



The European
Cider & Fruit Wine
Association

European Cider Trends 2019



European Cider and Fruit Wine Association, 2019

Introduction

European Cider Trends 2019 is a collaboration between Global Data and the European Cider and FruitWine Association (AICV) in producing a guide that demonstrates the current:

- Key markets for cider (which includes perry, fruit flavoured cider and in some countries fruit wine)
- Tax rates in a number of key cider markets
- The important contribution which cider production makes to EU Agriculture

Although considerably smaller than the wine, beer, or spirits industries, it is nevertheless a fact that in recent years in some EU countries cider and fruit wines have enjoyed one of the fastest growth rates of all alcoholic beverages, underlining the continuous popularity of fermented fruit drinks down the ages.

The purpose of the document is to increase the awareness of cider to stakeholders (principally lawmakers and those involved with policy formulation) who may not be familiar with cider and all its varieties.

What is Cider?

Cider¹ is an alcoholic beverage obtained only by the complete or partial fermentation of:

- the juice of fresh apples, or
- the reconstituted juice of concentrate made from the juice of apple, or
- the mixture of juice of fresh apples and of reconstituted juice of concentrate made from the juice of apple

The product will have in general an alcohol content within the range of 1,2 % to less than 8,5 % alcohol by volume (ABV), and should maintain the character of fermented apple juice. Adding distilled alcohol to cider is forbidden.

Reduced-alcohol ciders also exist on the market and these are classified as:

- **alcohol-free cider** (or non-alcoholic cider) when less than 0,5 % ABV
- **low-alcohol cider** when more than 0,5 % ABV and less than 1,2 % ABV

In the late 1980's modern ciders were born: ciders containing juice and flavourings began to be produced, alongside traditional ciders. The industry calls these '**flavoured ciders**', and they can contain, in addition to the apple base, ingredients such as juice of other fruits, extracts, flavourings, etc.

Another innovation is the so-called 'cidre de glace' (or 'ice cider'), which is a cider made only from the fermentation of frozen juice, or frozen apples. There is no addition of water, sugar or alcohol, and alcohol content is above 7 %.

¹ For a more detailed definition consult the AICV Code of Practice (www.aicv.org)

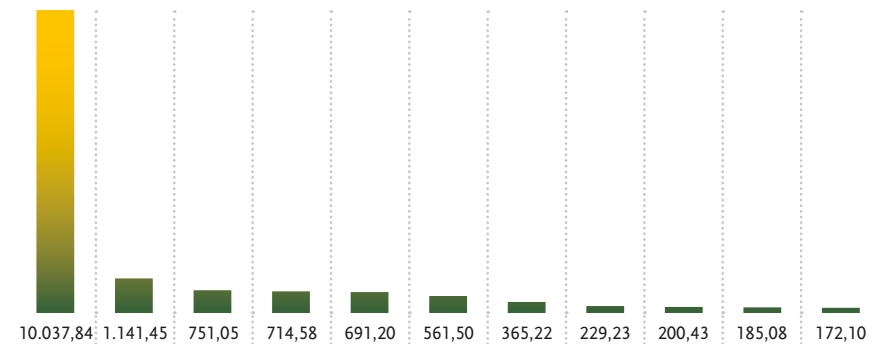
Cider* – Leading Markets

UK	Spain	France	Ireland	Germany	Poland*	Finland	Ukraine	Russia	Czech Rep.	Sweden
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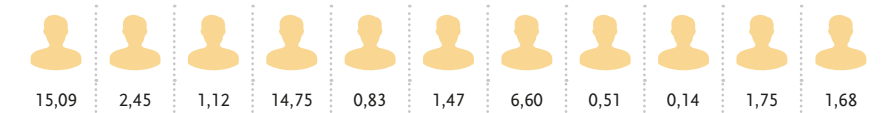
5yr CAGR 2013-2018

-0,56%	3,18%	-3,03%	1,93%	0,24%	0,01%	-3,61%	33,39%	37,69%	121,13%	2,31%
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Volume in '000 HL



Per Capita



* Including Somersby which is Apple Beer Drink in Poland

Cider ^{**} – Smaller Markets

Country	Volume Th Hectoliters
>100 KHL	
Bulgaria	138,52
Romania	136,56
Netherlands	130,00
Lithuania	122,65
Norway	122,59
Portugal	120,31
Switzerland	117,53
Austria	106,42
50 - 99 KHL	
Hungary	88,53
Latvia	87,05
Estonia	82,92
Denmark	74,39
Belarus	61,67
<50 KHL	
Slovak Republic	41,56
Belgium	41,42
Croatia	32,20
Greece	32,00
Serbia	20,30
Bosnia-Herzegovina*	13,40
Slovenia	9,43
Turkey	8,29
Italy	5,41
Iceland*	3,69
Moldova*	3,33
Cyprus*	2,60
Malta*	1,10
Macedonia*	1,05
Montenegro*	,85
Luxembourg*	,70

** Data for smaller markets is a forecast

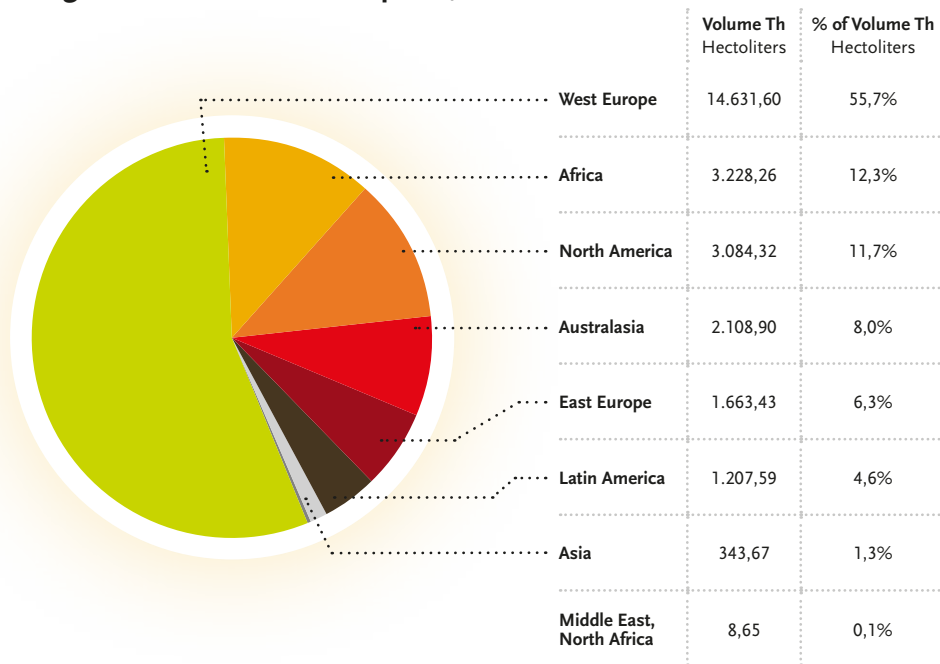
Europe: Fastest Growing Cider Markets ^{5YR CAGR}

Czech Republic	121,13
Romania	117,59
Slovenia	53,68
Bulgaria	50,12
Portugal	45,58
Greece	41,55
Russia	37,69
Ukraine	33,39
Netherlands	16,04
Hungary	14,09
Latvia	11,48
Belgium	9,95
Belarus	7,53
Austria	7,31
Norway	6,38
Iceland*	4,37
Turkey	4,04
Spain	3,18
Sweden	2,31
Republic of Ireland	1,93
Switzerland	1,66
Denmark	1,40
Germany	,24
Serbia	,10
Poland**	,01
United Kingdom	-,56
France	-3,03
Finland	-3,61
Estonia	-5,29
Lithuania	-5,73
Italy	-11,56

** Including Somersby which is Apple Beer Drink in Poland

Cider Is Still Predominantly European

Regional Share of Consumption, 2018*



Global Cider Volumes

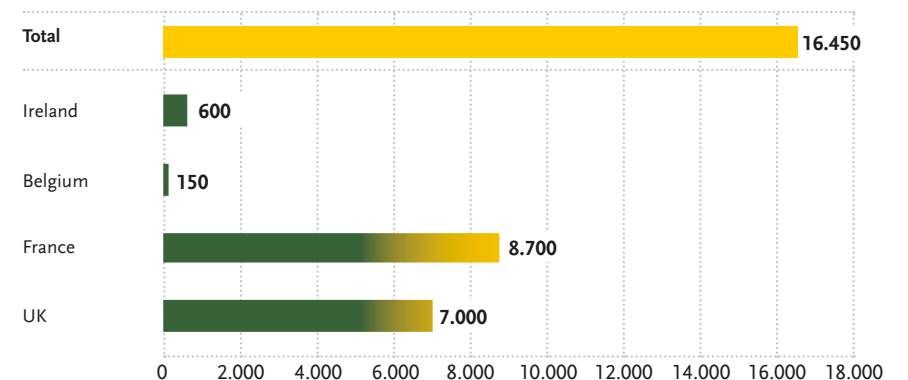
	2011	2012	2013	2014	2015	2016	2017	2018
Volume Th Hectoliters	19.289,49	20.223,95	21.801,66	23.030,52	24.211,09	24.805,65	26.161,65	26.276,42

* Data for smaller markets is a forecast

Agriculture

More than 1.000.000 tons of apples were processed for the cider industry in 2018, which accounts for 7.6% of the overall apple crop used for cider making. Around 485.000 tons were specific cider apples. They are grown mainly in the UK, France, Ireland and Belgium. Most of these varieties are bittersweet.

Area of Cider Apples Orchards - bush orchards (in hectares)



Excise Duty

Overview standard rates in € / hectolitre valid for a 4.8% abv beer, and for a cider with 5% abv non-flavoured, non-sparkling

	Beer 4,8 % ABV	Cider 5% ABV	Wine (still) 13% ABV
Belgium	24,00	24,00	74,91
Spain	9,96	0,00	0,00
France	37,10	1,33	3,78
Ireland	112,75	94,46	424,84
Italy	36,24	0,00	0,00
Netherlands	37,96	44,24	88,30
Portugal	20,89	10,44	0,00
United Kingdom	107,89	45,66	326,45
Sweden	105,15	141,38	272,55
Lithuania	35,55	65,46	164,67
Finland	177,75	187	383,00
Estonia	41,50	84,41	123,18
Denmark	37,64	71,75	156,01
Bulgaria	9,20	0,00	0,00
Czech Republic	14,77	0,00	0,00
Germany	9,44	0,00	0,00
Greece	60,00	0,00	20,00
Croatia	26,67	0,00	0,00
Hungary	26,01	31,69	0,00
Austria	24,00	0,00	0,00
Poland	21,67	22,48	36,63
Romania	8,63	0,00	0,00
Slovakia	17,94	0,00	0,00
Malta	23,16	0,00	20,50
Luxembourg	9,52	0,00	0,00
Latvia	22,50	64,00	78,00
Cyprus	30,00	0,00	0,00
Slovenia	60,50	0,00	0,00

Source: European Commission Excise Duty tables as at 01.07.2018
For updates please refer these documents at ec.europa.eu and www.gov.uk.

Social Responsibility

The European Cider and Fruit Wine Association promotes responsible consumption and enjoyment as a cultural/social norm, with a view to preventing and reducing alcohol abuse and related harm. It supports the view that moderate consumption of alcohol is perfectly acceptable but that excessive consumption should be discouraged.

AICV members participate actively in the work of the overall European alcoholic drinks industry in developing best practice in this area.

World Cider Day

As of 2013 we celebrate World Cider Day every 3rd June. With World Cider Day we aim to provide an international platform for cider lovers, cider makers, cider innkeepers and retailers from across the globe. Each can provide and share information on activities and events that they are holding to celebrate World Cider Day in their own countries and in their own language, by directly posting their activities. On this special day, we promote the wide variety and characteristics of cider, we open our doors to welcome consumers into our cideries to enjoy our ciders responsibly. And we learn more about everyone's appetite for cider and how they prefer to celebrate this great drink! More info at www.worldciderday.com



The richness of the European cider market

*National pride
in Cider*

French Cidres

Full bodied and fruity, robust ciders, with strong bittersweet cider apple characteristics. Higher ABV ciders will be dry, whereas lower ABVs will be naturally sweeter. Tannic rather than acidic, medium carbonation or sparkling. Flavoured variants exist. Average ABV from 2 to 4%.

Production style:

Dominantly fresh juice processed from bitter-sweet cider apples. Arrested fermentation or the equivalent.



Cidre



Cidre (Bouché)

German Apfelwein

Classic wine-like cider – pale to light gold, dry, sharp to medium sharp, medium fruity, gently carbonated. Mainly drunk in traditional cider taverns, out of the barrel. Besides, a wide range of flavoured variants and new mixed cider drinks with a fruity and a mild taste are available. Average ABV 5 %

Production style:

Sharp & medium sharp apples fermented mostly to dryness.



Apfelwein



Draught Apfelwein

Spanish Sidra

Exists in 2 product variants:

'Sidra' - a sparkling wine-like cider, very fruity, half dry to sweet, pale to light gold, highly carbonated.

'Sidra natural' – a still cider with some acetic notes and a dry finish.

Must be served by an escanciador! Flavoured variants are not made. Average ABV 4-6%.

Production style:

Made from locally grown sweet apples and some imported bittersweet apples.



Sidra



Sidra Natural

Belgian Cidres

Sparkling wine-like & fruity, pale to light gold with pleasant taste of apples and a hint of pear, medium sweet, highly carbonated.

Mixed apples, some added pears.

Flavoured variants dominate the market.

Average ABV 4.5% - 5%.

Production style:

Fermentation to dryness, sugar permitted for sweetening.



Cidre



Flavoured Cidre

British & Irish Ciders

Typically medium bodied ciders and perries with strong cider characteristics and medium carbonation, though niche producers encompass styles across the spectrum.

Refreshing and widely appealing.

Flavoured variants exist.

The strength of cider and perry can be as high as 8.4% ABV but only occasionally; the typical strength range is from 4.5% to 5% ABV.

Production style:

Typically bitter-sweet cider apples fermented to dryness and sweetened after fermentation.

Cider



Pear Cider / Perry



Scandinavian Ciders

Ciders with pronounced fruit character. From dry to very sweet ciders, pale, widely appealing with medium carbonation.

A wide range of different products is available, including a large selection of flavoured ciders.

Average ABV 4.0 – 4.5% (max 8.5 %).

Production style:

Apple/pear juice is fermented to dryness and sweetened after fermentation. Juice from concentrate is allowed.

Cider or Perry



Flavoured cider or perry



Polish Cydr

Ciders and perries produced mainly from dessert/table varieties of apples and pears, which makes them delicate in taste. Mostly semi sweet, with medium carbonation.

Flavoured variants do not exist.

The alcohol strength of cider and perry can be as high as 8.5% ABV, but predominantly remains at 4,5 % ABV.

Production style:

Fermentation to dryness, sugar permitted for sweetening.



AICV

The European Cider and Fruit Wine Association, formally set up in 1968, with a permanent secretariat in Brussels, represents producers of cider and fruit wine from the following EU member states: Belgium, Denmark, Finland, France, Germany, Ireland, Poland, Spain, Sweden, the Netherlands and the UK. Representation to AICV is either via national trade associations or by direct company participation. Members of AICV include trade associations from the largest cider markets across the EU and represent all major cider makers including Heineken, Carlsberg and C&C. Collectively, this stands for more than 80% of all cider sold across Europe.

The Association has also set up an International Chapter to ensure that cider interests are appropriately represented in a number of global arenas.

The main objectives of AICV are:

- To represent the interests of its members among the EU authorities and institutions.
- To develop any initiative with a view to promoting its industries.
- To constitute a forum for the development of greater cooperation and solidarity among its members.

Members commit themselves to produce cider and fruit wines from fermented fruit juice. This is manifested in the AICV Code of Practice that stipulates:

- Cider and Perry are made from the fermentation of the juices of apples and pears, respectively, without the addition of distilled alcohol.
- Fruit wines are made from the fermentation of the juices of fruit, other than grapes.

The Code of Practice is the industry's response to ensuring that high quality, and innovation, in its products are the foundations for a long life cycle in the market. The AICV is also putting great effort into promoting its quality criteria among countries outside the EU.

AICV Members

Heineken International BV
Carlsberg Breweries A/S
C&C Group Plc

Belgium
 Konings

Denmark
 Danish Brewers Association

Finland
 Finnish Federation of the Brewing
 and Soft Drinks Industry

France
 Syndicat National des Transformateurs
 Cidricoles (SNTC)

Germany
 Verband der Deutschen Fruchtwein- und
 Frucht-schaumwein- Industrie e.V. (VdFw)

Ireland
 Cider Ireland – The Independent Irish
 Cider Makers' Association

Poland
 Polish Wine Council – Związek
 Pracodawców Polska Rada Winiarstwa

Spain
 Asociación Española de Sidras (AESI)

Sweden
 Brannland Cider
 Kopparberg Brewery
 AB Åbro Bryggeri

United Kingdom
 The National Association of Cider Makers
 (NACM)

Observer members

Bevisol, UK
 Bucher Unipektin, Switzerland
 Mosterei Möhl AG, Switzerland
 Yablochny Spas, Russia
 Distell, South Africa.

30th Sept & 1st Oct 2020

GLOBAL CIDER FORUM

FRANKFURT



INDUSTRY EVENT OF THE YEAR

- Insights on industry trends and challenges
- Tasting of ciders from around the world
- Networking with expert cider makers, marketing directors, sales managers, suppliers, ...

www.global-cider-forum.com