



# United States Association of Cider Makers



# New Players



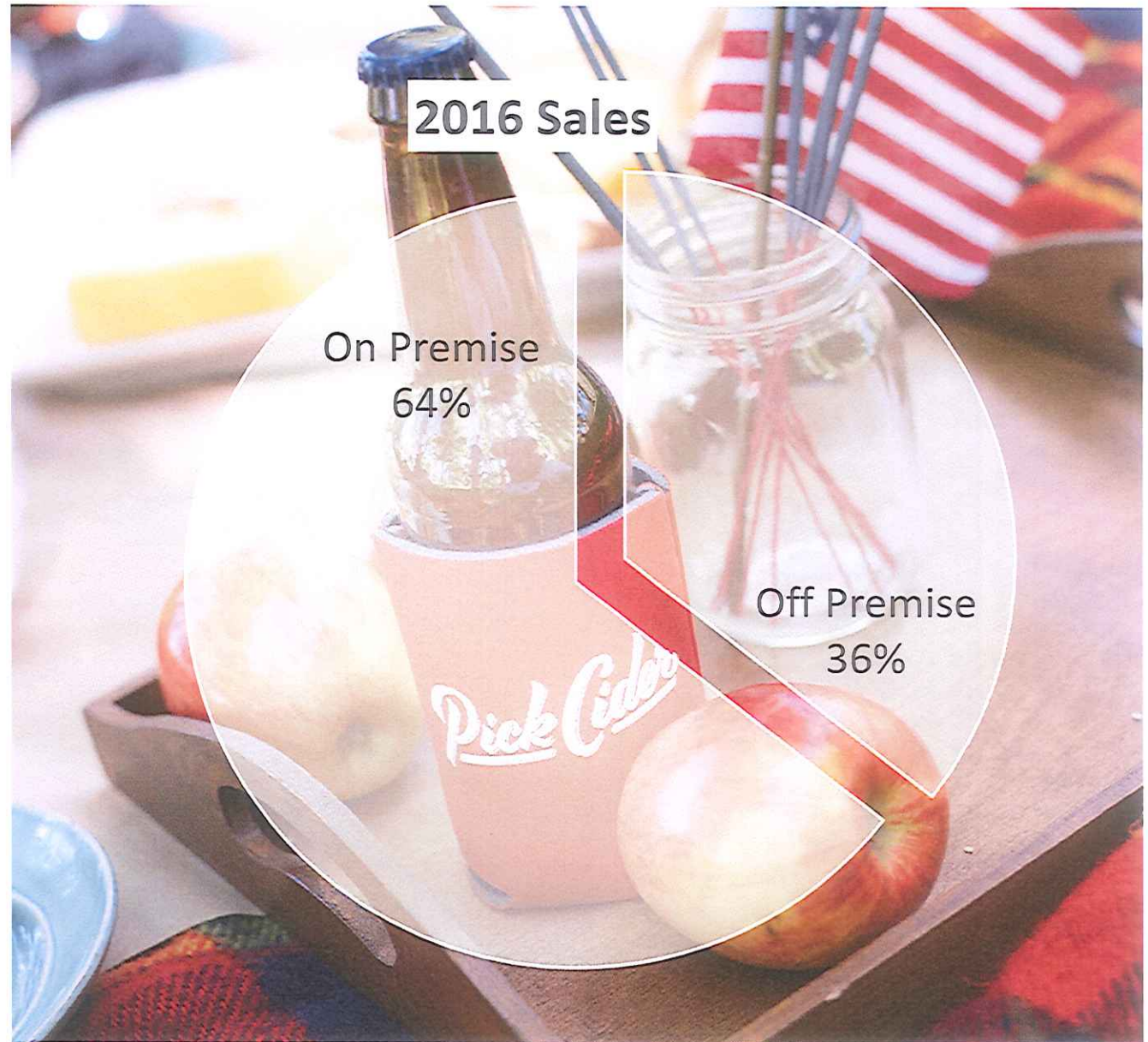
- 820 producers in the U.S.
- There were ~400 producers in 2014
- Still growing



# Market Status



- Cider = \$1.3BB (2016)
- ↑473% since 2011
- 1.3% as big as beer
- 25% regional & local cider / 75% national beer-owned brands





# Off - Premise



12/30/2016 - 12/30/2017

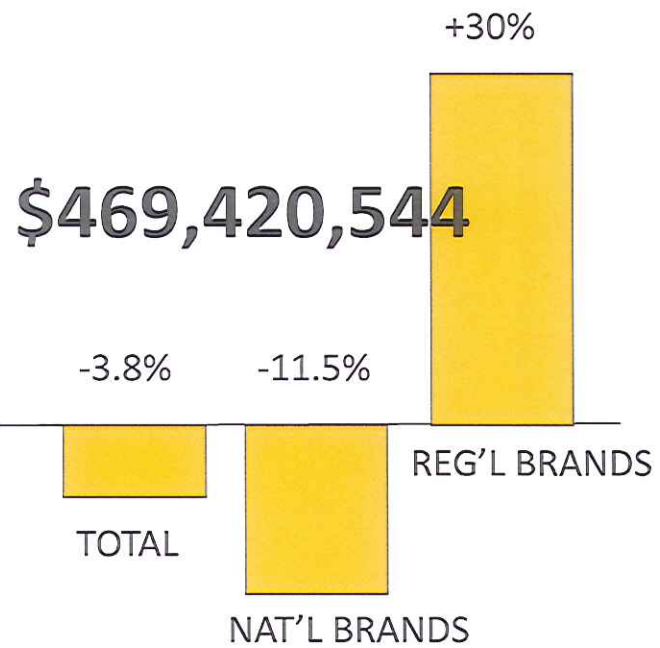


Photo by Jen Jones | Moxxy, Intl



These numbers are for OFF-PREMISE sales. They are from Nielsen, LLC

# On – Premise Sales

9/30/16 – 9/30/17



**Total Cider**  
**-4.6%**



**Apple -5.6%**



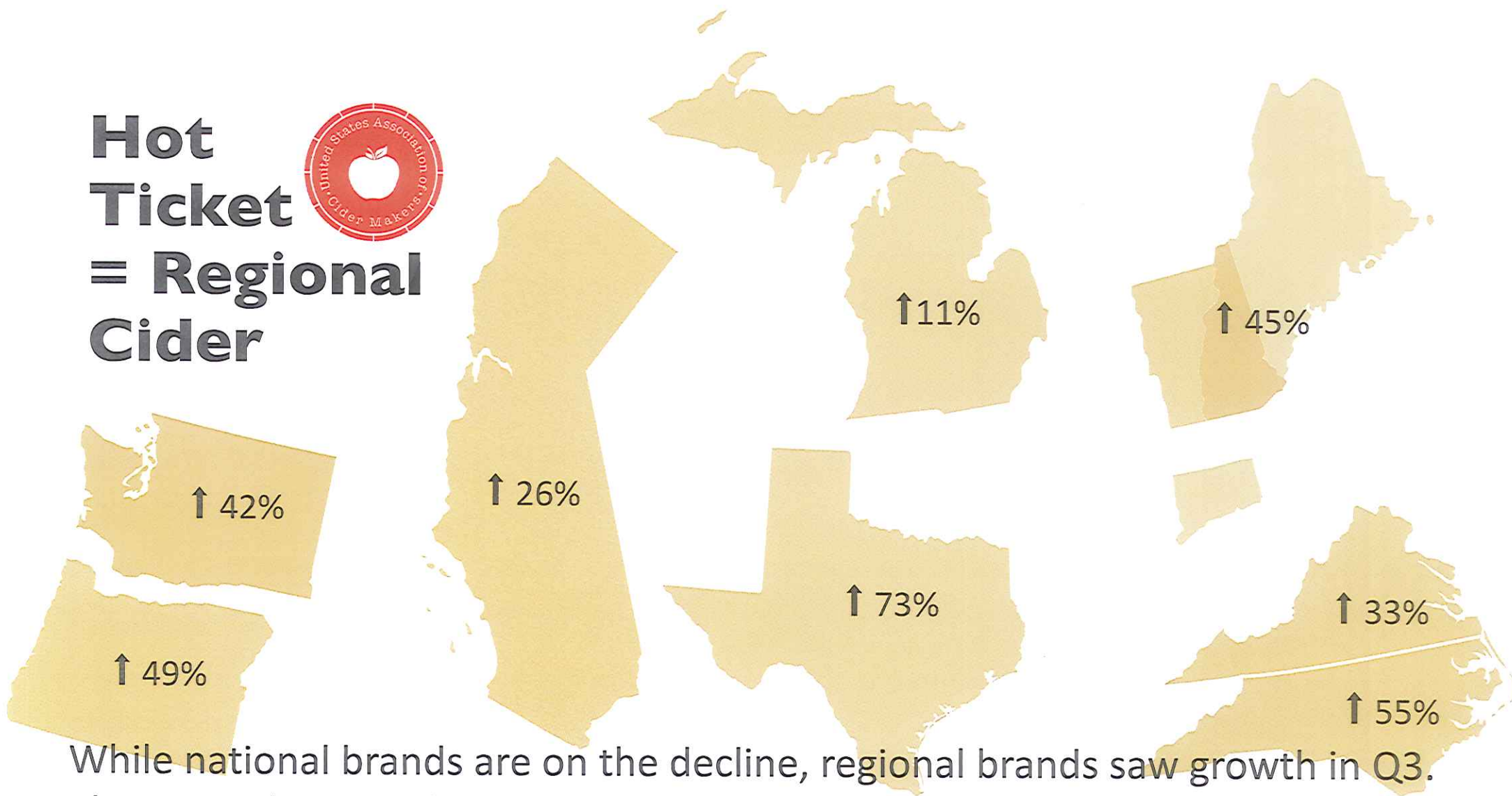
**Pear -9.7%**



**Fruit & others**  
**-1.0%**

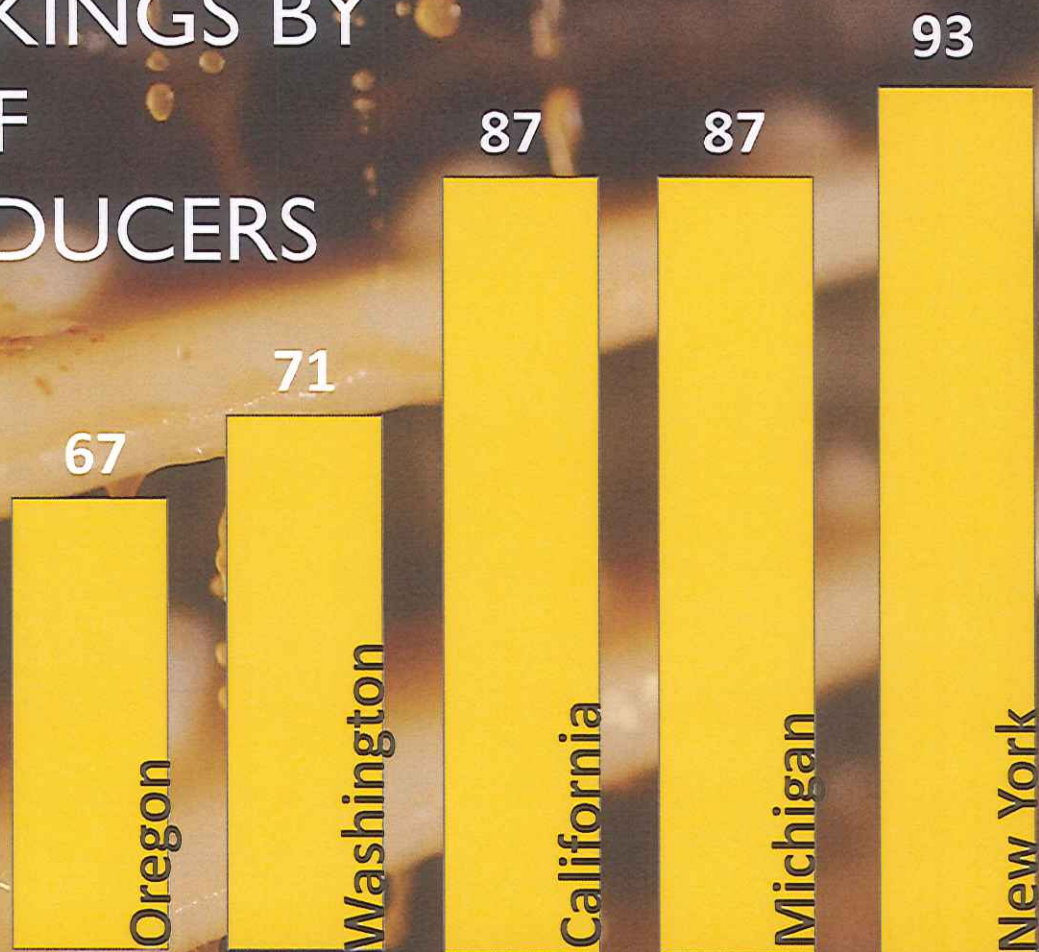


# Hot Ticket = Regional Cider



While national brands are on the decline, regional brands saw growth in Q3. These numbers are for OFF-PREMISE sales. They are from Nielsen, LLC.

# STATE RANKINGS BY NUMBER OF CIDER PRODUCERS



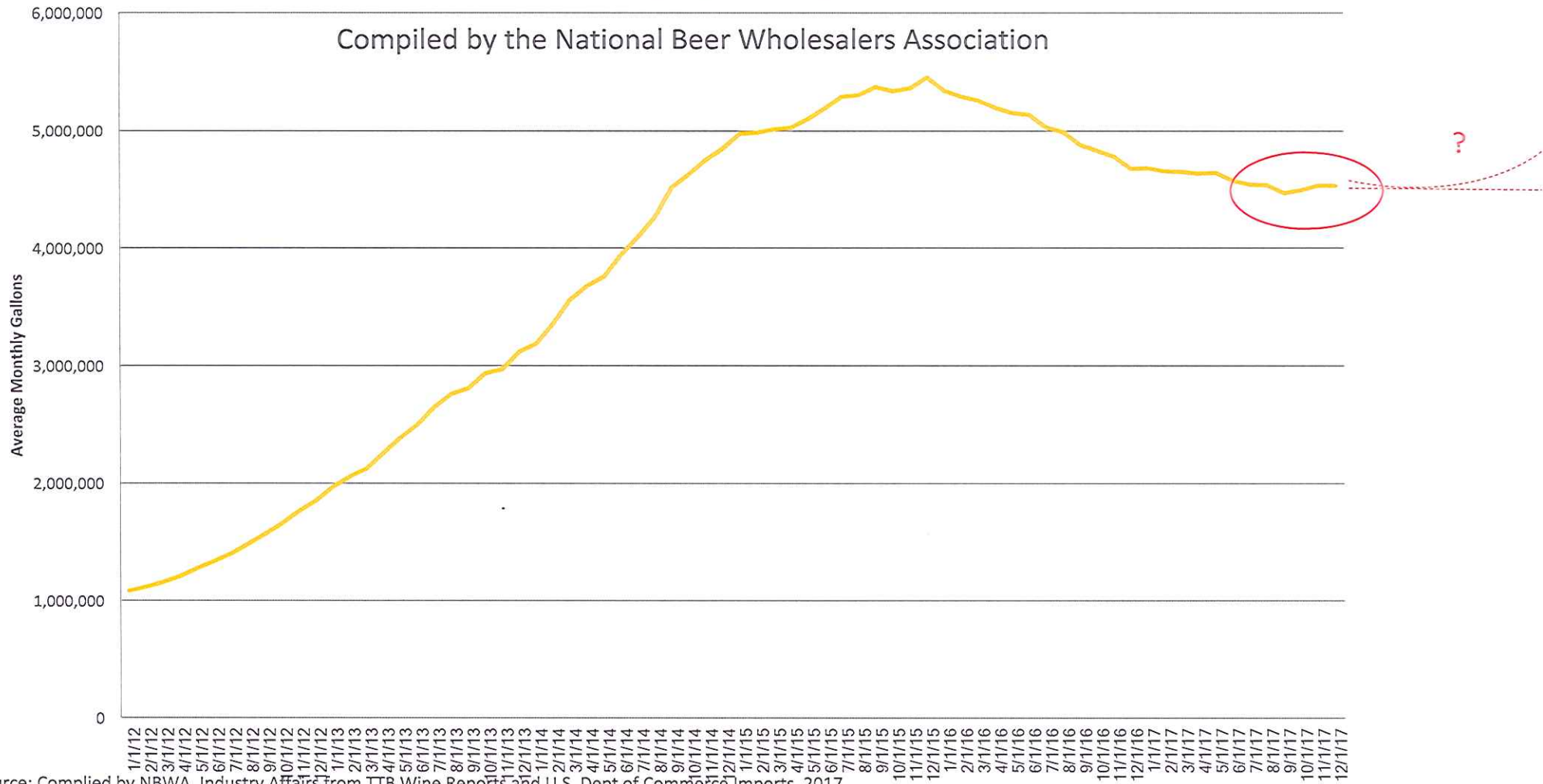
This is from a 2017 independent survey by Cyder Market LLC



SUPPLY

## Total U.S. Cider Supply Volumes - (Domestic + Imports) 12 Month Moving Average January 2012 - December 2017

Compiled by the National Beer Wholesalers Association



Source: Compiled by NBWA, Industry Affairs from TTW Wine Reports and U.S. Dept of Commerce Imports, 2017.



# Apple Prices

- Juice grade culls (dessert)-  
\$0.05/ lbs
- Orchard run dessert- \$0.20/ lbs
- Heirlooms- \$0.25/lbs
- Bittersweet/bittersharps-  
\$0.45/lbs

Photo: Eric Lewandowski



# NATIONAL CIDER TRENDS



Cans are  
increasingly  
Popular +12%  
10/16-10/17

Low- & High-Alcohol  
By-Volume ciders  
are increasingly  
popular

Fruit ciders continue  
to increase: 50%+  
among local/regional  
brands since last year



# US Cider Consumer

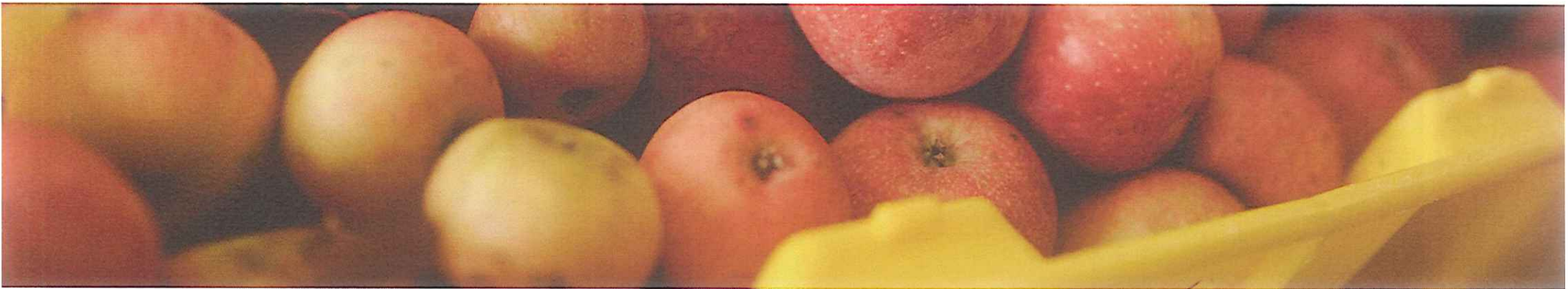


- 50/50 Male/Female
- Beer is closer to 70/30 M/F
- Under 44 years old, greatest consumer rates among 21-34 year olds



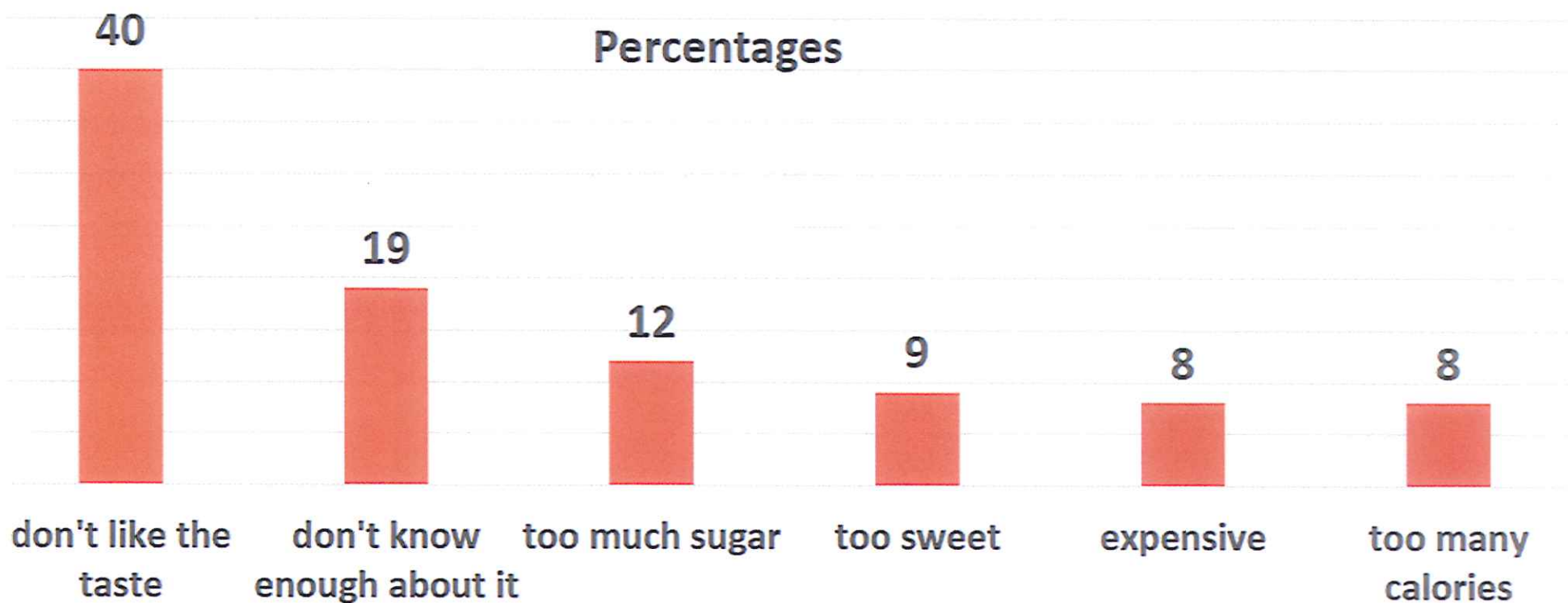
# Consumer Survey

- **10%** of respondents were drinking cider **several times a month**
- **33%** of consumers who drink cider “several times a year or more” reported an **increase** in their cider purchases
- When asked without a tasting panel, consumers stated that they **prefer semi-sweet ciders**





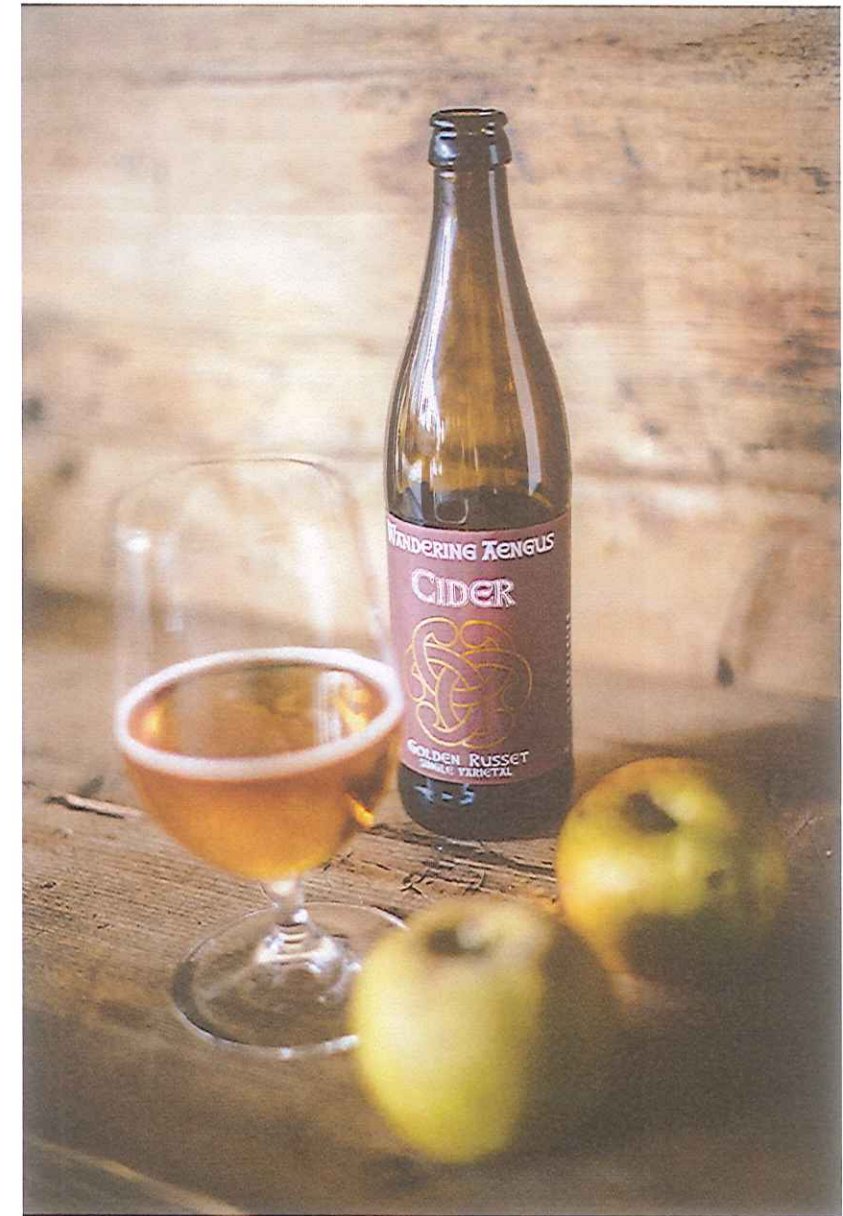
# Why don't you drink cider?



# What We Know



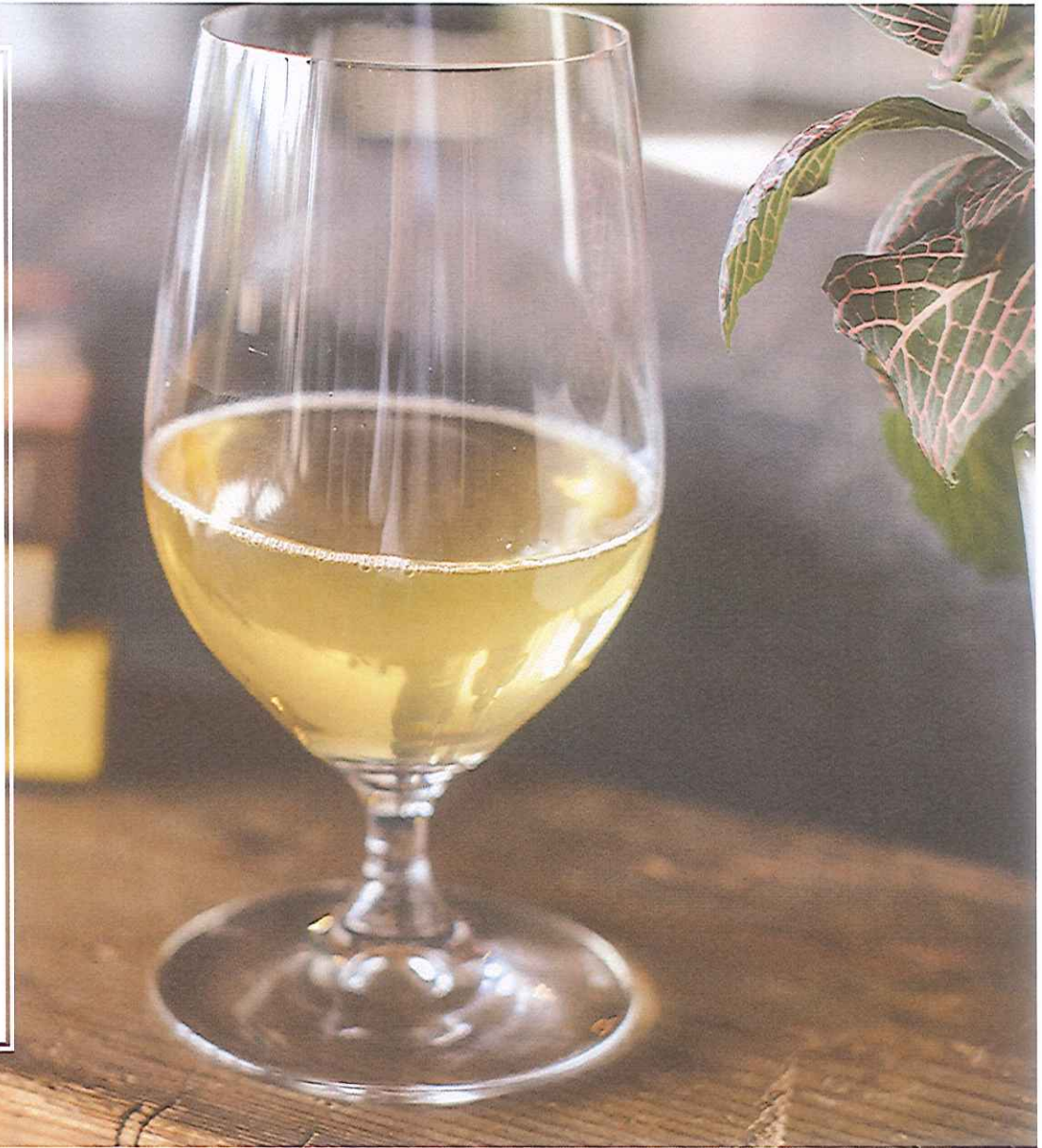
- Majority of US Cider is made from purchased juice rather than pressed apples
- Cider apples are prohibitively expensive in the US
- The consumer does not value cider apples as they do wine grapes
- At least 20% of cider makers are using some cider fruit





## **What we don't know**

- Cider varieties grown in US
- Acres committed to cider varieties
- Percentage of cider made using cider apples
- How to grow cider varieties in US (particularly French & English varieties)





# United States Association of Cider Makers

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Cider Style Guide Version 1.1





## Standard Styles

Modern Cider  
Heritage Cider  
Modern Perry  
Heritage Perry

## Specialty Styles

Fruit Cider  
Spiced Cider  
Hopped Cider  
Wood-aged Cider  
Sour Cider  
Ice Cider



**Modern Ciders** are made primarily from culinary/table apples. Compared to other Standard styles, these ciders are generally lower in tannins and higher in acidity.

**Heritage Ciders** are made primarily from multi-use or cider-specific bittersweet/bittersharp apples, heirloom varieties; wild or crab apples are sometimes used for acidity/tannin balance. These ciders will generally be higher in tannins than Modern Ciders.







# *the* CIDER Act



*Carbonation*

Still Wine Tax Classes (0.392g CO <sub>2</sub> /100mL or less)	Per wine gallon
• 14% alcohol by volume and under	\$1.07
• Over 14 - 21% alcohol by volume	\$1.57
• Over 21 - 24% alcohol by volume	\$3.15
Artificially Carbonated Wine Tax Class	\$3.30
Sparkling Wine Tax Class	\$3.40
Hard Cider Tax Class	22.6¢



*Pears*



*Alcohol  
by Volume*





QUESTIONS?

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CIDERASSOCIATION.ORG