



The European
Cider & Fruit Wine
Association

European Cider Trends 2020



Introduction

European Cider Trends 2020 is a collaboration between Global Data and the European Cider and Fruit Wine Association (AICV) in producing a guide that demonstrates the current key markets for cider (which includes perry, fruit flavoured cider and in some countries fruit wine).

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

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

AICV – European Cider and Fruit Wine Association

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AICV Transparency Register ID : 27459429876-64

www.aicv.org / aicv@aicv.org

What is Cider?

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

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

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

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

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

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

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

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

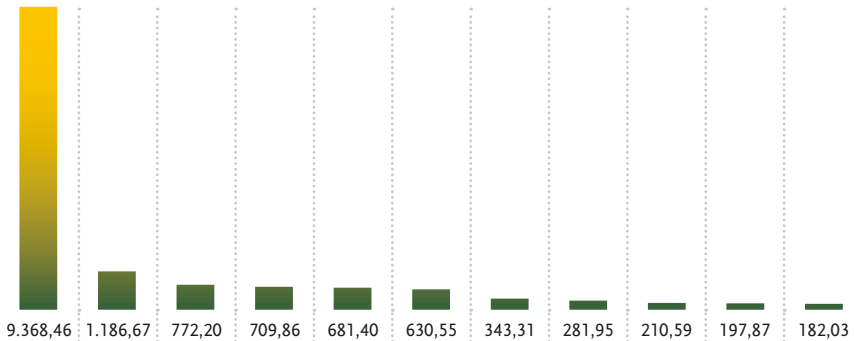
Cider* – Leading Markets

UK	Spain	France	Germany	Ireland	Poland	Finland	Ukraine	Russia	Czech Rep.	Sweden
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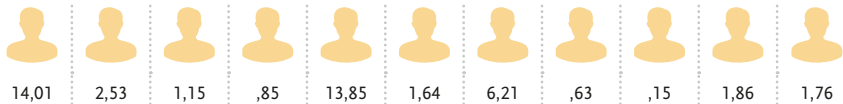
5yr CAGR 2014-2019

-0,90%	3,37%	-2,00%	1,15%	0,86%	17,02%	-4,00%	23,28%	28,18%	40,30%	3,60%
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Volume in '000 HL



Per Capita



* Including Somersby which is Apple Beer Drink in Poland

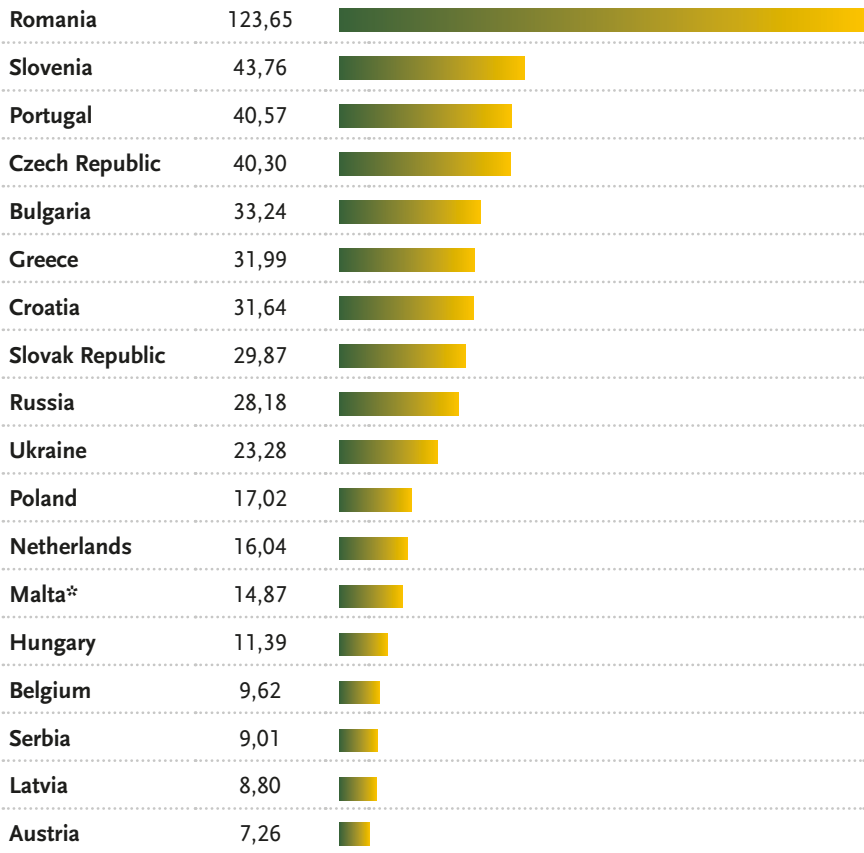
Cider^{**} – Smaller Markets

Country	Volume Th Hectoliters	
>100 KHL		
Romania	148,85	
Portugal	143,78	
Bulgaria	143,18	
Netherlands	139,05	
Norway	123,17	
Lithuania	119,96	
Switzerland	111,65	
Austria	109,74	
50 - 99 KHL		
Hungary	99,47	
Estonia	87,83	
Latvia	85,92	
Denmark	70,93	
Belarus	62,57	
<50 KHL		
Belgium	44,31	
Croatia	43,88	
Slovak Republic	40,64	
Greece	36,01	
Serbia	24,09	
Cyprus*	23,00	
Malta*	14,00	
Bosnia-Herzegovina	13,19	
Montenegro*	9,15	
Turkey	8,17	
Slovenia	6,14	
Italy	5,39	
Luxembourg*	5,00	
Moldova	3,50	
Iceland*	2,34	
Macedonia	1,33	

** Data for smaller markets is a forecast

Europe: Fastest Growing Cider Markets

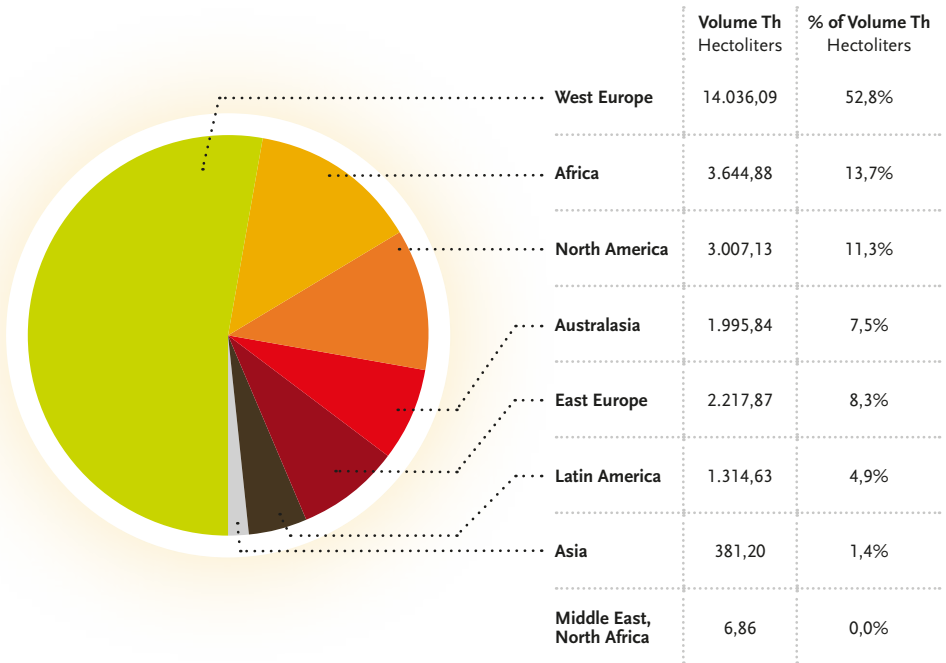
5YR CAGR



** Including Somersby which is Apple Beer Drink in Poland

Cider Is Still Predominantly European

Regional Share of Consumption, 2018*



Global Cider Volumes

	2012	2013	2014	2015	2016	2017	2018	2019
Volume Th Hectoliters	20.293,32	21.755,46	22.831,22	23.787,77	24.393,21	25.337,66	26.247,58	26.181,54

* Data for smaller markets is a forecast

Key Events

Global Cider Forum

The yearly event organised by AICV entitled Global Cider Forum has quickly become an industry event of the year. Organised since 2017, it offers every year expert insights on industry trends and challenges, tasting of ciders from around the world, and networking with expert cider makers, marketing directors, sales managers, suppliers, and others.

More info at www.global-cider-forum.com



World Cider Day

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

More info at www.worldciderday.com

HAPPY WORLD CIDER DAY TO ALL!



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 European countries: Belgium, Denmark, Finland, France, Germany, Ireland, Luxembourg, Poland, Spain, Sweden, the Netherlands, and the UK.

Representation to AICV is either via national trade associations or by direct company participation. Members of AICV include trade associations from the largest cider markets across the EU and represent all major cider makers including Heineken, Carlsberg and C&C. Collectively, this stands for more than 80% of all cider sold across Europe.

The 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 are foundations for product success.

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, discouraging any type of excessive consumption. AICV members participate 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

Luxembourg
 Ramborn Cider Co

Poland
 Polish Wine Council – Związek
 Pracodawców Polska Rada Winiarstwa

Spain
 Asociación Española de Sidras (AESI)

Sweden
 Brannland Cider
 Kopparberg Brewery
 AB Åbro Bryggeri

United Kingdom
 The National Association of Cider Makers
 (NACM)

Observer members

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