CALIFORNIA MILK ADVISORY BOARD

CA Yogurt Insights and Market Dynamics

UC DAVIS

6-15-26

CALIFORNIA

- CA IS A LEADING PRODUCER OF MILK, BUTTER, ICE CREAM AND NF DRY MILK IN THE NATION
- CA IS THE 2ND LARGEST PRODUCER OF YOGURT IN THE COUNTRY (440M LBS+ / YEAR)
- Today, over 250 Yogurt items have the Real California Milk Seal!

Agenda

- California yogurt market dynamics and consumer insights
- Key growth segments: High-protein, low-sugar; functional/probiotic, lactose free and fiber +
- Consumer drivers: white space opportunities for innovation

HOW DO CONSUMERS SHOP YOGURT?

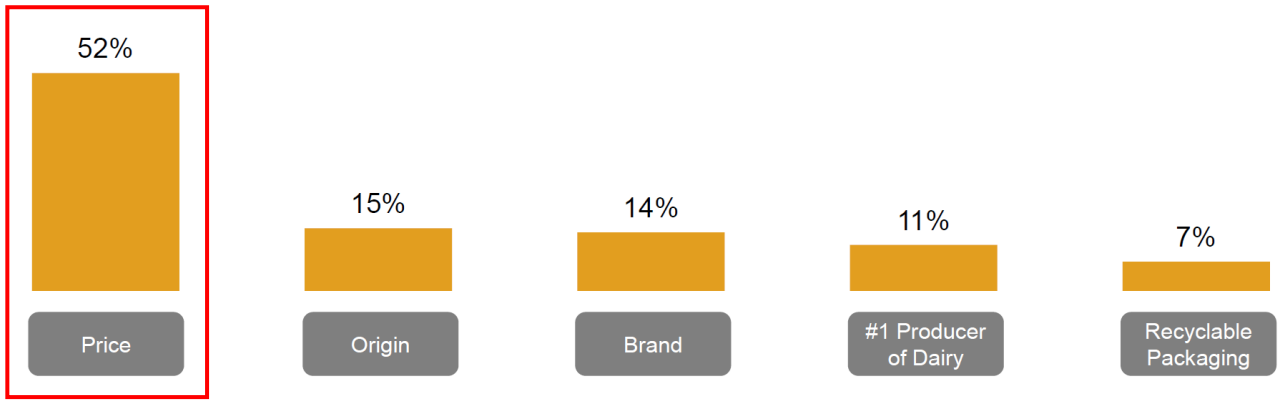
BRAND

PRICE

BRAND AND PRICE RANK HIGH, BUT ORIGIN IS ALSO IMPORTANT

Price is by far the top factor when choosing a milk brand. The remaining attributes are fairly equal in importance, with Origin and Brand virtually tied.

Relative Ranking of Attributes (Conjoint): Milk



Base: Total Milk (n=397)
Q6 Based on the information on the packages below, which of the [INSERT PRODUCT & DESCRIPTION ASSIGNED] products would you be most likely to buy?)

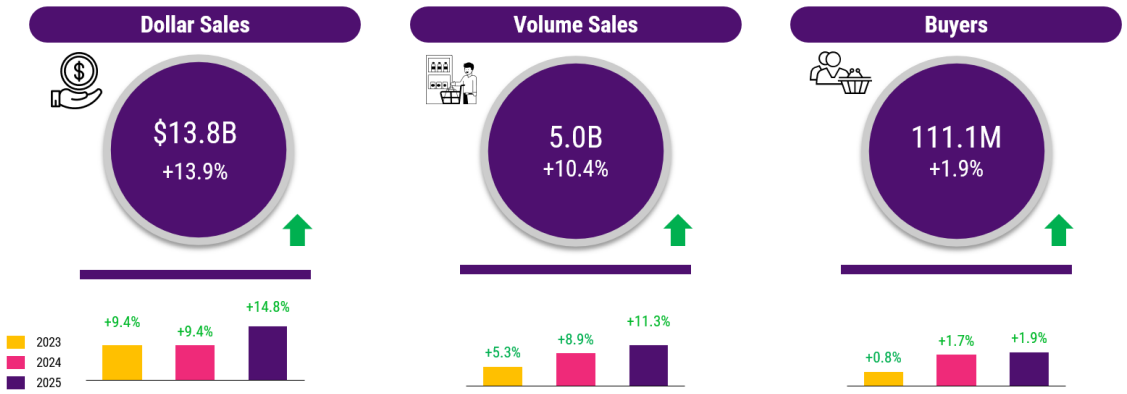
Summary of Product Relative Ranking

Relative Ranking of Attributes (Conjoint)

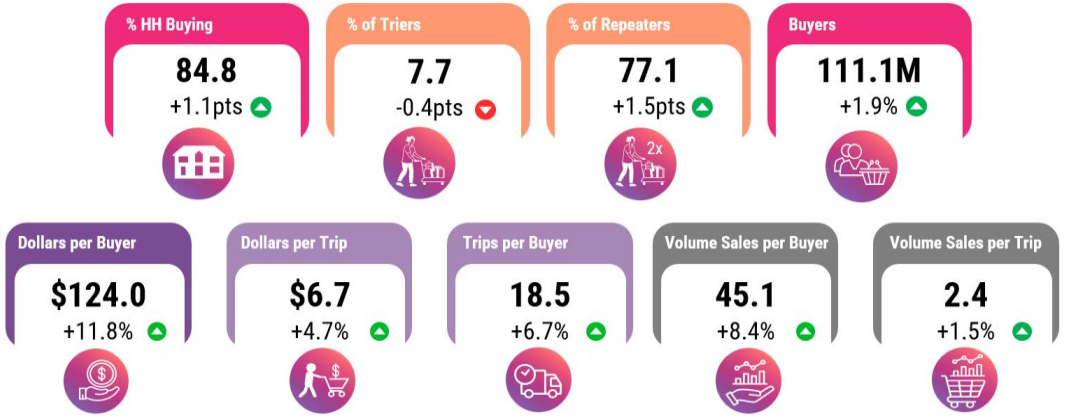
	Price	Brand	Origin	#1 Producer of Dairy	Recyclable
Total	43%	26%	15%	9%	7%
Milk	52%	14%	15%	11%	7%
Cheese	40%	30%	15%	7%	7%
Yogurt	30%	31%	20%	10%	9%
Butter	55%	24%	11%	5%	5%
Ice Cream	38%	31%	13%	10%	7%

CIRCANA: DOLLAR, VOLUME, BUYER PERFORMANCE

YOGURT $, VOLUME, AND BUYERS ALL INCREASING



PURCHASE DYNAMICS: $ GROWTH DRIVEN BY MORE BUYERS, DOLLARS PER TRIP, AND FREQUENCY



Yogurt buyers index high with Millenials, Gen X, Boomers and Seniors & Retirees (born before 1946), but not GEN Z.

Generation Z (Born 1997 and After)

Dollar Index	Buyer Index
79	97
Cottage Cheese	Cream/Creamers
▲ $49.3M (+54.9%)	▲ $207.1M (+38.8%)

Millennials (Born 1981-1996)

Dollar Index	Buyer Index
102	100
Cottage Cheese	Yogurt
▲ $522.6M (+20.0%)	▲ $4,930.1M (+12.7%)

Generation X (Born 1965-1980)

Dollar Index	Buyer Index
102	100
Cottage Cheese	Yogurt
▲ $661.3M (+20.5%)	▲ $4,040.3M (+14.7%)

Boomers (Born 1946-1964)

Dollar Index	Buyer Index
101	101
Cottage Cheese	Yogurt
▲ $864.0M (+17.4%)	▲ $3,887.9M (+13.8%)

Seniors & Retirees (Born Before 1946)

Dollar Index	Buyer Index
84	100
Cottage Cheese	Yogurt
▲ $113.0M (+9.2%)	▲ $403.6M (+2.1%)

Source: IRI Panel, Total US All Outlet, Latest 52 weeks ending March 22, 2026, NBD Dol Applied

Dairy15 Categories

- **YOGURT** IS THE 3RD LARGEST DAIRY CATEGORY AT $13.3B AND GROWING +12.6%
- ONLY COTTAGE CHEESE IS OUTPACING YOGURT AT +17.2%

Natural Cheese	Total Milk	Yogurt	Fz Novelties	Ice Cream/Sherbet
$20.9B +0.3%	$20.5B +1.2%	$13.3B +12.6%	$9.3B +3.8%	$8.7B +0.4%

Creams/Creamers	Butter/Butter Blends	Processed Cheese	Cream Cheese	Rfg Whipped Toppings
$7.0B +1.6%	$5.8B -3.0%	$3.3B -4.2%	$2.9B -3.1%	$2.6B +1.8%

Rfg Dips	Cottage Cheese	Sour Cream	Margarine/Spreads	Rfg Desserts
$2.4B +2.3%	$2.1B +17.2%	$1.9B +0.9%	$1.5B -8.3%	$1.3B -0.6%

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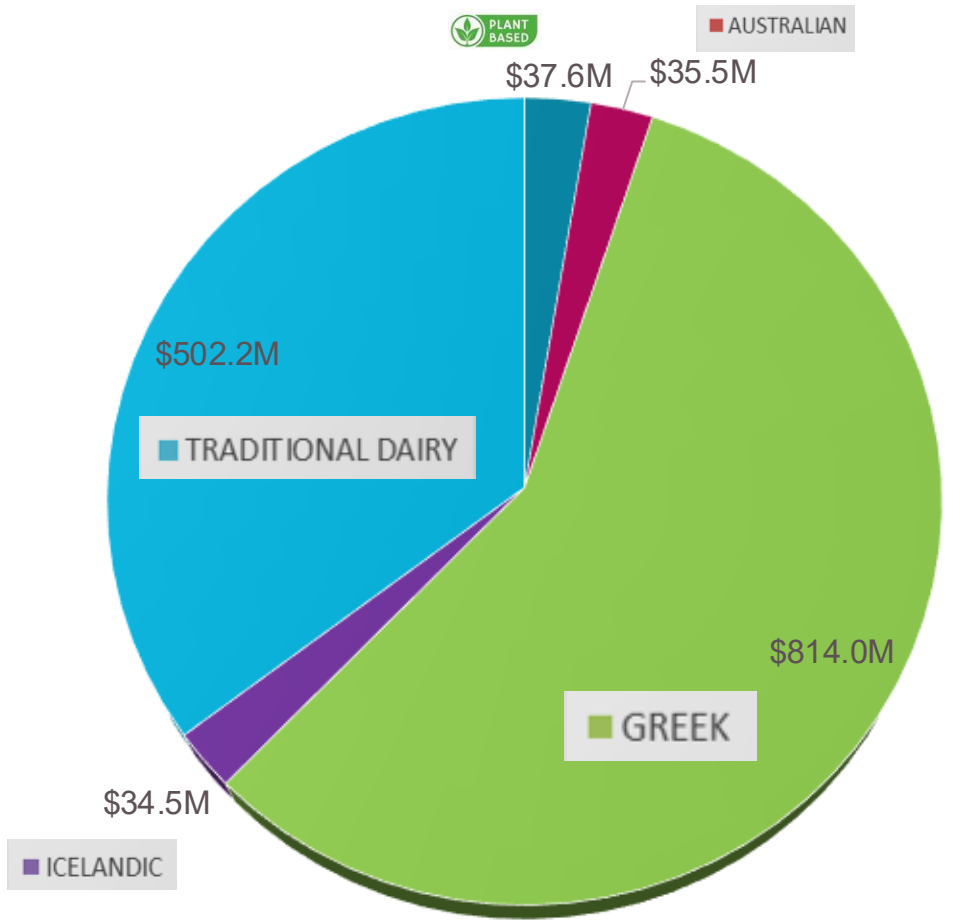
Source: Circana Total U.S. MULO+ w/C – 52 Weeks Ending Apr 19, 2026

YOGURT SEGMENT SHARE : 3yrs ago…

- 2023 Total US Sales = $10.3B, +9.5% VS PY
- Greek = 47% of TTL Cat
  - Outpacing traditional +13% vs +7%
- Traditional = 46% of TTL Cat
- Icelandic growing +12%
- Australian down -4%
- Alternatives down -1.3%

Source: Circana 52wks Ending 12/31/23

YOGURT SEGMENT SHARE: 2026



ALTERNATIVE AUSTRALIAN GREEK ICELANDIC TRADITIONAL

- LATEST 52WKS Total US Sales = $13.3B, +12.6% VS PY
- Greek is now **57%** of TTL Cat
  - +23.3% vs PY
  - YTD, growing at +16.8%
- Traditional is now 35% of TTL Cat
  - -0.1% vs PY
  - YTD, +1%
- Icelandic growing +40.4%
- Australian +3.5%
- Alternatives +6.7%

Source: TTL US MULO Circana 52wks Ending 12/31/25

YOGURT SEGMENTS: 3YR TREND ($ SHARE)

		% DoI Share of Yogurt			
Type	Product	2023	2024	2025	YTD 2026 Ending 05-24-26
Yogurt Type	ALTERNATIVE YOGURT	3%	3%	3%	3%
Yogurt Type	AUSTRALIAN YOGURT	3%	3%	2%	2%
Yogurt Type	GREEK YOGURT	49%	52%	57%	60%
Yogurt Type	ICELANDIC YOGURT	2%	2%	2%	3%
Yogurt Type	TRADITIONAL DAIRY YOGURT	44%	40%	35%	33%

- GREEK IS NOW 60% OF TTL CATEGORY, WHILE TRADITIONAL CONTINUES TO DECLINE

Source: TTL US MULO Circana 52wks Ending 12/31/25

YOGURT SEGMENTS: 3YR TREND ($ % CHG)

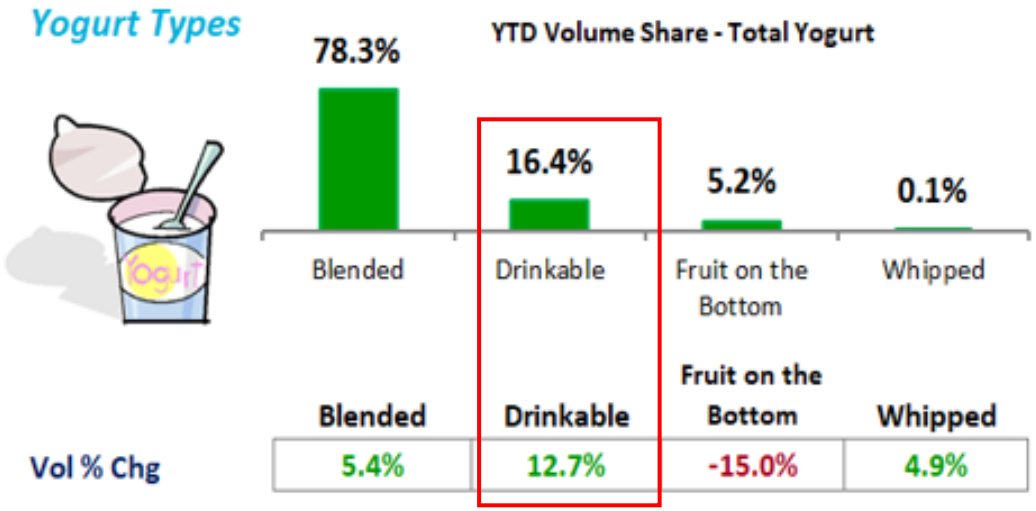
		Dollar Sales % Change vs YA			
Type	Product	2023	2024	2025	YTD 2026 ENDING 5-24-26
Yogurt Type	ALTERNATIVE YOGURT	-4.8%	-1.0%	6.7%	9.3%
Yogurt Type	AUSTRALIAN YOGURT	-1.6%	-3.0%	3.5%	-2.0%
Yogurt Type	GREEK YOGURT	13.9%	15.7%	23.3%	16.8%
Yogurt Type	ICELANDIC YOGURT	10.5%	31.9%	40.4%	30.7%
Yogurt Type	TRADITIONAL DAIRY YOGURT	1.4%	-2.4%	-0.1%	1.0%

- ALT YOGURTS MAKING A COMEBACK. YTD +9.3%
- ICELANDIC IS THE FASTEST GROWING SEGMENT : +40.4% IN 2025!
- GREEK CONTINUES TO SEE STRONG GROWTH: +23.3% IN 2025

Source: TTL US MULO Circana 52wks Ending 12/31/25

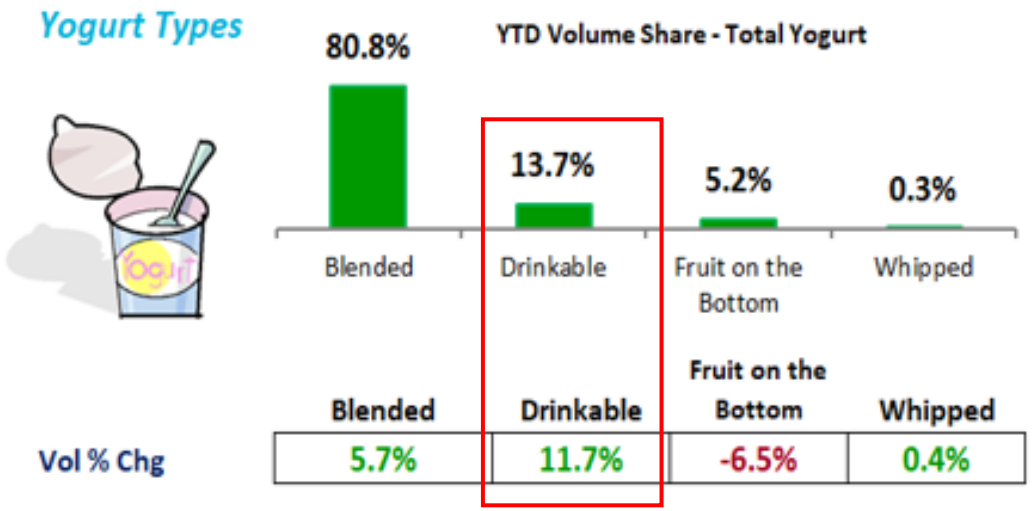
DRINKABLE FORMS GAINING

CA



Vol % Chg	Blended	Drinkable	Fruit on the Bottom	Whipped
	5.4%	12.7%	-15.0%	4.9%

US



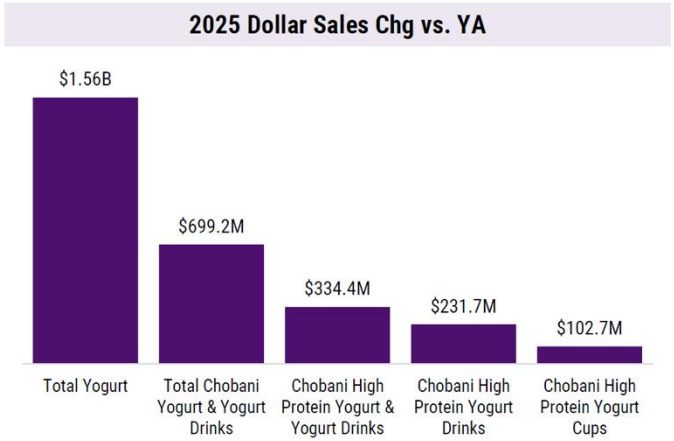
Vol % Chg	Blended	Drinkable	Fruit on the Bottom	Whipped
	5.7%	11.7%	-6.5%	0.4%

- DRINKABLE YOGURTS – DOUBLE DIGIT VOLUME SHARE GAINS
- FRUIT ON THE BOTTOM – DOWN SIGNIFICANTLY
- WHIPPED FORMATS RESONATING IN CA

Source: DMI Q1 DATA – 1/25/26- 03/22/26 (CA MULO, TTL US MULO)

BRAND/PACKAGING COMMUNICATION ARE CHANGING RAPIDLY TO MEET TODAY'S CONSUMER DEMAND

In late 2024, Chobani rebranded their Complete yogurt line. Their new High Protein line drove 21% of category growth, 48% of total Chobani yogurt growth in 2025.



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Chobani®

Calendar Year 2025
Geography: Total US – Multi Outlet+ with Conv

REAL CALIFORNIA MILK

CHOBANI LEADS ALL YOGURT BRANDS IN GROWTH

New packaging puts Protein in the forefront vs. Chobani Complete

Chobani High Protein yogurt delivers on some of the most top of mind health benefits:

- 15-30g of Protein per unit
- 0g of Added Sugar
- Lactose Free
- Only Natural Ingredients

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Circana, Inc. and Circana Group, L.P. | Proprietary and confidential

CATEGORY RANK	TOP BRANDS	Dollar Sales	Dollar Sales % Change vs YA
1	CHOBANI RFG YOGURT	$2,764,994,940	20.0%
2	DANNON RFG YOGURT	$2,360,535,727	8.7%
3	PRIVATE LABEL RFG YOGURT	$1,582,104,933	15.4%
4	YOPLAIT RFG YOGURT	$1,270,923,120	-0.4%
5	DANNON RFG YOGURT DRINKS	$664,458,885	13.5%
6	CHOBANI RFG YOGURT DRINKS	$624,880,905	**+73.2%**
7	FAGE RFG YOGURT	$605,512,726	17.8%
8	STONYFIELD ORGANIC RFG YOGURT	$465,033,634	15.7%
9	NOOSA RFG YOGURT	$274,583,465	9.7%
10	SIGGIS RFG YOGURT	$242,504,488	38.1%

* Source: Circana 52wks US MULO+C, wk ending 12-28-25

REAL CALIFORNIA MILK

Lactose Free, Low Sugar and Gluten Free claims continue to thrive. Digestive claims slip out of the top 10. Protein and Organic still strong.

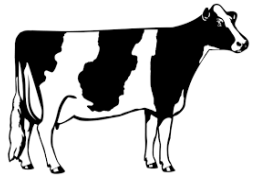
Notable declining claims include Sodium No/Low/Less **-24.2%**, Fiber High/Source/More **-18.9%** and Trans Fat No/Low **-15.3%**,

No Added Sweetener

$ Sales	$ % Chg
$1,516M	+36.8%

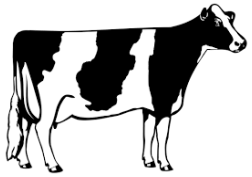
No / Low / Less Sugar

$ Sales	$ % Chg
$6,572M	+33.7%



Grass Fed Diet

$ Sales	$ % Chg
$1,427M	+17.5%



Humanely Raised

$ Sales	$ % Chg
$1,645M	+14.8%

Protein Hi / Source / More / Other

$ Sales	$ % Chg
$10,251M	+14.1%

Natural Sweetener

$ Sales	$ % Chg
$3,132M	+9.0%

No / Reduced Lactose

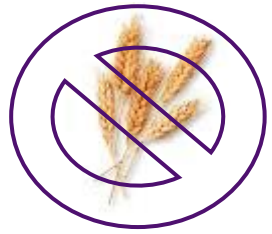
$ Sales	$ % Chg
$5,010M	+7.7%

Antibiotics No / No Added / Not Treated With

$ Sales	$ % Chg
$1,254M	+7.6%

Organic 100% USDA Certified

$ Sales	$ % Chg
$4,998M	+7.2%



Gluten Free

$ Sales	$ % Chg
$9,259M	+5.6%

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SUGAR CLAIMS IMPACT ON SALES

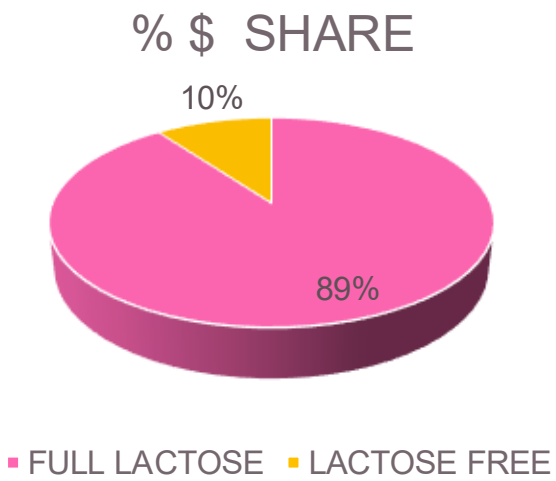
		Dollar Sales % Change vs YA			
Type	Product	2023	2024	2025	YTD 2026 Ending 05-24-26
Sugar Content	NO SUGAR	49.9%	3.1%	-21.2%	49.8%
Sugar Content	LESS SUGAR	8.9%	-0.1%	14.3%	29.9%
Sugar Content	NO SUGAR ADDED	30.1%	33.5%	57.9%	37.3%
Sugar Content	UNSWEETENED	-8.4%	-13.9%	-9.6%	0.6%
Sugar Content	MADE WITH SUGAR	3.8%	10.8%	8.9%	12.2%
Sugar Content	OTHER SWEETENER CLAIM	3.1%	-0.1%	11.1%	2.5%

- NO SUGAR AND UNSWEETENED SALES ARE DECLINING
- NO SUGAR ADDED CLAIM IS RESONATING! +57.8% INCREASE IN SALES VS PY

Source: TTL US MULO Circana 52wks Ending 12/31/25

LACTOSE VS LACTOSE FREE

		% DoI Share of Yogurt				Dollar Sales % Change vs YA			
Type	Product	2023	2024	2025	YTD 2026 Ending 05-24-26	2023	2024	2025	YTD 2026 Ending 05-24-26
Lactose Content	FULL LACTOSE YOGURT	93%	93%	89%	87%	5.5%	6.7%	9.0%	5.7%
Lactose Content	LACTOSE FREE/REDUCED YOGURT	7%	7%	10%	13%	31.9%	10.7%	69.4%	60.4%



- LACTOSE FREE YOGURTS SALES SHOWING HIGH GROWTH! +69.4% IN 2025

Source: TTL US MULO Circana 52wks Ending 12/31/25

FAT LEVELS MATTER

CA

YTD	Vol % Chg	Volume Share
Regular	10.0%	26.0%
Reduced	-0.1%	1.7%
Low	9.5%	36.3%
Fat Free	-1.5%	36.1%

US

YTD	Vol % Chg	Volume Share
Regular	12.3%	24.0%
Reduced	0.5%	2.0%
Low	6.9%	38.5%
Fat Free	0.8%	35.5%

- FULL FAT YOGURTS VOLUME CHANGE: +10% IN CA, +12.3% IN TTL US
- LOW FAT VARIETIES ALSO RESONATING WITH CONSUMERS: +9.5% IN CA, +6.9% TTL US

Source: DMI YTD DATA – ENDING 03/22/26 (CA MULO, TTL US MULO)

Yogurt | Top Flavors

Vanilla is the top flavor for Yogurt with 20.1% share followed by Fruit Blend with 17.6%, Non-Flavored with 16.3% and Strawberry with 13.8% share.

Top Flavor Detail	Dollar Sales				Volume Sales		Unit Sales	
	Share	Pt change vs YA	Sales (M)	% Change vs YA	Sales (M)	% Change vs YA	Sales (M)	% Change vs YA
Vanilla	20.1%	+0.1pts	$2,451.7	+13.3%	$767.6	+7.1%	$712.7	+5.6%
Fruit Blend	17.6%	+0.1pts	$2,140.3	+13.6%	$795.5	+6.9%	$496.1	+11.3%
Non-Flavored	16.3%	+1.3pts	$1,979.6	+22.1%	$668.5	+17.7%	$482.9	+13.7%
Strawberry	13.8%	-1.0pts	$1,682.9	+5.3%	$539.9	+1.1%	$634.6	+0.5%
All Other Flavor/Scent	5.2%	+0.5pts	$630.4	+26.0%	$222.1	+19.5%	$245.9	+0.2%
Berry	4.5%	+0.2pts	$546.3	+18.8%	$142.7	+12.4%	$222.1	+5.4%
Peach	3.9%	-0.3pts	$469.4	+5.0%	$142.7	-1.0%	$276.7	+0.6%
Cherry	2.7%	-0.0pts	$333.2	+11.7%	$103.0	+6.2%	$185.9	+4.9%
Blueberry	2.3%	-0.3pts	$276.2	+0.8%	$82.1	-2.6%	$166.0	-4.1%
Lime	1.6%	-0.1pts	$197.8	+4.4%	$52.4	-0.0%	$113.2	-2.4%
All Others	12.1%	-0.6pts	$1,474.2	+7.5%	$403.6	+4.1%	$795.7	+3.2%

Source: Circana Total U.S. MULO+w/C – 52 Weeks Ending Apr 19, 2026

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Agenda

- California yogurt market dynamics and consumer insights
- Key growth segments: High-protein, low-sugar; functional/probiotic, lactose free and fiber +
- Consumer drivers: white space opportunities for innovation

WHITE SPACE OPPORTUNITIES

PRIVATE LABEL

ELEVATE CLAIMS
- PROTEIN
- LOW SUGAR

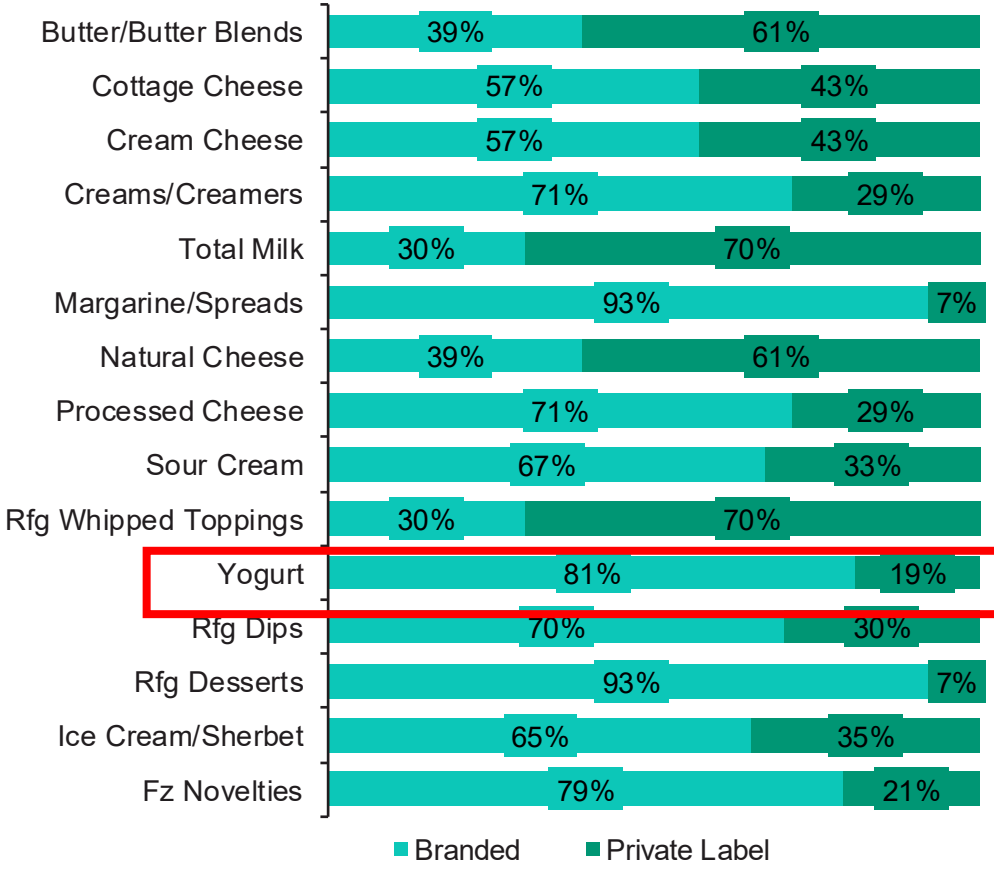
PROTEIN +
- +FIBER
- +PROBIOTICS
- +ADAPTOGENS

ORGANIC
REGENERATIVE
GRASSFED
A2
LACTOSE FREE

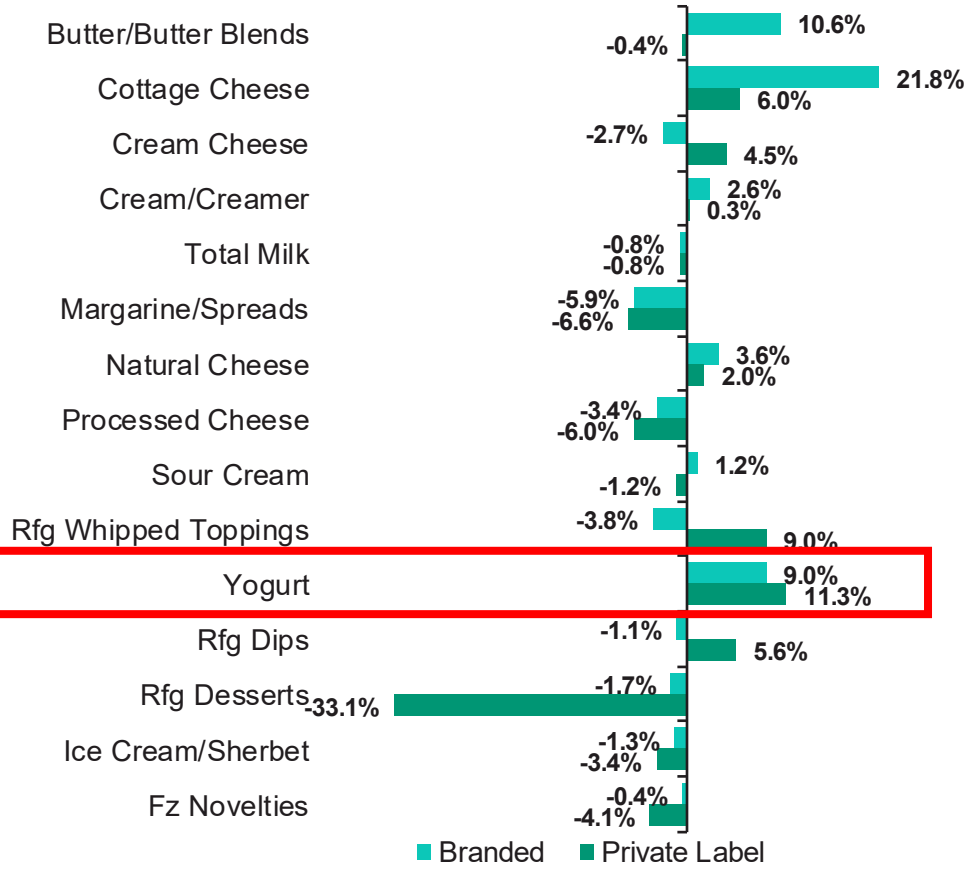
DRINKABLES + POUCHES

In volume, PL Yogurt has a 19% share vs NB. PL volume is growing faster than NB

Dairy15 Branded vs. PL Vol Share



Dairy15 Branded vs. PL Vol % Change vs. YA



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Retailer's Private Label Push

Aldi announced plans to eliminate dozens of additional artificial ingredients from its PL assortment by 2027 to focus on **simpler ingredients while maintaining value**.

Article here

Walmart is investing more than $350M to expands its private label milk processing footprint to supply more than 650 Walmart stores and Sam's Clubs.

Article here & here

Dairy15 Category	PL Vol % Chg	Brand Vol % Chg
Yogurt	10.2%	6.7%

Article here

Data Source: Circana POS, Total US MULO+ w/Conv, 52 WE 4/19/2026

PROTEIN PRODUCTS IN DAIRY SEEING HIGHER GROWTH

Dairy Milk | Category vs Protein Dollar Sales

Dairy Milk category grew by +3.7% while Dairy Milk with Protein saw steeper growth of +15.6% in the L52W. Missed opportunity with only 9.2% of sales having Protein Claims.

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Circana OmniMarket™ Core Outlets, Total U.S. MULO+ w/Convenience, 52 Weeks Ending Nov 02, 2025

Yogurt | Category vs Protein Dollar Sales

Yogurt category experienced robust growth over the last 52 weeks, with products featuring Protein driving significant momentum and delivering strong double-digit gains. Missed opportunity with only 1.9% of sales having Protein Claims.

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Circana OmniMarket™ Core Outlets, Total U.S. MULO+ w/Convenience, 52 Weeks Ending Nov 02, 2025

PROTEIN CLAIMS – MISSED OPPORTUNITY!

$17.7B

9.2%

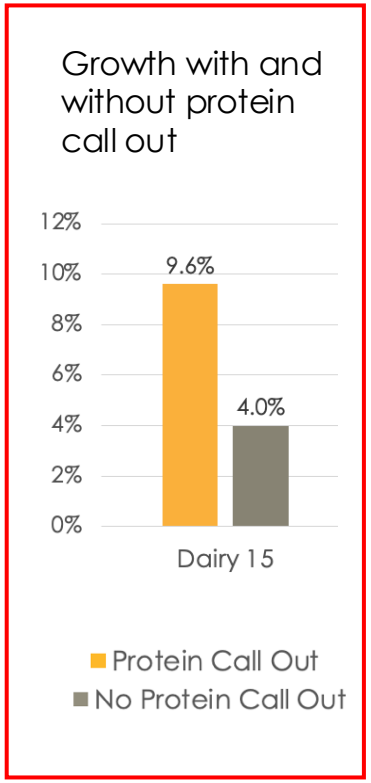
$12.7B

1.9%

$2B

10.2%

% of sales with protein claims:



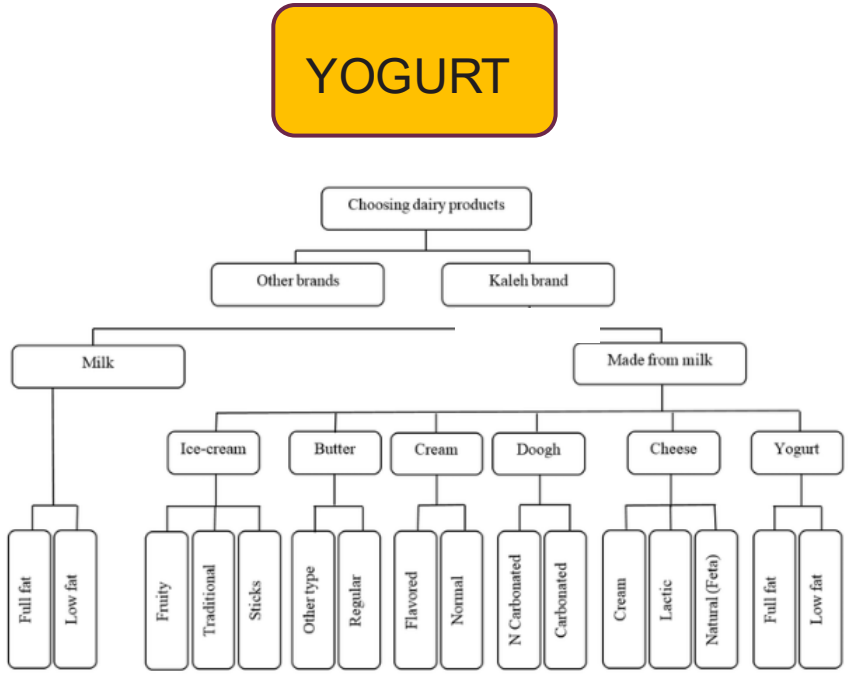
FIBER CLAIMS IN YOGURT DRIVE SALES

		% Dol Share of Yogurt				Dollar Sales % Change vs YA			
Type	Product	2023	2024	2025	YTD 2026 Ending 05-24-26	2023	2024	2025	YTD 2026 Ending 05-24-26
Fiber Content	MORE FIBER	0%	0%	0%	0%	0.6%	-4.6%	-88.9%	-100.0%
Fiber Content	OTHER FIBER CLAIM	1%	1%	1%	1%	40.2%	44.7%	58.5%	34.1%
Fiber Content	NOT STATED ON PACKAGE	83%	82%	82%	82%	6.2%	5.8%	12.4%	11.7%
Fiber Content	VARIETY PACK	14%	14%	15%	14%	10.1%	11.6%	15.4%	0.4%
Fiber Content	N/A	2%	3%	3%	3%	9.7%	13.7%	18.4%	33.4%

- Fiber Yogurts are a small segment but growing fast

Source: TTL US MULO Circana 52wks Ending 12/31/25

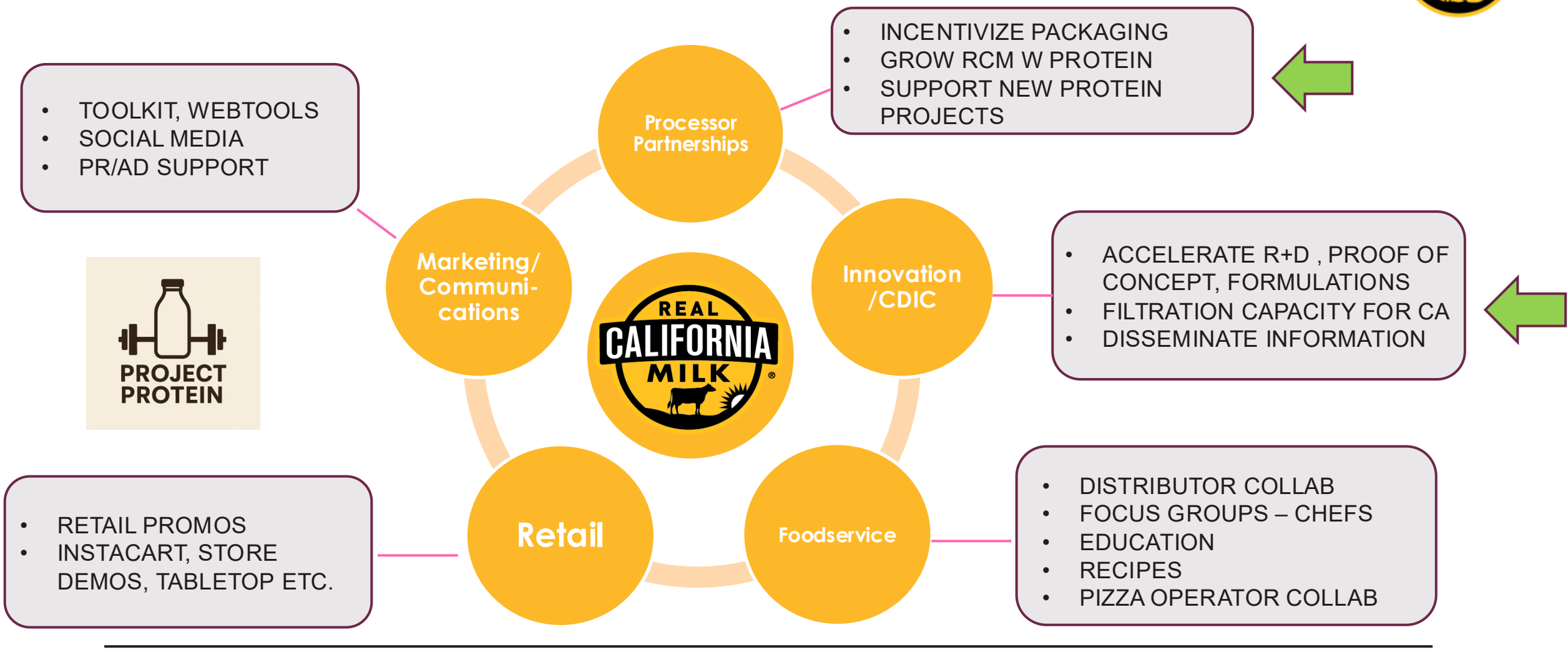
THE CONSUMER DECISION TREE - YOGURT



WHAT'S RESONATING: GREEK, FULL FAT, PROTEIN, LOW SUGAR, LACTOSE FREE, FIBER, DRINKABLE FORMATS

WHAT'S NOT: TRADITIONAL, FF, SUGAR

HOW CMAB CAN SUPPORT YOGURT GROWTH?



THANK YOU

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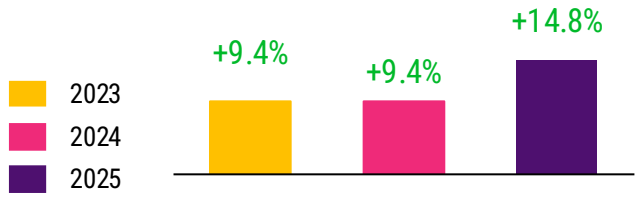
Appendix

Dollar, Volume and Buyer Performance

Yogurt experienced growth in both dollar and volume sales along with increased buyers in the latest year.

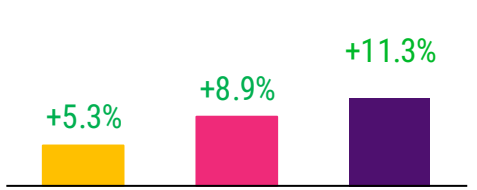
Dollar Sales

$13.8B
+13.9%



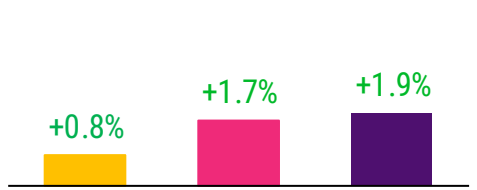
Volume Sales

5.0B
+10.4%



Buyers

111.1M
+1.9%



Source: IRI Panel, Total US All Outlet, Latest 52 weeks ending March 22, 2026, NBD DoI Applied

Purchase Dynamics

Dollar growth was driven by increased buyers, penetration, repeaters, dollars per trip, trips per buyer, volume sales per buyer and per trip.

% HH Buying
84.8
+1.1pts

% of Triers
7.7
-0.4pts

% of Repeaters
77.1
+1.5pts

Buyers
111.1M
+1.9%

Dollars per Buyer
$124.0
+11.8%

Dollars per Trip
$6.7
+4.7%

Trips per Buyer
18.5
+6.7%

Volume Sales per Buyer
45.1
+8.4%

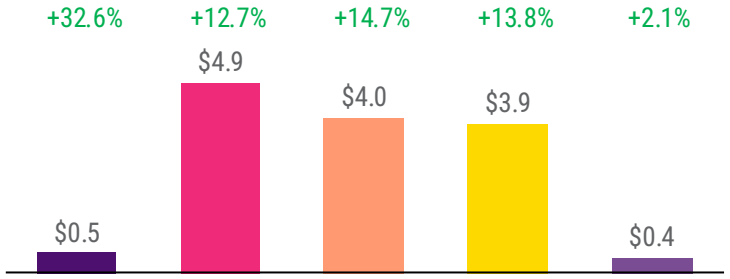
Volume Sales per Trip
2.4
+1.5%

Source: IRI Panel, Total US All Outlet, Latest 52 weeks ending March 22, 2026, NBD Dol Applied

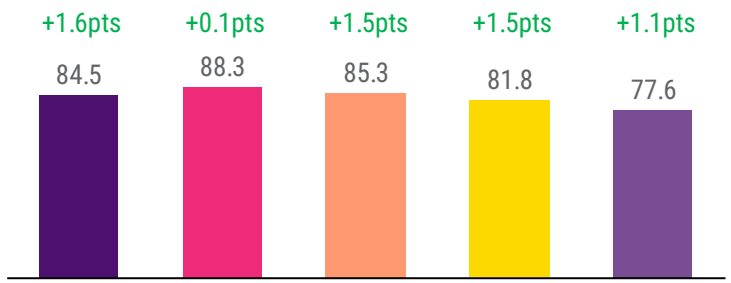
Purchase Dynamics by Generation

In Yogurt, all generations increased in dollar sales, penetration and dollars per trip. However, Millennials and Seniors saw a decline in buyers count.

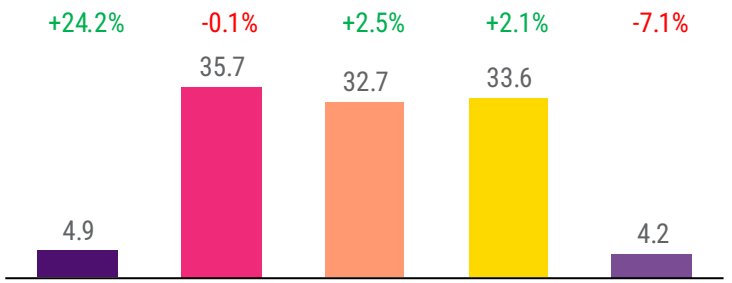
Dollar Sales ($B) & % Chg



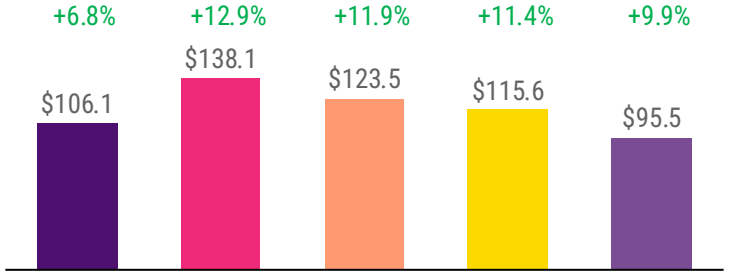
% HH Buying & Abs Chg



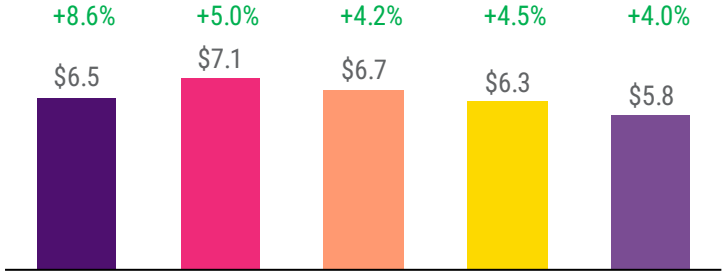
Buyers (M) & % Chg



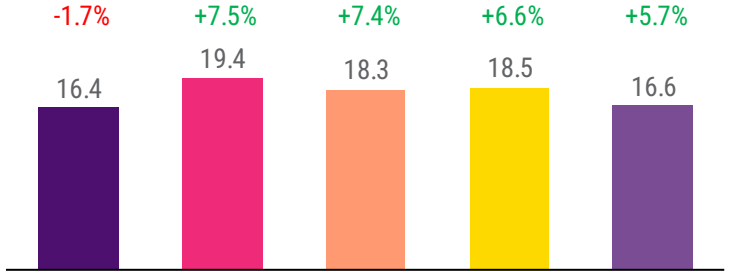
Dollar per Buyer & % Chg



Dollars per Trip & % Chg



Trip Per Buyer & % Chg

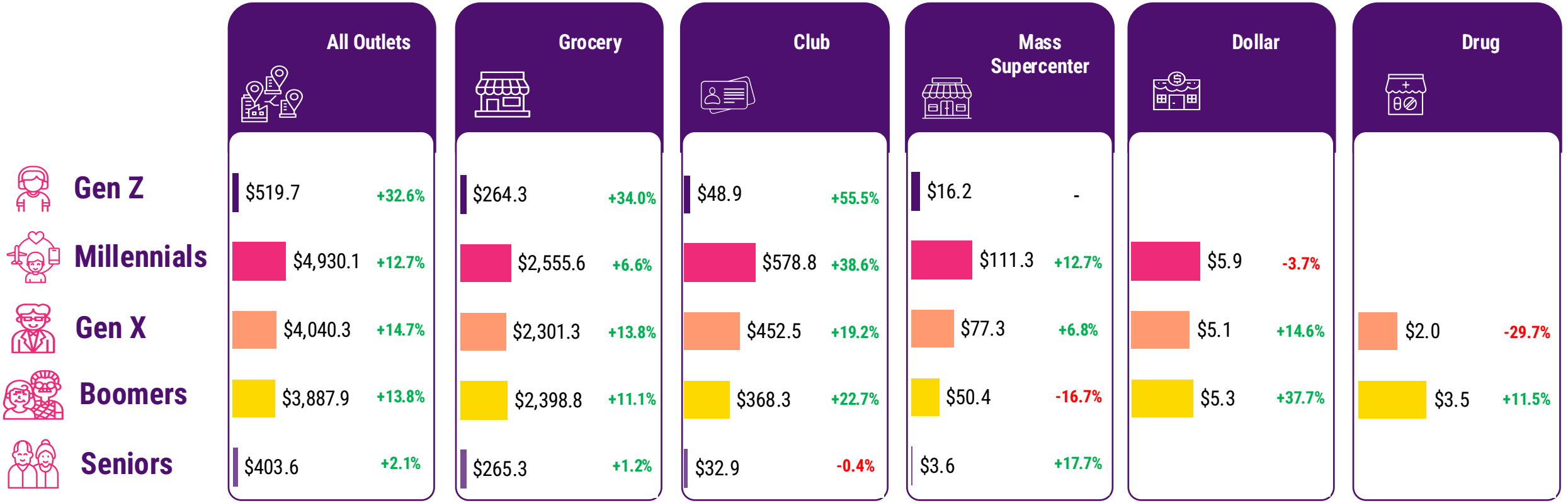


Generation Z (Born 1997 and After) | Millennials (Born 1981-1996) | Generation X (Born 1965-1980) | Boomers (Born 1946-1964) | Seniors and Retirees (Born Before 1946)

Source: IRI Panel, Total US All Outlet, Latest 52 weeks ending March 22, 2026, NBD DoI Applied

Dollar Performance across major Channels by Generation ($M)

All generations posted dollar sales growth in the Grocery channel, while Seniors were the only group to decline in Club. In the Mass channel, Millennials, Gen X, and Seniors experienced dollar growth.



Source: IRI Panel, Total US All Outlet, Latest 52 weeks ending March 22, 2026, NBD Dol Applied

Top Brands by Dollar Index across Generations & Dollar Sales ($M)

Brands leading the dollar index across generations include Yoplait Original for Gen Z, Yoplait Go Gurt Simply for Millennials, Lactalis Ratio Trio for Gen X, and Yoplait Light for Boomers and Seniors.

Gen Z

	$519.7	85
Yoplait Original	$33.6	127
Dannon Oikos Triple Zero	$47.4	106
Private Label	$60.4	80
Chobani	$82.3	66
Chobani Flip	$17.4	60

Millennials

	$4,930.1	116
Yoplait Go Gurt Simply	$25.8	247
Dannon Danimals Squeezables	$66.9	243
Yoplait Disney Frozen	$12.5	241
Stonyfield Organic Kids	$70.9	238
Dannon Danonino	$13.7	235
Dannon Danimals Smoothie Disney Pixar Incredibles 2	$22.6	228
Yoplait Go Gurt	$103.1	223
Yoplait Bluey	$20.3	220
Dannon Danimals Smoothie	**$157.7**	**217**
Dannon Danimals Smoothie Nickelodeon Paw Patrol	$40.6	217

Gen X

	$4,040.3	100
Lactalis Ratio Trio	$09.7	159
Dannon Oikos Pro	**$200.3**	**146**
El Mexicano Saborico	$28.4	141
Fage Bestself	$16.5	138
Yakult	$49.4	131
Ellenos	$07.2	129
Siggis	$94.2	123
Lactalis Ratio	$53.7	122
Silk	$31.4	120
Yoplait Protein	$09.2	120

Boomers

	$3,887.9	90
Yoplait Light	$27.8	163
Brown Cow	$12.0	145
Fage Total	**$237.8**	**127**
Yoplait Whips	$16.5	121
Dannon Activia	**$209.3**	**119**
Chobani Creations	$17.7	118
Dannon Light & Fit	**$183.2**	**117**
Yoplait Oui	$69.1	115
Cabot Creamery	$26.4	114
Tillamook	$13.7	113

Seniors

	$403.6	70
Yoplait Light	$04.0	179
Dannon Activia	**$29.1**	**125**
Yoplait Original	**$27.9**	**112**
Yoplait Whips	$01.9	103
Private Label	**$57.7**	**82**
The Greek Gods	$06.8	81
Chobani	**$90.0**	**78**
Yoplait Oui	$06.2	77
Fage Total	**$19.7**	**76**
Dannon Light & Fit	**$15.6**	**74**

Circana.

≥ 120	≥ 110 to < 120
≥ 80 to < 90	< 80

Source: IRI Panel, Total US All Outlet, Latest 52 weeks ending March 22, 2026, NBD DoI Applied

*Note: Brands in **Bold** feature in Top 10 list based on dollars for each generation.*
Top 50 brands under each generation based on dollar sales is picked (as it holds 80-90% share) and then sorted based on higher dollar index for each generation.

The Power of Protein: Market Dynamics

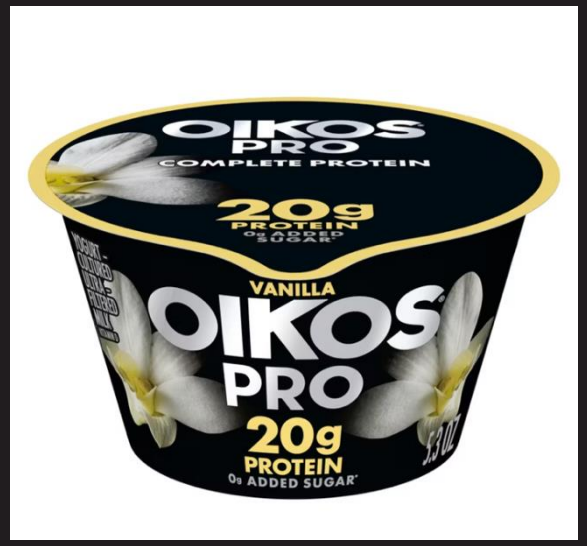
Protein has been the #1 top reasons to buy for the last 3 years. With rise of GLP-1 usage and acceptance, this macronutrient demand will only increase

8 of 15
Fastest growing foods are protein-rich

38%
Define healthy as "High Protein

54%
Actively adding protein to their diet

29%
Growth in protein products

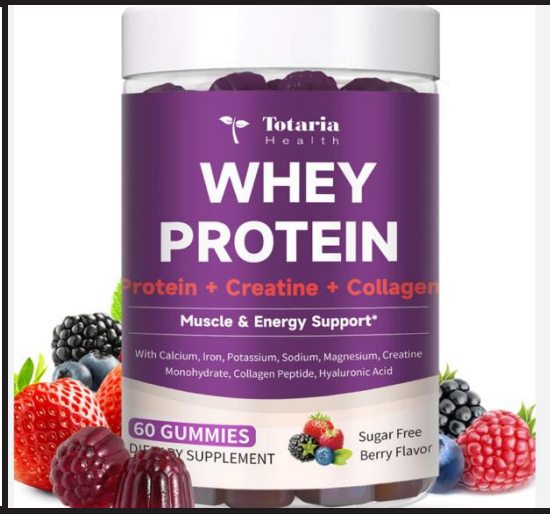


Sources: Protein Deep Dive, Innova, Expo West, Circana.

Enter the era of Protein +

Common Mashups

- Protein + Fiber (Satiety + gut)
- Protein + Probiotics (Absorption)
- Protein + Adaptogens (Mood/Energy)



YOGURT Q1 2026

Yogurt Segments

Yogurt: Icelandic, Alternative, Greek emerge as growth segments

Year-To-Date	Volume Sales (Pints)	Vol Share	Vol % Chg	Volume Change
Yogurt Total	118,941,750	100.0%	5.2%	5,911,244
Organic Yogurt	14,074,195	11.8%	10.1%	1,288,297
Australian	2,739,983	2.3%	9.2%	230,465
Icelandic	1,821,112	1.5%	40.9%	528,855
Alternative	1,655,017	1.4%	12.9%	188,509
Greek	66,268,979	55.7%	10.8%	6,479,666
Traditional	46,456,660	39.1%	-3.2%	-1,516,251
Single-Serve	25,176,111	21.2%	0.9%	218,340
Multi-Serve	42,742,395	35.9%	11.5%	4,406,721
Multi-Pack	51,025,459	42.9%	2.6%	1,288,399

* Due to Retailer data restrictions, product aggregates may be slightly under reported

Note: Each of the segments listed above are not mutually exclusive segments

What's in it (Some of the Flavors comprising the Top flavor groups)

Non-flavored	Fruit		Vanilla	Chocolate	Sweet	Nut & seed	Herb & spice	Mint	Hot / spicy
Regular	Strawberry	Watermelon	Vanilla	Oreo	Caramel macchiato	Coconut	Garlic	Other mint	Jalapeno
Plain	Mixed berry	Grape	French vanilla	Chocolate chip / chunk	Butter pecan	Almond	Cinnamon	Peppermint	Spicy habanero
Original	Peach	Apple	Vanilla bean		Caramel	Peanut	Onion	Spearmint	Hot & spicy
White in Milk Category	Banana	Cranberry	Homemade vanilla	Chocolate peanut butter	Cotton candy	Sesame	Other herb		Red bell pepper etc.,
	Raisin	Lime / Lemon			English toffee	Hazelnut			
Anything which is Other Sweet / Butter / Cream / Sugar in Butter & Creamer category style (French, Irish), source of milk (goat, sheep) or texture (creamy, extra creamy)	Blueberry	Pumpkin spice	Natural vanilla	Dark chocolate	Honey	Pecan	Ranch		
	Assorted fruit		Classic vanilla	Other chocolate etc,.,	Sweet	Pistachio	Other spice		**Mexican**
	Mango	And other fruits and Fruit blends Mixed fruits etc..	And Other Vanilla blends and Vanilla mix Flavors etc.,		Creme brulee	Other Nut & Seed varieties	Salt		Mexican
	Orange				Toffee		Pesto		Guacamole
	Fruit punch				Maple				Taco
	Cherry				Other Sweet				Chipotle
	Raspberry				etc.,				Chili lime
	Pineapple								Salsa
									etc,.,

Dollar Sales Performance across categories (1/2)

Except Butter Blend, top categories witnessed dollar growth in all households. Gen Z & Millennials grew across all categories while Seniors gained only in Yogurt.

Generations	All HH Generation		Generation Z (Born 1997 and After)		Millennials (Born 1981-1996)		Generation X (Born 1965-1980)		Boomers (Born 1946-1964)		Seniors and Retirees (Born Before 1946)	
	Dollar Sales	% Chg vs YA	Dollar Sales	% Chg vs YA	Dollar Sales	% Chg vs YA	Dollar Sales	% Chg vs YA	Dollar Sales	% Chg vs YA	Dollar Sales	% Chg vs YA
Total Dairy15	$106.1B	+3.8%	$3.7B	+25.1%	$33.6B	+4.7%	$31.7B	+3.6%	$33.4B	+2.3%	$3.7B	-6.2%
Natural Cheese	$21.9B	+1.9%	$0.8B	+24.4%	$7.3B	+2.6%	$6.9B	+1.5%	$6.3B	-0.0%	$0.6B	-7.3%
Total Milk	$20.6B	+3.1%	$0.8B	+29.1%	$7.3B	+3.8%	$5.8B	+1.5%	$6.0B	+2.1%	$0.7B	-6.2%
Yogurt	$13.8B	+13.9%	$0.5B	+32.6%	$4.9B	+12.7%	$4.0B	+14.7%	$3.9B	+13.8%	$0.4B	+2.1%
Fz Novelties	$8.8B	+6.0%	$0.3B	+23.0%	$2.7B	+10.4%	$2.6B	+6.3%	$3.0B	+1.9%	$0.4B	-3.4%
Ice Cream/Sherbet	$8.5B	+1.8%	$0.3B	+15.0%	$2.1B	+2.2%	$2.5B	+4.1%	$3.1B	+0.4%	$0.4B	-8.4%
Cream/Creamers	$7.4B	+3.1%	$0.2B	+38.8%	$2.1B	+5.1%	$2.3B	+3.4%	$2.5B	-0.2%	$0.2B	-4.6%
Butter/Butter Blend	$6.1B	-0.1%	$0.2B	+20.0%	$1.7B	+2.3%	$1.7B	-0.4%	$2.3B	-1.3%	$0.3B	-11.3%

Source: IRI Panel, Total US All Outlet, Latest 52 weeks ending March 22, 2026, NBD DoI Applied

Top Brands by Dollar Index across Generations & Dollar Sales ($M)

Brands leading the dollar index across generations include Velveeta for Gen Z, Yoplait Go Gurt for Millennials, Dannon Oikos Pro for Gen X, Kozy Shack for Boomers and Seniors.

Gen Z — $3,699.2 — 79

Velveeta	$37.2	128
Yoplait Original	$33.6	127
Dannon Oikos Triple Zero	**$47.4**	**106**
Ben & Jerrys	$39.5	104
Blue Bonnet	$07.5	96
Hood Lactaid	**$54.8**	90
Private Label	**$1,425.1**	87
Blue Diamond Almond Breeze	$19.2	78
International Delight	$33.7	74
Belgioioso	$34.7	74

Millennials — $33,550.2 — 102

Yoplait Go Gurt	$103.1	223
Dannon Danimals Smoothie	$157.7	217
Jonnypops	$98.9	184
Stonyfield Organic	$293.3	184
Oatly	$98.7	159
Frigo Cheese Heads	$204.2	147
Planet Oat	$144.0	144
Chobani Flip	$269.0	137
Organic Valley	$169.7	134
Nestle Coffee Mate Natural Bliss	$93.6	131

Gen X — $31,694.1 — 102

Dannon Oikos Pro	$200.3	146
Halo Top	$88.0	145
Califia Farms	$87.8	127
Siggis	$94.2	123
Borden	$87.3	121
Noosa	$95.8	116
Nestle Starbucks	$133.5	116
Daisy	**$566.7**	**115**
Galbani	$147.9	114
Belgioioso	$324.8	114

Boomers — $33,437.8 — 101

Kozy Shack	$114.6	173
Breakstones	$102.4	150
I Cant Believe Its Not Butter	$100.2	146
Land O Lakes	**$685.1**	**141**
Reddi Wip	$163.9	140
Breyers	$246.7	136
Turkey Hill	$106.0	133
Hood	$124.7	131
Fage Total	$237.8	127
Nestle Drumstick	$227.8	126

Seniors — $3,689.0 — 84

Kozy Shack	$17.8	205
Hood	$24.0	192
Turkey Hill	$19.1	183
Klondike	$12.5	175
I Cant Believe Its Not Butter	$15.6	173
Friendlys	$11.6	162
Blue Bell	**$51.8**	**142**
Breyers	$34.0	142
Nestle Drumstick	$32.3	135
Breakstones	$12.2	134

Circana.

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