

# TOTAL U.S. CHEESE SNAPSHOT

52 Weeks, 13 Weeks and 4 Weeks Ending 1-25-2026



## Retail Cheese Volume Rebounds in the Latest 4 Weeks as Winter Storm Stock-ups Boost Sales

- **Total cheese volume grew 3.9% year over year in the latest four weeks.** Volume was down versus year ago in the first three weeks of the year but surged as consumers stocked up ahead of winter storms. Growth continues to be driven primarily by **natural cheese (87% share)** which increased **+4.3%**, while processed cheese turned temporarily positive at **+1.5%** in the latest four weeks..
- **Club and other value-oriented channels are gaining momentum.** Combined supercenters/club/other outlets grew **+7.0%** in the latest four weeks while traditional grocery channels increased **+1.4%**, signaling a continued shift toward value-focused shopping.
- **Mozzarella leads growth among major varieties.** Natural mozzarella (16% share) delivered a strong **+5.9%** four-week gain. Hispanic varieties also performed well, rising **+8%**, while Parmesan grew **+6.0%**. Cheddar, the largest variety at 20% share, grew more modestly at **+1.4%**.
- **Snackable and convenient formats continue to resonate.** Strong gains were seen in grab-and-go (**+19.6%**)

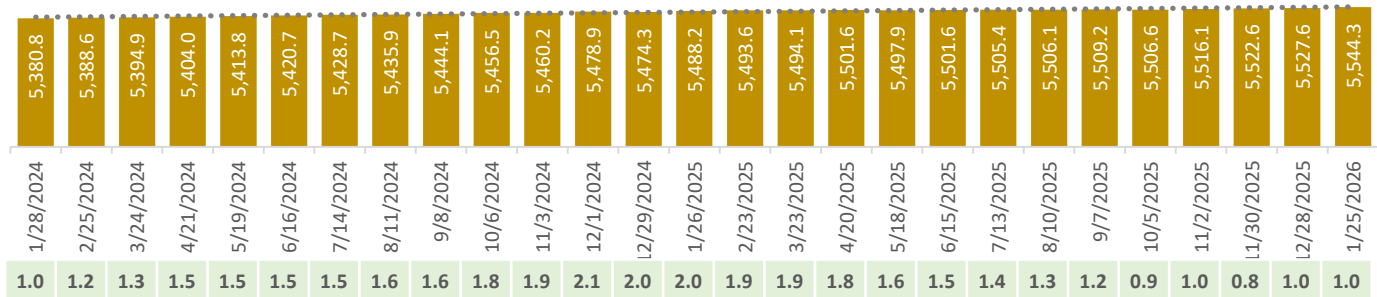
cheese cubes (+12.6%), and cheese balls – primarily mozzarella - (+15.7%), reinforcing cheese's role in **protein snacking occasions**.

- **Brick-and-mortar remains dominant**, accounting for 88% of cheese category volume, though e-commerce continues to expand quickly, now representing 12% share.

## Rolling 52 Weeks Volume Trend

\* Total cheese includes small segments of vegan and imitation

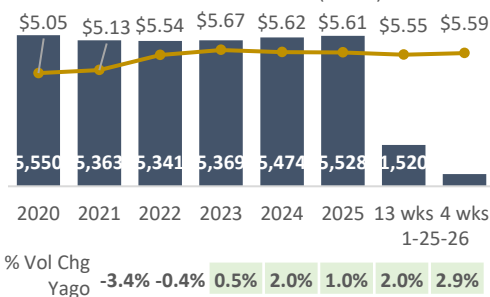
### RETAIL CHEESE VOLUME (M Lbs) and % CHANGE VS YEAR AGO



## Calendar Year Volume and Price Trend

### TOTAL RETAIL CHEESE

Vol. Sales (M Lbs)



### By week

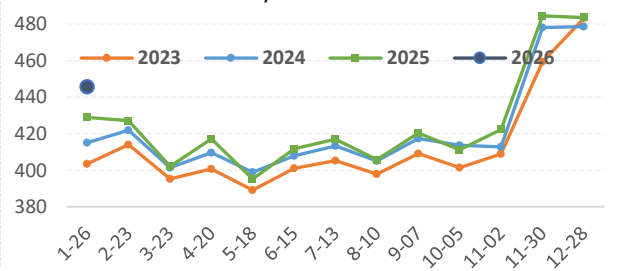
#### Volume % Chg vs Yago

4 wks end 1-25	3.9%
wk end 1-4	-0.7%
wk end 1-11	-3.4%
wk end 1-18	-2.0%
wk end 1-25	+23.2%

## Quad-week Sales View

### CHEESE RETAIL VOLUME, Million Pounds

By 4-Week Periods



## Purchase Dynamics, Latest 52 Weeks

Note: Cheese includes small segments of vegan/imitation

How did buying behavior change over the last 52 wks?

**Penetration**  
96.9% of households bought cheese  
+0.1 pts vs Yago

**Buy Rate**  
42.6 lbs per buyer  
+0.5% vs Yago

**Purchase Frequency**  
29.5 X/yr  
+0.8% vs Yago

**Purchase Size**  
1.4 lbs/trip  
-0.3% vs Yago

## Regional Volume Trend

% Chg vs Yago	Volume Index	Latest 52 Wks	Latest 13 Wks	Latest 4 Wks
<b>TOTAL U.S.</b>	<b>100</b>	1.0%	2.0%	3.9%
California	79	0.6%	0.8%	1.2%
Great Lakes	105	1.2%	2.5%	3.3%
Mid-South	106	1.1%	2.6%	6.1%
Northeast	97	0.7%	2.5%	6.5%
Plains	120	1.7%	2.1%	1.8%
South Central	84	1.3%	2.6%	6.4%
Southeast	105	0.4%	1.1%	2.1%
West	114	1.5%	1.7%	2.3%

# TOTAL U.S. CHEESE SNAPSHOT

52 Weeks, 13 Weeks and 4 Weeks Ending 1-25-2026

## Largest Cheese Types Volume Trend

	52 Wks Volume (M lbs)	52 Wks Vol Share	Latest 52 Wks	Latest 13 Wks	Latest 4 Wks
<b>Total Cheese</b>	<b>5,543.2</b>	<b>100.0%</b>	<b>1.0%</b>	<b>2.0%</b>	<b>3.9%</b>
<b>Total Natural</b>	<b>4,828.7</b>	<b>87.1%</b>	<b>1.7%</b>	<b>2.5%</b>	<b>4.3%</b>
Cheddar	1,131.4	20.4%	0.1%	0.1%	1.4%
Mozzarella	890.1	16.1%	2.5%	4.1%	5.9%
Cream Cheese	557.5	10.1%	0.3%	1.6%	3.1%
Blend	491.4	8.9%	-0.1%	1.2%	3.4%
Colby Jack	364.4	6.6%	4.1%	6.4%	8.5%
Hispanic	202.5	3.7%	11.1%	8.2%	8.0%
Parmesan	201.0	3.6%	2.7%	3.6%	6.0%
Swiss	137.8	2.5%	-2.4%	-0.1%	2.8%
Pepper Jack	106.5	1.9%	-0.5%	2.0%	4.7%
Ricotta	104.5	1.9%	1.9%	1.6%	1.0%
Provolone	92.0	1.7%	0.9%	4.7%	5.9%
Monterey Jack	89.4	1.6%	-0.5%	1.0%	3.2%
Feta	63.0	1.1%	2.3%	-0.2%	2.0%
Gouda	50.0	0.9%	7.9%	10.0%	15.1%
Muenster	49.6	0.9%	1.0%	5.0%	5.9%
Havarti	31.4	0.6%	-4.2%	-1.3%	0.3%
Goat	21.6	0.4%	1.2%	0.9%	1.8%
Brie	17.0	0.3%	-4.0%	0.0%	7.4%
Colby	12.4	0.2%	-7.8%	-4.9%	-5.0%
<b>Total Processed</b>	<b>713.9</b>	<b>12.5%</b>	<b>-3.2%</b>	<b>-0.9%</b>	<b>1.5%</b>
American	489.6	8.6%	-2.4%	0.3%	2.4%
<b>Total Imitation/Plant</b>	<b>21.8</b>	<b>0.4%</b>	<b>-9.2%</b>	<b>-6.8%</b>	<b>-4.5%</b>

## Largest Cheese Types Pricing Trend

	-- Avg Price/Gal--			-- % Chg vs Yago --		
	Latest 52 Wks	Latest 13 Wks	Latest 4 Wks	Latest 52 Wks	Latest 13 Wks	Latest 4 Wks
<b>Total Cheese</b>	<b>\$5.60</b>	<b>\$5.55</b>	<b>\$5.58</b>	<b>-0.4%</b>	<b>-2.4%</b>	<b>-2.3%</b>
<b>Total Natural</b>	<b>\$5.69</b>	<b>\$5.62</b>	<b>\$5.67</b>	<b>-0.4%</b>	<b>-2.7%</b>	<b>-2.6%</b>
Cheddar	\$5.21	\$5.14	\$5.19	-0.7%	-3.4%	-3.3%
Mozzarella	\$4.88	\$4.75	\$4.78	0.5%	-3.5%	-3.7%
Cream Cheese	\$5.33	\$5.03	\$5.36	-2.7%	-4.8%	-4.1%
Blend	\$4.70	\$4.66	\$4.67	-1.9%	-5.3%	-5.7%
Colby Jack	\$4.86	\$4.70	\$4.74	-2.4%	-6.6%	-6.9%
Hispanic	\$5.54	\$5.65	\$5.54	-0.3%	0.4%	1.2%
Parmesan	\$9.42	\$9.53	\$9.50	3.3%	2.8%	2.0%
Swiss	\$7.83	\$8.21	\$7.99	2.0%	1.8%	0.9%
Pepper Jack	\$5.41	\$5.24	\$5.26	-1.3%	-6.2%	-6.6%
Ricotta	\$3.25	\$3.21	\$3.36	3.0%	3.0%	3.4%
Provolone	\$6.27	\$6.24	\$6.19	-1.7%	-3.7%	-3.2%
Monterey Jack	\$4.70	\$4.57	\$4.62	-2.7%	-5.8%	-5.5%
Feta	\$9.55	\$9.75	\$9.83	-0.7%	1.2%	1.4%
Gouda	\$8.17	\$8.22	\$8.06	-2.1%	-4.0%	-5.0%
Muenster	\$6.02	\$5.87	\$5.84	-1.8%	-5.6%	-5.5%
Havarti	\$7.31	\$7.48	\$7.22	2.9%	0.4%	-0.5%
Goat	\$13.36	\$12.92	\$13.71	-0.7%	-0.5%	0.4%
Brie	\$12.86	\$12.56	\$12.98	2.9%	2.5%	3.2%
Colby	\$5.47	\$5.23	\$5.48	-0.5%	-3.6%	-1.7%
<b>Total Processed</b>	<b>\$4.85</b>	<b>\$4.88</b>	<b>\$4.89</b>	<b>-0.2%</b>	<b>-0.5%</b>	<b>0.0%</b>
American	\$5.00	\$5.11	\$5.10	-0.3%	-0.8%	-0.4%
<b>Total Imitation/Plant</b>	<b>\$8.05</b>	<b>\$8.13</b>	<b>\$7.92</b>	<b>0.2%</b>	<b>1.0%</b>	<b>0.9%</b>

## Volume Trends by Top Cheese Forms

	Volume % Chg vs Yago			Volume Share
	Latest 52 Wks	Latest 13 Wks	Latest 4 Wks	
<b>Total Cheese</b>	<b>1.0%</b>	<b>2.0%</b>	<b>3.9%</b>	29.8%
Shredded	0.1%	1.0%	2.7%	19.7%
Sliced	-1.1%	0.0%	1.4%	15.5%
Chunk	6.2%	5.1%	7.5%	5.8%
String/Stick	2.0%	3.8%	6.2%	2.3%
Loaf	-2.3%	-0.6%	3.0%	2.0%
Grated	-1.2%	0.4%	4.1%	1.9%
Grab & Go*	4.8%	17.5%	19.6%	1.9%
Ricotta	1.9%	1.6%	1.0%	1.7%
Round	9.1%	3.9%	7.2%	1.3%
Crumbled	0.0%	-0.1%	2.3%	1.2%
Spread	-2.5%	-4.8%	-4.2%	0.7%
Ball	7.6%	23.5%	15.7%	0.6%
Cube	6.7%	9.0%	12.6%	0.6%



\* pre-sliced  
deli cheese

## New Product Spotlight: a sampling of new products



**USA** (Feb 2026)  
**HEB Cheese dip**  
with brisket,  
tomatoes and  
Poblano peppers



**IRELAND** (Feb 2026)  
**SUPERVALU High in protein**  
(10g per  
serving). Made with  
Irish milk.



**USA** (Feb 2026)  
**THE SPICE HOUSE** Savory  
Romano cheese  
and coarse black  
pepper combine  
with luxurious  
truffle and a  
pinch of nutmeg  
to elevate this  
Italian classic.



**USA** (Feb 2026)  
**BABY BEL PRO** Snack cheese  
with 5g protein and 1 billion  
probiotics in 50 calorie snack.



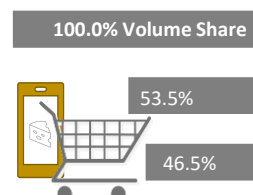
**USA** (Feb 2026)  
**LAUGHING COW**  
Dill pickle flavored  
spreadable cheese  
wedges.

## E-Commerce Sales Trend

E-Commerce, 12% Volume			Brick & Mortar, 88% Volume		
		% chg			% chg
2020	392		2020	5,141	
2021	423	7.9%	2021	4,922	-4.3%
2022	442	4.6%	2022	4,881	-0.8%
2023	491	11.1%	2023	4,861	-0.4%
2024	573	16.7%	2024	4,886	0.5%
2025	666	16.2%	2025	4,848	-0.8%
13 Wks	203	24.2%	13 Wks	1,314.4	-0.7%
4 Wks	63	28.9%	4 Wks	381.8	0.7%

Volume share based on Circana MULO+ outlets

## Volume Share and Trend by Outlet



% Volume Chg vs Yago	Latest 52 Wks	Latest 13 Wks	Latest 4 Wks
<b>TOTAL U.S.</b>	<b>1.0%</b>	<b>2.0%</b>	<b>3.9%</b>
Grocery	-0.6%	-0.5%	1.4%
Supercenters, Club, Other	3.0%	5.2%	7.0%