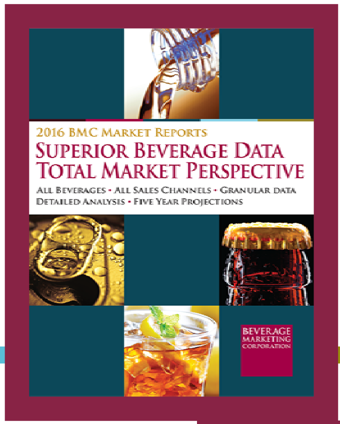
# U.S. Milk and Dairy Beverages through 2020

2016 Edition (Published December 2016. Data through 2015. Market projections through 2020.) More than 225 pages, with extensive text analysis, graphs, charts and tables.




This U.S. milk industry research report from Beverage Marketing Corporation includes data on fluid milk production, consumption, flavors, milk by fat content and advertising expenditures. It also analyzes the forces reshaping the dairy industry, such as consolidation, pricing and health matters and addresses packaging and distribution. To round out its findings, this comprehensive industry report also covers flavored dairy-based shelf stable beverages, yogurt drinks and creamers.

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## Inside:



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## The answers you need

In addition to reliable historical and current data, this report provides five year forecasts on a broad range of market aspects giving readers a strong tool for spotting trends and opportunities.

This market research report examines industry developments and issues of interest to processors, marketers, advertising executives, industry suppliers, financial analysts and anyone else with a special interest in the U.S. milk and dairy beverage marketplace.

- How much was consumed in the United States during 2015, and how much was likely to be imbibed in 2016?
- How did the leading processors perform?
- What is the U.S. dairy industry doing to spur consumption?
- Which region produces the most milk? Which consumes the most?
- What are the most recent developments in packaging?
- How are the dairy-based shelf-stable and yogurt based beverage segments faring?
- What are the growth prospects for milk and its segments through 2020?

## This report features

Backed by Beverage Marketing's reliable, all-sales-channel-inclusive data, readers get a comprehensive understanding of all facets of the market including:

- Analysis of the national and regional markets.
- Market volume segmentation by fat level and flavors.
- Coverage of the different types, including flavored milk, organic milk and shelf-stable dairy-based beverages.
- Analysis of distribution channels, quantifying volume sold through various on- and off-premise distribution channels.
- A look at wholesale and retail sales as well as pricing by retail outlet type.
- Exploration of recent developments in packaging as well as a break-down of the fluid milk market by package size and a break-out of volume by package material type (plastic, paperboard and glass).
- Discussion of the major dairy processors and fluid milk companies, including mergers and acquisitions, brands and private label and strategies that companies and industry organizations have used to market and distribute.
- Wholesale dollar sales for leading dairy processors including Dean Foods, Kroger Dairy Division, Dairy Farmers of America, Borden Dairy Company and more.
- A look at the branded vs. private label markets and the market shares held by each historically and currently in the United States.

- Coverage of dairy-based shelf-stable beverages including Frappuccino, Hershey's, Yoo-hoo and others.
- Data on advertising expenditures.
- Demographic profiles of milk users and how they stand in relation to the total adult population of the United States.
- A look at the drinkable yogurt market, non-dairy creamer with statistics and discussion covering particular brands including Dannon, Stonyfield, Coffee-Mate, International Delight.
- Discussion of the organic market.
- Beverage Marketing's projections for the market and its segments (whole fat, fat reduced, fat-free, flavored and buttermilk) over the next five years through 2020.

# U.S. Milk and Dairy Beverages through 2020

December 2016

BEVERAGE MARKETING CORPORATION

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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Flavored milk has been one of the few bright spots in the otherwise dismal milk category, which is experiencing several years of decline. Unfortunately for the overall milk industry, the modest growth of flavored milk does not even begin to offset the declines in white milk.

- Milk is an unusual beverage category in that the vast majority of volume is plain, and only a small share is flavored. In most other categories, such as carbonated soft drinks (CSDs) and fruit beverages, different flavors abound. Today's consumer is enamored with options and having new experiences. The beverage industry responds to this product promiscuity by offering myriad choices and an ever-expanding roster of new flavors. Clearly, there seems to be growth potential for flavored milk, but the sales trends have been lackluster to date.
- Flavored milk seems much more competitive than white milk when it comes to taking on popular refreshment beverages, such as CSDs, energy drinks and fruit drinks. It has opened up opportunities for milk's expansion into single-serve and immediate consumption.
- Compared to white milk, flavored milk products are generally higher priced and higher margin, so they are attractive for a dairy processor's margins.
- While the taste of white milk seems polarizing – many consumers love the taste while many dislike it – flavored milk seems to be well loved – especially chocolate – and the very nature of flavors should make available tastes for every consumer.
- In general, however, flavored milk is almost all chocolate, and innovations beyond chocolate have been limited, with most of those that have come to market remaining small or failing altogether. There are a few milk processors and brands that have the vision of a milk case full of flavors, but inroads have been mostly local and relatively small.

**Exhibit 2.12**

## U.S. FLUID MILK MARKET

### CHANGE IN VOLUME BY MILK FAT TYPE

### 1980 – 2020(P)

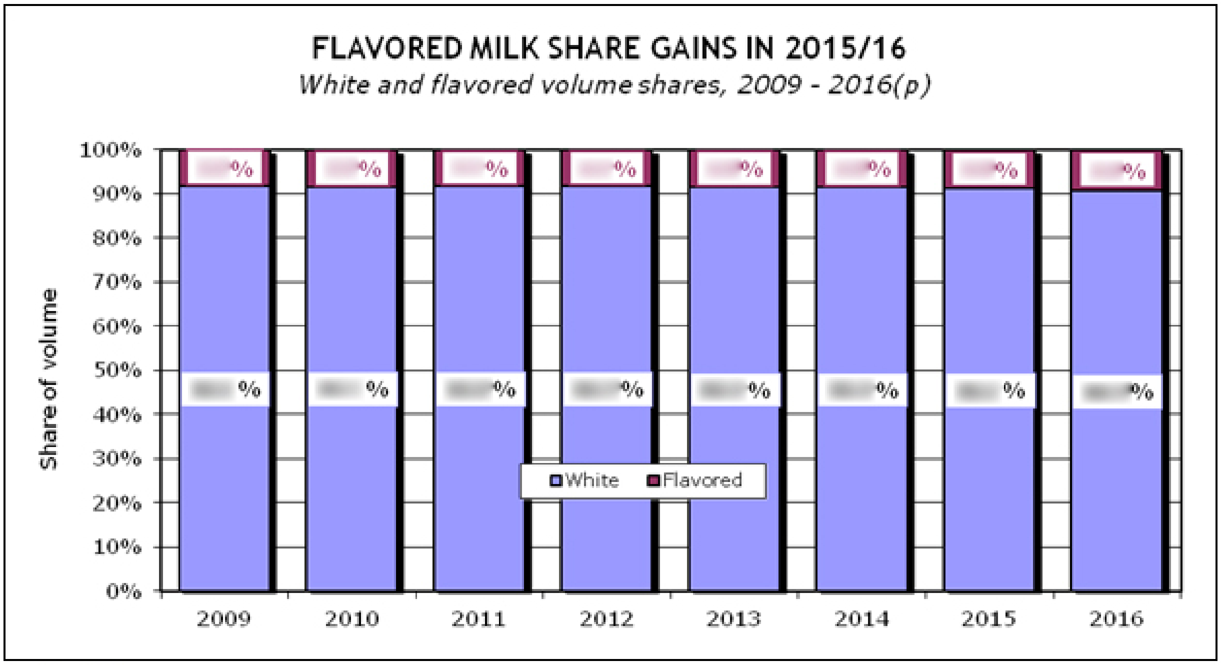
| Year | Plain Whole | White Fat-Reduced* | White Fat-Free | Flavored | Butter | TOTAL |
|---|---|---|---|---|---|---|
| 1975/80** | [illegible]% | [illegible]% | [illegible]% | [illegible]% | [illegible]% | [illegible]% |
| 1980/85** | [illegible]% | [illegible]% | [illegible]% | [illegible]% | [illegible]% | [illegible]% |
| 1985/86 | [illegible]% | [illegible]% | [illegible]% | [illegible]% | [illegible]% | [illegible]% |
| 1986/87 | [illegible]% | [illegible]% | [illegible]% | [illegible]% | [illegible]% | [illegible]% |
| 1987/88 | [illegible]% | [illegible]% | [illegible]% | [illegible]% | [illegible]% | [illegible]% |
| 1988/89 | [illegible]% | [illegible]% | [illegible]% | [illegible]% | [illegible]% | [illegible]% |
| 1989/90 | [illegible]% | [illegible]% | [illegible]% | [illegible]% | [illegible]% | [illegible]% |
| 1990/91 | [illegible]% | [illegible]% | [illegible]% | [illegible]% | [illegible]% | [illegible]% |
| 1991/92 | [illegible]% | [illegible]% | [illegible]% | [illegible]% | [illegible]% | [illegible]% |
| 1992/93 | [illegible]% | [illegible]% | [illegible]% | [illegible]% | [illegible]% | [illegible]% |
| 1993/94 | [illegible]% | [illegible]% | [illegible]% | [illegible]% | [illegible]% | [illegible]% |
| 1994/95 | [illegible]% | [illegible]% | [illegible]% | [illegible]% | [illegible]% | [illegible]% |
| 1995/96 | [illegible]% | [illegible]% | [illegible]% | [illegible]% | [illegible]% | [illegible]% |
| 1996/97 | [illegible]% | [illegible]% | [illegible]% | [illegible]% | [illegible]% | [illegible]% |
| 1997/98 | [illegible]% | [illegible]% | [illegible]% | [illegible]% | [illegible]% | [illegible]% |
| 1998/99 | [illegible]% | [illegible]% | [illegible]% | [illegible]% | [illegible]% | [illegible]% |
| 1999/00 | [illegible]% | [illegible]% | [illegible]% | [illegible]% | [illegible]% | [illegible]% |
| 2000/01 | [illegible]% | [illegible]% | [illegible]% | [illegible]% | [illegible]% | [illegible]% |
| 2001/02 | [illegible]% | [illegible]% | [illegible]% | [illegible]% | [illegible]% | [illegible]% |
| 2002/03 | [illegible]% | [illegible]% | [illegible]% | [illegible]% | [illegible]% | [illegible]% |
| 2003/04 | [illegible]% | [illegible]% | [illegible]% | [illegible]% | [illegible]% | [illegible]% |
| 2004/05 | [illegible]% | [illegible]% | [illegible]% | [illegible]% | [illegible]% | [illegible]% |
| 2005/06 | [illegible]% | [illegible]% | [illegible]% | [illegible]% | [illegible]% | [illegible]% |
| 2006/07 | [illegible]% | [illegible]% | [illegible]% | [illegible]% | [illegible]% | [illegible]% |
| 2007/08 | [illegible]% | [illegible]% | [illegible]% | [illegible]% | [illegible]% | [illegible]% |
| 2008/09 | [illegible]% | [illegible]% | [illegible]% | [illegible]% | [illegible]% | [illegible]% |
| 2009/10 | [illegible]% | [illegible]% | [illegible]% | [illegible]% | [illegible]% | [illegible]% |
| 2010/11 | [illegible]% | [illegible]% | [illegible]% | [illegible]% | [illegible]% | [illegible]% |
| 2011/12 | [illegible]% | [illegible]% | [illegible]% | [illegible]% | [illegible]% | [illegible]% |
| 2012/13 | [illegible]% | [illegible]% | [illegible]% | [illegible]% | [illegible]% | [illegible]% |
| 2013/14 | [illegible]% | [illegible]% | [illegible]% | [illegible]% | [illegible]% | [illegible]% |
| 2014/15 | [illegible]% | [illegible]% | [illegible]% | [illegible]% | [illegible]% | [illegible]% |
| 2015/16(p) | [illegible]% | [illegible]% | [illegible]% | [illegible]% | [illegible]% | [illegible]% |
| 2016/17(P) | [illegible]% | [illegible]% | [illegible]% | [illegible]% | [illegible]% | [illegible]% |
| 2017/18(P) | [illegible]% | [illegible]% | [illegible]% | [illegible]% | [illegible]% | [illegible]% |
| 2018/19(P) | [illegible]% | [illegible]% | [illegible]% | [illegible]% | [illegible]% | [illegible]% |
| 2019/20(P) | [illegible]% | [illegible]% | [illegible]% | [illegible]% | [illegible]% | [illegible]% |

*(p) Preliminary; (P) Projected*

** Includes 1% and 2% milk.*

*** Five-year compound annual growth rate.*

*Source: Beverage Marketing Corporation*




*(p) Preliminary*
*Source: Beverage Marketing Corporation*