

TOTAL U.S. YOGURT SNAPSHOT



52 Weeks, 2025YTD and 4 Weeks Ending 1-26-2025



RETAIL YOGURT CONTINUES TO GROW IN POPULARITY

The yogurt market experienced volume growth of 3.5% in 2023, 7.4% in 2024 and is seeing an increase of 9% in the first four weeks of 2025. All regions are witnessing significant growth over the past 52 weeks and into 2025.

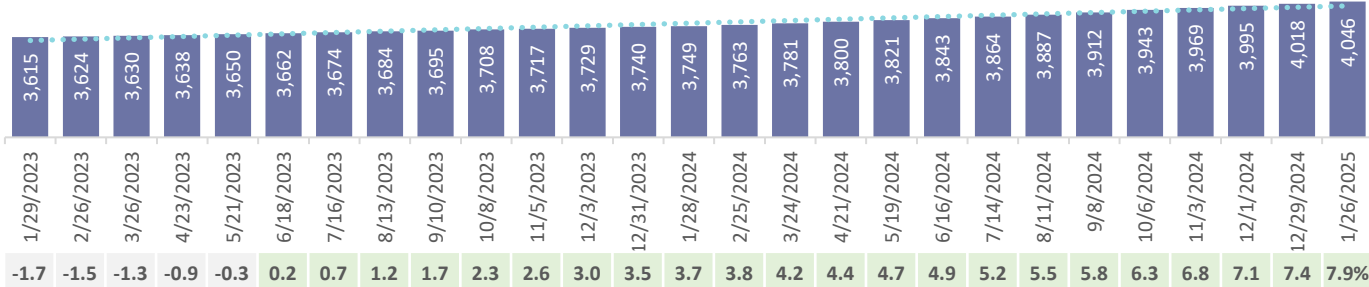
- Penetration increased by 0.9 points over the last year, while the buy rate rose by nearly 7%.
- The traditional yogurt segment, making up 50% of category volume, saw a slight rise of 0.2% in volume over the past year, although it is facing a 1.5% decline in 2025 year-to-date. In contrast, the higher protein Greek yogurt segment, accounting for 46% of volume, increased 22% in early 2025, building on a 17% volume gain in 2024.
- Icelandic yogurt, which is also a high protein option, is witnessing impressive growth of 27% in 2025, though it remains a niche market at 1.3% of total category volume.
- Alternative yogurts represent a small segment at 1.6% of yogurt volume. After peaking in 2022, sales have

- declined by 2.9% over the past year but are showing small growth in early 2025. So Delicious and Silk are the leading brands in this segment, holding over 60% of the market volume share, although growth in 2025 is coming from smaller brands.
- Within the yogurt sector, health & wellness claims are key growth drivers. Organic and low sugar products account for 7% and 10% of category volume, respectively, contributing to 12% and 26% of the overall category volume growth.

Rolling 52 Weeks Volume Trend

RETAIL YOGURT VOLUME (M Pints) and % CHANGE VS YEAR AGO

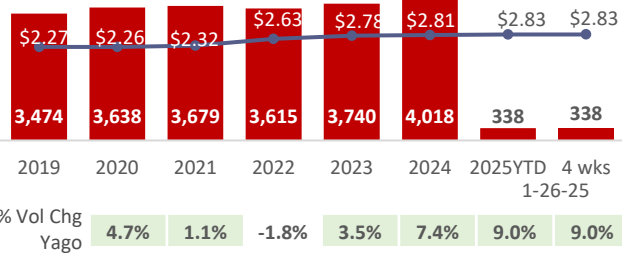
\$11.4B latest 52 wks
+9.5% vs Yago



Calendar Year Volume and Price Trend

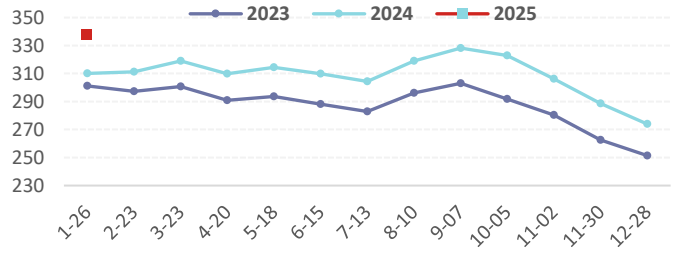
TOTAL RETAIL YOGURT

Vol. Sales (M Pints) Avg. Price/Pint



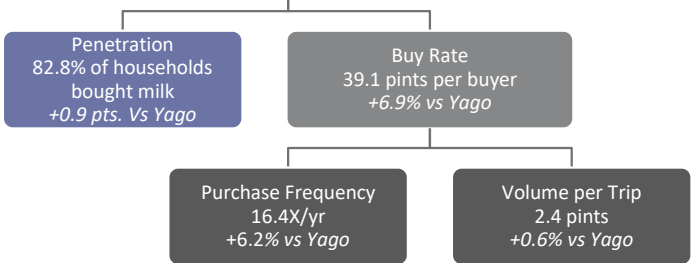
Quad-week Sales View

YOGURT RETAIL VOLUME, Million Pints By 4-Week Periods



Purchase Dynamics

How did buying behavior change over the last 52 wks



Regional Volume Trend

	% Chg vs Yago	Volume Index	Latest 52 Wks	2025YTD	Latest 4 Wks
TOTAL U.S.		100	7.9%	9.0%	9.0%
California		93	6.7%	8.3%	8.3%
Great Lakes		100	8.2%	9.2%	9.2%
Mid-South		99	9.0%	9.9%	9.9%
Northeast		112	6.8%	6.4%	6.4%
Plains		105	8.2%	9.7%	9.7%
South Central		80	8.7%	11.3%	11.3%
Southeast		101	8.7%	9.3%	9.3%
West		108	7.8%	9.7%	9.7%

TOTAL U.S. YOGURT SNAPSHOT

52 Weeks, 2025YTD and 4 Weeks Ending 1-26-2025

Yogurt Segments Volume Trend

-- % Chg vs Yago --

	52 Wk Volume (M pints)	52 Wk Vol Share	52 Wks	2025YTD	Latest 4 Wks
TOTAL Yogurt	4,043.8	100.0%	7.9%	9.0%	9.0%
Traditional	2,011.4	49.7%	0.2%	-1.5%	-1.5%
Greek	1,855.1	45.9%	18.0%	22.3%	22.3%
Australian	59.8	1.5%	0.0%	-3.5%	-3.5%
Icelandic	53.7	1.3%	25.9%	27.2%	27.2%
Alternative	63.9	1.6%	-2.9%	1.1%	1.1%

Yogurt Segments Pricing Trend

-- Avg Price/Gal--

-- % Chg vs Yago --

	52 Wks	2024	Latest 4 Wks	52 Wks	2025YTD	Latest 4 Wks
TOTAL Yogurt	\$2.82	\$2.83	\$2.83	1.4%	3.7%	3.7%
Traditional	\$2.44	\$2.47	\$2.47	2.3%	6.2%	6.2%
Greek	\$3.07	\$3.04	\$3.04	-1.1%	-0.8%	-0.8%
Australian	\$3.91	\$4.16	\$4.16	-0.6%	1.9%	1.9%
Icelandic	\$4.80	\$4.79	\$4.79	1.3%	2.2%	2.2%
Alternative	\$4.95	\$4.85	\$4.85	1.7%	2.6%	2.6%

Volume Trends by Fat Content

Volume % Chg vs Yago

Volume Share 52 Weeks

	52 Wks	2025YTD	4 Wks	Volume Share 52 Weeks
Total Yogurt	7.9%	9.0%	9.0%	100.0%
Whole Fat	11.2%	13.2%	13.2%	22.7%
2%	24.9%	16.1%	16.1%	2.0%
1%	2.7%	5.1%	5.1%	39.4%
Fat Free	11.2%	10.5%	10.5%	36.0%

Penetration (% Households that purchased in latest 52 wks)

Total 82.8%; Whole 49.6% 2% 11.5%; 1% 63.1%; FF 60.9%

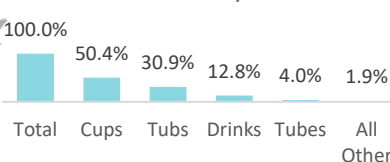
Volume Share and Trend by Outlet

	% Volume Chg vs Yago	Latest 52 Wks	2025YTD	Latest 4 Wks
TOTAL U.S.	7.9%	9.0%	9.0%	
Grocery	5.9%	7.1%	7.1%	
Supercenters, Club, Other	10.6%	11.3%	11.3%	
C-Store	-1.5%	-0.9%	-0.9%	
Drug	1.9%	41.5%	41.5%	

Yogurt Packaging



Volume Share, 52 Wks



% Volume Chg vs Yago

	52 wks	2025YTD	4 wks
Total	7.9%	9.0%	9.0%
Cups	3.9%	2.7%	2.7%
Tubs	16.4%	19.9%	19.9%
Drinks	9.4%	14.5%	14.5%
Tubes	-3.7%	-1.3%	-1.3%
All Other	7.1%	2.2%	2.2%

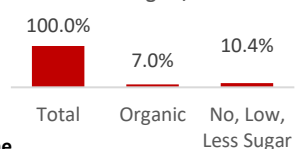
Share and 52 Wk % Growth

Vol. Share Vol. % Chg

Total Cups	100.0%	3.9%
4.01-6oz MP	46.2%	6.9%
4.01-6oz SS	36.8%	2.6%
2.1-4oz MP	14.1%	-3.2%
Total Drinks	100.0%	8.3%
2.1-4ozMP	49.5%	-2.9%
6.01-8oz MP	16.1%	18.2%
6.01-8oz SS	12.7%	22.9%
48.01-64ozMS	4.8%	16.0%

Yogurt Claims

Volume Share of Yogurt, 52 Wks



% Volume Chg vs Yago

	52 wks	2025YTD	4 wks
Total	7.9%	9.0%	9.0%
Organic	14.6%	16.2%	16.2%
No, Low, Less Sugar	22.6%	27.8%	27.8%

New Product Spotlight



USA (Feb '25)
Aldi Friendly Farms
Low fat Greek yogurt drink with 10g protein



USA (Feb '25)
Siggi's
High quality protein. Low fat skyr yogurt with spiced pear and fig flavor. Limited time 20th anniversary.



AUSTRALIA (Feb '25)
Farmer's Union
Greek-style yogurt with no added sugar. Scientifically proven to support gut health. Prebiotic plus billions of probiotics.



JAPAN (Feb '25)
Meiji PA-3
Low sugar yogurt drink with PA-3 lactic acid bacteria that suppresses the absorption of purines contained in food. Helps prevent uric acid levels from rising after meals.