



# WESTONS CIDER REPORT 2024





**HELEN THOMAS**, Managing Director of Westons Cider  
& 4th generation Weston family member

Welcome to the 9th edition of the Cider Report, our annual overview of Cider, looking back but also looking forward to the year ahead.

The Cider industry continues to evolve and while there remain challenges to the category and for the consumer, there are significant opportunities that can drive growth.

Looking forward, cider should not just rely on continued flavour innovations for growth, but should look to maximise the authentic and quality aspects of the products. You will see in the Report that apple Cider continues to be the significant share of Cider, and one where most opportunity lies.

As producers and suppliers, we need to ensure we are agile enough to respond to challenges and capitalise on the opportunities on where the market is headed. To that end, I hope the insights and trends highlighted in the Westons Cider Report support all to shape a growing Cider category.

Thanks for reading,

*Helen Thomas*



# WELCOME TO THE WESTONS CIDER REPORT 2024





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# THE CIDER EXPERTS



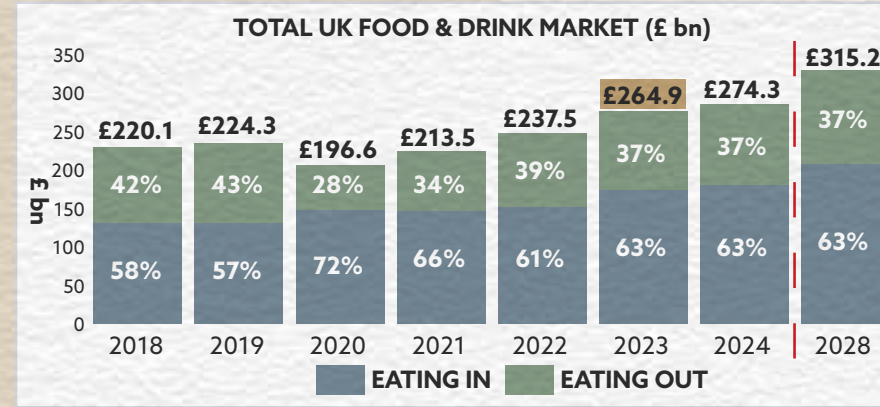
## UK FOOD & DRINK MARKET FORECAST FOR 2024

**NICOLA KNIGHT**  
INSIGHT MANAGER, IGD

2024 is set to be a critical year for the UK's food and drink industry. Businesses will be focused on margin recovery at a time of low economic growth and ongoing pressure on household incomes. Geo-political tensions, with conflicts in Ukraine and the Middle East, may well impact supply chains for food, energy and other vital commodities.

Many consumers will continue to be impacted by cost-of-living issues in 2024. Despite this, our recent consumer research indicates fewer are planning on cutting spend across a range of activities. This applies to eating and drinking out, with 47% planning to cut spend compared to 58% in October 2023. However, lower income consumers are significantly more likely to cut back discretionary spending (55% plan to cut spend on eating and drinking out compared to 44% of higher income households). IGD anticipates that confidence will continue to improve as more consumers believe the year ahead will be better for them financially than the previous year. However, we expect continued differences across income groups.

With pressure on consumer spend continuing, competition for "share of throat" between retailers and operators will be intense. IGD's Total Consumption Forecast predicts that retail (eating and drinking in) will maintain its share of the total food and drink market in 2024 at 63% vs 37% for eating out. Pre-pandemic eating out had a 43% share but pressure on disposable incomes amid rising business costs has dampened recovery. Overall, the market is predicted to grow by 3.5% vs 2023 to reach £264.9bn, although this will predominantly be driven by inflation (0.8% growth in real terms).



However, opportunities still exist. 2024 is set to be a key year for big events, ranging from the Paris Olympics to the Euro 2024 football tournament. Manufacturers and retailers have an opportunity to encourage trade-up and impulse purchasing whilst operators can use these events to create a reason to visit. Whether watching in- or out-of-home it will be important for food and drink businesses across all channels to provide excitement and inspiration to consumers.

### PUBS & BARS

The overall pub market is shrinking in terms of sites, primarily independents and tenanted/leased sites. Managed sites are in growth and there will be opportunities for the larger operators to snap up real estate from the closures, but ultimately, the total pub estate will still be significantly smaller than it was five years ago. In the current climate, the pub sector is performing better than the overall hospitality market as a visit here can be of a lower cost to consumers than a visit to a restaurant. Snacking and sharing dishes are proving popular as are more drink-only occasions.

### RESTAURANTS

Full-service restaurants have struggled the most during 2023. In particular, the middle market is suffering and we predict that this will continue. Independent sites are especially vulnerable to the impact of rising costs and lower footfall driven by the cost-of-living crisis. The polarisation between value/cheaper/quicker fast-food and high quality, experience-led dining will continue and potentially amplify, leaving the casual dining market in a sticky situation. We expect group operators to diversify their offering to meet these needs and we are already seeing this play out with the likes of Prezzo announcing that they are going to be launching a new takeaway pasta and pizza slice concept called "Prezzo Pronto", and Zizzi's launch of a frozen retail range in Morrisons.

### CLUBS/COMPETITIVE SOCIALISING

Gen Z socialise differently to previous generations, from online dating replacing the need to go out and meet someone organically to a reduced trend for binge drinking. They want experiences they can't get at home or online. The rise in competitive socialising, market halls and leisure-tainment will continue to grow to meet the needs of this demographic. The popularity of these types of immersive activities are also being picked up by pub groups and more hybrid food, drink and leisure formats are likely to emerge.

## ON-TRADE OUTLOOK FOR 2024

On-trade demand in 2024 is expected to benefit from strengthening inbound tourism and a slight improvement in economic conditions for some UK households. Overall, however, trading is expected to remain very difficult for the time being. Many managers in the industry will remain focused on hitting their financial targets, dining occasions, transaction values, margin and so on, whilst grappling with rising labour costs and attracting and retaining talent.

Longer-term, the UK On Trade market still offers huge potential. Business foundings in the foodservice sector continue and new outlets are appearing. This shows that confidence in the market is still high, for business operators and their backers. Business leaders need to prepare for the future and, with "full-expensing" (allowing companies to write off the cost of investment in one go) in place until March 2026, now could be the right time to make bold investments.







## CHLOE GBADERO

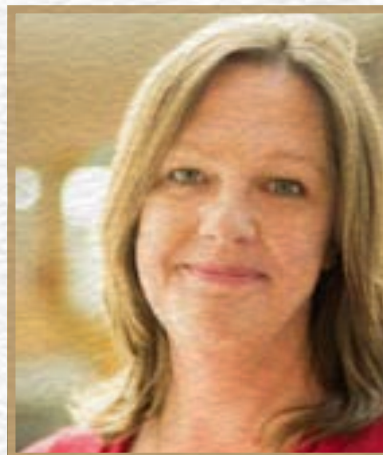
CLIENT MANAGER, KANTAR

Across the Alcohol industry, we are seeing that On Trade consumption moments have not fully rebounded to the levels witnessed in 2019. However, it is worth noting that the On Trade has been demonstrating a steady recovery back to 2019 levels, a trend expected to persist well into 2024. In contrast, despite Off Trade consumption occasions excelling throughout the pandemic, the channel has now dropped below pre-pandemic levels as drinkers want to maintain their more special occasions out of the home.

Furthermore, there is a noticeable shift in the share of spending within the Total Alcohol Off Trade market, revealing a growing preference towards private label beverages. This trend is particularly propelled by key retailers such as Asda, Sainsbury's and Aldi. The shift towards private label is largely attributed to the ongoing cost of living crisis, compelling consumers to seek more cost-effective alternatives and prioritise their expenditures accordingly.

It is also worth noting that where Cider is concerned, private label growth is primarily driven by hard discounter growth, which demonstrated an impressive year-on-year increase of 12%. This further emphasises the demand for budget-friendly substitutes.

To increase consumer and shopper engagement amid the growing prevalence of private label, it remains a crucial point that brands emphasise their unique selling points and qualities to stand out within the market. Shoppers are continuously seeking out brands that differentiate themselves from their competitors, whether that's through the quality of their products, intriguing flavours, rich heritage and so forth. Subsequently, it becomes important that brands highlight their unique propositions. We have found that without differentiation, shoppers are more likely to prioritise more cost-effective alternatives.



## FENELLA TYLER

CHIEF EXECUTIVE NATIONAL ASSOCIATION OF CIDER MAKERS

2024 will be a year of change politically, with a much anticipated General Election. For Cider makers, it will be a year of adapting to the new excise duty rules that were implemented under the Alcohol Duty Reforms. The changes in how duty is applied will, over time, change the shape of the Cider category, perhaps seeing an increase in focus for lower alcohol Ciders. On the horizon are opportunities for both Cider makers and apple growers, as DEFRA continues to review post-Brexit policy around agriculture, biodiversity, tourism and cultural heritage. This creates the perfect time for Cider to be recognised as the quintessentially British drink, made and celebrated for centuries. Government focus continues to be on lower alcohol innovation and low/no drinks. This is a part of the category that Cider excels at, so an important part of the range for every Cider stockist.



## CHRIS STERLING

CLIENT DIRECTOR, CGA

There is no doubt one of the key trends for 2023 was the consumer's continued move towards experiential venues and we continue to see expansion in this channel. As consumers become ever more savvy, value and experience are key in decision making. However, value doesn't mean cheap; suppliers and operators can capitalise on premium products by increasing their value perception through enhanced experiences.

There is no doubt, with consumers seeking experience and value, that the Cider category

needs to focus on innovation and NPD to provide an enhanced experience. This can be a combination of being in the right venues but also inventive serves and activations tapping into social media.

The sporting occasion still holds an important position within the On Trade, as we saw with the Rugby World Cup, which saw LAD as one of the major winners. This summer sees the first Euros since the heavily regulated 2020 Euros which represents a real opportunity for the Cider category.

Subcategories at the premium end of the pricing ladder such as World Beer, Stout and Craft are all performing well, highlighting the appeal of aspirational and premium products for consumers. This is driven by the treat occasion; with so much doom and gloom in the news the treat occasion offered by the On Trade is a welcome escape and is still the number one indulgence sought by consumers. Cider brands can have a positive impact on the category's performance this summer by focusing on the treat occasion.





### GABE COOK THE CIDEROLOGIST

Cider's great joy, its greatest attribute, is its ability to appeal to so many different types of drinker. There are so many different interpretations of the fermented apple – still or sparkling, bottle at the BBQ or pint down the pub, tropical fruit or citrus fruit flavoured. There really is a Cider for everyone.

But, almost exclusively, all of the 'innovation' within Cider over the last decade has come from an endless stream

of different flavours, which one could easily argue doesn't actually count as being particularly innovative! I'm a big believer that the next wave of innovation and volume/value growth opportunity goes back to where it all starts – classic apple.

There is huge scope for being playful and innovative in this space, such a focus on specific apple varieties, just like grape varieties with wine or hops in Beer. Let's get Dabinett as well known as Sauvignon Blanc or Cascade. How about the creation of Ciders that are genuinely, and naturally, low sugar (aka dry Cider!). Or even Ciders that present a little more like a wine – big bottle, big flavour, big experience.

There are tens of thousands of acres of apples grown in the UK for the sole purpose of making Cider. There is a heritage of making Cider on these isles going back a millennia. Apple Cider is the real and the original. As consumers seek greater provenance and authenticity in their drinks, the application of NPD budgets and innovative thinking into the Cider category would be wisely spent on how to use its greatest asset – good old apples.



“ THERE ARE SO MANY DIFFERENT INTERPRETATIONS OF THE FERMENTED APPLE – STILL OR SPARKLING, BOTTLE AT THE BBQ OR PINT DOWN THE PUB, TROPICAL FRUIT OR CITRUS FRUIT FLAVOURED. THERE REALLY IS A CIDER FOR EVERYONE. ”



### JACK STREET CIRCANA

The UK's love affair with booze continues. The increase due to inflation for alcoholic beverages continues to be lower than the FMCG average. RTDs and Beer lead the increases within the category, with Beer and Cider combining to make up 81% of the growth within the industry.

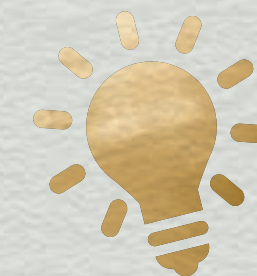
**Beer Battles:** While still the king of the pub, Beer faces a fight for its crown. Sales are holding steady with price increases, but volume is on the decline, particularly amongst younger generations. Craft Beers keep things interesting, with a 4% growth, while the demand for no/low alcohol options is skyrocketing, up a staggering 40% on last year.

Despite not having a major share, Cider should not be underestimated. Driven by consumers seeking lower alcohol options and the rise of craft Ciders with unique flavours, the category is experiencing a 2% growth in share. This gluten-free beverage is finding favour with a wider audience. Cider would benefit from a wider range of flavours, as variety packs of hard seltzers are performing well in all formats.

**Market Shakeup:** Just like mixing a cocktail, the industry itself is undergoing some major consolidation. Larger companies are acquiring smaller players to gain market share and diversify their portfolios. RTD Cocktails and Seltzers, both in variety packs, are performing well with a 38% growth on last year.

**Prime Time Promo:** With HFSS products being banned from gondola end and other promotions, this is an opportune time for alcoholic drinks to strike and promote their products in optimal real estate in supermarkets.

**Football Fever:** Historically, football tournament summers have seen huge spikes in volume sales for both on and Off Trade purchases. With the European championships just around the corner this summer, we can expect the trend to continue, and Cider should fight hard for shelf space going into the summer with greater promotional opportunities due to HFSS restrictions.





# CIDER INDUSTRY HEADLINES



In total, across 2023, the UK purchased just over  
**695 MILLION LITRES OF CIDER**  
a decrease in volume of -2.62% compared with 2022



The value of the total Cider category in the UK is  
**£3.06 BILLION**  
which is an increase in last year's figure in the Cider Report

## OFF TRADE VS ON TRADE

The On Trade now accounts for 62% of value and 37% of volume. As we reported last year, this is expected to stay broadly the same in terms of split, and back to normal since the pandemic. However, the minor moves in percentages, although small, are signals of the broader consumer drinking trends and price increases. Value split in Off Trade has increased by 1% - we have seen prices increase in the past year coupled with shoppers buying less.

### CIDER VALUE SHARE



### CIDER VOLUME SHARE





# GROWTH OPPORTUNITIES

## APPLE SIGNPOSTS QUALITY

In this year's report you will see that growth in both the on and the Off Trade has been achieved by the apple subcategories and brands, and we fully expect this to continue. Premiumisation continues to be a key consumer Cider trend, with drinkers trading up to more expensive products. It has been a long-term Cider trend (not just inflation-related, as seen recently) and, with it, the quality bench has become even more important to ensure consumers are perceiving the true value for money. Consumers are seeking out the brands that echo this quality, and it's the apple brands that are delivering on this through heritage, provenance and the authentic nature of crafted and cared-for apple Cider.



## RANGE & SPACE ARE KEY

In both channels of trade, with the crafted and premium apple categories gaining share, it's important that ranges adapt to where the growth is coming from and match this. Getting the Cider range right and ensuring the best-selling brands

are in front of the consumer is key. The best-selling brands need to be given prominent tap positions and within the Off Trade, key sellers given enough space to keep them in stock. There is more return and upside for outlets that can sell more of the brands that can command the higher prices, so this key to profit and health of their categories.



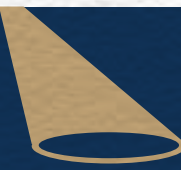
## DISTRIBUTION GAINS

It's often thought that to achieve growth we need to invest significantly more or launch new brands to appeal to the 'ever changing consumer'. In truth, it's not that complex. The Cider consumer over time hasn't changed too much, and there is more of that later in the Report. To grow in 2024, Cider needs to simply seize and make the most of the big occasions and Cider moments. The category needs to execute the basics well, when the unpredictable weather brings those moments to the fore. Ensuring distribution of the most relevant brands in both channels of trade is key, whether the purchase decision is planned or not. It sounds simple, but it's where share of wallet is lost to other categories such as Beer, which could be more readily available.





# CATEGORY SPOTLIGHTS



## ATTRACTING NEW DRINKERS

The Cider category must continue to attract and recruit new drinkers. Although fairly successful at this in general, consumers are often light and promiscuous to other drinks categories. Driving trial for the best-performing segments in premium and craft Ciders is key, but evidence shows that younger drinkers are finding these more premium brands and drinking them. New flavours in recent times seem to be short-lived, with Dark Berry flavour being the consistent long-term fixture, now ten years old as a category. Apple is the biggest segment, and showing growth, so this remains a big opportunity for attracting new drinkers. Often, drinkers first discover brands in the On Trade; for younger drinkers this tends to be Cider. CGA report that younger demographics overindex for Cider. Three in Ten (30%) of those aged 25-34 now drink On Premise, more than any other age group, and a third of the Cider consumers drink out at least weekly and spend £5 more than the average of £101 a month – so Cider is recruiting and delivering new younger and affluent drinkers.



**82% OF LANDLORDS, MANAGERS & OWNERS THINK ON TRADE LIVE SPORTS VIEWERS WOULD GO ELSEWHERE IF THEY STOPPED SHOWING LIVE SPORT**

## CIDER & SPORT

In previous Cider Reports, we've always looked at what drives the biggest Cider occasions and days, and it's key that both channels of trade understand these, so they can take advantage. Some of the biggest Cider days are linked to sport. Year on year, some of our key domestic sports have significant reach of consumers and are huge Cider occasions. They either draw drinkers to the On Trade or have a reason to celebrate at home. Regularly, events such as the FA Cup and Grand National have shown up in the top 10 Cider occasions, mixed in with the summer bank holidays. However, this year, we have the Euros, with England and Scotland already qualified, hopefully Wales can get over the line to qualify to ensure a buoyant national following. The tournament is from mid-June to mid-July, and this coupled with the summer, always leads to significant Cider days, as the sun shines, and even the lightest of supporters get drawn into the football. The Euros will definitely contribute to Cider having a significantly positive summer in 2024. The Olympics are also on – they gain the nation's focus, but nothing like a decent international football tournament!



## SEASONALITY & TEMPERATURE

We often discuss the seasonality of Cider, and how the summer is key to consumers seeking refreshment look to Cider. Last summer, we saw a clear example of this working in the opposite way, as temperatures, coupled with rain in July and August, had an adverse effect on sales. When comparing average temperatures, in both months, the average temperature was over 2 degrees less than the same months in 2022. The knock-on effect, when we look at the Off Trade sales, shows clear declines year-on-year in these months. Therefore, Cider is seasonal in relation to warmer weather and not just summertime. And while Cider does steal share in the summer, consumers certainly don't disappear in the winter, and this too is an opportunity. With two thirds of the volume of Cider being purchased in the Off Trade, the December big shops contain Cider, often choosing bigger case sizes, and often trading up for the special occasions to push the boat out with spend. Premium and Crafted Cider SKUs often see December as one of the biggest sales months, second only to a hot July month.



# CIDER OCCASIONS

The biggest Cider drinking occasion differs between the On and Off Trade. In the Off Trade, the number one occasion at 19.1% of serves is a quiet night in, this is a decrease from the 20.7% seen last year. This channel is becoming higher tempo, with planned social occasions gaining 1.3 share points from 10.5% to 11.8%. In the On Trade, the biggest drinking occasion is a sociable get together at 17.6% of serves. Special celebration and family celebration have also both gained share points.

Food is key to the Cider drinking experience with 48.3% of On Trade serves being with food, and 71.9% for the Off Trade. In both cases this is an increase versus last year. The biggest increase in the On Trade has been for a sandwich/baguette/ panini which is now 11.6% of serves. The Off Trade has seen an increase in formal meals and dinner parties.

In both channels most Cider serves are on a Saturday, this has decreased slightly compared to last year but in both cases almost 30% of serves are on this day of the week. Sundays have become more popular with a 0.7ppt gain in the Off Trade and 1.5ppts in the On Trade.

The most common time of day to drink Cider is weekend evening with 36.1% of serves in the On Trade and 41.0% in the Off Trade. In both channels weekday evening and Sunday evening have increased year-on-year.





# MARKET CONTEXT



## SUSTAINABILITY

Cider's sustainability credentials remain key in the consumers mind and the category should look to emphasise this wherever possible. Sustainability can be more than just a nice-to-have and can actually act as purchase driver for Cider. The Mintel Report shows that Ciders with environmental certifications are held to be more appealing than those without, by 45% of drinkers. While some brands do reference some sort of greener angle or initiative, it could be argued that it's a missed opportunity for the wider category. Communicating on-pack the environmental credentials, with relevant certifications would help catch shoppers' attentions and could easily prompt a purchase ahead of other brands and categories. Brands that are able to demonstrate a commitment to sustainability throughout an entire product's lifecycle including the use of local apples, efficient modern production methods and packaging from recycled materials, are likely to appeal to more consumers. The UK remains by far the largest producer and consumer of Cider, and so it is a 'local' category compared to some of the myriad of products and categories that have significant air miles, so Cider is a more natural green choice.



## LOW & NO

Across the Off Trade, total alcohol has had another positive year, with an increase in shoppers driving the growth, as consumers become increasingly interested in moderating. Total No & Low Alcohol is up +£23.8 million, +3.2%. Within Cider, there remains opportunity. In comparison, actual spend within No and Low Cider, was up +£2.4 million, + 8.4%, driven by new shoppers (+4.4%) and frequency (+2%).



**CHLOE GBADERO**  
CLIENT MANAGER, KANTAR

Within the Cider category, a noted trend that we are seeing is that alcohol-free variants are experiencing the most short- and long-term growth. The growing popularity within the alcohol-free Cider category aligns seamlessly with broader consumer trends towards a healthier lifestyle. Notably, 27% of Cider drinkers mentioned that they are looking to moderate their consumption. Factors such as increased awareness of the impact of alcohol on health, a desire for more mindful drinking, and the importance of overall well-being have encouraged a shift towards moderation, thus contributing significantly to the growth of alcohol-free options.

This positive trend holds great potential for the Cider category, particularly as the movement towards moderating alcohol consumption gains traction across all age groups. The appeal of alcohol-free options extends to the average Cider shopper and consumer, making it a noteworthy and beneficial development for the category.







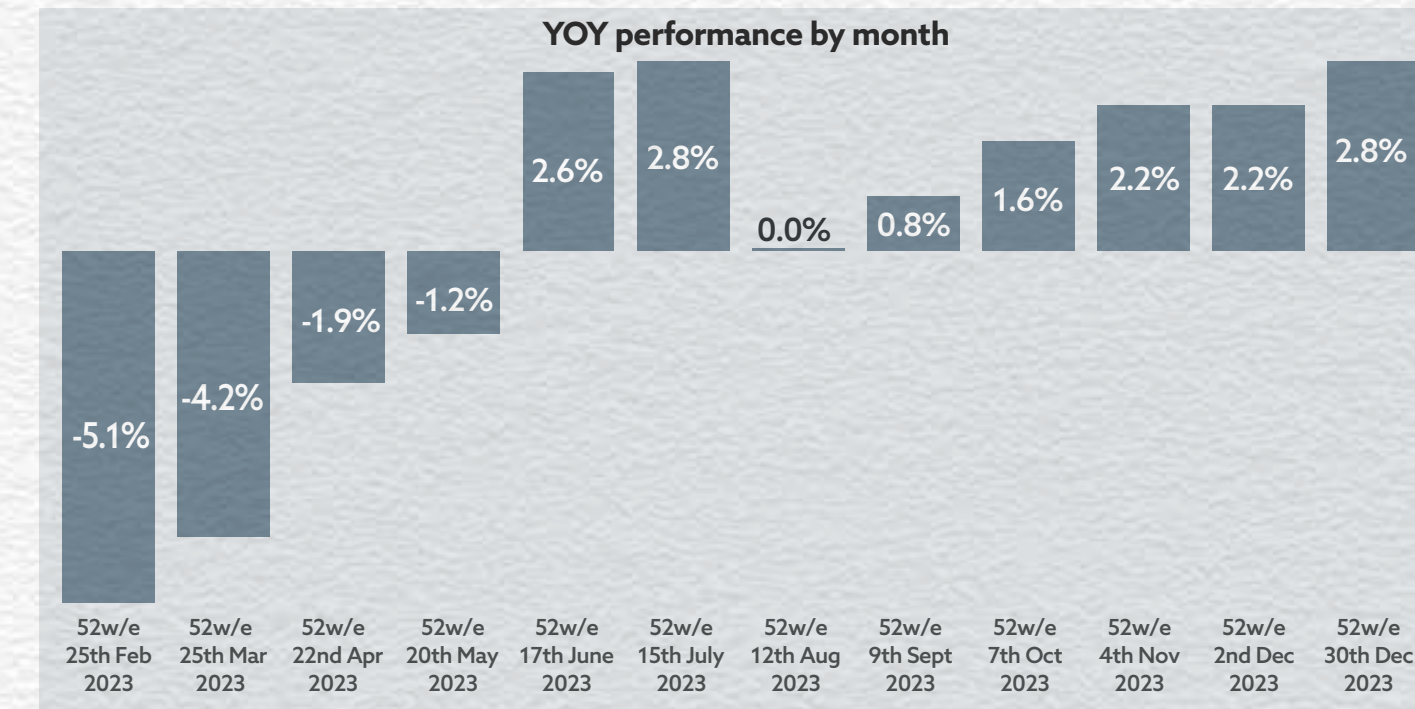
# OFF TRADE MARKETPLACE

There are four key dynamics to discuss in this section, which have characterised the Off Trade Cider market this year:

- #1** The summer was cooler and wetter in 2023, leading to a summer slowdown in sales.
- #2** Average price per litre has risen so we continue to see value growing while volume declines.
- #3** The continued growth of Cider's top tier, the crafted Cider segment.
- #4** Apple Cider continuing to outperform flavoured Cider.

# OFF TRADE

In August 2023 average temperature was 16.2 degrees, compared to 18.3 degrees the previous year. This temporarily put the brakes on value growth before recovering in September. The likelihood is that the poor weather meant consumers were not drinking in the garden, socialising outdoors, hosting etc. With Euro 2024 to look forward to this summer, a warm summer could lead to big year-on-year comparisons vs 2023.



One of the biggest changes this year has been in price per litre. This went from £2.32 two years ago, to £2.38 last year and now the average is £2.55. Some of this increase will be linked to inflation but there will also be some element coming from trading up in the market with shoppers buying better quality Ciders.

The highest quality Cider segment is crafted. This consists of heritage and traditional Ciders, often with apples from a single year's harvest and produced from an independent or family company. Share of crafted Cider increased from 19.4% a year ago to 21.2% of market value. Strong year-on-year growth of 12.2% has further increased the crafted segment's foothold in the category.

Apple Cider makes up 64.1% of Cider category spend, up from 62.4% last year. Growth of 5.6% has meant apple has won share from flavoured Cider which now makes up 31.5% of category value.



# OFF TRADE STOCKING RECOMMENDATIONS



## RECOMMENDED CONVENIENCE CIDER FIXTURE FOR A 2.5 METRE REFRIGERATED UNIT

The obvious challenge for convenience vs supermarkets is the limited fixture space. One way to alleviate pressure on in-demand refrigerated space is to place single bottles for impulse shopping occasions in the fridge and then utilise ambient fixture space and stacks for larger packs.

The crafted segment is performing well in convenience as well as in total market and there is still headroom to grow, so needs priority space in fridge to maximise sales. This segment makes up 18% of value in the convenience channel, compared with 21% in total market. Distribution of crafted Cider is 94.5% across convenience, compared to 98.3% in total market. Matching market distribution in convenience could single-handedly give value sales a boost. Outlets should be stocking several crafted apple SKUs in sufficient facings to maintain stock. In terms of value, crafted averages £4.16 per litre in convenience compared to total Cider at £2.64 per litre, so can help grow revenue.

Apple should occupy approximately 2/3's of total space within cans (including single cans, pint cans, 4 packs). Apple in a glass bottle largely sits within the crafted segment and the consumer would expect some choice here also. Flavoured remains stable and the main flavoured brands should be stocked, in single bottle or 4 pack can. A citrus or tropical Cider could be included, but should not be over-spaced, while both a low alcohol apple and flavoured should always be stocked to cater to all shopper missions and ensure breadth of choice. Low and no alcohol Cider remains a small part of the category so does not require a lot of facings.

We see an unlimited variety of ranges across the convenience store sector, with some seemingly not being updated to reflect market changes. Space within convenience remains a premium, but this channel is key for Cider over and above other categories, so getting it right and updated to the latest consumer trends is important. It might be tempting to stock as many options as possible, but facings should be prioritised for



best sellers to make sure store staff are not constantly refilling and that key products do not go out of stock. There is no bigger limiter on Cider sales than empty shelves at key selling periods.

WINE	BOTTLED CRAFTED CIDERS	BEER	
WINE	PREMIUM BOTTLED, FLAVOURED & CAN CIDERS	LOW OR NO ALCOHOL CIDER	BEER
WINE	VALUE AMBER 2L	4 PACK CANNED APPLE & FLAVOURED CIDER	BEER
WINE	LARGE PACK MAINSTREAM - APPLE & FLAVOURED CIDER	CRAFTED MULTIPACKS	BEER



# OFF TRADE STOCKING RECOMMENDATIONS



## RECOMMENDED FOUR BAY SUPERMARKET CIDER FIXTURE

In recent years, in-store space dedicated to Cider has shrunk in some retailers which makes working the space as hard as possible even more important. It is critical that the best-selling brands are given the right amount of space and facings on shelf, to maximise returns per outlet. Keeping the brands in stock should take priority over endless choice of Cider.

Apple Cider remains the dominant Cider type, and this should be reflected in the ranging with approximately two thirds of the space. The most premium segment is crafted, and this is dominated by apple. It is key that this bottle-led range is right and should be over-faced to maximise sales. Leading crafted SKUs should be available in multipacks to cater to big shop missions and help maintain stock of the singles.

The main brands of fruit flavour Ciders should be stocked, with choice of flavours delivered with single bottles, and multipacks in the main flavours of Strawberry & Lime for example. There is a lower annual spend for flavoured Cider shoppers when compared to apple, so fewer facings can be allocated relative to apple SKUs as the flavoured Cider shopper is a less heavy buyer.

While there is more space than in convenience, duplication or near duplication should be avoided, to still ensure choice is given to the shopper, as well as enabling a fixture to flex to a specific distinctive retailer feel.

Can formats represent 60% of the market, so choice across 4 packs and 10 packs is essential. Bigger can packs can also be stacked away from the main fixture to free up space and also raise the profile of Cider in key footfall areas of the store.



For no and low alcohol, both low alcohol and zero options should be stocked with at least one apple and one flavoured variant. A mix of glass bottles and cans ensures choice for the shopper.

Value amber Cider accounts for less than 10% of Cider market share so should not take up too much of the fixture. Often there is very little difference in price per litre between the value offering and promoted mainstream products, so the role of value Cider as an entry level has become diluted, more so in minimum unit pricing areas.





# OFF TRADE

## SNAPSHOT

**THE CIDER MARKET IS WORTH £1.1bn, +2.8% YoY**



**440 million litres** of Cider were purchased, **-3.8% YoY**



The big 4 supermarkets account for **60% of all Cider sales**, down slightly from 61% a year ago (In the Cider market the big 4 is still Tesco, Asda, Sainsbury's and Morrisons)



The average price of Cider per litre is **£2.55**, up from £2.38 a year ago



**41.5%** of UK households buy Cider



Households in the UK purchase an average of **34.0 Litres of Cider per year**, up 2.5% compared to last year



The average household makes **10.8 shopping trips for Cider a year**

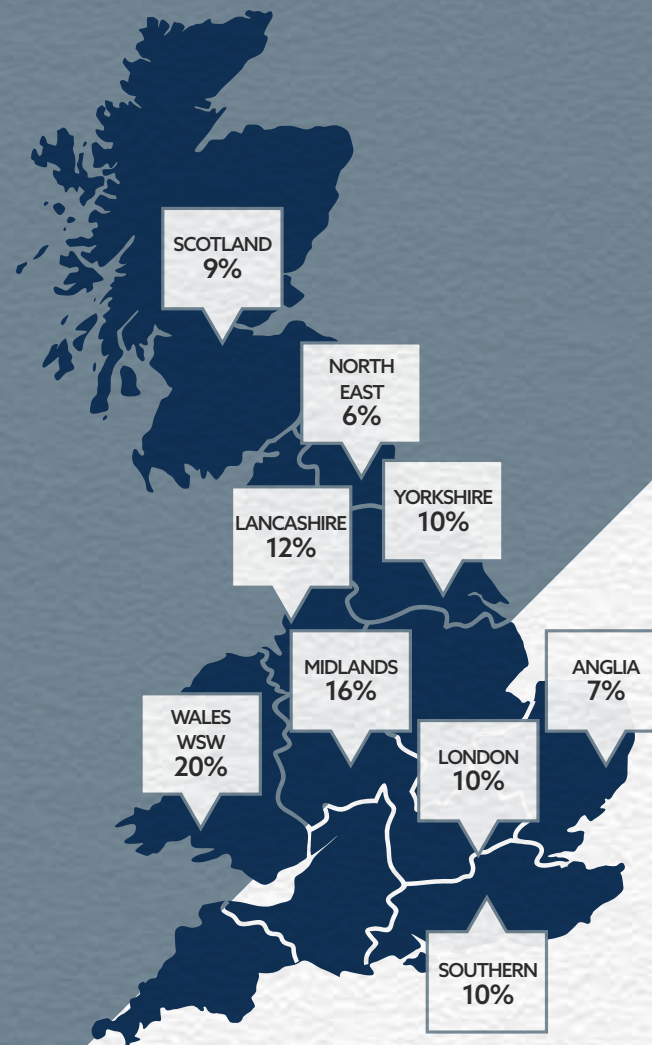


### Cider continues to have a **SOUTHERN BIAS**

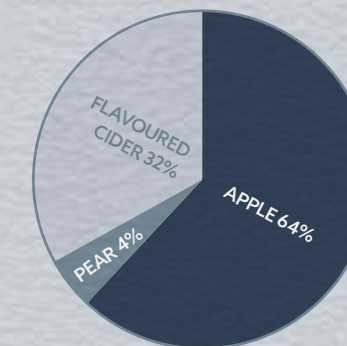
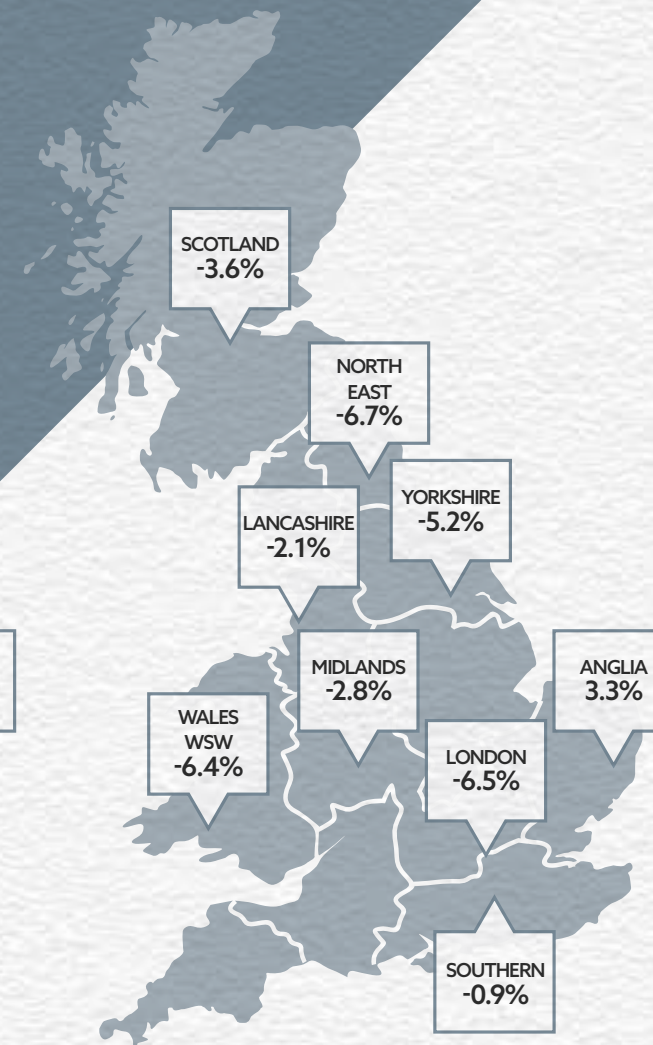
...with the 5 most southern TV regions making up 64% of Cider volume sold

...this is even higher for Crafted Cider with 74% of volume coming from the south

**% OF TOTAL VOLUME BY REGION**

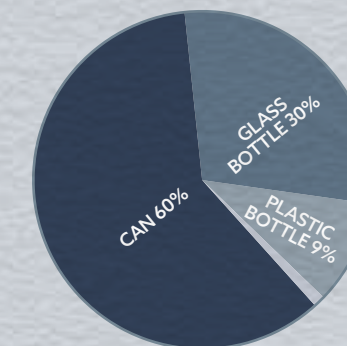


**VOLUME SALES % CHANGE VS YEAR AGO**



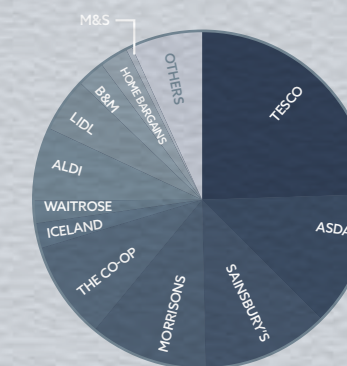
**CIDER VALUE BY FLAVOUR YOY**

Type	Share	Growth
Apple Cider	64%	+5.6%
Flavoured Cider	32%	-2.0%
Pear Cider	4%	-1.5%



**CIDER VALUE BY FORMAT YOY**

Type	Share	Growth
Can	60%	+3.0%
Glass Bottle	30%	+4.2%
Plastic Bottle	9%	-2.0%
Other Packaging	1%	-1.5%



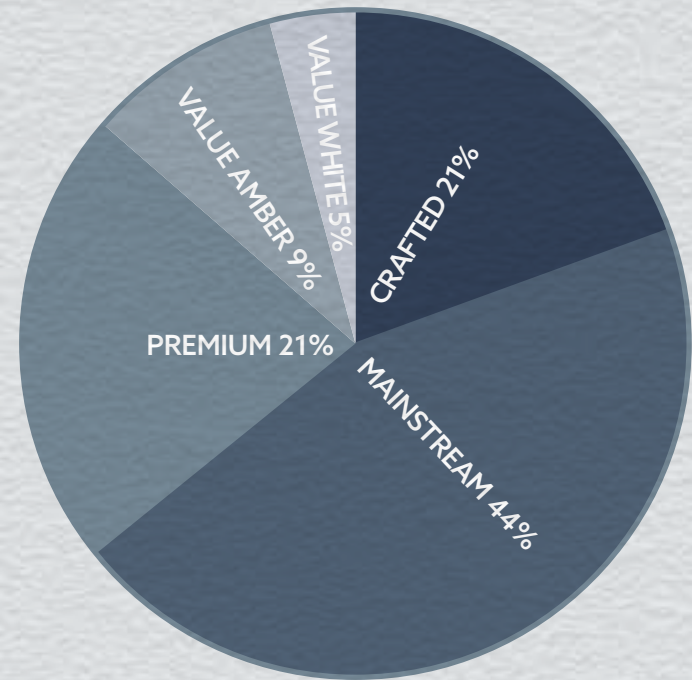
**CIDER VALUE BY RETAILER YOY**

TOTAL CIDER	YOY
Tesco	4.5%
Asda	-2.6%
Sainsbury's	-2.7%
Morrisons	1.3%
The Co-op	-21.5%
Iceland	-3.7%
Waitrose	6.2%
Aldi	5.1%
Lidl	-9.2%
B&M	102.6%
Home Bargains	21.2%
M&S	1.7%
Other	5.3%



# MARKET SHARE BY SEGMENT

Cider is segmented into five product groupings: Value White, Value Amber, Mainstream, Premium and Crafted. Crafted has a higher average price than total Cider and consists of traditional and heritage products. This top tier is in strong growth and contributing additional value to the category.



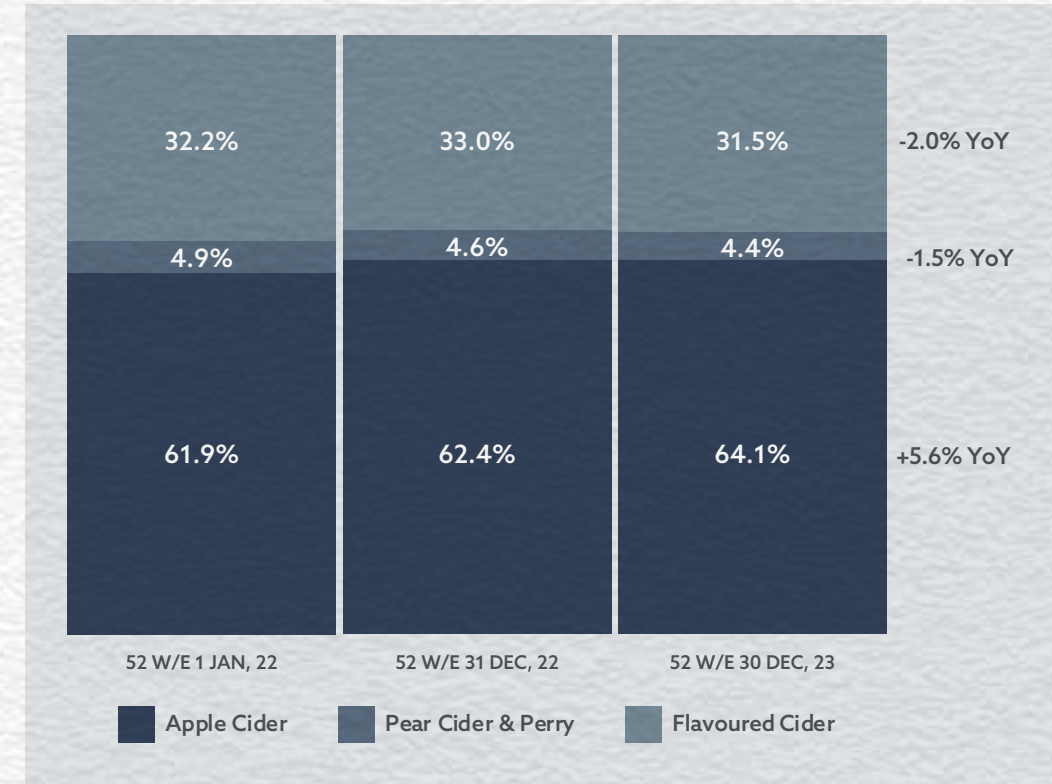
Premium Cider, mainstream and value amber have performed behind total market and, as a result, have lost share. Crafted has made the biggest share gain going from 19.4% a year ago to 21.2%.

Value white has seen some growth from a small base going from 3.9% share to 4.8%. This is being driven by some own label white Cider products in the convenience channel.

# MARKET SHARE BY FLAVOUR

2023 saw the continuation of the trend seen in previous years of apple Cider gaining share. Apple Cider now makes up 64.1% of market value. Flavoured Cider has 31.5% market share which is down from 33.0% in 2022. Pear Cider and perry makes up 4.4% of market value, however this is expected to increase in 2024 with several new pear launches at the end of 2023 and early 2024. The pear Cider market has been dominated by wine-style products in recent years and it is ripe for premiumisation.

Pear currently has 4.4% market share and has performed better than flavoured Cider year on year, down only -1.5%. The segment is still significant worth just under £50 million and attracts 13% of consumers. Pear is likely to have a strong 2024 with several new products landing to excite shoppers.







The latest Kantar data shows that the apple Cider shopper spends more per year than the flavoured Cider shopper, at £89.41 vs £29.39. 27.7% of UK households buy flavoured Cider compared to 23.0% for apple Cider, so apple achieves a higher share of spend from fewer shoppers. The repeat rate for apple Cider buyers is 52.5% whereas for flavoured it is lower at 45.8%. Currently 5.2% of households buy pear Cider spending on average £21.24 annually so there is opportunity there for reinvigoration.



# TOP 10 MANUFACTURERS

Heineken remains the largest Cider maker in the UK. However, their share of the category has dropped from 32.5% last year to 31.0%. Overall, the top ten Cider makers account for 89.2% of sales compared to 89.9% last year, so the big players continue to take almost £9 of every £10 spent on Cider. The only change in the top ten since last year is that Healeys and Brothers have swapped places in the ranking.

Of the top ten, only three Cider makers have seen growth. Westons has added £16.2M to the Cider category compared to last year (+18.3%), Thatchers have grown 14.6% and Brothers have seen growth through their introduction of the Compton Orchard brand.











		VALUE SALES	VALUE SALES % CHANGE VS LAST YEAR			VALUE SALES	VALUE SALES % CHANGE VS LAST YEAR
#1		£347,135,701	-2.0%	#6		£54,480,880	-11.0%
#2		£189,055,219	14.6%	#7		£33,089,933	-5.0%
#3		£154,976,534	-2.2%	#8		£30,636,661	-6.7%
#4		£104,561,133	18.3%	#9		£12,393,176	109.7%
#5		£63,385,546	-7.3%	#10		£10,386,003	-4.0%

# TOP 10 BRANDS

Strongbow Original is the biggest Cider brand and is up 1.0% in value versus last year. The top 9 brands are identical to last year, the only change in the ranking is that Thatchers Blood Orange has entered the top ten and Frosty Jacks has dropped out.

Five of these brands are growing ahead of the total Cider market (+2.8%): Thatchers Gold, Henry Westons Vintage, Thatchers Haze, Inchs and Thatchers Blood Orange. Strongbow Dark Fruit value is down by £10.2M compared to last year, the Kopparberg flavoured brands have also seen a decline. Magners original is down -3.3%, a reduction in sales of £1.5M.

As cost of living concerns continued through 2023, it is reassuring to see that more premium Cider such as Henry Westons Vintage continues to grow.

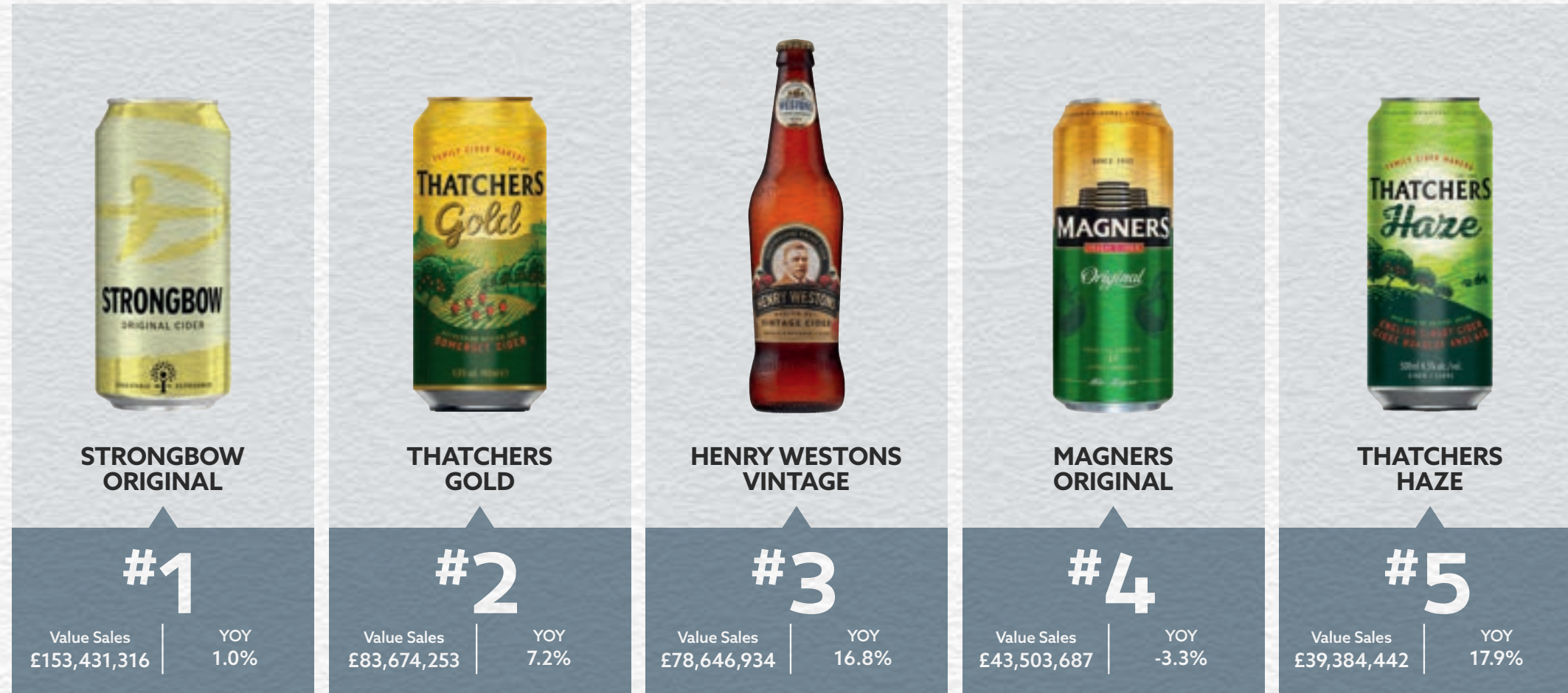
		VALUE SALES	VALUE SALES % CHANGE VS LAST YEAR			VALUE SALES	VALUE SALES % CHANGE VS LAST YEAR
#1		£153,431,316	1.0%	#6		£52,597,073	-6.1%
#2		£90,518,156	-10.1%	#7		£43,503,687	-3.3%
#3		£83,674,253	7.2%	#8		£39,384,442	17.9%
#4		£78,646,934	16.8%	#9		£32,631,915	55.4%
#5		£63,497,992	-5.2%	#10		£25,607,318	34.9%



# TOP 5 APPLE BRANDS

The top 5 apple Cider brands have remained the same as last year, although Thatchers Haze has narrowed the gap between it and Magners. Magners is in 3.3% decline.

Thatchers Haze has increased by £6.0M, and Henry Westons Vintage has added £11.3M to the brand value since last year. This brand is also the only one that is 100% in a glass bottle format. Strongbow, Thatchers Gold, Magners and Thatchers Haze all sell over 80% of their value in cans.



# TOP 5 FLAVOURED BRANDS

The top five brands have stayed the same as last year. Total flavoured Cider is -2.0% versus last year so only Thatchers Blood Orange is performing ahead of the market. Beyond the headline number there are pockets of growth, for instance Kopparberg Strawberry and Lime can 330mlx4 is up 7.2% year-on-year.

Outside of the top five, Old Mout Strawberry and Apple in 7th place is in growth of 16.6%, and Strongbow Tropical is new to the market ranked 8th and worth £6.5M.





# TOP 5 NPD

Last year saw blood orange flavours in the top NPD brands, this year is more of a mix and the top product is tropical flavour. Strongbow Tropical launched in March and is worth £6.5M and available in various formats including a 500ml glass bottle, 4x440ml can and 10x440ml can.

Three Kopparberg launches are grouped together in 2nd place with summer punch worth £2.6M, the variety pack £2.3M and Strawberry & Pineapple worth £1.2M.

In 3rd place Thatchers Apple and Blackcurrant launched in November, again in various formats, and is worth £4.3M.

Brothers' brand Compton Orchards is a medium dry apple Cider and was launched in a 500ml can and 2L PET bottle. It was well-timed to capitalise on cost-of-living concerns as shoppers look for quality at an accessible price point.

Kopparberg Spiced Apple was available from autumn 2023 with its biggest sales period over Christmas (the 4 weeks ending 30th Dec) fulfilling the mulled Cider role.



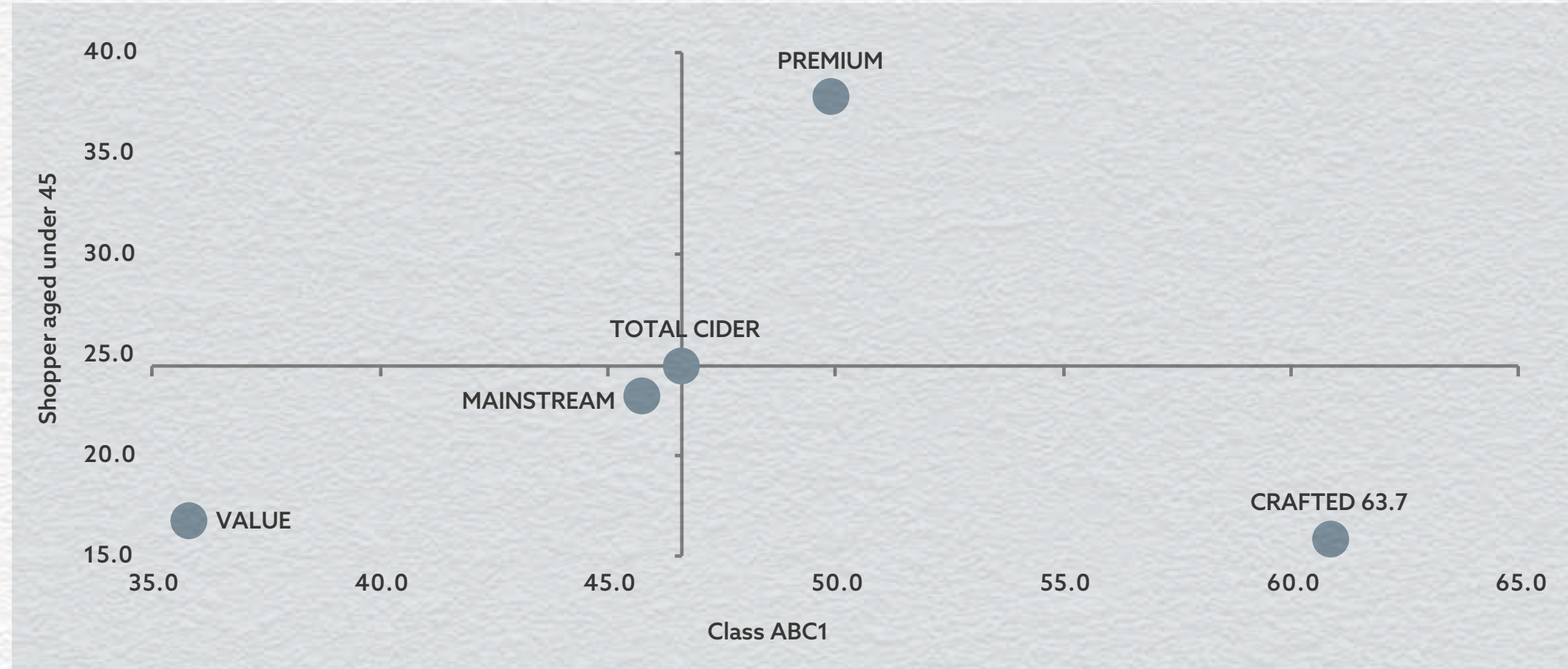


# CRAFTED CIDER

Crafted Cider has once again had an incredibly strong year. Whilst total Cider value is +2.8, crafted grew +12.2% contributing £25.8M. Share has gone from 19.4% last year to 21.2%.

This segment adds value to the overall category attracting an average price per litre of £3.70 compared to total Cider at £2.55/L. Crafted average price has risen 14.1%, ahead of the market with its 6.8% increase.

Crafted has the highest number of ABC1 shoppers with 61% of spend coming from this demographic.



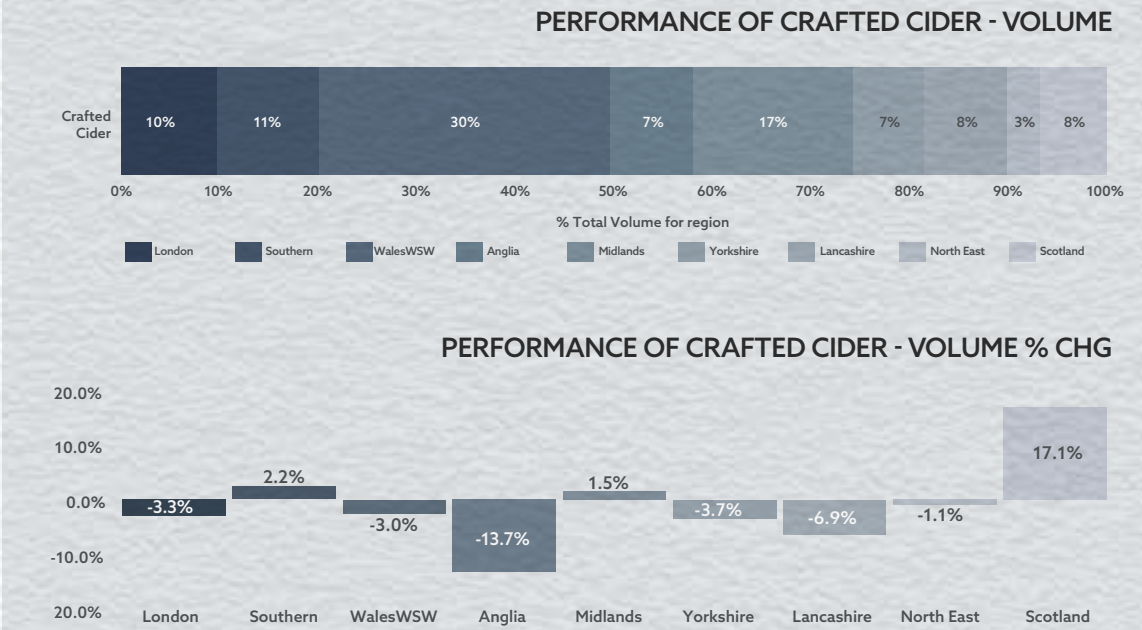
## CRAFTED TOP TEN BRANDS



The ranking is largely the same as last year except for the new Thatchers product coming in at number ten. 81% of total crafted value comes from the top ten brands, combined they are up 17.8% year-on-year. 7 of the top ten crafted brands are showing strong growth whereas Aspall Premier Cru, Thatchers Rose and Thatchers Cloudy Lemon are seeing a decline versus last year.

## CRAFTED CIDER BY REGION

Total Cider has 20% of its volume sold in Wales and the south west, for crafted Cider this is even higher with 30% of volume going through this region. When planning a Cider range, it is important that the space given to crafted Cider is upweighted in key areas such as Wales, the south west and the midlands. For best selling crafted SKUs, enough facings to prevent out of stocks is of critical importance, as empty shelves at key trading periods mean sales opportunities are lost. Crafted has been a key driver of overall Cider performance for a good few years now so an optimised crafted range is the best way to grow sales. It is important to note that the YOY changes by region are in volume so will differ from the value performance quoted above.

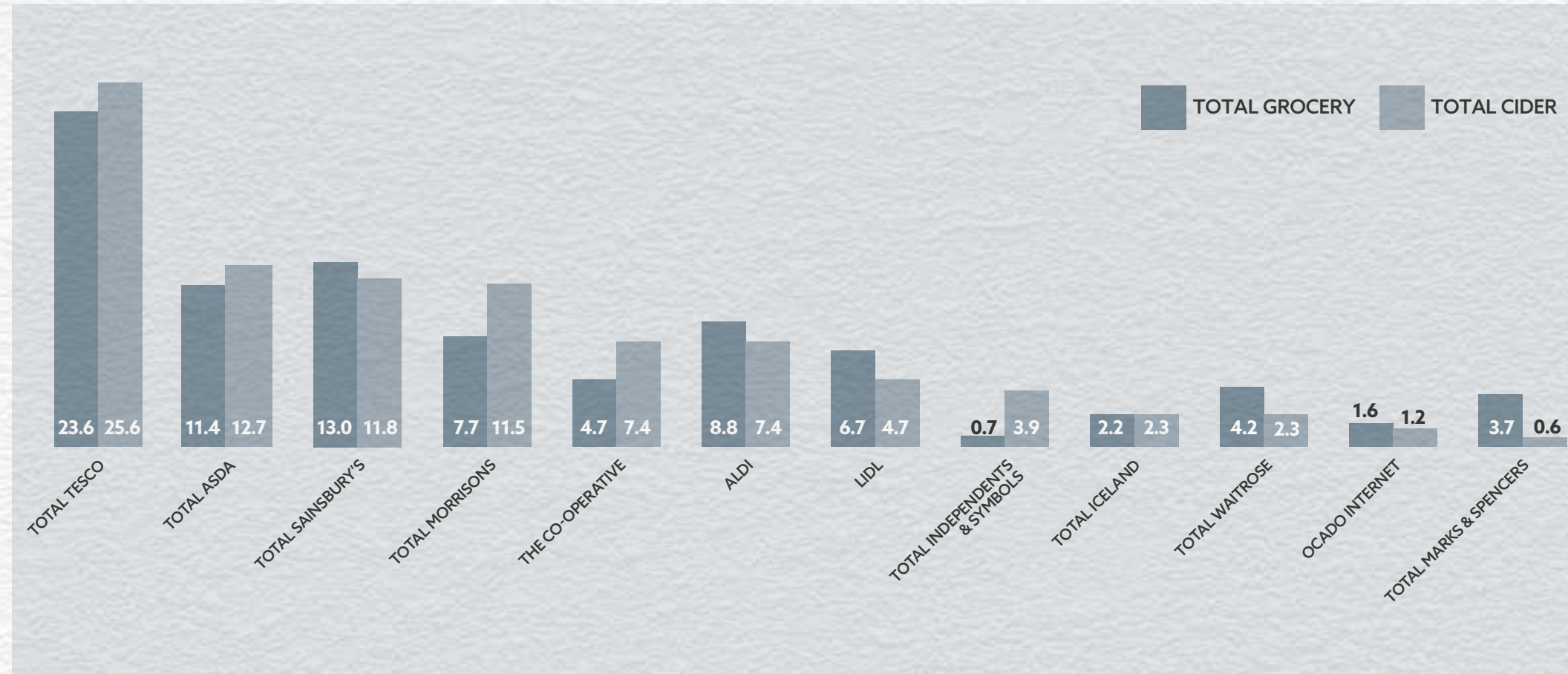




# CIDER RETAILERS

## RETAILER CIDER SHARE VS TOTAL GROCERY SHARE

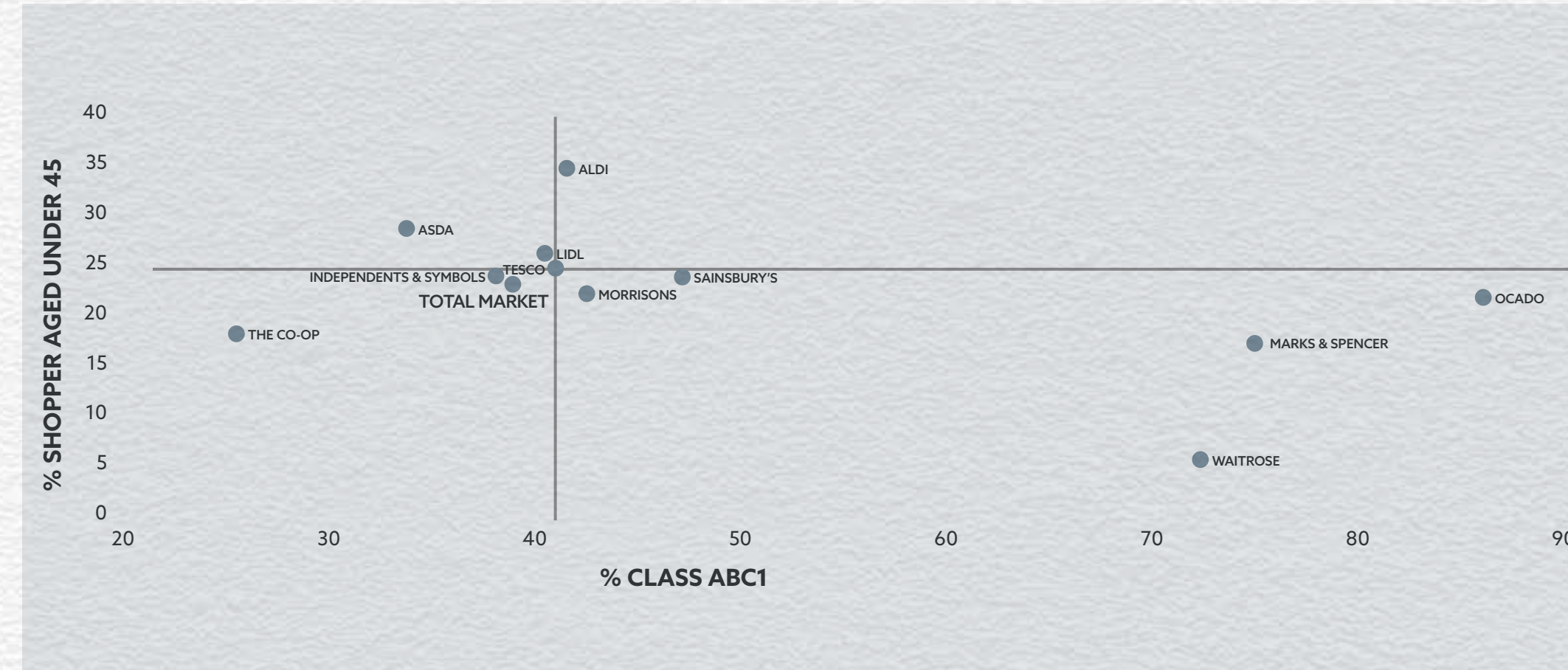
Tesco is the largest Cider retailer with 25.6% share of spend. This is an overtrade compared to their 23.6% share of grocery spend. In last year's report, Tesco had 24.5% share of Cider so they have made progress this year. Asda and Morrisons continue to overtrade in Cider. The Co-op have a strong overtrade in Cider accounting for 7.4% of Cider spend, however this is a drop compared to the 9.4% share seen in last year's report.



## CIDER SHOPPER DEMOGRAPHICS BY RETAILER

Looking at shopper profile, Ocado, M&S and Waitrose have the most affluent shopper. 86.9% of Ocado spend comes from ABC1 shoppers. Waitrose has the oldest shopper, and Aldi the youngest with 34.3% of spend coming from shoppers under the age of forty-five.

The Co-op has the least affluent shopper (35.2% class ABC1) which is interesting as it has one of the highest average prices per litre at £2.73.





# CONVENIENCE OVERVIEW

The convenience market has remained the same as last year at 50% of total market value. Year-on-year performance is slightly behind total market with value +2.2% (vs. +2.8%) and volume -2.7% (vs. -3.8%).

Like total Cider, in convenience, crafted is in robust growth at +5.8%. Crafted has 18% value share compared to 21% in the total market so there is still headroom for further crafted growth in the convenience channel.

## CONVENIENCE TOP 10 SKUS



Henry Westons Vintage 500ml is the number one SKU in the convenience channel, £17.6M ahead of the second place product and in double digit growth. Only 2 other SKUs are in year-on-year growth, these are Strongbow ten pack and 4 pack pint can.

Pack sizes are smaller in this channel with singles and four packs dominating the top ten. Larger packs have a role, however, as Strongbow Dark Fruit 10 pack is the fourth highest ranked pack. Last year there were two large PET plastic bottles in the top ten, however, these have now dropped down the ranking.

Within convenience, symbol groups (e.g., Londis, Spar) are seeing the best year-on-year performance with value +4.1%. Symbols represent a strong growth opportunity particularly for crafted Cider which currently has just 15.9% share so has a way to go to match the market at 21%.





# ON TRADE MARKETPLACE

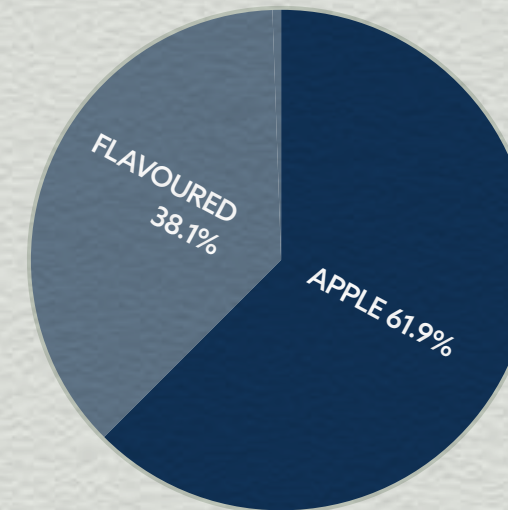
The On Trade marketplace, from a Cider perspective, during 2023 has seen much instability and this looks set to continue well into 2024.

# ON TRADE

- #1** Apple continues to dominate
- #2** Flavoured is becoming less relevant on draught
- #3** Consolidation through RTM's and major brewer composite deals including beer & cider
- #4** How the Off Trade marketplace is shaping brands in the On Trade
- #5** Genuine premiumisation, not the effects of simply inflation

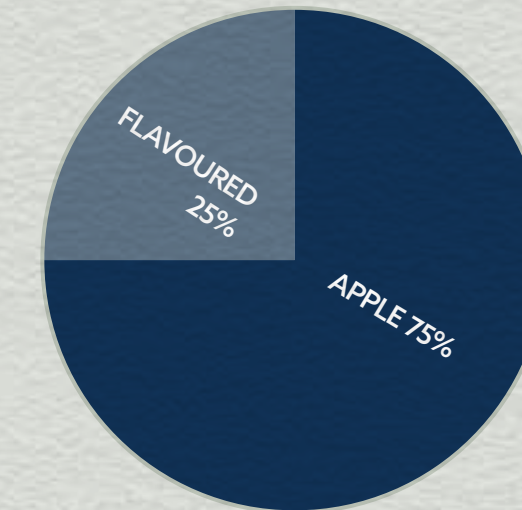
## APPLE CONTINUES TO DOMINATE

**ON TRADE TOTAL MARKET VOLUME SHARE - FLAVOUR**  
Apple continues to gain volume share over flavoured Ciders vs December 2022



## FLAVOURED IS BECOMING LESS RELEVANT ON DRAUGHT

**TOTAL DRAUGHT VOLUME SHARE - FLAVOUR**



Distribution of draught flavoured Cider has plateaued, with the underlying trend indicating a move from mainstream into more premium brands.

With an average flavoured draught ROS significantly lower than Apple there is little value to an outlet, unless geography or Cider drinker dictates. On average draught Flavoured is 11.3hls / outlet / pa whereas Apple is 20.9 hls / outlet / pa



# ON TRADE MARKETPLACE

## CONSOLIDATION, BOTH FROM A MACRO & OUTLET PERSPECTIVE

Britain's total licensed premises are showing a 20 year loss of over 44%; there were 144,055 outlets in 2003 vs 99,113 outlets in December 2023. As we enter 2024, the landscape is delicately poised after a further 800 outlets were lost in Q4 alone (nearly 9 outlets per day). More positively though, it's now much healthier than the 24 closures a day recorded by CGA / Alix Partners in mid-2022.

At the end of 2023 Britain had  
**99,113 LICENSED PREMISES,**  
a quarter-on-quarter net drop of 0.8%  
and a YoY decline of 2.9%.

**16,000 FEWER**  
than in March 2020 just before COVID hit

From an outlet's perspective, greater consolidation and reduced choice has been brought about by the composite range deals being offered by major brewers as they tie Beer & Cider portfolios into a single commercial & cellar service agreement.

## HOW THE OFF TRADE MARKETPLACE IS SHAPING BRANDS IN THE ON TRADE

With two thirds of total UK Cider volume now being purchased in the Off Trade, brands need to effectively command a presence in both channels to ensure consumer awareness, visibility and confidence. Strong brands will offer an Off Trade at home occasion, either mainstream or premium and delight consumers with an On Trade presence. On Trade outlets can benefit hugely from best-performing brands in the Off Trade.

## GENUINE PREMIUMISATION, NOT THE EFFECTS OF INFLATION

Total Cider has seen a value increase of +4.7% vs YA but this is driven largely by the effects of premiumisation as interest moves from mainstream draught brands into more premium crafted brands and the move from draught flavoured Cider back into packaged formats.

Outlets looking to maximise Cider revenues should carefully review their draught Cider range and consider switching to more premium brands.





# ON TRADE

## SNAPSHOT

**£1,933.7M IS SPENT ON CIDER IN THE ON TRADE +4.7% VS YA**



**255 million litres** of Cider were purchased, up +0.5% vs YA



On Trade **volume share is 76.4% draught serve**, +0.5% YoY and **23.6% packaged serve**, +0.6% YoY



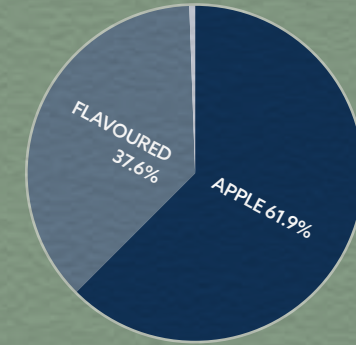
The average price of a pint of Cider is **£4.31**, +£0.17 vs YA



The average On Trade outlet sells **27.7 hls of Cider per year**, +4.2% vs YA

There are **92,095 Cider distribution points** (apple & flavoured), -3.5% vs YA

On Trade **value share is 71.4% draught serve** +4.9% growth YoY and **28.6% packaged serve**, +4.0% YoY



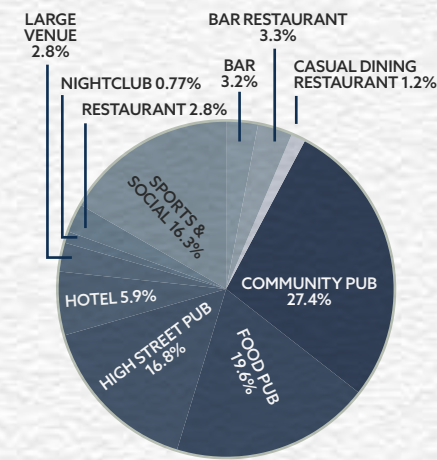
### FLAVOUR

Type	Share	Growth
Apple Cider	61.9%	+0.8%
Flavoured Cider	37.6%	+0.3%
Pear Cider	0.5%	-12.1%



### TENURE

Type	Share	Growth
Free Trade	43.6%	-3.0%
Managed	33.8%	+3.1%
Non-managed	22.6%	+3.9%



### VENUE

Type	Share	Growth
Bar	3.2%	-1.6%
Bar Restaurant	3.3%	+8.7%
Casual Dining Restaurant	1.2%	-10.0%
Community Pub	27.4%	+0.6%
Food Pub	19.6%	+3.3%
High Street Pub	16.8%	+0.4%
Hotel	5.9%	+1.8%
Large Venue	2.8%	-2.9%
Nightclub	0.77%	-12.7%
Restaurant	2.8%	-0.7%
Sports & Social	16.3%	-0.6%

## CIDER REGIONALITY

### TOTAL CIDER

Over 54% of total Cider volume is focussed in just 4 TV regions - South West, Central, London & Lancashire. Each with a different format profile, be it apple, flavoured, draught or packaged

Region	# Ranking	% Share	% Growth
South West	1	15.40	-2.4
Central	2	15.14	-1.6
London	3	13.63	-0.3
Lancashire	4	10.79	+1.0
Yorkshire	5	10.49	-0.2
South & SE	6	9.56	+1.5
Scotland	7	6.70	+6.8
Wales	8	6.35	+6.6
North East	9	6.19	+1.7
East	10	5.76	+1.1

### DRAUGHT APPLE

The South West is the leading region for draught apple Cider with nearly 20% of total UK draught apple volume.

Region	# Ranking	% Share	% Growth
South West	1	19.43	-2.9
Central	2	16.03	-1.2
London	3	14.59	3.4
South & SE	4	10.30	3.7
Yorkshire	5	8.42	2
Lancashire	6	8.14	-0.5
Wales	7	7.15	9.3
Scotland	8	5.39	7.7
North East	9	5.31	6.4
East	10	5.24	2.2

### DRAUGHT FLAVOURED

Despite Central currently being the largest TV region for draught flavoured Cider, the northern bias remains for flavoured Cider. Although from a volume perspective only two TV regions are currently in growth with the majority in decline as focus moves to packaged flavoured.

Region	# Ranking	% Share	% Growth
Central	1	16.29	-3.6
Lancashire	2	15.75	-2.9
Yorkshire	3	14.23	-5.2
South West	4	9.04	-3.6
North East	5	8.74	-4.8
London	6	8.21	-3
South & SE	7	8.11	-0.7
Scotland	8	8.10	3.8
Wales	9	6.31	0.7
East	10	5.21	-8.8

### PACKAGED APPLE

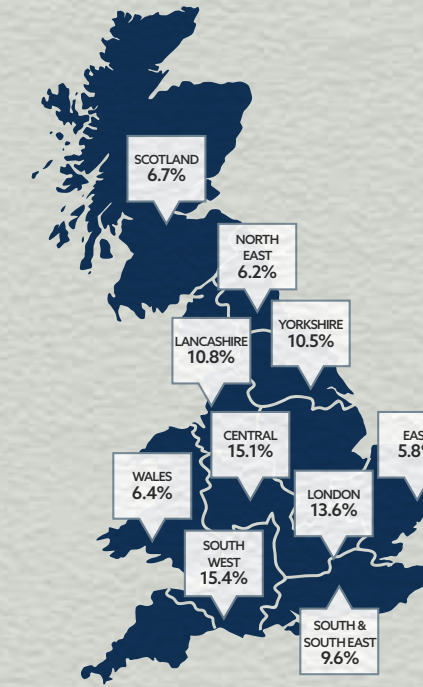
London by far is the largest geography for packaged apple Cider but overall packaged is in decline as focus moves back into draught.

Region	# Ranking	% Share	% Growth
London	1	20.97	-14.1
South West	2	12.71	-8.2
Lancashire	3	12.62	-0.9
Central	4	9.95	-13.1
Scotland	5	9.94	0.1
East	6	8.46	3.6
South & SE	7	8.16	-20
Yorkshire	8	7.62	-8.9
Wales	9	4.98	-3.5
North East	10	4.60	-8.7

### PACKAGED FLAVOURED

Packaged flavoured mirrors packaged apple with London being the leading geography.

Region	# Ranking	% Share	% Growth
London	1	14.22	-3.6
Yorkshire	2	13.82	3.2
Lancashire	3	13.37	10.6
Central	4	12.65	2.9
South West	5	10.09	4.8
South & SE	6	9.15	0.3
Scotland	7	8.50	11
East	8	7.18	5.9
North East	9	6.73	2.3
Wales	10	4.30	7





# ON TRADE SEGMENTATION

## DRAUGHT APPLE

### GOOD

34.0% OF TOTAL DRAUGHT APPLE  
-6.2ppts YoY Average RSP £3.67

#### MAINSTREAM APPLE

Functional, high volume, mass market brands. Commodity based & reliable. Little consumer category engagement.



### BETTER

51.3% OF TOTAL DRAUGHT APPLE  
+5.9ppts YoY Average RSP £4.09

#### PREMIUM MAINSTREAM APPLE

Trade-up brands with greater consumer category engagement. Authenticity, taste & provenance are key purchase drivers.



### BEST

13.8% OF TOTAL DRAUGHT APPLE  
+0.3ppts YoY Average RSP £5.05

#### CRAFTED APPLE

Premium taste & profile experiences. Highly engaged consumer looking for new discoveries.



## DRAUGHT FLAVOURED CIDER

### GOOD

43.2% OF TOTAL DRAUGHT APPLE  
-8.8ppts YoY Average RSP £3.57

#### MAINSTREAM APPLE

Functional brands. Commodity bases & reliable. Little consumer category engagement.



### BETTER

42.4% OF TOTAL DRAUGHT APPLE  
+4.6ppts YoY Average RSP £4.02

#### PREMIUM MAINSTREAM APPLE

Trade-up brands with greater consumer category engagement. Authenticity, taste & provenance are key purchase drivers.



### BEST

14.4% OF TOTAL DRAUGHT APPLE  
+4.2ppts YoY Average RSP £4.68

#### CRAFTED APPLE

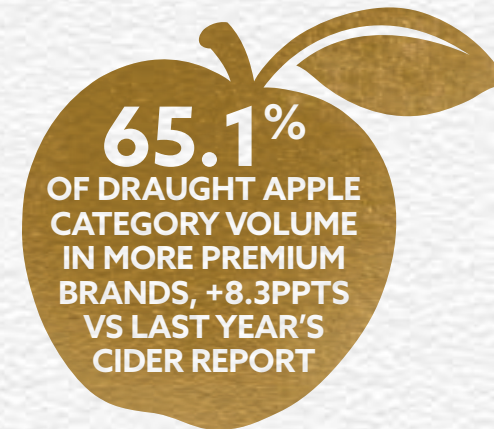
Premium taste & profile experiences. Highly engaged consumer looking for new discoveries.



In massive increase vs the 2023 Cider Report, the move from mainstream into more premium brands continues into 2024 as we see genuine premiumisation, not the effects of inflation.

Mainstream apple has an average RSP of £3.67 per pint, Premium brands now account for 65.1% of draught apple Cider and combined they attracted an average RSP of between 42p-£1.38 more than Mainstream.

Total draught and packaged shares remains consistent with 2023, with draught commanding the lion's share at 76.4%.



Draught flavoured Cider, despite a long period of decline, has recently stabilised to represent just 25% of the total draught category.

Strongbow Dark Fruit remains the market leader with 45.7% share, a reduction of 6.7pps from December 2022 as new, more premium draught flavoured Ciders become firmly established, including Old Mout Berries & Cherries, Cornish Ratler Berry & Stowford Press Dark Berry.

Premiumisation is clearly evident, Mainstream Flavoured has an average RSP of £3.57 per pint, where premium brands average £4.02 - £4.68.





# GROWTH OF CRAFTED

As with its Off Trade counterpart, the burgeoning crafted, premium Cider category continues to grow, offering On Trade outlets a point of differentiation and, more importantly, opportunities to add value. This is not to be confused with the traditional still Ciders as they are infinitely more contemporary.



Back in December 2022 the category represented **9.8% volume share** of total draught apple yet in 2023 it now represents **13.8%, +4ppts**

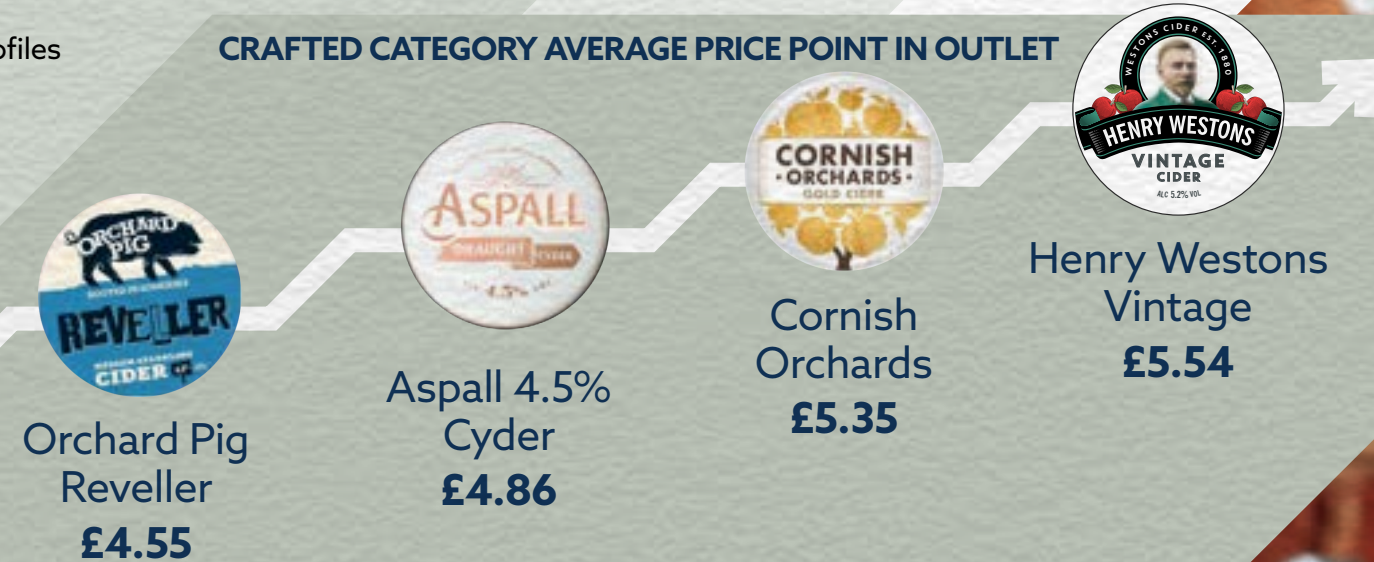
Inflationary effects aside, this category is showing genuine premiumisation in the draught apple category as finally Cider catches up with its BWS peers.



Henry Westons Vintage commands an average **RSP of £5.54** vs a draught apple Cider average of £4.03, +37.5%

The crafted category has a diverse range of styles, profiles and ABVs, each offering something unique in its proposition, from apples of a single year's harvest, bittersweet Cider apples or culinary dessert flavours. The leading brands within this category include Henry Westons Vintage, Aspell 4.5%, Cornish Orchards & Orchard Pig. This category, more than any other, is perfectly positioned to sit alongside the dynamic range of premium world Beers and sunshine Mediterranean Beers which are revolutionising the draught Beer category.

## CRAFTED CATEGORY AVERAGE PRICE POINT IN OUTLET

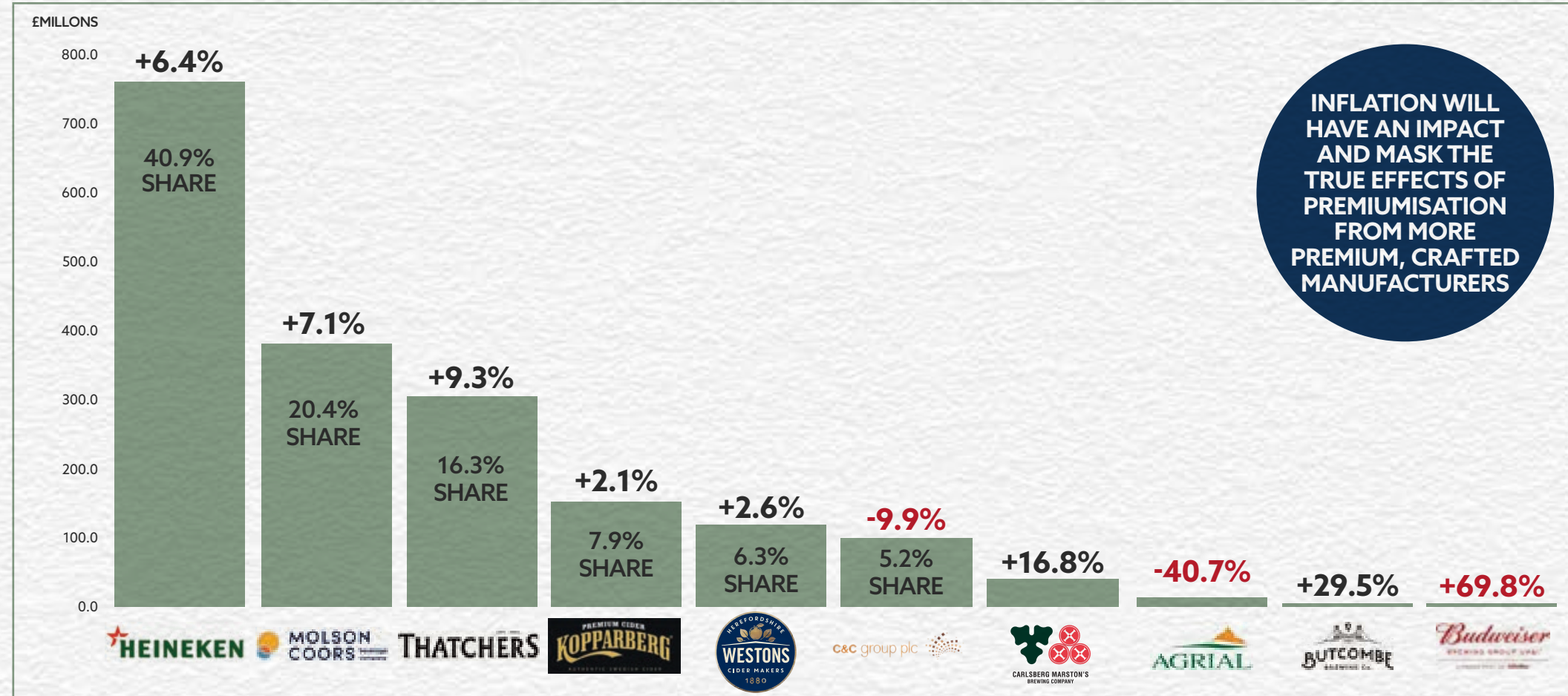




# TOP 10 MANUFACTURERS

Topline performance across the top 5 manufacturers remains broadly consistent with the 2023 Cider Report. Lower down the table, performance is well beneath the category average with C&C Group, Agrial and Budweiser Brewing all falling into value decline.

The collective gap between Heineken, Molson Coors, Thatchers, Kopparberg and Westons vs the remainder of the category remains. The Top 5 manufacturers represent just over 91% value share of the category, +4.3ppts vs 2023.



INFLATION WILL HAVE AN IMPACT AND MASK THE TRUE EFFECTS OF PREMIUMISATION FROM MORE PREMIUM, CRAFTED MANUFACTURERS





# ON TRADE STOCKING RECOMMENDATIONS

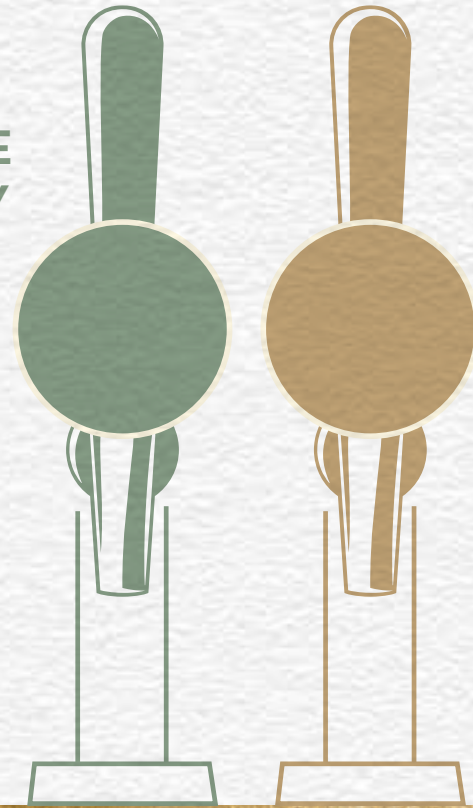
To be efficient and effective, draught Cider ranging needs to be fully aligned to the key category dynamics to drive revenue, relevance and footfall into outlet.

As Cider tap numbers are squeezed by a combination of factors including the cost of living, the growth of premium world Beers on tap and the dominance of major brewer composite deals, outlets need to carefully consider the role of premium apple Cider, the role of flavoured Cider and also the style of their own outlet and consumer.

Ensuring 'right brand, right outlet' has never been more important.

Simply, more premium brands will deliver greater margin and satisfy consumer demand. Equally true in mainstream, with affordable quality Ciders that offer a trade-up and in premium with more discovery and authentic Ciders.

OUTLETS ARE MORE LIKELY TO HAVE 2 DRAUGHT CIDER LINES THAN 1, HOWEVER, THIS HAS COME DOWN SLIGHTLY VS YA



THE AVERAGE DRAUGHT CIDER STOCKIST STOCKS

**1.6** DRAUGHT CIDERS

ON THE BAR

-1.0 VS YA

OUTLETS ARE RATIONALISING THEIR CIDER RANGES AND REDUCING THE NUMBER OF LINES, GENERALLY LOOKING TO CONSOLIDATE THEIR OFFERING

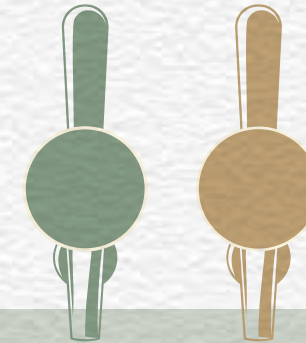


**51.6%**

of Draught Cider stockists stock

**1 DRAUGHT CIDER**

+ 1.2pp vs YA

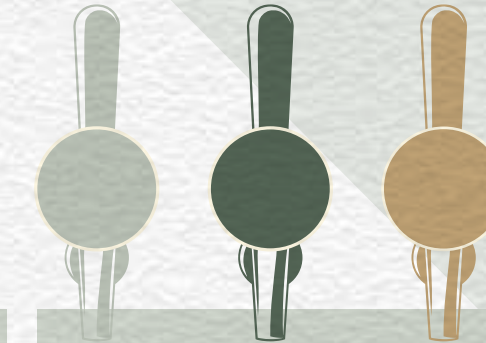


**37.5%**

of Draught Cider stockists stock

**2 DRAUGHT CIDERS**

- 1.1pp vs YA

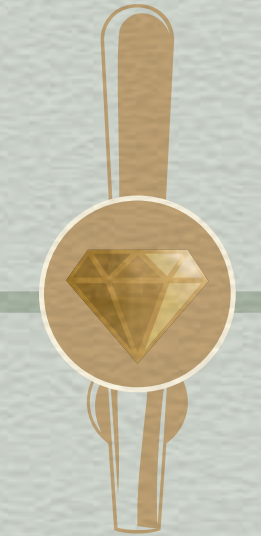


**10.9%**

of Draught Cider stockists stock

**3 OR MORE DRAUGHT CIDERS**

- 0.1pp vs YA



However, this rationalisation often involves a premium Cider line which we see more of than YA

**19.3%**

of Premium Draught Cider stockists stock

**2 OR MORE PREMIUM DRAUGHT CIDERS**

+1.7pp vs YA



# ON TRADE REGIONAL CIDER OPPORTUNITY

Insight is clearly showing that a UK-wide draught Cider ranging model is inappropriate. Regional dynamics are at play which drive a more flexible approach when considering the number of Ciders, flavours and formats to be stocked.

	DRAUGHT APPLE SHARE	DRAUGHT FLAVOURED SHARE	SUGGESTED NUMBER OF TAPS	DRAUGHT RANGE RECOMMENDATION
SCOTLAND	66.5%	33.5%		1 x apple tap + 1 x flavoured tap
LANCASHIRE	60.7%	39.3%		1 x apple tap + 1 x flavoured tap
CENTRAL	74.6%	25.4%		1-2 differentiated apple taps. Consideration to draught flavoured if sufficient volume or packaged flavoured
WALES	77.0%	23.0%		1-2 differentiated apple taps. Consideration to draught flavoured if sufficient volume or packaged flavoured
SOUTH WEST	86.5%	13.5%		2 x differentiated apple taps. No draught flavoured, packaged only



	DRAUGHT APPLE SHARE	DRAUGHT FLAVOURED SHARE	SUGGESTED NUMBER OF TAPS	DRAUGHT RANGE RECOMMENDATION
NORTH EAST	64.4%	35.6%		1 x apple tap + 1 x flavoured tap
YORKSHIRE	63.8%	36.2%		1 x apple tap + 1 x flavoured tap
EAST	74.8%	25.2%		1-2 differentiated apple taps. Consideration to draught flavoured if sufficient volume or packaged flavoured
LONDON	84.0%	16.0%		2 x differentiated apple taps. No draught flavoured, packaged only
SOUTH & SOUTH EAST	79.0%	21.0%		1-2 differentiated apple taps. Consideration to draught flavoured if sufficient volume or packaged flavoured

## AS A GENERAL GUIDE:

Regions with over 70% draught apple share need a clear apple focus. Draught flavoured may be considered if sufficient volume, alternatively a range of packaged flavoured considered to satisfy flavoured Cider consumers

Seasonality is also a consideration. Draught flavoured for light night refreshment, then replacing with a draught apple for dark night sipping and savouring a more characterful apple Cider

Regions with less than 70% draught apple share need to consider a draught flavoured

Type of outlet will dictate the style of draught apple stocked - either mainstream or mainstream + premium. These must be clearly differentiated to offer choice and discovery

More premium, destination food outlets will only need a single premium draught Cider, with flavoured limited to packaged



# ON TRADE

## BEER SNAPSHOT

Beer holds the lion's share of value at a topline BWS level at 86%, with an increase a year ago of 0.3%. Comparatively total Cider is much smaller with 12% value share.

When looking back across 2023, total Beer volume was just down -0.4% but value growth exceeded 4% as the effects of inflation and premiumisation combine. In terms of winners, stout remains the standout performer, +17% year on year, but is only 9.5% share of total Beer. Ale remains challenged and is down -3.4%, but is still significant in share with 25% total Beer. Total Lager is 66% share of Beer and is down -1.3%, with standard Lager contributing significantly to this, being down -8.7%. Premium lager is now 36% volume share of Beer, and this is where the growth opportunity remains as it is up +5.8%.

**PREMIUM WORLD LAGER OUTSHINES TOTAL BEER, DELIVERING STRONG RETAIL VALUE FOR AN OUTLET**



Navigating the premium world Beer category is complex with a multitude of brands, flavours and styles but a simple rule of thumb would be to recommend an outlet stocks at least one from each of the highlighted segments. This ensures a well differentiated range with limited duplication.



**PREMIUM WORLD LAGER is the largest sector in the UK Total Beer Market**  
**+19.5% Volume, +23.4% Value**  
 Sales stealing share from Standard Lager, Premium Lager & Premium 4% Lager

**PREMIUM WORLD LAGER commands a massive 93.5% distribution**  
 across the Total Beer Sector & continues to grow at the expense of Cask Standard Bitter, Cask Ale, Standard Lager & Premium Lager

**PREMIUM WORLD LAGER offers an outlet the highest incremental retail value in the total Beer sector**  
**+150.2% Vs Premium Lager**










# INTERNATIONAL

## SNAPSHOT



### TOP TEN LARGEST CIDER MARKETS BY VOLUME

The UK is larger than the rest of the top five countries combined.

 UNITED KINGDOM 840 MILLION LITRES #1	 SOUTH AFRICA 399 MILLION LITRES #2	 USA 155 MILLION LITRES #3	 AUSTRALIA 142 MILLION LITRES #4	 ARGENTINA 112 MILLION LITRES #5
 SPAIN 105 MILLION LITRES #6	 CANADA 95 MILLION LITRES #7	 GERMANY 69 MILLION LITRES #8	 REP. OF IRELAND 67 MILLION LITRES #9	 FRANCE 66 MILLION LITRES #10

Globally, Cider volumes are expected to increase in both the on and Off Trade channels in the coming years. The On Trade is expected to reach 815 million litres and the Off Trade 1903 million litres in 2026.







# WESTONS CIDER REPORT 2024

## WE'D LOVE TO HEAR FROM YOU!

We would really like to hear from readers  
and invite you to share your thoughts:  
[CiderReport@westons-cider.co.uk](mailto:CiderReport@westons-cider.co.uk)

Written & compiled by:

Tim Williams Insight & Innovation Manager

Emily Jenkins Off Trade Category Manager

Helen McIlveen On Trade Category Manager


Westons Cider would like to thank the following contributors to the 2023 Westons Cider Report

Special thanks to contributors:

Nicola Knight IGD, Fenella Tyler National Association of Cidermakers, Chris Sterling CGA by Nielsen, Gabe Cook The Ciderologist,  
Chloe Gbadero Kantar, Jack Street Circana

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Much Marcle, Ledbury, HR8 2NQ