

# TOTAL U.S. YOGURT SNAPSHOT



4 Weeks, 2024YTD and Latest 52 Weeks Ending 11-03-2024

## RETAIL YOGURT SHOWCASES SIGNIFICANT GROWTH

Retail yogurt volume has increased by nearly 7% year-to-date as of November 3, 2024, compared to the same period last year, with a surge of almost 9% in the past four weeks. Rising purchase rates are contributing to a robust sales performance across all regions of the country.

Greek yogurt continues to show substantial double-digit volume growth, capturing 45% of the market share. While traditional yogurt has experienced a decline year-to-date, it has seen a resurgence in the most recent four-week period. All fat levels are thriving, with low-fat and fat-free options accounting for over 75% of the sales volume. More than 60% of households are opting for these lower fat choices.

Cups and tubs remain favored packaging options, with tubs experiencing double-digit growth. Yogurt drinks have also seen strong growth of 16% in the latest four weeks compared to last year. Conversely, tubes, which represent a small segment at 4% volume, are the only packaging option experiencing a decline, losing penetration over recent years.

The yogurt category is well-equipped for future expansion, aligning with consumers' increasing focus on health and wellness. Its versatility in flavors and formats makes it a convenient grab-and-go snack for busy lifestyles.

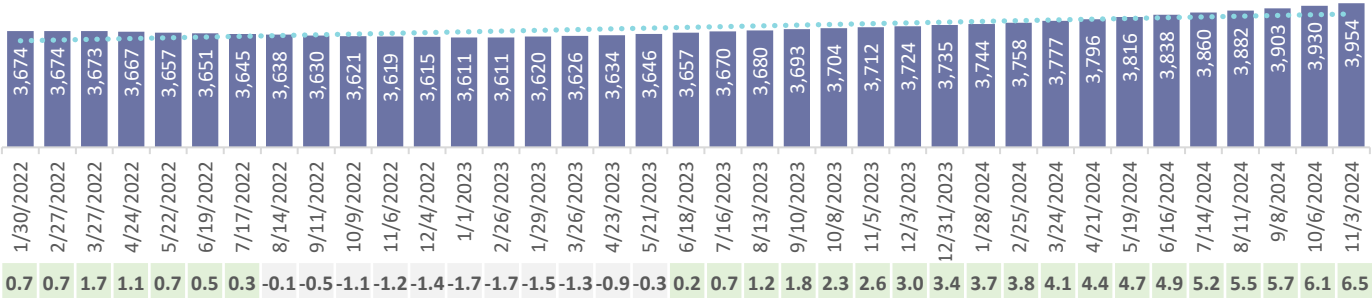


## Rolling 52 Weeks Volume Trend

Yogurt's 52-week rate of volume growth continues to accelerate.

\$11.1B latest 52 wks  
+7.4% vs Yago

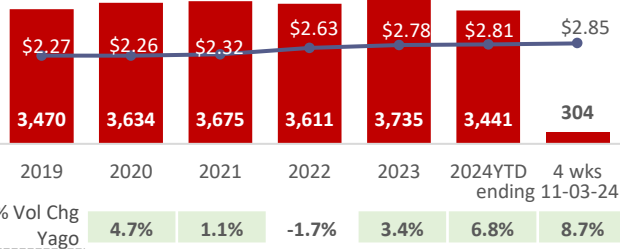
### RETAIL YOGURT VOLUME (M Pints) and % CHANGE VS YEAR AGO



## Calendar Year Volume and Price Trend

### TOTAL RETAIL YOGURT

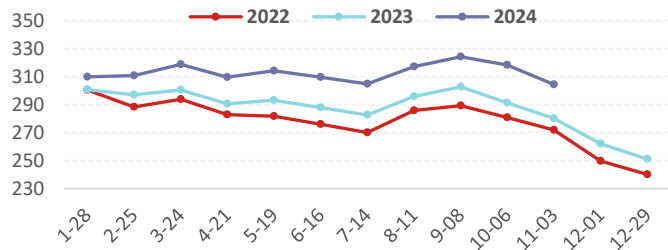
Vol. Sales (M Pints) Avg. Price/Pint



## Quad-week Sales View

### YOGURT RETAIL VOLUME, Million Pints

By 4-Week Periods



## Purchase Dynamics

Increased penetration and an increasing buy rate are fueling volume growth.

How did buying behavior change over the last 52 wks

Penetration  
82.4% of households  
bought milk  
+0.6 pts. Vs Yago

Buy Rate  
38.5 pints per buyer  
+6.0% vs Yago

Purchase Frequency  
16.1X/yr  
+5.5% vs Yago

Volume per Trip  
2.4 pints  
+0.5% vs Yago

## Regional Volume Trend

All regions continue to post growth.

% Chg vs Yago	Volume Index	Latest 52 Wks	2024YTD	4 Wks
TOTAL U.S.	100	6.5%	6.8%	8.7%
California	94	4.5%	4.9%	7.3%
Great Lakes	99	7.0%	7.2%	10.0%
Mid-South	98	7.7%	7.9%	9.6%
Northeast	113	5.8%	6.0%	6.4%
Plains	105	7.3%	7.4%	10.1%
South Central	79	6.6%	7.2%	11.5%
Southeast	102	8.0%	8.1%	7.8%
West	108	5.9%	6.2%	9.3%

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## Yogurt Segments Volume Trend

-- % Chg vs Yago --

	52 Wk Volume (M gal)	52 Wk Vol Share	52 Wks	2024YTD	4 Wks
TOTAL U.S.	3,952.4	100.0%	6.5%	6.8%	8.7%
Traditional	1,993.5	50.4%	-0.6%	-0.6%	2.4%
Greek	1,783.4	45.1%	16.2%	16.6%	16.8%
Australian	60.5	1.5%	-0.4%	0.4%	-2.7%
Icelandic	51.2	1.3%	22.6%	24.4%	31.5%
Alternative	63.8	1.6%	-4.1%	-3.8%	-3.9%

## Yogurt Segments Pricing Trend

-- Avg Price/Gal--

-- % Chg vs Yago --

	52 Wks	2024YTD	4 Wks	52 Wks	2024YTD	4 Wks
TOTAL U.S.	\$2.81	\$2.80	\$2.85	1.0%	1.0%	2.3%
Traditional	\$2.42	\$2.41	\$2.46	1.8%	1.8%	2.7%
Greek	\$3.07	\$3.07	\$3.11	-1.5%	-1.4%	0.4%
Australian	\$3.90	\$3.86	\$4.13	-0.4%	-0.9%	1.0%
Icelandic	\$4.76	\$4.75	\$4.81	1.0%	1.0%	1.1%
Alternative	\$4.92	\$4.92	\$5.03	0.9%	1.1%	4.1%

## Volume Trends by Fat Content

76% of yogurt volume is 1% and fat free.

	Volume % Chg vs Yago			Volume Share 52 Weeks
	52 Wks	2024YTD	4 Wks	
Total Yogurt	6.5%	6.8%	8.7%	100.0%
Whole Fat	9.3%	10.0%	14.1%	22.4%
2%	26.4%	26.8%	31.9%	1.9%
1%	0.6%	0.9%	3.5%	40.5%
Fat Free	11.3%	11.2%	10.4%	35.1%

Penetration (% Households that purchased in latest 52 wks)  
Total 82.3%; Whole 48.7%; 2% 10.6%; 1% 63.3%; FF 59.6%

## Volume Share and Trend by Outlet

	% Volume Chg vs Yago	Latest 52 Wks	2024YTD	4 Wks
TOTAL U.S.	6.5%	6.8%	8.7%	
Grocery	4.9%	5.3%	7.3%	
Supercenters, Club, Other	8.7%	8.9%	10.6%	
C-Store	-0.7%	-1.6%	-1.5%	
Drug	-7.6%	-5.6%	7.3%	

## Yogurt Packaging

Larger tubs and drinks posting very strong growth in latest 4 wks.  
Volume Share, 52 Wks

	Total	Cups	Tubs	Drinks	Tubes	All Other
% Volume Chg vs Yago						
52 wks	6.5%	3.0%	14.8%	7.2%	-5.7%	7.6%
2024YTD	6.8%	3.1%	15.0%	7.8%	-4.9%	7.5%
4 wks	8.7%	3.2%	18.4%	15.7%	-6.2%	6.0%

## Share and 52 Wk Growth

	Vol. Share	Vol. % Chg
Total Cups	100.0%	3.0%
4.01-6oz MP	46.4%	7.5%
4.01-6oz SS	36.9%	1.0%
2.1-4oz MP	13.6%	-7.1%
Total Drinks	100.0%	7.2%
2.1-4ozMP	50.9%	-3.9%
6.01-8oz MP	16.1%	16.6%
6.01-8oz SS	12.5%	24.0%
48.01-64ozMS	4.9%	18.1%

## Yogurt Claims

Organic & low sugar claims are growing at a fast pace.

Volume Share of Yogurt, 52 Wks

	Total	Organic	No, Low, Less Sugar
100.0%	6.8%	10.0%	

% Volume Chg vs Yago

	52 wks	2024YTD	4 wks
Total	6.5%	15.0%	21.3%
Organic	6.8%	14.7%	21.0%
No, Low, Less Sugar	8.7%	11.3%	25.4%

## New Product Spotlight



USA (Nov '24)  
Lala Yogurt smoothie line with probiotics, 25g protein, 6g fiber, real fruit and no added sugar.

Source: Innova



USA (Nov '24)  
Walmart Great Value Low fat yogurt pouches featuring the Minions.



USA (Nov '24)  
General Mills Ration Trio (reformulation, previously Ratio Keto)  
Product highlights combination of 15g protein, 3g carbs and 1g sugar.