# CHINA MARKET READINESS: A SENSORY & COMMERCIAL CIDER TASTING REPORT

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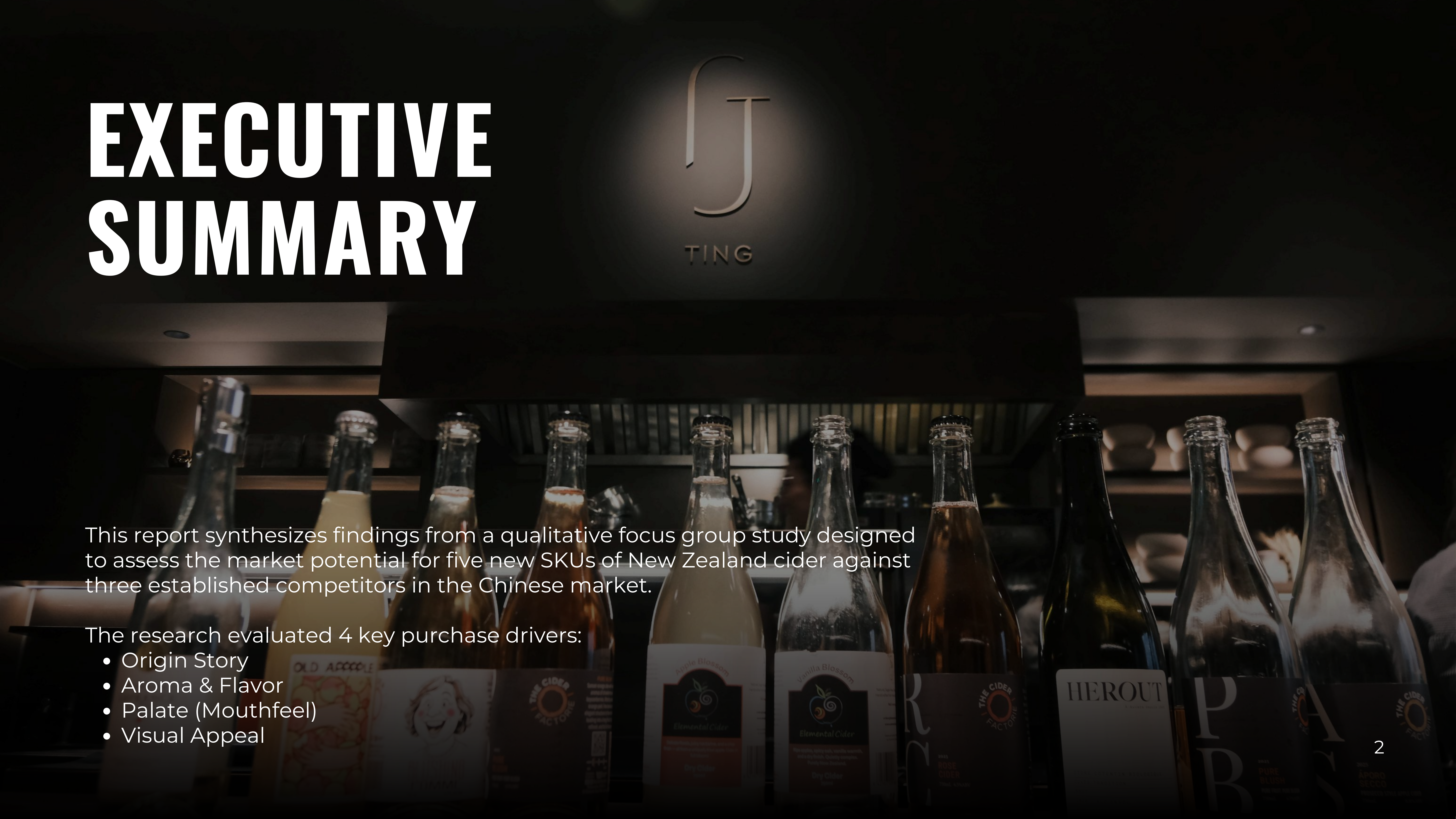
TRIBAL BRANDS ASIA




# EXECUTIVE SUMMARY

This report synthesizes findings from a qualitative focus group study designed to assess the market potential for five new SKUs of New Zealand cider against three established competitors in the Chinese market.

The research evaluated 4 key purchase drivers:

- Origin Story
- Aroma & Flavor
- Palate (Mouthfeel)
- Visual Appeal

# Core Conclusion

The New Zealand portfolio possesses a distinct and compelling premium potential, but its success is highly liquid-dependent and requires strategic positioning.

- The "New Zealand" origin story resonates powerfully with importers and on-premise channels for its purity and prestige but is less immediately impactful for retail/E-com consumers without clear narrative support.

- In blind tastings, our ciders were consistently described as "more aromatic," "more complex," and "cleaner" than competitors.

- **Critical Competitor Context:** The portfolio faced stiff comparison on price and sugar levels from **Competitor A (Zeffer)** and distinct stylistic polarization against **Competitors B & C (Maison Hérout & Xiaopu)**.

# Key Opportunity

**The "Clean" Advantage**

- To leverage perceived **"Natural Complexity"** as a premium differentiator, targeting the growing segment of Chinese consumers seeking **authentic, experiential, and sophisticated alcoholic beverages beyond beer and basic sweet ciders.**

- While French and Chinese competitors were polarizing (described by participants as "oxidized," "vinegar," or "stinky cheese" ), New Zealand ciders were consistently validated as the "Clean Natural" option—offering complexity without the faults.

# Key Challenge

Balancing the sophisticated, dry-to-semi-dry flavor profiles with the mainstream Chinese palate's preference for pronounced sweetness.

- **SKU 1 (Aporo Secco)** and **SKU 4 (Pure Blush)** emerged as the most immediately scalable.
- **Strategic Note:** SKU 1 calls for more sweetness (≈20g/L) but must avoid the "soda" perception associated with commercial competitors.
- SKU 5 (Vanilla Blossom) calls for more story-telling and visual appeal to communicate its premium liquid.

# Methodology

- **Context:** With only a small-batch first vintage available, conventional quantitative testing was not feasible. Instead, this qualitative, gatekeeper-centric design delivers the highest yield of commercial insight per sample.

- **Why Qualitative?** Sensory experiences are highly subjective, and each participant brings different industry experience and evaluation standards. Given the limited product samples and the lack of a unified quantitative baseline, attempting to score these subjective feelings numerically would fail to produce convincing or reliable data.

- **Comprehensive Coverage:** By convening buyers spanning from importers to on-premise and e-commerce, the research captures a balanced, end-to-end view of how the product will be evaluated across the full Chinese route-to-market—from prestige-building channels to volume drivers.

# Methodology

- **Evaluation Structure:** The two-phase blind-and-open structure is critical at this pre-packaging stage. It cleanly separates intrinsic liquid quality from branding impact, allowing for precise diagnosis of what requires liquid refinement versus what can be solved through packaging and storytelling.

- **Commercial Relevance:** Engaging actual channel gatekeepers—rather than general consumers—ensures that feedback reflects real-world commercial criteria, such as margin potential, shelf appeal, and category positioning.

- **Strategic Value:** Crucially, this methodology mirrors the actual evaluation process that products undergo when entering the Chinese market. It yields actionable insights that enable confident development decisions before committing to large-scale production.


# Methodology

- **Format & Analysis**
- **Participants**
- **Products**

# Format & Analysis

**Two-part focus group session**

- **Blind Tasting**
- **Open Tasting & Discussion**

**The report comes from thematic analysis of discussion transcripts, noting stark contrasts between blind and brand-aware feedback.**


# Participants

**18 representatives across key channels:**

- **Importer/Distributor (2)**
  Strategic, price-sensitive, focused on story and margin
- **Wholesale (3)**
  Volume-driven, understands regional preferences
- **On-Premise (Upscale Bar/Restaurant) (5)**
  Value experience, pairing, and premium narrative
- **E-commerce Lead (4)**
  Driven by visuals, trends, and click-through narrative
- **Modern Retail Buyer (4)**
  Focused on shelf appeal, rotation, and competitive positioning

# Products Evaluated

**Cider Apples NEW ZEALAND**
**x 6 SKUs**


**Competitor A**
**Zeffer - New Zealand**


**Competitor B**
**Maison Hérout - French**


**Competitor C**
**Xiaopu - Chinese**

# FINDINGS & ANALYSIS

- Origin Story & Brand Perception
- Aroma & Flavor Profile
- Palate & Mouthfeel
- Visual Appeal & Packaging

# Origin Story & Brand Perception

**Blind Phase**
Origin was a guessing game. Our ciders were often pegged as "European" (due to dryness) or "craft." for its flavour & aromatic complexity.

"European"

"craft"

**Open Phase**
"New Zealand" generated significant positive bias among Importer, On-Premise, and E-com reps. This narrative was seen as a premium tier above mainstream commercial ciders, aligning with the prestige of NZ wine and Manuka honey with key words including “Pristine”, “Sustainable”, “100% Pure” and “Adventure”.

“Sustainable”

“Pristine”

“Adventure”

“100% Pure”

# Origin Story & Brand Perception

**Importer/On-Premise**

**Excited**
Saw clear story-telling potential for high-margin positioning.

**E-commerce**

**Practical**
"The story is great, but the bottle must stop the scroll first." (E-com Lead).

**Retail/Wholesale**

**Pragmatic**
Questioned if the origin premium could be communicated quickly enough on a crowded shelf.

**Vs. Competitors**

- Our story was judged as more **authentic** and **niche** than Competitor A & B, and more focused on nature than the "heritage & tradition" story of the French one. The **“New Varietal” story** also sparks interest and calls on opportunity for further story telling.
- **The "French" Reality Check:** While the concept of "French Cider" carries prestige, the actual liquid (Competitor B) was polarizing. Participants described the French competitor as smelling like **"blue cheese"** or **"sour beer."**
- ***Strategic Opening:*** This fragility in the French reputation allows NZ to own the **"Flawless Premium"** position—offering the sophistication of the Old World without the "funky" off-notes.

# Aroma & Flavor Profile

**Blind Phase Consensus**
Our SKUs were consistently described as having "cleaner," "more authentic fruit," and "less sugary-sweet" aromas compared to competitors.

cleaner

more authentic fruit

less sugary-sweet

**Sweetness Strategy & The "Sprite Trap**

- All groups noted that the Chinese market, especially outside tier-1 cities, has a high sweetness expectation. Our drier profiles, while appreciated, were seen as needing education or specific occasions (e.g., food pairing).
- **Warning:** Participants explicitly warned against becoming **"Little Sweet Water"** (a term for cheap entry-level wines). We must increase sugar but maintain high acidity/tannin to avoid the "soda" comparison that hurts Competitor A.

# Aroma & Flavor Profile

**Vs. Competitors**

**Key Differentiator – Complexity vs. Approachability:**

- SKU 5 (Vanilla Blossom) and SKU 6 (Apple Blossom) were praised by On-Premise for "complexity" and "yeasty notes," though Retail predicted they were "too challenging" for the mass market.
- SKU 1 (Aporo Secco) and SKU 4 (Pure Blush) were universal favorites, bridging the gap between premium and popular.

**Competitor Flaws Identified:**

- **Competitor A (Zeffer):** Described by multiple participants as **"Sprite"** or **"commercial candy water"**.
- **Competitors B & C (French/Chinese):** Described as **"vinegar", "oxidized"** and **"funky"**.

# Palate & Mouthfeel

- **Clear Strength Identified:** Our ciders had a "crisp," "complexity," and "clean finish" that was highly valued, especially by On-Premise reps for food pairing (seafood, spicy cuisine).
- **The "Clean" vs. "Wild" Contrast:**
  - This profile contrasted sharply with the "wild/funky" nature of the French and Chinese competitors.
  - Participants noted the NZ ciders felt "safe" and "pure" versus the "wild ale" or "rotten apple" notes found in the natural competitors.
- **Carbonation & Body:** The slightly higher, finer carbonation in our products was seen as premium and refreshing.
- **Astringency Management:** The subtle tannic structure in SKU 5 was divisive—a positive for wine-like sophistication ("for a cider connoisseur"), but a potential barrier for the casual drinker.
- **ABV Perception:**
  - In the open phase, Wholesaler and Retail noted that the 8% abv. in SKU1 (Aporo Secco) may put the SKU at a disadvantage as the market is trending towards lower alcohol beverages; noting that mainstream beer within Chinese market averages around 3% and cider is often perceived as a lower-alcohol alternative to wine.

crisp

complexity

clean finish

safe

pure

# Visual Appeal & Packaging

- **Bottle Design:**
  1. **On-Premise**： Our contemporary, clean-label design (Cider Factorie) was highly praised by On-Premise channels for its modern, premium feel; On-Premise reps noted the ‘family’ look across the brand and appreciate the story in SKU3 (Blushing Pomme) in a hand-selling scenario.
  2. **Retail, E-Com and Wholeseller:** However, for Retail, E-Com and Wholeseller channels, the label calls for further story telling on variety and origin to justify its higher pricing.
  3. **All groups:** called for more comtemporary and premium branding for SKU 5 and 6 (Elemental Cider), noting the labels look “busy” and some noted “dated”.

- **Color Clarity:** The brilliant, **natural-looking color** of our ciders (especially SKU 4 Pure Blush) was a major win in the open tasting, reinforcing the "pure" narrative. In blind, some noted that SKU 1 (Aporo Secco) may be too pale.

- **Competitor Benchmark:** Competitor B's packaging (understated, traditional) was seen as more premium but in a "classic" way. Our design was perceived as "modern premium.", however On-Premise and Wholesale reps recommended using sparkling wine closure instead of crown cap to support the “premium” image.

- **Critical Feedback:** Label information must include key selling points prominently: "Made from 100% NZ Apples," “New Variety” and "Traditional Method".

# CONCLUSION & STRATEGIC RECOMMENDATIONS

The New Zealand ciders possess a strong foundation of liquid quality, with a clean, complex flavor profile that stands apart in the market. To secure the target $20+ positioning, this strength must be strategically enhanced through three key refinements:

- **Taste Alignment**
- **Brand Communication**
- **Value Positioning**

By implementing these focused enhancements, we can effectively translate the intrinsic product quality into compelling market-ready value.

# Taste Alignment


The dry profile requires careful adjustment toward a more fruit-forward sweetness to align with local preferences while preserving its signature crispness.

# Brand Communication

The packaging and branding must be elevated to fully convey the premium narrative. Critically, the unique "new varietal" story of the ciders is currently absent and must become a central visual and copy element on the label.

# Value Positioning

The higher alcohol content should be framed as a mark of richer flavor and sophistication, clearly justifying its premium occasion versus sessionable commercial ciders.

By implementing these focused enhancements, we can effectively translate the intrinsic product quality into compelling market-ready value.