/10# non-A	$24.00		$7.50
40 Count	$61.00	-$1.00	$35.50
50 Count	$61.00	-$1.00	$35.50
60 Count	$52.00		$22.00
70 Count	$52.00		$22.00
80 Count	$48.00		$18.00
90 Count	$40.00		$11.00
100 Count	$36.00		$10.00
#2 - 6 oz Minimum	$31.00		$15.00
#2 - 10 oz Minimum	$50.00		$27.00
San Luis Valley			
Russet 5/10# Size A	$26.50	$1.00	$7.50
Russet 40 Count	$57.00	$1.00	$25.00
Russet 50 Count	$57.00	$1.00	$25.00
Russet 60 Count	$57.00	$1.00	$25.00
Russet 70 Count	$52.00	$1.00	$20.00
Russet 80 Count	$45.00		$13.50
Russet 90 Count	$38.00		$13.00
Russet 100 Count	$38.00		$13.00
Columbia Basin			
Russet 5/10# Size A	$22.00		$7.00
Russet 40 Count	$60.00		$24.00
Russet 50 Count	$60.00		$24.00
Russet 60 Count	$56.00		$20.00
Russet 70 Count	$56.00		$20.00
Russet 80 Count	$49.00		$17.00
Russet 90 Count	$40.00	$2.00	$12.00
Russet 100 Count	$36.00		$11.00
Central Wisconsin			
Russet 5/10# Size A	$30.00	$1.00	$10.00
Russet 40 Count	$60.00		$25.00
Russet 50 Count	$60.00		$25.00
Russet 60 Count	$58.00		$23.00
Russet 70 Count	$56.00		$21.00
Russet 80 Count	$51.00		$19.50
Russet 90 Count	$41.00		$15.00
Russet 100 Count	$37.00		$12.00
Red 10/5# Size A	$33.00		- NA -
Red 50# Size A	$43.00		- NA -
Red 50# Size B	$31.00		- NA -
Red River Valley			
Red 10/5# Size A	$30.00	-$0.50	- NA -
Red 50# Size A	$30.00	-$0.50	-$1.00
Red 50# Size B	$41.50	$0.50	$1.00
Red 50# Creamers	$60.00		-$2.00
Red 2000# Size A	$22.00	-$0.50	-$3.00
Yellow 50# Creamers	$60.00		-$2.00
Yellow 2000# Size A	$27.50		$2.00
Michigan			
Russet 5/10# Size A	$33.00		$10.00
Florida			
Red 50# Size A	$36.95	-$7.25	-$6.25
Red 50# Size B	$52.20		$5.00
Red 50# Creamers	$81.25		-$4.95
R White 50# Size A	$79.20	-$0.70	$9.00
R White 50# Size B	$54.90		$6.70
R White 50# Creamers	$96.95		$5.75
Yellow 50# Size A	$56.20		$2.00
Yellow 50# Size B	$39.20	$3.00	-$6.00
Yellow 50# Creamers	$91.25		-$5.65

Source: Federal- State Market News. Midpoint of "mostly" range.
All prices are $/Cwt basis. NA = Not Available. Blanks signify no change.

RUSSET TABLE POTATO PRICE INDICES: MARCH 1

	Mar 1	Change From Feb 22	Change From Last Year
Fresh Weighted Average			
Idaho Burbank	$35.71	-$0.07	$14.00
Idaho Norkotah	$35.30		$14.06
San Luis Valley	$33.73	$0.80	$11.20
Columbia Basin	$37.58	$0.22	$13.02
Wisconsin	$35.80	$0.67	$12.54
Grower Returns Index			
Idaho Burbank	$18.71	-$0.04	$8.63
Idaho Norkotah	$21.46		$10.33
San Luis Valley	$22.14	$0.70	$9.11
Columbia Basin	$20.28	$0.14	$8.05
Wisconsin	$22.51	$0.54	$9.57

Derived from Market News data - $/Cwt Basis; NA = Not Available; Blanks signify no change.
Note: Prices are based on spot market sales and exclude previously contracted potatoes

North Carolina growers have started planting their 2023 potato crop. Approximately 15% of the crop is in the ground. Local observers indicate that potato acreage will be about the same as it was last year. North Carolina growers usually begin digging in mid-June and finish shipping by the end of July.

Recent snowstorms have improved Idaho's irrigation water outlook. The snow-water-equivalent for the Snake River Basin above American Falls is now at 114% of the median. Year-to-date precipitation is at 107% of the median. The Upper Snake River reservoir system is the lowest it has been, for this time of year, since 2004. It was close to the same level in 2005. The Upper Snake River system is currently at 46% capacity. That is 70% of average, and 87,500 acre feet lower than it was at this time last year. The American Falls reservoir is 63% full. Palisades reservoir and Jackson Lake are at 30% and 22% capacity, respectively. In 2009, the state implemented the Eastern Snake Plain Aquifer management plan. The plan's primary objectives were to increase recharge and to reduce withdrawals from the aquifer. Those objectives have not been met. Surface water irrigators and groundwater pumpers are now working to revise the aquifer management plan, which could result in substantial water use reductions for some growers. Though water availability has not been a limiting factor in the past, some industry experts believe the current water issues might hold back an expansion of Idaho's potato acreage in 2023.

FRESH SHIPMENTS: WEEK ENDING FEBRUARY 25

(Thousand Cwt)

	2020	2021	2022	2023	Change
Idaho	618	766	544	566	4.2%
San Luis Valley	246	294	340	300	-11.9%
Wisconsin	95	105	118	120	1.8%
Florida	56	72	83	102	22.8%
Columbia Basin	160	145	92	99	8.3%
Red River Valley	72	62	72	72	-0.5%
Michigan	59	60	60	47	-21.1%
Nebraska/NE CO	47	65	43	45	5.0%
Other	166	177	134	101	-24.9%
US Total	**1,517**	**1,745**	**1,486**	**1,452**	**-2.3%**
By Type					
Russet	1,182	1,345	1,132	1,069	-5.5%
Red	143	188	154	176	14.2%
Yellow	125	160	147	167	13.2%
Round White	40	24	39	34	-13.6%
Other *	28	28	13	6	-52.7%

Source: Preliminary Federal- State Market News Data * Includes Long White potatoes