



## 2011-2012 Projected School Milk Product Profile

---

*Average Calorie & Added Sugar Levels  
July 2011*

# Background

- For each of the past six years, MilkPEP has engaged Prime to conduct the MilkPEP Annual School Survey. The survey is a joint project of MilkPEP, National Dairy Council and the School Nutrition Association.
- In mid-July, MilkPEP asked Prime to conduct a quick survey to project the school milk offerings for the year about to start (2011-2012). The one-page survey was emailed to all Processors who received the Annual Survey request.
- Responses were received from Processors who collectively serve over 51,000, or 53%, of all K-12 public schools. The responses for '11-'12 were added to the tracking over the prior five years on the following charts.

**MilkPEP**  
Milk Processor Education Program

**Fall 2011 School Product Offering - Quick Survey**  
*Please respond by Tuesday July 26th*

MilkPEP needs your support in helping to understand your school product offerings for fall 2011. This information will help us develop communication programs about how the industry is responding to challenges to flavored milk. All responses will be kept confidential and only used to develop industry-wide examples. If you have any questions or need help completing the survey, please call Devo, Nina or Barb at Prime Consulting Group at (847) 943-1177.

Company: \_\_\_\_\_ Email: \_\_\_\_\_  
Name: \_\_\_\_\_ Address: \_\_\_\_\_  
Title: \_\_\_\_\_ City, State, ZIP: \_\_\_\_\_  
Phone: \_\_\_\_\_

1. Please tell us approximately how many schools your dairy serves.  
\_\_\_\_\_ Elementary \_\_\_\_\_ Secondary (Middle & High School)

2. How many processing plants are contained in the data you are reporting in this survey? \_\_\_\_\_

3. Please answer the following question about 8 oz. milk served in schools.  
A. Indicate your expectation of the mix of school milk by fat level for White and Chocolate.

White \_\_\_\_\_ Skim/Fat Free \_\_\_\_\_% 1% \_\_\_\_\_% 2% \_\_\_\_\_% Whole \_\_\_\_\_% = 100%  
Chocolate \_\_\_\_\_ Skim/Fat Free \_\_\_\_\_% 1% \_\_\_\_\_% 2% \_\_\_\_\_% Whole \_\_\_\_\_% = 100%

B. What is the calorie count and grams of sugar for your school Chocolate milk?

	Calories	Grams
Skim/Fat Free Chocolate _____	_____	_____
3% Chocolate _____	_____	_____
1% Chocolate _____	_____	_____
2% Chocolate _____	_____	_____

} *Fill in all that apply*

C. Please estimate the portion of your flavored milk that is sweetened with:  
Sugar \_\_\_\_\_% HFCS \_\_\_\_\_% = 100%

D. Are you introducing lower calorie/grams of sugar product this fall?  Yes  No  
If "Yes", how much lower? \_\_\_\_\_ Calories \_\_\_\_\_ Grams of Sugar

E. What portion of your schools do you estimate will use the reformulated product? \_\_\_\_\_%

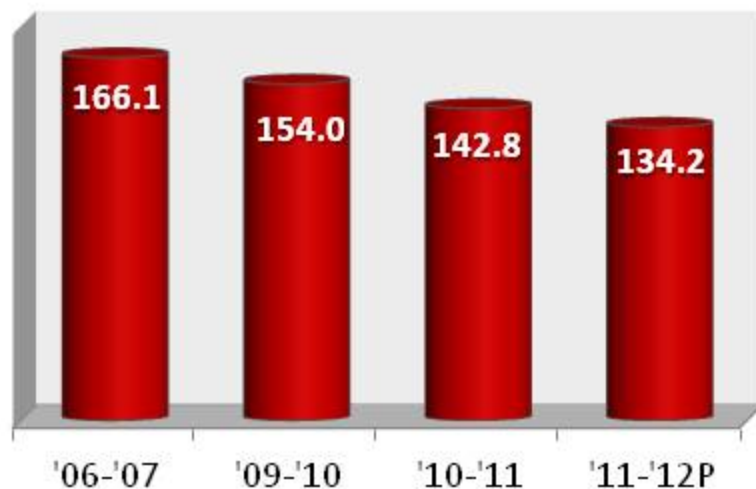
F. Are any of your schools eliminating flavored milk availability for this fall?  
 Yes  No → If "Yes", enter number of schools \_\_\_\_\_ and provide district names below.  
\_\_\_\_\_  
\_\_\_\_\_

**PLEASE MAIL, EMAIL, OR FAX COMPLETED SURVEY BY JULY 26, 2011 to:**  
Prime Consulting Group • 2275 Half Day Road Suite 127 • Bannockburn, IL 60015  
Fax 847.943.1177 • barb@primeconsulting.biz  
**THANK YOU FOR YOUR TIME!**

1250 H Street, NW, Suite 900 • Washington, DC 20005

# Avg Flavored Milk Has 32 Fewer Calories than 5 Years Ago

*Avg. Calories in 8 oz. of Flavored Milk*



- The average flavored milk serving in schools this Fall is projected to be 134 calories, nearly 9 calories less than last year.
- Flavored milk will then be only 31 calories more than the white milk in school.
- 66% of Processors report newly reformulated product will be offered this Fall. The most common Chocolate offering will be fat free with 130 calories, and only 10 added grams of sugar.

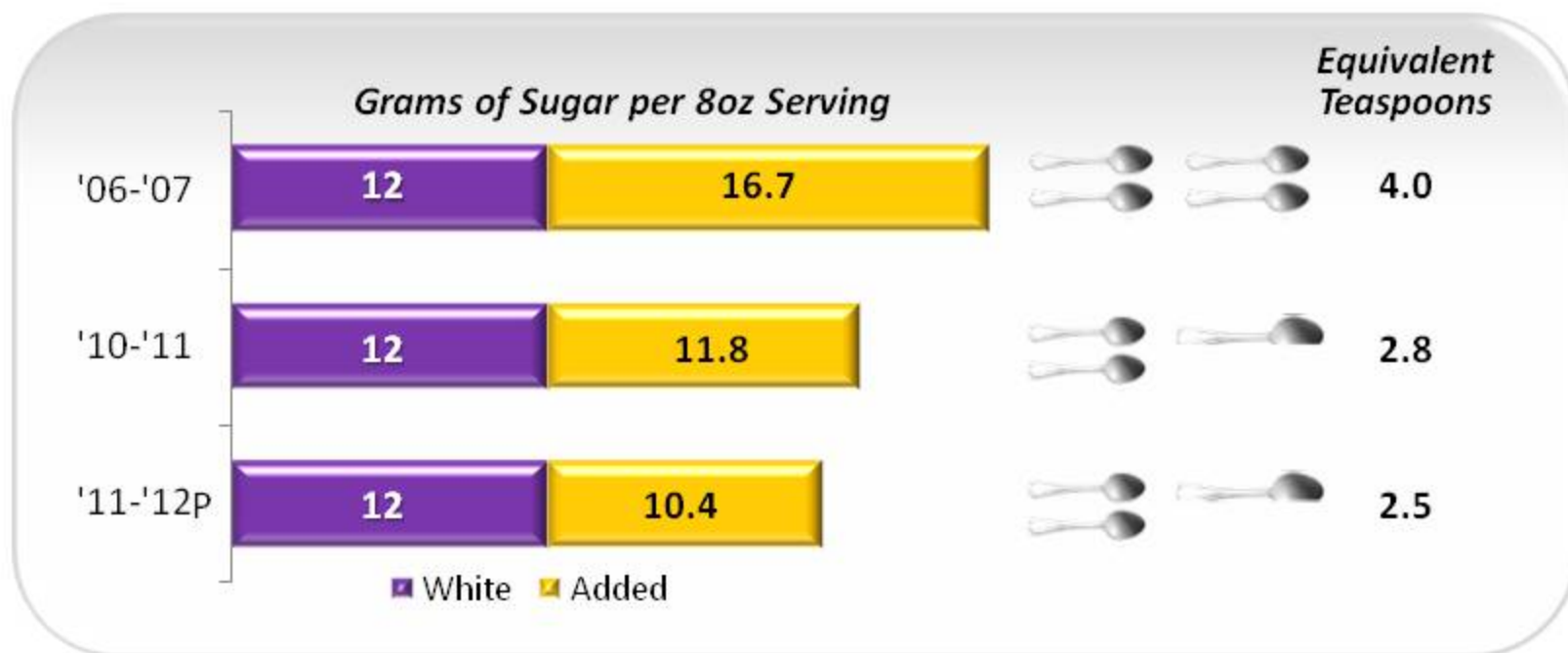
**AVERAGE CALORIES PER 8 OZ OF MILK IN SCHOOLS**  
*by School Year*

	'06-'07	'07-'08	'08-'09	'09-'10	'10-'11	'11-'12P	3 Yr Change	
White	110.8	107.8	106.2	105.8	104.3	103.1	-7.7 calories	-7%
Flavored	166.1	160.4	156.2	154.0	142.8	134.2	-31.9 calories	-19%
<b>TOTAL</b>	<b>150.0</b>	<b>144.1</b>	<b>141.2</b>	<b>140.0</b>	<b>131.0</b>	<b>124.6</b>	<b>-25.4 calories</b>	<b>-17%</b>

## Added Sugar has Declined 38% (in School Chocolate Milk)

The total sugar level in Chocolate milk has declined by 6 grams per serving over five years.

Added sugar has declined 38% (from 16.7g to 10.4g), while the sugar from cow's milk (lactose) has not changed (~12g per serving).



Many Processors are changing from High Fructose Corn Syrup (HFCS) as the sweetener. Sugar is projected to be used in 51% of all flavored milk units, up from 18% last year.

# Sugar Levels Have Declined by 6 Grams per Serving Over 5 Years

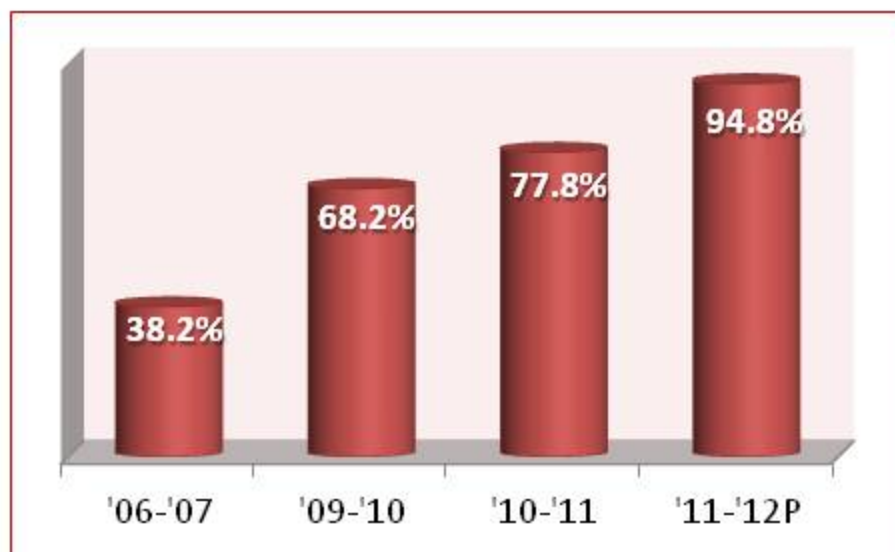
<i>Gallon Mix <sup>1</sup></i>			<i>Grams of Sugar per 8 oz Serving</i>			
<i>'10-'11</i>	<i>'11-'12P</i>	<i>Fat Level</i>	<i>'06-'07</i>	<i>'10-'11</i>	<i>'11-'12P</i>	<i>Change</i>
0.6%	0.6%	2%	25.8	24.0	24.9	-0.9
52.4%	18.7%	1%	29.5	24.0	24.9	-4.6
10.6%	---	.5%	NA	23.8	---	---
36.1%	80.7%	<b>Fat Free</b>	28.3	23.4	21.8	-6.5
<i>Average</i>			<b>28.7</b>	<b>23.8</b>	<b>22.4</b>	<b>-6.3</b>

Processors are predicting a dramatic mix shift to Fat Free. Many of them and their customers are not waiting for the new meal pattern rules to be announced.

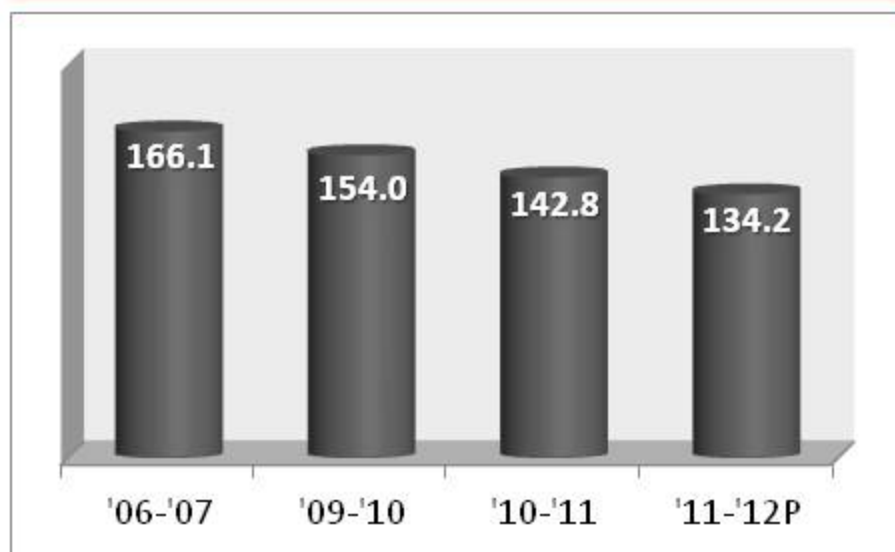
<sup>1</sup> *Gallon Mix for All Flavors*  
*NA – Not Available*

# 95% of Flavored Milk Will Be Under 150 Calories This Year

*Portion of Flavored Milk  
≤ 150 Calories*



*Average Calories in 8 oz.  
Serving of Flavored Milk*



-31.9 Calories  
(-19.2%)