

# TOTAL DAIRY RETAIL SNAPSHOT

52 Weeks, Year-to-date, and 4 Weeks Ending 2-22-2026



## DAIRY UNIT SALES UP 2% YTD; RECENT SOFTNESS DRIVEN BY WEATHER DISRUPTIONS

2026YTD dairy unit sales are growing at 2%, in line with 2025 trends. However, the most recent 4-week period reflects temporary softness, largely driven by winter storms in late January, followed by a normalization phase.

Dairy pricing remains relatively stable. While the consumer price index increased +2.4% year-over-year, at-home food prices also rose 2.4%. Cheese and butter experienced price declines, milk saw a slight increase, and ice cream posted notable price gains.

Across the 52-week and 2026YTD periods ending 2-22-26, all regions delivered sales growth, with six categories expanding consistently nationwide: cheese, yogurt, butter, whipping cream, cottage cheese, and dairy creamer. In contrast, milk declined modestly (<=1%) across regions, while ice cream experienced a more pronounced decline.

Growth is being led by yogurt, cottage cheese, and cream-based segments. Cottage cheese stands out as a

breakout performer, accelerating from growth of +8.6% growth in 2023 to +14.3% in 2025 and maintaining a strong +13.4% pace in 2026YTD – one of the most consistent growth stories in dairy. Yogurt continues to show durable momentum, growing +9.0% in 2025 and +6.6% YTD.

Whipping cream and creams & creamers remain strong, with whipping cream volumes increasing +7-9% each year and cream & creamers growing by +7% in both 2025 and 2026. Butter/blends provide steady growth with increases of +2-3% each year since 2023. Cheese remains a core staple with modest but consistent growth in 2023-26YTD.

Milk continues to face pressure, with a gradual decline. However, there has been structural improvement since 2024.

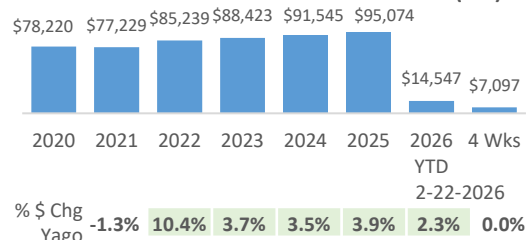
## Rolling 52 Weeks Dollar Trend

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



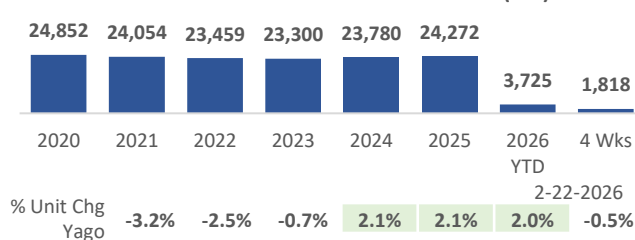
## Calendar Year Dollar Trend

TOTAL DAIRY RETAIL DOLLARS (Mil)



## Calendar Year Unit Trend

TOTAL NUMBER DAIRY UNITS SOLD (Mil)



By week

Dollars	% Chg vs Yago
4 wks end 1-25	+4.4%
wk end 1-4	-1.1%
wk end 1-11	-1.2%
wk end 1-18	+0.5%
wk end 1-25	+20.2%
4 wks end 2-22	-0.5%
wk end 2-1	-2.9%
wk end 2-8	-1.4%
wk end 2-15	-0.2%
wk end 2-22	+2.6%



## Purchase Dynamics, 52 Weeks ending 2-22-2026

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	96.7%	0.1	42.4 lbs	-0.1	29.2	0.8	1.5	-0.2
Cow's Milk	91.5%	-0.1	29.7 gal	0.7	30.3	1.9	1.0	-0.8
Yogurt	84.0%	0.9	42.4 pints	7.5	17.4	7.6	2.4	1.6
Ice Cream, Sherbet	81.3%	-1.1	41.8 pints	-0.2	10.4	1.4	4.0	-2.3
Butter, Blends	78.1%	0.5	12.6 lbs	1.6	8.0	2.8	1.6	0.2
Frozen Novelties	77.7%	-0.1	23.1 16 oz pkg	1.8	9.8	1.8	2.4	0.5
Sour Cream	71.9%	-0.3	8.3 pints	0.7	7.0	0.1	1.2	0.7
Dairy Whipping Cream	61.5%	0.1	9.2 pints	2.5	6.2	2.9	1.5	0.4
Cottage Cheese	48.8%	2.7	12.5 pints	7.9	7.3	13.9	1.7	0.8
Dairy H+H, Lt/Reg Cream	32.5%	-0.6	22.8 pints	2.4	8.8	0.0	2.6	1.1
Dairy Creamer	20.0%	3.5	15.5 pints	5.7	6.4	28.3	2.4	0.3
Dairy Cream Spreads	1.3%	0.2	3.3 pints	-2.9	3.4	28.4	0.9	-8.2

# TOTAL DAIRY RETAIL SNAPSHOT

52 Weeks, Year-to-date, and 4 Weeks Ending 2-22-2026

## Long-term Volume Sales Trend: % Change vs. Year Ago Heat Map

Product	2022	2023	2024	2025	2026YTD ending 2-22
Cheese	-0.4%	0.5%	2.0%	1.0%	1.1%
Milk	-2.6%	-2.0%	-0.3%	-0.5%	-0.1%
Yogurt	-1.6%	3.5%	7.4%	9.0%	6.6%
Fz Novelties	0.1%	-2.2%	1.2%	0.5%	0.4%
Ice Cream/Sherbet	-3.5%	-1.1%	1.1%	-2.3%	-0.8%
Butter/Blends	-0.7%	2.8%	1.8%	1.8%	3.5%
Dairy Whipping Cream	3.7%	7.9%	8.7%	8.2%	7.2%
Dairy Cream & Creamer	1.1%	0.5%	5.9%	7.3%	6.7%
Sour Cream	-0.1%	-0.7%	1.9%	-0.2%	-0.1%
Cottage Cheese	-3.5%	8.6%	12.5%	14.3%	13.4%

10%+  
5 to 9.9%  
2 to 4.9%  
1 to 1.9%  
-1 to 0.9%  
-2 to -1.1%  
-4 to -2.1%

## Retail Pricing

### Average Price per Vol. Equivalent

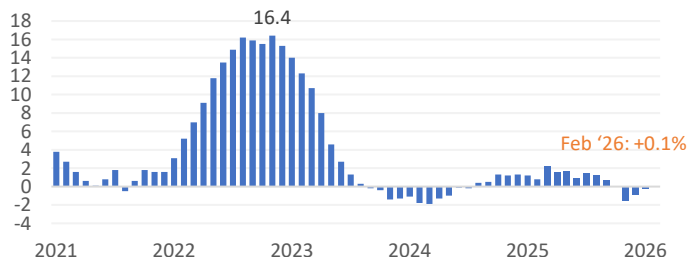
Category	Latest 52 Wks	2026YTD (2/22)	Latest 4 Wks
Cheese incl random wt (price/lb)*	\$5.59	\$5.54	\$5.51
Cow's Milk (price/gal)	\$5.30	\$5.24	\$5.23
White Conventional Gallon-size	\$3.53	\$3.46	\$3.44
Yogurt (price/pint)	\$2.94	\$2.95	\$2.95
Ice Cream, Sherbet (price/pint)	\$2.00	\$2.06	\$2.06
Fz Novelties ( price 16 oz pkg)	\$3.86	\$4.06	\$4.08
Butter/Blends (price/lb)	\$4.76	\$4.64	\$4.56
Dairy Whip Cream, liquid/aerosol (prc/pint)	\$3.61	\$3.44	\$3.43
Sour Cream (price/pint)	\$2.62	\$2.64	\$2.62
Dairy Half & Half, Lt/Reg Cream (prc/pint)	\$1.80	\$1.77	\$1.77
Cottage Cheese (price/pint)	\$2.75	\$2.81	\$2.84
Dairy Creamer (price/pint)	\$3.00	\$3.04	\$3.07
Dairy Cream Spreads – (price/pint)	\$4.43	\$4.40	\$4.34

### % Price Change vs. Year Ago

Category	Latest 52 Wks	2026YTD (2/22)	Latest 4 Wks
Cheese incl random wt	-0.5%	-1.8%	-1.4%
Cow's Milk	2.5%	1.2%	1.0%
Wht Conventional Gallon-size	-1.0%	-3.4%	-3.7%
Dairy Yogurt	4.7%	4.8%	4.9%
Ice Cream, Sherbet	2.9%	1.8%	1.7%
Fz Novelties	3.1%	3.3%	4.1%
Butter/Blends	-2.2%	-8.1%	-9.0%
Dairy Whip Cream, liquid/aerosol	-4.3%	-6.8%	-8.1%
Sour Cream	1.7%	0.8%	0.8%
Dairy Half & Half, Lt/Reg Cream	0.1%	-2.0%	-2.2%
Cottage Cheese	4.6%	4.9%	5.2%
Dairy Creamer	2.7%	3.3%	3.8%
Dairy Cream Spreads	3.5%	2.3%	1.8%

## Consumer Price Index – Dairy Products

12 Month % Change, Jan 2021–Mar 2026  
not seasonally adjusted



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

### 12 Month Inflation Rate, not seasonally adjusted

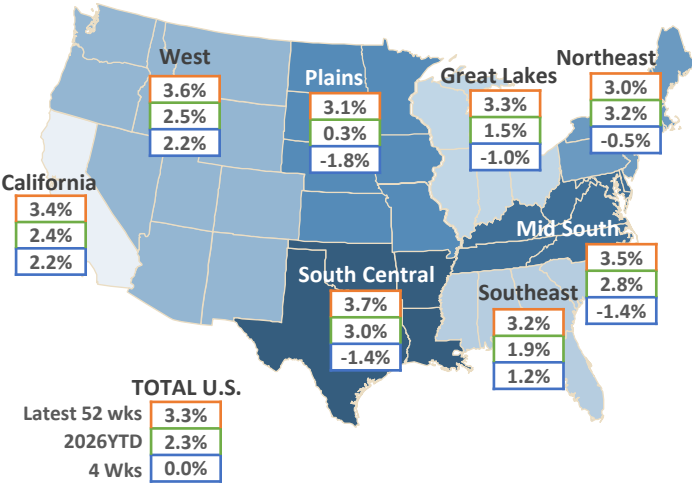
	Jan '26	Feb '26
<b>All Items</b>	<b>2.4%</b>	<b>2.4%</b>
Food Away-from-home	4.0%	3.9%
Food At-home	2.1%	2.4%
Dairy	-0.3%	0.1%
Milk	-0.3%	0.5%
Cheese	-1.2%	-1.1%
Ice Cream	0.1%	3.6%
Butter	-5.0%	-7.6%

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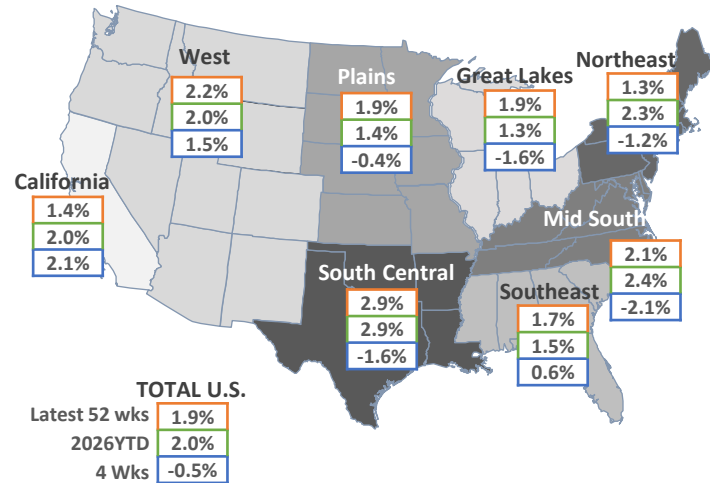
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## Total Dairy Category Sales View by Region

Dollar Sales % Chg vs. Year Ago



Unit Sales % Chg vs. Year Ago



52 wks, 2026YTD & 4 wks ending 2-22-2026. 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 Weeks Regional View: Volume Sales % Change vs. Year Ago

	Cheese w Random Wt	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>	<b>0.8%</b>	<b>-0.6%</b>	<b>8.6%</b>	<b>-2.2%</b>	<b>0.7%</b>	<b>1.7%</b>	<b>7.5%</b>	<b>-0.5%</b>	<b>0.3%</b>	<b>13.9%</b>	<b>28.2%</b>	<b>15.6%</b>
California	0.7%	-0.2%	7.3%	-3.7%	-0.1%	1.0%	2.4%	-0.5%	0.9%	16.4%	31.3%	11.5%
Great Lakes	0.9%	-0.9%	9.5%	-1.6%	0.4%	2.0%	9.6%	-0.6%	-0.3%	9.4%	32.4%	17.7%
Mid-South	0.7%	-0.5%	9.1%	-2.6%	0.9%	2.0%	9.8%	-0.7%	-0.2%	14.0%	25.0%	-5.7%
Northeast	0.6%	-0.5%	7.3%	-2.5%	0.2%	2.6%	7.8%	-1.1%	-0.9%	14.6%	23.9%	-4.2%
Plains	1.3%	-1.0%	9.6%	-2.2%	1.8%	1.7%	8.9%	-0.1%	-2.1%	9.0%	33.7%	17.7%
S. Central	0.9%	-0.9%	10.0%	-1.6%	1.7%	2.9%	9.9%	0.2%	4.2%	18.8%	29.1%	49.3%
Southeast	0.5%	-0.5%	8.3%	-2.0%	0.4%	0.3%	9.0%	-1.0%	1.2%	19.7%	22.9%	7.3%
West	1.3%	-0.4%	8.5%	-1.5%	0.9%	0.9%	2.9%	0.1%	1.1%	15.0%	34.3%	4.4%

## New Product Spotlight A sampling of new dairy products launched recently



**USA (Mar '26)**  
Knudsen Low fat cottage cheese and black cherry, raspberry, or blueberry topping. 13g of protein per container.



**USA (Mar '26)**  
Tillamook Limited edition condiment that blends Kewpie mayonnaise with Tillamook butter and savory spices. Perfect for grilled cheese.



**USA (Mar '26)**  
Nurri Ultra filtered lactose-free protein creamer with salted caramel or sweet cream flavor. 5g protein and 1g sugar per 4 tbsp preparation. Made with real milk and cream.



**UK (Mar '26)**  
Smug Butter blended with oat. 30% less saturated fat than standard butter. Rich in vitamins A, D2, E and B12. Vitamin B12 helps your immune system to work normally.



**UK (Mar '26)**  
Sublime Spiced dark chocolate butter. Rich, velvety and warm with notes of cinnamon, cardamom, nutmeg and clove.