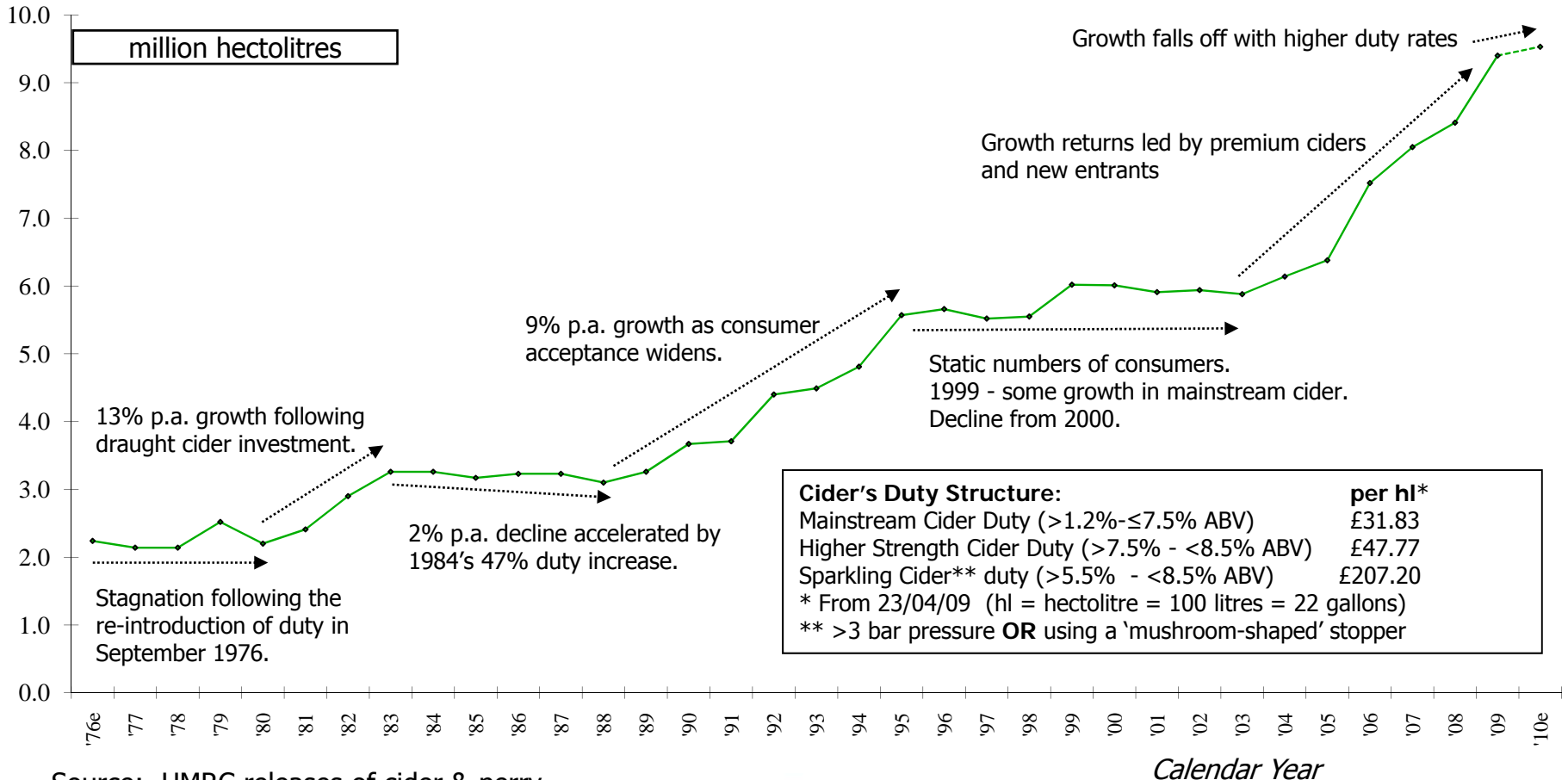


Development of the UK Cider & Perry Market

since the reintroduction of excise duty in September 1976



Source: HMRC releases of cider & perry

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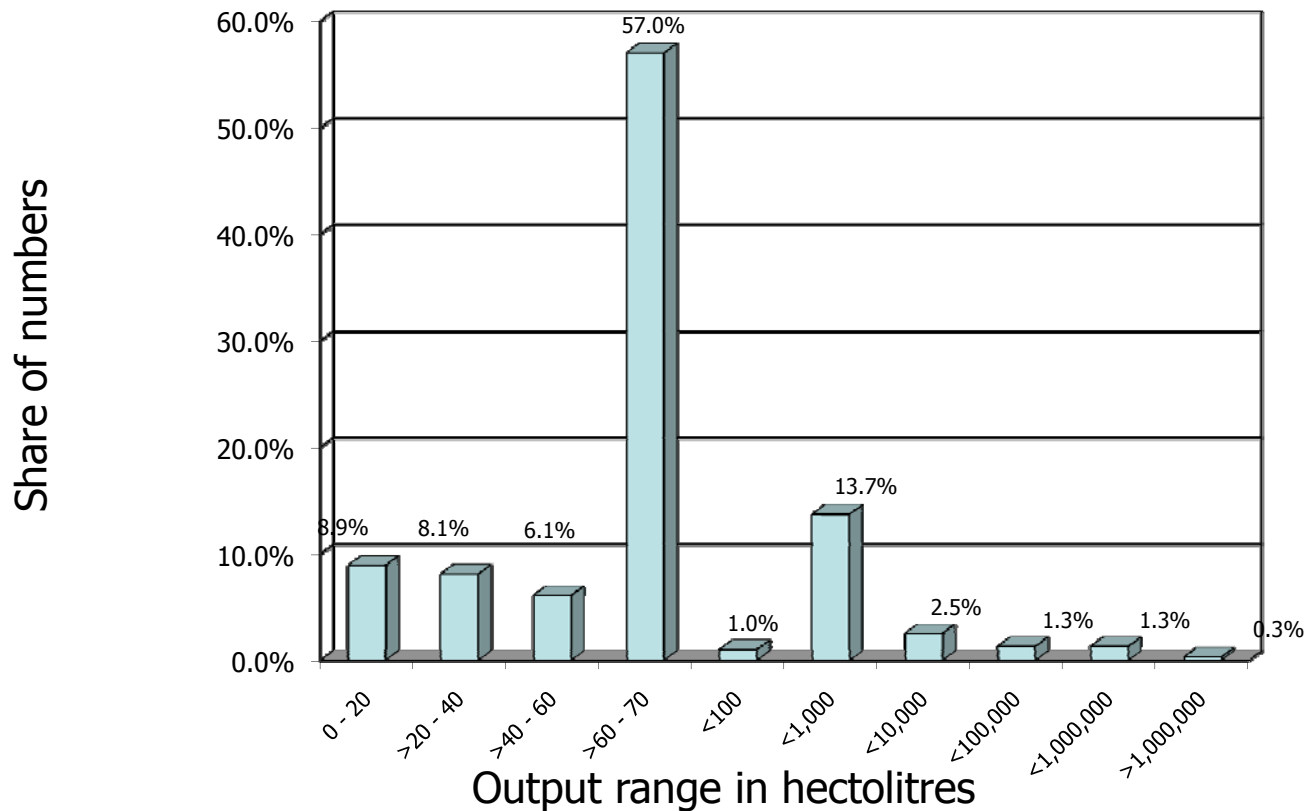


of
CIDER MAKERS

Distribution of UK Cider Makers

Share of numbers in 2008 distributed by size of output

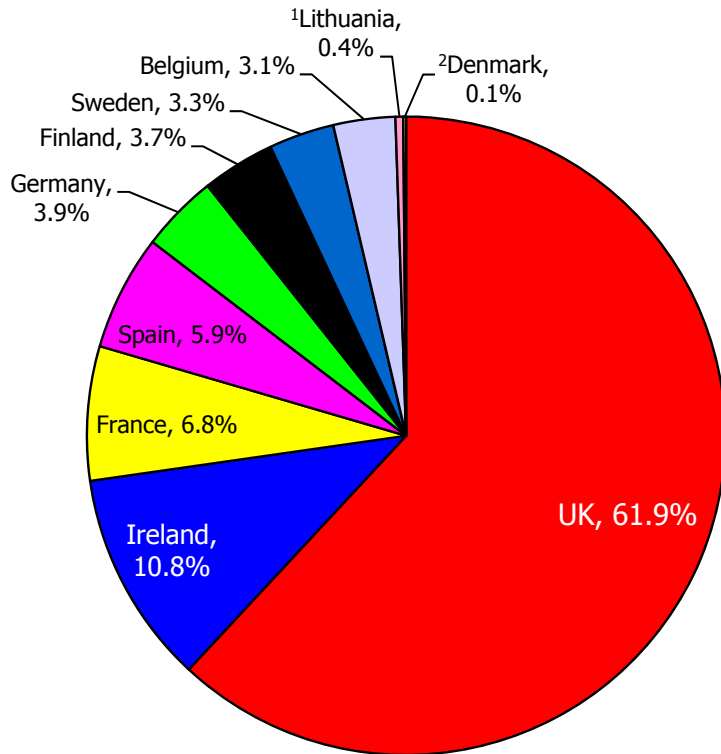
NACM estimates a minimum of 480 active cider makers in the UK



Source: NACM estimates

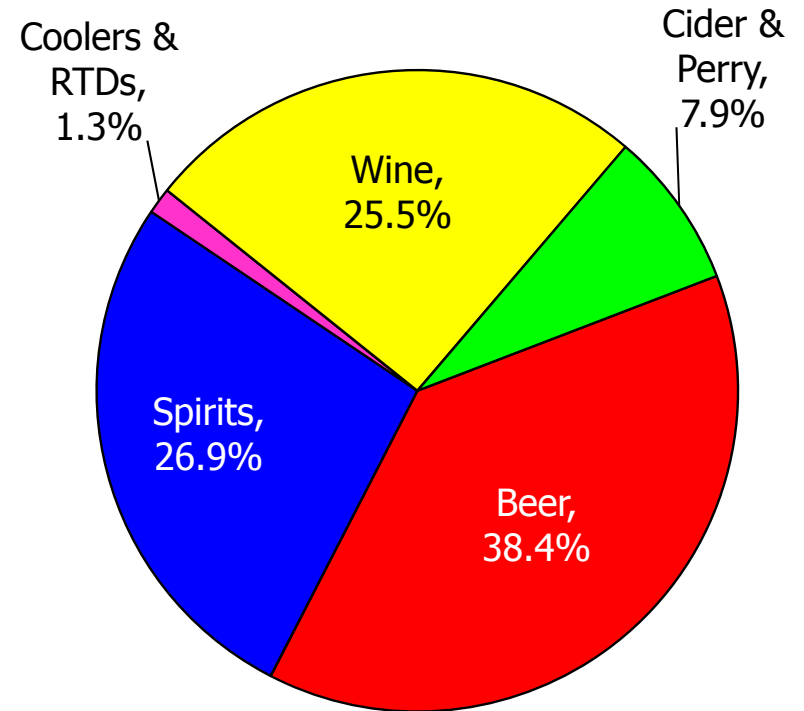
Cider, the EU & the UK Drinks Markets

1. Share of EU Production Volume 2008



Source: AICW members' reports

2. Share of UK Servings* 12 months to September 2010



*Portman Group serving sizes:

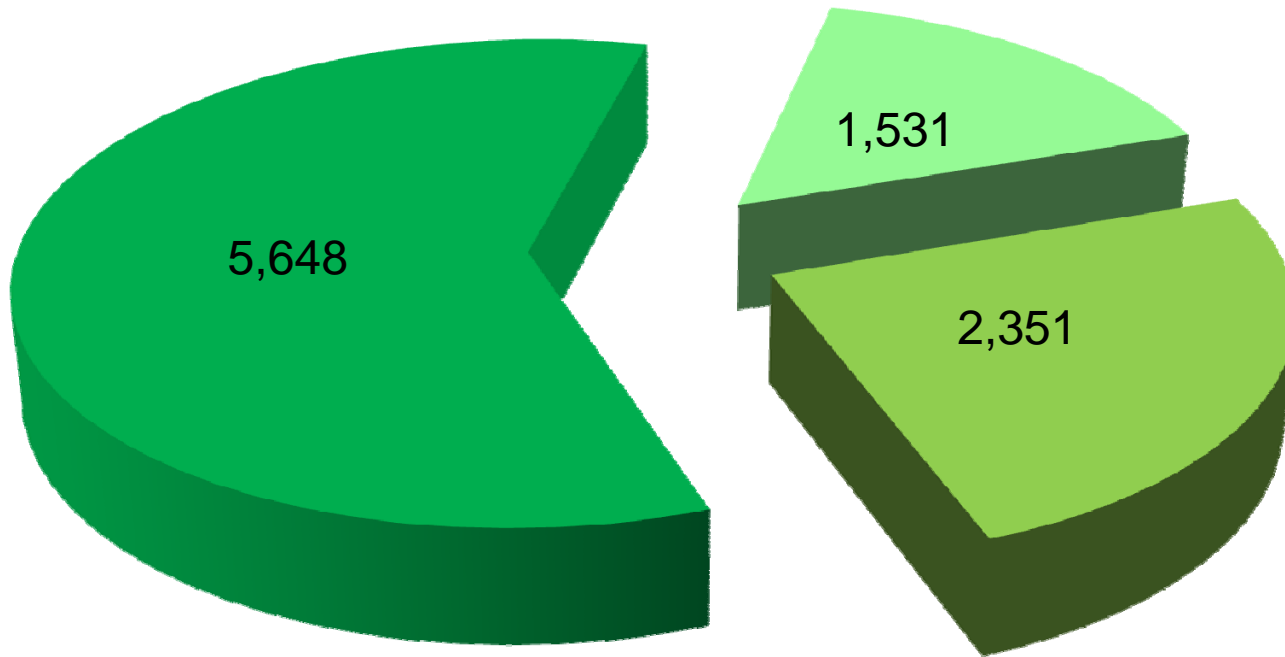
Beer, Coolers & Cider ½ pt(284ml), Wine 125ml, Spirits 25ml

Source: HMRC Releases

Distribution of UK Cider Sales

by On and Off trade and draught and packaged

12 Months Volume Sales to September 2010, '000 hl



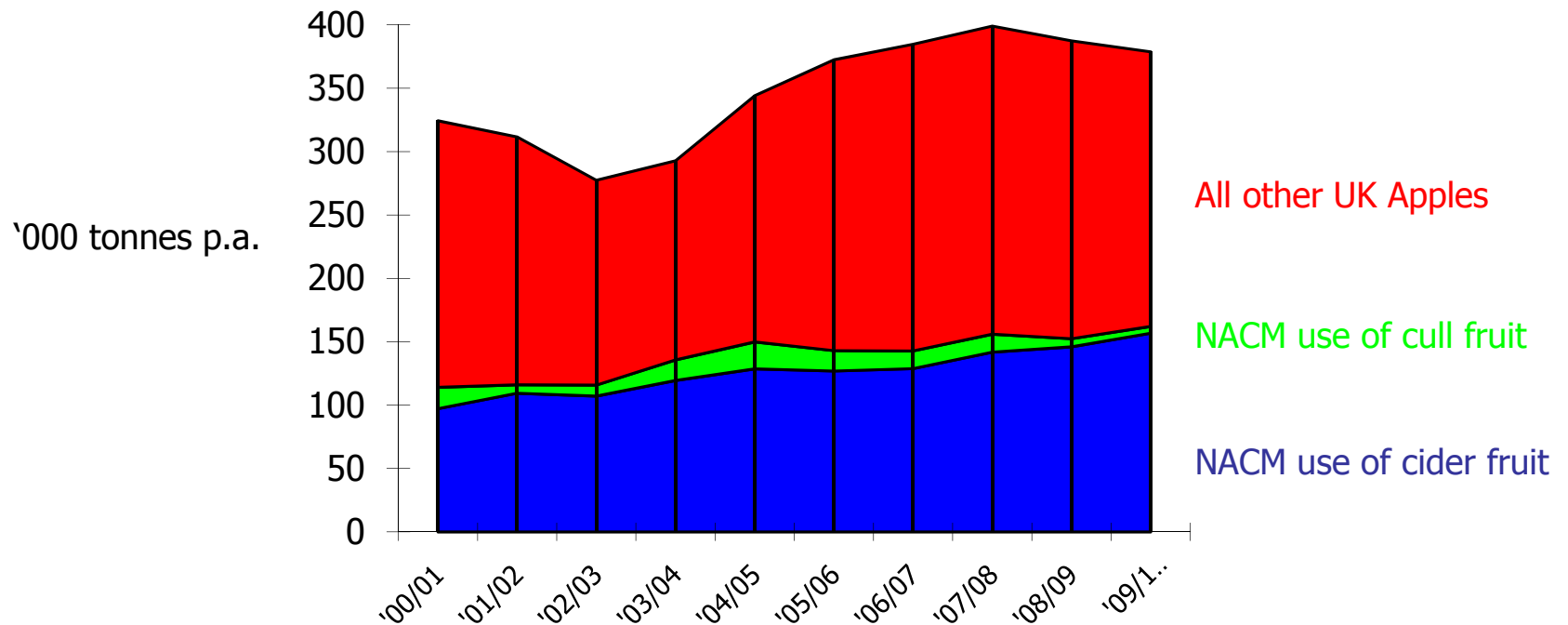
■ Off Trade, Packaged ■ On Trade, Packaged ■ On Trade, Draught

Source: HMRC releases split by trade audit reports

NACM Members' Significance in UK Orcharding

The Cider Industry's use of UK apples of all types

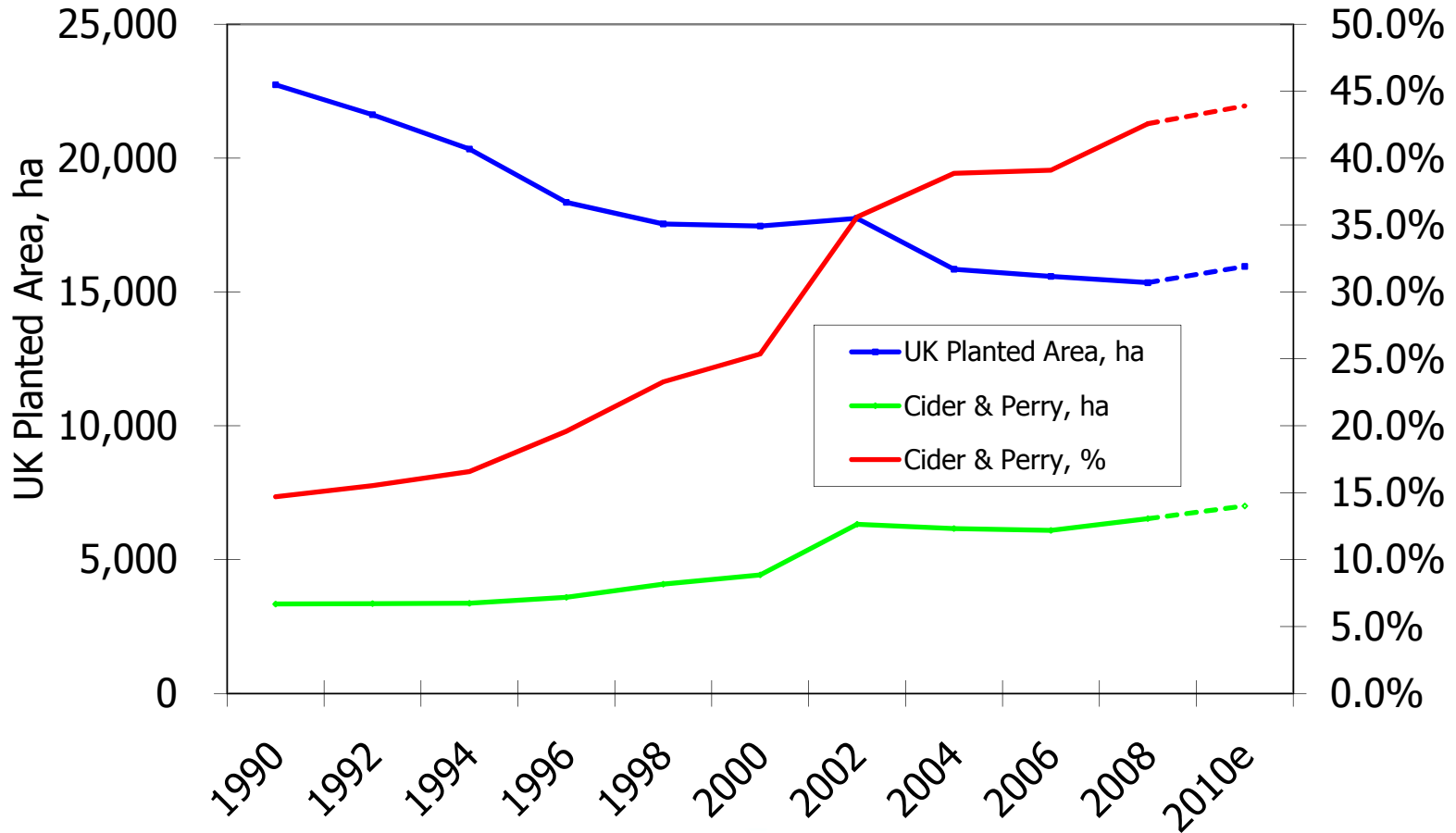
– 2 year Moving Averages



Source: DEFRA and NACM members' reports

NACM Members Orcharding Investment

Change in mid-year UK planted area – 3 year moving average



Sources: DEFRA with NACM estimates for 2010

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