

# TOTAL U.S. CHEESE SNAPSHOT

52 Weeks, 2025YTD and 4 Weeks Ending 3-23-2025



## CHEESE RETAIL MARKET SHOWS CONTINUED GROWTH

The retail cheese market experienced a 1% increase in volume during the four-week period ending March 23, 2025. This growth is slower compared to the beginning of the year, likely due in part to the timing of the Easter holiday, as the latest four weeks do not encompass this period. Many cheese varieties typically see a seasonal boost during Easter, especially cream cheese and ricotta.

- **Natural cheeses** have led the growth trend this year, with mozzarella seeing the highest increase among popular varieties. Additionally, queso fresco and variety packs have also shown significant growth, with increases of 12% and 20%, respectively.

- **Processed cheeses** have faced a decline in volume over the past 52 weeks, with sharper decreases in 2025. Sliced cheeses are experiencing a notable drop, affecting both private labels and several leading brands.

- **Shredded cheese** varieties have sustained steady growth and gained market share over the past five years by offering consumers a convenient option for enhancing meals. Currently, 30% of retail cheese sales are from shredded forms.

- **Average cheese prices** have remained stable over the last 52 weeks but have risen by 1.8% in the latest four weeks. While some varieties, like cheddar, have not yet experienced price increases, others, including mozzarella and parmesan, have seen rises closer to 3%.

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

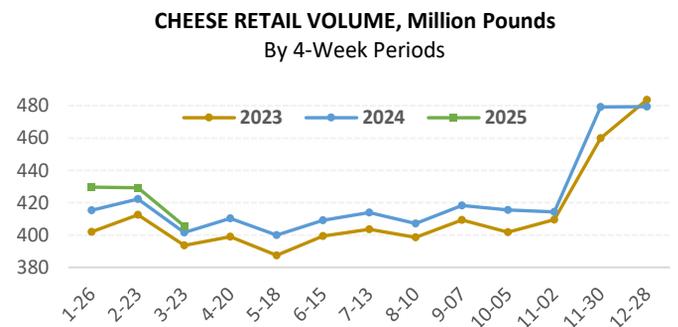
## Rolling 52 Weeks Volume Trend



## Calendar Year Volume and Price Trend

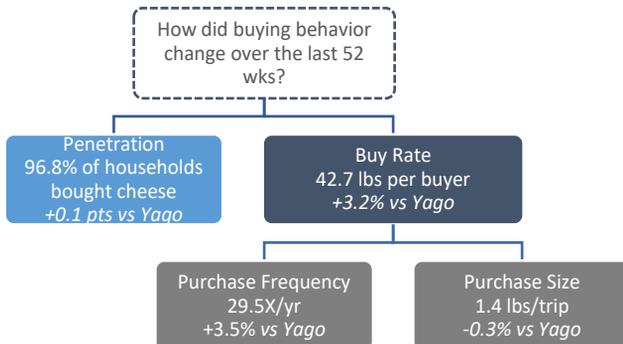


## Quad-week Sales View



## 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>	2.2%	2.1%	1.0%
California		80	2.5%	2.0%	3.7%
Great Lakes		105	2.5%	2.4%	1.3%
Mid-South		105	2.5%	3.0%	0.5%
Northeast		97	0.4%	-0.3%	-1.9%
Plains		120	2.9%	3.6%	2.5%
South Central		84	2.7%	2.9%	2.2%
Southeast		105	2.6%	2.0%	0.2%
West		113	2.7%	2.3%	2.3%

# TOTAL U.S. CHEESE SNAPSHOT

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## Cheese Varieties Volume Trend

	52 Wk Volume (M gal)	52 Wk Vol Share	-- % Vol Chg vs Yago --		
			52 Wks	2025YTD	Latest 4 Wks
<b>Total Cheese</b>	<b>5,511.6</b>	<b>100.0%</b>	<b>2.2%</b>	<b>2.1%</b>	<b>1.0%</b>
<b>Total Natural</b>	<b>4,695.4</b>	<b>85.2%</b>	<b>2.6%</b>	<b>2.2%</b>	<b>0.6%</b>
Cheddar	986.9	17.9%	0.3%	1.4%	0.1%
Cream Cheese	547.9	9.9%	0.9%	1.6%	-3.0%
Mozzarella	529.5	9.6%	5.3%	3.6%	2.4%
Colby Jack Blends	360.5	6.5%	5.1%	4.3%	2.7%
Cheddar Jack Hispanic Bl	324.6	5.9%	1.9%	0.5%	0.3%
String Mozzarella	248.9	4.5%	4.9%	0.7%	2.3%
Parmesan	193.7	3.5%	4.3%	4.6%	4.4%
Monterey Jack	191.3	3.5%	3.2%	0.7%	-0.8%
Cheddar Jack Blend	113.8	2.1%	-3.8%	-5.8%	-4.1%
Ricotta	100.8	1.8%	-1.8%	-4.6%	-9.0%
Swiss	98.3	1.8%	0.0%	0.5%	-0.8%
Queso Fresco	96.0	1.7%	10.6%	12.3%	8.7%
Fresh Mozzarella	95.6	1.7%	3.1%	3.4%	3.8%
Provolone	94.6	1.7%	-0.7%	-1.1%	-2.2%
Variety Pack	68.2	1.2%	14.9%	19.7%	14.7%
Italian Blend	64.4	1.2%	-1.7%	-0.4%	-0.3%
Feta	57.4	1.0%	3.8%	-0.8%	-3.3%
<b>Total Processed</b>	<b>743.0</b>	<b>13.5%</b>	<b>-0.8%</b>	<b>-2.7%</b>	<b>-4.5%</b>
Cheese Product	476.6	8.6%	-0.8%	-2.0%	-4.1%
Pasteurized Cheese	161.9	2.9%	-1.9%	-4.5%	-4.8%
Cheese Food	54.4	1.0%	-5.0%	-5.3%	-5.8%
<b>Total Vegan</b>	<b>20.0</b>	<b>0.4%</b>	<b>-4.1%</b>	<b>-8.1%</b>	<b>-5.6%</b>
<b>Total Imitation</b>	<b>10.5</b>	<b>0.2%</b>	<b>-5.9%</b>	<b>-7.0%</b>	<b>-11.9%</b>

## Cheese Varieties Pricing Trend

	-- Avg Price/Gal--			-- % Price Chg vs Yago --		
	52 Wks	2025YTD	Latest 4 Wks	52 Wks	2025YTD	Latest 4 Wks
<b>Total Cheese</b>	<b>\$5.64</b>	<b>\$5.69</b>	<b>\$5.73</b>	<b>-0.1%</b>	<b>1.4%</b>	<b>1.8%</b>
<b>Total Natural</b>	<b>\$5.70</b>	<b>\$5.74</b>	<b>\$5.72</b>	<b>-0.2%</b>	<b>1.0%</b>	<b>0.7%</b>
Cheddar	\$5.37	\$5.43	\$5.42	-0.2%	0.8%	0.0%
Cream Cheese	\$5.43	\$5.49	\$5.50	2.0%	0.0%	0.3%
Mozzarella	\$4.33	\$4.40	\$4.34	0.5%	3.0%	2.6%
Colby Jack Blends	\$5.03	\$5.07	\$5.05	-2.1%	-0.4%	-1.0%
Cheddar Jack Hispanic Bl	\$4.24	\$4.30	\$4.22	0.5%	3.0%	1.6%
String Mozzarella	\$5.15	\$5.25	\$5.25	-0.4%	4.3%	4.5%
Parmesan	\$9.22	\$9.35	\$9.38	1.2%	1.9%	2.8%
Monterey Jack	\$5.20	\$5.24	\$5.22	-2.3%	-0.3%	-0.3%
Cheddar Jack Blend	\$3.47	\$3.47	\$3.43	0.0%	4.6%	1.2%
Ricotta	\$3.18	\$3.31	\$3.31	1.4%	4.7%	6.4%
Swiss	\$6.80	\$6.85	\$6.89	-3.0%	-2.3%	-1.4%
Fresh Mozzarella	\$5.05	\$5.07	\$5.06	0.2%	-0.5%	0.1%
Provolone	\$7.06	\$7.16	\$7.11	-0.2%	1.1%	0.2%
Queso Fresco	\$6.40	\$6.39	\$6.37	-2.6%	-2.0%	-1.9%
Variety Pack	\$6.62	\$6.50	\$6.46	-1.7%	-2.4%	-2.2%
Italian Blend	\$6.02	\$6.01	\$5.96	0.0%	0.1%	-0.7%
Feta	\$9.38	\$9.45	\$9.56	0.2%	2.1%	2.7%
<b>Total Processed</b>	<b>\$4.97</b>	<b>\$4.97</b>	<b>\$5.01</b>	<b>-0.2%</b>	<b>0.4%</b>	<b>0.0%</b>
Cheese Product	\$4.42	\$4.43	\$4.43	-1.1%	-0.2%	-0.8%
Pasteurized Cheese	\$5.66	\$5.71	\$5.73	0.5%	2.0%	2.1%
Cheese Food	\$5.32	\$5.27	\$5.24	0.8%	-0.5%	-0.9%
<b>Total Vegan</b>	<b>\$10.64</b>	<b>\$10.51</b>	<b>\$10.51</b>	<b>-2.6%</b>	<b>-4.6%</b>	<b>-5.4%</b>
<b>Total Imitation</b>	<b>\$2.74</b>	<b>\$2.76</b>	<b>\$2.77</b>	<b>-0.8%</b>	<b>1.3%</b>	<b>1.9%</b>

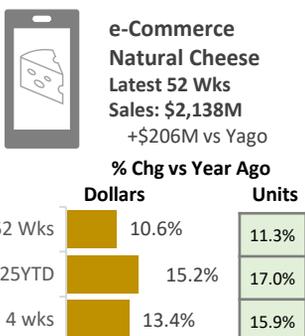
## Volume Trends by Top Cheese Forms

	Volume % Chg vs Yago			Volume Share 52 Wks
	52 Wks	2025YTD	4 Wks	
<b>Total Cheese</b>	<b>2.2%</b>	<b>2.1%</b>	<b>1.0%</b>	100.0%
Sliced	2.7%	0.8%	-0.5%	20.9%
Chunk	5.8%	6.1%	1.6%	19.1%
Shreds, Reg	1.3%	0.4%	-0.9%	17.8%
Shred, Fine	0.4%	0.3%	0.7%	12.2%
Spread	0.4%	1.1%	-1.2%	5.6%
String	3.9%	-0.5%	0.9%	4.6%
Round	10.9%	14.9%	13.0%	2.7%
Loaf	-0.6%	4.5%	5.7%	2.3%
Grated	0.4%	-0.3%	-1.6%	2.0%
Tub	-1.8%	-4.7%	-9.0%	1.8%
Part Round	7.6%	7.0%	4.2%	1.2%

## Volume Share and Trend by Outlet

	% Volume Chg vs Yago	Latest 52 Wks	2024	4 Wks
<b>TOTAL U.S.</b>	2.2%	2.1%	1.0%	
Grocery	0.5%	0.6%	-1.1%	
Supercenters, Club, Other	4.3%	3.4%	2.4%	
C-Store	10.5%	78.2%	173.0%	
Drug	-4.3%	23.2%	59.9%	

## E-Commerce Sales Trend



## New Product Spotlight: a sampling of new products

**USA (Apr '25)**  
 Nettle Meadow Fig & honey combined goat & cow's milk fresh cheese.

**USA (Apr '25)**  
 Lawry's Parmesan cheese and seasoning for mac & cheese. Ambient shelving.

**USA (Mar '25)**  
 Appetito's Frozen breaded cheese curds made with Wisconsin cheese.

**GERMANY (Mar '25)**  
 Baackes And Heimes Bunny-shaped mild gouda slices.