

U.S. MILK TOPLINE

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

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.

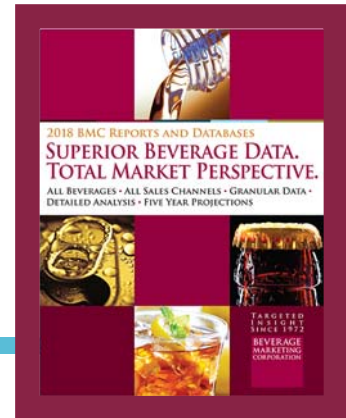
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HAVE
QUESTIONS?

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THE ANSWERS YOU NEED

- How much fluid milk was consumed in the United States during 2017?
- 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 2022?

THIS REPORT FEATURES

This market research report provides a data overview of the milk category with historical market statistics 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 projected market shares for the category and its segments (whole, fat reduced, fat-free, flavored and buttermilk) through 2022.

U.S. Milk Topline

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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**U.S. FLUID MILK MARKET
SHARE OF VOLUME BY MILK FAT TYPE
1980 – 2022(P)**

| Year | White Plain Whole | White Fat-Reduced* | White Fat-Free | Flavored | All Other White Milk | TOTAL |
|-------------|--------------------------|---------------------------|-----------------------|-----------------|-----------------------------|--------------|
| 1980 | 85% | 10% | 3% | 1% | 1% | 100% |
| 1981 | 85% | 10% | 3% | 1% | 1% | 100% |
| 1982 | 85% | 10% | 3% | 1% | 1% | 100% |
| 1983 | 85% | 10% | 3% | 1% | 1% | 100% |
| 1984 | 85% | 10% | 3% | 1% | 1% | 100% |
| 1985 | 85% | 10% | 3% | 1% | 1% | 100% |
| 1986 | 85% | 10% | 3% | 1% | 1% | 100% |
| 1987 | 85% | 10% | 3% | 1% | 1% | 100% |
| 1988 | 85% | 10% | 3% | 1% | 1% | 100% |
| 1989 | 85% | 10% | 3% | 1% | 1% | 100% |
| 1990 | 85% | 10% | 3% | 1% | 1% | 100% |
| 1991 | 85% | 10% | 3% | 1% | 1% | 100% |
| 1992 | 85% | 10% | 3% | 1% | 1% | 100% |
| 1993 | 85% | 10% | 3% | 1% | 1% | 100% |
| 1994 | 85% | 10% | 3% | 1% | 1% | 100% |
| 1995 | 85% | 10% | 3% | 1% | 1% | 100% |
| 1996 | 85% | 10% | 3% | 1% | 1% | 100% |
| 1997 | 85% | 10% | 3% | 1% | 1% | 100% |
| 1998 | 85% | 10% | 3% | 1% | 1% | 100% |
| 1999 | 85% | 10% | 3% | 1% | 1% | 100% |
| 2000 | 85% | 10% | 3% | 1% | 1% | 100% |
| 2001 | 85% | 10% | 3% | 1% | 1% | 100% |
| 2002 | 85% | 10% | 3% | 1% | 1% | 100% |
| 2003 | 85% | 10% | 3% | 1% | 1% | 100% |
| 2004 | 85% | 10% | 3% | 1% | 1% | 100% |
| 2005 | 85% | 10% | 3% | 1% | 1% | 100% |
| 2006 | 85% | 10% | 3% | 1% | 1% | 100% |
| 2007 | 85% | 10% | 3% | 1% | 1% | 100% |
| 2008 | 85% | 10% | 3% | 1% | 1% | 100% |
| 2009 | 85% | 10% | 3% | 1% | 1% | 100% |
| 2010 | 85% | 10% | 3% | 1% | 1% | 100% |
| 2011 | 85% | 10% | 3% | 1% | 1% | 100% |
| 2012 | 85% | 10% | 3% | 1% | 1% | 100% |
| 2013 | 85% | 10% | 3% | 1% | 1% | 100% |
| 2014 | 85% | 10% | 3% | 1% | 1% | 100% |
| 2015 | 85% | 10% | 3% | 1% | 1% | 100% |
| 2016 | 85% | 10% | 3% | 1% | 1% | 100% |
| 2017 | 85% | 10% | 3% | 1% | 1% | 100% |
| 2018(P) | 85% | 10% | 3% | 1% | 1% | 100% |
| 2019(P) | 85% | 10% | 3% | 1% | 1% | 100% |
| 2020(P) | 85% | 10% | 3% | 1% | 1% | 100% |
| 2021(P) | 85% | 10% | 3% | 1% | 1% | 100% |
| 2022(P) | 85% | 10% | 3% | 1% | 1% | 100% |

(P) Projected

* Includes 1% and 2% milk.

Source: Beverage Marketing Corporation

**U.S. FLUID WHITE MILK MARKET
BRANDED VS. PRIVATE LABEL
SHARE OF RETAIL DOLLARS & UNITS*
2012 – 2018(p)**

| Milk Type | Share of Retail Dollars | | | | | | |
|------------------|--------------------------------|-------------|-------------|-------------|-------------|-------------|----------------|
| | 2012 | 2013 | 2014 | 2015 | 2016 | 2017 | 2018(p) |
| Private Label | █████ % | █████ % | █████ % | █████ % | █████ % | █████ % | █████ % |
| Branded | █████ % | █████ % | █████ % | █████ % | █████ % | █████ % | █████ % |
| TOTAL | █████ % | █████ % | █████ % | █████ % | █████ % | █████ % | █████ % |

| Milk Type | Share of Units | | | | | | |
|------------------|-----------------------|-------------|-------------|-------------|-------------|-------------|----------------|
| | 2012 | 2013 | 2014 | 2015 | 2016 | 2017 | 2018(p) |
| Private Label | █████ % | █████ % | █████ % | █████ % | █████ % | █████ % | █████ % |
| Branded | █████ % | █████ % | █████ % | █████ % | █████ % | █████ % | █████ % |
| TOTAL | █████ % | █████ % | █████ % | █████ % | █████ % | █████ % | █████ % |

* Supermarkets only

(p) Preliminary

Source: Beverage Marketing Corporation; SymphonyIRI Group