



UNITED STATES

Potato

B O A R D

Maximizing Return on Grower Investment

Expanding

Consumer-Oriented Exports: Innovative Marketing in
Competitive Markets

Susan Weller, UPSB International
2014 Agricultural Outlook Forum
Thursday, February 20, 2014



USPBB Overview- LRP & Potato Exports





USPB Mission Statement

Maximizing Return on Grower Investment

The mission of the United States Potato Board is to **increase demand for potatoes and potato products** through an integrated promotion program, thereby providing US producers with expanding markets for their production.



USPB Long Range Plan- 5 year

Maximizing Return on Grower Investment

- Growth will come from innovation, consumer-based offerings developed from **research and new markets**; without innovation and new markets there will be few growth opportunities.



USPB Strategies

Maximizing Return on Grower Investment

- Increase usage of US potatoes and potato products
- Expand markets
- **Improve the competitive position**
- Present a favorable image of potatoes to the public

US Potato Production

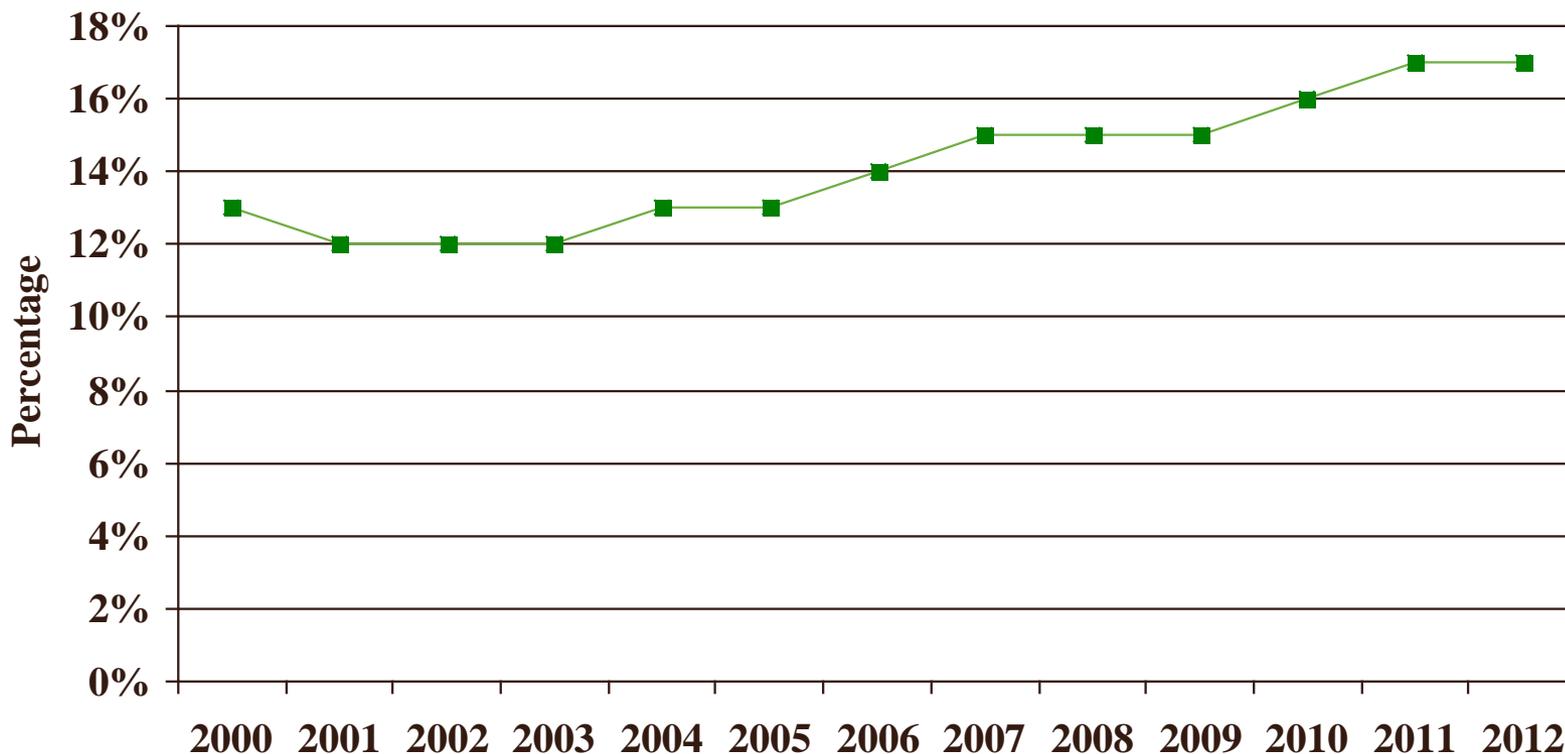
by Category

1,000 CWT	2010	2012	% Change
On Farm, Livestock & Cnd	32,162	39,764	24%
Seed	20,621	23,706	15%
Chips	54,508	56,349	3%
Dehy, Starch & Flour	40,498	58,590	45%
Frozen	149,077	165,822	11%
Table-stock	107,407	118,535	10%
Total	404,273	462,766	14%



US Potato Exports as Percentage of Production

Total Exports



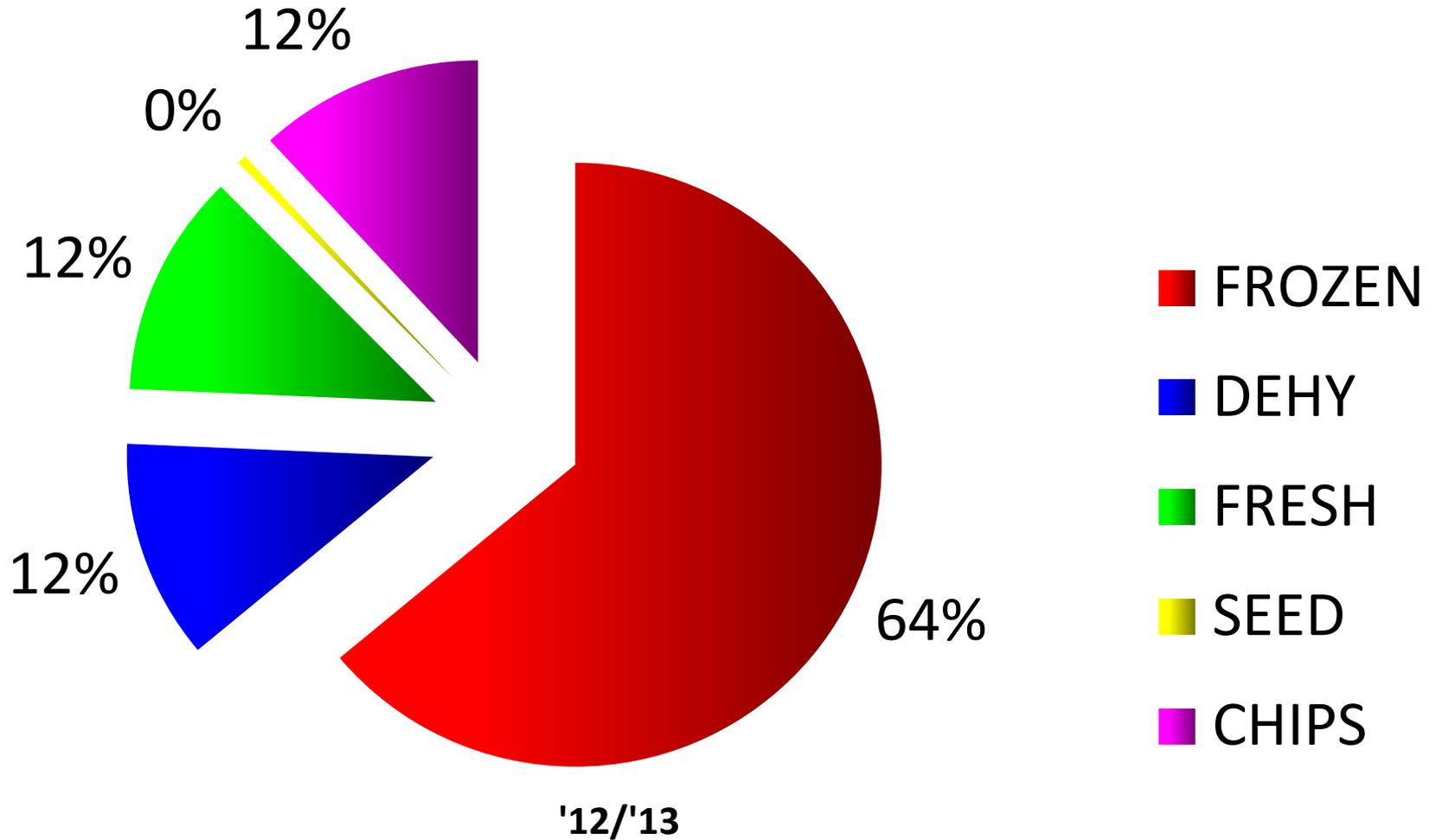
US Potato Exports

in 1,000 CWT

Product	2003	2010	2012
Seed	501	423	397
Chips	6,557	4,274	4,507
Fresh	5,488	8,090	9,456
Dehy	10,074	14,351	17,114
Frozen	19,987	27,651	35,077



US Potato Exports Value (by Percentage)



US Frozen Potato Products



Frozen Potato Exports

Protect and expand

US market share



The Shoestring Fry



US Shoestring Fry Local & Global Competition

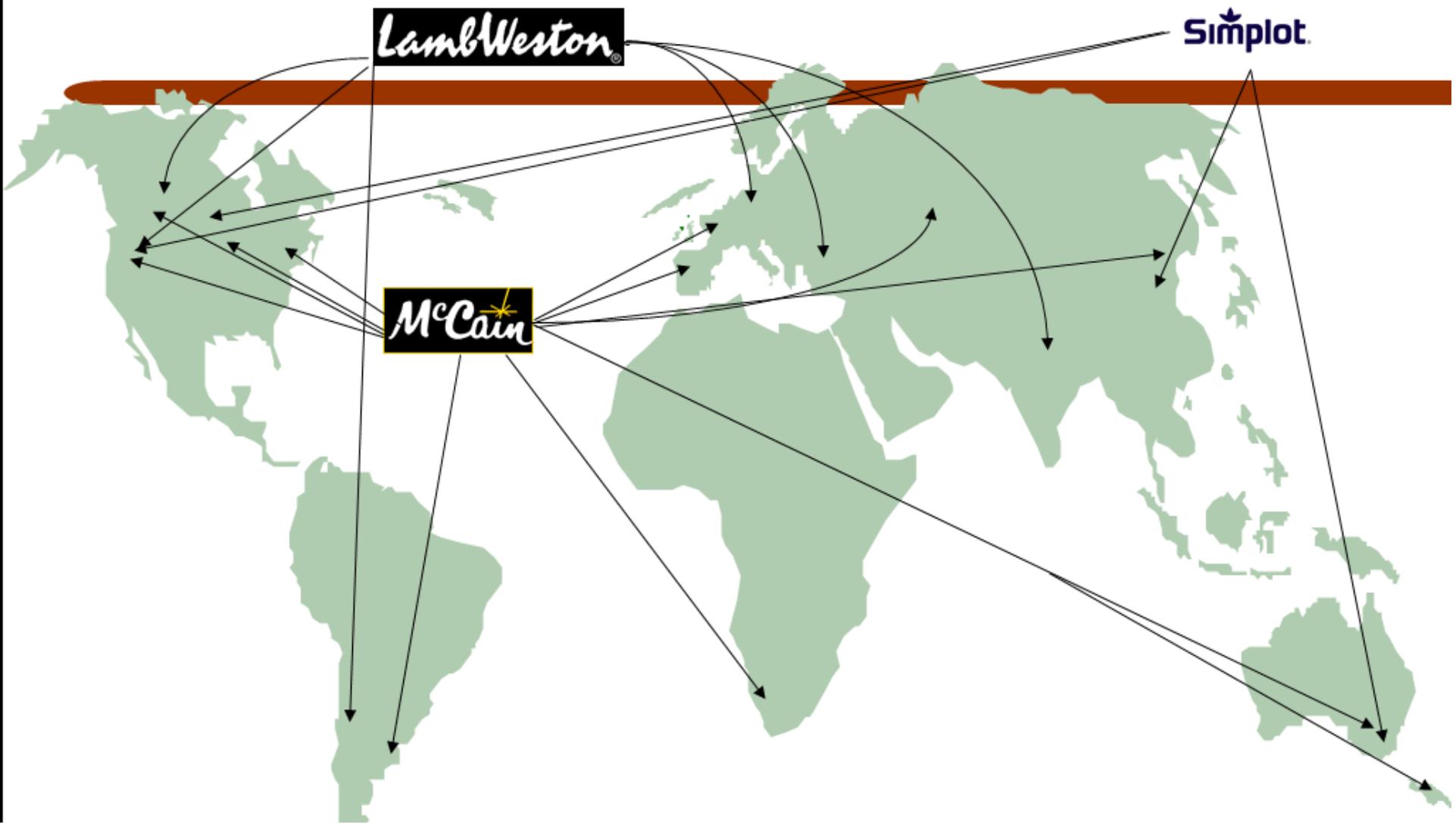


Shoestring Fry Competition- Very Global





Major “North American” Potato Processors



Why Buy US Fries? aka WBUS

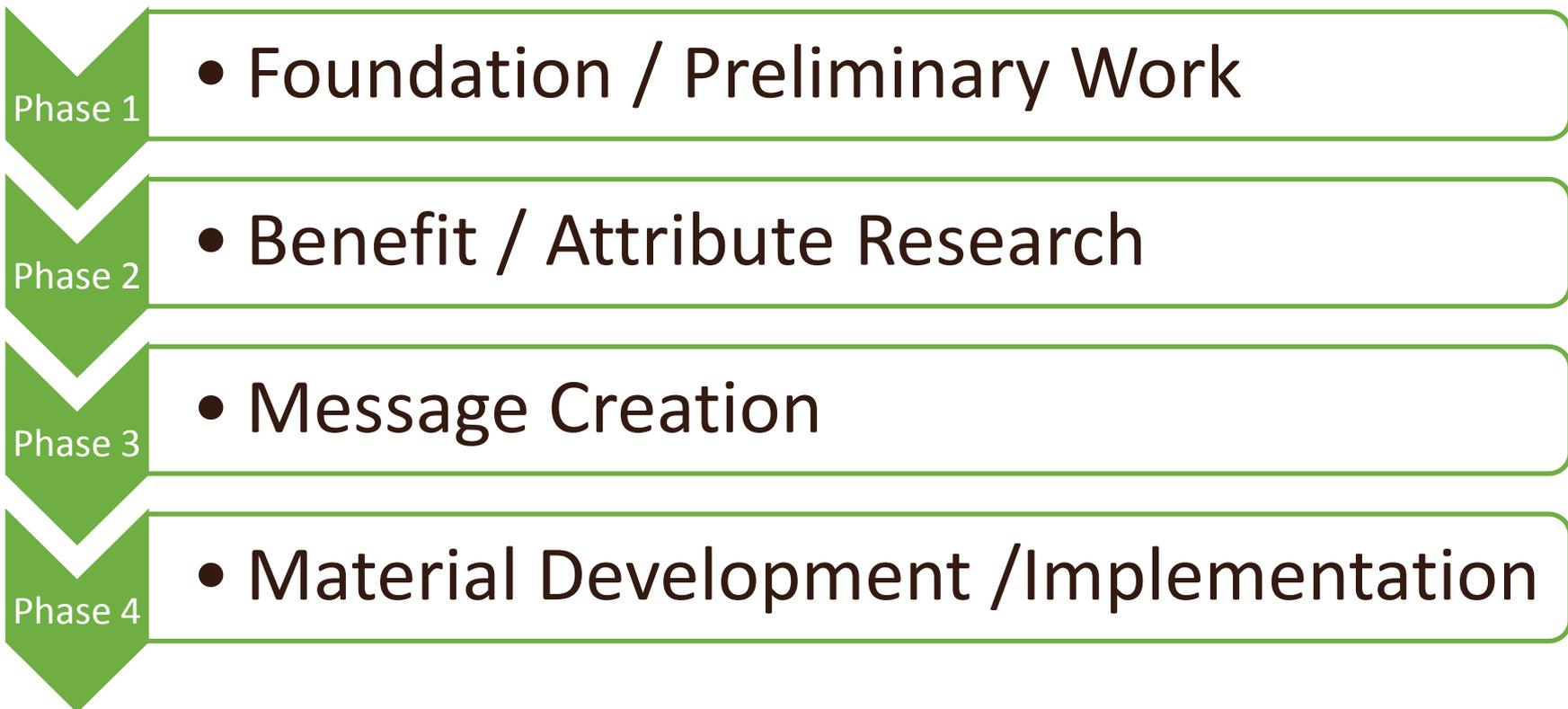
Project initiated





Why Buy US Fries? aka WBUS

Project initiated in phases





2 types of research conducted

- **Foreign market and buyer understanding** and research, and message development in various international markets

- **Benefit/ Attribute laboratory work** to compare the highest fry products physically at Oregon State University's FIC

OSU Laboratory research

Food Innovation Center, OSU



The Food Innovation Center (FIC) of Oregon State University is a state-of-the-art independent food laboratory located in Portland, Oregon.

It is known for its extensive experience in food product analysis, new product development, agricultural research and knowledge of global markets.



GROW YOUR PROFITS With US Fries

6

OSU Laboratory research

FIC Research



- Tested frozen shoestring fries produced by multiple processors in the US, Canada and Europe
- All samples purchased in the international markets in Asia and Latin America
- Purchased highest quality product available in the markets
- Conducted extensive evaluations of length, moisture, oil content, quality and yield.



GROW YOUR PROFITS With US Fries



Main Research Outcomes

Why Buy US Fries?



- **Profitability**
- **Superior Quality Fries**
- **Consistent Supply Chain**
- **US Potato Board Support**



GROW YOUR PROFITS With US Fries

Main Research Outcomes- Profitability

Profitability



The FIC research documented that US Extra Long Fancy (XLF) fries provided a higher percentage of long fries than the highest grade fries from competitors.



It's the Potato!



GROW YOUR PROFITS With US Fries

8

More: Volume

Volume of 1 kg of Frozen Fries



US



Canadian



European



GROW YOUR PROFITS With US Fries

Main Research Outcomes- Profitability

US XLF Fries Give You:



Six more servings than Canada:



Thirteen more servings than Europe:



GROW YOUR PROFITS With US Fries

More: Profits for You



Calculating Your Profits	Your Profit Example
Number of Additional Servings X	13 More Servings US vs. EU X
Average Price Per Serving	\$1.25/Serving = \$16.25
-	-
Cost Differential Between US Fries and Competitor Fries	US XLF \$20 - European \$18 = \$2
=	=
Your Additional Profit	\$14.25

GROW YOUR PROFITS With US Fries



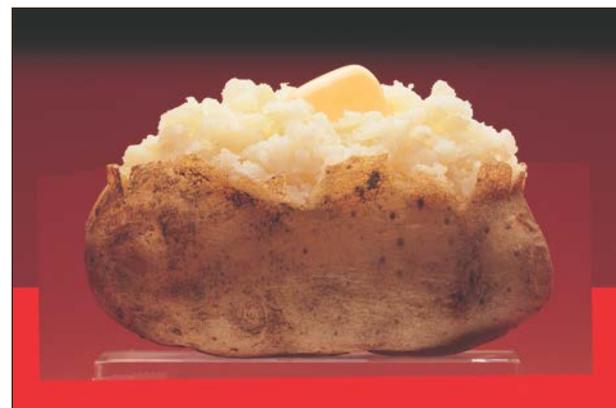
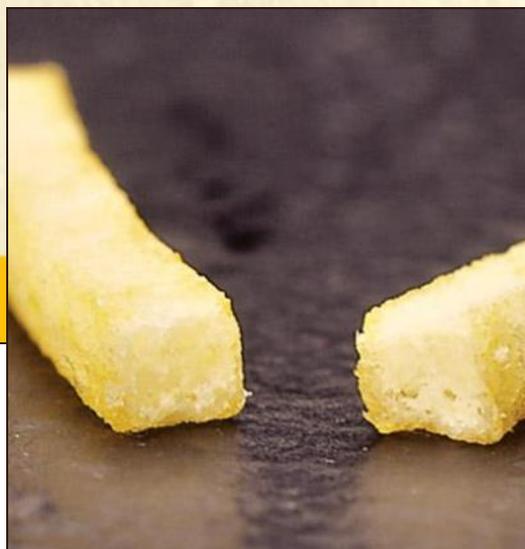
Main Research Outcomes- Quality

Superior Quality Fries



US Fries have the taste and characteristics your customers want

- **Appealing Color**
- **Appetizing Texture**
- **Delicious Taste**



GROW YOUR PROFITS With US Fries



Main Research Outcomes- Consistency

Consistent Supply Chain



- Dedicated US Growers
- State-of-the-Art Processing
- USDA Grade Standards



USDA Grade Standards



USDA Frozen Fry Length Specs

US Extra Long Fancy	30% are longer than 7.5cm (3") 80% are longer than 5.0cm (2")
US Long Fancy	15% are longer than 7.5cm (3") 70% are longer than 5.0cm (2")
US Medium	50% are longer than 5.0cm (2")
US Short	50% are shorter than 5.0cm (2")
Other Countries	No Standards



GROW YOUR PROFITS With US Fries



Main Research Outcomes-

USPB Support Programs

US Potato Board Support



- On-Site Training
- Tailored Seminars
- Educational Materials
- Promotional Support
- Representation



GROW YOUR PROFITS With US Fries



Feedback and Material Creation



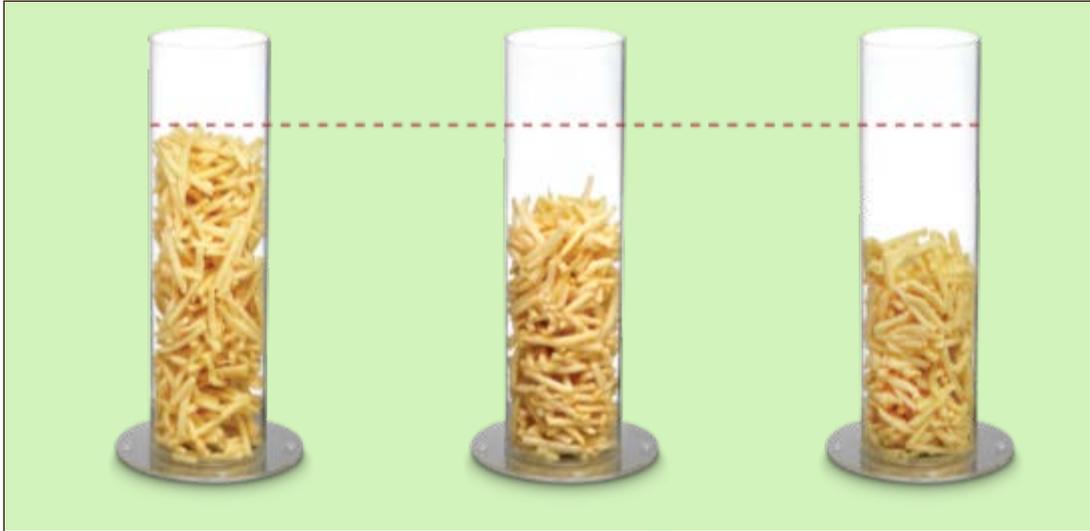


US Material Creation- “Grow Your Profits” brochure & presentation





US Material Creation- Plastic Cylinders



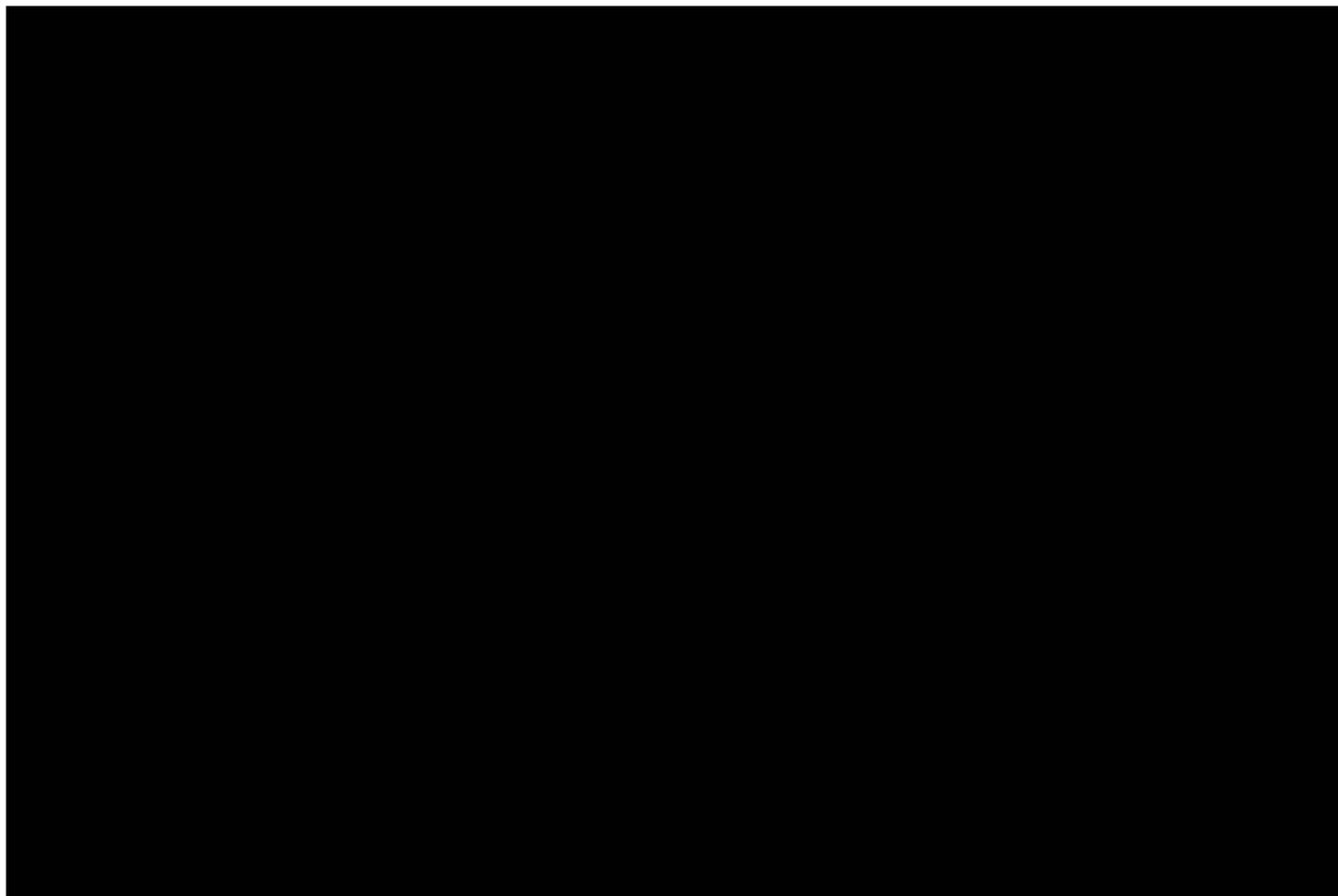


US Material Creation- demo clip

The video player displays a promotional poster for 'Why Buy US Fries'. The poster is split into two vertical panels. The left panel has a light beige background and features a central illustration of a potato plant with green leaves and several potatoes in a woven basket. Below the illustration, the text reads 'UNITED STATES' in a serif font, followed by 'Potato' in a large, elegant cursive script. At the bottom of the left panel, there is a red rectangular box containing the Spanish subtitle 'Necesito alguien que me ayude porque es un poco complicado'. The right panel has a solid dark red background with the text 'Why Buy US Fries' in a large, bold, yellow serif font, and 'Demonstration' in a smaller, yellow serif font below it. The video player interface at the bottom shows a progress bar at 00:13 / 05:02, a play button, and other standard controls.



Profitability Demo





WBUS activity
implementation in
the international
markets





Training of the reps- Asia and Latin America





International Material Adaptations- Vietnam

TẶNG
LỢI NHUẬN
Với Khoai Tây Đông Lạnh Hoa Kỳ

Bao gồm các kết quả nghiên cứu từ Trung Tâm Cải Tiến Thực Phẩm của Đại học Bang Oregon



International Material Adaptations- Vietnam





International Material Adaptations- Thailand



ทำไมลูกค้าของคุณต้องซื้อมันฝรั่งทอดจากสหรัฐอเมริกา?
จากผลการวิจัย พบว่า

- เพราะมันฝรั่งทอดจากสหรัฐอเมริกา สามารถเพิ่มมูลค่าได้มากกว่าในทุกๆ กล่องบรรจุ**
 - มันฝรั่งทอดจากสหรัฐอเมริกา - มันฝรั่งแช่บ๊วย
 - มันฝรั่งทอดแบบยาวกว่า - ปริมาณสีฟฟามากกว่า
 - ปริมาณสีฟฟามากกว่า - ราคาไม่แพง
- เพราะมันฝรั่งทอดจากสหรัฐอเมริกามีคุณภาพเยี่ยม ไร้สารเคมีและกลิ่นคาว-กึ่งสุกคึ่งการ**
 - มีสีและเนื้อของ สีเหลืองทองมันฝรั่งแช่บ๊วยที่หวานหอม
 - เนื้อมันฝรั่งแช่บ๊วยหวานมันไม่แข็งเกินไป
 - มีเนื้อนุ่มกว่าแบบเกาะ - คือปริมาณเนื้อมันฝรั่งแช่บ๊วยไม่ต่ำกว่าประมาณ 13%
 - มีรสชาติอร่อย กรอบนอกนุ่มใน
- เพราะสหรัฐอเมริกา มีความสามารถในการผลิต และจัดส่งมันฝรั่งทอดคุณภาพสูงตลอดทั้งปี**
 - ความมั่นคงของอุตสาหกรรมมันฝรั่งแช่บ๊วยในอเมริกาเหนือ
 - ฤดูปลูกและอากาศที่เย็นกว่า
 - กระบวนการผลิตและบรรจุที่ให้ความสำคัญกับเนื้อของสหรัฐอเมริกา
 - ระบบการไหลเวียนของสินค้าที่รวดเร็วและต่อเนื่องระหว่างสหราชอาณาจักรและสหรัฐอเมริกา (USDA)
- เพราะผู้ใช้มันฝรั่งทอดจากสหรัฐอเมริกา จะได้รับการสนับสนุนจากคณะกรรมการมันฝรั่งสหรัฐอเมริกา**
 - การตัดสินใจและมาตรฐานของสินค้า
 - การสนับสนุนด้านเทคนิคให้กับผู้บริโภคในอเมริกาเหนือ
 - ส่งเสริมการขาย เช่น โปสเตอร์ สำหรับส่งเสริมการขาย
 - ความร่วมมือกับหน่วยงานมันฝรั่งแช่บ๊วยในประเทศของตน

งานวิจัยของสถาบันวิจัยโภชนาการ มหาวิทยาลัยมหิดล
Food Research Center, King's College London
ผลิตภัณฑ์จากสหรัฐอเมริกาที่จำหน่ายในประเทศไทย, See USA! Professionals do the real thing.

มันฝรั่งทอดจากสหรัฐอเมริกา ให้คุณได้มากกว่า!

มากกว่าถึง "ปริมาณ, ปริมาณสีฟฟ, ผลกำไร"

เปรียบเทียบปริมาณสีฟฟต่อกล่องบรรจุ

ประเภท	ปริมาณสีฟฟต่อกล่องบรรจุ (กรัม)
ยุโรป	72
แคนาดา	79
สหรัฐอเมริกา	85

มากกว่าถึง 6 กล่องมันฝรั่งแช่บ๊วยจากแคนาดา

มากกว่าถึง 13 กล่องมันฝรั่งแช่บ๊วยจากยุโรป

มากกว่าด้วย ปริมาณสีฟฟต่อกล่องบรรจุ*

* ข้อมูลโดย: © King's College London
** ปริมาณสีฟฟต่อกล่องบรรจุโดยเฉลี่ย

พบการนำเข้ามันฝรั่งแช่บ๊วย - มันฝรั่งแช่บ๊วย 2 ส่วนจากสหรัฐอเมริกา สหราชอาณาจักร และออสเตรเลีย
ที่เลขทะเบียน 10110 ประเทศไทย
โทร: 061-733-1000
โทร: 02-381-1437
www.potatoesusa-thailand.com

International Material Adaptations- Korea



최고 수준의 가공기술

미국의 프라이 생산자들은 연간 440만 톤에 달하는 냉동감자 제품들을 생산하고 있습니다. 미국산 프라이는 미국정부의 식품안전 기준에 부합하는 품질로 생산됩니다.

USDA (미농무성) 등급 시스템



미국은 프라이 제품의 품질과 길이에 대한 정부차원의 등급시스템을 운영하고 있는 유일한 국가입니다. 미농무성 프라이 등급 시스템을 보실 수 있는 QR코드 또는 웹사이트를 참조하십시오.

www.potatoesusa.com/products.php?sec=Frozen%20Potatoes

USDA (미농무성) 냉동 프라이 길이 등급	
US Extra Long Fancy	30%가 7.5cm 보다 길다 80%가 5.0cm 보다 길다
US Long Fancy	15%가 7.5cm 보다 길다 70%가 5.0cm 보다 길다
US Medium	50%가 5.0cm 보다 길다
US Short	50%가 5.0cm 보다 짧다
Other Countries	기준 없음



United States Department of Agriculture,
Agricultural Marketing Service.
(미농무성, 농업 마케팅 서비스)

미국감자협회 (United States Potato Board)



UNITED STATES
Potato
BOARD

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www.healthypotato.co.kr
www.potatoesusa-korea.com

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미국산 프라이(Fry)로
귀하의 수익을
증대시키십시오

GROW
YOUR PROFITS
With US Fries



www.healthypotato.co.kr
www.potatoesusa-korea.com





International Material Adaptations- Japan



Japan version video



Why Buy US Fries?

**米国産フライドポテト
を選ぶ理由**

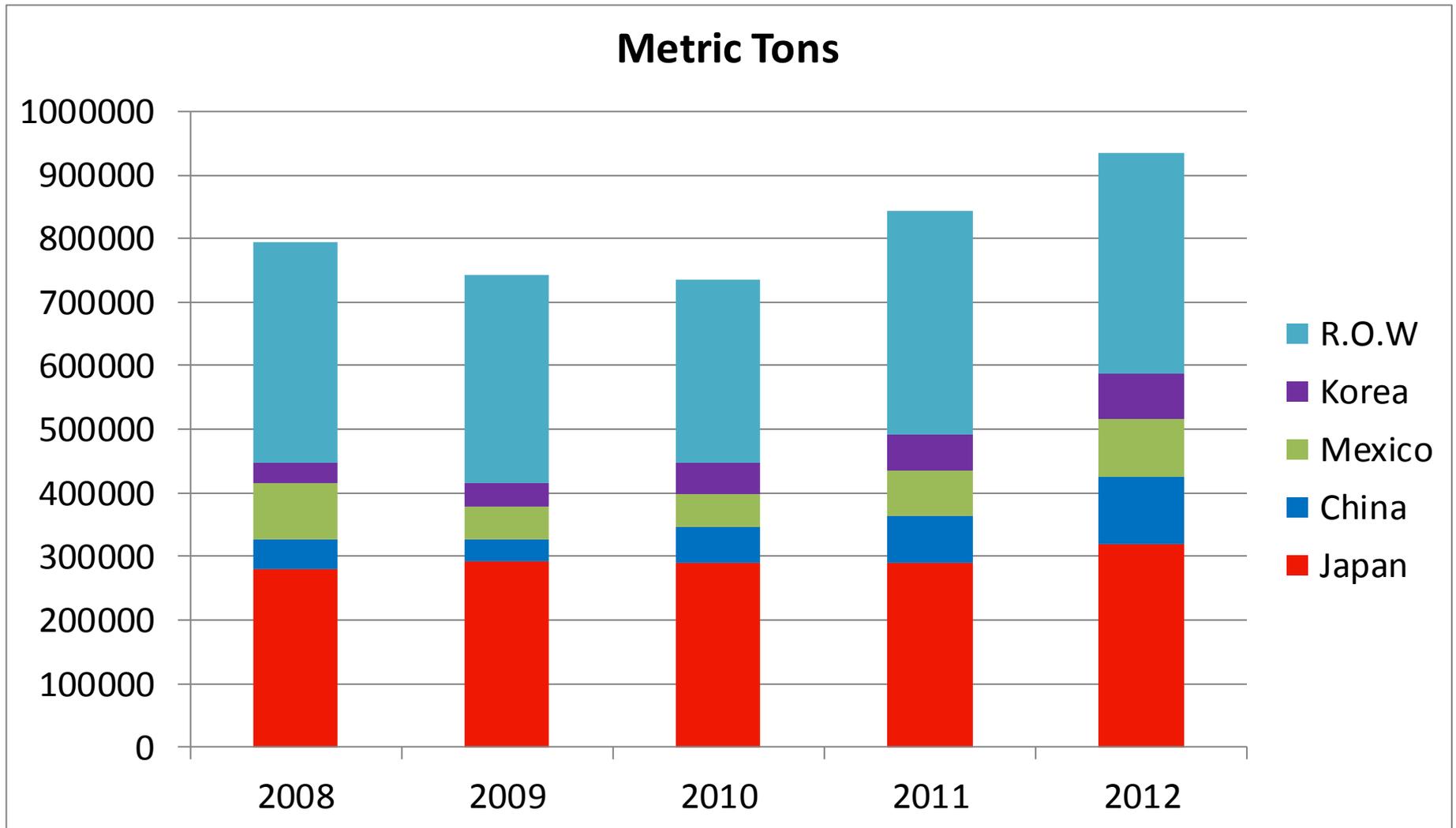


WBUS Outcomes





US Frozen Exports





WBUS Outcomes-

* # of chains/ operations switching to US or upgrading to US frozen item(s)

FY13 = 28



WBUS Outcomes-

* Increased sales of US fries- other than just shoestring- additions

FY13 = 48



Thank you!

