

# TOTAL DAIRY RETAIL SNAPSHOT

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

For internal use only. Not to be shared with external parties



### TOTAL DAIRY SEES GROWTH IN DOLLAR AND UNIT SALES

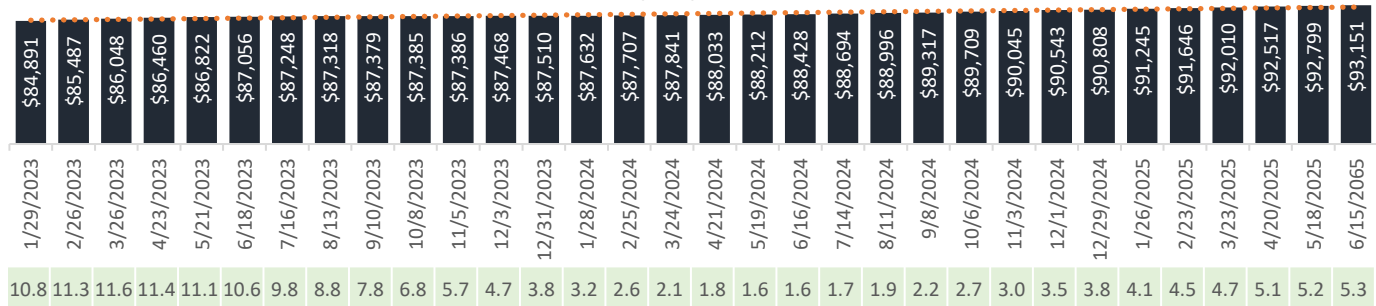
In the past four weeks, total retail dairy category dollar sales rose by 5.0% and unit sales increased by 3.0% compared to the same period last year.

- Most dairy categories have maintained or increased household penetration over the past year. Cottage cheese and dairy creamer each saw penetration gains of more than 2 percentage points.
- Cheese continues to perform well, with a 1.5% increase in volume over the past four weeks and a 1.9% rise year-to-date in 2025. Natural cheeses, especially chunk varieties, are leading in growth.
- Milk volume is slightly down, falling 0.3% year-to-date in 2025 and over the past four weeks. However, whole milk, lactose-free, and A2 milk types are showing strong absolute volume growth in both timeframes.
- Another high protein category, cottage cheese, is also maintain its strong year-over-year volume increases since it went viral in the spring of 2023.

- Yogurt remains a standout, with a 9% volume increase in the past four weeks versus the previous year. The growing demand for protein has driven this surge, with strong double-digit growth in Greek and Icelandic yogurts as well as other protein-rich varieties like Ratio and Yoplait Protein.
- Butter/butter blend volume has increased 3.6% year-to-date in 2025 and 2% in the latest four weeks. Growth is noted across all household lifestyles with the highest gains over the past 52 weeks in young families with children <12.

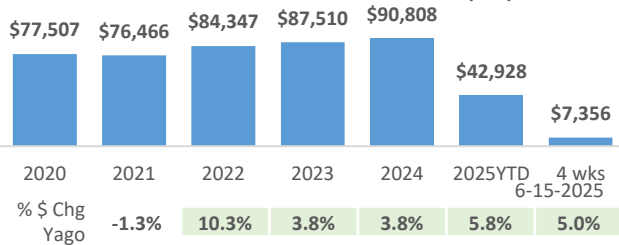
## Rolling 52 Weeks Dollar Trend

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



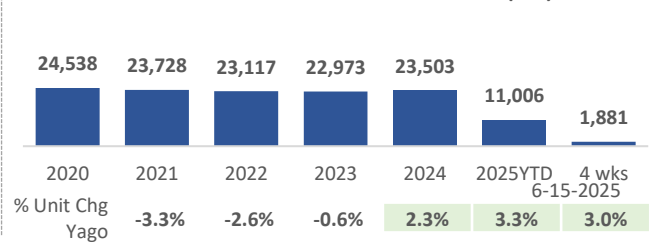
## Calendar Year Dollar Trend

TOTAL DAIRY RETAIL DOLLARS (Mil)



## Calendar Year Unit Trend

TOTAL NUMBER DAIRY UNITS SOLD (Mil)



## Purchase Dynamics, 52 Weeks ending 6-15-2025

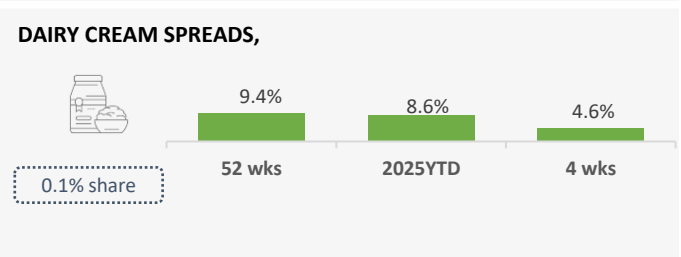
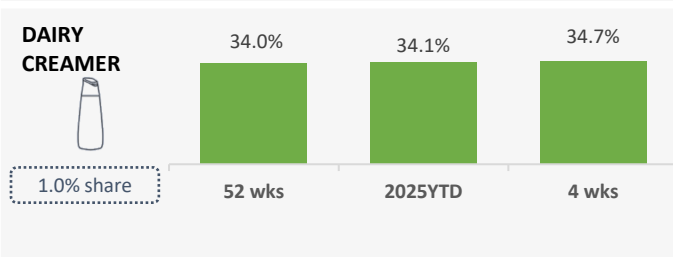
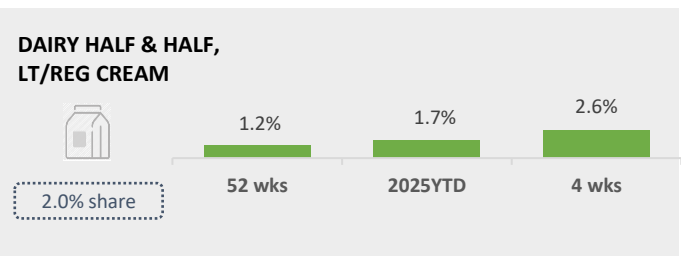
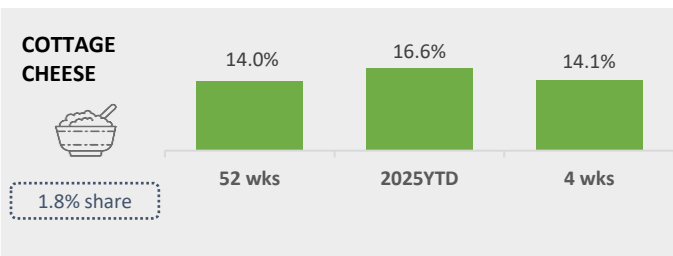
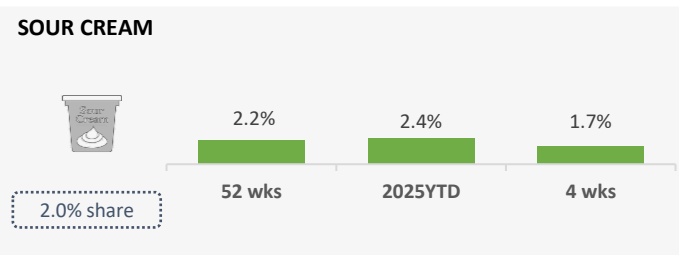
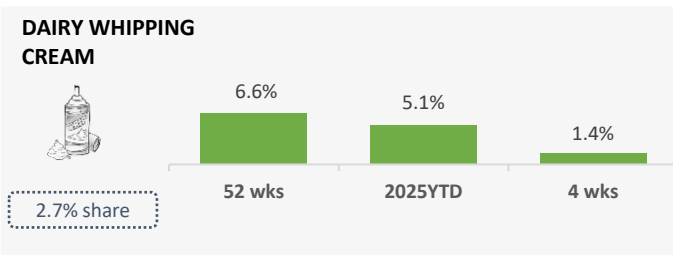
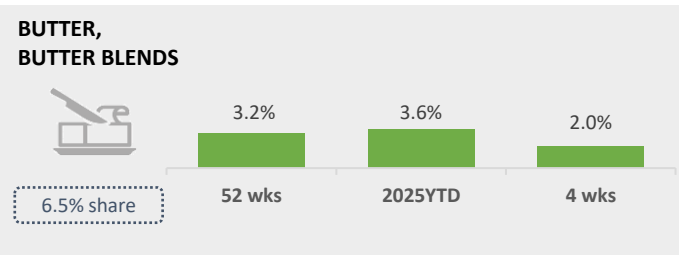
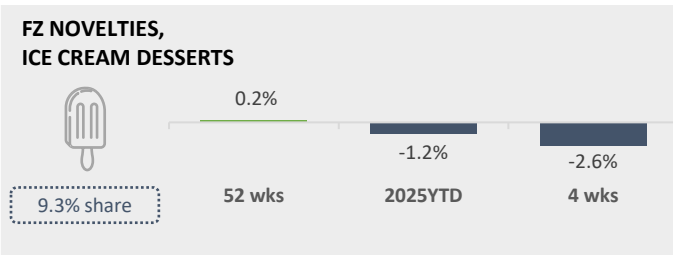
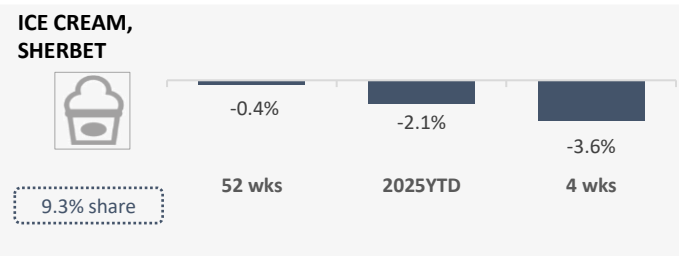
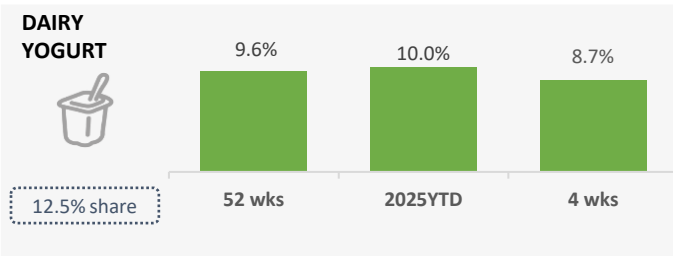
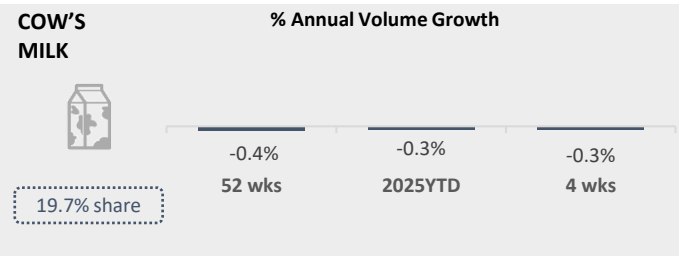
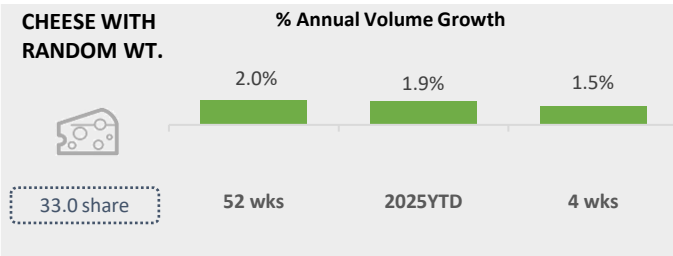
Product	% Households Buy	Pt Chg vs Yago	Volume per Buyer	Vol/Buyer % Chg vs Yago	# Trips per Buyer	% Chg Trips/Buyer	Volume per Trip	% Chg Vol/Trip
Cheese*	96.6%	0.5	42.4 lbs	2.6	29.3	5.2	1.4	-1.4
Cow's Milk	91.6%	-0.1	29.7 gal	1.2	30.3	2.8	1.0	-1.1
Dairy Yogurt	82.4%	1.0	40.4 pints	8.6	16.7	9.7	2.4	0.9
Ice Cream, Sherbet	81.9%	-0.5	41.8 pints	0.6	10.3	1.5	4.1	-0.9
Fz. Novelties	77.8%	-0.8	22.7 16 oz pkg	1.7	9.7	0.7	2.4	0.5
Butter, Blends	77.7%	1.2	12.6 lbs	2.4	8.0	7.0	1.6	-2.1
Sour Cream	72.1%	0.0	8.2 pints	3.2	7.0	3.9	1.2	-0.1
Dairy Whipping Cream	61.5%	0.8	9.0 pints	6.0	6.1	6.7	1.5	1.4
Cottage Cheese	47.6%	2.7	11.8 pints	7.8	6.9	14.0	1.7	1.0
Dairy H+H, Lt/Reg Cream	33.0%	-0.6	22.4 pints	3.4	8.8	2.2	2.6	-0.1
Dairy Creamer	17.4%	2.2	15.1 pints	17.3	6.3	32.7	2.4	1.9
Dairy Cream Spreads	3.2%	0.3	3.2 pints	-3.3	3.1	12.7	1.0	-3.2

Note: Cheese excludes vegan, imitation, and goat & sheep varieties

# TOTAL DAIRY RETAIL SNAPSHOT

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

## Product Volume % 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 6-15-2025

## Retail Pricing

Average Price per Vol. Equivalent

% Price Change vs. Year Ago

Category	52 Wks	2025YTD	4 wks
Cheese incl random wt (prc/lb)*	\$5.62	\$5.65	\$5.65
Cow's Milk (prc/gal)	\$5.24	\$5.22	\$5.19
Wht Conventional Gallon-size	\$3.99	\$3.97	\$3.88
Dairy Yogurt (pint)	\$2.81	\$2.84	\$2.89
Ice Cream, Sherbet (prc/pint)	\$1.96	\$2.00	\$1.95
Fz Novelties ( prc 16 oz pkg)	\$3.78	\$3.86	\$3.66
Butter/Blends (lb)	\$4.90	\$4.94	\$4.91
Dairy Whip Cream, liquid/aerosol (prc/pint)	\$3.62	\$3.63	\$3.73
Sour Cream (prc/pint)	\$2.57	\$2.59	\$2.59
Dairy Half & Half, Lt/Reg Cream (prc/pint)	\$1.81	\$1.80	\$1.80
Cottage Cheese (prc/pint)	\$2.67	\$2.70	\$2.73
Dairy Creamer (prc/pint)	\$2.93	\$2.95	\$3.01
Dairy Cream Spreads – (prc/pint)	\$4.18	\$4.18	\$4.07

\*excludes vegan and imitation

Category	52 Wks	2025YTD	4 wks
Cheese incl random wt (prc/lb)*	1.0%	2.1%	2.7%
Cow's Milk (prc/gal)	4.5%	4.6%	3.7%
Wht Conventional Gallon-size	3.8%	3.3%	0.9%
Dairy Yogurt (pint)	2.7%	3.6%	4.5%
Ice Cream, Sherbet (prc/pint)	1.7%	2.8%	3.7%
Fz Novelties ( prc 16 oz pkg)	1.4%	3.0%	3.7%
Butter/Blends (lb)	6.4%	4.2%	2.3%
Dairy Whip Cream, liquid/aerosol (prc/pint)	3.2%	2.9%	4.1%
Sour Cream (prc/pint)	2.6%	2.4%	2.4%
Dairy Half & Half, Lt/Reg Cream (prc/pint)	4.3%	2.9%	1.8%
Cottage Cheese (prc/pint)	5.6%	5.9%	5.5%
Dairy Creamer (prc/pint)	3.2%	2.7%	3.4%
Dairy Cream Spreads – (prc/pint)	-0.9%	-1.0%	-1.3%

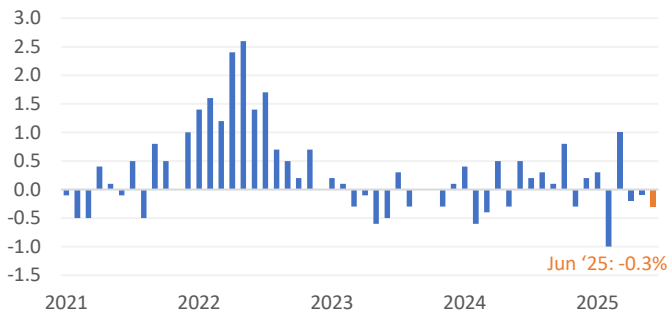


The CPI measures change in consumer prices over time based on a basket of goods.

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–Jun 2025  
seasonally adjusted



12 Month Inflation Rate, not seasonally adjusted

The overall (all items) 12-month inflation rate was 2.7% in June 2025 up from 2.4% in April. The at-home food index also rose. Dairy prices remain above last year at this time but have increased more modestly compared to the overall food at-home index..

	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%
Apr '25	2.3%	3.9%	2.0%
May '25	2.4%	3.8%	2.2%
Jun '25	2.7%	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%
Apr '25	1.6%	3.9%	2.1%	-2.8%	1.5%
May '25	1.7%	3.3%	2.8%	0.0%	1.9%
Jun '25	0.9%	2.1%	2.9%	-0.6%	-0.4%

## REAL Dairy vs. Alternatives Spotlight

52 WEEKS ENDING 6-15-2025 RETAIL VOLUME % CHANGE VS. YEAR AGO

■ Dairy ■ Non-Dairy Alternatives

	Dairy: 90% Vol share	Dairy: 99% Vol share	Dairy: 98% Vol share	Dairy: 99% Vol share	Dairy: 36% Vol share
	3,508.6	5,500.8	4,154.4	694.7	1,277.4
	373.0	28.4	74.7	6.4	2,295.0
Milk, gallons	-0.4%	+2.1%	+9.6%	+6.6%	+8.0%
Cheese, pounds	-6.0%	-6.3%	15.7%	+6.8%	0.0%
Dairy Yogurt, pints	-12.9M gal	+110.9M lbs	+362.8M pts	+43.2M pts	+94.6M pts
Whipping Cream	-23.6M gal	-1.9M lbs	+10.1M pts	+0.4M pts	flat
Cream/Creamer, pints					

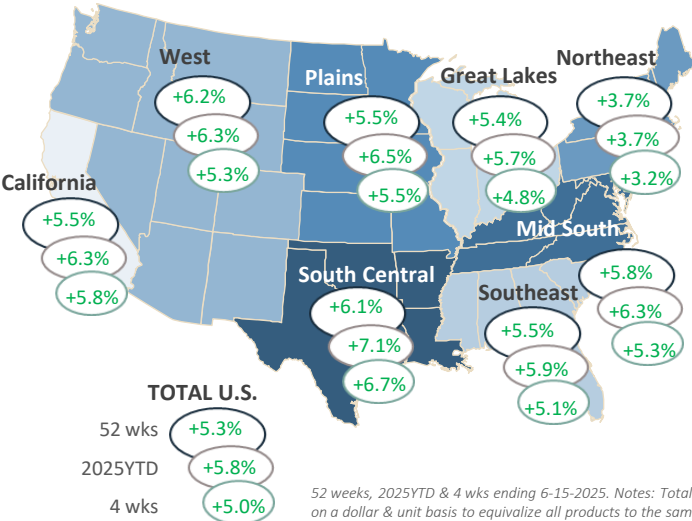
Dairy includes goat & sheep

# TOTAL DAIRY RETAIL SNAPSHOT

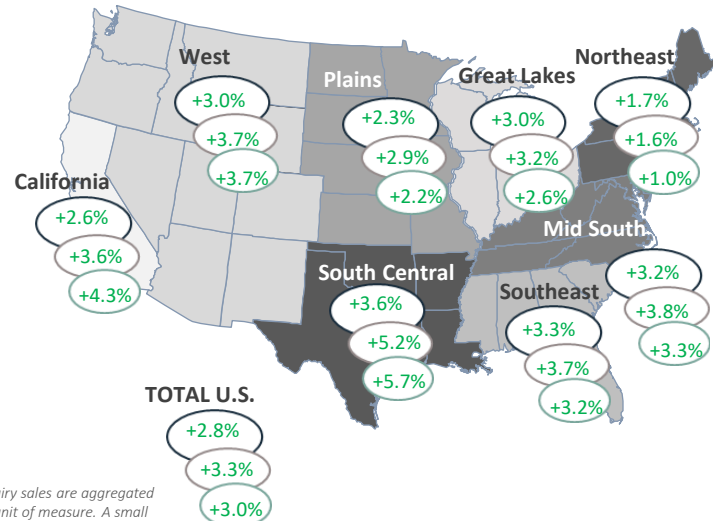
52 Weeks, 2025YTD and 4 Weeks Ending 6-15-2025

## 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 6-15-2025. 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

	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
TOTAL U.S.	2.0%	-0.4%	9.6%	-0.4%	0.2%	3.2%	6.6%	2.2%	1.2%	14.0%	34.0%	9.4%
California	2.3%	0.2%	9.3%	0.3%	0.6%	1.8%	1.3%	3.7%	1.7%	17.2%	32.4%	9.3%
Great Lakes	2.2%	-0.4%	10.4%	-0.8%	1.3%	2.4%	6.7%	2.1%	1.8%	10.2%	36.8%	30.9%
Mid-South	2.2%	-0.1%	10.4%	-0.6%	1.0%	3.3%	12.5%	2.3%	-0.9%	15.1%	31.3%	-1.5%
Northeast	0.3%	-0.9%	7.7%	-1.0%	-1.6%	2.7%	5.8%	0.9%	0.4%	15.3%	23.9%	7.7%
Plains	2.6%	-0.7%	9.8%	-0.9%	0.3%	3.2%	1.8%	1.8%	3.0%	9.3%	38.7%	11.6%
S. Central	2.5%	-0.9%	11.2%	-0.7%	-0.5%	5.6%	10.2%	2.0%	4.3%	16.7%	38.4%	11.8%
Southeast	2.6%	0.2%	9.4%	0.1%	-0.1%	3.4%	10.0%	1.9%	2.0%	18.3%	38.9%	11.7%
West	2.6%	-0.2%	9.7%	0.3%	1.0%	4.1%	3.9%	3.3%	0.9%	14.9%	36.7%	7.2%

## New Product Spotlight

A sampling of new dairy products launched recently



**USA (Jul '25)**  
**Enlightened** Creamy mint flavored frozen Greek yogurt bars with rich dark chocolate chips. 80 calories.

Source: Innova



**USA (Jun '25)**  
**Karoun Kefir** that contains 10 live and active Kefir cultures that support digestive health and overall well-being.



**USA (Jun '25)**  
**Laird Superfood** Dairy-free creamer with lion's mane and reishi mushroom extract for mental focus and mood boost.



**USA (Jul '25)**  
**First Street** Premium European-style salted butter with 82% milkfat. Made with Real California milk.



**USA, produced in Ireland (Jul '25)**  
**Kerrygold** Butter blend with cinnamon, brown sugar, and nutmeg.



**USA (Jul '25)**  
**Buji Buji** brown butter stick is a super premium hand-crafted butter that can elevate a dish or add a gourmet twist to dishes.



**USA (Jun '25)**  
**Ice Cream for Bears** Three ingredients: dairy, eggs, raw honey. Grass-fed dairy raised on regenerative farms.