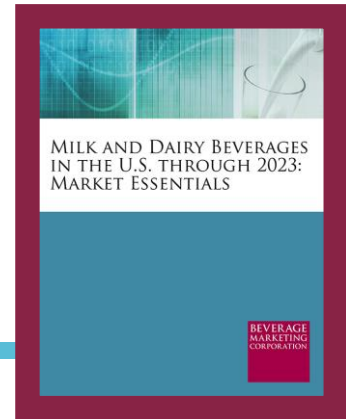


MILK AND DAIRY BEVERAGES IN THE U.S. THROUGH 2023: MARKET ESSENTIALS

2019 EDITION (To be published December 2019. Data through 2018. Market projections through 2023.) Comprehensive Excel Data Set plus an executive summary detailing trends and comprehensive profiles of leading companies, their brands and their strategies.



This U.S. milk industry research report includes data on fluid milk production, consumption, flavors, milk by fat content, advertising expenditures, pricing, packaging and distribution. To round out its findings, the report also covers flavored dairy-based shelf stable beverages, yogurt drinks and creamers.

The report presents the data in Excel spreadsheets, which it supplements with a concise executive summary highlighting key developments as well as a detailed discussion of the leading dairy companies.

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INSIDE:

REPORT OVERVIEW

A brief discussion of this report's key features. **2**

TABLE OF CONTENTS

A detailed outline of this report's contents and data tables. **7**

SAMPLE TEXT AND INFOGRAPHICS

Examples of report text, data content, layout and style. **10**



**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 covers 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 2018, and how much was likely to be imbibed in 2019?
- How did the leading processors perform?
- Which region produces the most milk? Which consumes the most?
- How have package sizes and types shifted over time? What are expectations by 2023?
- How are the dairy-based shelf-stable and yogurt-based beverage segments faring?
- What are the growth prospects for milk and its segments through 2023?

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.
- Quantification of 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 2023.

NOTE: The 2019 edition of this report has not yet been published. **The dates on tables of contents/exhibits and sample data reflect information from last year's edition of this report.**

The 2019 edition you receive will have updated data through 2018 and projections through 2023 where applicable.



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**BEVERAGE
MARKETING
CORPORATION**

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Milk and Dairy Beverages in the U.S. through 2022: Excel Data Set December 2017

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

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Contents

Table of Contents

TABLE OF CONTENTS

Chapter

1. THE U.S. MILK MARKET

- 1.1 U.S. Fluid Milk Market Volume, Weight and Growth 1975 – 2022
- 1.2 U.S. Fluid Milk Market Per Capita Consumption 1975 – 2022
- 1.3 U.S. Fluid Milk Market Compound Annual Growth 1980 – 2022
- 1.4 U.S. Fluid Milk Market Quarterly Volume Shares 2002 – 2017
- 1.5 U.S. Milk Market Production Per Cow 1960 – Q2 2018
- 1.6 U.S. Fluid Milk Market Consumption by Region 2012 – 2022
- 1.7 U.S. Fluid Milk Market Share of Consumption by Region 2012 – 2022
- 1.8 U.S. Fluid Milk Market Change in Consumption by Region 2013 – 2022
- 1.9 U.S. Fluid Milk Market Share of Production by Region 2012 – 2017

2. THE U.S. MILK MARKET BY FAT CONTENT

- 2.10 U.S. Fluid Milk Market Volume by Milk Fat Type 1980 – 2022
- 2.11 U.S. Fluid Milk Market Share of Volume by Milk Fat Type 1980 – 2022
- 2.12 U.S. Fluid Milk Market Change in Volume by Milk Fat Type 1981 – 2022

3. THE U.S. MILK MARKET BY FLAVORS

- 3.13 U.S. White vs. Flavored Milk Market Volume and Share 1996 – 2022
- 3.14 U.S. Flavored Fluid Milk Market Volume by Flavor 2012 – 2022
- 3.15 U.S. Flavored Fluid Milk Market Share of Volume by Flavor 2012 – 2022
- 3.16 U.S. Flavored Fluid Milk Market Change in Volume by Flavor 2013 – 2022

4. LEADING DAIRIES

- 4.17 Leading Dairy Processors Estimated Wholesale Dollar Sales 2012 – 2017
- 4.18 Leading Fluid Milk Companies Estimated Wholesale Dollar Sales 2012 – 2017
- 4.19 Leading Fluid Milk Companies Estimated Share of Sales 2012 – 2017

5. THE LEADING MILK BRANDS AND PRIVATE LABEL

- 5.20 U.S. Fluid White Milk Market Branded vs. Private Label Retail Dollars and Units 2012 – 2018
- 5.21 U.S. Fluid White Milk Market Branded vs. Private Label Share of Retail Dollars and Units 2012 – 2018
- 5.22 U.S. Fluid White Milk Market Branded vs. Private Label Change in Retail Dollars and Units 2013 – 2018
- 5.23 U.S. Flavored Milk Market Branded vs. Private Label Retail Dollars and Units 2012 – 2018
- 5.24 U.S. Flavored Milk Market Branded vs. Private Label Share of Retail Dollars and Units 2012 – 2018
- 5.25 U.S. Flavored Milk Market Branded vs. Private Label Change in Retail Dollars and Units 2013 – 2018

TABLE OF CONTENTS

Chapter

- 6. THE U.S. MILK MARKET BY DISTRIBUTION CHANNEL**
 - 6.26 U.S. Fluid Milk Market Volume by Distribution Channel 2012 – 2022
 - 6.27 U.S. Fluid Milk Market Share of Volume by Distribution Channel 2012 – 2022
 - 6.28 U.S. Fluid Milk Market Change in Volume by Distribution Channel 2013 – 2022

- 7. THE U.S. MILK MARKET BY PACKAGE TYPE AND SIZE**
 - 7.29 U.S. Fluid Milk Market Volume by Package Type and Size 2012 – 2022
 - 7.30 U.S. Fluid Milk Market Share of Volume by Package Type and Size 2012 – 2022
 - 7.31 U.S. Fluid Milk Market Change in Volume by Package Type and Size 2013 – 2021

- 8. U.S. MILK PRICING**
 - 8.32 U.S. Fluid Milk Market Estimated Wholesale and Retail Sales 1980 – 2022
 - 8.33 U.S. White Milk Market Average Price Per Gallon Container by Retail Outlet 2012 – 2018 YTD
 - 8.34 U.S. Fluid Milk Market Federal Order Minimum Prices 1980 – 2018 YTD

- 9. U.S. MILK ADVERTISING EXPENDITURES**
 - 9.35 U.S. Fluid Milk Market Expenditures by Leading Advertisers 2012 – 2017
 - 9.36 U.S. Fluid Milk Market Share of Expenditures by Leading Advertisers 2012 – 2017
 - 9.37 U.S. Fluid Milk Market Change in Expenditures by Leading Advertisers 2013 – 2017
 - 9.38 U.S. Fluid Milk Market Advertising Expenditures by Media 2012 – 2017
 - 9.39 U.S. Fluid Milk Market Share of Advertising Expenditures by Media 2012 – 2017
 - 9.40 U.S. Fluid Milk Market Change in Advertising Expenditures by Media 2013 – 2017

- 10. DEMOGRAPHICS OF THE U.S. MILK CONSUMER**
 - 10.41 U.S. Milk Consumption by Age Penetration by Usage 2017
 - 10.42 U.S. Milk Consumption by Age Share of Volume 2017
 - 10.43 U.S. Milk Consumption by Age Ounces Consumed 2017
 - 10.44 U.S. Milk Consumption by Gender Penetration and Ounces Consumed 2017
 - 10.45 Type of Milk Consumed by Age by Flavor 2017
 - 10.46 Type of Milk Consumed by Age by Fat Level 2017
 - 10.47 How Milk is Consumed by Usage Type 2017

- 11. The U.S. DAIRY-BASED SHELF-STABLE BEVERAGES**
 - 11.48 U.S. Dairy-Based Shelf-Stable Beverages Estimated Wholesale Dollars 2012 – 2017
 - 11.49 U.S. Dairy-Based Shelf-Stable Beverages Share of Wholesale Dollars 2012 – 2017
 - 11.50 U.S. Dairy-Based Shelf-Stable Beverages Change in Wholesale Dollars 2013 – 2017

- 12. THE U.S. YOGURT DRINK MARKET**
 - 12.51 U.S. Yogurt Drink Market Estimated Volume and Growth 2007 – 2022
 - 12.52 U.S. Yogurt Drink Market Estimated Retail Dollars and Growth 2007 – 2022
 - 12.53 U.S. Yogurt Drink Market Share of Estimated Volume by Brand 2012 – 2017

TABLE OF CONTENTS

Chapter

13. THE U.S. NON-DAIRY CREAMER MARKET

- 13.54 U.S. Non-Dairy Creamer Market Estimated Volume and Growth 2007 – 2022
- 13.55 U.S. Non-Dairy Creamer Market Estimated Retail Dollars and Growth 2007 – 2022
- 13.56 U.S. Non-Dairy Creamer Market Share of Estimated Volume by Brand 2012 – 2017

14. THE U.S. ORGANIC MILK MARKET

- 14.57 U.S. Organic Fluid Milk Market Estimated Volume and Growth 2002 – 2022
- 14.58 U.S. Organic Fluid Milk Market Per Capita Consumption 2002 – 2022

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