



AHDB Consumer Insight Snapshot

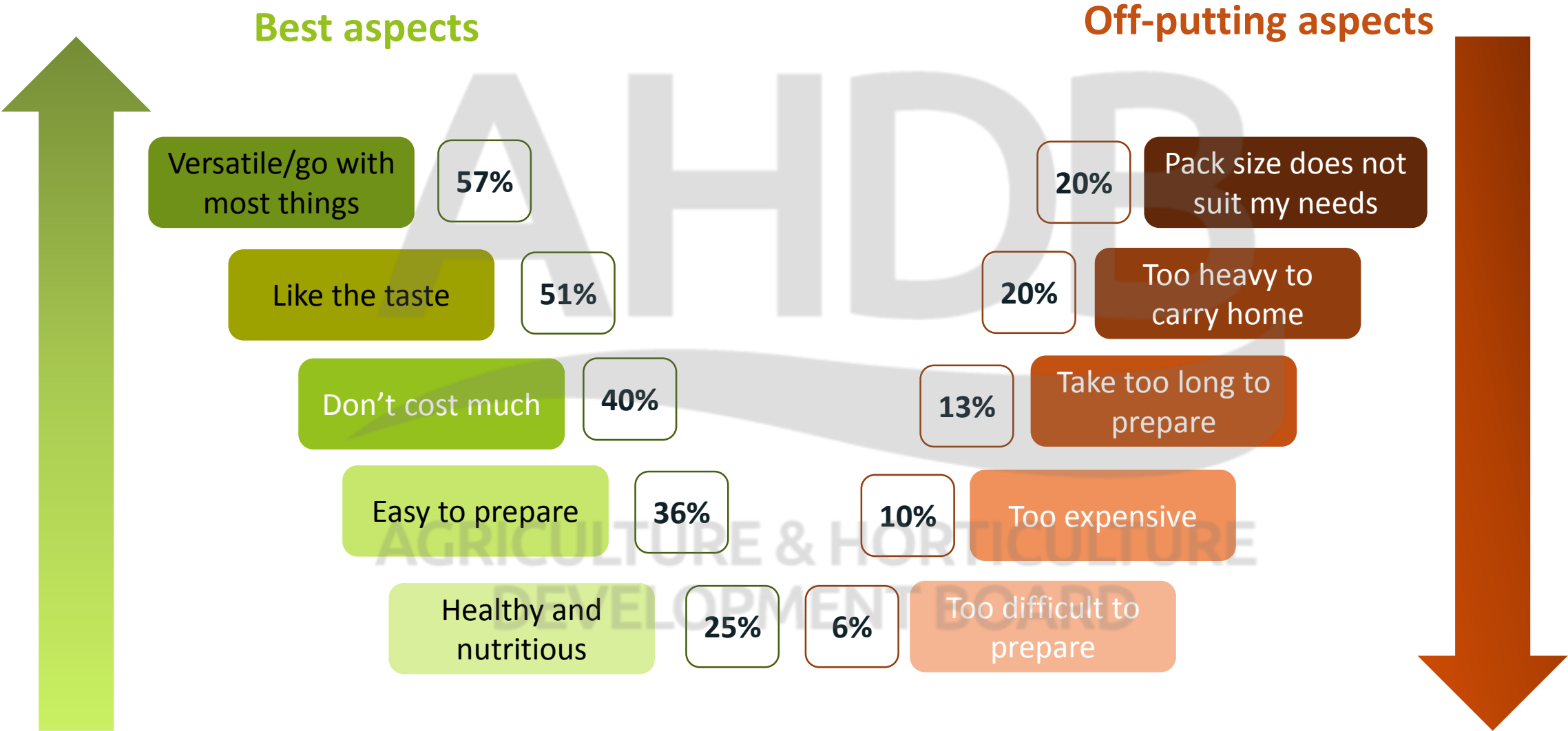
A view of potatoes

In the following slides, you will find an overview of consumer perception of potatoes and key figures for the potato retail market.

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Consumer perception of potatoes



Source: AHDB/YouGov Consumer Tracker, wave 11, Feb 2018 Base: All respondents in potato section (1207)
YGq21: Which THREE, if any, of the following would you say are the best aspects of potatoes? (Please select up to three options); YGq20: Which THREE, if any, of the following put you off buying more fresh potatoes? (Please select up to three options)

Potato perception and usage

Key findings from AHDB/YouGov's consumer tracker:

- 90% of people agree 'there are many ways to serve potatoes', highlighting that most perceive potatoes to be a versatile ingredient
- 41% of consumers believe that salad/new potatoes are worth paying a bit more for, compared with just 11% who feel the same about white potatoes
- 77% of consumers surveyed said that they eat fresh potatoes at least once a week



Fresh potatoes eaten at home

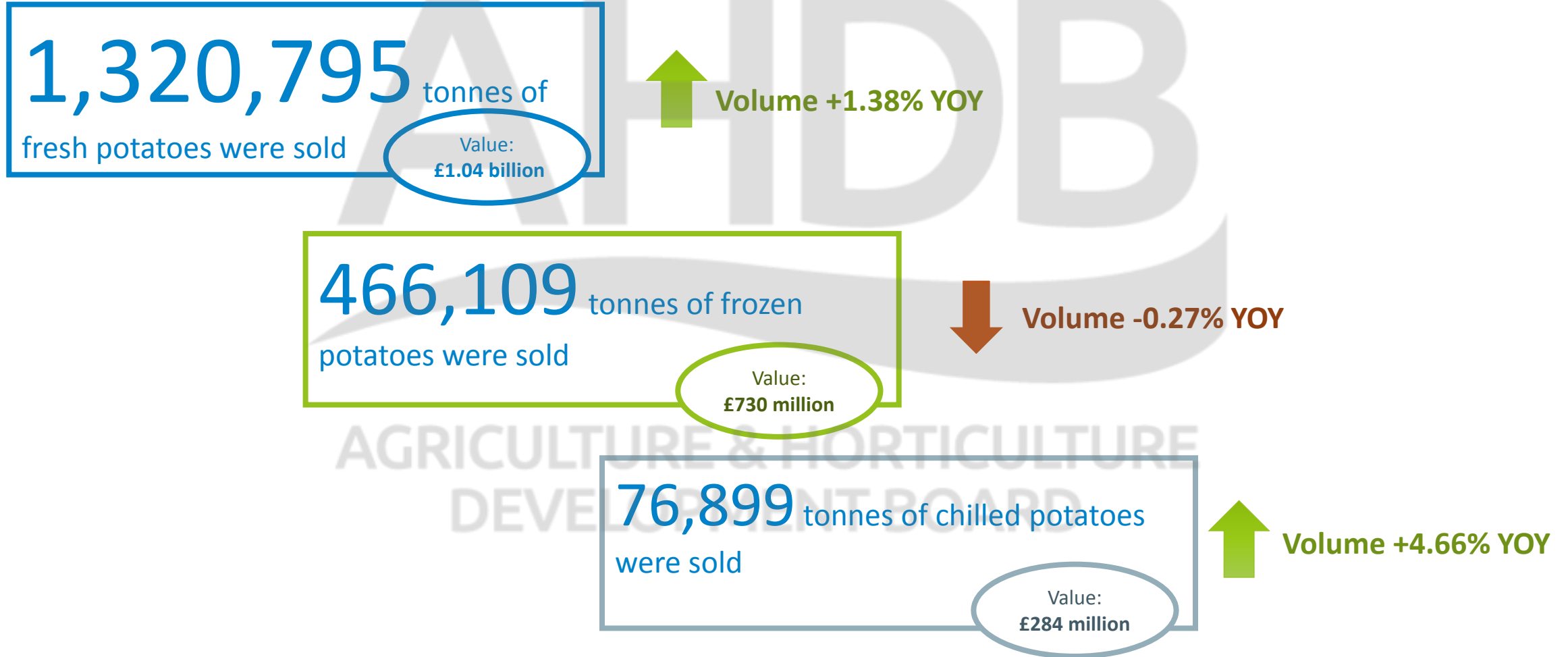
- The number of meal occasions made and/or eaten at home that included potatoes* was 5.44 billion in the year ending 25 Feb 2018. According to Kantar Worldpanel Usage data, this figure has declined by 6.7% since 2014

Sources: AHDB/YouGov consumer tracker Base: All respondents in potato section (1207) PQ8a, PQ10: Here are some statements people have made about potatoes. To what extent do you agree or disagree with them? YGq30: How often do you eat fresh potatoes? By fresh potatoes we mean fresh potatoes which are sold as uncooked/unprepared; Kantar Worldpanel Usage, 52 w/e 25 Feb 2018

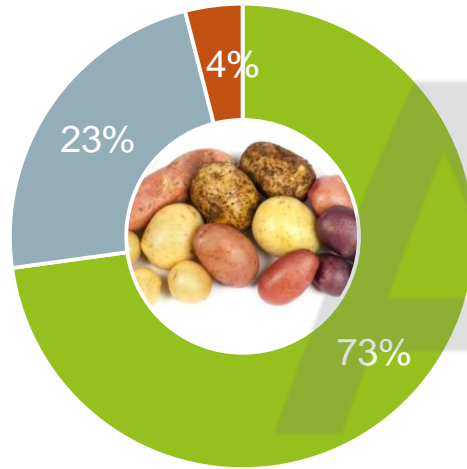
* Kantar Worldpanel Usage definition for dishes with potatoes includes: American, Baking Potatoes, New Potatoes, Coated Oven/Fry Products, Old Potatoes, Diced Potato, English, French, Fry Chips, Grated Potatoes, Indian, Instant Mashed Potato, Italian, Jersey Potatoes, Microchips, New Potatoes, Old Potatoes, Other Snacks, Oven Chips, Potato Products, Potato Salad, Potato Skins, Potato Wedges, Prepared Vegetables, Spanish, Sweet Potatoes, Three Way Cook Chips, Vegetable Accompaniments

Potato retail performance

According to Kantar Worldpanel data, in the year ending 22 April 2018...



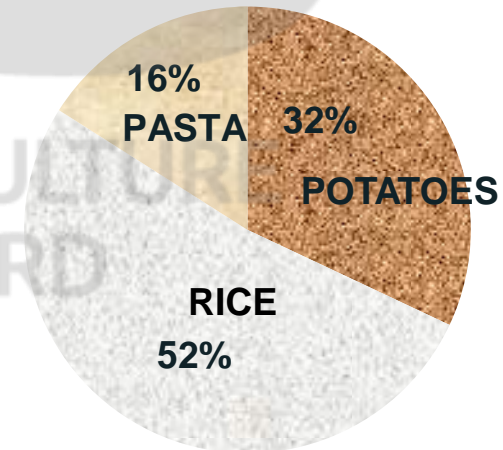
How healthy do consumers think potatoes are?



- **Healthy**
- **Neither**
- **Unhealthy**

When asked to think about potatoes specifically, 73% consumers agree that potatoes are healthy...

...however, when compared with other carbohydrates such as pasta and rice, they are viewed as the second healthiest option



Summary

Strengths

- Fresh potatoes have a strong association with versatility and health, which puts them in a good position for meeting the consumer desire for varied meals and eating healthily

Challenges

- Consumers have increasing choice at mealtimes and this includes the popularity of dish-based meals, which do not always feature potatoes as the main carbohydrate
- Average preparation time for an evening meal is now around half an hour, which could be a challenge for fresh potatoes particularly

Opportunities

- Chilled, part-prepared and frozen products can fulfil the consumer desire for quick and easy meals
- Chilled potatoes represent a much smaller segment of the market in volume terms, but they are high-value products and have experienced continued growth in recent times



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