THE DEFINITIVE RANKING OF THE WORLD'S MILLION-CASE SPIRITS BRANDS 2012

The millionaires' club

Drinks INTERNATIONAL
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WELCOME TO THE CLUB

There are clubs for ladies, for gentlemen, the gentry and the socially sedentary. Clubs where handshakes, back-slaps and ridiculous blazers maintain a cosy elitism. The Millionaires' Club is not one of these clubs. Here we favour meritocracy over cronyism – if a spirits or liqueur brand sells a million 9-litre cases it's in, if it doesn't, it's out.

This year the revolving door has welcomed more brands than it has ejected, with membership now numbering 180. We have a slew of novice Millionaires – affirmation to burgeoning brands that if you get the proposition and market right, the million-case mark is eminently achievable.

Of the newcomers to Millionaire status there's La Martiniquaise's Poliakov vodka, which inched its way past the million-case mark, presumably in the very last knockings of 2011. Then you have Cîroc which, through P Diddy's notoriety and Diageo's know-how, managed to pole-vault nearly 50 of its competitors to debut at 132.

The global analysts at Euromonitor International have also unearthed some new names. There are those that have quietly amassed sales but been shy up to now about opening their ledgers. For those maintaining a non-declaration policy, the arrival of the Philippines' Emperador to the list should dispense with the need for rhetoric.

The brand debuted at number four in the list and simultaneously announced itself to the drinks world as the number-one selling brandy.

Glenfiddich's advancement is also worth a column inch. The Speyside malt is somewhat of an avant-garde figure among the 100 or so scotch distilleries that, up to now, might have resigned to thinking their place in life was in the narrow, not broad market.

With the likes of The Glenlivet poised a few hundred thousand cases short of a million, Glenfiddich may be the pioneer, but it won't be the single single malt in the list for long.

The trapdoor has claimed its victims too. This year's key absentee is Stock Spirits' Prestige vodka, a brand that thrust on to the scene last year after 400% growth in 2010. But let's not dwell on the fallen. Let's celebrate the class of 2012. Welcome to The Millionaires' Club.

Hamish Smith
Supplement Editor

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With more than 800 analysts researching 205 countries, Euromonitor International provides global strategic intelligence on industries, countries and consumers. We publish internationally comparable statistics, market research focusing on industry trends and opportunities, as well as news analysis from industry experts. Our global information system, Passport, is used by the world's leading alcoholic drinks companies for a stronger understanding of global markets and the strategic business planning process. We offer a complete picture of the commercial environment by monitoring markets, related industries, operating conditions and consumer trends. As a fast moving consumer goods research house, we understand the dynamics of the consumer market and, with more than 35 years' experience, have unrivalled expertise in this sector.

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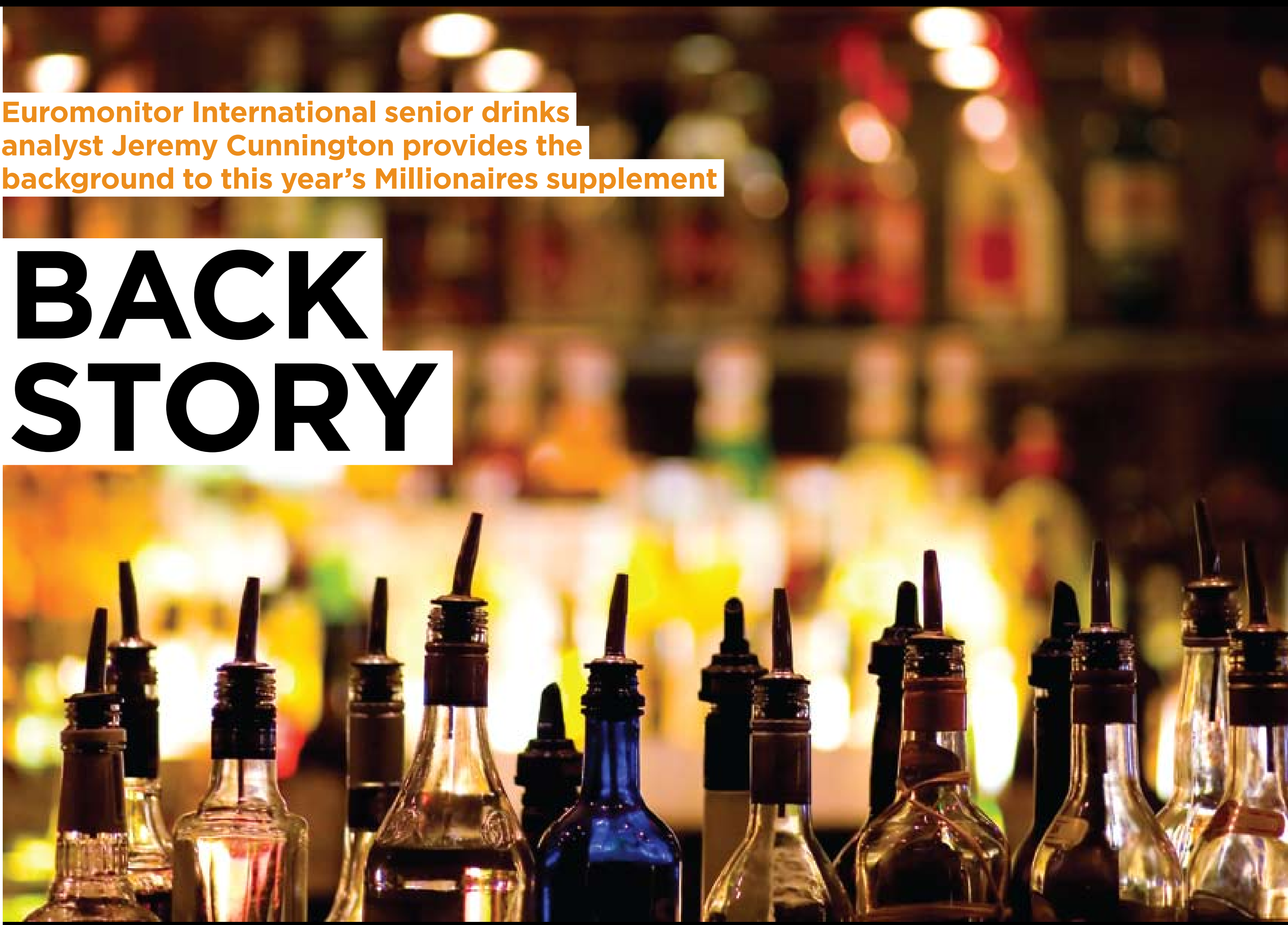
Euromonitor International senior drinks analyst Jeremy Cunnington provides the background to this year's Millionaires supplement

BACK STORY



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In Euromonitor International's fifth year of carrying out the research for *The Millionaires' Club*, the 2012 rankings (2011 sales) saw another record in terms of numbers of brands in the list, with 180. And this is despite a number of brands dropping out due to fluctuations in the market.

The list continues to broaden and deepen its spread, with the first ever brand from Kazakhstan (Haoma) making an entrance, as well as the first single malt scotch, Glenfiddich.

For the first time we have gained an insight into the size and breadth of the Chinese baijiu market, with four brands having taken part this year. Yet these baijus' combined volume sales of more than 20 million cases, only account for around 4% of the total amount of baijiu sold in China in 2011.

Baijiu
456m cases

This year's list also saw a tie in terms of companies with the most Millionaire brands – both Pernod Ricard and United Spirits boast 22. Pernod Ricard saw its number increase by one with the addition of its local Brazilian vodka, Orloff, while United Spirits added two – a new gin in Carew Dry and a more premium brandy, McDowell's VSOP.

> ***"For the first time we have gained insight into the size and breadth of the Chinese baijiu market, with four brands taking part"***

United Spirits, however, did suffer the loss of its position of having the world's leading whisky brand when its Bagpiper brand was overtaken by its stablemate McDowell's and, more importantly, Allied Blenders & Distillers' Officer's Choice brand.

Brandy/ Cognac
151m cases

Diageo remains the third biggest company in terms of number of brands, seeing its total rise by two to 16. One of these came about through the acquisition of Turkish giant Mey Içki, which gave the company the Yeni Raki brand. The other addition, the super-premium Cîroc vodka was the result of organic growth.

Local brands increased

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Vodka
421m cases

their domination of the list, accounting for 101 brands (up from 93 last year), and demonstrating that the vast majority of spirits are still consumed in their country of origin.

The number of global brands increased to 60, although overall spirits volumes grew by 2% in 2011. The number of regional brands fell to 19 as several, including Castillo, dropped out of the list.

Cachaça
111m cases (estimated)

In terms of the largest categories, both vodka and whiskies dominate, with a combined total of 100 Millionaire brands between them. Vodka is slightly ahead with 52.

Apart from these two spirits, no other category has more than 20 brands in the list. Rum is the next highest with 14, followed by brandy with 11.

Vodka's number of million-case selling brands can be attributed to its ease of production and the fact that its lack of taste complexity makes it very popular among consumers around the world. Hence, not only is there vodka produced in the traditional vodka-consuming markets of eastern Europe, but also in many western European countries, the US, India, Brazil and Kazakhstan.

Whiskies
302m cases

POLARISATION AND PREMIUMISATION

There are signs of a polarising market, especially in mature 'western' markets. There is also a strong hint of premiumisation with the double-digit growth of super-premium vodkas such as Diageo's Cîroc and Nolet's Ketel One. In gin, the brands that have performed best (Bombay, Beefeater and Tanqueray) are those with strong premium or super-premium variants, while the standard and economy brands such as Seagram's and Gordon's performed poorly.

In addition we see the entry of the first-ever single malt scotch, William Grant's Glenfiddich brand, key growth markets of which are the US and Asia. Increasing demand for premium cognac variants in Asia has driven that category's growth.

By contrast there is still a demand in 'western' markets for cheaper brands, as witnessed by the growth of economy vodkas such as UV and Svedka.

Premiumisation can be further seen in emerging markets with the strong growth of more premium international spirits brands and categories, such as in vodka and blended scotch, at the expense of cheaper local brands. Consequently, brands such as Smirnoff, Absolut and Skyy in Brazil, and whiskies in Poland led by Ballantine's, have grown rapidly, hitting volume sales of the Pirassununga 51 cachaça brand in Brazil and a large number of local Polish vodka brands.

Soju/ Shochu
222m cases (estimated)

However, this does not mean that cheaper domestic/local brands in emerging markets are not performing. This year's list has seen quite possibly the largest actual increase in the history of the Millionaires' Club with the Philippine Emperador brandy more than doubling its volumes and increasing its sales by more than 10 million 9-litre cases.

Gin
60m cases

In India, it is still the cheap local brands that drive growth of this thriving market, although international brands, particularly in blended scotch, are performing well.

BRIGHT FUTURE

With many of the emerging market economies expected to continue to grow and help raise the prosperity of many consumers, the demand for higher quality products will offer opportunities for not just premium international spirits, but also more premium local spirits variants (such as McDowell's VSOP brandy in India). It is interesting to note that many of Pernod Ricard's 2011 local Indian spirits launches were for more premium variants of its local brands in the country.

Rum
165m cases

However, even with these trends there will still be huge demand for the cheaper local products as the majority of these countries' populations will only be able to afford these products for the foreseeable future.

Liqueurs
100m cases

Yet, at the same time as emerging markets are offering great opportunities for growth for international spirits brands and their owners, the mature core markets should not be overlooked.

Not only do these markets account for the majority of the brands' volumes, revenues and profits, they also offer great opportunities for growth at different price points, as witnessed by the strong gains in certain categories, such as US vodka, which offers opportunities at the economy end with brands such as UV vodka and the super-premium end with Cîroc.

Tequila/ Mezcal
25m cases

Even static or declining markets in these areas can offer opportunities, as witnessed by the continued success of Campari's Aperol bitters brand (+31%) in the declining bitters markets of Italy and Germany. The brand is also starting to take off in other mature European markets such as Austria and Switzerland.

Thus, despite continued tough economic conditions in certain markets and an uncertain global outlook there is still much to be positive about for spirits producers for 2012 and beyond. ■

The Millionaires' Club explained

The Millionaires' Club is a ranking of spirits and liqueurs brands with sales (shipments) of 1 million 9-litre cases or more. Brands are classified under Domestic/Local (simplified to Local in the lists) where 90% or more of volumes are sold in a particular country; Regional where 80% or more of volumes are sold in a particular region; and Global in cases where sales are in at least two regions and no more than 80% in any one region. Brands' classification can change in exceptional circumstances at the discretion of *Drinks International* and Euromonitor International. Known Millionaire brands that failed to provide figures were placed at the foot of their respective list based on their 2010 sales. N/a denotes that their 2011 sales were not available.

FULL LISTING

The complete low-down on all movement in the Millionaire's Club year on year

Full *Listing*

VOLUME: MILLIONS OF 9-LITRE CASES

BRAND		OWNER	CATEGORY	2007	2008	2009	2010	2011	% +/-	STATUS
1	— **Jinro**	Jinro	Soju	69.84	75.99	63.98	64.28	61.38	**-4.5**	Local
2	— **Smirnoff**	Diageo	Vodka	24.30	25.70	24.40	24.40	24.70	**1.2**	Global
3	— **Lotte Liquor**	Lotte Liquor	Soju	19.00	19.90	21.20	22.60	23.90	**5.5**	Local
4	▲ **Emperador**	Alliance Global Group	Brandy	7.30	7.20	6.30	9.60	20.10	**109.4**	Local
5	— **Bacardi**	Bacardi	Rum	19.90	19.64	18.60	19.28	19.56	**1.5**	Global
6	— **Tanduay**	Tanduay Distillers	Rum	14.43	16.29	16.92	18.36	18.71	**1.9**	Local
7	▼ **Pirassununga 51**	Companhia Müller de Bebidas	Cachaça	21.50	21.98	19.50	19.50	18.60	**-4.6**	Global
8	▲ **Johnnie Walker**	Diageo	Whisky-scotch	15.80	16.30	15.30	16.90	18.00	**6.5**	Global
9	▼ **Officer's Choice**	Allied Blenders & Distillers	Whisky-Indian	6.60	9.50	12.00	16.00	16.53	**3.3**	Local
10	— **McDowell's No.1**	United Spirits	Whisky-Indian	11.46	13.39	13.52	14.32	16.08	**12.3**	Local
11	▼ **Bagpiper**	United Spirits	Whisky-Indian	13.95	15.41	16.26	16.39	15.98	**-2.5**	Local
12	▼ **McDowell's No.1 Celebration**	United Spirits	Rum	7.63	9.67	11.17	13.89	15.63	**12.5**	Local
13	▲ **Red Star Er Guo Tou**	Beijing Red Star Co	Baijiu	6.02	7.19	8.89	10.94	13.68	**25.0**	Local
14	▲ **Royal Stag**	Pernod Ricard	Whisky-Indian	5.63	6.76	8.40	10.39	12.49	**20.2**	Local
15	▼ **McDowell's No.1**	United Spirits	Brandy-Indian	7.64	7.53	9.22	11.54	11.72	**1.6**	Local
16	— **Absolut**	Pernod Ricard	Vodka	10.73	10.73	10.03	10.90	11.21	**2.8**	Global
17	▲ **Old Tavern**	United Spirits	Whisky-Indian	2.84	4.77	6.84	9.08	11.07	**21.9**	Local
18	▲ **Original Choice**	John Distilleries	Whisky-Indian	6.41	8.84	10.21	10.32	10.77	**4.4**	Local
19	▲ **Jack Daniel's**	Brown-Forman	Whiskey-US-Tennessee	9.33	9.51	9.57	9.95	10.58	**6.4**	Global
20	— **Pitú**	Engarrafamento Pitú	Cachaça	9.31	9.51	9.60	10.10	10.49	**3.9**	Global
21	▼ **Khlibniy Dar**	Bayadera Group	Vodka	3.57	6.63	10.20	12.30	9.35	**-24.0**	Local
22	▼ **Zelenaya Marka (Green Mark)**	CEDC	Vodka	8.10	11.97	11.25	10.85	9.30	**-14.3**	Global
23	▲ **Captain Morgan**	Diageo	Rum	7.80	8.30	8.80	9.00	9.20	**2.2**	Global
24	▲ **Velho Barreiro**	Tatuzinho	Cachaça	7.15	7.40	7.70	8.00	8.40	**5.0**	Global
25	▲ **Iichiko**	Sanwa Shurui	Shochu	9.88	9.14	8.74	8.32	8.16	**-1.9**	Local
26	▼ **Nemiroff**	Nemiroff Ukrainian Vodka Company	Vodka	8.89	8.55	9.10	9.21	8.03	**-12.8**	Global
27	▼ **Khortytsa**	Khortytsa Distillery	Vodka	9.40	9.60	9.25	9.00	7.50	**-16.7**	Global
28	▲ **Bohae**	Bohae Brewery Co	Soju	8.50	8.20	8.20	7.60	7.40	**-2.6**	Local
29	▲ **Imperial Blue**	Pernod Ricard	Whisky-Indian	3.13	3.83	4.83	6.11	7.17	**17.3**	Local
30	▲ **Belenkaya**	SY Group	Vodka	2.04	2.25	2.81	4.92	7.07	**43.8**	Local
31	▼ **Baileys**	Diageo	Liqueurs	7.70	7.60	6.70	6.70	6.80	**1.5**	Global
32	▼ **Jägermeister**	Mast-Jägermeister	Bitters	6.32	6.41	6.41	6.58	6.77	**2.9**	Global
33	— **Pyat Ozer**	Alcohol Siberian Group	Vodka	6.04	6.50	6.10	6.30	6.60	**4.8**	Local
34	— **Ballantine's**	Pernod Ricard	Whisky-scotch	6.17	6.50	5.76	6.18	6.47	**4.7**	Global
35	▲ **Ricard**	Pernod Ricard	Anis	5.78	5.52	5.37	5.38	6.20	**15.2**	Global
36	▲ **Hayward's**	United Spirits	Whisky-Indian	2.31	2.77	4.06	4.65	6.16	**32.5**	Local
37	▲ **Jim Beam**	Beam	Whiskey-US-Bourbon	5.24	5.16	5.08	5.30	5.86	**10.6**	Global
38	▼ **Mansion House Brandy**	Tilaknagar Industries	Brandy-Indian	1.32	1.77	3.96	5.38	5.82	**8.2**	Local
39	— **Crown Royal**	Diageo	Whisky-Canadian	5.00	5.10	4.90	5.00	5.00	**0.0**	Global
40	— **Grant's**	William Grant & Sons	Whisky-scotch	4.79	4.97	4.78	4.99	4.97	**-0.4**	Global

▶

Full *Listing*

VOLUME: MILLIONS OF 9-LITRE CASES

BRAND	OWNER	CATEGORY	2007	2008	2009	2010	2011	% +/-	STATUS
41 ▲ Kristall	Minsk Kristall RUP	Vodka	3.64	3.94	4.40	4.78	4.94	3.3	Local
42 ▲ Hennessy	LVMH	Cognac	4.74	4.49	4.25	4.65	4.93	6.0	Global
43 ▲ Chivas Regal	Pernod Ricard	Whisky-scotch	4.37	4.57	3.87	4.50	4.89	8.7	Global
44 ▼ J&B Rare	Diageo	Whisky-scotch	5.90	5.90	5.10	4.80	4.80	0.0	Global
45 ▲ Honey Bee	United Spirits	Brandy-Indian	2.20	2.82	3.60	4.37	4.75	8.7	Local
46 ▲ Fernet Branca	Fratelli Branca Distillerie	Bitters	3.12	3.28	3.31	3.85	4.63	20.3	Global
47 ▼ Czysta de Luxe (ZG)	Stock Spirits Group	Vodka	0.08	1.87	5.39	6.40	4.60	-28.1	Local
48 ▼ Director's Special	United Spirits	Whisky-Indian	3.69	4.00	4.39	4.54	4.52	-0.4	Local
49 ▲ Krupnik	Belvédère	Vodka	–	–	–	1.90	4.5	136.8	Local
50 ▲ 8PM	Radico Khaitan	Whisky-Indian	4.16	3.76	3.18	3.94	4.32	9.6	Local
51 ▼ Gordon's	Diageo	Gin	4.50	4.30	4.20	4.30	4.30	0.0	Global
52 ▼ De Kuyper range	Koninklijke De Kuyper/Beam	Liqueurs	4.90	4.74	4.40	4.32	4.21	-2.6	Global
53 ▲ Mian Zhu Jiu	Sichuan Jian Nan Chun (Group)	Baijiu	–	–	3.45	3.87	4.15	7.2	Local
54 ▲ Jingzhi Baigan	Shandong JingZhi Distillery	Baijiu	–	–	–	–	4.12	0.0	Local
55 ▲ Yeni Raki	Diageo	Raki	–	–	3.40	3.90	4.10	5.1	Local
56 ▲ Havana Club	Pernod Ricard	Rum	3.00	3.40	3.28	3.77	3.84	1.9	Global
57 ▼ Grey Goose	Bacardi	Vodka	3.60	3.60	3.46	3.65	3.79	3.8	Global
58 ▲ Jameson	Pernod Ricard	Whiskey-Irish	2.48	2.73	2.74	3.17	3.78	19.2	Global
59 ▼ Svedka	Constellation Brands	Vodka	1.53	2.10	2.90	3.41	3.69	8.2	Local
60 ▼ Malibu	Pernod Ricard	Liqueurs	3.63	3.70	3.23	3.40	3.68	8.2	Global
61 ▼ Kanoka	Asahi Breweries	Shochu	3.44	3.56	3.66	3.84	3.59	-6.5	Local
62 ▼ Dreher	Gruppo Campari	Brandy-Brazilian	3.75	3.60	3.45	3.50	3.57	2.0	Local
63 ▲ Blenders Pride	Pernod Ricard	Whisky-Indian	1.51	1.92	2.31	2.82	3.46	22.7	Local
64 ▼ Skyy	Gruppo Campari	Vodka	2.90	3.15	3.25	3.35	3.45	3.0	Global
65 ▼ Stolichnaya	SPI Group	Vodka	3.33	3.20	3.00	3.12	3.32	6.4	Global
66 — Old Admiral	Radico Khaitan	Brandy-Indian	1.40	1.40	1.81	2.99	3.24	8.4	Local
67 ▼ Dewar's	Bacardi	Whisky-scotch	3.50	3.41	3.24	3.27	3.19	-2.4	Global
68 ▼ Finlandia	Brown Forman	Vodka	2.75	3.05	3.01	2.96	3.10	4.7	Global
69 ▲ Gold Riband	United Spirits	Whisky-Indian	1.63	1.84	2.68	2.25	3.07	36.4	Local
70 ▼ Sauza	Beam	Tequila	3.21	3.13	2.63	3.02	3.01	-0.3	Global
71 ▼ Daigoro	Asahi Breweries	Shochu	4.66	4.44	4.17	3.74	2.93	-21.7	Local
72 ▼ Director's Special Black	United Spirits	Whisky-Indian	1.34	1.77	2.03	2.88	2.92	1.4	Local
73 ▲ McDowell's Green Label	United Spirits	Whisky-Indian	1.83	1.70	1.99	2.53	2.92	15.4	Local
74 ▲ William Peel	Belvédère	Whisky-scotch	1.78	2.12	2.35	2.50	2.90	16.0	Local
75 ▼ Campari	Gruppo Campari	Bitters	2.93	2.93	2.70	2.80	2.87	2.5	Global
76 ▼ Sobieski	Belvédère	Vodka	2.5	2.75	3.00	3.05	2.80	-8.2	Global
77 ▼ Seagram's	Pernod Ricard	Gin	3.44	3.38	3.03	2.93	2.77	-5.5	Regional
78 — Russian Standard	Roust	Vodka	1.90	2.10	2.20	2.50	2.60	4.0	Global
79 ▲ Aperol	Gruppo Campari	Bitters	1.15	1.30	1.65	1.95	2.55	30.8	Regional
80 ▼ Kakubin	Suntory	Whisky-Japanese	1.59	1.91	2.18	2.79	2.50	-10.4	Regional

Full *Listing*

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BRAND	OWNER	CATEGORY	2007	2008	2009	2010	2011	% +/-	STATUS
81 ▼ Bell's	Diageo	Whisky-scotch	2.30	2.20	2.30	2.40	2.50	4.2	Global
82 ▲ Label 5	La Martiniquaise	Whisky-scotch	1.91	1.98	2.16	2.27	2.50	10.1	Global
83 ▲ Eristoff	Bacardi	Vodka	1.70	1.80	1.90	2.27	2.41	6.2	Global
84 ▼ Seagram's 7 Crown	Diageo	Whiskey-US	2.50	2.50	2.50	2.50	2.40	-4.0	Regional
85 ▼ Beefeater	Pernod Ricard	Gin	2.42	2.41	2.24	2.33	2.39	2.6	Global
86 ▼ Contessa	Radico Khaitan	Rum	2.08	2.20	2.56	2.37	2.36	-0.4	Local
87 ▲ Bombay	Bacardi	Gin	2.00	2.00	1.97	2.15	2.32	7.9	Global
88 ▲ William Lawson's	Bacardi	Whisky-scotch	1.30	1.50	1.59	1.69	2.29	35.5	Global
89 ▼ Kinmen Kaoliang	Kinmen Kaoliang Liquor	Baijiu	1.88	2.15	2.03	2.15	2.27	5.6	Local
90 ▼ Absolwent	CEDC	Vodka	4.12	4.18	3.70	2.80	2.20	-21.4	Local
91 ▲ Ketel One	Nolet Spirits	Vodka	1.88	1.90	1.90	2.00	2.20	10.0	Global
92 ▲ Istynna	Olimp Corp	Vodka	–	–	0.50	1.63	2.18	33.7	Local
93 ▼ Old Cask	United Spirits	Rum	1.28	1.72	2.21	2.11	2.15	1.9	Local
94 ▲ Magic Moments Vodka	Radico Khaitan	Vodka	0.25	0.58	0.86	1.82	2.15	18.1	Local
95 ▼ Glen's	Glen Catrine	Vodka	1.70	1.80	1.90	2.10	2.10	0.0	Local
96 ▼ Tanqueray	Diageo	Gin	2.20	2.10	2.00	2.00	2.10	5.0	Global
97 ▼ Black Velvet	Constellation Brands	Whisky-Canadian	1.91	1.96	2.04	2.07	2.08	0.5	Regional
98 ▲ Teacher's	Beam	Whisky-scotch	1.98	1.96	1.73	1.89	2.05	8.5	Global
99 ▲ Belalco	Belalco (Brest Likerovodochny Zavod)	Vodka	1.68	1.69	1.90	2.03	2.03	-0.3	Local
100 ▲ Old Port Rum	Amrut Distilleries	Rum	1.64	1.91	1.66	1.82	2.01	10.4	Local
101 ▼ Yamskaya	CEDC	Vodka	–	2.16	2.40	2.61	2.00	-23.4	Local
102 ▼ Parliament	CEDC	Vodka	2.70	3.08	2.50	2.40	2.00	-16.7	Regional
103 ▲ Lubelska	Stock Spirits Group	Liqueurs	0.29	0.50	0.60	1.50	2.00	33.3	Local
104 ▼ Southern Comfort	Brown-Forman	Liqueurs	2.48	2.38	2.23	2.14	1.97	-8.3	Global
105 ▲ Clan Campbell	Pernod Ricard	Whisky-scotch	1.64	1.72	1.76	1.76	1.96	11.4	Regional
106 ▼ Zhuravli	CEDC	Vodka	–	2.55	2.36	2.15	1.95	-9.3	Local
107 ▼ Canadian Club	Beam	Whisky-Canadian	2.04	1.96	1.89	1.92	1.93	0.5	Global
108 ▲ Muginoka	Suntory	Shochu	–	–	–	1.66	1.92	15.7	Local
109 — Patrón Tequila	Patrón Spirits	Tequila	1.60	1.73	1.74	1.76	1.88	6.5	Global
110 ▲ Martell	Pernod Ricard	Cognac	1.61	1.54	1.46	1.75	1.86	6.3	Global
111 ▲ Prime	Olimp Corp	Vodka	0.94	1.51	1.51	1.60	1.85	15.6	Local
112 — Black Nikka	Asahi Breweries	Whisky-Japanese	1.11	1.23	1.36	1.75	1.84	5.1	Regional
113 ▼ Montilla	Pernod Ricard	Rum	2.67	2.73	1.95	1.80	1.75	-2.8	Local
114 — Kahlúa	Pernod Ricard	Liqueurs	2.14	2.00	1.69	1.70	1.72	1.2	Global
115 ▼ 100 Pipers	Pernod Ricard	Whisky-scotch	2.50	2.25	2.03	1.73	1.71	-1.2	Global
116 ▼ White Mischief	United Spirits	Vodka	1.26	1.57	1.90	1.87	1.70	-9.0	Local
117 ▼ Cacique	Diageo	Rum	1.70	1.70	1.80	1.70	1.70	0.0	Regional
118 ▼ 1906	Stock Spirits Group	Vodka	0.74	0.83	1.39	1.70	1.70	0.0	Local
119 ▲ Aguardiente Nectar	Empresa de Licores de Cundinamarca	Aguardiente	1.37	1.31	1.39	1.51	1.70	12.3	Local
120 ▲ Hakata No Hana	Oenon Holdings Corp	Shochu	1.70	1.60	1.52	0.89	1.70	91.0	Local
121 ▼ Big Man	Oenon Holdings Corp	Shochu	–	2.53	2.43	2.11	1.69	-19.9	Local
122 ▲ Burnett's Vodka	Heaven Hill	Vodka	1.00	1.20	1.52	1.52	1.68	10.5	Local
123 ▲ Choya	Choya Umeshu Co	Liqueurs	–	–	–	–	1.67	0.0	Local
124 ▲ Haoma	Kokshetauminvody	Vodka	1.04	1.25	1.27	1.37	1.67	22.1	Local
125 ▼ Canadian Mist	Brown-Forman	Whisky-Canadian	1.91	1.87	1.84	1.75	1.66	-5.5	Local
126 ▼ Romanov	United Spirits	Vodka	0.98	1.17	1.25	1.59	1.63	2.5	Local
127 ▲ Madira XXX	Tilaknagar Industries	Rum	0.02	0.18	0.82	1.28	1.62	26.6	Local
128 — Buchanan's	Diageo	Whisky-scotch	1.60	1.50	1.30	1.40	1.60	14.3	Regional
129 ▼ Myagkov	SY Group	Vodka	2.41	1.23	1.37	1.58	1.59	0.9	Regional
130 ▲ Signature	United Spirits	Whisky-Indian	0.76	0.99	1.14	1.32	1.56	18.2	Local
131 ▼ Wyborowa	Pernod Ricard	Vodka	1.78	2.32	2.12	1.83	1.51	-17.5	Global
132 ▲ Cîroc	Diageo	Vodka	–	–	0.40	0.90	1.50	66.7	Local
133 ▼ Pridvinye	Vitebsky Likerovodochny Zavod	Vodka	1.17	1.33	1.43	1.42	1.48	4.4	Local
134 ▲ Three Olives	Proximo Spirits	Vodka	1.10	1.25	1.32	1.40	1.48	5.4	Local
135 ▼ Mugi Zakari	Oenon Holdings Corp	Shochu	0.36	0.96	1.60	1.78	1.45	-18.5	Local
136 ▼ Bagpiper Rum	United Spirits	Rum	–	–	0.99	1.45	1.45	0.0	Local
137 ▲ Pastis 51	Pernod Ricard	Anis	1.49	1.41	1.34	1.27	1.44	13.4	Regional
138 ▼ Zolodkowa Gorzka	Stock Spirits Group	Vodka	1.36	1.71	1.80	1.80	1.40	-22.2	Local
139 ▲ UV Vodka	Phillips Distilling	Vodka	0.51	0.66	0.85	1.06	1.40	32.7	Local
140 ▲ McDowell's VSOP	United Spirits	Brandy	–	–	0.03	0.64	1.40	118.8	Local
141 ▲ Klimgrad	Klimovichsky Likerovodochny Zavod	Vodka	1.94	2.02	1.71	1.16	1.37	17.7	Local
142 ▲ Sir Edward's	Bardinet	Whisky-scotch	1.27	1.05	1.09	1.19	1.35	13.4	Global
143 ▲ Royal Challenge	United Spirits	Whisky-Indian	1.17	1.29	1.27	1.16	1.35	16.4	Local

Full *Listing*

VOLUME: MILLIONS OF 9-LITRE CASES

BRAND	OWNER	CATEGORY	2007	2008	2009	2010	2011	% +/-	STATUS
144 ▲ **Courvoisier**	Beam	Cognac	1.17	1.19	1.02	1.20	1.34	**11.7**	Global
145 ▼ **Paul Masson Grande Amber**	Constellation Brands	Brandy-US	1.29	1.35	1.36	1.36	1.31	**-3.7**	Local
146 ▼ **Evan Williams**	Heaven Hill	Whiskey-US-bourbon	1.03	1.05	1.24	1.29	1.30	**0.8**	Local
147 ▲ **Amarula**	Distell Group	Liqueurs	1.08	1.08	1.10	1.20	1.30	**8.3**	Global
148 ▲ **Akvadiv**	Akvadiv	Vodka	1.19	1.46	1.24	1.21	1.30	**7.0**	Local
149 ▼ **Gorbatschow**	Henkell & Söhnlein	Vodka	1.46	1.09	1.27	1.40	1.28	**-8.6**	Local
150 ▲ **Radamir**	Gomelsky Likerodovochny Zavod	Vodka	1.26	1.33	1.30	1.20	1.24	**3.4**	Local
151 ▼ **Amaro Ramazzotti**	Pernod Ricard	Bitters	1.18	1.22	1.00	1.23	1.22	**-0.8**	Regional
152 ▼ **El Jimador**	Brown-Forman	Tequila	0.92	1.02	1.10	1.19	1.21	**1.4**	Local
153 ▼ **Gordon's**	Diageo	Vodka	1.30	1.30	1.30	1.30	1.20	**-7.7**	Regional
154 ▼ **Appleton Jamaica Rum**	Wray & Nephew	Rum	1.14	1.15	1.19	1.16	1.20	**3.5**	Global
155 ▲ **Maker's Mark**	Beam	Whiskey-US-bourbon	0.79	0.85	0.89	1.03	1.18	**14.6**	Local
156 ▼ **Christian Brothers**	Heaven Hill	Brandy-US	1.15	1.17	1.18	1.18	1.15	**-2.5**	Local
157 — **Clan MacGregor**	William Grant & Sons	Whisky-scotch	1.26	1.32	1.32	1.15	1.14	**-0.7**	Regional
158 ▲ **Nemanoff**	Grodneskyu Likerovodochny	Vodka	0.65	0.85	0.99	1.05	1.11	**5.2**	Local
159 ▼ **Bols**	CEDC	Vodka	1.67	1.85	1.85	1.60	1.10	**-31.3**	Regional
160 ▼ **Seagram's VO**	Diageo	Whisky-Canadian	1.30	1.30	1.20	1.10	1.10	**0.0**	Regional
161 ▼ **Slavyanskaya**	Jupiter OOO	Vodka	2.60	1.80	1.50	1.20	1.10	**-8.3**	Local
162 ▲ **Wild Turkey**	Gruppo Campari	Whiskey-US-bourbon	–	–	–	0.99	1.10	**11.1**	Global
163 ▲ **Capel**	Cooperativa Agricola Pisquera de Elqui	Pisco	1.32	1.37	1.11	1.07	1.08	**0.9**	Local
164 ▲ **Orloff**	Pernod Ricard	Vodka	–	–	–	1.02	1.08	**5.9**	Local
165 ▲ **Carew's Dry**	United Spirits	Gin	0.45	0.54	0.66	0.79	1.08	**36.7**	Local
166 ▲ **Silver Cup Brandy**	Amrut Distilleries	Brandy-Indian	0.79	1.42	0.86	0.66	1.06	**60.6**	Local
167 ▲ **Gosudarev Zakaz**	SY Group	Vodka	–	1.55	1.27	1.17	1.06	**-9.7**	Local
168 ▼ **Soplica**	CEDC	Vodka	1.29	1.47	1.40	1.32	1.05	**-20.5**	Regional
169 ▼ **DYC**	Beam	Whisky-Spanish	1.43	1.22	1.19	1.17	1.04	**-11.1**	Local
170 ▲ **Poliakov**	La Martiniquaise	Vodka	0.40	0.55	0.735	0.85	1.04	**22.4**	Global
171 ▼ **Zubrowka**	CEDC	Vodka	1.00	1.00	1.03	1.18	1.03	**-12.7**	Regional
172 ▲ **Glenfiddich**	William Grant & Sons	Whisky-single malt scotch	0.88	0.85	0.80	0.95	1.03	**7.8**	Global
173 ▼ **Starogardzka**	Belvédère	Vodka	2.85	3.01	2.00	1.50	1.02	**-32.0**	Local
174 ▼ **Luksusowa**	Pernod Ricard	Vodka	1.47	1.76	0.87	1.14	1.02	**-10.5**	Local
175 ▼ **Kamchatka**	Beam	Vodka	0.94	0.94	1.00	1.05	1.02	**-2.9**	Local
176 ▼ **John Exshaw**	United Spirits	Brandy-Indian	1.49	1.77	1.48	1.28	1.01	**-21.1**	Local
177 ▼ **Old Adventurer**	United Spirits	Rum	1.12	1.20	1.23	1.05	1.01	**-3.8**	Local
178 ▼ **Aristocrat**	Heaven Hill	Vodka	–	–	1.00	1.01	1.01	**0.0**	Local
179 ▼ **Blue Riband**	United Spirits	Gin	0.96	0.99	1.09	1.13	1.00	**-11.5**	Local
180 ▲ **Zubr**	Stock Spirits Group	Vodka	0.40	0.50	0.80	0.90	1.00	**11.1**	Local
* **Ypioca**	Grupo Ypioca	Cachaça	7.13	7.05	6.83	6.89	n/a	**–**	Local
* **Rémy Martin**	Rémy Cointreau	Cognac	1.84	1.48	1.55	1.65	n/a	**–**	Global
* **Bols range**	Lucas Bols	Liqueurs	1.26	1.28	1.30	1.40	n/a	**–**	Global

CHART TOPPERS

Little change at the top for global brands but plenty of upheaval in the local/domestic category

As in 2010 there was very little movement in the rankings of the leading international brands, the only change being Bacardi overtaking Pirassununga as the second biggest.

This was primarily due to the poor performance of the Brazilian brand, mainly in its domestic market, rather than the dynamic growth of Bacardi, which at least continued to expand.

REGIONAL

In regional brands, Pernod Ricard's Seagram's gin still leads the list, despite continuing its steep declines, and US consumers continue to trade up or down from the product.

This leadership position has come under real threat from Campari's Aperol brand, whose 31% growth in 2011 – driven by sales in Germany – puts it within touching distance of Seagram's.

▶ page 14

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Local Brands 3m+ cases

VOLUME: MILLIONS OF 9-LITRE CASES

BRAND	OWNER	CATEGORY	2007	2008	2009	2010	2011	% +/-
Jinro	Jinro	Soju	69.84	75.99	63.98	64.28	61.38	**-4.5**
Lotte Liquor BG	Lotte Liquor	Soju	19.00	19.90	21.20	22.60	23.90	**5.5**
Emperador	Alliance Global Group	Brandy	7.30	7.20	6.30	9.60	20.10	**109.4**
Tanduay	Tanduay Distillers	Rum	14.43	16.29	16.92	18.36	18.71	**1.9**
Officer's Choice	Allied Blenders & Distillers	Whisky-Indian	6.60	9.50	12.00	16.00	16.53	**3.3**
McDowell's No.1	United Spirits	Whisky-Indian	11.46	13.39	13.52	14.32	16.08	**12.3**
Bagpiper	United Spirits	Whisky-Indian	13.95	15.41	16.26	16.39	15.98	**-2.5**
McDowell's No.1 Celebration	United Spirits	Rum	7.63	9.67	11.17	13.89	15.63	**12.5**
Red Star Er Guo Tou	Beijing Red Star Co	Baijiu	6.02	7.19	8.89	10.94	13.68	**25.0**
Royal Stag	Pernod Ricard	Whisky-Indian	5.63	6.76	8.40	10.39	12.49	**20.2**
McDowell's No.1	United Spirits	Brandy-Indian	7.64	7.53	9.22	11.54	11.72	**1.6**
Old Tavern	United Spirits	Whisky-Indian	2.84	4.77	6.84	9.08	11.07	**21.9**
Original Choice	John Distilleries	Whisky-Indian	6.41	8.84	10.21	10.32	10.77	**4.4**
Khlibniy Dar	Bayadera Group	Vodka	3.57	6.63	10.20	12.30	9.35	**-24.0**
Zelenaya Marka (Green Mark)	CEDC	Vodka	8.10	11.97	11.25	10.85	9.30	**-14.3**
Iichiko	Sanwa Shurui	Shochu	9.88	9.14	8.74	8.32	8.16	**-1.9**
Bohae	Bohae Brewery Co	Soju	8.50	8.20	8.20	7.60	7.40	**-2.6**
Imperial Blue	Pernod Ricard	Whisky-Indian	3.13	3.83	4.83	6.11	7.17	**17.3**
Belenkaya	SY Group	Vodka	2.04	2.25	2.81	4.92	7.07	**43.8**
Pyat Ozer	Alcohol Siberian Group	Vodka	6.04	6.50	6.10	6.30	6.60	**4.8**
Hayward's	United Spirits	Whisky-Indian	2.31	2.77	4.06	4.65	6.16	**32.5**
Mansion House Brandy	Tilaknagar Industries	Brandy-Indian	1.32	1.77	3.96	5.38	5.82	**8.2**
Honey Bee	United Spirits	Brandy-Indian	2.20	2.82	3.60	4.37	4.75	**8.7**
Czysta de Luxe (ZG)	Stock Spirits Group	Vodka	0.08	1.87	5.39	6.40	4.60	**-28.1**
Director's Special	United Spirits	Whisky-Indian	3.69	4.00	4.39	4.54	4.52	**-0.4**
Krupnik	Belvédère	Vodka	-	-	-	1.90	4.50	**136.8**
8PM	Radico Khaitan	Whisky-Indian	4.16	3.76	3.18	3.94	4.32	**9.6**
Mian Zhu Jiu	Sichuan Jian Nan Chun (Group)	Baijiu	-	-	3.45	3.87	4.15	**7.2**
Jingzhi Baigan	Shandong JingZhi Distillery	Baijiu	-	-	-	-	4.12	**0.0**
Yeni Raki	Diageo	Raki			3.40	3.90	4.10	**5.1**
Svedka	Constellation Brands	Vodka	1.53	2.10	2.90	3.41	3.69	**8.2**
Kanoka	Asahi Breweries	Shochu	3.44	3.56	3.66	3.84	3.59	**-6.5**
Dreher	Gruppo Campari	Brandy-Brazilian	3.75	3.60	3.45	3.50	3.57	**2.0**
Blenders Pride	Pernod Ricard	Whisky-Indian	1.51	1.92	2.31	2.82	3.46	**22.7**
Old Admiral	Radico Khaitan	Brandy-Indian	1.40	1.40	1.81	2.99	3.24	**8.4**
Gold Riband	United Spirits	Whisky-Indian	1.63	1.84	2.68	2.25	3.07	**36.4**

Local Brands 3m + cases

VOLUME: MILLIONS OF 9-LITRE CASE

BRAND	OWNER	CATEGORY	2007	2008	2009	2010	2011	% +/-
Jinro	Jinro	Soju	69.84	75.99	63.98	64.28	61.38	**-4.5**
Lotte Liquor BG	Lotte Liquor	Soju	19.0	19.9	21.2	22.6	23.9	**5.5**
Emperador	Alliance Global Group	Brandy	7.30	7.20	6.30	9.60	20.10	**109.4**
Tanduay	Tanduay Distillers	Rum	14.43	16.29	16.92	18.36	18.71	**1.9**
Officer's Choice	Allied Blenders & Distillers	Whisky-Indian	6.60	9.50	12.00	16.00	16.53	**3.3**
McDowell's No.1	United Spirits	Whisky-Indian	11.46	13.39	13.52	14.32	16.08	**12.3**
Bagpiper	United Spirits	Whisky-Indian	13.95	15.41	16.26	16.39	15.98	**-2.5**
McDowell's No.1 Celebration	United Spirits	Rum	7.63	9.67	11.17	13.89	15.63	**12.5**
Red Star Er Guo Tou	Beijing Red Star Co	Baijiu	6.02	7.19	8.89	10.94	13.68	**25.0**
Royal Stag	Pernod Ricard	Whisky-Indian	5.63	6.76	8.40	10.39	12.49	**20.2**
McDowell's No.1	United Spirits	Brandy-Indian	7.64	7.53	9.22	11.54	11.72	**1.6**
Old Tavern	United Spirits	Whisky-Indian	2.84	4.77	6.84	9.08	11.07	**21.9**
Original Choice	John Distilleries	Whisky-Indian	6.41	8.84	10.21	10.32	10.77	**4.4**
Klebnyi Dar	Bayadera Group	Vodka	3.57	6.63	10.20	12.30	9.35	**-24.0**
Zelenaya Marka (Green Mark)	CEDC	Vodka	8.10	11.97	11.25	10.85	9.30	**-14.3**
Iichiko	Sanwa Shurui	Shochu	9.88	9.14	8.74	8.32	8.16	**-1.9**
Bohae	Bohae Brewery Co	Soju	8.50	8.20	8.20	7.60	7.40	**-2.6**
Imperial Blue	Pernod Ricard	Whisky-Indian	3.13	3.83	4.83	6.11	7.17	**17.3**
Belenkaya	SY Group	Vodka	2.04	2.25	2.81	4.92	7.07	**43.8**
Pyat Ozer	Alcohol Siberian Group	Vodka	6.04	6.50	6.10	6.30	6.60	**4.8**
Hayward's	United Spirits	Whisky-Indian	2.31	2.77	4.06	4.65	6.16	**32.5**
Mansion House Brandy	Tilaknagar Industries	Brandy-Indian	1.32	1.77	3.96	5.38	5.82	**8.2**
Honey Bee	United Spirits	Brandy-Indian	2.20	2.82	3.60	4.37	4.75	**8.7**
Czysta de Lux (ZG)	Stock Spirits Group	Vodka	0.08	1.87	5.39	6.40	4.60	**-28.1**
Director's Special	United Spirits	Whisky-Indian	3.69	4.00	4.39	4.54	4.52	**-0.4**
Krupnik	Belvédère	Vodka	-	-	-	1.90	4.50	**136.8**
8PM	Radico Khaitan	Whisky-Indian	4.16	3.76	3.18	3.94	4.32	**9.6**
Mian Zhu Jiu	Sichuan Jian Nan Chun (Group)	Baijiu	-	-	3.45	3.87	4.15	**7.2**
Jingzhi Baigan	Shandong JingZhi Distillery	Baijiu	-	-	-	-	4.12	**0.0**
Yeni Raki	Diageo	Raki	-	-	3.40	3.90	4.10	**5.1**
Svedka	Constellation Brands	Vodka	1.53	2.10	2.90	3.41	3.69	**8.2**
Kanoka	Asahi Breweries	Shochu	3.44	3.56	3.66	3.84	3.59	**-6.5**
Dreher	Gruppo Campari	Brandy-Brazilian	3.75	3.60	3.45	3.50	3.57	**2.0**
Blenders Pride	Pernod Ricard	Whisky-Indian	1.51	1.92	2.31	2.82	3.46	**22.7**
Old Admiral	Radico Khaitan	Brandy-Indian	1.40	1.40	1.81	2.99	3.24	**8.4**
Gold Riband	United Spirits	Whisky-Indian	1.63	1.84	2.68	2.25	3.07	**36.4**

► If trends continue in this vein Aperol will become the number one in 2012.

Japanese whisky brands, which have experienced fast growth over the past two or three years, have seen volumes fall or the growth rate decline substantially.

This has been mainly due to Japanese consumers switching to other types of whisky for Highball cocktails, rather than just sticking with domestic whisky brands.

DOMESTIC/LOCAL

This group saw more upheavals than the other two categories combined. The most notable one is the entry at number three of Philippine brand Emperador brandy, which saw volumes more than double due to product development.

As mentioned in last year's supplement, United Spirits' Bagpiper was coming under pressure as the largest Indian brand from Officer's Choice. That pressure told with the Allied Blenders & Distillers' brand overtaking Bagpiper.

"The domestic sector saw more upheaval than the other two combined"

The continued growth of Indian whiskies, the entry of Chinese baijiu Red Star and falling sales of eastern European vodkas means all top 10 local brands are consumed in Asia. Indeed, one has to go to the 14th ranked Klebnyi Dar to find one not consumed in Asia. ■

Top 10 Regional Brands

VOLUME: MILLIONS OF 9-LITRE CASES

BRAND	OWNER	CATEGORY	2007	2008	2009	2010	2011	% +/-
Seagram's	Pernod Ricard	Gin	3.44	3.38	3.03	2.93	2.77	**-5.5**
Aperol	Gruppo Campari	Bitters	1.15	1.30	1.65	1.95	2.55	**30.8**
Kakubin	Suntory	Whisky-Japanese	1.59	1.91	2.18	2.79	2.50	**-10.4**
Seagram's 7 Crown	Diageo	Whiskey-US	2.50	2.50	2.50	2.50	2.40	**-4.0**
Black Velvet	Constellation Brands	Whisky-Canadian	1.91	1.96	2.04	2.07	2.08	**0.5**
Parliament	CEDC	Vodka	2.70	3.08	2.50	2.40	2.00	**-16.7**
Clan Campbell	Pernod Ricard	Whisky-scotch	1.64	1.72	1.76	1.76	1.96	**11.4**
Black Nikka	Asahi Breweries	Whisky-Japanese	1.11	1.23	1.36	1.75	1.84	**5.1**
Cacique	Diageo	Rum	1.70	1.70	1.80	1.70	1.70	**0.0**
Buchanan's	Diageo	Whisky-scotch	1.60	1.50	1.30	1.40	1.60	**14.3**

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FASTEST GROWING

Domestic brands lead the charge as they identify opportunities for trading up

Domestic/local brands dominate the fastest growing category, with 35 of them in double-digit growth or more.

Three domestic/local brands saw triple-digit growth, led by Belvédère's Polish vodka brand Krupnik.

With this brand the company has successfully tapped into Polish consumer demand for high quality, low-priced vodka, something Stock Spirit's Cysta De Luxe did so successfully up until 2010.

Growth was driven by heavy promotional support, which also included the introduction of a lemon-flavoured variant.

The second fastest growing brand, McDowell's VSOP brandy, has benefitted from Indian consumers wanting to trade up to more premium products.

Taking third place, and the brand to see the largest actual volume growth, Emperador brandy benefitted from a lot of new product development, notably its Light variant, which was launched at the end of 2010.

Beneath the three fastest growing domestic/local brands, perhaps the most interesting brand is Diageo's Cîroc super-premium vodka.

This brand, which grew by 66% in 2011, benefitted from flavour extensions and its close association with hip-hop star Sean Combs, who is Ciroc's brand ambassador.

INTERNATIONAL

Topping the international brand table in 2011 was Bacardi's William Lawson's scotch whisky, which managed to grow by 35%.

This was driven by a strong performance in the fast growing scotch markets of Mexico and Russia, where the brand's economy price point is appealing to many consumers.

The brand may also have benefitted from retailers in France, its major market, stocking up on volumes prior to the duty rise.

Beneath that, new entry Poliakov benefitted from strong international expansion from a low base, while Fernet Branca and Jameson benfitted from strong growth in their core markets, Argentina and the US respectively

The surprise in this list is Pernod Ricard's Ricard brand, which saw growth of 13% in 2011.

However, this is no great resurgence of anis, but retailers in France stocking up with the product before the rise in excise duty at the start of 2011.

> *"The company has tapped into demand for high quality, low priced vodka"*

REGIONAL

For regional brands, the stand-out performer is Campari's Aperol bitters brand, growth of which came from Italy but, increasingly importantly, Germany. ■

Fastest Growing *Global Brands*

VOLUME: MILLIONS OF 9-LITRE CASES

BRAND	OWNER	CATEGORY	2007	2008	2009	2010	2011	% +/-
William Lawson's	Bacardi	Whisky-scotch	1.30	1.50	1.59	1.69	2.29	**35.5**
Poliakov	La Martiniquaise	Vodka	0.4	0.55	0.735	0.85	1.04	**22.4**
Fernet Branca	Fratelli Branca Distillerie	Bitters	3.12	3.28	3.31	3.85	4.63	**20.3**
Jameson	Pernod Ricard	Whiskey-Irish	2.48	2.73	2.74	3.17	3.78	**19.2**
Ricard	Pernod Ricard	Anis	5.78	5.52	5.37	5.38	6.20	**15.2**
Sir Edward's	Bardinet	Whisky-scotch	1.27	1.05	1.09	1.19	1.35	**13.4**
Courvoisier	Beam	Cognac	1.17	1.19	1.02	1.20	1.34	**11.7**
Wild Turkey	Gruppo Campari	Whiskey-US-bourbon	-	-	-	0.99	1.10	**11.1**
Jim Beam	Beam	Whiskey-US-bourbon	5.24	5.16	5.08	5.30	5.86	**10.6**
Label 5	La Martiniquaise	Whisky-scotch	1.91	1.98	2.16	2.27	2.50	**10.1**
Chivas Regal	Pernod Ricard	Whisky-scotch	4.37	4.57	3.87	4.50	4.89	**8.7**
Teacher's	Beam	Whisky-scotch	1.98	1.96	1.73	1.89	2.05	**8.5**
Amarula	Distell Group	Liqueurs	1.08	1.08	1.10	1.20	1.30	**8.3**
Malibu	Pernod Ricard	Liqueurs	3.63	3.70	3.23	3.40	3.68	**8.2**
Bombay	Bacardi	Gin	2.00	2.00	1.97	2.15	2.32	**7.9**
Glenfiddich	William Grant & Sons	Whisky-single malt scotch	0.88	0.85	0.80	0.95	1.03	**7.8**
Johnnie Walker	Diageo	Whisky-scotch	15.80	16.30	15.30	16.90	18.00	**6.5**
Patrón Tequila	Patrón Spirits	Tequila	1.60	1.73	1.74	1.76	1.88	**6.5**
Jack Daniel's	Brown-Forman	Whiskey-US-Tennessee	9.33	9.51	9.57	9.95	10.58	**6.3**

Fastest Growing *Local Brands*

VOLUME: MILLIONS OF 9-LITRE CASES

BRAND	OWNER	CATEGORY	2007	2008	2009	2010	2011	% +/-
Krupnik	Belvédère	Vodka	-	-	-	1.90	4.50	**136.8**
McDowell's VSOP	United Spirits	Brandy	-	-	0.03	0.64	1.40	**118.8**
Emperador	Alliance Global Group	Brandy	7.30	7.20	6.30	9.60	20.10	**109.4**
Hakata No Hana	Oenon Holdings	Shochu	1.70	1.60	1.52	0.89	1.70	**91.0**
Cîroc	Diageo	Vodka	-	-	0.40	0.90	1.50	**66.7**
Silver Cup Brandy	Amrut Distilleries	Brandy-Indian	0.79	1.42	0.86	0.66	1.06	**60.6**
Belenkaya	SY Group	Vodka	2.04	2.25	2.81	4.92	7.07	**43.7**
Carew's Dry	United Spirits	Gin	0.45	0.54	0.66	0.79	1.08	**36.7**
Gold Riband	United Spirits	Whisky-Indian	1.63	1.84	2.68	2.25	3.07	**36.4**
Istynna	Olimp Corp	Vodka	-	-	0.50	1.63	2.18	**33.7**
Lubelska	Stock Spirits Group	Liqueurs	0.29	0.50	0.60	1.50	2.00	**33.3**
UV Vodka	Phillips Distilling	Vodka	0.51	0.66	0.85	1.06	1.40	**32.1**
Hayward's	United Spirits	Whisky-Indian	2.31	2.77	4.06	4.65	6.16	**32.5**
Madira XXX	Tilaknagar Industries	Rum	0.02	0.18	0.82	1.28	1.62	**26.6**
Red Star Er Guo Tou	Beijing Red Star Co	Baijiu	6.02	7.19	8.89	10.94	13.68	**25.0**
Blenders Pride	Pernod Ricard	Whisky-Indian	1.51	1.92	2.31	2.82	3.46	**22.7**
Haoma	Kokshetauminvody AO	Vodka	1.04	1.25	1.27	1.37	1.67	**21.9**
Old Tavern	United Spirits	Whisky-Indian	2.84	4.77	6.84	9.08	11.07	**21.9**
Royal Stag	Pernod Ricard	Whisky-Indian	5.63	6.76	8.40	10.39	12.49	**20.2**
Signature	United Spirits	Whisky-Indian	0.76	0.99	1.14	1.32	1.56	**18.2**

Fastest Growing *Regional Brands*

VOLUME: MILLIONS OF 9-LITRE CASES

BRAND	OWNER	CATEGORY	2007	2008	2009	2010	2011	% +/
Aperol	Gruppo Campari	Bitters	1.15	1.30	1.65	1.95	2.55	**30.8**
Buchanan's	Diageo	Whisky-scotch	1.60	1.50	1.30	1.40	1.60	**14.3**
Pastis 51	Pernod Ricard	Anis	1.49	1.41	1.34	1.27	1.44	**13.4**
Clan Campbell	Pernod Ricard	Whisky-scotch	1.64	1.72	1.76	1.76	1.96	**11.4**
Black Nikka	Asahi Breweries	Whisky-Japanese	1.11	1.23	1.36	1.75	1.84	**5.1**

Fastest Declining *Overall*

VOLUME: MILLIONS OF 9-LITRE CASES

BRAND	OWNER	CATEGORY	2007	2008	2009	2010	2011	% +/
Starogardzka	Belvédère	Vodka	2.85	3.01	2.00	1.50	1.02	**-32.0**
Bols	CEDC	Vodka	1.67	1.85	1.85	1.60	1.10	**-31.3**
Czysta de Luxe (ZG)	Stock Spirits Group	Vodka	0.08	1.87	5.39	6.40	4.60	**-28.1**
Khlibniy Dar	Bayadera Group	Vodka	3.57	6.63	10.20	12.30	9.35	**-24.0**
Yamskaya	CEDC	Vodka	-	2.16	2.40	2.61	2.00	**-23.4**
Zolodkowa Gorzka	Stock Spirits Group	Vodka	1.36	1.71	1.80	1.80	1.40	**-22.2**
Daigoro	Asahi Breweries	Shochu	4.66	4.44	4.17	3.74	2.93	**-21.7**
Absolwent	CEDC	Vodka	4.12	4.18	3.70	2.80	2.20	**-21.4**

WHISKIES

Emerging markets prove productive for global whisky brands

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Diageo's Johnnie Walker remained the biggest whisky brand in the world, strengthening its position thanks to very strong growth in emerging markets such as Brazil, South Africa and Russia.

Beneath Johnnie Walker there was a reordering of Indian whisky brands.

The leader in 2010, United Spirits' Bagpiper, was the third biggest in 2011, having been overtaken by stablemate McDowell's No.1, which saw strong double-digit growth, and by Allied Blenders & Distillers' Officer's Choice brand.

The latter saw only moderate growth, but that – combined with Bagpiper's decline – allowed the change to happen.

Of the other major international whisk(e)y brands, Jack Daniel's continued to grow thanks to a strong showing in France and reasonable growth in other large markets such as the UK and Germany.

Among the major scotch brands Pernod Ricard's big two, Ballantine's and Chivas Regal, performed well. Ballantine's growth of 5% was held back by a steep decline in Spain, but it saw strong growth in Poland and Latin America.

Figures were, however, boosted by pre-buying in France before the duty rise. Chivas Regal's growth was far stronger thanks to rapid growth in duty free/travel retail as well as in Asia and eastern Europe.

Chivas Regal's strong growth meant that it overtook Diageo's J&B – which continued to suffer due to its over-exposure to the declining Spanish market – and closed up on William Grant's eponymous brand. Grant's saw volumes decline, primarily due to flat and declining volumes in its two biggest markets, France and the UK. The company's focus has been on maintaining value and consequently it has not discounted as heavily in these markets, losing volumes to those that have.

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Top 30 *Whiskies*

VOLUME: MILLIONS OF 9-LITRE CASES

BRAND	OWNER	CATEGORY	2007	2008	2009	2010	2011	% +/-	STATUS
Johnnie Walker	Diageo	Scotch	15.80	16.30	15.30	16.90	18.00	**6.5**	Global
Officer's Choice	Allied Blenders & Distillers	Indian	6.60	9.50	12.00	16.00	16.53	**3.3**	Local
McDowell's No.1	United Spirits	Indian	11.46	13.39	13.52	14.32	16.08	**12.3**	Local
Bagpiper	United Spirits	Indian	13.95	15.41	16.26	16.39	15.98	**-2.5**	Local
Royal Stag	Pernod Ricard	Indian	5.63	6.76	8.40	10.39	12.49	**20.2**	Local
Old Tavern	United Spirits	Indian	2.84	4.77	6.84	9.08	11.07	**21.9**	Local
Original Choice	John Distilleries	Indian	6.41	8.84	10.21	10.32	10.77	**4.4**	Local
Jack Daniel's	Brown-Forman	US-Tennessee	9.33	9.51	9.57	9.95	10.58	**6.4**	Global
Imperial Blue	Pernod Ricard	Indian	3.13	3.83	4.83	6.11	7.17	**17.3**	Local
Ballantine's	Pernod Ricard	Scotch	6.17	6.50	5.76	6.18	6.47	**4.7**	Global
Hayward's	United Spirits	Indian	2.31	2.77	4.06	4.65	6.16	**32.5**	Local
Jim Beam	Beam	US-bourbon	5.24	5.16	5.08	5.30	5.86	**10.6**	Global
Crown Royal	Diageo	Canadian	5.00	5.10	4.90	5.00	5.00	**0.0**	Global
Grant's	William Grant & Sons	Scotch	4.79	4.97	4.78	4.99	4.97	**-0.4**	Global
Chivas Regal	Pernod Ricard	Scotch	4.37	4.57	3.87	4.50	4.89	**8.7**	Global
J&B Rare	Diageo	Scotch	5.90	5.90	5.10	4.80	4.80	**0.0**	Global
Director's Special	United Spirits	Indian	3.69	4.00	4.39	4.54	4.52	**-0.4**	Local
8PM	Radico Khaitan	Indian	4.16	3.76	3.18	3.94	4.32	**9.6**	Local
Jameson	Pernod Ricard	Irish	2.48	2.73	2.74	3.17	3.78	**19.2**	Global
Blenders Pride	Pernod Ricard	Indian	1.51	1.92	2.31	2.82	3.46	**22.7**	Local
Dewar's	Bacardi	Scotch	3.50	3.41	3.24	3.27	3.19	**-2.4**	Global
Gold Riband	United Spirits	Indian	1.63	1.84	2.68	2.25	3.07	**36.4**	Local
Director's Special Black	United Spirits	Indian	1.34	1.77	2.03	2.88	2.92	**1.4**	Local
McDowell's Green Label	United Spirits	Indian	1.83	1.70	1.99	2.53	2.92	**15.4**	Local
William Peel	Belvédère	Scotch	1.78	2.12	2.35	2.50	2.90	**16.0**	Local
Kakubin	Suntory	Japanese	1.59	1.91	2.18	2.79	2.50	**-10.4**	Regional
Bell's	Diageo	Scotch	2.30	2.20	2.30	2.40	2.50	**4.2**	Global
Label 5	La Martiniquaise	Scotch	1.91	1.98	2.16	2.27	2.50	**10.1**	Global
Seagram's 7 Crown	Diageo	US	2.50	2.50	2.50	2.50	2.40	**-4.0**	Regional
William Lawson's	Bacardi	Scotch	1.30	1.50	1.59	1.69	2.29	**35.5**	Global

Fastest Growing *Whiskies*

VOLUME: MILLIONS OF 9-LITRE CASES

BRAND	OWNER	CATEGORY	2007	2008	2009	2010	2011	% +/-	STATUS
Gold Riband	United Spirits	Indian	1.63	1.84	2.68	2.25	3.07	36.4	Local
William Lawson's	Bacardi	Scotch	1.30	1.50	1.59	1.69	2.29	35.5	Global
Hayward's	United Spirits	Indian	2.31	2.77	4.06	4.65	6.16	32.5	Local
Blenders Pride	Pernod Ricard	Indian	1.51	1.92	2.31	2.82	3.46	22.7	Local
Old Tavern	United Spirits	Indian	2.84	4.77	6.84	9.08	11.07	21.9	Local
Royal Stag	Pernod Ricard	Indian	5.63	6.76	8.40	10.39	12.49	20.2	Local
Jameson	Pernod Ricard	Irish	2.48	2.73	2.74	3.17	3.78	19.2	Global
Signature	United Spirits	Indian	0.76	0.99	1.14	1.32	1.56	18.2	Local
Imperial Blue	Pernod Ricard	Indian	3.13	3.83	4.83	6.11	7.17	17.3	Local
Royal Challenge	United Spirits	Indian	1.17	1.29	1.27	1.16	1.35	16.4	Local
William Peel	Belvédère	Scotch	1.78	2.12	2.35	2.50	2.90	16.0	Local
McDowell's Green Label	United Spirits	Indian	1.83	1.70	1.99	2.53	2.92	15.4	Local
Maker's Mark	Beam	US-bourbon	0.79	0.85	0.89	1.03	1.18	14.6	Local
Buchanan's	Diageo	Scotch	1.60	1.50	1.30	1.40	1.60	14.3	Regional
Sir Edward's	Bardinet	Scotch	1.27	1.05	1.09	1.19	1.35	13.4	Global
McDowell's No.1	United Spirits	Indian	11.46	13.39	13.52	14.32	16.08	12.3	Local
Clan Campbell	Pernod Ricard	Scotch	1.64	1.72	1.76	1.76	1.96	11.4	Regional
Wild Turkey	Gruppo Campari	US-bourbon	-	-	-	0.99	1.10	11.1	Global
Jim Beam	Beam	US-bourbon	5.24	5.16	5.08	5.30	5.86	10.6	Global
Label 5	La Martiniquaise	Scotch	1.91	1.98	2.16	2.27	2.50	10.1	Global
8PM	Radico Khaitan	Indian	4.16	3.76	3.18	3.94	4.32	9.6	Local
Chivas Regal	Pernod Ricard	Scotch	4.37	4.57	3.87	4.50	4.89	8.7	Global
Teacher's	Beam	Scotch	1.98	1.96	1.73	1.89	2.05	8.5	Global
Glenfiddich	William Grant & Sons	Scotch-single malt	0.88	0.85	0.80	0.95	1.03	7.8	Global
Johnnie Walker	Diageo	Scotch	15.80	16.30	15.30	16.90	18.00	6.5	Global
Jack Daniel's	Brown-Forman	US-Tennessee	9.33	9.51	9.57	9.95	10.58	6.4	Global
Black Nikka	Asahi Breweries	Japanese	1.11	1.23	1.36	1.75	1.84	5.1	Regional
Ballantine's	Pernod Ricard	Scotch	6.17	6.50	5.76	6.18	6.47	4.7	Global
Original Choice	John Distilleries	Indian	6.41	8.84	10.21	10.32	10.77	4.4	Local
Bell's	Diageo	Scotch	2.30	2.20	2.30	2.40	2.50	4.2	Global

Scotch *Whiskies*

VOLUME: MILLIONS OF 9-LITRE CASES

BRAND	OWNER	2007	2008	2009	2010	2011	% +/-	STATUS
Johnnie Walker	Diageo	15.80	16.30	15.30	16.90	18.00	**6.5**	Global
Ballantine's	Pernod Ricard	6.17	6.50	5.76	6.18	6.47	**4.7**	Global
Grant's	William Grant & Sons	4.79	4.97	4.78	4.99	4.97	**-0.4**	Global
Chivas Regal	Pernod Ricard	4.37	4.57	3.87	4.50	4.89	**8.7**	Global
J&B Rare	Diageo	5.90	5.90	5.10	4.80	4.80	**0.0**	Global
Dewar's	Bacardi	3.50	3.41	3.24	3.27	3.19	**-2.4**	Global
William Peel	Belvédère	1.78	2.12	2.35	2.50	2.90	**16.0**	Local
Bell's	Diageo	2.30	2.20	2.30	2.40	2.50	**4.2**	Global
Label 5	La Martiniquaise	1.91	1.98	2.16	2.27	2.50	**10.1**	Global
William Lawson's	Bacardi	1.30	1.50	1.59	1.69	2.29	**35.5**	Global
Teacher's	Beam	1.98	1.96	1.73	1.89	2.05	**8.5**	Global
Clan Campbell	Pernod Ricard	1.64	1.72	1.76	1.76	1.96	**11.4**	Regional
100 Pipers	Pernod Ricard	2.50	2.25	2.03	1.73	1.71	**-1.2**	Global
Buchanan's	Diageo	1.60	1.50	1.30	1.40	1.60	**14.3**	Regional
Sir Edward's	Bardinet	1.27	1.05	1.09	1.19	1.35	**13.4**	Global
Clan MacGregor	William Grant & Sons	1.26	1.32	1.32	1.15	1.14	**-0.7**	Regional
Glenfiddich	William Grant & Sons	0.88	0.85	0.80	0.95	1.03	**7.8**	Global

Indian *Whiskies*

VOLUME: MILLIONS OF 9-LITRE CASES

BRAND	OWNER	2007	2008	2009	2010	2011	+/-	STATUS
Officer's Choice	Allied Blenders & Distillers	6.60	9.50	12.00	16.00	16.53	**3.3**	Local
McDowell's No.1	United Spirits	11.46	13.39	13.52	14.32	16.08	**12.3**	Local
Bagpiper	United Spirits	13.95	15.41	16.26	16.39	15.98	**-2.5**	Local
Royal Stag	Pernod Ricard	5.63	6.76	8.40	10.39	12.49	**20.2**	Local
Old Tavern	United Spirits	2.84	4.77	6.84	9.08	11.07	**21.9**	Local
Original Choice	John Distilleries	6.41	8.84	10.21	10.32	10.77	**4.4**	Local
Imperial Blue	Pernod Ricard	3.13	3.83	4.83	6.11	7.17	**17.3**	Local
Hayward's	United Spirits	2.31	2.77	4.06	4.65	6.16	**32.5**	Local
Director's Special	United Spirits	3.69	4.00	4.39	4.54	4.52	**-0.4**	Local
8PM	Radico Khaitan	4.16	3.76	3.18	3.94	4.32	**9.6**	Local
Blenders Pride	Pernod Ricard	1.51	1.92	2.31	2.82	3.46	**22.7**	Local
Gold Riband	United Spirits	1.63	1.84	2.68	2.25	3.07	**36.4**	Local
Director's Special Black	United Spirits	1.34	1.77	2.03	2.88	2.92	**1.4**	Local
McDowell's Green Label	United Spirits	1.83	1.70	1.99	2.53	2.92	**15.4**	Local
Signature	United Spirits	0.76	0.99	1.14	1.32	1.56	**18.2**	Local
Royal Challenge	United Spirits	1.17	1.29	1.27	1.16	1.35	**16.4**	Local

North American *Whiskies*

VOLUME: MILLIONS OF 9-LITRE CASES

BRAND	OWNER	2007	2008	2009	2010	2011	% +/-	STATUS
Jack Daniel's	Brown-Forman	9.33	9.51	9.57	9.95	10.58	**6.4**	Global
Jim Beam	Beam	5.24	5.16	5.08	5.30	5.86	**10.6**	Local
Crown Royal	Diageo	5.00	5.10	4.90	5.00	5.00	**0.0**	Global
Seagram's 7 Crown	Diageo	2.50	2.50	2.50	2.50	2.40	**-4.0**	Regional
Black Velvet	Constellation Brands	1.91	1.96	2.04	2.07	2.08	**0.5**	Regional
Canadian Club	Beam	2.04	1.96	1.89	1.92	1.93	**0.5**	Global
Canadian Mist	Brown-Forman	1.91	1.87	1.84	1.75	1.66	**-5.5**	Local
Evan Williams	Heaven Hill	1.03	1.05	1.24	1.29	1.30	**0.8**	Local
Maker's Mark	Beam	0.79	0.85	0.89	1.03	1.18	**14.6**	Local
Seagram's VO	Diageo	1.30	1.30	1.20	1.10	1.10	**0.0**	Regional
Wild Turkey	Gruppo Campari	-	-	-	0.99	1.10	**11.1**	Global

Other countries *Whiskies*

VOLUME: MILLIONS OF 9-LITRE CASES

BRAND	OWNER	2007	2008	2009	2010	2011	% +/-	STATUS
Jameson	Pernod Ricard	2.48	2.73	2.74	3.17	3.78	**19.2**	Global
Kakubin	Suntory	1.59	1.91	2.18	2.79	2.50	**-10.4**	Regional
Black Nikka	Asahi Breweries	1.11	1.23	1.36	1.75	1.84	**5.1**	Regional
DYC	Beam	1.43	1.22	1.19	1.17	1.04	**-11.1**	Local

FASTEST GROWERS

Indian whisky brands dominate the fastest growing category, which is hardly surprising considering the popularity (1.3 billion litres sold last year) and double-digit growth rate in 2011.

It is, however, interesting to see a more premium Indian whisky brand such as Blender's Pride being one of the fastest growing off a relatively large base.

Of the non-Indian whisky brands in the list, a number of scotches which saw double-digit growth – including William Lawson's, William Peel, Label 5 and Sir Edwards – could well have benefitted from pre-buying by French stockists prior to the duty rise, as well as good growth in emerging markets.

Another scotch brand of interest is Buchanan's, the strong growth of which was not due to emerging market exposure (where volumes suffered thanks to price rises) but the US, where the brand's strong Latin roots and its consequent appeal to the Hispanics living there, drove volume growth in a declining market.

Bourbon/US whiskey is also well represented in the list of fastest growing brands.

The most dynamic of all was Beam's Maker's Mark, which continues to benefit from consumers primarily in the US but also internationally trading up to super-premium small batch bourbons.

Wild Turkey and Jim Beam both continued to benefit from the growing popularity of flavoured bourbons.

Jameson also continues to grow strongly, primarily due to ongoing rapid growth in the US. It is also starting to see strong growth in a number of other markets such as Canada and Russia.

VODKA

Shutterstock/Alex Uralsky

The western world's favourite spirit continues to make inroads into emerging markets

The number (52) and the geographic spread of vodka brands shows the universal popularity of the category. In addition to a plethora of brands from traditional eastern European countries and North American and western European markets, it also includes brands primarily sold in India (Magic Moments), Brazil (Orloff) and Kazakhstan (Haoma).

Diageo's Smirnoff further strengthened its position as the category's biggest brand, now boasting sales of more than twice that of its nearest rival, which in 2011 was Pernod's Absolut. However, this was more to do with the falling away of a number of its big-volume rivals from eastern Europe than strong growth itself.

Smirnoff's actual growth was a disappointing 1% due to the brand's maturity in many of its key markets, such as the US and UK, which has not been adequately compensated for by strong growth in markets such as Brazil.

Many of the big Russian and Ukrainian vodka producers have suffered from such maturity of their brands in their key markets. Alongside that there has been an inability, due to lack of resources and possibly time, to develop the brands outside those markets. The one ▶ *page 24*

Top 30 *Vodkas*

VOLUME: MILLIONS OF 9-LITRE CASES

BRAND	OWNER	2007	2008	2009	2010	2011	+/-	STATUS
Smirnoff	Diageo	24.30	25.70	24.40	24.40	24.70	**1.2**	Global
Absolut	Pernod Ricard	10.73	10.73	10.03	10.90	11.21	**2.8**	Global
Khlebny Dar	Bayadera Group	3.57	6.63	10.20	12.30	9.35	**-24.0**	Local
Zelenaya Marka (Green Mark)	CEDC	8.10	11.97	11.25	10.85	9.30	**-14.3**	Global
Nemiroff	Nemiroff Ukrainian Vodka Co	8.89	8.55	9.10	9.21	8.03	**-12.8**	Global
Khortytsa	Khortytsa Distillery	9.40	9.06	9.25	9.00	7.50	**-16.7**	Global
Belenkaya	SY Group	2.04	2.25	2.81	4.92	7.07	**43.8**	Local
Pyat Ozer	Alcohol Siberian Group	6.04	6.50	6.10	6.30	6.60	**4.8**	Local
Czysta de Luxe (ZG)	Stock Spirits Group	0.08	1.87	5.39	6.40	4.60	**-28.1**	Local
Krupnik	Belvédère	-	-	-	1.90	4.50	**136.8**	Local
Grey Goose	Bacardi	3.60	3.60	3.46	3.65	3.79	**3.8**	Global
Svedka	Constellation Brands	1.53	2.10	2.90	3.41	3.69	**8.2**	Local
Skyy	Gruppo Campari	2.90	3.15	3.25	3.35	3.45	**3.0**	Global
Stolichnaya	SPI Group	3.33	3.20	3.00	3.12	3.32	**6.4**	Global
Finlandia	Brown-Forman	2.75	3.05	3.01	2.96	3.10	**4.7**	Global
Sobieski	Belvédère	2.50	2.75	3.00	3.05	2.80	**-8.2**	Global
Russian Standard	Roust	1.90	2.10	2.20	2.50	2.60	**4.0**	Global
Eristoff	Bacardi	1.70	1.80	1.90	2.27	2.41	**6.2**	Global
Absolwent	CEDC	4.12	4.18	3.70	2.80	2.20	**-21.4**	Local
Ketel One	Nolet Spirits	1.88	1.90	1.90	2.00	2.20	**10.0**	Global
Istynna	Olimp Corp	-	-	0.50	1.63	2.18	**33.7**	Local
Magic Moments	Radico Khaitan	0.25	0.58	0.86	1.82	2.15	**18.1**	Local
Glen's	Glen Catrine	1.70	1.80	1.90	2.10	2.10	**0.0**	Local
Yamskaya	CEDC	-	2.16	2.40	2.61	2.00	**-23.4**	Local
Parliament	CEDC	2.70	3.08	2.50	2.40	2.00	**-16.7**	Regional
Zhuravli	CEDC	-	2.55	2.36	2.15	1.95	**-9.3**	Local
Prime	Olimp Corp	0.94	1.51	1.51	1.60	1.85	**15.6**	Local
White Mischief	United Spirits	1.26	1.57	1.90	1.87	1.70	**-9.1**	Local
1906	Stock Spirits Group	0.74	0.83	1.39	1.70	1.70	**0.0**	Local
Burnett's	Heaven Hill	1.00	1.20	1.52	1.52	1.68	**10.5**	Local

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exception to this could be Nemiroff, the 13% decline of which was, according to the company, due to a board room dispute.

Ukrainian and Russian vodka producers' loss is Pernod Ricard's gain, with its Absolut brand now the world's second biggest. Absolut's growth of 3% was primarily in emerging markets such as Brazil, India and Russia, as well as France, while, for the first time in a number of years, sales in its main US market stabilised its volumes.

FASTEST GROWING

In terms of the fastest growing brands, beneath the top two – which were discussed in the fastest growing section (page 16) – there are the usual high performers from Russia and Ukraine.

SY Group's Belenkaya and Olimp Corp's Istynna seem to be on the upward curve of the vodka brand lifecycle of the region, where brands see rapid growth before peaking (possibly

▶ *page 26*

Fastest Growing *Vodkas*

VOLUME: MILLIONS OF 9-LITRE CASES

BRAND	OWNER	2007	2008	2009	2010	2011	% +/-	STATUS
Krupnik	Belvédère	-	-	-	1.90	4.50	**136.8**	Local
Cîroc	Diageo	-	-	0.40	0.90	1.50	**66.7**	Local
Belenkaya	SY Group	2.04	2.25	2.81	4.92	7.07	**43.8**	Local
Istynna	Olimp Corp	-	-	0.50	1.63	2.18	**33.7**	Local
UV Vodka	Phillips Distilling	0.51	0.66	0.85	1.06	1.40	**32.7**	Local
Poliakov	La Martiniquaise	0.40	0.55	0.74	0.85	1.04	**22.4**	Global
Haoma	Kokshetauminvody AO	1.04	1.25	1.27	1.37	1.67	**22.1**	Local
Magic Moments	Radico Khaitan	0.25	0.58	0.86	1.82	2.15	**18.1**	Local
Prime	Olimp Corp	0.94	1.51	1.51	1.60	1.85	**15.6**	Local
Zubr	Stock Spirits Group	0.40	0.50	0.80	0.90	1.00	**11.1**	Local
Burnett's	Heaven Hill	1.00	1.20	1.52	1.52	1.68	**10.5**	Local
Ketel One	Nolet Spirits	1.88	1.90	1.90	2.00	2.20	**10.0**	Global
Svedka	Constellation Brands	1.53	2.10	2.90	3.41	3.69	**8.2**	Local
Stolichnaya	SPI Group	3.33	3.20	3.00	3.12	3.32	**6.4**	Global
Eristoff	Bacardi	1.70	1.80	1.90	2.27	2.41	**6.2**	Global
Orloff	Pernod Ricard	-	-	-	1.02	1.08	**5.9**	Local
Three Olives	Proximo Spirits	1.10	1.25	1.32	1.40	1.48	**5.4**	Local
Pyat Ozer	Alcohol Siberian Group	6.04	6.50	6.10	6.30	6.60	**4.8**	Local
Finlandia	Brown-Forman	2.75	3.05	3.01	2.96	3.10	**4.7**	Global
Russian Standard	Roust	1.90	2.10	2.20	2.50	2.60	**4.0**	Global
Grey Goose	Bacardi	3.60	3.60	3.46	3.65	3.79	**3.8**	Global
Skyy	Gruppo Campari	2.90	3.15	3.25	3.35	3.45	**3.0**	Global
Absolut	Pernod Ricard	10.73	10.73	10.03	10.90	11.21	**2.8**	Global
Romanov	United Spirits	0.98	1.17	1.25	1.59	1.63	**2.5**	Local
Smirnoff	Diageo	24.30	25.70	24.40	24.40	24.70	**1.2**	Global
Myagkov	SY Group	2.41	1.23	1.37	1.58	1.59	**0.9**	Regional

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Global *Vodkas*

VOLUME: MILLIONS OF 9-LITRE CASES

BRAND	OWNER	2007	2008	2009	2010	2011	% +/-
Smirnoff	Diageo	24.30	25.70	24.40	24.40	24.70	**1.2**
Absolut	Pernod Ricard	10.73	10.73	10.03	10.90	11.21	**2.8**
Zelenaya Marka (Green Mark)	CEDC	8.10	11.97	11.25	10.85	9.30	**-14.3**
Nemiroff	Nemiroff Ukrainian Vodka Co	8.89	8.55	9.10	9.21	8.03	**-12.8**
Khortytsa	Khortytsa Distillery	9.40	9.60	9.25	9.00	7.50	**-16.7**
Grey Goose	Bacardi	3.60	3.60	3.46	3.65	3.79	**3.8**
Skyy	Gruppo Campari	2.90	3.15	3.25	3.35	3.45	**3.0**
Stolichnaya	SPI Group	3.33	3.20	3.00	3.12	3.32	**6.4**
Finlandia	Brown-Forman	2.75	3.05	3.01	2.96	3.10	**4.7**
Sobieski	Belvédère	2.50	2.75	3.00	3.05	2.80	**-8.2**
Russian Standard	Roust	1.90	2.10	2.20	2.50	2.60	**4.0**
Eristoff	Bacardi	1.70	1.80	1.90	2.27	2.41	**6.2**
Ketel One	Nolet Spirits	1.88	1.90	1.90	2.00	2.20	**10.0**
Wyborowa	Pernod Ricard	1.78	2.32	2.12	1.83	1.51	**-17.5**
Poliakov	La Martiniquaise	0.40	0.55	0.74	0.85	1.04	**22.4**

Regional *Vodkas*

VOLUME: MILLIONS OF 9-LITRE CASES

BRAND	OWNER	2007	2008	2009	2010	2011	% +/-
Parliament	CEDC	2.70	3.08	2.50	2.40	2.00	**-16.7**
Myagkov	SY Group	2.41	1.23	1.37	1.58	1.59	**0.9**
Gordon's	Diageo	1.30	1.30	1.30	1.30	1.20	**-7.7**
Bols	CEDC	1.67	1.85	1.85	1.60	1.10	**-31.3**
Soplica	CEDC	1.29	1.47	1.40	1.32	1.05	**-20.5**
Zubrowka	CEDC	1.00	1.00	1.03	1.18	1.03	**-12.7**

Local *Vodkas*

VOLUME: MILLIONS OF 9-LITRE CASES

BRAND	OWNER	2007	2008	2009	2010	2011	% +/-
Khlebny Dar	Bayadera Group	3.57	6.63	10.20	12.30	9.35	**-24.0**
Belenkaya	SY Group	2.04	2.25	2.81	4.92	7.07	**43.8**
Pyat Ozer	Alcohol Siberian Group	6.04	6.50	6.10	6.30	6.60	**4.8**
Czysta de Luxe (ZG)	Stock Spirits Group	0.08	1.87	5.39	6.40	4.60	**-28.1**
Krupnik	Belvédère	-	-	-	1.90	4.50	**136.8**
Svedka	Constellation Brands	1.53	2.10	2.90	3.41	3.69	**8.2**
Absolwent	CEDC	4.12	4.18	3.70	2.80	2.20	**-21.4**
Istynna	Olimp Corp	-	-	0.50	1.63	2.18	**33.7**
Magic Moments	Radico Khaitan	0.25	0.58	0.86	1.82	2.15	**18.1**
Glen's	Glen Catrine	1.70	1.80	1.90	2.10	2.10	**0.0**
Yamskaya	CEDC	-	2.16	2.40	2.61	2.00	**-23.4**
Zhuravli	CEDC	-	2.55	2.36	2.15	1.95	**-9.3**
Prime	Olimp Corp	0.94	1.51	1.51	1.60	1.85	**15.6**
White Mischief	United Spirits	1.26	1.57	1.90	1.87	1.70	**-9.1**
1906	Stock Spirits Group	0.74	0.83	1.39	1.70	1.70	**0.0**
Burnett's	Heaven Hill	1.00	1.20	1.52	1.52	1.68	**10.5**
Haoma	Kokshetauminvody AO	1.04	1.25	1.27	1.37	1.67	**22.1**
Romanov	United Spirits	0.98	1.17	1.25	1.59	1.63	**2.5**

▶ like the Pyat Oyzer brand) and then declining, such as Bayadera's Khlebny Dar or CEDC's Zelenaya Marka (Green Mark).

This is particularly the case for economy and standard brands where there is little loyalty among Russian and Ukrainian consumers and also little opportunity to grow brand equity before the next vodka comes along.

Only around half of the vodka brands saw any growth at all, and for many of them, like Smirnoff and Absolut, it was moderate growth. This was particularly the case for brands held by international companies.

Of those brands, SPI's Stolichnaya performed strongly with 6% growth, but that only returns it to its 2007 peak. Its growth has been driven by many of its smaller markets but, more importantly, by volumes stabilising in its core US market after years of decline.

Brown-Forman's Finlandia brand performed well thanks to strong growth in Russia, while Campari's Skyy and Bacardi's Grey Goose suffered for their over-reliance on the US. ■

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RUM & CACHAÇA

Core markets suffer but big-name acquisition could boost international standing

Bacardi's eponymous rum brand continues to be the global leader in the sector but its growth was weak, remaining below its 2007 level. The brand suffers from overexposure in its core markets of North America and western Europe, where it is struggling to maintain volumes, let alone grow them.

To counter the problems in these markets, Bacardi has attempted to move into the more dynamic dark and spiced rum category with the launch of its Oakheart variant, while in India it is having some success developing the white rum category, where Bacardi is seeing double-digit growth.

Second placed Tanduay also seems to be showing a certain maturity as – despite Philippine spirits volumes growing in the mid-single digits in 2011 thanks to a healthy economy – the brand's volumes grew by only 2%.

Many other leading brands in the category are local Indian rums, which is not that surprising as India accounts for 29% of global volumes and is seeing growth in the high-single digits.

Among the other international brands, perhaps the most interesting point to note is the slowing of Pernod Ricard's Havana Club. Despite strong growth in markets such as France and Germany, the brand suffered declines in its core markets of Cuba, Italy and Spain and from a change of distributor in a previous key growth market, Chile. It will be interesting to see whether this is just a blip or the start of a slow-down.

CACHAÇA

Sales of cachaça are still overly focused on its domestic market, Brazil. The category suffered there in 2011 with consumers trading up from traditional spirits to vodka and blended scotch, and this seems to have impacted the leading brand, Pirassununga 51. The other two brands to provide figures both saw low to mid-level growth, thanks in part to new product development.

Taking into account cachaça's lack of an international presence – except in some western European markets – perhaps the most interesting event during 2011 was Campari's acquisition of the premium Sagatiba brand. While obviously hoping to tap into the willingness of Brazilians to trade up, a major international company moving into the category could boost its global presence, especially in Campari's core markets of Italy, Germany and the US. Cachaça has a presence in Italy and Germany but has failed to quite hit the mainstream in the US. This acquisition might help change that.

Rum

VOLUME: MILLIONS OF 9-LITRE CASES

BRAND	OWNER	2007	2008	2009	2010	2011	% +/-	STATUS
Bacardi	Bacardi	19.90	19.64	18.60	19.28	19.56	**1.5**	Global
Tanduay	Tanduay Distillers	14.43	16.29	16.92	18.36	18.71	**1.9**	Local
McDowell's No.1 Celebration	United Spirits	7.63	9.67	11.17	13.89	15.63	**12.5**	Local
Captain Morgan	Diageo	7.80	8.30	8.80	9.00	9.20	**2.2**	Global
Havana Club	Pernod Ricard	3.00	3.40	3.28	3.77	3.84	**1.9**	Global
Contessa	Radico Khaitan	2.08	2.20	2.56	2.37	2.36	**-0.4**	Local
Old Cask	United Spirits	1.28	1.72	2.21	2.11	2.15	**1.9**	Local
Old Port Rum	Amrut Distilleries	1.64	1.91	1.66	1.82	2.01	**10.4**	Local
Montilla	Pernod Ricard	2.67	2.73	1.95	1.80	1.75	**-2.8**	Local
Cacique	Diageo	1.70	1.70	1.80	1.70	1.70	**0.0**	Regional
Madira XXX	Tilaknagar Industries	0.02	0.18	0.82	1.28	1.62	**26.6**	Local
Bagpiper Rum	United Spirits	-	-	0.99	1.45	1.45	**0.0**	Local
Appleton Jamaica Rum	Wray & Nephew	1.14	1.15	1.19	1.16	1.20	**3.5**	Global
Old Adventurer	United Spirits	1.12	1.20	1.23	1.05	1.01	**-3.8**	Local

Cachaça

VOLUME: MILLIONS OF 9-LITRE CASES

BRAND	OWNER	2007	2008	2009	2010	2011	% +/-	STATUS
Pirassununga 51	Companhia Müller de Bebidas	21.50	21.98	19.50	19.50	18.60	**-4.6**	Local
Pitú	Engarrafamento Pitú	9.31	9.51	9.60	10.10	10.49	**3.9**	Local
Velho Barreiro	Tatuzinho	7.15	7.40	7.70	8.00	8.40	**5.0**	Local
Ypioca	Gruppo Ypioca	7.13	7.05	6.83	6.89	n/a	**n/a**	Local

COGNAC & BRANDY

Asia and China spearhead growth for cognac, while brandy makes headway on domestic stage

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All three major cognac brands for which we have information saw good growth. For both the big two, Hennessy and Martell, growth was primarily driven by strong performances in Asia and, in particular, China. In addition, LVMH's Hennessy brand benefitted from volumes bouncing back in the world's biggest cognac market, the US. That said, cognac volumes in the market are not expected to reach their pre-recession peak until 2015.

There are no figures for the historically third biggest cognac brand, Rémy Martin, as the company did not wish to take part this year and, at the time of writing, no public information was available for the brand. But with growing exposure to the thriving Chinese market, as well as other Asian countries, the signs are that the brand has performed well.

It was, however, the smallest brand, Courvoisier, which saw the fastest rate of growth of all the cognac brands, which is quite an achievement considering its focus on the US and the declining UK market.

Courvoisier achieved its growth through strong product innovation, with a series of aged variants as well as products such as C by Courvoisier being launched. There was also a large amount of price promotion in the UK. Courvoisier represents more than half of UK cognac volume sales.

BRANDY

Leading the way in brandy was Alliance Global's Emperador brand, volumes of which leapt over the previous leader, United Spirits' McDowell's brand.

Emperador benefited from favourable conditions which saw strong growth in the high single digits in the domestic spirits market in 2011. This was down to strong economic growth and a number of elections (drinks are offered to voters at rallies to persuade them to attend). Yet the growth of Emperador itself was driven by strong innovation and marketing activity for the brand, with a key driver being the late 2010 launch of a light variant.

Many of the rest of the brandy brands are Indian ones. Brandy is primarily consumed in the south of India and it is interesting to see the rise of a more premium variant, McDowell VSOP.

The other big brand in the list, Campari's Dreher Brazilian brandy, also saw growth in 2011, which is a creditable performance in country where consumers are moving away from traditional local products.

Cognac

VOLUME: MILLIONS OF 9-LITRE CASES

BRAND	OWNER	2007	2008	2009	2010	2011	% +/-	STATUS
Hennessy	LVMH	4.74	4.49	4.25	4.65	4.93	**6.0**	Global
Martell	Pernod Ricard	1.61	1.54	1.46	1.75	1.86	**6.3**	Global
Courvoisier	Beam	1.17	1.19	1.02	1.20	1.34	**11.7**	Global
Rémy Martin	Rémy Cointreau	1.84	1.48	1.55	1.65	n/a	**n/a**	Global

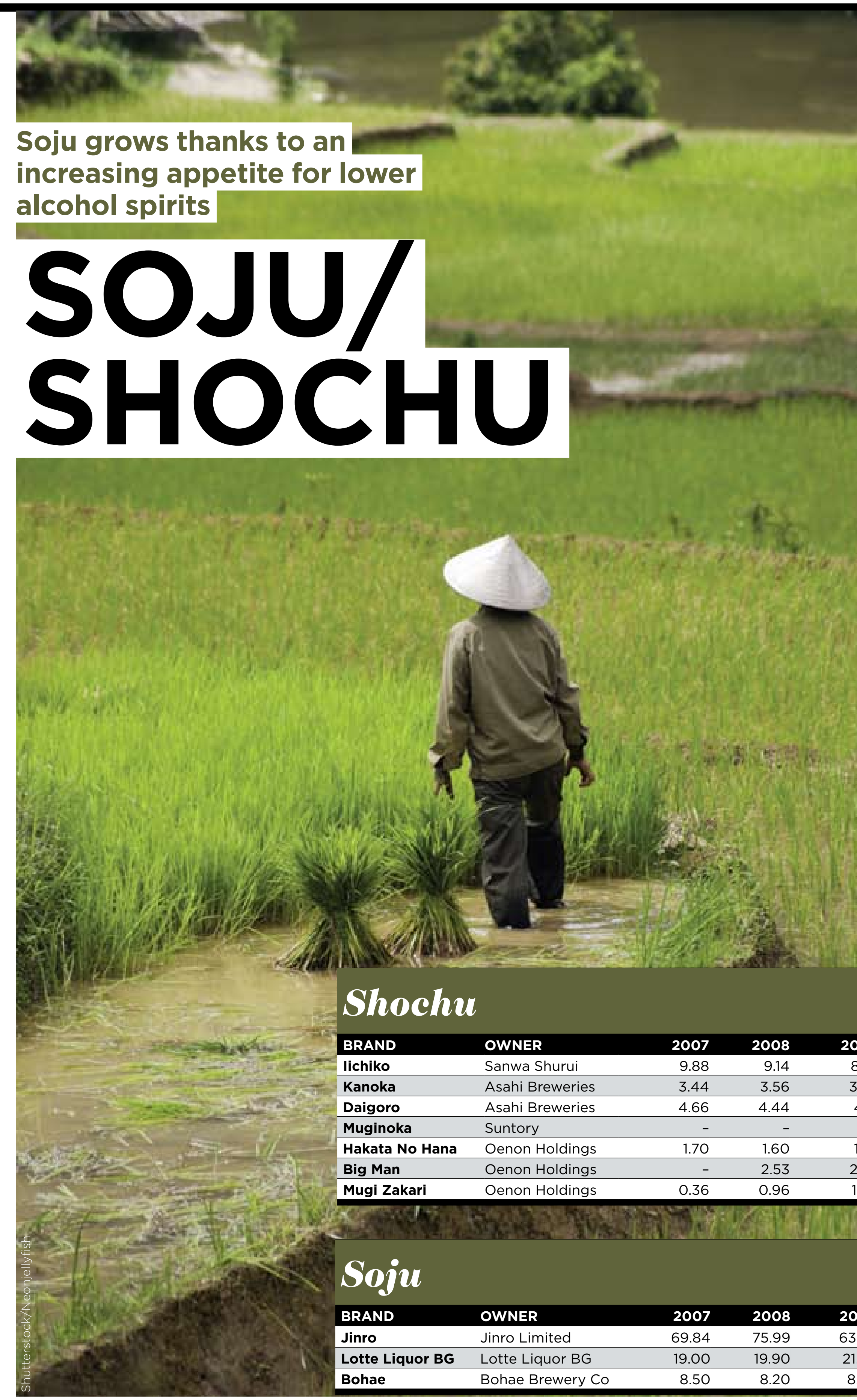
Brandy

VOLUME: MILLIONS OF 9-LITRE CASES

BRAND	OWNER	CATEGORY	2007	2008	2009	2010	2011	% +/-	STATUS
Emperador	Alliance Global Group	Brandy-Philippine	7.30	7.20	6.30	9.60	20.10	**109.4**	Local
McDowell's No.1	United Spirits	Brandy-Indian	7.64	7.53	9.22	11.54	11.72	**1.6**	Local
Mansion House	Tilaknagar Industries	Brandy-Indian	1.32	1.77	3.96	5.38	5.82	**8.2**	Local
Honey Bee	United Spirits	Brandy-Indian	2.20	2.82	3.60	4.37	4.75	**8.7**	Local
Dreher	Gruppo Campari	Brandy-Brazilian	3.75	3.60	3.45	3.50	3.57	**2.0**	Local
Old Admiral	Radico Khaitan	Brandy-Indian	1.40	1.40	1.81	2.99	3.24	**8.4**	Local
McDowell's VSOP	United Spirits	Brandy-Indian	-	-	0.03	0.64	1.40	**118.8**	Local
Paul Masson Grande Amber	Constellation Brands	Brandy-US	1.29	1.35	1.36	1.36	1.31	**-3.7**	Local
Christian Brothers	Heaven Hill	Brandy-US	1.15	1.17	1.18	1.18	1.15	**-2.5**	Local
Silver Cup	Amrut Distilleries	Brandy-Indian	0.79	1.42	0.86	0.66	1.06	**60.6**	Local
John Exshaw	United Spirits	Brandy-Indian	1.49	1.77	1.48	1.28	1.01	**-21.1**	Local

Soju grows thanks to an increasing appetite for lower alcohol spirits

SOJU/ SHOCHU



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South Korean soju continued to grow as a category in 2011. The key growth driver is Koreans' increasing preference for products with a lower alcohol content. But this trend was not enough for a number of the brands to see some growth, including the country's and world's number one, Jinro.

Jinro suffers from being the dominant brand in a slow growth market. In 2011, it sold 48% of Korean soju volumes.

The one brand that did see growth was Lotte Liquor, which continued to benefit from its aggressive promotional activity into the city of Busan.

Soju brands' strengths are based on sales in a particular region, thus in the mature South Korean soju category a major way to see strong growth is to look to move into the territory of other soju producers.

By contrast, in Japan, shochu volumes declined. The category was hit by a series of natural disasters in the main production region Kyushu and a fall in consumption of economy brands.

In 2011 the area was hit by bird flu, a volcanic eruption and an outbreak of foot and mouth.

Economy shochu brands such as Mugi Zakari and Big Man suffered volume falls due to price rises, which caused poorer shochu consumers to drink less.

Prior to the price increases many of these products were sold at below the cost of production.

Another factor in the rapid rise and fall of shochu brand volumes seems to be the relatively short shelf-life of brands. Economy shochus are regularly replaced by new ones.

Shochu

VOLUME: MILLIONS OF 9-LITRE CASES

BRAND	OWNER	2007	2008	2009	2010	2011	% +/-	STATUS
Iichiko	Sanwa Shurui	9.88	9.14	8.74	8.32	8.16	**-1.9**	Local
Kanoka	Asahi Breweries	3.44	3.56	3.66	3.84	3.59	**-6.5**	Local
Daigoro	Asahi Breweries	4.66	4.44	4.17	3.74	2.93	**-21.7**	Local
Muginoka	Suntory	–	–	–	1.66	1.92	**15.7**	Local
Hakata No Hana	Oenon Holdings	1.70	1.60	1.52	0.89	1.70	**91.0**	Local
Big Man	Oenon Holdings	–	2.53	2.43	2.11	1.69	**-19.9**	Local
Mugi Zakari	Oenon Holdings	0.36	0.96	1.60	1.78	1.45	**-18.5**	Local

Soju

VOLUME: MILLIONS OF 9-LITRE CASES

BRAND	OWNER	2007	2008	2009	2010	2011	% +/-	STATUS
Jinro	Jinro Limited	69.84	75.99	63.98	64.28	61.38	**-4.5**	Local
Lotte Liquor BG	Lotte Liquor BG	19.00	19.90	21.20	22.60	23.90	**5.5**	Local
Bohae	Bohae Brewery Co	8.50	8.20	8.20	7.60	7.40	**-2.6**	Local

Interesting times for other categories as cocktails drive move to different ingredients

OTHER CATEGORIES

Of the categories not covered in other sections there are a number of interesting developments. The bitters category has seen brands with the most dynamic growth, with Fernet Branca and Aperol growing at 20% and 30% respectively. Fernet Branca's growth is founded on the continued strong performance of bitters in Argentina. There, the brand dominates its category and consequently benefited from the double-digit volume growth in 2011.

Aperol's growth was driven by its two main markets, Italy and Germany. The orange-flavoured bitter has seen strong growth thanks to the Aperol Spritz cocktail (Aperol, prosecco and soda water) capturing the imagination of first Italian but then German consumers.

The largest bitters brand, Jägermeister, saw moderate growth in 2011. This is due to stagnant or declining volumes in its two main markets, the US and Germany, which was countered by rapid growth in markets such as the UK and from small bases in France and Spain.

Anis brands have seen a surprising leap in volumes, although this was due to French stockists "pre-buying" brands before an excise duty rise at the start of 2012. Next year's volumes should see an equally large fall as a consequence.

In gin the key factor driving growth in international or regional brands is trading up to more premium products. Those brands which have a premium or super-premium element, such as Bombay, Beefeater and Tanqueray have all seen growth in 2011. Those that do not (Gordon's and Seagram) have suffered.

LIQUEURS

With the exception of the local Polish liqueur Lubelska, liqueur brands struggled for growth in 2011. The world's leading liqueur, Baileys, saw sluggish growth. Declines and stagnation in core western European markets were just overcome by rapid growth in emerging markets such as Russia and Brazil.

The number two brand, ▶ page 34

Bitters

VOLUME: MILLIONS OF 9-LITRE CASES

BRAND	OWNER	2007	2008	2009	2010	2011	% +/-	STATUS
Jägermeister	Mast-Jägermeister	6.32	6.41	6.41	6.58	6.77	**2.9**	Global
Fernet Branca	Fratelli Branca Distillerie	3.12	3.28	3.31	3.85	4.63	**20.3**	Global
Campari	Gruppo Campari	2.93	2.93	2.70	2.80	2.87	**2.5**	Global
Aperol	Gruppo Campari	1.15	1.30	1.65	1.95	2.55	**30.8**	Regional
Amaro Ramazzotti	Pernod Ricard	1.18	1.22	1.00	1.23	1.22	**-0.8**	Regional

Liqueurs

VOLUME: MILLIONS OF 9-LITRE CASES

BRAND	OWNER	2007	2008	2009	2010	2011	% +/-	STATUS
Baileys	Diageo	7.70	7.60	6.70	6.70	6.80	**1.5**	Global
De Kuyper range	Koninklijke De Kuyper/Beam	4.90	4.74	4.40	4.32	4.21	**-2.6**	Global
Malibu	Pernod Ricard	3.63	3.70	3.23	3.40	3.68	**8.2**	Global
Lubelska	Stock Spirits Group	0.29	0.50	0.60	1.50	2.00	**33.3**	Local
Southern Comfort	Brown-Forman	2.48	2.38	2.23	2.14	1.97	**-8.3**	Global
Kahlúa	Pernod Ricard	2.14	2.00	1.69	1.70	1.72	**1.2**	Global
Choya	Choya Umeshu Co	-	-	-	-	1.67	**0.0**	Local
Amarula	Distell Group	1.08	1.08	1.10	1.20	1.30	**8.3**	Global
Bols range	Lucas Bols	1.26	1.28	1.30	1.40	n/a	**n/a**	Global

De Kuyper, suffered from a decline in its major market, the US.

Third-placed Malibu benefitted from a recovery in volume sales in its key market the US, driven by extensive new product development and by teaming up with R&B star Ne-Yo.

The other liqueurs brand that performed particularly well was Distell's Amarula, thanks to strong growth in Brazil.

TEQUILA

In tequila, both Sauza and El Jimador struggled for growth. In part this seems to be down to consumers in the US (the key growth market for the category) trading up, which in turn boosted Patrón tequila's growth.

Sauza's rise may also have been affected by the fact that its strong growth in 2010 was, at least in part, due to extensive new product development, which somewhat lessened in 2011.

BAIJIU

For the first time this year, the supplement has a substantial number of Chinese baijiu brands. Accounting for volumes sales of 4.1 billion litres in 2011 (around 25% of global spirits volumes), the category is huge and growing strongly (5% up in 2011).

Baijiu is also a highly fragmented category, with the category's leading brand, Red Star Er Guo Tou, accounting for only 3% of the country's volumes.

The brand has grown rapidly over the review period, which is due to its economy price point and targeting of less well-off consumers as well as consumers in second and third-tier cities.

The other two Chinese brands, Mian Zhu Jiu and Jingzhi Baigan, are also economy brands but, as the names of their owners suggest, they are not even regional brands, but brands focused on a particular province.

The one non-Chinese baijiu brand is the Taiwanese Kinmen Kaoliang. It has 70% of the category and, along with the category as a whole, has benefited from an increase in Chinese tourists following the Taiwanese government's lifting of restrictions on Chinese tourists coming into the country.

PISCO

Capel which, together with Compañía Cervecerías Unidas, occupies 90% of the Chilean pisco market, benefited from a stable domestic scene and encouraging exports to the US and Brazil last year. ■

Tequila

VOLUME: MILLIONS OF 9-LITRE CASES

Brand	OWNER	2007	2008	2009	2010	2011	%+-	
Sauza	Beam	3.21	3.13	2.63	3.02	3.01	**-0.3**	Global
Patrón Tequila	Patrón Spirits	1.60	1.73	1.74	1.76	1.88	**6.5**	Global
El Jimador	Brown-Forman	0.92	1.02	1.10	1.19	1.21	**1.4**	Local

Baijiu

VOLUME: MILLIONS OF 9-LITRE CASES

Brand	OWNER	2007	2008	2009	2010	2011	%+-	
Red Star Er Guo Tou	Beijing Red Star Co	6.02	7.19	8.89	10.94	13.68	**25.0**	Local
Mian Zhu Jiu	Sichuan Jian Nan Chun (Group)	-	-	3.45	3.87	4.15	**7.2**	Local
Jingzhi Baigan	Shandong JingZhi Distillery	-	-	-	-	4.12	**0.0**	Local
Kinmen Kaoliang	Kinmen Kaoliang Liquor Inc	1.88	2.15	2.03	2.15	2.27	**5.6**	Local

Other categories

VOLUME: MILLIONS OF 9-LITRE CASES

BRAND	OWNER	2007	2008	2009	2010	2011	% +/-	STATUS
AGUARDIENTE								
Aguardiente Nectar	Empresa de Licores de Cundinamarca	1.37	1.31	1.39	1.51	1.70	**12.3**	Local
ANIS								
Ricard	Pernod Ricard	5.78	5.52	5.37	5.38	6.20	**15.2**	Global
Pastis 51	Pernod Ricard	1.49	1.41	1.34	1.27	1.44	**13.4**	Regional
PISCO								
Capel	Cooperativa Agricola Pisquera de Elqui	1.32	1.37	1.11	1.07	1.08	**0.9**	Local
RAKI								
Yeni Raki	Diageo	-	-	3.40	3.90	4.10	**5.1**	Local

MAJOR PLAYERS

Pernod Ricard and United Spirits are on parity with 22 Millionaire brands each, though their strategies are far from the same

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Pernod Ricard remained the international player with the most number of brands in the millionaires supplement, with 22 brands. This is up one from last year and thanks to the strong growth of its local Brazilian vodka brand Orloff.

Behind Pernod is Diageo which saw its number of million case brands in the list increase by two to 16, thanks to the acquisition of the Yeni Raki brand in 2011 and the rapid organic growth of its super-premium vodka brand, Cîroc.

A number of other international companies saw the number of brands in the rankings increase. Campari had the addition of its Wild Turkey brand, which it acquired from Pernod Ricard in 2009, while William Grant saw its Glenfiddich single malt scotch surpass the million case mark.

Other international companies saw the number of millionaire brands fall. To little surprise Bacardi's Castillo ▶ page 38

Pernod Ricard

BRAND	CATEGORY	2007	2008	2009	2010	2011	% +/-	STATUS
Royal Stag	Whisky-Indian	5.63	6.76	8.40	10.39	12.49	**20.2**	Local
Absolut	Vodka	10.73	10.73	10.03	10.90	11.21	**2.8**	Global
Imperial Blue	Whisky-Indian	3.13	3.83	4.83	6.11	7.17	**17.3**	Local
Ballantine's	Whisky-scotch	6.17	6.50	5.76	6.18	6.47	**4.7**	Global
Ricard	Anis	5.78	5.52	5.37	5.38	6.20	**15.2**	Global
Chivas Regal	Whisky-scotch	4.37	4.57	3.87	4.50	4.89	**8.7**	Global
Havana Club	Rum	3.00	3.40	3.28	3.77	3.84	**1.9**	Global
Jameson	Whiskey-Irish	2.48	2.73	2.74	3.17	3.78	**19.2**	Global
Malibu	Liqueurs	3.63	3.70	3.23	3.40	3.68	**8.2**	Global
Blenders Pride	Whisky-Indian	1.51	1.92	2.31	2.82	3.46	**22.7**	Local
Seagram's	Gin	3.44	3.38	3.03	2.93	2.77	**-5.5**	Regional
Beefeater	Gin	2.42	2.41	2.24	2.33	2.39	**2.6**	Global
Clan Campbell	Whisky-scotch	1.64	1.72	1.76	1.76	1.96	**11.4**	Regional
Martell	Cognac	1.61	1.54	1.46	1.75	1.86	**6.3**	Global
Montilla	Rum	2.67	2.73	1.95	1.80	1.75	**-2.8**	Local
Kahlúa	Liqueurs	2.14	2.00	1.69	1.70	1.72	**1.2**	Global
100 Pipers	Whisky-scotch	2.50	2.25	2.03	1.73	1.71	**-1.2**	Global
Wyborowa	Vodka	1.78	2.32	2.12	1.83	1.51	**-17.5**	Global
Pastis 51	Anis	1.49	1.41	1.34	1.27	1.44	**13.4**	Regional
Amaro Ramazzotti	Bitters	1.18	1.22	1.00	1.23	1.22	**-0.8**	Regional
Orloff	Vodka	-	-	-	1.02	1.08	**5.9**	Local
Luksusowa	Vodka	1.47	1.76	0.87	1.14	1.02	**-10.5**	Local

United Spirits

BRAND	CATEGORY	2007	2008	2009	2010	2011	% +/-	STATUS
McDowell's No.1	Whisky-Indian	11.46	13.39	13.52	14.32	16.08	**12.3**	Local
Bagpiper	Whisky-Indian	13.95	15.41	16.26	16.39	15.98	**-2.5**	Local
McDowell's No.1 Celebration	Rum	7.63	9.67	11.17	13.89	15.63	**12.5**	Local
McDowell's No.1	Brandy-Indian	7.64	7.53	9.22	11.54	11.72	**1.6**	Local
Old Tavern	Whisky-Indian	2.84	4.77	6.84	9.08	11.07	**21.9**	Local
Hayward's	Whisky-Indian	2.31	2.77	4.06	4.65	6.16	**32.5**	Local
Honey Bee	Brandy-Indian	2.20	2.82	3.60	4.37	4.75	**8.7**	Local
Director's Special	Whisky-Indian	3.69	4.00	4.39	4.54	4.52	**-0.4**	Local
Gold Riband	Whisky-Indian	1.63	1.84	2.68	2.25	3.07	**36.4**	Local
Director's Special Black	Whisky-Indian	1.34	1.77	2.03	2.88	2.92	**1.4**	Local
McDowell's Green Label	Whisky-Indian	1.83	1.70	1.99	2.53	2.92	**15.4**	Local
Old Cask	Rum	1.28	1.72	2.21	2.11	2.15	**1.9**	Local
White Mischief Vodka	Vodka	1.26	1.57	1.90	1.87	1.70	**-9.1**	Local
Romanov	Vodka	0.98	1.17	1.25	1.59	1.63	**2.5**	Local
Signature	Whisky-Indian	0.76	0.99	1.14	1.32	1.56	**18.2**	Local
Bagpiper Rum	Rum	-	-	0.99	1.45	1.45	**0.0**	Local
McDowell's VSOP	Brandy	-	-	0.03	0.64	1.40	**118.8**	Local
Royal Challenge	Whisky-Indian	1.17	1.29	1.27	1.16	1.35	**16.4**	Local
Carew's Dry	Gin	0.45	0.54	0.66	0.79	1.08	**36.7**	Local
John Exshaw	Brandy-Indian	1.49	1.77	1.48	1.28	1.01	**-21.1**	Local
Old Adventurer	Rum	1.12	1.20	1.23	1.05	1.01	**-3.8**	Local
Blue Riband	Gin	0.96	0.99	1.09	1.13	1.00	**-11.5**	Local

brand volumes fell below a million cases in 2011 following years of decline while Beam lost the Windsor Canadian Whisky brand.

LOCAL PLAYERS

In terms of local players United Spirits joined Pernod Ricard as the joint leading company in the supplement with two new additions, taking its total to 22. Both increases were a result of organic growth of two brands, McDowell's VSOP brandy and Carew Dry Gin.

Of the other local players it is perhaps most interesting to look at CEDC, where the performance of its brands seem symptomatic of the problems of the company, with all eight of the brands seeing volume declines of at least 9%. It is thus hardly surprising that it needed the financial support of Roust.

CEDC's problems in 2011 were in part due to the changing dynamics of the Polish spirits market and in particular vodka. This can be further seen by the performances of other producers with exposure to the Polish market, notably Stock Spirits and Belvédère.

Vodka producers are suffering from a declining category as consumers switch to more premium international spirits categories, such as whiskies, but also much stiffer competition with a number of cheap, high quality heavily promoted brands introduced in recent years.

"CEDC's problems were in part due to the changing dynamics of the Polish spirits market"

The trend started with Stock Spirits' Czysta de Luxe, which launched at the end of 2007 and saw phenomenal growth up until 2010.

Yet it – along with more established brands such as Belvédère's Starogardzka (which was badly hit by Czysta de Luxe's performance) – was impacted by Belvédère's launch of Krupnik in 2011.

Diageo

BRAND	CATEGORY	2007	2008	2009	2010	2011	% +/-	STATUS
Smirnoff	Vodka	24.30	25.70	24.40	24.40	24.70	**1.2**	Global
Johnnie Walker	Whisky-scotch	15.80	16.30	15.30	16.90	18.00	**6.5**	Global
Captain Morgan	Rum	7.80	8.30	8.80	9.00	9.20	**2.2**	Global
Baileys	Liqueurs	7.70	7.60	6.70	6.70	6.80	**1.5**	Global
Crown Royal	Whisky-Canadian	5.00	5.10	4.90	5.00	5.00	**0.0**	Global
J&B Rare	Whisky-scotch	5.90	5.90	5.10	4.80	4.80	**0.0**	Global
Gordon's	Gin	4.50	4.30	4.20	4.30	4.30	**0.0**	Global
Yeni Raki	Raki	–	–	3.40	3.90	4.10	**5.1**	Local
Bell's	Whisky-scotch	2.30	2.20	2.30	2.40	2.50	**4.2**	Global
Seagram's 7 Crown	Whiskey-US-other	2.50	2.50	2.50	2.50	2.40	**-4.0**	Regional
Tanqueray	Gin	2.20	2.10	2.00	2.00	2.10	**5.0**	Global
Cacique	Rum	1.70	1.70	1.80	1.70	1.70	**0.0**	Regional
Buchanan's	Whisky-scotch	1.60	1.50	1.30	1.40	1.60	**14.3**	Regional
Cîroc	Vodka	–	–	0.40	0.90	1.50	**66.7**	Local
Gordon's	Vodka	1.30	1.30	1.30	1.30	1.20	**-7.7**	Regional
Seagram's VO	Whisky-Canadian	1.30	1.30	1.20	1.10	1.10	**0.0**	Regional

CEDC

BRAND	CATEGORY	2007	2008	2009	2010	2011	% +/-	STATUS
Zelenaya Marka (Green Mark)	Vodka	8.10	11.97	11.25	10.85	9.30	**-14.3**	Global
Absolwent	Vodka	4.12	4.18	3.70	2.80	2.20	**-21.4**	Local
Yamskaya	Vodka	–	2.16	2.40	2.61	2.00	**-23.4**	Local
Parliament	Vodka	2.70	3.08	2.50	2.40	2.00	**-16.7**	Regional
Zhuravli	Vodka	-	2.55	2.36	2.15	1.95	**-9.3**	Local
Bols	Vodka	1.67	1.85	1.85	1.60	1.10	**-31.3**	Regional
Soplica	Vodka	1.29	1.47	1.40	1.32	1.05	**-20.5**	Regional
Zubrowka	Vodka	1.00	1.00	1.03	1.18	1.03	**-12.7**	Regional

Beam

BRAND	CATEGORY	2007	2008	2009	2010	2011	% +/-	STATUS
Jim Beam	Whiskey-US-bourbon	5.24	5.16	5.08	5.30	5.86	**10.6**	Global
Sauza	Tequila	3.21	3.13	2.63	3.02	3.01	**-0.3**	Global
Teacher's	Whisky-scotch	1.98	1.96	1.73	1.89	2.05	**8.5**	Global
Canadian Club	Whisky-Canadian	2.04	1.96	1.89	1.92	1.93	**0.5**	Global
Courvoisier	Cognac	1.17	1.19	1.02	1.20	1.34	**11.7**	Global
Maker's Mark	Whiskey-US-bourbon	0.79	0.85	0.89	1.03	1.18	**14.6**	Local
DYC	Whisky-Spanish	1.43	1.22	1.19	1.17	1.04	**-11.1**	Local
Kamchatka	Vodka	0.94	0.94	1.00	1.05	1.02	**-2.9**	Local