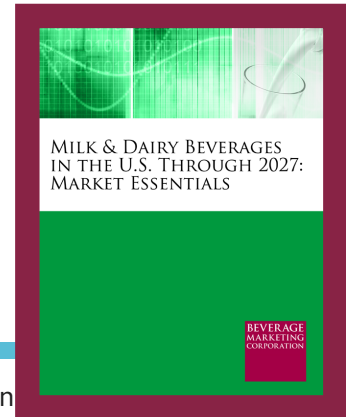


MILK AND DAIRY BEVERAGES IN THE U.S. THROUGH 2027: MARKET ESSENTIALS

2023 EDITION (To be published December 2023. Data through 2022, preliminary 2023 figures and forecasts through 2027.) 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 from Beverage Marketing Corporation looks at past, present and future of the dairy milk market, chronicling its growth and trajectory from its days as a commoditized, unchallenged household staple to a segment that now faces fierce competition from non-dairy challengers seeking to usurp its consumption moments and erode its existing consumer base and the loyalty of the next generation of consumers. This report, of interest to the dairy industry as well as to those who offer similar consumer benefits or vie for similar consumption moments, includes data on dairy fluid milk production, consumption, flavors, milk sales trends by fat content, advertising expenditures, pricing, packaging and distribution and more. To round out its findings, the report also covers other dairy beverages including flavored dairy-based shelf stable beverages, yogurt drinks and creamers. In addition to the standard break-outs of fluid milk, the study also looks at the organic market.

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.

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**HAVE
QUESTIONS?**

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



BEVERAGE MARKETING CORPORATION
P.O. Box 2399 | 143 Canton Road, 2nd Floor
Wintersville, OH 43953
Tel: 212-688-7640 Fax: 740-314-8639

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.

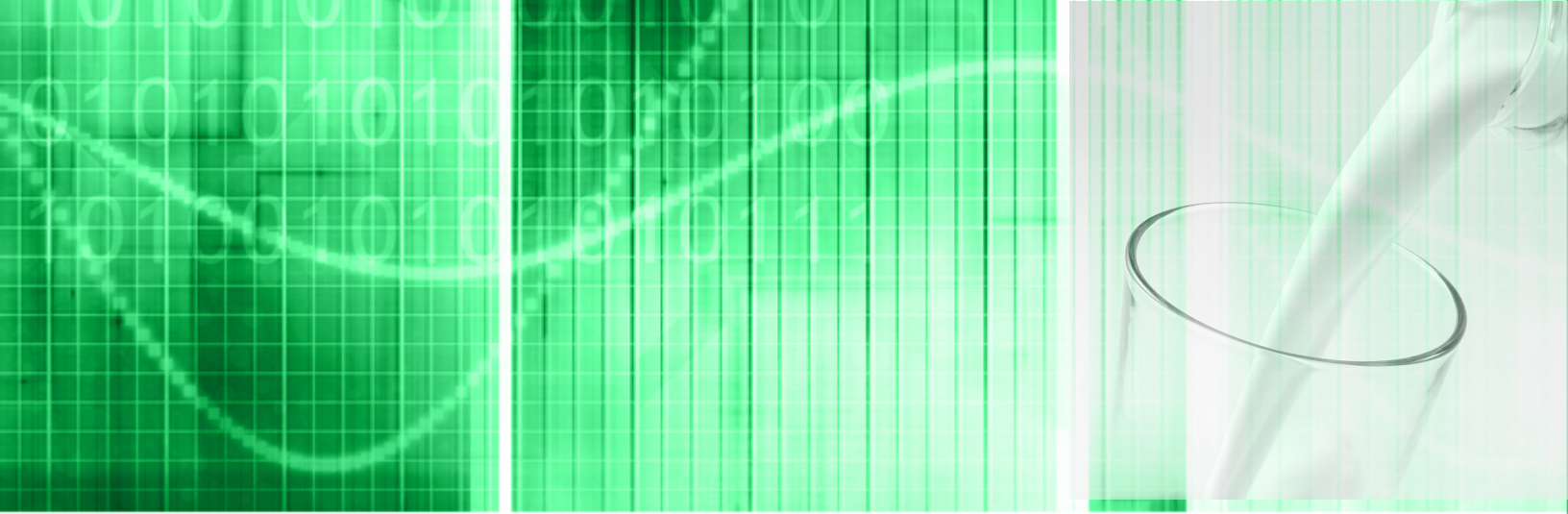
- How much was consumed in the United States during 2022, and how much was likely to be imbibed in 2023?
- How did the leading processors perform?
- Which region produces the most milk? Which consumes the most?
- How have package sizes and types shifted over time? What are expectations by 2027?
- How are the dairy-based shelf-stable and yogurt-based beverage segments faring?
- What are the growth prospects for milk and its segments through 2026?

THIS U.S. MILK 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 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.
- 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 2027.



MILK & DAIRY BEVERAGES IN THE U.S. THROUGH 2027: MARKET ESSENTIALS

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NOTE: The 2023 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 2023 edition you receive will have updated data through 2022, preliminary 2023 figures and projections through 2027 where applicable.

Milk and Dairy Beverages in the U.S. through 2026: Market Essentials

December 2022

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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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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 a handful of \$1 billion-plus companies. In carbonated soft drinks (CSDs), for example, there are Coke, Pepsi and Keurig Dr Pepper; in bottled water, BlueTriton Brands (which took over much of Nestlé Waters North America's business in 2021), Niagara, Coke, Pepsi and Primo.
- In the dairy business, there are many. 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.

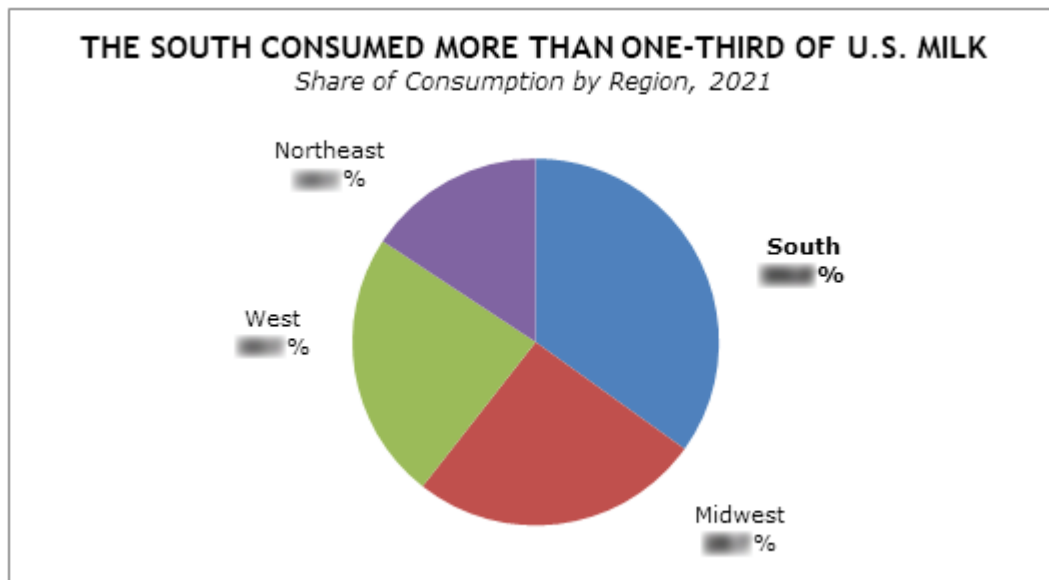
- Cheese companies Schreiber Foods and Leprino Foods Company market almost exclusively to restaurants, foodservice and industry.
- Other companies, such as Dean, Hood and California Dairies, are (or, in the case of Dean, were) only passingly recognized by consumers, as their brands are largely regional 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; it is no longer profiled here.)
- Unilever Ice Cream, owner of 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
2016 – 2026(P)**

| Flavor | 2016 | 2017 | 2018 | 2019 | 2020 | 2021 | 2022(p) | 2026(P) |
|---------------|---------------|---------------|---------------|---------------|---------------|---------------|----------------|----------------|
| Chocolate | 18.5% | 18.5% | 18.5% | 18.5% | 18.5% | 18.5% | 18.5% | 18.5% |
| Strawberry | 12.5% | 12.5% | 12.5% | 12.5% | 12.5% | 12.5% | 12.5% | 12.5% |
| Vanilla | 12.5% | 12.5% | 12.5% | 12.5% | 12.5% | 12.5% | 12.5% | 12.5% |
| Coffee | 12.5% | 12.5% | 12.5% | 12.5% | 12.5% | 12.5% | 12.5% | 12.5% |
| Banana | 12.5% | 12.5% | 12.5% | 12.5% | 12.5% | 12.5% | 12.5% | 12.5% |
| Other | 12.5% | 12.5% | 12.5% | 12.5% | 12.5% | 12.5% | 12.5% | 12.5% |
| TOTAL | 100.0% | 100.0% | 100.0% | 100.0% | 100.0% | 100.0% | 100.0% | 100.0% |

(P) Projected

Source: Beverage Marketing Corporation



Source: Beverage Marketing Corporation