



Cider in Estonia

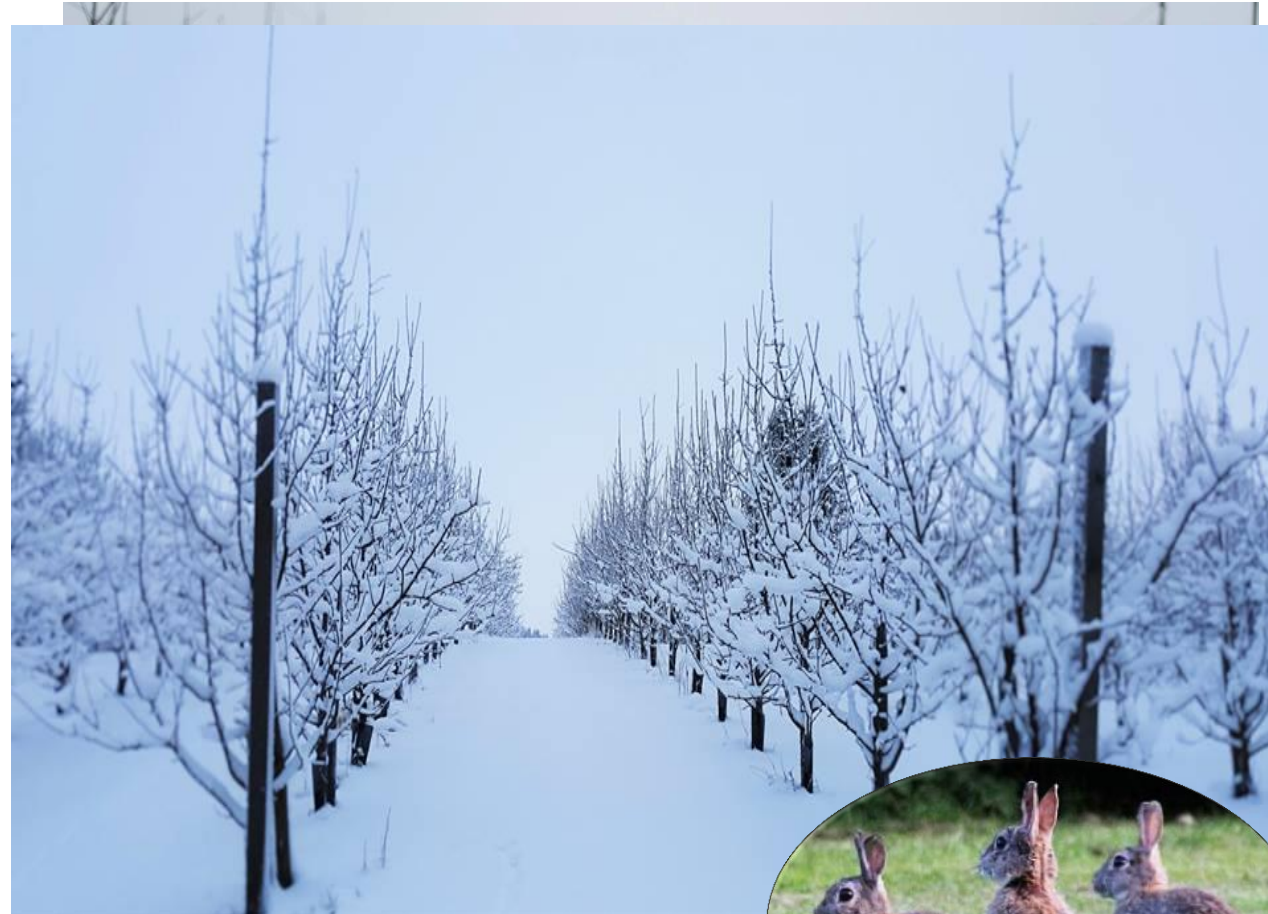
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Estonia – „Apple country“

- Excellent climate for premium class cider apples
- Craft cider boom – new orchards
- Number of producers/production volumes on the rise



Cider definition by law

- Made from apple juice (fresh or from concentrate)
- Fermentation – full or partial
- Alcohol content: 1,2%Vol – (changed Sept. 2017, upper limit was 8,5%Vol)
- Can be added:
 - ❖ pear juice, water, sugar products → before or after the fermentation
 - ❖ apple juice or apple juice concentrate → after fermentation
- Carbonization: secondary fermentation or force carbonization
- Addition of distilled alcohol is not allowed
- Flavors, acids, preservatives, etc.

Cider role in Estonia

Sweet drink with alcohol and flavorings prior to craft cider boom (2013/2014)

Change in imago – natural, local apples, wild fermentation, old traditions, cloudy, no flavorings, clean label, etc.

Craft cider is a trendy drink with higher value than carft beer.

Problems:

- ❖ „Apple juice gone bad“/„very sour yeasty drink“
- ❖ „Bad“ craft cider available on the market
- ❖ Tax difference between small beer producers and cider producers
- ❖ „Why it is so expensive? It is just an apple juice!“
- ❖ Craft cider imitations by big producers – consumers are confused



Cider – consumer understanding

Naïve consumers



Conscious consumers

„Artificial“



???

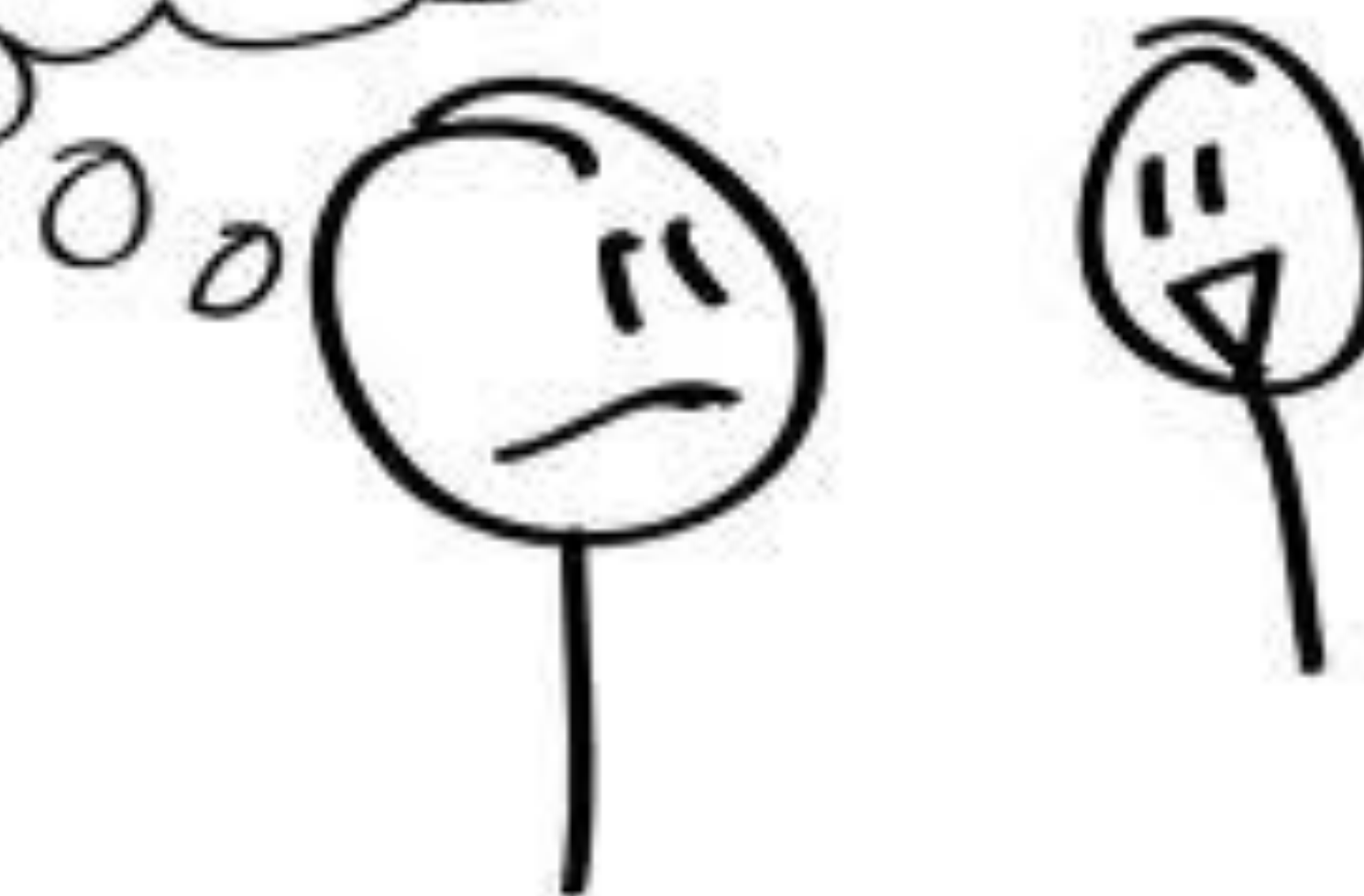


„Natural“





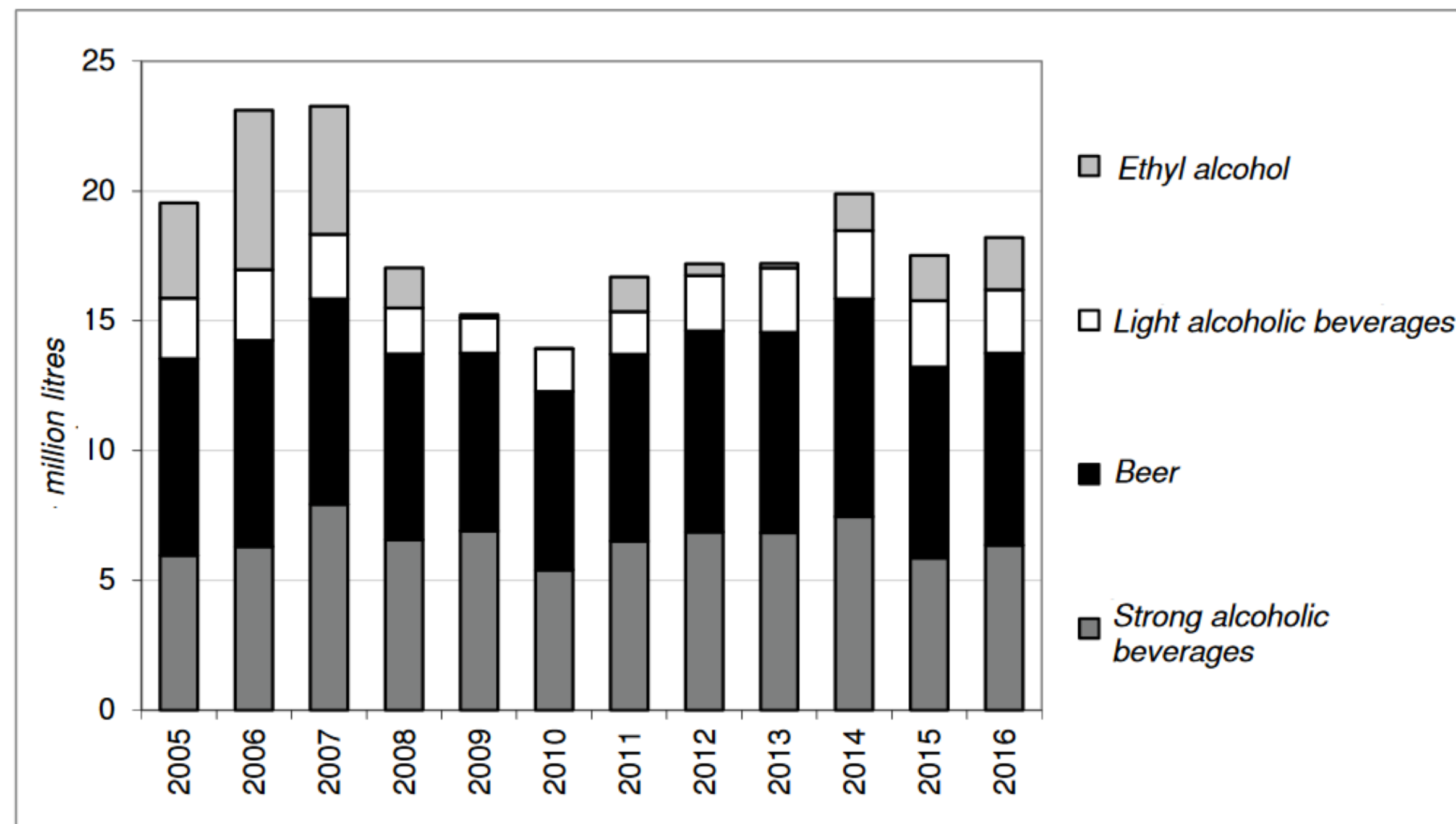
oh please make
this simple . . .



Now to numbers...

- Production: 2016. approx. **26 million liters** light fermented alcoholic beverages (cider!)
- Compared to year 2015: -6% (mainly drinks with added ethanol)

Production of alcoholic beverages in 2005–2016, in 100% alcohol



Sources: Estonian Alcohol Market, Estonian Institute of Economic Research; Statistics Estonia

Export and import

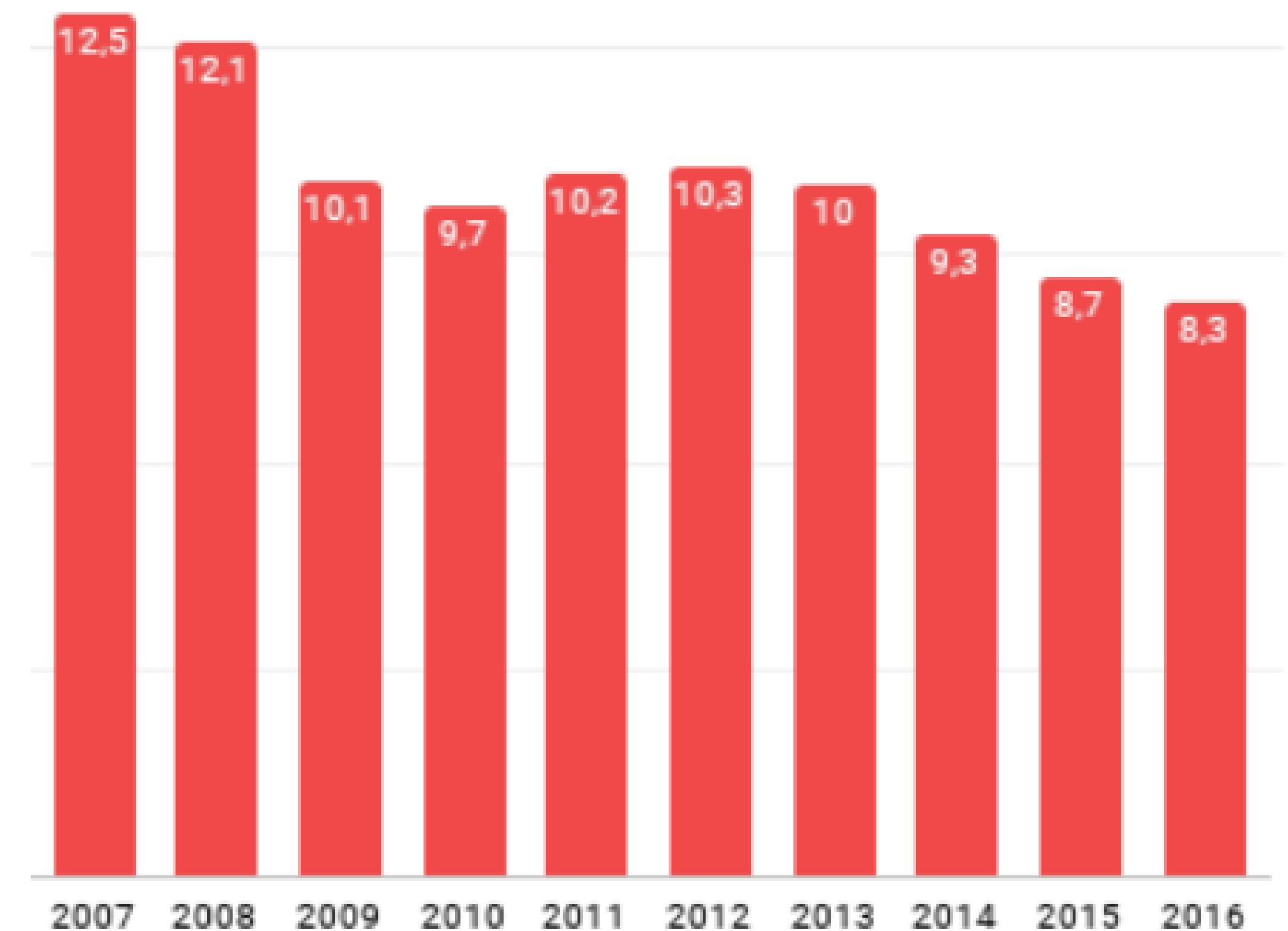
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How much is too much?

Consumption – liters per capita in 100% alcohol

WHO „claims“ that 6 liters per capita in 100% alcohol is „too much“ – bigger consumption will affect public health negatively

In 2016, the consumption in Estonia was 8,3

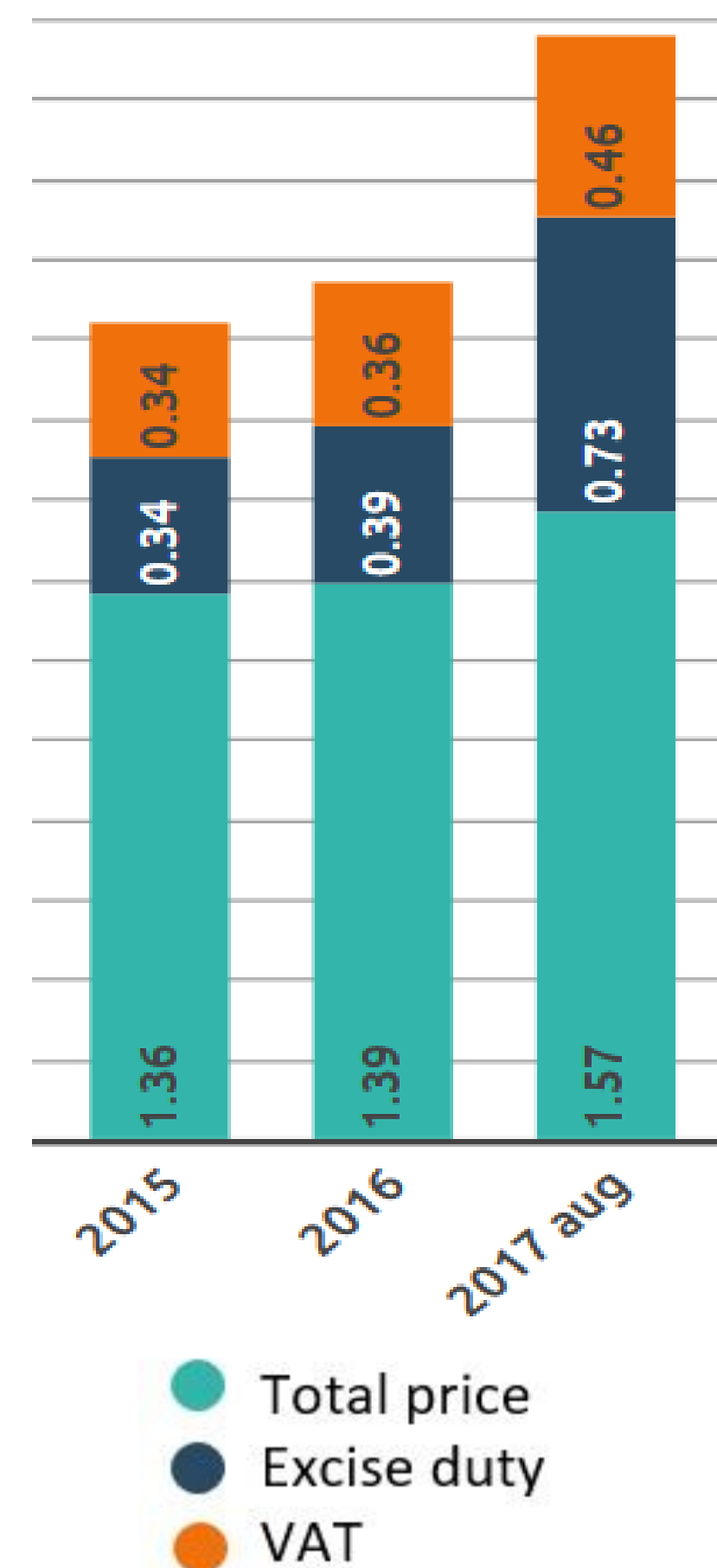


What happened?

We should raise alcohol
excise duty!



Beer(4,7%Vol) price, €/L

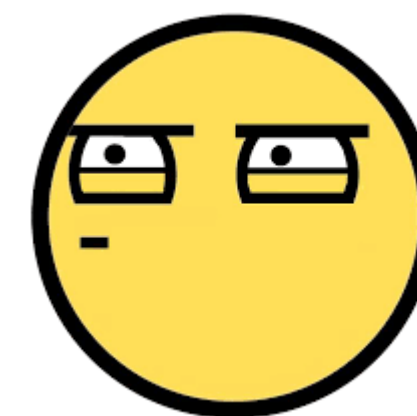


Constant rise of excise duty

	01.02.2017	01.07.2017	01.02.2018	Unit
Beer *	9,13 €	15,52 €	18,26 €	per 1% of ethyl alcohol by volume in 100L
Fermented drink, ethanol content ≤6%Vol	53,41 €	77,44 €	91,30 €	100 L
Fermented drink, ethanol content >6%Vol	123,18 €		147,82 €	100 L

*Small beer producer who produced last year less than 6000 hL, has to pay 50% less excise duty until 6000 hL is exceeded

BUT CIDER???



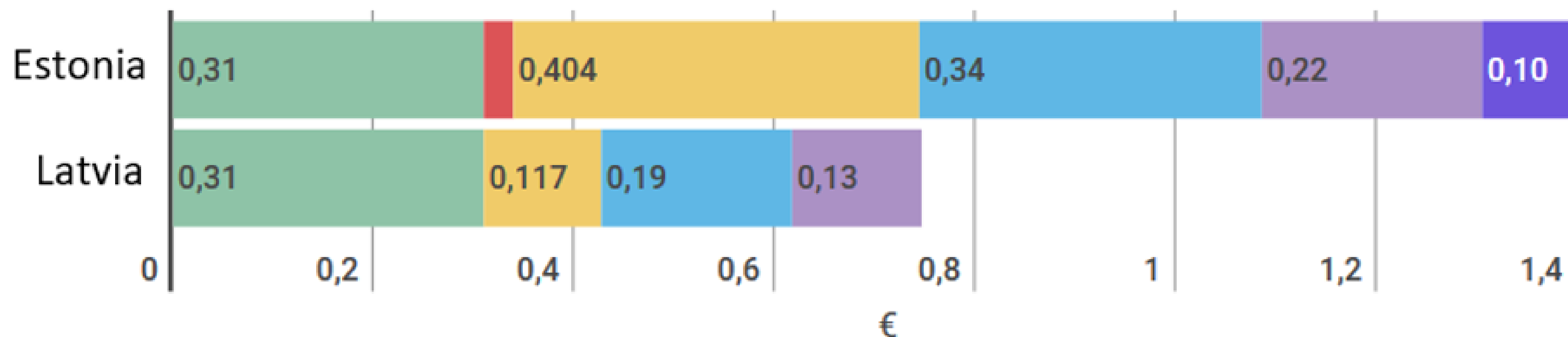
What happened then?





Price difference

Price of 0,5L beer, 5,2%Vol



Result



Compared to 2016, in 2017 alcohol excise revenue recieved by the state budget was 16% smaller

Compared to planned state budged the recieved alcohol exice revenue was approx. 38-56 M€ smaller (estimated)



Research & development

The beginning of cider research...

2011, Project:

„The manufacture of premium-class fermented apple juice products based on apple cultivars grown in Estonia“

Sensory and chemical analysis

❖ raw material

❖ cider

Seasonal variation

Ripeness

Yeast

Malolactic fermentation

Nutrients



Research focus at the moment

Local apple cultivars + yeasts → best possible combinations in terms of end product quality

More detailed descriptions and classification of apple cultivars – the best cultivars could be as well known as grape cultivars for wine

Yeast applications for cider

Non-*Saccharomyces* yeast – hidden potential!

Apple pomace – 3 years project



Thank you for your attention!

Cheers!

Terviseks!

