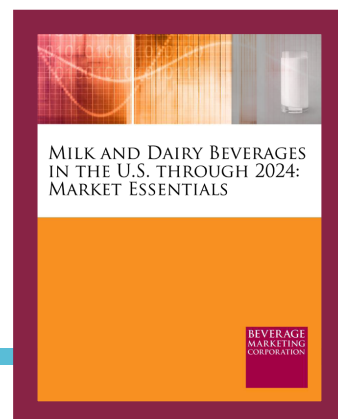


MILK AND DAIRY BEVERAGES IN THE U.S. THROUGH 2024: MARKET ESSENTIALS

2020 EDITION (Published November 2020. Data through 2019. Market projections through 2024.) 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 including the impact of the coronavirus pandemic as well as a detailed discussion of the leading dairy companies.

FOR A FULL
CATALOG OF
REPORTS AND
DATABASES,
GO TO
bmcreports.com

AVAILABLE FORMAT & PRICING



Direct Download
Excel sheets, PDF & Word

\$3,995

*To learn more, to place an advance order or to inquire about additional user licenses **call**: Charlene Harvey +1 212.688.7640 ext. 1962 charvey@beveragemarketing.com*

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. **11**



**HAVE
QUESTIONS?**

Contact Charlene Harvey: 212-688-7640 x 1962
charvey@beveragemarketing.com

**BEVERAGE
MARKETING
CORPORATION**

BEVERAGE MARKETING CORPORATION
850 Third Avenue, 13th Floor, New York, NY 10022
Tel: 212-688-7640 Fax: 212-826-1255

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 2019, and how much was likely to be imbibed in 2020?
- 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 2024?
- How are the dairy-based shelf-stable and yogurt-based beverage segments faring?
- What are the growth prospects for milk and its segments through 2024?

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 (now defunct) 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 2024.



MILK AND DAIRY BEVERAGES IN THE U.S. THROUGH 2024: MARKET ESSENTIALS

BEVERAGE
MARKETING
CORPORATION

Milk and Dairy Beverages in the U.S. through 2024: Market Essentials

November 2020

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.

Copyright © 2020 Beverage Marketing Corporation of New York, 850 Third Avenue, New York, New York 10022, (212) 688-7640. All rights reserved. Reproductions in any form prohibited by law.

Contents

Table of Contents

TABLE OF CONTENTS

TABLE OF CONTENTS	i
-------------------------	---

Summary

The U.S. Milk Market

The National Fluid Milk Market	1
• Overview	1
• Special Note on Coronavirus	10
• Per Capita Consumption	11
• Compound Annual Growth	12
• Seasons	13
• Milk Production	14
The Regional Fluid Milk Markets	16
• Consumption	16
• Production	17
The National Dairy-Based Beverage Market	18
• Overview	18

Profile

Leading Dairies

The Top Dairy Companies	1
• Overview	1
• Nestlé USA	2
• Dean Foods	3
• Kraft Heinz	6
• Schreiber Foods Inc.	7
• Dairy Farmers of America	8
Leading Fluid Milk Processors	10
• Overview	10
• Dean Foods	12
• Kroger Dairy Division	16
• Dairy Farmers of America	18
• Borden Dairy Company	20
• H.P. Hood	21

TABLE OF CONTENTS

Exhibit

1. THE U.S. MILK MARKET

- 1.1 U.S. Fluid Milk Market Volume, Weight and Growth 1975 – 2024
- 1.2 U.S. Fluid Milk Market Per Capita Consumption 1975 – 2024
- 1.3 U.S. Fluid Milk Market Compound Annual Growth 1980 – 2024
- 1.4 U.S. Fluid Milk Market Quarterly Volume Shares 2002 – 2019
- 1.5 U.S. Milk Market Production Per Cow 1960 – Q3 2020
- 1.6 U.S. Fluid Milk Market Volume and Growth by Quarter 2019 – 2020
- 1.7 U.S. Fluid Milk Market Consumption by Region 2014 – 2024
- 1.8 U.S. Fluid Milk Market Share of Consumption by Region 2014 – 2024
- 1.9 U.S. Fluid Milk Market Change in Consumption by Region 2015 – 2024
- 1.10 U.S. Fluid Milk Market Share of Production by Region 2014 – 2019

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

- 2.11 U.S. Fluid Milk Market Volume by Milk Fat Type 1960 – 2024
- 2.12 U.S. Fluid Milk Market Share of Volume by Milk Fat Type 1960 – 2024
- 2.13 U.S. Fluid Milk Market Change in Volume by Milk Fat Type 1965 – 2024

3. THE U.S. MILK MARKET BY FLAVORS

- 3.14 U.S. White vs. Flavored Milk Market Volume and Share 1996 – 2024
- 3.15 U.S. Flavored Fluid Milk Market Volume by Flavor 2014 – 2024
- 3.16 U.S. Flavored Fluid Milk Market Share of Volume by Flavor 2014 – 2024
- 3.17 U.S. Flavored Fluid Milk Market Change in Volume by Flavor 2015 – 2024

4. LEADING DAIRIES

- 4.18 Leading Dairy Processors Estimated Wholesale Dollar Sales 2014 – 2019
- 4.19 Leading Fluid Milk Companies Estimated Wholesale Dollar Sales 2014 – 2019
- 4.20 Leading Fluid Milk Companies Estimated Share of Sales 2014 – 2019

5. THE LEADING MILK BRANDS AND PRIVATE LABEL

- 5.21 U.S. Fluid White Milk Market Branded vs. Private Label Retail Dollars and Units 2014 – 2020
- 5.22 U.S. Fluid White Milk Market Branded vs. Private Label Share of Retail Dollars and Units 2014 – 2020
- 5.23 U.S. Fluid White Milk Market Branded vs. Private Label Change in Retail Dollars and Units 2015 – 2020
- 5.24 U.S. Flavored Milk Market Branded vs. Private Label Retail Dollars and Units 2014 – 2020
- 5.25 U.S. Flavored Milk Market Branded vs. Private Label Share of Retail Dollars and Units 2014 – 2020
- 5.26 U.S. Flavored Milk Market Branded vs. Private Label Change in Retail Dollars and Units 2015 – 2020

TABLE OF CONTENTS

Exhibit

6. THE U.S. MILK MARKET BY DISTRIBUTION CHANNEL

- 6.27 U.S. Fluid Milk Market Volume by Distribution Channel 2014 – 2024
- 6.28 U.S. Fluid Milk Market Share of Volume by Distribution Channel 2014 – 2024
- 6.29 U.S. Fluid Milk Market Change in Volume by Distribution Channel 2015 – 2024

7. THE U.S. MILK MARKET BY PACKAGE TYPE AND SIZE

- 7.30 U.S. Fluid Milk Market Volume by Package Type and Size 2014 – 2024
- 7.31 U.S. Fluid Milk Market Share of Volume by Package Type and Size 2014 – 2024
- 7.32 U.S. Fluid Milk Market Change in Volume by Package Type and Size 2015 – 2024

8. U.S. MILK PRICING

- 8.33 U.S. Fluid Milk Market Estimated Wholesale and Retail Sales 1980 – 2024
- 8.34 U.S. White Milk Market Average Price Per Gallon Container by Retail Outlet
2014 – 2020 YTD
- 8.35 U.S. Fluid Milk Market Federal Order Minimum Prices 1980 – 2020 YTD

9. U.S. MILK ADVERTISING EXPENDITURES

- 9.36 U.S. Fluid Milk Market Expenditures by Leading Advertisers 2014 – 2019
- 9.37 U.S. Fluid Milk Market Share of Expenditures by Leading Advertisers 2014 – 2019
- 9.38 U.S. Fluid Milk Market Change in Expenditures by Leading Advertisers 2015 – 2019
- 9.39 U.S. Fluid Milk Market Advertising Expenditures by Media 2014 – 2019
- 9.40 U.S. Fluid Milk Market Share of Advertising Expenditures by Media 2014 – 2019
- 9.41 U.S. Fluid Milk Market Change in Advertising Expenditures by Media 2015 – 2019

10. DEMOGRAPHICS OF THE U.S. MILK CONSUMER

- 10.42 U.S. Milk Consumption by Age Penetration by Usage 2019
- 10.43 U.S. Milk Consumption by Age Share of Volume 2019
- 10.44 U.S. Milk Consumption by Age Ounces Consumed 2019
- 10.45 U.S. Milk Consumption by Gender Penetration and Ounces Consumed 2019
- 10.46 Type of Milk Consumed by Age by Flavor 2019
- 10.47 Type of Milk Consumed by Age by Fat Level 2019
- 10.48 How Milk is Consumed by Usage Type 2019

11. THE U.S. DAIRY-BASED SHELF-STABLE BEVERAGES

- 11.49 U.S. Dairy-Based Shelf-Stable Beverages Estimated Wholesale Dollars 2014 – 2019
- 11.50 U.S. Dairy-Based Shelf-Stable Beverages Share of Wholesale Dollars 2014 – 2019
- 11.51 U.S. Dairy-Based Shelf-Stable Beverages Change in Wholesale Dollars 2015 – 2019

12. THE U.S. YOGURT DRINK MARKET

- 12.52 U.S. Yogurt Drink Market Estimated Volume and Growth 2007 – 2024
- 12.53 U.S. Yogurt Drink Market Estimated Retail Dollars and Growth 2007 – 2024
- 12.54 U.S. Yogurt Drink Market Share of Estimated Volume by Brand 2014– 2019

TABLE OF CONTENTS

Exhibit

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

- 13.55 U.S. Non-Dairy Creamer Market Estimated Volume and Growth 2007 – 2024
- 13.56 U.S. Non-Dairy Creamer Market Estimated Retail Dollars and Growth 2007 – 2024
- 13.57 U.S. Non-Dairy Creamer Market Share of Estimated Volume by Brand 2014 – 2019

14. THE U.S. ORGANIC MILK MARKET

- 14.58 U.S. Organic Fluid Milk Market Estimated Volume and Growth 2002 – 2024
- 14.59 U.S. Organic Fluid Milk Market Per Capita Consumption 2002 – 2024

Despite fairly significant consolidation over the last several years, the U.S. dairy industry remains uniquely fragmented, with a significant number of large companies.

- In most beverage categories, there are three or four \$1 billion-plus companies. In carbonated soft drinks (CSDs), for example, there are Coke, Pepsi and Keurig Dr Pepper; in bottled water, Nestlé Waters North America, Pepsi and Coke; in fruit beverages, Coke and Pepsi.
- In the dairy business, there are more than two dozen.
- Of course, most dairy companies go far beyond fluid products. Most companies offer broad lines of dairy products, including cultured products, cheese, yogurt and/or ice cream and most also produce other non-dairy beverages.
- In fact, none of the largest companies focuses exclusively on fluid milk, and many do not sell fluid milk. For example, the dairy divisions of Kraft Heinz, Schreiber and Leprino are almost exclusively cheese makers and Unilever Ice Cream and Good Humor-Breyers are the two largest ice cream companies in the nation.

While some of the leading dairy companies, such as Kraft Heinz, Land O' Lakes and Kroger, are household names, many of the giants are virtually unknown to consumers.

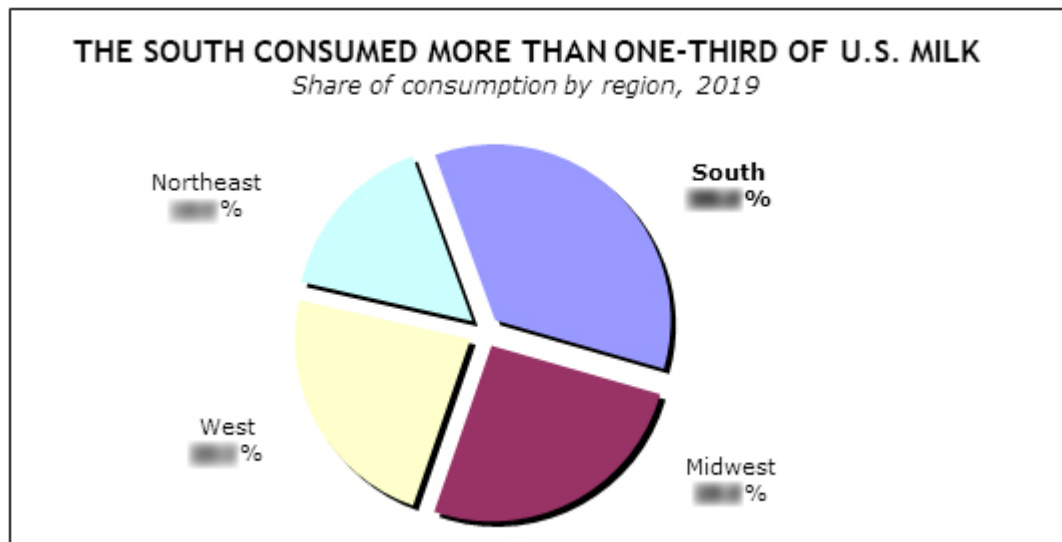
- Cheese companies Schreiber Foods and Leprino Foods Company market almost exclusively to restaurants, foodservice and industry.
- Other companies, such as Dean, Hood and California Dairies, are only passingly recognized by consumers, as their brands are largely regional and may be brand names other than the company name. (Dean declared bankruptcy in 2019 and subsequently sold its assets to other entities, mainly Dairy Farmers of America.)
- Unilever Ice Cream, which owns the Breyers brand, is the largest ice cream company and one of largest dairy companies. Dreyer's Grand Ice Cream, a well-recognized brand by most consumers, is now owned by Nestlé (the largest dairy company).

**U.S. FLAVORED FLUID MILK MARKET
SHARE OF VOLUME BY FLAVOR
2014 – 2024(P)**

Flavor	2014	2015	2016	2017	2018	2019	2020(P)	2024(P)
Chocolate	18%	18%	18%	18%	18%	18%	18%	18%
Strawberry	12%	12%	12%	12%	12%	12%	12%	12%
Vanilla	12%	12%	12%	12%	12%	12%	12%	12%
Coffee	12%	12%	12%	12%	12%	12%	12%	12%
Banana	12%	12%	12%	12%	12%	12%	12%	12%
Other	12%	12%	12%	12%	12%	12%	12%	12%
TOTAL	100%	100%	100%	100%	100%	100%	100%	100%

(P) Projected

Source: Beverage Marketing Corporation



Source: Beverage Marketing Corporation