



The European
Cider & Fruit Wine
Association

European Cider Trends 2025



Introduction

European Cider Trends 2025 is a collaboration between GlobalData and the European Cider and FruitWine Association (AICV) in producing a guide that demonstrates the current key markets for cider (which includes perry, fruit flavoured cider and in some countries fruit wine).

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 who may not be familiar with cider and all its varieties.

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 Belgium, Denmark, Finland, France, Germany, Ireland, Italy, Luxembourg, Poland, Spain, Sweden and the Netherlands.

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, C&C and Kopparberg. 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.

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 cider 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 concentrated juice obtained from frozen fresh juice of apples, or from the fermentation of juice obtained from frozen apples. There is no addition of water, sugar or alcohol, and alcohol content is above 7 %.

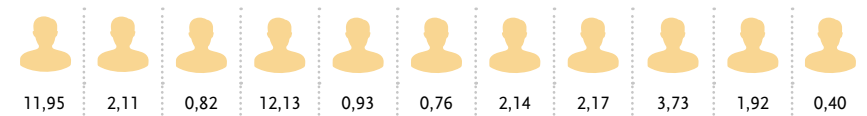
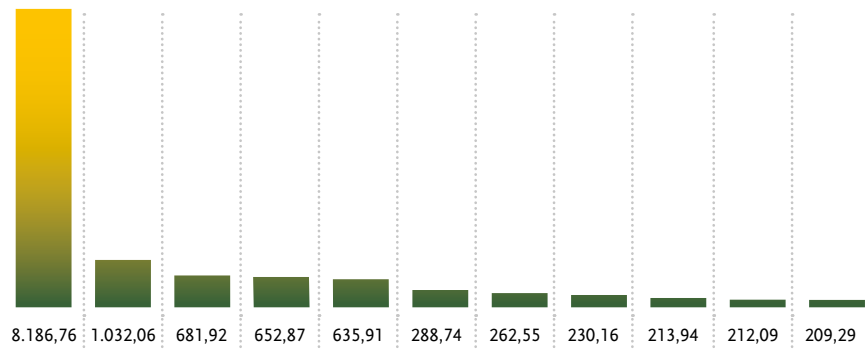
Cider – Leading Markets

UK	Spain	Germany	Rep. of Ireland	France	Ukraine	Czech Rep	Portugal	Finland	Sweden	Poland
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5-Year Compound Annual Growth Rate (CAGR), 2018–2023

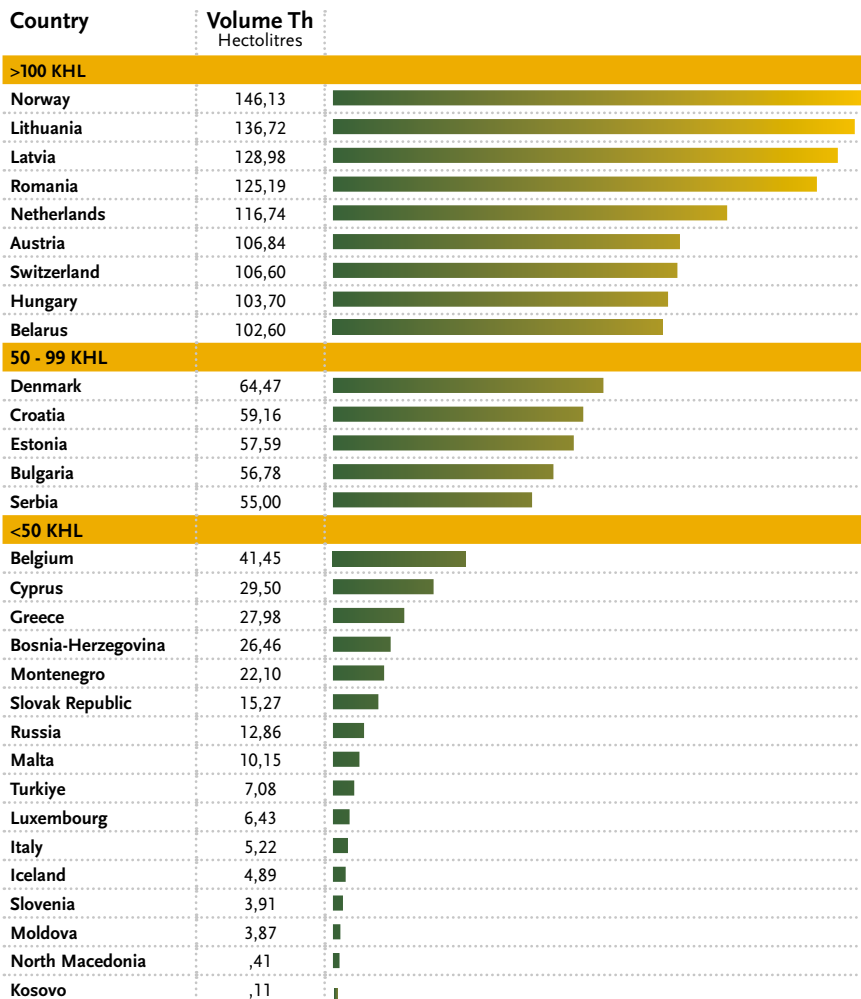
-2,65% -2,75% -0,80% -0,85% -3,82% 0,48% 2,92% 9,22% -6,00% 2,22% -4,93%

Volume in '000 HL



Note : Excluding Somersby which is positioned as Beer in France and Poland and classified as such in the GlobalData database

Cider - Smaller Markets, 2024

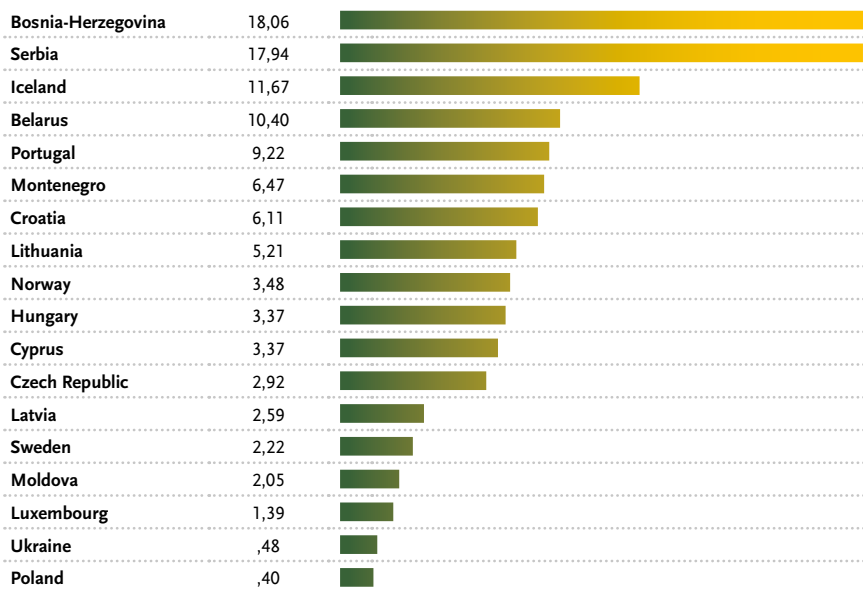


*Thousand Hectolitres

Note : Excluding Somersby which is positioned as Beer in France and Poland and classified as such in the GlobalData database

Europe: Fastest Growing Cider Markets

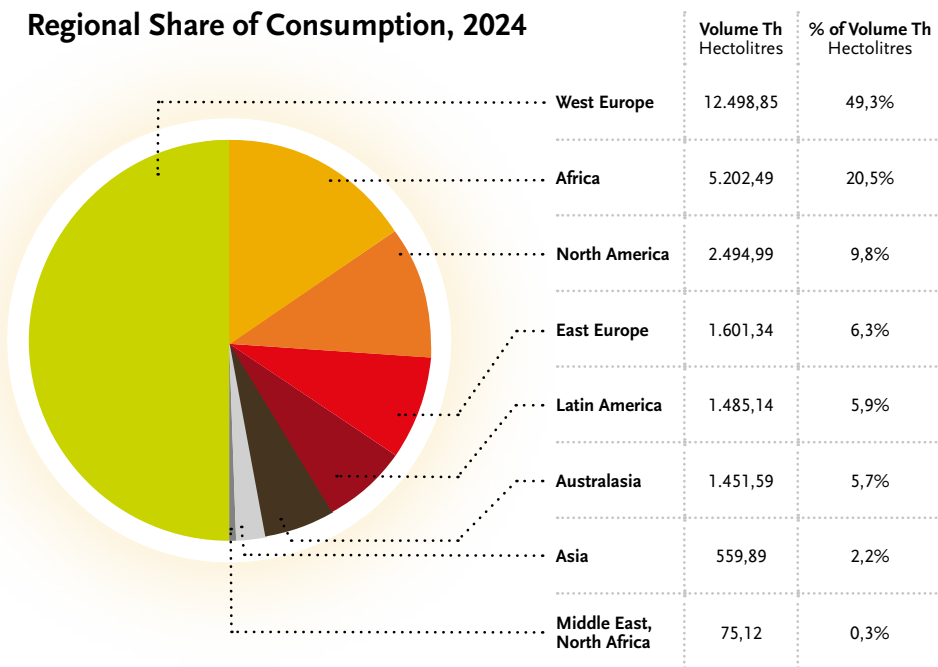
5YR CAGR, 2019-2024



Note : Excluding Somersby which is classified as a beer in Poland in the GlobalData database

Cider is Still Predominantly European

Regional Share of Consumption, 2024



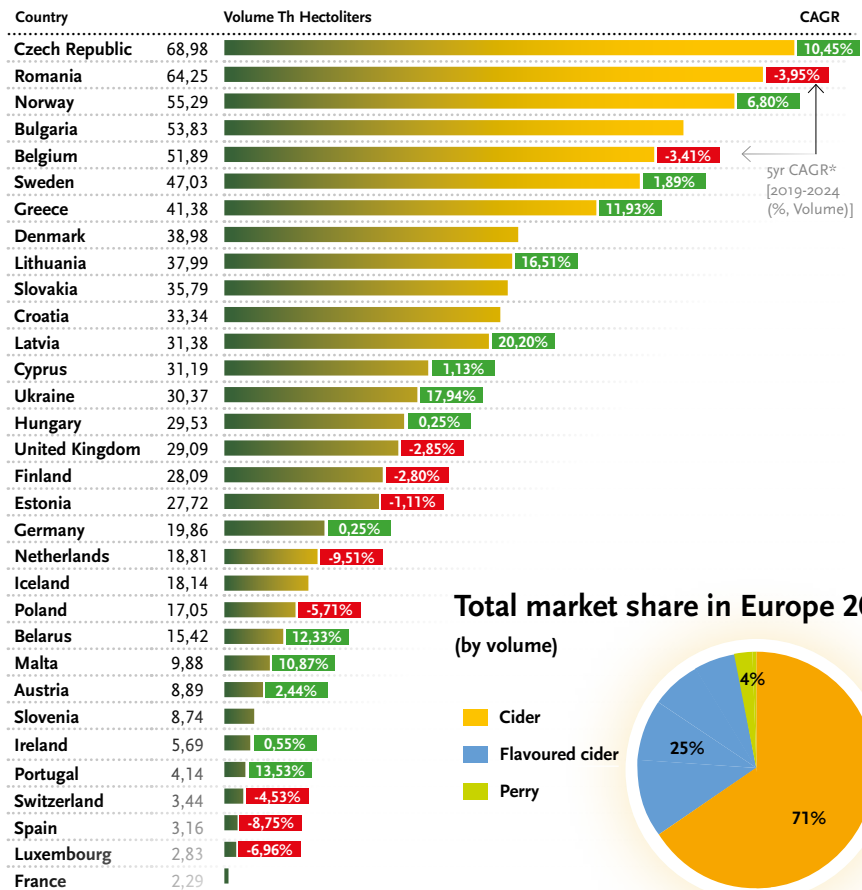
Global Cider Volumes

	2017	2018	2019	2020	2021	2022	2023	2024
Volume Th Hectolitres	25.788,70	26.898,67	27.135,16	23.816,09	24.351,47	25.016,6	24.651,34	25.369,41

Note : Excluding Somersby which is positioned as Beer in France, Poland, and Kazakhstan, and it is classified as such in the GlobalData database

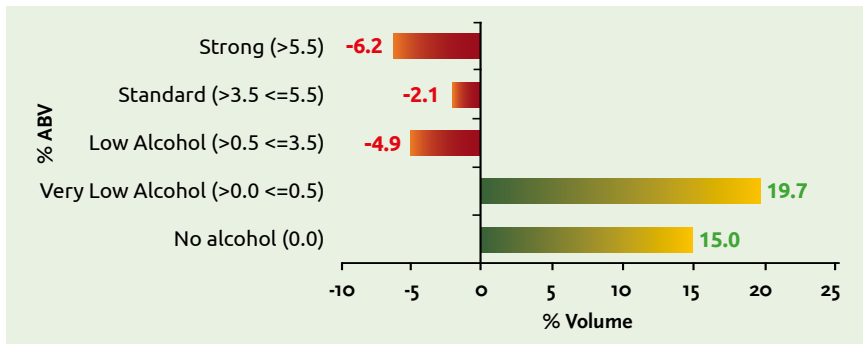
Flavoured cider trends

Percentage of Flavoured Cider in Overall Cider Production by Country
(by volume)

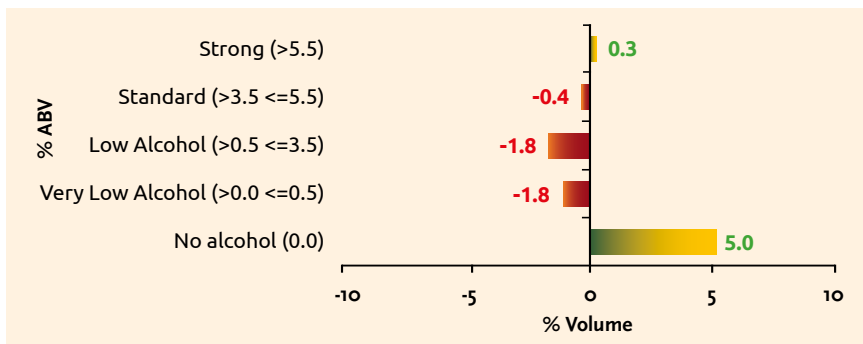


By Alcoholic Strength

Cider Consumption in EU by Alcoholic Strength (2019-2024 CAGR)



Beer Consumption in EU by Alcoholic Strength (2019-2024 CAGR)

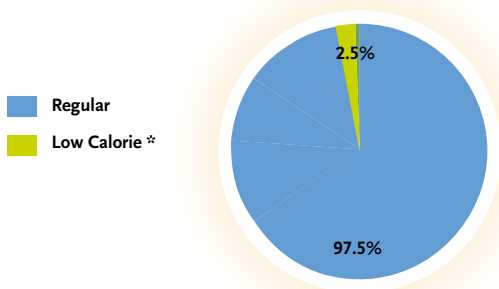


Note : Data excludes Somersby in Poland and France

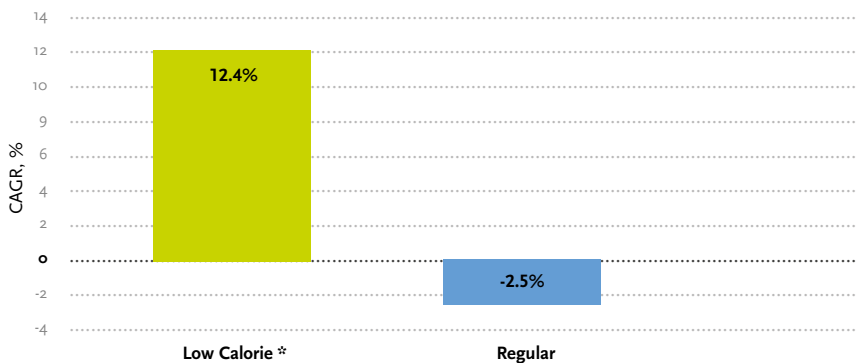
By Calorie Rating

Cider Consumption in the EU by Calorie Rating, 2024

(% of total volume consumed)



Low-Calorie vs Regular Cider Growth in EU (2019–2024 CAGR)

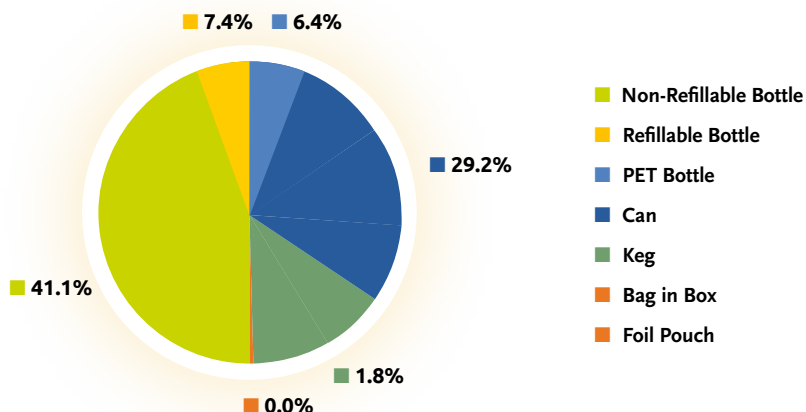


Note : Data excludes Somersby in Poland and France

*Note : 75% of Low Calorie volumes in Europe are comprised of Non-Alcoholic Ciders

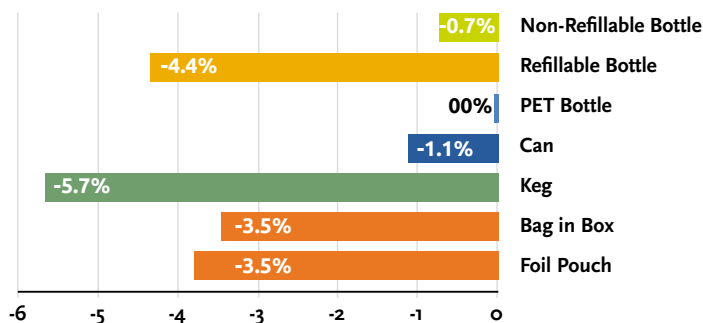
By Packaging

Cider Consumption in Europe by Packaging, 2024



Cider Consumption in EU by Packaging

5-Year CAGR (2019–2024, % Volume)



Note: Packaging data refer to the total market (HoReCa and Retail)

Excise Duty rates

Overview of standard rates in € / hectolitre

Country	CIDER*	BEER	WINE**
ABV (%v/v)	5,0	5,0	13,0
Austria	0,00	24,00	0,00
Belgium	23,91	24,05	74,91
Bulgaria	0,00	9,20	0,00
Cyprus	0,00	30,00	0,00
Czech Republic	0,00	15,19	0,00
Germany	0,00	9,44	0,00
Denmark	69,46	32,68	150,98
Estonia	69,84	70,00	162,97
Greece	20,00	60,00	0,00
Spain	0,00	9,96	0,00
Finland	198,00	181,00	456,00
France	1,43	40,50	4,12
Croatia	0,00	26,55	0,00
Hungary	28,53	23,50	0,00
Ireland	94,46	112,75	424,84
Italy	0,00	35,88	0,00
Lithuania	127,00	54,85	254,00
Luxembourg	0,00	9,52	0,00
Latvia	77,00	49,00	134,00
Malta	2,00	23,00	20,50
The Netherlands	47,95	40,60	95,69
Poland	22,64	30,58	51,80
Portugal	12,06	24,13	0,00
Romania	2,01	12,78	2,01
Sweden	135,58	100,76	261,43
Slovenia	0,00	64,75	0,00
Slovak Republic	0,00	17,94	0,00

* Non-flavoured, < 3 bars | ** Still wine

Source: European Commission Excise Duty tables as at 01.09.2025

AICV labelling commitment for ciders and fruit wines

Members of AICV adopted a Memorandum of Understanding (MoU) on the provision of nutrition information and ingredient listing for cider and fruit wine sold in the EU. In its General Assembly of 17th of June 2021, members of AICV agreed upon a commitment on the provision of the energy value and list of ingredients on cider and fruit wine, as well as a number of specific principles and rules of implementation of these commitments. With that, AICV advocates for an ambitious self-regulatory approach that takes into account consumer information needs as well as sector specific aspects.

Concretely, signatories of this MoU commit to:

- Provide nutritional information per 100ml with the energy value in kJ/kcal on-label, while other nutritional information is optional and can be provided on-line
- Provide ingredient labelling, where ingredients must be listed in descending order of weight as recorded at the time of manufacturing following the provisions of regulation 1169/2011. This information will be made available either on-label, or on-line with on-label easy reference.

Signatories will support producers to meet the target dates to achieve market share (by volume) set out in this MoU:

- 65% of market to include the above by June 2025
- 75% of market to include the above by June 2026

These targets were approved by the AICV General Assembly held in Amsterdam in 2025.

AICV Members

The Heineken Company
Carlsberg Breweries A/S
C&C Group Plc
Kopparberg Brewery

Belgium
Konings N.V.

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 c/o Stonewell Cider –
The Independent Irish Cider Makers'
Association

Italy
Lucia Maria Melchiori SRL

Luxembourg
Ramborn Cider Co

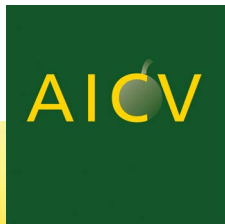
Poland
Polish Wine Council – Związek
Pracodawców Polska Rada Winiarstwa

Spain
Asociación Española de Sidras (AESI)

Sweden
AB Åbro Bryggeri

Observer members

Bucher Unipektin, Switzerland
Mosterei Möhl AG, Switzerland
Yablochny Spas, Russia
Heineken Beverages (South Africa) Pty Ltd



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AICV – European Cider and Fruit Wine Association

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AICV Transparency Register ID : 27459429876-64

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