

TOTAL U.S. YOGURT SNAPSHOT



52 Weeks, 2025YTD and 4 Weeks Ending 11-30-2025



RETAIL YOGURT VOLUME CONTINUES TO RISE

The U.S. retail yogurt category remains healthy, posting strong sales performance in 2025 YTD and over the latest four weeks. Volume is up **9% YTD** and **7% in the latest period** versus the same time last year, with **broad-based growth across all regions**.

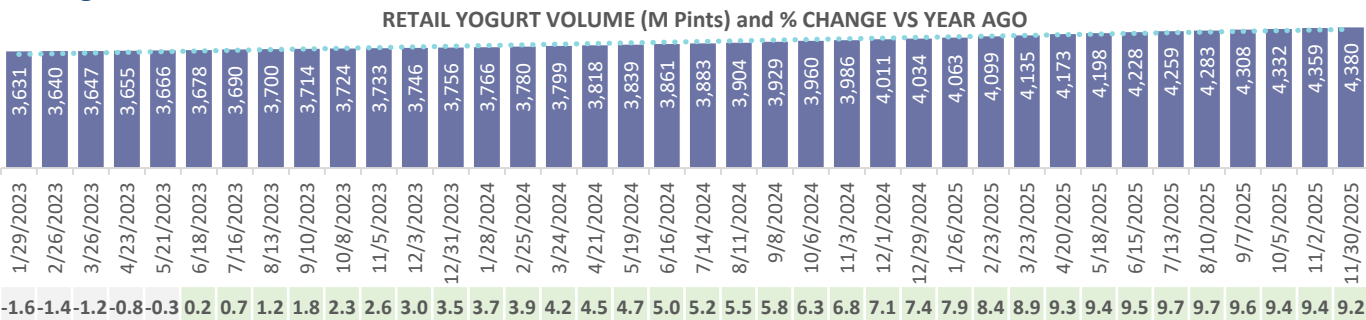
Yogurt remains a highly penetrated and widely consumed dairy segment, with **83.6% of households** purchasing yogurt in the latest 52 weeks. The category continues to demonstrate resilience, supported by **functional innovation, premiumization, and strong consumer engagement**.

High-protein offerings continue to lead growth, reflected in Greek yogurt's **48% share** of the market and the **double-digit sales gains** seen in both Greek and Icelandic styles. Yogurt's strong penetration across fat levels highlights the category's versatility—meeting consumer needs ranging from indulgence and weight management to high-protein snacking.

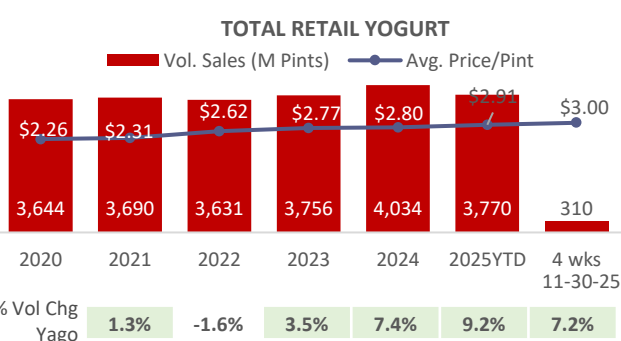
Yogurt drinks are outpacing overall category growth, up **16% in 2025 YTD** and **12% in the latest period** versus last year. Low/less-sugar options are a key growth driver, with volume increasing **118%**, fueled by leading brands. Most of these offerings also carry **protein claims**, reinforcing their health-forward positioning.

Across the broader yogurt category, consumer interest in **protein, probiotics, low sugar, and organic** benefits continues to drive momentum.

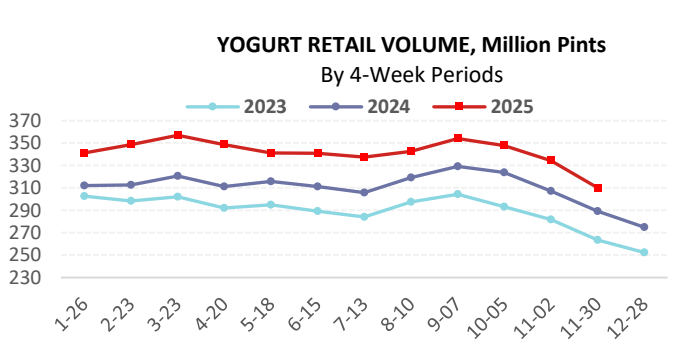
Rolling 52 Weeks Volume Trend



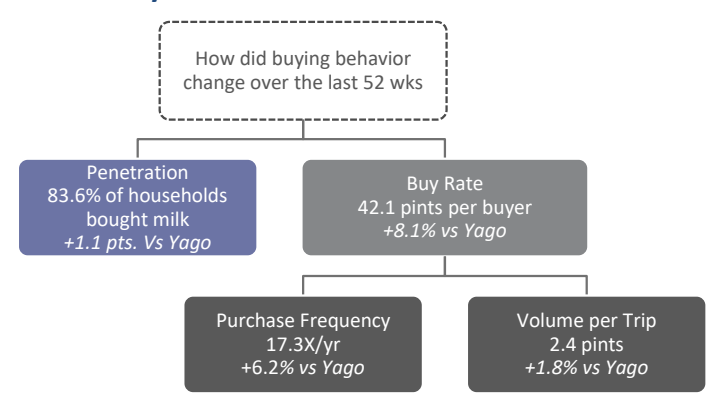
Calendar Year Volume and Price Trend



Quad-week Sales View



Purchase Dynamics



Regional Volume Trend

	% Chg vs Yago	Volume Index	Latest 52 Wks	2025YTD	Latest 4 Wks
TOTAL U.S.		100	9.2%	9.2%	7.2%
California		91	8.1%	8.2%	7.0%
Great Lakes		101	10.4%	10.5%	7.4%
Mid-South		100	9.8%	9.9%	6.4%
Northeast		110	7.5%	7.5%	5.3%
Plains		106	10.3%	10.3%	8.7%
South Central		81	10.7%	10.8%	8.0%
Southeast		102	8.9%	8.9%	7.2%
West		107	9.3%	9.2%	9.7%

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52 Weeks, 2025YTD and 4 Weeks Ending 11-30-2025

Yogurt Segments Volume Trend

-- % Chg vs Yago --

	52 Wk Volume (M pints)	52 Wk Vol Share	52 Wks	2025YTD	Latest 4 Wks
TOTAL Yogurt	4,378.6	100.0%	9.2%	9.3%	7.2%
Traditional	1,870.5	42.7%	-2.0%	-2.0%	-3.2%
Greek	2,288.9	52.3%	18.9%	18.9%	15.3%
Australian	63.8	1.5%	6.0%	6.9%	1.0%
Icelandic	65.0	1.5%	26.0%	25.3%	29.5%
Alternative	90.4	2.1%	41.8%	43.9%	52.3%

Yogurt Segments Pricing Trend

-- Avg Price/Gal--

-- % Chg vs Yago --

	52 Wks	2025YTD	Latest 4 Wks	52 Wks	2025YTD	Latest 4 Wks
TOTAL Yogurt	\$2.91	\$2.91	\$3.00	4.4%	4.4%	4.5%
Traditional	\$2.41	\$2.41	\$2.49	3.3%	3.2%	3.3%
Greek	\$3.17	\$3.17	\$3.25	2.9%	3.0%	3.2%
Australian	\$3.89	\$3.85	\$4.29	-0.3%	-0.4%	1.4%
Icelandic	\$4.91	\$4.91	\$5.07	2.7%	3.0%	0.6%
Alternative	\$4.59	\$4.56	\$4.63	-6.9%	-7.2%	-8.6%

Volume Trends by Fat Content

Volume % Chg vs Yago

Volume Share 52 Weeks

	52 Wks	2025YTD	4 Wks	Volume Share 52 Weeks
Total Yogurt	9.2%	9.3%	7.2%	100.0%
Whole Fat	13.8%	13.9%	11.4%	23.3%
2%	10.0%	10.3%	-0.8%	2.1%
1%	5.8%	5.9%	6.4%	38.3%
Fat Free	10.0%	10.0%	5.9%	36.3%

Penetration (% Households that purchased in latest 52 wks)

Total 83.6%; Whole 50.8% 2% 12.3%; 1% 63.5%; FF 61.9%

Volume Share and Trend by Outlet

100.0% Volume Share

54.3%

45.4%

0.3%

% Volume Chg vs Yago	Latest 52 Wks	2025YTD	Latest 4 Wks
TOTAL U.S.	9.2%	9.2%	7.2%
Grocery	7.1%	7.2%	5.4%
Supercenters, Club, Other	11.7%	11.7%	9.3%
C-Store	20.2%	20.8%	28.1%

Yogurt Packaging

Volume Share, 52 Wks

	Total	Cups	Tubs	Drinks	Tubes	All Other
% Volume Chg vs Yago						
52 wks	9.2%	4.3%	16.5%	15.5%	-7.2%	16.2%
2025YTD	9.3%	4.3%	16.5%	16.3%	-7.5%	16.0%
4 wks	7.2%	2.2%	13.4%	11.5%	-6.8%	31.2%

Category Share and % Growth

MP=multi-pack
SS=single-serve
MS=multi-serve
52 wks ending 11-30-25



	Vol. Share	Vol % Chg
Total Cups	100.0%	4.3%
4.01-6oz MP	46.6%	4.5%
4.01-6oz SS	35.2%	0.7%
2.1-4oz MP	13.0%	-4.2%
6.01-8oz SS	2.7%	58.1%
Total Drinks	100.0%	15.5%
2.1-4oz MP	43.1%	-1.1%
6.01-8oz SS	14.0%	29.0%
6.01-8oz MP	13.3%	-3.3%
8.01-12oz MP	9.1%	269.3%
8.01-12oz SS	6.9%	75.8%
48.01-64oz MS	4.5%	6.7%
4.01-6oz MP	3.2%	-1.1%

Yogurt Claims

Volume Share of Yogurt 52 Wks

100.0%	12.5%	7.5%	7.0%
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Total No, Low, Lactose- Organic Less Sugar free

Vol. % Chg vs Yago

	52 wks	2025YTD	4 wks
% Volume Chg vs Yago			
52 wks	9.2%	33.4%	84.4%
2025YTD	9.3%	33.8%	87.7%
4 wks	7.2%	30.7%	69.9%

note: yogurt includes dairy +alts

New Product Spotlight



U.S. (Nov '25) OUI Whole milk creamy yogurt with seasonal flavor of chocolate and peppermint. Small batch.

Source: Innova



U.S. (Nov '25) General Mills Ratio Pro Fiber Yogurt with 20g protein & 10g fiber. Made with ultra-filtered nonfat milk and live and active cultures. GLP-1 friendly. Available in vanilla, blueberry, pina coloda and lemon.



U.S. (Nov '25) Trader Joe's Whole milk Greek yogurt with cranberry and clementine flavor.



GERMANY (Dec '25) Actimel+ Yogurt drink to support immune system and magnesium to help reduce fatigue. Enriched with vitamin C for antioxidant.