



The European
Cider & Fruit Wine
Association

European Cider Trends 2017



European Cider and Fruit Wine Association, 2017

Introduction

European Cider Trends 2017 is a collaboration between Global Data and the European Cider and Fruit Wine Association (AICV) in producing a presentation that demonstrates the current:

- Key markets for cider (which includes perry, fruit flavoured cider and fruit wine)
- Tax rates in a number of consuming countries for cider
- 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.

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. It is forbidden to add distilled alcohol to cider.

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 the 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)

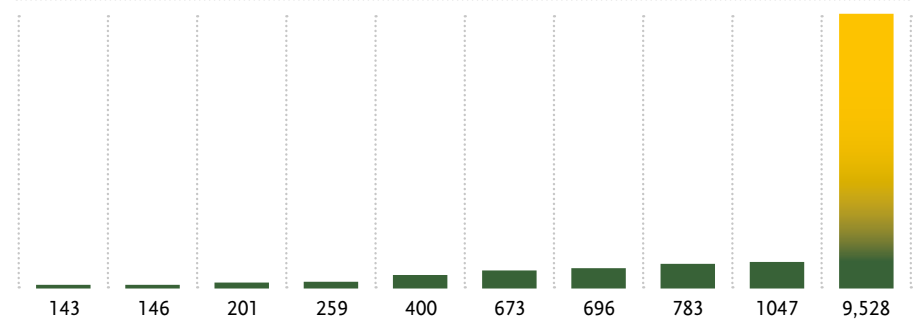
Cider* – Leading Markets

Lithuania	Sweden	Ukraine	Poland	Finland	Germany	Ireland	France	Spain	UK
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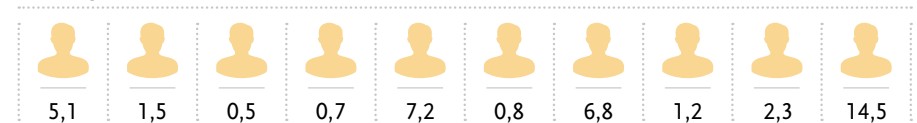
5yr CAGR 2011 - 2016

-7,4%	-0,1%	51,5%	122%	-4,4%	-0,2%	1,1%	-2,1%	0,8%	-0,5%
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Volume in '000 HL



Per Capita 2013



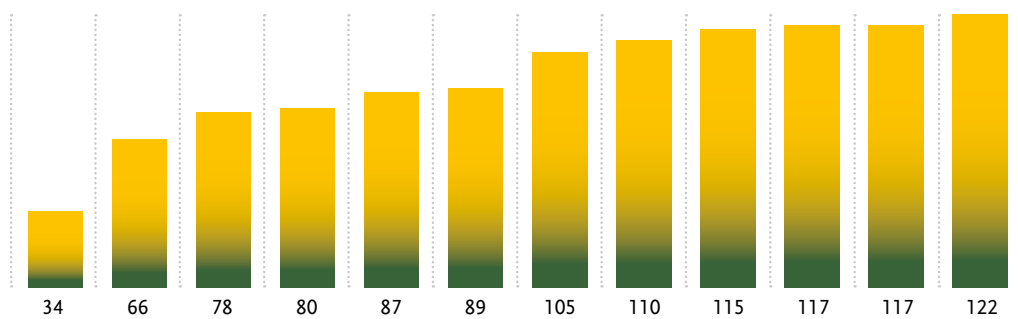
Cider* – Smaller Markets

Belgium	Denmark	Bulgaria	Latvia	NL	Austria	Estonia	Czech R.	Romania	Portugal	Norway	Switz.
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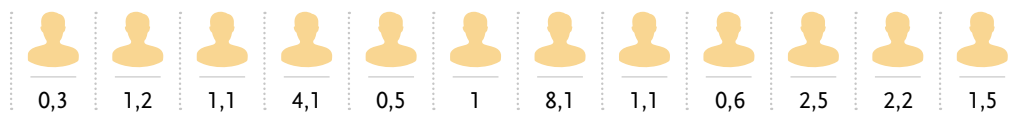
5yr CAGR 2011 - 2016

7,3% -13,2% 82,1% 10,6% 44,5% 5,7% 2,9% 156,3% 102,2% 41,7% 7,7% 1,9%

Volume in '000 HL

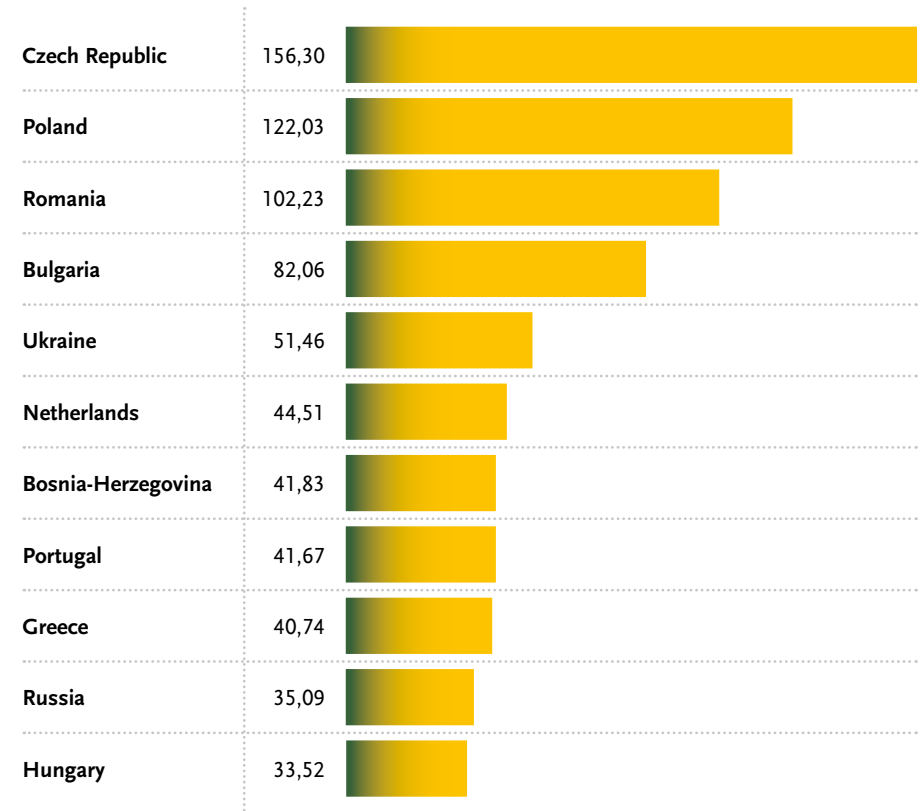


Per Capita 2017



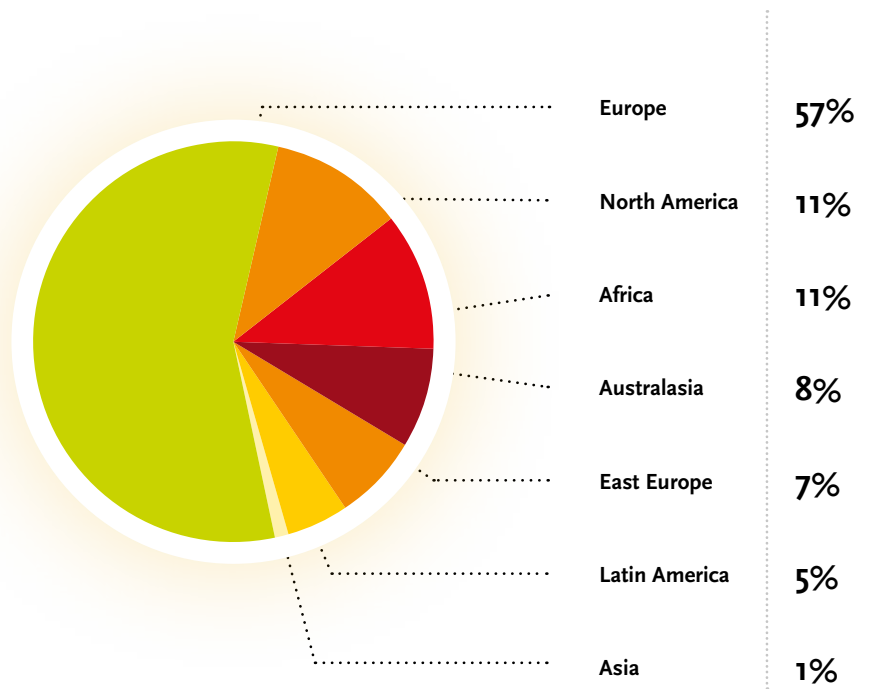
Europe: Fastest Growing Cider Markets

5yr CAGR (%) 2011 - 2016



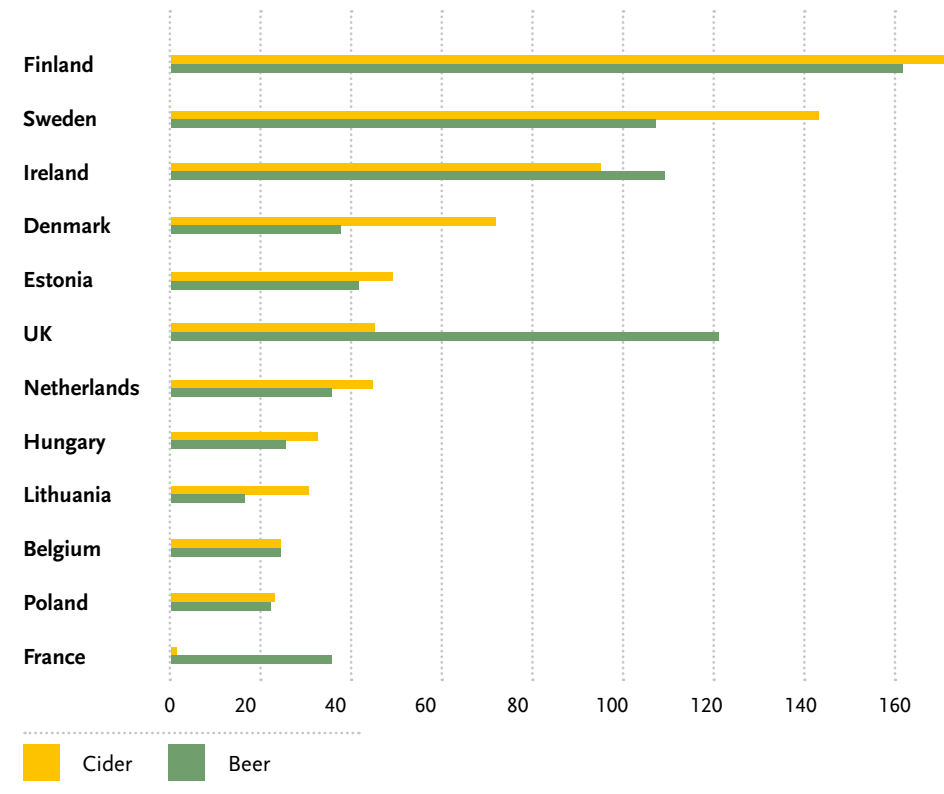
Cider Is Still Predominantly European

Regional Share of Consumption, 2016



Excise Duty

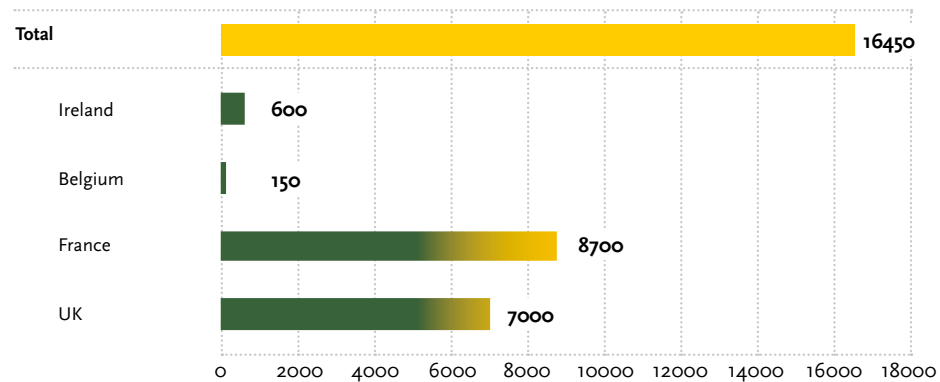
Excise Duty (in EUR) per Litre @ 5% cider vs beer



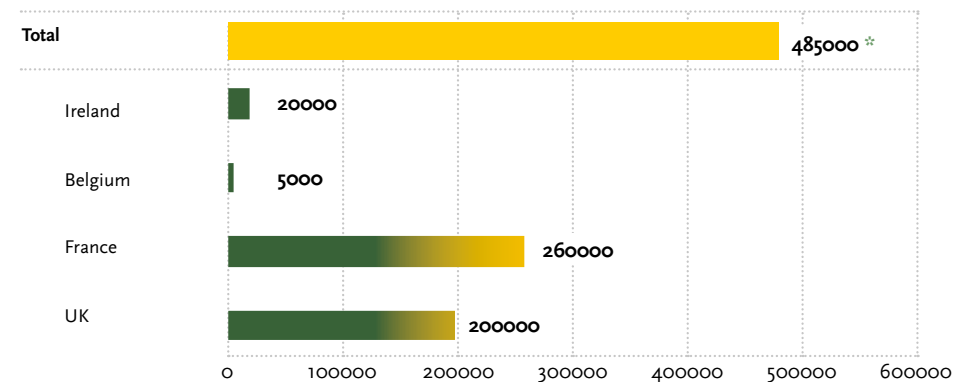
Countries with the zero rate for cider: Spain, Italy, Portugal, Bulgaria, Czech Republic, Germany, Greece, Austria, Romania, Slovakia, Croatia.
 Source: European Commission Excise Duty Tables revision 01.01.2017.

Agriculture

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



Quantity of Cider apples (bittersweet) processed per year (in tonnes)



Cider industry uses about 1.000.000 tonnes of apple a year. Seen the total EU figure of 12.1 million tonnes of table apples, the EU Cider industry is thus using nearly 9% of the EU apples output.

* Equivalent in AJC: 69 300 tonnes

The richness of the European cider and fruit wine market

*Cider as
national pride*

French Cidres

Full bodied and fruity, robust ciders, with strong bitter-sweet 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

Wine-like cider, pale to light gold, very dry, sharp to medium sharp, medium fruity, gently carbonated. Speierling – with rowan berries is a sought-after speciality.

Flavoured variants exist, but under different categories.

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



Cidre



Flavoured Cidre

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.

British & Irish Ciders

Medium bodied ciders and perries with strong cider characteristics and medium carbonation.

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



Cider or Perry



Flavoured cider or 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.

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 and the UK. Representation to AICV is either via national trade associations or by direct company participation.

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.

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.

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

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 – Zwi zek
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

