

TOTAL U.S. YOGURT SNAPSHOT



52 Weeks, 2025YTD and 4 Weeks Ending 7-13-2025



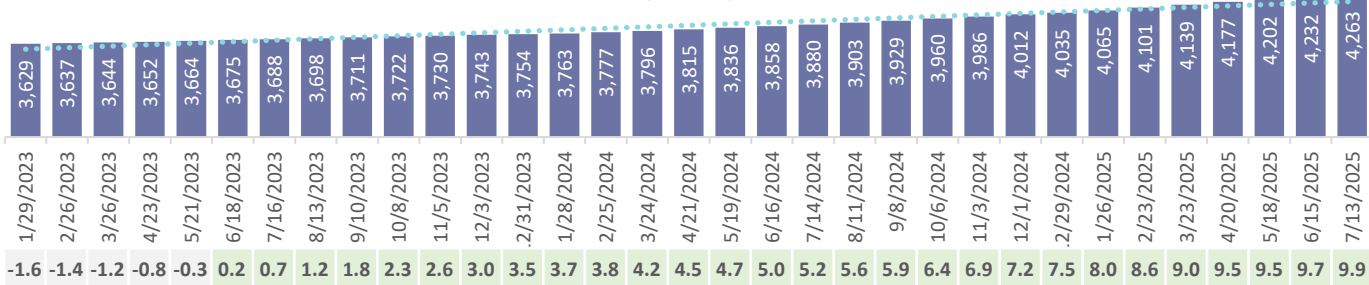
YOGURT RETAIL SALES REMAIN STRONG WITH DOUBLE-DIGIT VOLUME GROWTH

Total retail yogurt volume is up 10% year-to-date and in the latest four weeks compared to year ago. Household engagement is high with penetration at 83%, up 1 point from the previous year. The buy rate has increased by 9% over the past year and stands at 41 pints per buyer. Shoppers are making 17 trips on average for yogurt throughout the year, up 8% from year ago.

- Greek yogurt is fueling volume growth with an uptick of 16% in the latest four-week period. Greek represents 48% of total yogurt volume, just above traditional yogurt's 47% share. Traditional yogurt experienced a 2.7% volume lift but is losing share to premium and specialty yogurts.
- Higher fat yogurts are experiencing the strongest rates of growth at 18% and 14% respectively. However, lower fat segments comprise the largest portion of volume at a combined 75% of volume. 1% and fat free yogurts continue to grow at a slower pace compared to higher fats.
- Yogurt cups (50% volume) and tubs (32% volume) dominate, but drinks in addition to tubs are fast growing segments. Other packaging includes child yogurt pouches which are seeing strong growth from a smaller base.
- Strong momentum continues in no/low sugar yogurts, organic and lactose-free segments. Lactose-free now accounts for 4.5% share of dairy yogurt.
- The *New Product Innovation Spotlight* (Aug '25 launches) includes enhanced wellness-focused offerings: high protein + fiber for muscle and digestive health, lactose-free/lower sugar yogurts in kid-friendly pouches and a refresh of Activia to include both probiotics and prebiotic fiber.

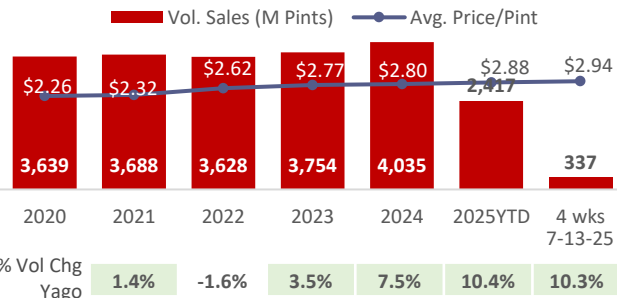
Rolling 52 Weeks Volume Trend

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



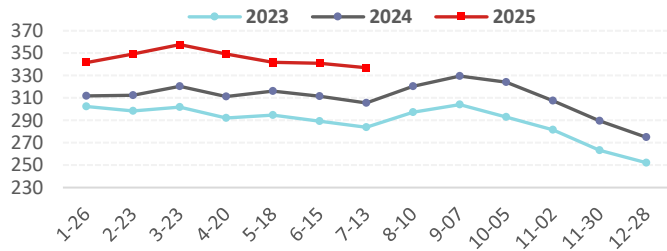
Calendar Year Volume and Price Trend

TOTAL RETAIL YOGURT

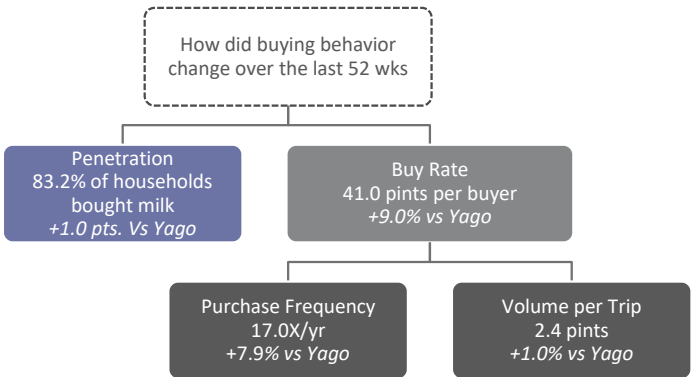


Quad-week Sales View

YOGURT RETAIL VOLUME, Million Pints
By 4-Week Periods



Purchase Dynamics



Regional Volume Trend

	% Chg vs Yago	Volume Index	Latest 52 Wks	2025YTD	Latest 4 Wks
TOTAL U.S.		100	9.9%	10.4%	10.3%
California		93	9.3%	10.0%	8.9%
Great Lakes		101	11.0%	11.9%	11.7%
Mid-South		99	10.7%	11.2%	11.1%
Northeast		111	8.1%	8.3%	9.0%
Plains		106	10.4%	11.3%	11.1%
South Central		80	11.5%	12.4%	11.1%
Southeast		101	9.8%	10.1%	10.6%
West		107	9.8%	10.1%	9.6%

TOTAL U.S. YOGURT SNAPSHOT



52 Weeks, 2025YTD and 4 Weeks Ending 7-13-2025

Yogurt Segments Volume Trend

-- % Chg vs Yago --

	52 Wk Volume (M pints)	52 Wk Vol Share	52 Wks	2025YTD	Latest 4 Wks
TOTAL Yogurt	4,261.8	100.0%	9.9%	10.5%	10.3%
Traditional	2,041.4	47.9%	2.2%	2.4%	2.7%
Greek	2,021.0	47.4%	18.2%	18.1%	16.2%
Australian	62.7	1.5%	5.3%	7.7%	11.8%
Icelandic	59.3	1.4%	26.2%	25.0%	28.5%
Alternative	77.5	1.8%	20.6%	38.3%	57.6%

Yogurt Segments Pricing Trend

-- Avg Price/Gal--

-- % Chg vs Yago --

	52 Wks	2024	Latest 4 Wks	52 Wks	2025YTD	Latest 4 Wks
TOTAL Yogurt	\$2.86	\$2.88	\$2.94	2.8%	3.6%	4.4%
Traditional	\$2.48	\$2.51	\$2.52	3.6%	4.5%	3.6%
Greek	\$3.07	\$3.08	\$3.18	0.7%	1.5%	3.9%
Australian	\$3.89	\$3.77	\$3.26	-0.9%	-0.4%	-1.2%
Icelandic	\$4.88	\$4.86	\$4.79	2.7%	3.0%	0.2%
Alternative	\$4.72	\$4.57	\$4.47	-3.2%	-6.6%	-10.4%

Volume Trends by Fat Content

Volume % Chg vs Yago

Volume Share 52 Weeks

	52 Wks	2025YTD4 Wks		
Total Yogurt	9.9%	10.3%	10.5%	100.0%
Whole Fat	16.1%	16.9%	17.8%	23.4%
2%	19.5%	13.6%	14.3%	2.0%
1%	4.9%	7.0%	5.0%	38.2%
Fat Free	11.2%	9.3%	11.7%	36.5%

Penetration (% Households that purchased in latest 52 wks)

Total 83.2%; Whole 50.5% 2% 11.9%; 1% 63.3%; FF 61.7%

Volume Share and Trend by Outlet

100.0% Volume Share

54.7%

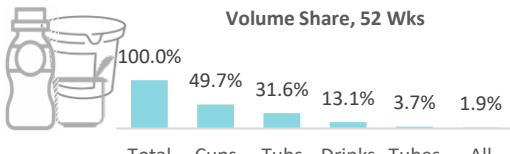
45.0%

0.3%

% Volume Chg vs Yago	Latest 52 Wks	2025YTD	Latest 4 Wks
TOTAL U.S.	9.9%	10.4%	10.3%
Grocery	7.8%	8.4%	7.9%
Supercenters, Club, Other	12.5%	13.0%	13.2%
C-Store	7.4%	14.1%	23.9%

Yogurt Packaging

Volume Share, 52 Wks



% Volume Chg vs Yago

	52 wks	2025YTD	4 wks
Total	9.9%	10.5%	10.3%
Cups	5.5%	5.8%	5.3%
Tubs	18.0%	18.0%	16.6%
Drinks	13.8%	16.4%	16.9%
Tubes	-2.7%	-3.9%	-0.2%
All Other	6.4%	7.4%	13.8%

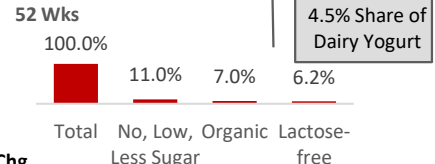
Share and 52 Wk % Growth

Vol. Share Vol. % Chg

Total Cups	100.0%	5.5%
4.01-6oz MP	46.7%	6.1%
4.01-6oz SS	35.9%	3.5%
2.1-4oz MP	13.5%	-0.2%
Total Drinks	100.0%	13.8%
2.1-4oz MP	45.6%	-2.2%
6.01-8oz MP	15.5%	12.5%
6.01-8oz SS	13.5%	27.2%
48.01-64ozMS	4.6%	11.0%

Yogurt Claims (note: yogurt includes dairy +alts)

Volume Share of Yogurt 52 Wks



Vol. % Chg vs Yago

	52 wks	2025YTD	4 wks
Total	9.9%	10.5%	10.3%
No, Low, Organic, Less Sugar	24.3%	25.6%	25.3%
Lactose-free	12.6%	12.7%	7.7%
4.5% Share of Dairy Yogurt	41.4%	63.0%	97.2%

New Product Spotlight



USA (Aug '25)

Danone Oikos Cultured dairy drink With whey, leucine and vitamin D designed to help build and retain muscle mass during weight loss. 23g complete protein plus 5g prebiotic fiber to support digestive health.

Source: Innova



USA (Aug '25) Danone Too Good & Co.

Pouches of lactose-free yogurt made with real fruit and 30% less sugar than the leading kid's yogurt. 5g yogurt per pouch.



USA (Aug '25) Danone Activia New product line

by Activia as part of a broader brand refresh. Low fat yogurt with billions of live probiotics and 3g prebiotic fiber per serving to support digestive health.