TOTAL DAIRY RETAIL SNAPSHOT

2025 Year-end and 4 Weeks Ending 12-28-2025



DAIRY CLOSED OUT 2025 WITH DOLLAR AND UNIT GAINS

Total retail dairy sales closed 2025 with solid momentum, driven by a **2% increase** in unit sales for the full year and 1.8% growth in the latest four weeks. **Inflation continued to ease** in December, with dairy prices down 0.9% year-over-year, according to the Consumer Price Index. Butter benefitted from this pricing relief, as average butter/butter blend prices ran 7% below 2025 in December, stimulating strong holiday demand. Butter retail volume was nearly 50% higher in December than the average four-week period, contributing to a modest gain of 1.4% compared to 2024. Whipping cream, another seasonal category, posted a 2% year-over-year volume increase in December.

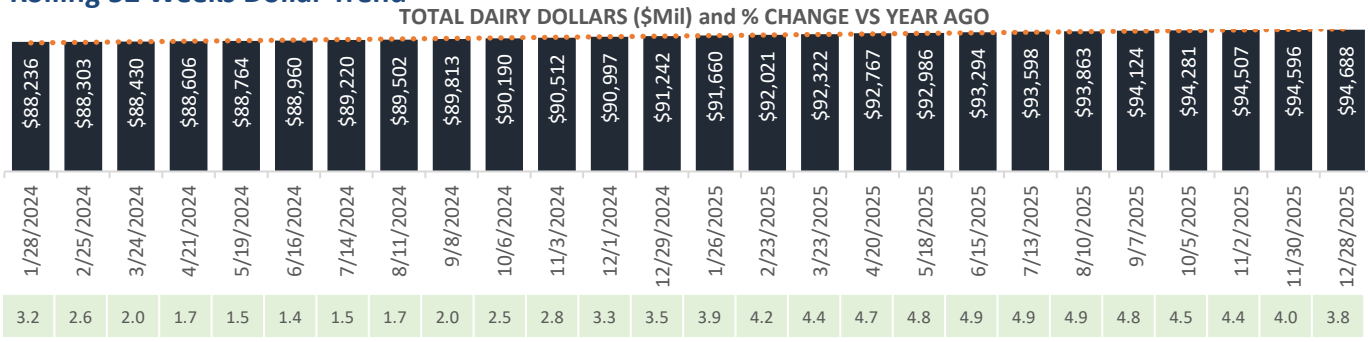
Yogurt was the standout growth driver in 2025, delivering the largest gains. The category accounted for 43% of total dairy dollar growth and 55% of unit growth. Greek yogurt fueled much of this expansion by tapping into consumer demand for high-protein, lower-sugar, better-for-you breakfast and snack options.

Cottage cheese also contributed meaningfully, delivering 14% annual volume growth and 13% growth in December. The category has been reenergized as a high-protein, nutrient-dense option aligned with modern eating behaviors, with social media repositioning it as a versatile, contemporary staple that is attracting new buyers.

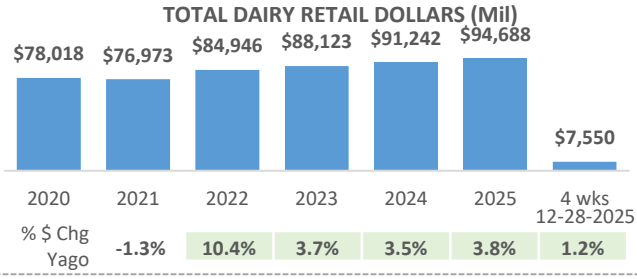
All regions recorded growth in dairy. Cheese, yogurt, butter, cottage cheese, and creamers delivered volume gains across all regions, while milk declined modestly (less than 1%). Ice cream experienced a broader downturn, with volumes falling 2-3% across regions.

Looking ahead, dairy performance will continue to be driven by growth in the largest categories alongside accelerating momentum in protein-forward and functional segments that align with evolving health and wellness priorities.

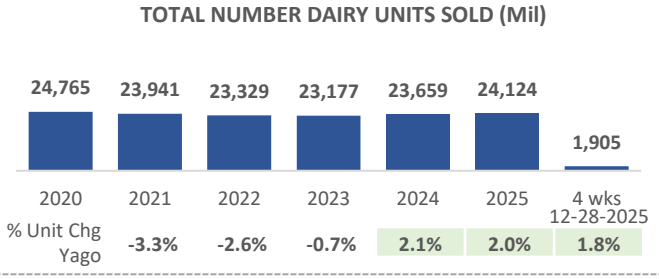
Rolling 52 Weeks Dollar Trend



Calendar Year Dollar Trend



Calendar Year Unit Trend



Purchase Dynamics, 52 Weeks ending 12-28-2025

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%	0.2	42.5 lbs	0.7	29.3	1.9	1.5	-0.3
Cow's Milk	91.6%	0.0	29.8 gal	0.8	30.3	2.3	1.0	-0.9
Yogurt	83.8%	1.1	42.1 pints	7.9	17.3	8.1	2.4	1.8
Ice Cream, Sherbet	81.2%	-1.0	41.8 pints	-0.2	10.4	1.6	4.0	-2.4
Butter, Blends	78.0%	1.1	12.6 lbs	1.1	8.0	3.6	1.6	-0.3
Frozen Novelties	77.7%	-0.3	23.1 16 oz pkg	1.8	9.8	2.0	2.4	0.0
Sour Cream	71.9%	-0.1	8.2 pints	1.0	7.0	0.9	1.2	0.5
Dairy Whipping Cream	61.6%	0.5	9.2 pints	3.4	6.2	4.2	1.5	0.7
Cottage Cheese	48.2%	2.7	12.3 pints	8.3	7.3	14.7	1.7	0.6
Dairy H+H, Lt/Reg Cream	32.6%	-0.6	22.8 pints	3.1	8.8	0.5	2.6	1.3
Dairy Creamer	19.6%	3.8	15.4 pints	5.5	6.4	32.8	2.4	-0.8
Dairy Cream Spreads	1.1%	-0.1	3.7 pints	22.4	3.8	14.9	1.0	-0.9

TOTAL DAIRY RETAIL SNAPSHOT

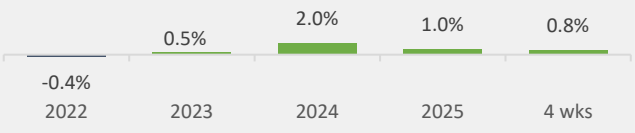
2025 Year-end and 4 Weeks Ending 12-28-2025

Product Volume % Change vs Year Ago and 52 Week $ Share of Total Dairy Categories

$ Share of dairy 33.1%

CHEESE with Random Weight

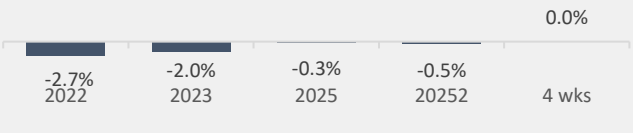




19.7% share

COW'S MILK

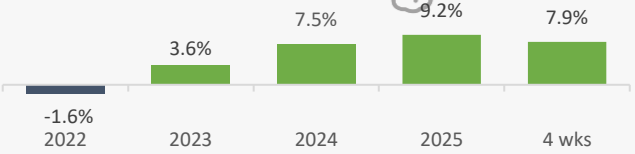




13.4% share

DAIRY YOGURT

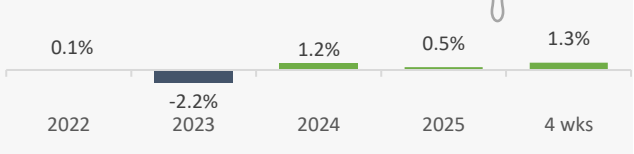




9.5% share

FZ NOVELTIES, ICE CREAM DESSERTS

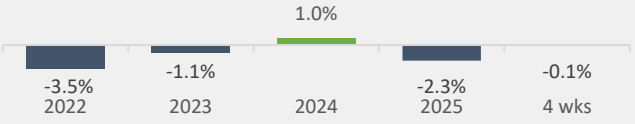




9.3% share

ICE CREAM, SHERBET

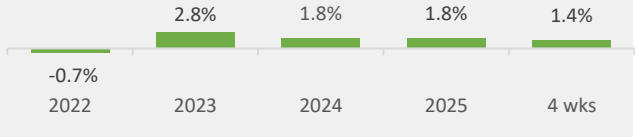




6.3% share

BUTTER, BUTTER BLENDS

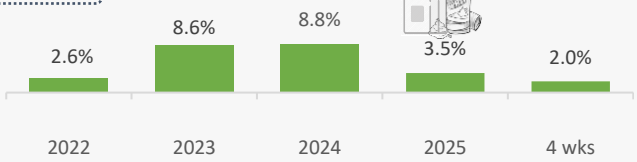




2.7% share

DAIRY WHIPPING CREAM

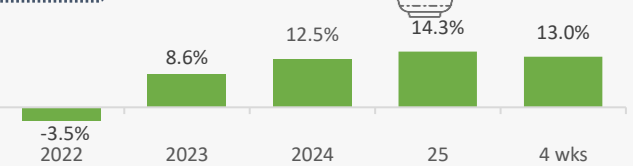




2.2% share

COTTAGE CHEESE

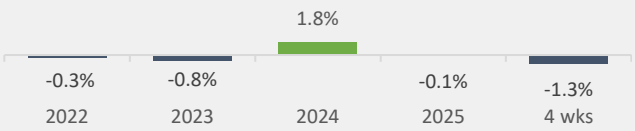




2.1% share

SOUR CREAM

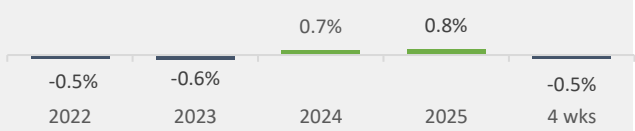




1.8% share

DAIRY HALF & HALF, LT/REG CREAM





1.2% share

DAIRY CREAMER



4 weeks ending 12-28-25

0.03% share

DAIRY CREAM SPREADS



4 weeks ending 12-28-25

TOTAL DAIRY RETAIL SNAPSHOT

2025 Year-end and 4 Weeks Ending 12-28-2025

Retail Pricing

Average Price per Vol. Equivalent

Category	52 Wks	2025YTD	4 wks
Cheese incl random wt (price/lb)*	$5.60	$5.54	$5.57
Cow's Milk (price/gal)	$5.29	$5.42	$5.51
White Conventional Gallon-size	$3.55	$3.51	$3.52
Yogurt (price/pint)	$2.92	$2.99	$2.99
Ice Cream, Sherbet (price/pint)	$2.00	$2.01	$2.00
Fz Novelties (price 16 oz pkg)	$3.84	$4.08	$4.12
Butter/Blends (price/lb)	$4.82	$4.55	$4.43
Dairy Whip Cream, liquid/aerosol (prc/pint)	$3.61	$3.55	$3.49
Sour Cream (price/pint)	$2.62	$2.60	$2.58
Dairy Half & Half, Lt/Reg Cream (prc/pint)	$1.80	$1.79	$1.78
Cottage Cheese (price/pint)	$2.73	$2.77	$2.77
Dairy Creamer (price/pint)	$2.96	$2.96	$2.97
Dairy Cream Spreads – (price/pint)	$4.41	$4.56	$4.57

*excludes vegan and imitation

% Price Change vs. Year Ago

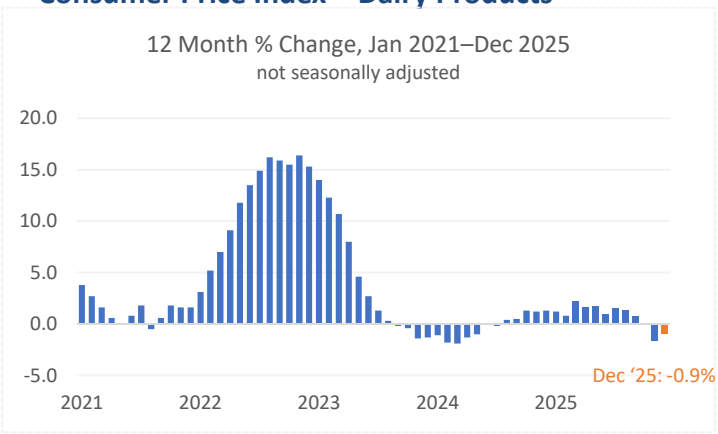
Category	52 Wks	2025YTD	4 wks
Cheese incl random wt	-0.1%	-2.0%	-2.1%
Cow's Milk	3.0%	0.4%	0.8%
Wht Conventional Gallon-size	0.1%	-4.6%	-4.1%
Dairy Yogurt	4.4%	4.6%	3.9%
Ice Cream, Sherbet	3.0%	2.8%	2.0%
Fz Novelties	3.0%	3.8%	3.2%
Butter/Blends	-0.3%	-6.2%	-7.3%
Dairy Whip Cream, liquid/aerosol	1.3%	-1.9%	-2.6%
Sour Cream	2.2%	0.6%	0.5%
Dairy Half & Half, Lt/Reg Cream	1.1%	-1.5%	-2.1%
Cottage Cheese	4.7%	3.5%	4.0%
Dairy Creamer	2.4%	0.8%	-0.8%
Dairy Cream Spreads	3.2%	4.8%	1.6%

BLS BUREAU OF LABOR STATISTICS

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

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

Consumer Price Index – Dairy Products



Note: Oct data is not available due to the 2025 lapse in appropriations

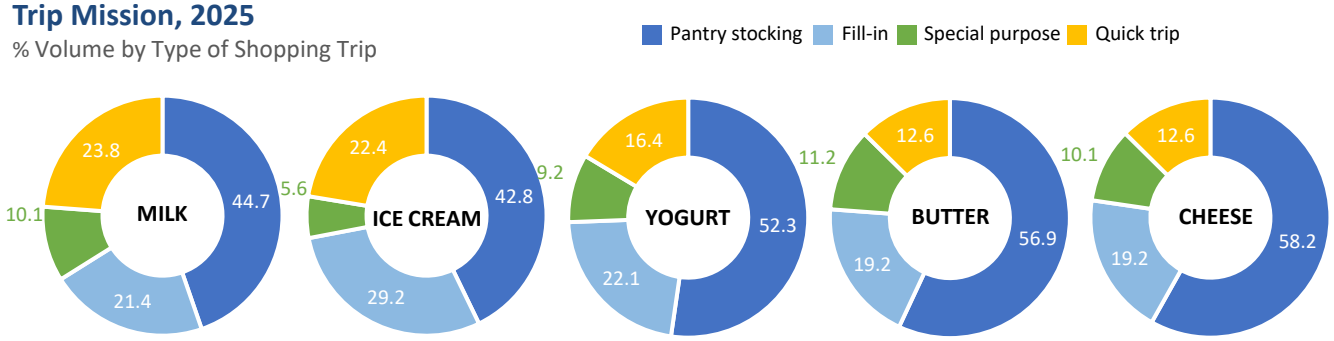
12 Month Inflation Rate, not seasonally adjusted

	All Items	Food Away	Food At-Home
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%
Aug '25	2.9%	3.9%	2.7%
Sep '25	3.0%	3.7%	2.7%
Oct '25	NA	NA	NA
Nov '25	2.7%	3.7%	1.9%
Dec '25	2.7%	4.1%	2.4%

	Dairy	Milk	Cheese	Ice Cream	Butter
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%
Aug '25	1.3%	1,7%	2.7%	-0.5%	0.1%
Sep '25	0.7%	2.1%	1.1%	-0.7%	-1.8%
Oct '25	NA	NA	NA	NA	NA
Nov 25	-1.6%	-0.8%	-2.4%	-1.7%	-4.4%
Dec 25	-0.9%	-1.0%	-1.6%	0.8%	-3.4%

Trip Mission, 2025

% Volume by Type of Shopping Trip



Source: Circana

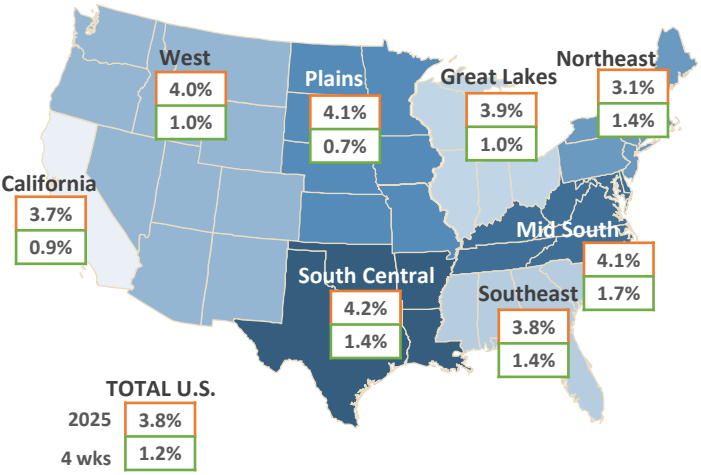
butter includes blends, cheese excludes imitation/vegan, yogurt=dairy yogurt, ice cream includes sherbet

TOTAL DAIRY RETAIL SNAPSHOT

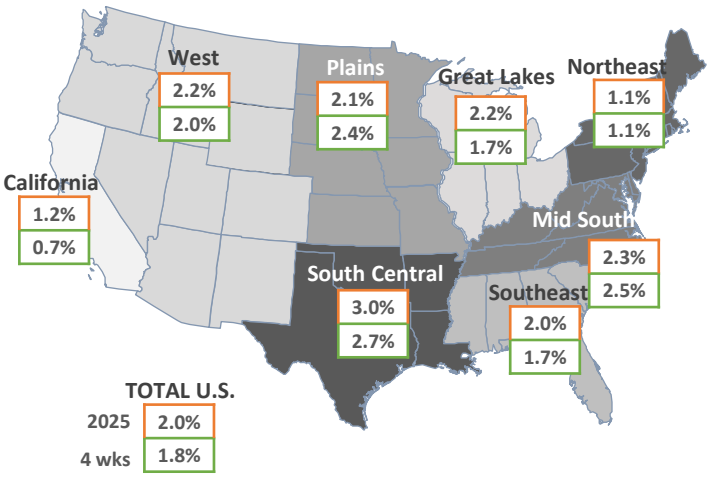
52 Weeks, 2025YTD and 4 Weeks Ending 11-30-2025

Total Dairy Category Sales View by Region

Dollar Sales % Chg vs. Year Ago



Unit Sales % Chg vs. Year Ago



2025 full year & 4 wks ending 12-28-2025. Notes: Total dairy sales are aggregated on a dollar & unit basis to equivalize 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

2025 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
TOTAL U.S.	**1.0%**	**-0.5%**	**9.2%**	**-2.3%**	**0.5%**	**1.8%**	**3.5%**	**-0.1%**	**0.8%**	**14.3%**	**29.9%**	**13.7%**
California	0.9%	-0.4%	8.0%	-3.5%	-0.8%	0.1%	-9.2%	-0.6%	1.2%	17.3%	32.8%	10.9%
Great Lakes	1.2%	-0.7%	10.4%	-1.8%	0.8%	2.0%	3.0%	-0.1%	0.4%	9.7%	34.8%	12.6%
Mid-South	1.0%	-0.3%	9.9%	-2.7%	1.1%	2.3%	10.6%	0.0%	0.1%	14.8%	26.0%	-2.5%
Northeast	0.3%	-0.8%	7.6%	-2.9%	-0.2%	2.8%	7.6%	-0.6%	-0.2%	15.7%	24.3%	-2.9%
Plains	2.0%	-0.6%	10.2%	-2.1%	1.5%	1.7%	-1.6%	0.9%	0.2%	8.8%	35.5%	4.3%
S. Central	1.2%	-0.4%	10.7%	-1.8%	0.8%	3.7%	11.2%	0.6%	4.8%	18.6%	31.2%	39.8%
Southeast	0.6%	-0.4%	9.0%	-2.0%	0.4%	0.6%	9.4%	-0.3%	1.5%	20.4%	25.8%	10.9%
West	1.7%	-0.4%	9.0%	-1.8%	0.8%	1.0%	-3.5%	0.0%	0.9%	14.9%	36.1%	1.0%

New Product Spotlight

A sampling of new dairy products launched recently



USA (Jan '26)
Kroger Simple Truth
Protein cottage cheese with strawberries or pineapple. Free from unwanted ingredients. 17g protein per serving.



USA (Jan '26)
Chobani Raspberry Rose coffee creamer with real cream.



USA (Jan '26)
Lifeway Foods
Kefir butter with honey. Probiotic cultures, European-style.



USA (Jan '26)
Horizon Organic
Real dairy creamers in vanilla, chantilly and caramel.



USA (Jan '26)
Javvy Protein creamer with bovine collagen. Prebiotics and MCTs. Support healthy hair,, skin, nails, and joints. Supports cognitive function and mental clarity.



USA (Jan '26)
Blue Bell Pro
High protein frozen desser line with 33-35g protein per pint. Contains skim milk and milk protein concentrate.

Source: Innova