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CIDER'S PUBLIC HOUSE RULES

Cider Report 2025

INTRODUCTION

"Cider is part of our heritage and culture, and is synonymous with the British pub. In fact, when it comes to Cider, the UK really is the world leader. The market here is twice as big as the next largest (South Africa) and a massive 5 times bigger than the likes of the US and Australia.[1]

There are challenges that Cider must grapple with, not least the move towards moderation of alcohol consumption, but also the ever increasing range on offer in pubs and bars and shifting consumer tastes. All of these are leading to the loss of taps and Cider outlets across the country.

However, we have been drinking Cider in one form or another from as far back as 3,000BCE and Cider remains one of the UK's most popular tipples. It is an essential part of a quintessential pub experience and with new products and innovation coming through all the time, it remains an exciting and dynamic category.

This report is designed to show the state of the market, how Cider is evolving and how operators can tailor their offer to enhance their Cider and grow their Cider sales. We have every confidence in the Cider category and we hope this report helps you to maximise your sales."

William Rice
On Trade Director
HEINEKEN UK

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1. GlobalData: https://www.just-drinks.com/news/in-data-europe-continues-to-drink-lions-share-of-Cider-led-by-uk/

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WE NEED TO TALK ABOUT CIDER

Cider is worth £2bn[2] to UK pubs, bars and restaurants and had been growing faster by value than any other alcohol category in the market for several years up to Autumn 2024[3]. Despite a slower end of the year for the category, following this steady growth, 2025 is shaping up to be an excellent year for Cider in the on-trade.

Across the last 12-months alone, an impressive 342 million[4] pints of Cider and around 114 million bottles[5] have been sold and enjoyed across the on-trade. Over the last two years, Cider has seen a 5% value growth[6] with draught being a particular bright spark, outperforming packaged. With volume seeing a 3% decline[7], it shows how the category is driving value into the market, and how consumers are premiumising.

Apple Cider still leads the way within the category, responsible for two-thirds of the Cider market, with Flavoured largely responsible for the remainder[8]. Premium Flavoured Cider on draught is particularly worth calling out here, as it continues to grow in popularity and has played (and continues to do so) a significant role in driving premiumisation in the cider sector.

From a brand perspective, Inch's goes from strength to strength and has been the fastest growing Cider in the last year[9]. This is followed in second place by Old Mout[10], which demonstrates the importance of offering a range of Cider options in outlets - and we will be touching on the different roles each type of Cider has on the bar later in the report (see page 16).

All this has come in the face of considerable market pressures. Cider isn't the only category to face these, of course, all alcohol is battling against headwinds that include a contracting on-trade market and the move to moderation. By the end of 2024 alcohol consumption was estimated to have dropped 20% in the UK since 2019[11].

However, Cider continues to be a major force in the UK on-trade and with plenty of innovation set to hit the market in 2025 and, with an exciting pipeline of new flavours, serve styles, premiumisation, and more, there is plenty for Cider fans and Cider sellers to get excited about.

342M[13]
pints and around
117M[14]
bottles of Cider sold across the last **12 months.**

APPLE VS FLAVOURED: VOLUME[12]

Apple
63.7%

Flavoured
35.9%

Pear/Other
0.3%

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2. CGA OPMS GB Value Sales MAT TY to P13 28.12.24
3. CGA OPMS GB Value Sales MAT TY vs 2YA to P13 28.12.24
4. CGA OPMS GB Cider Draught Volume Sales MAT TY to P13 28.12.24
5. CGA OPMS GB Cider Packaged Volume Sales MAT TY to P13 28.12.24
6. CGA OPMS GB Value Sales MAT TY vs 2YA to P13 28.12.24
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8. CGA OPMS GB Value Sales MAT TY to P13 28.12.24
9. CGA OPMS GB Value Sales MAT TY vs LY to P13 28.12.24
10. CGA OPMS GB Value Sales MAT TY vs LY to P13 28.12.24
11. Statista https://www.statista.com/topics/3281/alcohol-use-in-the-united-kingdom/
12. CGA OPMS GB Volume Sales MAT TY to P13 28.12.24
13. CGA OPMS GB Cider Draught Volume Sales MAT TY to P13 28.12.24
14. CGA OPMS GB Cider Packaged Volume Sales MAT TY to P13 28.12.24

CIDER MATTERS

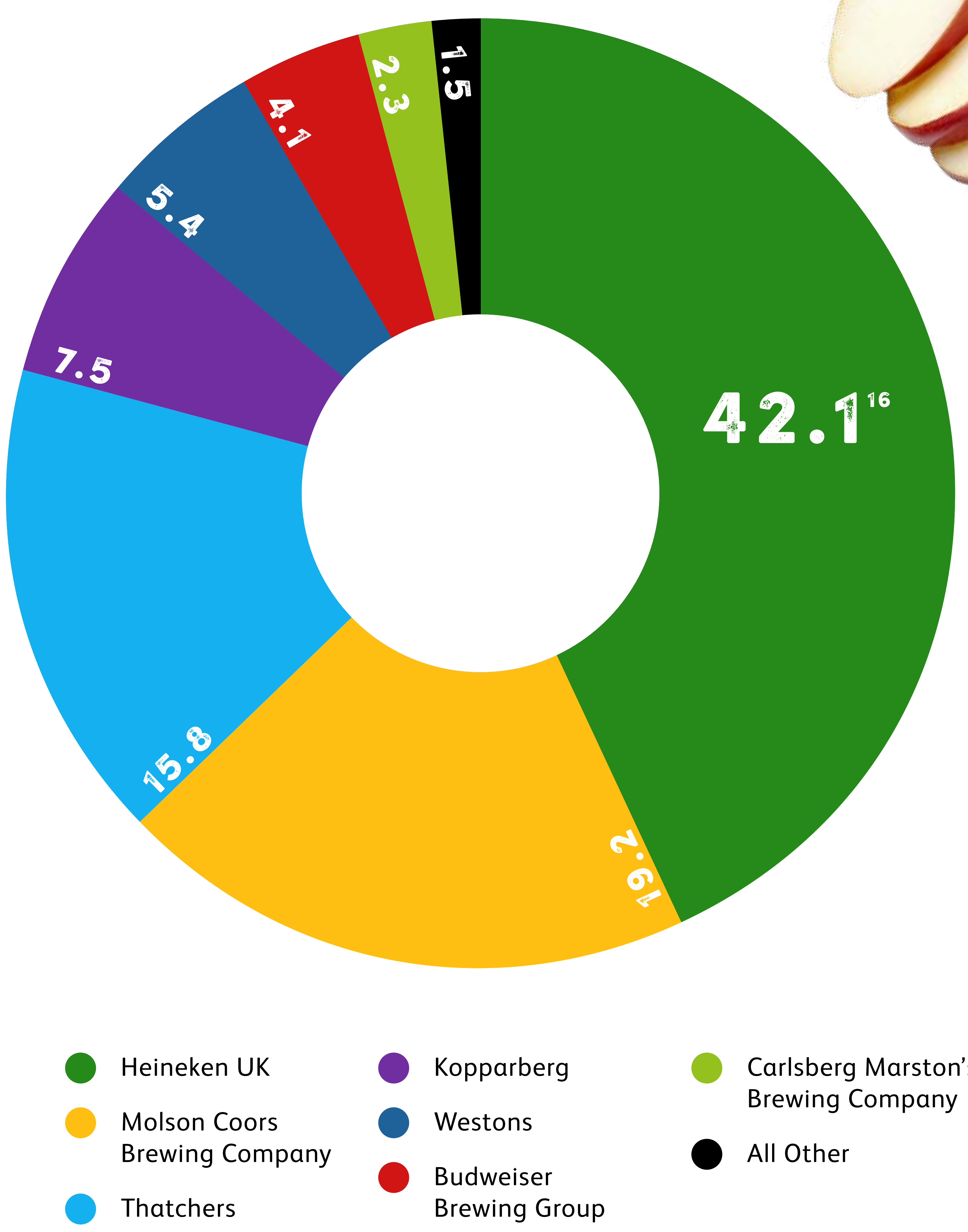
AT HEINEKEN UK WE TAKE CIDER SERIOUSLY.

WE ARE THE BIGGEST CIDER PRODUCER IN THE WORLD AND HAVE 42.1% VALUE SHARE (MAT) IN THE UK ON-TRADE.

THIS IS UP 3.2 PERCENTAGE POINTS YEAR ON YEAR AND IS TWICE THE SIZE OF OUR NEAREST COMPETITOR[15].

We have a long standing heritage, with brands such as Bulmers and Inch's both established more than 100 years ago and, like all of our Ciders, produced with 100% British apples.

Moving the category forward with new product development and investment in campaigns and support, is also at the very heart of what we do to help the category and the on-trade thrive.



15. CGA OPMS GB Value Share MAT TY vs LY to P13 28.12.24
16. CGA OPMS GB Value Share MAT TY to P13 28.12.24

TOP 5 BRANDS BY VALUE (£M)

	APPLE DRAUGHT[17]		FLAVOURED DRAUGHT[18]		APPLE PACKAGED[19]		FLAVOURED PACKAGED[20]	
1	Strongbow Original	£229M	Strongbow Dark Fruit	£138M	Magners Original	£30M	Rekorderlig Strawberry & Lime	£71M
2	Inch's	£203M	Old Mout Berries & Cherries	£56M	Bulmers Original	£26M	Kopparberg Strawberry & Lime	£66M
3	Thatchers Gold	£202M	Carling Black Fruit Cider	£35M	Aspall Suffolk Cyder	£9M	Rekorderlig Wild Berries	£55M
4	Aspall Cyder	£130M	Thatchers Apple & Blackcurrant	£18M	Rekorderlig Apple Cider	£5M	Kopparberg Mixed Fruits	£52M
5	Stowford Press	£77M	Rekorderlig Strawberry & Lime	£13M	Thatcher's Haze	£3M	Old Mout Berries & Cherries	£49M

Figures rounded to nearest £m

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17. CGA OPMS GB Value Sales MAT TY to P13 28.12.24
18. CGA OPMS GB Value Sales MAT TY to P13 28.12.24
19. CGA OPMS GB Value Sales MAT TY to P13 28.12.24
20. CGA OPMS GB Value Sales MAT TY to P13 28.12.24

TOP GROWING BRANDS BY VALUE[21] (£M)

		Added Value last 12 months
APPLE DRAUGHT	Inch's	£71M
FLAVOURED DRAUGHT	Thatchers Apple & Blackcurrant	£18M
APPLE PACKAGED	Bulmers Original	£1M
FLAVOURED PACKAGED	Old Mout Berries & Cherries	£8M

Figures rounded to nearest £m

THE VIEW FROM CGA BY NIQ

“

Cider remains a crucial part of the Long Alcoholic Drinks category in Britain and the pub sector is highly important for the category. ‘Premium Local’ pubs are a key segment for cider, holding a 19.4% share of total cider sales, while free trade pubs remain the largest tenure, closely followed by managed, which is also in growth.

Consumers who drink cider are actively engaged with the on-premise and drinking out more frequently than they were a year ago. Apple and Premium Flavoured ciders are growing in share, indicating the need to cater to different consumer preferences and pub operators should note that Draught Cider is on the rise, maintaining a majority share of volume sales, while packaged cider has seen declines.

With consumers focused on value and navigating the cost-of-living crisis, a dual strategy catering to both draught and packaged cider consumers is essential.

Cider is one of the most brand-loyal categories in the on-trade - over three quarters of cider consumers specify a brand when ordering, which is five percentage points higher than the average consumer. Additionally, almost two in five purchasing decisions are influenced by the availability of favourite brands, making it a more significant driver than value and quality. With loyalty being so crucial, suppliers must ensure the right cider brands are stocked in the right outlets.

”

CGA Powered by NIQ

Rachel Weller
Commercial Leader at CGA by NiQ

21. CGA OPMS GB Value Sales MAT TY vs LY to P13 28.12.24

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THE CIDER SITUATION

Cider is subject to the same myriad challenges facing every drinks category in the on-trade. The cost-of-living crisis, lower frequency of on-trade visits, changing consumer preferences to different social experiences, and moderation becoming more mainstream, has had an impact on all.

Further to this, Cider faces seasonal challenges like no other drink on the bar due to its strong association with being a 'summer' serve. There are also varying regional perceptions, for example Cider is responsible for over a quarter (27%) of total on-trade beer and cider volume sales in the South West[22] compared to 13% across the country as a whole[23].

However, Cider remains one of the key drinks in British pubs and bars. Volume wise, Cider is the second biggest alcohol category in the UK on-trade[24] and is selling more than wine – and if consumers expect a pub or restaurant to offer wine, they most certainly expect to find a cider or two. One of the opportunities for the category is premiumisation to help bridge the gap between value and volume and in order to become even more profitable for businesses. And this is just one of a number of opportunities facing Cider right now.

2ND
BIGGEST ALCOHOL CATEGORY

22. CGA OPMS South West Value Share MAT TY to P13 28.12.24
23. CGA OPMS GB Value Share MAT TY to P13 28.12.24
24. CGA OPMS GB Volume Sales MAT TY to P13 28.12.24

CIDER SOLUTIONS

SEASONALITY

CHALLENGE

CIDER IS A SEASONAL PRODUCT THAT PERFORMS BETTER IN THE SUMMER MONTHS...

SOLUTION

The sun is Cider's greatest salesperson so be prepared for heatwaves by ensuring your outside space is in prime condition. Make hay while the sun shines but also be innovative in autumn and winter months by considering flavour profiles such as dark berries and styles such as mulled cider. No and Low Alcohol variants can work well throughout the year but may gain even more uptake in January.

REGIONALITY

CHALLENGE

CIDER IS ONLY REALLY POPULAR IN THE SOUTH WEST...

SOLUTION

Sure, the South West is a stronghold but cider is popular across the country and is actually growing in share across all regions over the last two years[25]. The key is to know your customer base and what suits them because there is a cider for all (see next section).

SPACE ON THE BAR

CHALLENGE

WHY BOTHER WITH A TAP FOR FLAVOURED CIDER WHEN IT CAN BE REPLICATED IN THE FRIDGE?

SOLUTION

If bar space is an issue a second cider tap for flavoured can face pressure for its position. However, our research shows total wet sales get an uplift with the addition of a flavoured cider tap. When draught is added, packaged sales are barely affected[26], highlighting the key role cider has in the fridge and on tap.

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25. CGA OPMS GB Value Share MAT TY v 2YA P13 28.12.24
26. CGA NIQ Volume Pool Data to July 2024

THE OPPORTUNITIES

There are plenty of reasons to be optimistic about the Cider category in the UK on-trade and many opportunities for licensees to boost Cider sales in their venues, including:

76% of consumers see Cider as good value for money[27] which is more than any other category – importantly, this is something that shouldn't be confused with 'cheap'.

Consumers are very clear that good value means good quality for a price they are prepared to pay. And this perception of it as good value means that Cider is appealing during financially challenging times.

The value of Cider makes it a popular choice for many initial experiences in the on-trade.

This means there are ways of growing the category as customer choices and taste profiles develop.

Cider drinkers are also open to trading up within their favoured category.

In fact, 46% of Cider drinkers would trade up within the category[28]. This means that offering the right range is key in order to maximise the value of the category.

There is also the opportunity to tempt consumers from other alcohol categories:

41% of soft drink drinkers drink cider in the on-trade, as do 33% of wine drinkers, 32% of cocktail lovers, 30% of lager drinkers and 20% of gin drinkers[29].

27. CGA by NIQ Consumer Pulse, January 2025. Sample: 377
28. CGA Brandtrack October 2024
29. CGA Brandtrack October 2024

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As the second largest alcohol category by volume, it is clear that all sizes and sorts of venues should have a cider offer and by tapping into some, or all, of the above factors, we can identify a clear way to help boost sales over the bar. Training staff to offer trade up to more premium options for example, borrowing some tricks from the craft beer scene to promote your Cider offer, and calling out what great value for money this heritage British drink really represents.

In food-led pubs or the fine dining end of the market, where fine Ciders are competing for space on wine lists, stocking a super-premium Cider is a great opportunity to boost spend. Promote it in the same way you would your wine, and cross-promote it with dishes that proves a good match on the menu will work well. Replacing Cider in dishes where white wine may more traditionally be used is also a good way to promote your Cider offer – for example Mussels in Cider or chicken in a cider & cream sauce.

No and Low Alcohol is another opportunity. We know from consumer research that when switching to No and Low Alcohol alternatives, people remain category loyal, which means Cider drinkers will look for a non-alcoholic Cider. To this end, licensees should think about ensuring No and Low Alcohol Ciders are given prominence in the fridge, as well as on marketing (PoS) materials on the bar and on tables.

For venues that already have a well-developed Cider offer, then Cider-based cocktails are a great way to offer something new and exciting - see more about this on page 31.

SUSTAINABILITY

FLAVOUR, FORMAT AND PRICE ARE NOT THE ONLY CONSIDERATIONS DRIVING CONSUMER CHOICE.

Where and how their drink is produced and reaches the bar is an ever-growing factor. A total of 45% of drinkers find Cider with environmental credentials more appealing[30].

Luckily, Cider is made using local ingredients – for example all Inch's Medium apples come from within 40 miles of the mill – and this and stories like it should be promoted and celebrated more prominently within venues.

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30. Mintel's UK Cider Market Report 2023

THE IMPORTANCE OF CIDER

Cider remains a staple for the vast majority of pubs and bars in the UK and consumers view it as a key part of the quintessential pub and bar experience. In fact, 79% of consumers say it is an important consideration when choosing where to visit[31].

It has a far more even gender split than similar categories, with a 60/40 male/female split compared to the 75/25 we see in beer[32] and is popular across demographics as well. This is because, while the majority of Cider drinkers lie in the 34 to 49 year range, it over indexes in comparison to other alcohol categories for 18 to 34-year-olds at the same time[33].

Our insight does show, however, that while cider has more fans of packaged than beer, the majority still prefer draught and so this is where the opportunity lies for operators[34].

PREFERRED CHOICE OF SERVE (CIDER CONSUMERS)[35]

42%
Draught (pint)

31%
Served from a bottle, in a glass, over ice

9%
Draught (half pint)

19%
Served from bottle, in a glass, no ice

31. CGA Brandtrack October 2024
32. Kantar Alcovision On-Trade Drinkers 12 m/e 30.09.2024
33. Kantar Alcovision On-Trade Drinkers 12 m/e 30.09.2024
34. CGA Brandtrack August 2024
35. CGA BrandTrack August 2024

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WHEN DO PEOPLE DRINK CIDER?

CIDER DRINKERS PREFER TO DRINK IN A RELAXED ENVIRONMENT, WITH RESEARCH BY CGA[36] SHOWING 75% ENJOY CIDER DURING A RELAXED SOCIAL OCCASION, RISING TO 79% AT CASUAL MEALS.

That's not to say it doesn't have its role to play in higher-tempo occasions though, as Cider drinkers tend to over-index in some of the most key on-trade occasions. Whether it be live sport or late night, there is an opportunity for operators to sell more cider during these visits as well as the lower key, sunny occasions it is more closely associated with.

TOP 5 CIDER DRINKING OCCASIONS IN THE UK ON-TRADE[37]

1	A catch up with a small group of friends
2	Special occasion/celebration
3	Family occasion
4	Boozy meal with friends
5	Bar/pub crawl

OCCASIONS CONSUMERS "OVER-INDEX" VS THE AVERAGE CONSUMER

1	A catch up with a small group of friends
2	Family occasion
3	A quick drink
4	Special occasion/celebration
5	When travelling

36. CGA OPUS June 2024
37. CGA Brandtrack August 2024

THE BORI'S BRILLIANT CIDER SELECTION

The Boringdon Arms, known to everyone locally as 'The Bori', is an 18th Century traditional, family and dog friendly pub, situated on the waterside in the village of Turnchapel in Plymouth. We are on the South West Coastal Path and so get plenty of walkers and cyclists passing through, as well as locals.

We are a former CAMRA Regional Pub of the Year and pride ourselves on our homecooked food, range of quality beers and ales, and our cider selection.

We have a huge variety of ciders on offer, from on the bar where we offer a range spanning apple cider, hazy cider, and a fruit ciders; to in the fridge where we stock both apple and flavoured ciders. On top of this, we offer traditional still ciders from bag-in-box. Making sure we have a balance of big and small brands, a permanent range to bring consistency mixed with a rotational range that adds some interest and excitement, is the key to our success with cider, I think.

We're also lucky enough to have two outdoor spaces, which we bring to life in the summer as cider gardens. We used branded merchandise to help us do that and build on that by offering cider- themed dishes and cocktails and just champion everything there is to love about apples!

Jordan Baker
GM, Boringdon Arms, Plymouth

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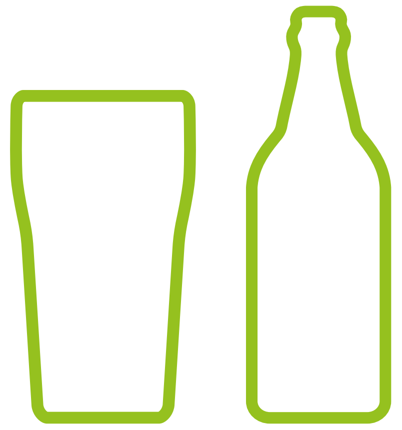
HOW TO CHOOSE A CIDER

CATEGORY	FORMAT	SEGMENT	SIZE	BRAND
What type of drink do i want?	**Draught or bottles?**	**Type of Cider?**	**Pint or half?**	**Final decision?**
				
Lager, red wine or whisky?	Pint or bottle?	Mainstream Apple or Premium Flavoured?	Pint or half?	Pint of Strongbow!

Only 80% of consumers see these elements as intrinsic to the occasion and so have pre-chosen when arriving at outlet

Unless extremely familiar with the outlet then consumers cannot have pre-chosen final brand and so this is done in outlet

Only half of consumers[38] have a pre-determined brand in mind when they are choosing a cider in the on-trade, according to our research. So how do drinkers decide what to buy?

Perhaps surprisingly, the vast majority of customers (80%) have pre-chosen a number of elements of the decision making process before they arrive[39] – these include, the category of drink (beer, cider, wine, sprit or soft drinks), whether it'll be in glass or bottle, the segment (mainstream or premium), and the size of the measure (pint or half, when it comes to cider). However, it is only when they are in venue and can see the brands available can they make their final choice and so visibility of brands is key.

38. Heineken Path to Purchase Reserach
39. Heineken Path to Purchase Reserach

CIDER'S ROLE ON THE BAR

WHILE CIDER IS OFTEN CONSIDERED AS A PACKAGED PRODUCT, IN FACT OVER HALF OF CONSUMERS PREFER CIDER ON DRAUGHT[40].

This demonstrates a real desire for the category as a draught option and represents a clear opportunity for operators to offer a tempting range both in the fridge and on the bar, across Flavoured and Apple Cider.

40. CGA BrandTrack August 2024

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THE ROLE OF DRAUGHT CIDER

When it comes to letting customers know what ciders you have on offer, the prominence of draught and how it catches the eye should not be overlooked. It's the showstopper, the first cider customers see and it plays the part of introducing customers to your range.

A guest entering a pub or bar will see your draught offer long before the fridge. We used eye tracking technology[41] to see where people look when they enter a pub and order and this showed that, on average, it takes customers 12 seconds to get to the bar and notice the taps. By 23 seconds they have contacted the bar staff and ordered a drink, but it isn't until after that point, around 26 seconds, when they clock the fridge.

Your draught will also be your biggest driver of sales. Overall, draught makes up 77% of cider volume sales[42], which equates to £1.4bn to the on-trade as a whole[43], making it, on average, worth £21,500 a year to an operator[44]. Furthermore, over the last two years, we have seen draught cider grow 6% in value, in stark comparison to total on-trade drinks sales, which were flat over the same time period[45].

This is generally being driven by premiumisation in the category for both Apple and Flavoured variants, which has tapped into the consumer's desire to trade up, as part of the shift to 'drinking less but better' that is affecting all categories.

41. Walnut / HUK Eye-Tracking Research
42. CGA OPMS GB Volume Sales MAT TY to P13 28.12.24
43. CGA OPMS GB Value Sales MAT TY to P13 28.12.24
44. CGA OPMS GB Value Rate of Sale MAT TY to P13 28.12.24
45. CGA OPMS GB Value Sales MAT TY vs 2YA to P13 28.12.24

PRINCIPLES OF RANGING

1

Efficiency

How many taps are needed to fulfil volume and be effective for teams

2

Range

Think of trade-up options and the needs of the many, not the few

3

Pricing

Stretch the ladder by creating price differentials on the bar

4

Don't forget the Fridge

Consider what category roles can the fridge cover and support

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APPLE ON TAP

Customers are most engaged with Apple Cider in draught format – it is the popular choice with 55% of cider drinkers[46] and there is an Apple Cider suitable for every venue, no matter your location or offer.

Comprising brands such as Inch's and Thatcher's Gold, Mainstream apple is seeing great growth and now accounts for a third of draught cider sales (32%)[47]. It provides the perfect bridge between Classic Apple, eg brands such as Strongbow (26%), and Premium Apple (16%)[48] and so is a natural sub-category to stock for many venues.

Premium Apple (brands including Aspall and Orchard Thieves) is sold in a quarter of on-trade outlets[49] and is a great option if your venue is more premium. It performs strongly when ranged correctly and is a great profit driver, as consumers have shown themselves willing to pay extra for a quality product and experience.

Our eye-tracking research shows that standalone founts can catch the eye, but they don't tend to do so before the customer has scanned the T-bar, so we advise that standalones are placed near to T-bars for the biggest impact.

46. CGA Brandtrack August 2024
47. CGA OPMS GB Value Share MAT TY to P13 28.12.24
48. CGA OPMS GB Value Share MAT TY to P13 28.12.24
49. CGA OPMS GB Average Distribution MAT TY to P13 28.12.24

FIND YOUR FLAVOUR

Apple remains the largest sector and so, if you only have space for one cider tap, should be used for this. However, if there is space for more – and you have the customer base suited to it – then venues should consider a Flavoured Cider fount, as well as the options in the fridge.

Flavoured cider on draught is still in its infancy compared to some other categories but is still extremely valuable and worth almost a quarter of draught cider sales[50]. Operators also see good returns on it, as it is worth £8,700 a year to an operator[51].

When Flavoured is added on draught overall wet sales across all categories are likely to increase – thus proving a real boost to business. Our research saw an average of 3,826 serves per month, up 572 against the previous year. Similarly, if Flavoured is removed from the bar it has a negative impact on overall wet sales[52].

Consider adding either a Mainstream Flavoured (of the likes of Strongbow Dark Fruit and Magners Dark Fruit) or Premium Flavoured (Old Mout, Kopparberg) option, depending on your venue style, will add interest and intrigue to your range.

This equates to **62 BOTTLES** more per week

[53]

	Draught Flavoured Cider	Packaged Flavoured Cider
Volume Rate of Sale After Installation	**56** Pts/wk	**48** Bts/wk
Volume Rate of Sale Before Installation	N/A	**50** Bts/wk
Share of Draught/ Packaged Beer & Cider	**4.1%** N/A	**44.5%** -3.7pp vs YA

50. CGA OPMS GB Value Share MAT TY to P13 28.12.24
51. CGA OPMS GB Value Rate of Sale MAT TY to P13 28.12.24
52. CGA Volume Pool Data to June 2024
53. CGA Volume Pool Data to June 2024

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THE POWER OF PACKAGED

Offering packaged cider alongside draught is a no-brainer because it gives customers what they want and allows venues to expand their range, thus offering drinkers more choice.

Realistically, the majority of venues will only have room for one draught tap for Apple and in some venues a second for a Flavoured or Premium option.

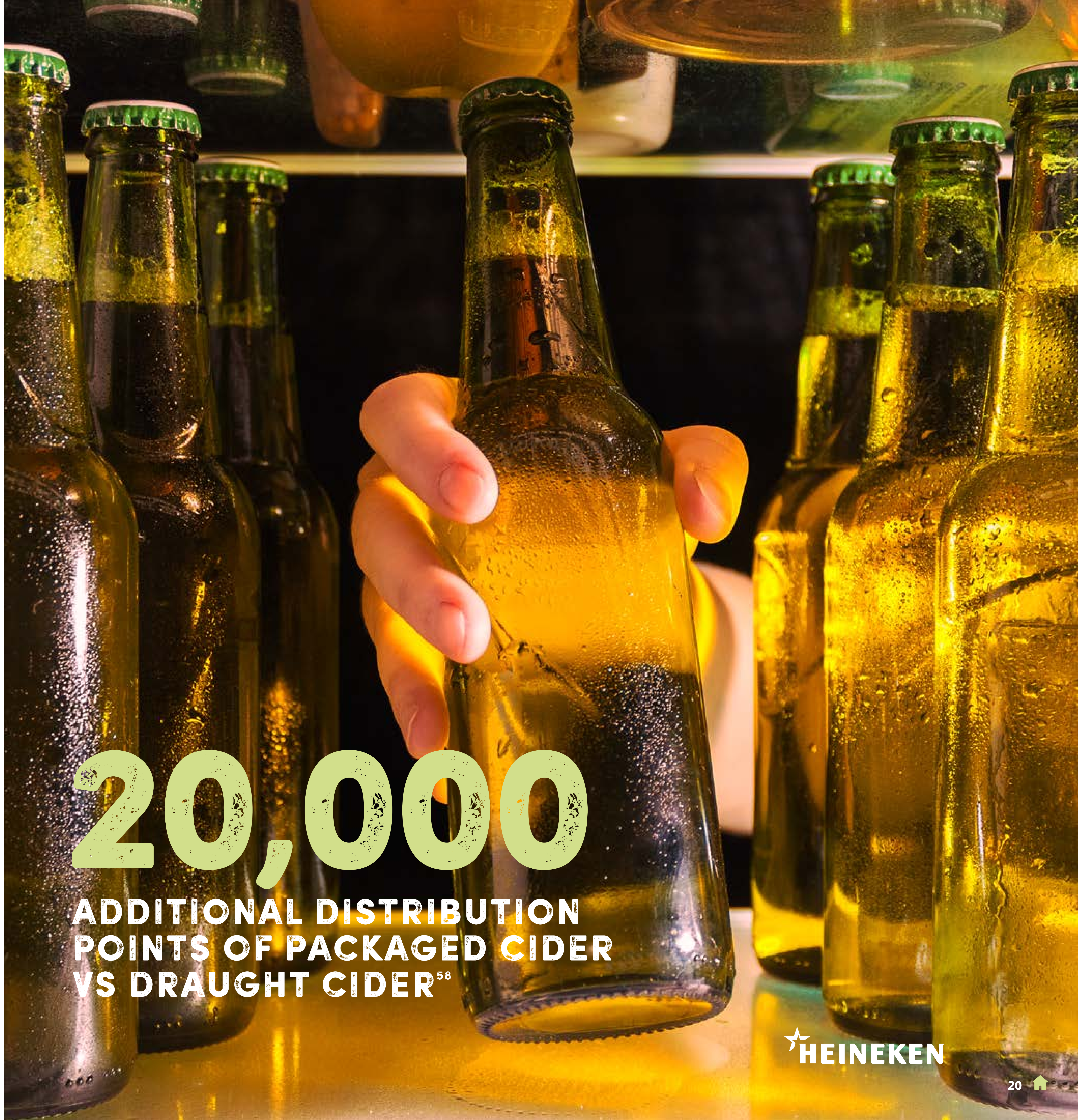
The fridge therefore allows for a greater range of flavours and varieties. Showcasing this effectively is vital, as guests often won't even notice the fridge until after they have ordered their drink.

When they do scan behind the taps and towards the fridge they will be drawn to the top shelf first, so it is imperative to ensure this is stocked with a popular and profitable range of ciders. Cider is one of the only categories that guests choose between, most other products in the fridge are bar calls.

Premium Flavoured ciders are the dominant force in the fridge, growing to 72% of cider sales[54]. No and Low is also a sector in growth, growing by 11% in the last year[55]. All indicators suggest this will continue to move in that direction so space should be found to display and satisfy that growing market.

Cider should take pride of place in the fridge over beer because 28% of cider sales are through the fridge in comparison to just 9% of beer sales[56]. Further to that, 49%[57] of customers show a preference for packaged cider, making it a must stock for operators.

The great news for the on-trade is that there is no need to be a draught venue or a packaged venue as both options support each other and work to highlight that you take cider seriously by giving it the room it deserves.



54. CGA OPMS GB Value Share MAT TY to P13 28.12.24
55. CGA OPMS GB Value Sales MAT TY vs LY to P13 28.12.24
56. CGA OPMS GB Value Share MAT TY to P13 28.12.24
57. CGA Brandtrack August 2024
58. CGA OPMS GB Average Distribution L12 Weeks to P13 28.12.24

PICKING A PACKAGED OPTION

Flavoured Ciders should lead the way in fridges.
Berry is the most popular with 79% of the market share[59].

However, consumers are open to trying more flavours with tropical, citrus and other familiar fruits being welcomed. Flavoured Cider brands in growth include Old Mout Berries & Cherries (posting the biggest growth over the last 12-months, up £8.2m in value), Old Mout Pineapple & Raspberry (up £5.8m in the last 12-months), and Kopparberg Mixed Fruits (up £2.4m over the same period)[60].

THE VALUE OF FLAVOUR[61]

GB MAT		Value	Volume (HL)
BERRY	79%	£333M	343,940
EXOTIC	21%	£91M	89,722
		£424M	443,663

THE "AVERAGE" PURCHASE JOURNEY FOR A BEER/CIDER BUYER

While each journey is very dependent on the layout of the bar, the business of the pub and the buyer's mood and preferences, there are some common themes that emerge.

0.0 secs
The guest enters the pub

11.6 secs
Guest arrives at the bar and sees the taps

19.6 secs
Guest spots bar staff

22.2 secs
The guest orders their drink

25.7 secs
Guest looks at the fridge selection

26.8 secs
Guest sees posters, leaflets and other PoS

45.5 secs
Guest notices the glassware, once they've been served

59.4 secs
Guest finds a seat

Time to first contact: The lower the numbers, the earlier the different elements are looked at on average. I Stats areonly for the first purchase journey, from entry to bar to sitting at the table.

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59. CGA OPMS GB Value and Volume Sales MAT TY to P13 28.12.24
60. CGA OPMS GB Value Sales MAT TY vs LY to P13 28.12.24
61. CGA OPMS GB Value and Volume Sales MAT TY to P13 28.12.24

THE RIGHT BRANDS FOR YOUR BUSINESS

When customers approach the bar, they generally know the type of drink they are going to order but at least half (50%)[62] have yet to decide on the brand.

This will be decided by visibility and the occasion for which they are there.

So, if customers know what type of alcohol they want, it is up to operators to decide what makes most sense in their venues and hits the spot for their guests. Here's a guide to what role each sort of Cider plays in venues and how they interact with each other.

See next page >

62. Heineken Path to Purchase Reserach

DRAUGHT APPLE[63]

Apple Cider falls into three sub-categories: Classic, Mainstream and Premium. Depending on your outlet type there is an Apple Cider to best suit your offering

CLASSIC APPLE

Share of the draught Cider market:	26%
Percentage of on-trade outlets that stock it:	39%
Value delivered per pub, per year:	£10,200
Average price per pint:	£3.83

Strongbow dominates this section as it is the most recognised cider in the country, while other big brands in this category, include ciders like **Stowford Press** and **Somersby**. Consumers interested in this section of the market are looking for an accessibly priced, sessionable Cider and these brands work well in most community pubs and the social club sector.

MAINSTREAM APPLE

Share of the draught Cider market:	32%
Percentage of on-trade outlets that stock it:	24%
Value delivered per pub, per year:	£20,300
Average price per pint:	£4.27

This category bridges the gap between Classic and Premium Apple and is showing strong growth. Brands include the likes of **Inch's** and **Thatchers Gold** and are a good fit for all outlet-types and deliver a lot of value to venues where they are stocked.

PREMIUM APPLE

Share of the draught Cider market:	18%
Percentage of on-trade outlets that stock it:	28%
Value delivered per pub, per year:	£9,800
Average price per pint:	£4.81

Premium includes brands such as **Aspall**, **Orchard Thieves**, **Inch's Riversider** and **Cornish Orchard**. Consumers looking for these brands are seeking a quality drink and experience that is worth the extra cost and consequently, brands in this segment tend to work better in higher end bars and restaurants, particularly those with a food or craft-focus.

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63. CGA OPMS GB Value Share, Average Distribution, Value Rate of Sale, Average Pint Price MAT TY to P13 28.12.24

DRAUGHT FLAVOURED[64]

When it comes to Flavoured Cider, consumers generally see the category as divided into Mainstream Flavoured brands and Premium Flavoured brands.

MAINSTREAM FLAVOURED

Share of the draught Cider market: **15%**

Percentage of on-trade outlets that stock it: **32%**

Value delivered per pub, per year: **£6,900**

Average price per pint: **£4.00**

The former, comprises brands such as **Strongbow Dark Fruit**, **Magners Dark Fruit** and **Carling Black Fruits** and should be stocked in more mainstream outlets as a compliment to Classic or Mainstream Apple, where sales can justify it. Fans of this category tend to be at the younger end of the market.

PREMIUM FLAVOURED

Share of the draught Cider market: **8%**

Percentage of on-trade outlets that stock it: **13%**

Value delivered per pub, per year: **£9,700**

Average price per pint: **£4.41**

This category is still very much in its infancy but is showing huge potential, performing just as well for operators of high street pubs to craft-led venues and everything in between. Offering a more premium option for Flavoured Cider drinkers in higher end outlets works particularly well and is proved to boost sales. Brands here include the likes of **Old Mout**, **Kopparberg** and **Rekorderlig**.

PREMIUM FLAVOURED PACKAGED

Share of the packaged Cider market: **72%**

Percentage of on-trade outlets that stock it: **74%**

Value delivered per pub, per year: **£5,600**

Average price per 500ml bottle: **£4.95**

Our insights show that, on average, consumers are much more engaged with fruit ciders in their packed format, despite the growth we are seeing in Flavoured Cider on draught. A further opportunity for this section of the category, therefore, is to look at offering more Premium Flavoured Ciders in the fridge, to encourage trade up.

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64. CGA OPMS GB Value Share, Average Distribution, Value Rate of Sale, Average Pint Price MAT TY to P13 28.12.24

THE CIDER RANGE PRINCIPLES

Taking into account all the above, then, an Apple Cider on the bar, even if it's just a single tap, is therefore a given for every draught venue. Many outlets, however, have more than one tap, in which case a Fruit Cider should be added on draught as a second option.

Our insight shows that, in venues where Flavoured Cider tap is added to the bar, wet sales increase by 572 serves per month on average. Moreover, when it is removed from draught, not only are sales of Flavoured Cider affected, all other Beer and Cider categories are also impacted.[65]

In the fridge, it is almost the opposite story, with Flavoured Cider brands dominating sales here. However, there are Apple Cider brands that work well in the fridge, including Bulmers and Magners, which have built huge brand equity over the years. These should be stocked in addition to Flavoured Cider brands in order to maximise sales.

What is clear, is that to maximise sales, Flavoured Cider should be available both on draught and in the fridge. Rather than cannibalising sales from each other, in fact overall sales grow in this scenario to the equivalent of an extra 62 bottles a week.[66]

65. CGA by NIQ Volume Pool Data to June 2024
66. CGA by NIQ Volume Pool Data to July 2022. Stocking Scenarios QTR TY vs YA

DRIVERS OF CHOICE

CIDER IN WET-LED PUBS[67]

Cider drinkers in wet-led pubs aren't looking to spend as little as possible.

In fact, according to our research, for customers in these outlets the top three factors when choosing to drink cider are: value for money, favourite brands, and the quality of the product. It isn't, therefore, just about cheap drinks. A compelling offer will be made up of brands that are familiar, are considered to be high quality, and therefore, are seen as offering great value for money.

CIDER IN FOOD-LED PUBS[68]

The top drivers of choice for cider drinkers in food-led pubs are also value for money, favourite brands, and the quality of the product.

However, they prioritise visibility of brands on the bar and in fridges more than the national average. Operators of these types of venues should therefore ensure that they are promoting their cider offer by displaying brands prominently and using PoS and other marketing materials.

CIDER IN RESTAURANTS[69]

Value for money is still a priority for restaurant-goers when it comes to choosing a cider, along with their favourite brands and the quality of the drink.

However, compared to the national average, diners also list friend recommendations among their top factors. Restaurateurs should therefore emphasise high-value, leading cider brands to drive more sales.

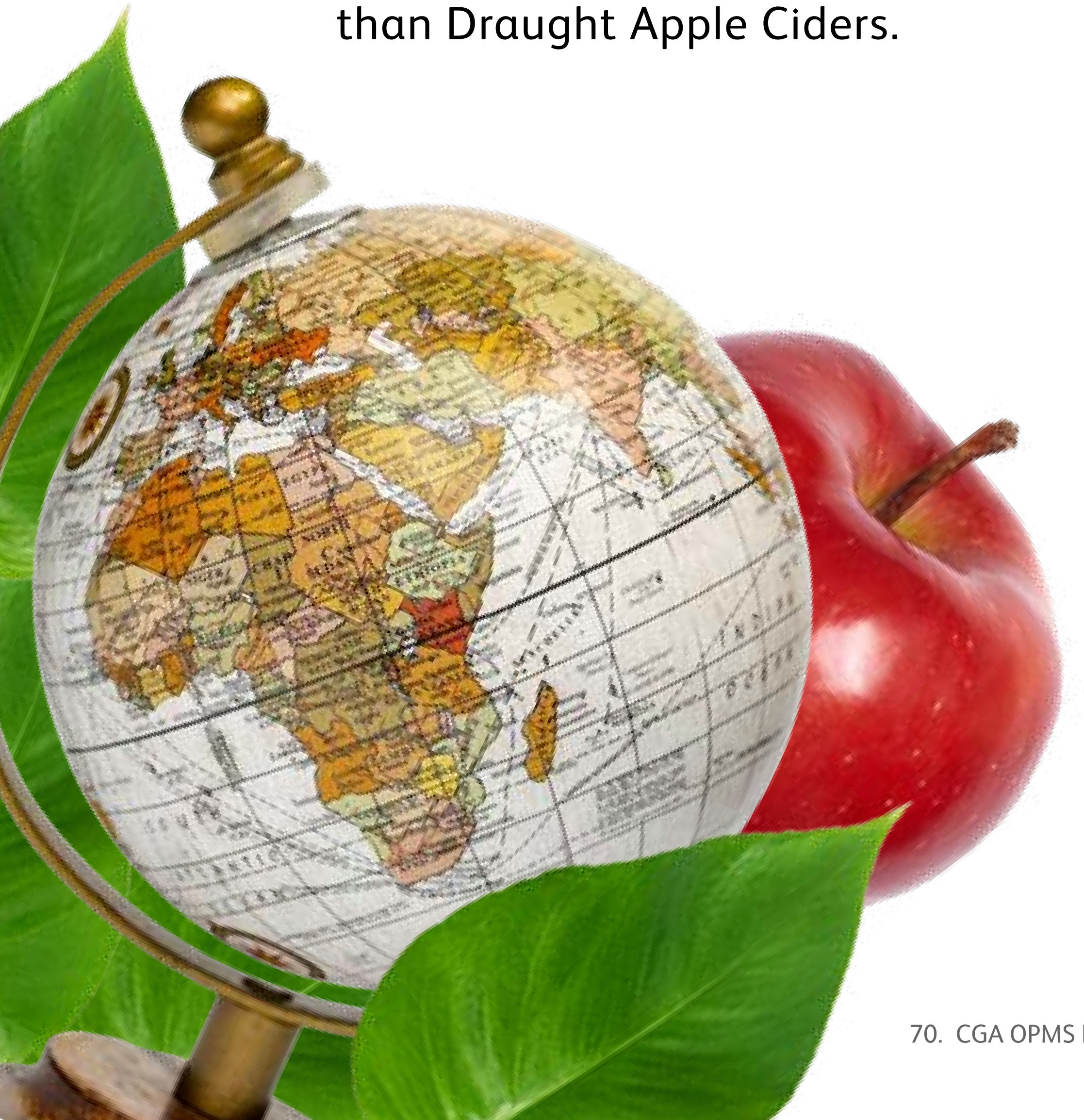
67. CGA Brandtrack June 2024
68. CGA Brandtrack June 2024
69. CGA Brandtrack June 2024

REGIONAL PREFERENCES

It's important to note that, due to its long and proud British heritage, Cider has more regional differences than most other drinks categories and this is something operators might want to keep in mind when choosing which brands to stock – does your range reflect the regional and national preferences that are at play in your region(s)?

Certainly, some Cider brands are popular throughout the country, but others perform better in pockets. Strongbow is a solid performer across the country, for example, but has even greater appeal in Wales, the North East and Scotland. Aspall's heritage, as a Suffolk produced Cider, sees it perform better in the East and in London compared to other parts of the country. Whereas Thatcher's performance in its South West heartland is vastly superior to anywhere else[70].

Market-leading Flavoured Ciders like Old Mout, Rekorderlig and Kopparberg generally perform with less regional bias than Draught Apple Ciders.



70. CGA OPMS Regional Value Sales MAT TY to P13 28.12.24

LARGEST DRAUGHT BRANDS BY REGION[71]

ANNUAL VALUE SALES (£M)

SCOTLAND	
Strongbow Original	£22.7M
Strongbow Dark Fruit	£14.1M
Aspall Cyder	£10.7M

NORTH EAST	
Strongbow Original	£23.2M
Strongbow Dark Fruit	£13.8M
Inch's	£9.7M

LANCASHIRE	
Strongbow Dark Fruit	£26.3M
Strongbow Original	£18.6M
Inch's	£16.5M

YORKSHIRE	
Inch's	£29.0M
Strongbow Original	£21.3M
Strongbow Dark Fruit	£20.6M

WALES	
Strongbow Original	£22.7M
Thatcher's Gold	£8.6M
Thatcher's Haze	£8.5M

CENTRAL	
Inch's	£36.9M
Strongbow Original	£34.7M
Thatcher's Gold	£25.2M

EAST	
Aspall Cyder	£15.6M
Strongbow Original	£13.5M
Inch's	£10.8M

LONDON	
Inch's	£39.2M
Aspall Cyder	£38.7M
Strongbow Original	£36.8M

SOUTH & SOUTH EAST	
Inch's	£34.0M
Strongbow Original	£25.7M
Thatcher's Gold	£18.9M

SOUTH WEST	
Thatcher's Gold	£111.2M
Thatcher's Haze	£29.6M
Old Mout Berries & Cherries	£16.8M

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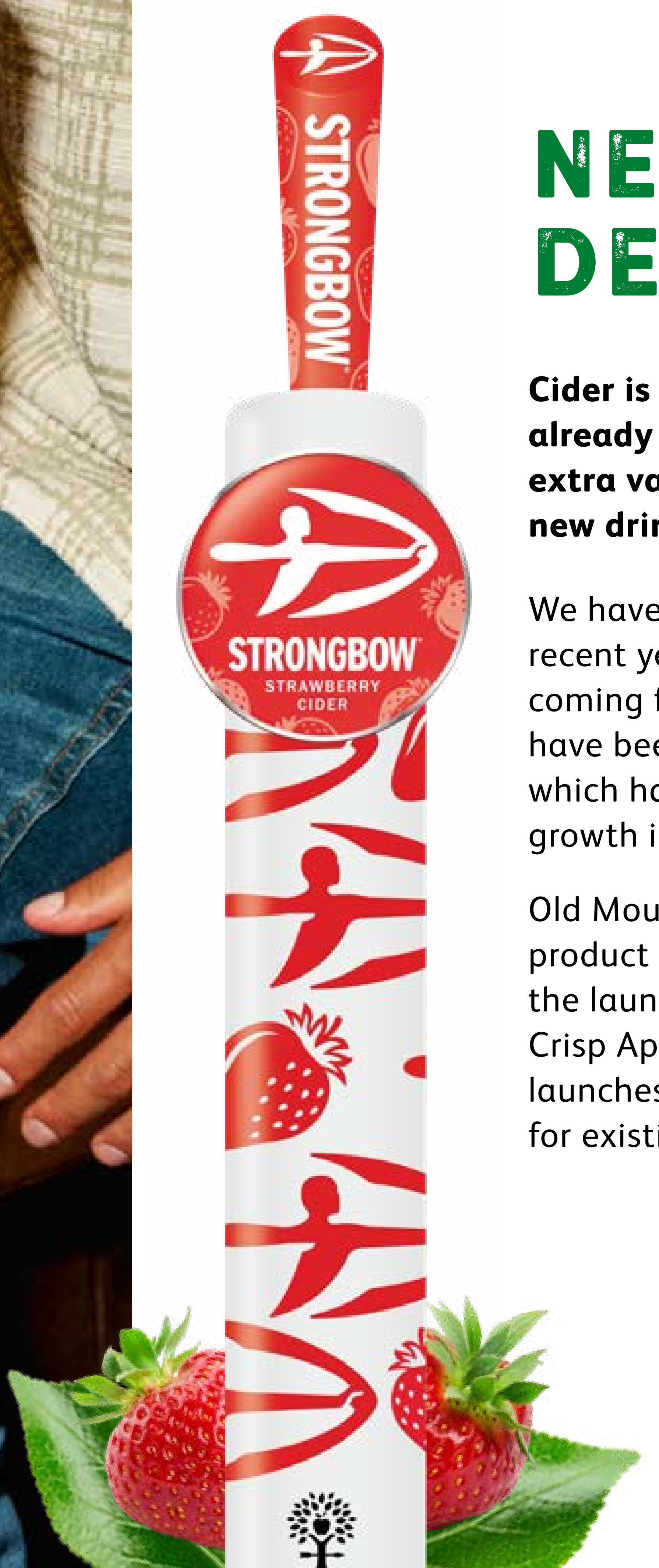
71. CGA OPMS Regional Value Sales MAT TY to P13 28.12.24

SELL MORE CIDER

Cider should be a staple at every pub, bar, and club in the country – but not just as a box ticking exercise. It can deliver incremental sales to the business by offering Cider drinkers what they want and by tempting new drinkers to the category with interesting brands, flavour combinations, serves, and enticing innovation.



NEW PRODUCT DEVELOPMENT

Cider is built on heritage and brands that are already familiar, so new options help provide extra variety or trade-up options, or to attract new drinkers to the sector.

We have seen lower levels of launches in Cider in recent years with less than 4%[72] of category volume coming from new products since 2020. However, there have been significant success stories such as Inch's, which has seen a 45% growth in volume and 54% growth in value over the last 12 months[73].

Old Mout also continues to grow, helped by new product development, which continues into 2025 with the launch of Mango and Passionfruit. Kopparberg's Crisp Apple and Thatcher's Juicy Apple are also new launches that aim to offer something new and exciting for existing fans and tempt in new drinkers.

72. CGA OPMS Full Year until 2023
73. CGA OPMS GB Value and Volume Sales MAT TY vs LY to P13 28.12.24

CIDER BE SEEN

CUSTOMERS CAN'T ORDER BRANDS AND VARIANTS THEY DON'T KNOW YOU STOCK AND SO MAKING SURE THERE IS VISIBILITY OF CIDER BRANDS – NEW AND OLD – IS VITAL.

Our eye-tracking insight shows the best place for brands to be seen is the top of the fridge but there are further ways to ensure you are shining the best light on your Cider offer:

ILLUMINATION

Make sure fridge lights are working and on to highlight your range.

DRINKS MENUS

Tell them what you have along with key components such as taste profile and ABV.

SCREEN TIME

Make use of electronic boards or tvs in your venue. If there's nothing on the tv use that space to promote your cider range and potentially any offers you run.

STAFF TRAINING

Your team is your biggest asset so ensure they know what ciders are on and can confidently praise their virtues to your customers.

POINT OF SALE

Bar runners, beer mats (or Cider ones in this case), table talkers and the like all nudge customers towards their next choice of drink.

DO IT DIGITALLY

Most new customers will find you online first so whatever you are communicating in venue should be replicated on-line.

BRANDED GLASSWARE

Give them the right drink in the right glass with the perfect serve to ensure they get an experience they will want to repeat (people only ever buy a second pint based on the quality of the first).

Above and beyond this, think about using cider as a lead drink for events such as live music, to offer a point of difference to local competitors, and/or swap out the annual beer festival for a cider one.

New and interesting serves can also deliver an elevated experience for consumers – and provide better margins. No and Low Alcohol Ciders should also be given space, as they tap into the moderation trend as well as differing occasions and dayparts for cider, family meals and lunchtime, for example.

Our research shows that consumers are particularly open to new drinking experiences, and more than half (51%)[74] of drinkers interested in Cider-based cocktails. This rises to 66% among 18 to 34-year-olds, so operators serving a younger demographic should certainly consider the idea as a way to increase sales and margins. After all, cocktails can be sold at a premium and generate 'I want what they are having' sales surges, particularly if presented in an eye-catching glass or with a creative garnish (see box for inspiration).

Above all, operators should remember that customers only ever order a second pint of anything if the first was a good experience which Cider can look to improve on as 73% said they were satisfied with the overall quality of their cider serves which is less than all other categories[75]. Therefore, perfect serve is the order of the day: cider poured correctly, served at the right temperature, and in the right glass.

HONEY & APPLE CIDER SOUR

INGREDIENTS

- **100ml** Inch's Apple Cider
- **25ml** Jack Daniel's Tennessee Honey
- **10ml** Honey
- **10ml** Lemon Juice

METHOD

1. Add a little ice to an Inch's half pint glass or tumbler
2. Pour in the Inch's Cider
3. Add the Jack Daniel's Tennessee Honey whiskey, lemon juice and honey
4. Gently stir with a mixing spoon (or a normal spoon will do)
5. Garnish with a lemon wedge or twist of zest

74. Toluna Survey April 2023
75. CGA by NIQ Consumer Pulse, January 2025. Sample: 377

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A DRINK FOR ALL SEASONS

The Cider category is constantly evolving as consumer tastes and behaviours change. Frequency of visits to the on-trade and the amount customers drink has shifted through the generations, for example. We are also now starting to see a change in the seasonal bias towards Cider.

WINTER WARMER

Cider has a special place in the hearts of customers during the warmer seasons. We see a large increase in consumption on key occasions such as Bank Holidays and summer festivals.

The May Day Bank Holiday is a key indicator of moving into ‘Cider season’ with a 50% uplift in sales[76] for the category, similar to the spike seen over the August Bank Holiday. Of course, weather in this country remains unpredictable, and when heatwaves arrive it leads to a spontaneous uplift in Cider sales that is less predictable but it shows the value of ensuring stock levels are high throughout the warmer months.

Two-thirds of Cider drinkers consume it in the summer, however 63% of those indicated that seasonal flavours would encourage them to drink more Cider in the autumn and winter[77] and so it is worth thinking about stocking flavours that speak to this, as well as a mulled Cider during the winter months.

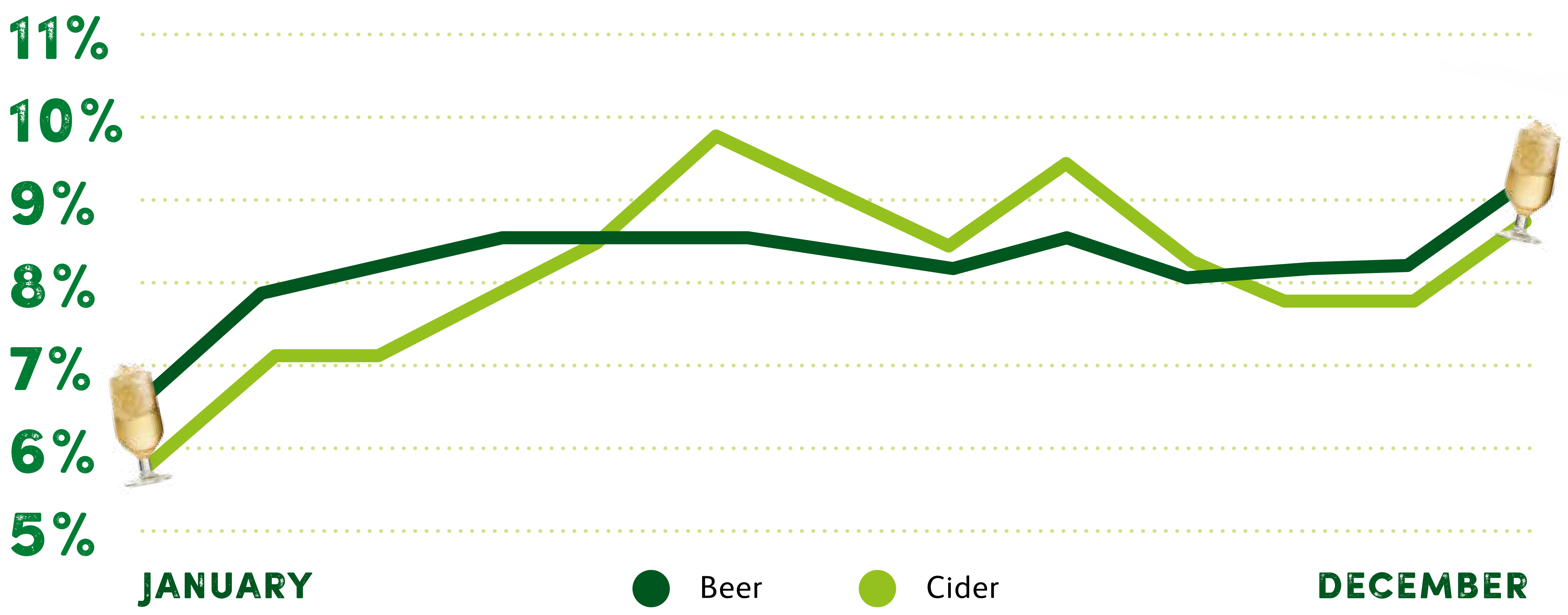
76. CGA Managed EPOS Daily Data to September 2023
77. Toluna Survey April 2023

WHEN IS CIDER SOLD?

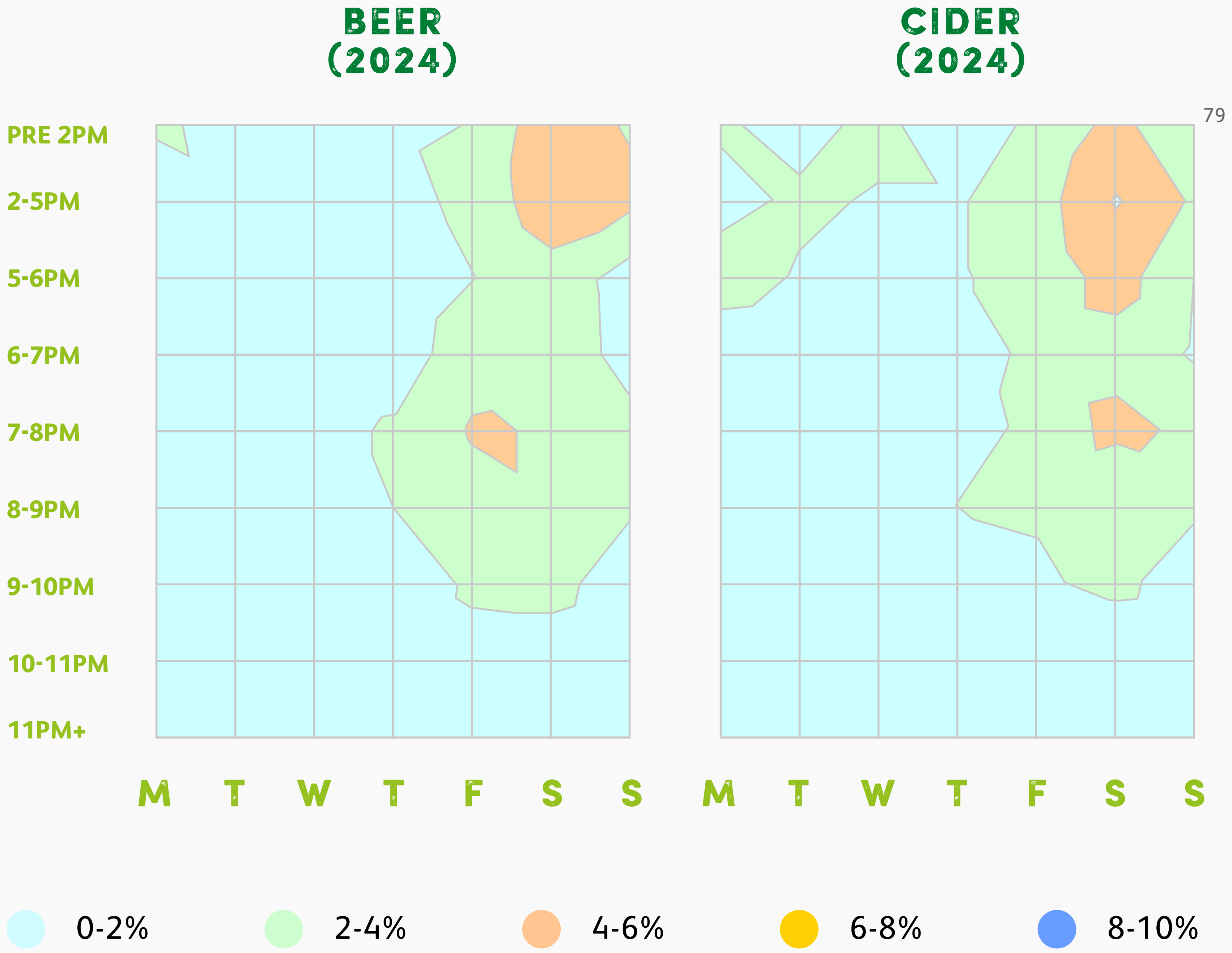
The graph below shows how Cider sales perform across the year, compared to beer.

Mainly, the two track similarly but there is a greater peak across the middle warmer months for Cider. In comparison, beer sales do remain more consistent, spiking only as we reach the Christmas period, as all drinks sales rise.

SALES TREND BY MONTH[78]



AVERAGE SHARE OF SERVES ACROSS A WEEK IN THE ON-TRADE



The weekly heat maps for 2024 show that both Beer and Cider are most popular at the weekends. However, Cider has a greater spread of sales throughout the week, which indicates the loyalty Cider drinkers have to the category and how it can be a drink for all occasions.

If we delve a little deeper into these patterns, we see that across the quarters of the year afternoon consumption picks up in the spring and autumn, as guests look to make the most of the beginning and end of the pub garden season. Promoting Cider on tables and other marketing assets outdoors will therefore help boost sales during these periods.

*Based on data from Q3 2024

78. CGA OPMS GB Value Sales Rolling 4 Week vs LY to P13 28.12.24
79. Kantar Alcovision I Total Cider I On Trade I Serves % I 3m/e 30 Sep 2024

DATES FOR THE DIARY IN 2025

Based on our insight we can say that Cider sales can be expected to spike on the following days in 2025, so make sure you are ready and prepared to maximise the opportunities.

APRIL 20 – EASTER SUNDAY

A long weekend and, all being well, some warmer weather on the way will give pubs and bars the opportunity to capitalise.

MAY 5 & 26 – MAY BANK HOLIDAYS

May brings both long weekends and major sporting finals such as the UEFA Champions League and rugby union's Champions Cup. All key trading opportunities. Early Bank Holidays can result in a 50% uplift in Cider sales.[80]

JUNE 3 – WORLD CIDER DAY

A global day that gives you the opportunity to celebrate all that's great about Cider. This year it falls on a Tuesday., helping to drive footfall earlier in the week.

JULY 2 – 27 – UEFA WOMEN'S EUROS

The Lionesses drew big audiences on the way to winning the Euros. Major summer events on terrestrial TV can be great crowd-pullers for all kinds of venues.

AUGUST 25 – AUGUST BANK HOLIDAY

The Bank Holiday may be on the Monday but venues should be prepared for increased sales from the Friday onwards.

OCTOBER 31 – HALLOWEEN

A Friday night Halloween will be a huge chance to match apple bobbing and other activities with the perfect accompaniment.

NOVEMBER 5 – BONFIRE NIGHT

This falls on a Wednesday so could create a midweek opportunity for incremental sales. Mulled Cider could feature as part of your seasonal offer.

DECEMBER 19 – MAD FRIDAY

The entire run up to Christmas should peak on the last working Friday before the big day. However, midweek may be even busier with Friday now a day more used to work from home.

80. CGA Managed EPOS Daily Data to September 2023

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For more insight and resources to help you run your business more profitably please click here

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