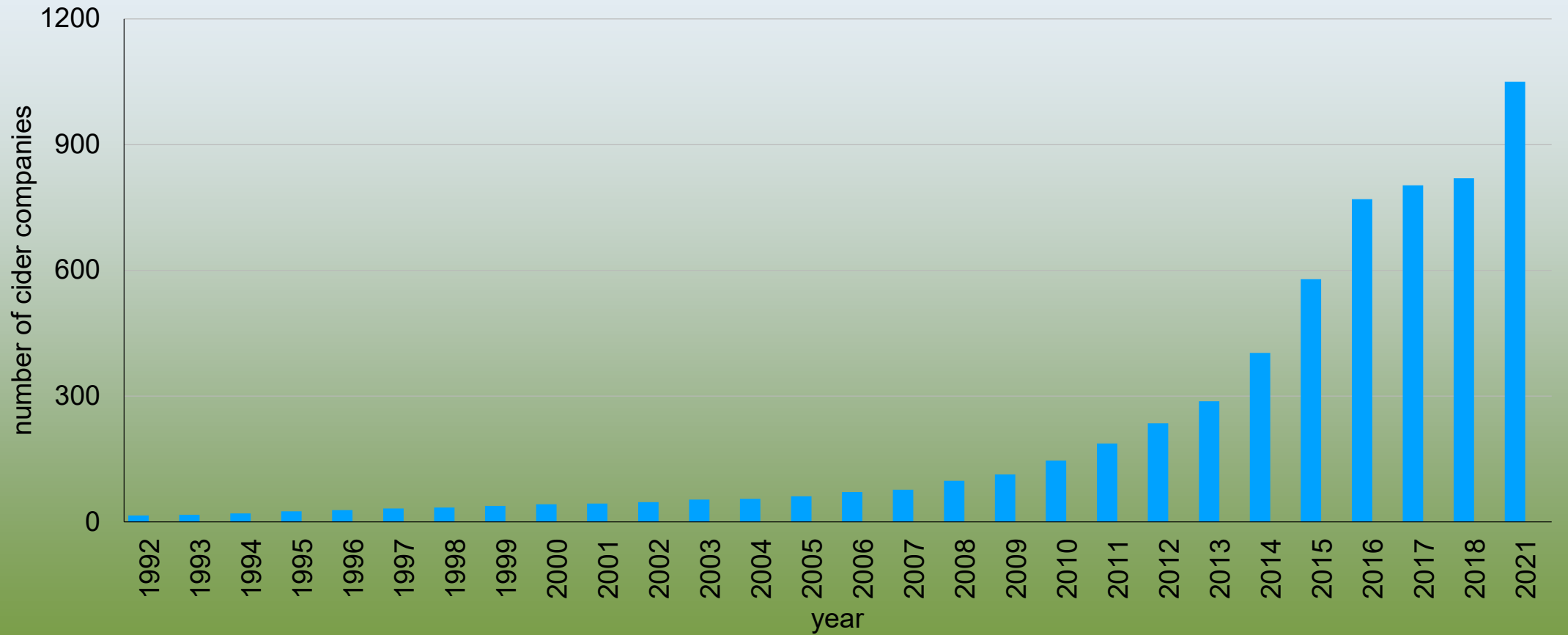


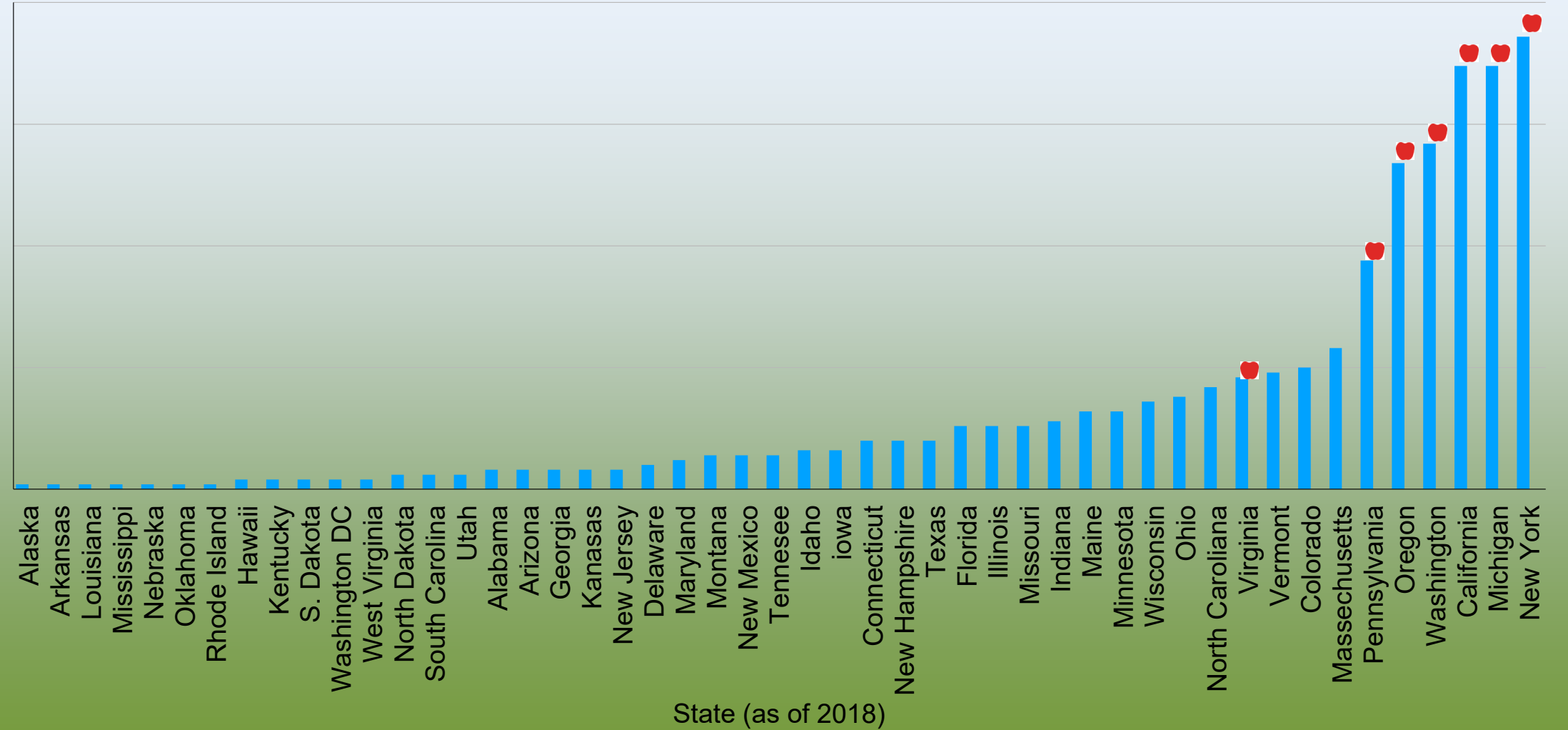
U.S. Cider Market Overview

Darlene Hayes

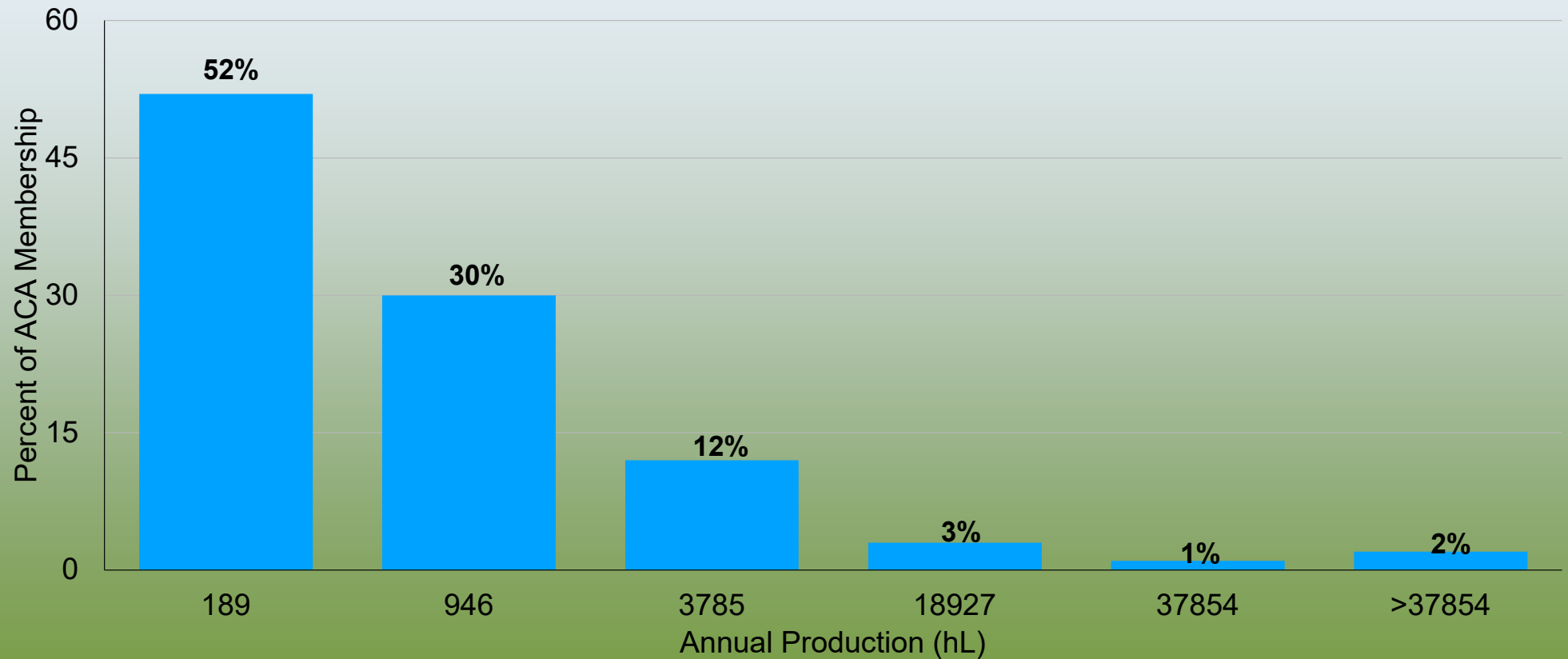
U.S. Cider Market Today - Companies by Year



U.S. Cider Market Today - Companies by State

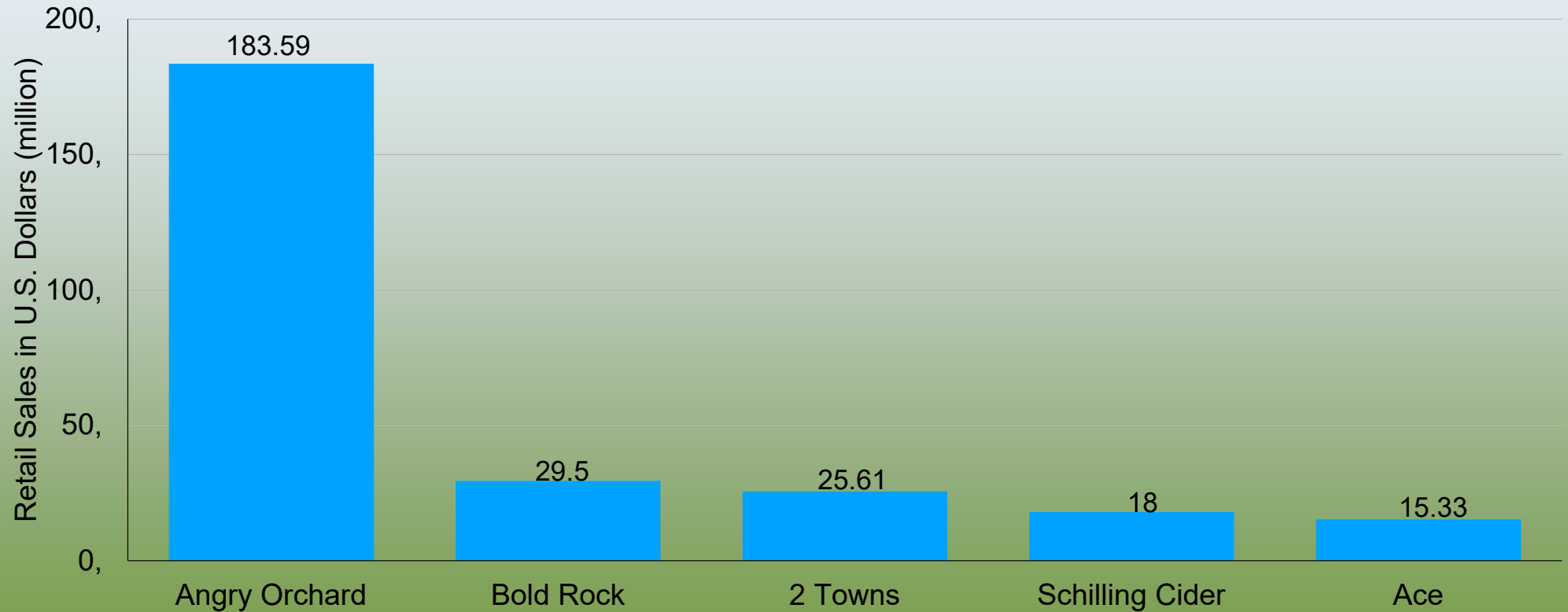


Company Size as Measured by Production



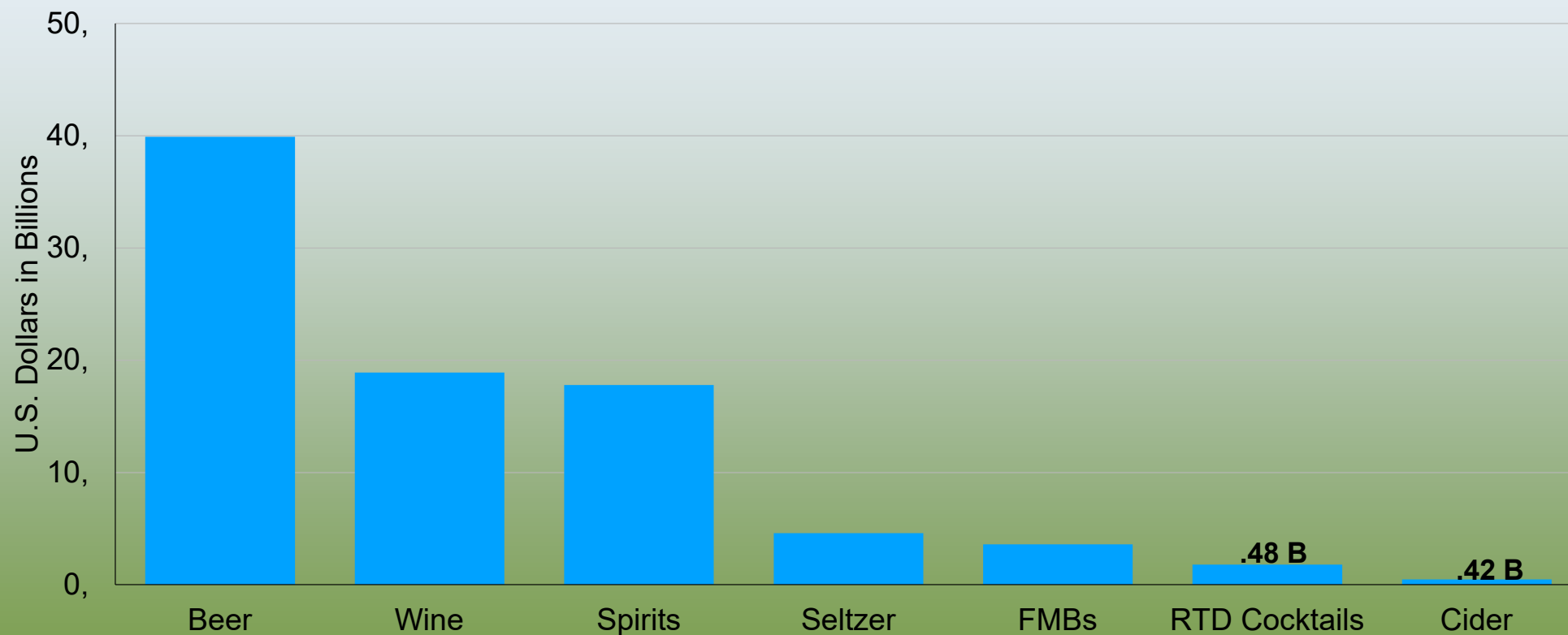
Data from ACA Membership, 2021

Top 5 U.S. Cider Brands (end of 2022)



Data from Statista.com, released 24 March 2023

U.S. Adult Beverages Market - Off-premise Sales



Data from IRI, 2022

What's Not in Most Published Data

- Data companies get data from retail sales at large chain stores and hospitality venues (bars/restaurants)
- Often reported as a percentage of the beer category as that is the way much US cider is positioned and distributed
- Does not include DTC, cider clubs, smaller local/regional stores/hospitality
- Most smaller companies rely heavily on local/regional sales and DTC
- American Cider Assn. working to gather data not captured by traditional data companies to get a fuller picture of the U.S. cider market

U.S. Cider Styles

- 60% of sales 100% apple-based, 40% apple plus another fruit, light-bodied, easy drinking
- Significant amount of production based on bulk juice from apple varieties grown for the fresh market
- Harvest Ciders - defined by the ACA as “primarily produced once per year from fruit picked and pressed close to seasonally peak ripeness”
- 60% made from high-tannin or heirloom apples purpose grown for cider production
- Tend to be produced and marketed more like wine
- ACA data indicates a 30% median growth rate in harvest cider production between 2020 and 2021; segment continues to grow

U.S. Cider Market Overview

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