

# North America Concentrated Milk Market By Product Type (Condensed Milk, Evaporated Milk), By End User (Food Services, Food Processing, Retail), By Country, Competition, Forecast & Opportunities, 2020-2030F

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## Abstracts

North America Concentrated Milk Market was valued at USD 1.40 Billion in 2024 and is expected to reach USD 1.91 Billion by 2030 with a CAGR of 4.73% during the forecast period. North America Concentrated Milk Market has been growing at a moderate pace over the past few years, owing to increasing use in food processing and confectionary products. Moreover, rising disposable income, changing consumer purchase pattern and growing health concerns among people are further fueling demand for concentrated milk in the region. In 2023, Americans consumed a record amount of dairy products, driven by a surge in demand for butter and cheese. According to the U.S. Department of Agriculture (USDA), per capita dairy consumption reached 661 pounds per person, marking an increase of 7 pounds compared to the previous year and matching the all-time high set in 2021.

Recent trends indicate a significant shift in American dairy consumption preferences, particularly among younger generations like Millennials and Gen Z. These groups are increasingly reducing their dairy intake, driven by concerns about sustainability and wellness. In contrast, older generations continue to maintain traditional dairy products in their diets. According to the US Department of Agriculture (USDA), per capita dairy consumption reached 653 lbs per person in 2022. Milk remains a staple in 92% of U.S. households, as reported by MilkPEP. However, as dietary habits evolve, average milk consumption has declined. The Dietary Guidelines for Americans (DGA) 2020–2025 recommend 2 to 3 cup equivalents of dairy per day, depending on age, gender, and activity level.

## Market Drivers

### Rising Demand for Dairy Products

The increasing demand for dairy products in North America is one of the primary drivers of the concentrated milk fat (CMF) market. As health-conscious consumers prioritize nutrient-rich and protein-packed foods, dairy products have seen significant growth. The growing preference for high-fat dairy options like cream, butter, and cheese directly boosts the demand for concentrated milk fat, which is a key ingredient in many dairy formulations. The rise in consumer interest in premium dairy products that offer superior taste and texture, such as artisan cheeses and indulgent ice creams, has further propelled the need for CMF. Additionally, the trend towards plant-based and keto diets, which advocate higher fat intake, has led to an increase in the demand for high-fat dairy, boosting CMF consumption. As more people seek rich and creamy flavors in their food, CMF has become a critical ingredient for both traditional and novel dairy products. Recent data from the U.S. Department of Agriculture (USDA) showed that U.S. consumers reached a record-high cheese consumption in 2022, with per capita intake nearing 42 pounds. Overall dairy consumption amounted to 653 pounds per person. Additionally, both butter and cheese consumption set new all-time records in 2023, with butter reaching 6.5 pounds and cheese hitting 42.3 pounds per person.

### Technological Advancements in Dairy Processing

Advancements in dairy processing technologies have significantly contributed to the growth of the concentrated milk fat market. Over the years, improvements in milk concentration techniques such as ultra-filtration, evaporation, and membrane filtration have made the production of CMF more efficient and cost-effective. These technologies enable manufacturers to produce high-quality concentrated milk fat while minimizing waste, resulting in higher yields and reduced production costs. Furthermore, innovations in refrigeration, packaging, and preservation techniques have helped dairy companies extend the shelf life of CMF-based products. This ensures that concentrated milk fat can be distributed widely and maintain its quality over time. The development of clean-label and organic production techniques has also attracted a growing number of health-conscious consumers who seek natural and minimally processed dairy products. These technological advancements not only improve production efficiency but also allow manufacturers to meet the rising demand for high-quality, sustainably produced dairy ingredients. The ability to produce a wide variety of CMF products that cater to different market segments, from traditional dairy products to specialized functional foods, has expanded the overall market potential.

## Growth of the Food and Beverage Industry

The booming food and beverage industry in North America has played a critical role in driving the concentrated milk fat market. With the rapid pace of food innovation and increasing consumer demand for indulgent and premium food experiences, CMF has become an essential ingredient for manufacturers seeking to deliver rich, creamy, and flavorful products. In the bakery and confectionery sectors, concentrated milk fat is widely used in the formulation of creams, fillings, and frostings, where its superior texture and flavor-enhancing properties are highly valued. The expanding demand for ice creams, chocolates, and other sweet treats with rich, creamy textures has contributed significantly to the need for CMF. In the processed food sector, CMF serves as an essential component in ready-to-eat meals, sauces, dressings, and snacks. As consumers continue to seek convenience without compromising on taste, the food industry increasingly relies on concentrated milk fat to create high-quality products that align with consumer preferences. Moreover, the rise in foodservice establishments, including cafes, restaurants, and fast-food chains, has led to higher demand for CMF as a versatile ingredient for a wide range of menu offerings. As the food and beverage sector continues to evolve with trends like clean labeling, natural ingredients, and premium quality, the demand for concentrated milk fat remains robust, driving growth in the market.

## Key Market Challenges

### Fluctuating Raw Material Prices

One of the major challenges in the North American concentrated milk fat (CMF) market is the fluctuation in the prices of raw materials, particularly milk. The dairy industry is highly sensitive to changes in the prices of milk due to factors such as weather conditions, feed costs, and global supply chain disruptions. These fluctuations can make it difficult for manufacturers to maintain consistent production costs, affecting their pricing strategies and profit margins. When raw milk prices rise due to factors like droughts or feed shortages, producers of concentrated milk fat face increased input costs. This can force them to either absorb the cost increases, which can reduce profitability, or pass the cost on to consumers, potentially leading to reduced demand. On the other hand, when milk prices fall, producers may struggle to maintain production efficiency, as lower-quality milk could result in inconsistent CMF quality. The volatility in milk prices also impacts the long-term sustainability of dairy producers, especially small and medium-sized businesses that may not have the resources to withstand price

fluctuations.

## Regulatory Compliance and Standards

Another significant challenge facing the North American concentrated milk fat market is the complexity of regulatory compliance and varying standards across regions. In both the United States and Canada, dairy products, including CMF, are subject to stringent regulations set by authorities such as the U.S. Food and Drug Administration (FDA) and the Canadian Food Inspection Agency (CFIA). These regulations cover aspects such as product labeling, quality control, health claims, and food safety standards. As consumer preferences shift toward healthier, cleaner ingredients, there is an increasing demand for natural and organic products. However, dairy companies must navigate complex and often evolving regulatory frameworks that govern the use of ingredients, claims about health benefits, and the certification of products. For example, any changes in labeling laws could affect the way CMF products are marketed, requiring businesses to update packaging or marketing campaigns, which can involve significant costs and time. Furthermore, the regulations governing milk production, animal welfare, and environmental sustainability are becoming more stringent in North America.

## Key Market Trends

### Health-Conscious Consumer Behavior

Health-consciousness is one of the primary drivers in the North American concentrated milk market. As more consumers become increasingly aware of the impact of their dietary choices on their well-being, the demand for healthier, nutrient-dense products is surging. Concentrated milk products, such as evaporated milk and sweetened condensed milk, are evolving to meet these health trends by offering improved nutritional profiles. Manufacturers are focusing on producing milk with higher protein content, lower sugar levels, and added vitamins and minerals, appealing to consumers who want to integrate functional foods into their diet. This includes incorporating probiotics, omega-3 fatty acids, and other beneficial components, positioning concentrated milk as a nutritious and convenient option for modern consumers. The trend toward clean label products that are free from artificial additives, preservatives, and unnecessary ingredients is also influencing the production of concentrated milk. Consumers are increasingly opting for dairy products that are minimally processed and made with natural ingredients, reflecting a broader shift in the food industry towards transparency and health-conscious choices. In addition, with the growing popularity of plant-based and lactose-free diets, dairy alternatives are gaining traction. The market

for lactose-free concentrated milk, which caters to consumers with lactose intolerance, is expanding rapidly. This trend reflects the evolving nature of consumer preferences, where health and dietary restrictions are paramount in purchasing decisions.

### Technological Advancements in Dairy Processing

Technological innovation in dairy processing is another major trend shaping the concentrated milk market in North America. The development of advanced processing techniques such as ultrahigh-temperature (UHT) pasteurization, spray drying, and evaporative concentration methods is allowing manufacturers to produce concentrated milk with longer shelf lives, enhanced flavors, and improved consistency. UHT processing, for example, significantly extends the shelf life of concentrated milk without the need for refrigeration, making it an attractive option for consumers seeking convenience and long-lasting products. UHT milk, which can be stored at room temperature for extended periods, appeals to busy consumers and those looking for pantry-friendly dairy products. This technology also reduces the risk of food waste, as products can remain fresh for longer. The shift toward more efficient, energy-saving processing methods is also contributing to the reduction of costs in production, making concentrated milk more affordable for consumers. This helps to meet the rising demand for dairy products while optimizing manufacturing processes. As manufacturers continue to invest in technology, the market is seeing improvements in the texture, taste, and quality of concentrated milk products, leading to greater consumer satisfaction.

### E-Commerce and Expanding Distribution Channels

The growth of e-commerce and the expansion of distribution channels are critical trends in the North American concentrated milk market. The rise of online grocery shopping, accelerated by the COVID-19 pandemic, has significantly transformed how consumers access dairy products, including concentrated milk. E-commerce platforms offer convenience, allowing consumers to purchase concentrated milk and have it delivered to their doorsteps, often with the ability to shop from a wider variety of brands than what is available in brick-and-mortar stores. Online grocery shopping is particularly popular among busy households, millennial consumers, and health-conscious individuals who prefer the convenience of having products like concentrated milk delivered directly to their homes. This shift toward online buying is supported by increased investments in delivery infrastructure, including same-day delivery and subscription-based services, which allow for regular replenishment of essential goods. Traditional distribution channels, including supermarkets, hypermarkets, and convenience stores, continue to be essential for the sale of concentrated milk, especially in rural and suburban regions

where online shopping might be less prevalent. However, these channels are evolving, with retailers adopting more efficient stocking methods and offering greater product variety to meet the needs of consumers. The expansion of concentrated milk offerings in both large retail outlets and niche grocery stores is making these products more accessible to a wider audience.

## Segmental Insights

### Product Type Insights

Condensed milk was the dominating segment in the North American concentrated milk market due to its long shelf life, versatility, and widespread use in a variety of culinary applications. The high sugar content in sweetened condensed milk not only acts as a preservative but also contributes to its rich flavor, making it a staple in desserts, beverages, and baking. This makes condensed milk highly popular for both home use and in foodservice sectors such as cafes, restaurants, and bakeries. In addition to its versatility, the growing demand for convenience foods and ready-to-use ingredients has further driven the popularity of condensed milk. It provides a convenient option for consumers and chefs alike, as it eliminates the need for additional sweeteners and simplifies recipes, especially in making confections like fudge, caramel, and pies. Furthermore, with increasing awareness of the nutritional benefits of dairy products, such as protein content and vitamins, condensed milk is seen as an affordable and convenient source of dairy nutrition. The increasing trend towards indulgent snacks and desserts, particularly in North America, continues to boost the demand for condensed milk products. As a result, it remains the largest and most dominant segment in the concentrated milk market in the region.

### Country Insights

The United States was the dominant country in the North American Concentrated Milk Market, driven by its large-scale dairy production, advanced processing technologies, and high consumer demand for concentrated dairy products. The U.S. is a major producer and exporter of dairy products, supported by an extensive network of dairy farms and state-of-the-art processing facilities. This enables a consistent and reliable supply of concentrated milk products such as evaporated milk, condensed milk, and powdered milk. Consumer preferences in the U.S. lean towards convenience and long shelf-life products, which makes concentrated milk particularly popular in households and foodservice industries. The increasing demand for ready-to-eat foods, desserts, and beverages that incorporate concentrated milk is further boosting the market.

Additionally, the U.S. market sees innovation in concentrated milk products, including organic, flavored, and fortified options, to cater to diverse dietary preferences and health trends. The U.S. government's support for the dairy industry through subsidies and initiatives also strengthens the market. Furthermore, the growing trend of dairy-based snacks and beverages, alongside rising interest in functional and fortified milk products, ensures sustained demand. As the largest market in North America, the U.S. is expected to continue leading the concentrated milk segment, contributing significantly to the region's market growth.

### Key Market Players

Nestle S.A.

Eagle Family Foods, LLC

Dairy Farmers of America, Inc.

Santini Foods, Inc.

Saputo Inc.

O-AT-KA Milk Products Cooperative, Inc.

Parmalat Canada Inc.

Goya Foods, Inc.,

Organic Valley

Aurora Organic Dairy

### Report Scope:

In this report, the North America Concentrated Milk Market has been segmented into the following categories, in addition to the industry trends which have also been detailed below:

#### North America Concentrated Milk Market, By Product Type:

*North America Concentrated Milk Market By Product Type (Condensed Milk, Evaporated Milk), By End User (Food Se...*

Condensed Milk

Evaporated Milk

North America Concentrated Milk Market, By End User:

Food Services

Food Processing

Retail

North America Concentrated Milk Market, By Country:

United States

Mexico

Canada

Competitive Landscape

Company Profiles: Detailed analysis of the major companies presents in the North America Concentrated Milk Market.

Available Customizations:

North America Concentrated Milk Market report with the given market data, TechSci Research offers customizations according to a company's specific needs. The following customization options are available for the report:

Company Information

Detailed analysis and profiling of additional market players (up to five).

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