

CHEESE – US – 2023

Cheese remains a consumer staple due to versatility and convenience, with continued room to expand across occasions including as a protein rich, satiating snack.



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This report looks at the following areas:

- Types of cheese consumed
- Consumption changes, including reasons for eating more or less cheese
- Consumption occasions by cheese variety
- Experience and interest in cheese varieties
- Cheese attitudes and behaviors
- Launch activity, marketing and innovation
- The cheese market, forecast and key players

Overview

While dollar sales growth was mostly driven by inflation, most consumers had stable consumption habits, indicating that cheese remains a household staple. Growth in private label and more affordable segments like cream cheese does suggest some consumers did trade down, however, among those who consumed less cheese, healthfulness was more concerning than price.

Convenience and versatility are the main benefactors of the category, particularly as snacking and working habits have evolved, yet consumers have weak associations of many cheese varieties and potential occasions. Showcasing cheese's ability to work across occasions, including as a protein rich and satiating snack can continue to move the category forward and expand consumer considerations of cheese beyond sandwiches and crackers.

Younger consumers are excited by innovation, and their interest in emerging cheese types suggests that they are more open to regional and international varieties and bold and



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unexpected flavors, textures and formats. Rapid discovery on social media and via menu trends place this group at the forefront of opportunity for new products and occasions.

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Report Content

EXECUTIVE SUMMARY

- What you need to know
- Consumer trends: key takeaways
- Cheese category outlook
- Opportunities

CONSUMER INSIGHTS

Consumer fast facts

Cheese consumption by type

- Consumption across cheese types expands
 - Graph 1: trended types of cheese consumed, 2022-23
- Younger males lead dairy-alternative consumption
 - Graph 2: types of cheese consumed, by gender and age

Consumption changes

- Consumption habits are stable in the face of higher prices
 - Graph 3: consumption changes, 2023
- Casual occasions drive consumption increase
 - Graph 4: reasons for eating more cheese, 2023
- Plot twist: health wins over price
 - Graph 5: reasons for eating less cheese, 2023

Consumption occasions by cheese variety

- Cheddar is the poster child for versatility
 - Graph 6: consumption occasions by cheese variety, 2023
- Lukewarm associations leave room for expanded occasions
 - Graph 7: consumption occasions by cheese variety, heat map, 2023

Experience and interest in cheese varieties

- Large gap in awareness between mainstream and emerging cheese
 - Graph 8: experience and interest in cheese varieties, 2023
- Millennials know their cheese, help them use it
 - Graph 9: experience and interest in cheese varieties, by generation, – NET – any awareness, 2023
- Gen Z can drive trial of emerging cheese varieties

- Graph 10: experience and interest in cheese varieties, by generation, 2023 – "I haven't tried this but I am interested in trying it"

Cheese attitudes

- Consumers find value beyond brand
 - Graph 11: cheese attitudes, 2023
- Younger male consumers place a premium on exploration
 - Graph 12: cheese attitudes, by gender and age, 2023
- Bold flavor can be a variety in itself
 - Graph 13: cheese attitudes, 2023
- Help younger women discover through social occasions
 - Graph 14: cheese attitudes, by gender and age, 2023

COMPETITIVE STRATEGIES

Launch activity and innovation

- Jump on board with trendy snacking
- Bold flavors remind consumers to indulge
- Plant-based products fit in so consumers don't miss out

Marketing and advertising

- Help consumers set the scene, no matter how small
- Showcase the convenience of cheese
- Cottage cheese is having a moment

Opportunities

- Showcase the health benefits of cheese
 - Graph 15: cheese products with high/added protein claims, 2020-23
- Cottage cheese: a social media case study
- Menus as a first source of exposure

THE MARKET

Market context

Market drivers

- Consumption habits only minorly impacted by financial situation
 - Graph 16: change in cheese consumption, by financial situation, 2023
- Dairy prices follow at-home CPI food trends
 - Graph 17: % change in consumer price indexes, 2020-23

Cheese – US – 2023

- Increase in snacking benefits the cheese market
- Hybrid work spotlights cheese's versatility
 - Graph 18: types of cheese consumed, by work from home status, 2023

Market size and forecast

- Inflation drives cheese dollar sales growth

Market segmentation

- Natural cheese remains foothold of the category
- Smaller segments find success through BFY and convenience

Market share/brand share

- Private label steals growth from big brands across all segments

APPENDIX

- Market definition
- Consumer research methodology
- Generations
- Abbreviations and terms
- Forecast
- Forecast fan chart

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