

Millionaires

2009



VODKA
FROM THE
LAND OF
THE WOLF

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Introduction

Spirits world keeps on turning

The recently released Annual Millionaire Outlook survey by Fidelity Investments in the US showed that 46% of US dollar-millionaires “do not feel wealthy” – more than twice the level in the same survey last year.

At the same time the UK's Centre for Economics and Business Research (CEBR) reported at the end of May that the number of UK millionaires has fallen from a peak of 489,000 in 2007 to 242,000. Sales of Bentley cars, the report notes, were down 66% for the year to date.

All the more encouraging then that, at a global level, the spirits world is showing surprisingly few signs of suffering seriously from the worldwide crash.

For some brands, and for categories such as Cognac, a dependence for volumes on individual markets such as the US, UK or Spain may have been particularly damaging as they were the first and most seriously affected by the recession.

However, take one look at the tables of fastest growing brands on p12-13 and you'll see some seriously impressive numbers. It's here that the importance of the regional and the domestic/local brands becomes clear.

In emerging markets such as India, China, Asia Pacific in general, South Africa and South America, economies that were less geared to the heady pressures of the global financial system have not suffered such serious setbacks, and the continued growth in consumption of spirits suggests there are

David Longfield

Supplement editor



happy hunting grounds still out there to be found for spirits producers.

A second report from CEBR this month says that in 2009 the western world will drop below 50% of world GDP for the first time – six years earlier than initially expected – and is forecast to drop to 45% by 2012.

It will be no surprise if the figures in next year's Millionaires Club supplement show the big international names struggling further as the knock-on effects of the recession are felt through 2009. At the same time, there are few reasons to assume that the regional and domestic/local players won't have an even better time of it this year..

The Drinks International Millionaires Club is an annual listing of distilled spirits brands with sales of a million 9-litre cases or more. Research is conducted independently by Euromonitor International and brands are classified under the following guidelines:

- Domestic/local (90% or more of volumes sold in a particular country);**
- Regional (80% or more of volumes sold in a particular region);**
- International (sold in at least two regions and no more than 80% in any one region)**

Independently researched market intelligence

The alcoholic drinks industry is a key research segment for market intelligence company Euromonitor International. With more than 800 analysts researching 205 countries worldwide, Euromonitor International provides global strategic intelligence on industries, countries and consumers. On an annual basis we publish internationally comparable statistics, market research reports focusing

on trends and opportunities in the industry, as well as news analysis from industry experts. Our global information system, Passport, is used by the world's leading alcoholic drinks companies to support 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



making sense of global markets

consumer trends. As a dedicated fast moving consumer goods research house, we understand the dynamics of the consumer market and, with more than 35 years of experience, have unrivalled expertise in this sector.

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Better times ahead

Despite the inevitable impact of the global economic situation, the outlook for the spirits sector is anything but gloomy, says Euromonitor International senior alcoholic drinks analyst Jeremy Cunnington

In Euromonitor International's second year of researching the Millionaires Club we continue to add new depth to the list, with 16 brands featured in the tables for the first time this year. This number includes a couple of new shochu producers from Japan, notably Sanwa Shurui's 9-million case Lichiko brand, as well as additional vodka brands from the east of Europe, led by Bayadera's 6+ million case Hlebnyi Dar brand from Ukraine.

Domestic/local brands are the most prevalent in the list with 74 entries, with international brands accounting for 56 brands and regional brands making up the rest. This shows that, despite steps made by international companies to push their leading brands into new markets, the global spirits market is still founded upon domestic/local brands, which again accounted for more than half of the volumes – a figure that underplays their role in total spirits bearing in mind the number of domestic/local brand producers not wishing to participate in the list this year, especially in the Asia-Pacific region.

In terms of categories, Vodka remained the most numerous with 42 brands, although the two whisky sections (Scotch and Whiskies of the



making sense of global markets

World) together totaled 43. The other major category was Cognac & Brandy, which had 15 entries combined. Other spirits products, such as baijiu, anis, soju, shochu and cachaça, also made up 15 brands of the list.

The key region for spirits consumption globally is still Asia-Pacific, as can be seen by the large proportion of other spirits (about 50% of global volumes), and whisk(e)y volumes. In 2008, the Asia-Pacific region accounted for just under 50% of total spirits consumption. Next biggest region was Latin America, with 17% of volumes, then eastern Europe with just over 10%, followed by western Europe and North America, each with just under 10% of volumes. Australasia, unsurprisingly, was the smallest with fewer than 4% of global sales.

The company with the most entries (see Major

Players, p14) was Pernod Ricard, now at 22 entries with the addition of the Absolut and Luksusowa brands from the V&S acquisition. It is now followed by United Spirits, clearly in second place with 17 brands following the addition of its Romanov vodka, while Diageo fell back to third with only 15 brands, following its VAT 69 Scotch falling below the million case volume mark.

In terms of actual cases sold, Diageo still leads with 87.7 million cases for its 15 brands. In second place is Jinro with its chart-topping 76-million case Jinro Soju brand, closely followed by United Spirits and Pernod Ricard with 74 and 73 million cases respectively.

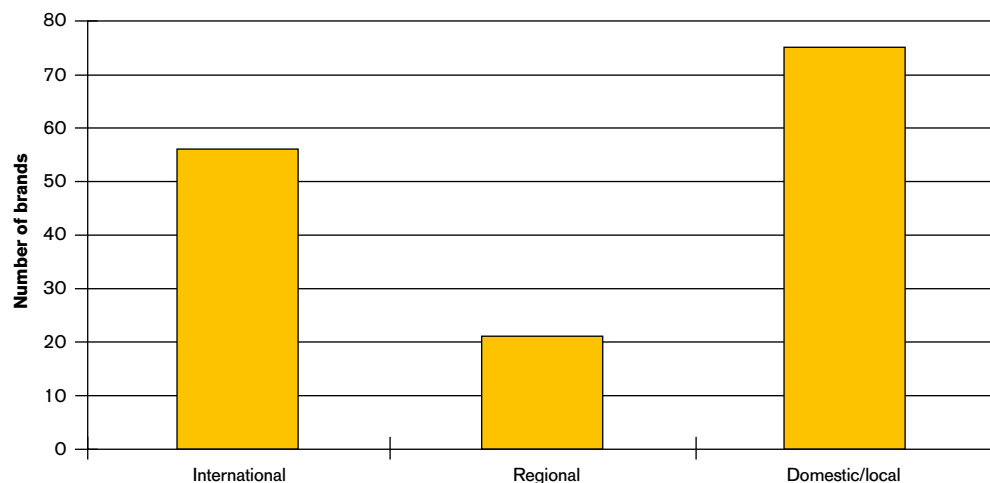
Crisis conditions start to take effect

Although the current global economic crisis did not hit until the latter part of 2008, the 2009 Millionaires list has already started to show the effects of the recession. Brands have certainly been affected, especially those with large volumes in the US, UK, Ireland and Spain – in other words, those who have been in recession longest.

Brands with large volumes in emerging markets, especially eastern Europe, kept things going – witness the strong growth in Polish vodka brands (and some Russian ones) – although the collapse in export markets for China and countries in Indochina did hit sales of premium spirits there, such as Scotch brands. ▶

Although the current global economic crisis did not hit until the latter part of 2008, the 2009 Millionaires list has already started to show the effects of the recession

Brand Category Split



Market sizes – historic – total volume – '000 litres

2008 volumes	Asia-Pacific	Australia	Eastern Europe	Latin America	Middle East & Africa	North America	Western Europe	World
Other spirits	6,589,642	735	275,405	1,349,830	33,039	13,321	453,119	8,715,090
White spirits	501,700	13,262	2,556,226	91,408	42,819	649,185	365,732	4,220,333
Whisk(e)y	1,082,369	31,643	48,498	135,276	78,692	450,112	431,244	2,257,835
Rum	383,388	7,868	11,998	412,644	13,912	252,014	172,976	1,254,799
Brandy and Cognac	514,027	2,942	189,015	137,976	67,319	103,385	182,255	1,196,919
Liqueurs	49,153	11,000	135,021	82,769	20,284	196,784	365,387	860,398
Tequila (and Mezcal)	3,166	819	3,851	101,144	3,902	104,347	10,963	228,193
Total:	9,123,444	68,269	3,220,013	2,311,048	259,968	1,769,148	1,981,676	18,733,566

The two general, recession-led negative trends to hit spirits – trading down and a move away from on-trade consumption – have been most clearly seen in the US, the country which has been in recession the longest.

Consumer trading-down in the US has been most clearly seen in vodka, where economy level products such as Popov, Burnett's, McCormick and Svedka have all seen strong growth in 2008. In contrast, US-focused premium brand Grey Goose saw volumes stagnate after years of dynamic growth. The move away from premium products can also be seen in drops in volumes for the world's two leading Cognac brands, Hennessy and Rémy Martin. Both counted the US as their largest markets, and both saw global volumes fall as a result of declining volume sales in the US.

That's not to say that trading down has been universal and there are still consumers in the US with sufficient wealth and confidence to indulge in super-premium tequila Patrón, which saw volumes up 8%.

Consumer movement away from the on-trade can be seen in the Liqueurs category, many of which have a strong US on-trade focus. Brands such as De Kuyper and Southern Comfort, with strong US on-trade presence, suffered declines, while the failing US on-trade also held back the volume growth of the cult favourite Jägermeister bitters brand. Strong growth in emerging markets such as South Africa, and increased focus on the US off-trade, allowed Jack Daniel's to counter the steep decline in western Europe where, in markets



such as the UK and Spain, it is mainly an on-trade brand. Additionally, volumes of Spain-centric Scotch brands such as J&B and Ballantine's were hit by the steep decline in Scotch, which is predominantly consumed in the on-trade.

Forecast – trouble in the short term

For eastern Europe, sinking into deep recession, growth prospects look bleak, especially for international brands. Anecdotal evidence suggests many of the trends that showed themselves in the US, UK, Ireland and Spain in 2008 have spread around the world, ie trading down to cheaper products and the on/off-trade consumer switching phenomenon.

So premium (in the main, international) brands in many markets are likely to suffer badly

in 2009. In addition, as international companies look after their balance sheets they are less likely to invest as much in fast-growing emerging markets, focusing instead on maintaining their core market volumes and hence cash-flow.

The one bright spot, however, could well be the Asia-Pacific region, where economies such as China and India are still growing strongly, and in the former case have already begun to recover from the steep export decline at the end of 2008.

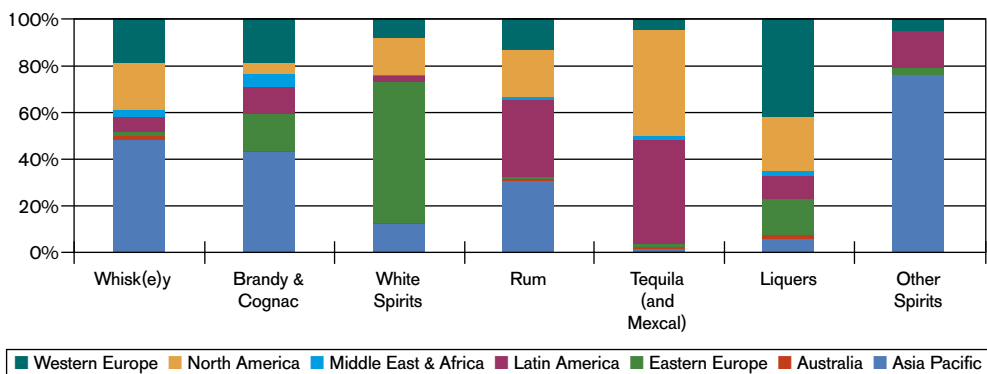
In any case it is worth international companies especially remembering that, although volumes can fall during an economic crisis they can also rise quickly again once recovery begins, as has been seen with Scotch in recent region-wide economic crises – Asia-Pacific in 1998 and Latin America in 2002.

In the 1998 Asia-Pacific crisis volume sales of blended Scotch declined by over 20% during that year, before returning to growth in 1999 (17%), and by the end of 2000 regional volumes exceeded the 65 million litres sold in 1997.

The same effect was seen more recently in Latin America. The economic crisis there led to steep declines in volumes in 2002 and 2003 before they picked up again in 2004, exceeding its previous 2001 peak of 80 million litres in 2005.

There is no reason to suggest this will not be repeated again, as the underlying factors driving growth in the global spirits market remain.

Category Split by Region in 2008



Diageo, Pernod retain hold on internationals



With its seven entries, Diageo is the leading company in terms of numbers in the Top 30 international brands, including two of the top three brands. Smirnoff and Johnnie Walker continue to reign unchallenged in their respective worlds of vodka and whisky.

Smirnoff was still the biggest selling International spirits brand in 2008, carrying on

its relentless march. As in 2007 Smirnoff saw the largest actual volume increase of any of the Top 30 brands, at 1.4m cases, with Johnnie Walker and Captain Morgan also performing strongly for Diageo.

Pernod is the next largest company in the Top 30 list with six brands. The company has been greatly boosted by the acquisition of the fourth ▶

Millionaires Club 2009: Top 30 International brands


Brand	Owner	Category	2004	2005	2006	2007	2008	% +/-
Smirnoff	Diageo	Vodka	20.10	21.30	23.00	24.30	25.70	5.8
Bacardi	Bacardi	Rum	19.50	20.10	20.00	19.90	19.64	-1.3
Johnnie Walker	Diageo	Whisky – Scotch	12.00	12.80	14.30	15.80	16.30	3.2
Absolut	Pernod Ricard	Vodka	8.50	9.20	9.80	10.73	10.73	0.0
Jack Daniel's	Brown-Forman	Whiskey – American-Tennessee	7.64	8.38	8.94	9.33	9.52	2.0
Pitú	Engarramento Pitú	Cachaça	7.62	7.78	8.53	9.31	9.51	2.1
Nemiroff	Nemiroff Ukrainian Vodka Co	Vodka	7.28	9.32	7.80	8.89	8.55	-3.8
Captain Morgan	Diageo	Rum	6.30	6.90	7.30	7.80	8.30	6.4
Baileys	Diageo	Liqueurs	6.80	6.70	7.10	7.70	7.60	-1.3
Velho Barreiro	Tatuzinho	Cachaça	6.50	6.90	7.08	7.15	7.40	3.5
Ballantine's	Pernod Ricard	Whisky – Scotch	5.68	5.63	5.62	6.17	6.50	5.3
Jägermeister	Mast-Jägermeister	Bitters	4.50	5.20	5.95	6.32	6.41	1.4
J&B Rare	Diageo	Whisky – Scotch	6.00	5.90	5.90	5.90	5.90	0.0
Ricard	Pernod Ricard	Anis	6.03	5.72	5.66	5.78	5.52	-4.5
Jim Beam	Beam Global Spirits & Wine	Whiskey – American-Bourbon	n/a	n/a	5.12	5.24	5.16	-1.5
Crown Royal	Diageo	Whisky – Canadian	4.20	4.50	4.70	5.00	5.10	2.0
William Grant's	William Grant & Sons	Whisky – Scotch	4.12	4.10	4.39	4.79	4.97	3.7
De Kuyper range	Koninklijke De Kuyper/ Beam Global Spirits & Wine	Liqueurs	4.86	4.78	4.90	4.90	4.74	-3.3
Chivas Regal	Pernod Ricard	Whisky – Scotch	3.29	3.81	3.95	4.37	4.58	4.8
Hennessy	LVMH	Cognac	3.73	3.80	4.30	4.73	4.48	-5.3
Gordon's	Diageo	Gin	5.30	5.00	5.00	4.50	4.30	-4.4
Malibu	Pernod Ricard	Liqueurs	2.96	3.23	3.33	3.63	3.70	1.9
Grey Goose	Bacardi	Vodka	1.80	2.30	3.00	3.60	3.60	0.0
Dewar's	Bacardi	Whisky – Scotch	3.50	3.50	3.40	3.50	3.41	-2.6
Havana Club	Pernod Ricard	Rum	2.00	2.32	2.61	3.00	3.40	13.3
Fernet Branca	Fratelli Branca Distillerie	Bitters	2.34	2.55	2.90	3.12	3.28	5.1
Skyy	Gruppo Campari	Vodka	2.10	2.30	2.70	2.90	3.15	8.6
Sauza	Beam Global Spirits & Wine	Tequila	3.00	2.88	3.12	3.21	3.13	-2.6
Finlandia	Brown-Forman	Vodka	1.84	2.10	2.30	2.75	3.05	10.8
Campari	Gruppo Campari	Bitters	2.90	2.90	2.90	2.93	2.93	0.0

biggest international brand, Absolut.

For the regionals, the rankings are dominated by the Pirassununga 51 cachaça brand, which accounts for 40% of the total volumes sold by brands in this category. Diageo again has the highest number of brands in this category with six, all of them focused on North or central America. Pernod Ricard follows closely with five, thanks to

the addition of Luksusowa vodka from its V&S acquisition. With the exception of Seagram's Gin these brands are all European-focused. Of the regional-focused companies, the only one with more than one entry is Poland-based CEDC, which has three vodka brands in the table.

Among the domestic/local brands, the table is topped as ever by Jinro, which also saw good

growth, perhaps benefiting from consumers trading down due to the local economic difficulties. With Thai Beverage unable to take part this year, Tanduay moved up into second place with its eponymous brand. This year sees the entry of a number of new brands, the largest of which are Iichiko shochu from Japan and the Ukrainian vodka brand Khliblyni Dar. 

Millionaires Club 2009: Top 22 Regional brands

Brand	Owner	Category	2004	2005	2006	2007	2008	% +/-
Pirassununga 51	Companhia Müller de Bebidas	Cachaça	23.59	22.34	22.61	21.50	21.98	2.2
Khortytza	Khortytza Distillery	Vodka	1.84	3.87	8.10	9.40	9.60	2.1
Seagram's	Pernod Ricard	Gin	3.31	3.30	3.44	3.44	3.38	-1.7
Parliament	CEDC	Vodka	1.12	1.48	2.03	2.70	3.08	14.1
Seagram's 7 Crown	Diageo	Whiskey – American-Other	2.50	2.50	2.50	2.50	2.50	0.0
Suntory Kakubin	Suntory	Whisky – Japanese	1.83	1.72	1.60	1.59	1.61	1.3
Popov	Diageo	Vodka	1.90	1.80	1.80	1.80	1.90	5.6
Bols	CEDC	Vodka	2.08	1.58	1.40	1.67	1.85	10.8
Clan Campbell	Pernod Ricard	Whisky – Scotch	1.59	1.58	1.56	1.64	1.72	4.9
Cacique	Diageo	Rum	1.70	1.80	1.80	1.70	1.70	0.0
Buchanan's	Diageo	Whisky – Scotch	0.90	1.00	1.30	1.60	1.50	-6.3
Soplica	CEDC	Vodka	0.81	0.73	1.06	1.29	1.47	14.0
Pastis 51	Pernod Ricard	Anis	1.76	1.66	1.53	1.49	1.41	-5.4
Clan MacGregor	William Grant & Sons	Whisky – Scotch	1.60	1.50	1.30	1.35	1.37	1.5
Seagram's VO	Diageo	Whisky – Canadian	1.40	1.40	1.30	1.30	1.30	0.0
Gordon's Vodka	Diageo	Vodka	1.50	1.50	1.40	1.30	1.30	0.0
Aperol	Gruppo Campari	Bitters	0.70	0.85	1.00	1.15	1.30	13.0
Black Nikka	Asahi Breweries	Whisky – Japanese	1.40	1.50	1.47	1.11	1.23	10.8
Amaro Ramazzotti	Pernod Ricard	Bitters	1.25	1.26	1.27	1.18	1.22	3.4
Castillo	Bacardi	Rum	1.60	1.50	1.40	1.30	1.20	-7.7
Koskenkorva	Altia Corporation	Vodka	1.38	1.25	1.21	1.22	1.09	-10.3
El Jimador	Brown-Forman	Tequila	n/a	n/a	n/a	0.92	1.02	10.8

Millionaires Club 2009: Top 30 Domestic/Local brands

Brand	Owner	Category	2004	2005	2006	2007	2008	% +/-
Jinro	Jinro Limited	Soju	70.20	71.36	72.05	69.84	75.99	8.8
Tanduay	Tanduay Distillers	Rum	14.65	13.27	12.40	14.43	16.29	12.9
Bagpiper	United Spirits	Whisky – Indian	7.34	10.54	13.02	13.95	15.41	10.5
McDowell's No.1	United Spirits	Whisky – Indian	5.68	6.07	8.65	11.46	13.39	16.8
Zelenaya Marka (Green Mark)	Russian Alcohol Group	Vodka	1.30	5.00	7.30	8.10	11.97	47.8
C1	Daesun Distilling Co	Soju	10.30	10.50	10.30	10.40	10.50	1.0
McDowell's No.1 Celebration	United Spirits	Rum	4.86	5.42	6.17	7.63	9.67	26.7
Officer's Choice	ABD	Whisky – Indian	3.30	3.94	5.01	6.60	9.50	43.9
Iichiko	Sanwa Shurui	Shochu	10.24	9.79	9.86	9.88	9.14	-7.4
Original Choice	John Distilleries	Whisky – Indian	2.28	3.16	4.12	6.41	8.84	37.9
McDowell's No.1	United Spirits	Brandy – Indian	4.58	5.29	5.99	7.64	7.53	-1.4
Ypioca	Grupo Ypioca	Cachaça	6.70	6.90	7.10	7.13	7.05	-1.1
Royal Stag	Pernod Ricard	Whisky – Indian	2.94	3.43	4.24	5.63	6.76	20.1
Khliblyni Dar	Bayadera Group	Vodka	0.08	1.06	1.55	3.57	6.63	85.7
Pyat Ozer	Alcohol Siberian Group	Vodka	0.41	1.08	2.38	6.04	6.54	8.3
Old Tavern	United Spirits	Whisky – Indian	1.29	1.87	2.55	2.84	4.77	68.0
Daigoro	Asahi Breweries	Shochu	5.14	5.19	5.24	4.66	4.44	-4.7
Absolwent	CEDC	Vodka	3.80	3.94	4.04	4.12	4.18	1.6
Director's Special	United Spirits	Whisky – Indian	3.89	4.32	3.77	3.69	4.00	8.4
Imperial Blue	Pernod Ricard	Whisky – Indian	1.72	2.00	2.51	3.13	3.83	22.4
Dreher	Gruppo Campari	Brandy – Brazilian	2.90	3.10	3.50	3.75	3.60	-4.0
Kanoka	Asahi Breweries	Shochu	1.90	2.50	3.02	3.44	3.56	3.5
Starogardzka	Belvédère	Vodka	3.73	3.19	2.60	2.84	3.01	6.0
Dai Jyuhyo	Suntory	Shochu	0.00	3.83	3.83	3.40	2.92	-14.1
Honey Bee	United Spirits	Brandy – Indian	1.26	1.30	1.73	2.20	2.82	28.2
Hayward's	United Spirits	Whisky – Indian	2.26	2.96	2.17	2.31	2.77	19.9
Montilla	Pernod Ricard	Rum	2.29	2.32	2.72	2.67	2.73	2.2
Zhuravli	Russian Alcohol Group	Vodka	n/a	n/a	n/a	n/a	2.55	n/a
Big Man	Oenon Holdings	Shochu	n/a	n/a	n/a	n/a	2.53	n/a
Belenkaya	SY Group	Vodka	n/a	2.96	1.89	2.04	2.25	10.1

Volume: Millions of 9-litre cases

India heads up



The impact of the recession can clearly be seen in the growth rates of many international brands in 2008. Of the 56 brands, only 29 saw growth compared with 44 last year. In addition, the rates of growth have fallen back, with only seven brands seeing growth rates of 10% or more in 2008, compared to 15 in 2007.

Wyborowa led the way again in 2008 with growth of 30%, primarily due to the continued strong performance in its core market, Poland. This is also the main reason for the growth of fifth placed Finlandia. Second placed William Lawson benefited from strong growth in its main market and Scotch stronghold, France. Third-placed Havana Club benefited from strong growth in western Europe, apart from its core countries Spain and Italy.

In the regional table, Poland-based brands dominated the top positions, led by Pernod Ricard's recently acquired Luksusowa. But also in the top 10 were CEDC's Bols and Sopllica brands,

both of which saw double-digit growth, while the company's Russian-focused brand Parliament also performed well. Campari's Aperol in third place performed strongly thanks to the continued rollout of the brand in Campari's core western European export markets, Germany, Austria and Switzerland.

In the domestic/local category, two new brands led the rankings, the Ukrainian Khliblyni Dar vodka (pictured, p24) and Indian Silver Cup brandy, both with growth of more than 80%. It is worth noting that two-thirds of the Top 30 fastest growing domestic/local brands in 2008 are sold in India underlining the dynamic growth in that country's spirits market. In addition, the figures for the domestic/local brands do not seem to have been adversely affected by the economic downturn in the latter part of 2008, with all top 32 brands seeing double-digit growth. This is probably due to the category being dominated by economy level brands and thus more affordable to most consumers. D

Millionaires Club 2009: Fastest growing international brands

Brand	Owner	Category	2004	2005	2006	2007	2008	% +/-
Wyborowa	Pernod Ricard	Vodka	1.00	0.93	1.17	1.78	2.32	30.3
William Lawson's	Bacardi	Whisky – Scotch	1.10	1.20	1.30	1.30	1.50	15.4
Havana Club	Pernod Ricard	Rum	2.00	2.32	2.61	3.00	3.40	13.3
Finlandia	Brown-Forman	Vodka	1.84	2.10	2.30	2.75	3.05	10.8
Russian Standard	Roust	Vodka	0.99	1.03	1.35	1.90	2.10	10.5
Jameson	Pernod Ricard	Whiskey – Irish	1.73	1.95	2.18	2.48	2.73	10.1
Sobieski	Belvédère	Vodka	1.38	1.67	2.15	2.50	2.75	10.0
Sky	Gruppo Campari	Vodka	2.10	2.30	2.70	2.90	3.15	8.6
Captain Morgan	Diageo	Rum	6.30	6.90	7.30	7.80	8.30	6.4
Smirnoff	Diageo	Vodka	20.10	21.30	23.00	24.30	25.70	5.8
Ballantine's	Pernod Ricard	Whisky – Scotch	5.68	5.63	5.62	6.17	6.50	5.3
Eristoff	Bacardi	Vodka	1.20	1.40	1.50	1.70	1.79	5.3
Fernet Branca	Fratelli Branca Distillerie	Bitters	2.34	2.55	2.90	3.12	3.28	5.1
Chivas Regal	Pernod Ricard	Whisky – Scotch	3.29	3.81	3.95	4.37	4.58	4.8
Metaxa	Rémy Cointreau	Brandy – Greek	n/a	n/a	1.10	1.10	1.15	4.5
William Grant's	William Grant & Sons	Whisky – Scotch	4.12	4.10	4.39	4.79	4.97	3.7
Label 5	La Martiniquaise	Whisky – Scotch	1.56	1.62	1.74	1.91	1.98	3.7
Velho Barreiro	Tatuzinho	Cachaça	6.50	6.90	7.08	7.15	7.40	3.5
Johnnie Walker	Diageo	Whisky – Scotch	12.00	12.80	14.30	15.80	16.30	3.2
Black Velvet	Constellation Brands	Whisky – Canadian	2.10	2.07	2.10	1.90	1.96	3.2
Pitú	Engarramento Pitú	Cachaça	7.62	7.78	8.53	9.31	9.51	2.1
Courvoisier	Beam Global Spirits & Wine	Cognac	1.20	1.12	1.14	1.17	1.19	2.1
Jack Daniel's	Brown-Forman	Whiskey – American-Tennessee	7.64	8.38	8.94	9.33	9.52	2.0
Crown Royal	Diageo	Whisky Canadian	4.20	4.50	4.70	5.00	5.10	2.0
Malibu	Pernod Ricard	Liqueurs	2.96	3.23	3.33	3.63	3.70	1.9
Bols range	Lucas Bols	Liqueurs	1.21	1.21	1.21	1.26	1.28	1.6
Jägermeister	Mast-Jägermeister	Bitters	4.50	5.20	5.95	6.32	6.41	1.4
Appleton Jamaica Rum	CL World Brands	Rum	1.08	1.11	1.13	1.14	1.15	0.5
Bombay	Bacardi	Gin	1.80	1.80	2.10	2.00	2.01	0.5

domestic/local growth

Millionaires Club 2009: Fastest growing regional brands

Brand	Owner	Category	2004	2005	2006	2007	2008	% +/-
Parliament	CEDC	Vodka	1.12	1.48	2.03	2.70	3.08	14.1
Soplica	CEDC	Vodka	0.81	0.73	1.06	1.29	1.47	14.0
Aperol	Gruppo Campari	Bitters	0.70	0.85	1.00	1.15	1.30	13.0
Black Nikka	Asahi Breweries	Whisky - Japanese	1.40	1.50	1.47	1.11	1.23	10.8
El Jimador	Brown-Forman	Tequila	n/a	n/a	n/a	0.92	1.02	10.8
Bols	CEDC	Vodka	2.08	1.58	1.40	1.67	1.85	10.8
Popov	Diageo	Vodka	1.90	1.80	1.80	1.80	1.90	5.6
Clan Campbell	Pernod Ricard	Whisky - Scotch	1.59	1.58	1.56	1.64	1.72	4.9
Amaro Ramazzotti	Pernod Ricard	Bitters	1.25	1.26	1.27	1.18	1.22	3.4
Pirassununga 51	Companhia Müller de Bebidas	Cachaça	23.59	22.34	22.61	21.50	21.98	2.2
Khortytza	Khortytza Distillery	Vodka	1.84	3.87	8.10	9.40	9.60	2.1
Clan MacGregor	William Grant & Sons	Whisky - Scotch	1.60	1.50	1.30	1.35	1.37	1.5
Suntory Kakubin	Suntory	Whisky - Japanese	1.83	1.72	1.60	1.59	1.61	1.3

Millionaires Club 2009: Fastest growing domestic/local brands

Brand	Owner	Category	2004	2005	2006	2007	2008	% +/-
Khibnyi Dar	Bayadera Group	Vodka	0.08	1.06	1.55	3.57	6.63	85.7
Silver Cup Brandy	Amrut Distilleries	Brandy - Indian	0.25	0.32	0.40	0.79	1.42	80.8
Old Tavern	United Spirits	Whisky - Indian	1.29	1.87	2.55	2.84	4.77	68.0
Zelenaya Marka (Green Mark)	Russian Alcohol Group	Vodka	1.30	5.00	7.30	8.10	11.97	47.8
Officer's Choice	ABD	Whisky - Indian	3.30	3.94	5.01	6.60	9.50	43.9
Svedka	Constellation Brands	Vodka	0.45	0.64	1.02	1.51	2.10	39.1
Original Choice	John Distilleries	Whisky - Indian	2.28	3.16	4.12	6.41	8.84	37.9
Mansion House Brandy	Tilaknagar Industries	Brandy - Indian	n/a	n/a	1.00	1.32	1.77	34.6
Old Cask	United Spirits	Rum	1.74	1.78	1.45	1.28	1.72	34.4
Director's Special Black	United Spirits	Whisky - Indian	n/a	n/a	0.90	1.34	1.77	32.1
Gosudarev Zakaz	SY Group	Vodka	n/a	0.10	0.65	1.23	1.59	29.5
Honey Bee	United Spirits	Brandy - Indian	1.26	1.30	1.73	2.20	2.82	28.2
Blenders Pride	Pernod Ricard	Whisky - Indian	n/a	0.92	1.17	1.51	1.92	27.2
McDowell's No 1 Celebration	United Spirits	Rum	4.86	5.42	6.17	7.63	9.67	26.7
Zoladkowa Gorzka	Stock Spirits Group	Vodka	n/a	0.94	1.19	1.36	1.71	25.8
White Mischief	United Spirits	Vodka	n/a	n/a	1.12	1.26	1.57	24.6
Imperial Blue	Pernod Ricard	Whisky - Indian	1.72	2.00	2.51	3.13	3.83	22.4
Royal Stag	Pernod Ricard	Whisky - Indian	2.94	3.43	4.24	5.63	6.76	20.1
Burnett's Vodka	Heaven Hill	Vodka	0.51	0.55	0.63	1.00	1.20	20
Luksusowa	Pernod Ricard	Vodka	1.20	1.15	1.15	1.47	1.76	20.0
Hayward's	United Spirits	Whisky - Indian	2.26	2.96	2.17	2.31	2.77	19.9
Romanov	United Spirits	Vodka	0.44	0.52	0.81	0.98	1.17	19.4
William Peel	Belvédère	Whisky - Scotch	1.53	1.60	1.76	1.78	2.12	19.1
John Exshaw	United Spirits	Brandy - Indian	0.98	1.18	1.12	1.49	1.77	18.8
McDowell's No 1	United Spirits	Whisky - Indian	5.68	6.07	8.65	11.46	13.39	16.8
Old Port Rum	Amrut Distilleries	Rum	0.78	0.96	1.38	1.64	1.91	16.5
Kinmen Kaoliang	Kinmen Kaoliang Liquor	Baijiu	1.61	1.49	1.81	1.88	2.15	14.4
Tanduay	Tanduay Distillers	Rum	14.65	13.27	12.40	14.43	16.29	12.9
Gold Riband	United Spirits	Whisky - Indian	0.96	1.73	1.72	1.63	1.84	12.9
Bagpiper	United Spirits	Whisky - Indian	7.34	10.54	13.02	13.95	15.41	10.5
Royal Challenge	United Spirits	Whisky - Indian	0.94	0.98	1.03	1.17	1.29	10.3
Belenkaya	SY Group	Vodka	n/a	2.96	1.89	2.04	2.25	10.1

Volume: Millions of 9-litre cases

Mixed bag at the top

The multinationals

The performance of the big two players, Diageo and Pernod Ricard, was less strong in 2008 – an indication that the global economic conditions were already having an effect by the end of the calendar year.

With Vat 69 Scotch label dropping out of the chart, Diageo has seen its number of brands fall to 15, which in turn has meant its overall volumes have only grown by 1% in 2008 to 87.6 million cases.

Pernod Ricard has seen a strong improvement, with the acquisition of V&S from the Swedish government increasing its number of brands in the list by two to 22 and overall volumes up 28% to 72 million cases. Even if one excludes its new vodkas, Absolut and Luksusowa, volumes still grew by a healthy 6%, primarily due to its Indian whiskey brands.

Both Bacardi and Beam Global saw declines in their volumes. Beam Global was particularly hit by the poor performance of its two Spanish-focused brands Larios Gin and DYC whiskey, both of which are perceived as being old-fashioned. Bacardi's decline was less serious, with its eponymous rum brand slipping a little for the third year in succession, and its expensively acquired US-focused premium vodka brand Grey Goose remaining worryingly static. If it were not for the strong growth of two of its smaller brands, Eristoff and William Lawson, the decline would have been far worse.

For other multinationals it was a mixed bag, with Brown-Forman seeing strong growth from its Finlandia and El Jimador brands, but falls in Southern Comfort and Canadian Mist.

While Campari saw good growth of its Skyy and Aperol brands, its Dreher and Campari performed less well.



The local players

Still leading the charge of local players is United Spirits, which its Millionaire brands grow by one to 17 and its volumes increase by 17% in 2008. All but two of its brands saw volume growth in 2008 as the company continued to exploit its national distribution work. Driving the company's growth has been its Indian whiskey and rum brands, with many in healthy double-digit growth, reflecting the ongoing boom in India's drinks market.

Other large local players have also performed well with CEDC and Belvédère still strong. Both companies have benefited from the dynamic growth of the Polish vodka market, although with

William Peel Belvédère also benefited from the booming Scotch market in France, as well as the international expansion of its Sobieski brand – not bad for a company in bankruptcy protection. CEDC also enjoyed the continued strong performance of its Parliament brand in Russia.

Svedka took another leap forward in its first full year backed by the might of Constellation in the US, the Swedish vodka brand's prime market. In January this year Constellation announced the divestment of more than 40 spirits brands, including two of its Millionaire vodka brands Barton and Skol, in a \$334m deal with the Sazerac Company in New Orleans. D

Millionaires Club 2009: Bacardi

Brand	Category	2004	2005	2006	2007	2008	% +/-	Status
Bacardi	Rum	19.50	20.10	20.00	19.90	19.64	-1.3	International
Grey Goose	Vodka	1.80	2.30	3.00	3.60	3.60	0.0	International
Dewar's	Whisky – Scotch	3.50	3.50	3.40	3.50	3.41	-2.6	International
Bombay	Gin	1.80	1.80	2.10	2.00	2.01	0.5	International
Eristoff	Vodka	1.20	1.40	1.50	1.70	1.79	5.3	International
William Lawson's	Whisky – Scotch	1.10	1.20	1.30	1.30	1.50	15.4	International
Castillo	Rum	1.60	1.50	1.40	1.30	1.20	-7.7	Regional

Millionaires Club 2009: Beam Global Spirits & Wine

Brand	Category	2004	2005	2006	2007	2008	% +/-	Status
Jim Beam	Whiskey - American-Bourbon			5.12	5.24	5.16	-1.5	International
Sauza	Tequila	3.00	2.88	3.12	3.21	3.13	-2.6	International
Teacher's Highland Cream	Whisky - Scotch	1.75	1.75	1.84	1.98	1.96	-0.7	International
Canadian Club	Whisky - Canadian			2.07	2.04	1.96	-4.0	International
DYC	Whisky - Spanish	1.70	1.34	1.42	1.43	1.22	-14.9	Domestic/Local
Courvoisier	Cognac	1.20	1.12	1.14	1.17	1.19	2.1	International
Larios	Gin	1.67	1.45	1.45	1.319	1.04	-21.2	Domestic/Local

Millionaires Club 2009: Gruppo Campari

Brand	Category	2004	2005	2006	2007	2008	% +/-	Status
Dreher	Brandy - Brazilian	2.90	3.10	3.50	3.75	3.60	-4.0	Domestic/Local
Skyy	Vodka	2.10	2.30	2.70	2.90	3.15	8.6	International
Campari	Bitters	2.90	2.90	2.90	2.93	2.93	0.0	International
Aperol	Bitters	0.70	0.85	1.00	1.15	1.30	13.0	Regional

Millionaires Club 2009: Diageo

Brand	Category	2004	2005	2006	2007	2008	% +/-	Status
Smirnoff	Vodka	20.10	21.30	23.00	24.30	25.70	5.8	International
Johnnie Walker	Whisky - Scotch	12.00	12.80	14.30	15.80	16.30	3.2	International
Captain Morgan	Rum	6.30	6.90	7.30	7.80	8.30	6.4	International
Baileys	Liqueurs	6.80	6.70	7.10	7.70	7.60	-1.3	International
J&B Rare	Whisky - Scotch	6.00	5.90	5.90	5.90	5.90	0.0	International
Crown Royal	Whisky - Canadian	4.20	4.50	4.70	5.00	5.10	2.0	International
Gordon's	Gin	5.30	5.00	5.00	4.50	4.30	-4.4	International
Seagram's 7 Crown	Whiskey - American-Other	2.50	2.50	2.50	2.50	2.50	0.0	Regional
Bell's	Whisky - Scotch	2.00	2.20	2.00	2.30	2.20	-4.3	International
Tanqueray	Gin	2.00	1.90	2.00	2.20	2.10	-4.5	International
Popov	Vodka	1.90	1.80	1.80	1.80	1.90	5.6	Regional
Cacique	Rum	1.70	1.80	1.80	1.70	1.70	0.0	Regional
Buchanan's	Whisky - Scotch	0.90	1.00	1.30	1.60	1.50	-6.3	Regional
Seagram's VO	Whisky - Canadian	1.40	1.40	1.30	1.30	1.30	0.0	Regional
Gordon's Vodka	Vodka	1.50	1.50	1.40	1.30	1.30	0.0	Regional

Millionaires Club 2009: Pernod Ricard

Brand	Category	2004	2005	2006	2007	2008	% +/-	Status
Absolut	Vodka	8.50	9.20	9.80	10.73	10.73	0.0	International
Royal Stag	Whisky - Indian	2.94	3.43	4.24	5.63	6.76	20.1	Domestic/Local
Ballantine's	Whisky - Scotch	5.68	5.63	5.62	6.17	6.50	5.3	International
Ricard	Anis	6.03	5.72	5.66	5.78	5.52	-4.5	International
Chivas Regal	Whisky - Scotch	3.29	3.81	3.95	4.37	4.58	4.8	International
Imperial Blue	Whisky - Indian	1.72	2.00	2.51	3.13	3.83	22.4	Domestic/Local
Malibu	Liqueurs	2.96	3.23	3.33	3.63	3.70	1.9	International
Havana Club	Rum	2.00	2.32	2.61	3.00	3.40	13.3	International
Seagram's	Gin	3.31	3.30	3.44	3.44	3.38	-1.7	Regional
Montilla	Rum	2.29	2.32	2.72	2.67	2.73	2.2	Domestic/Local
Jameson	Whiskey - Irish	1.73	1.95	2.18	2.48	2.73	10.1	International
Beefeater	Gin	2.37	2.31	2.32	2.42	2.41	-0.4	International
Wyborowa	Vodka	1.00	0.93	1.17	1.78	2.32	30.3	International
100 Pipers	Whisky - Scotch	3.16	3.34	2.94	2.50	2.25	-10.0	International
Kahlúa	Liqueurs	2.20	2.13	2.17	2.14	2.00	-6.5	International
Blenders Pride	Whisky - Indian	0.00	0.92	1.17	1.51	1.92	27.2	Domestic/Local
Luksusowa	Vodka	1.20	1.15	1.15	1.47	1.76	20.0	Domestic/Local
Clan Campbell	Whisky - Scotch	1.59	1.58	1.56	1.64	1.72	4.9	Regional
Martell	Cognac	1.16	1.26	1.46	1.61	1.54	-4.3	International
Pastis 51	Anis	1.76	1.66	1.53	1.49	1.41	-5.4	Regional
Amaro Ramazzotti	Bitters	1.25	1.26	1.27	1.18	1.22	3.4	Regional
Presidente	Brandy - Mexican	2.03	0.84	1.16	1.11	1.03	-7.2	Domestic/Local

Volume: Millions of 9-litre cases

Major Players

Millionaires Club 2009: Brown-Forman

Brand	Category	2004	2005	2006	2007	2008	% +/-	Status
Jack Daniel's	Whisky – American-Tennessee	7.64	8.38	8.94	9.33	9.52	2.0	International
Finlandia	Vodka	1.84	2.10	2.30	2.75	3.05	10.8	International
Southern Comfort	Liqueurs	2.26	2.34	2.45	2.48	2.38	-4.1	International
Canadian Mist	Whisky – Canadian	2.14	2.07	1.98	1.91	1.87	-2.4	Domestic/Local
El Jimador	Tequila				0.92	1.02	10.8	Domestic/Local

Millionaires Club 2009: Rémy Cointreau

Brand	Category	2004	2005	2006	2007	2008	% +/-	Status
Rémy Martin	Cognac	1.70	1.70	1.70	1.80	1.70	-5.6	International
Metaxa	Brandy – Greek	0.00	0.00	1.10	1.10	1.15	4.5	International
Cointreau	Liqueurs	1.20	1.30	1.30	1.30	1.10	-15.4	International

Millionaires Club 2009: United Spirits

Brand	Category	2004	2005	2006	2007	2008	% +/-	Status
Bagpiper	Whisky – Indian	7.34	10.54	13.02	13.95	15.41	10.5	Domestic/Local
McDowell's No1	Whisky – Indian	5.68	6.07	8.65	11.46	13.39	16.8	Domestic/Local
McDowell's No1 Celebration	Rum	4.86	5.42	6.17	7.63	9.67	26.7	Domestic/Local
McDowell's No1	Brandy – Indian	4.58	5.29	5.99	7.64	7.53	-1.4	Domestic/Local
Old Tavern	Whisky – Indian	1.29	1.87	2.55	2.84	4.77	68.0	Domestic/Local
Director's Special	Whisky – Indian	3.89	4.32	3.77	3.69	4.00	8.4	Domestic/Local
Honey Bee	Brandy – Indian	1.26	1.30	1.73	2.20	2.82	28.2	Domestic/Local
Hayward's	Whisky – Indian	2.26	2.96	2.17	2.31	2.77	19.9	Domestic/Local
Gold Riband	Whisky – Indian	0.96	1.73	1.72	1.63	1.84	12.9	Domestic/Local
John Exshaw	Brandy – Indian	0.98	1.18	1.12	1.49	1.77	18.8	Domestic/Local
Director's Special Black	Whisky – Indian	n/a	n/a	0.9	1.34	1.77	32.1	Domestic/Local
Old Cask	Rum	1.74	1.78	1.45	1.28	1.72	34.4	Domestic/Local
McDowell's Green Label	Whisky – Indian	2.40	2.27	1.85	1.83	1.70	-7.1	Domestic/Local
White Mischief	Vodka	n/a	n/a	1.12	1.26	1.57	24.6	Domestic/Local
Royal Challenge	Whisky – Indian	0.94	0.98	1.03	1.17	1.29	10.3	Domestic/Local
Old Adventurer	Rum	1.14	1.03	1.22	1.12	1.20	7.1	Domestic/Local
Romanov	Vodka	0.44	0.52	0.81	0.98	1.17	19.4	Domestic/Local

Millionaires Club 2009: Belvédère

Brand	Category	2004	2005	2006	2007	2008	% +/-	Status
Starogardzka	Vodka	3.73	3.19	2.60	2.84	3.01	6.0	Domestic/Local
Sobieski	Vodka	1.38	1.67	2.15	2.50	2.75	10.0	International
William Peel	Whisky – Scotch	1.53	1.60	1.76	1.78	2.12	19.1	Domestic/Local
Polonaise	Vodka	n/a	n/a	0.75	1.06	1.02	-3.8	Domestic/Local

Millionaires Club 2009: CEDC

Brand	Category	2004	2005	2006	2007	2008	% +/-	Status
Absolwent	Vodka	3.80	3.94	4.04	4.12	4.18	1.6	Domestic/Local
Parliament	Vodka	1.12	1.48	2.03	2.70	3.08	14.1	Regional
Bols	Vodka	2.08	1.58	1.40	1.67	1.85	10.8	Regional
Soplica	Vodka	0.81	0.73	1.06	1.29	1.47	14.0	Regional
Zubrowka	Vodka	n/a	n/a	n/a	1.00	1.00	0.0	Domestic/Local

Millionaires Club 2009: Constellation Brands

Brand	Category	2004	2005	2006	2007	2008	% +/-	Status
Svedka	Vodka	0.45	0.64	1.02	1.51	2.10	39.1	Domestic/Local
Black Velvet	Whisky – Canadian	2.10	2.07	2.10	1.90	1.96	3.2	International
Barton	Vodka	1.61	1.55	1.58	1.65	1.69	2.4	Domestic/Local
Skol	Vodka	1.37	1.39	1.47	1.59	1.59	0.0	Domestic/Local
Paul Masson Grand Ambre	Brandy – American	1.28	1.33	1.32	1.29	1.35	4.7	Domestic/Local

Volume: Millions of 9-litre cases

United Spirits tops list

Leading brands

Indian whiskies continued to dominate whiskies of the world rankings, accounting for 14 out of the 26 brands and five out of the leading six. This is hardly surprising when you consider that the Indian whisky market had a size in excess of 100 million 9-litre cases in 2008 – around twice that of all the other types of whisk(e)y combined, excluding Scotch.

United Spirits' brands Bagpiper and McDowell's led the way, each of them seeing double-digit growth in 2008, building on United Spirits' unique pan-Indian production and distribution network. This network, along with a market growing at double digits, meant that all but one of its brands saw growth in 2008.

The only non-Indian whiskey brand in the top five was Brown-Forman's Jack Daniel's Tennessee whiskey. Yet, after a number of years of strong growth, the brand's advance appears to have slowed down. Despite a declining domestic market (the brand's largest) it still managed to grow volumes there thanks to increased emphasis

on the off-trade. The brand also continued to see growth in eastern Europe, Australia and South Africa, although this was nearly offset by the declines in many western European countries as consumers moved away from on-trade, the brand's main distribution channel. Yet, compared with the other two US whiskey Millionaires, Jack Daniel's performed well with Beam Global's Jim Beam brand suffering a decline and Diageo's Seagram's 7 Crown remaining static.

In Canadian whisky, as befits a mature category, growth among the brands was minimal, with only Diageo's leading brand, Crown Royal, seeing any substantial growth, probably due to Diageo putting extra support behind it to capitalise on consumers trading down.


Remaining the sole representative from Ireland in the list, Pernod Ricard's Jameson saw strong growth again thanks to continued progress in the category's leading market, the US, but as for Jack Daniel's, Jameson gained ground in eastern Europe and South Africa. This countered declines in the brand's other large

markets, the UK and Ireland.

The steepest declining brand was Beam Global's DYC Spanish whisky, which saw volumes fall almost 15% in 2008, due to a combination of the brand's old-fashioned image and hence limited appeal, along with the deep Spanish recession.

Fastest growing

Indian whiskies dominated the top 10 positions of the fastest growing brands, in a category that saw double-digit growth in 2008 from an already high base. The dominance of United Spirits, with its national distribution, is evident in this table, although the upper echelons of the rankings have a great presence of smaller companies, whose brands have equally benefited from the booming sector, albeit from a much lower base.

The one surprise brand in the most dynamic of all this year's lists is the entry of the Japanese whisky brand Black Nikka, which saw double-digit growth in a generally moribund category. Yet that is likely a result of the brand recovering some volumes following a steep decline in 2007. 

Millionaires Club 2009: Whiskies of the world

Brand	Owner	Category	2004	2005	2006	2007	2008	% +/-	Status
Bagpiper	United Spirits	Whisky – Indian	7.34	10.54	13.02	13.95	15.41	10.5	Domestic/Local
McDowell's No.1	United Spirits	Whisky – Indian	5.68	6.07	8.65	11.46	13.39	16.8	Domestic/Local
Jack Daniel's	Brown-Forman	Whiskey – American-Tennessee	7.64	8.38	8.94	9.33	9.52	2.0	International
Officer's Choice	ABD	Whisky – Indian	3.30	3.94	5.01	6.60	9.50	43.9	Domestic/Local
Original Choice	John Distilleries	Whisky – Indian	2.28	3.16	4.12	6.41	8.84	37.9	Domestic/Local
Royal Stag	Pernod Ricard	Whisky – Indian	2.94	3.43	4.24	5.63	6.76	20.1	Domestic/Local
Jim Beam	Beam Global Spirits & Wine	Whiskey - American-Bourbon	n/a	n/a	5.12	5.24	5.16	-1.5	International
Crown Royal	Diageo	Whisky – Canadian	4.20	4.50	4.70	5.00	5.10	2.0	International
Old Tavern	United Spirits	Whisky – Indian	1.29	1.87	2.55	2.84	4.77	68.0	Domestic/Local
Director's Special	United Spirits	Whisky – Indian	3.89	4.32	3.77	3.69	4.00	8.4	Domestic/Local
Imperial Blue	Pernod Ricard	Whisky – Indian	1.72	2.00	2.51	3.13	3.83	22.4	Domestic/Local
Hayward's	United Spirits	Whisky – Indian	2.26	2.96	2.17	2.31	2.77	19.9	Domestic/Local
Jameson	Pernod Ricard	Whiskey – Irish	1.73	1.95	2.18	2.48	2.73	10.1	International
Seagram's 7 Crown	Diageo	Whisky – American-Other	2.50	2.50	2.50	2.50	2.50	0.0	Regional
Canadian Club	Beam Global Spirits & Wine	Whisky – Canadian	n/a	n/a	2.07	2.04	1.96	-4.0	International
Black Velvet	Constellation Brands	Whisky – Canadian	2.10	2.07	2.10	1.90	1.96	3.2	International
Blenders Pride	Pernod Ricard	Whisky – Indian	0.00	0.92	1.17	1.51	1.92	27.2	Domestic/Local
Canadian Mist	Brown-Forman	Whisky – Canadian	2.14	2.07	1.98	1.91	1.87	-2.4	Domestic/Local
Gold Riband	United Spirits	Whisky – Indian	0.96	1.73	1.72	1.63	1.84	12.9	Domestic/Local
Director's Special Black	United Spirits	Whisky – Indian	n/a	n/a	0.90	1.34	1.77	32.1	Domestic/Local
McDowell's Green Label	United Spirits	Whisky – Indian	2.40	2.27	1.85	1.83	1.70	-7.1	Domestic/Local
Suntory Kakubin	Suntory	Whisky – Japanese	1.83	1.72	1.60	1.59	1.61	1.3	Regional
Seagram's VO	Diageo	Whisky – Canadian	1.40	1.40	1.30	1.30	1.30	0.0	Regional
Royal Challenge	United Spirits	Whisky – Indian	0.94	0.98	1.03	1.17	1.29	10.3	Domestic/Local
Black Nikka	Asahi Breweries	Whisky – Japanese	1.40	1.50	1.47	1.11	1.23	10.8	Regional
DYC	Beam Global Spirits & Wine	Whisky – Spanish	1.70	1.34	1.42	1.43	1.22	-14.9	Domestic/Local



Millionaires Club 2009: Whiskies of the world – Fastest growing

Brand	Owner	Category	2004	2005	2006	2007	2008	% +/-	Status
Old Tavern	United Spirits	Whisky – Indian	1.29	1.87	2.55	2.84	4.77	68.0	Domestic/Local
Officer's Choice	ABD	Whisky – Indian	3.30	3.94	5.01	6.60	9.50	43.9	Domestic/Local
Original Choice	John Distilleries	Whisky – Indian	2.28	3.16	4.12	6.41	8.84	37.9	Domestic/Local
Director's Special Black	United Spirits	Whisky – Indian	n/a	n/a	0.90	1.34	1.77	32.1	Domestic/Local
Blenders Pride	Pernod Ricard	Whisky – Indian	n/a	0.92	1.17	1.51	1.92	27.2	Domestic/Local
Imperial Blue	Pernod Ricard	Whisky – Indian	1.72	2.00	2.51	3.13	3.83	22.4	Domestic/Local
Royal Stag	Pernod Ricard	Whisky – Indian	2.94	3.43	4.24	5.63	6.76	20.1	Domestic/Local
Hayward's	United Spirits	Whisky – Indian	2.26	2.96	2.17	2.31	2.77	19.9	Domestic/Local
McDowell's No. 1	United Spirits	Whisky – Indian	5.68	6.07	8.65	11.46	13.39	16.8	Domestic/Local
Gold Riband	United Spirits	Whisky – Indian	0.96	1.73	1.72	1.63	1.84	12.9	Domestic/Local
Black Nikka	Asahi Breweries	Whisky – Japanese	1.40	1.50	1.47	1.11	1.23	10.8	Regional
Bagpiper	United Spirits	Whisky – Indian	7.34	10.54	13.02	13.95	15.41	10.5	Domestic/Local
Royal Challenge	United Spirits	Whisky – Indian	0.94	0.98	1.03	1.17	1.29	10.3	Domestic/Local
Jameson	Pernod Ricard	Whiskey – Irish	1.73	1.95	2.18	2.48	2.73	10.1	International
Director's Special	United Spirits	Whisky – Indian	3.89	4.32	3.77	3.69	4.00	8.4	Domestic/Local
Black Velvet	Constellation Brands	Whisky – Canadian	2.10	2.07	2.10	1.90	1.96	3.2	International
Jack Daniel's	Brown-Forman	Whiskey – American-Tennessee	7.64	8.38	8.94	9.33	9.52	2.0	International
Crown Royal	Diageo	Whisky – Canadian	4.20	4.50	4.70	5.00	5.10	2.0	International
Suntory Kakubin	Suntory	Whisky – Japanese	1.83	1.72	1.60	1.59	1.61	1.3	Regional

Volume: Millions of 9-litre cases

Leaders make steady ground

Blended Scotch has seen little movement in ranking terms during 2008, although that's not to say there aren't interesting things happening in the category. The most notable is that actual volume increases for all the leading brands were smaller in 2008, suggesting that much of any brand's growth was achieved in the first part of 2008, with the global economic conditions starting to have an effect later in the year.

Brands which were over-exposed to Spain were badly hit, as the country went into recession much earlier than most countries and saw a dramatic fall in Scotch volumes. Brands such as Ballantine's, J&B and Sir Edward's suffered, although Ballantine's & J&B were able to offset those declines with growth in other regions, notably central and eastern Europe. Label 5 was further hit by steep declines in its other key region, Indochina, as these countries were hit by the economic downturn.

Central and eastern Europe seem to have been the main saviour for Scotch brands, with Johnnie Walker and Chivas Regal maintaining their popularity while volumes in their key market of China suffered.

In western Europe, the continued taste for blended Scotch in France also helped to boost brands such as Grant's, William Peel, Clan Campbell William Lawson and, to a lesser



extent, Label 5.

Of the brands that suffered declines in 2008, 100 Pipers still seems to be suffering in its major market, Thailand, while Bacardi's Dewar's brand suffered from its over-reliance on mature "western" markets, notably the US.

Bell's is also likely to have suffered due to a

decline in its major market, the UK.

There are also some familiar names absent this year, with neither of the two Edrington brands, The Famous Grouse and Cutty Sark, featured in the list, due to the company declining to participate, while Diageo's VAT 69 brand fell out of the list.

Millionaires Club 2009: Scotch whisky

Brand	Owner	2004	2005	2006	2007	2008	% +/-	Status
Johnnie Walker	Diageo	12.00	12.80	14.30	15.80	16.30	3.2	International
Ballantine's	Pernod Ricard	5.68	5.63	5.62	6.17	6.50	5.3	International
J&B Rare	Diageo	6.00	5.90	5.90	5.90	5.90	0.0	International
Grant's	William Grant & Sons	4.12	4.10	4.39	4.79	4.97	3.7	International
Chivas Regal	Pernod Ricard	3.29	3.81	3.95	4.37	4.58	4.8	International
Dewar's	Bacardi	3.50	3.50	3.40	3.50	3.41	-2.6	International
100 Pipers	Pernod Ricard	3.16	3.34	2.94	2.50	2.25	-10.0	International
Bell's	Diageo	2.00	2.20	2.00	2.30	2.20	-4.3	International
William Peel	Belvédère	1.53	1.60	1.76	1.78	2.12	19.1	Domestic/Local
Label 5	La Martiniquaise	1.56	1.62	1.74	1.91	1.98	3.7	International
Teacher's Highland Cream	Beam Global Spirits & Wine	1.75	1.75	1.84	1.98	1.96	-0.7	International
Clan Campbell	Pernod Ricard	1.59	1.58	1.56	1.64	1.72	4.9	Regional
William Lawson's	Bacardi	1.10	1.20	1.30	1.30	1.50	15.4	International
Buchanan's	Diageo	0.90	1.00	1.30	1.60	1.50	-6.3	Regional
Clan MacGregor	William Grant & Sons	1.60	1.50	1.30	1.35	1.37	1.5	Regional
Sir Edward's	Bardinet	0.98	1.04	1.26	1.27	1.05	-17.5	International

Volume: Millions of 9-litre cases

Favourites in reshuffle

Vodka remains unrivalled as the most populated category in the Millionaires list, with 42 entries this year, up from 37 in 2008. This is despite the fast churn of vodka brands in Russia, that can see a brand such as Myagkov with more than 2 million cases in 2007 not appear at all in 2008.

The category has also seen a certain amount of movement. Among the established brands the most dramatic move has been the growth of RAG's Green Mark, which has moved it from fifth place in the volume rankings to second, behind the distant leader Smirnoff. Absolut, which was second in 2008 fell a place as its sales stagnated due to its change of ownership from V&S to Pernod Ricard and the consequent effects on global distribution arrangements.

Beneath Absolut it is interesting to note that the two predominant Ukrainian vodka producers in the list, Khortytza and Nemiroff, both seem to be suffering from the troubles facing the country's domestic economy, showing growth of 2% and a decline of 4% respectively. In 2007, both brands had seen double-digit growth.

Fastest growers

An additional factor in the weak performance of the two big Ukrainian brands could also be the rapid rise of a new Ukrainian entry to the list –

Khlibnyi Dar, produced by Bayadera Group. With year-on-year growth in excess of 85%, it proved to be the most dynamic vodka brand in 2008, and its impressive 6.63m case volume catapulted it above Russia's Pyat Ozer, though it still trails its nearest rival, Nemiroff, by a couple of million cases.

At least as impressive in second place in the growth stakes was Green Mark, leaping nearly 48% to put it close to 12 million cases in volume and into the top 10 in the Millionaires list overall.

Yet it is worth noting the broad geographic spread of the most dynamic brands in the vodka category. Following the Ukrainian and Russian big hitters, the third fastest growing brand was US-focused Svedka with 39% growth.

Other US focused brands included McCormick, Skyy and Burnett's.

Perhaps the most prevalent country in the list was Poland with brands such as Wyborowa, Zoladkowa Gorzka, Luksusowa, Soplca, Bols and Sobieski all seeing considerable growth – although in the latter case it has also benefited from international expansion, including a launch in the US. In addition, much of the growth for Brown-Forman's Finlandia's has come in the Polish market. Poland's numerical dominance is closely followed by Russia, however, with



Millionaires Club 2009: Top 20 vodkas

Brand	Owner	2004	2005	2006	2007	2008	% +/-	Status
Smirnoff	Diageo	20.10	21.30	23.00	24.30	25.70	5.8	International
Zelenaya Marka (Green Mark)	Russian Alcohol Group	1.30	5.00	7.30	8.10	11.97	47.8	Domestic/Local
Absolut	Pernod Ricard	8.50	9.20	9.80	10.73	10.73	0.0	International
Khortytza	Khortytza Distillery	1.84	3.87	8.10	9.40	9.60	2.1	Regional
Nemiroff	Nemiroff Ukrainian Vodka Co	7.28	9.32	7.80	8.89	8.55	-3.8	International
Khlibnyi Dar	Bayadera Group	0.08	1.06	1.55	3.57	6.63	85.7	Domestic/Local
Pyat Ozer	Alcohol Siberian Group	0.41	1.08	2.38	6.04	6.54	8.3	Domestic/Local
Absolwent	CEDC	3.80	3.94	4.04	4.12	4.18	1.6	Domestic/Local
Grey Goose	Bacardi	1.80	2.30	3.00	3.60	3.60	0.0	International
Skyy	Gruppo Campari	2.10	2.30	2.70	2.90	3.15	8.6	International
Parliament	CEDC	1.12	1.48	2.03	2.70	3.08	14.1	Regional
Finlandia	Brown-Forman	1.84	2.10	2.30	2.75	3.05	10.8	International
Starogardzka	Belvédère	3.73	3.19	2.60	2.84	3.01	6.0	Domestic/Local
Sobieski	Belvédère	1.38	1.67	2.15	2.50	2.75	10.0	International
Zhuravli	Russian Alcohol Group	n/a	n/a	n/a	n/a	2.55	n/a	Domestic/Local
Wyborowa	Pernod Ricard	1.00	0.93	1.17	1.78	2.32	30.3	International
Belenkaya	SY Group	n/a	2.96	1.89	2.04	2.25	10.1	Domestic/Local
Yamskaya	Russian Alcohol Group	n/a	n/a	n/a	n/a	2.16	n/a	Domestic/Local
Russian Standard	Roust	0.99	1.03	1.35	1.90	2.10	10.5	International
Svedka	Constellation Brands	0.45	0.64	1.02	1.51	2.10	39.1	Domestic/Local

Volume: Millions of 9-litre cases

Vodka

brands such as Gosudarev Zakaz, Russian Standard and Pyat Ozer.

More interesting, perhaps, are the two Indian brands in the list, White Mischief and the new entrant Romanov, both from the United Spirits stable. This is testament to the rapidly growing popularity of the category in India, something that is expected to continue for the foreseeable future.

International

The underlying strength of the vodka category can be seen in the fact that only one of the top 10 International brands showed negative growth in 2008 volumes – and, in the case of Nemiroff, it was the economic problems in the domestic Ukrainian market that caused the drop.

Conversely, the reversal in fortunes of the US super-premium sector can be seen in the abrupt halt in the rise of Grey Goose and, with Absolut's temporary slow-down, one can only speculate what further progress might have been made by Smirnoff and Skyy had economic conditions in the US been more favourable.

Regional, domestic/local

Away from the International stage, it's vodka's traditional heartlands that drive the category. The top regional performers were dominated by the CEDC trio of Parliament, Bols and Soplca, covering Russia and Poland/central Europe, with Russian and Ukrainian brands putting in the big volumes in domestic/local.

Making it into the list for the first time in 2008 were four brands in the domestic/local vodka section: RAG's Zhuravli and Yamskaya, Stock Spirits' Czysza de Luxe and Synergy's Russky Lyod. ☐



Millionaires Club 2009: Fastest growing vodkas, Top 20

Brand	Owner	2004	2005	2006	2007	2008	% +/-	Status
Khibnyi Dar	Bayadera Group	0.08	1.06	1.55	3.57	6.63	85.7	Domestic/Local
Zelenaya Marka (Green Mark)	Russian Alcohol Group	1.30	5.00	7.30	8.10	11.97	47.8	Domestic/Local
Svedka	Constellation Brands	0.45	0.64	1.02	1.51	2.10	39.1	Domestic/Local
Wyborowa	Pernod Ricard	1.00	0.93	1.17	1.78	2.32	30.3	International
Gosudarev Zakaz	SY Group	0.00	0.10	0.65	1.23	1.59	29.5	Domestic/Local
Zoladkowa Gorzka	Stock Spirits Group	n/a	0.94	1.19	1.36	1.71	25.8	Domestic/Local
White Mischief	United Spirits	n/a	n/a	1.12	1.26	1.57	24.6	Domestic/Local
Burnett's Vodka	Heaven Hill	0.51	0.55	0.63	1.00	1.20	20.0	Domestic/Local
Luksusowa	Pernod Ricard	1.20	1.15	1.15	1.47	1.76	20.0	Domestic/Local
Romanov	United Spirits	0.44	0.52	0.81	0.98	1.17	19.4	Domestic/Local
Parliament	CEDC	1.12	1.48	2.03	2.70	3.08	14.1	Regional
Soplca	CEDC	0.81	0.73	1.06	1.29	1.47	14.0	Regional
Bols	CEDC	2.08	1.58	1.40	1.67	1.85	10.8	Regional
Finlandia	Brown-Forman	1.84	2.10	2.30	2.75	3.05	10.8	International
Russian Standard	Roust	0.99	1.03	1.35	1.90	2.10	10.5	International
Belenkaya	SY Group	n/a	2.96	1.89	2.04	2.25	10.1	Domestic/Local
Sobieski	Belvédère	1.38	1.67	2.15	2.50	2.75	10.0	International
Skyy	Gruppo Campari	2.10	2.30	2.70	2.90	3.15	8.6	International
Pyat Ozer	Alcohol Siberian Group	0.41	1.08	2.38	6.04	6.54	8.3	Domestic/Local
McCormick	McCormick Distilling	1.93	1.98	2.01	1.80	1.93	7.6	Domestic/Local

Volume: Millions of 9-litre cases

Vodka

Millionaires Club 2009: Top 10 International vodkas

Brand	Owner	2004	2005	2006	2007	2008	% +/-
Smirnoff	Diageo	20.10	21.30	23.00	24.30	25.70	5.8
Absolut	Pernod Ricard	8.50	9.20	9.80	10.73	10.73	0.0
Nemiroff	Nemiroff Ukrainian Vodka Co	7.28	9.32	7.80	8.89	8.55	-3.8
Grey Goose	Bacardi	1.80	2.30	3.00	3.60	3.60	0.0
Skyy	Gruppo Campari	2.10	2.30	2.70	2.90	3.15	8.6
Finlandia	Brown-Forman	1.84	2.10	2.30	2.75	3.05	10.8
Sobieski	Belvédère	1.38	1.67	2.15	2.50	2.75	10.0
Wyborowa	Pernod Ricard	1.00	0.93	1.17	1.78	2.32	30.3
Russian Standard	Roust	0.99	1.03	1.35	1.90	2.10	10.5
Eristoff	Bacardi	1.20	1.40	1.50	1.70	1.79	5.3

Millionaires Club 2009: Top 6 Regional vodkas

Brand	Owner	2004	2005	2006	2007	2008	% +/-
Khortytza	Khortytza Distillery	1.84	3.87	8.10	9.40	9.60	2.1
Parliament	CEDC	1.12	1.48	2.03	2.70	3.08	14.1
Popov	Diageo	1.90	1.80	1.80	1.80	1.90	5.6
Bols	CEDC	2.08	1.58	1.40	1.67	1.85	10.8
Soplica	CEDC	0.81	0.73	1.06	1.29	1.47	14.0
Gordon's Vodka	Diageo	1.50	1.50	1.40	1.30	1.30	0.0

Millionaires Club 2009: Top 6 Domestic/Local vodkas

Brand	Owner	2004	2005	2006	2007	2008	% +/-
Zelenaya Marka (Green Mark)	Russian Alcohol Group	1.30	5.00	7.30	8.10	11.97	47.8
Khlibnyi Dar	Bayadera Group	0.08	1.06	1.55	3.57	6.63	85.7
Pyat Ozer	Alcohol Siberian Group	0.41	1.08	2.38	6.04	6.54	8.3
Absolwent	CEDC	3.80	3.94	4.04	4.12	4.18	1.6
Starogardzka	Belvédère	3.73	3.19	2.60	2.84	3.01	6.0
Zhuravli	Russian Alcohol Group	n/a	n/a	n/a	n/a	2.55	n/a

Volume: Millions of 9-litre cases



Bacardi feels the pinch

For the fourth year in a row, the world's leading rum brand, Bacardi, saw volumes decline. While not in imminent danger of losing its leading position, the continued fall must be a worry. While there were extenuating circumstances in 2008, notably the recession in the US, the brand faces longer-term problems.

In many of its main markets it has reached maximum penetration as a mature brand, fighting to maintain shares in these markets, which are still growing. The other more fundamental issue is that global rum growth is being driven by dark and golden rum – sectors in which Bacardi is not strong. This is not only in the most dynamic region of Asia-Pacific, but more importantly in its core markets of North America and Western Europe. This has meant that dark rum-focused brands such as Diageo's Captain Morgan and Pernod Ricard's Havana Club continued to see strong growth in 2008.

There was continued strong growth of brands in Asia-Pacific



countries, led by Tanduay's eponymous brand. All growth in the region is driven by local economy dark rum products such as

McDowell's in India. With disposable incomes rising in the region these markets, especially India, offer good growth prospects and it is hardly surprising that Diageo and Pernod Ricard have already launched their dark rum brands in these markets.

Three of the four cachaça Millionaire brands grew in 2008 – which in itself is an achievement, considering the mature nature of its domestic Brazilian market and its still limited appeal outside Brazil. In 2008 it was the more premium products that drove the growth as consumers traded up. Early indications in 2009 have suggested that this trend has stopped and consumers are drinking more economy variants as Brazil feels the effects of the global recession. □



Millionaires Club 2009: Rum

Brand	Owner	2004	2005	2006	2007	2008	% +/-	Status
Bacardi	Bacardi	19.50	20.10	20.00	19.90	19.64	-1.3	International
Tanduay	Tanduay Distillers	14.65	13.27	12.40	14.43	16.29	12.9	Domestic/Local
McDowell's No 1 Celebration	United Spirits	4.86	5.42	6.17	7.63	9.67	26.7	Domestic/Local
Captain Morgan	Diageo	6.30	6.90	7.30	7.80	8.30	6.4	International
Havana Club	Pernod Ricard	2.00	2.32	2.61	3.00	3.40	13.3	International
Montilla	Pernod Ricard	2.29	2.32	2.72	2.67	2.73	2.2	Domestic/Local
Old Port Rum	Amrut Distilleries	0.78	0.96	1.38	1.64	1.91	16.5	Domestic/Local
Old Cask	United Spirits	1.74	1.78	1.45	1.28	1.72	34.4	Domestic/Local
Cacique	Diageo	1.70	1.80	1.80	1.70	1.70	0.0	Regional
Santa Teresa	Santa Teresa International	1.03	1.11	1.30	1.40	1.43	2.1	Domestic/Local
Castillo	Bacardi	1.60	1.50	1.40	1.30	1.20	-7.7	Regional
Old Adventurer	United Spirits	1.14	1.03	1.22	1.12	1.20	7.1	Domestic/Local
Appleton Jamaica Rum	CL World Brands	1.08	1.11	1.13	1.14	1.15	0.5	International

Millionaires Club 2009: Cachaça

Brand	Owner	2004	2005	2006	2007	2008	% +/-	Status
Pirassununga 51	Companhia Müller de Bebidas	23.59	22.34	22.61	21.50	21.98	2.2	Regional
Pitú	Engarrafamento Pitú	7.62	7.78	8.53	9.31	9.51	2.1	International
Velho Barreiro	Tatuzinho	6.50	6.90	7.08	7.15	7.40	3.5	International
Ypioca	Grupo Ypioca	6.70	6.90	7.10	7.13	7.05	-1.1	Domestic/Local

Volume: Millions of 9-litre cases

India up, France down

Cognac

All three of the largest Cognac brands saw volumes decline in 2008. With their dominance in the VS and VSOP markets in the US, Hennessy and Rémy Martin suffered a collapse in consumption when the economy faltered.

Martell didn't suffer quite such a steep decline, partly due to its smaller presence in the US, but it did experience unspecified problems in the middle of 2008 in the Asia-Pacific region.

Beam Global's Courvoisier was the only brand to buck the declining trend, its 20,000 case increase being something of an achievement given the US is one of its major markets. The are unclear, although it could be due to promotional activity in the US or, more likely, in the UK.

Brandy

The dynamic Indian market was the driving force behind growth in the brandy category in 2008. The smaller brands all progressed, partly at the expense of the country's (and world's) leading brand McDowell's. Climbing fastest were new entrants Silver Cup, from Amrut, and Tilaknagar Industries' flagship Mansion House, with United Spirits' established Honey Bee also performing well.

In other markets, the growth of the two US brands in the list, Paul Masson and Christian Brothers, reflects increasing consolidation in a declining category. □



Millionaires Club 2009: Cognac

Brand	Owner	2004	2005	2006	2007	2008	% +/-	Status
Hennessy	LVMH	3.73	3.80	4.30	4.73	4.48	-5.3	International
Rémy Martin	Rémy Cointreau	1.70	1.70	1.70	1.80	1.70	-5.6	International
Martell	Pernod Ricard	1.16	1.26	1.46	1.61	1.54	-4.3	International
Courvoisier	Beam Global Spirits & Wine	1.20	1.12	1.14	1.17	1.19	2.1	International

Millionaires Club 2009: Brandy

Brand	Owner	Category	2004	2005	2006	2007	2008	% +/-	Status
McDowell's No.1	United Spirits	Brandy - Indian	4.58	5.29	5.99	7.64	7.53	-1.4	Domestic/Local
Dreher	Gruppo Campari	Brandy - Brazilian	2.90	3.10	3.50	3.75	3.60	-4.0	Domestic/Local
Honey Bee	United Spirits	Brandy - Indian	1.26	1.30	1.73	2.20	2.82	28.2	Domestic/Local
Mansion House Brandy	Tilaknagar Industries	Brandy - Indian	n/a	n/a	1.00	1.32	1.77	34.6	Domestic/Local
John Exshaw	United Spirits	Brandy - Indian	0.98	1.18	1.12	1.49	1.77	18.8	Domestic/Local
Silver Cup Brandy	Amrut Distilleries	Brandy - Indian	0.25	0.32	0.40	0.79	1.42	80.8	Domestic/Local
Paul Masson Grand Ambre	Constellation Brands	Brandy - American	1.28	1.33	1.32	1.29	1.35	4.7	Domestic/Local
Christian Brothers	Heaven Hill	Brandy - American	1.15	1.14	1.14	1.15	1.17	1.7	Domestic/Local
Metaxa	Rémy Cointreau	Brandy - Greek	n/a	n/a	1.10	1.10	1.15	4.5	International
Presidente	Pernod Ricard	Brandy - Mexican	2.03	0.84	1.16	1.11	1.03	-7.2	Domestic/Local
Klipdrift	Distell Group	Brandy - South African	0.87	0.89	0.94	0.98	1.00	2.0	Domestic/Local

Volume: Millions of 9-litre cases

Niche gins on the up

The world's top gin brands had a disappointing year in 2008, with only Bombay seeing a little growth. The biggest casualty was Beam's Larios Gin, which is now in danger of dropping out of the list, having fallen by 21% due to the brand being perceived as old-fashioned and the deep recession in the country.

With the owner of the leading gin brand Ginebra San Miguel – volumes estimated at about 25 million cases – still declining to participate in

Millionaires, the leading brand in the list was Diageo's Gordon's, which slipped back for the second year in a row. Two of the brand's leading markets are the UK and Spain, which were the first to go into recession, so volumes are likely to have been hit in these markets. Diageo's other gin brand, premium Tanqueray, saw a decline as volumes fell back after the launch of its Rangpur variant at the end of 2007.

There has been much talk of a gin revival in

the on-trade, helped by bartenders seeking out ever more complex and subtle flavour combinations. Despite a growing number of boutique gin brands successfully exploiting the ongoing trend for flavoured vodka, especially in the US, the leading gin brands have still managed to lose ground – compare with good growth figures for vodka brands strong in flavours, such as Svedka, Finlandia and Skyy (see page 26).

Ryan Magarian, mixologist and co-creator of New Western Dry style gin Aviation, says that gin still suffers in the US from a historical association with the “bathtub gin” of Prohibition times, and that it represents: “A far more significant challenge to the American palate than vodka or rum, thanks to its foremost characteristic, the juniper berry.”

He argues that many of the best known brands “have done very little to bring gin into a new age of understanding and appreciation continuing to rely on the category's standard equity delivery vehicles such as the gin and tonic and the gin martini”.

Pernod Ricard's brand director for Beefeater gin, Nick Blacknell, concedes: “Sales volumes of the niche gins are certainly on the up.” But he doesn't accept that as a full explanation for the decline in the big brands. “In our case we've stood up remarkably well versus other categories and brands,” he says. “For example, in Spain other categories are having a much harder time than gin, and within gin we are gaining share despite growth slowing.”

Despite the category's problems, both Magarian and Blacknell are optimistic. “In the end, I think as the revolution in the cocktail world grows, so will the market for gin,” says Magarian. “I guess it's the old adage,” adds Blacknell, “if you invest in and support your brand it will hold its own even in difficult times.” ▢



Millionaires Club 2009: Gin

Brand	Owner	2004	2005	2006	2007	2008	% +/-	Status
Gordon's	Diageo	5.30	5.00	5.00	4.50	4.30	-4.4	International
Seagram's	Pernod Ricard	3.31	3.30	3.44	3.44	3.38	-1.7	Regional
Beefeater	Pernod Ricard	2.37	2.31	2.32	2.42	2.41	-0.4	International
Tanqueray	Diageo	2.00	1.90	2.00	2.20	2.10	-4.5	International
Bombay	Bacardi	1.80	1.80	2.10	2.00	2.01	0.5	International
Larios	Beam Global Spirits & Wine	1.67	1.45	1.45	1.32	1.04	-21.2	Domestic/Local

Volume: Millions of 9-litre cases

Liqueurs struggle as US sales stagnate

In the bitters category, Jägermeister remained clearly the leading brand, although its rate of growth slowed considerably to just over 1%. This was primarily due to the stagnation of sales in its major US market, and despite the strong growth in its more dynamic markets such as the UK and Croatia. Second-placed Fernet Branca continued to progress well thanks to a strong performance in its major market, Argentina, while Gruppo Campari seems increasingly reliant on its Aperol brand for growth in bitters, as its eponymous brand continues to struggle.

The performance of liqueurs brands in the list was generally weak, especially those which move a large proportion of volumes in the US. Being heavily dependent on the cocktail sector, liqueur brands suffered in 2008 as recession-hit consumers increasingly moved away from expensive style bars towards home consumption, especially in the US. This was certainly the case for the De Kuyper, Southern Comfort and Cointreau brands.

The largest brand in the category, Bailey's, although big in the US, fell back from the large

boost it received in 2007 from its flavoured variants launch. Malibu's slight growth came primarily in the first half of the year as its major markets, the US and UK, faced declines in the second half of the year. Pernod's other brand in the list, Kahlúa, saw a double-digit decline due to the recession in the US but also the brand's perceived old-fashioned image.

In tequila, the world's largest brand, José Cuervo, did not submit figures this year. The brand registered 6.7 million cases in 2007, but probably suffered a decline in 2008, given the ►



Other Categories

economic woes in the world's largest tequila market, the US, and a drop in volumes of 2% in the latter part of 2008 at its main global distributor Diageo.

The weakness of the US market meant there was a mixed performance for tequila brands, with Sauza declining, but both Patrón and new entry El Jimador seeing growth. The former shows that there is still room for a super-premium brand to

thrive in the recession-hit US if the proposition is right, while the latter benefited from becoming part of the Brown-Forman brand stable.

Anis products, both owned by Pernod Ricard, slipped again as the category's principal market, France, continued its long-term decline, assisted by stringent anti-alcohol policies.

Meanwhile in Asia, the Soju/Shochu category saw two new entrants, both from Japan, with

Sanwa Shurui's Ichiko and Oenon Holdings' Big Man joining the list. Most of the brands saw declines in 2008, especially in Japan, primarily due to losing share to rivals in the category. Both Japan and South Korea's markets are huge, having volumes of more than 110 million cases, but they are mature and expect to see little growth – for any brand in this sector to grow it needs to take share from others. D

Millionaires Club 2009: Liqueurs

Brand	Owner	Category	2004	2005	2006	2007	2008	% +/-	Status
Baileys	Diageo	Liqueurs	6.80	6.70	7.10	7.70	7.60	-1.3	International
De Kuiper range	Koninklijke De Kuiper/ Beam Global Spirits & Wine	Liqueurs	4.86	4.78	4.90	4.90	4.74	-3.3	International
Malibu	Pernod Ricard	Liqueurs	2.96	3.23	3.33	3.63	3.70	1.9	International
Southern Comfort	Brown-Forman	Liqueurs	2.26	2.34	2.45	2.48	2.38	-4.1	International
Kahlúa	Pernod Ricard	Liqueurs	2.20	2.13	2.17	2.14	2.00	-6.5	International
Bols range	Lucas Bols	Liqueurs	1.21	1.21	1.21	1.26	1.28	1.6	International
Cointreau	Rémy Cointreau	Liqueurs	1.20	1.30	1.30	1.30	1.10	-15.4	International
Amarula	Distell Group	Liqueurs	0.69	0.79	0.93	1.08	1.08	0.0	International

Millionaires Club 2009: Bitters

Brand	Owner	Category	2004	2005	2006	2007	2008	% +/-	Status
Jägermeister	Mast-Jägermeister	Bitters	4.50	5.20	5.95	6.32	6.41	1.4	International
Fernet Branca	Fratelli Branca Distillerie	Bitters	2.34	2.55	2.90	3.12	3.28	5.1	International
Campari	Gruppo Campari	Bitters	2.90	2.90	2.90	2.93	2.93	0.0	International
Aperol	Gruppo Campari	Bitters	0.70	0.85	1.00	1.15	1.30	13.0	Regional
Amaro Ramazzotti	Pernod Ricard	Bitters	1.25	1.26	1.27	1.18	1.22	3.4	Regional

Millionaires Club 2009: Tequila

Brand	Owner	Category	2004	2005	2006	2007	2008	% +/-	Status
Sauza	Beam Global Spirits & Wine	Tequila	3.00	2.88	3.12	3.21	3.13	-2.6	International
Patrón	Patrón Spirits	Tequila	0.36	0.65	1.15	1.60	1.73	7.8	Domestic/Local
El Jimador	Brown-Forman	Tequila	n/a	n/a	n/a	0.92	1.02	10.8	Regional

Millionaires Club 2009: Other categories

Brand	Owner	Category	2004	2005	2006	2007	2008	% +/-	Status
Anis									
Ricard	Pernod Ricard	Anis	6.03	5.72	5.66	5.78	5.52	-4.5	International
Pastis 51	Pernod Ricard	Anis	1.76	1.66	1.53	1.49	1.41	-5.4	Regional
Baijiu									
Kinmen Kaoliang	Kinmen Kaoliang Liquor	Baijiu	1.61	1.49	1.81	1.88	2.15	14.4	Domestic/Local
Conhaque									
Domus	Companhia Müller de Bebidas	Conhaque	1.73	1.53	1.46	1.30	1.35	3.8	Domestic/Local
Pisco									
Capel	Capel Cooperativa Agricola Pisquera de Elqui	Pisco	1.2	1.36	1.35	1.32	1.37	3.8	Domestic/Local
Soju/Shochu									
Jinro	Jinro Limited	Soju	70.20	71.36	72.05	69.84	75.99	8.8	Domestic/Local
C1	Daesun Distilling Co	Soju	10.3	10.5	10.3	10.4	10.5	1.0	Domestic/Local
Ichiko	Sanwa Shurui	Shochu	10.24	9.79	9.86	9.88	9.14	-7.4	Domestic/Local
Daigoro	Asahi Breweries	Shochu	5.14	5.19	5.24	4.66	4.44	-4.7	Domestic/Local
Kanoka	Asahi Breweries	Shochu	1.90	2.50	3.02	3.44	3.56	3.5	Domestic/Local
Dai Jyuhyo	Suntory	Shochu	0.00	3.83	3.83	3.40	2.92	-14.1	Domestic/Local
Big Man	Oenon Holdings	Shochu	n/a	n/a	n/a	n/a	2.53	n/a	Domestic/Local

Volume: Millions of 9-litre cases

Spirits high despite gloom



The 2008 Millionaires Club saw little movement in Top 10 brands, although Green Mark leapt over Absolut to earn a spot. Of the 16 new entrants in 2008, 15 were domestic/local brands, emphasising the continued dynamism of that sector

Millionaires Club 2009

Brand	Owner	Category	2004	2005	2006	2007	2008	% +/-	Status	
1	Jinro	Jinro Limited	Soju	70.20	71.36	72.05	69.84	75.99	8.8	Domestic/Local
2	Smirnoff	Diageo	Vodka	20.10	21.30	23.00	24.30	25.70	5.8	International
3	Pirassununga 51	Companhia Müller de Bebidas	Cachaça	23.59	22.34	22.61	21.50	21.98	2.2	Regional
4	Bacardi	Bacardi	Rum	19.50	20.10	20.00	19.90	19.64	-1.3	International
5	Johnnie Walker	Diageo	Whisky – Scotch	12.00	12.80	14.30	15.80	16.30	3.2	International
6	Tanduay	Tanduay Distillers	Rum	14.65	13.27	12.40	14.43	16.29	12.9	Domestic/Local
7	Bagpiper	United Spirits	Whisky – Indian	7.34	10.54	13.02	13.95	15.41	10.5	Domestic/Local
8	McDowell's No.1	United Spirits	Whisky – Indian	5.68	6.07	8.65	11.46	13.39	16.8	Domestic/Local
9	Zelenaya Marka (Green Mark)	Russian Alcohol Group	Vodka	1.30	5.00	7.30	8.10	11.97	47.8	Domestic/Local
10	Absolut	Pernod Ricard	Vodka	8.50	9.20	9.80	10.73	10.73	0.0	International
11	C1	Daesun Distilling Co	Soju	10.30	10.50	10.30	10.40	10.50	1.0	Domestic/Local
12	McDowell's No.1 Celebration	United Spirits	Rum	4.86	5.42	6.17	7.63	9.67	26.7	Domestic/Local
13	Khortytza	Khortytza Distillery	Vodka	1.84	3.87	8.10	9.40	9.60	2.1	Regional
14	Jack Daniel's	Brown-Forman	Whiskey – American-Tennessee	7.64	8.38	8.94	9.33	9.52	2.0	International
15	Pitú	Engarrafamento Pitú	Cachaça	7.62	7.78	8.53	9.31	9.51	2.1	International
16	Officer's Choice	ABD	Whisky – Indian	3.30	3.94	5.01	6.60	9.50	43.9	Domestic/Local
17	lichiko	Sanwa Shurui	Shochu	10.24	9.79	9.86	9.88	9.14	-7.4	Domestic/Local
18	Original Choice	John Distilleries	Whisky – Indian	2.28	3.16	4.12	6.41	8.84	37.9	Domestic/Local
19	Nemiroff	Nemiroff Ukrainian Vodka Co	Vodka	7.28	9.32	7.80	8.89	8.55	-3.8	International
20	Captain Morgan	Diageo	Rum	6.30	6.90	7.30	7.80	8.30	6.4	International
21	Baileys	Diageo	Liqueurs	6.80	6.70	7.10	7.70	7.60	-1.3	International
22	McDowell's No.1	United Spirits	Brandy – Indian	4.58	5.29	5.99	7.64	7.53	-1.4	Domestic/Local
23	Velho Barreiro	Tatuzinho	Cachaça	6.50	6.90	7.08	7.15	7.40	3.5	International
24	Ypioca	Grupo Ypioca	Cachaça	6.70	6.90	7.10	7.13	7.05	-1.1	Domestic/Local
25	Royal Stag	Pernod Ricard	Whisky – Indian	2.94	3.43	4.24	5.63	6.76	20.1	Domestic/Local
26	Khlibnyi Dar	Bayadera Group	Vodka	0.08	1.06	1.55	3.57	6.63	85.7	Domestic/Local
27	Pyat Ozer	Alcohol Siberian Group	Vodka	0.41	1.08	2.38	6.04	6.54	8.3	Domestic/Local
28	Ballantine's	Pernod Ricard	Whisky – Scotch	5.68	5.63	5.62	6.17	6.50	5.3	International
29	Jägermeister	Mast-Jägermeister	Bitters	4.50	5.20	5.95	6.32	6.41	1.4	International
30	J&B Rare	Diageo	Whisky – Scotch	6.00	5.90	5.90	5.90	5.90	0.0	International
31	Ricard	Pernod Ricard	Anis	6.03	5.72	5.66	5.78	5.52	-4.5	International
32	Jim Beam	Beam Global Spirits & Wine	Whiskey – American-Bourbon	n/a	n/a	5.12	5.24	5.16	-1.5	International
33	Crown Royal	Diageo	Whisky – Canadian	4.20	4.50	4.70	5.00	5.10	2.0	International
34	William Grant's	William Grant & Sons	Whisky – Scotch	4.12	4.10	4.39	4.79	4.97	3.7	International
35	Old Tavern	United Spirits	Whisky – Indian	1.29	1.87	2.55	2.84	4.77	68.0	Domestic/Local
36	De Kuyper range	Koninklijke De Kuyper/ Beam Global Spirits & Wine	Liqueurs	4.86	4.78	4.90	4.90	4.74	-3.3	International

Volume: Millions of 9-litre cases

Full Listing



Millionaires Club 2009

	Brand	Owner	Category	2004	2005	2006	2007	2008	% +/-	Status
37	Chivas Regal	Pernod Ricard	Whisky – Scotch	3.29	3.81	3.95	4.37	4.58	4.8	International
38	Hennessy	LVMH	Cognac	3.73	3.80	4.30	4.73	4.48	-5.3	International
39	Daigoro	Asahi Breweries	Shochu	5.14	5.19	5.24	4.66	4.44	-4.7	Domestic/Local
40	Gordon's	Diageo	Gin	5.30	5.00	5.00	4.50	4.30	-4.4	International
41	Absolvent	CEDC	Vodka	3.80	3.94	4.04	4.12	4.18	1.6	Domestic/Local
42	Director's Special	United Spirits	Whisky – Indian	3.89	4.32	3.77	3.69	4.00	8.4	Domestic/Local
43	Imperial Blue	Pernod Ricard	Whisky – Indian	1.72	2.00	2.51	3.13	3.83	22.4	Domestic/Local
44	Malibu	Pernod Ricard	Liqueurs	2.96	3.23	3.33	3.63	3.70	1.9	International
45	Dreher	Gruppo Campari	Brandy – Brazilian	2.90	3.10	3.50	3.75	3.60	-4.0	Domestic/Local
46	Grey Goose	Bacardi	Vodka	1.80	2.30	3.00	3.60	3.60	0.0	International
47	Kanoka	Asahi Breweries	Shochu	1.90	2.50	3.02	3.44	3.56	3.5	Domestic/Local
48	Dewar's	Bacardi	Whisky – Scotch	3.50	3.50	3.40	3.50	3.41	-2.6	International
49	Havana Club	Pernod Ricard	Rum	2.00	2.32	2.61	3.00	3.40	13.3	International
50	Seagram's	Pernod Ricard	Gin	3.31	3.30	3.44	3.44	3.38	-1.7	Regional
51	Fernet Branca	Fratelli Branca Distillerie	Bitters	2.34	2.55	2.90	3.12	3.28	5.1	International
52	Sky	Gruppo Campari	Vodka	2.10	2.30	2.70	2.90	3.15	8.6	International
53	Sauza	Beam Global Spirits & Wine	Tequila	3.00	2.88	3.12	3.21	3.13	-2.6	International
54	Parliament	CEDC	Vodka	1.12	1.48	2.03	2.70	3.08	14.1	Regional
55	Finlandia	Brown-Forman	Vodka	1.84	2.10	2.30	2.75	3.05	10.8	International
56	Starogardzka	Belvédère	Vodka	3.73	3.19	2.60	2.84	3.01	6.0	Domestic/Local
57	Campari	Gruppo Campari	Bitters	2.90	2.90	2.90	2.93	2.93	0.0	International
58	Dai Jyuhyo	Suntory	Shochu	n/a	3.83	3.83	3.40	2.92	-14.1	Domestic/Local
59	Honey Bee	United Spirits	Brandy – Indian	1.26	1.30	1.73	2.20	2.82	28.2	Domestic/Local
60	Hayward's	United Spirits	Whisky – Indian	2.26	2.96	2.17	2.31	2.77	19.9	Domestic/Local
61	Sobieski	Belvédère	Vodka	1.38	1.67	2.15	2.50	2.75	10.0	International
62	Montilla	Pernod Ricard	Rum	2.29	2.32	2.72	2.67	2.73	2.2	Domestic/Local
63	Jameson	Pernod Ricard	Whiskey – Irish	1.73	1.95	2.18	2.48	2.73	10.1	International
64	Zhuravli	Russian Alcohol Group	Vodka	n/a	n/a	n/a	n/a	2.55	n/a	Domestic/Local
65	Big Man	Oenon Holdings	Shochu	n/a	n/a	n/a	n/a	2.53	n/a	Domestic/Local
66	Seagram's 7 Crown	Diageo	Whiskey – American-Other	2.50	2.50	2.50	2.50	2.50	0.0	Regional
67	Beefeater	Pernod Ricard	Gin	2.37	2.31	2.32	2.42	2.41	-0.4	International
68	Southern Comfort	Brown-Forman	Liqueurs	2.26	2.34	2.45	2.48	2.38	-4.1	International
69	Wyborowa	Pernod Ricard	Vodka	1.00	0.93	1.17	1.78	2.32	30.3	International
70	100 Pipers	Pernod Ricard	Whisky – Scotch	3.16	3.34	2.94	2.50	2.25	-10.0	International
71	Belenkaya	SY Group	Vodka	0	2.96	1.89	2.04	2.25	10.1	Domestic/Local
72	Bell's	Diageo	Whisky – Scotch	2.00	2.20	2.00	2.30	2.20	-4.3	International
73	Yamskaya	Russian Alcohol Group	Vodka	n/a	n/a	n/a	n/a	2.16	n/a	Domestic/Local
74	Kinmen Kaoliang	Kinmen Kaoliang Liquor	Baijiu	1.61	1.49	1.81	1.88	2.15	14.4	Domestic/Local
75	William Peel	Belvédère	Whisky – Scotch	1.53	1.60	1.76	1.78	2.12	19.1	Domestic/Local
76	Tanqueray	Diageo	Gin	2.00	1.90	2.00	2.20	2.10	-4.5	International
77	Russian Standard	Roust	Vodka	0.99	1.03	1.35	1.90	2.10	10.5	International
78	Svedka	Constellation Brands	Vodka	0.45	0.64	1.02	1.51	2.10	39.1	Domestic/Local
79	Bombay	Bacardi	Gin	1.80	1.80	2.10	2.00	2.01	0.5	International
80	Kahlúa	Pernod Ricard	Liqueurs	2.20	2.13	2.17	2.14	2.00	-6.5	International

Full Listing

Millionaires Club 2009

Brand	Owner	Category	2004	2005	2006	2007	2008	% +/-	Status
81	Label 5	Whisky – Scotch	1.56	1.62	1.74	1.91	1.98	3.7	International
82	Teacher's Highland Cream	Whisky – Scotch	1.75	1.75	1.84	1.98	1.96	-0.7	International
83	Canadian Club	Whisky – Canadian	n/a	n/a	2.07	2.04	1.96	-4.0	International
84	Black Velvet	Whisky – Canadian	2.10	2.07	2.10	1.90	1.96	3.2	International
85	McCormick	Vodka	1.93	1.98	2.01	1.80	1.93	7.6	Domestic/Local
86	Blenders Pride	Whisky – Indian	n/a	0.92	1.17	1.51	1.92	27.2	Domestic/Local
87	Old Port Rum	Rum	0.78	0.96	1.38	1.64	1.91	16.5	Domestic/Local
88	Suntory Kakubin	Whisky - Japanese	1.83	1.72	1.60	1.59	1.61	1.3	Regional
89	Ketel One	Vodka	1.50	1.68	1.87	1.88	1.90	1.2	Domestic/Local
90	Popov	Vodka	1.90	1.80	1.80	1.80	1.90	5.6	Regional
91	Czysta de Luxe (ZG)	Vodka	n/a	n/a	n/a	n/a	1.87	n/a	Domestic/Local
92	Canadian Mist	Whisky – Canadian	2.14	2.07	1.98	1.91	1.87	-2.4	Domestic/Local
93	Bols	Vodka	2.08	1.58	1.40	1.67	1.85	10.8	Regional
94	Gold Riband	Whisky – Indian	0.96	1.73	1.72	1.63	1.84	12.9	Domestic/Local
95	Slavyanskaya	Vodka	n/a	1.40	2.10	2.60	1.80	-30.5	Domestic/Local
96	Eristoff	Vodka	1.20	1.40	1.50	1.70	1.79	5.3	International
97	Mansion House Brandy	Brandy – Indian	n/a	n/a	1.00	1.32	1.77	34.6	Domestic/Local
98	John Exshaw	Brandy – Indian	0.98	1.18	1.12	1.49	1.77	18.8	Domestic/Local
99	Director's Special Black	Whisky – Indian	n/a	n/a	0.90	1.34	1.77	32.1	Domestic/Local
100	Luksusowa	Vodka	1.20	1.15	1.15	1.47	1.76	20.0	Domestic/Local
101	Patrón	Tequila	0.36	0.65	1.15	1.60	1.73	7.8	Domestic/Local
102	Clan Campbell	Whisky – Scotch	1.59	1.58	1.56	1.64	1.72	4.9	Regional
103	Old Cask	Rum	1.74	1.78	1.45	1.28	1.72	34.4	Domestic/Local
104	Zoladkowa Gorzka	Vodka	n/a	0.94	1.19	1.36	1.71	25.8	Domestic/Local
105	McDowell's Green Label	Whisky – Indian	2.40	2.27	1.85	1.83	1.70	-7.1	Domestic/Local
106	Rémy Martin	Cognac	1.70	1.70	1.70	1.80	1.70	-5.6	International
107	Cacique	Rum	1.70	1.80	1.80	1.70	1.70	0.0	Regional
108	Barton	Vodka	1.61	1.55	1.58	1.65	1.69	2.4	Domestic/Local
109	Skol	Vodka	1.37	1.39	1.47	1.59	1.59	0.0	Domestic/Local
110	Gosudarev Zakaz	Vodka	n/a	0.10	0.65	1.23	1.59	29.5	Domestic/Local
111	White Mischief	Vodka	n/a	n/a	1.12	1.26	1.57	24.6	Domestic/Local
112	Martell	Cognac	1.16	1.26	1.46	1.61	1.54	-4.3	International
113	William Lawson's	Whisky – Scotch	1.10	1.20	1.30	1.30	1.50	15.4	International
114	Buchanan's	Whisky – Scotch	0.90	1.00	1.30	1.60	1.50	-6.3	Regional
115	Soplica	Vodka	0.81	0.73	1.06	1.29	1.47	14.0	Regional
116	Santa Teresa	Rum	1.03	1.11	1.30	1.40	1.43	2.1	Domestic/Local
117	Silver Cup Brandy	Brandy – Indian	0.25	0.32	0.40	0.79	1.42	80.8	Domestic/Local
118	Pastis 51	Anis	1.76	1.66	1.53	1.49	1.41	-5.4	Regional
119	Clan MacGregor	Whisky – Scotch	1.60	1.50	1.30	1.35	1.37	1.5	Regional
120	Capel	Pisco	1.20	1.36	1.35	1.32	1.37	3.8	Domestic/Local



Full Listing



Millionaires Club 2009

	Brand	Owner	Category	2004	2005	2006	2007	2008	% +/-	Status
121	Domus	Companhia Müller de Bebidas	Conhaque	1.73	1.53	1.46	1.30	1.35	3.8	Domestic/Local
122	Paul Masson Grand Ambre	Constellation Brands	Brandy – American	1.28	1.33	1.32	1.29	1.35	4.7	Domestic/Local
123	Seagram's VO	Diageo	Whisky – Canadian	1.40	1.40	1.30	1.30	1.30	0.0	Regional
124	Gordon's Vodka	Diageo	Vodka	1.50	1.50	1.40	1.30	1.30	0.0	Regional
125	Aperol	Gruppo Campari	Bitters	0.70	0.85	1.00	1.15	1.30	13.0	Regional
126	Royal Challenge	United Spirits	Whisky – Indian	0.94	0.98	1.03	1.17	1.29	10.3	Domestic/Local
127	Bols range	Lucas Bols	Liqueurs	1.21	1.21	1.21	1.26	1.28	1.6	International
128	Black Nikka	Asahi Breweries	Whisky – Japanese	1.40	1.50	1.47	1.11	1.23	10.8	Regional
129	DYC	Beam Global Spirits & Wine	Whisky – Spanish	1.70	1.34	1.42	1.43	1.22	-14.9	Domestic/Local
130	Amaro Ramazzotti	Pernod Ricard	Bitters	1.25	1.26	1.27	1.18	1.22	3.4	Regional
131	Castillo	Bacardi	Rum	1.60	1.50	1.40	1.30	1.20	-7.7	Regional
132	Old Adventurer	United Spirits	Rum	1.14	1.03	1.22	1.12	1.20	7.1	Domestic/Local
133	Burnett's Vodka	Heaven Hill	Vodka	0.51	0.55	0.63	1.00	1.20	20.0	Domestic/Local
134	Courvoisier	Beam Global Spirits & Wine	Cognac	1.20	1.12	1.14	1.17	1.19	2.1	International
135	Christian Brothers	Heaven Hill	Brandy – American	1.15	1.14	1.14	1.15	1.17	1.7	Domestic/Local
136	Romanov	United Spirits	Vodka	0.44	0.52	0.81	0.98	1.17	19.4	Domestic/Local
137	Metaxa	Rémy Cointreau	Brandy – Greek	0.00	0.00	1.10	1.10	1.15	4.5	International
138	Appleton Jamaica Rum	CL World Brands	Rum	1.08	1.11	1.13	1.14	1.15	0.5	International
139	Original Lithuanian Vodka	AB Stumbras	Vodka	0.54	0.70	1.02	1.41	1.10	-21.7	Domestic/Local
140	Cointreau	Rémy Cointreau	Liqueurs	1.20	1.30	1.30	1.30	1.10	-15.4	International
141	Koskenkorva	Alta Corporation	Vodka	1.38	1.25	1.21	1.22	1.09	-10.3	Regional
142	Amarula	Distell Group	Liqueurs	0.69	0.79	0.93	1.08	1.08	0.0	International
143	Sir Edward's	Bardinet	Whisky – Scotch	0.98	1.04	1.26	1.27	1.05	-17.5	International
144	Evan Williams	Heaven Hill	Bourbon	0.93	0.95	0.98	1.03	1.05	1.9	Domestic/Local
145	Larios	Beam Global Spirits & Wine	Gin	1.67	1.45	1.45	1.32	1.04	-21.2	Domestic/Local
146	Presidente	Pernod Ricard	Brandy – Mexican	2.03	0.84	1.16	1.11	1.03	-7.2	Domestic/Local
147	Polonaise	Belvédère	Vodka	n/a	n/a	0.75	1.06	1.02	-3.8	Domestic/Local
148	El Jimador	Brown-Forman	Tequila	n/a	n/a	n/a	0.92	1.02	10.8	Regional
149	Gorbatschow	Henkell & Co	Vodka	1.09	1.13	1.21	1.36	1.02	-25.0	Domestic/Local
150	Zubrowka	CEDC	Vodka	n/a	n/a	n/a	1.00	1.00	0.0	Domestic/Local
151	Klipdrift	Distell Group	Brandy	0.87	0.89	0.94	0.98	1.00	2.0	Domestic/Local
152	Russky Lyod (Russian Ice)	SY Group	Vodka	n/a	n/a	n/a	n/a	1.00	n/a	Domestic/Local

Volume: Millions of 9-litre cases