

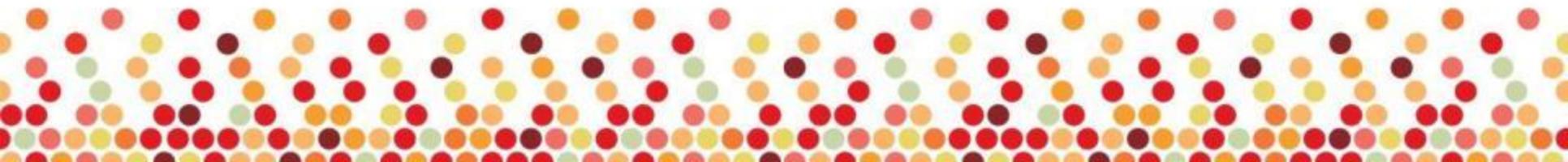




vineland
RESEARCH & INNOVATION CENTRE

Cider Innovation: Positioning Canadian cider for success

Amy Bowen, PhD



Opportunity

- Cider is the fastest growing alcoholic beverage segment in Ontario (LCBO)
- \$73M sales in Ontario in 2015
 - Only 27% captured by domestic labels; 6.5% craft

There is tremendous opportunity for Canadian cider to capture market share and grow the category



Understanding the cider consumer

Creating a competitive advantage

- Understanding the consumer and the preference drivers for cider will enable Canadian producers to grow market share and the industry
- Vineland's Consumer Insights expertise inform variety selection, product development, marketing and sales strategies



The strategy

How can a consumer research benefit your business?

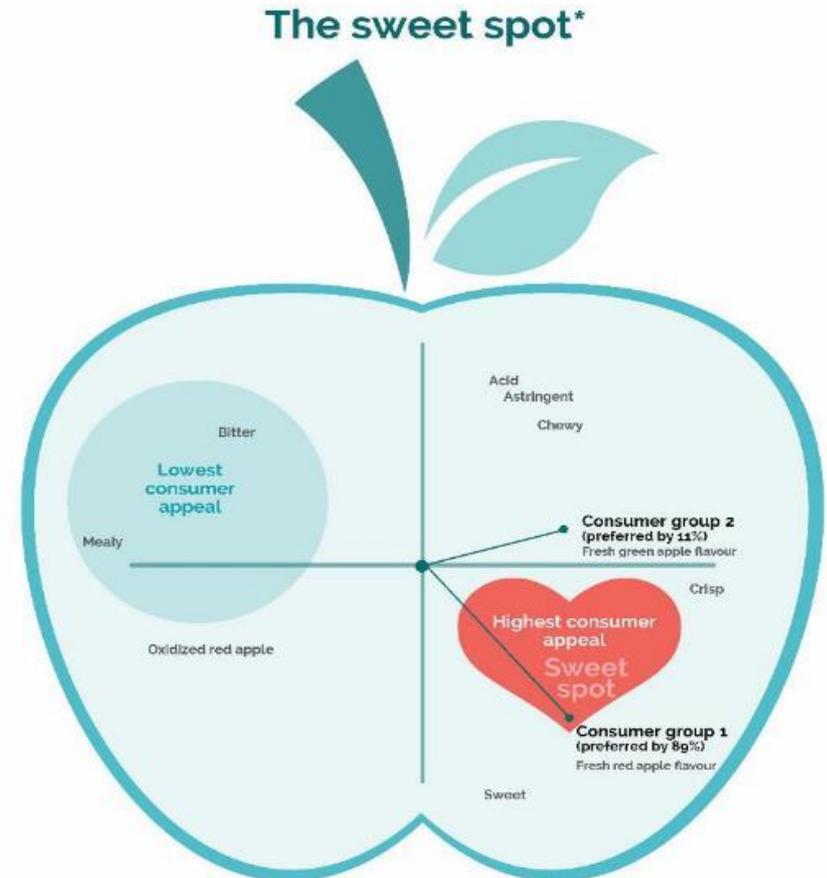
1. Understand Canadian cider consumers and characterize market segments (underway via survey of consumers)
2. Define sensory profile of current ciders
3. Create a cider PrefMap; how sensory attributes relate to preference drivers and consumer segments
4. Use the PrefMap to predict consumer liking of your ciders



The strategy

How can a PrefMap benefit your business?

- An example PrefMap that was developed by Vineland for apple breeding is pictured. It illustrates how sensory attributes are mapped and integrated consumer data informs us on what attributes drive liking and enables us to predict consumer liking of new products
- **The PrefMap will enable the tracking of shifting consumer preference as cider styles evolve**



*Simplified representation of consumer preferences of 70 apple varieties tested.

Our proposal

- Create a cider consortium open to all Canadian cideries
- Vineland will leverage industry funds and its investment into a large-scale research grant (i.e. Agricultural Adaptation Council) to cover the following:
 - Generate PrefMap for cider; include all major brands carried in the LCBO (Ontario)
 - Analyze 2 ciders per member; data provided to member for its own use
 - Evaluate cider apple varieties in production trial at Vineland
 - “New” and “old world” varieties – 22 varieties planted in Vineland's evaluation block in 2016
 - Evaluate varieties for high density production



Benefits of membership

- As a member of the Canadian Cider Consortium, you will receive:
 - Full sensory profile of two of your own ciders (100% apple)
 - Comparison of your ciders (2) to Top 5 selling ciders at LCBO
 - Analysis of consumer segments for cider and where your two ciders fall
 - Research updates on Vineland cider evaluation orchard
- Members can also enlist Vineland to run additional products through the PrefMap on an on-going basis (cost recovery)
 - Can be used for product development; prioritize products based on predicted consumer liking
 - Sensory data can be used to inform marketing strategy

Proposed budget

March 1 – October 31, 2017

Activity	Description	Costs
PrefMap	Salaries	73,970
	Consumer panel	27,375
	Consumables	13,010
	Duty Travel	1,500
	Project administration	23,171
	Subtotal	\$139,026
Orchard	Salaries	3,370
	Consumables	7,500
	Duty travel	350
	Small equipment	3,000
	Project administration	2,844
		Subtotal
TOTAL		156,090

Cost to participate

- Craft cidery = \$5K
- Non-craft cidery = \$10K
- *Non-members = ~\$15K

*Non-members fees will be full cost recovery and cannot participate until 2018

For more information or to join the consortium, contact

Amy Bowen, Ph.D.

Research Program Leader, Consumer Insights

amy.bowen@vinelandresearch.com

905-562-0320 ext.805

vinelandresearch.com



@vinelandrsrch



VinelandResearch

Growing Forward 2 
A federal-provincial-territorial initiative

 Ontario

Canada 