Hard Cider in the U.S.

2014 Edition (Published January 2014. Data through 2013. Market projections through 2018.) More than 25 pages, with extensive text, graphs, charts and tables

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This report looks at the hard cider category, charts its performance and describes the strategies of the leading brands, both domestic and imported. In addition, it charts the advertising expenditures of the top players. Beverage Marketing's exclusive market projections are also included.

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Inside:

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The answers you need

- What are the leading hard cider brands in the United States, and how have they been performing?
- How does the performance of the hard cider market compare with that of the U.S. beer market?
- What are the latest new product introductions?
- How is the hard cider market likely to develop in the future?
- What are per capita consumption figures likely to look like a few years down the road?

This report features

The inaugural edition of *Hard Cider in the U.S.* (a new addition to our *Focus Report* series line-up) examines a small but dynamic sector of the beverage alcohol marketplace and offers perspective on this emerging sector in the context of the larger U.S. beer market. It offers data and discussions including:

- An overview of the market for hard cider including market drivers and factors impacting category development
- Historical and current data quantifying the category in terms of volume and growth from 2009-2013, plus projections
- Discussion of the leading companies and their brands
- Volume growth and share data for leading hard cider producers including Boston Beer, C&C Group, MillerCoors, Heineken USA and Anheuser-Busch InB
- A detailed look at the size, growth and market share for leading brands including Angry Orchard, Woodchuck, Crispin Cider, Strongbow, Michelob Ultra Light Cider, Hornsby's, Magners, Cider Jack and HardCore
- The report also contains data on brands' advertising expenditures
- Beverage Marketing's five year forecast for the U.S. hard cider market's size and growth outlook through 2018

Focus Report

Hard Cider in the U.S.

January 2014

BEVERAGE MARKETING CORPORATION

RESEARCH • DATA • CONSULTING

NOTE: The information contained in this report is confidential and solely intended for the benefit of the immediate recipient hereof.

Table of Contents

Contents

TABLE OF CONTENTS

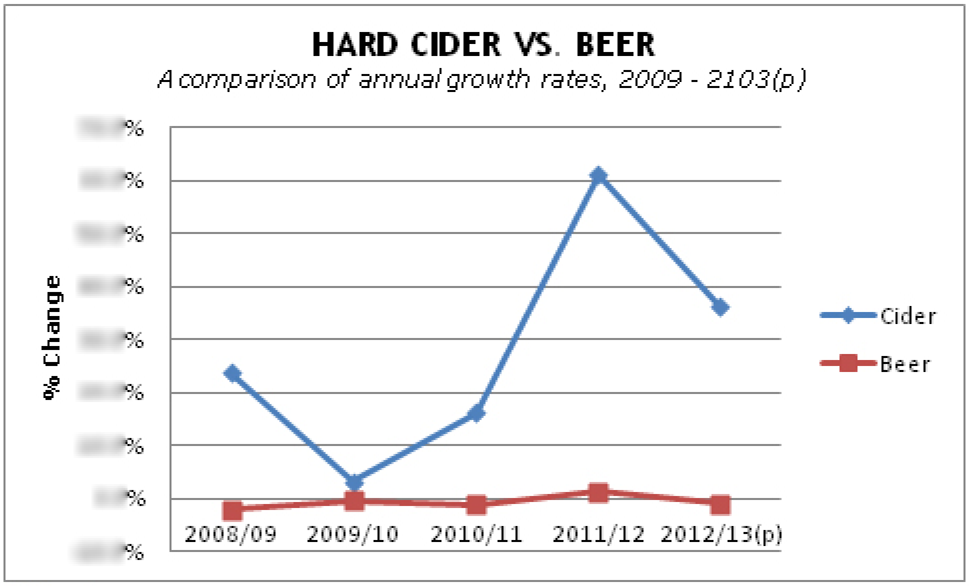
Focus Report

Hard cider is nothing new to the United States. Fermented apple cider has a lineage dating back to colonial days. What is new is a resurgent popularity and fast growth. (Exhibits 1, 2 and 3)

- Cider withered in the United States after Prohibition but it maintained a higher profile in European markets like England, France, Scotland and Spain.
- Indeed, several of the cider brands rushing into the rapidly expanding U.S. market originate in Europe.
- In the first years of the 21st century, the segment regularly declined. It did so significantly in 2002 and at comparatively moderate rates in each of the following three years. Growth resumed in 2006.
- The category entered its hot phase in 2011, when it notched the first of three consecutive double-digit annual growth rates.
- In February 2013, domestic cider-producers formed a trade group, the United States Association of Cider Makers.

The U.S. looks like a likely place for a hard cider culture, what with major apple producing states like New York, Washington and Michigan, but several non-agricultural factors contribute to the hard cider explosion of the current century's second decade.

- Hard cider is gluten free. Unless gluten is added during the processing phase of a particular flavor or brand, it naturally appeals to consumers aiming to pursue a gluten-free diet, which more and more Americans seem to be doing.
- More significantly, the ongoing appearance of new brands, and new flavors among those brands, provides consumers with more opportunities and reasons to give the category a try.
- The involvement of major beer companies translates into greater distribution and, hence, more ready availability.
- As hard ciders show up in more stores, restaurants and bars, adult consumers become more and more likely to give them a try – especially consumers looking for alternatives to beer or disinclined to select a flavored malt beverage.



(p) Preliminary
Source: Beverage Marketing Corporation

Exhibit 2

U.S. HARD CIDER MARKET
CHANGE IN VOLUME
2002 – 2013(p)

Year	% Change
2001/02	[illegible]%
2002/03	[illegible]%
2003/04	[illegible]%
2004/05	[illegible]%
2005/06	[illegible]%
2006/07	[illegible]%
2007/08	[illegible]%
2008/09	[illegible]%
2009/10	[illegible]%
2010/11	[illegible]%
2011/12	[illegible]%
2012/13(p)	[illegible]%

(p) Preliminary

Source: Beverage Marketing Corporation