



WESTONS CIDER REPORT 2022



Welcome...

Helen Thomas



HELEN THOMAS, Managing Director of Westons Cider & 4th Generation Westons Family Member

Welcome to the 7th edition of the cider report, our annual overview of the cider market, looking back but also looking forward to the year ahead.

My family has been making and selling cider for over 140 years, and in that time the cider industry has gone through many transformational changes and challenges, with many ups and downs. It remains one of the most vibrant drinks categories, with continued innovation offering new products and brands that meet the needs of consumers. At its core, however, is a traditional apple based drink, intrinsically tied to the culture and heritage of Herefordshire and the West Country and it is apple cider that remains the significant share of the category and opportunity for growth.

In the report we set out the main trends that we see across the category and hope it's of interest to all who are involved in the industry. We're looking forward to the year ahead and hope to play our part with this cider report!

Cheers

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MEET THE EXPERTS...



FENELLA TYLER
Chief Executive
National Association of Cider Makers

The last two years have been tumultuous, and consumers have faced a large amount of uncertainty, both in terms of Covid, but also with the broader economic challenges to the cost of living. Consumers are nervous of long-term planning, less confident about hospitality and more able to meet shopping needs online, resulting in further decline of town centres. Consumer impulse purchases are impacted through economic uncertainty and a lack of opportunity to browse.

For NACM, representing cider makers across the UK, the focus is on making sure that the government recognises the importance of cider making to our rural communities, to farming and to tourism. It is really important that the government supports and nurtures the cider industry through what has been an incredibly challenging time.

Following Brexit the government has put in place more support to encourage increased export and this year will be the most important in a generation for cider policy. The Alcohol Structures Review could be a great opportunity to better support the cider industry and encourage innovation, but to do this requires recognition from the government and a structure that supports cider making. The industry will need to unite and shout loudly to ensure that our voice is heard and our needs are met. Cider making is such a wonderful part of our rural communities, providing employment, supporting farming and attracting tourists. As a relatively small category, we quickly react to change and we need the government to recognise the importance of cider making and encourage innovation and category growth for the long term.

The Alcohol Structures Review is a once in a generation opportunity to create an environment that supports cider making, farming and the rural economy, so we need to join together and make sure that our politicians recognise the need for an outcome that is fair and positive for cider makers, supporting growth and innovation, encouraging investment and category growth.



ALEX HEFFERNAN
Senior Insight Manager IRI

OFF TRADE INDUSTRY OVERVIEW

Premium and craft ciders have continued to outperform mainstream cider in the off-trade, and we expect this to continue as we head into a year where shoppers really feel the pinch and look to manage spend. This may seem like a threat to premium cider, but the trade down from pubs and bars into off-trade premium will outweigh any trade down from premium into mainstream or value cider.

The focus in 2022 needs to be quality, reliability and taste. As promotions de-escalate and prices increase, shoppers will be looking for the biggest return on the pound they can get. This does not necessarily mean buying cheaper options but feeling comfortable parting with money for something that will make them happy. The challenge here is assuring the shopper of this before the purchase, either through a quality product driving repeat purchases or impactful media campaigns. As mainstream cider continues to drive category share decline, we need to think about how space is allocated in-store. Range rationalisation focus will now shift to the alcohol aisle as the country shifts toward the on-trade, with slow selling lines and value drainers being the first to go. Re-evaluating the share of space between premium and mainstream cider to reflect growth areas and rate of sale will be a step toward fending off the growing threat of world beers. This comes with the added benefit of protecting value by trading shoppers up in a time where category volume is in long term decline.

Premium and world beers continue to drive growth and breathe life into the category, making it a key threat to cider. Their success comes from a swathe of different brands with unique takes on flavour and marketing strategies continuously mixing up the in-store fixture, so the category always feels fresh to the shopper with plenty of choice. In cider, the premium brands are performing just as well. However, as the number of brands and takes on apple cider in this tier are limited, the impact does not outweigh the loss from mainstream brands as we see in beer. A challenge for the category is the stuttering performance of fruit cider, restricting the amount of flavour innovation that is possible. Therefore the focus needs to be on quality, reliability and taste.

To close, we do see that the total cider category is challenged year on year, with long term volume decline returning following a Covid-driven off-trade boost. However, this is driven by mainstream and value cider; we see these types of brands losing share in beer too. Premium and craft ciders are still outperforming the market, but the challenge is that we do not see enough brands on shelf or enough space allocated to these ciders.



MEET THE EXPERTS...



CHRIS STERLING
Client Director CGA

ON TRADE INDUSTRY OVERVIEW

Following Freedom Day, it is clear that the last two years have left some indelible marks on the on trade. One strong trend that has been sped up is the use of technology and digitalisation in venues. 46% of consumers in CGAs July Pulse stated they would prefer to use technology to book order and pay. A second important trend is localization, as 70% of consumers are planning to work from home more, combined with 80% of consumers initially planning to visit venues within 20 minutes traveling; this will give urban and neighbourhood pubs opportunities to capitalise on those after work social occasions.

For cider, like a lot of categories, re-engaging with their consumers will be crucial. We know the importance of the on trade in driving trial and creating brand loyalty. So, looking to provide consumers with a premium experience with your brands will be important, as this is evident with the success we've seen with cocktails since reopening. There is a greater emphasis on sustainability and local/UK produce from consumers in the post Covid/UK market, so the local nature of cider and the sustainable credentials of home-grown ingredients is something that should be communicated to consumers. Given the increased consumption and its strong association with summer, the alfresco occasion will be another opportunity and striving to be dominant in this area post Covid can improve what is a strong sales period for the cider category.

Given the closures we have seen it would be easy to be pessimistic about the on trade and its future, there are however reasons to be positive, 42% of Business Leaders stating they plan to open new sites in the next 12 months (Business confidence survey Q4 2021 CGA & Fourth). For the consumer there is a similar positive story with 70% feeling more confident about visiting the on trade and nearly 20% planning to visit the trade more often. There is even reason to believe people want to enjoy themselves more than before with 68% saying they will "live for the moment mindset". So despite the almost two years of very fractured trading there is real reason to believe the trade can bounce back.



CALLUM MATTHEWS
Client Executive
Kantar Worldpanel

With many still feeling the impacts the pandemic brought with it and inflation rates rising, the nation is polarising between the 'haves' and 'have nots', those who are feeling the financial pressure and those who are comfortable. As a result, there will be cider shoppers who will be adjusting their spending whilst others will continue purchasing as they have done. Cider producers will have to consider how their shoppers are being impacted and asking themselves whether their portfolio is catering to the growing disparity in shoppers' financial situations.

Despite the backdrop of growing inflation, Christmas highlighted consumers are still willing to treat themselves and purchase into premium brands and categories to make it a special celebration. Translating this into the on trade and knowing that since the on trade re-opened occasions have become heavier and less frequent, providing consumers with a premium offer and a chance to treat themselves when they do venture to the on trade should be a focus.

Pairing foods alongside alcohol and soft drinks became more prominent in 2020 as consumers started to make more effort with food in the home, as well as consume more drinks in the home. Almost two years on and this has continued to grow with our latest data showing that the share of alcohol serves in the home consumed alongside food peaking at 70%. With food becoming ever more present alongside beverages it means the drink industry has an opportunity to highlight their brand and its versatility with complementary food-pairings, whether that be at formal meals or as a drink alongside a snack.

No and low alcohol has been around for a while, and whilst alcohol has struggled to annualise on the exceptional pandemic year, no and low has continued to gain traction and grow its share. Cider over trades within no/low and as the wider category has grown so has no and low cider. Consumers are increasingly adopting non-alcoholic alternatives as a method of moderation and with the number of shoppers engaging with the category increasing so is the shelf space retailers are offering. Providing shoppers with no and low variants of their favourite brands is a great way of retaining your shoppers spend and adapting with their changing behaviours and preferences.



MEET THE EXPERTS...



ROSS PERCY
Trading Manager Beer,
Cider & Snacks
Molson Coors Beverage
Company

Within the on trade, premiumisation has accelerated across all categories. As it's the younger generation which are more comfortable (& regularly) visiting the on trade again their new entry level across BWS is premium, and mainstream brands are seeing this as a real challenge. Taste is becoming increasingly important as drinkers have become used to higher taste profiles & ABV while drinking at home and occasionality has been impacted by this, together with volume.

An opportunity for cider is to elevate to a more premium positioning, differentiating itself by authenticity and provenance. By occupying the super premium space and broadening it's occasionality, mirroring Prosecco for example to offer a celebratory and sharing experience. The core brand support should be focussed below the line in-outlet and centre around experience. For example, quality liquid and quality at point of purchase and representation on the bar. The key will be reinforcing this at both the outlet and consumer level.



MARCUS BEWLEY
Procurement Manager Beer & Cider
Mitchells & Butlers

During lockdown there is clear evidence that consumers traded up across all drinks categories. This trend carried forward to the on trade on reopening with key premium categories showing strong growth at the expense of mainstream products. There is clear momentum behind world beers, cocktails and premium spirits that looks set to stay.

For cider, taking advantage of the premiumisation trend is key. Making the cider category more accessible and appealing to the drinkers by communicating cider in different ways. That can be leaning on brand heritage or through innovation in branding and communication to consumers. Showcasing varietal styles, refreshed or modern branding alongside serve innovation in the on trade, demonstrating that cider is more than mass market liquids that work across many different on trade occasions. In outlet, the growth in number and use of ordering apps is a great communication opportunity for brand owners to talk directly to guests. Being able to get key brand or product information literally into peoples hands is invaluable and a great way to influence habitual purchasing habits.

Craft beer is an obvious category to learn from, from a positioning aspect but not a direct model to follow as cider has a strong traditional following that can't be left behind or alienated. The emergence of the low and no beer category has demonstrated that traditional, established brands as well as new modern entrants can co-exist and meet a need for different flavour profiles or brands whether in fridge or on the bar. This ultimately benefits the overall category, driving growth and value.



MARIANNE AITKEN
Category Buying Manager Beer & Cider
Tesco

Premiumisation continues to be a key consumer trend, with customers trading up to more expensive pence per litre products. Quality is now becoming more important than quantity which is positive given the off trade price differential versus on trade being so significant. We continue to focus on 'drinking better cider' as one of our key objectives. With rising cost pressures, customers disposable incomes are going to be impacted so we need to continue to offer them great value in the premium sectors to ensure we continue to drive the 'trade up' behaviours we have seen throughout the pandemic.

The growth in no and low alcohol also continue to motor on with a second year of double digit growth after an amazing year in 2021 - giving consumers options when they are moderating their alcohol intake and ensure they feel included in any occasion is really driving this area and we anticipate this will only grow in trajectory over the next few years.

Driving penetration in cider and recruiting younger shoppers is always a challenge for cider - we have some great craft and premium range ciders so driving trial will be key. Whilst we have seen flavour trends across cider over recent years the biggest opportunity for both retailers and suppliers is driving 'Apple' - it's the biggest segment, it's showing growth and we have the opportunity to drive the premium trend through this section so lots to go after!

As mentioned, low and no is a big growth area and minimal participation from key cider brands - it is a missed opportunity. There is also opportunity to remove the stigma on cider being a low quality, high ABV product - the emergence of craft cider and driving meal occasions for cider to be seen not only as a 'session' drink and more of an every day alternative to other options.

WIDER MARKET CONTEXT

This year, more than any other year, it is important to factor in the current economic conditions and the affect they may have on the cider market in the coming year. IGD has reported that shopper confidence is the lowest it has been at any point in their data. It is thought this may fall further given that the full effect of rising prices is yet to be felt.



OVER TWO THIRDS...

of adults (69%) reported that their cost of living had increased (66% in the previous period, 62% when we first asked this in the period 3 to 14 November 2021); among these adults, the most common reasons reported for this were an increase in the price of food.

29% of households voiced real concern about their financial security and this equates to 8 million homes in Great Britain, these people are worth £32 billion of grocery spend.

Once inflation moves into the 3-4% band there is a greater than 2/3 chance that shoppers cut spending. Households 'saving money' is when average household spend growth is less than the rate of inflation. Ways to avoid paying the inflation rate (of like-for-like price rises) include buying more on promotion, choosing cheaper products, shopping in a cheaper retailer or even buying less volume.

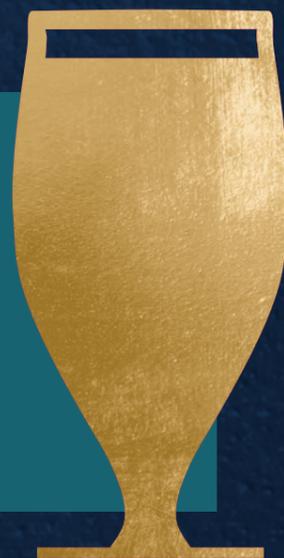
AROUND TWO IN TEN (19%)...

of adults reported they had found it very difficult or difficult to pay their usual household bills in the last month, compared with a year ago; looking at this by age group, this proportion appeared to be highest among those aged 30 to 49 years (27%).



In total, the UK purchased almost **667 million litres of cider last year**, a decrease of 2.6% compared to 2020

The revival of the on trade had a greater impact on value than on volume due to the higher £/L. The **on trade averages £7.10** (up from £6.88/ltr last year) compared to **£2.31 in the off trade**



Headlines...

Cider is worth **£2.32 billion**, an **increase of 11.0%**

In last year's report, across 2020, the on trade accounted for 37% of cider value and 17% of cider volume. After a year of relaxing restrictions, we have seen a rebalancing, the on trade now accounts for 50% of value and 24% of volume.

For comparison, pre-Covid, in 2019, 783 million litres of cider was purchased worth £3.1 billion. The split between channels then, was 65%/35% value weighted to the on trade, with 62%/38% volume in favour of the off trade. This approximate dynamic of 2/3 value in on trade with 2/3 volume in off trade, was present for the last decade in the UK and it will be interesting if it returns to a similar position this coming year.

OFF TRADE vs ON TRADE

CIDER VALUE SHARE



CIDER VOLUME SHARE



TRENDS

YEAR OF THE APPLE

PREMIUMISATION



Drinking better, but less – consumers are willing and want to drink and eat better. This long term trend exists within drinks more broadly, but this continues within cider. Volume will recover in 2022 to near 2019 levels overall, but we predict value growth for both the On and Off Trade channels.

BOOMING CRAFTED & PREMIUM APPLE CATEGORIES



In both channels crafted and premium apple cider sub categories have gained share and have been some of the only categories that have offered growth.

CLOUDY CIDER ESTABLISHED



Contemporary modern style cloudy ciders have seen several years of growth and now represent 8.4% of on trade and 6.6% of off trade cider value. Consumers have found this style of cider, which is generally slightly sweeter and has perceived associations of being crafted, authentic and unfiltered, which is bang on trend.

FRUIT STABILISATION



For several years, the growth of fruit cider has been slowing, and in some instances it has reversed. We now see this as a stable category within both the on and off trade, with approximately one third of the volume. Very little opportunity for significant growth.

NO & LOW CIDER CONTINUES GROWTH



Coming from a low share base, 6% of consumers now engage within no & low cider. A wide choice is now available from most brands in the market, and a must stock for apple and fruit in any channel or outlets. Expect value growth to continue, as volume per buyer increases, but year on year the number of no & low shoppers is stable.

ON TRADE CIDER RESET



After several years of challenging trading conditions, the 2022 cider summer will have an element of reset. As a backdrop, there will be a reduction of outlets, and as the on trade recovers, it will undoubtedly not return exactly to the pre-Covid cider dynamics. New ranging recommendations can be expected, with the balance of draught taps and packaged even more key for outlets to get right.

OFF TRADE NEW SUB-CATEGORIES CHALLENGED



While innovation is needed to offer newness for consumers, over the last few years it's been interesting to see what has resonated with shoppers. The rosé category was well supported by all cider makers and retailers, but has a small share, and now offers little growth as a segment. Citrus also, was a shining star, but has declined into a niche smaller sub-category.

UNDERSTANDING CIDER DRINKERS

In the last decade, we have seen the broad segments of apple and fruit are a helpful and established way of categorising cider.

While we have to be careful not to be lazy and over-generalise the types of drinkers within each segment, in this section we have used the BrandVue Drinks consumer panel, to identify and explore what the noticeable differences and likelihoods between apple and fruit drinkers are.

WHEN LOOKING AT APPLE & FRUIT CIDER DRINKERS...

GENDER

Apple is male-heavy, and fruit cider drinkers are most likely to be women, making cider overall balanced in gender terms



AGE

Cider drinkers are younger than average – this is driven by fruit cider (45% of drinkers are under 35) but a sizable group of apple drinkers are young (37%). Where they differ most is by life stage – apple cider drinkers are most likely to be post family (over 40, kids left home), fruit cider drinkers a pre-family



CHANNEL

Cider is more likely than average to be an on trade occasion. 61% of alcohol occasions are at home but only 55% of cider occasions are



LOCATION

15% of Londoners say they drink apple cider, with only 12% saying they drink fruit. Fruit's stronghold relative to apple is in the North West



OCCASIONS

They are less likely to be a spontaneous occasion and cider over indexes on the mid-week, and more likely to be refreshment and thirst quenching occasions



SPORT

Apple cider drinkers are more engaged in sport than fruit cider drinkers, but not by much: over one in four fruit cider drinkers watches football

And what about those who drink both apple cider and lager? They are understandably the most male audience, but not exclusively so. 38% are women. They are the oldest cider audience – so are not massively engaged on social media – and they love sport. So they look like a normal pub-going audience – not an unusual group that have somehow bridged the divide between the categories

HOBBIES

Cider drinkers are more likely to go out to pubs and bars than the average consumer, but they do balance this with going to the gym (18% say they do this). Hiking is one of the top 5 activities reported by apple cider drinkers (35% of apple cider drinkers say they do this)



Savanta:

OFF TRADE OCCASIONS

OCCASION



The number 1 off trade cider occasion in 2021 was a quiet night in, however this is down 4.2 percentage points since last year as people feel more comfortable mixing with others.

On the whole the split of occasions is similar to last year with regular / everyday drink and staying in as a couple rounding out the top 3 cider drinking occasions. In 4th, planned sociable occasions grew by 1.0 percentage point compared to last year.

	12 m/e 31/12/2021		12 m/e 31/12/2021
OCCASIONS	100	Special celebration	5.2
Quiet night in	17.4	Rounding off the evening	4.7
Regular/everyday drink	15.1	Friends/family unplanned	4.6
Staying in as a couple	11.4	A drink before going out	3.7
Planned sociable occasion	8.3	Barbecue/picnic	3.2
None of the above	7.3	Big night in	3.1
Catch-up	6.8	Outdoor event	2.9
Drink after work	6.3		

MOTIVATION



To wind down or chill out continues to be the number one off trade cider drinking motivation.

This has decreased 6.7 ppts perhaps reflecting a less stressful year, this motivation has also decreased in the on trade so it's not just that consumers are now visiting the on trade to wind down. Recent years have made people appreciate those close to them more and it is heartening to see that to spend quality time as a motivator has increased 1.5ppts. This camaraderie is also reflected in 'to feel part of a group' which is up 1.4ppts.

	12 m/e 31/12/2021		12 m/e 31/12/2021
MOTIVATIONS	100	To refresh	6.5
To wind down or chill out	23.7	None of the above	6.2
To spend quality time	12.5	To bond with others	5.3
To have a laugh	9.6	To let go	5.1
To treat or reward myself	8.7	To feel part of a group	4
To have time for myself	8	To recharge or invigorate	3.6
To have a break	6.9		

GROUP STRUCTURE



More than half of cider serves are in a mixed group.

This group structure has seen the biggest change year-on-year, gaining 6.2 percentage points, having been 44.1% of serves a year ago.

Mixed sex pair is the next most popular group structure showing that cider is a popular date night choice.

	12 m/e 31/12/2021		12 m/e 31/12/2021
GROUP STRUCTURE	100	Mixed Sex Pair	18
Male Alone	12.7	Male Group	4.3
Female Alone	3.1	Female Group	2.4
Male Pair	7.2	Mixed Sex Group	50.3
Female Pair	2.1	To feel part of a group	4

WITH FOOD



Cider serves with food have increased yet again with 74.7% now with some form of food. This is up from 70.2% last year.

The increase has largely come from formal meals (+2.2ppts) and dinner parties (+3.1ppts). As the cider category has premiumised it is more and more being seen as a quality accompaniment to a meal. With the expected cost of living increases in the coming year it may even be that cider becomes a more affordable alternative to wine to serve with a meal.

	12 m/e 31/12/2021		12 m/e 31/12/2021
FOOD	100	Informal Meal	30.8
Any Food	74.7	Light Snack	21.9
Formal Meal	10	No food	25.3
Dinner Party	12		

ON TRADE OCCASIONS

OCCASION



A “sociable get together” remains the leading on trade cider drinking occasion at 16.6% of all on trade cider serves.

Despite a marginal increase vs 2020 it's downward trend continues and is significantly less than the 20.5% of all cider serves in 2018. “Special celebration” (-1.8ppts), “drink after work” (-1.4ppts) and “regular/ everyday drink” (-1.4ppts) suffered the most significant losses as Covid restrictions worked their way through in terms of social gatherings and homeworking. Occasions became more planned as opposed to frequent and spontaneous. “Break from work” and “part of another occasion” saw the greatest increases, up 2.3ppts and 1.9ppts respectively. Homeworkers, once hospitality restrictions eased, were keen to escape and experience out of home social interaction again, particularly locally.

	12 m/e 31/12/2021		12 m/e 31/12/2021
Sociable get together	16.6	Live event	4.2
Catch up	10.9	Break from work	4.1
Quiet drink	8.7	None of the above	4.1
Going out as a couple	6.9	On a date	4
Part of another occasion	5.8	Big night out	3.4
Family occasion	5.7	Going clubbing	3.3
Drink after work	5.5	Business drink/meal	3.3
Special celebration	5.4	Out on the pull/chatting up	2.6
Regular/everyday drink	5.4		

MOTIVATION



“To have a laugh” once again tops the table as the highest motivator.

At -3.7ppts vs 2020 this is significantly down year on year, potentially due to the restrictions which remained in higher tempo, late night music and dance venues.

Emphasis has switched to “spending quality time” +1.2ppts, “to let go” +1.3ppts and significantly “to re-charge or invigorate” +1.8ppts as the mood switches to more personal, self-care motivations.

	12 m/e 31/12/2021		12 m/e 31/12/2021
To have a laugh	12.7	To refresh	7.8
To spend quality time	11.3	To feel part of a group	7.8
To wind down or chill out	11.2	To have time for myself	7.4
To bond with others	9.6	To let go	6.7
To treat or reward myself	8.5	To recharge or invigorate	6.2
To have a break	8.1	None of the above	2.7

GROUP STRUCTURE



Group structure has seen the greatest swing over the past twelve months.

“Without children” still remains the largest % serves at 67.5% but this is down -9.1ppts as more occasions with “children present” has increased +9.1ppts to a third of all % serves, indicating a longer term trend of more planned social and family occasions.

	12 m/e 31/12/2021		12 m/e 31/12/2021
No Children Present	67.5	Male Pair	4.1
Mixed Sex Group	42.6	Female Group	3.1
Children Present	32.5	Male Alone	2.5
Male Group	9.1	Female Pair	1
Mixed Sex Pair	5.1	Female Alone	0.1

WITH FOOD

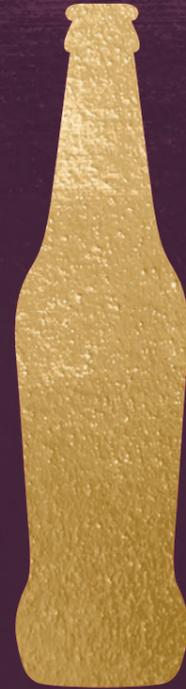


The % cider serves with food has once again increased year on year, up +6.2ppts vs 2020 to now divide the category virtually 50:50.

Snacking remains the highest share with over 36% of serves now in this category but the clear opportunity is to extend into more formal and substantial meals with the potential to increase average dwell time and spend per visit.

	12 m/e 31/12/2021		12 m/e 31/12/2021
No Food	50.1	Light Snack/Bar Snack	10.5
Any Food	49.9	Restaurant Meal	7
Sandwich/Baguette/Panini	14.2	Bar Meal	6.3
Crisps/Nuts/Bagged Snacks	12		

Off Trade



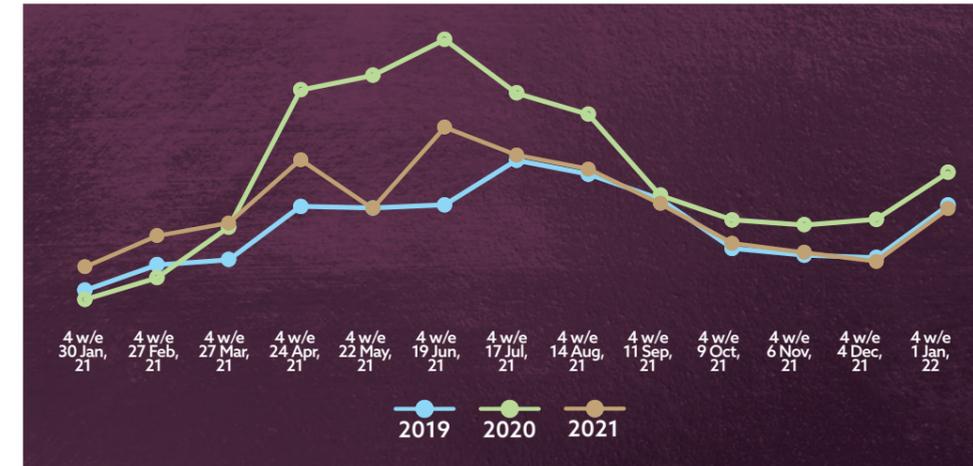
OFF TRADE MARKETPLACE

2021 has been a transitional year for cider in the off trade, between the strong sales seen in 2020 and the expected more normal trading in the coming year.

The first half of 2021 saw value sales still higher than in 2019 whereas as the year went on, and cider shopping behaviours slowly returned to previous levels, sales tracked much more in line with the pre-pandemic levels of 2019.

There are 3 key dynamics to discuss in this section that have characterised the off trade cider market this year:

- #1** A TAPERED RETURN TO NORMAL
- #2** THE SHIFT TOWARDS APPLE CIDER
- #3** THE CONTINUED GROWTH OF THE CRAFTED CIDER SEGMENT



The additional shoppers seen in 2020, the increased average weight of purchase and more frequent shopping for cider have tailed off as the on trade has re-opened. These metrics are still higher than in 2019 but have declined when compared to last year. Penetration peaked at 48.6% during the on trade closure in July 2020 and has slowly returned to the more normal level of 45.4%.

PENETRATION	FREQUENCY	VOLUME
<p>4.8% YEAR ON YEAR</p>	<p>2.5% YEAR ON YEAR</p>	<p>3.5% YEAR ON YEAR</p>
<p>45.4% OF HOUSEHOLDS BUYING CIDER P/A</p>	<p>11.8 SHOPPING TRIPS FOR CIDER P/A</p>	<p>36.2 AVERAGE NO. OF LITRES HOUSEHOLDS BUY P/A</p>
<p>UP VS. 2 YEARS AGO</p>	<p>UP VS. 2 YEARS AGO</p>	<p>UP VS. 2 YEARS AGO</p>
<p>1.8% OF HOUSEHOLDS BUYING CIDER P/A</p>	<p>4.4% SHOPPING TRIPS FOR CIDER P/A</p>	<p>6.8% AVERAGE NO. OF LITRES HOUSEHOLDS BUY P/A</p>

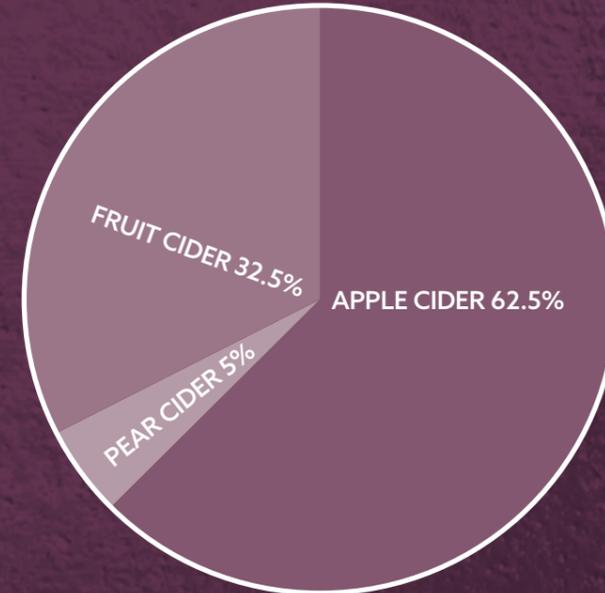
MARKET SHARE BY FLAVOUR

For the cider category, 2021 has been the year of the apple. Apple has increased from 60.4% share of the cider market a year ago, to 62.5%.

Value sales of apple cider have increased 11.4% in the last 2 years, whereas fruit or flavoured cider has increased 2.7% and pear has seen a decline. When compared to last year apple is -8.8% and fruit cider is seeing a steeper decline of -16.6%. Pear cider is -16.3% YOY.



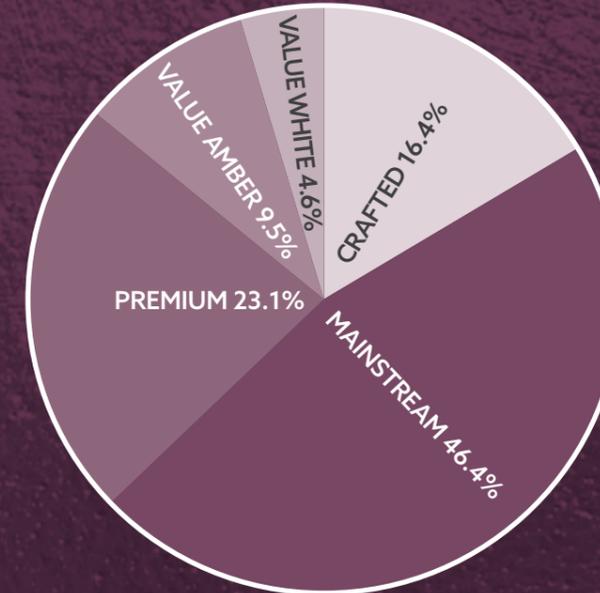
Kantar data shows that apple cider attracts the higher spend, with the apple cider shopper spending on average £81.30 per year. The fruit cider shopper by comparison spends less than half of this at £36.01 a year. The likelihood is the fruit cider shopper is more promiscuous and likely also buys into other alcohol categories, with fruit cider being a part of their wider repertoire of drinks. 31.5% of UK households buy into fruit cider, compared to apple at 25.9%, so although fruit has higher shopper numbers they don't spend as much in the category meaning these additional shoppers don't translate into higher share.



MARKET SHARE BY SEGMENT

Crafted is the most premium of our cider segments with a higher average price than total cider and includes traditional and heritage products.

Crafted has consistently outperformed both total cider and each of the other segments, and as a result has increased in share from 11.6% 2 years ago, to 14.2% last year and 16.4% in the latest data



By contrast the combined value tiers have gone from 17.8% share 2 years ago, to 14.1% share, this decline has been accelerated by the introduction of MUP in Scotland and Wales making these products less affordable. The movements in the premium and mainstream segments have been less dramatic with premium down 0.2ppts versus 2 years ago and mainstream down 0.9ppts in the same time period.

VALUE SALES CHANGE % VS LAST YEAR



OFF TRADE SNAPSHOT

The cider market is worth **£1.2bn, -11.9% YOY**



504 million litres of cider were purchased, **-12.0% YOY**



The big 4 supermarkets account for **60% of all cider sales**, down from 62% a year ago



The average price of cider per litre is **£2.31**, no change from last year



Cider continues to have a SOUTHERN BIAS

...with the 5 most southern TV regions making up 62.4% of cider volume sold

...this is even higher for crafted cider with 76% of volume coming from the south



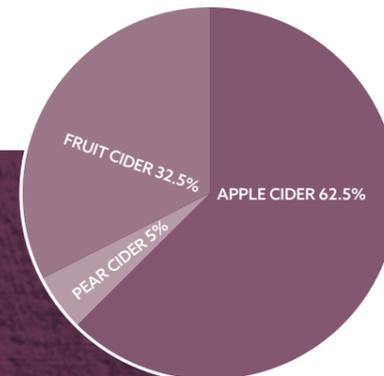
The average household makes **11.8 shopping trips for cider a year**



45.4% of UK households buy cider

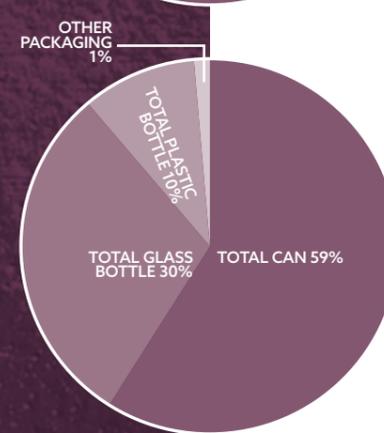


Households in the UK purchase an average of **36.2 Litres of cider per year**, down 3.5% compared to last year



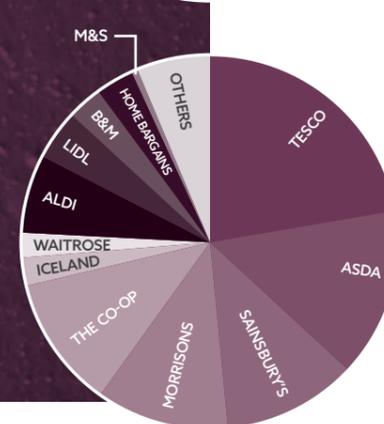
CIDER VALUE BY FLAVOUR YOY

Apple	-8.8%
Fruit	-16.6%
Pear	-16.3%



CIDER VALUE BY FORMAT YOY

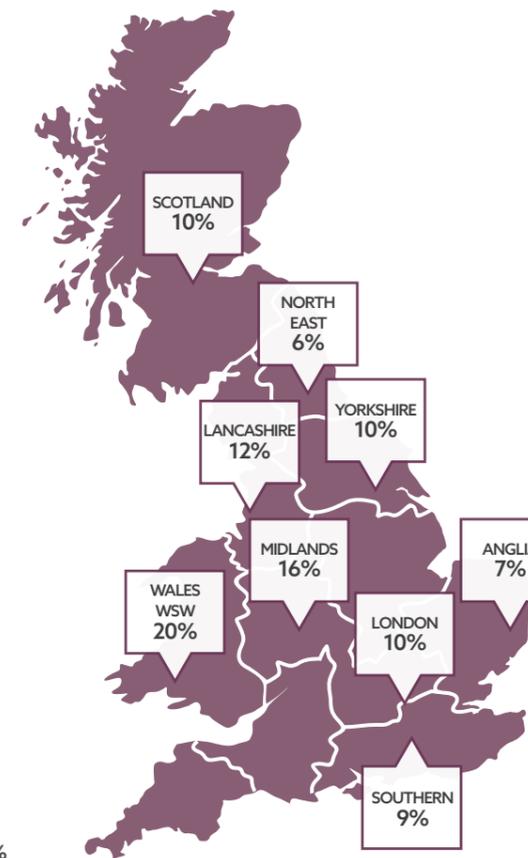
Can	-12.4%
Glass Bottle	-9.4%
Plastic Bottle	-16.3%
Other Packaging	-11.2%



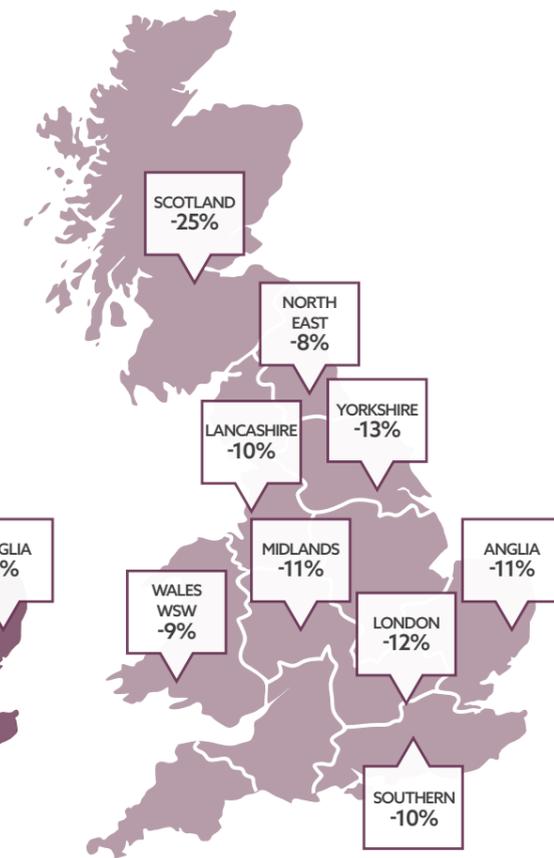
CIDER VALUE BY RETAILER YOY

Retailer	YoY	YoY
Total Cider	-6.6%	3.9%
Tesco	-9.2%	-2.3%
Asda	-8.1%	0.2%
Sainsbury's	-13.7%	27.4%
Morrisons	-8.2%	-6.2%
The Co-op	12.9%	-29.4%
Iceland	-0.1%	
Waitrose	-6.4%	
Aldi	7%	
Lidl	4%	
B&M	3%	
Home Bargains	3%	
M&S	1%	
Other	6%	

% OF TOTAL VOLUME BY REGION



VOLUME SALES % CHANGE VS YEAR AGO



KEY TALKING POINTS



CLOUDY & ROSÉ CIDER

Cloudy cider has continued to gain share and is now worth £77.1M and accounts for 6.6% of cider market value. Sales are down -5.2% versus last year but this is a smaller decline than that seen in total cider. When comparing to 2 years ago, sales have nearly doubled at +95.1%.

Rosé cider has not had quite the same momentum and is currently at 2.8% share of cider, compared to 3.2% a year ago. It might be that it has reached a natural ceiling and will remain a relatively small sub-category with only a few SKUs required in the average cider range. Total rosé sales are £33.1M and are down 22.2% year-on-year.



WHAT NEXT FOR FRUIT?

In last year's report one of the largest product launches was a lemon flavoured cider. The following months saw several other lemon and citrus flavours enter the market. Tracking sales over the latest 52 weeks we have not seen these reach the heights of other cider sub-categories such as cloudy.

Grouping together these citrus flavours they are worth £13.2M in the latest 52 weeks and -14.6% YOY so declining ahead of total cider. Citrus flavours currently account for 1.1% of the cider category. With fruit overall declining it will be interesting to see where future growth is going to come from - whether that be new flavours, formats, or brands.

NO & LOW ALCOHOL CIDER

No and low alcohol cider has gone from a value of £22.8M last year to £28.9M in the latest year. A lot of this 26.7% increase in spend came from an increase in frequency of purchase and volume per trip. Shoppers are now buying no and low alcohol cider 4.8 times a year (+16.6%) and buying 1.4 litres a year (+15.5%). 6.1% of UK households have purchased this category.

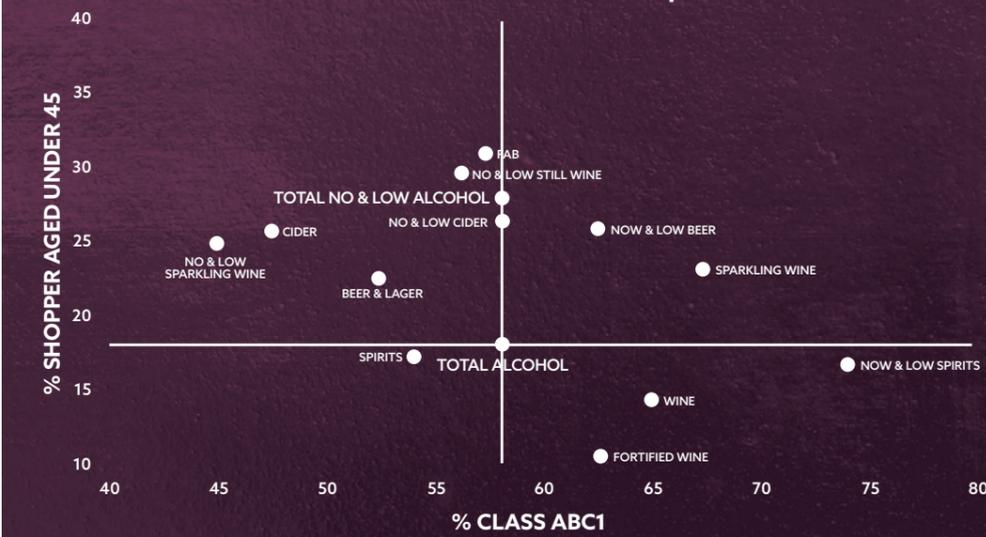
Fruit really over trades in this area and makes up 65.5% of no and low alcohol cider spend. However, apple has gained share of this space in the latest year and now accounts for 24.4% of spend (+7.2ppts).

No and low alcohol cider is still primarily branded products, however own label has gained some share versus last year from 7.7% to 9.4%.

No and low alcohol cider attracts a more affluent and younger shopper than its parent category suggesting that these products are expanding the appeal of cider. 3.3% of buyers only buy no and low alcohol cider and have not engaged with any other cider offering demonstrating the incremental value it is adding.



ALCOHOL SECTORS DEMOGRAPHIC MAP - SPEND % | 52 W/E



Source: Kantar Purchase Panel | 52 w/e data to 26th December 2021

NO & LOW CIDER
ABC1 55%
 Index 117 vs average Cider shopper
UNDER 45s 27%
 Index 105 vs average Cider shopper

OUTLOOK FOR CIDER

We've already in seen in 2022 that there are some significant headwinds facing the UK economy, but also some positives regarding unemployment falling below pre-Covid levels. However, supply chains are being significantly hit with cost pressures leaving very few categories unaffected, and this will undoubtedly hit the price at the shelf and outlet.

POTENTIAL BEHAVIOURS WE MAY SEE IN THE CIDER CATEGORY

We may see shoppers trading down to cheaper mainstream and value cider products more often, balanced with more premium products for a treat or special occasions.

Seeking out big branded cider promotions.

Cutting the volume of cider purchased or buying smaller packs more often to manage the budget, or conversely bulk buying large packs to bring the cost per unit down.

Two years of disrupted on trade drinking could have highlighted to drinkers the difference in price per pint between the 2 channels and one saving strategy could be to switch some on trade occasions for an at-home drink.

On a positive note, cider is one of those categories that could be seen as an affordable treat, so we could even see shoppers trading up and buying premium products to offset having to cut their budget in other areas such as entertainment or travel for example.

Cider could also potentially benefit from switching from more expensive drinks categories such as spirits, pros cco or ready to drink.



This is in no way intended to come across negatively for the cider industry but more to highlight the challenge that volume growth may not be easy to come by in 2022 and that as an industry we will have to be flexible and adapt to changing shopper behaviours.



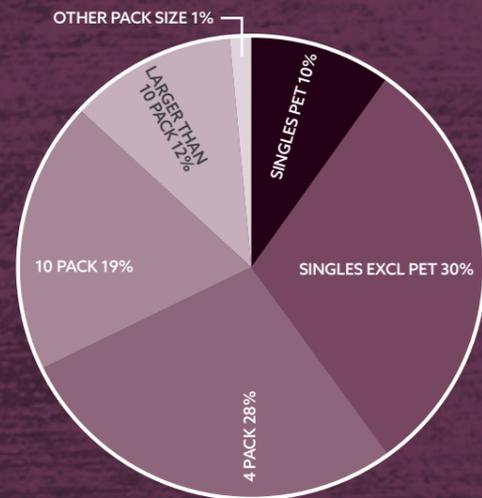
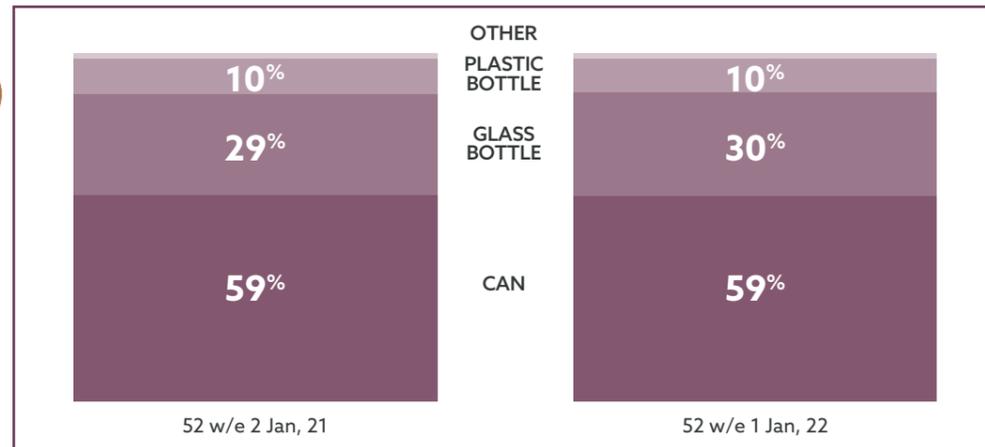
CIDER FORMATS



PACKS

In the latest year all formats reflect total market performance and are seeing a year-on-year decline. Glass bottles have seen the smallest decline at -9.4% and as a result have gained share. Plastic bottles have seen the largest decline in value at -16.3%.

When looking at pack sizes, again we are looking at tough comparisons against a strong year, so there are year-on-year declines. 10 packs have held up best at -8.6% so performing ahead of total market. This has led to them gaining share from 18% of cider market value last year, to 19%. Singles (excluding PET plastic bottles) have also performed better than the market at -10.0%.



OWN BRAND

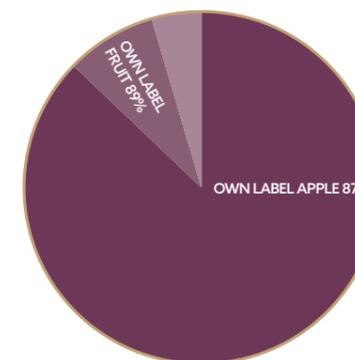


(EXCL THE DISCOUNTERS)

In the past year own brand has maintained share at 6.8% of cider value, with branded products making up the other 93.2%. Own brand is -12.4% compared to branded at -11.9%.

The higher tier offerings have performed well with crafted going from 7% share of own brand last year to 8% this year. Value has gone from 92% share last year to 89%. This presents an opportunity for retailers to evaluate their own brand ranges and look to trade shoppers up from commodity products to products with provenance and heritage.

Own brand is also currently predominantly apple at 89% share. Fruit has gone from 7% share last year to 8% but is still a long way from matching its total cider share of 32.5%.



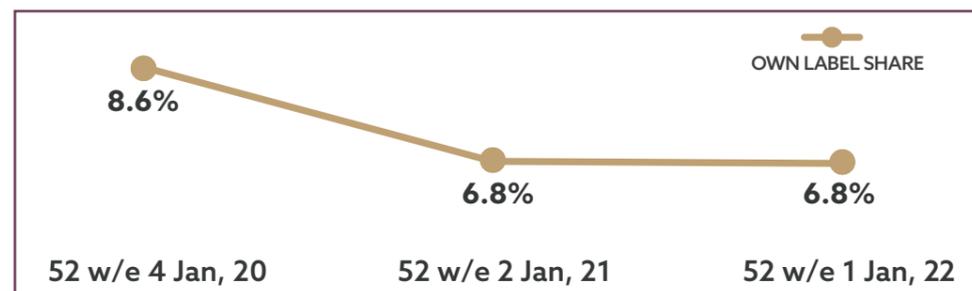
OWN BRAND IN ALDI & LIDL

Aldi and Lidl are not included in the IRI total own brand data, but it is possible to get a steer on the dynamics in these retailers through Kantar. They have traditionally had a strong own brand offering but there are signs of a rebalancing with branded products playing more of a role.

In Aldi own brand has gone from 61.7% share in 2019 to 49.7% in the latest year. Own brand has declined 12.9% year-on-year whereas branded is +28.4%.

Similarly in Lidl own brand has gone from 92.2% share 2 years ago to 81.5%. In the latest year branded sales have grown 5.8% whilst own brand is down 4.0%.

With both retailers seeing branded products driving growth in their cider category, it will be interesting to see if this is reflected in ranges in the coming year.



TOP 10 CIDER MANUFACTURERS



One of the major changes seen in the top ten manufacturers this year is the acquisition of Lambrini by Accolade Wines from Halewood. In last year's cider report Accolade Wines was ranked 9th and is now 7th and Halewood is no longer in the top ten (8th last year). Also, after a year of above the market growth, Westons have moved from 6th to 4th.

The top ten cider makers combined account for 90.8% of total cider value, very little change from the 90.7% seen last year. Heineken continue to be the number one ranked manufacturer with just over a third of the total cider market (33.6%), share has dropped from 36.0% a year ago.

Only two of the top ten have seen growth this year, Westons Cider at +11.6% and Healeys at +28.9%. Heineken and C&C group have declined at a greater rate than the market.

		VALUE SALES	VALUE SALES % CHANGE VS YRAGO		VALUE SALES	VALUE SALES % CHANGE VS YRAGO
#1		£391,875,840	-17.8%	#6		£74,378,424 -10.9%
#2		£176,121,648	-10.5%	#7		£39,416,628 -16.9%
#3		£160,102,624	-3.6%	#8		£38,456,588 -16.9%
#4		£82,599,976	11.6%	#9		£11,804,299 28.9%
#5		£77,439,832	-15.3%	#10		£6,712,078 -33.0%

TOP 10 CIDER BRANDS



The top 5 cider brands have remained the same as last year. However, Henry Westons Vintage, which is the fastest growing brand in the top ten, is now in 6th place having overtaken Magners. Last year Strongbow Rosé was ranked 10th but has moved down to 13th and has been replaced by Lambrini in the top ten.

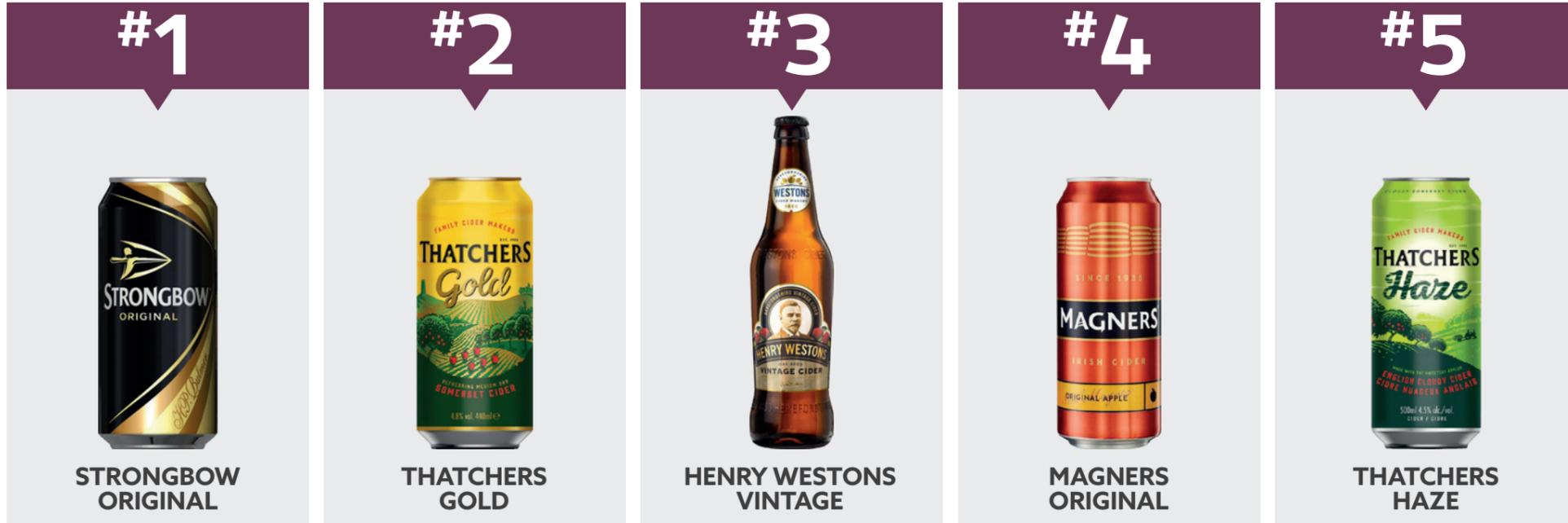
		VALUE SALES % CHANGE VS YRAGO		VALUE SALES % CHANGE VS YRAGO	
#1		-18.6%	#6		20.6%
#2		-19.8%	#7		-16.0%
#3		-1.0%	#8		0.0%
#4		-13.1%	#9		-15.0%
#5		-15.5%	#10		6.3%

(Note: Lambrini back data has been applied to Accolade Wines which is why the acquisition does not appear as a large amount of growth)

TOP 5 APPLE CIDER BRANDS



Apple cider continues to be the largest part of the cider market and has been the strongest performing cider type in the last year. In recent years apple has also increasingly been seen in other drinks categories, big branded examples being Jack Daniels Tennessee Apple liqueur and Captain Morgan Sliced Apple Rum.



Strongbow remains the number one apple cider brand. The only major change in the top 5 compared to last year is that Henry Westons Vintage, due to its strong growth, has moved ahead of Magners. Henry Westons Vintage is the only exclusively glass bottle apple cider, as the other 4 brands are predominantly can led in terms of sales value.

TOP 5 FRUIT CIDER BRANDS



In terms of fruit cider, our top four have stayed the same as last year's report. Old Mout Pineapple & Raspberry is a new entrant to the top 5, replacing Bulmers Red Berries and Lime which is now ranked 8th. All of the top 5 are in double digit decline having tough annualisations against last year.



TOP 5 INNOVATION

Interestingly, in the latest year the largest single gain in the cider category came from an existing brand. Henry Westons Vintage added £10.8M to its value, over £1.7M more than the value of the number one ranked NPD product. Heineken launched Inch's Medium Apple Cider in April 2021 and it is now worth £9.1M and the highest ranked new brand.

In 2nd place we have the one of Kopparberg's 3 Brands in the top 5, Kopparberg Mixed Fruit Tropical Cider. This launched in a variety of pack formats across multiple retailers with the 10 x 330ml can being the best performing SKU.

In 3rd place is Old Mout Watermelon & Lime, this sold primarily in a 500ml glass bottle. The Kopparberg variety pack (330ml x 10 can) is in 4th, and this looks to be an exclusive SKU for The Co-op. Kopparberg Passionfruit rounds out our top 5 and was launched in a 500ml glass bottle and a 330ml x 10 can which was exclusively in Sainsbury's.

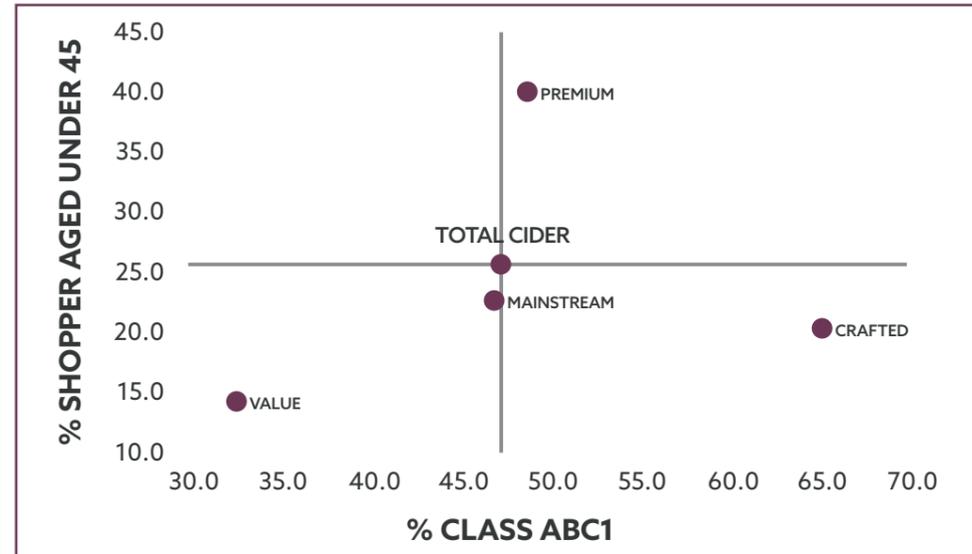
It's evident that tropical flavours were popular in flavoured cider NPD this year with Tropical, Watermelon and Passionfruit all making their way into the top 5.

<p>#1</p>  <p>INCHS MEDIUM APPLE CIDER</p>	<p>#2</p>  <p>KOPPARBERG MIXED FRUIT TROPICAL CIDER</p>	<p>#3</p>  <p>OLD MOUT WATERMELON & LIME</p>	<p>#4</p>  <p>KOPPARBERG VARIETY PACK</p>	<p>#5</p>  <p>KOPPARBERG PASSIONFRUIT</p>
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CRAFTED CIDER

Crafted cider is the only segment in growth in the latest year, taking its share from 14.2% of cider category value a year ago to 16.4%. This segment also has a price per litre of £3.28 compared to the market average of £2.31 so plays an important role in premiumising the cider category.



As you can see in the chart, crafted cider has a distinct demographic position at the top end of the affluence scale, and with a slightly older age profile than total cider. 65% of crafted cider shoppers are ABC1, and 20% are under 45.

The top ten crafted brands represent 82% of crafted category value. Henry Westons Vintage has seen the highest year-on-year growth at +20.6%. Rosé and Cloudy Lemon have seen double digit declines versus last year, with the latter flavour perhaps a reflection of the shift to apple seen in the market.

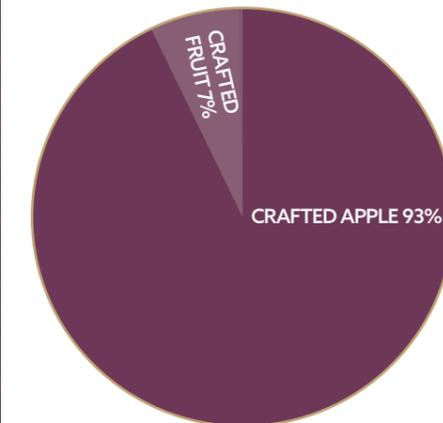
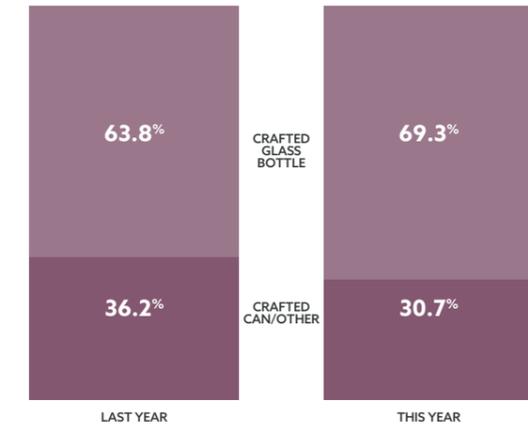


The top ten has remained the same as last year with just some shifts in position. This also means that the top ten still features 3 can-led brands with the rest primarily being in glass bottle.

CRAFTED CIDER BY FORMAT

Crafted cider is still predominantly glass bottles and has become increasingly more so over the past year.

Crafted can / other now makes up 30.7% of crafted sales value, down from 36.2% last year. Total crafted glass bottle is +10.7% year-on-year whereas crafted can / other is -13.6%

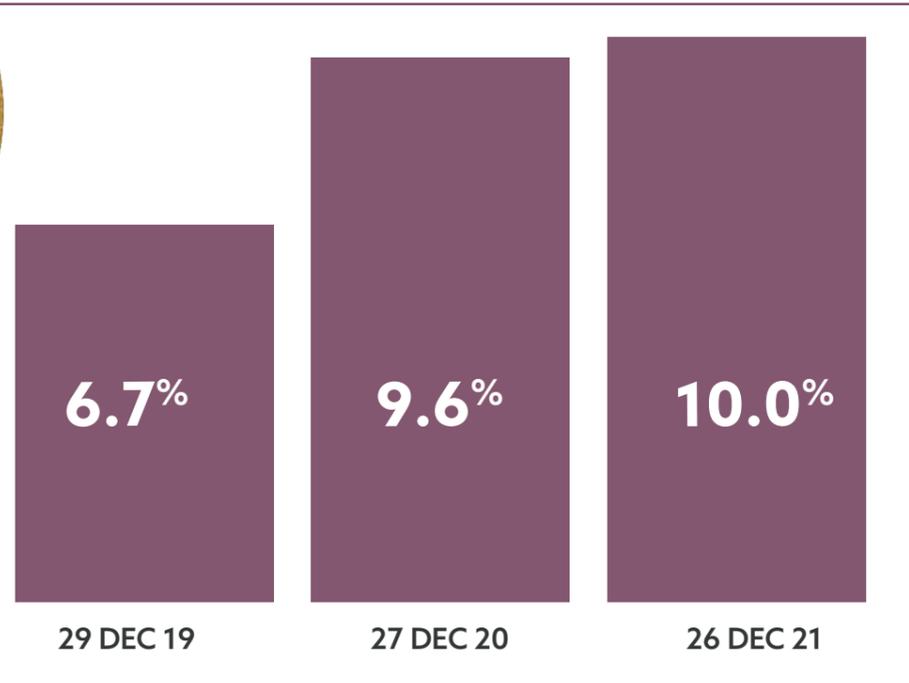
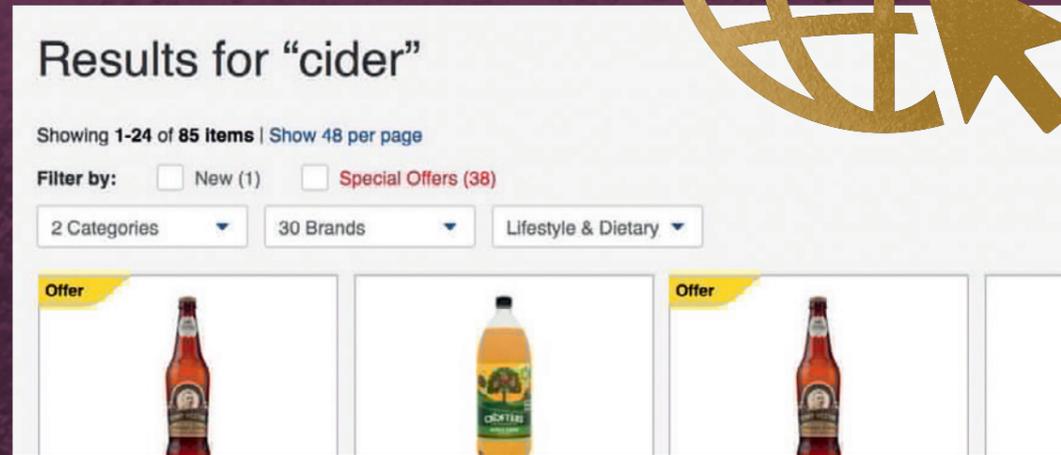


Crafted cider is traditionally apple; and this has increased versus last year from 90% to 93% of value. Fruit share of crafted has gone from 10% to 7%.

CIDER RETAILERS

ONLINE

One of the biggest grocery trends in last year's report was the growth of online shopping. We have seen this growth continue and now online accounts for 10% of off trade cider sales. Sales are slightly down compared to the peaks seen last year but declines are smaller than in total market.



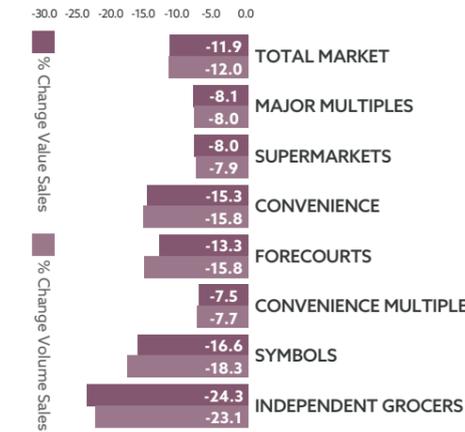
CONVENIENCE



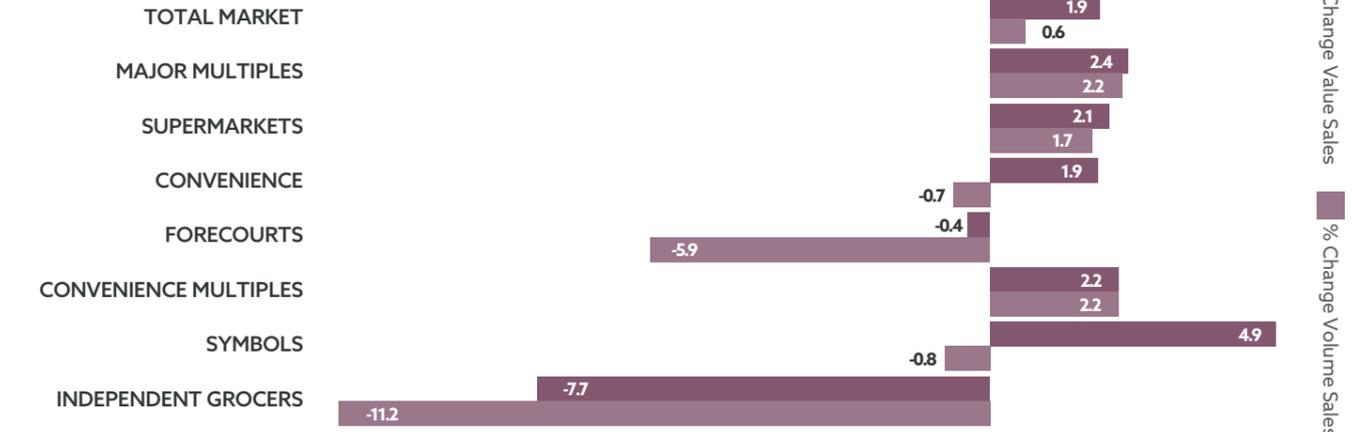
The convenience channel saw a lot of growth in 2020 and as a result has had some big numbers to try and match in 2021. These tough annualisations mean convenience as a whole has seen value down 15.3%, so a larger decline than total market at -11.9% year-on-year.

Within the crafted cider segment however there have still been pockets of growth within convenience. Convenience multiples (e.g., Tesco Express, The Co-op) have seen both value and volume growth in the latest year. In symbols (e.g., Londis, Spar) crafted cider has seen value increase 4.9%. Although crafted is declining in independents the -7.7% performance is well ahead of the -24.3% seen at total cider level. Crafted still continues to offer a growth opportunity for the convenience channel particularly as distribution is at 87% compared to 97% in total market so there is headroom to grow. Crafted is the only segment in growth yet in the independents channel in particular it is at only 62% distribution. Re-balancing ranges in this channel to reflect market performance will play a key part in returning to growth.

TOTAL CIDER



CRAFTED CIDER PERFORMANCE

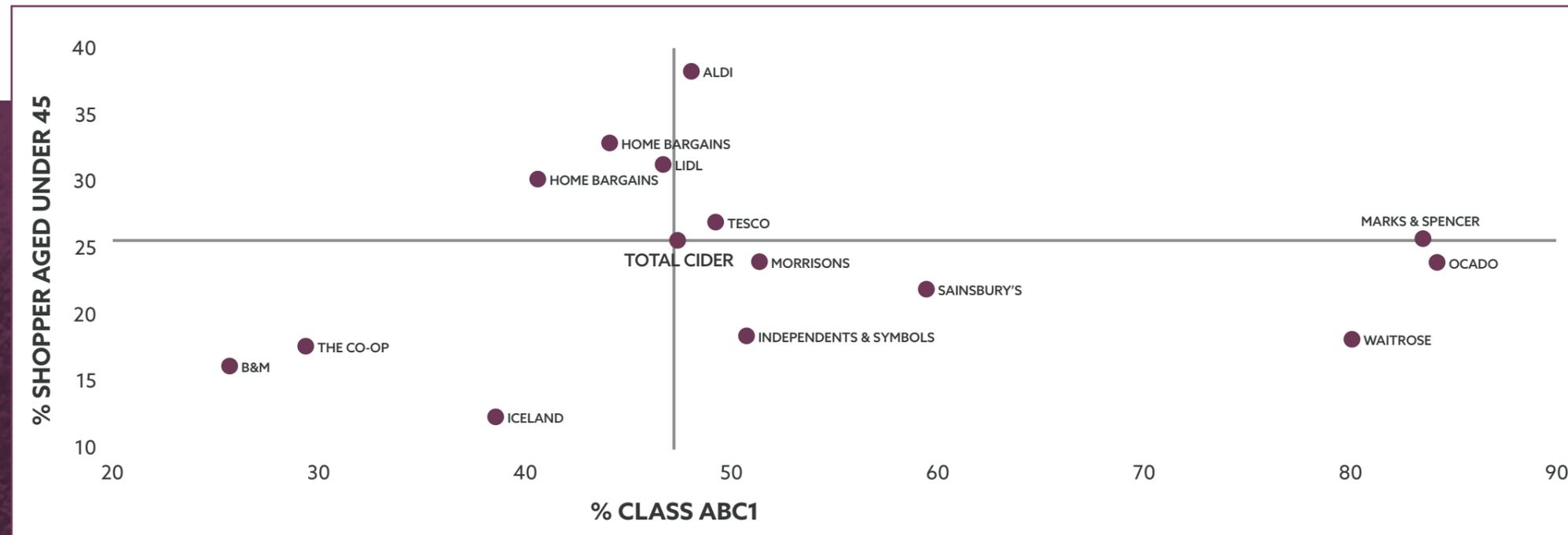


CIDER RETAILERS

CIDER SHOPPER DEMOGRAPHICS BY RETAILER

The demographic profile of the cider shoppers in each retailer forms some interesting clusters. Asda, Lidl, and Home Bargains are grouped together in the top left of the chart with a younger and less affluent shopper.

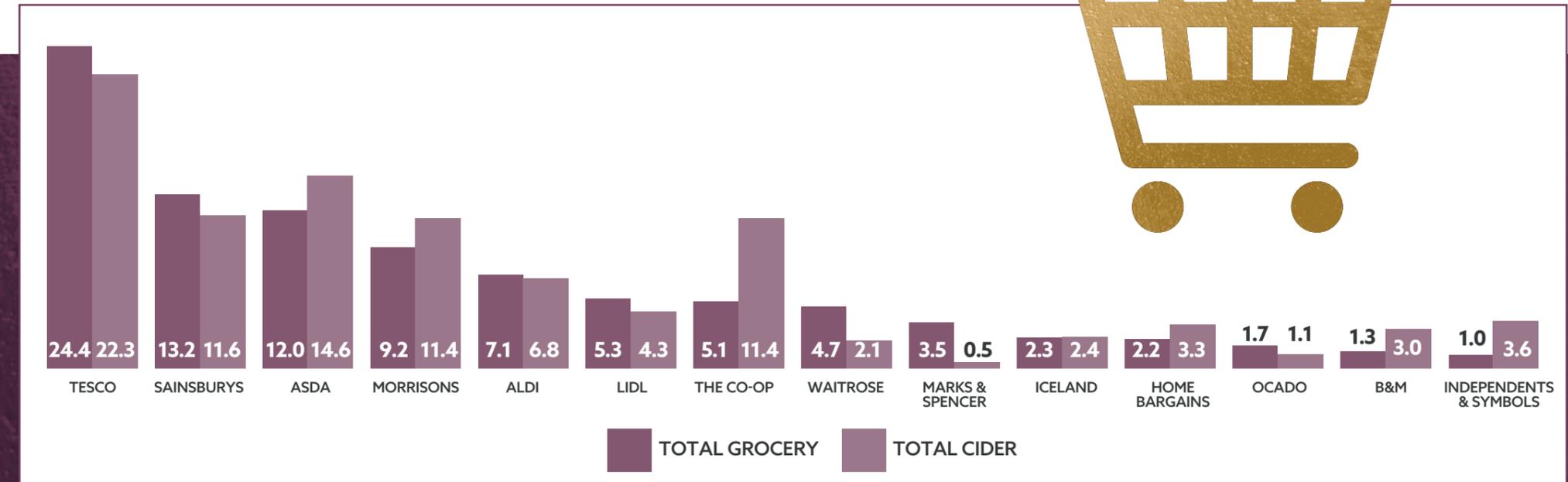
At the bottom left, so older and less affluent, we have The Co-op, B&M, and Iceland. Iceland has the oldest shopper profile with only 12.6% of their shoppers being under 45. Aldi have the youngest shopper cider shopper with 38.2% under the age of 45. Tesco and Morrisons sit centrally close to the total cider average. Marks & Spencer, Ocado and Waitrose are all at the more affluent end of the scale.



RETAILER CIDER MARKET SHARE VS, TOTAL GROCERY SHARE

Tesco is the largest cider retailer with 22.3% share of market spend, this is a slight undertrade compared to their 24.4% share of total grocery. Sainsbury's also undertrades in cider compared to their grocery share. Asda and Morrisons both have a higher share of cider than of grocery. The Co-op significantly overtrades in cider with 11.4% of cider market spend compared to a 5.1% share of total grocery spend.

Home Bargains and B&M also do well in terms of cider share compared to grocery. Both of these retailers have increased their share since last year's report, B&M had 2.7% share and Home Bargains 2.4% a year ago.



OFF TRADE STOCKING RECOMMENDATIONS

RECOMMENDED CONVENIENCE CIDER FIXTURE FOR A 2.5 METRE REFRIGERATED UNIT



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.

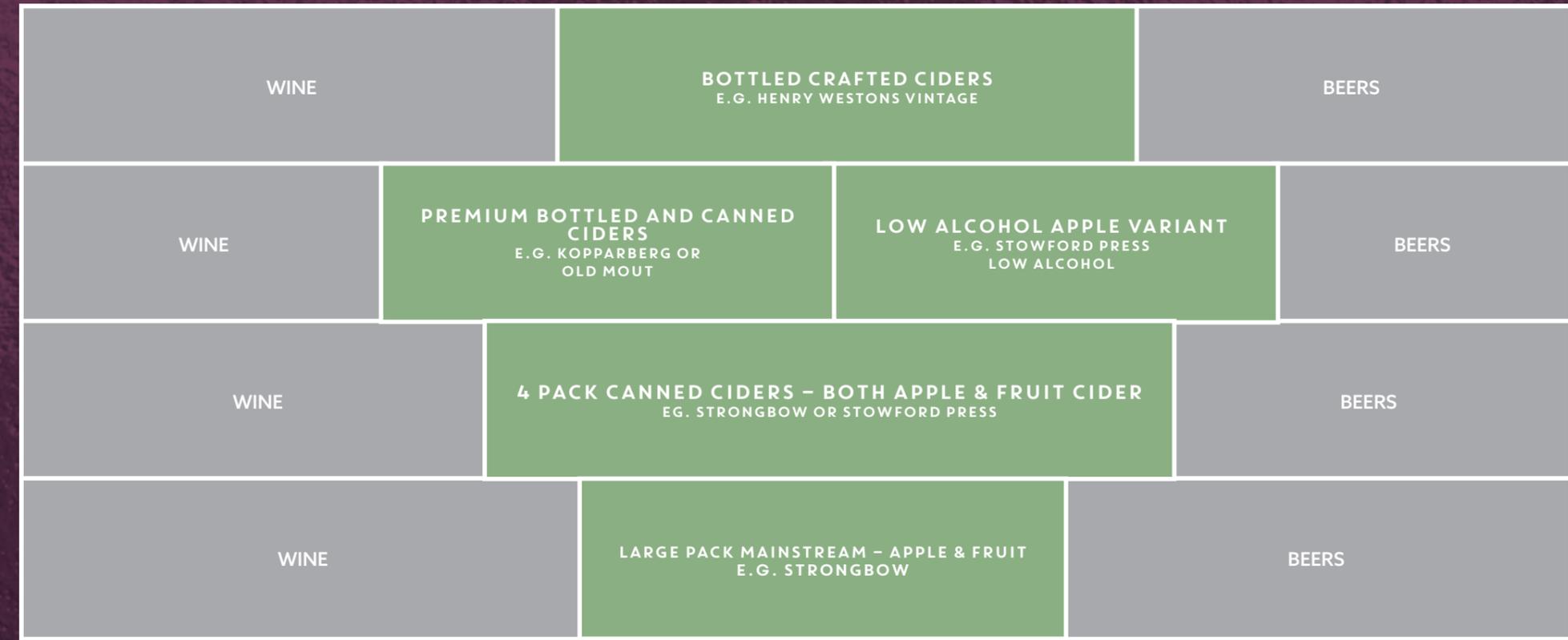
Crafted is the only segment in growth and there is still headroom to grow. The segment is making up 13.6% of value across the convenience channel, compared with 16.4% total market. Distribution of crafted cider is 87% across convenience, compared to 97% in total market. Outlets should be stocking several crafted apple skus, in bottle or can. If the best performing crafted category receives wider distribution across convenience, then this could single-handedly return the entire cider category to growth. In terms of value, crafted averages £3.62 per litre compared to total cider at £2.42 per litre, so can help revenue grow too.

Apple should occupy approx 2/3's of total space within cans (including single cans, pint cans, 4 packs and larger fridge packs). Apple in a glass bottle largely sits within the crafted segment and the consumer would expect some choice here also. Fruit remains stable and the main fruit brands should be stocked, in single bottle or 4 pack can. A rosé or a citrus cider could be included, but shouldn't be over spaced, while both a low alcohol apple and fruit should always be stocked to ensure breadth of choice and that all shopper missions are catered to.

It might be tempting to stock as many options as possible, but sufficient facings should be allocated to best sellers to make sure store staff are not constantly refilling and that key products don't go out of stock.



BEST
BETTER
GOOD



OFF TRADE STOCKING RECOMMENDATIONS



RECOMMENDED FOUR BAY SUPERMARKET CIDER FIXTURE

While supermarkets vary in space available to cider, generally we plan and recommend based on a four bay fixture. Apple cider remains the dominant cider type, and this should be reflected in the ranging with approximately two thirds of the space.

Can formats represent 50% of the market, so choice across 4 packs, 10 packs and bigger value packs is essential. Premium apple is delivered by crafted cider in the bottle ranges, with leading skus offering multi packs. While Rosé has been over stocked lately, one or two skus are still warranted, equally with citrus flavours. No and low options, with both low alcohol and zero options available will all be shopped.

Value cider continues to decline, so should not receive too much space. 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.

Within the crafted segment the consumer would expect some choice here also. Fruit remains stable and the main fruit brands should be stocked, in single bottle or 4 pack can. A rosé or a citrus cider could be included, but shouldn't be over spaced, while both a low alcohol apple and fruit should always be stocked to ensure breadth of choice and that all shopper missions are catered to.

It might be tempting to stock as many options as possible, but sufficient facings should be allocated to best sellers to make sure store staff are not constantly refilling and that key products don't go out of stock.



BAY 1

SINGLE BOTTLED CRAFTED CIDERS
E.G. HENRY WESTONS VINTAGE

SINGLE BOTTLED MAINSTREAM/PREMIUM CIDERS
E.G. BULMERS

4 PACK CANNED MAINSTREAM CIDERS
E.G. STRONGBOW

LARGE PACK CRAFTED CIDERS
E.G. HENRY WESTONS MULTI PACK

BAY 2

SINGLE BOTTLED CRAFTED CIDERS
E.G. HENRY WESTONS VINTAGE

SINGLE BOTTLED MAINSTREAM/PREMIUM CIDERS
E.G. BULMERS

4 PACK CANNED MAINSTREAM CIDERS
E.G. MAGNERS

MULTI PACK MAINSTREAM CANNED CIDERS
E.G. STRONGBOW

BAY 3

SINGLE BOTTLED FRUIT CIDERS

4 PACK BOTTLED FRUIT CIDERS
E.G. KOPPARBERG & REKORDERLIG

4 PACK CANNED CITRUS OR ROSÉ
E.G. THATCHERS LEMON

MULTI PACK MAINSTREAM & PREMIUM BOTTLED & CANNED CIDERS
E.G. BULMERS & MAGNERS

BAY 4

UNIQUE & DISTINCTIVE BRANDS & FORMATS AND/OR WORLD CIDER OPTIONS

NO AND LOW APPLE CIDER

4 PACK CANNED FRUIT CIDERS
E.G. STRONGBOW DARKFRUIT

MULTI PACK FRUIT CIDERS
E.G. STRONGBOW DARKFRUIT & KOPPARBERG

BEST
BETTER
GOOD

On Trade



ON TRADE MARKETPLACE

We leave 2021, following nearly two years of relentless challenges, with some glimmers of hope for hospitality.

A net increase in outlets in the final quarter of +1.6% to 106,880 is the first time in five years that a quarter on quarter rise has been reported. This growth has been seen across all segments of the market but food led, particularly casual dining and bar restaurants and nightclubs, following the return of late-night venues, have seen the greatest growth in sites.

Consumer confidence has also risen considerably to the highest level since pre-Covid, with older age groups gaining most confidence since July 2021.

HOW CONFIDENT DO YOU CURRENTLY FEEL... about visiting pubs, bars & restaurants?



70% of average GB consumers currently feel 'very' or 'quite' confident visiting venues

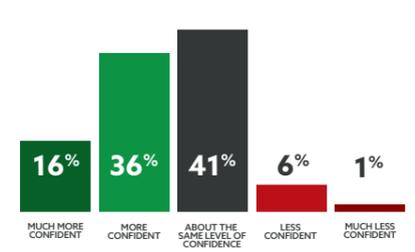
+36pp vs. January 2021
+17pp vs. July 2021

Despite financial concerns, most consumers (56%) plan to visit the trade as often in 2022 as last year, with 1 in 5 planning to visit even more. Of those who've visited the trade, positive experiences have boosted confidence for future visits.

THINKING ABOUT YOUR... visits to pubs, bars or restaurants over the festive period, how did you find your visits?



COMPARED TO BEFORE... December, do you feel more or less confident about going out to pubs, bars & restaurants in the near future?



SINCE THE BEGINNING... of the pandemic in March 2020, net decline in numbers of



THE OMICRON VARIANT AND 2022... has brought further economic, people and supply issues as outlets have faced rising food and energy costs. In tandem with this, outlets have struggled with declining average weekly drinks sales



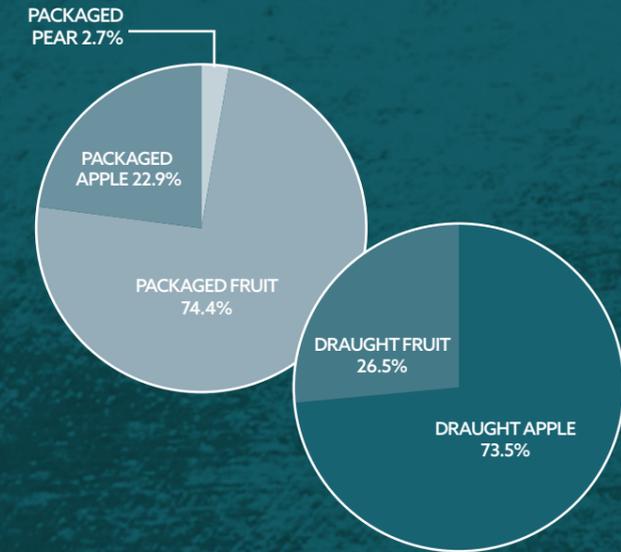
SPIRITS IS THE DRINKS CATEGORY THAT HAS THRIVED THE MOST IN THE POST-LOCKDOWN MARKET, THANKS TO THE SUCCESS OF COCKTAILS AND SHOTS, BOOSTED FURTHER BY THE RETURN OF THE LATE-NIGHT OCCASION IN THE ON TRADE.

Overall vs 2019 both the cider & beer categories have performed very much in line at -43.9% and -41.6% from a volume perspective, but cider has significantly outperformed beer on a % change vs 2020 by +6.1ppts at +46.1% vs +40.0%. Over the past 12 months cider has also seen a marginal value growth as consumers look to elevate their cider choice vs a full percentage point decline for beer.

From a value in January 2020 of £1.97 billion the total UK cider market at 1st Jan 2022 is now valued at £1.15 billion, a drop off of some -41.7%. From a pint for pint perspective value has increased by 7p to £3.71 for the average pint of draught cider.

ON TRADE MARKETPLACE

2021 ON TRADE VOLUME SPLIT (HLS)



Apple has significantly grown share as draught fruit has declined to 26.5% of total draught



Crafted apple is stealing share from mainstream apple



Consumers are continuing to elevate their draught cider choice as share moves from mainstream to more premium brands

GOOD

52.2% OF TOTAL DRAUGHT APPLE
-2.2ppts YoY Average RSP £3.53

MAINSTREAM APPLE

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



BETTER

38.0% OF TOTAL DRAUGHT APPLE
+1.6ppts YoY Average RSP £3.89

PREMIUM MAINSTREAM APPLE

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



BEST

9.8% OF TOTAL DRAUGHT APPLE
+0.6ppts YoY Average RSP £4.50

CRAFTED APPLE

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



Mainstream apple has an average RSP of £3.53 per pint, premium & crafted brands now account for 47.8% share of draught apple cider and combined they attract an average RSP of between 36p to 97p more than mainstream.

The burgeoning trend to more crafted brands has certainly accelerated as we emerge from Covid. Pre-pandemic the mainstream category was 55.6% share of the total draught apple category and at Jan 2022 this has dropped 3.4ppts to 52.2%

Cloudy keg ciders, as a sub-segment of draught apple, bring interest to category as they offer a slightly sweeter and more contemporary profile to the consumer. Share has fallen just over 1ppt from the last edition of the cider report but they still represent 8% of the category in volume & 8.4% in value. The category leader remains Thatchers Haze, although it's average price point at £3.75 suggests a more mainstream positioning than you would expect.

Largely due to operational reasons, packaged cider has grown share from 23.2% in December 2020 to just over 26% of the total cider category in Jan 2022. This is driven by the growth in packaged fruit as volume shifts from the front of the bar back to the chiller as draught fruit taps have been removed due to keg rationalisation and reduced footfall. As cider taps become more closely scrutinised there are increased opportunities for more premium packaged ciders, particularly in food led outlets, be that apple, fruit or rosé.

ON TRADE SNAPSHOT

£1,153m is spent on cider in the on trade **+50.4%** vs YA



Total volume **162 million litres** purchased, up **+46.1%** vs YA

The average price of a pint of cider is **£4.03**, **+\$0.12** vs YA



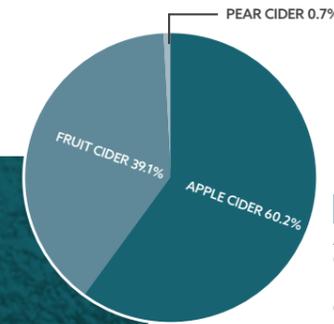
On trade **volume** share is **73.8%** draught serve, **+40.2%** YoY & **26.2%** packaged serve, **+65.4%**

On trade **value** share is **68.0%** draught serve, **+43.1%** & **32.0%** packaged serve, **+69.0%**

The average on trade outlet sells **24.6 hls of cider per year**, **+39.2%** vs YA



There are **66,216** cider distribution points (apple & fruit), **+4.9%** vs YA



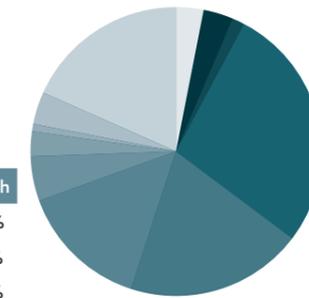
FLAVOUR

Type	Share	Growth
Apple Cider	60.2%	42.9%
Fruit Cider	39.1%	51.2%
Pear Cider	0.7%	50.1%



TENURE

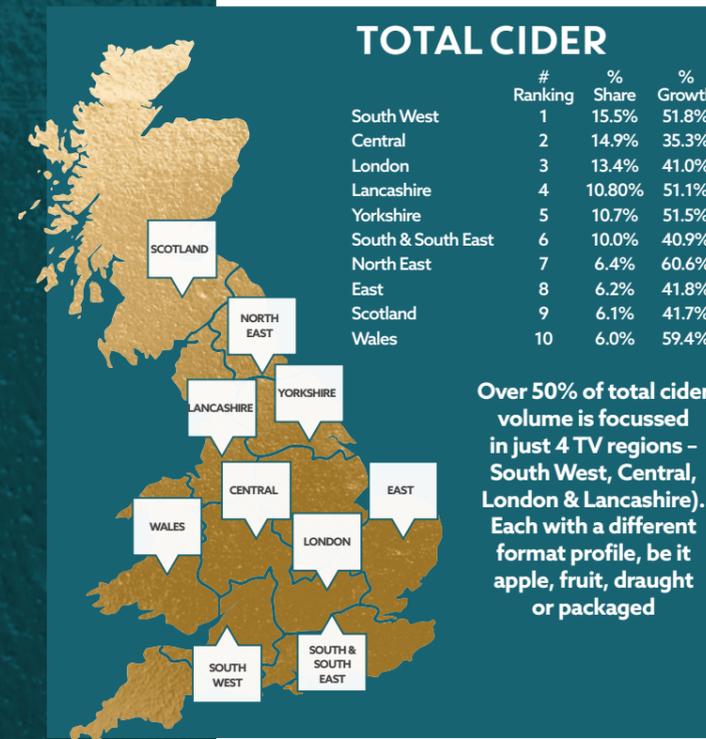
Type	Share	Growth
Free Trade	46.1%	46.8%
Managed	30.6%	47.6%
Non-managed	23.3%	42.7%



VENUE

Type	Share	Growth	Type	Share	Growth
Bar	3.2%	38.7%	Hotel	5.0%	86.1%
Bar Restaurant	3.2%	35.8%	Large Venue	2.8%	138.6%
Casual Dining Restaurant	1.5%	61.8%	Nightclub	0.8%	59.2%
Community Pub	27.1%	42.5%	Restaurant	3.5%	51.1%
Food Pub	19.7%	40.7%	Sports & Social	18.1%	48.2%
High Street Pub	14.2%	35.6%			

CIDER REGIONALITY



TOTAL CIDER

	#	%	%
	Ranking	Share	Growth
South West	1	15.5%	51.8%
Central	2	14.9%	35.3%
London	3	13.4%	41.0%
Lancashire	4	10.80%	51.1%
Yorkshire	5	10.7%	51.5%
South & South East	6	10.0%	40.9%
North East	7	6.4%	60.6%
East	8	6.2%	41.8%
Scotland	9	6.1%	41.7%
Wales	10	6.0%	59.4%

Over 50% 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, fruit, draught or packaged

DRAUGHT APPLE

	#	%	%
	Ranking	Share	Growth
South West	1	20.3%	46.3%
Central	2	16.0%	33.7%
London	3	13.6%	39.0%
South & South East	4	10.8%	34.6%
Yorkshire	5	8.5%	42.7%
Lancashire	6	8.2%	56.5%
Wales	7	6.5%	55.7%
East	8	5.7%	34.5%
North East	9	5.3%	54.9%
Scotland	10	5.0%	38.0%

The South West is the leading region for draught apple cider with just over 20% of total UK draught apple volume

PACKAGED APPLE

	#	%	%
	Ranking	Share	Growth
South West	1	15.5%	51.8%
Central	2	14.9%	35.3%
London	3	13.4%	41.0%
Lancashire	4	10.80%	51.1%
Yorkshire	5	10.7%	51.5%
South & South East	6	10.0%	40.9%
North East	7	6.4%	60.6%
East	8	6.2%	41.8%
Scotland	9	6.1%	41.7%
Wales	10	6.0%	59.4%

London by far is the largest geography for packaged apple cider but it is growing across all TV regions but particularly Lancashire, South West, Wales & North East

DRAUGHT FRUIT

	#	%	%
	Ranking	Share	Growth
Central	1	16.1%	24.0%
Lancashire	2	16.0%	33.4%
Yorkshire	3	15.1%	43.1%
North East	4	9.5%	46.9%
South West	5	8.9%	53.6%
South & South East	6	8.1%	32.7%
London	7	7.9%	22.9%
Scotland	8	6.5%	23.6%
Wales	9	6.3%	57.9%
East	10	5.7%	31.2%

Despite Central currently being the largest TV region for draught fruit cider, the northern bias remains for fruit cider

PACKAGED FRUIT

	#	%	%
	Ranking	Share	Growth
South West	1	15.5%	51.8%
Central	2	14.9%	35.3%
London	3	13.4%	41.0%
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Wales	10	6.0%	59.4%

Strong growth in all regions but particularly in areas where previously draught fruit propensity was higher e.g. Yorkshire, Lancashire & North East

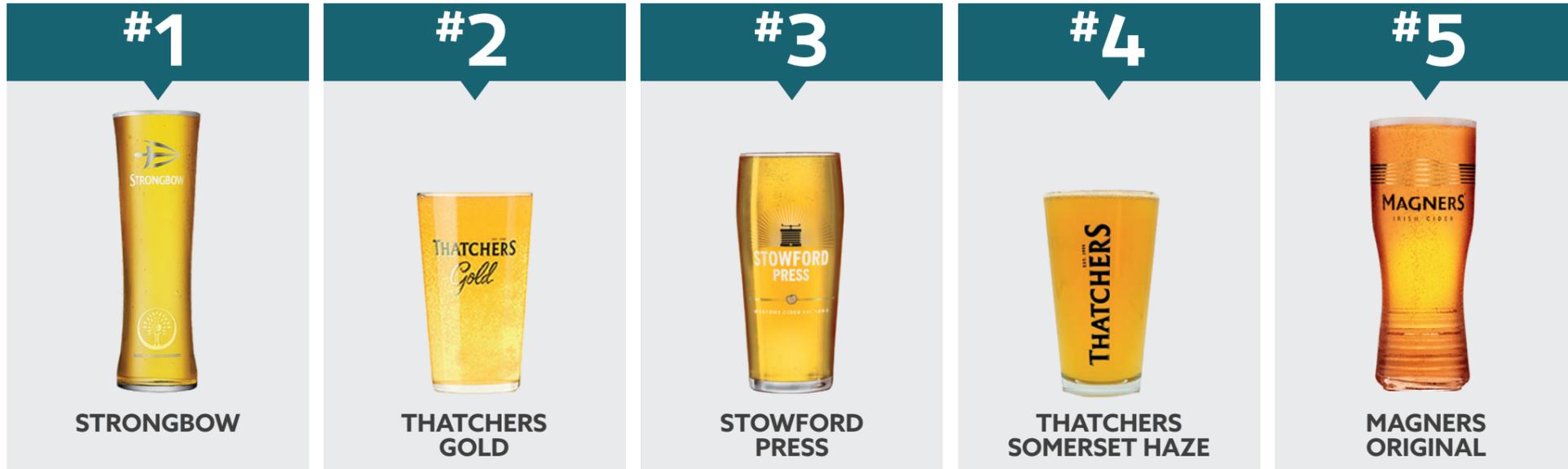
THE TOP 5 DRAUGHT CIDERS



While in decline pre Covid-19 (March 2020 volume -6.0% & value -3.6%) apple as at January 2022 is recovering strongly, it represents the lions share of the category at 73.5% and has stolen share from draught fruit (+1 ppt). Value growth has edged ahead of volume as we see premiumisation deepen (plus broader price inflation across BWS).

The top 5 draught apple ciders represent 51.3% of the total draught volume, marginally ahead YoY. Although if we look at a more granular level at total draught apple volume, the Top 5 accounts for 69.8% share, down from a previous 71.3%. Strongbow, as the market leader, has the largest share at 35.4% but this has been eroded since 2020 as more premium brands gain ground.

Of note, Thatchers Haze has replaced Magners as #4 as the trend for contemporary, sweeter cloudy ciders continues.

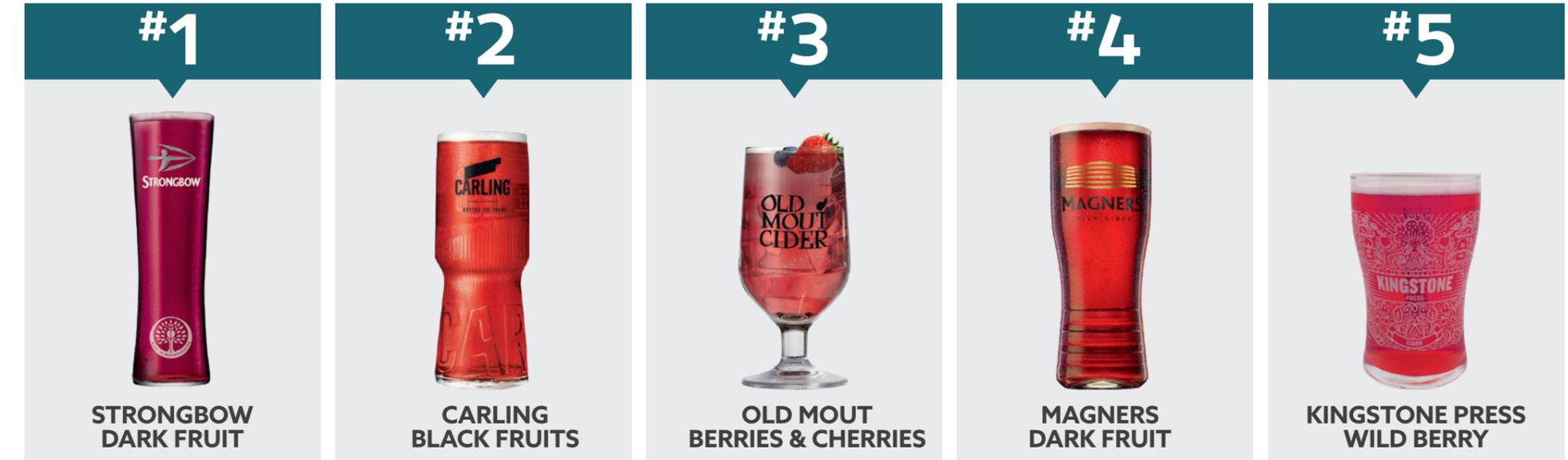


THE TOP 5 DRAUGHT FRUIT CIDERS



Pre-Covid, draught fruit cider was beginning to edge backwards from a volume perspective but as we saw newer, more premium variants enter the category value remained in growth. (March 2020 volume -1.8% and value +2.1%). As we now emerge from Covid value remains ahead of volume at +39.1% & +35.4% respectively. But more interesting is the overall format switch from draught fruit back into packaged fruit.

The top 5 draught fruit brands represent 24.1% of total draught, a drop of 2 ppts from the last edition of the Westons Cider Report and a commanding 90.9% of total draught fruit cider. Switches for positions #3 and #4 have both brought challenges for Strongbow Dark Fruits from both Old Mout Berries & Cherries and Kingstone Press Wild Berry, both of which have grown significantly YoY. Magners has dropped a place in both the draught apple & draught fruit Top 5.



THE TOP 5 PACKAGED CIDERS



In decline for a number of years packaged cider has seen a resurgence during the end of 2021, driven particularly by packaged fruit as emphasis has switched from draught back into the chiller. With volume growth, +65.4% and value growth +69.0%, 2022 sees this trend continuing as packaged outperforms the draught category.

Fruit remains the dominant share at 74.4%, apple 22.9% and pear just 2.7%. With just one apple brand in the top five, Magners Original, although dropping to #4 we've seen another fruit, Rekorderlig Wildberries enter the Top 5 at the expense of Bulmers Original.

#1



KOPPARBERG
STRAWBERRY & LIME

#2



KOPPARBERG
MIXED FRUITS

#3



REKORDERLIG
STRAWBERRY & LIME

#4



MAGNERS
ORIGINAL

#5

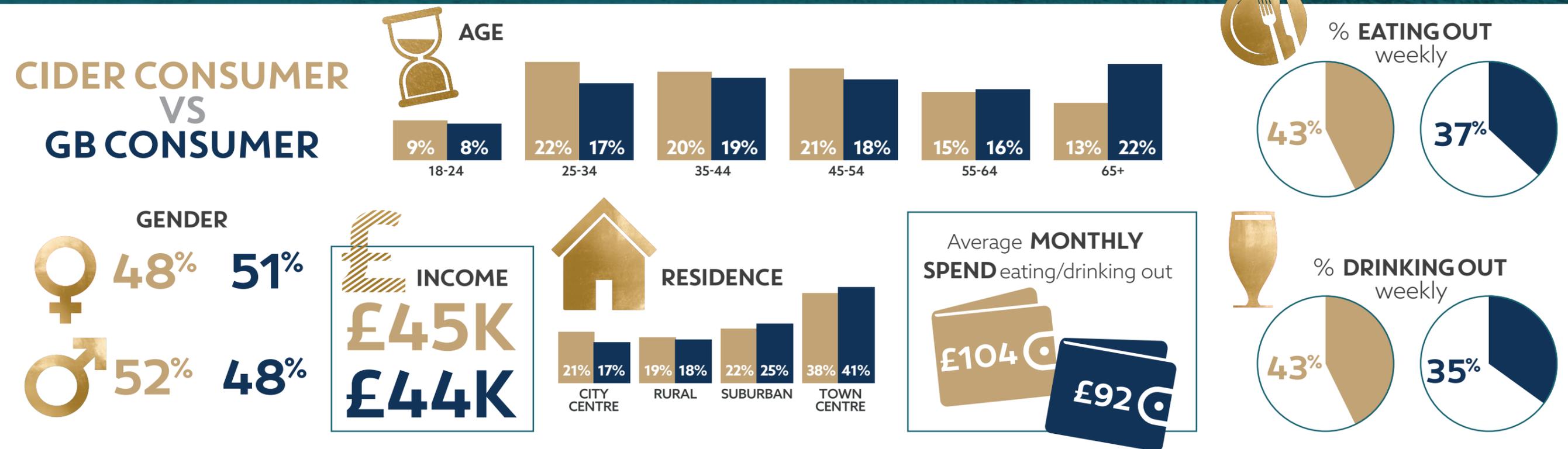


REKORDERLIG
WILDBERRIES

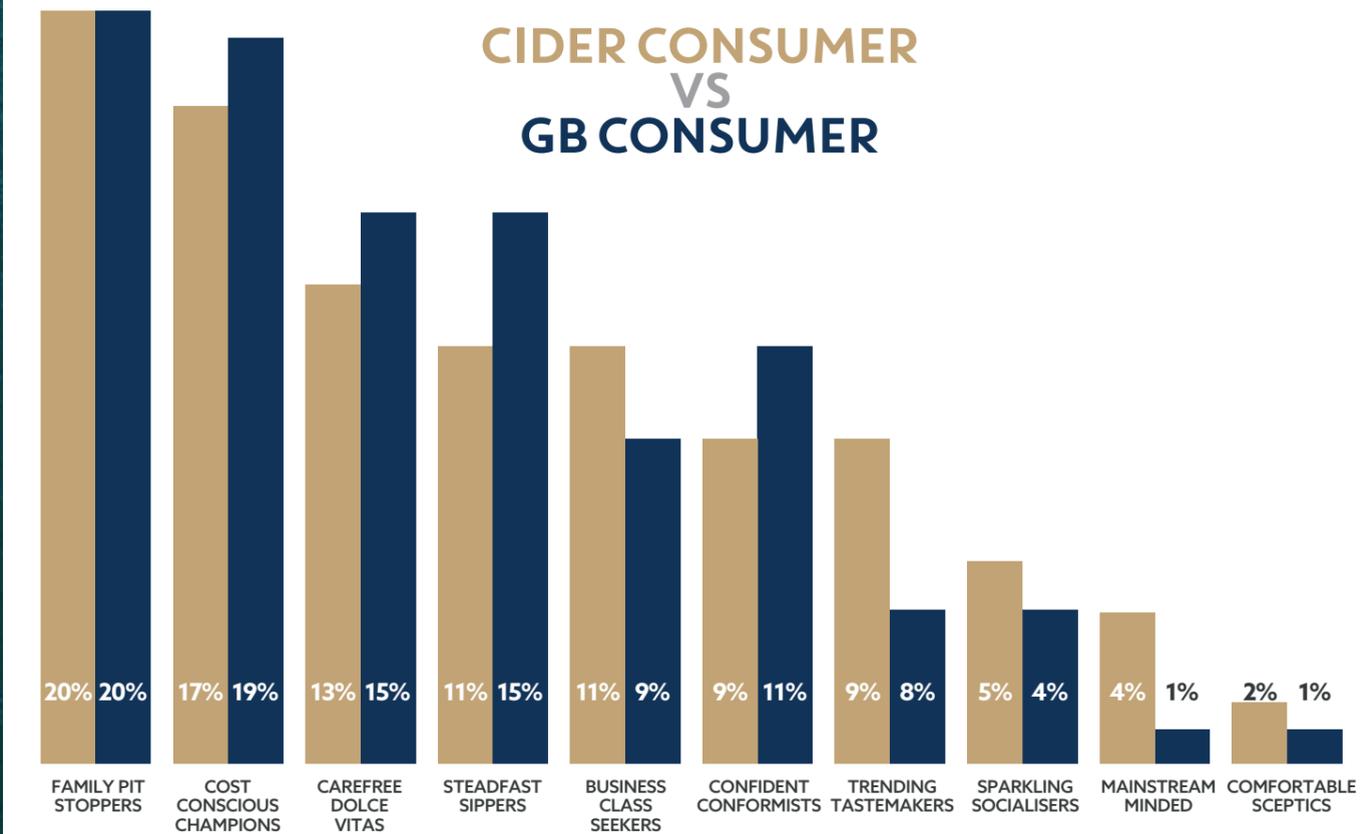


THE ON TRADE CONSUMER

Cider consumers are **predominantly younger** & visit the on trade **more frequently & spend more** than the average GB consumer



CIDER DRINKERS OVER-INDEX FOR THE CONSUMER TYPES THAT ARE THE HIGHER SPENDERS & THOSE MORE ENGAGED WITH THE ON TRADE



CRAFTED

A strong and emerging category in the on trade cider market with a vibrant mix of keg, bag-in-box, packaged, apple & fruit formats. But all underpinned with authenticity, provenance, quality ingredients and craftsmanship.

Premiumisation & crafted go hand-in-hand with the added layers of Britishness, localism, tradition & heritage.

Consumers more than ever are confident in their choices, fully engaged with the category and openly questioning the quality and positioning of a brand.

72% of cider drinkers agree it is important to support British cider brands



30% of cider drinkers find barrel aged ciders appealing



20% of cider drinkers always drink cider which is not made from concentrate



47% of ciders drinkers agree that it's important to know about a cider brands heritage



52% of cider drinkers agree that the ingredients are really important & where they come from



Importantly, from an outlet perspective, with reduced dwell time & reduced spend per visit, crafted ciders offer an opportunity to add real value and maximise profits.



On average a pint of Old Rosie commands an RSP of +21% vs average mainstream ciders.



BAG IN BOX

DRIVING OUTLET OCCASIONS

Bag-in-box 10L & 20L cider formats offer additional interest to an outlet's draught cider range. These highly versatile formats can be dispensed on a handpull through the cellar (with a Westons supplied connector fitting), from the fridge or at room temperature directly from the shelf.

BENEFITS

With a declining cask ale category it gives an opportunity to reinvigorate any redundant handpulls and return the line to profit. But more important is to present to the consumer a vibrant bar, which is fully stocked with no dead, out of stock handpulls.

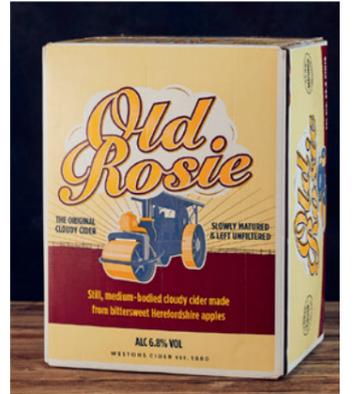
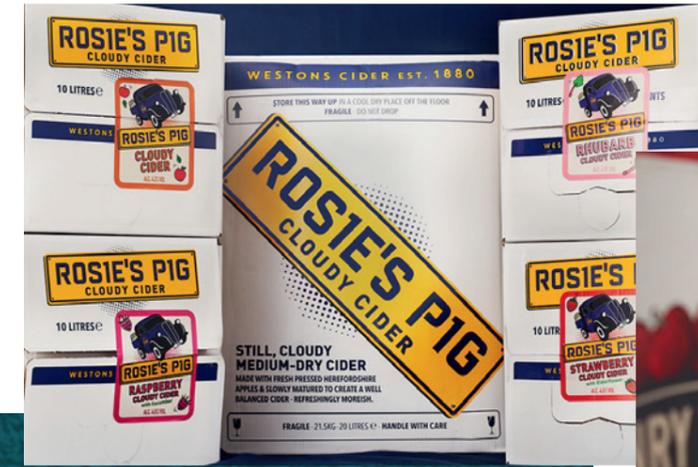


An opportunity to really engage with cider enthusiasts by offering a varied and interesting range of ciders – hazy, bright, apple or fruit. Creating a regular reason to visit to sample the latest addition to the cider range, creating some buzz & anticipation.



Limited risk both in terms of shelf life, volume and price.

A real opportunity to add incremental cash as the average RSP is higher than mainstream ciders (Old Rosie average RSP £4.28 / pint).

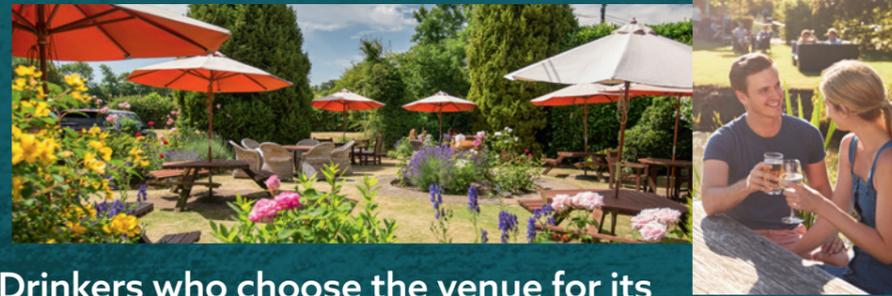


OUTSIDE OCCASIONS

The last two years have meant that many outlets have had to invest in improving or developing an outdoor space, in order to not only comply with various restrictions but also to cater to those drinkers who felt more comfortable socially distanced when in the fresh air.

Choosing an on trade venue because it has a good outdoor area ranks amongst the top 10 reasons for choice of venue, with 6.9% of on trade occasions being chosen because of this. Outdoor areas are steadily becoming more important and are especially important in the months from April to September – in the 3 months ending 30/09/2020 11.2% of occasions were decided by a good outdoor area.

TRADE UP OPPORTUNITY



Drinkers who choose the venue for its outdoor area are less price considerate and this is reflected in the amount they spend per occasion.

42.9% of cider "It has a good outdoor area" drinkers consider price in the on trade vs 48.8% of average on trade cider drinkers. Average spend on Food & Drink is £34.91 vs £31.83 of average on trade cider occasions. This suggests that a great outdoor area at an outlet goes hand-in-hand with a more premium food and drink offering.

When it comes to the type of venue chosen for its outdoor space it is food pubs which are more popular, over-indexing versus the average on trade cider occasion. Despite this 'good outdoor area' occasions under trade in food occasions, but within this Bar Meals are a popular choice of meal. 8.8% of serves include a bar meal compared to 6.3% for total on trade cider serves. This may suggest that lighter bites and tapas style dishes for example would be a good way of increasing spend further within this group of outdoor drinkers. Encouraging lighter meals and snacks may help convert those outside drinkers who do not currently consume food with their cider (53.7%).

THE DRINKER



In terms of who it is who values outdoor cider drinking, it is an older and more likely to be female consumer.

Females make up 50.1% of 'it has a good outdoor area' drinkers compared to 37.2% of total on trade cider drinkers. 60.9% of drinkers are aged 35+ vs. 43.5% in total on trade cider. Mixed sex groups are the most common group structure, with female groups also over-indexing and children less likely to be present. Mixed sex pairs over index significantly too, which is the understandable from the impromptu household occasion, to enjoy a drink in a spell of sunny weather as a couple.

DRINKING OCCASION



When the venue is chosen for its outdoor offering, the occasions do vary from the average cider occasion with going out as a couple, catch-ups (15.9% of serves) and family occasions all over-indexing.

And the main motivations behind these occasions are 'to spend quality time' as well as 'to have a laugh'. In terms of what time and day these occasions take place, 'good outdoor area' occasions over-index at the weekend, starting in the early afternoon as well as in the evening. There is a strong over index between the hours of 2pm and 4.59pm, this time slot accounts for 26.3% of outdoor drinking serves (vs. 19.4% for total on trade cider). A good outdoor space can therefore encourage serves in non-peak hours.

In summary, a good outside area is great for the cider category due to its overtrade and can encourage drinkers to spend more. There also remains an opportunity to increase spend further by converting the 53.7% of serves that are not currently with food.

Cider share of average on trade serves

12%

Cider share of "It has a good outdoor area" on trade serves

13.1%

Cider over-indexes in outlets that have been chosen because of their good outdoor area, accounting for 13.1% of serves. Cider's popularity within occasions chosen for the outdoor area has been longstanding, with it over-indexing notably over each of the last 6 years.

ON TRADE STOCKING RECOMMENDATIONS

The importance of range, across both draught & packaged is becoming ever more important to encourage footfall with cider drinkers.

But it's vital this range is clearly differentiated with each brand & format offering something uniquely different; be that point of entry, trade-up, crafted or fruit. Careful consideration should be given to the balance of apple vs fruit taps. Where outlet style and geography dictate, apple should be given greater focus with fruit cider moving to the chiller in a packaged format.

DRAUGHT CIDER

Cider has retained its position on the bar compared to pre-Covid



The average draught LAD stockist stocks **2.1 Draught Ciders** on the bar **+8.0% vs 2YA**

With greater share now premium cider, be that apple or fruit, more emphasis is to be given to its prominence and availability in outlet.

Although most Draught Cider stockists stock 3 or less Draught Ciders, there is a shift towards an increasing number of outlets expanding their Draught Cider range



Number of outlets that STOCK 3 OR LESS Draught Ciders on the bar

60,326
-14.3pp vs 2YA

Number of outlets that STOCK 4 OR MORE Draught Ciders on the bar

14,144
+31.9pp vs 2YA



TOTAL CIDER TAPS
-0.1PP



PREMIUM CIDER TAPS
+1.0PP



STANDARD CIDER TAPS
-1.1PP



The average Draught LAD stockist stocks...



0.7
PREMIUM DRAUGHT CIDERS on the bar
+28.7% vs 2YA



1.4
MAINSTREAM DRAUGHT CIDERS on the bar
+0.1% vs 2YA

With 1 in 3 Premium Draught Cider stockists now stocking more than 1 option on the bar...

36.2%



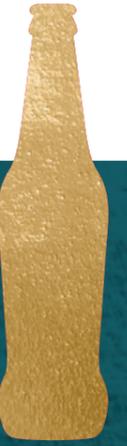
of premium Draught Cider stockists STOCK 2 OR MORE premium Draught Ciders on the bar
+4.0pp vs 2YA

Bag-in-box ciders can play an important role in refreshing and reinvigorating a draught range and should be considered as a complementary format.

PACKAGED CIDERS

As packaged ciders have gone through a renaissance, led largely by fruit, apple also has an important part to play.

With cider serves becoming increasingly food led packaged apple, particularly premium & rosé, offer a credible alternative to wine.



73%

of cider consumers find range important when choosing where to visit

7 in 10

cider consumers ask for a specific brand when ordering cider in the on trade (-6ppvs 2YA)

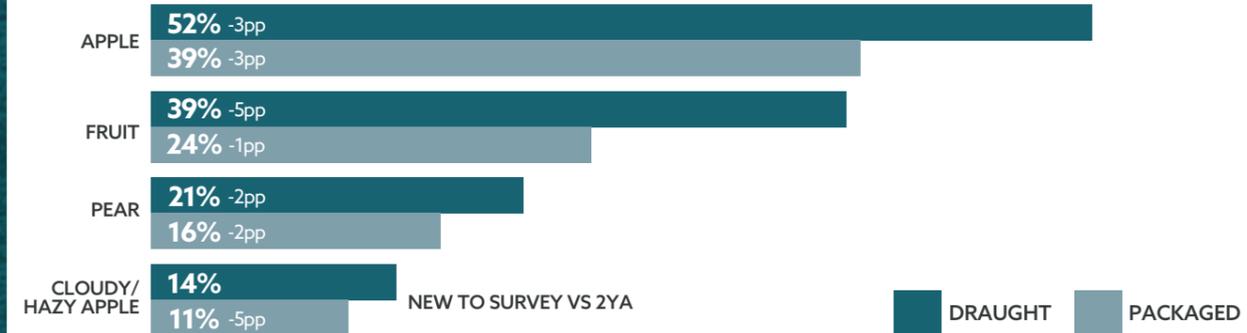
18%

of Av GB consumers drink cider when out
-7ppts vs 2019

47% PACKAGED
-4ppts vs 2019

54% DRAUGHT
+5ppts vs 2019

TYPES OF CIDER CONSUMED WHEN OUT INDEXED VS 2YA

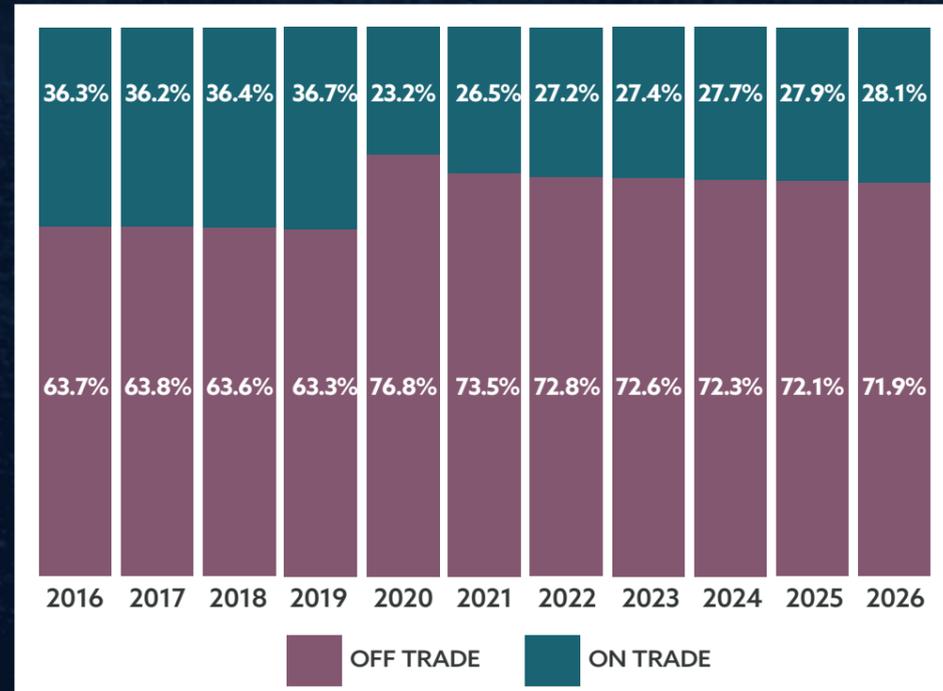


INTERNATIONAL SNAPSHOT



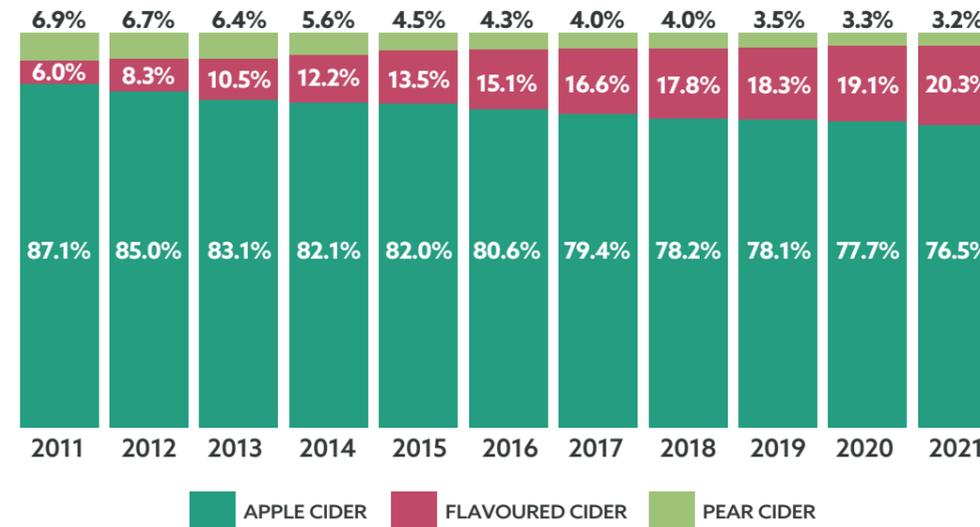
Globally 2477 million litres of cider were sold in 2021 (forecast), up 1.8% on the previous year.

As with the UK we have seen the balance between channels shift as varying degrees of restrictions have impacted upon on trade sales. In 2020 76.8% of global cider volume came from the off trade. If we look at a 10 year view from 2016 to forecast volumes in 2026, we can see the expectation is that we slowly return to more normal levels with 71.9% of volume forecast to come from the off trade in 2026.



FLAVOUR

In terms of share we haven't seen fruit / flavoured cider reach the same share globally as it has in the UK. In the most recent year fruit accounts for 20.3% of global cider volume, this has increased over the past 10 years from just 6.0%. Pear cider share has tailed off and is now 3.2% of the market.



THE TOP TEN (by volume)

The UK is still by far the largest cider market with 31.1% of international cider volume.



Looking at growth opportunities between 2022 and 2023, South Africa is forecast to grow by 14 million litres. Second in terms of potential growth is the UK with 12 million litres, then Canada 10M litres, Australia 7M, and Spain with expected growth of 6 million litres.

SUSTAINABILITY

CIDER SUSTAINABILITY CREDENTIALS

As all companies, industries and categories look to make increasingly firm commitments towards reaching Net Zero, cider may very well have some built in credentials that it could leverage to help it win with consumers ahead of other drinks categories.

Overall, cider is very in step and up to speed with the UK Food industry, when it comes to ensuring the environment is considered. There are few, if any stakeholders that are not now addressing and working together when it comes to packaging, waste and recyclability, and there seem to be examples of initiatives across all channels to ensure suppliers, retailers and outlets are all doing their bit.

Consumers too have recently shown an increased interest, expecting brands to be more responsible towards sustainability. Referencing Covid-19, 55%* of UK population have said its now more important for companies to behave more sustainably.

The UK is by far the largest cider consumer and cider producing market, and so it is a 'local' category. And when it comes to the simple raw materials, cider can really deliver on the local credentials. Approximately a third of the apples grown in the UK are used in the cider industry, and so the contribution of the orchards alone has a positive impact. Mintel reported in 2021, that 72% of consumers believe that it is important to support British cider brands, so there is a loyalty there ahead of other drinks categories. There is a strength of feeling that can be capitalised upon by then also adding sustainability details, quality local ingredients and authenticity that will resonate with consumers.

In summary, the opportunity is there for the UK cider category and UK cider brands, to position within the sustainability movement in a true and meaningful way to engage consumers.



DUTY CHANGES IN 2023



THE NEW ALCOHOL DUTY SYSTEM

The proposals announced by HM Treasury under this latest consultation are outlined here, however, at the time of writing, the consultation has just closed and responses have been submitted from across the drinks industry, questioning the timing and content of the proposals. Concerns have been raised by all drinks sectors around claims that the proposals simplify and improve the current system. It is likely to be several months before consultation.

BACKGROUND

Following on from Brexit, a number of policies that had previously been under EU control, were reviewed by the government. The EU Alcohol Structures Directive is a policy that provides a structure and broad mechanism for member states to manage excise duty across the single market.

HM Treasury announced plans to review the structure and adapt it to better suit the UK market and UK alcohol producers. An initial consultation took place in Autumn 2020, inviting interested parties to contribute views on how the excise duty system could be better structured. A review of evidence submitted at the time was eventually published in October 2021, and a further consultation announced in the Autumn Budget Statement.

The proposals announced by HM Treasury under this latest consultation are outlined here, however, at the time of publishing, the consultation continues, and it is possible that the proposals will change as evidence submitted to this latest consultation is reviewed.

OVERVIEW

Key features of the proposed new alcohol duty structure are:

- An overall simplification of both the structures and the administration of excise duty.
- All excise duty rates will be calculated on the basis of a rate per litre of pure alcohol.
- A flat rate of excise duty will be introduced for all types of alcoholic drink between 1.2% ABV and 3.4% ABV.
- Between 3.5% and 8.4% ABV there will be three rates, for beer; cider; wine/made-wine/spirits.
- Two further bands will be introduced each with a flat rate across all alcoholic drinks. 8.5%-22% ABV and above 22% ABV.
- Administration of the excise duty system by HMRC will be simplified, with a single system to cover all types of alcohol production; simplified rules for storage, a single duty return across all alcohol types and a move to digitise the full system and align payment dates.

WHAT DOES THIS MEAN FOR THE CIDER INDUSTRY?

The cider industry has submitted further evidence in response to the current consultation and looks forward to hearing how the proposals will be adapted to reflect concerns raised around some of the detail of the proposed new system.

However, assuming that the overall structure remains unchanged, it is expected that from February 2023, the new alcohol structure would:

- Encourage greater innovation below 3.5% ABV.
- Excise duty rates for ciders between 3.5% and 8.4% weighted by strength, so higher ABV ciders would see a small increase in excise duty rates, a lower ABV cider would see reduced excise duty rates. Absolute levels are still under discussion.
- Reduced excise rates for Draught Ciders and flavoured ciders, to support the hospitality sector.
- In addition to the current exemption for producers making less than 70HL, a Small Producer Relief Scheme will be introduced to encourage investment and growth. This will see a sliding scale of excise duty relief, and again details and levels are still under discussion at the time of writing.

The review of alcohol structures is a once in a generation opportunity to create a platform for the cider industry that encourages growth, innovation and long-term commitment to cider making and cider apple growing. There is much work still to do to ensure that the detail behind the new structure supports the history and heritage of cider making, but the cider industry will be closely monitoring the process and responding at each stage to ensure the best possible outcome for cider makers, retailers and consumers.

MARK HOPPER

Public Affairs Director for NACM

THE YEAR AHEAD

LOOKING FORWARD...

We will see growth in the cider category in 2022 year on year! There is more and more certainty that the on trade will have few, if any restrictions in 2022. And while the off trade will be challenged year on year, when the channels are combined, cider will see value and volume growth.

And while there is no big global sport tournament this summer, there are still a large number of occasions and events that will drive cider sales. Over the summer, the bank holidays regularly feature within the top 10 cider drinking occasions for the on and off trade, and this year we have the unique Platinum Jubilee Bank Holiday; this 4 day bank holiday in the summer, will undoubtedly drive cider sales within both channels. In 2021, within the off trade, the biggest cider week was the week ending 5th June which was worth £33.4m. This included the Spring Bank Holiday and was the week before the postponed Euro 2020 football tournament started.

The Platinum Jubilee extended Bank Holiday from Thursday 2nd June 2022 is likely to be one of the biggest cider weeks of the year. Availability and execution will be key for cider to take more than it's fair within both the on and off trade.

In the final quarter of 2022, we will see a very different set of drinking occasions affecting the year on year picture, bizarrely taking us further away from normal, and not 'back to normal'. Year on year, we hope no further Covid variants will be causing disruption as they did in 2020 and 2021, however, the first ever winter Football World Cup kicks off in November. A big football tournament always brings out lighter shoppers and drinkers in large numbers for the off trade and on trade. This strange new winter phenomenon will see a month long driver of drinks sales from 22nd November to 22nd December, all within Christmas Party season and ahead of Christmas. This is less of a cider season for the consumer, so the opportunity here for cider is to capture a fair share, in a season where cider typically loses share to beers, spirits and wine.





WE'D LOVE TO HEAR FROM YOU!

We would really like to hear from readers and invite you to share your thoughts:

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IRI 52 Week Ending 1st January 2022

Kantar Worldpanel 52 Week Ending 26th December 2021

CGA On Premise Measurement Service P13, 01/01/2022

CGA 2021 Hospitality Consumer Forecast

CGA / Alix Partners Market Recovery Monitor Jan 2022

CGA Consumer Pulse January 2022

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