TOTAL U.S. CHEESE SNAPSHOT

52 Weeks, Year-to-date, and 4 Weeks Ending 9-06-2026



CHEESE GROWTH SLOWS IN RECENT WEEKS

Cheese volume rose 0.3% YTD, but fell 1.5% in the latest four weeks, indicating a softer Labor Day period for cheese compared to last year. Average prices declined 2.2% YTD and 1.7% in the latest period.

Natural cheese continues to outperform processed. YTD volume increased 0.8% for natural cheese versus a 3.1% decline for processed. Mozzarella (+2.1%), Colby Jack (+3.3%) and Hispanic cheeses (+5.4%) continue to see growth, while cheddar declined 2.0%.

Deli remains a source of category growth. Representing approximately 20% of cheese volume, deli grew 3.1% YTD, versus a small decline for the non-deli cheese. Deli grab & go ((pre-sliced & packed by retailer) led with 16.1% growth YTD and 8.9% in the latest four weeks.

Sales performance varies sharply by product form. String/stick (+4.3%) and chunk (+3.8%) gained volume YTD, while the two largest forms, shredded (−1.3%) and sliced (−2.2%), declined. Part of the decline in these cheese forms may be shifts to Deli Grab & Go and dairy case chunk formats.

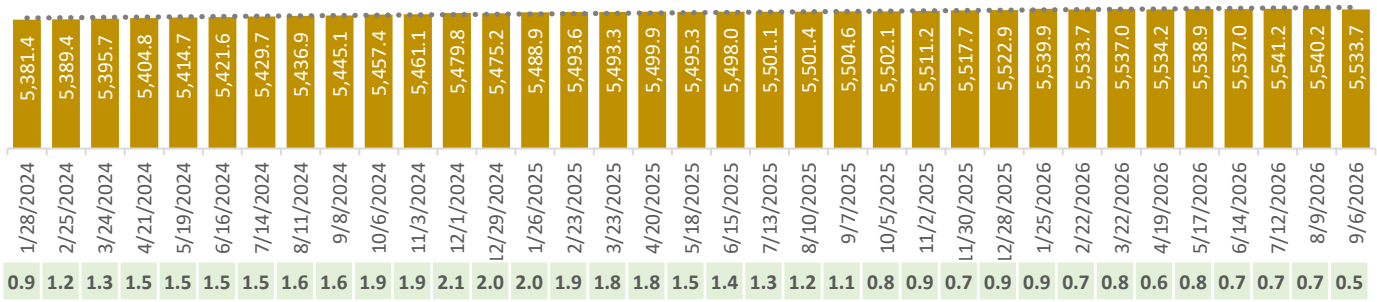
Growth favors outlets beyond traditional grocery. Supercenters, club and other outlets increased volume 3.0% YTD, compared with a 2.0% decline in traditional grocery. This divergence continued in the latest four weeks: +0.4% versus −3.2%.

Source: POS data Circana MULO+ with convenience

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

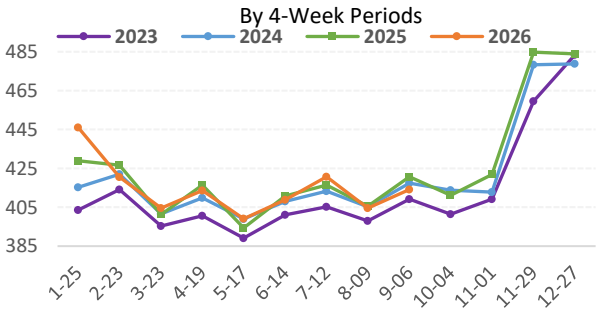


	2021	2022	2023	2024	2025	2026 YTD -- 9-06-2026 --	4 wks ending
% Vol Chg Yago	-0.4%	0.5%	2.0%	0.9%	0.3%	-1.5%	

Quad-week Sales View

CHEESE RETAIL VOLUME, Million Pounds

By 4-Week Periods



Spotlight on Deli Cheese



Deli: 20% Cheese Volume

Volume % Chg vs Year Ago

	52 Wk Volume M lbs	52 Wks	2026YTD	4 Wks
Total Deli Cheese	**1,094.1**	**3.5%**	**3.1%**	**0.6%**
Deli Specialty Chs	770.0	3.5%	3.2%	1.5%
Deli Service	115.4	-0.5%	-1.1%	-3.0%
Deli Grab & Go	114.2	16.2%	16.1%	8.9%
Deli Pre-sliced	94.4	-4.2%	-6.7%	-10.2%
Non-Deli Cheese	**4,439.8**	**-0.2%**	**-0.4%**	**-2.1%**

Source: Circana Integrated Fresh, MULO+ w convenience

**Grab & go is pre-sliced and packed by retailer. Deli pre-sliced is prepackaged sliced cheese made by deli brands and sold in deli*

Regional Volume Trend

% Chg vs Yago	Volume Index	Latest 52 Wks	2026YTD	Latest 4 Wks
TOTAL U.S.	**100**	0.5%	0.3%	-1.5%
California	79	-0.5%	-1.2%	-2.2%
Great Lakes	106	0.8%	0.4%	-1.6%
Mid-South	106	0.9%	0.8%	-1.2%
Northeast	97	0.6%	0.4%	-2.2%
Plains	120	0.8%	0.3%	-1.9%
South Central	84	0.7%	0.4%	-1.6%
Southeast	105	0.3%	0.6%	-1.4%
West	113	0.5%	0.2%	-0.3%

TOTAL U.S. CHEESE SNAPSHOT

52 Weeks, Year-to-date, and 4 Weeks Ending 9-06-2026

Largest Cheese Types Volume Trend

	52 Wks Volume (M lbs)	52 Wks Vol Share	Latest 52 Wks	2026YTD (9/06)	Latest 4 Wks
Total Cheese	**5,533.7**	**100.0%**	**0.5%**	**0.3%**	**-1.5%**
Total Natural	**4,836.5**	**87.4%**	**1.1%**	**0.8%**	**-0.9%**
Cheddar	1,111.5	20.1%	-1.6%	-2.0%	-3.4%
Mozzarella	900.7	16.3%	2.3%	2.1%	1.6%
Cream Cheese	559.6	10.1%	0.9%	1.0%	-0.5%
Blend	487.0	8.8%	-0.5%	-0.9%	-2.4%
Colby Jack	369.9	6.7%	3.8%	3.3%	1.2%
Hispanic	209.1	3.8%	6.2%	5.4%	4.8%
Parmesan	204.2	3.7%	2.8%	3.0%	3.9%
Swiss	136.6	2.5%	-0.7%	-0.8%	-2.6%
Pepper Jack	107.8	1.9%	1.8%	2.2%	1.1%
Ricotta	103.3	1.9%	-0.4%	-1.7%	-3.6%
Provolone	93.3	1.7%	3.2%	2.8%	1.0%
Monterey Jack	89.1	1.6%	0.0%	-0.3%	-0.9%
Feta	63.5	1.1%	1.3%	1.4%	-4.0%
Gouda	51.9	0.9%	7.6%	7.5%	1.1%
Muenster	49.3	0.9%	1.0%	-0.2%	-0.9%
Havarti	31.1	0.6%	-1.9%	-1.9%	-2.1%
Goat	21.1	0.4%	-2.2%	-3.7%	-10.4%
Brie	17.0	0.3%	-1.1%	0.8%	-2.0%
Romano	11.3	0.2%	-7.7%	-7.7%	-4.7%
Total Processed	**674.9**	**12.2%**	**-3.1%**	**-3.1%**	**-6.2%**
American	472.3	8.5%	-2.4%	-2.7%	-5.0%
Total Imitation/Plant	**20.6**	**0.4%**	**-8.8%**	**-9.1%**	**-13.1%**

Largest Cheese Types Pricing Trend

	-- Avg Price/Gal--			-- % Chg vs Yago --		
	Latest 52 Wks	2026YTD (9/06)	Latest 4 Wks	Latest 52 Wks	2026YTD (9/06)	Latest 4 Wks
Total Cheese	**$5.53**	**$5.53**	**$5.53**	**-2.1%**	**-2.2%**	**-1.7%**
Total Natural	**$5.61**	**$5.61**	**$5.61**	**-2.5%**	**-2.6%**	**-2.1%**
Cheddar	$5.15	$5.14	$5.15	-2.9%	-3.0%	-2.2%
Mozzarella	$4.79	$4.79	$4.85	-3.0%	-3.3%	-2.2%
Cream Cheese	$5.16	$5.21	$5.09	-5.3%	-5.7%	-7.5%
Blend	$4.60	$4.58	$4.56	-4.0%	-3.7%	-2.9%
Colby Jack	$4.71	$4.70	$4.68	-5.4%	-5.5%	-4.4%
Hispanic	$5.49	$5.44	$5.45	-0.8%	-1.3%	-2.5%
Parmesan	$9.57	$9.59	$9.61	2.7%	2.5%	2.1%
Swiss	$7.76	$7.61	$7.49	-0.4%	-1.4%	-1.7%
Pepper Jack	$5.16	$5.11	$5.08	-6.6%	-7.3%	-6.3%
Ricotta	$3.26	$3.31	$3.34	1.7%	1.1%	0.9%
Provolone	$6.07	$6.00	$5.94	-4.4%	-4.9%	-4.4%
Monterey Jack	$4.63	$4.65	$4.69	-3.6%	-2.7%	-0.9%
Feta	$9.53	$9.56	$9.51	-0.4%	-0.2%	4.3%
Gouda	$8.03	$7.94	$7.89	-3.4%	-3.5%	-1.3%
Muenster	$5.78	$5.71	$5.69	-5.7%	-6.3%	-5.8%
Havarti	$7.16	$7.03	$6.81	-2.1%	-3.5%	-6.3%
Goat	$13.40	$13.68	$13.79	-0.1%	0.0%	2.6%
Brie	$12.93	$13.10	$13.09	2.0%	1.2%	0.4%
Romano	$14.67	$14.68	$14.82	4.5%	3.8%	-0.5%
Total Processed	$4.85	$4.84	$4.88	0.1%	0.4%	0.8%
American	$5.03	$5.00	$5.03	0.2%	0.5%	0.8%
Total Imitation/Plant	**$8.05**	**$8.01**	**$7.96**	**0.2%**	**0.1%**	**1.7%**

Volume Trends by Top Cheese Forms

	Volume % Chg vs Yago			Volume Share
	Latest 52 Wks	2026YTD (9/06)	Latest 4 Wks	
Total Cheese	**0.5%**	**0.3%**	**-1.5%**	100.0%
Shredded	-0.9%	-1.3%	-2.7%	29.5%
Sliced	-1.9%	-2.2%	-3.8%	19.4%
Chunk	3.9%	3.8%	2.4%	15.8%
Cream Chs	1.0%	1.2%	-0.2%	10.1%
String/Stick	3.9%	4.3%	3.3%	6.0%
Loaf	-2.8%	-2.9%	-9.8%	2.2%
Grab & Go*	16.1%	16.1%	8.8%	2.1%
Grated	-0.2%	0.6%	2.0%	2.0%
Ricotta	-0.4%	-1.7%	-3.5%	1.9%
Round	1.2%	0.0%	-11.3%	1.7%
Crumbled	1.0%	0.9%	-6.9%	1.4%
Spread	-3.2%	-3.2%	-7.2%	1.2%
Ball	7.3%	3.3%	0.1%	0.7%
Cube	6.5%	5.3%	4.0%	0.6%



** pre-sliced deli cheese*

New Product Spotlight: a sampling of new products



USA (Sep 2026) **Philadelphia** New flavors: Mike's Hot Honey (launches in Walmart with wider launch in Jan), cranberry orange (limited time), and salted caramel.



GERMANY (Sep 2026) **Zuivelhoeve** Soft dessert cheese. Strawberry protein quark (25g protein per pouch).

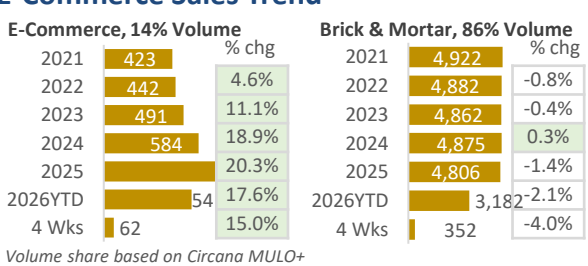


ITALY (Sep 2026) **Battista 1914** Quartirolo Lombardo DOP is an authentic Italian soft cheese from Lombardy, preserved in oil & infused with aromatic herbs

USA (Aug 2026) Land O Lakes Snack cheese cubes in Colby Jack, Pepper Jack, and Extra Sharp White Cheddar. Each package includes eight 1-ounce single-serve packs.

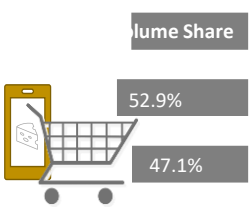


E-Commerce Sales Trend



Volume share based on Circana MULO+

Volume Share and Trend by Outlet



% Volume Chg vs Yago	Latest 52 Wks	2026YTD (9-06)	Latest 4 Wks
TOTAL U.S.	0.5%	0.3%	-1.5%
Grocery	-1.8%	-2.0%	-3.2%
Supercenters, Club, Other	3.3%	3.0%	0.4%