



GEORGIA DAIRY CONFERENCE

January 19, 2026

**MAKING
EVERY
DROP
COUNT**

 **your
DAIRY
CHECKOFF**
Dairy Management Inc.

CONSUMER ATTITUDES ARE POSITIVE
DEMAND FOR DAIRY IS STRONG



MAJOR MEDIA OUTLETS HERALD DAIRY'S RENAISSANCE



GLAMOUR
bon appétit

Our Protein Panic Is Making Whole Milk Cool Again

How milk has gone from inflammatory villain to main character in just a few years.

BY ASHLIENE MCMI
May 28, 2025



Opinion Agriculture

How milk got its mojo back

The dairy industry's efforts to woo customers products are a masterclass in corporate survival

BROOKE MASTERS

+ Add to myFT

But in 2024, U.S. consumption of whole milk rose by 3.2 percent — only the second increase since the 1970s — while consumption of plant milk fell 5.9 percent, according to data from Circana, a market research firm. Up 1.9 percent.

FINANCIAL TIMES

"For dairy milk to be growing at these numbers," said John Craw

the HUSTLE
HubSpot Media

Why everybody's drinking milk again

FOOD TECHNOLOGY MAGAZINE | MARKET TRENDS

Dairy Stages a Comeback

Americans consumed a record number of dairy products in 2023, signaling that there's room for both traditional products and innovative offerings within the sector.



BUSINESS INSIDER

DAQ -0.39% S&P 500 -0.44% AAPL -0.63% NVDA -1.23%

FOOD

Dairy is so back. It's now a high-protein, gut-healthy superfood shoppers love.

By Kim Schewitz



THE WEEK

Dairy milk, once maligned, is making a comeback

Sales of dairy milk were up 2% in 2024

f x in Newsletter

The New York Times

milk is culturally inescapable

Why High-Protein Dairy Is Back On The Wellness Radar

Jess Cording, Contributor. © Jess Cording is a dietitian and...

Follow Author

May 21, 2025, 08:15am EDT, Updated May 25, 2025, 09:28am EDT



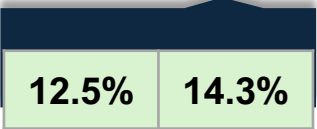
Nicole Kidman Chugged a Glass of Milk on Stage

NEARLY ALL DAIRY CATEGORIES GREW AT RETAIL IN 2025



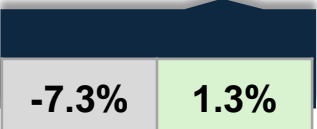
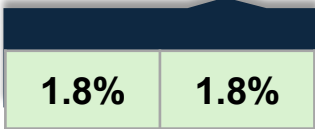
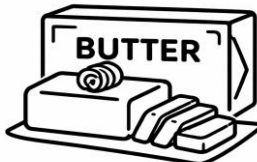
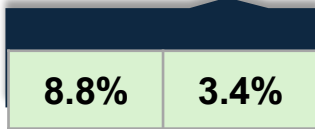
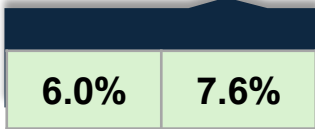
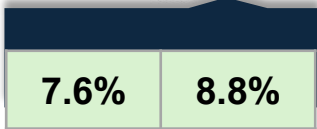
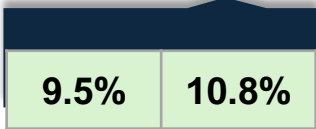
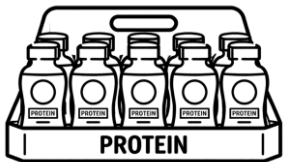
TOTAL U.S. RETAIL VOLUME % CHANGE VS YEAR AGO

2024 and 2025 Volume Growth vs. Previous Year



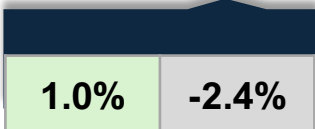
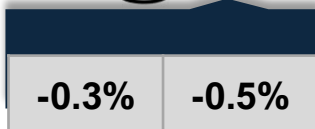
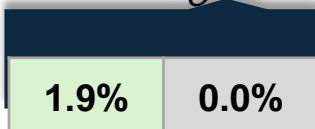
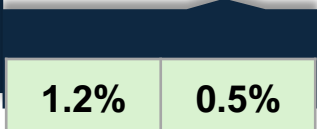
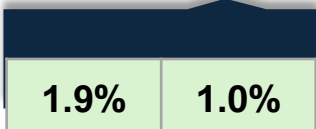
% volume
chg vs
yago

'23-'24 '24-'25



% volume
chg vs
yago

'23-'24 '24-'25



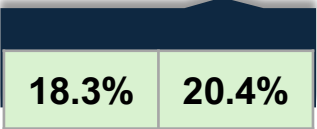
Source: Circana MULO+ with convenience. Note: Butter includes butter blends, Ice Cream includes sherbet, Yogurt is dairy yogurt, Creams include half & half, reg/lt cream & dairy creamers, Cheese excludes imitation/vegan

NEARLY ALL DAIRY CATEGORIES GREW AT RETAIL IN 2025



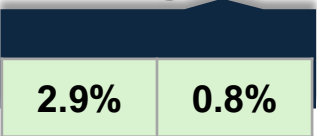
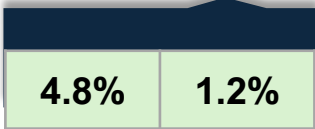
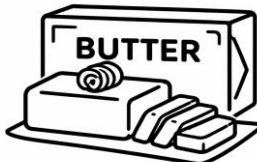
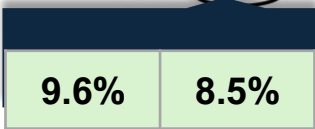
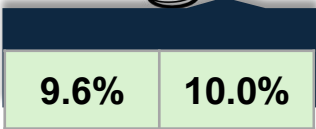
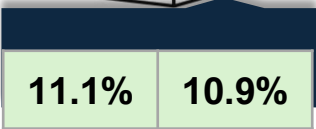
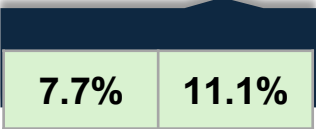
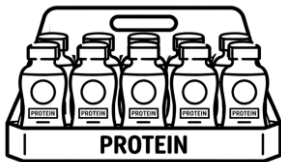
GEORGIA RETAIL VOLUME % CHANGE VS YEAR AGO

2024 and 2025 Volume Growth vs. Previous Year



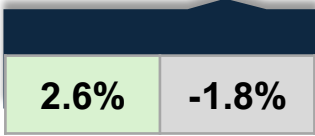
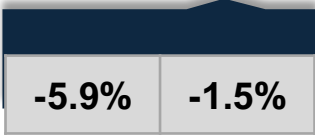
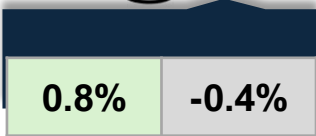
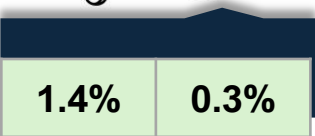
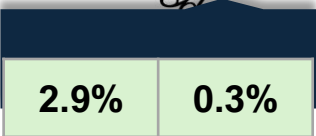
% volume
chg vs
yago

'23-'24 '24-'25



% volume
chg vs
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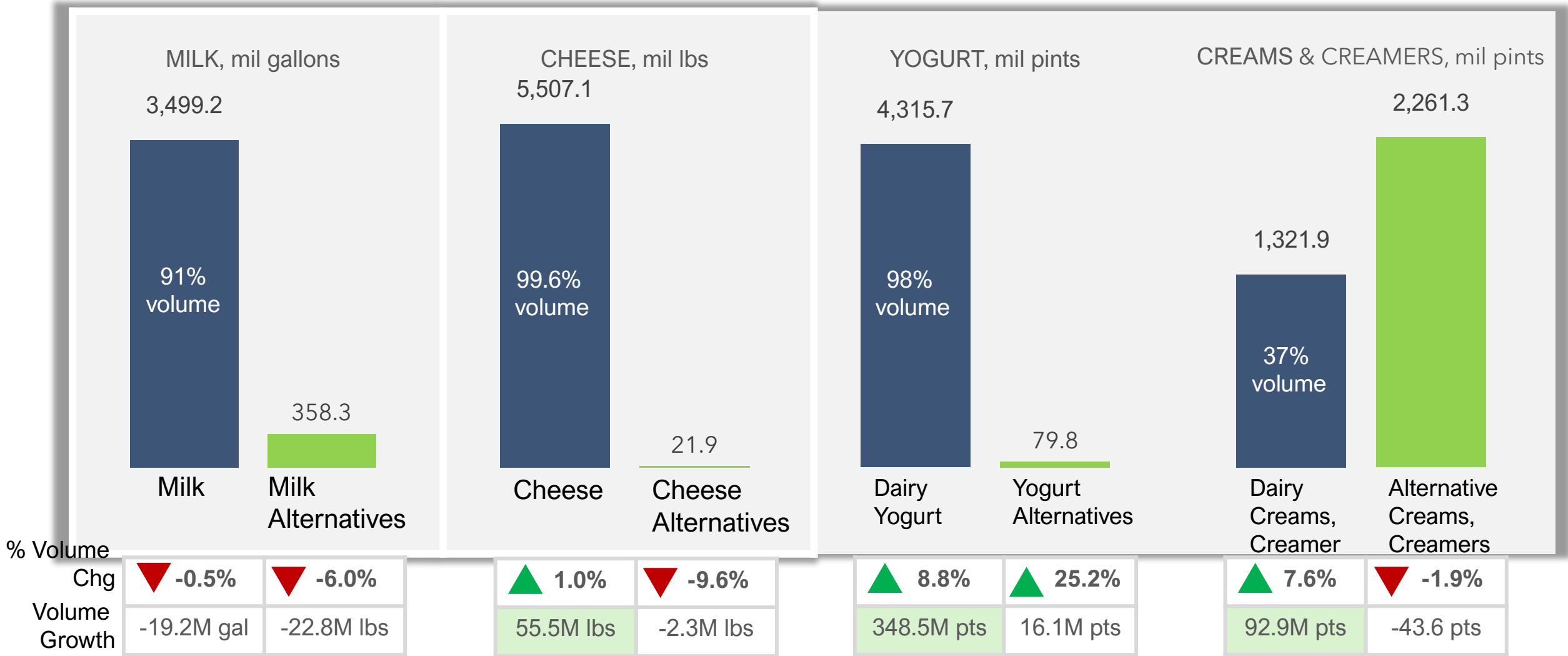
'23-'24 '24-'25



Source: Circana MULO+ with convenience. Note: Butter includes butter blends, Ice Cream includes sherbet, Yogurt is dairy yogurt, Creams include half & half, reg/lt cream & dairy creamers, Cheese excludes imitation/vegan

CHEESE, YOGURT AND CREAM/CREAMERS ARE DELIVERING MORE ABSOLUTE GROWTH THAN NON-DAIRY ALTERNATIVE

2025 Retail Volume Sales and Growth vs. 2024

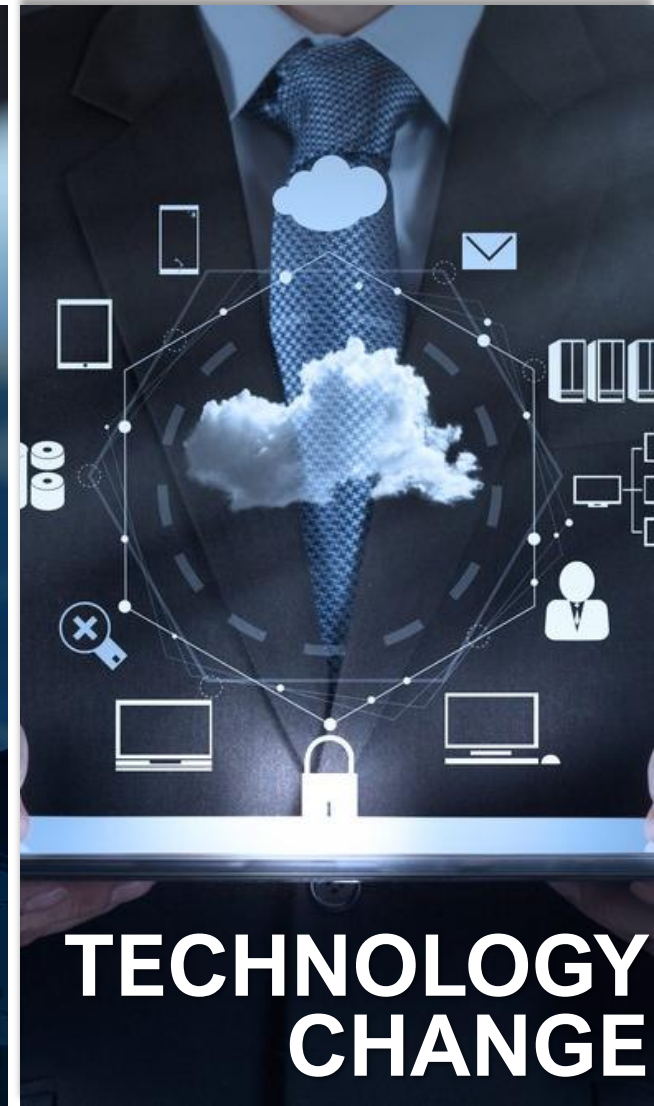


Source: Circana MULO+ with convenience, Total U.S.

THE 2025-2030 DIETARY GUIDELINES FOR AMERICANS



KEEPING FOOD SYSTEM MOVING AMID CHALLENGES





2023-2025 PLAN IMPACT

KEY STRATEGIES TO DELIVER INCREMENTAL VOLUME GROWTH



**Drive scale
through
partners &
Industry**

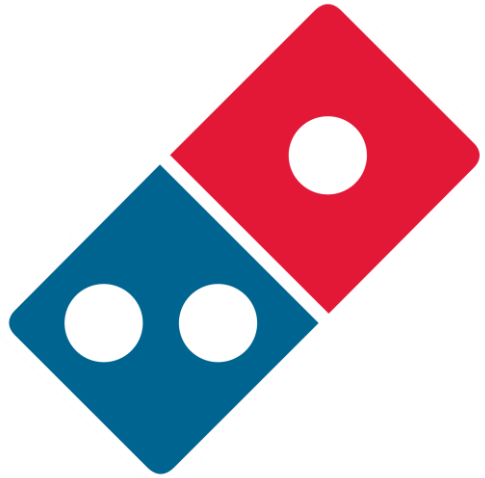


**Inspire
investment in
innovation**



**Stimulate
incremental
usage and
purchase**

STRONG GAINS IN DAIRY UTILIZATION WITH PARTNERS



+9%



+8%



+10%



+3%

Significant innovation and marketing programs drive results

STRONG GROWTH IN YOGURT



The Chobani logo is displayed in a white serif font on a dark green rectangular background. The word "Chobani" is followed by a registered trademark symbol (®).

Chobani®

The Danone logo features the word "DANONE" in a bold, blue, sans-serif font. Below the text is a red, upward-curving arc that resembles a smile.

DANONE

The LALA logo consists of the word "LALA" in a stylized, blue, cursive font. A blue swoosh underline is positioned beneath the letters. To the right of the text is a small red and green butterfly icon.

LALA®

Sharing science and insights that have led to real innovation

EXPANDING PORTFOLIO WITH HEALTH CLAIMS

DANONE



NATIONAL DAIRY COUNCIL RESEARCH ENGINE REMAINS A COMPETITIVE ADVANTAGE

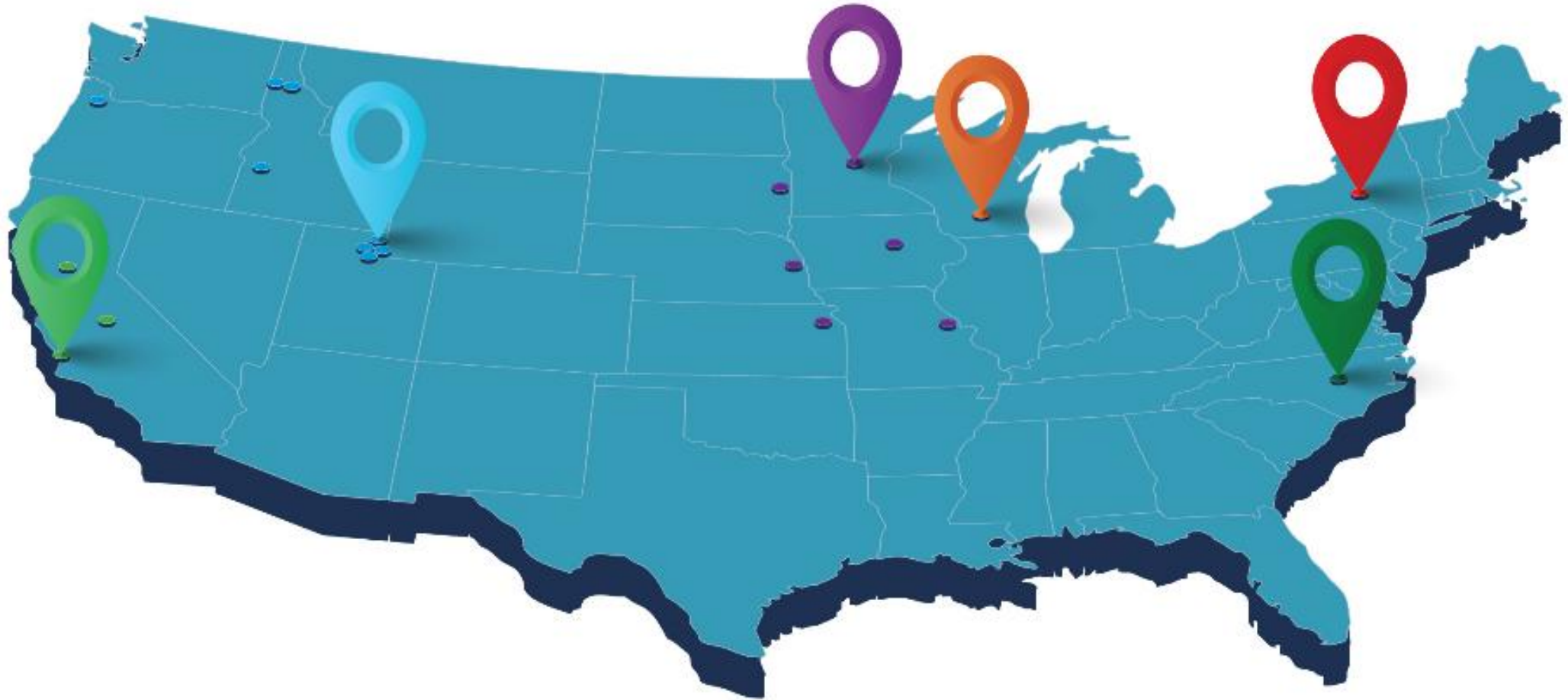
80 active R&D projects

40 nutrition studies

25 scientific papers in credible
professional journals



ATTRACTING FUTURE TALENT TO THE CATEGORY



**CALIFORNIA
DAIRY
INNOVATION
CENTER**

**WESTERN
DAIRY
CENTER**

**MIDWEST
DAIRY
CENTER**

**CENTER
FOR DAIRY
RESEARCH**

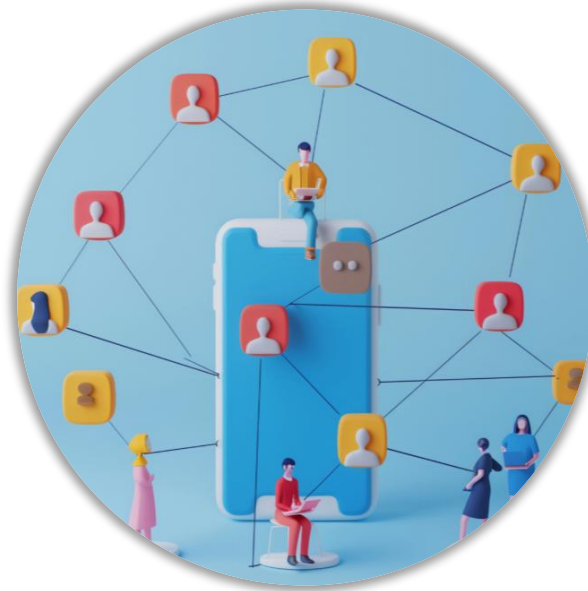
**NORTHEAST
DAIRY FOODS
RESEARCH
CENTER**

**SOUTHEAST
DAIRY FOODS
RESEARCH
CENTER**

KEY STRATEGIC PLAYS FOR REPUTATION



**Improve
Perceptions**



**Increase
Relevance**



**Focus on Health
& Wellness
Benefits**

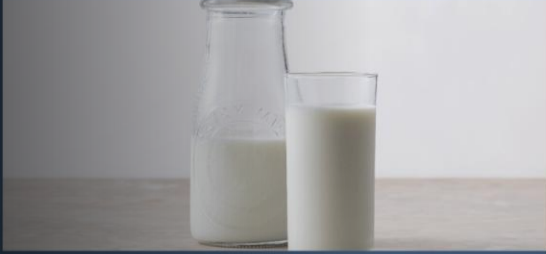
CHAMPION FARMERS & DAIRY IN FIRST 1,000 DAYS





ACCELERATED LAUNCH BY 18 MONTHS





CAPITALIZE ON HISTORIC INVESTMENTS IN RESEARCH,
DISCOVERY R&D, CONSUMER FORESIGHT



TEN YEAR PIPELINE FOR GROWTH

**Heart
Health**

**Weight
Management**

**Gut
Health**

**Mental Health
& Cognition**

**Women's
Health**



AT-HOME TESTING

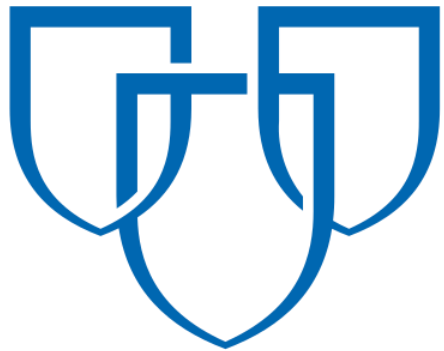


AI-MEDICAL ASSISTANTS



MEDICAL SENSORS

MAYO
CLINIC



UCDAVIS
UNIVERSITY OF CALIFORNIA



SCIENCE, TECHNOLOGY AND INNOVATION



MAKING
EVERY
DROP
COUNT

your
DAIRY
CHECKOFF
Dairy Management Inc.

DRIVING GROWTH NOW & IN THE FUTURE

Three Core Focus Areas Will Deliver Impact

MAKING
EVERY
DROP
COUNT

your
DAIRY
CHECKOFF
Dairy Management Inc.

Unlock New Growth Platforms



Validate Disruptive Nutrition Science



Prove New Product Technology



UNLOCKING GROWTH PLATFORMS

Health & Wellness



\$350B

Beverages



\$100B

Food Service



\$240B

IDENTIFYING TOP HEALTH & WELLNESS GROWTH

Growth Potential Totaling \$350B

ENERGY



2028 Market Size \$11B

PHYSICAL PERFORMANCE



\$45B

SKIN HEALTH



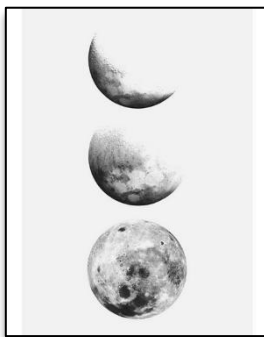
\$44B

MENTAL/ EMOTIONAL H&W



\$9B

SLEEP



\$5B

WEIGHT MANAGEMENT



\$44B

BONE HEALTH



\$46B

ORAL HEALTH



\$12B

VISION



\$2B

HEART HEALTH



\$23B

HAIR & NAIL HEALTH



\$15B

DIGESTIVE HEALTH



\$30B

HYDRATION



\$49B

IMMUNITY



\$6B

H&W Condition Size Including F&B and Non-F&B Projected for CY 2028 (\$B)

DAIRY'S OPPORTUNITY IN HEALTH & WELLNESS



Food | Beverage | OTC Supplements

DISRUPTIVE NUTRITION SCIENCE

Broadening Dairy's Benefits



**Product and
Ingredients**

The diagram features a bright blue background. In the center, a hand is placing a dark grey puzzle piece into a larger, partially assembled puzzle. To the left, a large grey arrow points towards the puzzle. To the right, a large dark grey arrow points away from the puzzle. The puzzle piece being placed is a standard interlocking shape.

**Health & Wellness
Benefits**

DAIRY SCIENCE EFFORTS

Unlocking New Benefits to Power Consumer Wellness

Now



FIRST 1000 DAYS



BONE HEALTH



PERFORMANCE



GUT HEALTH

Future



BIOACTIVES



BETTER SLEEP



**WEIGHT
MANAGEMENT**



**COGNITION
& STRESS**

DRIVING SCIENCE NOW

New Study Shows Butter Benefits vs Margarine/Oils

BUTTER

> 1 tsp. per day



- **Less** insulin resistance
- **Higher levels** of “good” cholesterol (**HDL**)
- **Lower** triglycerides
- **Lower** risk of developing T2D

MARGARINE

> 1.5 tsp. per day



- **29% higher risk** of heart disease
- **41% higher risk** of T2D diabetes

NON-HYDROGENATED OILS



- **Higher** body weight
- **Higher levels** of “bad” cholesterol (**LDL**) by about 8 point

DRIVING SCIENCE NOW

Arming the Industry with Science-Backed Messages

57 Science-Based Messages



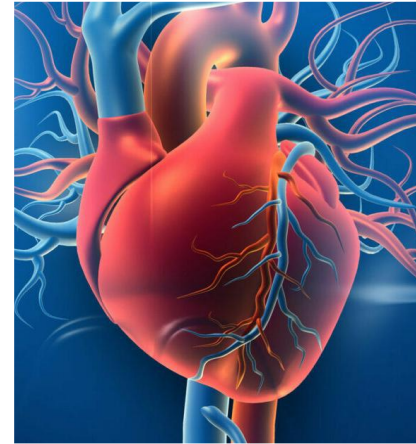
First 1000 Days:

Your baby's **brain doubles** in size in the first year! Cheese and yogurt are nutrient powerhouses providing **essential vitamins and minerals** for early **brain development**.



Grow and Perform:

Milk, cheese or yogurt's **high-quality protein** contains the essential **amino acids** needed for boosting **recovery** and **muscle growth** post-workout.



Health Heart and Weight:

Reducing your risk of heart disease is key to **long-term health**. Delicious milk, cheese and yogurt as part of a balanced diet, are **linked to a lower risk** of hypertension and cardiovascular disease.



Systems Super Charge:

The **best defense is a good offense**. The **nutrients** in milk, cheese and yogurt help **support your immune system** and are **powerhouse** fuel for your overall wellness.

COMMERCIALIZING THE SCIENCE WITH CONSUMERS



MILK'S NUTRIENTS HELP
SUPPORT HEALTHY SLEEP.



GONNA NEED MILK

SHOP NOW >

MILK'S PROTEIN HELPS
BUILD STRONG MUSCLES.



GONNA NEED MILK

SHOP NOW >

MILK HYDRATES
BETTER THAN WATER.



GONNA NEED MILK

SHOP NOW >

From before birth through age 2, or what pediatricians call "The First 1,000 Days," a child's brain, body and immune system undergo a period of rapid development.

Dairy foods help support that remarkable growth by providing essential nutrients like protein, calcium, potassium and iodine.

See dairy differently at usdairy.com



GROWTH CURVE

ARMING THE INDUSTRY

Health & Wellness Playbook



Health & Wellness Playbook

How to effectively showcase dairy's role as a modern health & wellness solution



High Growth Platforms via Partners & Industry



PRIORITIZED GROWTH PLATFORMS

1

**Foodservice
Beverages**



2

**Foodservice
Cheese &
Ingredients**



3

**Retail
Cultured**



4

**Retail
Beverages**



DRIVING THE FUTURE NOW

Foodservice Beverage



Dirty Sodas



Specialty Coffee



Refreshers



**Functional
Beverages**

DRIVING THE FUTURE NOW

Foodservice Cheese



Sandwiches

**Butter BBQ
Chicken Stack**



Breakfast

Stuffed Hashbrown



Appetizers & Sides

**Crispy Cheese-
Stuffed
Chicken Bites**












Chicken & Cheese

Four Cheese Melt

INSPIRING THE FUTURE OF DAIRY AT RETAIL

Via Disruptive Formats

Milk & Cream	Yogurt & Yogurt Drinks	Cheese	RTD	Cottage Cheese	Other Formats
     	          	   	          	   	            

Get Inspired With Our Dairy Innovator Site



Check Out DMI's Dairy Innovation Portal Today



**THE DAIRY
ALLIANCE**

DMI DAIRY
MANAGEMENT
INC.

Product Science & Technology

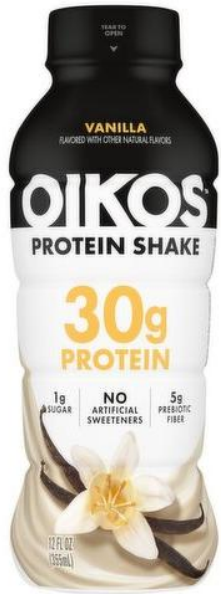


MAGIC OF MILK'S MOLECULES ARE FUELING A POWERFUL
"FAMILY TREE"

FAMILY TREE OF BIOACTIVES AND BENEFITS



PROTEIN R&D LEADERSHIP IMPACTS



AI PLATFORM

Driving Growth in Food as Medicine

CONFIDENTIAL

New Products



Fluid milk for memory with added lactoferrin + collagen for muscle and joint health

New Categories



Travel powder packs for skin health enhanced with lactoferrin and lactobacillus strains

New Claims

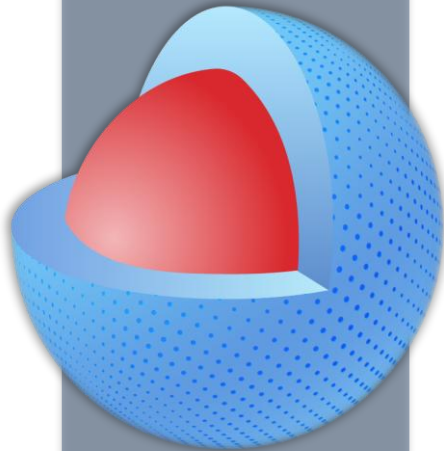


Yogurt for kids with added sphingomyelin for brain development

R&D LEADING TECHNOLOGY

To Deliver Future Growth Using Magic of Milk Molecules

**Lactoferrin
Encapsulation**



**Immunity
\$6B**

**Filtration & Drying
Milk Fat Globule Membrane**



**Cognition
\$9B**

**Fermentation
Bioactive Peptides**

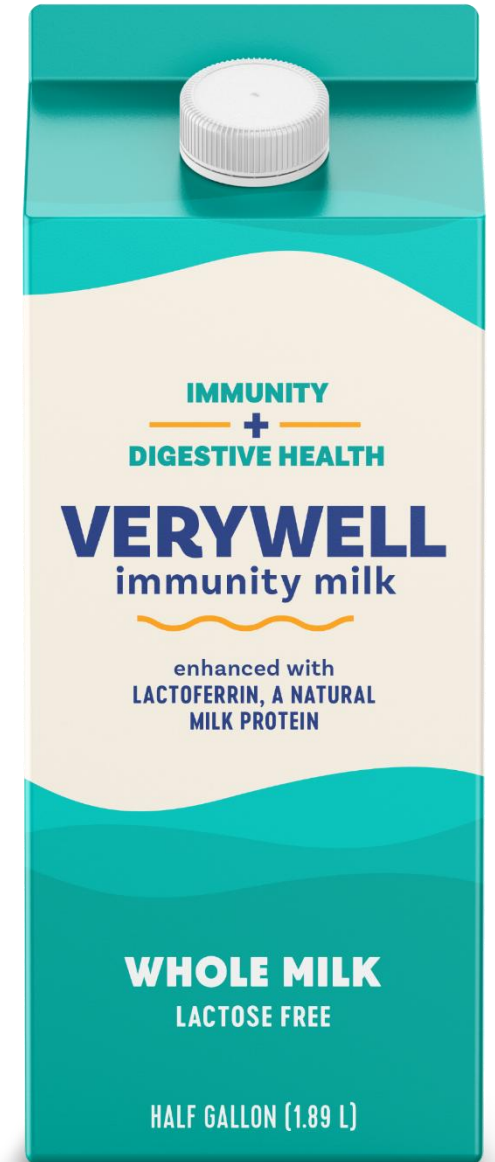


**Healthy
Heart
\$23B**

LACTOFERRIN/IMMUNITY

* Consumer Exploratory Packaging Concepts Only

CONFIDENTIAL



*These statements have not been approved by USDA

TRYPTOPHAN/CALM

* Consumer Exploratory Packaging Concepts Only

CONFIDENTIAL



*These statements have not been approved by USDA

TRYPTOPHAN/SLEEP

* Consumer Exploratory Packaging Concepts Only



*These statements have not been approved by USDA

KEY TAKEAWAYS



Category Leadership: DMI and TDA working together to lead category growth through deep industry and customer engagement and inspiration

Technology: Creating value-added products for domestic and export markets in retail and foodservice channels

Science: Discovering new health benefits to unleash new product claims and marketing messaging

Innovation: Inspiring new growth platforms and new product development