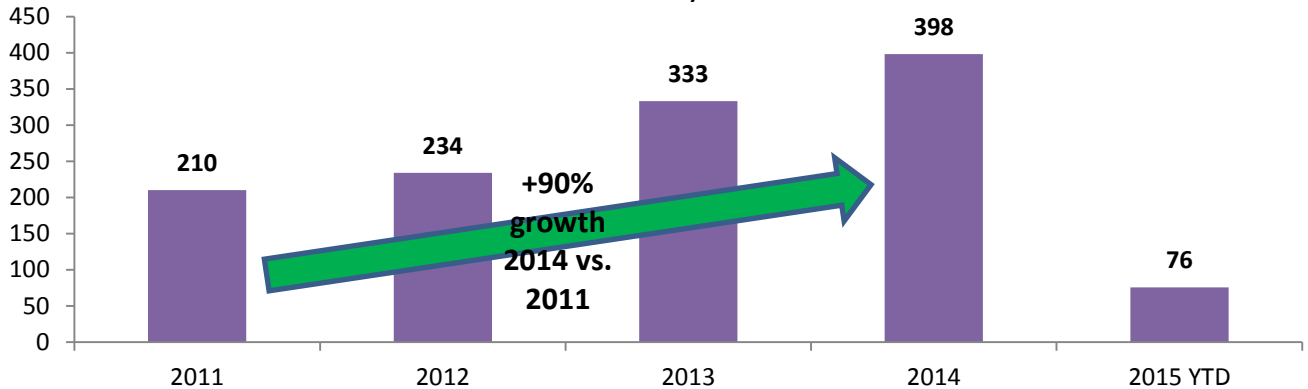


Mintel Quarterly Update

April 2015

Cider Alcoholic Product Launches

of Global cider launches, Jan. 2011- Mar. 2015



Of all cider introductions in the USA since 2011 have an Apple flavor

65%



Hop'n Mad Apple Hard Cider was launched in May 2015. The manufacturer is said to use the ripest apple, harvested by hand to ensure the highest quality. Click [here](#) to view on GNPD.



2 Towns Ciderhouse Bright Cider is hand-crafted in Oregon and made with 100% fresh-pressed Northwest apples. Click [here](#) to view on GNPD.



Leprechaun Winter Seasonal Hard Apple Cider is crafted from apples grown in the Pacific Northwest. Click [here](#) to view on GNPD.



Sonoma Cider The Anvil Bourbon Apple Cider is now available. The gluten and sulfite free product has been certified as organic. Click [here](#) to view on GNPD.



Reverend Nat's Revelation Newtown Pippin Hard Cider is naturally fermented to utter dryness with an only touch of fresh apple juice. Click [here](#) to view on GNPD.

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*Value Added Content: US Volume Sales of Hard Cider, 2010 - 14

| Year | 2.25-gallon cases (000) | % change | Index (2010 = 100) | Index (2014 = 100) |
|-------------|----------------------------|----------|--------------------|--------------------|
| 2010 | 5,150 | - | 100 | 26 |
| 2011 | 6,230 | 21.0 | 121 | 32 |
| 2012 | 10,120 | 62.4 | 197 | 52 |
| 2013 | 16,970 | 67.7 | 330 | 87 |
| 2014 (est) | 19,455 | 14.6 | 378 | 100 |
| 2015 (fore) | 22,984 | 14.6 | 446 | 118 |
| 2016 (fore) | 26,444 | 14.6 | 513 | 136 |
| 2017 (fore) | 29,884 | 14.6 | 580 | 154 |
| 2018 (fore) | 33,387 | 14.6 | 648 | 172 |
| 2019 (fore) | 36,936 | 14.6 | 717 | 190 |

Source: The Beverage Information & Insight Group, "2014 Beer Handbook"/Mintel

Mintel Category Trends – Beer & Cider 2015

Cider has traditionally played a small role in most alcoholic beverage markets, but has now become a popular drink in the North American market, as consumers embrace the refreshing alternative to beer. New product launches of cider has risen steadily in the last 12 months, with brewers particularly focused around cross-over beverages and flavour innovation.

Brands innovate around craft beer and hard cider hybrids:
Cider gains hops, while beers get infused with apple flavors

The last 12 months has seen how craft beer and hard cider manufacturers in North America have innovated around cross-over beverages. While hard ciders have been gaining hops in their formulation, craft beers have got infused with apple flavours.

Is there potential opportunities for more fruit ingredients in craft beers??

Hallelujah Hopricot Hard Cider



Reverend Nat's Hallelujah Hopricot Hard Cider is made with the finest American apples, hops, apricot juice and a carefully selected melange of spices (US)

Spur & Vine Hopped Apple Cider



Square Mile Spur & Vine Hopped Apple Cider is a Northwest version of the classic American hard cider, with the addition of Galaxy hops. The hand-pressed product is gluten free (US)

