

# TOTAL DAIRY RETAIL SNAPSHOT

52 Weeks, 2025YTD and 4 Weeks Ending 3-23-2025



## RETAIL DAIRY GROWTH EXCEEDS THAT OF TOTAL FOOD & BEVERAGES IN 2025

As of 2025YTD ending 3-23, we are seeing a 5.4% rise in overall dollar sales of dairy products and a 2.6% increase in unit sales compared to the same period last year. Across all regions, growth patterns indicate an upward trend in 2025, although the last four weeks have shown a more modest increase. The timing of the Easter holiday may account for part of this, as the current data does not include Easter 2025 but does compare to Easter 2024.

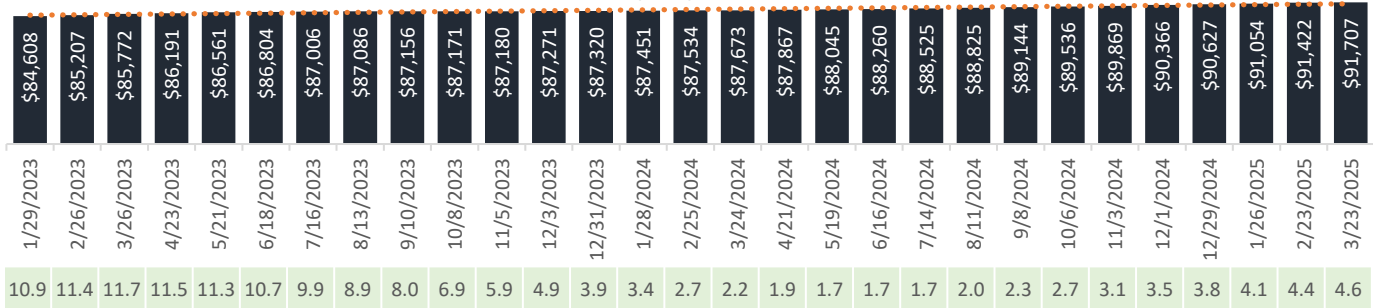
The volume of individual dairy products purchased per buyer has increased this past year, with penetration upticks for half of the categories, with yogurt and butter seeing notable buyer increases among the top products.

Ice cream and frozen novelties are the only categories not registering volume growth in 2025; both are currently facing declines of less than 1%. Butter has seen a 2.7% decrease in the latest four weeks though it typically experiences a buying surge around Easter, which is not reflected in these figures.

Dairy is a trusted industry among consumers, valued for the enjoyment it provides and its strong nutritional profile. Adapting to meet changing consumer needs will position it well for continued growth

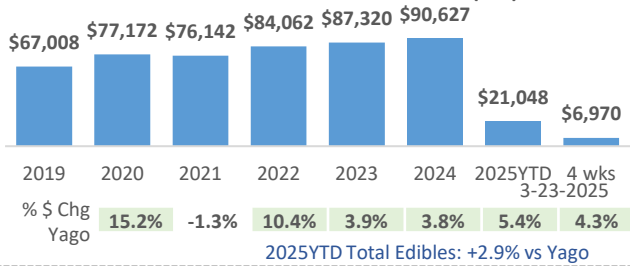
## Rolling 52 Weeks Dollar Trend

TOTAL DAIRY DOLLARS (\$Mil) and % CHANGE VS YEAR AGO



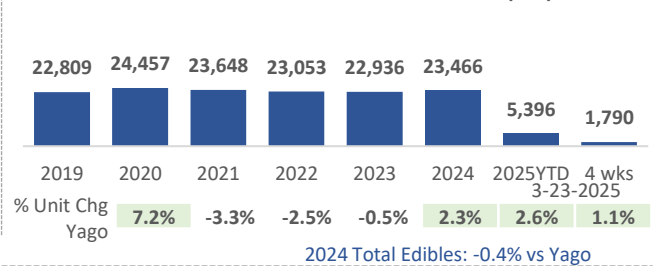
## Calendar Year Dollar Trend

TOTAL DAIRY RETAIL DOLLARS (Mil)



## Calendar Year Unit Trend

TOTAL NUMBER DAIRY UNITS SOLD (Mil)



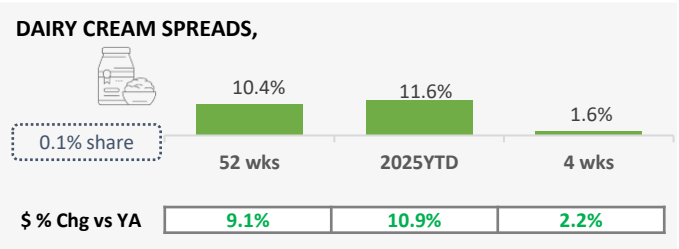
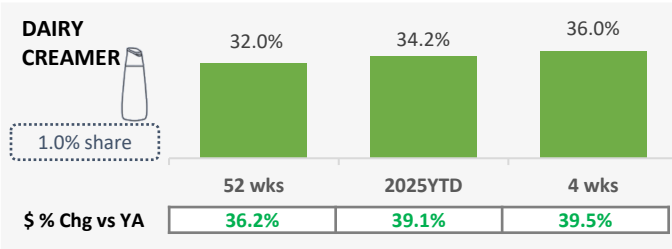
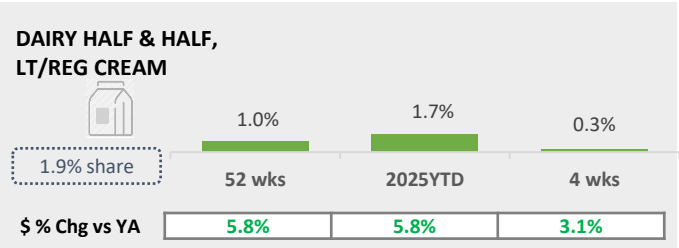
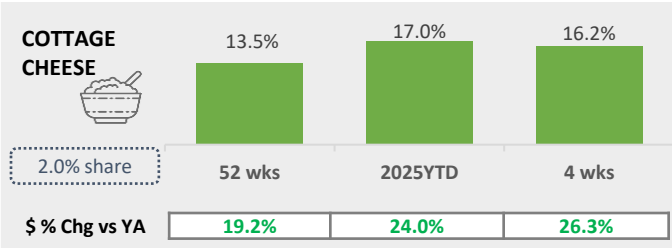
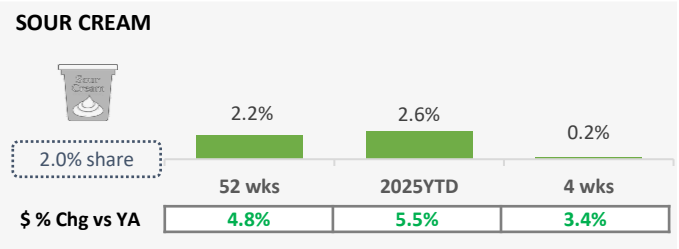
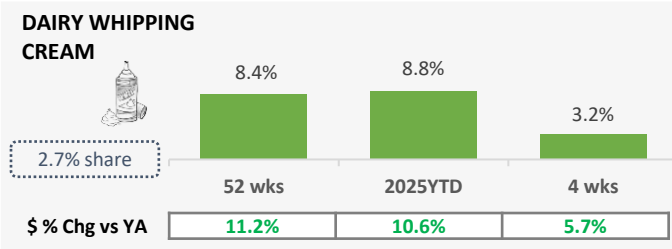
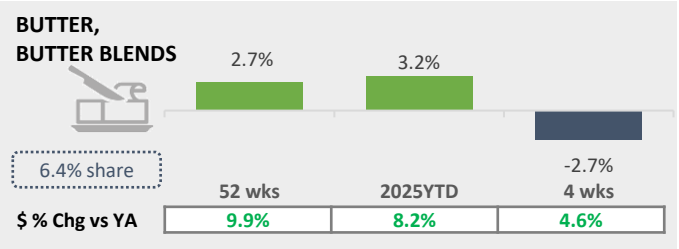
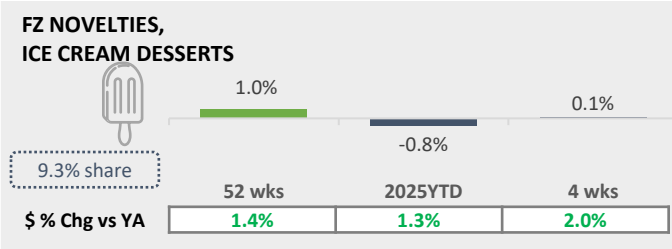
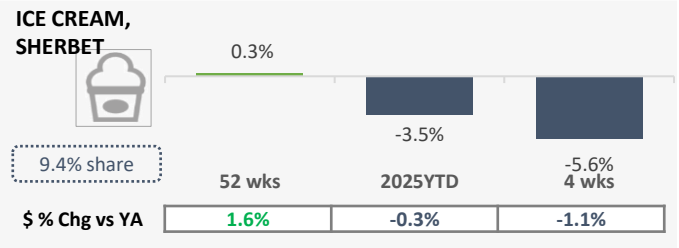
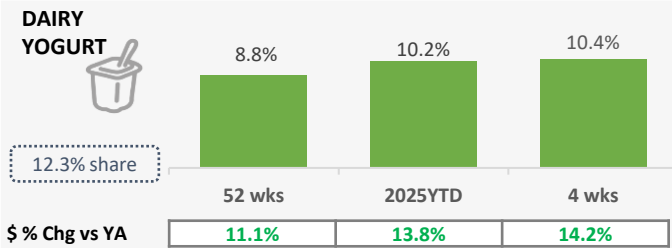
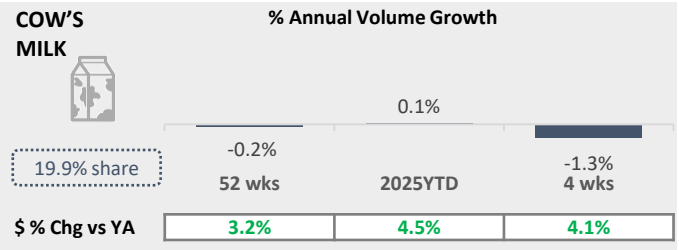
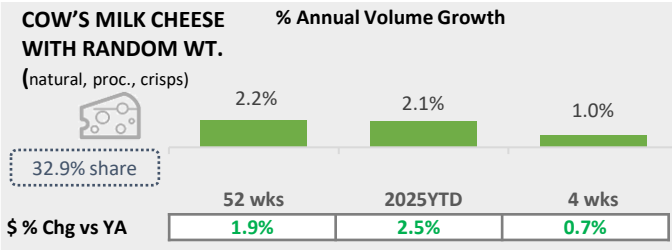
## Purchase Dynamics, 52 Weeks ending 3-23-2025

Product	% Households Buy	Pt Chg vs Yago	Volume per Buyer	Vol/Buyer % Chg vs Yago	# Trips per Buyer	% Chg Trips/Buyer	Volume per Trip	% Chg Vol/Trip
Cheese – Nat, proc, crisps	96.4%	0.1	42.1 lbs	3.2	28.9	4.3	1.5	-0.3
Cow's Milk	91.7%	0.0	29.6 gal	1.2	30.0	2.4	1.0	-0.9
Ice Cream, Sherbet	82.2%	-0.2	41.8 pints	0.9	10.3	1.5	4.1	0.1
Dairy Yogurt	82.2%	1.1	39.5 pints	7.8	16.4	9.2	2.4	0.4
Fz. Novelties	77.9%	-0.7	22.7 16 oz pkg	2.3	9.7	1.6	2.3	0.7
Butter, Blends	77.5%	1.0	12.5 lbs	2.3	7.9	6.2	1.6	-2.0
Sour Cream	72.0%	-0.3	8.1 pints	3.4	7.0	4.3	1.2	-0.6
Dairy Whipping Cream	61.5%	1.5	9.0 pints	6.5	6.1	8.4	1.5	1.7
Cottage Cheese	46.4%	2.3	11.6 pints	8.2	6.9	13.2	1.7	1.0
Dairy H+H, Lt/Reg Cream	32.9%	-0.2	22.4 pints	1.7	8.8	2.3	2.6	-0.6
Dairy Creamer	16.9%	2.2	14.5 pints	14.2	6.1	31.5	2.4	1.0
Dairy Cream Spreads	2.9%	-0.1	3.5 pints	15.1	3.4	7.6	1.0	8.6

# TOTAL DAIRY RETAIL SNAPSHOT

52 Weeks, 2025YTD and 4 Weeks Ending 3-23-2025

## Product Volume/Dollar % Change vs Year Ago and 52 Week \$ Share of Total Dairy Categories



Note: Categories that are not labeled as "cow" or "dairy" may include non-dairy. In most cases, this is very small except for frozen novelties.

# TOTAL DAIRY RETAIL SNAPSHOT

52 Weeks, 2025YTD and 4 Weeks Ending 3-23-2025

## Retail Pricing Dairy prices have seen upticks across most categories.

Average Price per Vol. Equivalent

% Price Change vs. Year Ago

Category	52 Wks	2025YTD	4 wks
Cow's Milk Cheese incl random wt (prc/lb)	\$5.57	\$5.60	\$5.60
Cow's Milk (prc/gal)	\$5.20	\$5.22	\$5.28
Wht Conventional Gallon-size	\$3.58	\$3.60	\$3.62
Dairy Yogurt (pint)	\$2.80	\$2.81	\$2.82
Ice Cream, Sherbet (prc/pint)	\$1.95	\$2.04	\$2.06
Fz Novelties ( prc 16 oz pkg)	\$3.75	\$3.93	\$3.93
Butter/Blends (lb)	\$4.87	\$4.99	\$4.95
Dairy Whip Cream, liquid/aerosol (prc/pint)	\$3.58	\$3.55	\$3.64
Sour Cream (prc/pint)	\$2.56	\$2.60	\$2.61
Dairy Half & Half, Lt/Reg Cream (prc/pint)	\$1.80	\$1.81	\$1.80
Cottage Cheese (prc/pint)	\$2.64	\$2.69	\$2.72
Dairy Creamer (prc/pint)	\$2.94	\$3.02	\$3.07
Dairy Cream Spreads – (prc/pint)	\$4.20	\$4.27	\$4.23

Category	52 Wks	2025YTD	4 wks
Cow's Milk Cheese incl random wt (prc/lb)	-0.2%	0.9%	0.6%
Cow's Milk (prc/gal)	3.6%	4.9%	5.8%
Wht Conventional Gallon-size	2.8%	3.8%	4.9%
Dairy Yogurt (pint)	1.9%	3.1%	3.2%
Ice Cream, Sherbet (prc/pint)	1.3%	3.1%	4.5%
Fz Novelties ( prc 16 oz pkg)	0.4%	2.1%	1.7%
Butter/Blends (lb)	7.0%	4.6%	6.8%
Dairy Whip Cream, liquid/aerosol (prc/pint)	2.6%	1.7%	2.5%
Sour Cream (prc/pint)	2.6%	2.9%	3.3%
Dairy Half & Half, Lt/Reg Cream (prc/pint)	4.8%	4.0%	2.9%
Cottage Cheese (prc/pint)	5.0%	5.9%	6.7%
Dairy Creamer (prc/pint)	4.0%	6.7%	7.0%
Dairy Cream Spreads – (prc/pint)	-1.1%	-0.6%	0.6%

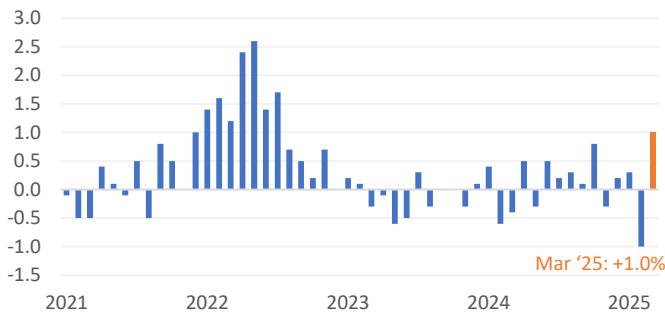


The CPI measures change in consumer prices over time based on a basket of goods.

*Note: butter is not included in 'dairy'. It is considered part of fats & oils.*

## Consumer Price Index – Dairy Products

Month-over-month % change, Jan 2021–Mar 2025  
seasonally adjusted



12 Month Inflation Rate  
not seasonally adjusted

The overall (all items) 12-month inflation rate was 2.4% in March 2025, down from 2.8% in February. The at-home food index rose from Feb as did dairy product prices.

	All Items	Food Away-from Home	Food At-Home
Feb '25	2.8%	3.7%	1.9%
Mar '25	2.4%	3.8%	2.4%

	Dairy	Milk	Cheese	Ice Cream	Butter
Feb '25	0.8%	1.5%	0.0%	0.8%	1.9%
Mar '25	2.2%	2.9%	2.2%	1.2%	5.5%

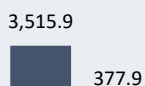
## REAL Dairy vs. Alternatives Spotlight

Across milk, cheese, yogurt and whipping cream, REAL dairy is larger than non-dairy with more favorable performance.

52 WEEKS ENDING 3-23-2025 RETAIL VOLUME % CHANGE VS. YEAR AGO

■ Dairy ■ Non-Dairy Alternatives

Dairy:  
90% Vol share



Milk, gallons

Vol % Chg	-0.2%	-5.8%
Vol Chg	-5.8M gal	-23.2M gal

Dairy:  
99% Vol share

5,414.3



Cheese, pounds

Vol % Chg	+2.1%	-4.7%
Vol Chg	+108.9M lbs	-1.5M lbs

Dairy:  
98% Vol share

4,047.8



Yogurt, pints

Vol % Chg	+9.0%	0.4%
Vol Chg	+333.6M pts	0.2M pts

Dairy:  
99% Vol share

692.7

6.4

Whipping Cream

Vol % Chg	+8.4%	+7.7%
Vol Chg	+53.7M pts	+0.5M pts

Dairy:  
35% Vol share

1,251.6

2,302.6

Cream/Creamer, pints

Vol % Chg	+7.0%	+0.7%
Vol Chg	+81.4M pts	+14.9M pts

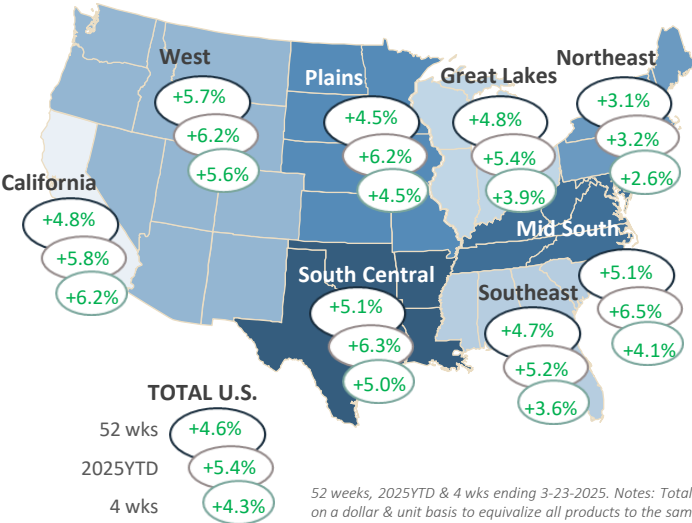
*Dairy: natural + processed + crisps, excludes goat & sheep*

# TOTAL DAIRY RETAIL SNAPSHOT

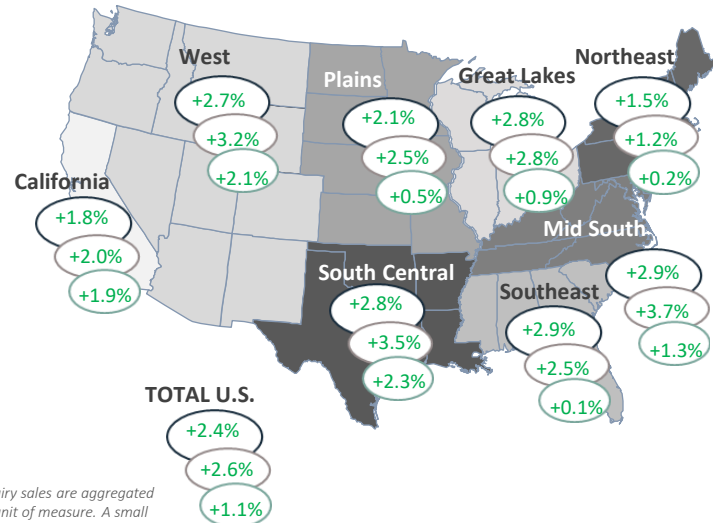
52 Weeks, 2025YTD and 4 Weeks Ending 3-23-2025

## Total Dairy Category Sales View by Region

Dollar Sales % Chg vs. Year Ago



Unit Sales % Chg vs. Year Ago



52 weeks, 2025YTD & 4 wks ending 3-23-2025. Notes: Total dairy sales are aggregated on a dollar & unit basis to equalize all products to the same unit of measure. A small amount of non-dairy is included in these numbers. Butter excludes margarine.

## Product Sales View by Region

Latest 52 Week Regional View: Volume Sales % Change vs. Year Ago

	Cow's Milk Cheese	Cow's Milk	Dairy Yogurt	Ice Cream, Sherbet	Fz Novelties	Butter, Blends	Dairy Whip Cream	Sour Cream	Dairy H&H, Cream	Cottage Cheese	Dairy Creamer	Dairy Spread
<b>TOTAL U.S.</b>	2.1%	-0.2%	9.0%	0.4%	1.0%	2.6%	8.4%	2.1%	1.0%	13.5%	30.9%	10.4%
California	2.2%	0.4%	8.5%	1.6%	0.5%	-0.2%	5.6%	3.4%	1.8%	15.1%	30.0%	10.8%
Great Lakes	2.4%	-0.4%	9.4%	0.0%	4.1%	1.5%	9.1%	1.3%	1.8%	9.7%	31.2%	31.3%
Mid-South	2.4%	0.1%	9.8%	0.1%	1.7%	3.1%	13.1%	2.4%	-1.2%	15.0%	28.6%	-0.9%
Northeast	0.3%	-1.0%	7.3%	-0.3%	-0.9%	1.0%	6.2%	1.0%	-0.1%	15.3%	22.6%	10.8%
Plains	2.7%	-0.5%	8.9%	0.3%	0.8%	2.8%	5.4%	1.5%	3.1%	9.7%	35.1%	13.1%
S. Central	2.4%	-0.4%	10.3%	0.7%	0.7%	5.9%	10.5%	2.8%	3.8%	16.6%	35.2%	12.1%
Southeast	2.4%	0.5%	9.4%	1.1%	0.5%	3.1%	9.8%	1.5%	1.6%	16.8%	35.8%	9.8%
West	2.5%	0.2%	9.2%	0.6%	0.4%	5.1%	7.1%	3.0%	1.1%	14.3%	33.5%	9.5%

## New Product Spotlight

A sampling of new dairy products launched recently



USA (Mar '25)

**Rosebud** Soft-serve ice cream in a spouted pouch.

Source: Innova



USA (Apr '25)

**Two Spoons** High-protein ice cream with zero added sugar and GLP-1 friendly ingredients. Each container is 30g protein/12g per serving.



USA (Mar '25)

**Kellanova** Ice cream flavors inspired by Kellogg's classic cereals.