

# TOTAL U.S. CHEESE SNAPSHOT

52 Weeks, 2025YTD and 4 Weeks Ending 6-15-2025

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## CHEESE RETAIL VOLUME INCREASES 1.5% IN THE LATEST 4 WEEKS COMPARED TO LAST YEAR

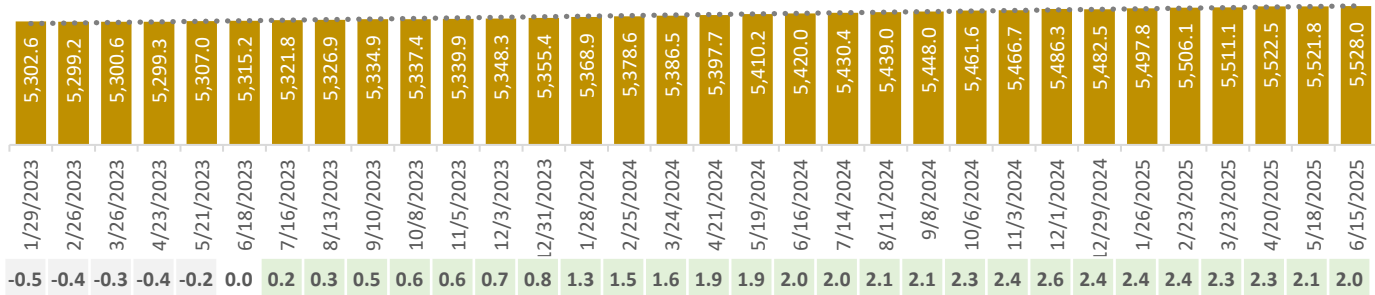
Cheese retail volume over the past 52 weeks has grown 2% year-over-year, slightly outpacing the growth seen in the most recent 4-week period. Buying activity remains solid, and household penetration has seen a modest increase. The natural cheese segment continues to expand, with Queso Fresco and Variety Packs leading growth both year-to-date and over the last four weeks.

- **Mozzarella** has shown the highest increase in absolute volume growth so far in 2025, followed by Colby/Jack blends. Roughly half of mozzarella's growth is tied to its most popular form – shredded. However, chunk mozzarella is also seeing notable gains, contributing disproportionately to size with a 10% increase year-to-date compared to last year. Like mozzarella, the chunk form of **Colby Jack** blends is growing double-digits, contributing more than half its growth.

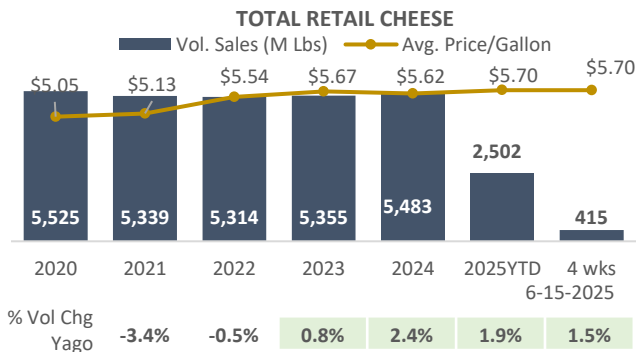
- **Acculturated Hispanics** are the primary drivers of **Queso Fresco's** volume growth, accounting for 86% of the increase yet make up only 11.9% of all U.S. households. (Note: Hispanic families tend to have more members, resulting in larger share of the population, compared to their share of households).
- **Variety Packs** are especially popular among higher income households, with 19% purchasing them over the past year – an increase of two percentage points from the previous year. Variety Pack volume, however, is rising across all income levels.
- **E-commerce sales** of natural cheese are outpacing the overall category growth with strong unit gains of 10% in the latest four weeks and 14% year-to-date. Natural cheese e-commerce sales were \$2.2 billion over the past 52 weeks.

\* Total cheese includes small segments of vegan and imitation

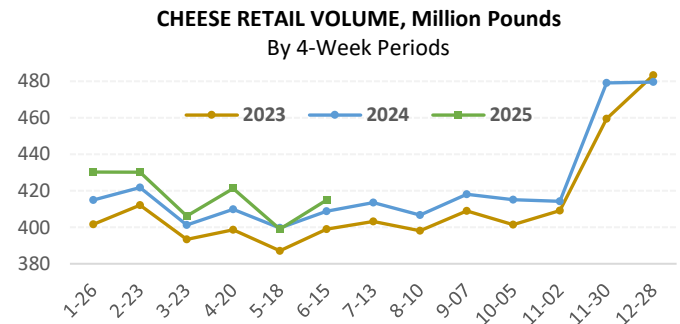
## Rolling 52 Weeks Volume Trend



## Calendar Year Volume and Price Trend

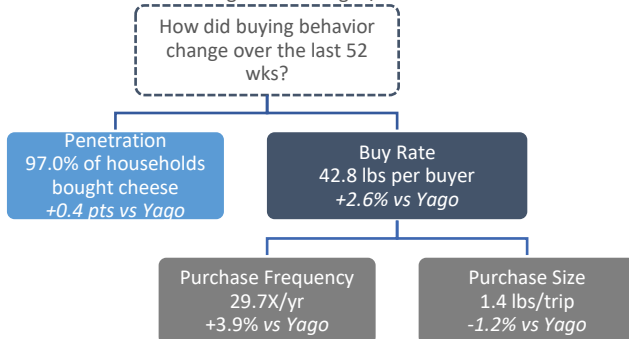


## Quad-week Sales View



## Purchase Dynamics

Note: Cheese includes small segments of vegan/imitation



## Regional Volume Trend

% Chg vs Yago	Volume Index	Latest 52 Wks	2025YTD	Latest 4 Wks
<b>TOTAL U.S.</b>	<b>100</b>	2.0%	1.9%	1.5%
California	80	2.2%	1.9%	2.3%
Great Lakes	105	2.1%	1.9%	1.1%
Mid-South	105	2.2%	2.1%	1.6%
Northeast	97	0.3%	-0.1%	-0.3%
Plains	120	2.6%	2.9%	2.0%
South Central	84	2.5%	2.8%	3.1%
Southeast	105	2.5%	2.1%	1.2%
West	114	2.5%	2.3%	2.4%

# TOTAL U.S. CHEESE SNAPSHOT

52 Weeks, 2025YTD and 4 Weeks Ending 6-15-2025

## Largest Cheese Varieties Volume Trend

	52 Wk Volume (M gal)	52 Wk Vol Share	-- % Vol 52 Wks	Chg vs Yago -- 2025YTD	Latest 4 Wks
<b>Total Cheese</b>	<b>5,528.0</b>	<b>100.0%</b>	<b>2.0%</b>	<b>1.9%</b>	<b>1.5%</b>
<b>Total Natural</b>	<b>4,705.7</b>	<b>100.0%</b>	<b>2.1%</b>	<b>1.7%</b>	<b>1.1%</b>
Cheddar	987.1	21.0%	0.4%	0.9%	0.7%
Cream Cheese	549.7	11.7%	1.3%	1.6%	0.4%
Mozzarella	531.1	11.3%	3.9%	2.6%	2.1%
Colby Jack Blends	362.7	7.7%	4.6%	3.5%	3.3%
Cheddar Jack Hispanic Bl	323.3	6.9%	0.4%	-0.7%	0.2%
String Mozzarella	249.4	5.3%	2.6%	0.8%	0.3%
Parmesan	194.8	4.1%	4.3%	3.5%	2.4%
Monterey Jack	189.6	4.0%	1.1%	-1.4%	-3.2%
Cheddar Jack Blend	112.6	2.4%	-4.8%	-5.1%	-3.4%
Ricotta	100.4	2.1%	-1.7%	-3.4%	-1.9%
Queso Fresco	98.0	2.1%	11.2%	10.7%	7.8%
Swiss	97.0	2.1%	-0.2%	-1.4%	-5.5%
Fresh Mozzarella	95.6	2.0%	1.9%	1.6%	-1.8%
Provolone	93.0	2.0%	-2.2%	-3.2%	-4.0%
Variety Pack	69.4	1.5%	15.3%	13.9%	4.2%
Italian Blend	64.4	1.4%	-1.7%	-0.4%	-0.7%
Feta	57.7	1.2%	3.6%	1.0%	3.4%
<b>Total Processed</b>	<b>732.3</b>	<b>100.0%</b>	<b>-2.3%</b>	<b>-3.9%</b>	<b>-4.9%</b>
Cheese Product	471.9	64.4%	-1.6%	-2.9%	-3.3%
Pasteurized Cheese	157.9	21.6%	-4.0%	-6.0%	-10.3%
Cheese Food	53.6	7.3%	-5.4%	-5.8%	-5.8%
<b>Total Vegan</b>	<b>19.6</b>	<b>0.4%</b>	<b>-5.7%</b>	<b>-8.6%</b>	<b>-9.5%</b>
<b>Total Imitation</b>	<b>9.9</b>	<b>0.2%</b>	<b>-9.8%</b>	<b>-14.1%</b>	<b>-23.6%</b>

## Largest Cheese Varieties Pricing Trend

	-- Avg Price/Gal-- 52 Wks	Latest 2025YTD	Latest 4 Wks	-- % Price 52 Wks	Chg vs 2025YTD	Yago -- Latest
<b>Total Cheese</b>	<b>\$5.76</b>	<b>\$5.70</b>	<b>\$5.70</b>	<b>1.0%</b>	<b>2.0%</b>	<b>2.6%</b>
<b>Total Natural</b>	<b>\$5.72</b>	<b>\$5.71</b>	<b>\$5.70</b>	<b>0.6%</b>	<b>1.0%</b>	<b>1.0%</b>
Cheddar	\$5.38	\$5.39	\$5.31	0.5%	0.8%	0.4%
Cream Cheese	\$5.41	\$5.45	\$5.49	1.1%	-1.1%	-1.2%
Mozzarella	\$4.35	\$4.34	\$4.24	2.1%	2.7%	1.6%
Colby Jack Blends	\$5.03	\$5.05	\$4.97	-0.7%	0.2%	0.6%
Cheddar Jack Hispanic Bl	\$4.26	\$4.24	\$4.13	1.9%	2.3%	0.5%
String Mozzarella	\$5.24	\$5.32	\$5.40	2.8%	5.9%	8.5%
Parmesan	\$9.29	\$9.37	\$9.54	1.8%	2.8%	4.2%
Monterey Jack	\$5.21	\$5.22	\$5.14	-0.8%	0.4%	0.4%
Cheddar Jack Blend	\$3.49	\$3.44	\$3.35	1.9%	3.2%	1.4%
Ricotta	\$3.20	\$3.29	\$3.38	2.1%	4.2%	4.9%
Swiss	\$5.04	\$5.06	\$5.11	-0.1%	-0.6%	0.2%
Fresh Mozzarella	\$6.79	\$6.81	\$6.71	-2.5%	-1.5%	0.3%
Provolone	\$7.08	\$7.18	\$7.24	0.8%	1.4%	2.8%
Queso Fresco	\$6.38	\$6.33	\$6.17	-1.9%	-1.5%	-2.5%
Variety Pack	\$6.61	\$6.49	\$6.37	-1.0%	-1.5%	0.1%
Italian Blend	\$6.01	\$5.98	\$5.99	0.2%	-0.2%	0.6%
Feta	\$9.35	\$9.35	\$9.13	-0.2%	0.3%	-3.1%
<b>Total Processed</b>	<b>\$4.97</b>	<b>\$4.95</b>	<b>\$4.84</b>	<b>0.2%</b>	<b>0.2%</b>	<b>0.0%</b>
Cheese Product	\$4.41	\$4.39	\$4.27	-0.6%	-0.4%	-0.6%
Pasteurized Cheese	\$5.67	\$5.67	\$5.66	1.3%	1.9%	2.5%
Cheese Food	\$5.30	\$5.26	\$5.21	0.4%	-0.9%	-1.5%
<b>Total Vegan</b>	<b>\$10.57</b>	<b>\$10.57</b>	<b>\$10.58</b>	<b>-3.3%</b>	<b>-3.7%</b>	<b>-1.4%</b>
<b>Total Imitation</b>	<b>\$2.75</b>	<b>\$2.77</b>	<b>\$2.77</b>	<b>0.8%</b>	<b>2.1%</b>	<b>3.2%</b>

## Volume Trends by Top Cheese Forms

	Volume % Chg vs Yago 52 Wks	2025YTD	4 Wks	Volume Share 52 Wks
<b>Total Cheese</b>	<b>2.0%</b>	<b>1.9%</b>	<b>1.5%</b>	<b>100.0%</b>
Sliced	1.2%	-0.5%	-2.1%	20.7%
Chunk	5.8%	5.3%	3.8%	19.2%
Shreds, Reg	0.4%	0.1%	0.4%	17.7%
Shred, Fine	-0.1%	-0.1%	0.5%	12.1%
Spread	0.7%	1.4%	2.9%	5.6%
String	1.3%	-1.0%	-2.0%	4.6%
Round	12.5%	13.7%	12.3%	2.8%
Loaf	1.6%	5.6%	8.7%	2.4%
Grated	0.3%	-0.4%	-0.4%	2.0%
Tab	-1.7%	-3.4%	-2.0%	1.8%
Part Round	3.9%	2.2%	5.8%	1.2%
Stick	1.9%	1.4%	0.2%	1.1%
Crumbled	1.3%	-0.2%	2.1%	1.0%




## Volume Share and Trend by Outlet

	% Volume Chg vs Yago	Latest 52 Wks	2024	4 Wks
<b>100.0% Volume Share</b>	<b>TOTAL U.S.</b>	<b>2.0%</b>	<b>1.9%</b>	<b>1.5%</b>
53.7%	Grocery	0.2%	0.1%	-1.0%
45.8%	Supercenters, Club, Other	3.8%	3.0%	3.0%
0.5%	C-Store	62.5%	152.3%	200.5%



## E-Commerce Sales Trend



## New Product Spotlight: a sampling of new products



**USA (Jul 2025)**  
**Organic Valley Stringles**  
Part skim mozzarella  
cheese strings made with  
organic milk. 7g protein.



**USA (Jun 2025)**  
**Target Good & Gather**  
Hot honey flavored  
mozzarella with  
cheddar.



**USA, imported from Italy**  
**(Jun 2025)**  
**Aldi Sud Baked ricotta**  
dessert cheese with  
chocolate chips or lemon.



**USA (Jun 2025)**  
**Crystal Farms Seasoned**  
White cheddar cheese with  
ranch, dill pickle, and garlic &  
herb seasoning. Good source of  
protein callout.