

# TOTAL DAIRY RETAIL SNAPSHOT

## 52 Weeks, 2025YTD and 4 Weeks Ending 7-13-2025

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### DAIRY SALES REMAIN HEALTHY IN 2025

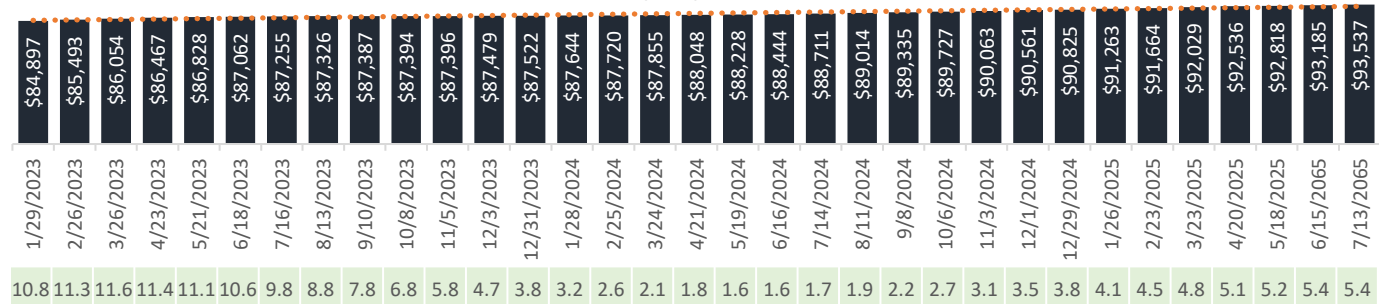
Dairy is showing healthy, broad-based growth with the largest category, cheese, continuing to register moderate volume gains and cultured products, butter and specialty creamers fueling strong momentum.

- In the past four weeks, total retail dairy category dollar sales rose by 4.9% and unit sales increased by 3.3% compared to the same period last year.
- Pricing pressure is moderate with an uptick in the dairy consumer price index driven by small increases in milk and ice cream. However, dairy price inflation remains below that of overall food.
- Regional gains in dairy sales growth is broad-based, with the strongest gains in the southern and western markets.
- Dairy remains dominant share compared to non-dairy offerings in core categories of cheese, milk and yogurt and is continuing to grow volume in the competitive cream/creamers market.

- Category volume highlights in the latest four weeks compared to year ago
  - Strongest growth: Dairy creamer +23.6%, Cottage cheese +14.2%, Yogurt +9.5%, Cream spreads +5.9%, Butter/butter blends +4.7%
  - Moderate growth: Fz Novelties +2.0%, Dairy cream/half & half +2.0%, Cheese +1.5%, Whipping cream +0.7%, Sour cream +0.5%
  - Declines: Milk -0.8%, Ice cream/sherbet -3.3%

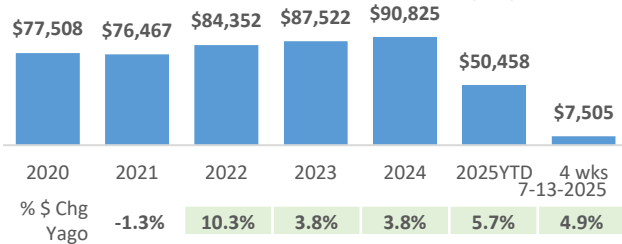
## Rolling 52 Weeks Dollar Trend

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



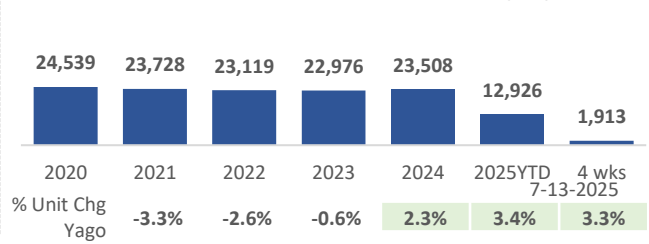
## Calendar Year Dollar Trend

TOTAL DAIRY RETAIL DOLLARS (Mil)



## Calendar Year Unit Trend

TOTAL NUMBER DAIRY UNITS SOLD (Mil)



## Purchase Dynamics, 52 Weeks ending 7-13-2025

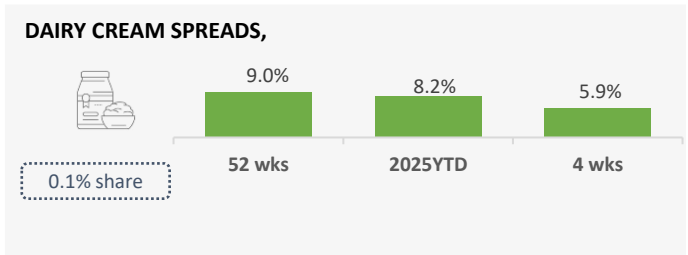
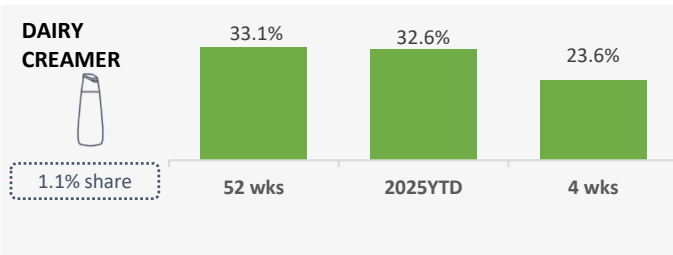
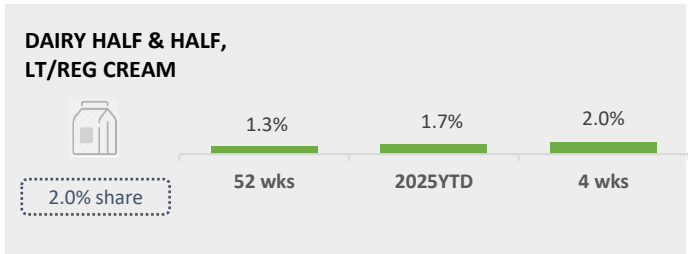
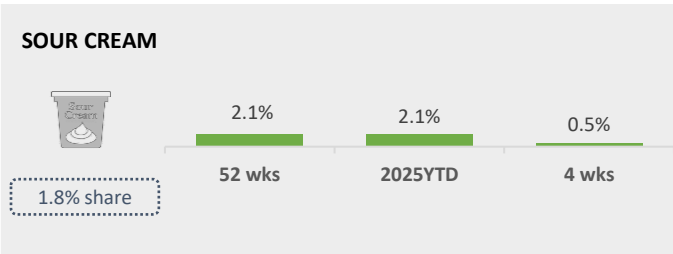
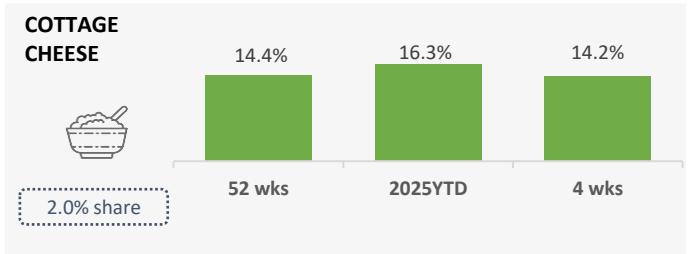
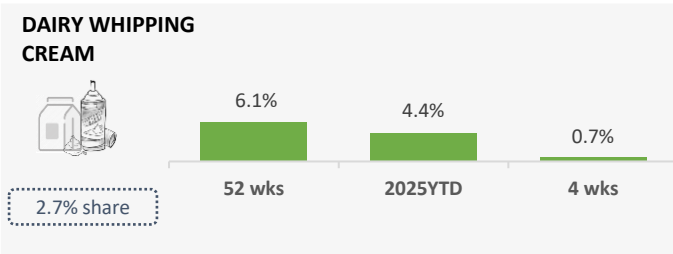
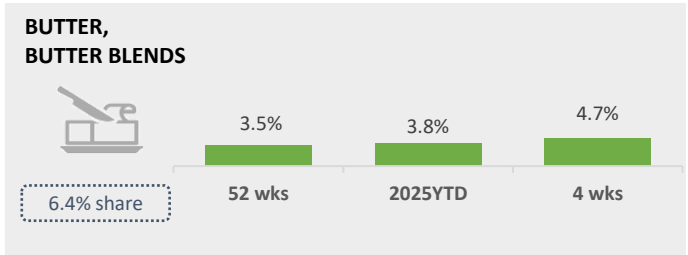
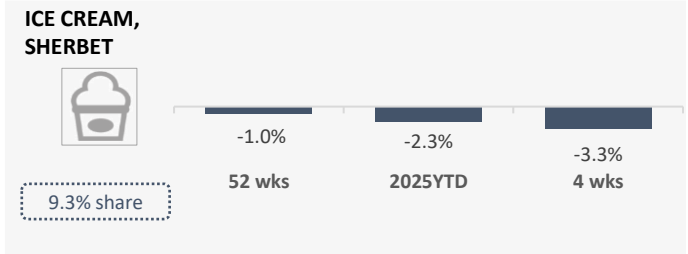
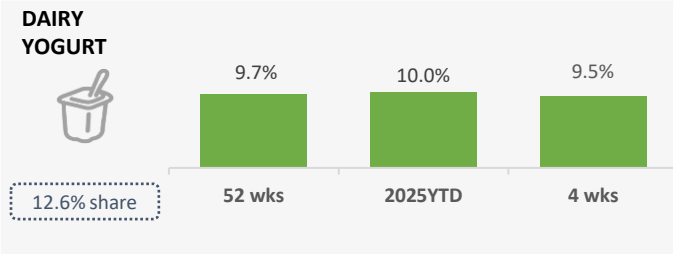
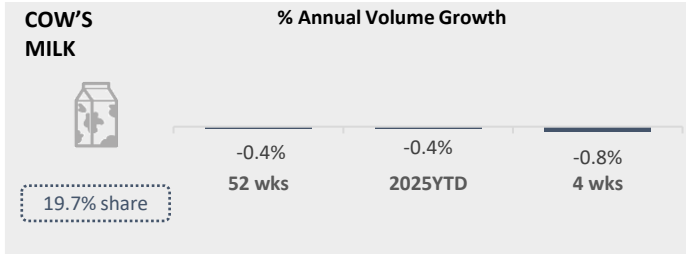
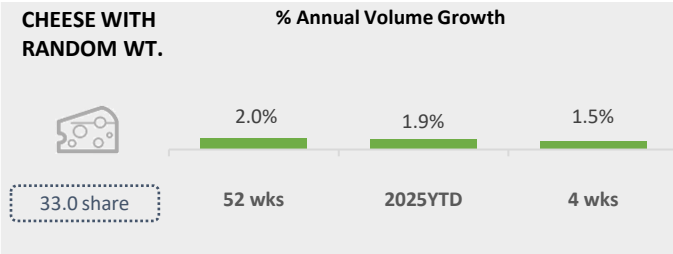
Product	% Households Buy	Pt Chg vs Yago	Volume per Buyer	Vol/Buyer % Chg vs Yago	# Trips per Buyer	% Chg Trips/Buyer	Volume per Trip	% Chg Vol/Trip
Cheese*	96.7%	0.4	42.7 lbs	2.4	29.5	5.0	1.4	-1.5
Cow's Milk	91.7%	0.0	29.7 gal	1.0	30.2	2.6	1.0	-1.0
Dairy Yogurt	82.4%	1.0	40.7 pints	8.7	16.8	9.9	2.4	0.8
Ice Cream, Sherbet	82.0%	-0.5	41.6 pints	0.0	10.3	1.2	4.0	-1.2
Fz. Novelties	77.8%	-0.9	22.8 16 oz pkg	1.4	9.7	0.4	2.4	0.5
Butter, Blends	77.8%	1.3	12.6 lbs	2.4	8.0	6.4	1.6	-1.6
Sour Cream	72.1%	-0.2	8.1 pints	2.4	7.0	2.9	1.2	-0.3
Dairy Whipping Cream	61.7%	0.9	9.0 pints	5.2	6.1	6.2	1.5	1.2
Cottage Cheese	47.7%	2.8	11.9 pints	8.2	7.0	14.3	1.7	1.1
Dairy H+H, Lt/Reg Cream	33.1%	-0.5	22.4 pints	2.9	8.8	2.3	2.5	-0.1
Dairy Creamer	17.5%	2.2	15.2 pints	16.3	6.3	32.1	2.4	1.4
Dairy Cream Spreads	3.3%	0.3	3.2 pints	-1.4	3.1	12.6	1.0	-3.5

Note: Cheese excludes vegan, imitation, and goat & sheep varieties

# TOTAL DAIRY RETAIL SNAPSHOT

52 Weeks, 2025YTD and 4 Weeks Ending 7-13-2025

## Product Volume % 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 7-13-2025

## Retail Pricing

Average Price per Vol. Equivalent

% Price Change vs. Year Ago

Category	52 Wks	2025YTD	4 wks
Cheese incl random wt (prc/lb)*	\$5.63	\$5.66	\$5.66
Cow's Milk (prc/gal)	\$5.25	\$5.22	\$5.22
Wht Conventional Gallon-size	\$3.60	\$3.57	\$3.51
Dairy Yogurt (pint)	\$2.82	\$2.85	\$2.90
Ice Cream, Sherbet (prc/pint)	\$1.97	\$1.99	\$1.93
Fz Novelties ( prc 16 oz pkg)	\$3.79	\$3.79	\$3.55
Butter/Blends (lb)	\$4.90	\$4.93	\$4.87
Dairy Whip Cream, liquid/aerosol (prc/pint)	\$3.63	\$3.64	\$3.73
Sour Cream (prc/pint)	\$2.58	\$2.59	\$2.60
Dairy Half & Half, Lt/Reg Cream (prc/pint)	\$1.81	\$1.80	\$1.80
Cottage Cheese (prc/pint)	\$2.68	\$2.70	\$2.70
Dairy Creamer (prc/pint)	\$2.95	\$2.96	\$3.05
Dairy Cream Spreads – (prc/pint)	\$4.18	\$4.16	\$4.06

\*excludes vegan and imitation

Category	52 Wks	2025YTD	4 wks
Cheese incl random wt (prc/lb)*	1.4%	2.1%	2.5%
Cow's Milk (prc/gal)	4.5%	4.4%	3.0%
Wht Conventional Gallon-size	3.7%	2.7%	-0.9%
Dairy Yogurt (pint)	2.9%	3.7%	4.4%
Ice Cream, Sherbet (prc/pint)	2.0%	2.8%	3.0%
Fz Novelties ( prc 16 oz pkg)	1.7%	2.7%	1.7%
Butter/Blends (lb)	5.7%	3.6%	-0.4%
Dairy Whip Cream, liquid/aerosol (prc/pint)	3.3%	3.1%	4.3%
Sour Cream (prc/pint)	2.8%	2.5%	3.1%
Dairy Half & Half, Lt/Reg Cream (prc/pint)	4.0%	2.6%	0.9%
Cottage Cheese (prc/pint)	5.5%	5.5%	3.3%
Dairy Creamer (prc/pint)	3.8%	3.3%	7.3%
Dairy Cream Spreads – (prc/pint)	-1.0%	-1.1%	-1.9%

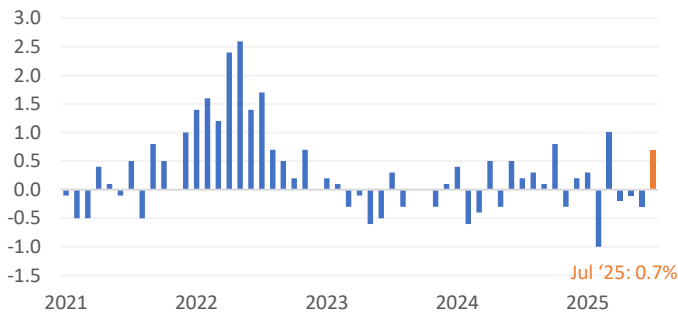


The CPI measures change in consumer prices over time based on a basket of goods.

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

## Consumer Price Index – Dairy Products

Month-over-month % change, Jan 2021–Jul 2025  
seasonally adjusted



## 12 Month Inflation Rate, not seasonally adjusted

Dairy prices remain above last year (+1.5%) at this time but have increased more modestly compared to the overall food at-home index.

	All Items	Food Away	Food At-Home
Jan '25	3.0%	3.4%	1.9%
Feb '25	2.8%	3.7%	1.9%
Mar '25	2.4%	3.8%	2.4%
Apr '25	2.3%	3.9%	2.0%
May '25	2.4%	3.8%	2.2%
Jun '25	2.7%	3.8%	2.4%
Jul '25	2.7%	3.9%	2.2%

	Dairy	Milk	Cheese	Ice Cream	Butter
Jan '25	1.2%	1.8%	0.1%	2.5%	1.9%
Feb '25	0.8%	1.5%	0.0%	0.8%	1.9%
Mar '25	2.2%	2.9%	2.2%	1.2%	5.5%
Apr '25	1.6%	3.9%	2.1%	-2.8%	1.5%
May '25	1.7%	3.3%	2.8%	0.0%	1.9%
Jun '25	0.9%	2.1%	2.9%	-0.6%	-0.4%
Jul '25	1.5%	2.6%	2.3%	1.0%	-1.6%

## REAL Dairy vs. Alternatives Spotlight

### 52 WEEKS ENDING 7-13-2025 RETAIL VOLUME % CHANGE VS. YEAR AGO

■ Dairy ■ Non-Dairy Alternatives

Dairy:  
90% Vol share

3,506.9  
371.4

Milk, gallons

Vol % Chg	-0.4%	-6.0%
Vol Chg	-13.2M gal	-23.7M gal

Dairy:  
99% Vol share

5,507.4  
28.2

Cheese, pounds

	+2.0%	-6.4%
	+107.0M lbs	-1.9M lbs

Dairy:  
98% Vol share

4,184.4  
77.5

Dairy Yogurt, pints

	+9.7%	20.6%
	+370.7M pts	+13.2M pts

Dairy:  
99% Vol share

695.0  
6.5

Whipping Cream

	+6.1%	+7.3%
	+40.2M pts	+0.4M pts

Dairy:  
36% Vol share

1,283.7  
2,295.4

Cream/Creamer, pints

	+8.0%	-0.01%
	+95.3M pts	-0.2M pts

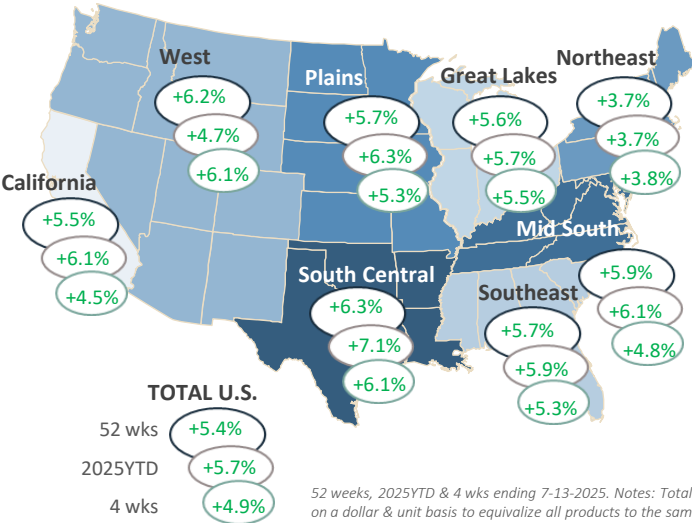
Dairy includes goat & sheep

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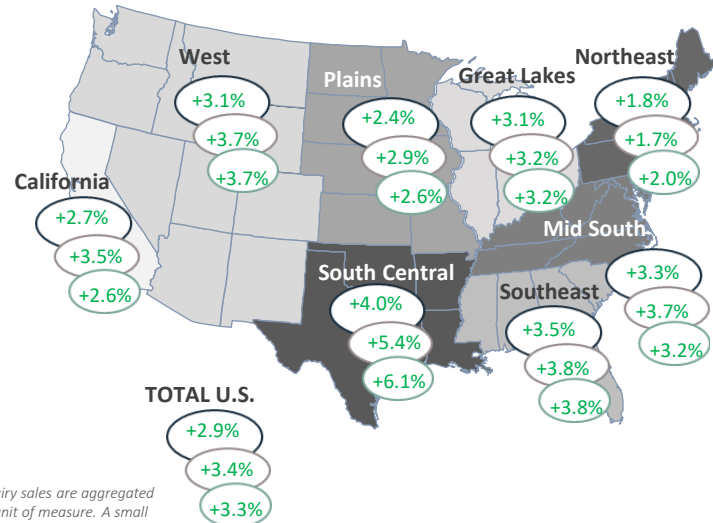
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## Total Dairy Category Sales View by Region

Dollar Sales % Chg vs. Year Ago



Unit Sales % Chg vs. Year Ago



52 weeks, 2025YTD & 4 wks ending 7-13-2025. 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

	Cheese w Random Wt	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>	<b>2.0%</b>	<b>-0.4%</b>	<b>9.7%</b>	<b>-1.0%</b>	<b>-0.1%</b>	<b>3.5%</b>	<b>6.1%</b>	<b>2.1%</b>	<b>1.3%</b>	<b>14.4%</b>	<b>33.1%</b>	<b>9.0%</b>
California	2.5%	0.1%	9.3%	-0.9%	-1.2%	2.6%	0.1%	3.7%	1.8%	17.4%	32.9%	9.6%
Great Lakes	2.0%	-0.5%	10.6%	-0.9%	1.5%	2.7%	5.8%	1.9%	1.5%	10.5%	36.8%	28.1%
Mid-South	2.1%	-0.1%	10.5%	-1.2%	0.5%	3.6%	12.6%	2.1%	-0.8%	15.6%	30.4%	-1.6%
Northeast	0.1%	-0.8%	7.9%	-1.7%	-2.0%	3.1%	6.0%	0.7%	0.7%	15.6%	24.3%	6.6%
Plains	2.5%	-0.8%	10.1%	-1.0%	1.5%	2.5%	0.5%	1.7%	2.9%	9.4%	38.2%	10.9%
S. Central	2.6%	-0.9%	11.3%	-1.0%	-0.2%	6.0%	10.4%	1.9%	4.6%	17.2%	36.7%	11.3%
Southeast	2.5%	0.1%	9.6%	-0.5%	-0.1%	3.4%	10.1%	1.7%	2.0%	19.5%	34.7%	11.2%
West	2.6%	-0.1%	9.8%	-0.8%	0.3%	4.5%	3.0%	3.2%	1.0%	15.2%	36.7%	7.0%

## New Product Spotlight

A sampling of new dairy products launched recently



**USA (Aug '25)**  
**Starbucks** Pumpkin spice latte and caramel macchiato inspired flavored coffee creamer with real milk and cream



**USA (Aug '25)**  
**Bullet Proof** Dry creamer made with grass-fed butter and MCT oil. No added sugar. Brain, body and energy. Boosts metabolism.



**USA (Aug '25)**  
**Trader Joe's** Vanilla flavored cold foam creamer. Made with skimmed milk.

**USA (Aug '25)**  
**Alexandre Family Farm** A2/A2 half milk and half cream with 16% milkfat. 30% creamier than regular half & half.



**USA (Aug '25)**  
**Jeni's** ultra-rich and fudge-like chocolate ice cream, packed with velvety black cocoa and classic Fair-Trade cocoa, rippled with decadent espresso fudge, and a naturally colored balsamic cherry jam.



**USA (Aug '25)**  
**Once Upon A Farm** Organic blueberry burst smoothie melts, for babies from 8 months. Made with organic cultured milk and organic whole milk powder.

Source: Innova