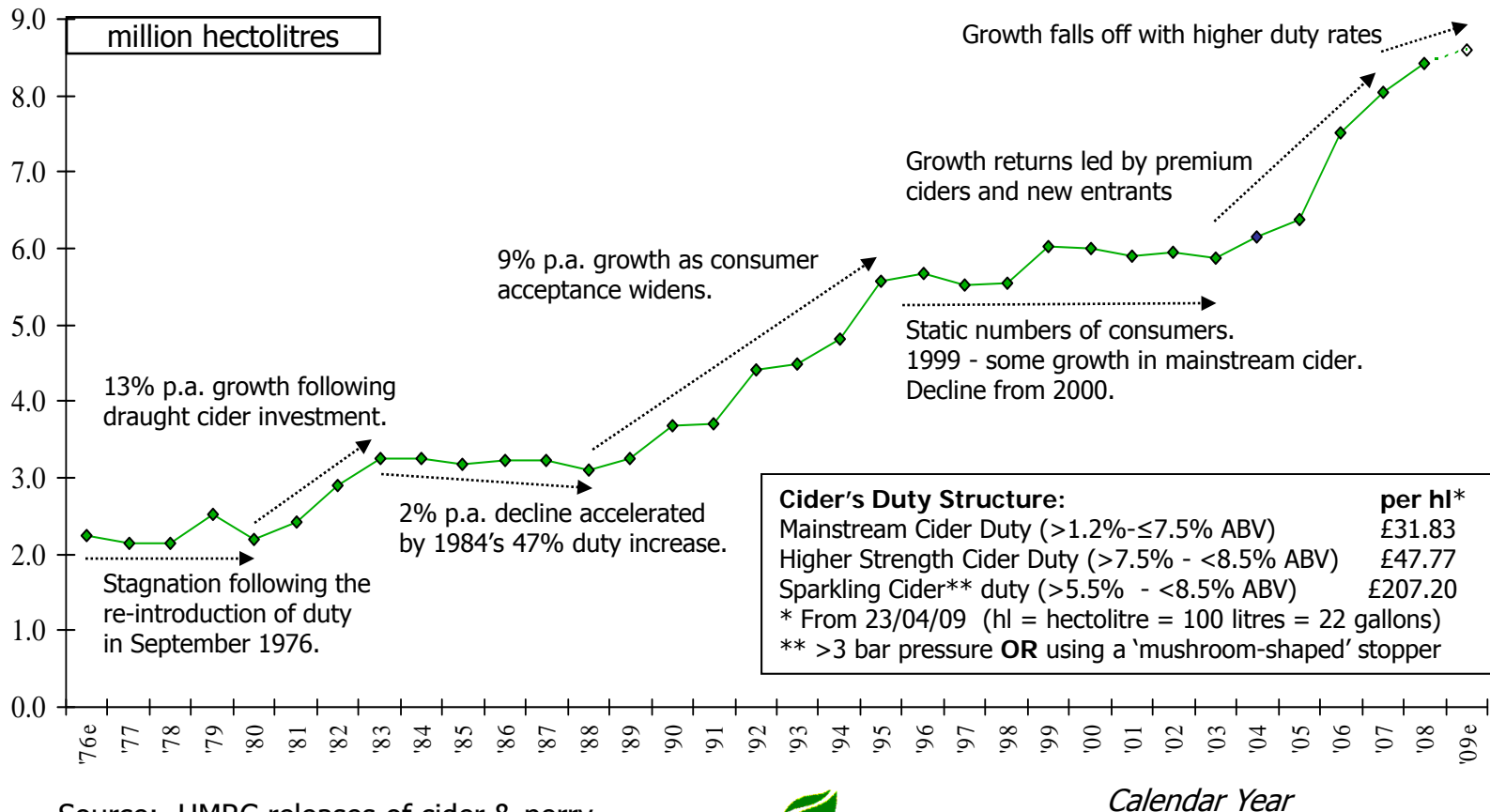


Development of the UK Cider & Perry Market

since the reintroduction of excise duty in September 1976



Source: HMRC releases of cider & perry

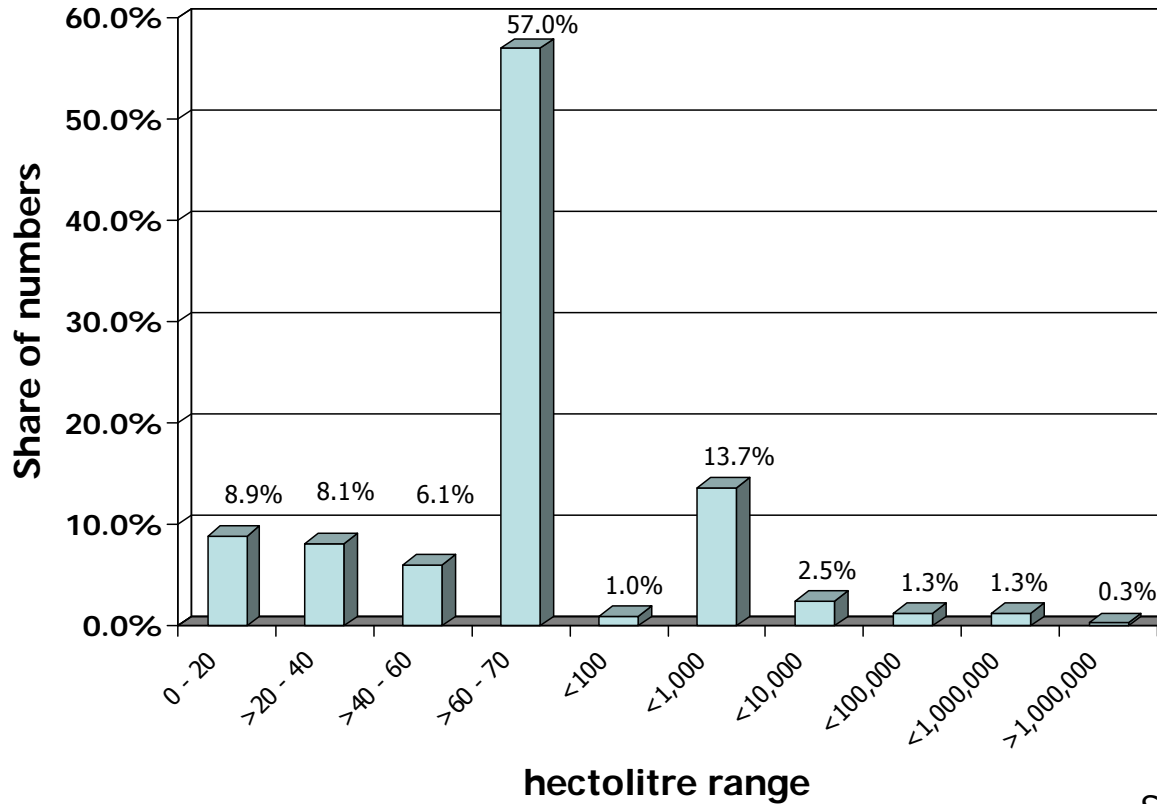
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of
CIDER MAKERS

Distribution of UK Cider Makers

Share of numbers in 2008 distributed by size of output

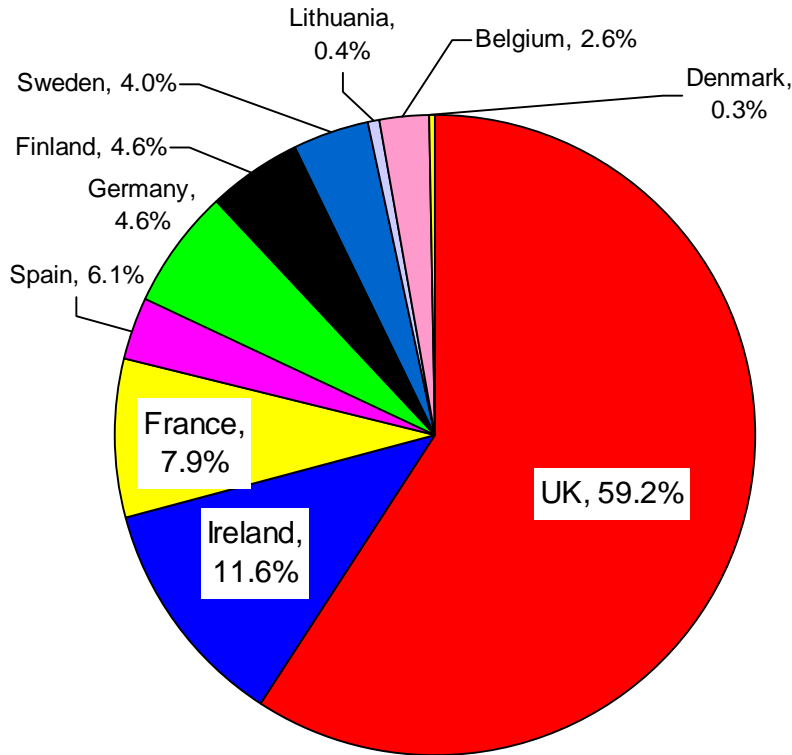


Source: NACM estimates

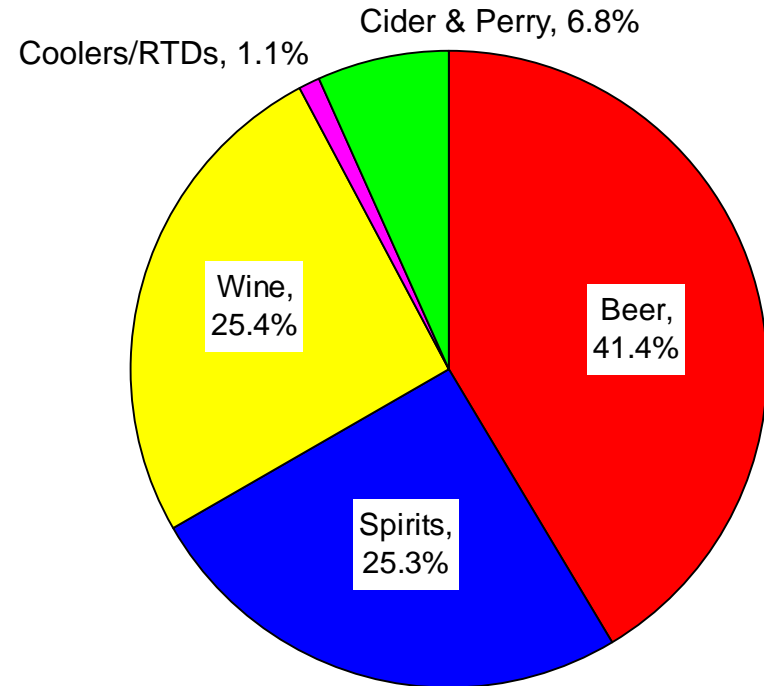


Cider, the EU & the UK Drinks Markets

1. Share of EU Sales Volume
2008



2. Share of UK Servings*
2008



Source: 1. AICV. 2. HMRC Releases

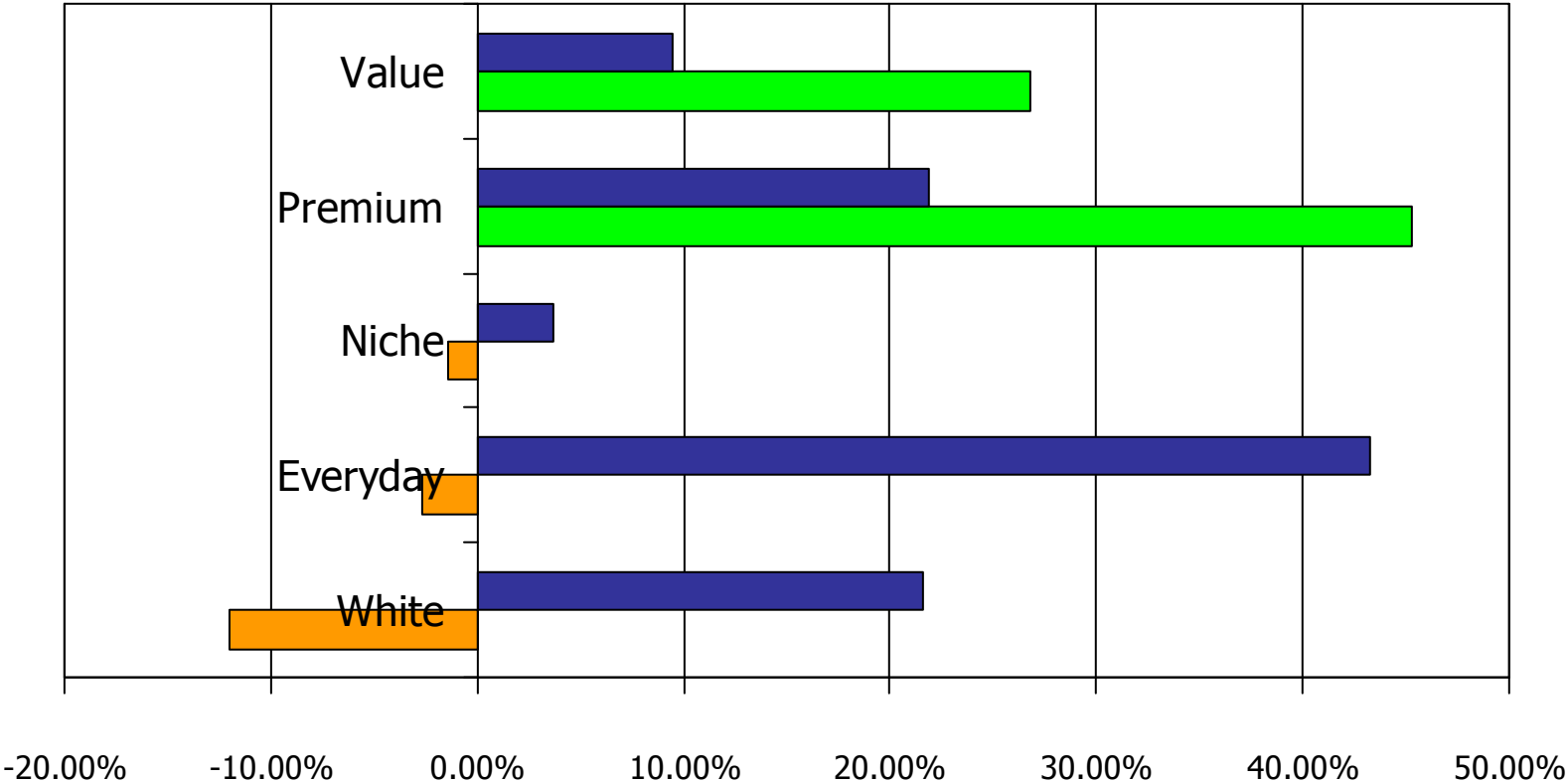
*Portman Group serving sizes: Beer, Coolers & Cider ½ pt, Wine 125ml, Spirits 25ml



Changes in Share of Cider Type

Volume - 12 months to March 2009 vs 2008

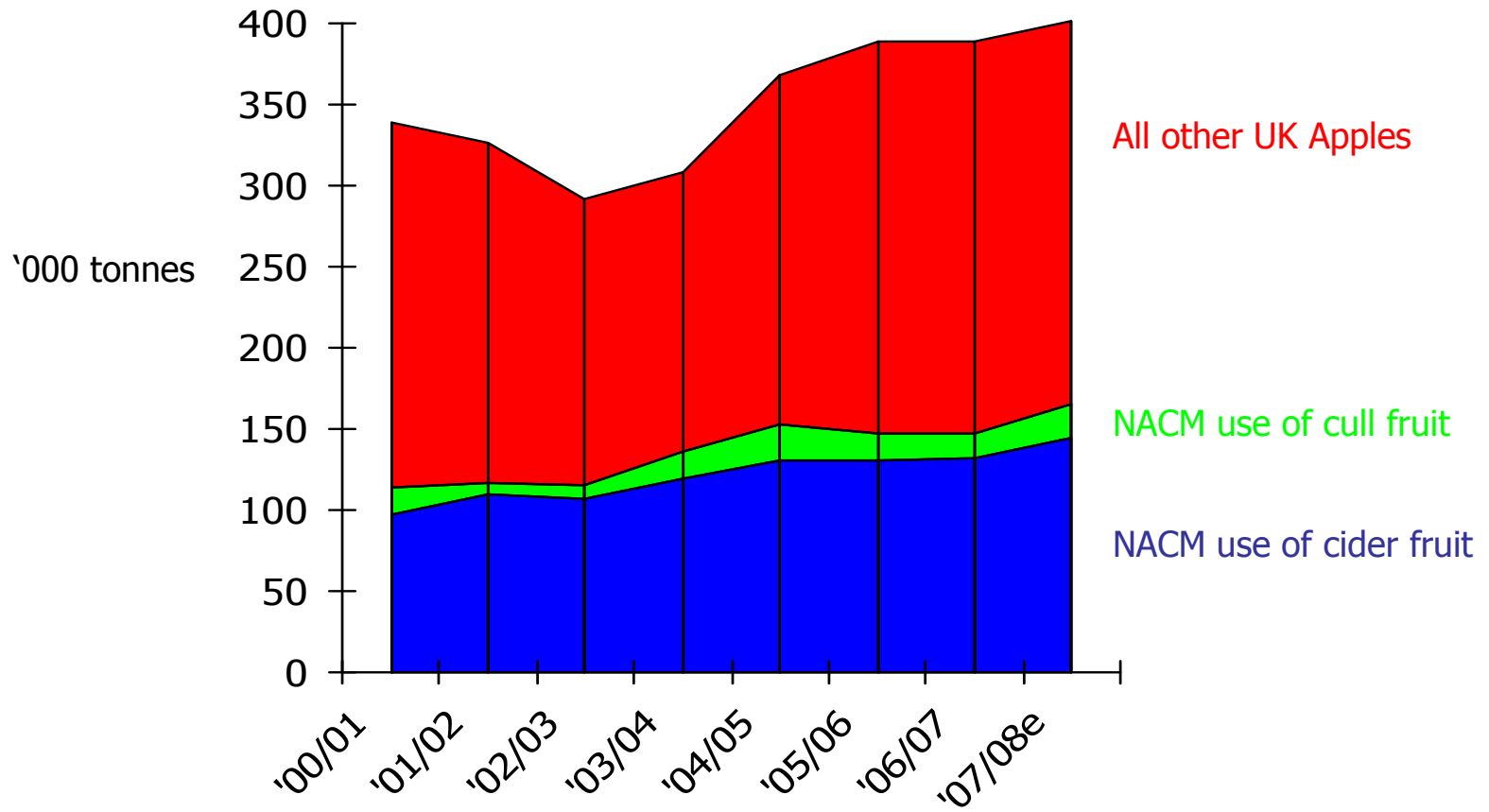
Share of Sector, 2009:  Change in Share, +ve / -ve:  



Source: IRI Off Trade only

NACM Members' Significance in UK Orcharding

Cider Industry's use of UK apples of all types

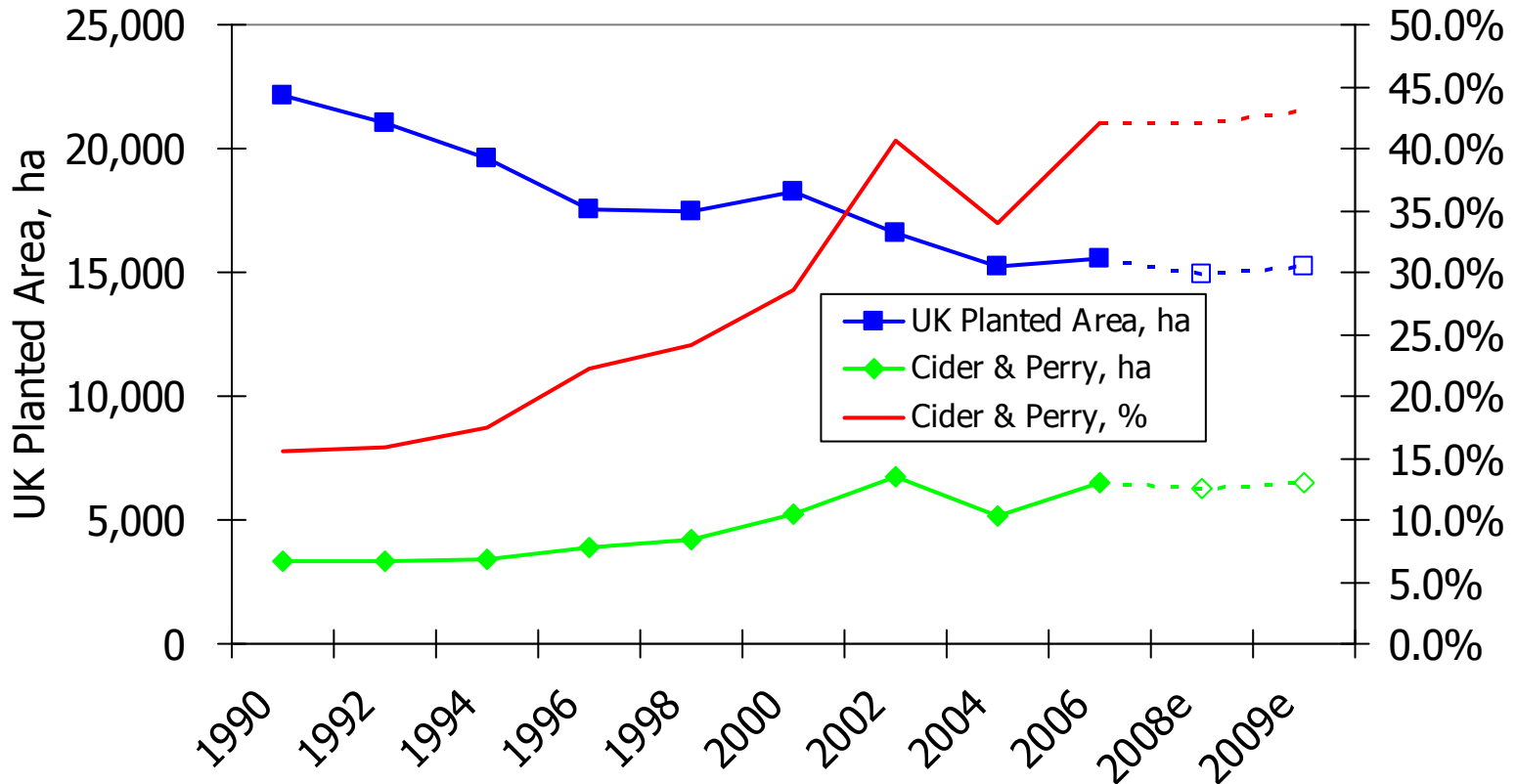


2 Year Moving Averages

Source: DEFRA and NACM



NACM Members Orcharding Investment



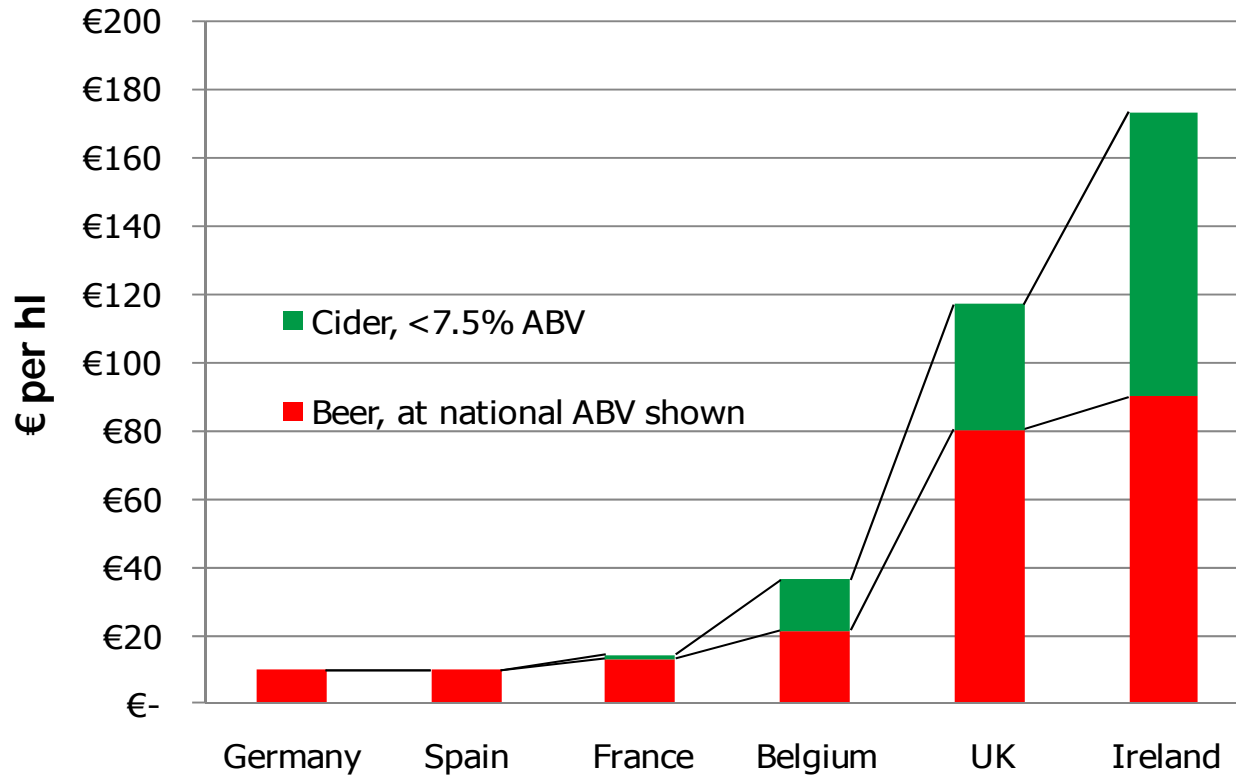
Sources: DEFRA with NACM estimates as shown



EU Comparisons

Excise Duty applied in significant Cider Making Member States - 2007

NB: duty rates are shown 'stacked' for simplicity



Average National ABVs: Germany 5% Spain 5% France 5% Belgium 5% UK 4.2% Ireland 4.5%

Source: National Treasuries

