

# TOTAL DAIRY RETAIL SNAPSHOT

52 Weeks, 2025YTD and 4 Weeks Ending 2-23-2025



## RETAIL DAIRY CONTINUES ON A POSITIVE GROWTH PATH

In 2025 year-to-date, we are observing a 3% increase in the overall sales of dairy products compared to the same timeframe last year. Consumers are buying more dairy, with notable volume growth across almost all categories. Milk, which has encountered historical challenges, shows a modest growth of 0.7% year-to-date, while cheese maintains steady sales, and products like yogurt, cottage cheese, and creamers are experiencing double-digit increases.

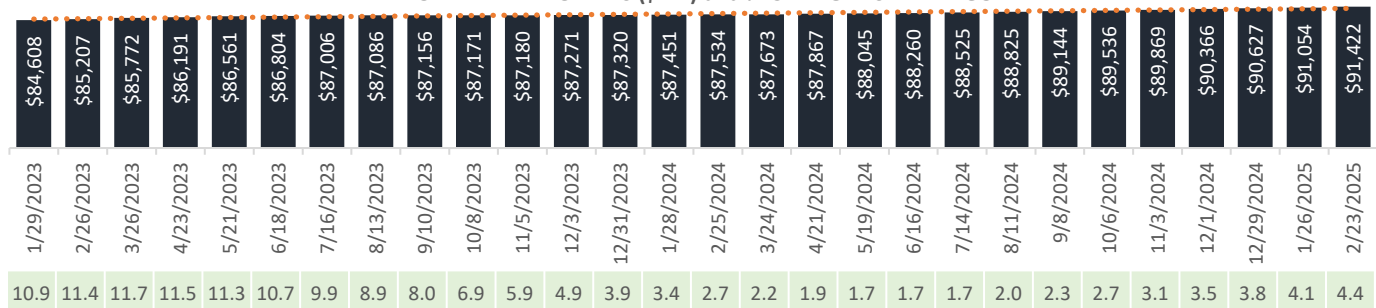
Dairy consumption is driven by the habits we formed during childhood, our affection for the products, nutrition, and personal relevance. Today's consumers are increasingly focused on their health and wellness, seeking tailored nutrition options ranging from fitness to personalized health solutions through various online platforms.

Dairy has successfully capitalized on innovation opportunities in the health & wellness space thanks to its robust nutritional profile and has excelled in providing products that delight the palate. High protein, lower sugar, lactose-free, and cultured attributes have helped to grow dairy volume.

High prices have prompted some consumers to shift towards cooking at home, contributing positively to dairy retail sales. A focus on value continues to be important, highlighting the perceived benefits that resonate with consumers' spending habits.

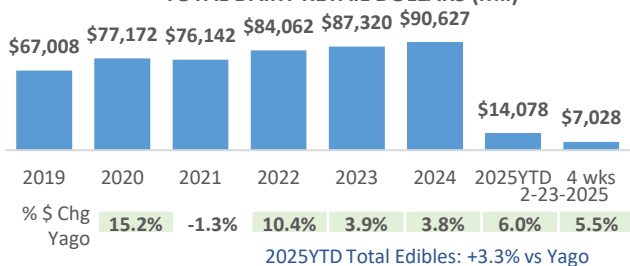
## Rolling 52 Weeks Dollar Trend

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



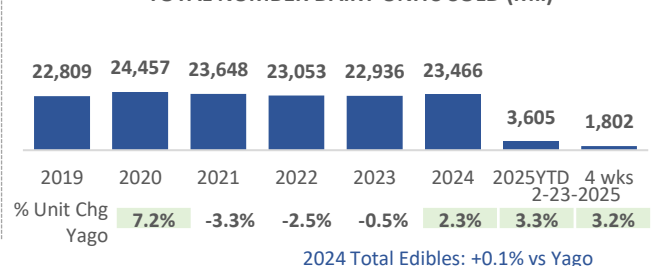
## Calendar Year Dollar Trend

TOTAL DAIRY RETAIL DOLLARS (Mil)



## Calendar Year Unit Trend

TOTAL NUMBER DAIRY UNITS SOLD (Mil)



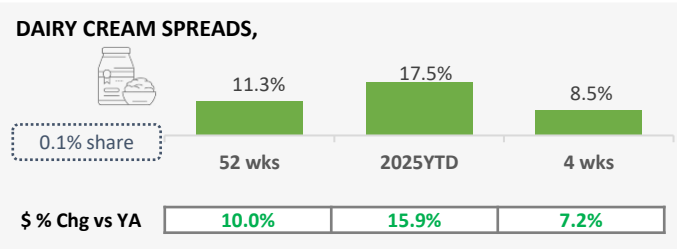
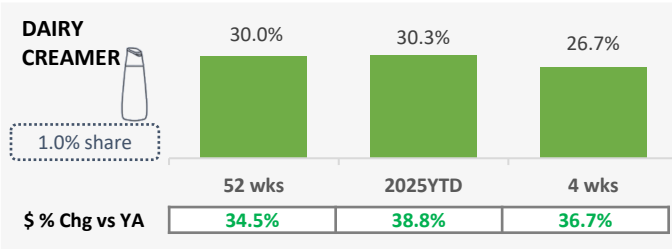
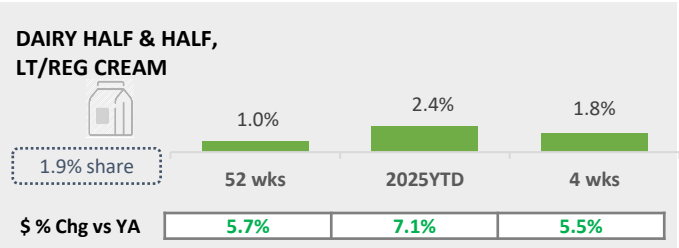
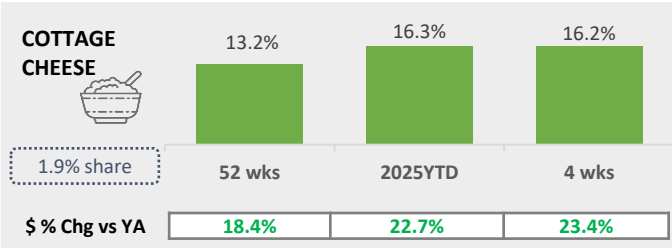
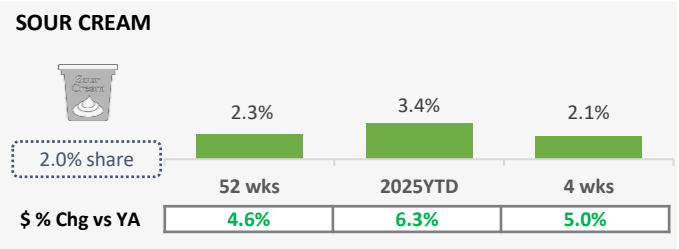
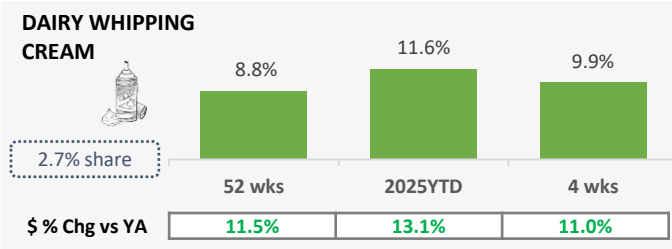
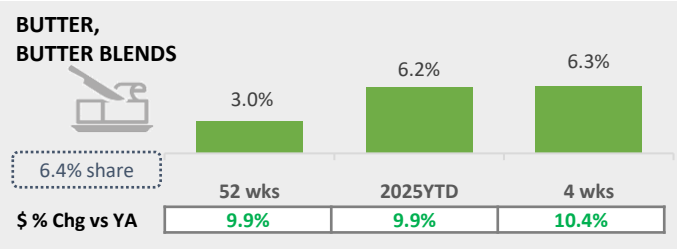
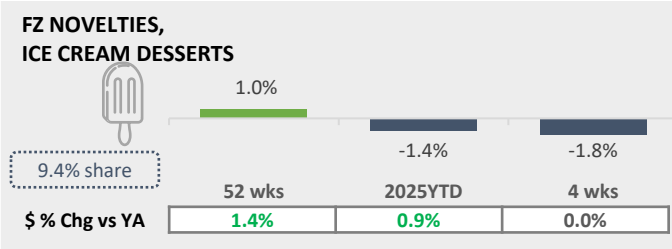
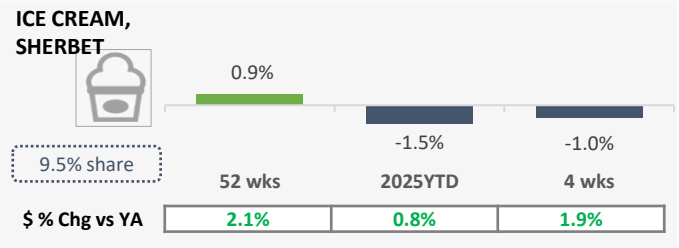
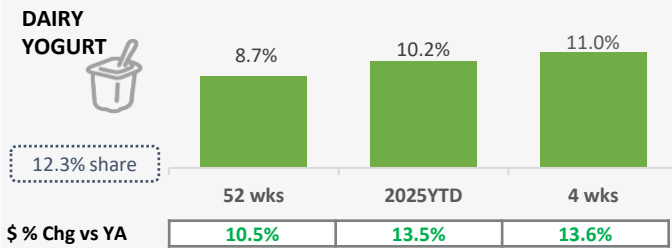
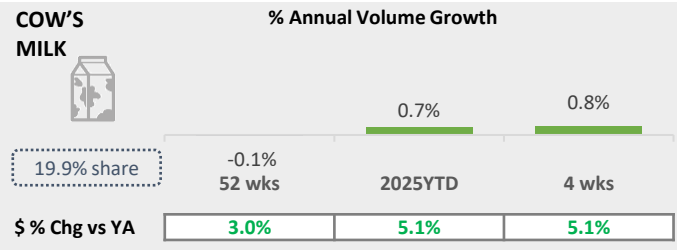
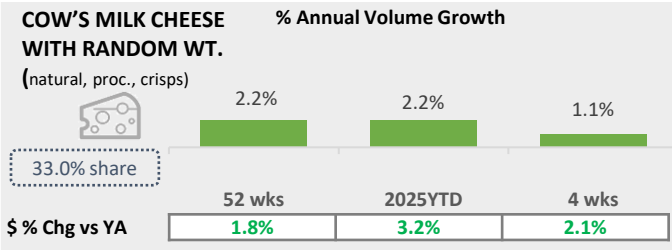
## Purchase Dynamics, 52 Weeks ending 2-23-2025

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 – Nat, proc, crisps	96.3%	0.1	42.19 lbs	3.4	28.9	4.4	1.5	-0.3
Cow's Milk	91.7%	0.1	29.6 gal	1.2	30.0	2.7	1.0	-0.9
Ice Cream, Sherbet	82.2%	-0.1	41.0 pints	1.3	10.3	1.6	4.1	0.1
Dairy Yogurt	82.2%	1.3	39.1 pints	7.3	16.3	9.2	2.4	0.4
Fz. Novelties	77.8%	-0.9	22.7 16 oz pkg	2.6	9.7	1.4	2.3	0.7
Butter, Blends	77.4%	0.9	12.6 lbs	3.1	8.0	7.0	1.6	-2.0
Sour Cream	72.1%	-0.2	8.1 pints	3.5	7.0	4.5	1.2	-0.6
Dairy Whipping Cream	61.4%	1.5	9.0 pints	7.2	6.1	8.7	1.5	1.7
Cottage Cheese	46.0%	2.1	11.6 pints	8.2	6.8	12.8	1.7	1.0
Dairy H+H, Lt/Reg Cream	33.1%	-0.1	22.4 pints	1.8	8.7	2.8	2.6	-0.6
Dairy Creamer	16.6%	2.0	14.5 pints	15.6	6.1	30.8	2.4	1.0
Dairy Cream Spreads	2.8%	-0.2	3.7 pints	21.0	3.5	3.0	1.1	8.6

# TOTAL DAIRY RETAIL SNAPSHOT

52 Weeks, 2025YTD and 4 Weeks Ending 2-23-2025

## Product Volume/Dollar % 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 2-23-2025

**Retail Pricing** Dairy prices have seen upticks across most categories.

Average Price per Vol. Equivalent

% Price Change vs. Year Ago

Category	52 Wks	2025YTD	4 wks
Cow's Milk Cheese incl random wt (prc/lb)	\$5.57	\$5.61	\$5.55
Cow's Milk (prc/gal)	\$5.17	\$5.19	\$5.19
Wht Conventional Gallon-size	\$3.57	\$3.59	\$3.57
Dairy Yogurt (pint)	\$2.79	\$2.80	\$2.80
Ice Cream, Sherbet (prc/pint)	\$1.95	\$2.03	\$2.03
Fz Novelties ( prc 16 oz pkg)	\$3.74	\$3.93	\$3.92
Butter/Blends (lb)	\$4.84	\$5.01	\$4.99
Dairy Whip Cream, liquid/aerosol (prc/pint)	\$3.58	\$3.51	\$3.55
Sour Cream (prc/pint)	\$2.55	\$2.59	\$2.57
Dairy Half & Half, Lt/Reg Cream (prc/pint)	\$1.79	\$1.81	\$1.80
Cottage Cheese (prc/pint)	\$2.62	\$2.67	\$2.69
Dairy Creamer (prc/pint)	\$2.93	\$3.00	\$3.04
Dairy Cream Spreads – (prc/pint)	\$4.20	\$4.29	\$4.27

Category	52 Wks	2025YTD	4 wks
Cow's Milk Cheese incl random wt (prc/lb)	-0.4%	1.0%	0.9%
Cow's Milk (prc/gal)	3.1%	4.4%	4.3%
Wht Conventional Gallon-size	2.2%	3.3%	3.2%
Dairy Yogurt (pint)	1.7%	3.0%	2.4%
Ice Cream, Sherbet (prc/pint)	1.1%	2.4%	2.9%
Fz Novelties ( prc 16 oz pkg)	0.5%	2.2%	1.8%
Butter/Blends (lb)	6.7%	3.5%	3.9%
Dairy Whip Cream, liquid/aerosol (prc/pint)	2.5%	1.3%	1.0%
Sour Cream (prc/pint)	2.3%	2.8%	2.8%
Dairy Half & Half, Lt/Reg Cream (prc/pint)	4.7%	4.6%	3.7%
Cottage Cheese (prc/pint)	4.7%	5.6%	6.2%
Dairy Creamer (prc/pint)	3.4%	6.6%	7.9%
Dairy Cream Spreads – (prc/pint)	-1.2%	-1.4%	-1.2%



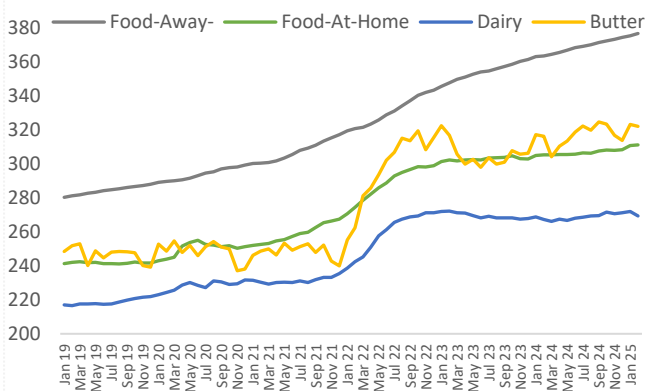
The CPI measures change in consumer prices over time based on a basket of goods.

Note: butter is not included in 'dairy'. It is considered part of fats & oils.

## Consumer Price Index

Consumer Price Index, % Increase Over Year Ago

Consumer Price Index (1982-84=100)



	All Items	Food Away-from-home	Food At-home	Dairy	Butter
Jan 24	3.1	5.1	1.2	-1.1	-1.6
Feb 24	3.2	4.5	1.0	-1.8	-0.2
Mar 24	3.5	4.2	1.2	-1.9	-0.5
Apr 24	3.4	4.1	1.1	-1.3	3.5
May 24	3.3	4.0	1.0	-1.0	3.5
Jun 24	3.0	4.1	1.1	-0.1	6.9
Jul 24	2.9	4.1	1.1	-0.2	6.1
Aug 24	2.5	4.0	0.9	0.4	6.7
Sep 24	2.4	3.9	1.3	0.5	7.8
Oct 24	2.6	3.8	1.1	1.3	5.1
Nov 24	2.7	3.6	1.6	1.2	3.6
Dec 24	2.9	3.6	1.8	1.3	2.5
Jan 25	3.0	3.4	1.9	1.2	1.9
Feb 25	2.8	3.7	1.9	0.8	1.9

## REAL Dairy vs. Alternatives Spotlight

Across milk, cheese, yogurt and whipping cream, REAL dairy is larger than non-dairy with more favorable performance.

52 WEEKS ENDING 2-23-2025 RETAIL VOLUME % CHANGE VS. YEAR AGO

■ Dairy ■ Non-Dairy Alternatives

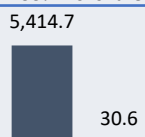
Dairy:  
90% Vol share



Milk, gallons

Vol % Chg	-0.1%	-5.7%
Vol Chg	-3.5M gal	-23.0M gal

Dairy:  
99% Vol share

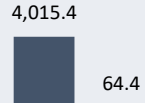


Cheese, pounds

Vol % Chg	+2.2%	-4.3%
Vol Chg	+117.7M lbs	-1.4M lbs

Dairy: natural + processed + crisps, excludes goat & sheep

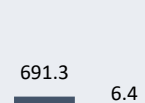
Dairy:  
98% Vol share



Yogurt, pints

Vol % Chg	+8.7%	-1.6%
Vol Chg	+319.8M pts	-1.1M pts

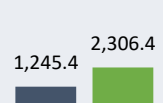
Dairy:  
99% Vol share



Whipping Cream

Vol % Chg	+8.8%	+8.1%
Vol Chg	+55.9M pts	+0.5M pts

Dairy:  
35% Vol share



Cream/Creamer, pints

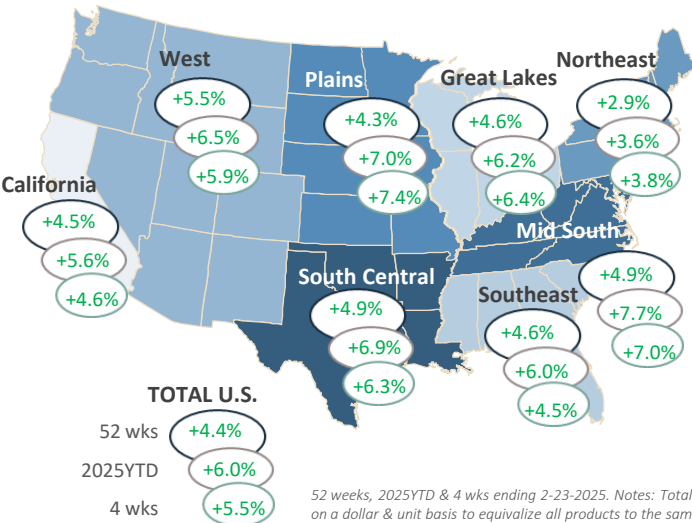
Vol % Chg	+6.7%	+0.9%
Vol Chg	+78.3M pts	+21.6M pts

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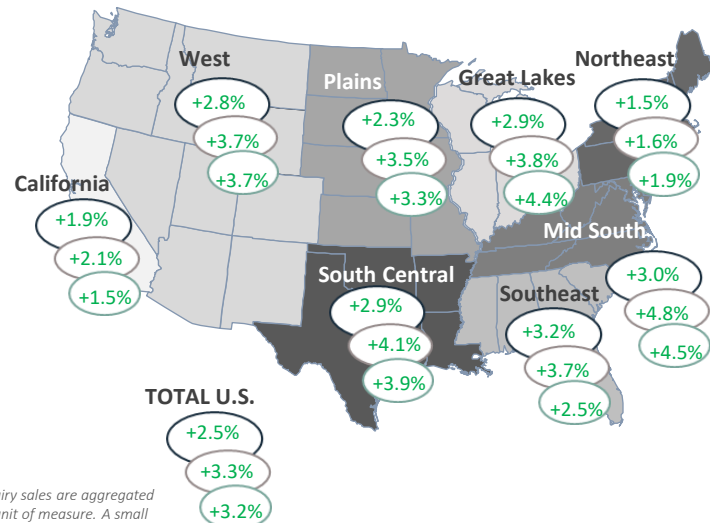
52 Weeks, 2025YTD and 4 Weeks Ending 2-23-2025

## 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 2-23-2025. 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

	Cow's Milk Cheese	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
<b>TOTAL U.S.</b>	2.2%	-0.1%	8.5%	0.9%	1.0%	3.0%	8.8%	2.3%	1.0%	13.2%	30.0%	11.3%
California	2.3%	0.4%	7.7%	2.6%	0.7%	-1.2%	6.5%	3.3%	1.7%	13.9%	28.8%	11.7%
Great Lakes	2.4%	-0.3%	8.8%	0.6%	4.1%	2.0%	8.9%	1.5%	2.0%	9.5%	29.2%	31.9%
Mid-South	2.6%	0.2%	9.4%	0.5%	1.7%	3.9%	13.3%	2.6%	-1.2%	14.6%	27.3%	0.6%
Northeast	0.5%	-1.1%	7.0%	0.1%	-0.9%	1.4%	6.5%	1.1%	-0.3%	15.0%	22.0%	11.7%
Plains	2.7%	-0.4%	8.7%	0.6%	1.1%	3.4%	5.8%	1.7%	3.3%	9.5%	34.1%	14.3%
S. Central	2.7%	-0.2%	9.5%	0.8%	0.9%	6.3%	10.6%	3.1%	4.0%	16.6%	34.2%	12.8%
Southeast	2.9%	0.6%	9.2%	1.4%	0.2%	4.5%	10.5%	2.1%	1.7%	16.5%	35.9%	10.6%
West	2.5%	0.3%	8.6%	1.5%	0.3%	5.1%	7.8%	3.1%	1.2%	14.1%	33.0%	10.9%

## New Product Spotlight

A sampling of new dairy products launched recently



**USA (Mar '25)**  
**Target**  
**Favorite Day**  
Zero sugar original whipped topping.



**USA (Mar '25)**  
**Alecs**  
Real strawberry ice cream with a hardened chocolate shell. Made with live probiotics and prebiotics. A2 dairy.



**USA (Mar '25)**  
**Clean Simple Eats**  
**Clear Protein** Made with grass-fed whey protein isolate. Clear focus. Clean energy.



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**Clean Simple Eats**  
**Clear Protein** Made with grass-fed whey protein isolate. Clear focus. Clean energy.



**USA (Feb '25)**  
**The Skinny Cow**  
No sugar added vanilla light ice cream set between two chocolate cookies. 4g protein.



**USA (Feb '25)**  
**Kaurina's** Rich & creamy Indian ice cream (Kulfi). Kulfi was a delicacy reserved for royalty in 17th century India. Now Kaurina's brings kulfi to the masses using their 100-year-old family recipe.