

Dairy Food Trends & Opportunities



Bob Carroll

CEO

California Milk Advisory Board



Dairy Trends and Opportunities

California Milk
Advisory Board

6/23/2025



- Market Overview
- Consumer Household Dynamics
- Category Drivers
 - Milk
 - Functional Beverages
 - Yogurt
 - Cottage Cheese



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Market Overview



Milk Is Back: The Reason Why More Moms Are Returning to Dairy Milk for Their Kids

JUNE 9, 2025

written by MCKENNA PRINGLE

FOOD TECHNOLOGY MAGAZINE | MARKET TRENDS



Dairy Stages a Comeback

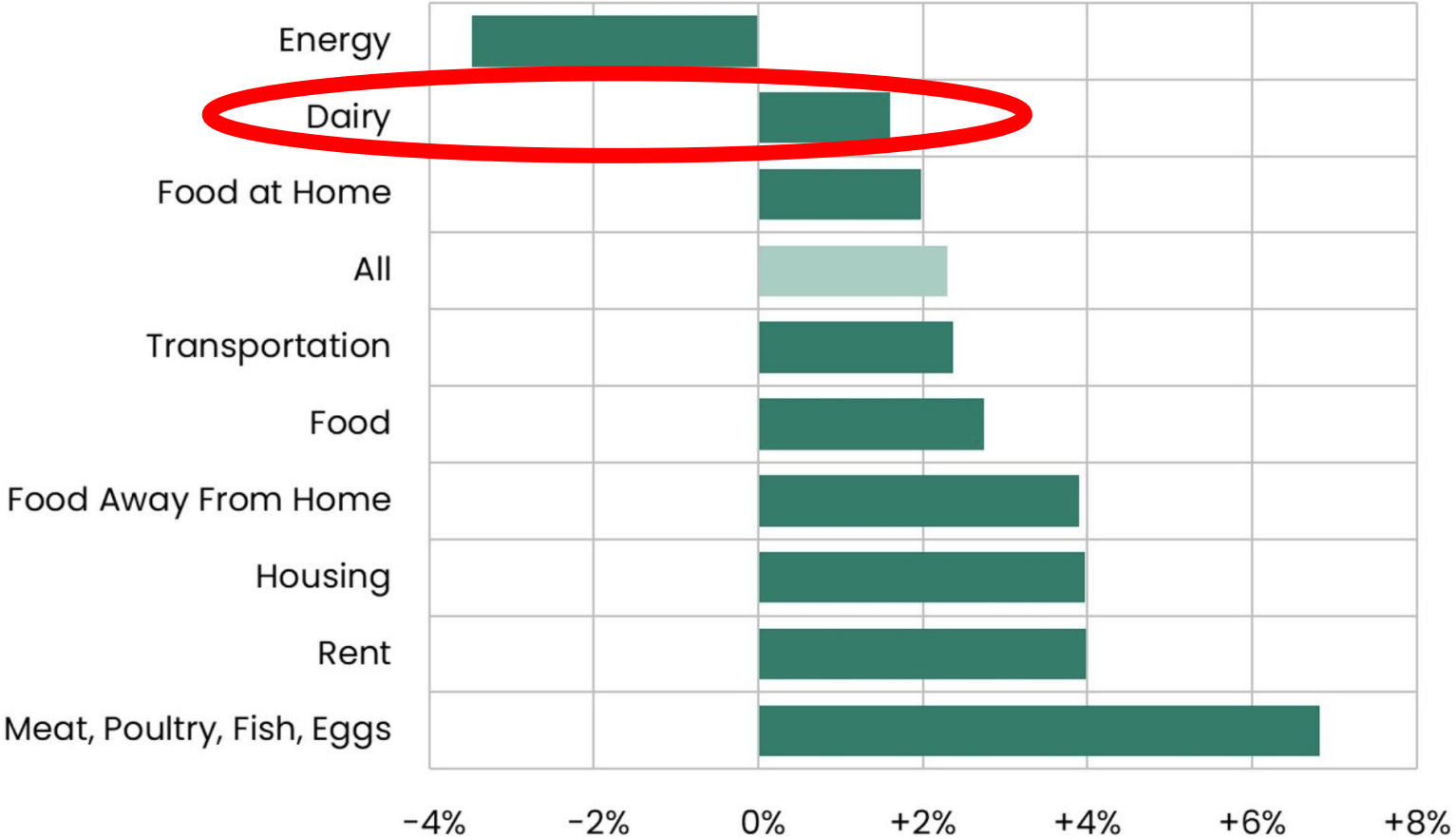
Americans consumed a record number of dairy products in 2023, signaling that there's room for both traditional products and innovative offerings within the sector.

By **Kayt Sukel**
February 7, 2025

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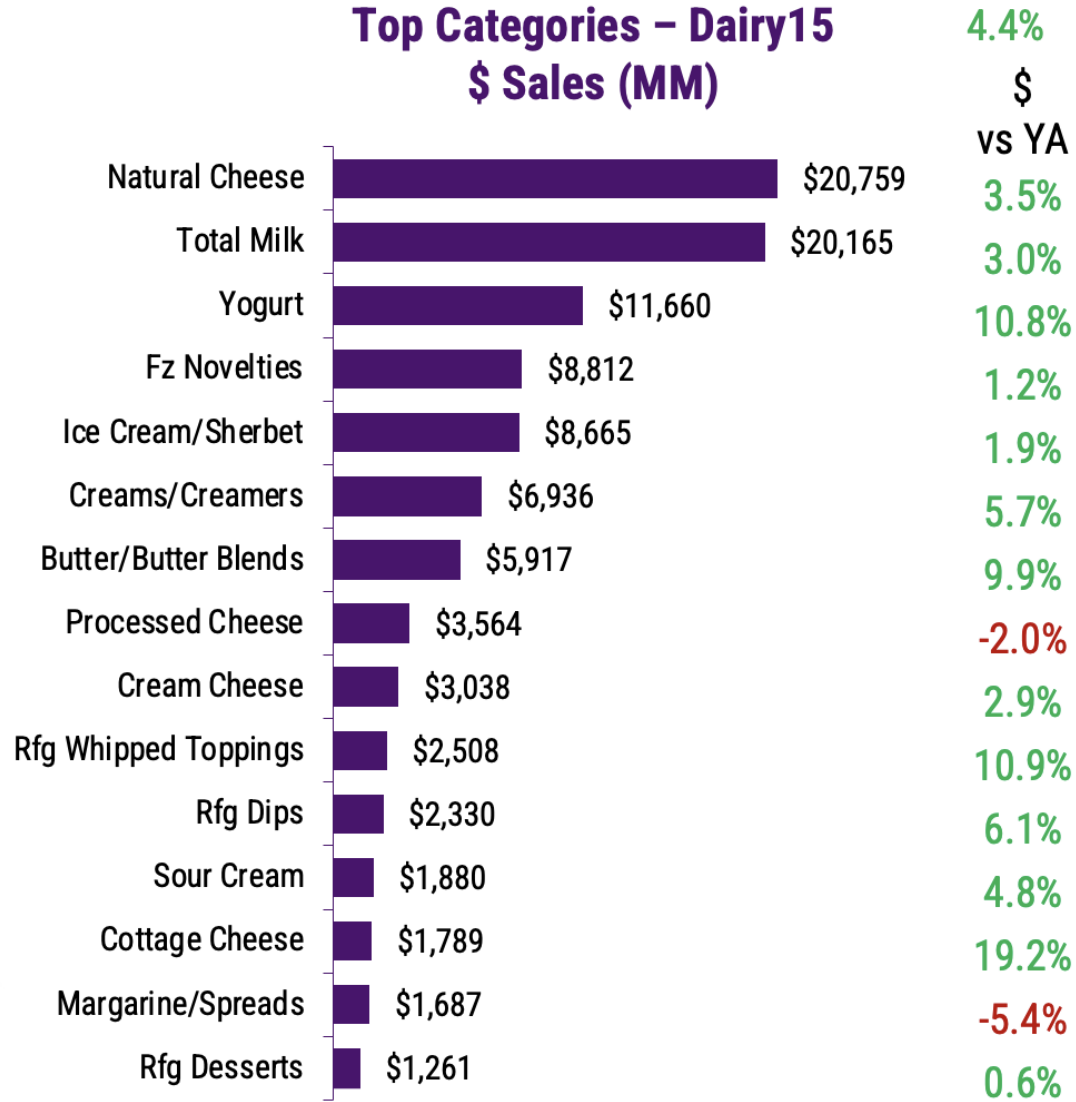
Consumer Price Index YOY Apr



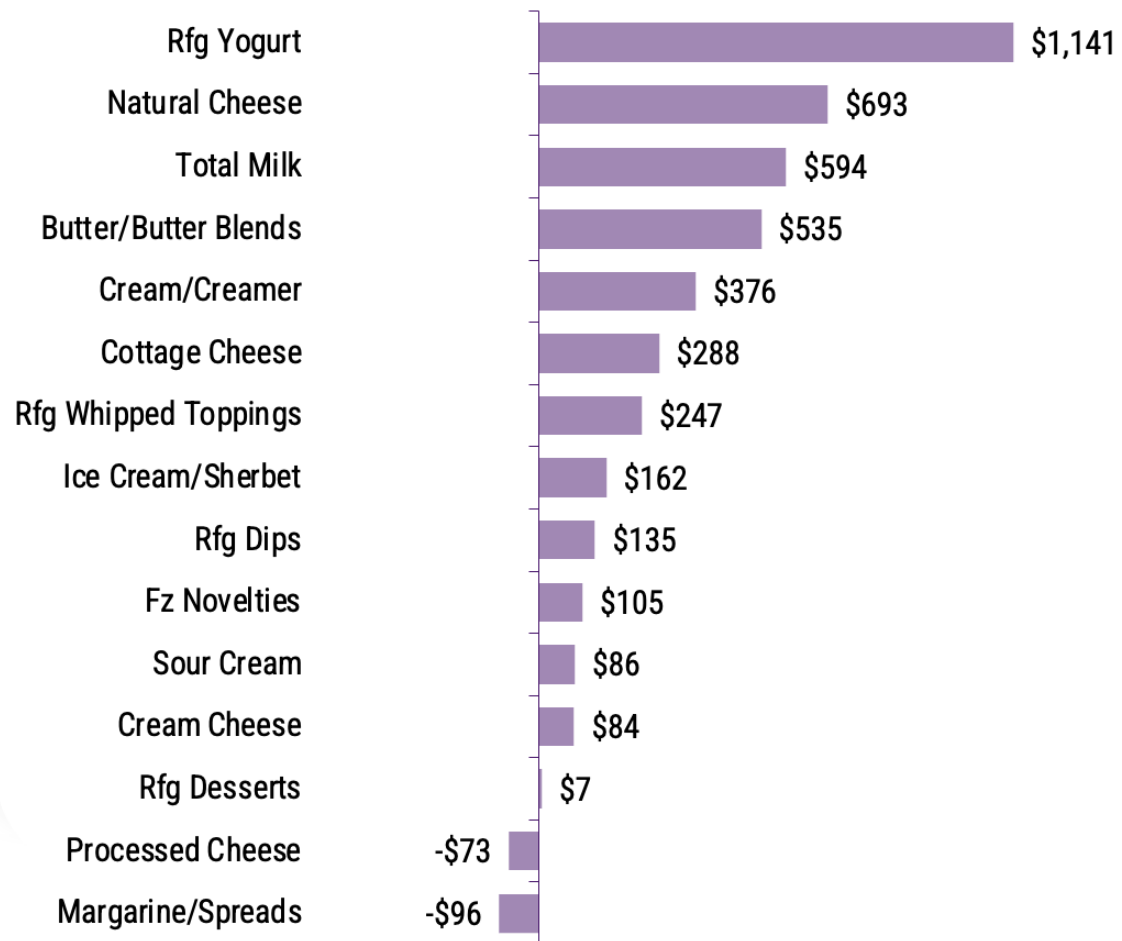
1982-1984=100; US Bureau of Labor Statistics



Top Categories – Dairy15 \$ Sales (MM)



Top Growing Categories – Dairy15 +\$4,284 \$ Sales Δ (MM)



3.2%
Price Per
Vol vs YA

1.8%

-0.1%

3.5%

6.9%

2.8%

5.0%

2.7%

1.2%

1.4%

0.6%

2.5%

2.3%

5.2%

-0.2%

-2.9%



California - Standard - Multi Outlet+ with Conv
Rolling 52 Weeks Ending 05-18-25

Product	Volume Sales (million)	Volume Sales Change vs YA (million)	Volume Sales % Change vs YA
YOGURT	461	37.2	8.8%
NATURAL CHEESE	405	10.8	2.7%
COTTAGE CHEESE	61	9.0	17.2%
ICE CREAM/SHERBET	406	5.3	1.3%
CREAMS/CREAMERS	374	4.0	1.1%
NOVELTIES - FZ	256	2.8	1.1%
SOUR CREAM	80	2.7	3.5%
DAIRY MILK	335	2.5	0.7%
WHIPPED TOPPINGS - RFG	77	1.9	2.5%
BUTTER/BUTTER BLENDS	119	1.1	1.0%



OBSERVATIONS | IMPLICATIONS

1. Winds of change are in our favor, broadly propelling dairy

- Protein
- Gut health
- Natural, not ultra-processed
- Price / Value

2. We must seize the momentum

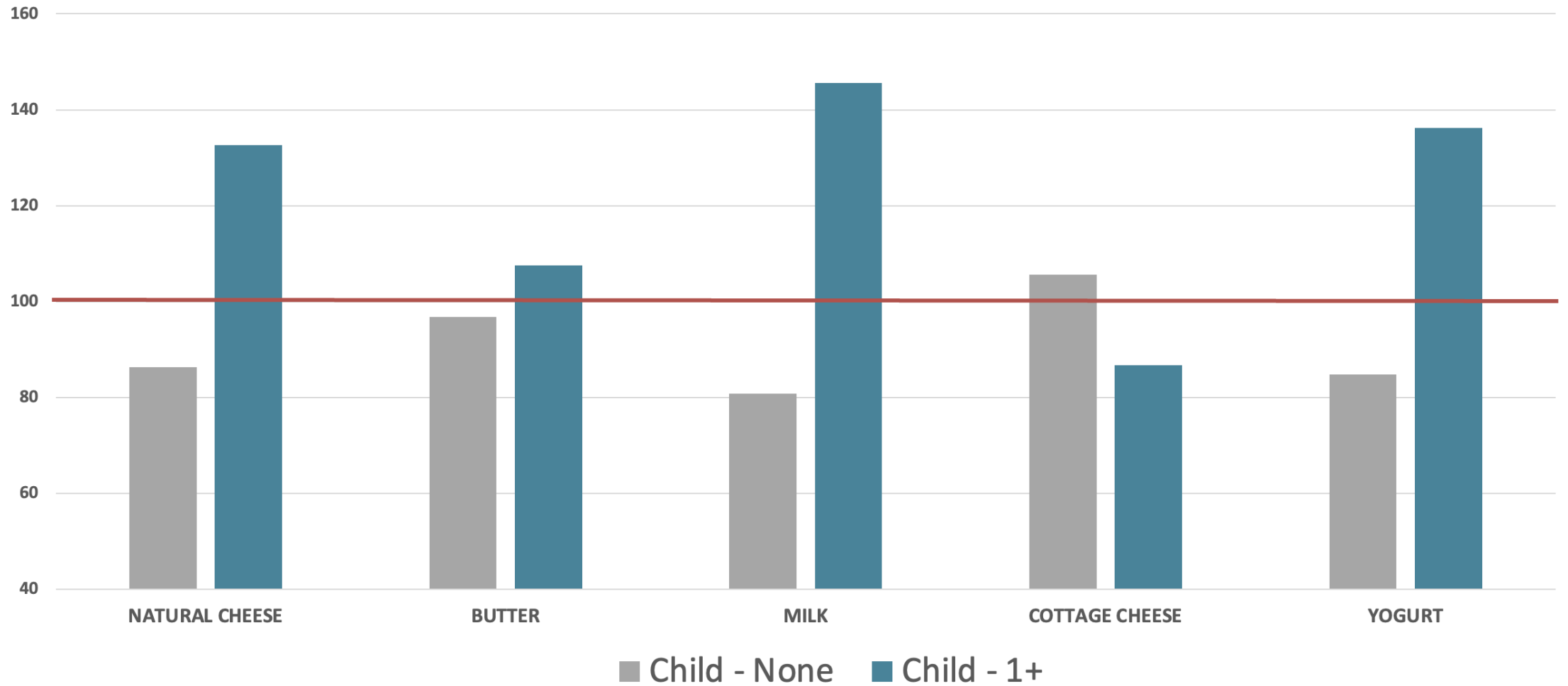
- Investment
- New products
- Simplifying ingredients



CONSUMER HOUSEHOLD DYNAMICS



Volume Index by Presence of Children - 2024

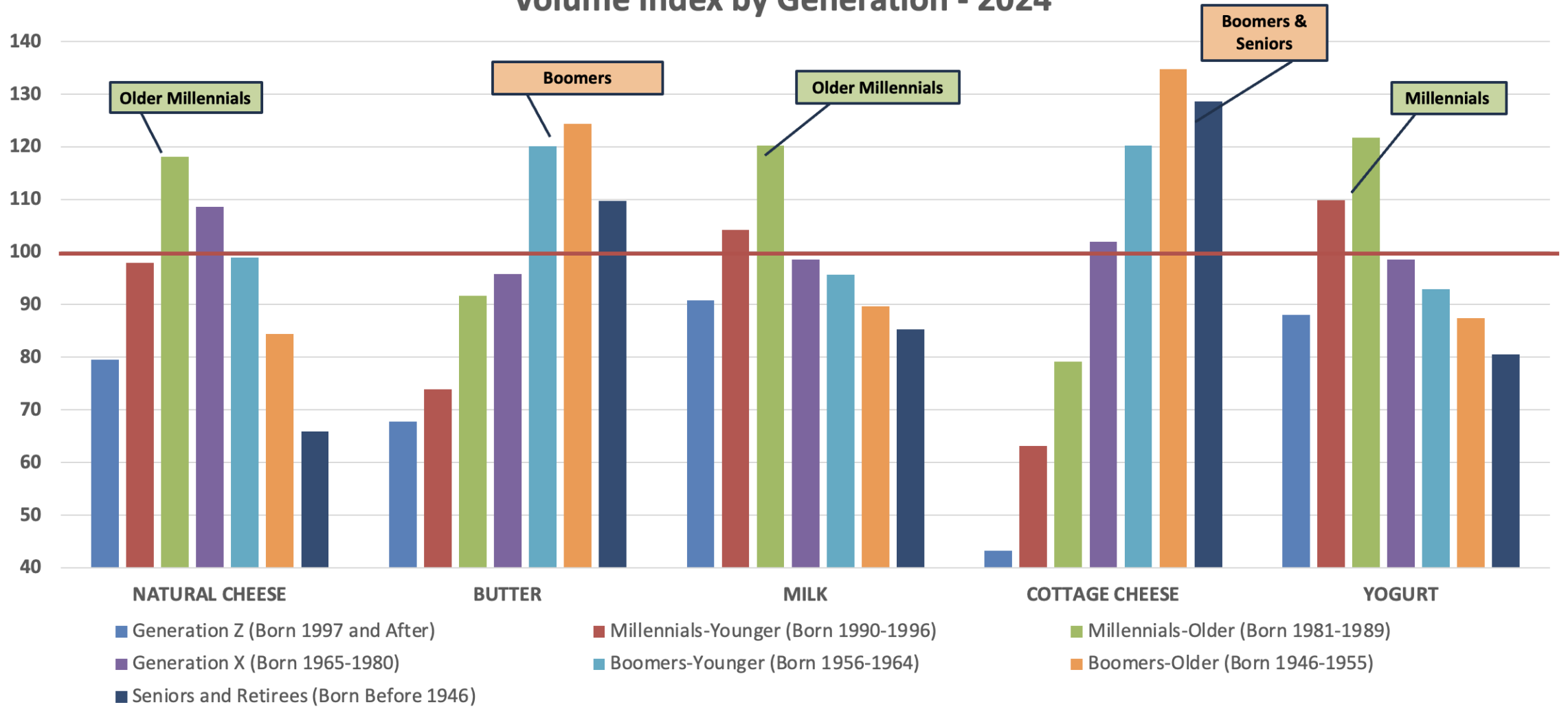


Circana, HH Panel, Total US, 2024

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Volume Index by Generation - 2024

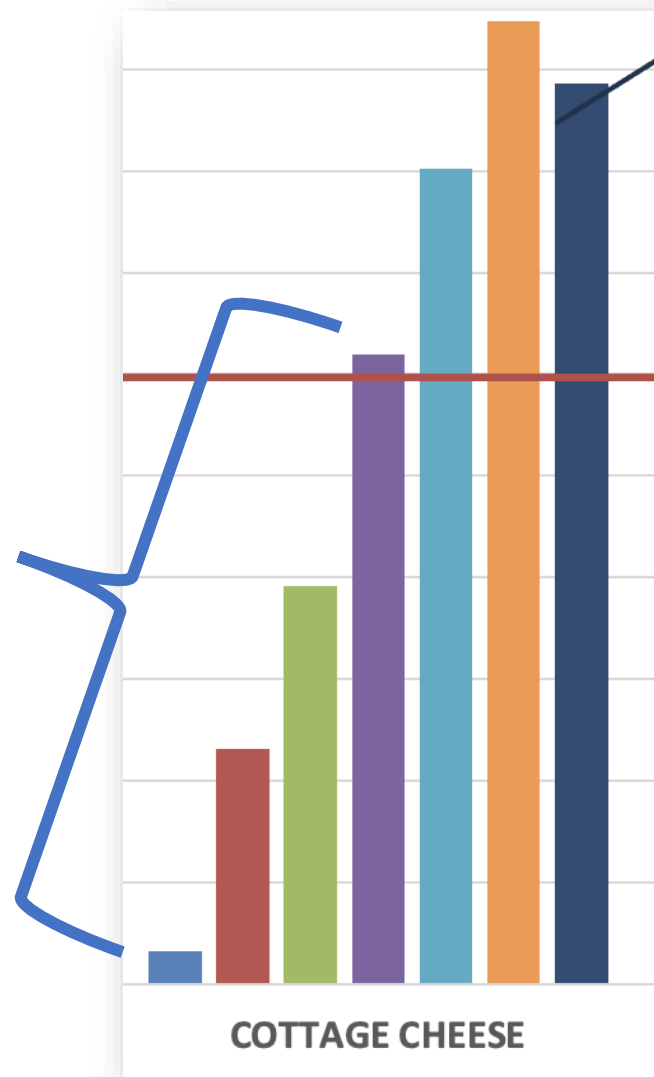


Circana, HH Panel, Total US, 2024

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+18%



Circana, HH Panel, Total US, 2024

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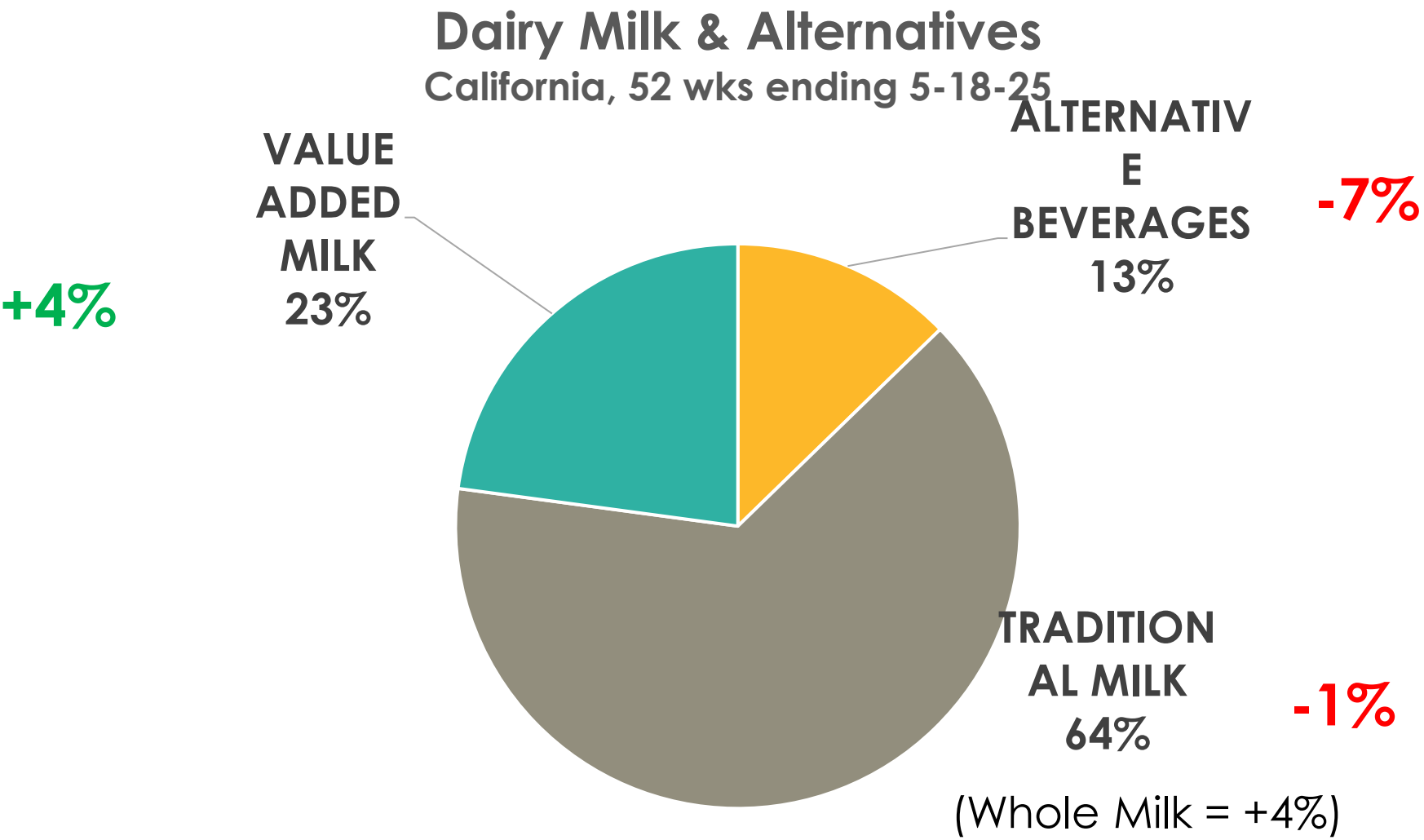


A top-down view of various dairy products arranged on a light-colored wooden surface. In the upper left, a small white bowl contains several round butter pats. Below it, a white bowl with a black rim holds two slices of Swiss cheese. To the right, a white bowl is filled with thick, swirled cream. In the lower left, a small white cup is partially filled with milk. At the bottom center, a glass bottle of milk lies horizontally. A green and white checkered cloth is visible on the far left edge.

**CATEGORY
DRIVERS:**

MILK

Value-added milk growth is especially strong in California



Top CA Growth Brands: Milk

Category - Dairy Milk

Geography :California - Standard - Multi Outlet+ with Conv

Time: Rolling 52 Weeks Ending 05-18-25

Product	Volume Sales (MM)	Volume Sales Change vs YA (MM)	Volume Sales % Change vs YA
DAIRY MILK	335.3	2.5	0.7%
FAIRLIFE	7.5	1.5	24.8%
PRIVATE LABEL	229.0	1.0	0.4%
HOOD LACTAID	18.3	0.6	3.2%
HORIZON ORGANIC GROWING YEARS	1.2	0.4	48.8%
FAIRLIFE	1.9	0.3	19.0%
ORGANIC VALLEY GRASSMILK	0.8	0.3	54.7%
A2 MILK	1.4	0.3	25.4%
CLOVER SONOMA	8.0	0.2	2.4%
PRODUCERS	4.5	0.2	4.2%
SEQUOIA FARMS	2.5	0.2	6.7%



OBSERVATIONS | IMPLICATIONS

1. Lactose free!
2. Protein!
2. Majority of the growth is ESL



**CATEGORY
DRIVERS:**

**FUNCTIONAL
BEVERAGES**



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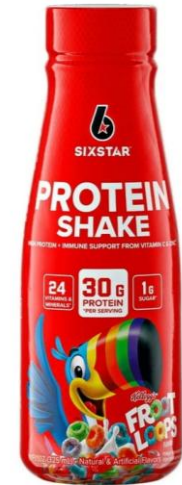
Category_Dairy Beverages Dive

Geography :Total US - Multi Outlet+ with Conv Time: Rolling 52 Weeks Ending 05-18-25

Product	Volume Sales (MM)	Volume Sales Change vs YA (MM)	Volume Sales % Change vs YA
WEIGHT CONTROL/NUTRITIONALS LIQ/PWD	348	37.1	11.9%
PREMIER PROTEIN	94	13.4	16.7%
CORE POWER	21	5.7	36.8%
CORE POWER ELITE	18	5.3	42.2%
FAIRLIFE NUTRITION PLAN	21	4.6	27.7%
NURRI	4	3.6	
OWYN	7	3.0	83.1%
ORGAIN	5	2.0	68.2%
BOOST	3	1.7	141.4%
PRIVATE LABEL	31	1.0	3.4%
ATKINS STRONG	1	0.8	



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CLEANER INGREDIENTS:
Crafted with Organic ingredients such as Grass Fed Milk Protein, Whey Protein Concentrate, and a Fruit and Vegetable blend including acai, apple, beet, blueberry, carrot, kale & spinach



Vegan



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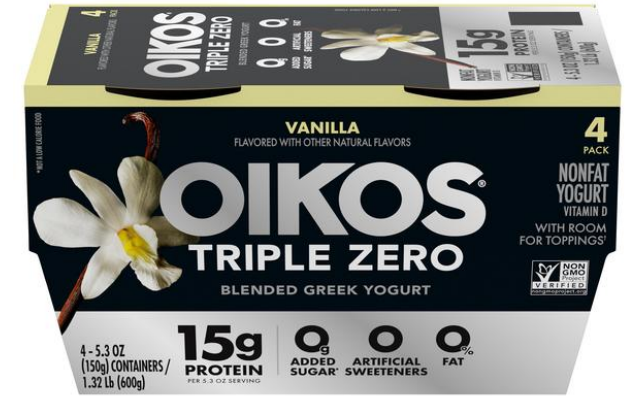
CATEGORY DRIVERS: YOGURT



Category_Yogurt

Geography :Total US - Multi Outlet+ with Conv Time: Rolling 52 Weeks Ending 05-18-25

Product	Volume Sales (MM)	Volume Sales Change vs YA (MM)	Volume Sales % Change vs YA
YOGURT	4170	349.0	9.1%
PRIVATE LABEL	783	78.1	11.1%
DANNON OIKOS TRIPLE ZERO	281	66.6	31.0%
CHOBANI	547	52.3	10.6%
FAGE TOTAL	149	27.5	22.6%
DANNON OIKOS PRO	61	22.6	59.1%
DANNON OIKOS PRO	19	18.9	10454.2%
CHOBANI COMPLETE	37	18.0	93.7%
CHOBANI	59	14.6	32.5%
CHOBANI FLIP	123	13.1	11.9%
YOPLAIT PROTEIN	15	10.8	252.0%



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Tik Tok



r/Fitness • 10 yr. ago
adamh9

Greek Yogurt for Gains.

Anyone else use this stuff? 12g of protein per cup and fairly cheap. What other cheap foods are hidden gems for protein intake you guys would recommend?

Hector_the_Collector • 10y ago

Greek Yogurt + oats + peanut butter + chia seeds + cocoa Powder + half scoop chocolate whey = delicious protein pudding. if you let the chia seeds sit for a little they form sort of a gel that has the same consistency as pudding (at least from what i remember, its been quite some time since ive had real pudding) I usually top mine with bananas and berries.

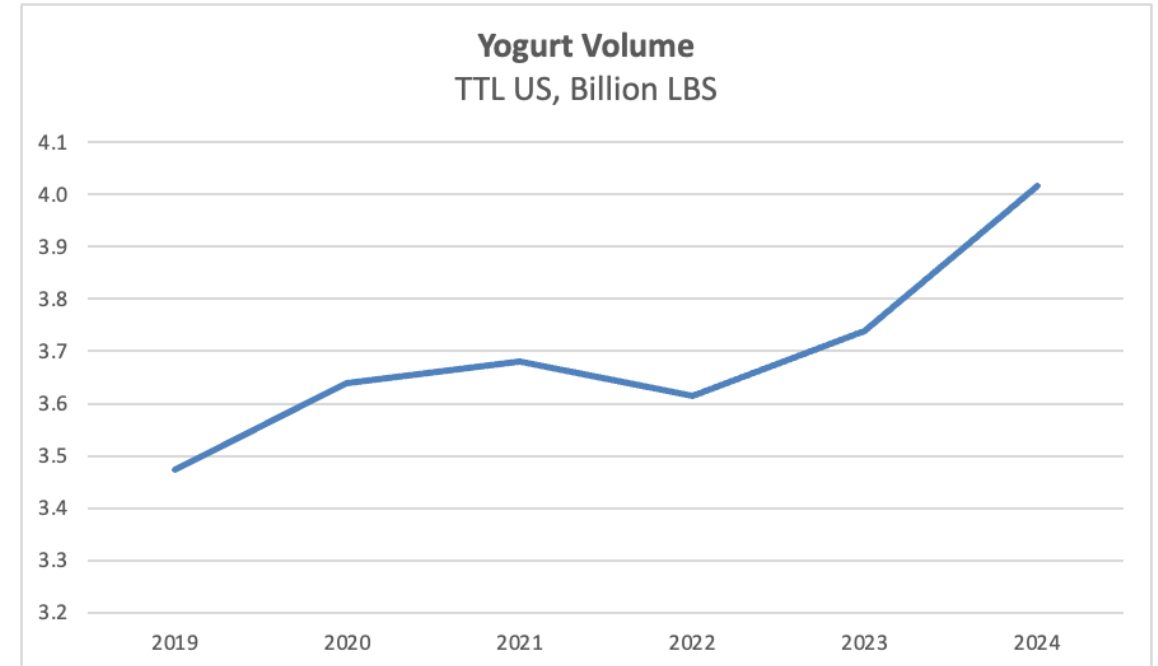
Comes out to around 60g Protein, 25g fat, 75g carbs.

plus its fairly easy to manipulate it to fit macros appropriately. If cutting reduce peanut butter and oats. Best post workout snack of all time



OBSERVATIONS | IMPLICATIONS

1. Gut health & **protein**
2. Revival again through innovation
3. All-family
4. Packaging: large sizes and multi-packs are leading



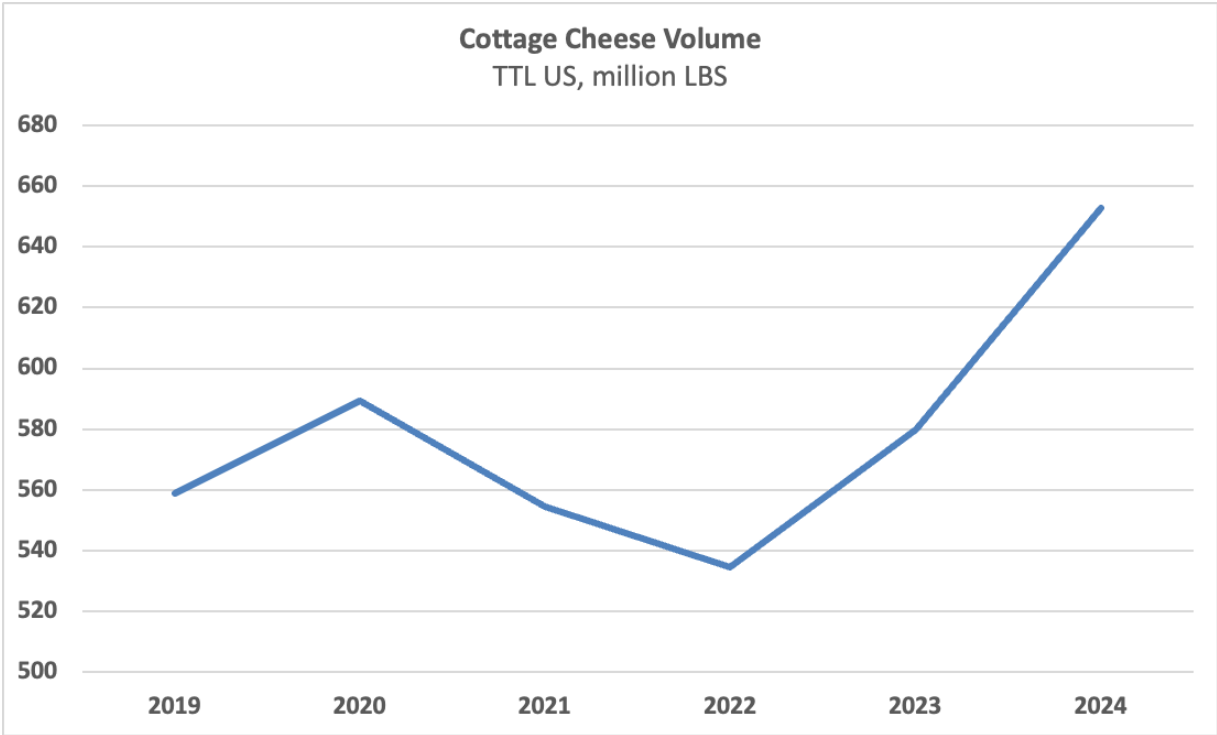


**CATEGORY
DRIVERS:**

**COTTAGE
CHEESE**

Category_Cottage Cheese
Geography :Total US - Multi Outlet+ with Conv
Time: Rolling 52 Weeks Ending 05-18-25

Product	Volume Sales (MM)	Volume Sales Change vs YA (MM)	Volume Sales % Change vs YA
COTTAGE CHEESE	696	86.3	14.2%
DAISY	127	30.1	31.0%
PRIVATE LABEL	309	18.0	6.2%
GOOD CULTURE	44	14.9	52.0%
BREAKSTONES	39	6.2	18.8%
KNUDSEN	30	4.8	18.7%
KEMPS	18	3.5	24.0%
HOOD	18	2.8	18.1%
DARIGOLD	18	2.7	17.6%
HOOD LACTAID	8	1.7	24.7%





◆ AI Overview

Cottage cheese is considered good for you because it is a high-protein food with a relatively low fat content, making it a great option for building muscle, managing weight, and supporting bone health due to its high calcium content; it also provides essential nutrients like phosphorus and potassium, while being relatively low in carbohydrates, which can help with blood sugar control. [🔗](#)

Why Good Culture and Daisy?



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TikTok has ignited a cottage cheese renaissance

By Gabriela Barkho

f X in

From a
bland diet
food for old
people



To a trendy,
versatile
ingredient for
everyone

#cottagecheese has generated well over 1 billion views

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OBSERVATIONS | IMPLICATIONS

1. The inherent goodness of dairy is shining
2. Social media has immense power to shape trends
3. Clean ingredient statements should be a priority



THANK YOU



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Presenting



LOOK FOR THE SEAL.
RealCaliforniaMilk.com



GE VERNOVA

Platinum



Hospitality



Gold



Silver



Bronze

