

TOTAL U.S. YOGURT SNAPSHOT

52 Weeks, Year-to-date, and 4 Weeks Ending 2-22-2026



YOGURT DEMONSTRATES STABLE, RESILIENT LONG-TERM RETAIL SALES PERFORMANCE

Recent 4-week softness should be interpreted with caution, as it is likely influenced by external factors rather than a fundamental shift in demand. Severe winter storms in late January accelerated early year purchasing and leading to a temporary slowdown in the latest 4 weeks as households worked through pantry inventory.

Over the past 52 weeks, yogurt has maintained **strong household penetration (~84%)**, reinforcing its position as a staple category. Lower-fat options continue to dominate volume (36% fat-free, 38% 1% fat), while whole milk yogurt is a key growth driver, now accounting for 24% of total volume.

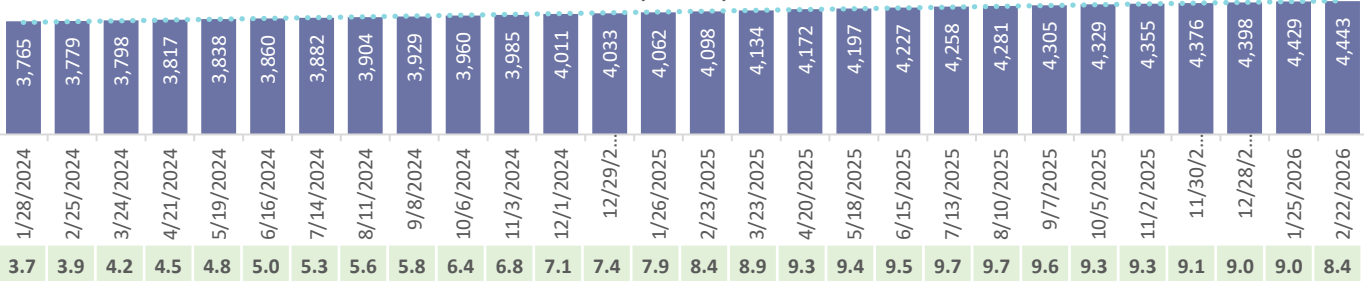
Growth continues to be fueled by premiumization, supported by consumer interest in functional benefits such as protein, probiotics, and digestive health, as well as premium and differentiated offerings (e.g., lactose-free, high protein). These segments are helping offset pressure in more traditional areas. Notably, no/low/less sugar products now represent 13% of volume and are seeing growth of ~30% this year.

Greek yogurt now accounts for more than half of total yogurt volume. While tubs and cups remain the dominant formats, drinkable Greek yogurt, currently at 9% share, has driven 27% of category growth over the past year.

An emerging opportunity lies within the beverage space, particularly in convenience stores. Although only 1.3% of yogurt drink volume is currently sold through this channel, it is experiencing rapid growth (nearly 40%), driven by its alignment with grab-and-go consumption. With protein demand remaining strong, continued momentum is expected.

Rolling 52 Weeks Volume Trend

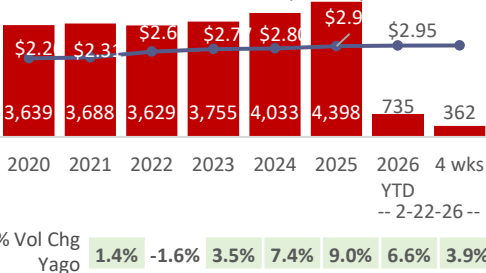
RETAIL YOGURT VOLUME (M Pints) and % CHANGE VS YEAR AGO



Calendar Year Volume and Price Trend

TOTAL RETAIL YOGURT

Vol. Sales (M Pints)



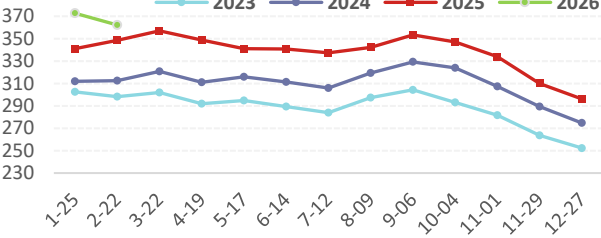
By week

Volume % Chg vs Yago	
wk end 1-4	0.7%
wk end 1-11	7.6%
wk end 1-18	6.1%
wk end 1-25	22.7%
wk end 2-1	-2.1%
wk end 2-8	2.5%
wk end 2-15	6.5%
wk end 2-22	9.0%

Quad-week Sales View

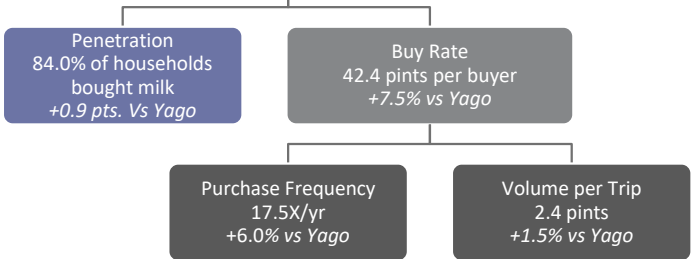
YOGURT RETAIL VOLUME, Million Pints

By 4-Week Periods



Purchase Dynamics, Latest 52 Weeks

How did buying behavior change over the last 52 wks



Regional Volume Trend

	Volume Index	Latest 52 wks	2026YTD (2/22)	Latest 4 wks
TOTAL U.S.	100	8.4%	6.6%	3.9%
California	91	7.2%	6.1%	7.0%
Great Lakes	101	9.4%	6.0%	3.1%
Mid-South	100	9.0%	6.6%	0.5%
Northeast	110	7.1%	5.8%	2.2%
Plains	106	9.5%	7.5%	5.6%
South Central	82	9.8%	7.9%	3.6%
Southeast	102	8.2%	6.5%	4.3%
West	107	8.4%	7.4%	7.4%

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Yogurt Segments Volume Trend

-- % Chg vs Yago --

	52 Wks Volume (M pints)	52 Wks Vol Share	Latest 52 Wks	2026YTD (2/22)	Latest 4 Wks
TOTAL Yogurt	4,441.7	100.0%	8.4%	6.6%	3.9%
Traditional	1,856.0	41.8%	-2.4%	-2.2%	-3.6%
Greek	2,393.1	53.9%	18.3%	13.3%	9.3%
Australian	65.4	1.5%	9.3%	9.0%	5.3%
Icelandic	69.3	1.6%	28.0%	29.8%	34.0%
Alternative	57.8	1.3%	0.0%	2.0%	0.1%

Yogurt Segments Pricing Trend

-- Avg Price/Gal--

-- % Chg vs Yago --

	Latest 52 Wks	2026YTD (2/22)	Latest 4 Wks	Latest 52 Wks	2026YTD (2/22)	Latest 4 Wks
TOTAL Yogurt	\$2.94	\$2.95	\$2.95	4.7%	4.8%	5.0%
Traditional	\$2.43	\$2.44	\$2.44	3.0%	2.6%	1.8%
Greek	\$3.20	\$3.18	\$3.20	3.8%	4.6%	5.6%
Australian	\$3.85	\$3.53	\$3.24	-1.6%	-2.8%	-2.5%
Icelandic	\$4.91	\$4.91	\$4.80	1.9%	2.4%	0.0%
Alternative	\$5.37	\$5.46	\$5.56	5.5%	6.8%	6.7%

Volume Trends by Fat Content

Volume % Chg vs Yago

Volume Share

	Latest 52 Wks	2026YTD (2/22)	Latest 4 Wks	Volume Share 52 Weeks
Total Yogurt	8.4%	6.6%	3.9%	100.0%
Whole Fat	13.8%	12.9%	10.5%	23.7%
2%	5.6%	0.0%	-1.9%	2.1%
1%	6.1%	8.6%	7.2%	38.2%
Fat Free	7.7%	1.0%	-3.0%	36.0%

Penetration (% Households that purchased in latest 52 wks)

Total 84.0%; Whole 51.4% 2% 12.1%; 1% 63.9%; FF 62.4%

Volume Share and Trend by Outlet

	% Volume Chg vs Yago	Latest 52 Wks	2026YTD (2/22)	Latest 4 Wks
TOTAL U.S.	8.4%	6.6%	3.9%	
Grocery	6.3%	4.4%	2.3%	
Supercenters, Club, Other	11.0%	9.0%	5.8%	
C-Store	27.6%	39.3%	34.2%	

Yogurt Packaging

Volume Share, 52 Wks

	Total	Cups	Tubs	Drinks	Tubes	All Other
% Volume Chg vs Yago						
Latest 52 wks	8.4%	3.6%	15.1%	15.4%	-8.7%	16.9%
2026YTD	6.6%	1.5%	12.9%	12.5%	-9.7%	26.9%
Latest 4 wks	3.9%	-1.6%	10.9%	10.2%	-12.7%	23.3%

Category Share and % Growth

MP=multi-pack
SS=single-serve
MS=multi-serve
52 wks ending
2-22-26

	Vol. Share	Vol % Chg
Total Cups	100.0%	3.6%
4.01-6oz MP	46.1%	2.3%
4.01-6oz SS	34.8%	-1.2%
2.1-4oz MP	12.9%	-3.7%
6.01-8oz SS	2.8%	52.0%
Total Drinks	100.0%	15.4%
2.1-4oz MP	41.8%	-0.9%
6.01-8oz SS	14.3%	28.0%
6.01-8oz MP	12.1%	-14.1%
8.01-12oz MP	11.2%	248.5%
8.01-12oz SS	7.1%	62.1%
48.01-64oz MS	4.5%	6.6%
4.01-6oz MP	3.1%	0.5%

Yogurt Claims

Volume Share of Yogurt
52 Wks

Lactose-free
Share of DAIRY
yogurt: 6.7%

	Total	No, Low, Lactose- Less Sugar	Organic	Free
% Volume Chg vs Yago				
52 wks	8.4%	33.8%	71.0%	6.8%
2026YTD	6.6%	31.9%	66.2%	-2.1%
4 wks	3.9%	28.0%	53.2%	-5.0%

note: yogurt includes dairy + alternatives

New Product Spotlight



USA (Mar '26)

Lifeway Lactose free kefir. Zero added sugar. Contains 5g creatine per serving for brain support and muscle performance. Contains 20g protein per serving. Contains 50 billion CFU of probiotics from 12 live and active cultures to support muscle performance, recovery and a healthy microbiome.

Source: Innova



USA (Mar '26) Kroger

Protein yogurt made with ultrafiltered milk. 20g protein. Vitamin A and D added. 0g added sugar. No artificial sweeteners or flavors. Low sodium. Proven quality at low prices.



GREECE (Mar '26)

Youphoria High protein smoothie with Greek yogurt + collagen..



CANADA (Mar '26)

logo Nano Mixed berries yogurt with strawberry flavored popping bubbles.