



AMERICAN
CIDER
ASSOCIATION

National Cider Month - 2025 Retail + Distributor Programming

PRESENTED BY:

Schilling Cider: Eric Phillips, CCO, Rachel Thomas, CMO, Marina Sumrada,
Brand Partnerships

Whole Foods Market: Mary Guiver, Global Principal Buyer

Hayden Beverage Company: Andy Mitchell, President

HopCat: Justin Pollock, Beverage Director



AGENDA

- 1 National Cider Month Overview
- 2 Retailer & Distributor Panel
- 3 Interactive Q&A
- 4 How to Participate in NCM



20



25

National
CIDER MONTH

OVERVIEW



National Cider Month celebrates cider-making traditions, diverse flavors, and the cideries behind them. Originally part of *National Apple Month* in the PNW, it evolved into *National Cider Month* to expand nationwide. Since its inception, it has focused on increasing category awareness and collaborating with local and national retailers. With support from industry partners, media, and cider guilds across the U.S., its reach has grown more than ever in 2024.



Interactive Q & A

Text us a question →
(253) 269-6105



2024 PARTICIPATING CIDERIES

3 Daughters Brewing
3 Dog Cider & Brewstillery
After The Fall Cider
Almar Orchards
Alpenfire Cider
Angry Orchard Cider House
ANXO Cider
Apple Outlaw
Apple Valley Cider Company
Artifact Cider Project
Ash & Elm Cider Co.
Atlanta Hard Cider Co. & Distillery
Atomic Dog Hard Cider, LLC
Austin Eastciders
AVID Cider Co
Bauman's Cider
Big Hill Ciderworks
Bivouac Ciderworks
Bizzell Bluff Farm
Black Apple
Blake's Hard Cider
Blossom Barn Cidery
Botanist & Barrel
Brick River Cider Co
Brooklyn Cider House

Brothers Ridge Cider
Channel Marker Cider
Cider Corps
Citizen Cider
City Orchard
Cockrell Cider Farm
Colorado Cider Company
Coronado Brewing Co.
Country Boy Brewing
Crispin Cider
Diskin Cider
Downeast Cider
Dragon's Head Cider
Dressler Estate
ERIS Brewery and Cider House
Excursion Ciders
Farmstead Cider
Fierce County Cider
Finnriver Farm & Cidery
Freedom's Edge Cider
Glacial Till Vineyard
Graft Cider
Hale & True Cider Co.
Hawk Knob
Haykin Family Cider
Heartland Ciderworks

Highpoint Cider
Honest Abe Cidery
Hudson North Cider Co.
Incline Cider Company
Island Orchard Cider
JK's Farmhouse Ciders
Kingfish Cider
Kristof Farms
Lassen Traditional Cider
Legend Cider Co
Little Apple Cidery
Little Switzerland Orchard & Winery
Lockhorn Hard Cider
Locust Cider
Lost Lake Cider
Mac's Creek Winery & Brewery
Manoff Market Cidery
Meriwether Cider
Minneapolis Cider Company
Mount Diablo Cider Company
Nine Pin Cider
Noble Cider
Northman Cider Co.
Northwood Cider Co.
Oddstock Cider Co.
Ore Creek Craft Cider

Outback Orchard
Paha Cider
Painted Turtle Hard Cider
Paradise Ciders
Ploughman Cider
Portland Cider Co.
Potter's Craft Cider
Presque Isle Farm Cider and Taproom
Pux Cider
Queen Orchard
Raging Cider & Mead Co
Red Clay Brewing Company
Red Shedman Farm Brewery
Right Bee Cider
Sage Bird Ciderworks
Saro Cider
Schilling Cider
Scion Cider
Seattle Cider Co
Serpentine Cider
Shacksbury Cider
Sincere Cider
Snow Capped Cider
Snowdrift Cider Co.
SoCal Vibes Co
Squabble State Hard Cider & Spirits

Starcut Ciders
Stem Cider
Stormalong Cider
Stowe Cider
Superstition Meadery
Tallgrass Cider
Tandem Ciders
Tieton Cider Works
Townline Ciderworks
Tractor Brewing Company
Two Story Chimney Ciderworks
Uncle John's Hard Cider
UrbanTree Cidery
Vander Mill Hard Cider
Vermont Cider Lab
Waves Cider Co
Western Cider
White Crow Cider Company
Wild State Cider
WildCraft Cider Works, Inc
Wise Bird Cider
Wölffer Estate Vineyard
Woodchuck Cidery
Wool and Vine
Yankee Cider Company

There are currently 130+ cideries featured on the National Cider Month website today (up from just ~60 at the end of 2023) and we aim to continue growing.

KEY BENEFITS OF NCM



Cideries

Marketing & Exposure

Sales & Growth

Operational Benefits

Distributors

Portfolio Enhancement

Sales/Marketing Development

Competitive Advantage

Retailers

Sales Growth

Customer Engagement

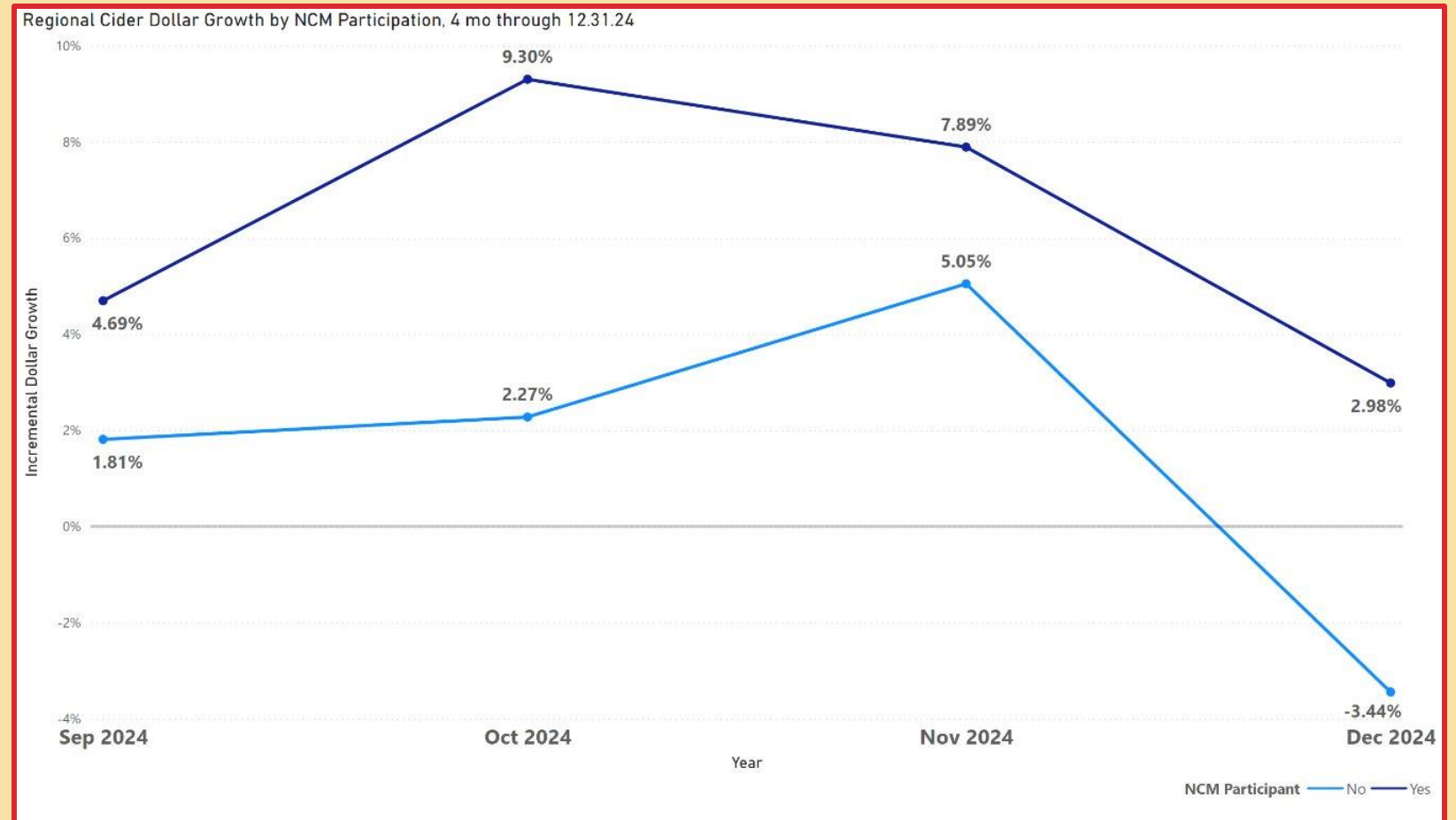
Category Development

NCM DATA (1)

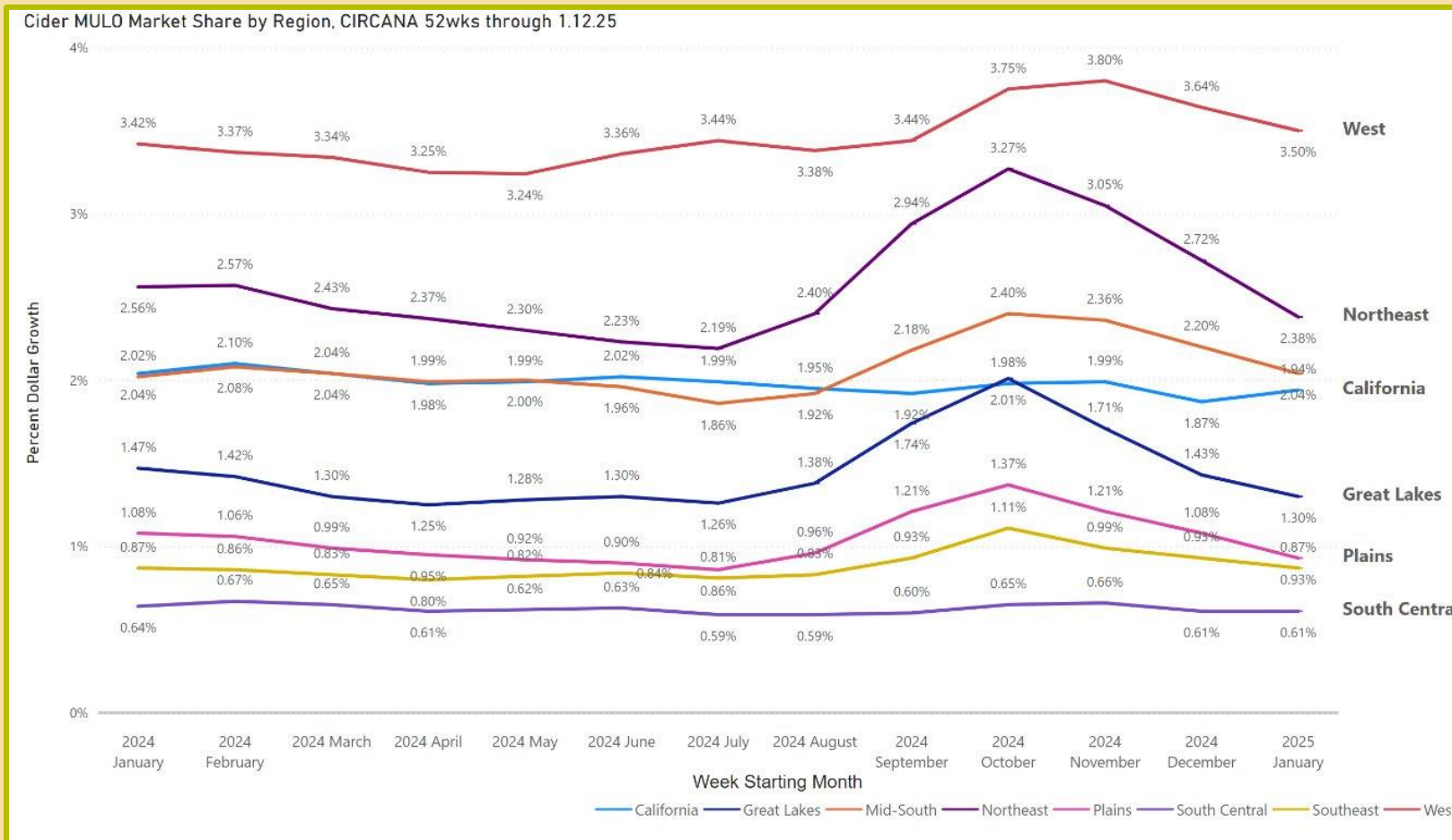


Regional cider dollar growth of Active NCM cideries vs Inactive cideries

Active NCM participants saw a 5% increase in IRI Sales during the Month of October relative to a .4% increase of nonparticipant brands



NCM DATA (2)



Cider MULO Market Share by Region, CIRCANA 52wks

Most regions saw an increase in total cider share during the month of October

No significant retailer participation in National Cider Month in CA or the South, so share remained flat

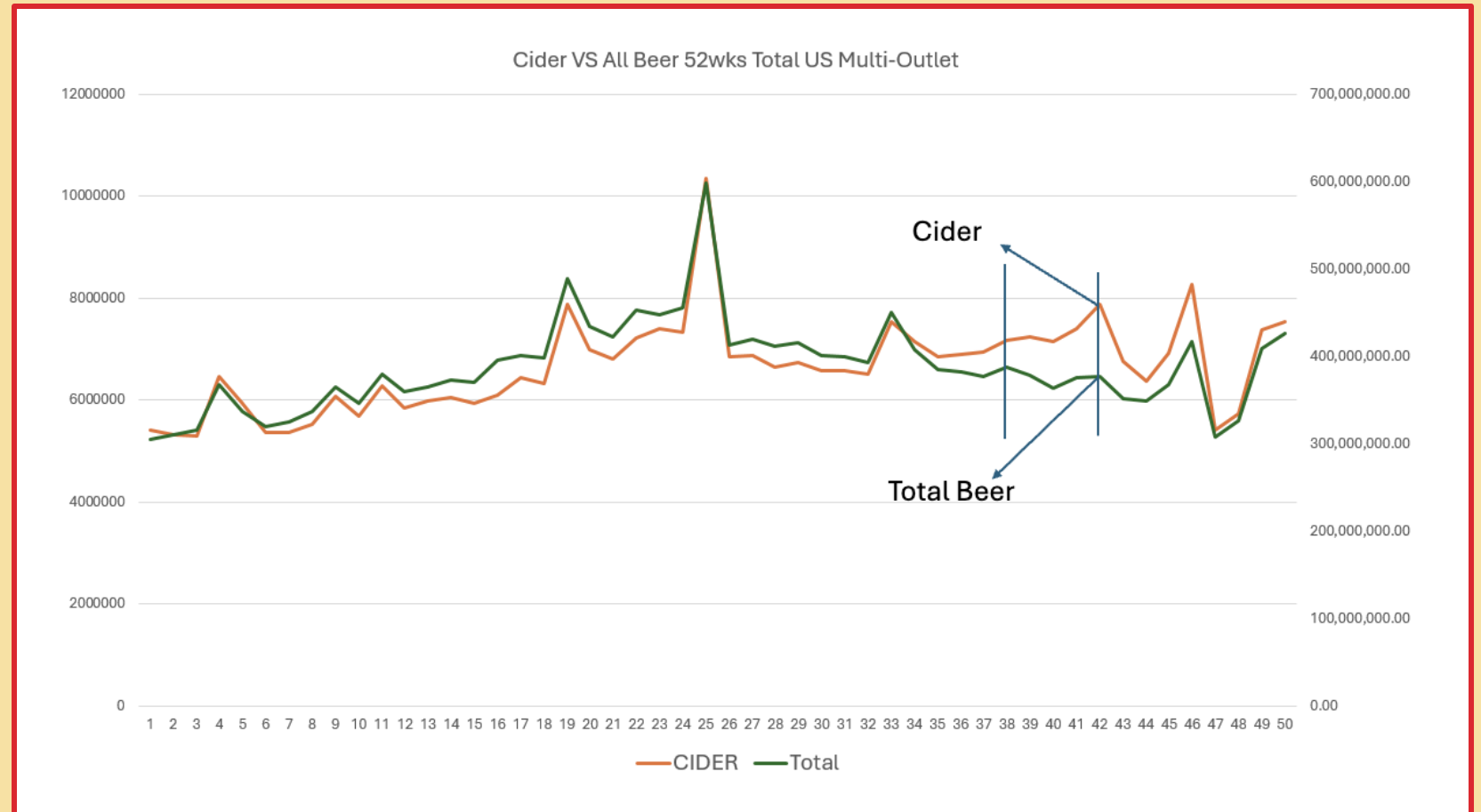
NCM DATA (3)



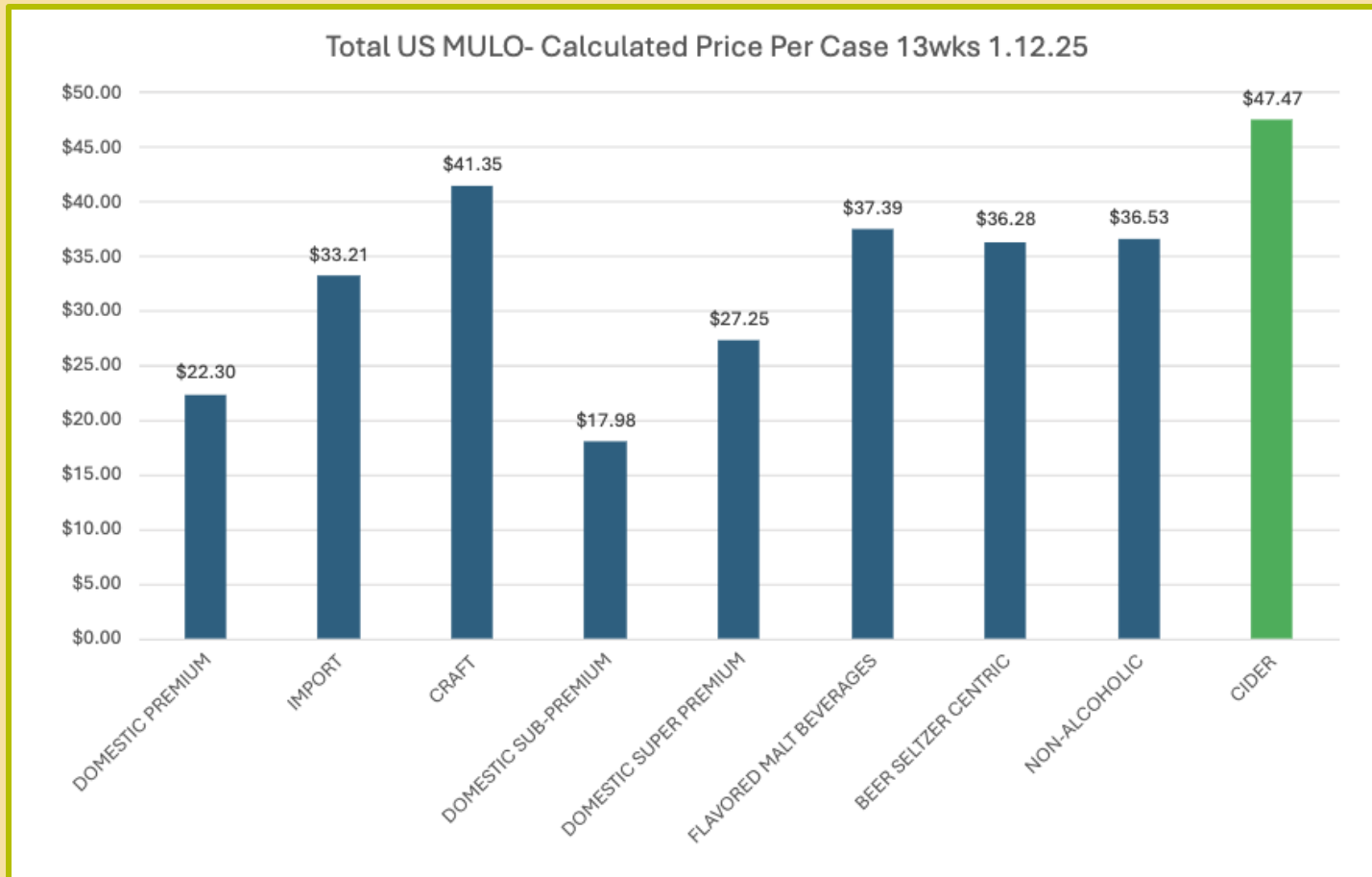
National
CIDER MONTH

Cider VS All Beer 52wks
Total US Multi-Outlet

While beer was declining, cider had a steady rise and continued over-indexing comparatively



NCM DATA (4)

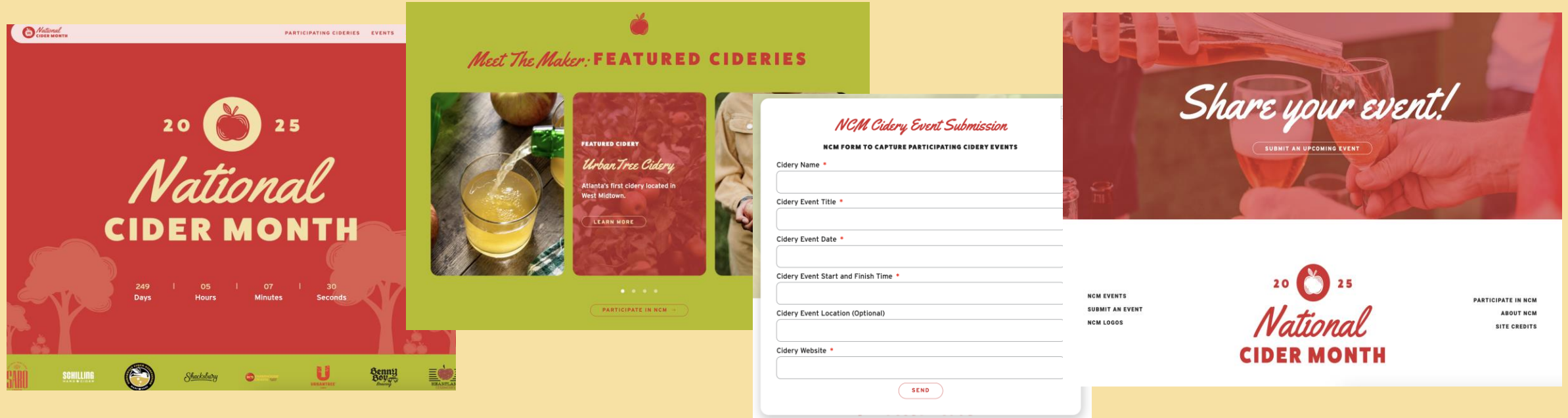


Total US MULO - Price
Per Case 13wks

Cider produces \$47.47 per case
(which is \$6.11 more per
case than Craft, the next highest)

Opportunity to increase revenue
18% with Cider

WEBSITE



The National Cider Month website features all participating cideries as well as the events and samplings that are happening across the country throughout the month. It launched last September and is active year-round, allowing new cideries to fill out participation forms and returning cideries to submit events & download the NCM logo suite.

ASSETS



FONT & COLOR

FONT

Yellowtail Regular
LOGO FONT / USE IN SCENTENCE CASE FOR 1-2 WORD HEADERS OR SMALL SCIENCE CAPTIONS.

FAT FRANK HEAVY

LOGO FONT / USE IN ALL CAPS FOR SUB HEADERS OR SHORT CAPTIONS.

INTERSTATE FAMILY

ADDITIONAL BRAND SUPPORT FONT / SMALL PRINT & BODY COPY

EXAMPLE BODY COPY:
Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed diam nonummy nibh euismod tincidunt ut laoreet dolore magna aliquam erat volutpat. Ut enim ad minim veniam, quis nostrud exercitation ullamcorper suscipit lobortis nisl ut aliquip ex ea commodo consequat. Duis aute murem inure dolor in hendrerit in vulputate velit esse molestie consequat, vel illum dolore eu feugiat nulla facilisis at vero eros et accumsan et

COLORS



LOGO SYSTEM



MASTER



HORIZONTAL



STACK



TYPE ONLY



BASIC BADGE



APPLE BADGE



PARTICIPANT BADGE



LOCAL BADGE



APPLE ICON

Cider. WHERE TRADITION MEETS INNOVATION

TRADITION TAGLINE

Discover the World of Cider

DISCOVER TAGLINE

ASSET LIBRARY CONT.



There's a comprehensive brand guide, complete with a full logo and asset suite, available for download directly on the NCM website for all participating cideries. For more info on this, please reach out via email to cideries@nationalcidermonth.com

MARKETING + POS



Throughout October, we recommend tapping into a variety of marketing efforts (both in-store and online) to fully capitalize on the momentum of National Cider Month.

DEMOS + SAMPLINGS

MERCHANDISING + DISPLAYS

SHOPPER MARKETING

DIGITAL / SOCIAL MEDIA



HOW CAN A CIDERY SIGN UP TO PARTICIPATE IN NCM 2025?

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HOW DOES ONE GET IN TOUCH WITH THE NCM TEAM IN GENERAL?

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HOW CAN WE SPREAD THE WORD ABOUT NCM?

- Mention NCM in your newsletters, post about it on social media, plan events and pairing dinners throughout October, host in-store demos, offer an NCM promotion, or if you’re feeling crafty, maybe even create a special cider in honor of the occasion - this month is all about celebrating cider/cider making, and every little bit of buy-in helps amplify the industry as a whole!



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CIDER MONTH

Interactive Q & A

Text us a question →
(253) 269-6105



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CIDER MONTH

THANK YOU!

Stop by the NCM table for more information today,
or contact hello@nationalcidermonth.com for email assistance.



Interactive Q & A

Text us a question →
(253) 269-6105

A QR code is located in the top right corner of the slide, enclosed in a green border. It is intended for users to scan and access an interactive Q & A session.

Retail + Distributor Programming

Mary Guiver, Global Principal Buyer - Whole Foods Market:

Andy Mitchell, President - Hayden Beverage Company:

Justin Pollock, Beverage Director - HopCat:

Moderated by Eric Phillips, CCO - Schilling Cider

SESSION 2



AMERICAN
CIDER
ASSOCIATION

National Cider Month – Storytelling with Data + Media

PRESENTED BY:

3 Tier Beverages: Devon Hevener,
Draftline Technologies: Jennifer Hauke, President
Brewbound: Zoe Licata,
Beer Business Daily: Jordan Driggers, Senior Beer Reporter



AGENDA

- 1 Introduction
- 2 Data Deep Dive
- 3 Media Insights & How to Build Media Relationships
- 4 How to Participate in NCM
- 5 Interactive Q&A



National Cider Month Review

We are on a **Mission**

We are an analytics and growth consulting firm on a mission to make data-based decisions accessible to all.

Our industry experts utilize intricate data sets to craft impactful narratives and facilitate effective decision-making to complement our partners' offerings.



NIQ



What is NIQ Syndicated Data?

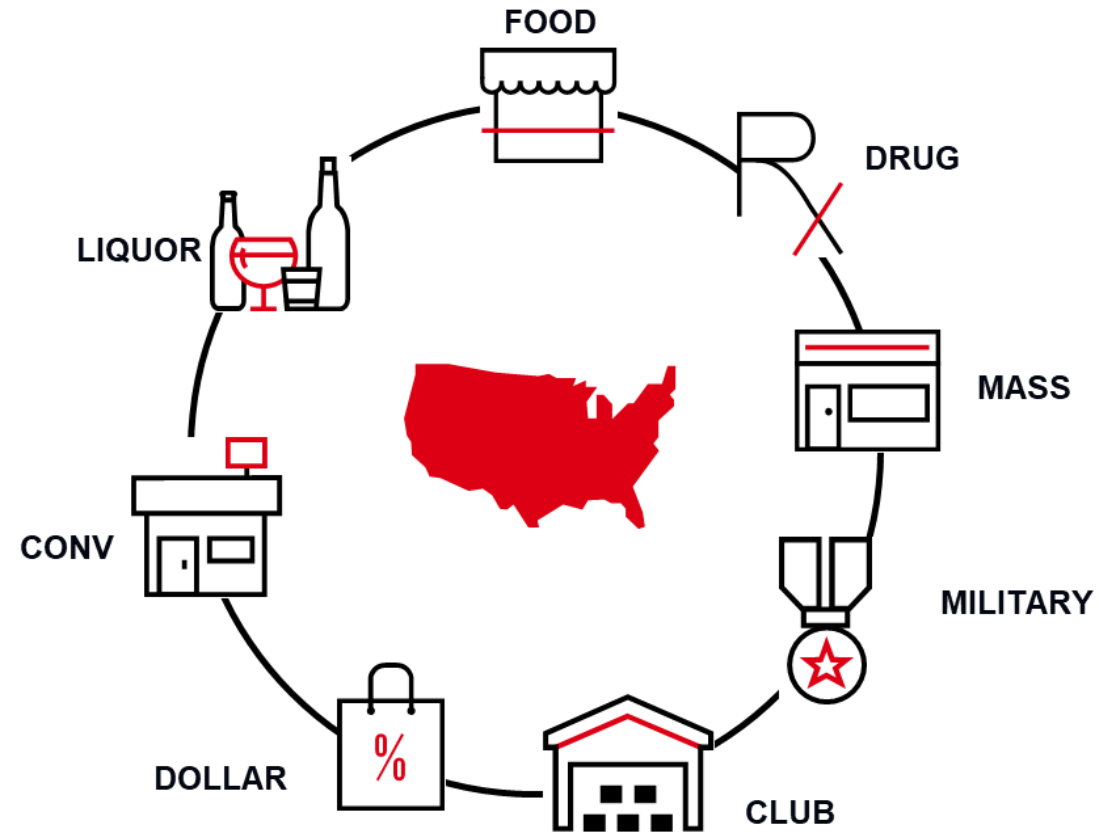
Nielsen IQ delivers syndicated data which pools together data from **many retailers** to create a picture of total market

Data is collected weekly at the **UPC level** from cooperating retailers, **as scanned in each store**

Tells us what happened in the **STORE**, and **pull through performance** as opposed to “push”

KEY BENEFITS:

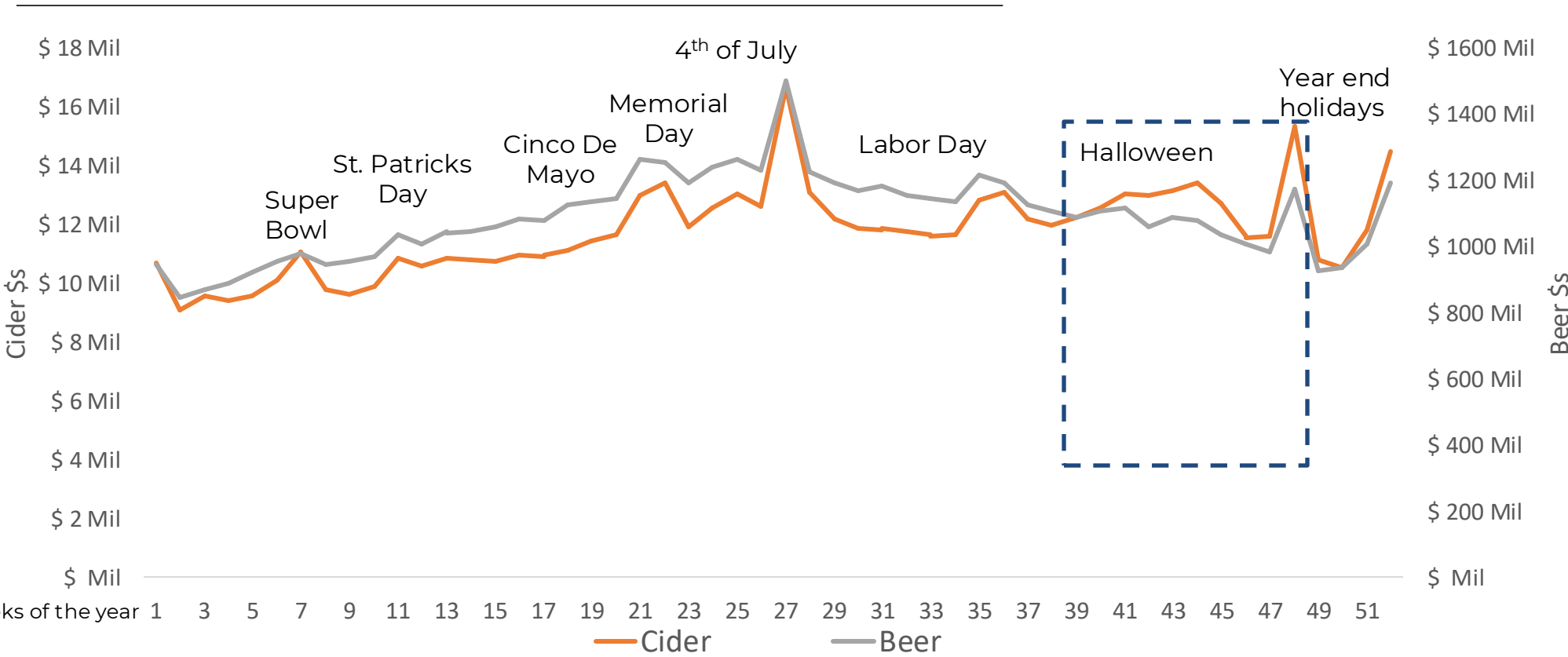
- Track **dollar and volume performance** of brands and UPCs that are outside of our portfolio (total market view)
- View pricing, distribution as well as promotional metrics
- **Unbiased data!**



Cider has similar seasonal peaks to Beer, but has a clear advantage in the Fall

Total Beer/FMB/Cider vs. Cider weekly dollars

NielsenIQ off-premise channels



2024

Off-premise Cider up

-2.1%

vs year ago

Off-premise Beer up

-0.7%

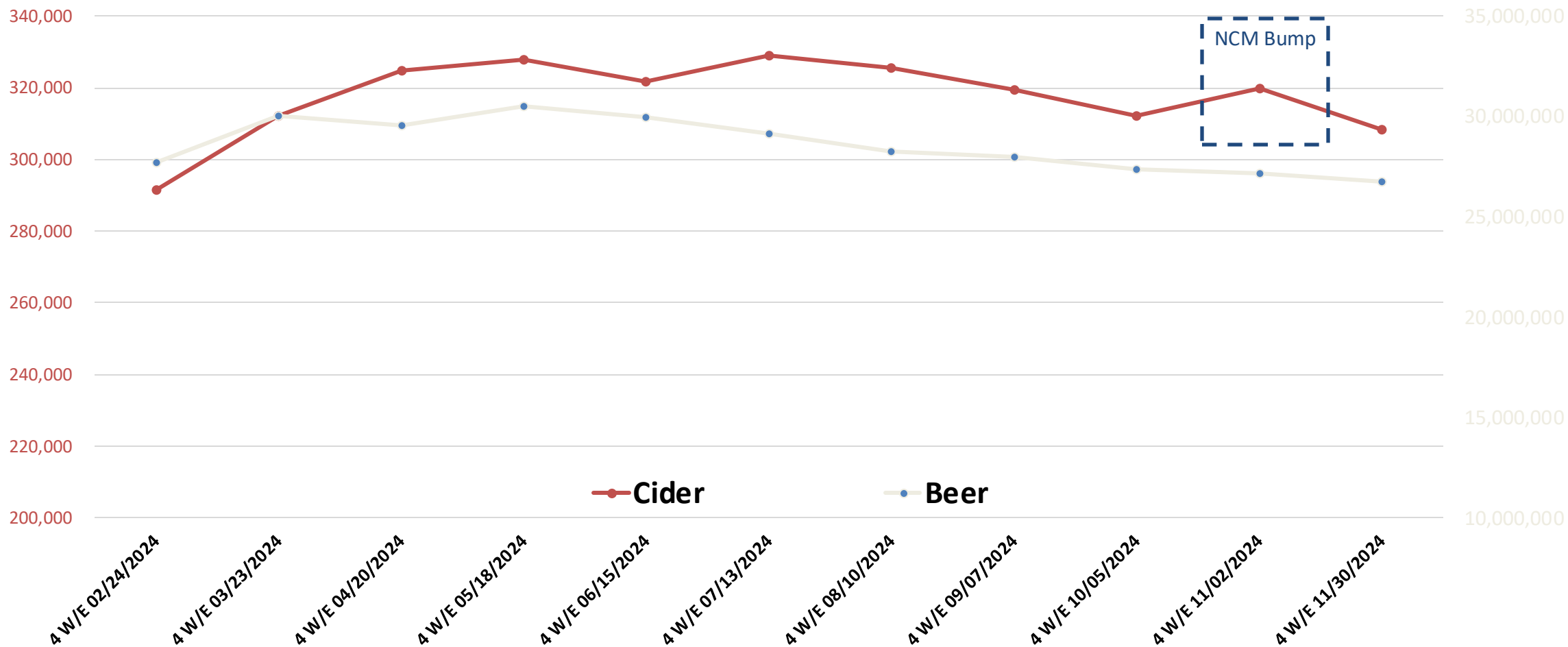
vs year ago

Source: Nielsen IQ Total US xAOC + Liquor + Convenience Channels L52W Dec 28, 2024



Cider sees elevated sales in summer and fall months in the On Premise

Volume Sales 288oz – Cider vs Total Beer

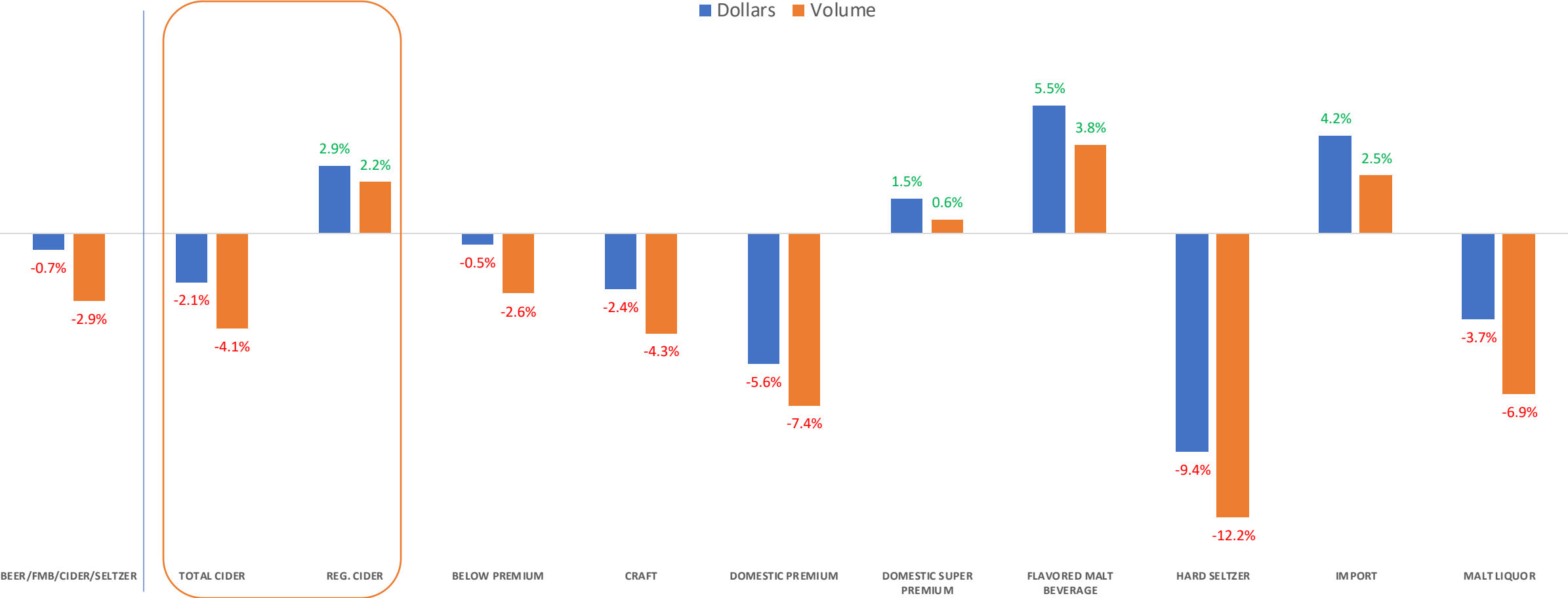


Total Beer = Total Beer/ FMB/Gder
 Source: CGA by NIQ OPM data – Total US, megacategory, subsegment, volume, 288OZ EQ, 4 w/e 02/24/2025 to 11/30/2024



Regional Cider is among the few bright spots in an otherwise declining Beer category

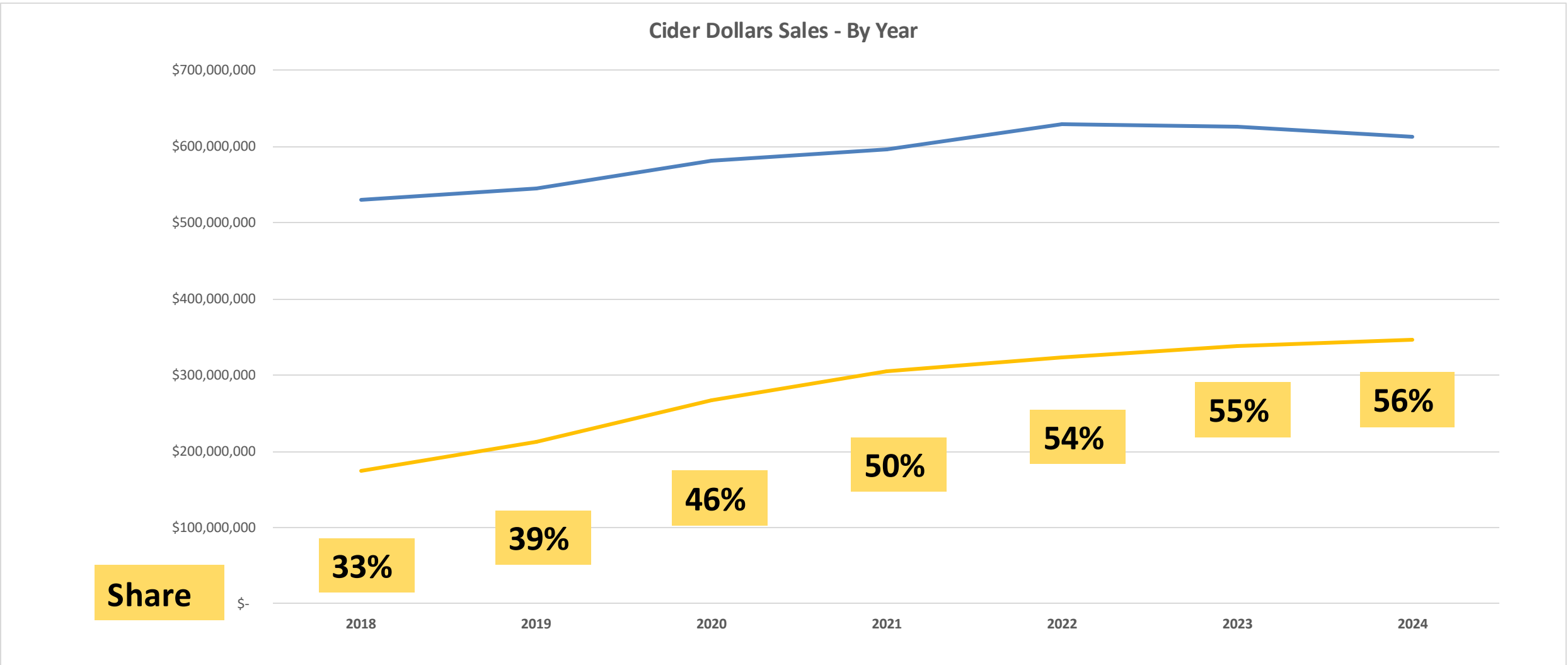
Volume Percent Change vs. YA






Source: Nielsen IQ Total US xAOC + Liquor + Convenience Channels L52W Dec 28, 2024



Regional Cider brands continue to see growth



Regional Cider brands continue to be the preferred choice On Premise too

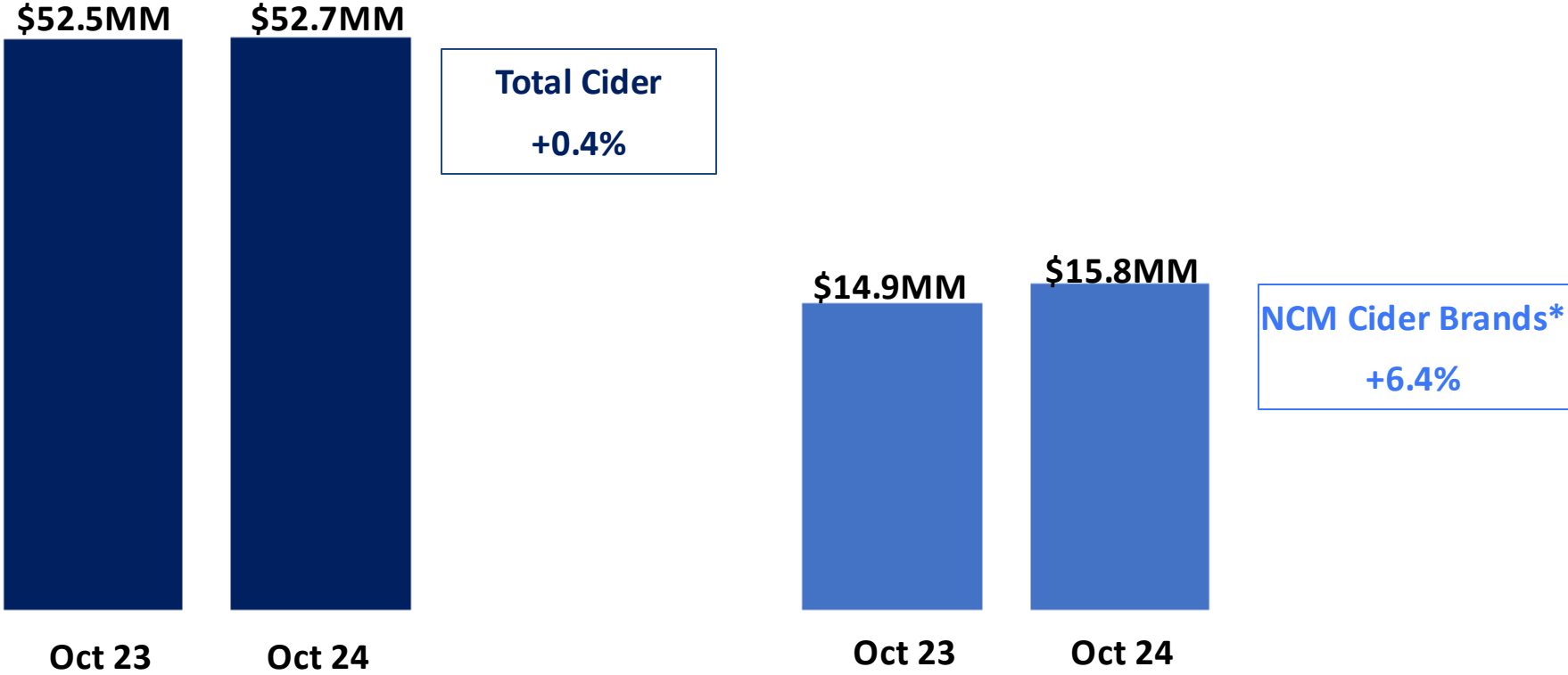
	Cider	Regional Cider Brands*	National Cider Brands*
288OZ EQ Share of Total Beer/Cider	1.1%	52.5%	47.5%
288OZ EQ Share pp chg vs YA	0.0pp	+1.5pp	-1.5pp
			
288OZ EQ	4.1M	2.1M	1.9M
288OZ EQ % chg vs YA	-1.2%	+1.6%	-4.2%

*This is the minimum distribution for these aggregated product levels, as we pull through the most widely distributed manufacturer/flavor distribution for custom groups.
 Total Beer = Total Beer/FMB/Cider
 Source: CGA by NIQ OPM data – Total US, megacategory, subsegment, volume, 288OZ EQ, rolling 52 w/e 11/30/2024 vs YA



National Cider month elevated participating brands, as well as the entire Cider category

National Cider Month 2024
Total US xAOC+Liq+Conv

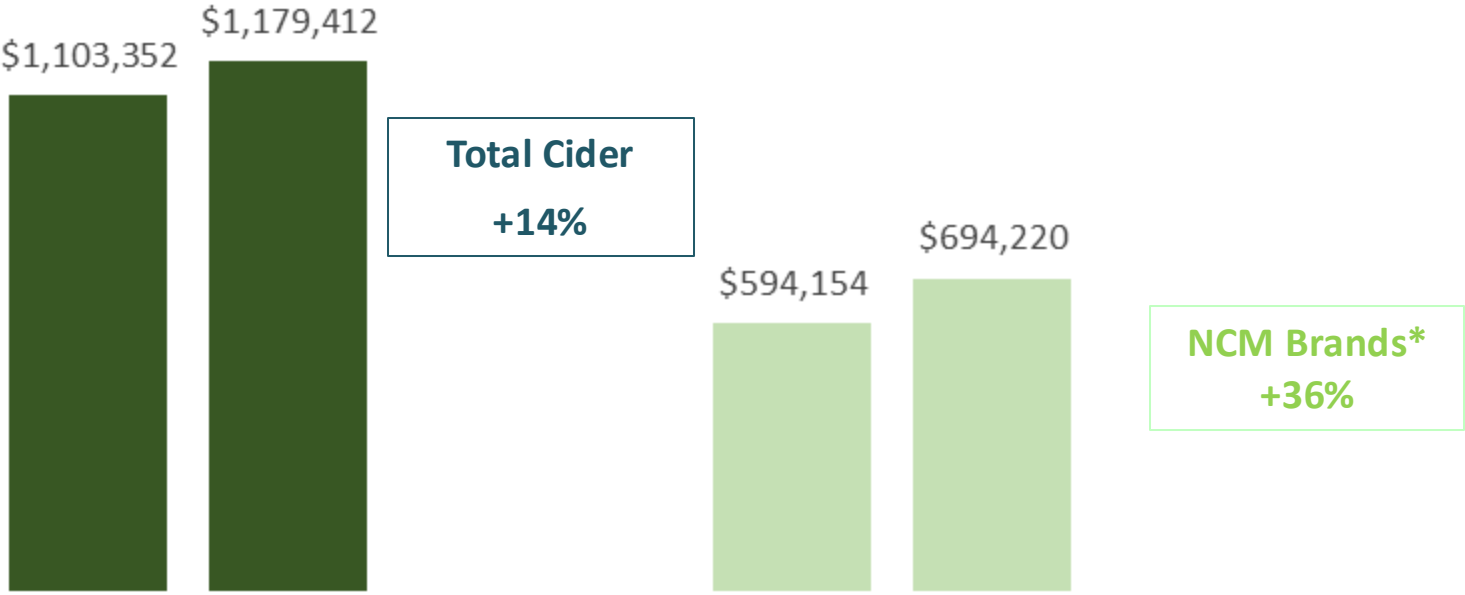


Source: Nielsen IQ Total US xAOC + Liquor + Convenience Channels 4 weeks ending 11/2/24 vs YA

*excludes Angry Orchard

In participating retailers, like Whole Foods, there was an even greater impact on NCM brands and the category

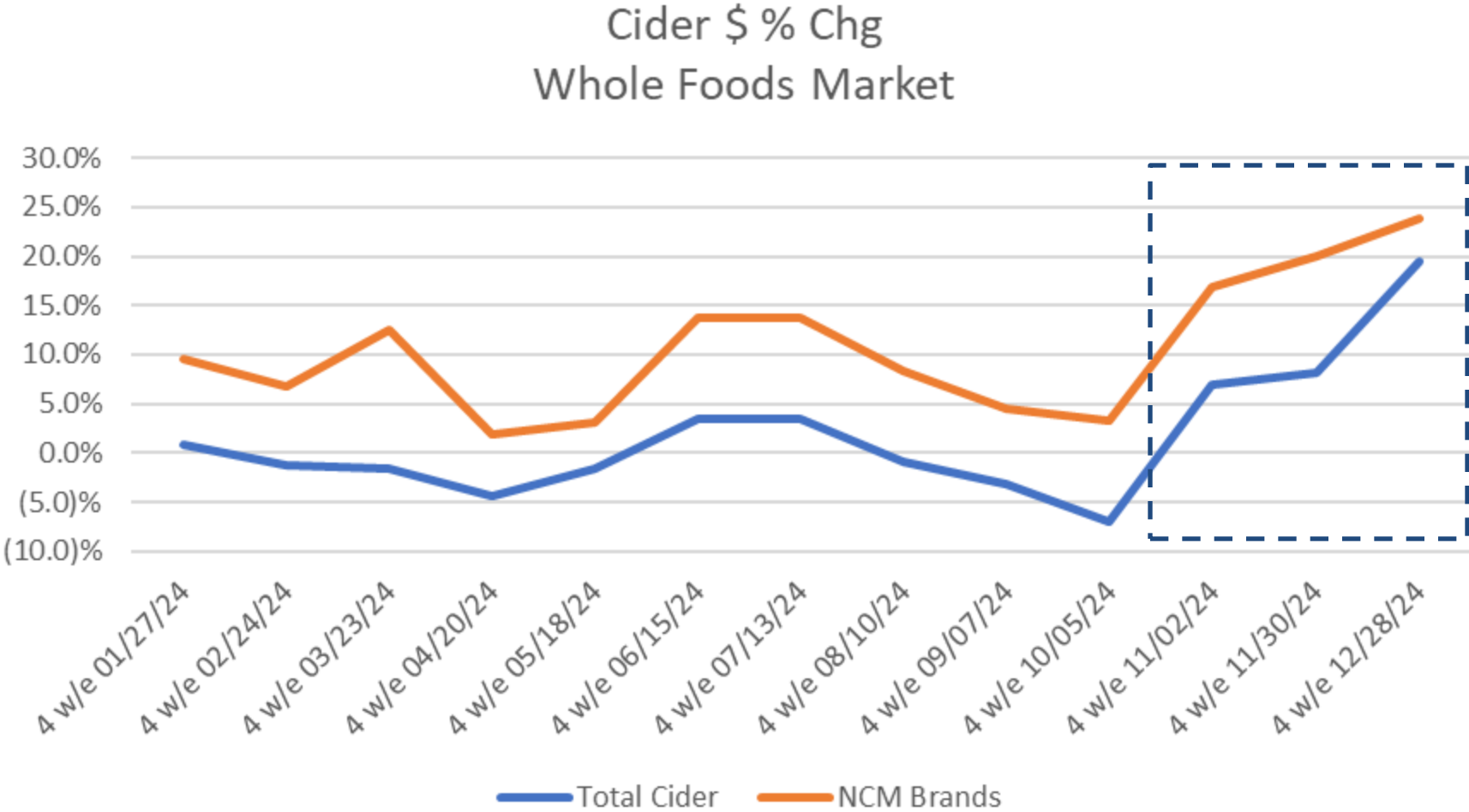
National Cider Month 2024
Whole Foods Market



Source: NielsenIQ Whole Foods Market Total TA, 4 weeks ending 11/2/24

*excludes Angry Orchard

National Cider Month helped propel the Cider category back to growth in the last quarter of the year for Whole Foods



Source: NielsenIQ Whole Foods Market Total TA, 4 weeks ending 11/2/24

*excludes Angry Orchard

Thank you!



Opportunities for Cider on 1,500,000 Draft Lines





Jennifer Hauke

Founder, DraftLine Technologies



KNOWLEDGE-BASED PUBLICATION

BEER BUSINESS DAILY

NEWS. NUMBERS. MOTIVE.

January 10, 2023

20th Annual Beer Summit: Some Sound Bites By the Numbers

Dear Client:

It's going to take days to unpack all of the content from our 20th annual Beer Summit at The Breakers in Palm Beach, Florida. But here are a few interesting sound bites "by the numbers" that stood out to your editors:

90,000 OPEN LINES – THE TOP NATIONAL BRAND ON DRAFT. Jennifer Hauke, founder of DraftLine Technologies, which tracks more than 1 million draft lines in 40 states, revealed a shocking stat: In their own data set, the no. 1 post-COVID draft brand nationwide is open lines.

To be precise: there were 55,000 open lines (6% of the total) pre-COVID, and about 90,000, or 11% of open



2002



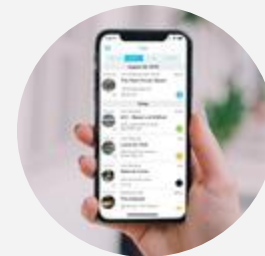
Chemicals

2016



Technician
App

2023



Draftline
Data



DRAFTLINE DATA



By The Numbers

Draftline Technician



1,500+ Technicians
(1st & 3rd Party)



40

US States

102K

On Premise
Accounts

1M

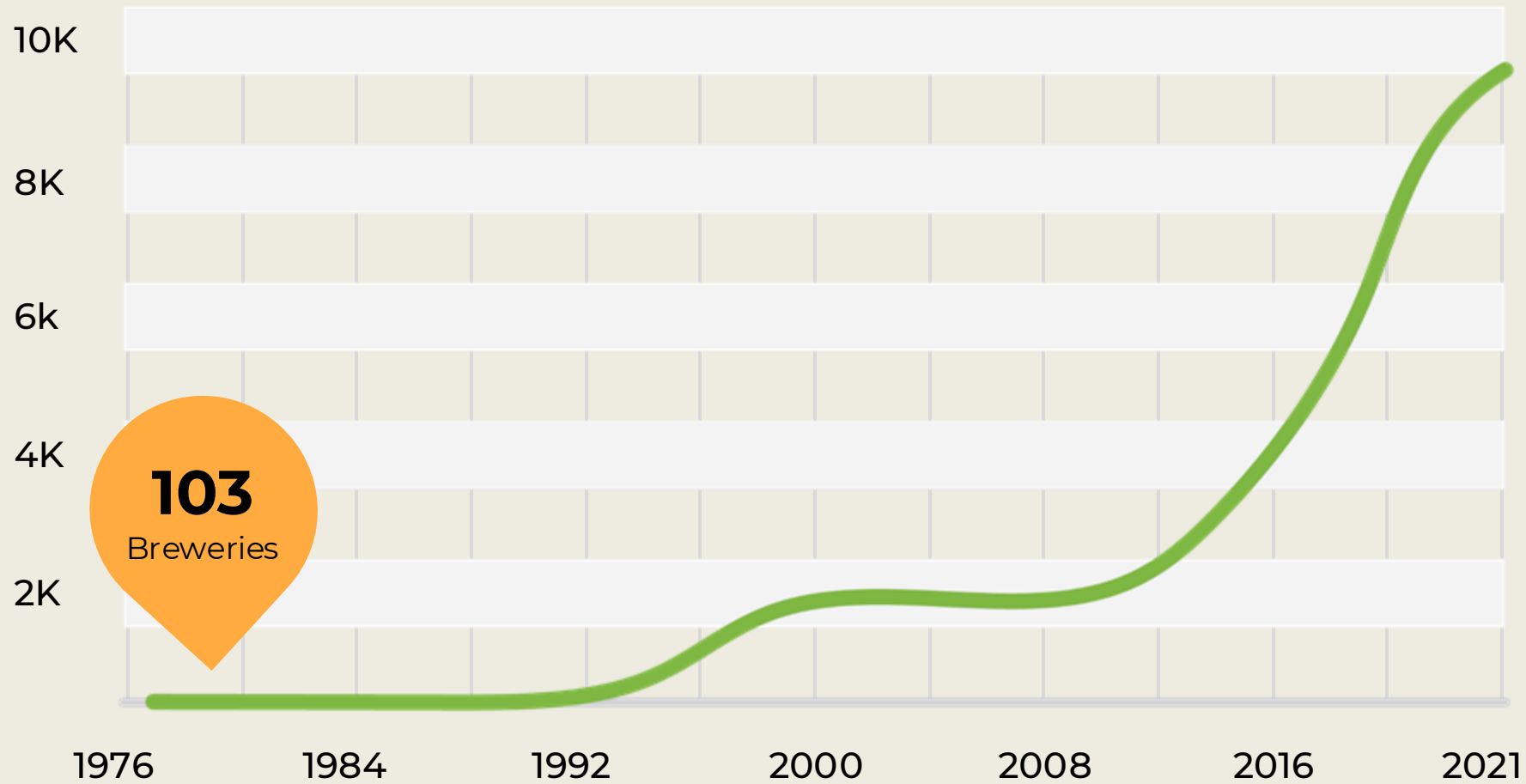
Of 1.5M Total
Lines in US



DRAFTLINE DATA

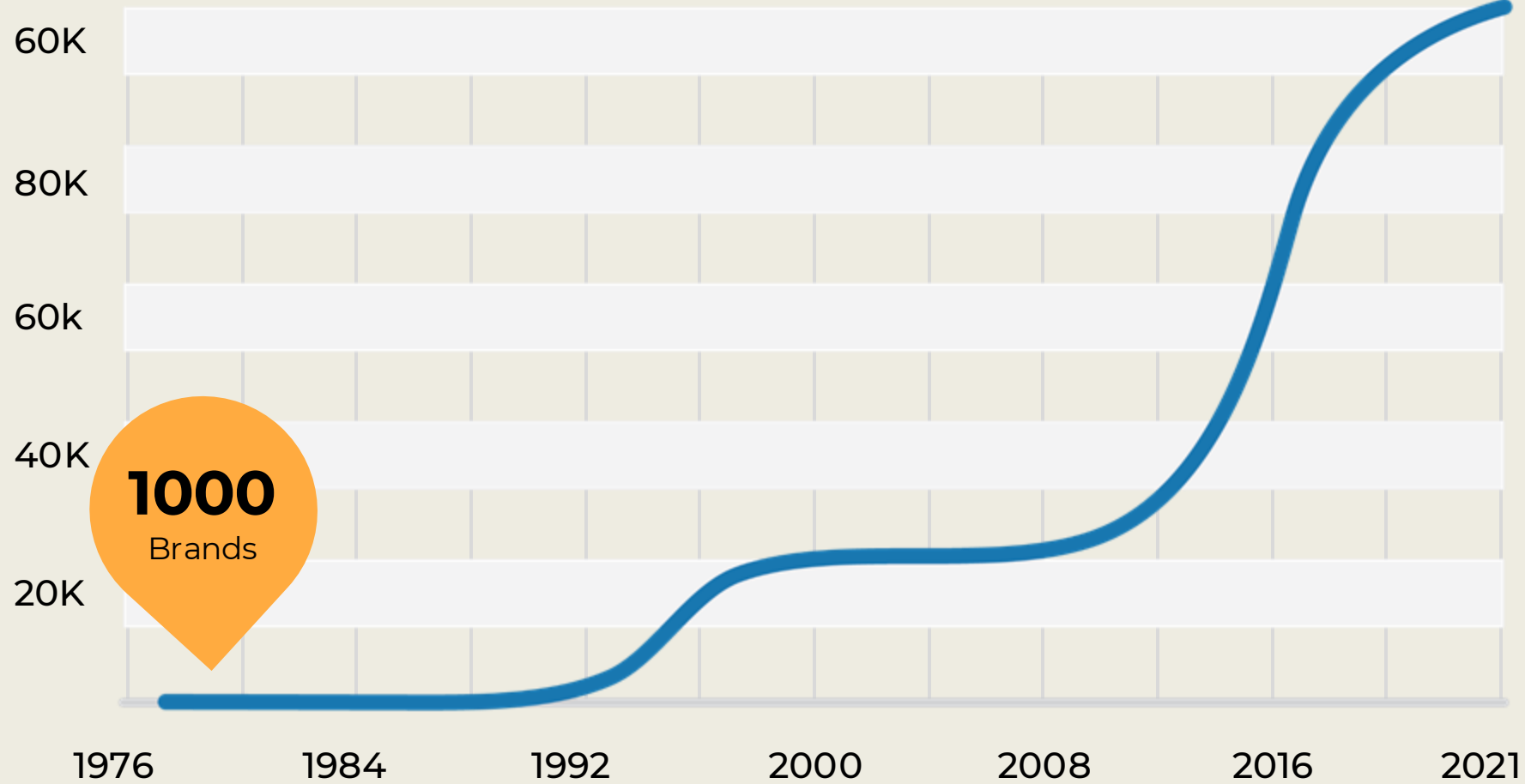


The Impact of the Craft Super Cycle: *Breweries*



9,247
Breweries

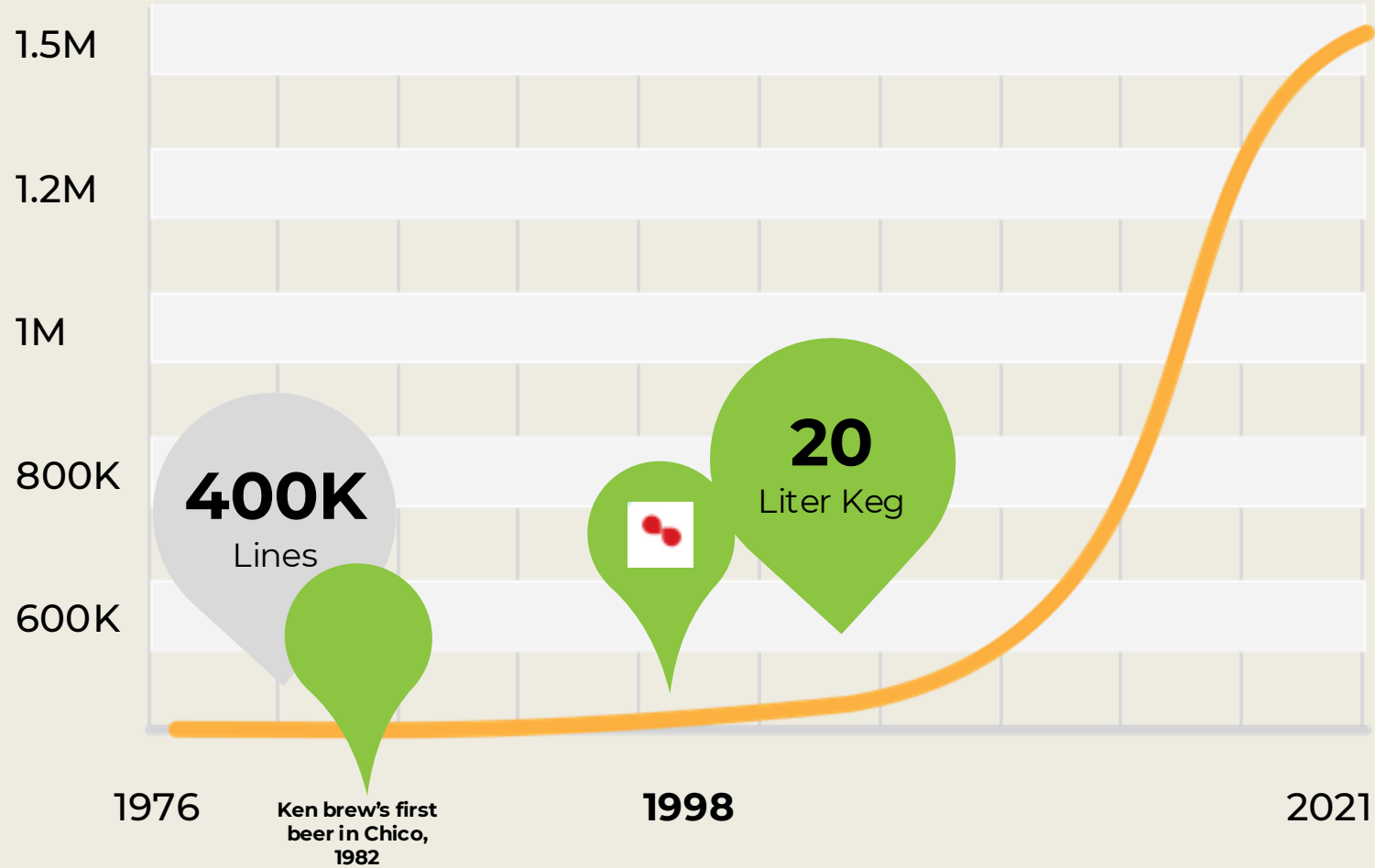
The Impact of the Craft Super Cycle: *Brands*



60K+
Brands

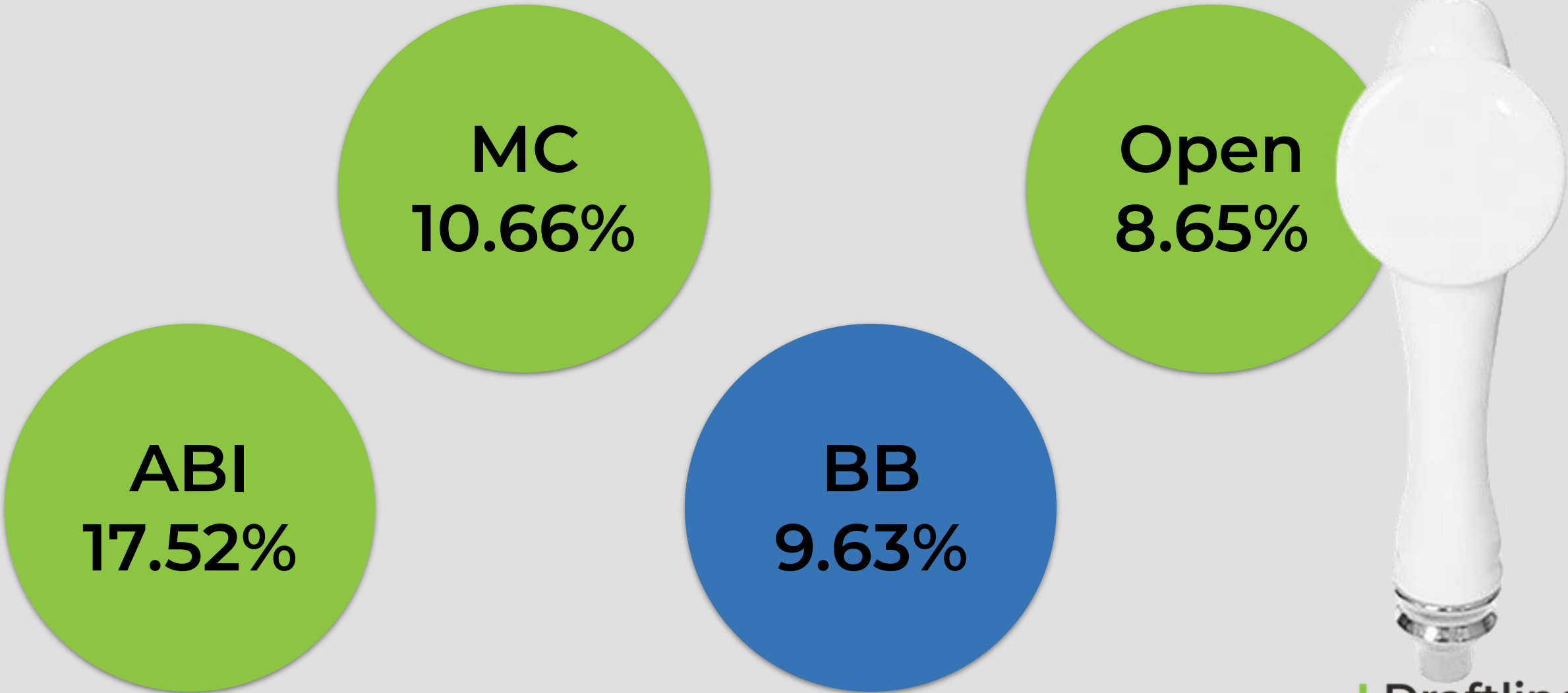
1000
Brands

The Impact of the Craft Super Cycle: *Lines*

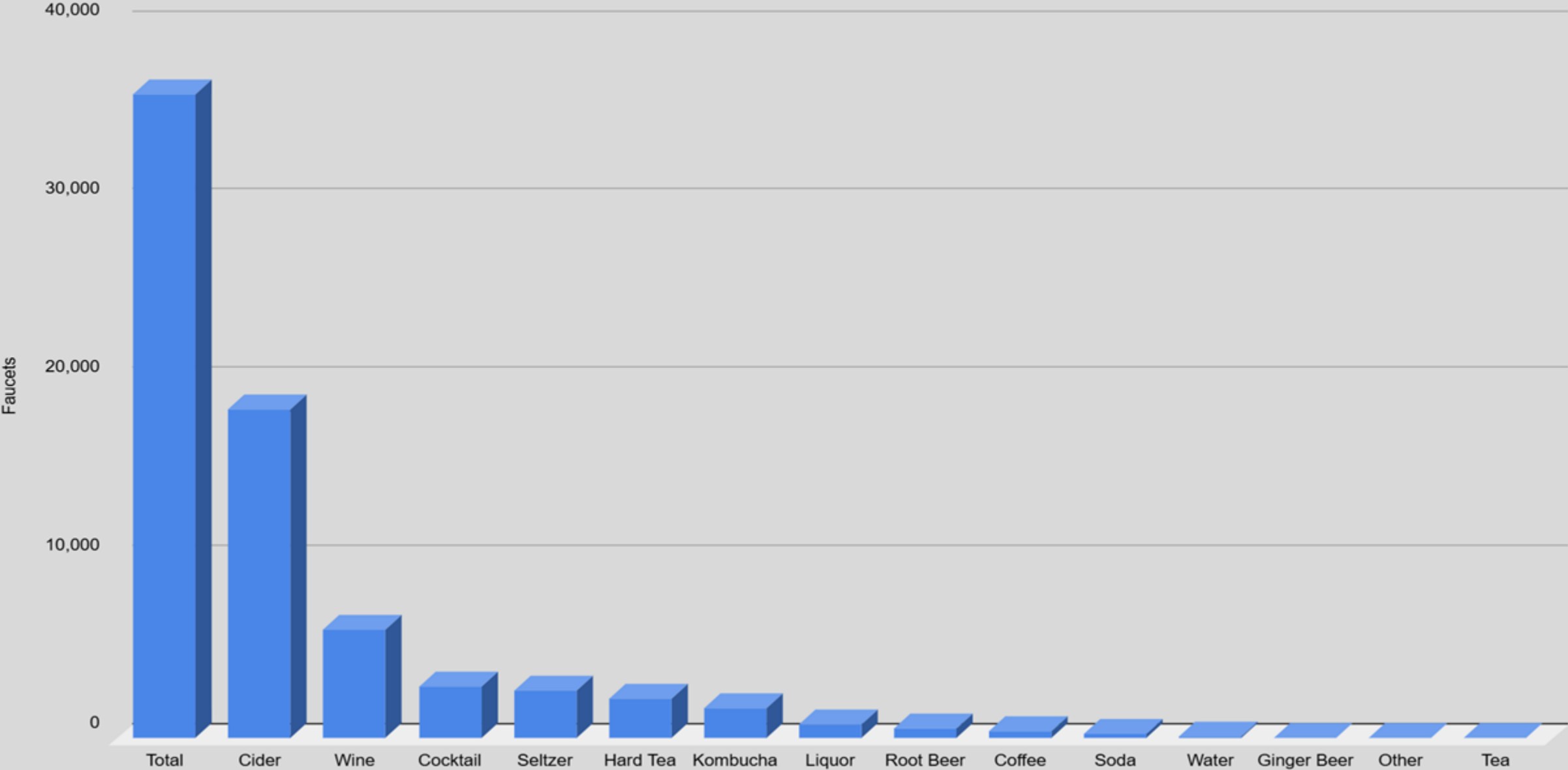


1.5M
LINES

Beyond Beer Draft - Number 3 Supplier



Beyond Beer Draft - Number 3 Supplier



Top 20 Ciders

1) ANGRY ORCHARD CRISP APPLE	11) AUSTIN EASTCIDERS PINEAPPLE
2) BOLD ROCK	12) CIDERBOYS
3) DOWNEAST	13) 2 TOWNS
4) ACE PINEAPPLE	14) GOLDEN STATE CIDER
5) STEM	15) STRONGBOW ORIGINAL DRY
6) AUSTIN EASTCIDERS	16) SCHILLING
7) BLAKE'S HARD	17) MAGNERS
8) BOLD ROCK APPLE	18) BULL CITY
9) ACE	19) GOLDEN STATE CIDER APPLE DR.
10) GOLDEN STATE CIDER MIGHTY DRY	20) ACE PINEAPPLE BEACH





Brand Style Guide

Unforgettable



**CLASSIC TV
COMMERCIAL**

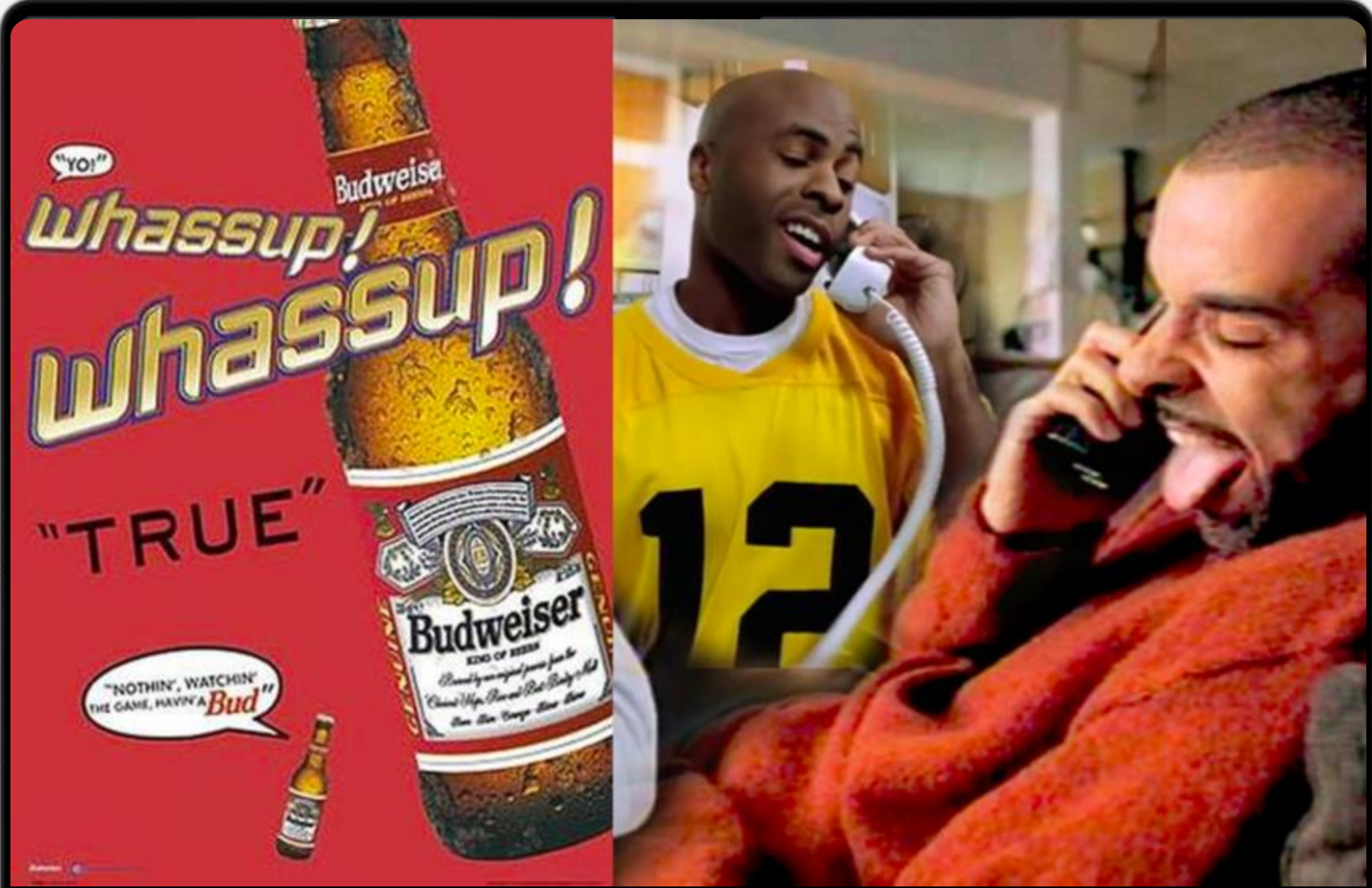
**TASTES GREAT!
LESS FILLING!**

MILLER LITE

The advertisement features a large, close-up image of a Miller Lite beer bottle and a glass of beer with a thick head of foam. The bottle label clearly displays the word "Lite". In the bottom-left corner, there is a smaller inset photograph of four young people in formal attire, likely at a prom or wedding, smiling and posing together.



Unavoidable



Distribution

Basics

- Stack cases
- Clean lines



Waves of Opportunity



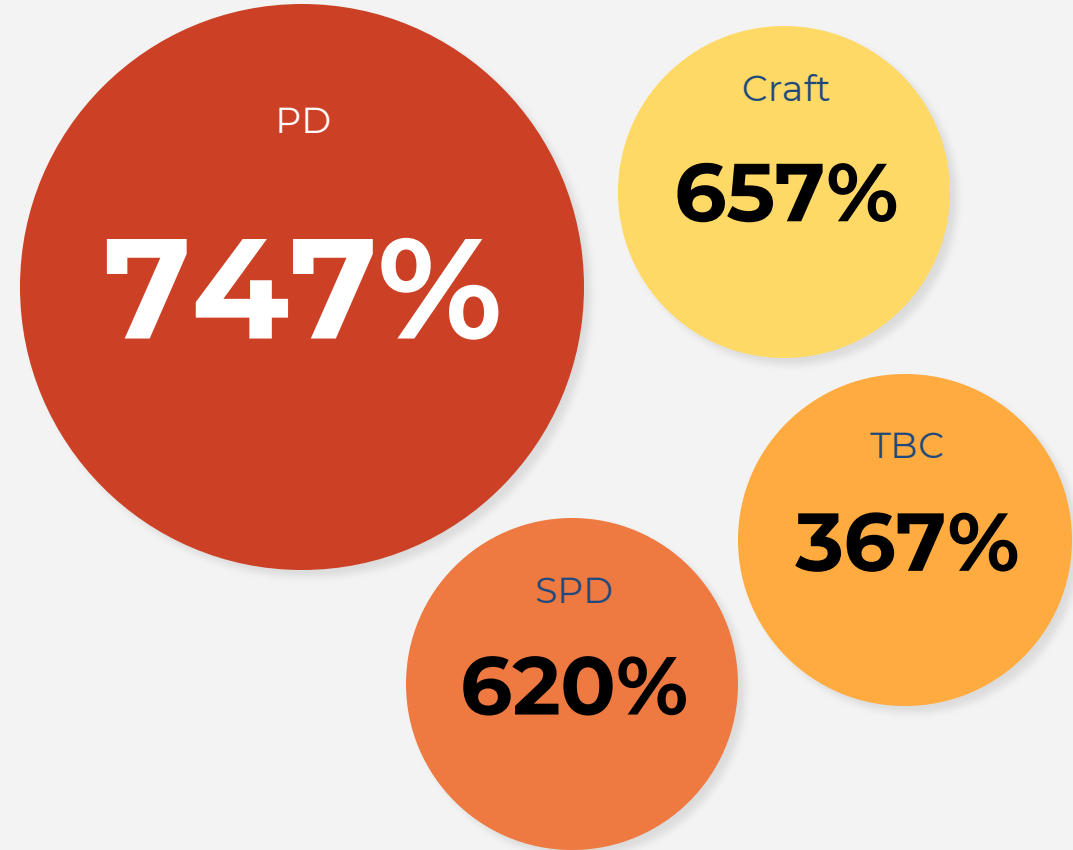
2024 Draft Everywhere



Sometimes the Consumer *Whispers*



Sometimes the Consumer Screams



DRAFTLINE DATA

Source: CGA by NIQ BeverageTrak data, L12w to August 3 2024







Thank You.

For More Information:

jennifer@draftlinetechnologies.com

407-970-2567





Interactive Q & A

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Media Insights & How to Build Media Relationships

Zoe Licata, Senior Reporter - **Brewbound**

Jordan Driggers, Senior Beer Reporter - **Beer Business
Daily**

How to Participate in NCM



[NATIONALCIDERMONT.COM](https://nationalcidermont.com)

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JOIN
SCHILLING CIDER & 3 TIER BEVERAGES
FOR A NIGHT OF CIDER, NETWORKING
AND NATIONAL CIDER MONTH PLANNING!

Thursday, February 6TH | 6pm - 8pm
Ace Bounce 230 N Clark St, Chicago, IL 60601

SCHILLING
HARD CIDER

EXCELSIOR
IMPERIAL CIDERS



SCAN TO RSVP