

# TOTAL U.S. CHEESE SNAPSHOT

52 Weeks, 2025YTD and 4 Weeks Ending 4-20-2025



## CHEESE RETAIL MARKET VOLUME GROWTH ACCELERATED IN THE LATEST 4 WEEKS

The retail cheese market experienced a 3% increase in volume during the four-week period ending April 20, 2025. This growth is stronger than compared to earlier 2025 periods, likely due in part to the timing of the Easter holiday. All regions are seeing a 1.5% to over 4% growth during this latest period compared to year ago.

**Natural cheeses** dominate the retail market, carrying 85% of volume. The three largest varieties are cheddar, cream and mozzarella with shares of 18%, 10% and 10%, respectively. All three are performing well in this latest period with cream cheese seeing the largest uptick of nearly 4% over the Easter holiday.

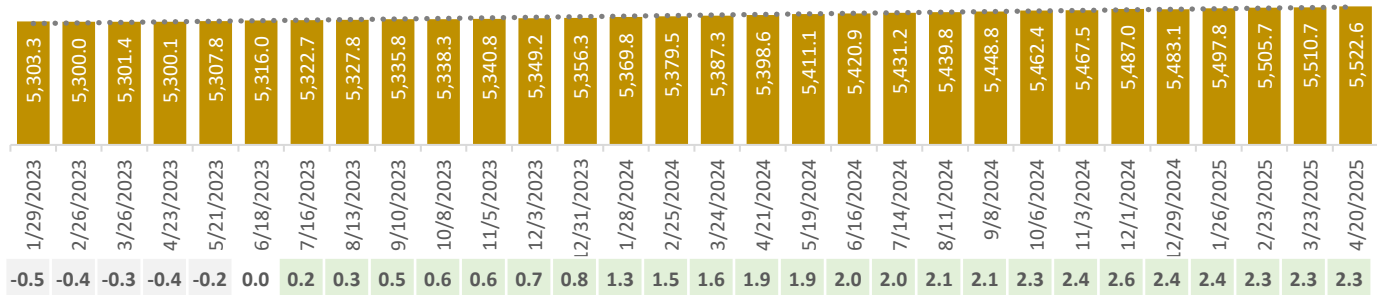
Standout performance continues for a small variety, **queso fresco**, with growth of 11% year-to-date and 9% in the last four weeks, delivering nearly four times the growth compared to its size.

**Processed cheeses** have faced a decline in volume over the past 52 weeks, with a sharper decrease in 2025 and the latest four weeks. Slices account for over 60% of processed cheese volume and are a key contributor to volume loss year-to-date and in the latest four weeks. Smaller segments of spreads and shreds have seen small growth year-to-date.

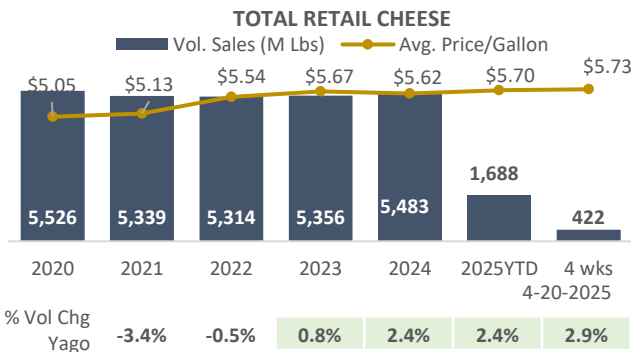
**Average cheese prices** are flat over the latest fifty-two weeks and have increased by 0.8% in the latest four weeks compared to year ago.

*\* Total cheese includes small segments of vegan and imitation*

## Rolling 52 Weeks Volume Trend

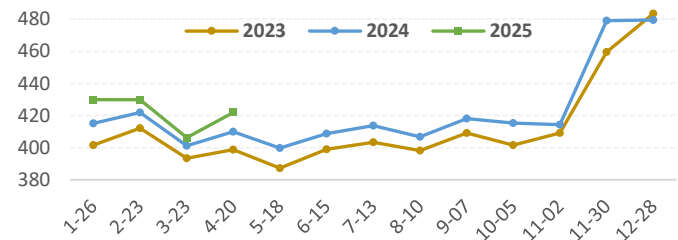


## Calendar Year Volume and Price Trend



## Quad-week Sales View

### CHEESE RETAIL VOLUME, Million Pounds By 4-Week Periods



## Purchase Dynamics

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  
+0.2 pts vs Yago

**Buy Rate**  
42.7 lbs per buyer  
+3.1% vs Yago

**Purchase Frequency**  
29.6X/yr  
+3.7% vs Yago

**Purchase Size**  
1.4 lbs/trip  
-0.6% vs Yago

## Regional Volume Trend

% Chg vs Yago	Volume Index	Latest 52 Wks	2025YTD	Latest 4 Wks
<b>TOTAL U.S.</b>	<b>100</b>	<b>2.3%</b>	<b>2.4%</b>	<b>2.9%</b>
California	80	2.4%	1.9%	1.7%
Great Lakes	106	2.6%	2.8%	3.9%
Mid-South	105	2.5%	2.8%	1.6%
Northeast	97	0.6%	0.6%	1.5%
Plains	120	3.0%	3.7%	4.1%
South Central	84	2.6%	2.9%	2.4%
Southeast	105	2.9%	2.6%	4.2%
West	114	2.7%	2.8%	4.0%

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## Largest Cheese Varieties Volume Trend

	52 Wk Volume (M gal)	52 Wk Vol Share	-- % Vol Chg vs Yago --	2025YTD	Latest 4 Wks
<b>Total Cheese</b>	<b>5,522.6</b>	<b>100.0%</b>	<b>2.3%</b>	<b>2.4%</b>	<b>2.9%</b>
<b>Total Natural</b>	<b>4,704.3</b>	<b>85.2%</b>	<b>2.6%</b>	<b>2.4%</b>	<b>2.6%</b>
Cheddar	988.3	17.9%	0.5%	1.6%	1.9%
Cream Cheese	549.3	9.9%	1.2%	2.2%	3.7%
Mozzarella	530.7	9.6%	5.0%	3.5%	2.9%
Colby Jack Blends	361.7	6.5%	5.1%	4.3%	4.4%
Cheddar Jack Hispanic Bl	324.2	5.9%	1.4%	-0.1%	-2.0%
String Mozzarella	249.3	4.5%	4.2%	1.0%	2.1%
Parmesan	194.5	3.5%	4.6%	4.8%	4.9%
Monterey Jack	191.0	3.5%	2.6%	0.1%	-1.8%
Cheddar Jack Blend	113.7	2.1%	-3.8%	-4.6%	-0.7%
Ricotta	101.0	1.8%	-1.4%	-3.0%	1.7%
Swiss	98.0	1.8%	0.7%	0.9%	0.8%
Queso Fresco	96.7	1.8%	10.7%	11.4%	8.8%
Fresh Mozzarella	95.9	1.7%	3.1%	3.8%	4.6%
Provolone	94.1	1.7%	-0.9%	-1.3%	-3.1%
Variety Pack	68.7	1.2%	15.5%	17.8%	12.6%
Italian Blend	64.6	1.2%	-1.2%	0.6%	3.1%
Feta	57.6	1.0%	3.8%	0.9%	2.0%
<b>Total Processed</b>	<b>738.8</b>	<b>13.4%</b>	<b>-1.3%</b>	<b>-3.1%</b>	<b>-5.2%</b>
Cheese Product	474.7	8.6%	-1.1%	-2.5%	-4.4%
Pasteurized Cheese	160.6	2.9%	-2.1%	-3.7%	-3.7%
Cheese Food	54.1	1.0%	-5.4%	-5.5%	-6.3%
<b>Total Vegan</b>	<b>19.9</b>	<b>0.4%</b>	<b>-4.5%</b>	<b>-7.7%</b>	<b>-6.5%</b>
<b>Total Imitation</b>	<b>10.3</b>	<b>0.2%</b>	<b>-7.0%</b>	<b>-9.5%</b>	<b>-16.9%</b>

## Largest Cheese Varieties Pricing Trend

	-- Avg Price/Gal--	Latest	-- % Price Chg vs Yago --	2025YTD	Latest 4 Wks
<b>Total Cheese</b>	<b>\$5.71</b>	<b>\$5.72</b>	<b>0.0%</b>	<b>1.0%</b>	<b>0.8%</b>
<b>Total Natural</b>	<b>\$5.37</b>	<b>\$5.41</b>	<b>-0.1%</b>	<b>0.7%</b>	<b>0.5%</b>
Cheddar	\$5.42	\$5.44	1.7%	-0.7%	-2.6%
Cream Cheese	\$4.34	\$4.37	1.0%	2.8%	2.3%
Mozzarella	\$5.03	\$5.06	-1.7%	-0.3%	0.1%
Colby Jack Blends	\$4.25	\$4.28	1.0%	2.8%	1.9%
Cheddar Jack Hispanic Bl	\$5.18	\$5.28	0.5%	4.8%	6.3%
String Mozzarella	\$9.25	\$9.31	1.4%	2.3%	3.5%
Parmesan	\$5.20	\$5.23	-1.9%	0.0%	0.9%
Monterey Jack	\$3.47	\$3.47	0.6%	3.7%	0.8%
Cheddar Jack Blend	\$3.18	\$3.26	1.5%	4.1%	2.4%
Ricotta	\$6.78	\$6.84	-3.0%	-2.0%	-1.4%
Swiss	\$5.05	\$5.07	0.3%	-0.4%	-0.2%
Fresh Mozzarella	\$7.06	\$7.15	0.0%	0.8%	-0.2%
Provolone	\$6.39	\$6.39	-2.4%	-1.5%	0.1%
Queso Fresco	\$6.62	\$6.51	-1.6%	-2.1%	-1.3%
Variety Pack	\$6.01	\$5.98	-0.2%	-0.4%	-1.8%
Italian Blend	\$9.37	\$9.41	0.2%	1.2%	0.8%
Feta	\$5.71	\$5.72	0.0%	1.0%	0.8%
<b>Total Processed</b>	<b>\$4.97</b>	<b>\$4.98</b>	<b>0.0%</b>	<b>0.5%</b>	<b>0.6%</b>
Cheese Product	\$4.42	\$4.43	-0.8%	-0.2%	-0.5%
Pasteurized Cheese	\$5.66	\$5.71	0.9%	2.4%	2.8%
Cheese Food	\$5.32	\$5.27	0.7%	-0.7%	-1.2%
<b>Total Vegan</b>	<b>\$10.60</b>	<b>\$10.53</b>	<b>-3.1%</b>	<b>-4.6%</b>	<b>-4.7%</b>
<b>Total Imitation</b>	<b>\$2.74</b>	<b>\$2.76</b>	<b>-0.3%</b>	<b>1.5%</b>	<b>2.3%</b>

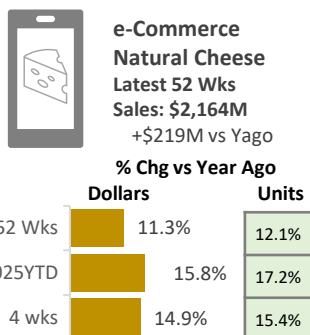
## Volume Trends by Top Cheese Forms

	Volume % Chg vs Yago	Volume Share
	52 Wks 2025YTD 4 Wks	52 Wks
<b>Total Cheese</b>	2.3% 2.4% 2.9%	100.0%
Sliced	2.3% 0.5% -0.6%	20.8%
Chunk	6.0% 6.2% 5.7%	19.1%
Shreds, Reg	1.2% 0.7% 1.4%	17.7%
Shred, Fine	0.3% 0.3% 0.1%	12.2%
Spread	0.5% 1.5% 2.7%	5.6%
String	3.1% -0.3% 0.2%	4.6%
Round	10.9% 14.2% 12.5%	2.7%
Loaf	0.0% 4.7% 5.1%	2.3%
Grated	0.5% 0.0% 0.5%	2.0%
Tub	-1.4% -3.1% 1.6%	1.8%
Part Round	5.5% 3.6% -5.9%	1.2%
Stick	2.0% 2.5% 1.8%	1.1%

## 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>2.3%</b>	<b>2.4%</b>	<b>2.9%</b>
53.9%	Grocery	0.7%	1.1%	2.2%
45.6%	Supercenters, Club, Other	4.1%	3.2%	2.2%
0.4%	C-Store	27.9%	118.1%	230.5%
0.05%	Drug	2.2%	37.4%	79.8%

## E-Commerce Sales Trend



## New Product Spotlight: a sampling of new products



**USA (Apr '25)**  
**Sartori**  
Sharp white cheddar cheese bites with a blend of Italian herbs, or with aged parmesan notes.



**GERMANY (Apr '25)**  
**Netto**  
Honey peppers antipasti cream with cream cheese and mild pickled bell peppers.



**DENMARK (produced in Germany)**  
**(Apr '25) Milbona**  
High protein white cheese. Cheese brings the extra portion of protein into every meal.



**UK (produced in Netherlands) (Apr '25)**  
**Lactalis Nestle Lindahl's**  
Protein gouda cheese. 7.6g protein per slice. Protein contributes to the maintenance of muscle mass.