

Report Price: £3254.83 | \$4395.00 | €3662.99

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.



"With sales of \$23.6 billion, the cheese category's true challenge is in growing off of such a considerable sales base, since consumers already widely turn to cheese either as a snack or a recipe component."

- William Roberts, Jr, Senior Food & Drink Analyst

This report looks at the following areas:

- Slight annual growth expected
- Consumers avoiding processed
- Usage largely confined to only a few varieties

Recent years of dollar sales stagnation have been largely the result of commodity price fluctuations, but the opportunity for growing the category could well come in the form of assuring consumers that cheese is not only a component of a healthy diet but can be integral as well.

BUY THIS REPORT NOW

VISIT: store.mintel.com

CALL:EMEA
+44 (0) 20 7606 4533

Brazil 0800 095 9094

Americas +1 (312) 943 5250

China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100

EMAIL: reports@mintel.com

DID YOU KNOW?

This report is part of a series of reports, produced to provide you with a more holistic view of this market



Report Price: £3254.83 | \$4395.00 | €3662.99

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Table of Contents

Overview

What you need to know

Definition

Executive Summary

The issues

Slight annual growth expected

Figure 1: Total US sales and fan chart forecast of cheese, at current prices, 2013-23

Consumers avoiding processed

Usage largely confined to only a few varieties

Figure 2: Consumption of cheese varieties, July 2018

The opportunities

Increasing awareness of cheese's healthy attributes

Figure 3: Healthy reasons for cheese consumption, by age, July 2018

Specialty cheese options for on-the-go usage

Figure 4: Cheese use opinions, July 2018

Capitalizing on cheese's role as a healthy indulgence

Figure 5: Health and cheese, July 2018

What it means

The Market - What You Need to Know

Slight growth reflects largely mature category

Natural options dominate

Cheese in a healthy snack

Market Size and Forecast

Slight annual growth expected

Figure 6: Total US sales and fan chart forecast of cheese, at current prices, 2013-23

Figure 7: Total US sales and forecast of market, at current prices, 2013-23

Market Breakdown

Natural options dominate market

Figure 8: Sales of cheese, by segment, in billions, 2018 (est)

Figure 9: Sales of cheese, by segment, 2013-23

Supermarket dominance could shift

Figure 10: Total US retail sales of cheese, by channel, at current prices, 2013-18

Market Factors

Impact of dairy commodity prices

Figure 11: Natural cheese MULO sales growth, dollar sales versus volume sales, 2014-18*

BUY THIS REPORT NOW VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | China +86 (21) 6032 7300



Report Price: £3254.83 | \$4395.00 | €3662.99

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Natural perceived as healthier

Figure 12: Description of natural/organic, April 2017

Leveraging cheese's healthy attributes

Figure 13: Snacking frequency, March 2017

Key Players - What You Need to Know

Brand factors more outside of natural cheese

Added health, added appeal

Challenges for processed cheese

Improving dairy-free cheeses requires flavor innovation, lower price

Company and Brand Sales of Cheese

Private label dominates market share

Sales of cheese by company

Figure 14: Sales of cheese, by company, 2017 and 2018

What's Working?

Healthy but at a cost

Figure 15: Natural cheese introductions, 2017-18

What's Struggling?

Processed sales slump

Figure 16: Processed cheese introductions, 2017-18

What's Next?

Plant-based potential

Figure 17: Plant-based cheese introductions, 2017-18

Figure 18: Product attributes, select plant-based cheese launches, 2017-18

Naturally avoiding GMOs

Figure 19: GMO-free claims on cheese introductions, 2013-18

Farm-to-fork becomes lab-to-plate

The Consumer - What You Need to Know

Growth demands increasing frequency

Younger consumers embrace wider variety of cheeses

Highlight cheese's healthy details

Leveraging cheese's versatility

Moving cheese beyond sandwiches

Young consumers shopping around at non-supermarket channels

Brands resonate with Hispanic consumers

No need for natural claims

Cheese Consumption

Natural cheese usage widespread

BUY THIS REPORT NOW **VISIT:** store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094 Americas +1 (312) 943 5250 | China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100

EMAIL: reports@mintel.com



Report Price: £3254.83 | \$4395.00 | €3662.99

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Figure 20: Cheese consumption, July 2018

Dairy-free and processed cheese of significantly greater interest to younger consumers

Figure 21: Cheese consumption, by age, July 2018

Six in 10 dairy-free cheese consumers eat it at least weekly

Figure 22: Cheese consumption frequency, July 2018

Consumption of Cheese Varieties

Cheddar, mozzarella, Parmesan are most popular varieties

Figure 23: Consumption of cheese varieties, July 2018

Younger consumers eating a variety of cheese types

Figure 24: Consumption of cheese varieties, by age, July 2018

Figure 25: Kraft Expertly Paired cheeses, 2018

Versatility's appeal

Figure 26: Reasons for eating cheese, by consumption of cheese varieties, July 2018

Reasons for Consumption

Taste tops reasons for cheese consumption

Figure 27: Reasons for cheese consumption, July 2018

Parents like cheese's versatility, snackability

Figure 28: Reasons for cheese consumption, by gender and parental status, July 2018

Nutrition Driven Reasons for Consumption

Possible lack of awareness of cheese's healthy attributes among younger consumers

Figure 29: Healthy reasons for cheese consumption, by age, July 2018

Uses Other Than a Snack

Sandwich usage most widespread application for cheese

Figure 30: Non-snack cheese usage, July 2018

Purchase Location

Most consumers purchase at supermarkets

Figure 31: Purchase location, July 2018

Younger consumers purchase from a variety of retailers

Figure 32: Purchase location, by age, July 2018

Purchase Factors

Resealable packaging resonates

Figure 33: Purchase factors, July 2018

Hispanic consumers drawn to brand

Figure 34: Purchase factors, by Hispanic origin, July 2018

Packaging with flavor and brand power

Figure 35: TURF analysis, purchase factors, July 2018

Natural Claims on Consumption

BUY THIS REPORT NOW VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094 Americas +1 (312) 943 5250 | China +86 (21) 6032 7300



Report Price: £3254.83 | \$4395.00 | €3662.99

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Natural resonates even over healthy attributes

Figure 36: Healthy purchase factors, July 2018

Figure 37: Purchase considerations, by cheese consumption frequency, July 2018

Health Opinions and Cheese

Healthy indulgence to increase consumption

Figure 38: Health and cheese, July 2018

Organic claims could lure younger consumers

Figure 39: Health and cheese, by age, July 2018

Hispanics, especially Millennials, express health-related concerns about cheese

Figure 40: Health and cheese, by Hispanic origin, July 2018

Opinions about Cheese Consumption

Consumer interest in new cheese options, on-the-go usage

Figure 41: Cheese use opinions, July 2018

Free-range resonating much more strongly among younger consumers

Figure 42: Cheese use opinions, by age and gender, July 2018

Appendix - Data Sources and Abbreviations

Data sources

Sales data

Fan chart forecast

Consumer survey data

Abbreviations

Abbreviations

Appendix - The Market

Figure 43: Total US sales and forecast of cheese, at inflation-adjusted prices, 2013-23

Figure 44: Total US retail sales of cheese, by segment, at current prices, 2016 and 2018

Figure 45: Total US retail sales and forecast of natural cheese, at current prices, 2013-23

Figure 46: Total US retail sales and forecast of natural cheese, at inflation-adjusted prices, 2013-23

Figure 47: Total US retail sales and forecast of processed cheese, at current prices, 2013-23

Figure 48: Total US retail sales and forecast of processed cheese, at inflation-adjusted prices, 2013-23

Figure 49: Total US retail sales and forecast of cream cheese/cream cheese spreads, at current prices, 2013-23

Figure 50: Total US retail sales and forecast of cream cheese/cream cheese spreads, at inflation-adjusted prices, 2013-23

Figure 51: Total US retail sales and forecast of cottage cheese, at current prices, 2013-23

Figure 52: Total US retail sales and forecast of cottage cheese, at inflation-adjusted prices, 2013-23

Figure 53: Total US retail sales of cheese, by channel, at current prices, 2016 and 2018

Figure 54: US supermarket sales of cheese, at current prices, 2013-18

Figure 55: US sales of cheese through other retail channels, at current prices, 2013-18

Appendix - Key Players

Figure 56: Multi-outlet sales of natural cheese, by leading companies and brands, rolling 52 weeks 2017 and 2018

BUY THIS REPORT NOW VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | China +86 (21) 6032 7300



Report Price: £3254.83 | \$4395.00 | €3662.99

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Figure 57: Multi-outlet sales of processed cheese, by leading companies and brands, rolling 52 weeks 2017 and 2018

Figure 58: Multi-outlet sales of cream cheese and cream cheese spreads, by leading companies and brands, rolling 52 weeks 2017 and 2018

Figure 59: Multi-outlet sales of cottage cheese, by leading companies and brands, rolling 52 weeks 2017 and 2018

Appendix - TURF Analysis Methodology

Figure 60: Table - TURF analysis - Purchase considerations, July 2018