

# TOTAL U.S. CHEESE SNAPSHOT

52 Weeks, Year-to-date, and 4 Weeks Ending 2-22-2026



## 2026YTD RETAIL CHEESE SHOWS UNDERLYING STABILITY DESPITE RECENT VOLATILITY

Retail cheese sales volume is up modestly (+0.8% L52 Wks; +1.1% YTD), despite a short-term four-week decline (-1.7%), driven by normalization after a weather-driven spike in late January. Short-term product declines should be interpreted cautiously.

**Growth is concentrated in convenience and protein-forward formats.** String/stick and chunk cheeses are outperforming, supported by snacking and protein demand, while slices lag. Smaller deli grab-and-go formats are gaining momentum with strong recent growth.

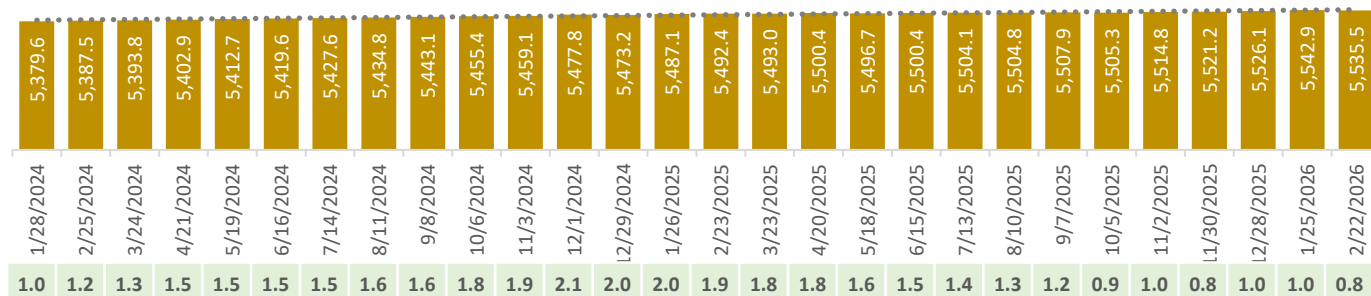
**Core staples continue to anchor the retail cheese category.** Cheddar, mozzarella and cream cheese represent nearly half of total volume. Mozzarella remains the key growth driver, with absolute growth driven by chunk and string/stick, while cheddar is slightly declining and cream cheese is stable.

**Hispanic cheeses are an emerging segment**, adding incremental upside. In total, Hispanic cheese are nearing 4% of volume, and are expanding rapidly across regions, signaling continued diversification of cheese demand. momentum across the country. While Hispanic cheeses are most developed in California and the South-Central region (9% and 8% of overall cheese volume respectively), all regions and markets are seeing gains.

## Rolling 52 Weeks Volume Trend

\* Total cheese includes small segments of vegan and imitation

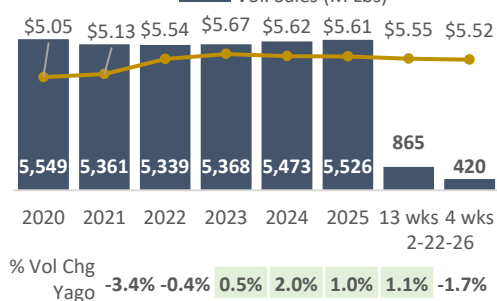
### RETAIL CHEESE VOLUME (M Lbs) and % CHANGE VS YEAR AGO



## Calendar Year Volume and Price Trend

### TOTAL RETAIL CHEESE

Vol. Sales (M Lbs)



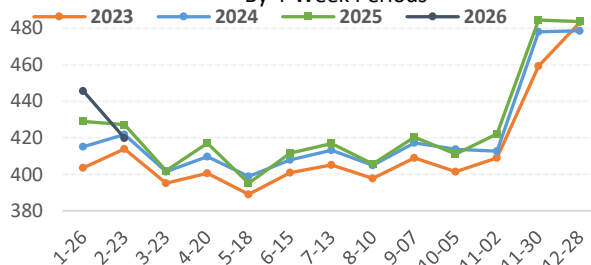
By week

Volume	% Chg vs Yago
4 wks end 1-25	3.9%
wk end 1-4	-0.7%
wk end 1-11	-3.4%
wk end 1-18	-2.0%
wk end 1-25	+23.2%
4 wks end 2-22	-1.7%
wk end 2-1	-3.6%
wk end 2-8	-2.1%
wk end 2-15	-1.8%
wk end 2-22	+0.7%

## Quad-week Sales View

### CHEESE RETAIL VOLUME, Million Pounds

By 4-Week Periods



## Purchase Dynamics, Latest 52 Weeks

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**  
42.5 lbs per buyer  
-0.2% vs Yago

**Purchase Frequency**  
29.3 X/yr  
flat vs Yago

**Purchase Size**  
1.4 lbs/trip  
-0.2% vs Yago

## Regional Volume Trend

% Chg vs Yago	Volume Index	Latest 52 Wks	2026YTD	Latest 4 Wks
<b>TOTAL U.S.</b>	<b>100</b>	<b>0.8%</b>	<b>1.1%</b>	<b>-1.7%</b>
California	79	0.7%	0.5%	-0.2%
Great Lakes	105	0.9%	0.7%	-2.0%
Mid-South	106	0.7%	1.8%	-2.7%
Northeast	97	0.5%	2.6%	-1.2%
Plains	120	1.3%	-0.1%	-2.1%
South Central	84	0.8%	1.0%	-4.6%
Southeast	105	0.4%	1.2%	0.3%
West	114	1.3%	0.1%	-1.9%

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## Largest Cheese Types Volume Trend

	52 Wks Volume (M lbs)	52 Wks Vol Share	Latest 52 Wks	2026YTD (2/22)	Latest 4 Wks
<b>Total Cheese</b>	<b>5,535.4</b>	<b>100.0%</b>	<b>0.8%</b>	<b>1.1%</b>	<b>-1.7%</b>
<b>Total Natural</b>	<b>4,824.1</b>	<b>87.1%</b>	<b>1.5%</b>	<b>1.6%</b>	<b>-1.2%</b>
Cheddar	1,127.5	20.4%	-0.4%	-1.4%	-4.3%
Mozzarella	890.1	16.1%	2.3%	2.9%	0.0%
Cream Cheese	557.2	10.1%	0.2%	1.2%	-0.8%
Blend	489.9	8.9%	-0.4%	-0.1%	-3.5%
Colby Jack	364.7	6.6%	3.9%	4.9%	1.1%
Hispanic	203.3	3.7%	10.4%	6.6%	5.1%
Parmesan	201.1	3.6%	2.4%	3.4%	0.8%
Swiss	137.6	2.5%	-2.2%	0.5%	-1.8%
Pepper Jack	106.3	1.9%	-0.8%	1.9%	-0.8%
Ricotta	104.2	1.9%	1.4%	-1.0%	-3.0%
Provolone	92.1	1.7%	1.0%	3.4%	1.0%
Monterey Jack	89.3	1.6%	-0.5%	1.0%	-1.2%
Feta	63.1	1.1%	2.5%	1.9%	1.8%
Gouda	50.2	0.9%	7.9%	11.9%	8.7%
Muenster	49.6	0.9%	0.8%	2.7%	-0.4%
Havarti	31.3	0.6%	-4.3%	-1.9%	-4.2%
Goat	21.6	0.4%	1.4%	0.7%	-0.5%
Brie	17.0	0.3%	-3.4%	4.0%	0.5%
Colby	12.3	0.2%	-8.0%	-7.3%	-9.8%
<b>Total Processed</b>	<b>688.4</b>	<b>12.4%</b>	<b>-3.3%</b>	<b>-1.8%</b>	<b>-5.3%</b>
American	476.4	8.6%	-2.4%	-0.9%	-4.4%
<b>Total Imitation/Plant</b>	<b>21.6</b>	<b>0.4%</b>	<b>-9.5%</b>	<b>-8.3%</b>	<b>-12.3%</b>

## Largest Cheese Types Pricing Trend

	-- Avg Price/Gal--			-- % Chg vs Yago --		
	Latest 52 Wks	2026YTD (2/22)	Latest 4 Wks	Latest 52 Wks	2026YTD (2/22)	Latest 4 Wks
<b>Total Cheese</b>	<b>\$5.59</b>	<b>\$5.55</b>	<b>\$5.51</b>	<b>-0.5%</b>	<b>-1.9%</b>	<b>-1.5%</b>
<b>Total Natural</b>	<b>\$5.68</b>	<b>\$5.63</b>	<b>\$5.59</b>	<b>-0.6%</b>	<b>-2.3%</b>	<b>-1.9%</b>
Cheddar	\$5.20	\$5.16	\$5.13	-1.0%	-2.7%	-2.2%
Mozzarella	\$4.87	\$4.74	\$4.71	0.1%	-3.4%	-3.2%
Cream Cheese	\$5.32	\$5.31	\$5.26	-2.9%	-4.0%	-3.9%
Blend	\$4.68	\$4.65	\$4.62	-2.3%	-4.6%	-3.6%
Colby Jack	\$4.84	\$4.73	\$4.71	-2.8%	-6.2%	-5.5%
Hispanic	\$5.54	\$5.51	\$5.48	-0.2%	0.6%	0.1%
Parmesan	\$9.45	\$9.54	\$9.58	3.5%	3.0%	4.0%
Swiss	\$7.84	\$7.90	\$7.80	1.9%	0.7%	0.4%
Pepper Jack	\$5.38	\$5.22	\$5.18	-1.8%	-6.4%	-6.2%
Ricotta	\$3.25	\$3.34	\$3.32	2.9%	2.7%	2.0%
Provolone	\$6.24	\$6.10	\$6.01	-1.9%	-4.0%	-4.9%
Monterey Jack	\$4.67	\$4.59	\$4.56	-3.2%	-5.6%	-5.8%
Feta	\$9.55	\$9.69	\$9.55	-0.9%	0.4%	-0.6%
Gouda	\$8.14	\$7.98	\$7.90	-2.4%	-5.0%	-5.1%
Muenster	\$5.99	\$5.81	\$5.77	-2.2%	-5.8%	-6.1%
Havarti	\$7.31	\$7.19	\$7.15	2.7%	-0.7%	-0.9%
Goat	\$13.35	\$13.60	\$13.48	-0.8%	-0.6%	-1.8%
Brie	\$12.89	\$12.87	\$12.77	3.2%	3.5%	3.9%
Colby	\$5.46	\$5.44	\$5.39	-0.8%	-2.5%	-3.4%
<b>Total Processed</b>	<b>\$4.85</b>	<b>\$4.86</b>	<b>\$4.82</b>	<b>-0.1%</b>	<b>0.4%</b>	<b>0.8%</b>
American	\$5.00	\$5.08	\$5.05	-0.3%	0.3%	1.0%
<b>Total Imitation/Plant</b>	<b>\$8.07</b>	<b>\$8.06</b>	<b>\$8.22</b>	<b>0.7%</b>	<b>1.8%</b>	<b>2.9%</b>

## Volume Trends by Top Cheese Forms

	Volume % Chg vs Yago			Volume Share
	Latest 52 Wks	2026YTD (2/22)	Latest 4 Wks	
<b>Total Cheese</b>	<b>0.8%</b>	<b>1.1%</b>	<b>-1.7%</b>	100.0%
Shredded	-0.2%	-0.4%	-3.4%	29.8%
Sliced	-1.4%	-1.2%	-3.9%	19.7%
Chunk	5.5%	4.0%	0.5%	15.6%
String/Stick	2.3%	4.9%	3.6%	5.8%
Loaf	-3.0%	-2.4%	-7.4%	2.3%
Grated	-1.3%	1.2%	-1.7%	2.0%
Grab & Go*	6.0%	16.5%	13.2%	1.9%
Ricotta	1.4%	-1.0%	-3.0%	1.9%
Round	7.8%	2.9%	-1.3%	1.7%
Crumbled	0.7%	2.8%	3.3%	1.4%
Spread	-3.1%	-5.3%	-6.2%	1.2%
Ball	7.5%	7.8%	-0.4%	0.7%
Cube	6.7%	7.2%	2.3%	0.6%



\* pre-sliced  
deli cheese

## New Product Spotlight: a sampling of new products



**USA (Mar 2026)**  
**TRADER JOE'S**  
Whipped carrot  
cake cream cheese  
spread.



**USA (Mar 2026)**  
**KRAFT BIG**  
Natural  
cheese.17g  
protein per stick.



**GREECE (Mar 2026),**  
produced in Spain  
**KOUKREAM** Cream  
cheese with a  
unique flavor &  
probiotic benefits  
from kefir.



**USA (Mar 2026)**  
**KROGER SIMPLE**  
**TRUTH**  
Individual reduced  
fat cheddar &  
Monterey snack  
bars. 7g  
protein/bar.



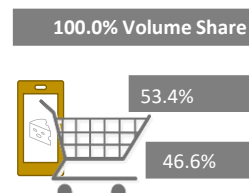
**CHINA (Mar 2026),**  
**MILKGROUND** Fruit-  
flavored cheese  
sticks with ~6 times  
the calcium of milk  
to support children's  
growth and bone  
development.  
Added taurine &  
prebiotics.

## E-Commerce Sales Trend

E-Commerce, 12% Volume			Brick & Mortar, 88% Volume		
Year	Volume	% chg	Year	Volume	% chg
2020	392		2020	5,140	
2021	422	7.9%	2021	4,921	-4.3%
2022	442	4.6%	2022	4,880	-0.8%
2023	491	11.1%	2023	4,860	-0.4%
2024	573	16.7%	2024	4,885	0.5%
2025	666	16.2%	2025	4,847	-0.8%
2026YTD	122	23.7%	2026YTD	741.6	-1.8%
4 Wks	59	18.5%	4 Wks	359.9	-4.4%

Volume share based on Circina MULO+

## Volume Share and Trend by Outlet



% Volume Chg vs Yago	Latest 52 Wks	2026YTD	Latest 4 Wks
<b>TOTAL U.S.</b>	<b>0.8%</b>	<b>1.1%</b>	<b>-1.7%</b>
Grocery	-1.1%	-1.5%	-4.3%
Supercenters, Club, Other	3.0%	4.2%	1.4%