“Milk is most associated with at-home breakfast or as an additive to cereal or coffee, but the growing variety of milk products invites expansion beyond these traditional usage occasions. Milk producers should focus on innovations that offer creative flavors, convenient packaging, and trustworthy sources could help to encourage new milk usage occasions and locations.”

– Jennifer Zegler, Beverage Analyst

In this report we answer the key questions:

- Can milk expand beyond the at-home breakfast and additive occasions?
- How can non-dairy milks make cautious consumers more comfortable?
- Are dairy and non-dairy milk enemies, or can there be collaboration?
- Are consumers willing to turn to milk as a sports drink?

Milk in some form—dairy and/or non-dairy—is purchased by nearly 95% of U.S. households, according to Mintel research. Respondents are most likely to consume milk with breakfast, use it as an ingredient when cooking, and add it to another food or beverage, such as cereal, coffee, or tea. Milk is more versatile than these traditional usage occasions, and milk manufacturers should aim to expand usage to on-the-go occasions by creating flavors, packaging, and varieties that can be used as snacks, treats, or post-workout drinks.

Dairy milk dominates the segment with 90.5% of market share, but consumer interest in non-dairy milk is growing, especially in newer sources such as almond and coconut milk. Indeed, Mintel research finds that half of respondents purchase non-dairy milk in some format. Still, the other milk segment, led by plant-based milk brands, accounts for just 8.9% market share, according to SymphonyIRI Group multi-outlet sales data. Brands in respective portions of the aisle are taking aim at the competition, but the overlap between dairy and non-dairy milk purchase found in Mintel research suggests that consumers are likely to be active in both segments, not one or the other.


DID YOU KNOW?

This report is part of a series of reports, produced to provide you with a more holistic view of this market.
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Figure 2: Total U.S. retail sale of dairy and non-dairy milk, by segment, 2007-17

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- Can milk expand beyond the at-home breakfast and additive occasions?
- How can non-dairy milks make cautious consumers more comfortable?
- Are dairy and non-dairy milk enemies, or can there be collaboration?
- Are consumers willing to turn to milk as a sports drink?

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- Dairy brands emphasize purity to connect with conscientious buyers
  
  - Figure 10: Organic Valley, Print Ad
  
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- Demand for on-the-go breakfast an opportunity for milk products
- Consumers embrace dairy—just not milk—at snack-time
- Shelf-stable milk needs to emphasize its green, long-life advantages

**Trend Applications**

- Trend: The Power of One
- Trend: Factory Fear
- Mintel Futures: East Meets West

**Market Size and Forecast**

**Key points**

- Dairy, non-dairy milk performance reflects agricultural price shifts

**Sales and forecast of market**

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- Figure 13: Total U.S. retail sales and forecast of dairy and non-dairy milk, at inflation-adjusted prices (Base year 2012), 2007-17

**Fan chart forecast**

- Figure 14: Total U.S. sales and fan chart forecast of dairy and non-dairy milk, at current prices, 2007-17

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**Key points**

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- Obesity concerns create challenged environment for whole, flavored milk
- Growth in nonwhite population could continue to evolve dairy sales
- Decline in households with children affects milk market

- Figure 15: Any household purchase (net) of dairy and non-dairy milk, by parents and children, December 2012

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**Key points**

- For their dairy fix, some are happy to eat cheese, yogurt

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Report Price: £2466.89 | $3995.00 | €3133.71

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Regional associations
State associations