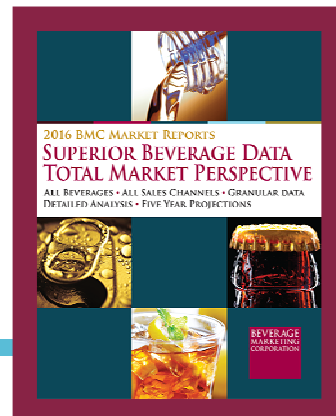


U.S. MILK TOPLINE

2016 EDITION (Published December 2016. Data through 2015. Market projections through 2020.) Nearly 40 pages, with graphs, charts and tables.



This U.S. milk industry research report includes data on fluid milk production, consumption, flavors, distribution and packaging. To round out its market research findings, this concise industry report also projects the market five years into the future.

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**HAVE
QUESTIONS?**

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THE ANSWERS YOU NEED

- How much fluid milk was consumed in the United States during 2015?
- Which region produces the most milk? Which consumes the most?
- Which distribution channels carry the most milk, and which are gaining share?
- What is the breakdown of branded versus private label?
- What are the preferred package types and sizes?
- What are the growth prospects for milk and its segments through 2020?

THIS REPORT FEATURES

This market research report includes a brief overview of the milk category with key data and five-year forecasts. It is perfect for processors, marketers, advertising executives, industry suppliers, financial analysts and anyone else with a special interest in the U.S. milk and dairy beverage marketplace. This industry report contains:

- Data on the national and regional market trends.
- Industry volume segmentation by fat level and flavors.
- Statistics on the fluid milk market by package size and package material type (plastic, paperboard, glass).
- A look at the branded vs. private label markets and the U.S. market share held by each brand historically and currently.
- Beverage Marketing's projections for the market and its segments (whole fat, fat reduced, fat-free, flavored and buttermilk) through 2020.

U.S. Milk Topline

December 2016



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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Consumers are moving away from milk in favor of other options. There are a number of factors contributing to milk's decline over the last few years, including economic weakness, with sustained underemployment and less disposable income to be spent on food.

- Other external forces include the slowing of new household formation and fewer babies being born. There also continues to be increasing innovation in beverages and foods that milk competes with, including increasingly popular almond and coconut milk, in part related to a growing incidence of vegan and dairy-free diets.
- Many of those factors weighed less heavily on the average consumer in 2015 and into 2016. Milk prices declined, as did gas prices, and the economy and employment picture were more positive. Consumers might have gotten in the habit of consuming less milk, and reversal of the factors that drove milk decline in the last five years are not necessarily driving increased demand now.
- Consumer attitudes about milk have become less positive over time, with growing concern, whether warranted or not, about hormones, antibiotics, genetically modified organisms (GMOs), sustainability and animal welfare. Increasing skepticism, coupled with the growing abundance of alternatives to milk, mean fewer consumers feel that milk is essential for a healthy diet. Mothers, who once believed that in order to grow strong and healthy, their children needed to drink milk, now believe that there are many options that provide the same, or better, nutrition for their kids. In fact, consumers' understanding of the many benefits of milk seems to be slipping – while most mothers still believe that milk is healthy, many are hard pressed to explain why.
- Of course, the price of milk plays a role as well. Initially, when the recession hit the United States hard in 2008, it appeared that the milk market was somewhat recession proof. During that first year of the recession the market was basically flat. Then, in 2009, when milk prices were low, there was some growth.
- In 2009, as milk prices started moving down, consumers saw it as a good value, as well as a household staple. While being a drain on other competitive beverages, the recession might have actually helped the milk category in 2009, as people ate at home more. That year, in fact, milk bucked the trend of most non-alcoholic beverages, several of which suffered slight or significant declines.
- But 2009 was the last year the milk category saw any growth. In 2010, with prices up and consumer demand depressed, volume began its long decline. Milk prices rose even higher in 2011 and 2012. In the meantime, the economy did not improve much.
- In addition, the severe drought in 2012 and supply issues, in part influenced by increasing dairy exports, led to even higher milk prices in 2013 and 2014. Milk prices reached an historic high in 2014. (See Chapter 8 for more on milk pricing.) As prices came down in 2015 and still in 2016, milk companies and retailers expected that the milk category would rebound, but that did not come to pass.

THE SOUTH CONSUMED ONE-THIRD OF U.S. MILK

Share of consumption by region, 2015



Source: Beverage Marketing Corporation

Exhibit 9

U.S. FLUID MILK MARKET SHARE OF PRODUCTION BY REGION 2011 – 2015

Region	2011	2012	2013	2014	2015
South	33%	33%	33%	33%	33%
Midwest	25%	25%	25%	25%	25%
West	20%	20%	20%	20%	20%
Northeast	22%	22%	22%	22%	22%
TOTAL	100%	100%	100%	100%	100%

Source: Beverage Marketing Corporation; USDA