

TOTAL U.S. YOGURT SNAPSHOT



52 Weeks, 2025YTD and 4 Weeks Ending 3-23-2025

YOGURT RETAIL MARKET CONTINUES TO GROW RAPIDLY

The yogurt market is witnessing a volume increase of over 10% for 2025 so far, with all regions experiencing robust growth.

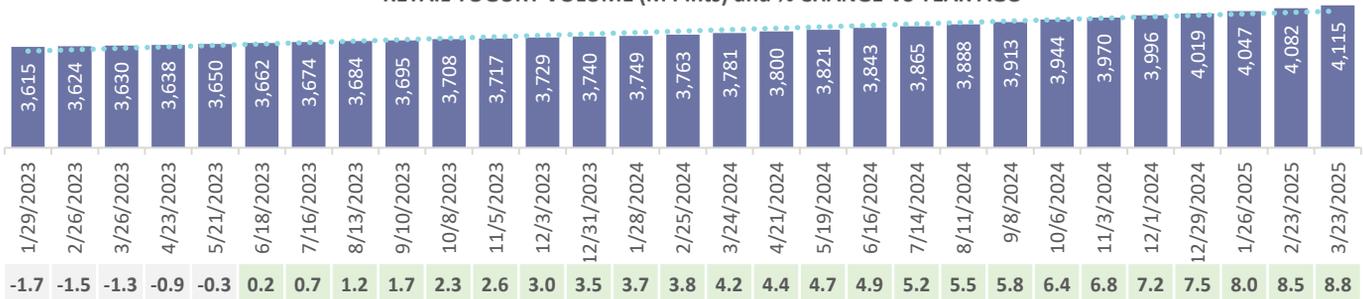
- **Purchase frequency** is the main factor driving this growth, with product trips up nearly 7% compared to last year. Additionally, more consumers are buying yogurt, which has also boosted the amount purchased per shopping trip.
- Traditional yogurt remains the largest segment, accounting for 49% of the market. **Greek yogurt** is leading the growth at 20% year-to-date and 18% over the past four weeks. If this trend continues, Greek yogurt is poised to surpass traditional yogurt as the largest segment next year. Australian (e.g., Noosa) and Icelandic (e.g., Siggí's, Icelandic Provisions) yogurts are also growing rapidly from smaller bases.

- Yogurt sales are increasing at both ends of the fat spectrum. **Fat-free yogurts** are the most popular segment, holding 36% market share and are experiencing 12% growth in the latest period, whereas **whole fat yogurts** hold 23% of the market and are growing at 14%.
- New offerings in the yogurt aisle range from **higher protein** products to indulgent **dessert-like** options. They also include the fast-growing **yogurt drink** segment, spoonables, and yogurt **spouted pouches** aimed at on-the-go adults.

Rolling 52 Weeks Volume Trend

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

\$11.5B latest 52 wks
+10.2% vs Yago



Calendar Year Volume and Price Trend

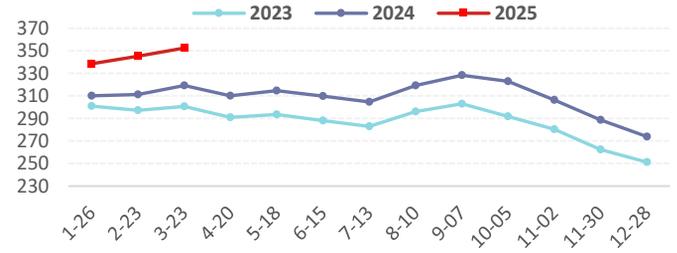
TOTAL RETAIL YOGURT

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



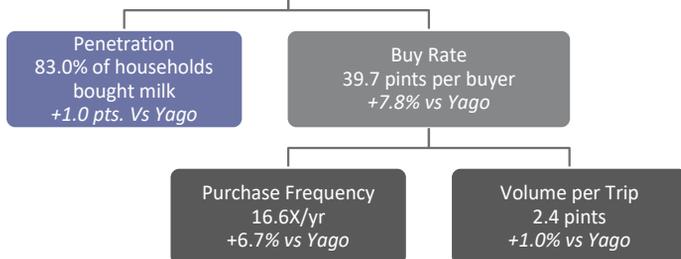
Quad-week Sales View

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	8.8%	10.2%	10.4%
California	93	8.3%	10.9%	12.0%
Great Lakes	100	9.3%	10.7%	11.0%
Mid-South	99	9.7%	10.6%	10.7%
Northeast	111	7.2%	7.5%	8.5%
Plains	105	8.8%	10.2%	9.7%
South Central	80	10.1%	12.7%	13.3%
Southeast	101	9.3%	9.9%	8.7%
West	108	9.0%	11.3%	11.6%

TOTAL U.S. YOGURT SNAPSHOT



52 Weeks, 2025YTD and 4 Weeks Ending 3-23-2025

Yogurt Segments Volume Trend

-- % Chg vs Yago --

	52 Wk Volume (M pints)	52 Wk Vol Share	52 Wks	2025YTD	Latest 4 Wks
TOTAL Yogurt	4,113.2	100.0%	8.8%	10.2%	10.5%
Traditional	2,022.0	49.2%	1.1%	1.4%	3.3%
Greek	1,909.9	46.4%	18.5%	20.3%	17.6%
Australian	60.4	1.5%	1.2%	3.3%	12.0%
Icelandic	55.5	1.3%	27.1%	27.1%	28.1%
Alternative	65.4	1.6%	0.4%	10.5%	19.5%

Yogurt Segments Pricing Trend

-- Avg Price/Gal--

-- % Chg vs Yago --

	52 Wks	2024	Latest 4 Wks	52 Wks	2025YTD	Latest 4 Wks
TOTAL Yogurt	\$2.83	\$2.84	\$2.86	1.8%	3.1%	3.3%
Traditional	\$2.45	\$2.48	\$2.48	2.6%	4.7%	4.0%
Greek	\$3.07	\$3.04	\$3.06	-0.6%	-0.1%	1.1%
Australian	\$3.91	\$3.78	\$4.11	-0.4%	0.8%	0.1%
Icelandic	\$4.82	\$4.78	\$4.76	1.8%	2.1%	2.1%
Alternative	\$4.95	\$4.89	\$4.87	1.8%	1.1%	0.0%

Volume Trends by Fat Content

Volume % Chg vs Yago

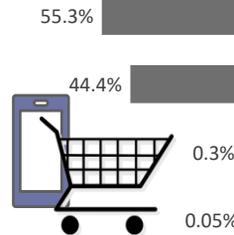
Volume Share 52 Weeks

	52 Wks	2025YTD	4 Wks	Volume Share 52 Weeks
Total Yogurt	8.8%	10.2%	10.5%	100.0%
Whole Fat	12.7%	13.4%	13.9%	22.8%
2%	23.2%	15.7%	13.7%	2.0%
1%	4.0%	6.3%	7.2%	39.1%
Fat Free	11.3%	12.4%	11.8%	36.2%

Penetration (% Households that purchased in latest 52 wks)
Total 83.0%; Whole 50.0% 2% 11.6%; 1% 63.4%; FF 61.1%

Volume Share and Trend by Outlet

100.0% Volume Share



	% Volume Chg vs Yago	Latest 52 Wks	2025YTD	Latest 4 Wks
TOTAL U.S.	8.8%	10.2%	10.4%	
Grocery	6.9%	8.4%	8.1%	
Supercenters, Club, Other	11.4%	12.4%	13.5%	
C-Store	-0.3%	5.4%	12.5%	
Drug	9.3%	34.6%	27.7%	

Yogurt Packaging



Volume Share, 52 Wks



% Volume Chg vs Yago

	52 wks	2025YTD	4 wks
Total	8.8%	10.2%	10.5%
Cups	4.6%	5.1%	5.5%
Tubs	17.4%	19.3%	18.0%
Drinks	11.6%	16.1%	18.5%
Tubes	-4.0%	-4.1%	-4.1%
All Other	6.5%	4.5%	5.6%

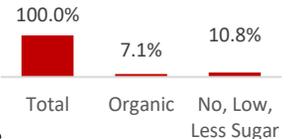
Share and 52 Wk % Growth

Vol. Share Vol. % Chg

Total Cups	100.0%	4.6%
4.01-6oz MP	46.3%	7.0%
4.01-6oz SS	36.6%	3.0%
2.1-4oz MP	13.9%	-2.8%
Total Drinks	100.0%	8.3%
2.1-4ozMP	48.0%	-2.1%
6.01-8oz MP	16.4%	21.1%
6.01-8oz SS	12.9%	24.8%
48.01-64ozMS	4.8%	14.4%

Yogurt Claims

Volume Share of Yogurt, 52 Wks



% Volume Chg vs Yago

	52 wks	2025YTD	4 wks
Total	8.8%	10.2%	10.4%
Organic	14.3%	15.7%	16.3%
No, Low, Less Sugar	24.8%	31.8%	32.7%

New Product Spotlight



USA (Apr '25)
Chobani Flip Lemon Greek low fat yogurt with a separate portion of red, white and blue popping candy.



USA (Apr '25)
Siggis's Protein Pack On-the-go nutrition. The Protein Packs contain 11 grams of protein per pack and are crafted with real fruit and no artificial flavors or added sweeteners.



AUSTRALIA (Apr '25)
Paul's High protein yogurt with chocolate flavor. 15g protein in a spouted pouch.



UK (Mar '25)
Coop UK Thick creamy live yogurt blended with fudge sauce

Source: Innova