Interreg Co-funded by the European Union

Central Baltic Programme

BALT-FIN-CIDER

“Exports of the Baltic and Finnish Craft Ciders to Australia” No. CB0700297

Intruduction to the Australian Market

CIDER AUSTRALIA

Warwick Billings

Cider Australia

Cider Australia is an independent, not-for-profit organisation funded by cider businesses and sponsors. Our mission is to build a sustainable cider category by undertaking activities that improve the market penetration and quality of ciders produced and marketed in Australia.

Cider in Australia

How big is the market?

Source: Westons report 2025

Cider in Australia

Who makes cider in Australia?

- Big brewers – mainstream ciders
- Somersby – market leader (Carlsberg) 30%
- Strongbow – second biggest (Heineken) 20%
- Good Drinks – Rekorderlig + Magners
- Others: Bulmers, Mercury, Orchard Crush, Pure Blonde, Mountain Goat, Little Creatures, 5 seeds,
- Pinnacle and family (Dan Murphy’s own brand) ie Castaway, Zytho, Amply
- Brands are strong, but ownership changes with mergers etc

Bigger smaller producers

- In no particular order:
- Three Oaks, Hills Cider Co, Barossa Valley Cider Co.
- Willie Smiths, Spreyton, Coldstream
- Bilpin, Hillbilly, Batlow, Young Henry’s, Small Acres, Sydney Cider
- Flying Brick, Darkes, Franks, Plenty, Cheeky Rascal,
- Thatchers (imported)
- Many smaller local producers

Main activities

Trust Mark

Australian Cider Awards

Conference

Advocacy and Policy

Engagement

Approx 100 members

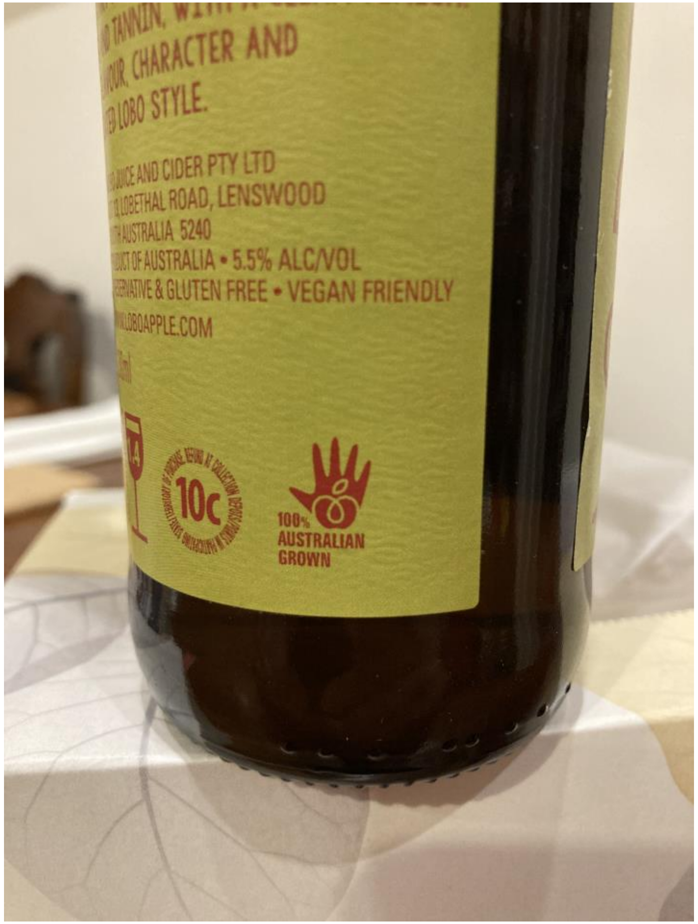
CIDER AUSTRALIA

Cider Australia Trust Mark

100%
AUSTRALIAN
GROWN

The trust mark may be displayed on ciders made from 100% Australian grown ingredients.
It is only available to members of Cider Australia to ensure the ciders meet a minimum industry quality standard.

Cider Australia Trust Mark



CIDER AUSTRALIA

2025

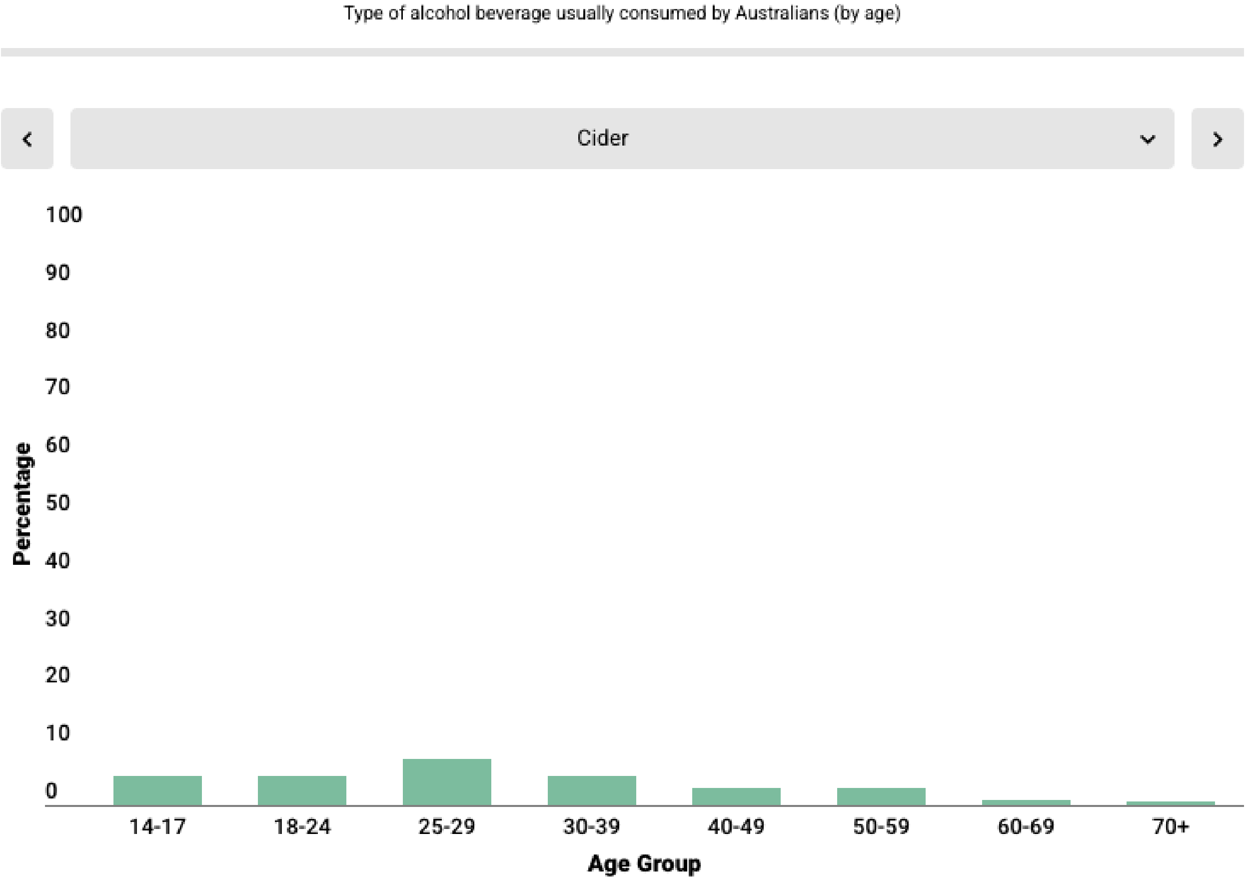
AUSTRALIAN CIDER AWARDS

27-29 APRIL 2022

AUS CIDER 2022

WESTERN AUSTRALIA

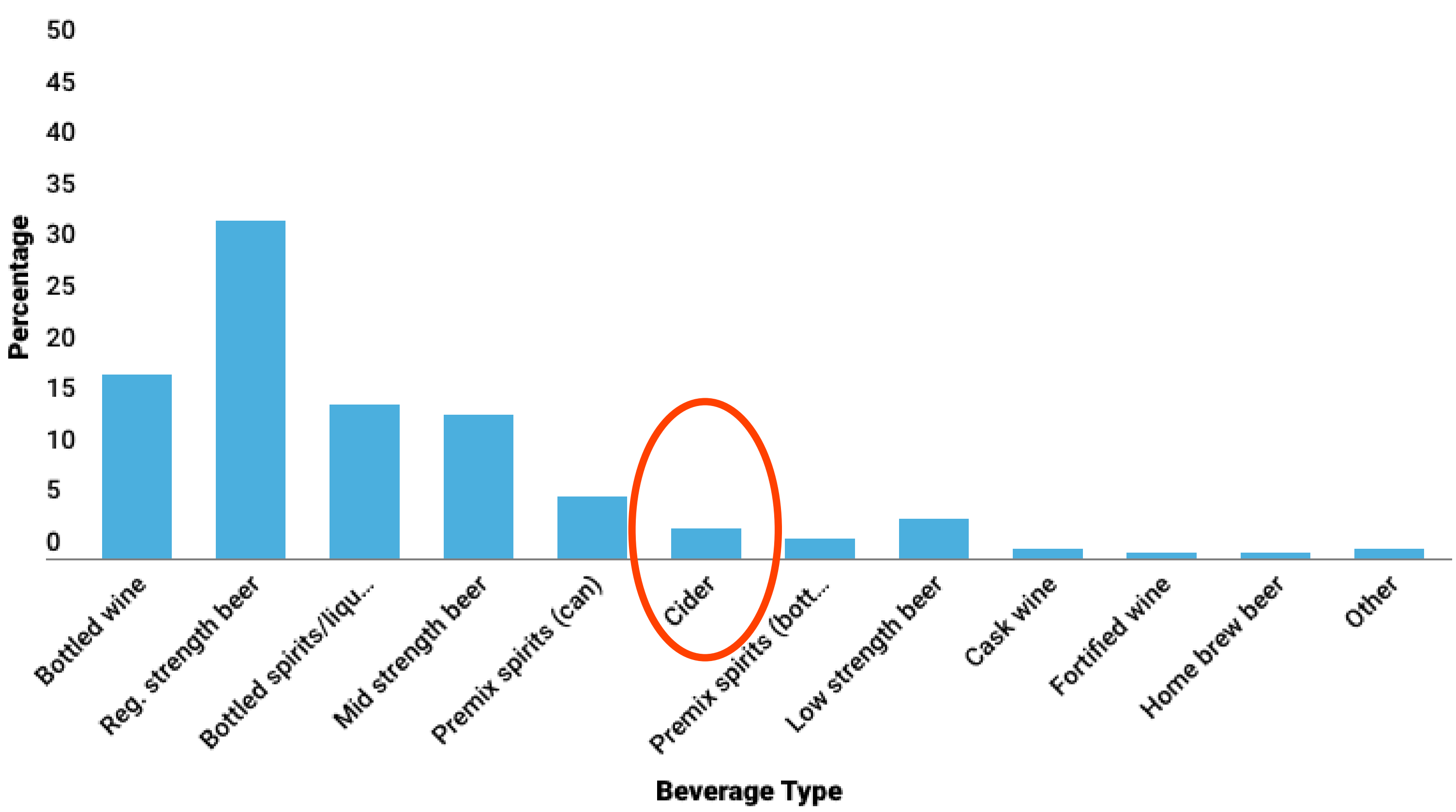
Who buys cider in Austraila?



Source: Australian Institute of Health and Welfare (AIHW). 2022-23 National Drug Strategy Household Survey (NCETA secondary analysis, 2024).

Men

Women



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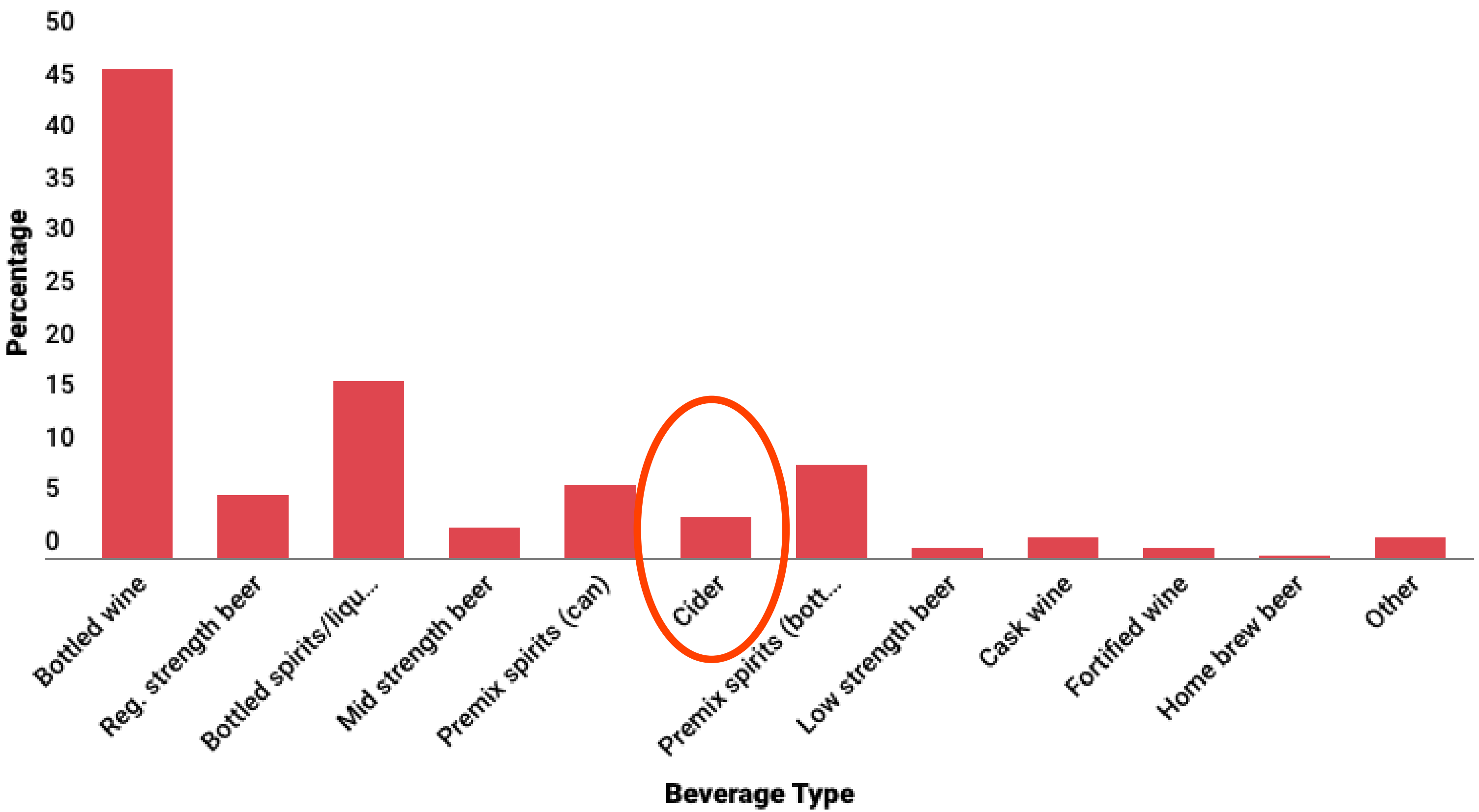
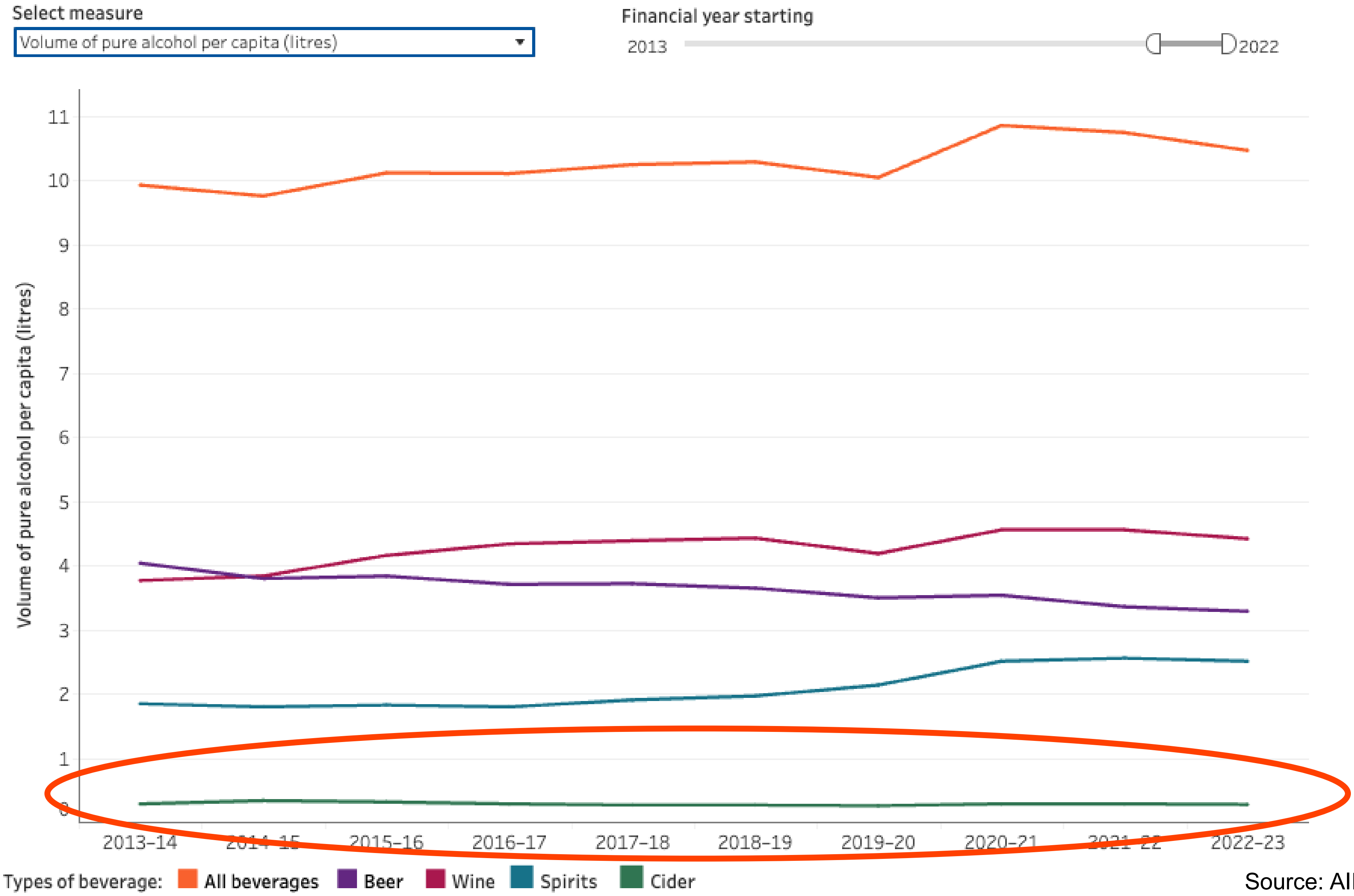
Men | Women



Source: Australian Institute of Health and Welfare (AIHW). 2022-23 National Drug Strategy Household Survey (NCETA secondary analysis, 2024).



Select measure
Volume of pure alcohol per capita (litres)
Financial year starting
2013
2022
Volume of pure alcohol per capita (litres)
11
10
9
8
7
6
5
4
3
2
1
0
2013–14
2014–15
2015–16
2016–17
2017–18
2018–19
2019–20
2020–21
2021–22
2022–23
Types of beverage:
All beverages
Beer
Wine
Spirits
Cider

Source: AIHW

Where is cider sold ?

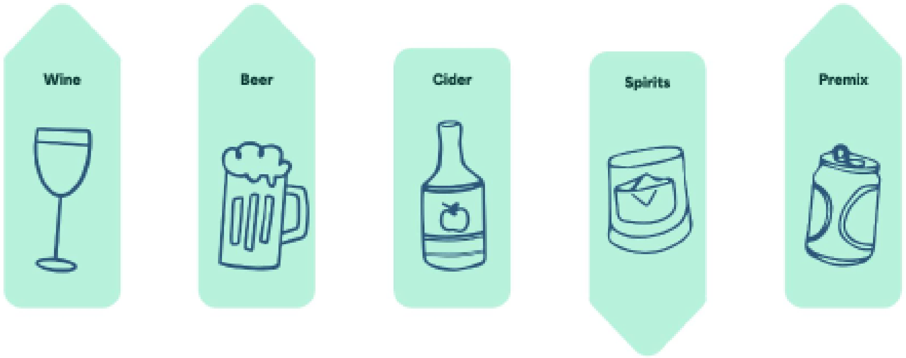
- Difficult to obtain good data
- On premise – Hotels, bars, clubs, pubs, cafes, restaurants - what you call Horeca in Europe
- Off premise – take homes – supermarkets? bottleshop, chain and independant

Off premise

- Endeavour – Dan Murphy, BWS - biggest
- Coles – First Choice, Liquorland, second biggest
- Others – vary by state, some powerful smaller chains and also buying groups

Category Performance

Growth by Category



Growing Category Share

- Sparkling Wine
- Spritzer Single Serve/Misc
- Cask Wine
- Rose Wine
- Low Carb Beer
- Mid Strength Beer
- Ginger Beer
- Stout
- Cider - Apple
- Agave
- Vodka
- Liquor - Miniatures
- Aperitifs & Digestifs
- Premix Vodka
- Premix Whisky

Declining Category Share

- Red Wine
- Champagne
- White Wine
- Full Strength Beer
- Premium Beer International
- Craft Beer Australian
- Cider - Flavoured
- Cider - Pear
- Gin
- Liqueurs
- Rum
- Pre Batch Cocktail
- Premix Bourbon
- Premix Seltzer
- Premix Gin
- Premix Rum

Source: Endeavour magazine 2025

On premise

- Many agents – diffuse market
- Very relationship based
- Some significant groups
- Some amount of “lock out” activity

The rules…..

- All states now have a 10c bottle refund system.
- They are all run separately, need to register product and be approved in each state where selling. Typically cost producer 13-17c per bottle to participate

The rules……

Food Standards and ATO have slightly different interpretations of cider rules and consequent taxation. Some complexities.

Important to be aware and comply with both.