



**CRAFTING
CIDER'S
FUTURE
TOGETHER**

Cider in Tomorrow's Beverage Market

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What We'll Cover

- **Macro Trends Driving Consumer Behavior**
- **How Alcohol is Affected Today**
- **Meeting the Needs of the Moment in Cider**

Today's Trends in Beverage

Big Picture Consumer Trends from 2025



Enduring Price Sensitivity

Many consumers globally still feel financially unsteady, leading to increased price sensitivity.

- Often prioritize value over brand, seeking products that clearly communicate quality and benefits such as natural ingredients, taste, and simple production methods

Health & Moderation

Alcohol moderation continues to rise, driven by health consciousness and tighter budgets.

Growing demand for low- and no-alcohol (LNA) options, especially those that don't compromise on taste and offer added benefits (e.g., vitamins, protein)

Desire for Discovery & Experience

Novelty and discovery remain strong motivators, especially among younger consumers. Flavored and limited-edition beverages, as well as unique packaging or formats, are increasingly important

- 72% of Gen Z try new drinks monthly¹
- 65% customize beverages¹

Digital & Social Influence

Social media and digital touchpoints shape expectations, with consumers seeking visually appealing, shareable experiences and stories that resonate with their values and lifestyles.

- 40% of consumers skip Google

1. Keurig Dr Pepper, State of Beverages 2025 Trend Report; Food Business News, "Gen-Z seen disrupting beverage trends," July 2025, 2. CropInk report, cited by eMarketer 2024

Shifts Expected for 2026



Balance is In

Consumers are moving away from 'maxxing' specific nutrients like protein and fiber, opting instead for diverse, inclusive diets that celebrate broad functional wellness.



Nostalgia is New

As consumers seek stability, traditional ingredients and reliable formats—like long-life and canned packaging—are seeing a resurgence by providing a much-needed sense of control and comfort



Sensory Sensation

Shifting from gimmick to utility, multisensory food and drink will increasingly focus on practical, inclusive design for consumers looking for different experiences.

How Alcohol is Affected



Why do we hear about fewer people drinking?

Changes in consumption are most notable amongst the youngest drinkers

Fewer younger people drinking...



...and drinking less when they do



“The overall rate of drinking in the U.S. has been generally steady in recent decades, but that masks shifts by age, with older Americans having become more likely to drink and younger Americans less likely.”

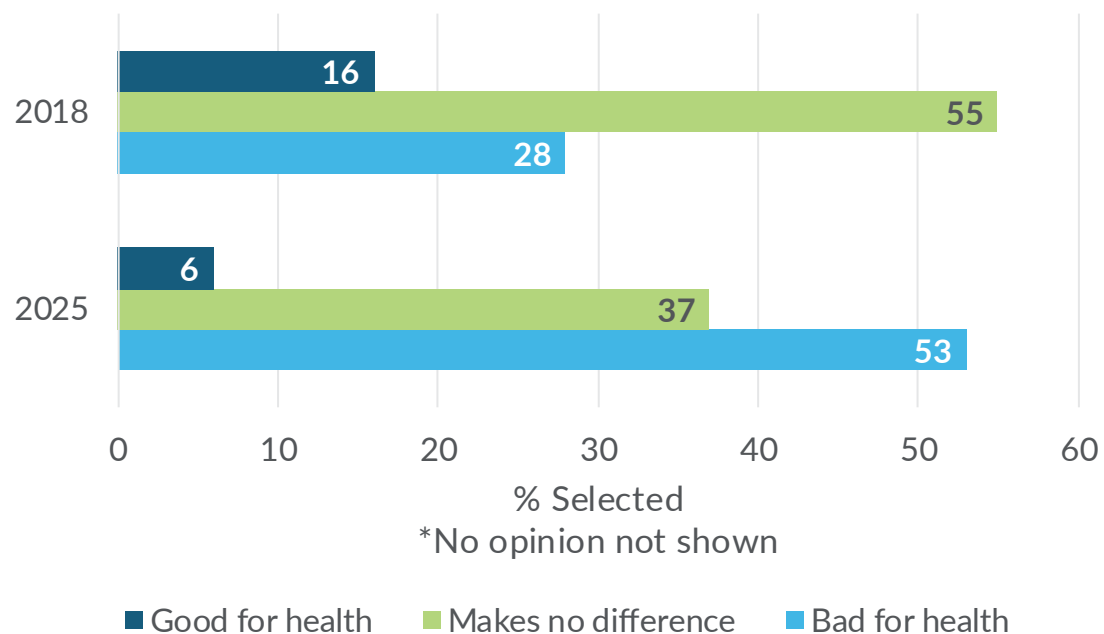


What are broader perceptions on healthfulness of drinking alcohol?

Increasingly people see alcohol consumption as bad for health

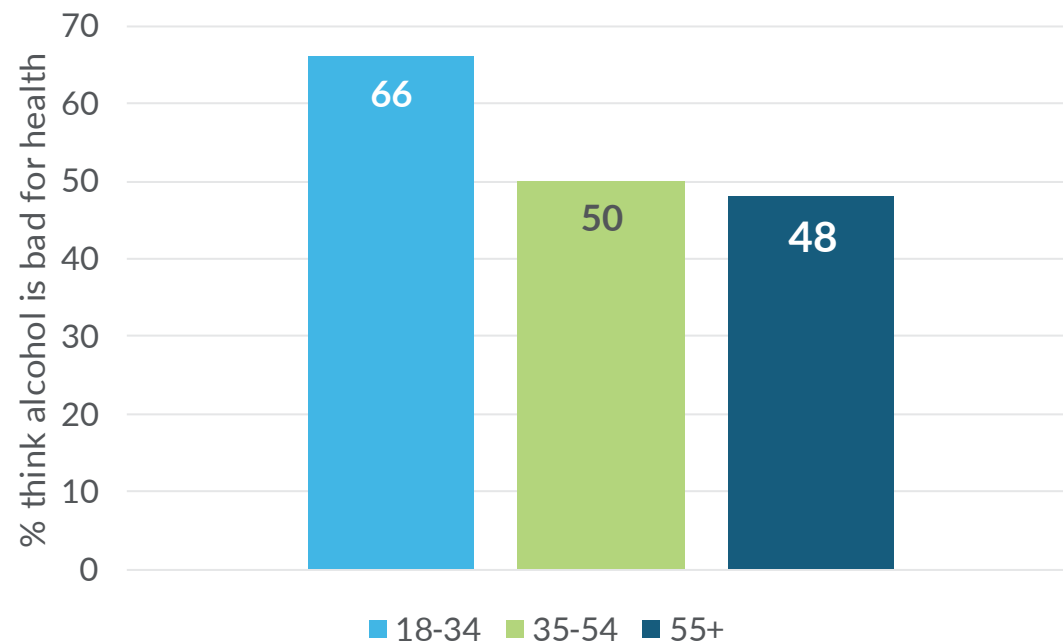
Growth in opinion alcohol is bad

53% of people from a Gallup survey believe drinking in moderation is bad for your health, up from only 28% of people as recently as 2018



Younger drinkers are driving shift

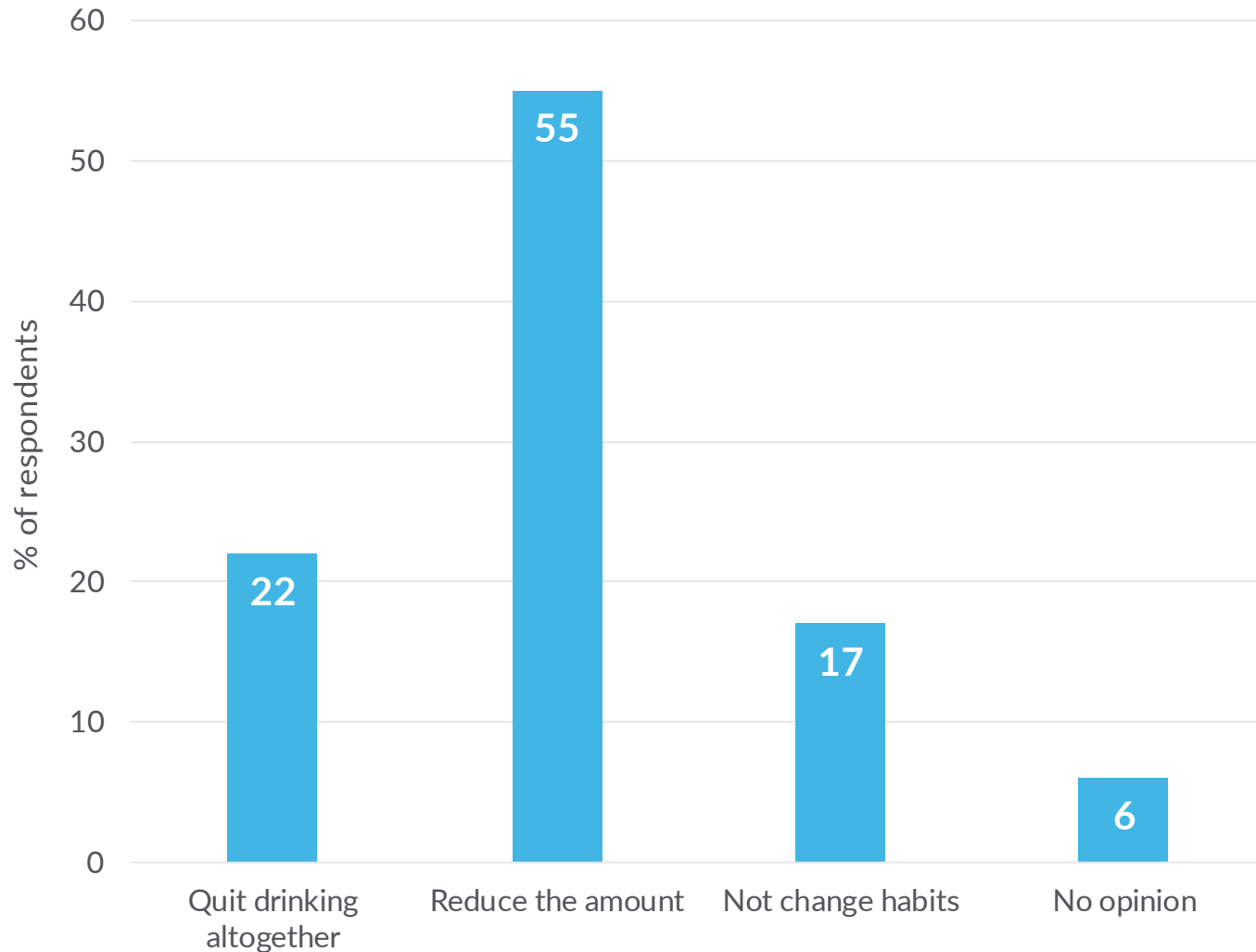
66% of 18-34 years olds from that survey believed drinking was bad for your health, substantially higher than other older cohorts from the same study



1. "Alcohol Consumption Increasingly Viewed as Unhealthy in U.S.", Gallup, 2024, 2. "U.S. Drinking Rate at New Low as Alcohol Concerns Surge", Gallup, 2025



Health Advice for Average Alcohol Drinker



How might this impact behavior?

Reduction, not elimination

Most people believe that the best health advice for someone who drinks an average amount of alcohol is to reduce their drinking rather than stopping altogether

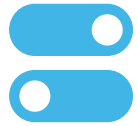
79% of those from a recent Imbibe survey of alcohol purchasers claim to be making some efforts to moderate their drinking

1. "Alcohol Consumption Increasingly Viewed as Unhealthy in U.S." Gallup, 2024, 2. 3. Imbibe Proprietary Survey, February 2025, N = 500;



Is this what's spurring the growth of "sober curious"?

Emerging behaviors around consciously reducing consumption for health



20%

Alternating Drinks

Percent of alcohol purchasers who purposely alternate³



40%

Trying to Reduce

Percent of Americans who say they are trying to drink less alcohol than the previous year¹



50%

For Health

Percent of "sober curious" self-proclaimed individuals who claim they are doing it for health²



Zebra Striping

An Emerging Behavior

A term coined out of the UK given to that alternating behavior where drinkers consciously alternate non-alc drinks into drinking occasions

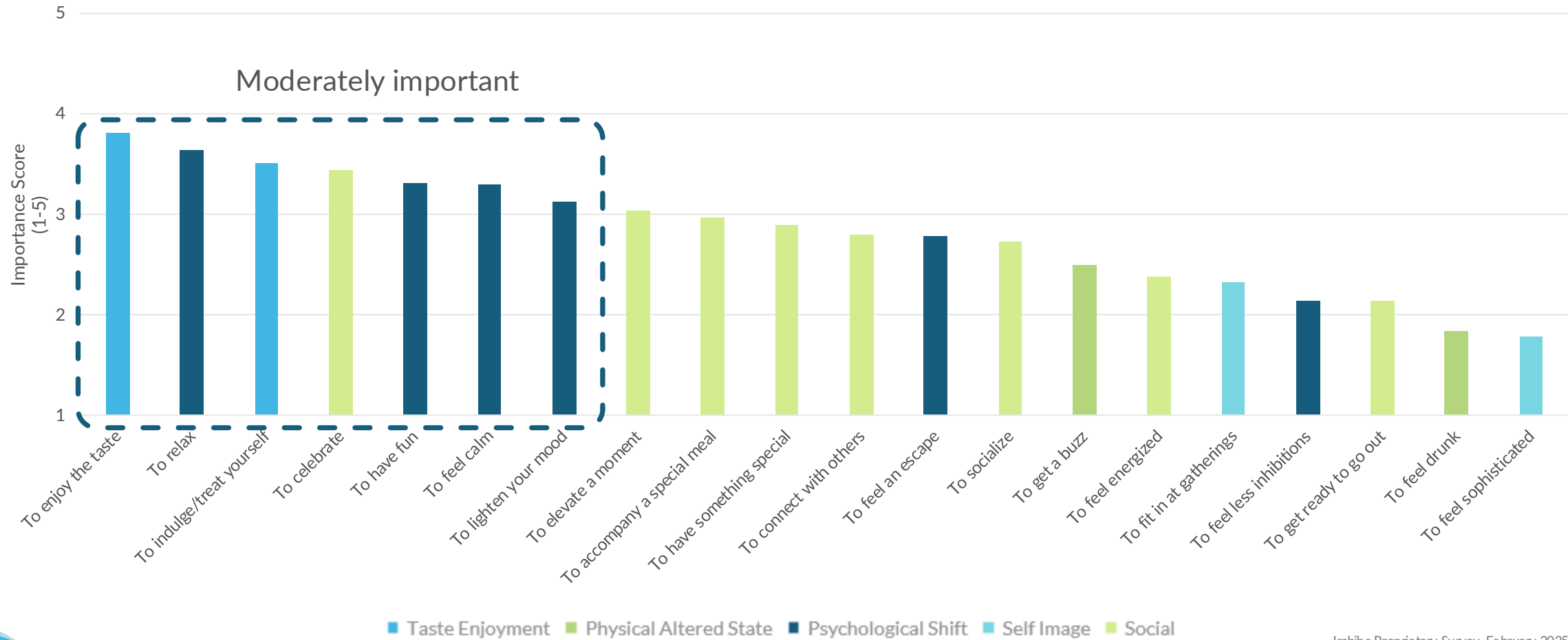
1. "As booze alternatives take off, more nonalcoholic drink makers promote health benefits as the next buzz", CNBC, 2024 ; 2. "Alcohol and No/Low Trends in 2024", The Food Institute, 2024; 3. Imbibe Proprietary Survey, February 2025, N = 500;



Importance of Drinking Jobs

The top “jobs” for alcohol are about **taste enjoyment** and psychological shifts in feeling: **taste, relaxation, indulging/treating yourself, celebration, having fun, feeling calm, and lightening mood.**

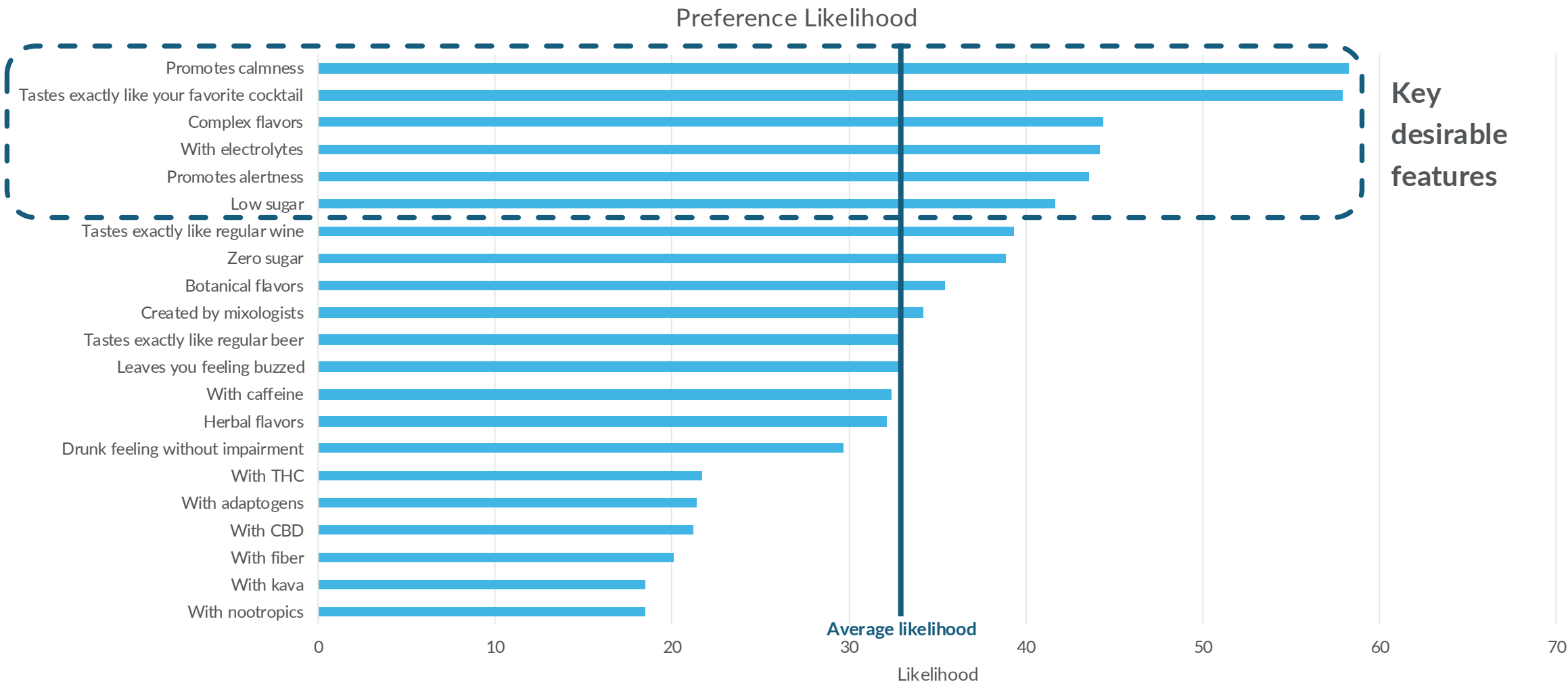
Importance Of Jobs for Alcoholic Beverages





Focus on Feelings and Complex Flavors, Not Ingredients

Calm-inducing, cocktail/complex flavors, electrolytes, and alertness top list



Thinking about what you would look for in a drink that you might swap in on an occasion that you would typically choose alcohol, decide which features or benefits you might want in that moment from a non-alcoholic beverage.

Category Trends: Cider

Considerations for Products on Shifting Consumer Habits



Zero-Proofing

Your favorite drinks, minus the alcohol (or even lower alcohol)



Flavor Inspiration

Your favorite complex, bold, or alcohol-inspired flavors, lifted into a different application.



Experiential Drinking

The feelings you get from alcohol (or another feeling, something experiential), caused by something that isn't alcohol

Flavor Demands in Beer and Cider

Seasonal and limited-edition beers appeal to consumers seeking novel flavors

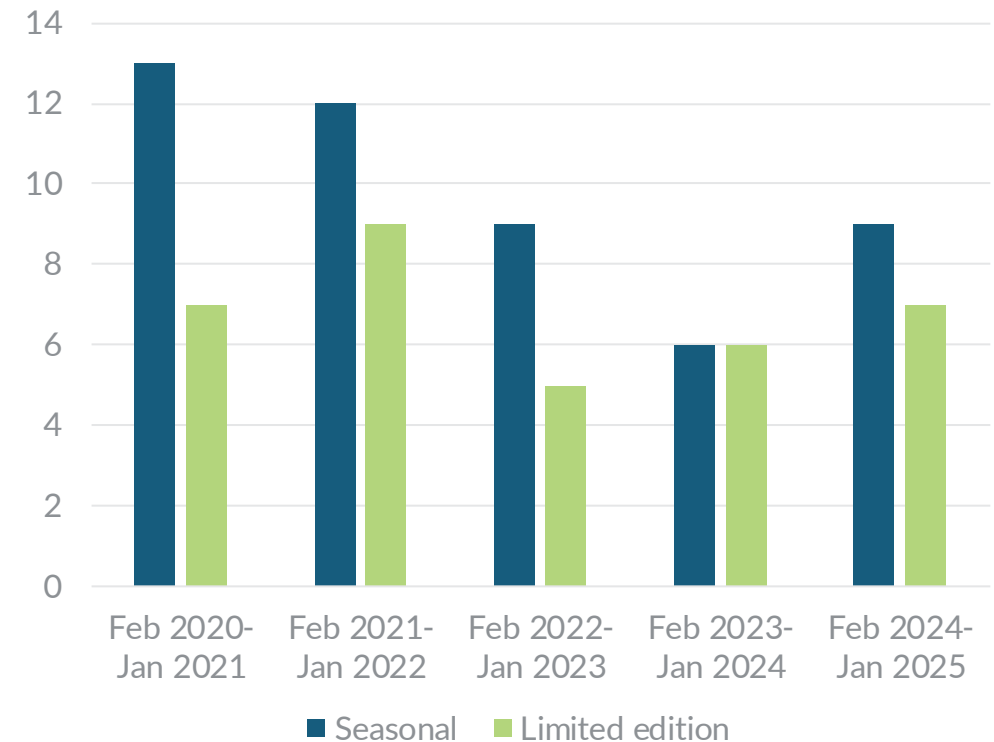
Seasonal and limited edition

- 33% of 22-34 year old beer consumers in the US say they like to buy seasonal and limited-edition offerings

Trend Opportunity: Flavor Diversification

- Moving beyond traditional apple to complex, bold profiles.
- Exotic fruits (mango, guava, hibiscus blends)
- Botanical additions (elderflower, ginger, lavender)
- "Swicy" profiles (mango habanero, guava jalapeño)
- Dark berry blends (1/3 of cider market)
- Heritage apple varieties (15% YoY growth)
- Co-ferments with other fruits (raspberry, quince)

North America: beer launches, by share of seasonal and limited edition claim, 2020-25



Was seeing a decline, but recently experienced an uptick – representing Gen Z's growing interest



Hard Cider: Where Opportunity Lies

Key Takeaways for Innovation

1. Dial Up Value & Authenticity:

Clearly communicate quality, natural ingredients, and craft credentials to meet price-sensitive consumers' value expectations.

2. Innovate with Flavors & Formats:

Offer limited-edition, seasonal, or collaborative flavors.

3. Create Experiences Beyond the Ordinary:

Design multisensory drinking occasions powered by distinctive flavor systems—textural layers and aroma-driven offerings—co-created with local food partners and brought to life through interactive tastings that immerse consumers' senses and deepen brand connection.

4. Expand Low/No & Functional Offerings:

Develop low/no-alcohol ciders with functional benefits (e.g., added vitamins, hydration) to tap into moderation and wellness trends

5. Leverage Digital & Social Storytelling:

Use social media to share your brand's unique story, highlight sustainability or community initiatives, and create visually engaging, shareable content.



Thank you!

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