

TOTAL U.S. CHEESE SNAPSHOT

52 Weeks, 2025YTD and 4 Weeks Ending 08-10-2025



CHEESE RETAIL VOLUME SLOWS IN THE LAST 4 WEEKS VS. LAST YEAR

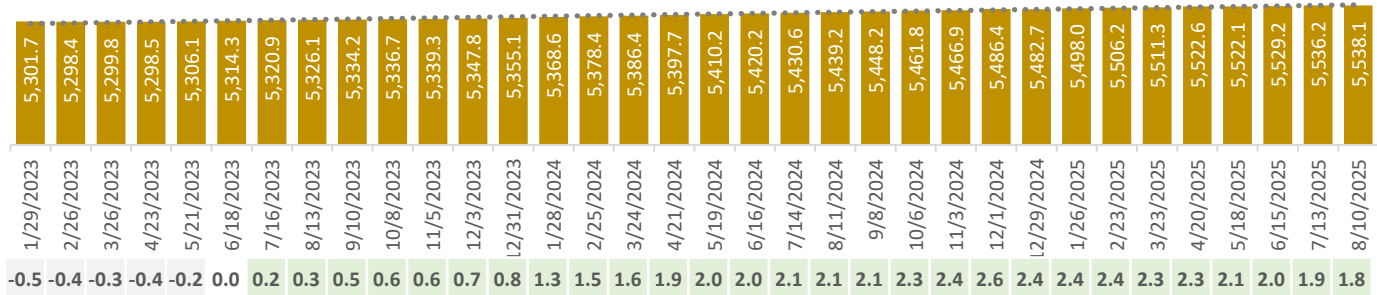
Cheese retail volume is up 1.7% year-to-date in 2025. While sales have remained positive in the last four weeks, growth has slowed to just 0.5% compared to last year. Volume has leveled off in the Great Lakes region and declined in the Northeast during this period, though year-to-date trends remain positive across all regions. Pricing has risen modestly, up 2% versus a year ago.

- Household penetration remains strong at 97% over the past 52 weeks, with purchase frequency increasing as consumers buy cheese more often.
- Growth is strongest outside of traditional grocery stores, as more shoppers purchase cheese from mass merchandisers, supercenters, and club stores. Traditional grocery, however, is showing a slight year-to-date decline, with a sharper slowdown in the last four weeks.
- Online sales of natural cheese continue to gain momentum, rising 19% in recent weeks.

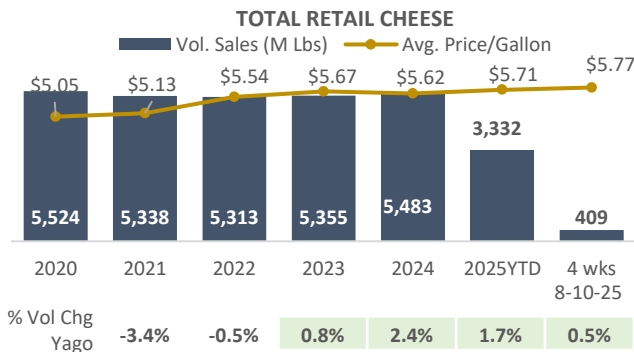
- Cheese remains a staple at home for kids, teens and adults, with the strongest product development among young adults ages 18-24. Convenient string and stick cheese formats are especially popular among kids and teens, making them an easy snack or school-friendly option. Chunk/cube/crumble formats of cheese are more developed among adults in comparison to kids and teens.

Rolling 52 Weeks Volume Trend

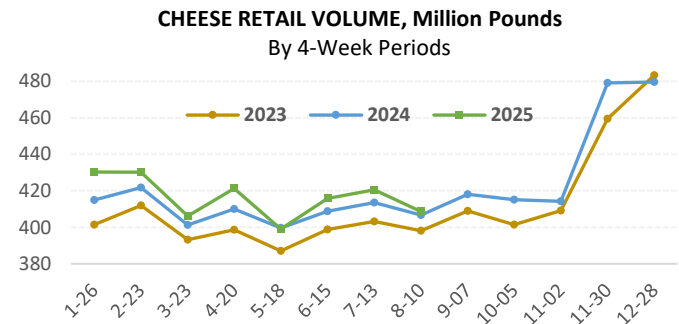
* Total cheese includes small segments of vegan and imitation



Calendar Year Volume and Price Trend



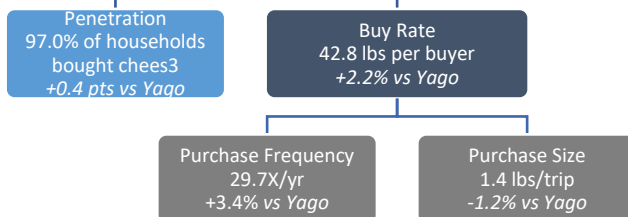
Quad-week Sales View



Purchase Dynamics

Note: Cheese includes small segments of vegan/imitation

How did buying behavior change over the last 52 wks?



Regional Volume Trend

% Chg vs Yago	Volume Index	Latest 52 Wks	2025YTD	Latest 4 Wks
TOTAL U.S.	100	1.8%	1.7%	0.5%
California	81	2.2%	2.2%	1.3%
Great Lakes	105	1.8%	1.5%	0.0%
Mid-South	105	1.9%	1.7%	0.1%
Northeast	96	-0.2%	-0.6%	-2.7%
Plains	120	2.5%	2.7%	2.1%
South Central	84	2.5%	3.0%	2.7%
Southeast	105	2.3%	1.9%	0.4%
West	114	2.6%	2.5%	2.1%

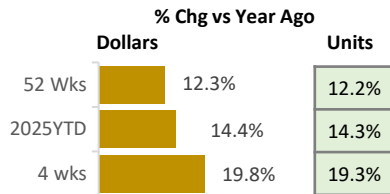
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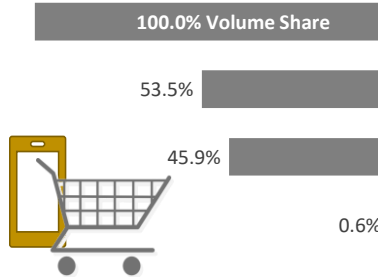
E-Commerce Sales Trend



**e-Commerce
Natural Cheese**
Latest 52 Wks Sales: \$2,245M
+\$245M vs Yago



Volume Share and Trend by Outlet



% Volume Chg vs Yago	Latest 52 Wks	2025YTD	4 Wks
TOTAL U.S.	1.8%	1.7%	0.5%
Grocery	-0.2%	-0.4%	-2.5%
Supercenters, Club, Other	3.5%	3.0%	2.2%
C-Store	106.1%	180.8%	251.2%

New Product Spotlight: a sampling of new products



USA (Sep 2025)

Beecher's Earthy, spicy cow's milk cheese with jerk spice. Beecher's contributes 1% of all sales to The Beecher's Foundation building a better food future for all through youth food education.



USA (Aug 2025)

Whitefeather Meats High-Temp Pepper Jack Cheese is a premium, shelf-stable cheese. Crafted to withstand cooking temperatures up to 400 degrees Fahrenheit, it maintains its shape and texture without melting, making it ideal for smoked or grilled meats.



USA (Aug 2025)

Athenos Whipped feta cheese dip and spread with mango jalapeno, cucumber dill, roasted red pepper.



GERMANY (Sep 2025)

Pickers by McCain Smoky cheese donuts. Melting mozzarella, coated in a crispy cornflake coating with a subtle smoky flavor, promises a unique taste experience.

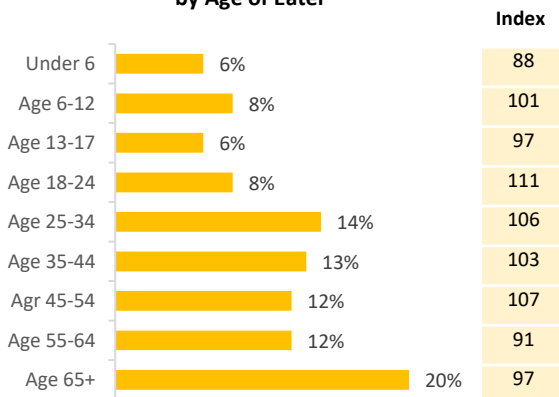
SWITZERLAND (Sep 2025)

Emmi Full-fat Swiss cheese made from raw milk. It is a feast for the palate and the eyes. Shaving the cheese into rosettes changes the structure of the cheese, allowing its aromatic, melt-in-the-mouth flavor to fully develop.

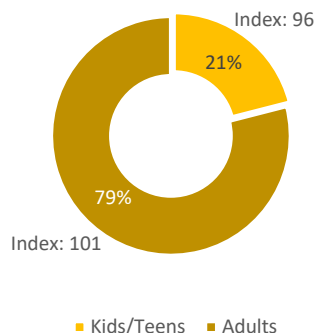
Cheese Consumption Facts

Source: National Eating Trends, Circa 12 mos., Aug '24-Jul '25

% of Total In-Home Cheese Eating by Age of Eater



Share of Cheese In-Home Eatings



	Kids/Teens	Adults
Cream	17%	83%
Cheddar	19%	81%
Mozzarella	27%	72%
Spreadable	8%	92%
Cube/Chunk/Crumble	13%	87%
String	39%	61%
Cheese sticks	42%	58%

