

MILK AND DAIRY BEVERAGES IN THE U.S. THROUGH 2022: EXCEL DATA SET

2018 EDITION (Published December 2018. Data through 2017.
Market projections through 2022.) Comprehensive Excel Data Set.

This U.S. milk industry research report includes data on fluid milk production, consumption, flavors, milk by fat content and advertising expenditures. Pricing, 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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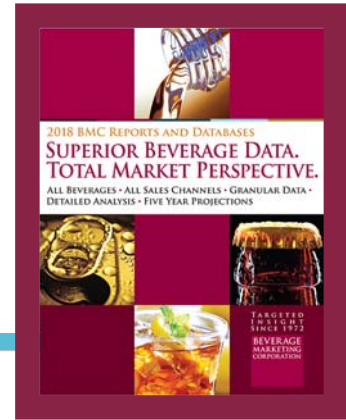


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HAVE
QUESTIONS?

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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 users a strong tool for spotting trends and opportunities.

This market research report examines industry developments 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 2017, and how much was likely to be imbibed in 2018?
- How did the leading processors perform?
- Which region produces the most milk? Which consumes the most?
- How have packaging trends shifted over time? What are expectations by 2022?
- How are the dairy-based shelf-stable and yogurt-based beverage segments faring?
- What are the growth prospects for milk and its segments through 2022?

THIS REPORT FEATURES

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

- Data on the national and regional markets.
- Market volume segmentation by fat level and flavors.
- Coverage of the different types of dairy beverages 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.
- 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).
- 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 covering particular brands including Dannon, Stonyfield, Coffee-Mate and International Delight.
- A look at growth of the organic milk 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 2022.

Milk and Dairy Beverages in the U.S. through 2022: Excel Data Set December 2018



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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Exhibit 1.3

**U.S. FLUID MILK MARKET
COMPOUND ANNUAL GROWTH
1980 – 2022(P)**

Period	Compound Annual Growth Rate
1975 - 1980	■ %
1980 - 1985	■ %
1985 - 1990	■ %
1990 - 1995	■ %
1995 - 2000	■ %
1996 - 2001	■ %
1997 - 2002	■ %
1998 - 2003	■ %
1999 - 2004	■ %
2000 - 2005	■ %
2001 - 2006	■ %
2002 - 2007	■ %
2003 - 2008	■ %
2004 - 2009	■ %
2005 - 2010	■ %
2006 - 2011	■ %
2007 - 2012	■ %
2008 - 2013	■ %
2009 - 2014	■ %
2010 - 2015	■ %
2011 - 2016	■ %
2012 - 2017	■ %
2013 - 2018(P)	■ %
2014 - 2019(P)	■ %
2015 - 2020(P)	■ %
2016 - 2021(P)	■ %
2017 - 2022(P)	■ %

*CAGR: Compound annual growth rate
(P) Projected; 2018 total is based
on year-to-date volume change through July.
Source: Beverage Marketing Corporation;
International Dairy Foods Association*

**U.S. FLUID MILK MARKET
CHANGE IN VOLUME BY MILK FAT TYPE
1981 – 2022(P)**

Year	White Plain Whole	White Fat-Reduced*	White Fat-Free	Flavored	All Other White Milk	TOTAL
1980/81	100%	100%	100%	100%	100%	100%
1981/82	100%	100%	100%	100%	100%	100%
1982/83	100%	100%	100%	100%	100%	100%
1983/84	100%	100%	100%	100%	100%	100%
1984/85	100%	100%	100%	100%	100%	100%
1985/86	100%	100%	100%	100%	100%	100%
1986/87	100%	100%	100%	100%	100%	100%
1987/88	100%	100%	100%	100%	100%	100%
1988/89	100%	100%	100%	100%	100%	100%
1989/90	100%	100%	100%	100%	100%	100%
1990/91	100%	100%	100%	100%	100%	100%
1991/92	100%	100%	100%	100%	100%	100%
1992/93	100%	100%	100%	100%	100%	100%
1993/94	100%	100%	100%	100%	100%	100%
1994/95	100%	100%	100%	100%	100%	100%
1995/96	100%	100%	100%	100%	100%	100%
1996/97	100%	100%	100%	100%	100%	100%
1997/98	100%	100%	100%	100%	100%	100%
1998/99	100%	100%	100%	100%	100%	100%
1999/00	100%	100%	100%	100%	100%	100%
2000/01	100%	100%	100%	100%	100%	100%
2001/02	100%	100%	100%	100%	100%	100%
2002/03	100%	100%	100%	100%	100%	100%
2003/04	100%	100%	100%	100%	100%	100%
2004/05	100%	100%	100%	100%	100%	100%
2005/06	100%	100%	100%	100%	100%	100%
2006/07	100%	100%	100%	100%	100%	100%
2007/08	100%	100%	100%	100%	100%	100%
2008/09	100%	100%	100%	100%	100%	100%
2009/10	100%	100%	100%	100%	100%	100%
2010/11	100%	100%	100%	100%	100%	100%
2011/12	100%	100%	100%	100%	100%	100%
2012/13	100%	100%	100%	100%	100%	100%
2013/14	100%	100%	100%	100%	100%	100%
2014/15	100%	100%	100%	100%	100%	100%
2015/16	100%	100%	100%	100%	100%	100%
2016/17	100%	100%	100%	100%	100%	100%
2017/18(P)	100%	100%	100%	100%	100%	100%
2018/19(P)	100%	100%	100%	100%	100%	100%
2019/20(P)	100%	100%	100%	100%	100%	100%
2020/21(P)	100%	100%	100%	100%	100%	100%
2021/22(P)	100%	100%	100%	100%	100%	100%

(P) Projected

* Includes 1% and 2% milk.

Source: Beverage Marketing Corporation

**U.S. FLAVORED FLUID MILK MARKET
VOLUME BY FLAVOR
2012 – 2022(P)**

Flavor	Millions of Gallons							
	2012	2013	2014	2015	2016	2017	2018(P)	2022(P)
Chocolate								
Strawberry								
Banana								
Vanilla								
Coffee								
Other								
TOTAL								

(P) Projected

Source: Beverage Marketing Corporation