

North America Dairy - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts 2017 - 2029

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Report description:

The North America Dairy Market size is estimated at USD 138.87 billion in 2024, and is expected to reach USD 166.12 billion by 2029, growing at a CAGR of 3.65% during the forecast period (2024-2029).

Availability of clean label products is enhancing the growth of retailing unit in North America

- The North American distribution channel witnessed a growth of 2.16% in 2022 compared to 2021. The growth was attributed to the popularity and availability of clean-label products in dairy segments, such as cheese, yogurt, and milk. These clean-label dairy products are free from artificial ingredients, including artificial colors, flavors, and preservatives. These retailers also offer a wide variety of dairy products of various brands. This dairy market is expected to rise by 8.81% in 2025 due to the increasing demand for distribution channels in North America.

- Supermarkets and hypermarkets have larger spaces and shelves to store their products. As a result, under the off-trade retailing modes, supermarkets and hypermarkets dominate the country's overall distribution channel by holding a share of 51.32%. Some of these supermarkets and hypermarkets nationwide are Walmart, Target, Kroger, Amazon, Costco Wholesale Corporation, Albertsons Companies, Ahold Delhaize USA, and Publix Super Markets Inc. These retailers provide dairy products at varied prices (low, medium, and high). The base selling price of sour milk in the United States is USD 2.68 to as high as USD 50.

- In North America, consumers majorly prefer out-of-home consumption. In 2022, around 23.1 million individuals consumed food outside at least once a week. The total number of restaurants in the United States was estimated at 101,811 in 2021. As a result, on-trade retailing modes gained popularity during 2018-2021. In North America's on-trade retailing mode, the milk industry held the largest share of 65.84% compared to other dairy product industries in 2022. During 2025-2028, on-trade consumption is expected to increase by 4.5% due to the rising demand for out-of-home consumption.

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Increasing awareness regarding benefits of dairy consumption is promoting the market growth

- The dairy industry in the North American region witnessed a growth of 2.98% in 2022 compared to 2021. The growth was observed due to the rising consciousness about health, as dairy products offer a significant volume of essential nutrients. One cup of milk offers 3.4 grams of protein, 5 grams of carbohydrates, 0.6 grams of saturated fat, and other nutrients. This has increased people's interest in dairy products as they seek to maintain a healthy diet. Thus, the dairy industry is expected to grow by 3.2% in 2024.
- In the North American region, the United States dominates the dairy industry. In 2022, the United States held a share of 70.08%. In January 2023, 150,174 convenience stores were operating in the United States, a rise of 1.5% from the 2022 store count, which helped consumers to purchase dairy products.
- Canada held a share of 18.85%. Texas has the most convenience stores with 16,018 stores, while California follows with 12,000 stores. Some of the famous stores in the North American region are Walmart, Amazon, Kroger, and Target. These stores offer a wide variety of dairy products in the market.
- Mexico held a share of 51.02% in 2022. In 2020, there are 33 supermarket chains, with 3,227 stores, 2,365 department stores, and 53,793 specialized stores nationwide. Informal establishments, such as mobile street vendors and open public markets, cover 50% of the retail market. Dairy products are also available at varied prices (low, medium, and high). The base selling price of packaged milk is USD 1.72, which goes as high as USD 50.5. The availability of these products at various price ranges promotes buying power among the population.

North America Dairy Market Trends

Growing demand for dairy-infused baked products and butter-based snacks in North America boosting the market

- The per capita consumption of the North American dairy industry observed growth of 1.33% in 2022 compared to 2021. While milk has a fat content of around 3.95%, skim solids are recorded to contain 8.94%. These average percentages of both milk fat and skim solids in farm milk (cows' milk from dairy farms) have increased over the last decade. Consequently, consumers are becoming more aware of the benefits derived from dairy products, such as improved strength, consumption of natural ingredients, and other advantages, leading to a rising demand for dairy products in the North American region.
- Consumers in the North American region also gravitated toward butter-based snack products such as cookies and crunchies. Consequently, there was an increase in the import volume of butter. In 2022, butter prices in the United States rose due to additional imports, aligning them with international price levels. The strong demand for premium butter, coupled with the lifting of import tariffs in early 2021, contributed to this trend. Notably, butter imports increased by 0.4 billion pounds in 2021, and estimates based on a milk-fat basis project imports to reach 6.9 billion pounds by 2023.
- With the growing demand for baked foods, including pizza, Baked Macaroni with Mortadella, and other cheese-based products, the demand for cheese is also increasing in the region. Domestic cheese consumption showed continued growth of 2.7% in 2021. To meet the demand for cheese-based foods, cheese imports increased every month (except for February and December) compared to the same months in 2020, reaching a total of 0.3 billion pounds in 2021, marking a 13.2% increase. Cheese production also saw a 2.8% increase, reaching 13.6 billion pounds in 2021.

North America Dairy Industry Overview

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The North America Dairy Market is fragmented, with the top five companies occupying 18.66%. The major players in this market are Danone SA, Froneri International Limited, Groupe Lactalis, The Kraft Heinz Company and Unilever PLC (sorted alphabetically).

Additional Benefits:

- The market estimate (ME) sheet in Excel format
- 3 months of analyst support

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