



# AN APPLE A DAY...

Flavour creations for indulging ciders - all around the world

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## Cider, apfelwein, cidre – Same same, but different



Apfelwein, cidre or cider are beverages obtained by the partial or complete fermentation of the juice of apples, that may be derived from fresh juice, concentrates or both. The U.K. version of the drink is named **cider**, although the term is now **internationally used for alcoholic apple drinks** in general.

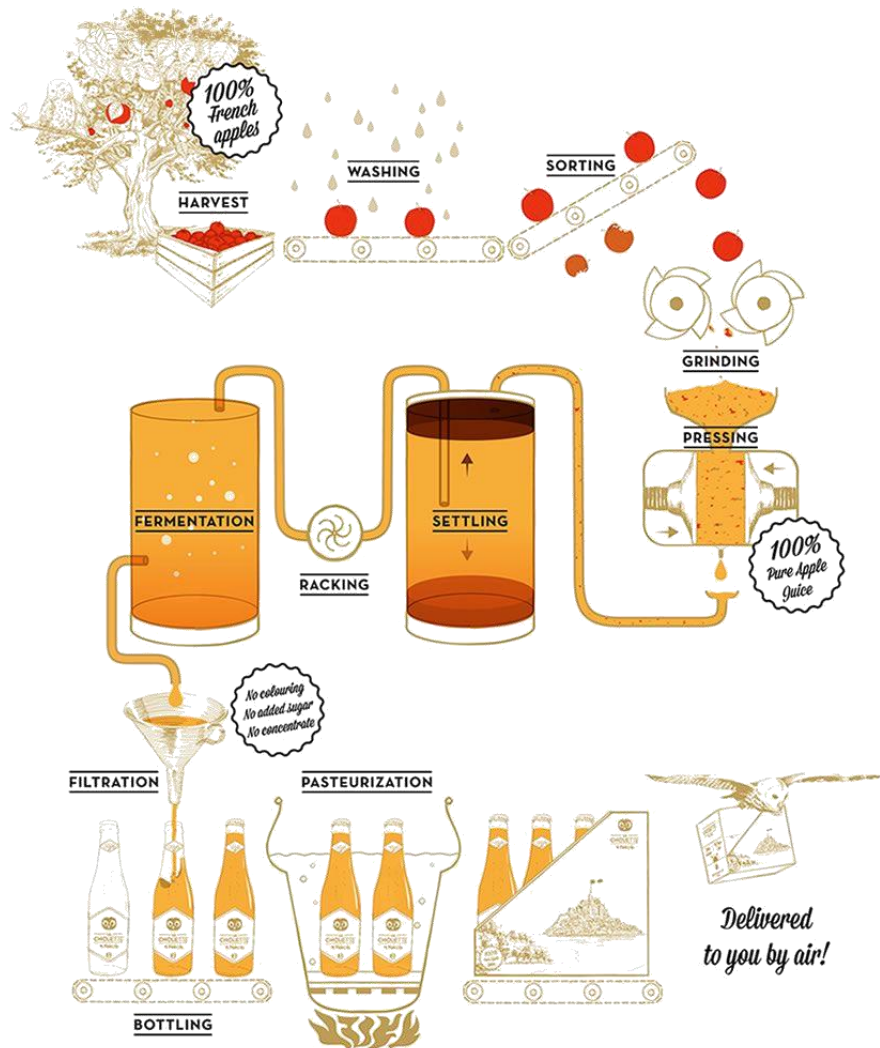
Depending on the origin and production method, the **mostly sparkling** beverage differs not only in name but also in terms of alcohol by volume (around 1,2% - 8%) and sugar content. Sometimes flavoured with different flavours or extracts, it is always gluten free.

Ciders fascination lays in the diversity of the apple varieties used, creating **unique** and **various taste experiences**.

Thus, **cider** is considered as a versatile drink that **continues to gain momentum** all over the world.



# The apple journey – From harvest to cider



## Oldie but Goldie

The Normans introduced cider in the UK. But the apple drink, spread throughout Europe by the Romans, has been around for over 5.000 years – so the legend.

## Tradition is key

From harvest to bottling – The apple journey hasn't changed much from the very beginning of cider production to nowadays.

## An apple for everyone

Over 10.000 apple varieties can be found worldwide. Cider manufacturers have a wide range to choose from, whether sweet and fruity or dry and green - The orchards offer it all.

# The global cider market – Expanding popularity

After a very dynamic performance of cider during the last years with a total **market volume of 2.331 million litres** in 2018, the volume growth has slowed down. The **annual growth rate** of the category is forecasted **1,7%** between 2015-2022.

But cider's **popularity is gradually expanding geographically** and there is still strong potential for manufacturers to succeed in mature markets by innovating around premiumisation as well as using influences of craft and wine.

## Top 10 cider consuming countries | Total volume in million litres | global 2017/2018



### 01 UK

800 M. litres

### 02 South Africa

280 M. litres

### 03 USA

195 M. litres

### 04 Australia

175 M. litres

### 05 Spain

108 M.

### 06 Canada

86 M. litres

### 07 Argentina

83 M. litres

### 08 France

76 M. litres

### 09 Ireland

71 M. litres

### 10 Germany

68 M. litres

# The global cider market – Who is driving the category?



# Market insights – Cider in Europe

New product launches within the cider category // **Europe** (01/2015 – 11/2018)

Top Flavours	Share (% of all NPD)
<b>Apple</b>	<b>61,5%</b>
Raspberry	2,3%
Elderflower	2,3%
Lime & Strawberry	2,2%
Blackberry	1,7%
Fruit	1,6%
Red Berry	1,4%
Cherry	1,3%
Strawberry	1,3%
Blueberry	1,2%

Number of  
New Launches:

**899**

Branded  
**90,9%**

Private Label  
**9,1%**

Launch Type	Share (% of all NDP)
New Product	40,5%
New Variation/Range Extension	30,4%
New Packaging	26,6%
Relaunch	2,4%
New Formulation	0,11%

# Market insights – Classic ciders in Europe

Classic apple cider continues to **dominate the cider volumes** in Europe and on a global scale. But...



Thatcher's ciders | Gold, Cloudy, Other Varieties | Thatchers cider Company Ltd, UK



Strongbow ciders | Gold Apple, Original Dry | Heineken NV, Netherlands



Orchard Thieves | Apple cider | Heineken NV, Netherlands



# Market insights – Fruit ciders in Europe

...the balance shifted increasingly towards flavoured ciders. **Fruit flavoured ciders** now account for **27% of all ciders** consumed, with a total growth of +330% in the past 12 years.



Kopparberg ciders | Raspberry, Mixed Fruits, Strawberry & Lime, Elderflower-Lime | Kopparbergs Bryggeri AB, Sweden



Rekorderlig ciders | Strawberry-Lime, Passionfruit, Wild Berries, Mango-Raspberry, | Abro Bryggeri AB, Sweden



Somersby ciders | Blackberry, Citrus Fruit, Elderflower-Lime, Blueberry | Carlsberg A/S, Denmark

# Cider in the UK – A league of their own

## The world's biggest cider market

Cider has had a value of **3.45 billion Euro** in the UK in 2017. The cider consumption in the UK (**800 million litres per year**) would be enough to fill 5 million bath tubs. In total around **45,5%** of all UK households **buy cider**. The british love for cider led to a **volume growth of 2,2%** from 2017 to 2018.

Who consumes cider in the UK?



## Cider is big business in the UK

UK cider **exports** are worth over **115 million Euro per year** and 10.900 jobs depend on the cider UK industry. The UK is one of the markets **leading the premiumisation** of cider. Consumers are increasingly attracted to higher quality ciders, which come with higher price tags attached and thus benefit producers through higher margins, resulting in a **value growth of 3,5%** from 2017 to 2018.

# Cider in the UK – A league of their own

## On-trade figures 2017/2018



**2,1 billion Euro**

Is spent on cider & perry  
on-trade

**505 million**

Pints or 287 million litres of cider &  
perry are consumed

**71%**

Of on-trade volume is draught serve  
and 29% is served packaged

**4,42€**

Is the average price for a pint of  
cider

Apple cider accounts for **63%** of total consumption, followed by fruit  
cider with 36% and perry with 2%



# Cider in the UK – A league of their own

## Off-trade figures 2017/2018

**1.3 billion Euro**

Is spent on cider & perry off-trade, so the category accounts for 7.4% of UK consumers total spendings on alcohol in this channel

**513 million**

Litres of cider and perry are purchased

**2,51€**

Is the average price for cider per litres in UK shops

Apple cider accounts for **59%** of total consumption, followed by fruit cider with 33% and perry with 8%







## Consumer trends in the cider category

Cider remains a **highly cyclical category**, with seasonality being of great importance. The category has evolved through trends such as the over-ice trend, cider-based cocktails, flavour-led launches, spirit-ciders (“spiders”) and wine-inspired positioning. Cider and food pairings are also growing in popularity.

The aim of such initiatives is to improve general perceptions of the category and to **highlight** the wide range of **tastes and flavours** available.

**Innovation** remains the category’s **primary growth driver, especially in mature markets**. Global consumer macro trends, such as the **health and wellness trend** or the higher demand for **premium** products also influence the category.

# Consumer Trends in the cider category

In well-established cider markets such as the UK, the category is beginning to diverge. A split is beginning to form between **value, mass consumption ciders** and **more premium**, higher-quality options. A middle ground, which takes aspects of both, is also developing.

There is not only a growing segmentation within the cider category but also an increasing shift towards flavoured, **fruit ciders** for multiple reasons.

- **Sweeter flavour** profiles have **revitalised** the cider category
- Fruit Ciders enter **new target groups**, such as females or younger consumers





## Consumer trends in the cider category

### Premiumisation and Authenticity

The demand for products with **authenticity and heritage** is ongoing across alcoholic drinks, and cider is no exception.

- Focus on the **origins of products** and strong impact of the craft trend
- Benefits from the inherently “natural” associations of apples
- Health-conscious consumers prioritise **quality over quantity**
- Growing consumer interest in **premium products**
- **Premiumisation and indulgence** now became the top drivers of the global beer and cider market.





## Consumer trends in the cider category

### Premiumisation and Authenticity

- Cider manufactures start to innovate around premium products with **focus on high-quality ingredients**
- Increasing **concern about provenance and production** and demand for a **compelling narrative** behind brands, especially among younger consumers
- Emphasising a **brand's story** becomes a **key focus** in marketing strategies
- Aim to maintain an established consumer base while attracting **younger consumers in search of authenticity**

The challenge for cider producers is not to devalue the term “craft” by overusing it as this leads more and more to untrustworthiness among consumers.



# Consumer trends in the cider category

## Health & Wellbeing

Consumers are moving to a **healthier relationship with alcohol consumption** due to the growing popularity of health conscious lifestyles. **37% of global consumers plan to cut down on alcohol** for health reasons and low/no alcohol beers and ciders are rising in credibility and acceptance.

- Growing **opportunities** for the cider category
- Consumers focus on quality, taste and flavour over alcohol content
- “Heritage” cider producers are in a strong position as they fulfil those consumer needs
- Great challenge to **demonstrate** these **credentials with lower alcohol products**



# Consumer trends in the cider category

## Food Pairing

In search of new taste sensations, consumers have started to venture out from their comfort zones and explore more unusual food and drink matches. This will drive the demand for more specific food/drink pairing.

- Wine is the most popular alcoholic beverage choice for food pairing, followed by beer and spirits
- Growing opportunities for cider manufacturers to **take a share of occasions from wine** – Such as celebratory occasions or even higher-end dinner
- Ciders need to find new eye-catching ways how to be paired with food more explicitly







## An apple a day...

Get in touch with taste and discover Bell's flavour creations for indulging ciders – all around the world

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## An apple a day – Flavour creations for indulging ciders

- **Authentic and fresh taste profiles** with a constant quality - Bell's flavours give **ciders** a particularly long-lasting and exciting taste.
- We know the main markets and offer a range of tailormade apple flavours to meet **the regional taste preferences** of customers.
- Use of **natural flavours**, which are based on current consumer trends and requirements for clean labelling.
- Suitable for **various beverage applications**, e.g. ciders, carbonated soft drinks, juice drinks.
- **Unique creations** to give classic cider a special twist.
- **Extend** your **product portfolio** and create new taste experiences for your consumers.





## Indulging ciders – all around the world

Worldwide more than 10.000 apple types could not be more varied in taste: From grassy green to fruity ripe, there is **the right choice for every apple lover.**

But which culinary apples are the most popular? Bell has evaluated the **regional taste preferences** of apple consumers and identified the most common apple types in Europe and Asia.

Based on these findings, Bell's flavourists and sensory experts have created a range of indulging apple flavours – **tailormade to meet the taste needs of consumers all around the world.**

# The apple choice – Regional taste preferences





# Cider Type Golden Delicious

## 3250006 Apple Flavour Golden Delicious

Sugar g/l	90
Ethanol % Vol.	4,2
as. Citric Acid g/l	2,3
Carbonation g/l	4,0



*Ingredients: Cider, Sugar, Water, Natural Flavouring, Acidtiy Regulator*

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# Cider Type Jonagold



## 3450157 Apple Flavour Jonagold

Sugar g/l	90
Ethanol % Vol.	4,3
as. Citric Acid g/l	2,5
Carbonation g/l	3,5



*Ingredients: Cider, Sugar, Water, Natural Flavouring*

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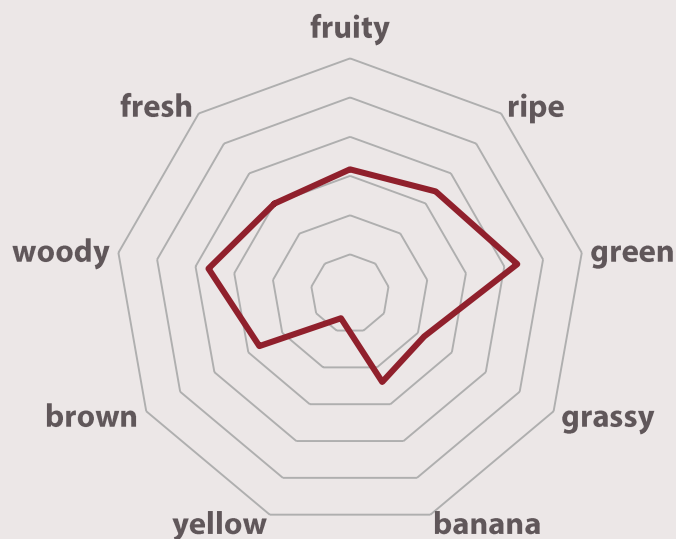
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# Cider Type Boskoop

## 3450106 Apple Flavour Boskoop

Sugar g/l	90
Ethanol % Vol.	4,3
as. Citric Acid g/l	4,5
Carbonation g/l	3,5



*Ingredients: Cider, Sugar, Water, Natural Flavouring, Citric Acid*

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# Cider Type Cox Orange



## 0527242 Apple Flavour Cox Orange

Sugar g/l	90
Ethanol % Vol.	4,3
as. Citric Acid g/l	3,0
Carbonation g/l	3,5



*Ingredients: Cider, Sugar, Water, Natural Flavouring, Citric Acid*

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# Cider Type Pink Lady

## 0550036 Apple Flavour Pink Lady

Sugar g/l	90
Ethanol % Vol.	4,3
as. Citric Acid g/l	2,0
Carbonation g/l	3,5



*Ingredients: Cider, Sugar, Water, Natural Flavouring, Acidity Regulator*

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# Cider Type Elstar

## 3450156 Apple Flavour Elstar

Sugar g/l	90
Ethanol % Vol.	4,3
as. Citric Acid g/l	2,9
Carbonation g/l	3,5



*Ingredients: Cider, Sugar, Water, Natural Flavouring, Citric Acid*

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# Cider Type Granny Smith



## 3450158 Apple Flavour Granny Smith

Sugar g/l	90
Ethanol % Vol.	4,3
as. Citric Acid g/l	4,0
Carbonation g/l	3,5



*Ingredients: Cider, Sugar, Water, Natural Flavouring, Citric Acid*

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# Cider Type Fuji

## 0528080 Apple Flavour Fuji

Sugar g/l	90
Ethanol % Vol.	4,2
as. Citric Acid g/l	2,5
Carbonation g/l	3,5

*Ingredients: Cider, Sugar, Water, Natural Flavouring*





# Cider Type Red Delicious

## 3450159 Apple Flavour Red Delicious

Sugar g/l	90
Ethanol % Vol.	4,3
as. Citric Acid g/l	2,5
Carbonation g/l	3,5

*Ingredients: Cider, Sugar, Water, Natural Flavouring*



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