TOTAL U.S. YOGURT SNAPSHOT

2025 Year-end and 4 Weeks Ending 12-28-2025



YOGURT CONTINUES TO DELIVER SUSTAINED, BROAD-BASED GROWTH

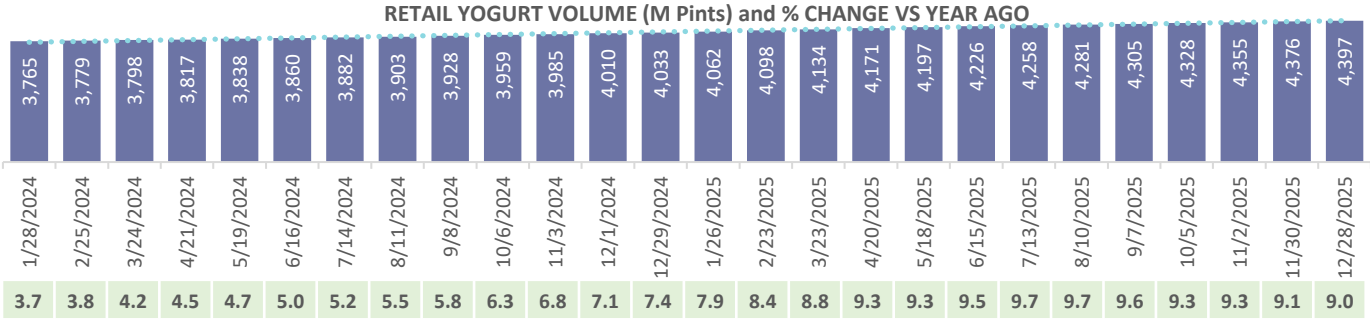
Strong and consistent momentum: Yogurt volume increased 9% for full year 2025, with growth holding at 7.8% in the latest four weeks. Household penetration reached 83.7% and continues to expand, reinforcing yogurt's position as a core driver within dairy.

Growth across fat segments reflects diverse consumer needs: Lower-fat varieties account for 74% of retail volume (1% fat holds 38% share; fat-free holds 36% share) and continue to post solid gains. Whole milk yogurt represents nearly one-quarter of total volume and grew 14% in both full year 2025 and the latest period, signaling sustained demand for both health-forward and more indulgent offerings.

Functional and value-added claims driving premiumization: Claims are increasingly essential for growth and differentiation. No/low/less sugar products represent 14% of volume and are growing at over 30% annually. Lactose-free and organic yogurts each hold 7% share and continue to gain traction, underscoring the importance of health-focused innovation.

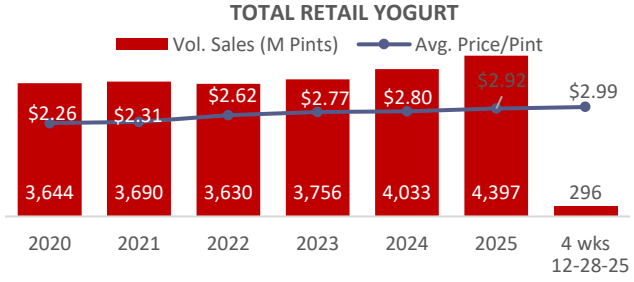
High protein remains a primary growth engine: Greek yogurt represents over half of category sales and continues to post double-digit gains. Tubs and cups dominate in size, each contributing over 40% of volume, while Greek yogurt drinks are rapidly gaining traction as an emerging growth format.

Rolling 52 Weeks Volume Trend



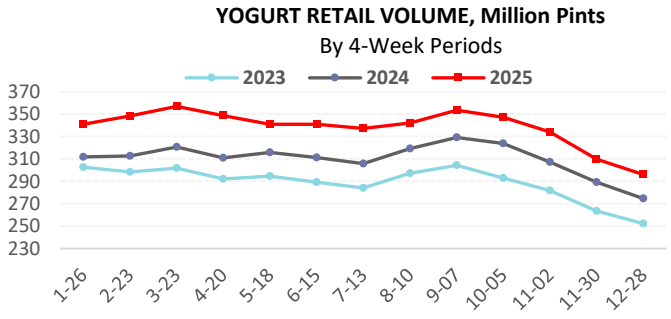
1/28/2024	2/25/2024	3/24/2024	4/21/2024	5/19/2024	6/16/2024	7/14/2024	8/11/2024	9/8/2024	10/6/2024	11/3/2024	12/1/2024	12/29/2024	1/26/2025	2/23/2025	3/23/2025	4/20/2025	5/18/2025	6/15/2025	7/13/2025	8/10/2025	9/7/2025	10/5/2025	11/2/2025	11/30/2025	12/28/2025
3,765	3,779	3,798	3,817	3,838	3,860	3,882	3,903	3,928	3,959	3,985	4,010	4,033	4,062	4,098	4,134	4,171	4,197	4,226	4,258	4,281	4,305	4,328	4,355	4,376	4,397
3.7	3.8	4.2	4.5	4.7	5.0	5.2	5.5	5.8	6.3	6.8	7.1	7.4	7.9	8.4	8.8	9.3	9.3	9.5	9.7	9.7	9.6	9.3	9.3	9.1	9.0

Calendar Year Volume and Price Trend

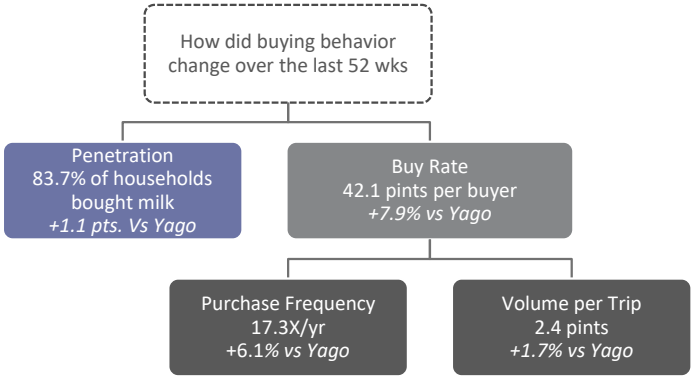


% Vol Chg Yago	1.3%	-1.6%	3.5%	7.4%	9.0%	7.8%

Quad-week Sales View



Purchase Dynamics, Latest 52 Weeks



Regional Volume Trend

% Chg vs Yago	Volume Index	2025	Q4 2025	Latest 4 Wks
TOTAL U.S.	**100**	9.0%	7.8%	7.8%
California	91	7.9%	6.0%	6.3%
Great Lakes	101	10.3%	8.9%	8.5%
Mid-South	100	9.7%	7.8%	7.9%
Northeast	110	7.5%	6.6%	6.9%
Plains	105	10.1%	8.8%	7.9%
South Central	82	10.6%	8.7%	8.4%
Southeast	102	8.9%	7.7%	9.1%
West	107	8.9%	8.4%	7.6%

TOTAL U.S. YOGURT SNAPSHOT

2025 Year-end and 4 Weeks Ending 12-28-2025

Yogurt Segments Volume Trend

-- % Chg vs Yago --

	2025 Volume (M pints)	2025 Vol Share	2025	Q4 2025	Latest 4 Wks
TOTAL Yogurt	**4,395.8**	**100.0%**	**9.1%**	**7.8%**	**7.8%**
Traditional	1,870.5	42.7%	-2.0%	-2.0%	-3.2%
Greek	2,344.9	53.3%	19.9%	17.5%	16.7%
Australian	64.4	1.5%	7.5%	9.1%	18.5%
Icelandic	66.6	1.5%	27.5%	33.2%	45.1%
Alternative	57.6	1.3%	-0.4%	0.9%	1.7%

Yogurt Segments Pricing Trend

-- Avg Price/Gal-- -- % Chg vs Yago --

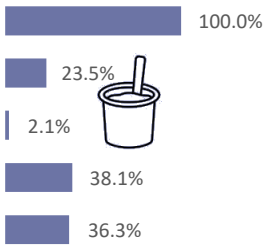
	2025	Q4 2025	Latest 4 Wks	2025	Q4 2025	Latest 4 Wks
TOTAL Yogurt	**$2.92**	**$2.99**	**$2.99**	**4.4%**	**4.6%**	**4.0%**
Traditional	$2.42	$2.48	$2.50	3.1%	3.2%	2.8%
Greek	$3.18	$3.24	$3.23	3.1%	3.6%	3.1%
Australian	$3.87	$4.13	$4.04	-0.8%	-2.3%	-6.9%
Icelandic	$4.91	$4.91	$5.07	2.7%	3.0%	0.6%
Alternative	$5.28	$5.37	$5.45	4.7%	4.1%	4.1%

Volume Trends by Fat Content

Volume % Chg vs Yago

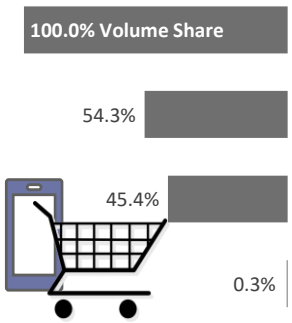
	2025	Q4 2024	4 Wks
Total Yogurt	9.1%	7.8%	9.1%
Whole Fat	13.9%	13.2%	13.9%
2%	8.6%	-1.0%	8.6%
1%	5.6%	5.7%	5.6%
Fat Free	9.8%	7.1%	9.8%

Volume Share 52 Weeks



Penetration (% Households that purchased in latest 52 wks)
Total 83.7%; Whole 50.6% 2% 12.0%; 1% 63.5%; FF 62.1%

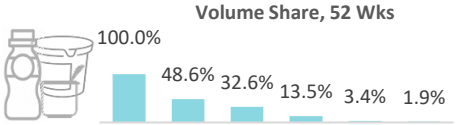
Volume Share and Trend by Outlet



% Volume Chg vs Yago	2025	Q4 2025	Latest 4 Wks
TOTAL U.S.	9.0%	7.8%	7.8%
Grocery	7.0%	5.8%	6.0%
Supercenters, Club, Other	11.5%	10.0%	9.9%
C-Store	22.4%	30.1%	33.5%

Yogurt Packaging

Volume Share, 52 Wks



% Volume Chg vs Yago	Total	Cups	Tubs	Drinks	Tubes	All Other
52 wks	9.1%	4.2%	16.2%	15.8%	-7.9%	13.3%
2025YTD	7.8%	3.3%	14.1%	12.4%	-9.0%	21.8%
4 wks	7.8%	3.2%	12.8%	15.2%	-10.6%	25.8%

Category Share and % Growth

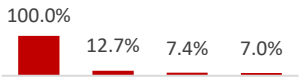
MP=multi-pack
SS= single-serve
MS=multi-serve
52 wks ending 11-30-25



	Vol. Share	Vol % Chg
Total Cups	**100.0%**	**4.2%**
4.01-6oz MP	46.7%	4.5%
4.01-6oz SS	35.0%	0.0%
2.1-4oz MP	12.9%	-4.3%
6.01-8oz SS	2.8%	57.7%
Total Drinks	**100.0%**	**15.8%**
2.1-4oz MP	42.8%	-0.8%
6.01-8oz SS	14.1%	29.0%
6.01-8oz MP	12.9%	-7.1%
8.01-12oz MP	9.8%	273.6%
8.01-12oz SS	6.9%	71.9%
48.01-64ozMS	4.5%	6.9%
4.01-6oz MP	3.1%	-1.0%

Yogurt Claims

Volume Share of Yogurt 52 Wks



Vol. % Chg vs Yago	Total	No, Low, Less Sugar	Lactose-free	Organic
2025	**9.1%**	33.8%	63.9%	9.7%
Q4 2025	**7.8%**	32.6%	61.6%	4.8%
4 wks	**7.8%**	32.4%	63.8%	3.2%

note: yogurt includes dairy +alts

New Product Spotlight



Source: Innova

UK (Jan '26)
M&S Food Brain Food Mango and passion fruit flavored kefir yogurt. Contains live cultures, folic acid and vitamin B12, along with iron to support brain health.



JAPAN (Jan '26)
Kirin Immune care yogurt drink. Contains milk and soy.



SWITZERLAND (Dec'25)
Nestle With calcium for your digestive enzymes. For your immune system.



UKRAINE (Dec '25)
Danone Bifidoyogurt with 5 cereals. Three benefits: digestive comfort, daily nutrients, energy balance



AUSTRIA (Dec'25)
Bifidus Lactose-free fermented milk. Contains vitamins C, biotin, zinc and inulin. High protein. Designed to support beauty form within, particularly for skin and hair.