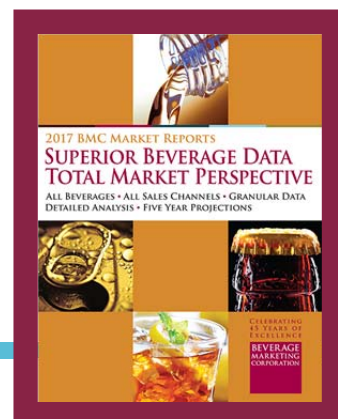


U.S. DAIRY ALTERNATIVE BEVERAGES TOPLINE

2017 EDITION (Published August 2017. Data through 2016. Market projections through 2021.) More than 20 pages, with text analysis, graphs and charts.



This topline report from Beverage Marketing Corporation provides a brief overview of the category with key data and five year forecasts. Perfect for investors, entrepreneurs requiring statistics for their business plan, ad agencies preparing an account pitch or anyone who needs a quick view of the dairy alternatives sector.

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INSIDE:

REPORT OVERVIEW

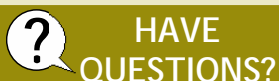
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THE ANSWERS YOU NEED

U.S. Dairy Alternative Beverages Topline offers a concise summary of the overall market. Questions answered include:

- How much volume, including beverages made from soy, almonds, rice, flax and other plants, is consumed per capita in the United States, how has this changed in recent years, and what trends are behind these developments?
- How did the various dairy alternative beverage market segments perform in 2016, and how are they likely to develop in the future?
- Which flavors are growing the fastest?
- Which segment of the market is expected to perform best by 2021?

THIS REPORT FEATURES

U.S. Dairy Alternative Beverages Topline contains key information and identifies important trends concerning the U.S. market for non-dairy alternatives to fluid milk. It features category volume, wholesale dollar sales, per capita consumption, leading brand market shares and five-year projections.

U.S. Dairy Alternative Beverages Topline

August 2017



RESEARCH • DATA • CONSULTING

NOTE: The information contained in this report is confidential and solely intended for the benefit of the immediate recipient hereof.

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U.S. DAIRY ALTERNATIVE BEVERAGE MARKET
SHARE OF WHOLESALE DOLLAR SALES BY FLAVOR (r)
2011 – 2021(P)

| Flavor | 2011 | 2012 | 2013 | 2014 | 2015 | 2016 | 2021(P) |
|---------------|--------------|--------------|--------------|--------------|--------------|--------------|----------------|
| Vanilla | 15.5% | 15.5% | 15.5% | 15.5% | 15.5% | 15.5% | 15.5% |
| Plain | 15.5% | 15.5% | 15.5% | 15.5% | 15.5% | 15.5% | 15.5% |
| Chocolate | 15.5% | 15.5% | 15.5% | 15.5% | 15.5% | 15.5% | 15.5% |
| Coffee | 15.5% | 15.5% | 15.5% | 15.5% | 15.5% | 15.5% | 15.5% |
| Other | 15.5% | 15.5% | 15.5% | 15.5% | 15.5% | 15.5% | 15.5% |
| TOTAL | 15.5% | 15.5% | 15.5% | 15.5% | 15.5% | 15.5% | 15.5% |

(r) Revised

(P) Projected

Source: Beverage Marketing Corporation

A variety of factors should contribute to the continued, if not particularly dramatic, enlargement of the U.S. dairy alternative beverage market.

- Beyond the simple growth of the overall U.S. population, the faster growth of certain segments — namely, Hispanic, African-American and Asian — associated with higher levels of lactose intolerance could contribute to increased demand for non-dairy alternatives to fluid milk.
- The ever-expanding array of dairy alternative beverage types — from those made with already familiar nuts like almonds and cashews to those derived from less familiar herbs and seeds like flax and hemp — provide more options for consumers who may have an aversion to one plant or another as well as to milk itself.
- In addition to new types, there's the ongoing influx of new flavors and formulations, which could appeal to growing numbers of consumers, regardless of whether or not they dislike or cannot stomach actual milk. While soymilk may have initially resonated with consumers for whom taste was not the primary concern, beverages that actually do taste good, while also checking off other boxes on the list of requirements (dairy-free, gluten-free, genetically modified organism-free, etc.), inherently have the chance to grow more popular.
- The leading dairy alternative beverage companies — WhiteWave and Blue Diamond — have long track records as successful enterprises with resources to promote their wares (which in both instances include products besides beverages). Nonetheless, room remains for bigger food and beverage companies to enter the game should they so choose. While companies like Coca-Cola and PepsiCo have dabbled in dairy alternatives such as soymilk or soy/fruit blends, a fuller commitment by such industry powerhouses could make a huge difference in the category's future.
- Indeed, another food and beverage industry giant became deeply involved in the dairy alternative beverage market when Danone purchased WhiteWave in mid-2016. And Campbell Soup Company bought Pacific Foods in 2017.
- Besides coffee shops, where certain people have long preferred non-dairy options to milk, dairy alternatives have yet to penetrate off-premise channels to any significant extent. If they were able to become staples in venues beyond Dunkin' Donuts and Starbucks, then they would move along new avenues of growth. While the opportunities in restaurants and aboard airplanes may not be enormous, they are big enough to be significant for a relatively small category like dairy alternatives.