



VINOSHIPPER®

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NATIONAL DIRECT SALES  
CIDER REPORT

2025

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# EXECUTIVE SUMMARY

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## Market Overview

We're excited to bring you our annual cider report. We recognize cider is a unique beverage that deserves its own dedicated market analysis.

The cider industry continues to navigate broader beverage alcohol market challenges, but there are bright spots – like New York's progressive legislation making shipping more accessible for cider producers.

2024's standout trend was the significant role of product discounting. Orders reflected this shift: while the listed price per liter rose 2.2% from 2023, the actual sale price only increased 0.7% due to an average order discount of 13.7%. Combined with a slight dip in units per order, this meant average order values stayed essentially flat compared to 2023.

Bottled cider's price premium (calculated by comparing bottle and can prices per liter) hit a five-year peak. While canned cider prices remained relatively stable, bottled cider prices climbed 20% over the past five years.

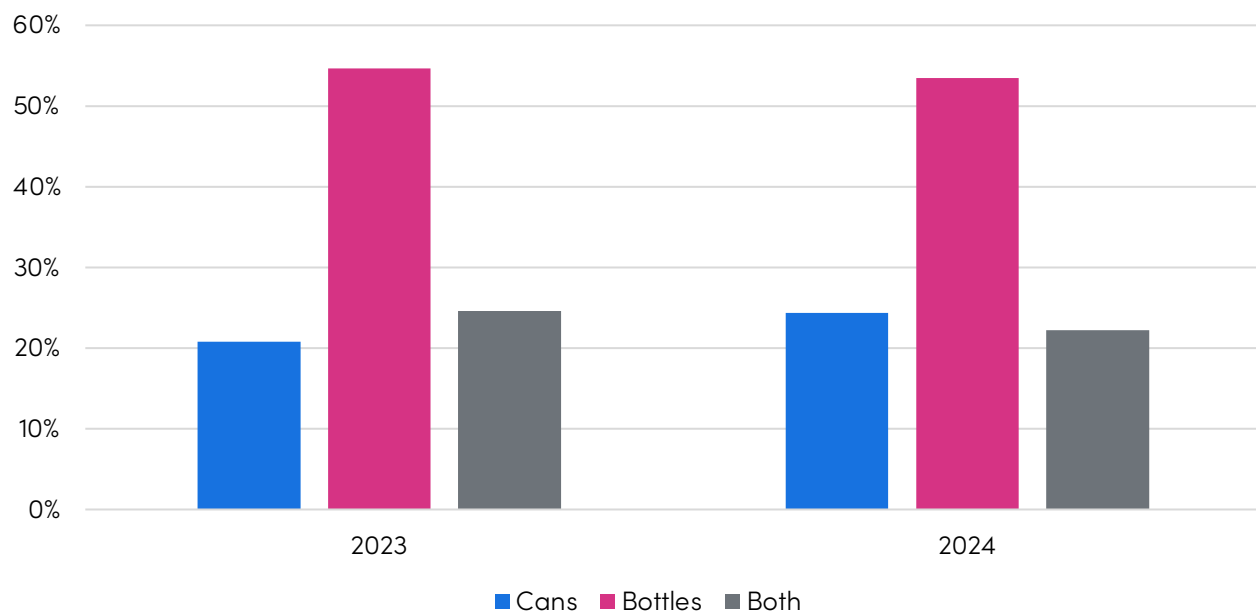
One particularly encouraging development was the growth in cider club programs, reaching a five-year high. More clubs now offer order customization options, which consistently drives larger order sizes as members embrace the flexibility to add extra units to their shipments.

## About the Data

This report analyzes transactional data from Vinoshipper's complete network of U.S. cider producers, spanning point-of-sale, club, and e-commerce channels. While comprehensive, this data is provided for informational purposes only.

# PACKAGING USAGE

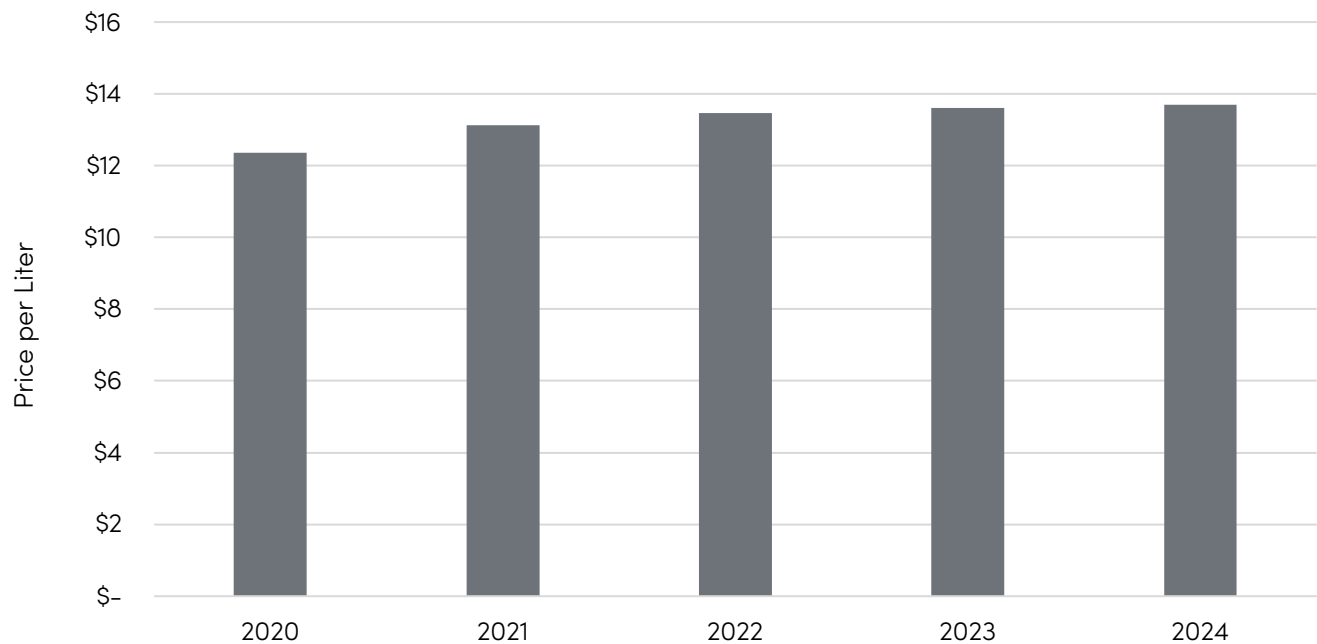
Only cans, only bottles, both container types



Our 2024 data reveals interesting shifts in cider packaging trends. Bottles continue to lead the market, with over 50% of producers using them exclusively – a figure that held steady from the previous year. Interestingly, we saw fewer producers offering both bottles and cans. This shift makes sense when you consider the distinct pricing and discounting strategies each format requires, suggesting some producers are finding it more effective to focus on a single packaging type. Cans emerged as the year's growth story, with producer adoption jumping from 21% to 24%.

# AVERAGE PRICE PER LITER

All products



The price per liter of cider has climbed steadily since 2020, moving from around \$12 to nearly \$14 in 2024. Notably, 2024's modest 1.14% increase fell well below general inflation rates, reflecting the industry's careful balance between rising production costs and competitive pricing. This pricing pressure is a significant industry challenge, as highlighted in the American Association of Wine Economists' latest report, which reveals production costs rising much more steeply than finished product prices. This gap between input costs and market prices points to producers increasingly absorbing production expenses to maintain market competitiveness.



# AVERAGE PRICE PER LITER

## Cans vs bottles



The price difference between bottles and cans remains significant in 2024, with bottled cider commanding substantially higher prices. We decided to split the information into two charts this year to properly highlight the movement in the price of canned cider. While bottle prices have steadily risen, canned cider still appears to be finding its footing.

Bottled cider saw an increase of \$1.04 per liter (4.4% rise), reaching \$24.61 per liter.

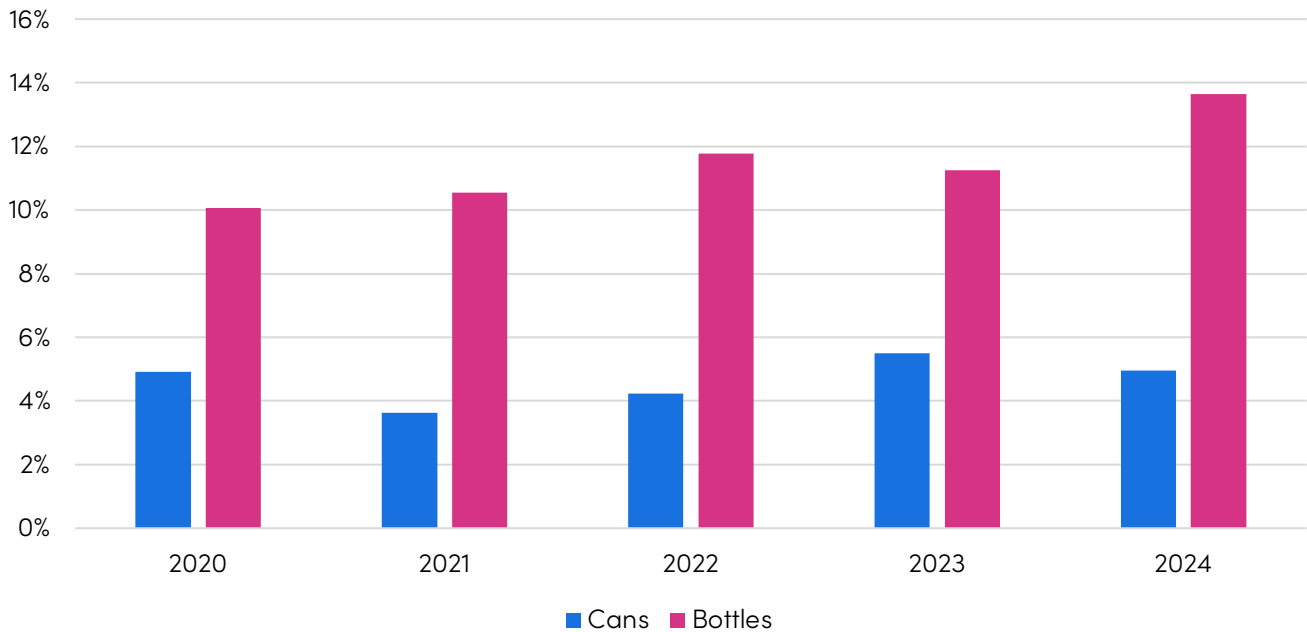
Canned cider prices also increased, although by just 1% to \$7.68 per liter in 2024, continuing to position itself as a more accessible price point option.

Although canned cider makes up 64% of the liters of cider sold, it is only capturing 36% of the value of cider sold.

This growing price gap between formats (nearly 3:1 bottles to cans) suggests distinct marketing and buyer perceptions are at play and acknowledging this may help with the release of future SKUs.

# AVERAGE DISCOUNT

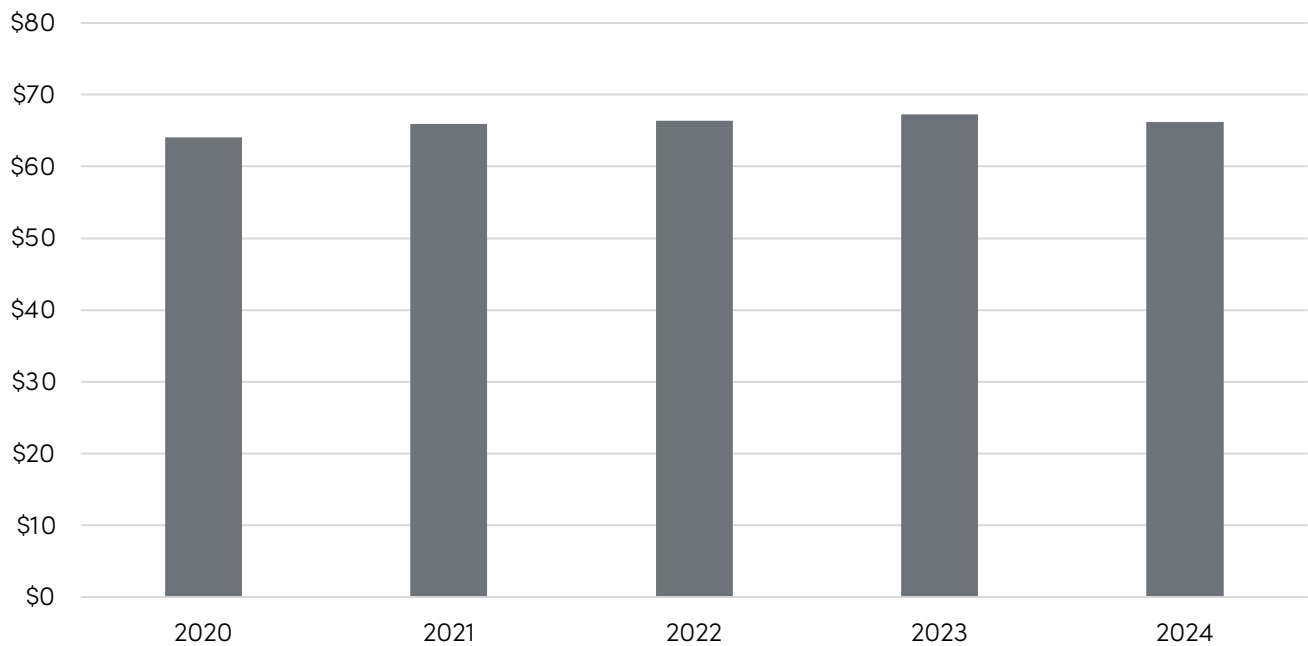
## Cans vs Bottles



The average product discount across the cider category showed an upward trend from 2020 to 2024, rising from 8% to 11%. In 2024, the average discount for bottled cider was 14%, with the average discount for canned cider being 5%. The number of bottles per order have been declining year over year so while discounts are rising and can drive larger order sizes, there appears to be room in finding the correct balance.

# AVERAGE ORDER VALUE

All Products

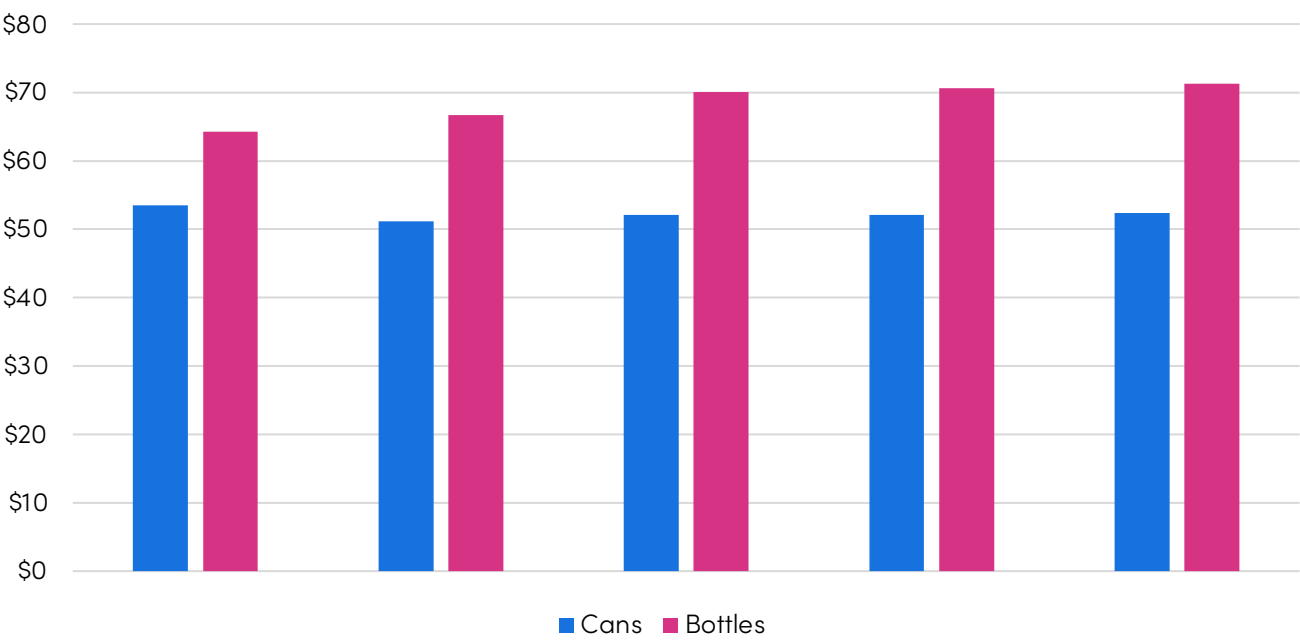


The 2020 to 2024 data shows an overall upward trend in AOV, rising from \$64.08 in 2020 to \$66.17 in 2024. However, 2024 saw a slight decrease from 2023's \$67.25, marking the first year-over-year decline in this period.



# AVERAGE ORDER VALUE

Cans vs Bottles

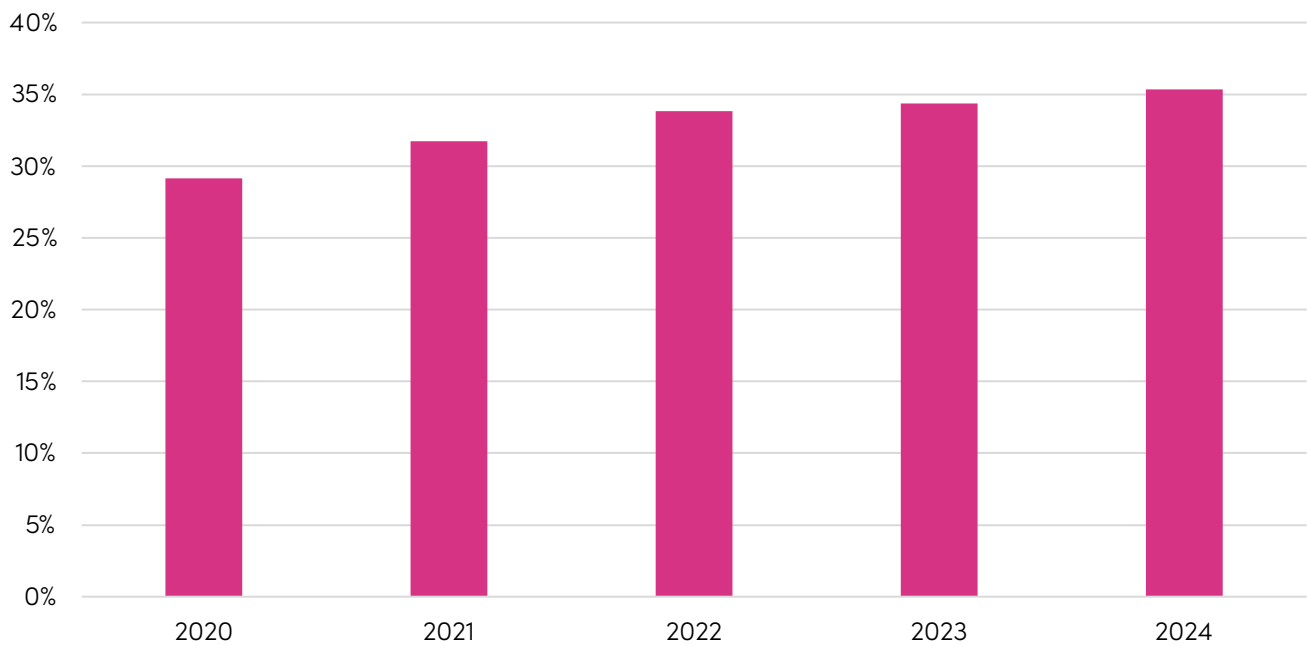


Bottled cider AOV continued its upward trend, reaching \$71.24 in 2024 from \$70.59 in 2023. The number of bottles per order decreased from 2023, but the higher price per liter contributed to maintaining AOV growth.

Canned cider AOV showed minimal change, moving from \$52.11 in 2023 to \$52.41 in 2024. The average number of cans per order slightly increased, helping to maintain stable AOV despite lower price per liter.

# CLUBS

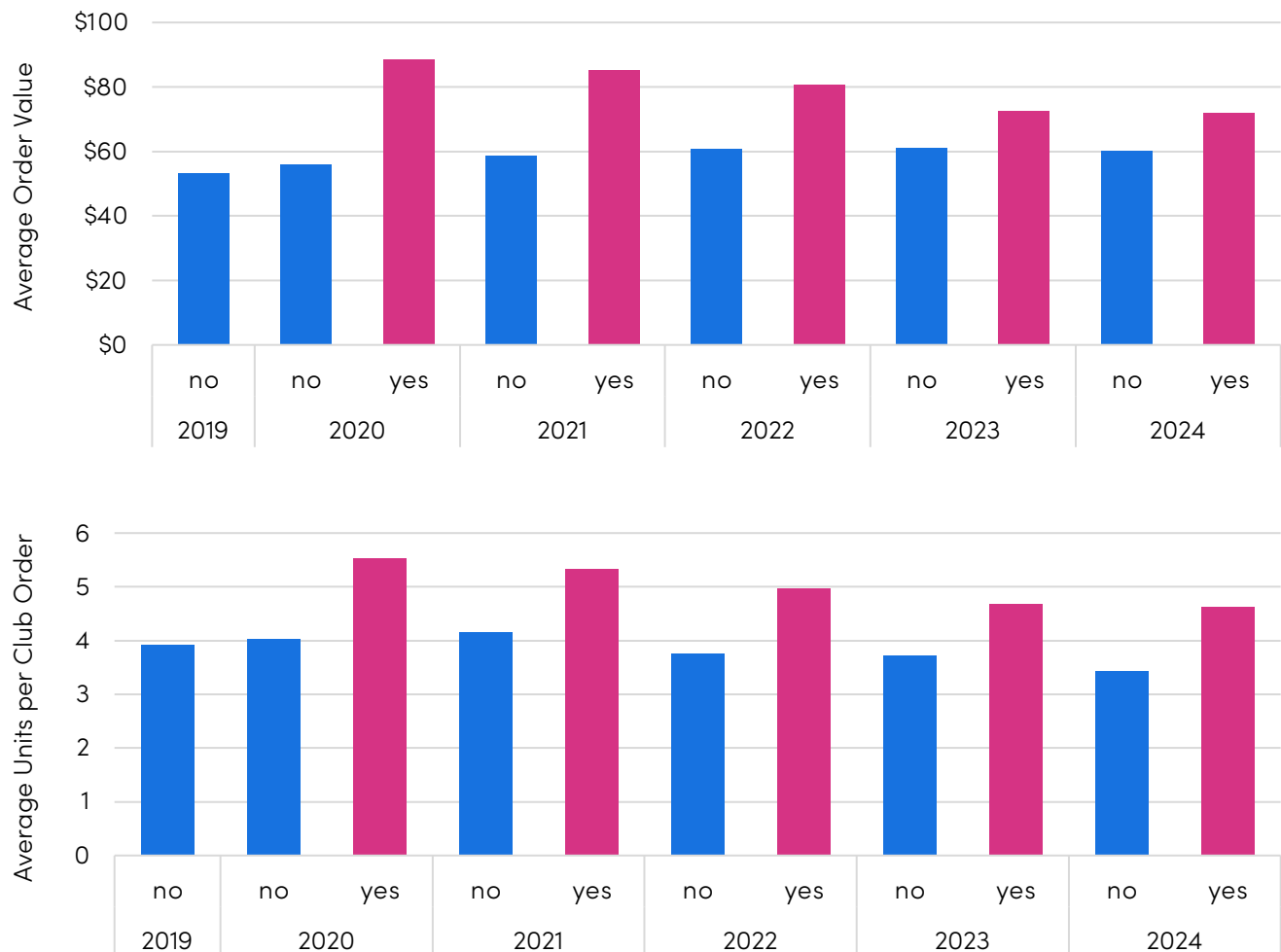
## Producers with clubs



The amount of cider producers offering clubs continued steady growth, rising from 29% in 2020 to 35% in 2024. The year-over-year increases of approximately 2-3 percentage points demonstrate consistent momentum in club adoption.

# CLUBS

## Average Order Value & Units: Customized vs Non-customized.

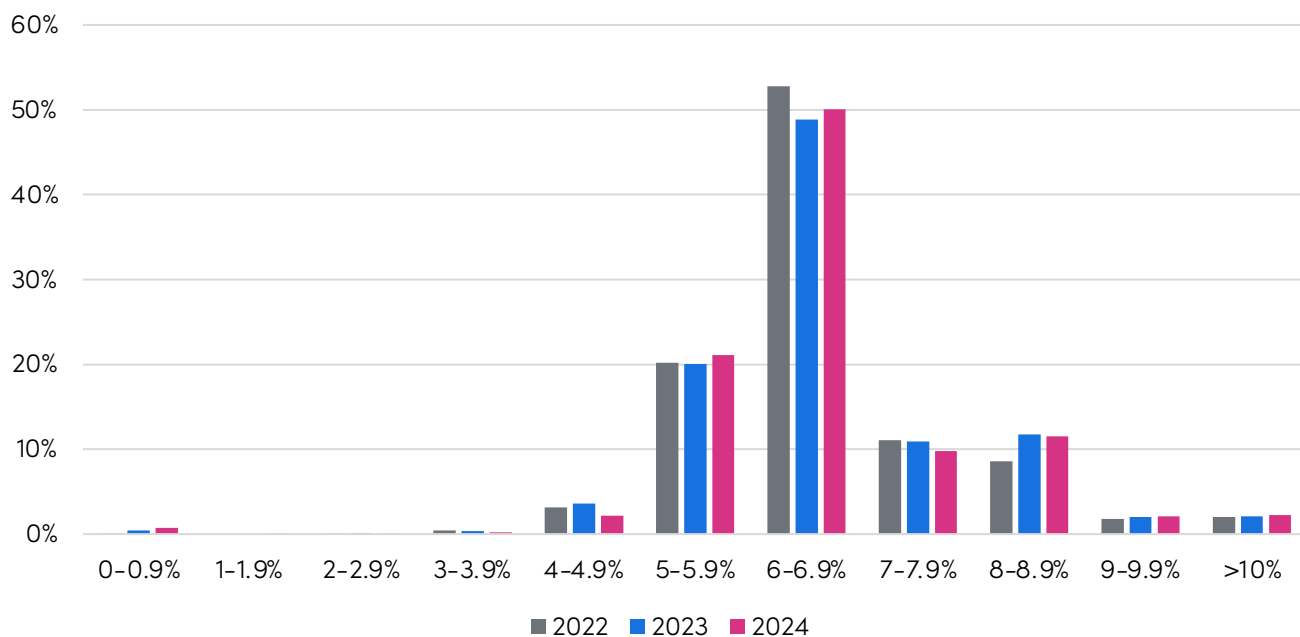


Since Vinoshipper introduced customizable orders in 2020, these orders have consistently generated higher AOVs and unit counts compared to standard shipments. In 2024, customized orders averaged \$72 versus \$60 for non-customized orders. While this value gap has persisted since introduction, it has gradually narrowed from its peak in 2020 pointing to cider producers finding the right balance in their default cider offering.

The units data reinforces this trend, with customized orders averaging 4.7 units compared to 3.4 for standard orders in 2024. This higher unit count in customizable clubs has remained consistent, though it too has moderated from the initial 5.5 unit peak in 2020, suggesting club managers have refined their offering structures.

# ABV SPLIT

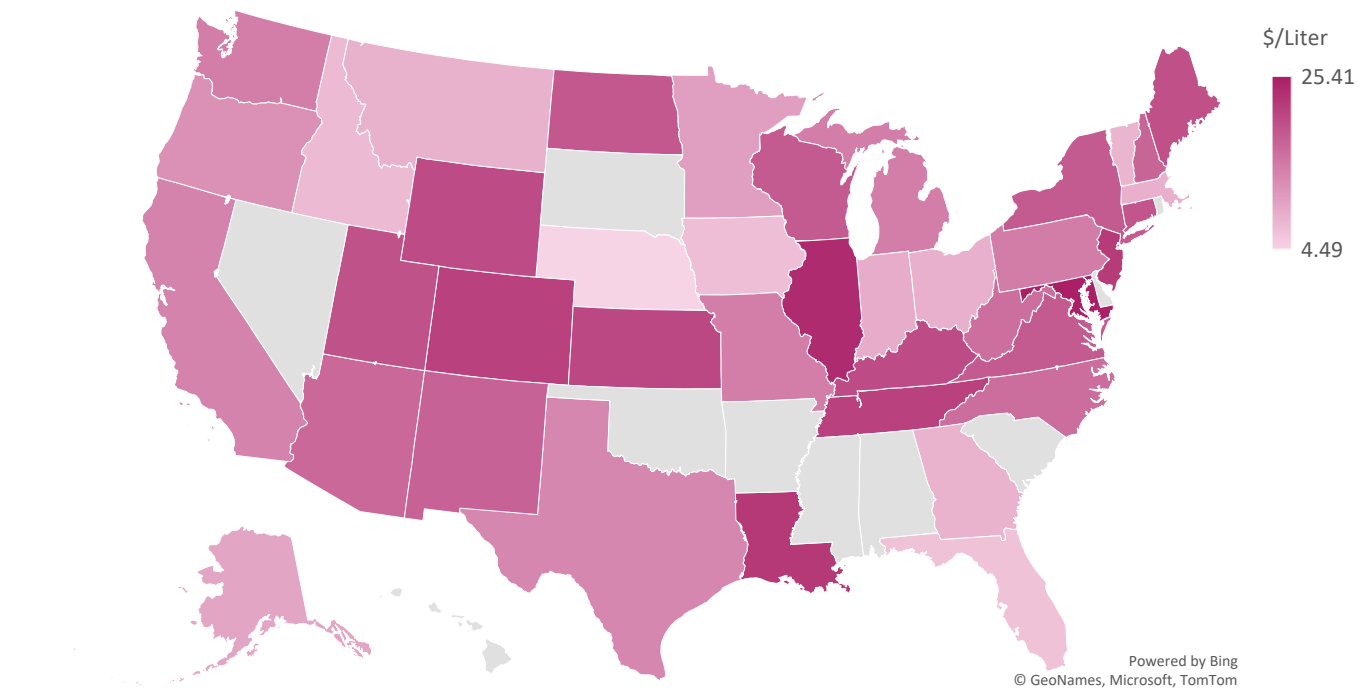
By percentage of products



The 6-7% ABV range continued to lead the category at 50% of total liters sold. A notable development was the growth in the 0-1% ABV segment, which although still a very small percentage of sales, doubled from 2023. There were no sales of these products prior to 2023.

An important piece to note is any products below 7% ABV do not require a Certificate of Label Approval (COLA) from the TTB prior to production.

# PRICE PER LITER BY ORIGIN STATES



The data shows significant price variation across states. Maryland, Illinois, and Louisiana command the highest prices, ranging from \$22-25 per liter.

New York and Virginia maintain strong mid-to-high tier pricing (\$18.45 and \$18.48), reflecting established market presence.

# TOP SELLING CONTAINER TYPES

Ranked by 2024 sales value

Container Type	Unit Description	2024 Rank	2023 Rank	2024 \$/Liter	2023 \$/Liter	Change in \$/Liter
Bottle	750 mL	1	1	\$24.27	\$23.81	2%
Can	4 x 12oz	2	2	\$8.48	\$8.62	-2%
Can	6 x 12oz	3	3	\$5.01	\$5.09	-1%
Can	12 x 16oz	4	5	\$8.73	\$8.77	0%
Bottle	500 mL	5	4	\$20.72	\$20.19	3%
Can	4 x 16oz	6	7	\$7.97	\$7.76	3%
Can	12 x 12oz	7	6	\$10.84	\$9.69	12%
Bottle	375 mL	8	8	\$45.44	\$44.62	2%
Can	16oz	9	9	\$10.88	\$11.23	-3%
Can	24 x 16oz	10	12	\$8.17	\$7.68	6%
Can	4 x 19.2oz	11	11	\$5.83	\$6.66	-13%
Can	4 x 355 mL	12	13	\$10.68	\$10.74	-1%
Can	12oz	13	14	\$8.39	\$9.04	-7%
Bottle	22oz	14	10	\$18.71	\$17.13	9%

# ABOUT VINOSHIPPER

## Transforming Direct Sales in the Beverage Alcohol Industry

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Founded in 2006, Vinoshipper stands as the leading compliance-driven platform empowering beverage alcohol producers to expand sales, connect with customers, and simplify their business. Our robust compliance engine powers direct sales success for wineries, cideries, meaderies, and distilleries nationwide through a fully integrated suite of solutions including a compliance-backed online store, intuitive point-of-sale system, dynamic club management tools, and streamlined UPS integration.

Our commitment to innovation stems from a deep understanding of the beverage alcohol industry's unique challenges. Through our comprehensive Compliance Management Services, we handle all aspects of regulatory compliance, allowing our partners to focus on growing their business.

The Vinoshipper team continuously develops our platform to enhance operational efficiency, ensure compliance, and create new opportunities for our partners' success.

If you are interested in learning more about Vinoshipper, visit us at [vinoshipper.com](https://vinoshipper.com) or email us at [customerservice@vinoshipper.com](mailto:customerservice@vinoshipper.com).



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## CEO BLOG

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