WESTONS CIDER REPORT 2026

HEREFORDSHIRE
WESTONS
CIDER MAKERS
1880









HEREFORDSHIRE WESTONS CIDER MAKERS 1880

WELCOME

TO THE

11TH EDITION OF THE CIDER REPORT

Welcome to the 11th edition of the Cider Report, our annual overview of the cider category — reflecting on the past year and looking ahead to the opportunities and challenges before us.

The cider industry has faced significant challenges in recent years and, as we publish this year's report, the economic outlook suggests that the year ahead may prove equally demanding. Cider makers and manufacturers continue to experience sustained pressure from rising costs across raw materials and packaging, alongside an evolving regulatory and policy environment. At the same time, consumers are navigating broader cost-of-living concerns that may influence purchasing decisions and drinking habits.

Despite these headwinds, the cider category remains a dynamic and resilient marketplace. It continues to be a vibrant segment within the drinks industry, driven by ongoing innovation and the introduction of new products and brands that respond to evolving consumer tastes.
In what is set to be another challenging year, it is essential for the long-term health of the category that cider makers remain focused on recruiting and engaging new drinkers, while also retaining loyal consumers.

In this report, we outline the key trends shaping the category and share our perspective on the opportunities ahead. We hope it provides valuable insight for everyone involved in the industry and supports informed planning for sustainable growth in the year to come.

Thanks for reading,

HELEN THOMAS

MANAGING DIRECTOR OF WESTONS CIDER & 4TH GENERATION WESTON FAMILY MEMBER

colours for each section tbc

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In 2025 the value of the total cider category in the UK has seen a year-on-year increase of 2.2%.
This increase in spend has been driven by increased prices.

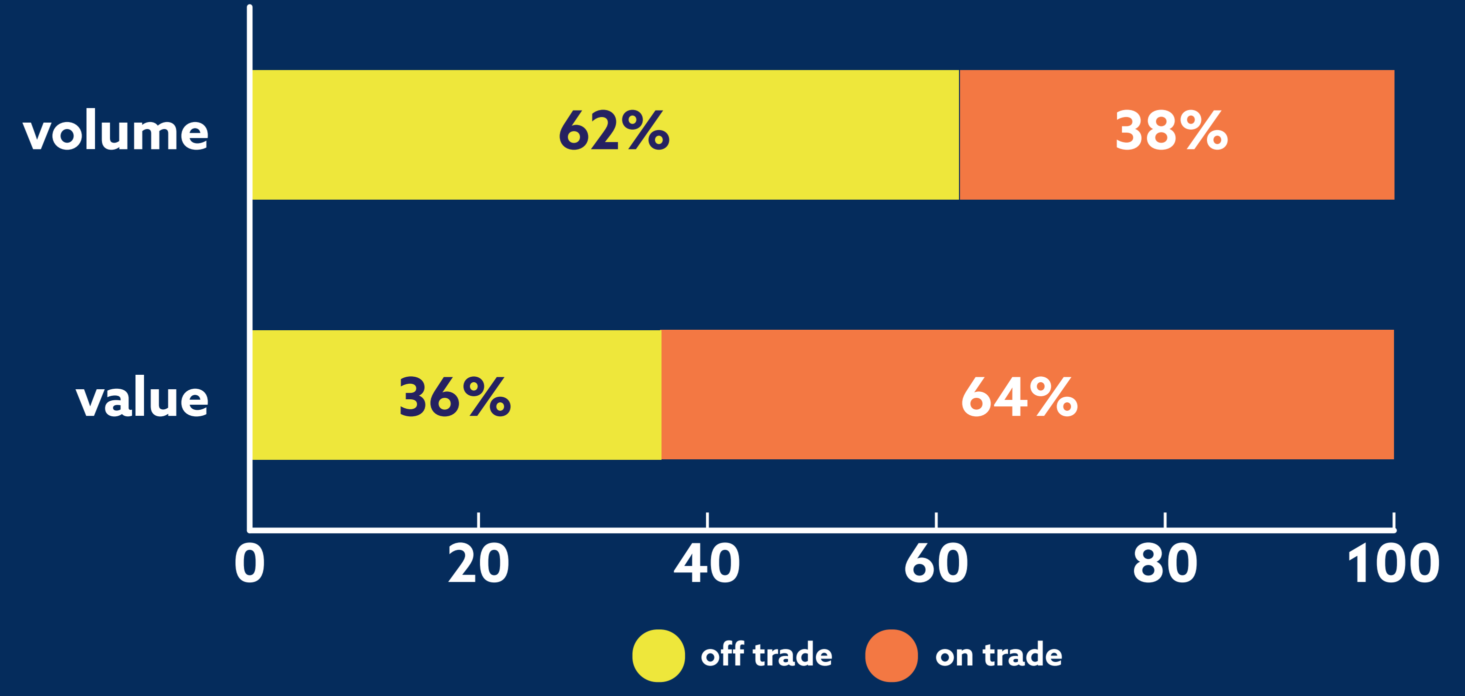
IN 2025 THE VALUE OF THE TOTAL CIDER CATEGORY IN THE UK IS £3.17 BILLION

THE ON TRADE PENCE PER LITRE HAS INCREASED BY 7.3%

THE OFF TRADE PENCE PER LITRE HAS INCREASED BY 2.3%

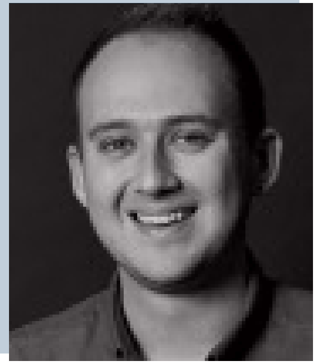
Over 643 million litres of cider were bought in the UK, a decrease in volume of 2.6% when compared to the previous year. We are seeing this same trend of falling volume across multiple other alcoholic drinks categories.

CIDER INDUSTRY HEADLINES



The volume split by channel has changed only slightly since last year with **62%** of volume coming from the off trade **(63% LY)**. **38%** of volume comes from the on trade.

The value split has stayed exactly the same as last year with **64%** of spend coming from the on trade channel. The on trade pence per litre at **£8.44** is significantly higher than the off trade at **£2.82**, making it a significant generator of value.



Jourdan Gabbini

Beer & cider buyer

Waitrose

Across the drinks industry, are there any trends or observations that will remain and become more important than others as we enter a challenging 2026?

From a total drinks level, 2025 has been a some-what challenging year with legislative cost increases related to PRN, EPR and Duty, however, there are some green shoots where we are seeing a continued trend in some areas of premiumisation with some customers taking the approach of 'less but better'. This can be seen in cider in particular as the category has seen resilience with the continued growth of premium apple ciders, especially those in bottle, which has meant parts of the category have seen overall unit volume growth despite previous years of decline.

Waitrose customers are looking for more premium cider offerings in our shops, with sales up 93% for Bottled Premium Cider last year, which has led us to add more of these drinks such as Showerings and Hawkstone to our range which have quickly become customer favourites, over the last few months.

What should be the focus for the cider category in 2026 and beyond?

-Are there any new opportunities for cider within 2026?

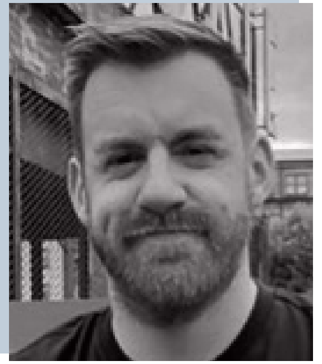
In my opinion, the focus for the cider category for 2026 and beyond remains focussing on driving premium apple cider and aiming to unlock new drinking occasions, whether this be capitalising on key seasonal events and drinking occasions such as sport, (most notably in 2026, the FIFA World Cup) Easter, Summer or Christmas or driving penetration through cross shop, such as through food pairings or demonstrating the versatility of cider not just as a standalone refreshing beverage, but also an ingredient in a recipe or alcoholic cocktail. We are also seeing more and more of our customers experiment with food and drink combinations which leads cider a strong opportunity to maximise on this trend. With more premium and single vintage options now in the market, we will also see more of an ability to cater to this with bespoke tasting notes and pairings.

Whilst higher ABV and premium liquids have continued to grow in 2025, moving into 2026 Low and No will continue to remain a focus, with more and more innovation being released throughout the year as the category carries on performing well at a total level. One of the best ways to drive trials for this innovation tends to be sampling and getting liquid on lips, but also activation aligned to the master brand so that the new liquid is accessible.

Anything else that you'd like to share:

Something else I will be working on in more detail moving into 2026 outside of the macro trends, will be applying a continued focus on local and regional ranges to ensure the right products are in the right spaces as regionality in the cider category remains important to customers, whilst ensuring I have the right formats and ensuring cider shows up in all relevant shopping occasions as an option.

THE CIDER EXPERTS



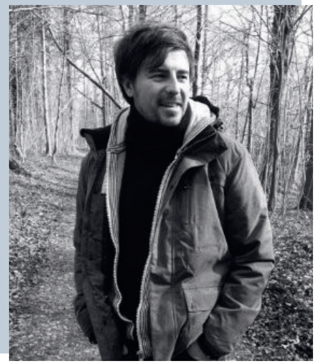
Paul Bolton

Drinks Category Manager

Greene King Pub Partners

Cider has come a long way in the last decade in the on-trade, with more varied options than ever across draught, packaged, apple and fruit, with the tastes of a wider number of consumers now being met by the category. Whilst a constant flow of NPD has helped to keep consumers interested and sales buoyant, continuing premiumisation has to be the key focus for growth for us.

Although the trade has been talking about this for what feels like decades in other categories, Cider seems to have taken much longer to catch up, which does make sense given the relative lack of taps to play around with vs beer. But I keep coming back to the very simple premise of if a pub has a premium beer range, why shouldn't it have a premium Cider offering? We still see so many pubs that don't have a suitable range for the drinkers who are coming in when they could be stocking better brands, that they could charge slightly more for and would generate a better margin. Understanding this is a key part of maximising sales and also driving footfall during the warmer months - especially given what we know about the influence the Cider drinker has on where the group goes!



Ashley Moore

Category Lead Beer & Cider

Mitchells & Butlers

I've worked right across the drinks industry, working in category, sales and marketing roles spanning wine, beer, spirits, soft drinks and cider. This experience has given me a strong commercial understanding of how categories grow, how brands win and how to create strategies that deliver value for both customers and consumers.

Cider can authentically play into all the key trends whilst offering a premium experience at a 'good value' or lower price/entry point than other categories. Embrace health and moderation trends, leveraging cider's natural, fruit forward, and lower ABV profiles. Drive premiumisation through craft credentials, authenticity, and flavour innovation. Strengthen sustainability messaging and utilise imperfect or locally sourced fruit where possible.

The category has not travelled as far on the premium journey as beer or spirits, and that is actually one of its biggest strengths. It can offer a premium drinking experience without pushing into the highest price points, which removes a key barrier for guests who want something quality led but still accessible. That creates real headroom for growth and makes cider a category with more opportunity than many others right now.

Cider also has genuine potential to play a bigger role across more occasions in the on trade. It can elevate the drinking experience in a way that feels refreshing, modern and relevant. Yes, it still carries some older perceptions, but the direction of travel is firmly positive. With lighter alcohol strengths, natural flavour profiles, a naturally gluten free makeup and a clean sparkling style that avoids the heaviness of some other drinks, cider has a broad and growing appeal. It can reach younger drinkers looking for lighter choices as easily as it appeals to more traditional guests who already understand its character.

What makes this even more exciting is the depth of craft, provenance and heritage sitting within cider. These are powerful qualities that other categories have used to drive major growth, cider can tap further into this potential. There is a clear catch up opportunity here and it is a genuine advantage. The more cider leans into real orchards, real local makers and real regional stories, the more distinctive and compelling it becomes as people look for more authenticity.

Living in the southwest makes this even more obvious. Cider should be far more prominent on the bar than it currently is. With beer ranges, especially world lager, becoming increasingly similar in look and feel and sometimes lacking true provenance, cider has a chance to cut through with something more authentic and more rooted in a real place and with real craft. It can offer variety, identity and a sense of something genuine in a landscape that can sometimes feel uniform.

There is a real opportunity here. Cider can grow, it can become more visible on the bar and it can provide guests with something that feels premium without pushing them into premium price ceilings. It is perfectly placed to take advantage of the biggest trends shaping drinking culture and there is no reason it cannot take a far stronger role in the on trade than it holds today.

Steve Alton

CEO of the British Institute of Innkeeping

Chief Executive of the British Institute of Innkeeping bringing nearly 30 year's experience leading technology and insight businesses to champion and support pub licensee across the UK

Now more than ever value will be judged by experience not price. Drinkers are seeking theatre, a great story and provenance. Sustainability will continue to be important as we enter 2026 but also essential for drinks brands to be lean commercially. In terms of focus for the cider category during the coming year beyond, authenticity is valued hugely by consumers and cider can really deliver in this area through great raw ingredients and connecting to it's heritage roots.

Looking to the future new formats and taste profiles opportunities to broaden ciders' appeal, together with Low and No alcohol variants.

Ryan Truswell

Cider/Ale Stout and No Beer Buying Manager

Asda

Poacher Turned Gamekeeper! 4 years within Asda always working within the beer team, before that head brewer and brewery manager across two independent Yorkshire breweries.

Across the drinks industry, are there any trends or observations that will remain and become more important than others as we enter a challenging 2026?

Across the industry low and no is still a growing area as all total drinks industry are still working on new lines and reformulating existing lines to improve the flavour and the taste as the area has grown significantly in importance and standards over the last few years.

Flavours is something that seems to be gaining traction across the beer category as new flavoured lager at a lower abv is coming in an abundance this year. However, this does ask the question is there a new excitement in cider and or is the new lines that have been added in the last year doing a good enough job at enticing shoppers and or been clear to shoppers what the product is?

One thing that I think will be key this year is price and consistency of the offer will be key in 2026. With money getting tighter for everyone as every aspect of your life starts to become challenging, I feel shoppers are going to be looking for consistent value of their favourite products. The days of buying the product even when off deal at a higher price are numbered. The multi buy and everyday price mechanism are growing in sales week by week.

As ever a low and no offering is becoming more and more relevant. The flavours of this need to be akin to a younger shopper for any new products, while the older shoppers are wanting a close as the real thing.

What should be the focus for the cider category in 2026 and beyond?

The cider category needs to focus on landing any NPD they have with some exciting feature and display, promotion and marketing. The brand leader in cider has not led or supported NPD which has made it difficult for the rest of suppliers to get the cut through. Any NPD launched needs to be clear and simple. Flavours be clear in what flavour they are be flavours shoppers know.

Premium heritage apple is still a growth area. It offers shoppers a trade up and needs to make sure it is front and centre for shoppers in summer to make sure any light shoppers have a chance to trade up.

Offering value outside of multibuy at a lower price point. Single cans in on and off trade offers a point od differences.

Are there any new opportunities for cider within 2026?

Apple wise, there is a gap at 3.4% for a sweet flavoursome apple for the younger generation of shoppers who want moderation.

Making the most of the world cup, although this is likely to be the man marked by the big brewers considering sponsorship and it been a key selling time. With the hopeful warm weather and progression

Continuing to growth of premium ABV in fruit and apple! Whether this is single cans or multipacks it's a growing trend and those that drink regular do want bang for there buck.

Single cans of existing range to offer a lower price point outside of the multibuy bottle range. This is all currently discounts the EPR and glass costs rather than lowering the price of cider.

Zebra packs or mid packs of low and no is a huge opportunity for whichever cider supplier jumps on this bandwagon, and or in the on trade on draft

Overview comment & opinion (anything else that's relevant to your role, channel & business that you'd like to share):

While the market is tough, as is the whole industry at the moment with cost pressure and government taxes. I would say as whole cider is standing the test of time, the heritage cider shows that people want quality with a past they can learn about rather than the lower abv price and brand products, which of course do have a role.

I think it is very much down to retailers to showcase the breadth of cider they have on offer to the masses and find the next cider drinker that is coming through its doors, wether that is a sweet apple, fruity or heritage cider it is all a plus.

The move and interest to retro/well known secure brands is only going to help sales.

THE CIDER EXPERTS

Fanella Tyler

CEO

National Association of Cider Makers

I have spent over 40 years working in the cider industry, the last decade of which has been with the NACM.

Globally and in the UK, the political and economic outlook remains unsettled. Continued pressure on household budgets, alongside a changing policy environment, is creating uncertainty for both businesses and consumers. For cider makers, this means navigating a period of change while continuing to respond to shifting drinking habits and expectations.

Alcohol continues to attract Government attention, both as a source of revenue and through the development of the 10 Year Health Plan. At the same time, environmental policy will increasingly shape the way cider is produced and sold. Packaging will continue to see changes under circular economy policies, with Extended Producer Responsibility already impacting glass bottles of cider and the introduction of the Deposit Return Scheme for cans and plastic in 2027.

Together, these changes will influence packaging choices and consumer behaviour in the longer term.

Excise duty structures continue to incentivise the development of lower strength products, encouraging innovation below 3.5% ABV. Low and no alcohol ciders will continue to remain an important growth area in 2026 and remain a government health priority. As consumer interest in moderation and health continues to rise, cider is well placed to meet this demand with refreshing, flavour-led drinks that retain their character at lower strengths.

As the distinctively British drink, cider combines a long heritage with an ability to adapt to modern tastes. Alongside established styles, new and innovative ciders continue to broaden the category's appeal. Ensuring choice, quality and relevance will be key as the sector responds to regulatory change and evolving consumer priorities. While the operating environment remains challenging, cider's versatility and strong UK identity provide a solid foundation for the years ahead.

Kate Nicholls

OBE Chair

UKHospitality

Kate Nicholls OBE is Chair of UKHospitality, the powerful voice representing the broad hospitality sector.

As the cost-of-living crisis continues to impact consumers, it's clear that they are still discerning with how they spend their disposable income. We know that visits to hospitality venues remain the top priority for spend, according to survey results from NIQ, but both quality and experience are two critical factors for the drinks industry to prioritise.

If consumers are choosing to spend their hard-earned money in hospitality, as an industry we need to make sure we are tailoring our offering to fit demand and changing expectations – as our sector has always done.

It's no secret that hospitality is facing significant economic pressures, but our sector is held in special regard by the British consumer and we know they want to support their local businesses. As we continue to campaign for the Government to reduce hospitality's cost and tax burden, that support will be vital and cider is an essential part of driving footfall.

Whether that's a cold pint in the pub garden on a summer's day, or a warming mulled cider in the winter months as we head towards Christmas, cider is an incredibly versatile and valuable product for operators.

Operators and cider producers have always led the way in innovation and developing new products – like the recent emergence of low- and no-alcohol - to tap into changing consumer demand – I look forward to seeing that continue in 2026.

Nicola Knight

Head

Away From Home

Nicola specialises in providing insight on global strategic developments and sector trends in the Away From Home and food-to-go channels.

Economic headwinds, evolving habits: the trends transforming UK food & drink in 2026.

The UK economy is navigating a period of slow growth and structural challenge, yet there are also signs of stabilisation and emerging areas of opportunity for grocery retail and the away from home (AFH) sector. While pressures on households and supply chains remain real, easing inflation, shifting consumer sentiment and a growing focus on resilience provide opportunity for optimism.

Market drivers in 2026:

• **Economic backdrop:** Growth remains modest and long term productivity challenges persist, but inflation has eased considerably from its peak. Government attention on competitiveness and productivity offers potential for gradual improvement.

• **Household finances:** Higher taxes, persistent inflation and constrained real incomes continue to affect spending power. However, sentiment varies significantly, with younger consumers remaining notably more optimistic -opening doors for retailers and operators that provide strong value, convenience and compelling experiences.

• **Pressure on retailers and operators:** Rising labour, property and operating costs continue to restrict the ability to pass on price increases. At the same time, these pressures are driving greater innovation, encouraging new service models, productivity improvements and more efficient cost structures.

•**Inflation trends:** Overall inflation has stabilised at around 3.8%. Retail food inflation is expected to soften slightly in 2026, while AFH inflation remains higher due to structural cost drivers. In this environment, those with disciplined cost control, targeted value propositions and a focus on exceptional experiences will be best positioned to retain customer loyalty.

•**Upstream supply chain pressures:** High input costs, fragile margins and limited investment capacity continue to shape the farming and manufacturing landscape. These pressures underscore the importance of collaborative, future focused partnerships across the supply chain.

•**Systemic risks and resilience:** Climate change, geopolitical volatility, water scarcity, cyber threats and labour shortages continue to shape uncertainty. Building resilience - in sourcing, logistics, labour and technology - will be essential to maintain quality and availability.

In this environment, to support retailers and operators effectively, suppliers will need to focus on strengthening supply resilience, improving cost efficiency and offering clear, data driven insight into market trends and operational opportunities. Those who can provide stable availability, transparent pricing, collaborative planning and solutions that help manage labour, waste and productivity will be best placed to succeed. Above all, suppliers must act as strategic partners, helping customers navigate volatility while identifying new avenues for sustainable growth.

Trends that will shape the market in 2026.

In 2026, four major trends will shape demand in the UK food and drink market, in- and out-of-home: **Affordability, Enhanced Experiences, Simplified Sustainability, and Health as a Lifestyle Driver.**

What this means for the off-trade.

Against a backdrop of economic pressure, shifting policy, and rising expectations around wellbeing and environmental responsibility, shoppers are becoming increasingly discerning and value focused. They want quality at fair prices, convenience that fits seamlessly into daily life, and retail environments that feel engaging rather than transactional.

Retailers are encouraged to create propositions that feel meaningful and emotionally resonant, giving shoppers reasons to choose one store or brand over another. Experiences - whether through personalised offers, atmospheric in store moments, or products that elevate everyday routines - are becoming more influential in driving loyalty and encouraging trade up.

At the same time, sustainability must be made easier to understand and act upon. Shoppers expect government and industry to take the lead, offering simple, trustworthy cues rather than complexity. Health is also becoming a natural part of purchase decisions, with consumers looking for clarity, guidance and options that support long term wellbeing. Together, these shifts reflect a market where success will depend on retailers' ability to balance value, clarity, experience and trust in an increasingly expectation rich environment.

What this means for on-trade.

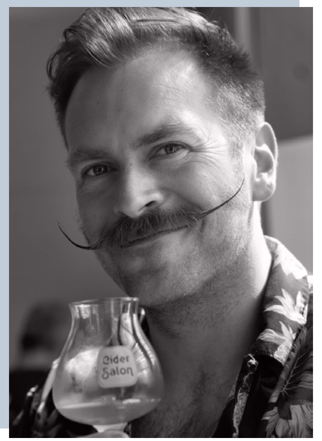
The AFH market in 2026 will be shaped by the same four cross industry trends but each plays out differently in out of home settings. Economic pressures mean consumers continue to seek value, challenging operators to offer menus and propositions that feel worth the spend while still being convenient and easy to access. This includes stronger value cues, improved range quality, more tiered pricing and the continued rollout of automated retail solutions across settings such as workplaces and travel hubs.

At the same time, the demand for memorable, social and engaging experiences is rising. Whether through enhanced service, more atmospheric environments or digital touchpoints that make the experience feel connected end to end, experience is increasingly a key differentiator. Expect more experiential concepts - particularly in pubs - and a growing expectation that operators quickly respond to social media driven trends, supported by more agile menu and NPD processes.

Sustainability is becoming simpler but more urgent. Consumers expect operators and suppliers to lead with clear, credible action - particularly around local sourcing, plant forward menus, and reducing complexity. Pressure is mounting across the supply chain, with legislation such as EPR accelerating change.

Finally, health continues to evolve into an everyday behaviour. Consumers want help making healthier choices, pushing operators to integrate clearer guidance, more balanced options and transparent communication into menus and formats.

Together, these forces call for greater agility, innovation and deeper consumer understanding across the AFH sector.



Gabe Cook

The Ciderologist's View

What a difference a year makes?

The summer of 2024 is not one that will live long in the memory, primarily because it was so wet, soggy and cool. The summer of 2025, in contrast, was one of the hottest and driest on record. And if there's one cider statistic that everyone is familiar with, it's that cider's consumption massively over-indexes between April and September. Of course, I am an advocate for cider to be consumed all through the year, leaning into bolder, richer styles (bold tannic cider, ice cider, mulled cider etc), but I recognise the 'cider = summer link' is a stubborn mule to shift.

So, the hot long summer of 2025 should mean that total volume of cider consumed in the year is much greater than the damp squib of 2024, right? Well, no, actually. As this report shows, total volume sales have actually decreased. So, what's happening here then? I believe it's another indicator of the changing nature of all drinks consumption. Firstly, this is a general reflection the record low levels of alcohol consumption as a nation since records began in 1990 (IWSR Dec 2025). Secondly, there is a continued fragmentation of the number and type of drinks consumed. No longer are (certainly younger) consumers pigeon holed by being described as a wine drinker, beer drinker or cider drinker. Category loyalty is increasingly in the rear view mirror.

The IWSR report also indicates that total abstention has not increased, which demonstrates drinkers are moderating their consumption. They can do this in two converse ways. Firstly, they could explore the increasingly significant low/no space. For cider, this continues to grow apace. Joining the established brands from major players – Thatchers Zero, Inch's Zero etc – are a raft of craft offerings, such as Chance Clean Cider and Hogan's High Sobriety.

Considerably less, explored, but with great potential is mid-strength cider. Beer has done a solid job of exploring this 1.2% abv to 3.4% abv space with dedicated brewers such as Small Beer and other sensational offerings from classic brewers, such as The Kernel's Table Beer. At the time of writing, I have become aware of two ciders imminently entering the market specifically targeting this space, albeit at different ends of the abv spectrum. Keep an eye out for Westons Stowford Press Sweet (3.4% abv) and Nightingale's Light Bird (1.5% abv), alongside, I suspect a number of other exponents during the course of the year.

Slightly perversely, moderation can also be achieved by drinking less but better (and potentially more alcoholic). **Vintage Ciders** with their powerful flavour and punchy abv continue to grow and this plays to the advantage of the crafted end of the cider segment where the average price per litre is greatest, but where the flavour experience is maximised also. Volume within the crafted segment also continues to grow as a result of major retailer listing for brands such as Sandford Orchards Devon Red (TESCO) and Showering's Triple Vintage (Waitrose).

Crafted's rise – now accounting for 25% of all cider sales by volume - along with the drive for less but better, has also shown an uplift in volumes sales of the sharing bottle format. Westons 145th anniversary-celebrating 1880 in 750ml bottle screwcap saw greater sales than expected, whilst modern French cider makers Sassy have improved their distribution and sales in the last 12 months. The 750ml bottle is also home to the legion of micro Fine Ciders available in the UK, showcasing unique cider making techniques (naturally sparkling, barrel aged, wild fermented), rare varieties and single orchards.

Flavoured ciders see their volumes continue to drop as consumers of this segment transfer into something newer and more exciting. The rise of pre-mix cocktails, canned wines, new fashioned RTDs etc represent a change from yet another flavour iteration. A tranche will have also switched into 'apple', possibly for the first time the thanks to the rise of ciders that eschew tannic structure for easy soft fruitiness.

I still believe that **classic apple cider** remains the great opportunity for the wider category over the next few years, with an exploration of the different flavour profile achieved through the use and celebrations of different varieties; plus a continued appreciation of the sustainable benefits of the orchards that provide cider's key raw material.

What is certain is that for cider to return to growth it is going to have to undergo some kind of paradigm shift like we saw with the Magner's Effect of 2006. Relying upon sales of pint on sunny days and fruit cider shoring up the category appear to be a thing of the past. It is going to be fascinating to see who grabs the initiative and what ciders emerge in the coming years.

THE CIDER EXPERTS

THE CIDER EXPERTS

Kathryn Chabowska

Head of Buying
Brewing & Brands

While our overall cider category has seen a challenging time in 2025, it's the authentic, crafted cider manufacturers like Westons Cider which have been adding significant value to our business.

Westons has a very clearly differentiated draught portfolio which clearly aligns to our draught beer business making it much easier for our teams and customers to navigate.

We're able to offer a complete and compelling draught range across mainstream affordable quality outlets to premium discovery outlets and right through to those craft venues where consumers are eager to experience new and exciting taste profiles.

The keg challenge for 2026 will be to help outlets maximise their value through right brands in outlet, mirroring their outlet style, occasion and consumer demographic.

THE CIDER EXPERTS

Lee Williams

Category Manager
Beer & Cider

LWC Drinks

Tap numbers on bars are going to be challenged throughout 2026 as we're seeing the growing emergence of fruit flavoured draught beer like Jubel and also the rise of no & low alcohol draught offerings, particularly Guinness 0.0%.

From an outlets' perspective maintaining quality could be an issue as ROS historically has been lower on these categories. No & Low in particular is a noisy category

The consumer, fickle in their priorities, we've noticed is migrating back to what they know best, those brands they're familiar with, have confidence in and can trust. It's all about value but not at the expense of quality.

This transition is very much flattening the good, better, best model with the middle-ground squeezed as consumers either migrate to good or best.

Clear focusses for our cider category in 2026 will be around the continued growth in apple, the role of provenance & authenticity and how we satisfy a flavoured cider demand now that dark fruits have fallen out of favour.

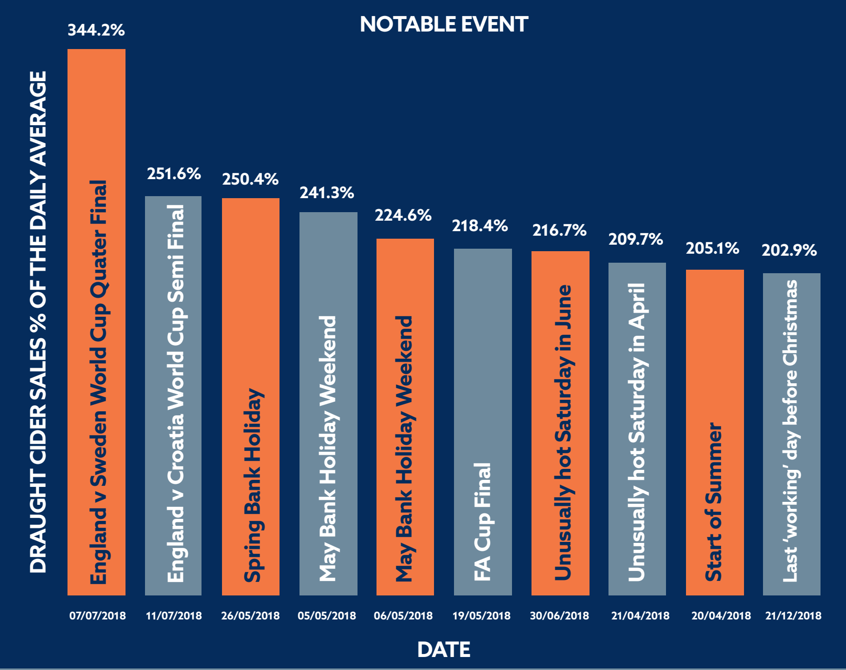
Brands which occupy a strong position in both On & Off Trade will continue to do well and brands which challenge the options around draught apple ciders' taste profile will enthuse the cartegory, particularly around sweetness and ABV.

TALKING POINTS

WORLD CUP 2026

This summer presents the biggest opportunity for cider sales since 2018, which was the last time we had a men's summer world cup. In the 2019 cider report we reported the best selling cider days of 2018, and world cup games featured highly. The Quarter Final, in which England played, saw draught sales at 344.2% of the daily average.

TOP 10 DRAUGHT CIDER TRADING DAYS IN THE ON TRADE



We can now see the combination of a big sporting event and a hot sunny day can potentially deliver over three times the average daily sales for an operator or retailer. It is thereforevital that some forward planning is put in place to ensure that these opportunities are maximised.

In the off trade, the peak week for cider volumes for the entire year was the week ending 30th June 2018, where England played both Panama and Belgium, helping to drive cider sales 59% above the weekly average. It cannot be over-estimated how important this period from June 11th to July 19th is to the cider category. It is vital that sufficient stock is available in both on trade outlets, and off trade stores, to capitalise on the associated drinking occasions.

England's games also fall at reasonable times in the UK, rather than the early hours of the morning for example, which will help maximise the sales opportunity. Scotland's games fall at 2am and 11pm.

England vs Croatia - June 17, Dallas, 9pm (UK time)
England vs Ghana - June 23, Boston, 9pm (UK time)
Panama vs England - June 27, New York-New Jersey, 10pm (UK time)

COMPLEXITY AND COSTS

Its no secret that the drinks industry and therefore cider is facing challenges from a regularity standpoint.

Extended Producer Responsibility (EPR) is a policy framework holding producers and brand owners financially and physically responsible for the entire lifecycle of their products and packaging. This is adding cost which unfortunately ends up costing cider drinkers more for their products.

Minimum unit pricing in Scotland and Wales also adds costs for consumers and Wales recently announced they are increasing this by 30% from 50p per unit to 65p from October, to match Scotland. It means a can of lager currently available for £1 will cost at least £1.30, a £2.50 bottle of cider will increase to £3.25 and a bottle of whisky now costing £14 will cost a minimum of £18.20.

There is also the proposed Deposit Return Scheme to consider. The deposit return scheme for drinks containers will be introduced in October 2027 in England, Northern Ireland, and Scotland. There is still some uncertainty as to whether Wales will be included or implement their own. This will add a refundable deposit at the point of purchase, likely 20p, on single-use drinks containers. This not only adds 20p to the initial purchase price of the product, but the costs of administering the scheme are likely to drive prices up further.

So, if we just look at costs in isolation as an aside from the important sustainability and alcohol harm goals, with EPR, MUP and DRS to contend with the marketplace has never been more challenging for the drinks industry. And with consumers still hard-pressed and with concerns about the cost of living, the impact on the end price has the potential to be significant.

LOW AND NO ALCOHOL CIDER

Total value is now **£52.9M** with **21.5 million** litres sold in the latest year, putting this sub-category at approximately **5.8%** share of cider.

In the off trade low and no alcohol cider has had another strong year of growth. **Value** sales are up **37.3%** driven by both an increase in purchase frequency **(+15.2%)** and increased basket size **(+23.8%)**. Interestingly, household penetration has decreased slightly so its no longer new shoppers driving the growth.

The no and low cider shopper is younger and more affluent than total cider suggesting that the former is attracting a new audience. **5.2%** of cider buyers buy **no and low cider** only, but account for only **1.3%** of spend so no and low is still a small part of the cider category. It does however perform a supporting role with **12.7%** of buyers buying both **standard cider and low and no alcohol cider**, accounting for **14.4%** of spend.

FROM FRUIT TO APPLE:

Why lower levels of alcohol now feels right for apple cider drinkers.

A significant proportion of UK cider drinkers are very familiar drinking 4% ABV ciders, and this has been driven by the success of fruit-flavoured cider growth in the past ten years.

As fruit variants with vibrant flavours and approachable sweetness have become mainstream, drinkers have grown comfortable with less ABV, creating a behavioural shift that can now extend into traditional apple cider.

This evolving preference aligns with broader moderation trends and the demand for sessionable drinks that still deliver a great taste and refreshment.

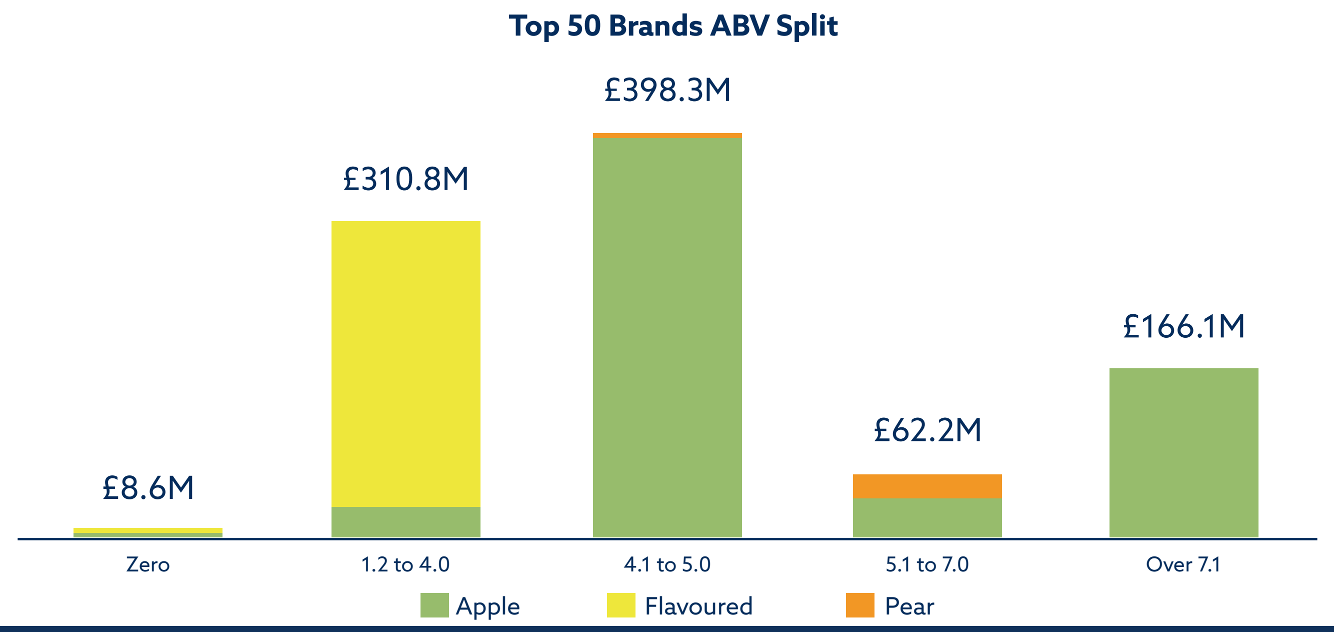
Consequently, authentic apple ciders with lower alcohol levels are an opportunity to position as a purposeful choice within both on-trade and off-trade, broadening cider's appeal without diluting the drinking experience.

TALKING POINTS

TOP 50 BRANDS ABV SPLIT

If we look at the abv of the top 50 brands by value, the 2nd largest abv band is **1.2% to 4.0%**.

However, only **10%** of this band is **apple cider** so it is very much under-represented. With apple cider in year-and-year growth it feels the right time to address the in-balance and look at more lower abv apple options. Currently only 3 brands sit in this space – **Thatchers Juicy Apple, Inchs Cloudy Apple** and **Compton Orchard**



Did you know?

Over 1 in 20 UK adults have now tried weight loss injections, this has the potential to be a real disruptor to the grocery industry. It will be interesting to monitor the effect this has on alcohol consumption in the coming years

THE OFF TRADE DRINKING OCCASION IS MORE RELAXED & CHILLED

18.7%

In the off trade the number one occasion is a **quiet night in** (+3.2ppts YOY)

76.2%

of off trade serves are accompanied with food.

+2.4ppts

The off trade has seen an increase in light snacks (+2.4ppts).

Biggest increase in motivation for drinking cider is 'to have time for myself', up 3.2ppts

top 3 off trade cider drinking motivations

#1 to wind down or chill

#2 to spend quality time

#3 to have time for myself

CIDER OCCASIONS

THE ON TRADE DRINKING OCCASION IS MORE UPBEAT & HIGHER TEMPO

16.9%

In the on trade the biggest drinking occasion is a **sociable get together** (+1.8ppts YOY) so higher tempo than the off trade

48.9%

of on trade serves are with food and plays an important part of the cider drinking experience. In the on trade crisps/nuts/bagged snacks are the most popular accompaniment to cider.

No. 1

on trade cider drinking motivation is 'to have a laugh' with 15.1% of serves

In the on trade 'to treat or reward myself', has seen the biggest increase in serves

In both channels most cider serves are on a Saturday, in both cases over a quarter of serves are on this day of the week. Saturdays have become slightly less common in the off trade, and more common in the on trade perhaps suggesting cider drinkers are choosing to watch Saturday sports in the pub. Fridays have become more popular with gains being seen in both the on and the off trade, over 20% of serves are on a Friday.

OFF TRADE

There are five key dynamics to discuss in this section, which have characterised the off-trade Cider market this year:

#1
Apple Cider is **driving the market**

#2
Average price per litre has continued to rise, so value performance is holding up better than volume YOY

#3
Cider's top tier, **the crafted Cider segment**, is the fastest growing

#4
Cider makers are increasingly moving into cans, which is shifting the format mix of the market

#5
Household penetration continues to fall

Apple cider has seen a year of solid growth with value sales up **5.0%**. Flavoured cider is in decline and share has fallen to **28.5%** of the category, compared to apple at **67.4%** share.

One of the biggest changes this year has been in price per litre. This went from **£2.60** two years ago, to **£2.75** last year and now the average is **£2.82**. This increase will be linked to inflation but, there will also be some trading up in the market with shoppers buying better quality Ciders.

As average price rises we are seeing a decline in the sales of larger pack sizes with packs bigger than ten seeing a decline of **5.5%** when compared to last year. Christmas 2025 saw a higher percentage of spend on promotion, with **45.6%** of value sold with any trade promotion. This is an increase from the **42.4%** seen the previous Christmas, as shoppers use deals as a way to manage their budgets.

The highest quality cider segment is crafted. This consists of heritage and traditional ciders, often with apples from a single year's harvest and produced from an independent or family company. Share of crafted cider increased from **23.5%** a year ago to **25.1%** of market value. Strong year-on-year growth of **7.6%** has further increased the crafted segment's foothold in the category.

Cans now make up **65.2%** share of category value and are the only format in growth at **+3.6%**. Glass bottles make up **26.8%** share and are seeing a small decline year-on-year. However, at the premium end
of the category, within the crated segment, glass bottle sales are up **3.7%**.

Currently **39.6%** of UK households buy Cider down from **40.9%** a year ago, and **41.5%** in 2023. The challenge for the Cider industry is to broaden its appeal to the over **60%** of the UK that do not currently buy Cider. A combination of retaining current shoppers and working to recruit new ones should be a key part of any growth plan.

CONVENIENCE CIDER FIXTURE

Half of all cider sales go through the convenience channel, so getting the range right is incredibly important. With less space to play with, one way to alleviate pressure on in-demand refrigerated space is to place single bottles and cans for impulse shopping occasions in the fridge and then use ambient fixture space and stacks for larger packs.

The **crafted** segment is performing well in convenience as well as in total market and there is still headroom to grow, this segment makes up **22%** of value in the convenience channel, compared with **25%** in total market. Stores should stock multiple crafted apple skus in sufficient facings to maintain stock, space should be prioritised for best sellers to maximise availability. In terms of spend, crafted cider averages a higher pence per litre so can help grow revenue whilst offering a premium product to cider drinkers.

The **value amber** segment grew **5.8%** in this channel in the latest year, so although small in terms of share, a value offering such as two litre plastic bottle would be expected.

WINE	BOTTLED CRAFTED CIDERS		BEER
WINE	PREMIUM BOTTLED & CAN CIDERS	LOW OR NO ALCOHOL CIDER	BEER
WINE	VALUE AMBER 2L	4 PACK CANNED APPLE & FLAVOURED CIDER	BEER
WINE	LARGE PACK MAINSTREAM APPLE & FLAVOURED CIDER	CRAFTED MULTIPACKS	BEER

STOCKING RECOMMENDATIONS

FOUR BAY SUPERMARKET CIDER FIXTURE

Competition for space has never been higher with the likes of ready-to-drink cocktails, adult soft drinks and functional drinks all creating pressure. A solid range that works the space as hard as possible is key to growing the cider category.

It is critical that the bestselling brands are given the right number of facings on shelf, keeping these brands in stock should take priority over endless choice of flavours. Apple cider remains the foremost cider type so should account for approximately two thirds of the fixture.

Crafted cider bottles should be over-spaced to capitalise on market growth. Leading crafted SKUs should be available in multipacks to cater to big shop missions and help maintain stock of the singles. Within crafted cider, where space allows, bag in box cider can add interest to a range offering something different in terms of still cider and in a larger format well suited to sharing.

Can formats represent sixty five percent of the market, so choice across four packs and ten packs is essential but increasingly single cans should also be considered. Bigger packs can also be stacked away from the main fixture to free up shelf space and raise the profile of cider in key footfall areas of the store.

It is expected that more development will be seen in the 4% abv and below space for apple cider, and this should be incorporated into space plans.

BOTTLED CRAFTED CIDERS	BOTTLED CRAFTED CIDERS	CRAFTED CIDER SMALL MULTIPACKS	PREMIUM & MAINSTREAM APPLE CIDER BOTTLES	UNIQUE AND DISTINCTIVE BRANDS & FORMATS / WORLD CIDERS / REGIONAL & LOCAL CIDERS	
FLAVOURED CIDER SINGLES	CRAFTED BAG IN BOX CIDERS	LOW OR NO ALCOHOL CIDER			
VALUE AMBER 2L	4 PACK CANS APPLE CIDERS	4 PACK CANS APPLE CIDERS	4% ABV & BELOW APPLE CIDERS	4 PACK CANS FLAVOURED CIDERS	4 PACK CANS FLAVOURED CIDERS
LARGE PACK MAINSTREAM APPLE CIDERS	LARGE PACK MAINSTREAM APPLE CIDERS STOWFORD PRESS 10 PACK	CRAFTED MULTIPACKS	FLAVOURED CANS LARGE MULTIPACKS		

THE CIDER MARKET IS WORTH £1.1bn, +0.1% YoY

401m litres of Cider were purchased, -1.7% YoY

The Big 4 supermarkets account for 60% of all Cider sales, the same as a year ago. (Tesco, Asda, Sainsbury's and Morrisons)

The average price of Cider per litre is **£2.82,** up from £2.75 a year ago and £2.60 two years ago

39.6% of UK households buy Cider

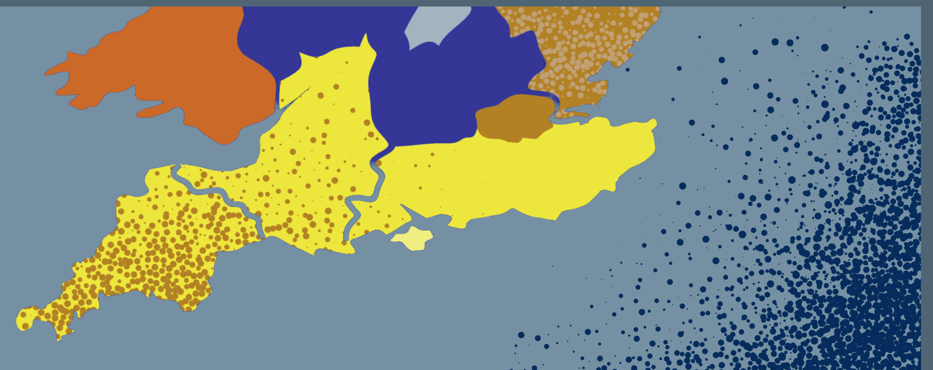
Households in the UK purchase an average of **33.2 litres** of Cider per year, down 1.2% compared to last year

The average household makes **10.3** shopping trips for cider a year

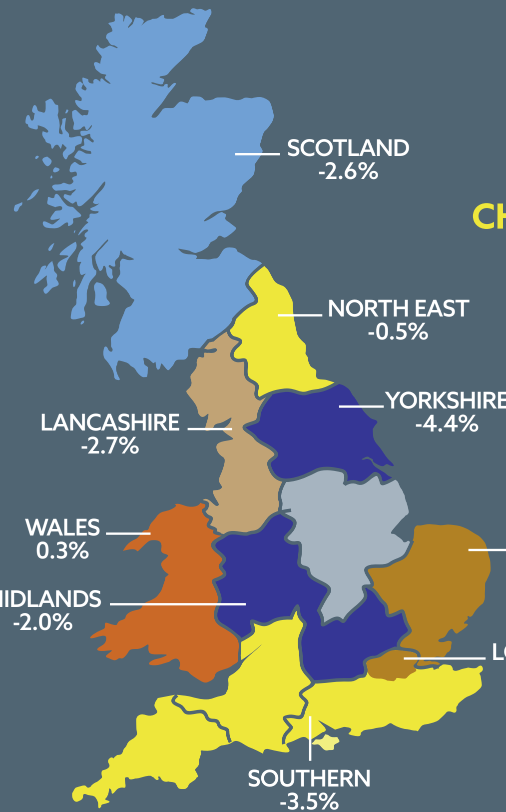
Cider continues to have a

SOUTHERN BIAS

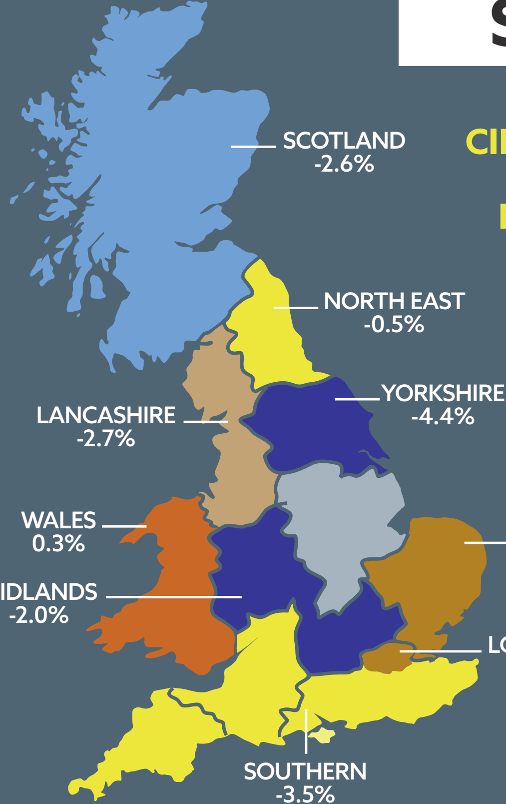
...with the 5 most southern TV regions making up 64% of Cider volume sold. This is even higher for crafted Cider with 72% of volume coming from the south.



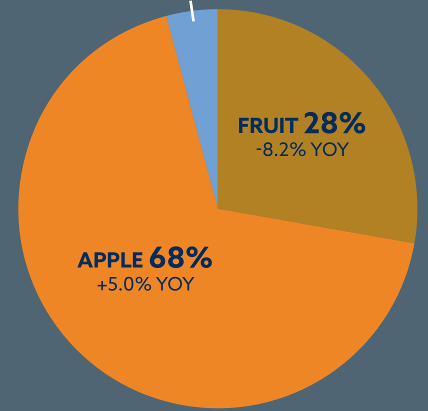
CIDER & PERRY VOLUME SALES % CHANGE VS YEAR AGO



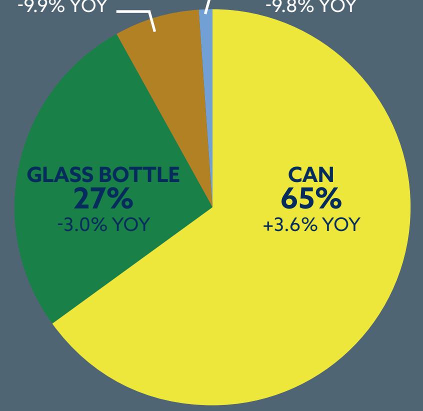
CIDER & PERRY % SHARE BY REGION



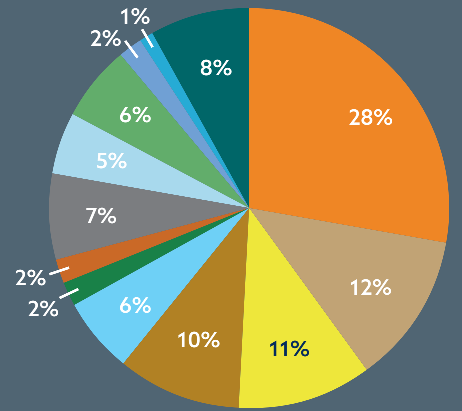
CIDER VALUE BY FLAVOUR YOY



CIDER VALUE BY FORMAT YOY



CIDER VALUE BY RETAILER YOY



Sources: Circana 52w/e 27th Dec 2025. Kantar P13 52w/e 28th Dec 2025.

There are two main formats in the cider category – glass bottles and cans. Plastic bottle has become a much smaller part of the category in recent years and is now less than **7%** of value.

Cans have seen growth in the last year, and this has led to an increase in share from **63.3%** a year ago, to **65.2%**.

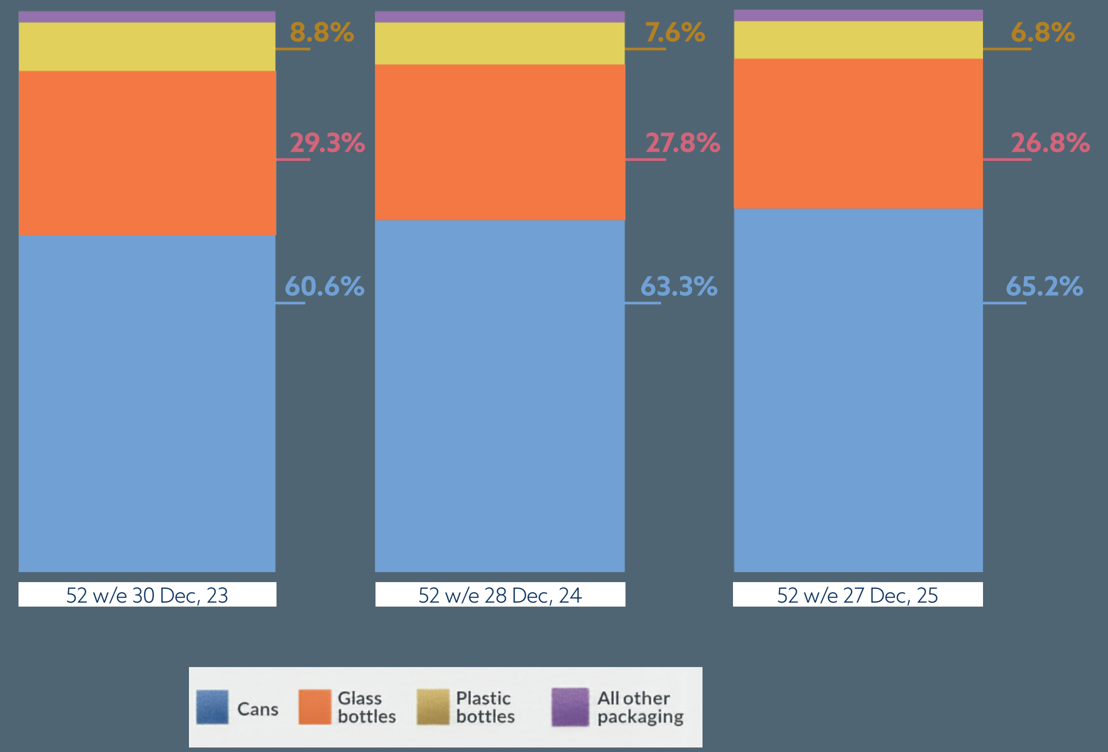
The decline in glass bottles is partly down to some brands actively switching out of bottle and into can. If we look specifically at the crafted cider segment, glass bottles are up **3.7%** year-on-year, so this format has a vital role within more premium cider.

Within cans, 440ml x 4 is the biggest pack size worth **£218M** followed by 440ml x 10 at **£172M**.

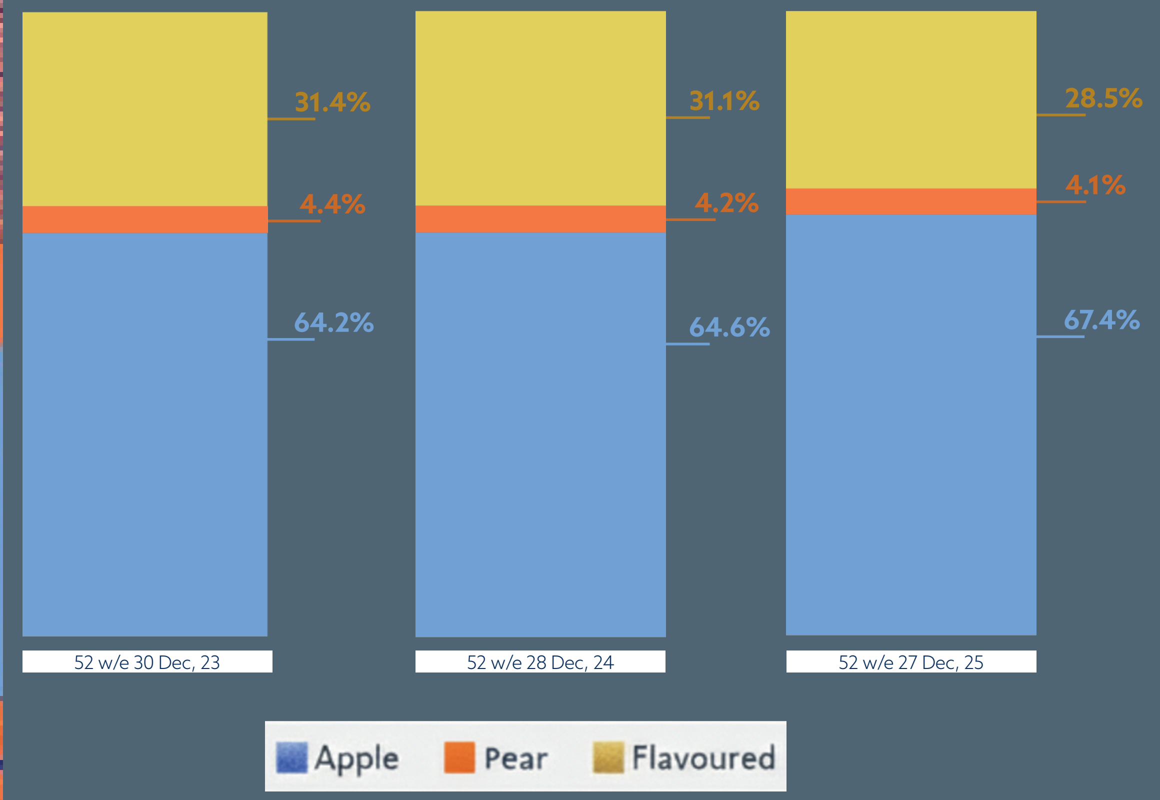
An emerging area of growth is pint cans with the 568ml single can format up **55.8%** year-on-year.

MARKET SHARE BY FORMAT

YOY
CANS +3.6%
GLASS BOTTLE -3.0%
PLASTIC BOTTLE -9.9%
BAG IN BOX -9.8%



YOY
APPLE +5.0%
FLAVOURED -8.2%
PEAR CIDER & PERRY -2.7%



Apple cider continues to the largest part of the cider market, worth £762M equating to a 67.4% share. Value sales have grown 5.0% year-on-year.

Flavoured cider has seen a decline with share decreasing to 28.5% which is the lowest it has been in recent years. The biggest change has been on Strongbow Dark Fruits which sold £7.8M less this year than last year.

Pear cider does show a decline versus last year however there are pockets of growth, Henry Westons Vintage Pear has added almost £600k in sales and is now worth £1.17M. Kopparberg Vintage Pear 500ml can is also doing well +20% year-on-year.

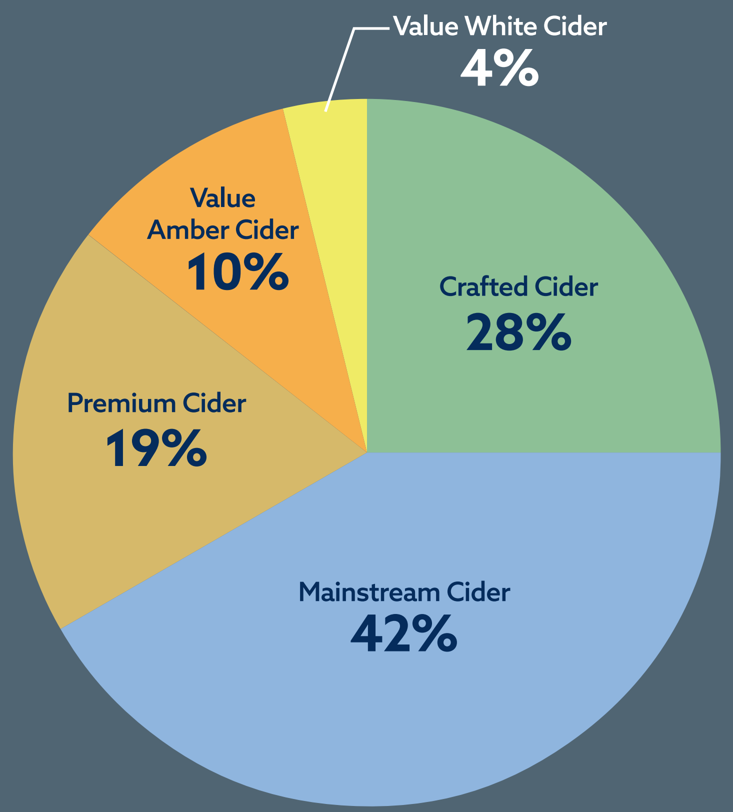
MARKET SHARE BY SEGMENT

Cider is segmented into five product groupings:

VALUE WHITE
VALUE AMBER
MAINSTREAM
PREMIUM
CRAFTED

Crafted has a higher average price than total cider and consists of traditional and heritage products, often made my independent or family owned cider makers.

This top tier is in robust growth and contributing additional value to the category having grown by over **£20M** in the last year.



MARKET SHARE BY SEGMENT

CRAFTED
+7.6%
YOY

PREMIUM
-3.3%

MAINSTREAM
-1.3%

VALUE AMBER
+3.6%

VALUE WHITE
-9.5%

Premium and **mainstream** cider have performed behind total market **(+0.6%)** and, as a result, have lost share. **Mainstream** however remains the largest part of the market at **42%** share of value, and **47%** share of volume. **Crafted** has made another share gain going from **23%** a year ago to **25%**. **Crafted** cider has also made progress in the convenience channel moving from **20%** category share last year to **22%** share.

Value amber cider has seen some growth, as cost of living concerns continue to impact the market, but remains at just **10%** share. The average cost of value amber cider is £2.00 per litre, whereas the total cider average is £2.82 per litre.

TOP 10 CIDER MAKERS (EXCL OWN LABEL)

Rank	Cider maker	Sum of Latest MAT	% change 52 weeks
1	HEINEKEN	£333,521,055	-1.8%
2	THATCHERS (EST. 1904, PEOPLE WHO CARE ABOUT CIDER)	£227,098,786	10.1%
3	KOPPARBERG	£142,379,130	-3.8%
4	WESTONS (HEREFORDSHIRE, CIDER MAKERS, 1880)	£112,652,367	-0.6%
5	Aston Manor Cider	£74,815,395	23.0%
6	C&C group plc	£47,904,378	-12.0%
7	MOLSON COORS beverage company	£29,753,900	6.1%
8	Accolade Wines	£26,175,455	-7.5%
9	BROTHERS	£11,375,777	-3.0%
10	Healeys EST. 1980	£10,664,502	-4.8%

HEINEKEN REMAINS THE LARGEST CIDER MAKER IN THE UK.

However, their share of the category has dropped slightly from 30.2% last year to **29.5%**. **Thatchers** now have **20%** share.

Overall, the **top ten** cider makers account for **89.9%** of sales, so they continue to take almost £9 out of every £10 spent on cider in the UK off trade.

TOP 10 CIDER MAKERS (EXCL OWN LABEL)

Of the top ten only three cider makers have seen growth, highlighting the challenges in the current cider market. **Molson Coors** has moved up one place to seventh after being eighth in last year's report.

Growth on Rekorderlig Wild Berry and Aspall Draught has boosted sales this year. **Thatchers** growth has come from Thatchers Gold and Juicy Apple, and **Aston Manor** have had a strong year of sales with Knights.

TOP 20 BRANDS

1.


Strongbow Original
Value Sales: **£130,625,911**
Value Share: **11.6%**
YOY%: **-5.7%**

2.

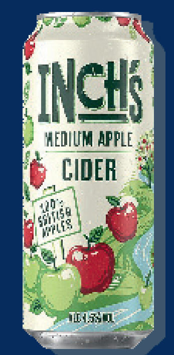

Thatchers Gold
Value Sales: **£94,297,480**
Value Share: **8.3%**
YOY%: **11.7%**

3.

Henry Westons Vintage
Value Sales: **£81,507,776**
Value Share: **7.2%**
YOY%: **-2.0%**

4.


Strongbow Dark Fruit
Value Sales: **£73,230,026**
Value Share: **6.5%**
YOY%: **-9.6%**

5.


Inchs Medium Apple Cider
Value Sales: **£57,711,144**
Value Share: **5.1%**
YOY%: **16.9%**

6.


Kopparberg Strawberry & Lime
Value Sales: **£50,073,161**
Value Share: **4.4%**
YOY%: **-10.2%**

7.


Kopparberg Mixed Fruit
Value Sales: **£40,683,408**
Value Share: **3.6%**
YOY%: **-8.2%**

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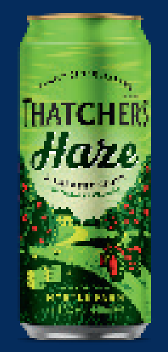
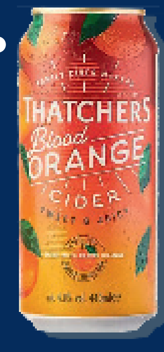


Thatchers Somerset Haze
Value Sales: **£38,346,757**
Value Share: **3.4%**
YOY%: **-0.2%**

9.


Magners Original
Value Sales: **£34,009,199**
Value Share: **3.0%**
YOY%: **-10.1%**

10.


Thatchers Blood Orange
Value Sales: **£25,742,828**
Value Share: **2.3%**
YOY%: **-4.7%**

Fourteen of the top twenty cider brands in the market are apple cider reflecting apple cider's **67%** value share. Strongbow Original is the number one cider brand in the market with **11.6%** share, a slight decrease from the **12.3%** share seen a year ago. However, this has been countered by an increase in share for Inchs which has moved up the ranking to fifth versus sixth in last year's cider report. Thatchers Gold is in second place and is growing and gaining share.

Henry Westons Vintage is third place at brand level, however if we look at individual SKUs, the 500ml single bottle is the number one cider product in the market.
1. Henry Westons Vintage 500ml x 1 £66.2M
2. Thatchers Gold Cans 440ml x 10 £44M
3. Strongbow Original Can 440ml x 18ct £43.9M

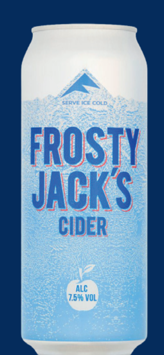
TOP 20 BRANDS

11.


Knights Premium Cider
Value Sales: **£20,279,117**
Value Share: **1.8%**
YOY%: **79.8%**

12.


Lambrini
Value Sales: **£17,373,179**
Value Share: **1.5%**
YOY%: **-8.7%**

13.


Frosty Jacks
Value Sales: **£15,790,208**
Value Share: **1.4%**
YOY%: **-12.2%**

14.


Thatchers Katy
Value Sales: **£15,607,036**
Value Share: **1.4%**
YOY%: **5.0%**

15.


Crumpton Oaks Apple Cider
Value Sales: **£15,357,724**
Value Share: **1.4%**
YOY%: **26.6%**

16.


Thatchers Juicy Apple
Value Sales: **£14,580,968**
Value Share: **1.3%**
YOY%: **661.1%**

17.


Scrumpy Jack
Value Sales: **£13,362,168**
Value Share: **1.2%**
YOY%: **-7.2%**

18.


Thatchers Vintage
Value Sales: **£12,883,006**
Value Share: **1.1%**
YOY%: **35.1%**

19.


Thatchers Apple & Blackcurrant
Value Sales: **£12,444,784**
Value Share: **1.1%**
YOY%: **-22.2%**

20.


Crofters Apple Cider
Value Sales: **£10,907,136**
Value Share: **1.0%**
YOY%: **-11.4%**

The strength of crafted cider is evident here with Henry Westons Vintage, Thatchers Katy and Thatchers Vintage all featuring in the top brands Strongbow Dark Fruit is the number one flavoured cider brand, at 4th in the overall ranking. Kopparberg Strawberry and Lime and Mixed fruit are the 2nd and 3rd placed flavoured cider brands. Thatchers Blood Orange is the 4th largest flavoured cider and 10th biggest brand overall and is the only non-berry/dark fruit flavour in the top twenty.

Lambrini is the only perry/pear cider in the top twenty brands, it is in decline year-on-year but at **£17M** still has an impressive scale.

This year's top five includes a mix of apple and flavoured ciders. Having two vintage ciders feature so highly shows the strength of vintage ciders in recent years.

1	2	3	4	5
				
INCHS CLOUDY APPLE CIDER	KOPPARBERG STRAWBERRY VARIETY PACK	OLD MOUT MANGO & PASSIONFRUIT CIDER	HENRY WESTONS 1880 VINTAGE	KOPPARBERG VINTAGE APPLE
£9.5M	£4.7M	£3.5M	£3.0M	£1.0M

Inchs Cloudy launched in March 2025 and is now worth over **£9M**, with this value split between the 440ml can ten pack and four pack.

In second place **Kopparberg** Strawberry Variety pack is new to Tesco and the convenience channel. This 10 x 330ml can pack features four flavours: strawberry and lime; strawberry and pineapple; strawberry and mango; and strawberry and raspberry. This is a good example of NPD not needing to be extreme unusual flavours, a twist on a classic and / or a new pack format can be just as effective if not more so. In third place **Old Mout** Mango and Passionfruit shows that tropical flavours continue to be popular, both in a can pack and a single glass bottle.

Henry Westons 1880 Vintage launched in early 2025 to celebrate 145 years of Westons cider. Kopparberg vintage apple takes fifth spot at a value of **£1.0M**, this 500ml single can is a departure from the usual glass bottles typical of vintage ciders.

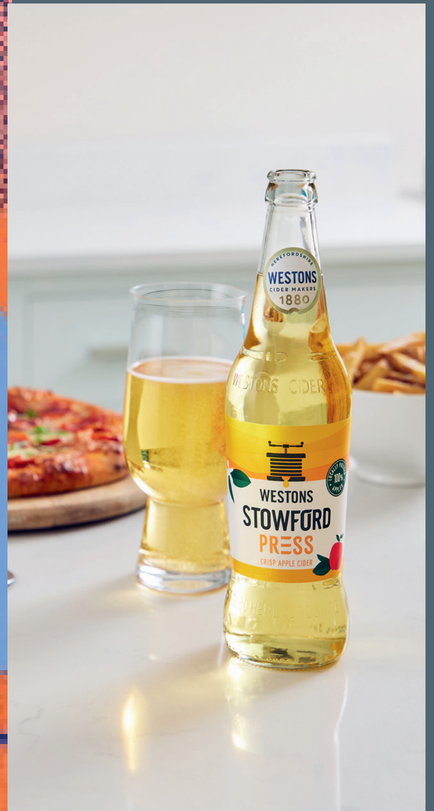
TOP 5 NPD

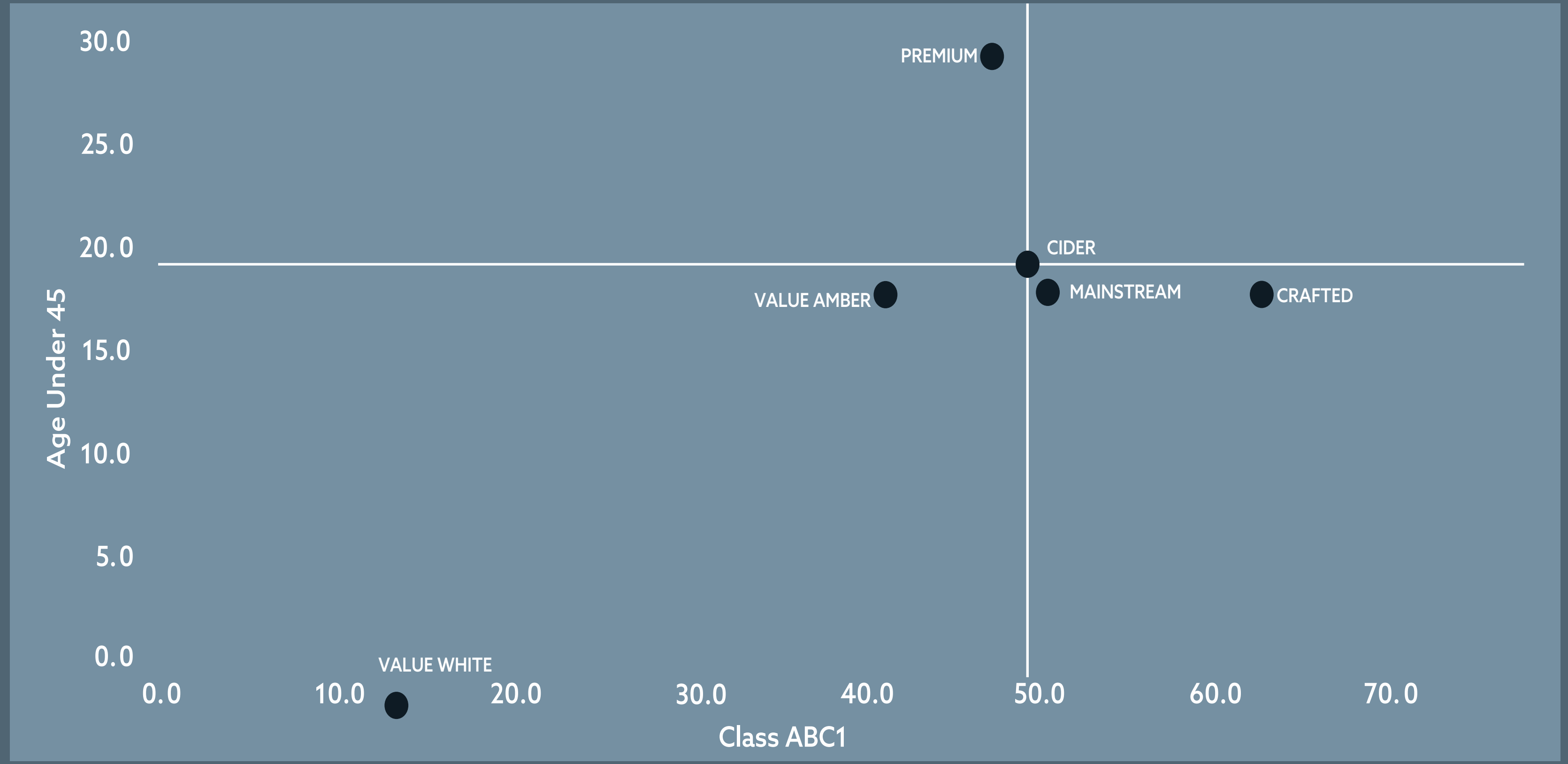
CRAFTED CIDER

Crafted cider has once again had a strong year of growth and is now worth **£284M**. Whilst total cider value is **+0.6%**, crafted grew **+7.6%** contributing an additional £20M to the cider category. Share has gone from **23.5%** last year to **25.1%**.

This segment adds value to the overall category attracting an average price per litre of **£3.87** compared to total cider at **£2.82/L** and value amber cider at **£2.00/L**.

Crafted has the highest amount of ABC1 shoppers with **63.2%** of spend coming from this demographic



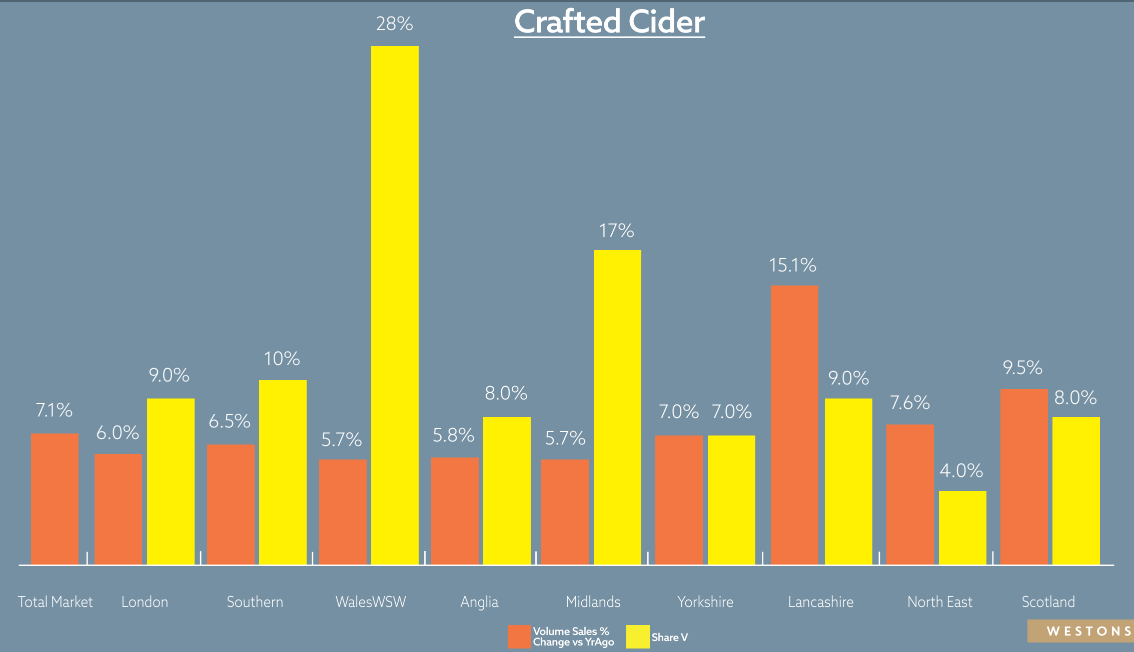


TOP 10 CRAFTED BRANDS

The top three remain the same as last year. Thatchers Katy has moved up to fourth from fifth last year. Thatchers Juicy Apple is new to the top ten in fifth place. Aspall Draught has moved above Aspall Premier Cru, after a year of double digit growth. Henry Westons British Vintage has entered the top ten due to strong sales of the 750ml bottle. Just outside of the top ten, Knights Herefordshire Vintage has seen success providing an accessible entry point into vintage cider with their competitively priced 500ml single can.

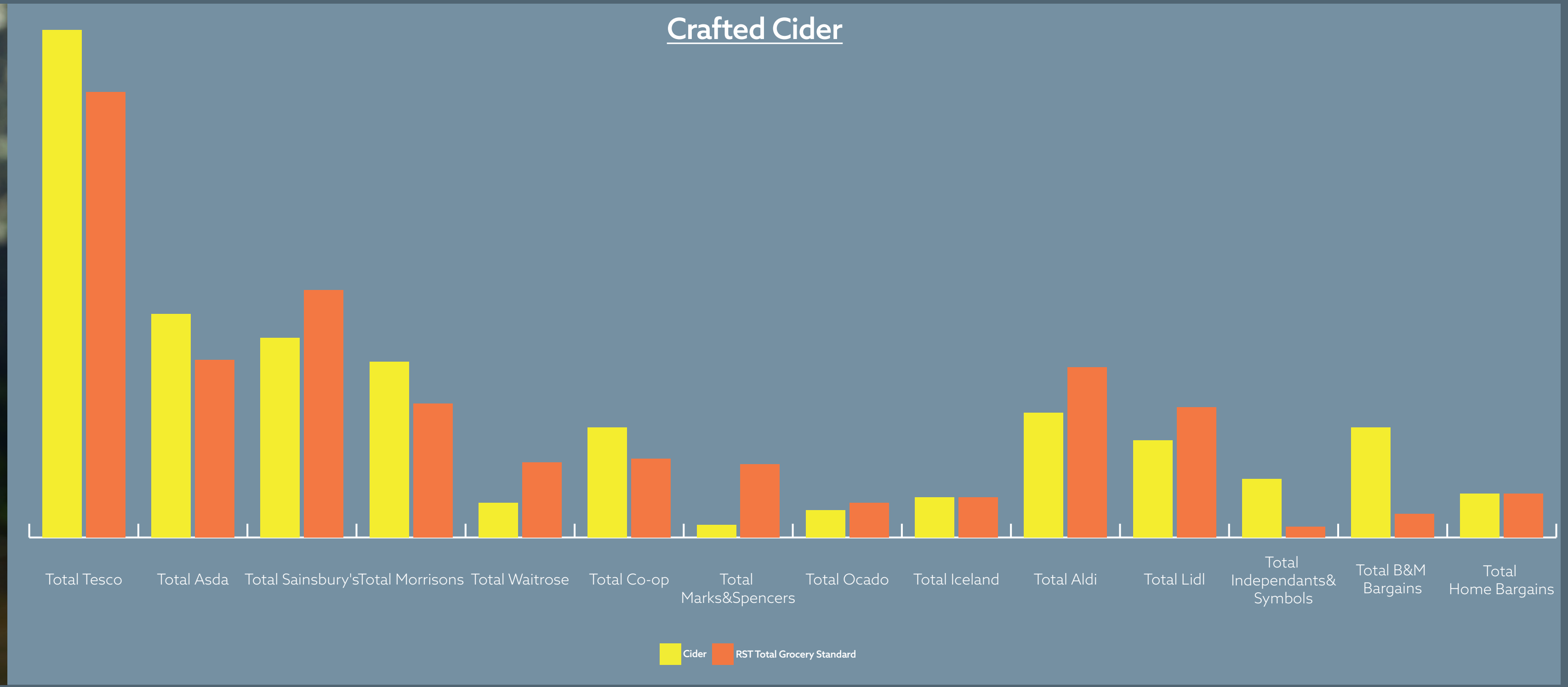
Crafted volume is in growth in every region, which is not the case for total cider. Total cider has 20% of its volume sold in Wales and the south west, for crafted cider this is even higher with 28% of volume going through this region, so presence in this geography is incredibly important.

In-store space given to crafted cider should be upweighted in key areas such as Wales, the south west and the midlands. For bestselling crafted SKUs, enough facings to prevent out of stocks is of critical importance, as empty shelves at key trading periods mean sales opportunities are lost. Crafted has been a key driver of overall cider performance for a good few years now so an optimised crafted range is the best way to grow sales.



RETAILER CIDER SHARE VS TOTAL GROCERY SHARE

Tesco is the largest cider retailer with 27.7% share of spend. This is an overtrade compared to their 24.3% share of grocery spend, so the cider category punches above its weight with them. In last year's report Tesco had 27.4% share of cider, so they have gained some share this year. Asda, Morrisons and The Co-op continue to overtrade in cider. The importance of the convenience channel to cider is evident here with Independents & Symbols taking 3.2% of spend.

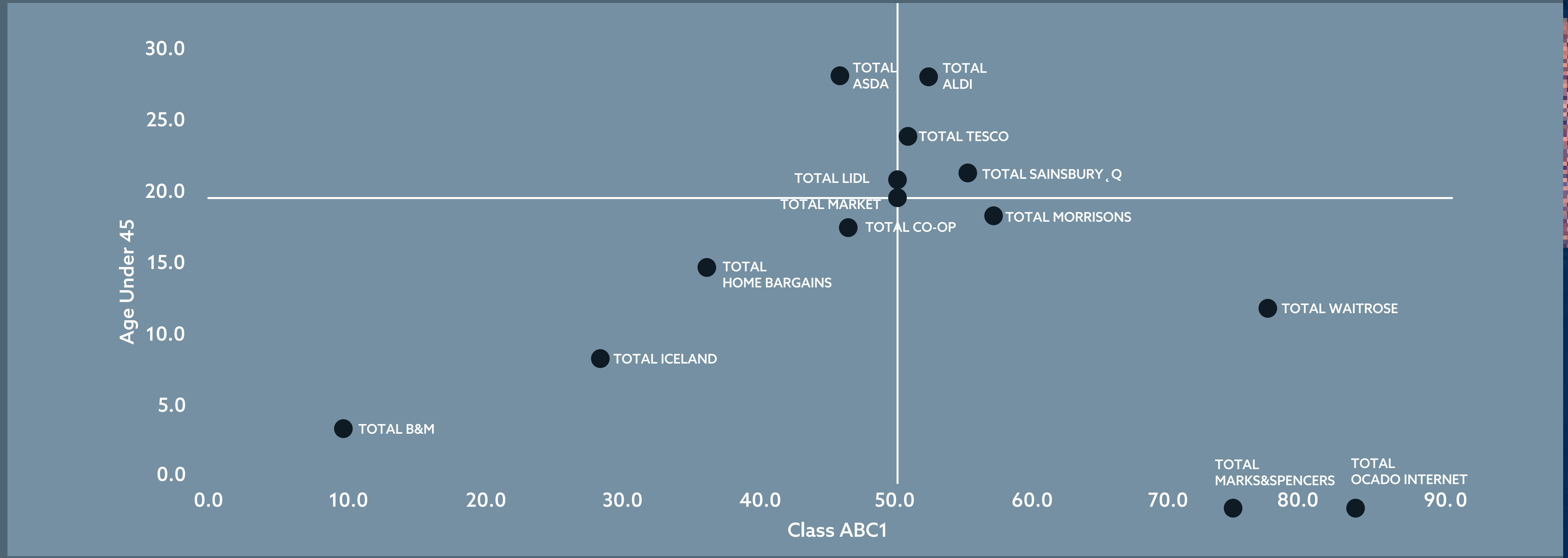


CIDER SHOPPER DEMOGRAPHICS BY RETAILER

Looking at shopper profile Ocado, M&S and Waitrose have the most affluent shopper. 83.8% of Ocado spend comes from ABC1 shoppers. Aldi had the youngest cider shoppers last year, but this year Asda have just edged it with 27.5% of their shoppers aged under forty-five to Aldi's 27.4%. B&M has an older and less affluent cider shopper. Lidl closely mirrors the shopper profile of Total Cider.

The breadth of profiles highlights that there is no one-size-fits-all approach to selling cider, activation and pricing strategies will very much depend on the retailer.

CIDER RETAILERS



CONVENIENCE OVERVIEW

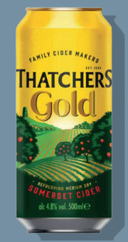
The convenience market now makes up **51.7%** of total cider sales, a slight increase from 51.1% a year ago, making it an incredibly important growth engine for the category. Year-on-year performance is ahead of total market with value **+1.8%** (vs. +0.6%) and volume **-1.5%** (vs. -1.7%).

Like total cider, in convenience, crafted is in robust growth at **+10.4%**. Crafted has **22%** value share compared to **25%** in the total market so there is still headroom for further crafted growth in the convenience channel.

1.

HENRY WESTONS VINTAGE
1 x 500ml
£44,294,881

2.



THATCHERS GOLD CAN
4 x 500ml
£20,260,023

3.

KNIGHTS PREMIUM CIDER CAN
1 x 500ml
£20,112,734

4.

STRONGBOW DARK FRUIT CAN
4 x 440ml
£19,323,918

5.

STRONGBOW CAN
10 x 440ml
£18,428,002

6.

STRONGBOW DARK FRUIT CAN
10 x 440ml
£18,305,387

7.

STRONGBOW CAN
4 x 440ml
£18,129,700

8.

THATCHERS GOLD CAN
10 x 440ml
£17,661,147

9.

INCHS MEDIUM APPLE CIDER CAN
4 x 440ml
£16,905,794

10.

STRONGBOW CAN
4 x 568ml
£16,256,943

CONVENIENCE OVERVIEW

Henry Westons Vintage 500ml is the number one SKU in the convenience channel, more than twice the size of the second place product and growing.

It is also the only glass bottle cider in the top ten giving it a point of difference from the cans. In third place, **Knights** Premium can is the fastest growing SKU of the ten.

Traditionally pack sizes are smaller in this channel with singles and four packs dominating the top ten. Larger packs have a role however as **Strongbow** Original 440ml 10 pack is the fifth highest ranked pack, and two other ten packs feature here.

Within convenience, independents are seeing the best year-on-year performance with value **+6.5%**. Independents represent a sturdy growth opportunity particularly for crafted cider which currently has just **18%** share so has a way to go to match the market at **25%**. Symbols are seeing cider growth of **3.7%** while convenience multiples are down versus last year.

ON TRADE

THIS YEAR THE CIDER CATEGORY HAS BEEN SHAPED BY 5 KEY DYNAMICS:

#1 Draught Apple continues to be the driving force

#2 Premiumisation, while becoming the norm, is focussed at both ends of the category, with an emerging dynamic within premium around super-premium & crafted

#3 Challenges to draught cider tap distribution due to NPD, Premium World Lager, Stout & No/Low

#4 Continued decline in outlet numbers is effectively reducing the cider market (& opportunities)

#5 Continued strength of major brewery composite deals across beer & cider, not just from a volume perspective but from a cellar management one

Premium draught taps have been the driver in 2025, led largely by draught apple as numbers are significantly migrating from standard cider to premium cider.

DRAUGHT CIDER AVERAGE COUNT OF BRANDS IN DRAUGHT CIDER STOCKISTS

CAT	TOTAL CIDER	APPLE CIDER	FRUIT CIDER	STANDARD CIDER	PREMIUM CIDER
YA	2.3	1.6	0.7	1.3	1.0
TY	2.2	1.5	0.7	1.1	1.1
% CHG	-1.9%	-3.7%	+1.8%	-11.7%	+10.8%

Cider taps are becoming increasingly challenged by competing draught categories, in particularly No / Low and Premium World Lager as retailers look to capture the attention of consumers and enhance footfall. Premium 4% lager is losing favour as retailers view that as an easy switch for No & Low and Premium World Lager.

DRAUGHT LAGER AVERAGE COUNT OF BRANDS IN DRAUGHT LAGER STOCKISTS

CAT	NAB/ LAB	PREMIUM 4% LAGER	PREMIUM LAGER	PREMIUM SPECIALITY LAGER	PREMIUM WORLD LAGER	STANDARD LAGER
YA	0.1	0.5	0.7	0.1	1.5	0.9
TY	0.1	0.5	0.7	0.1	1.6	0.9
% CHG	+28.3%	-12.8%	-4.1%	-6.3%	+2.5%	-8.5%

THE HARSH CLOSURE RATE SINCE THE PANDEMIC HAS NOW BOTTOMED OUT & AT THE TOPLINE LEVEL THE MARKET HAS STABILISED AT SOME 15% SMALLER THAN IN 2019

98,914

THERE ARE CURRENTLY 98,914 LICENSED PREMISES IN GB, OVER THE PAST YEAR THIS HAS DECLINED BY -206 NET SITES

4,865

SITES OPENED

4,659

SITES CLOSED

MARKET DECLINING - 0.2%

L&T deeply affected as sites close & overperforming sites taken under managed operation

The major brewer deals across beer, lager & cider offering keen commercial inducements to portfolio purchase have deepened during 2025. This is restricting choice for outlets and ultimately consumers looking for something more authentic with an interesting back story and quality provenance cues. With authenticity being a key purchase driver and reason to visit this has to be a more considered decision in 2026.

This has also become exacerbated in 2025 with the continued roll out of cellar management systems effectively restricting draught cider distribution and increasing cost to serve costs for the independent cider makers.

MARKETPLACE

ON TRADE SNAPSHOT

£2,041.4M IS SPENT CIDER IN THE ON TRADE +3.1% VS YA

Total volume **241 million** litres purchased, down **-4.0%** vs YA

The average price of a pint of cider is **£4.79**, **+£0.32** vs YA

The average on trade outlet sells **27.2 hls** of cider per year, **-3.6%** vs YA

On Trade value share is **71.9%** draught serve **+2.9%** growth YoY and **28.0%** packaged serve, **+3.4%** YoY

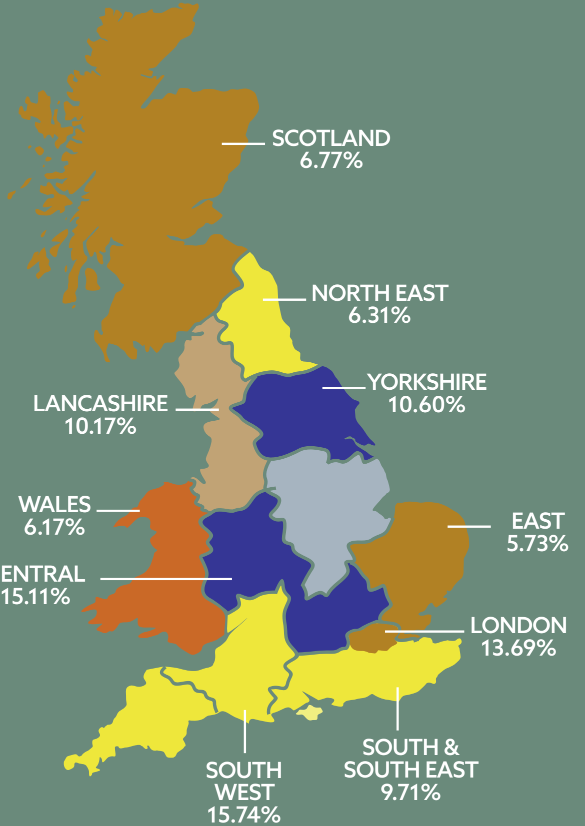
On Trade volume share is **76.6%** draught serve, **-4.7%** YoY and **23.4%** packaged serve, **-1.5% YoY**

There are **88,795** cider distribution points (apple & fruit), **-0.4%** vs YA

TOTAL CIDER

Over **55%** of total cider volume is focussed in just 4 TV regions – South West, Central, London & Yorkshire). Each region has a very different cider proposition be it draught, apple, flavoured draught or packaged

	# RANKING	% SHARE	% GROWTH
South West	1	15.74	-0.3%
Central	2	15.11	-5.1%
London	3	13.69	-1.7%
Yorkshire	4	10.60	-3.3%
Lancashire	5	10.17	-5.6%
South & South East	6	9.71	-0.7%
Scotland	7	6.77	-6.9%
North East	8	6.31	-5.4%
Wales	9	6.17	-5.8%
East	10	5.73	-5.1%



DRAUGHT APPLE

The South West is the leading region for draught apple cider with just over **19.4%** of total UK draught apple volume and is increasing YoY

	# Ranking	% Share	% Growth
Central	1	15.14	-6%
East	2	5.23	-2.5%
Lancashire	3	8.39	3.1%
London	4	14.70	2.4
North East	5	5.48	-1.5%
Scotland	6	5.99	-2.0%
South & SE	7	10.44	0.5%
South West	8	19.43	-0.2%
Wales	9	6.60	-5.8%
Yorkshire	10	8.59	-3.9%

DRAUGHT FRUIT

Despite Central currently being the largest TV region for draught flavoured cider, the northern bias remains for flavoured cider. Although the South West remains the largest draught cider geography draught apple remains the largest share.

	# Ranking	% Share	% Growth
Central	1	19.36	-6.4%
Yorkshire	2	16.57	-1.0%
Lancashire	3	13.09	-24%
South West	4	9.60	-17.8%
North East	5	9.35	-18.4%
Wales	6	6.75	-14.1%
London	7	6.59	-29.2%
Scotland	8	6.46	-27.7%
South & SE	9	6.44	-19.6%
East	10	5.79	-5.3

PACKAGED APPLE

London remains by far is the largest geography for packaged apple cider and is showing positive growth in pockets

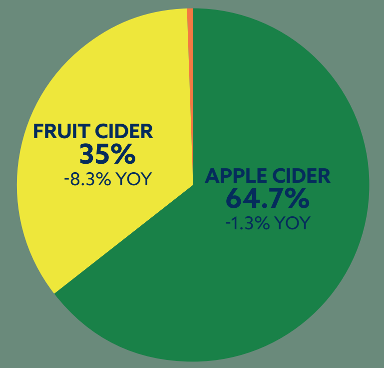
	# Ranking	% Share	% Growth
London	1	21.21%	-4.6%
Lancashire	2	11.60	-5.8%
South West	3	10.95	-3.9%
Scotland	4	10.57	10.2%
Central	5	9.9	-0.7%
South & SE	6	9.29	8.1%
Yorkshire	7	8.27	6.1%
East	8	7.5	-14.6%
Wales	9	5.9	18.7%
North East	10	4.6	9.3%

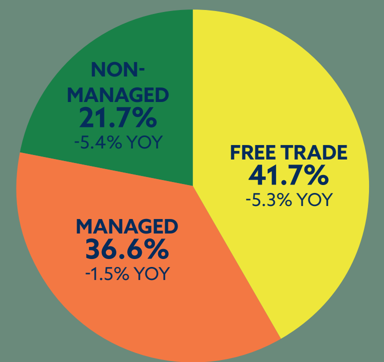
PACKAGED FRUIT

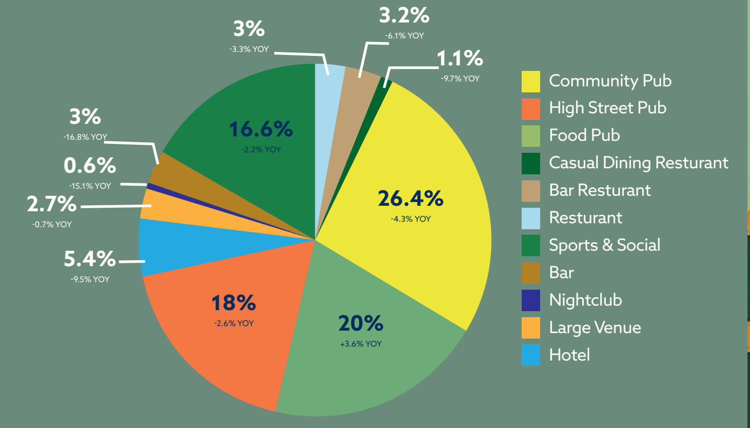
Packaged Fruit mirrors Packaged apple with London being the leading geography.

	# Ranking	% Share	% Growth
London	1	14.77	2.2%
Lancashire	2	13.04	-2.0%
Central	3	12.64	-0.3%
Yorkshire	4	12.47	-5.6%
South & SE	5	10.29	6.9%
South West	6	10.23	-3.7%
Scotland	7	8.59	-4.3%
East	8	6.84	-7.8%
North East	9	6.76	1.6%
Wales	10	4.39	1.8%

ON TRADE SNAP SHOT







THE GROWTH OF CRAFTED

Crafted growth continues strongly again in 2025 representing the most compelling category opportunity to add value and more importantly engage with consumers who are continually looking for discovery brands and brands with a truthful back story.

Crafted volume share continues to grow and now represents 12% of the total UK draught cider market but significantly represents 14% value share as the segment commands a much higher RSP than its mainstream counterparts

The crafted category is a diverse and dynamic category with an eclectic mix of styles, formats and flavours. Some regional, some national but all with premium credentials, authenticity and provenance at their core.

Vintage is a credible signpost of craftsmanship and true crafted producers can confidently claim higher authenticity cues. Vintage cider as characteristically produced from cider apples of single year's harvest.

The leading brands in this category include **Henry Westons Vintage, Aspall 4.5%, Cornish Orchards** and **Orchard Pig**. This category more than any other is seamlessly aligned to the ever-expanding premium world and sunshine Mediterranean beer category.

HENRY WESTONS VINTAGE IS THE UK'S NO 1 VINTAGE FAMILY

CRAFTED CATEGORY AVERAGE PRICE POINT IN OUTLET

Henry Westons Vintage	**£6.28**
Cornish Orchards	**£5.52**
Aspall 4.5% Cyder	**£5.22**
Orchard Pig Reveller	**£4.76**

ON TRADE

TOP 10 CIDER MANUFACTURERS

Rank	Manufacturer	Volume (hectolitres)	YOY
1	HEINEKEN	1,064,009.5	-1.0%
2	MOLSON COORS beverage company	429,113.5	-1.9%
3	THATCHERS	428,558.7	-2.8%
4	KOPPARBERG	159,873.7	-8.9%
5	WESTONS	112,213.5	-23.6%
6	C&C group plc	97,122.8	-11.4%
7	BUTCOMBE	4,558.7	-16.3%
8	AGRIAL	2,256.5	-22.2%
9	SHEPPY'S	1,151.9	-14.8%
10	BROTHERS	430.0	-47.3%

HEINEKEN CONTINUE TO LEAD THE MARKET AND HAVE GAINED SHARE SINCE 2025, +1.5PPTS

Driven extensively by the tactical movement from mainstream ciders into more premium formats in both apple and flavoured cider. Strongbow as a brand is suffering at the expense of Inch's and Old Mout.

The gap between the Top 5 and the category deepens with now just over **95.6%** value share of the total category., **+0.5ppts** vs 2024.

The category is now dominated by two RTM's being able to offer composite deals across LAD, effectively restricting choice for outlets

TOP 10 CIDER MANUFACTURERS

TOP 10 DRAUGHT APPLE CIDER BRANDS

		Value		
1	Inch's Medium Apple Cider	£254.9M	22.01 % Share	YOY +27.60%
2	Thatchers Gold	£216.3M	18.68 % Share	YOY +7.8%
3	Strongbow	£212.2M	18.32 % Share	YOY -6.0%
4	Aspall Draught Cyder	£147.2M	12.71 % Share	YOY +12.2%
5	Stowford Press Apple Cider	£70.1M	6.05 % Share	YOY -10.0%

THE UK TOP 10 DRAUGHT APPLE CIDER BRANDS REPRESENT 89.5% OF THE UK'S TOTAL DRAUGHT APPLE CATEGORY

TOP 10 DRAUGHT APPLE CIDER BRANDS

		Value		
6	Thatchers Haze	£60.7M	5.24 % Share	YOY -0.8%
7	Somersby Original	£29.2M	2.52 % Share	YOY +0.9%
8	Magners Original Irish Cider	£70.1M	6.05 % Share	YOY -14.5%
9	Cornish Orchards Gold Cider	£70.1M	6.05 % Share	YOY +3.9%
10	Thatchers Dry	£70.1M	6.05 % Share	YOY -25.7%

With a major shift in the Top 3, **Inch's** has leapfrogged to take the No 1 spot from Stronbow. Previously in 3rd place, **Inch's** has added **£55.1M** to the brand vs the previous year and now represents **22%** of the Total UK draught apple category.

All other rankings remain the same vs the 2024 Cider Report

TOP 10 DRAUGHT FLAVOURED CIDER BRANDS

	Value		
1	£115.4M	37.46 % Share	YOY -16.8%
2	£66.6M	21.62 % Share	YOY +21.6%
3	£35.4M	11.49 % Share	YOY -0.7%
4	£15.1M	4.9 % Share	YOY +10.3%
5	£9.1M	2.95 % Share	YOY -11.7%

A new edition for this year's Cider Report to sense check the overall draught flavoured category performance.

SIMILARLY TO THE DRAUGHT APPLE, THE UK'S TOP 10 DRAUGHT FLAVOURED CIDER BRANDS REPRESENT OVER 80% OF THE UK'S TOTAL DRAUGHT FLAVOURED CATEGORY

TOP 10 DRAUGHT FLAVOURED CIDER BRANDS

	Value		
6	£7.6M	2.47 % Share	YOY -20.0%
7	£6.4M	2.08 % Share	YOY -57.1%
8	£2.5M	0.81 % Share	YOY -19.6%
9	£0.3M	0.10 % Share	YOY -57.3%
10	NO FURTHER DRAUGHT FLAVOURED IN TOP 40 UK BRANDS		

Mirroring the Draught Apple category, the migration from mainstream to more premium executions continues. We see **Strongbow Dark Fruit** share being eroded by more the premium brands **Old Mout** and **Rekorderlig**.

TOP 10 PACKAGED CIDER BRANDS

		Value	Share	YOY
1	KOPPARBERG STRAWBERRY & LIME	£66.4M	11.59 % Share	YOY -1.7%
2	REKORDERLIG CIDER STRAWBERRY-LIME 4.0% ABV	£65.5M	11.43 % Share	YOY -10.1%
3	KOPPARBERG MIXED FRUIT	£55.4M	9.67 % Share	YOY +6.9%
4	REKORDERLIG WILDBERRIES PACKAGED	£54.3M	9.47 % Share	YOY -3.7%
5	Berries & Cherries OLD MOUT CIDER ALC 4.0% VOL	£51.7M	9.02 % Share	YOY +5.4%
6	MAGNERS SINCE 1935 ORIGINAL IRISH CIDER	£32.2M	5.62 % Share	YOY +3.7%
7	BULMERS ORIGINAL PACKAGED	£26.7M	4.66 % Share	YOY +1.9%
8	BULMERS RED BERRY & LIME PACKAGED	£23.7M	4.14 % Share	YOY +4.2%
9	OLD MOUT KIWI &LIME PACKAGED	£23.3M	4.07 % Share	YOY +15.3%
10	OLD MOUT BERRIES & CHERRIES ALC FREE PACKAGED	£17.9M	3.12 % Share	YOY +42.0%

KOPPARBERG STRAWBERRY & LIME HAS OVERTAKEN REKORDERLIG STRAWBERRY & LIME TO CLAIM THE TOP SPOT

Strawberry and Lime remains the top flavour in the packaged category but there has been a switch in the top two brands in the during 2025.

Interestingly packaged apple returns to growth across key brands and **Old Mout** Berries & Cherries remains the largest no / low SKU in 10th spot, growing at **42.0%** YoY

STOCKING RECOMMENDATION

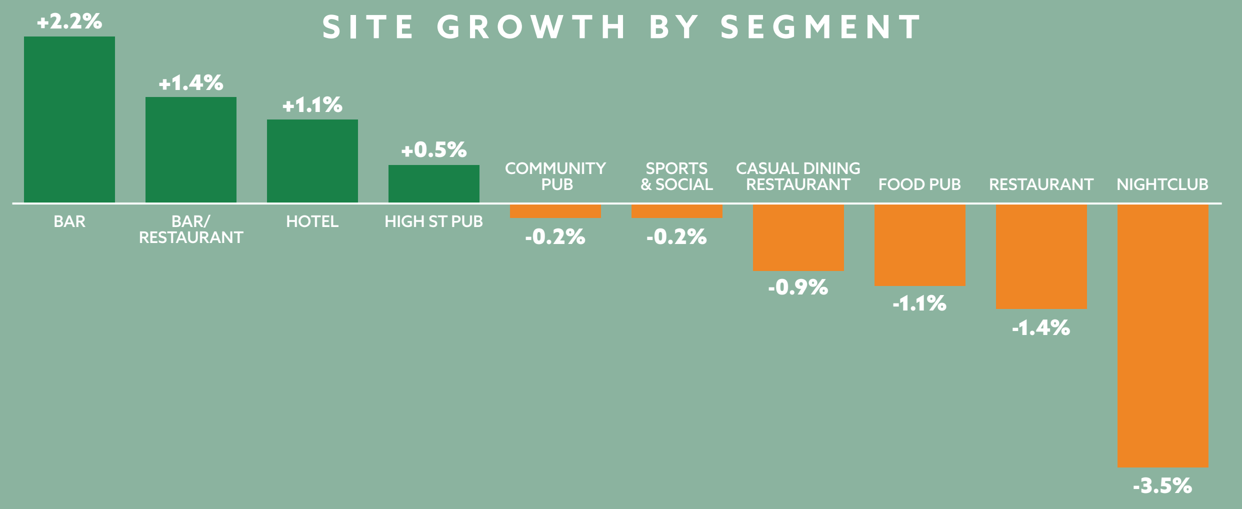
THE TOP CONSIDERATIONS FOR A VIBRANT CIDER RANGE

Cider range should be determined by a considered review of both macro and micro influences. Irrespective of whether it's a new outlet opening, a refurb or just a draught range review all considerations play an important role in driving revenue, relevance and footfall into outlet.

STYLE OF OUTLET

It's essential to match the outlet with the most appropriate style of cider, Consumers are willing to pay just that little bit extra for authenticity and provenance and this can be applied at both ends of the On Trade landscape from affordable quality sites up to premium discovery sites. Wet let venues have really resonated with consumers in 2025 rather than food led, with far more bars, bar/restaurants & high street pubs opening compared to casual dining and food pubs.

SITE GROWTH BY SEGMENT



DAY PART BEING SERVICED IS A KEY CONSIDERATION TOO

54% OF CONSUMERS DRINK CIDER 5PM - 8PM

46% LATE EVENING 8PM – 10PM

30% MID AFTERNOON 2PM – 3PM

Outlet stocking just a single draught has increased 0.2%, Outlets stocking 2 draught ciders has increased 0.2%, Yet outlets stocking 3 or more has declined -3.1%

STOCKING RECOMMENDATION

XX.X%
of Draught Cider stockists stock
1 DRAUGHT CIDER

XX.X%
of Draught Cider stockists stock
2 DRAUGHT CIDERS

XX.X%
of Draught Cider stockists stock
3+ DRAUGHT CIDERS

DRAUGHT CIDER AVERAGE COUNT OF BRANDS IN DRAUGHT CIDER STOCKISTS

CAT	TOTAL CIDER	APPLE CIDER	FRUIT CIDER	STANDARD CIDER	PREMIUM CIDER
YA	2.3	1.6	0.7	1.3	1.0
TY	2.2	1.5	0.7	1.1	1.1
% CHG	-1.9%	-3.7%	+1.8%	-11.7%	+10.8%

THE HIGHEST INCREASE IN TAP NUMBERS HAS BEEN IN PREMIUM CIDER +10.8%, THIS IS A WIDE RANGE OF STYLES INCL THE MOST PREMIUM, VINTAGE & CRAFTED CIDERS IN THE CATEGORY

GEOGRAPHY

This is probably the most important consideration and is covered in more depth in the following section. Important factors here are clearly differentiated range to ensure interest, premiumisation across both apple & flavoured and the inclusion of draught flavoured vs packaged based on volume.

REGIONAL CIDER OPPORTUNITY

DRAUGHT APPLE IS SIGNIFICANTLY GAINING SHARE ACROSS 9 OF THE 10 TV REGIONS.

The highest percentage point change has occurred across Lancashire, an historic flavoured cider geography (+6.69 pts), followed by Scotland (+5.73 ppts) and the North East (+4.19 ppts) another flavoured cider stronghold.

The decision on which format draught cider to stock is becoming ever more critical by region. Careful consideration needs to be given to the % share of draught apple and draught flavoured share. Delivering the most appropriate range will maximise value and ensure consumer engagement.

THE NUMBER OF OUTLETS WITH JUST ONE DRAUGHT CIDER TAP IS INCREASING

	TOTAL DRAUGHT CIDER RANKING 2025	% DRAUGHT APPLE SHARE 2025	% DRAUGHT APPLE SHARE VS 2024	% DRAUGHT FLAVOURED SHARE 2025	SUGGESTED NUMBER OF TAPS	DRAUGHT RANGE RECOMMENDATION
South West	1	88.23	2.16 ppts	11.72		2 x differentiated apple taps. No flavoured draught
Central	2	74.36	0.08 ppts	25.57		1-2 differentiated apple taps plus flavoured draught if appropriate volume
London	3	89.12	4.04 ppts	10.74		2 x differentiated apple taps. No flavoured draught
Yorkshire	4	65.81	-0.67 ppts	34.11		1 x apple tap + 1 x flavoured tap
South & South East	5	85.68	2.93 ppts	14.20		2 x differentiated apple taps. No flavoured draught
Lancashire	6	70.40	6.69 ppts	29.52		1 x apple tap + 1 x flavoured tap
Wales	7	78.38	1.56 ppts	21.55		1-2 differentiated apple taps plus flavoured draught if appropriate volume
North East	8	68.53	4.19 ppts	31.42		1 x apple tap + 1 x flavoured tap
Scotland	9	77.54	5.73 ppts	22.45		1-2 differentiated apple taps plus flavoured draught if appropriate volume
East	10	76.96	0.53 ppts	22.89		1-2 differentiated apple taps plus flavoured draught if appropriate volume

BRINGING CLARITY AROUND REGIONAL DRAUGHT RANGES

<75% APPLE SHARE

The range needs to be clearly differentiated to satisfy engaged draught cider consumers. These consumers are truly engaged in the category and will have a broad cider repertoire driven by the need for authenticity, provenance and discovery. Only consider draught flavoured cider seasonally for light nights refreshment where volume is sufficient then replace with a more characterful draught apple for dark nights sipping and savouring.

Key TV regions are: South West, Central, London, South/SE, Wales, Scotland & East

>75% APPLE SHARE

Less engaged draught apple cider drinkers, more likely to flex into draught flavoured cider depending on outlet and occasion. Ranging should consider draught flavoured.

Key geographies are: Yorkshire, Lancashire, North East

CONSIDERATIONS

- Outlet style, occasion and consumer demographics will all contribute to the ranging decision. With particular emphasis around a choice of premium mainstream or premium / super premium crafted brands
- With draught cider taps under increasing pressure the need to maximise value through every pint will become even more important. More premium ciders can command a much higher RSP than their mainstream counterparts
- More premium, destination food led and competitive socialising venues will only need a single premium draught cider.

TOP TEN LARGEST CIDER MARKETS BY VOLUME (2025 FORECAST)

THE UK IS LARGER THAN THE NEXT THREE COUNTRIES COMBINED.

#1

UNITED KINGDOM
830M LITRES

#2

SOUTH AFRICA
496M LITRES

#3

USA
156M LITRES

#4

AUSTRALIA
124M LITRES

#5

SPAIN
103M LITRES

#6

CANADA
98M LITRES

#7

ARGENTINA
97M LITRES

#8

GERMANY
69M LITRES

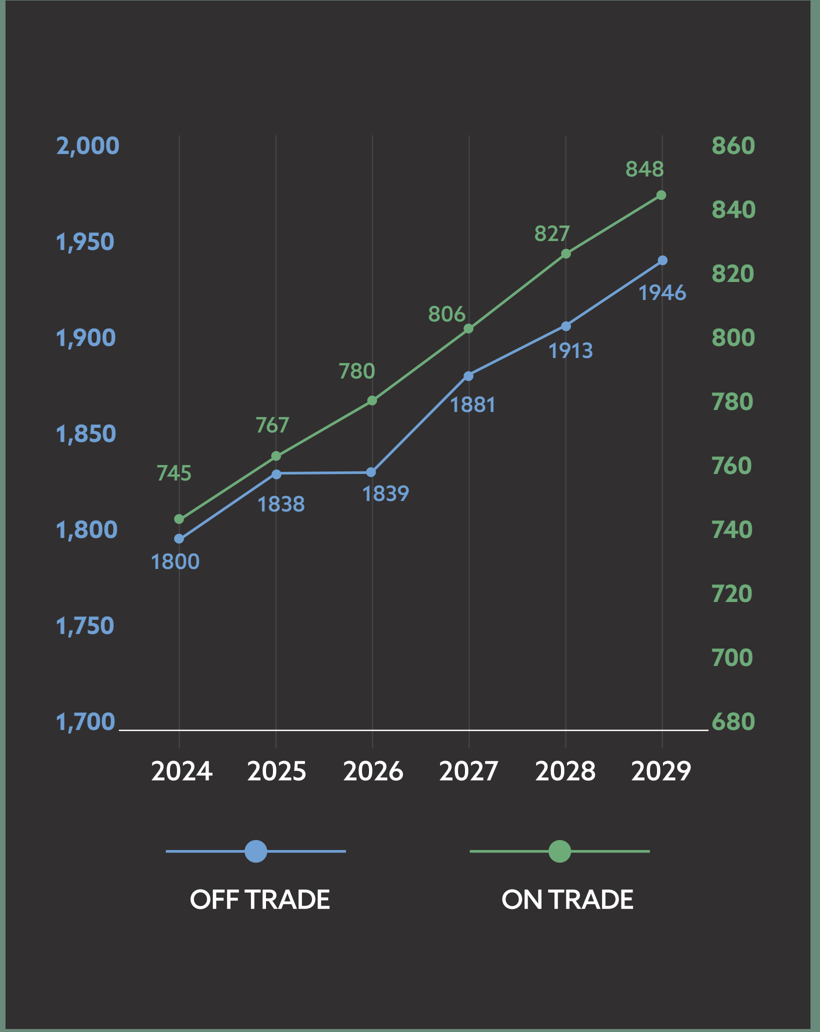
#9

REP. OF IRELAND
66M LITRES

#10

FRANCE
62M LITRES

Globally cider volumes are expected to increase in both the on and off trade channels in the coming years. The on trade is forecast to reach **848 million litres** and the off trade **1946 million litres** in **2029**.



INTERNATIONAL SNAPSHOT

WE'D LOVE TO HEAR FROM YOU!

We would really like to hear from readers and invite you to share your thoughts:

CiderReport@westons-cider.co.uk

Follow Westons Cider on LinkedIn for cider category updates

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CGA On Premise Measurement Service P12 30/11/2024
CGA Brand Index 27/12/2014
CGA Alix Partners Hospitality Market Monitor Jan 2025
CGA EPOS Data to January 2025,
CGA OPUS June 2024
Kantar Alcovision 12 m/e 31/12/2024
Kantar 52 w/e data to 29th December 2024
Circana UK 52w/e 52 w/e 28 Dec 2024
Globaldata January 2025

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