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The Rise of Premium Cider in the US

IWSR US Navigator reveals dual peaks and regional preferences driving cider's evolution

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Cider in the United States is experiencing notable seasonal variations, regional preferences, and a shift toward premium products, according to the latest findings from IWSR US Navigator. This platform, which provides comprehensive data on the US beverage alcohol market, highlights key trends driving the cider category despite a recent overall decline in volume.

Seasonal trends show cider consumption peaking twice annually. Summer months from June to August see a surge, with volumes averaging 1.1 times higher than fiscal year norms over the last five years. California plays a central role in this trend, driven by outdoor activities, tourism, and warm weather. Another peak occurs in late fall and mid-winter, particularly in October, November, January, and February. States such as Washington, Vermont, and New Hampshire lead per capita demand during these colder months, suggesting a preference for cider at seasonal gatherings and in warm, spiced beverages.

Regional differences further underline cider's niche appeal. The Northeast and Pacific Northwest emerge as leaders, with Washington and Vermont exhibiting per capita consumption rates far above the national average. Washington, the country's largest apple producer, benefits from abundant local supply and a robust cider culture, while Vermont's vibrant craft scene bolsters its position despite being one of the smallest states by population. In contrast, warmer states like California and Texas generate high total volumes, particularly in summer, while cooler regions experience winter demand spikes.

Premium cider categories are also gaining traction. While the Standard tier dominates with 92% of 2023 sales, the Premium and Premium+ segments have steadily grown since 2022. States with established cider traditions, such as Massachusetts, Oregon, and New York, lead in Premium+ market share, indicating a consumer shift toward higher-quality offerings. Southern states, including Mississippi, Alabama, and Kentucky, remain focused on more affordable categories, but larger cider markets like California and Washington hold significant potential for premium segment growth. A modest increase in Premium+ adoption in these states could have a substantial impact on the broader market.

The data underscores cider's dual peaks in demand, regional strengths, and opportunities for premiumization, offering a nuanced view of this evolving segment of the US beverage industry.