TOTAL U.S. MILK SNAPSHOT

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



MILK VOLUME REMAINS NEARLY STEADY AS VALUE-ADDED AND WHOLE GROWTH OFFSETS TRADITIONAL MILK DECLINES

Milk volume is holding close to year-ago levels. Volume declined 0.4% YTD and 0.5% in the latest four weeks. Dollar sales grew as the average price per gallon rose 3.8% YTD and 5.2% recently, reaching $5.58 in the latest 4 weeks. The average price for a gallon jug of traditional white milk was $3.74 in the latest 4 weeks, 5% above year ago.

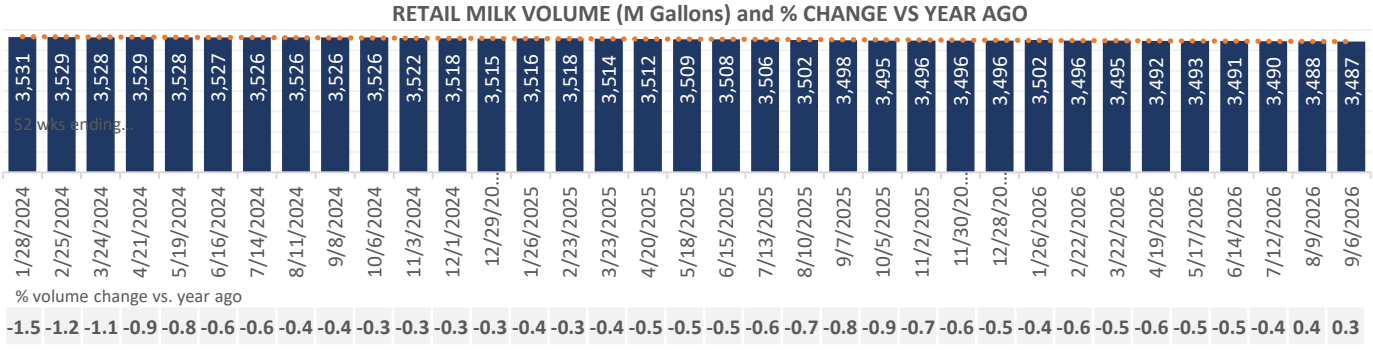
Value-added milk is helping offset weakness in traditional milk, reinforcing the importance of differentiated benefits. Value-added white volume grew 5.1% YTD and 5.9% in the latest 4 weeks, while traditional white declined 1.5% and 1.8%. Traditional white gallon-size milk weakened to −3.4% recently, suggesting the category's largest core format remains challenged.

Functional benefits show strong momentum. Ultrafiltered milk accelerated from +10.6% YTD to +28.2% in the latest 4 weeks, and lactose-free from +6.6% to +9.9. This pattern suggests protein and digestive benefits are strong current growth opportunities. A2 milk, while a small segment at 1.3% share continues to expand double-digits. *Note that segments overlap.*

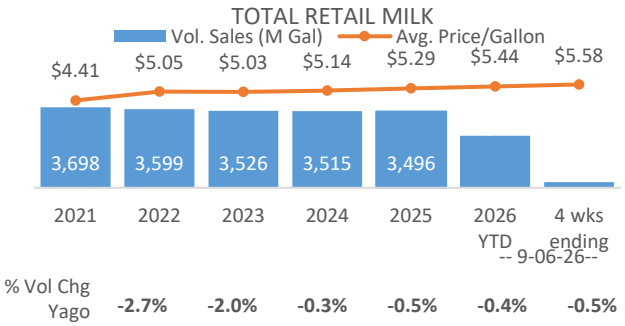
Whole milk's growth suggests continued preference for fuller-fat options within the category. Whole milk volume grew **3.9%** YTD and 3.3% recently, while recent volume declined for other fat levels. Over the past 52 weeks, unit sales of edibles with no/low/less fat claims declined 1.9%, supporting a shift away from lower fat food products.

Plant-based volume fell 5.6% YTD and 7.6% recently. Weakness is concentrated in almond and oat, while smaller soy and pea segments continue to grow. Soy grew 14.1% YTD and 6.6% recently, and pea accelerated from 7.0% to 17.8%. Soy and pea are increasingly relevant to protein, nutrition, and functionality within plant-based options

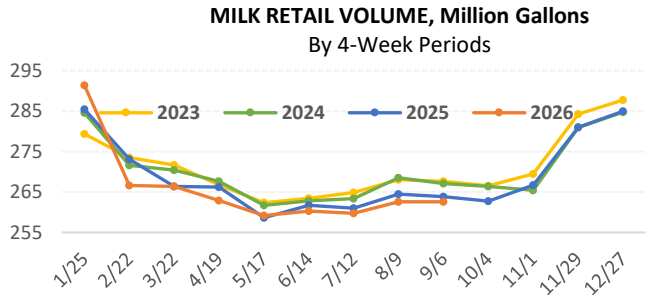
Rolling 52 Weeks Volume



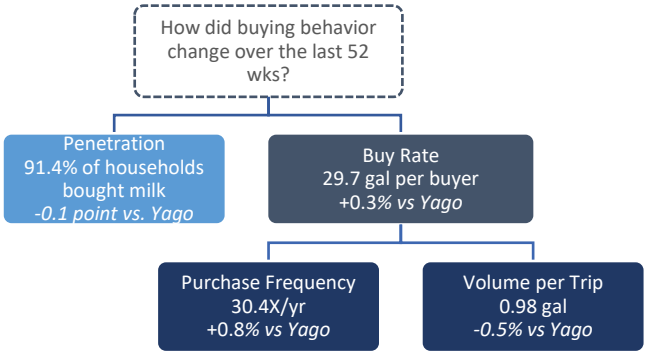
Calendar Year Volume and Price Trend



Quad-week Sales View



Purchase Dynamics, Latest 52 Weeks



Regional Volume Trend

% Chg vs Yago	Volume Index	Latest 52 Wks	2026YTD (9-06)	Latest 4 Wks
TOTAL U.S.	**100**	-0.3%	-0.4%	-0.5%
California	83	-0.2%	-0.3%	-0.6%
Great Lakes	112	-0.9%	-1.3%	-0.9%
Mid-South	110	-0.1%	-0.2%	-0.4%
Northeast	91	-0.4%	-0.4%	-1.2%
Plains	123	-0.4%	-0.6%	-1.0%
South Central	85	-0.4%	-0.5%	-0.2%
Southeast	102	0.1%	0.4%	0.5%
West	107	-0.1%	-0.1%	0.1%

TOTAL U.S. MILK SNAPSHOT

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

DMI DAIRY MANAGEMENT INC.

Milk Segments Volume Trend

-- % Chg vs Yago --

	52 Wks Volume (M gal)	52 Wks Vol Share	Latest 52 Wks	2026YTD (9-06)	Latest 4 Wks
TOTAL U.S.	**3,486.8**	**100.0%**	**-0.3%**	**-0.4%**	**-0.5%**
White	3,245.0	93.1%	-0.3%	-0.4%	-0.5%
Trad'l White	2,679.6	76.8%	-1.4%	-1.5%	-1.8%
Trad'l Wht Gallon	2,032.0	58.3%	-2.0%	-2.1%	-3.4%
Value-add White	565.4	16.2%	5.1%	5.1%	5.9%
Flavored + Milkshake	202.4	5.8%	-0.3%	-0.7%	-0.6%
Trad'l Flavored	161.9	4.6%	-1.1%	-1.8%	-2.6%
Value-add Flavored.	40.3	1.2%	2.6%	3.5%	7.1%
Buttermilk	20.4	0.6%	0.4%	0.4%	-2.1%
Eggnog	18.1	0.5%	-1.1%	18.5%	9.7%
Lactose-free	341.5	9.8%	6.9%	6.6%	9.9%
Organic	274.1	7.9%	2.0%	2.0%	-0.5%
Ultrafiltered	116.3	3.3%	9.9%	10.6%	28.2%
A2 (multiple brands)	45.0	1.3%	37.5%	31.6%	26.1%

Milk Segments 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 U.S.	**$5.42**	**$5.44**	**$5.58**	**2.7%**	**3.8%**	**5.2%**
White	$5.06	$5.12	$5.25	2.8%	3.8%	5.4%
Trad'l White	$4.00	$4.04	$4.16	0.2%	2.0%	5.0%
Trad'l Wht Gallon	$3.60	$3.64	$3.74	-0.1%	1.9%	5.0%
Value-add White	$10.09	$10.14	$10.15	4.7%	4.1%	2.3%
Flavored + Milkshake	$9.96	$10.04	$10.28	1.9%	2.5%	3.5%
Trad'l Flavored	$8.52	$8.59	$8.87	0.8%	1.8%	4.2%
Value-add Flavored.	$15.71	$15.72	$15.46	2.8%	1.9%	-1.6%
Buttermilk	$9.09	$9.12	$9.06	2.1%	1.8%	0.7%
Eggnog	$14.41	$15.85	$19.40	5.4%	6.2%	1.2%
Lactose-free	$10.38	$10.46	$10.42	3.2%	3.1%	2.9%
Organic	$10.50	$10.50	$10.62	6.8%	5.9%	2.2%
Ultra-filtered	$13.80	$13.96	$13.44	6.1%	5.3%	0.2%
A2 (multiple brands)	$9.47	$9.50	$9.91	2.7%	4.4%	6.3%

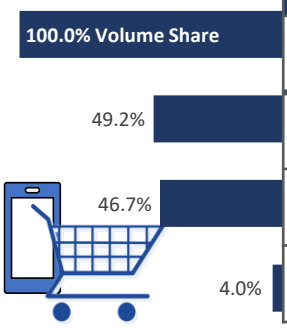
Volume Trends by Fat Content

	Volume % Chg vs Yago			Volume Share 52 Weeks
	Latest 52 Wks	2026YTD (9-06)	Latest 4 Wks	
Total Milk	**-0.3%**	**-0.4%**	**-0.5%**	100.0%
Whole Fat	3.8%	3.9%	3.3%	50.2%
2%	-2.7%	-2.8%	-2.2%	34.2%
1%	-6.9%	-7.6%	-8.1%	11.0%
Fat Free	-7.5%	-8.0%	-6.8%	4.7%



Penetration (% Households that purchased in latest 52 wks)
Total 91.4%; Whole 71.1%; 2% 60.4%; 1% 36.8%; FF 15.6%

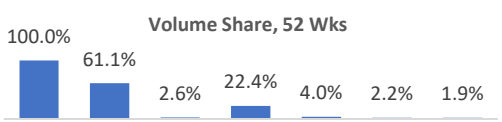
Volume Share and Trend by Outlet



% Volume Chg vs Yago	Latest 52 Wks	2026YTD (9-06)	Latest 4 Wks
TOTAL U.S.	**-0.3%**	**-0.4%**	**-0.5%**
Grocery	-2.3%	-2.4%	-2.3%
Supercenters, Club, Other	2.6%	2.5%	2.3%
C-Store	-8.5%	-7.7%	-8.8%

Milk Sizing/Packaging





% Volume Chg vs Yago							
Latest 52 Wks	**-0.3%**	-2.2%	4.2%	1.0%	10.4%	-0.5%	-0.3%
2026YTD (9-06)	**-0.4%**	-2.3%	2.3%	1.1%	12.5%	-1.6%	0.7%
Latest 4 wks	**-0.5%**	-3.6%	3.4%	1.9%	25.0%	-2.0%	0.0%

Milk – Branded and Private Label Trends

	52 Wks -- Volume % Chg -- vs Yago				----- 52 Wks end 9-06-26 -----			
	Vol. Share	Latest 52 Wks	2026 YTD	Latest 4 Wks	% Hhlds Buy	Chg Yago	Vol/ Buyer	% Chg Yago
TOTAL U.S.	**100.0%**	**-0.3%**	**-0.4%**	**-0.5%**	**91.4**	**-0.1 pts**	**29.7 gal**	**+0.3%**
Private Label	73.6%	-0.6%	-0.7%	-0.7%	82.4	-0.2 pts	24.9	-0.1%
Branded	26.4%	0.4%	0.5%	0.3%	68.5	-0.7 pts	9.7	+2.7%

TOTAL U.S. MILK SNAPSHOT

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

Non-Dairy Milk Alternatives Volume Trend

-- % Chg vs Yago --

	52 Wks Volume (M gal)	52 Wks Vol Share	Latest 52 Wks	2026YTD (9-06)	Latest 4 Wks
TOTAL Non-Dairy	**349.7**	**100.0%**	**-5.2%**	**-5.4%**	**-6.9%**
Plant-based Alts	**345.1**	**98.7%**	**-5.3%**	**-5.6%**	**-7.6%**
Almond	211.6	60.5%	-8.7%	-9.3%	-10.4%
Oat	65.7	18.8%	-1.2%	-3.1%	-7.0%
Coconut	30.5	8.7%	-0.5%	-1.3%	-4.3%
Soy	28.7	8.2%	8.1%	14.1%	6.6%
Pea	4.1	1.2%	4.5%	7.0%	17.8%
Rice	1.3	0.4%	-15.0%	-14.5%	-13.2%
Cashew	0.8	0.2%	-39.1%	-41.4%	-48.4%
Horchata	1.4	0.4%	1.9%	3.2%	6.5%
All Other	3.7	1.1%	15.2%	21.7%	74.5%
Goat Milk	**1.8**	**0.5%**	**-2.6%**	**-2.3%**	**-0.6%**

Alternatives Pricing Trend

-- Avg Price/Gal-- -- % Chg vs Yago --

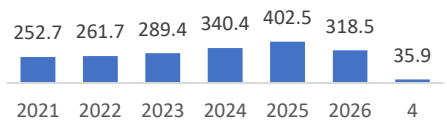
	Latest 52 Wks	2026YTD (9-06)	Latest 4 Wks	Latest 52 Wks	2026YTD (9-06)	Latest 4 Wks
TOTAL Non-Dairy	**$9.02**	**$9.05**	**$9.18**	**4.0%**	**4.0%**	**4.6%**
Plant-based Alts	**$8.87**	**$8.89**	**$9.01**	**3.9%**	**3.9%**	**4.4%**
Almond	$7.24	$7.24	$7.34	3.3%	3.1%	2.8%
Oat	$10.20	$10.21	$10.17	0.0%	0.7%	0.7%
Coconut	$16.56	$16.63	$16.98	5.3%	6.1%	7.9%
Soy	$8.56	$8.68	$9.08	4.5%	3.7%	10.9%
Pea	$13.47	$13.42	$13.13	-0.4%	-1.3%	-5.2%
Rice	$11.17	$11.32	$11.41	3.8%	4.0%	5.3%
Cashew	$13.56	$14.03	$14.94	15.2%	17.0%	23.4%
Horchata	$8.78	$8.75	$8.66	1.4%	0.2%	-3.1%
All Other	$15.25	$15.18	$14.13	-3.6%	-4.9%	-9.5%
Goat Milk	$27.28	$27.44	$27.33	6.7%	6.8%	1.7%

E-Commerce Sales Trend



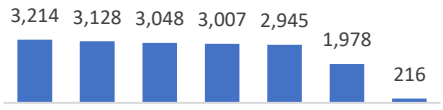
e-Commerce Dairy Milk
52 Wk Volume: 451M Gal
Volume Share
E-Commerce: 13.5%
Brick & Mortar: 86.5%

E-Commerce Milk Volume, Mil Gallons



	2021	2022	2023	2024	2025	2026 YTD	4 Wks
% chg	3.6%	10.6%	17.6%	18.2%	17.9%	18.1%	

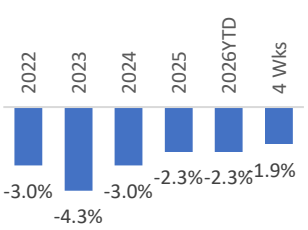
Brick & Mortar Milk Volume, Mil Gallons



	2021	2022	2023	2024	2025	2026 YTD	4 Wks
% chg	-2.7%	-2.6%	-1.3%	-2.1%	-2.5%	-2.6%	

RTE Cereal Trend

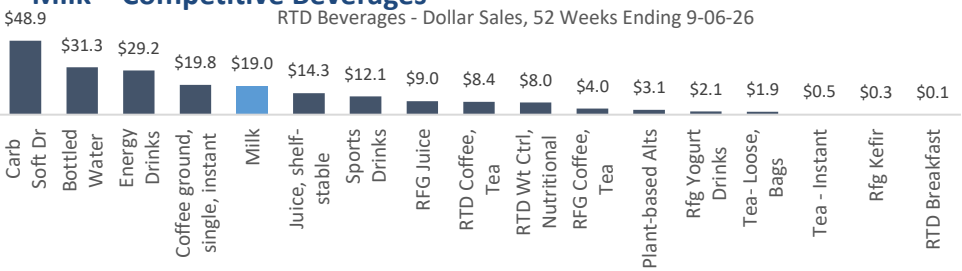
Volume % Chg vs Yago



Latest 4 wks through 9-06-26
Avg price: +2.1% vs year ago.

Milk – Competitive Beverages

RTD Beverages - Dollar Sales, 52 Weeks Ending 9-06-26



Vol. % Chg vs Yago	Carb Soft Dr	Bottled Water	Energy Drinks	Coffee ground, single, instant	Milk	Juice, shelf-stable	Sports Drinks	RFG Juice	RTD Coffee, Tea	RTD Wt Ctrl, Nutritional	RFG Coffee, Tea	Plant-based Alts	Rfg Yogurt Drinks	Tea - Loose, Bags	Tea - Instant	Rfg Kefir	RTD Breakfast
52 Wks	0.2%	1.6%	10.5%	-2.2%	-0.3%	-3.0%	4.4%	-0.9%	-3.0%	7.6%	2.7%	-5.3%	13.0%	-4.5%	-3.8%	25.0%	2.7%
2026YTD	0.7%	2.1%	10.3%	-2.2%	-0.4%	-3.2%	5.7%	0.7%	-2.5%	6.4%	2.8%	-5.6%	13.0%	-4.7%	-4.3%	24.2%	0.7%
Latest 4 wks	1.5%	3.7%	11.5%	-1.1%	-0.5%	-1.8%	9.7%	1.2%	-2.2%	6.1%	3.8%	-7.6%	13.3%	-5.0%	-9.7%	20.7%	-1.1%

New Product Spotlight



USA (Sep '26)
Nurri
Ultrafiltered protein milk. Lactose-free. 20g protein and 4g sugar per serving



USA (Aug '26)
DFA **Kemps** Protein+ ultrafiltered milk. 13g protein, 10% more %DV vs. regular milk - 50% less sugar than regular milk - Lactose free.



GERMANY (Sep '26)
Dr Oetker
Banana and chocolate drinks. Contains vitamin B12, which contributes to normal energy metabolism.



SOUTH AFRICA (Jul '26)
Protein Factory
Guilt-free gourmet. Banana crème flavored milkshake with 25g protein & no added sugar. Dessert reimagined!

Source: Innova