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"I have worked on this style of event for many years and in most cases, once this format has been experienced, people seldom return to exhibitions" - Mark Jones

The major alcohol players are making brand extensions key to growth strategies. How has such NPD changed the rankings of Britain's 100 Biggest Alcohol Brands?

Branching out

Vince Bamford

Remember Guinness Red? How about Foster's Ice? Diamond Black anyone? Or Carling C2? Just a few examples of the many drinks that have disappeared from pubs and shops over the years.

Yet despite a patchy track record, extensions to established brands keep on coming. Indeed, in today's climate, with wafer-thin margins, low brand loyalty, anti-alcohol campaigning and rapidly changing consumer tastes, the role of the brand extension has never been more important. When you are targeting a generation that changes their mobile phone more frequently than your granddad changed his shirt, being able to introduce something new and exciting under a trusted and recognisable brand is an enviable advantage. Just ask Apple.

Over the coming dozen pages, our annual survey of Britain's 100 Biggest Alcohol Brands – in association with Nielsen – shows how important brand extensions have been to the market in the past 12 months – in some cases making the difference between brand recording a loss or a gain. Indeed, with £64.6m in extra sales, new products accounted for two thirds of the £99m net total sales increase [Nielsen 52w/e 27 April 2013] across the top 100 brands.

So where has innovation been most focused? Who's been most successful? And how is the market most likely to develop?

Lower-abv

Brand extensions have a history of introducing, or at least driving, new categories – such as 'ice' beers in the 90s. And they have been doing it again in the past year with the birth of the lower-abv citrus lager category.

A cynic would argue these extensions mimic the 'lager and limes' of yesteryear, but they tap into two current trends. First, they offer a sweeter profile of fruit flavours, which has fuelled much of the growth in the cider market. Second, they deliver refreshment at a lower abv – which is important not only from a government perspective but also for more and more consumers.

The new citrus beers aren't far removed from Animée and Eve, the 'female-friendly' beers launched by Molson Coors and Carlsberg in 2011 and 2010 respectively and both withdrawn after about a year on the market. But both brewers learned how hard it can be to get a new brand off the ground – particularly when targeting a specific gender. And just months after the demise of Animée – which included a 'zesty lemon' flavour in its line-up – Molson Coors unveiled citrus-flavoured 2.8% abv Carling Zest. Since its roll-out in March 2012, the Zest range has been expanded with seasonal variants and brought £13m in extra sales to the Carling brand – as well being crowned alcoholic drinks brand of the year at The Grocer Gold Awards in June. Without the launch of Zest, the £25.2m brand-wide loss recorded by Carling would have been £38m.

"Ultimately, all brands must evolve and change in order to stay relevant," says Jeremy Gibson, marketing director at Molson Coors, which has been one of the most prolific brewers in terms of brand extensions.

"Extensions and innovations are about meeting a fairly specific criteria of renovating a core brand or moving it into an adjacent category. Brands must seek to address a certain consumer need or requirement, which no other product on the market can address, in a unique and ownable way."

While Zest's lower-strength citrus offering was pretty unique at the time, it has sparked a host of similar launches from rival brewers – with 2.8% abv Carlsberg Citrus and 2% Foster's Radler both launching in February this year. And just last month, Molson Coors went even lower than Zest's abv, with the roll-out of 2% abv Carling Cooler in Asda in lemon and grapefruit flavours.

As well as saving money on brand building, these extensions are punching above their weight when it comes to retail prices. Of course, they tap into consumer demand ➲


Gordon's
STRONGBOW
SMIRNOFF
CARLING
ZEST
CARLING
CIDER
STELLA ARTOIS
CIDRE
PEAR
JACK DANIEL'S
Tennessee
HONEY
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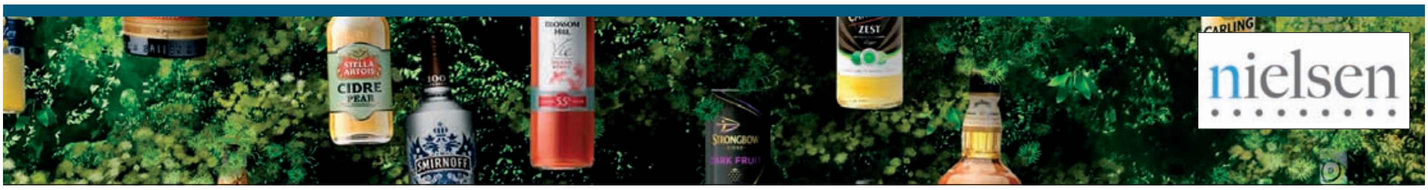


TOP 100 ALCOHOL BRANDS BY VALUE

Total off-trade

RANK	UP/DOWN	BRAND	CATEGORY	SALES (£M)	SALES CHANGE %	CHANGE ABSOLUTE SALES (£M)
1	■ 0	**Stella Artois**	Beers	**489.1**	-4.6%	**-23.42**
2	■ 0	**Foster's**	Beers	**458.4**	9.9%	**41.39**
3	■ 0	**Carlsberg**	Beers	**377.4**	-8.6%	**-35.45**
4	■ 0	**Smirnoff**	Spirits	**374.6**	5.5%	**19.40**
5	■ 0	**Carling**	Beers	**312.6**	-7.5%	**-25.22**
6	▲ 1	**Hardys**	Wines	**255.5**	-2.3%	**-6.00**
7	▼ 1	**Blossom Hill**	Wines	**250.9**	-4.4%	**-11.57**
8	■ 0	**Budweiser**	Beers	**247.6**	-3.0%	**-7.59**
9	■ 0	**Strongbow**	Cider	**235.9**	-0.5%	**-1.15**
10	▲ 2	**Famous Grouse**	Spirits	**193.6**	21.5%	**34.30**
11	▼ 1	**Glen's**	Spirits	**183.3**	-3.0%	**-5.62**
12	▼ 1	**Bell's Original**	Spirits	**167.1**	-3.5%	**-6.10**
13	▲ 1	**Echo Falls**	Wines	**155.0**	5.4%	**8.00**
14	▼ 1	**Gordon's**	Spirits	**153.1**	3.4%	**5.02**
15	■ 0	**Gallo Family Vineyards**	Wines	**132.3**	-5.2%	**-7.26**
16	▲ 1	**Jack Daniel's**	Spirits	**129.1**	10.4%	**12.13**
17	▼ 1	**Jacobs Creek**	Wines	**125.2**	-2.1%	**-2.68**
18	▲ 1	**Bacardi**	Spirits	**124.2**	8.6%	**9.85**
19	▲ 4	**Kronenbourg 1664**	Beers	**103.3**	7.8%	**7.45**
20	■ 0	**Beck's**	Beers	**100.7**	-4.1%	**-4.33**
21	▲ 9	**Isla Negra**	Wines	**100.3**	30.9%	**23.70**
22	▼ 1	**Mondelli**	Wines	**94.9**	-6.2%	**-6.26**
23	▲ 4	**McGuigan**	Wines	**94.2**	13.3%	**11.04**
24	▼ 2	**Bailey's**	Spirits	**93.1**	-3.1%	**-2.97**
25	▼ 1	**Guinness**	Beers	**92.2**	-1.9%	**-1.74**
26	▼ 1	**John Smith's**	Beers	**88.0**	2.0%	**1.70**
27	▲ 5	**San Miguel**	Beers	**82.1**	11.5%	**8.47**
28	▲ 3	**Peroni Nastro Azzurro**	Beers	**80.9**	8.0%	**5.98**
29	▼ 1	**Grant's**	Spirits	**78.0**	-4.5%	**-3.70**
30	▼ 12	**First Cape**	Wines	**77.3**	-33.6%	**-39.20**
31	▲ 2	**Wolf Blass**	Wines	**76.6**	4.6%	**3.38**
32	▲ 5	**Bulmers**	Cider	**74.9**	12.7%	**8.42**
33	▼ 7	**Magners**	Cider	**71.6**	-14.3%	**-11.97**
34	▼ 5	**Lindemans**	Wines	**71.3**	-10.7%	**-8.51**
35	▲ 5	**Concha Y Toro**	Wines	**69.3**	18.7%	**10.93**
36	▼ 2	**Kumala**	Wines	**67.4**	-2.9%	**-2.01**
37	▲ 7	**Kopparberg**	Cider	**67.2**	28.0%	**14.69**
38	▲ 8	**Stella Artois (Cidre)**	Cider	**66.5**	32.7%	**16.39**
39	▼ 3	**Tennent's**	Beers	**64.9**	-4.6%	**-3.10**
40	▲ 2	**Captain Morgan**	Spirits	**62.6**	14.3%	**7.83**
41	▲ 13	**Russian Standard**	Spirits	**62.6**	44.8%	**19.37**
42	▲ 3	**Whyte & Mackay**	Spirits	**59.4**	18.5%	**9.27**
43	▼ 5	**High Commissioner**	Spirits	**57.9**	-8.7%	**-5.53**
44	▼ 3	**JP Chenet**	Wines	**53.7**	-7.0%	**-4.04**
45	▲ 10	**Corona**	Beers	**53.5**	24.1%	**10.39**
46	▼ 7	**WKD**	Rtds	**53.5**	-12.4%	**-7.55**
47	■ 0	**Courvoisier**	Spirits	**53.2**	8.1%	**3.97**
48	▲ 8	**Heineken**	Beers	**47.7**	14.8%	**6.14**
49	▲ 3	**Three Barrels**	Spirits	**46.7**	5.7%	**2.52**
50	▼ 1	**Martini**	Wines	**45.6**	-4.3%	**-2.07**

for lighter beers and help appease health campaigners – but arguably the biggest attraction is their higher margins.

A key reason for this is the reduced tax burden on weaker beers – at 2.8% abv or below, beers are charged at a lower rate. This potentially means better margins – particularly when your low-abv brand extension sells for about the same, or even more, than your parent brand.

Carling Zest, for example, has sold for an average £1.72 a litre – slightly lower than the £1.76 for standard Carling – but Carlsberg Citrus is selling for £1.76 compared with £1.66 for standard Carlsberg; and Foster's Radler is £1.95 a litre against £1.76 for its parent brand.

While Carlsberg says it was unfair to compare the price of Citrus with its standard beer given the short length of time Citrus has been on sale, Heineken is happy to acknowledge the higher price being paid for its low-abv beer.

"Radler is a premium, bottled beer that will be priced at a premium to core Foster's," says a spokesman. "The development and sustainability of this new category is dependent on a robust pricing strategy and retailers will miss out on a significant opportunity to grow lager sales if it is not implemented."

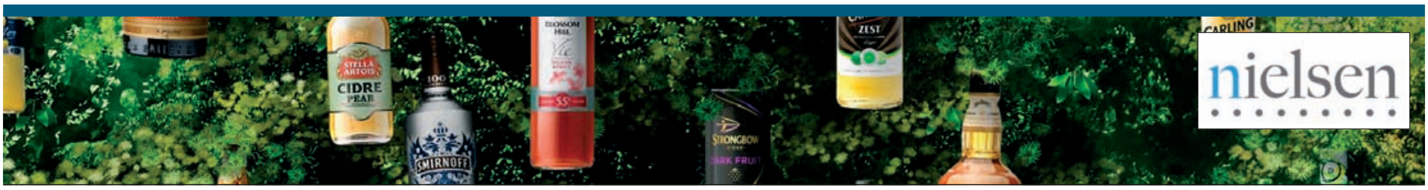
Heineken is also demonstrating that higher-strength beers can add value to a brand – its 4.8% abv Foster's Gold is selling at an average of £2.43 a litre against the £1.76 average for standard Foster's – and Heineken has managed to increase the price of Gold by 3.6% year-on-year at a time when intense promotional activity has kept the price of standard Foster's static.

The higher price isn't deterring shoppers, either, as sales of Gold have risen 28.9% year-on-year to £38.9m without cannibalising the parent brand, which has grown 8%.

Cider

Heineken was slow off the mark in bringing Strongbow – the UK's biggest cider brand by a factor of three – into the flavoured cider market, taking until last June to introduce a pear variant. But the extension has since clocked up £9.2m in sales – helping to offset a £15.1m decline in standard Strongbow. Buoyed by this success, Heineken has been quicker to add another string to its bow with the launch of Strongbow Dark Fruit last month. The company says there is a big opportunity to move drinkers of 'everyday' cider such as Strongbow into flavoured cider.

"However, with a range of new flavours and brands hitting the market, shoppers have more choice than ever before," adds Heineken off-trade sales director Martin Porter. "So it's important that beer and cider companies, and indeed other alcohol manufacturers, read



New shoots: could these overseas brand extensions one day find a place on UK shelves?

Heineken Premium Light: Light beers have previously struggled in the UK, but perhaps they were simply ahead of their time. The success of Carling Zest has shown there is a market for lower-alcohol products if marketed correctly, so perhaps the next generation of US light beers could find an audience here. Launched in 2005, Heineken Premium Light contains 99 calories a bottle.

Jim Beam White Ghost: Spirits NPD tends to be confined to ages or flavours, making this development from Jim Beam stand out more than most. White Ghost is a white version of Jim Beam whiskey and said to be light-bodied with subtle character and a hint of smoky vanilla. Already available in the UK through a few specialist suppliers, this could help break down barriers to trial.

Bud Select 55: The US market is now marketing even lighter beers. Budweiser Select 55 – containing just 55 calories a bottle – was Bud's answer to Miller Brands' 64-calorie Miller Genuine Draft 64, now labelled Miller 64. Select 55, a golden lager "made with caramel malts and a blend of imported and domestic hops", is the companion to Bud's 99-calorie Budweiser Select.

Guinness Black Lager: Trialled in Ireland and already sold in the US, a spokesman said the drink represented "a unique opportunity" for Diageo GB. "We will continue to monitor its performance around the globe closely, and if we decide to launch in the UK we will do so at the right time with the right support."

Desperados Red: Spirit-flavoured beers are a growing market, so although it says it currently has no plans to extend its Desperados brand, Heineken must be keeping an eye on the potential to introduce British drinkers to some of the lines available outside the UK. Among these is Desperados Red, which adds natural stimulant guarana to the mix.

Stella Artois Black: AB InBev hasn't been afraid of sacrificing volume to maintain Stella's value, a strategy that an off-trade premium Stella Artois Black would complement. Currently available in 'selected' on-trade outlets, Black is "matured longer using the finest ingredients such as female Saaz hops to impart a richer, full-bodied flavour and a crisp refreshing aftertaste."

the marketplace to ensure their product or flavour extension meets consumer demand."

The most successful brand extension within cider, of course, was AB InBev's trailblazing Stella Artois Cidre – a revolutionary cross-category launch in 2011 that has continued to deliver, with value up 32.7%% year-on-year. Of the £16.3m growth, £9.3m has come from the pear variant launched in May 2012.

Molson Coors has followed Stella's lead this year, expanding Carling into cider through Carling British Cider (which came to market in April and consequently does not feature in The Grocer's Biggest Alcohol Brands data) and promising consumers "the most refreshing-tasting cider in the market". Carlsberg has also entered the cider market in the past year, but made its debut under the Somersby brand, which it sells in more than 20 countries.

Wines & spirits

While beer and cider brands have undoubtedly been the most active when it has come to extending brands of late, the same trends are also influencing wine and spirits.

"Consumers are looking for lighter drinks that allow them to stay in control," says one industry observer. "You can see this happening in wine with NPD like moscato."

Many wine aficionados have tipped moscato – which is naturally lower in alcohol than many other varieties – as a growth area, but some suppliers are developing new wine-based drinks to target demand for lower strength. Percy Fox, for example, last summer extended its Blossom Hill brand with the 5.5% abv Vie range and introduced three lower-abv 'Light' wines to its Arniston Bay selection. Again, it was easier and more effective to do this under an existing brand.

Conversely, development in spirits is still mostly around flavour extensions as opposed to lower abv. Diageo continued its strategy of introducing new flavour variants to its £375m Smirnoff brand with the launch of an espresso flavour this year. The fact many of the brand's flavour variants – worth about £20m in total – are in value decline shows the importance of keeping such offers fresh

> **"There has been strong growth in flavoured spirits due to the growing trend for sweeter tastes"**
>
> *Crispin Stephens, BBFB*

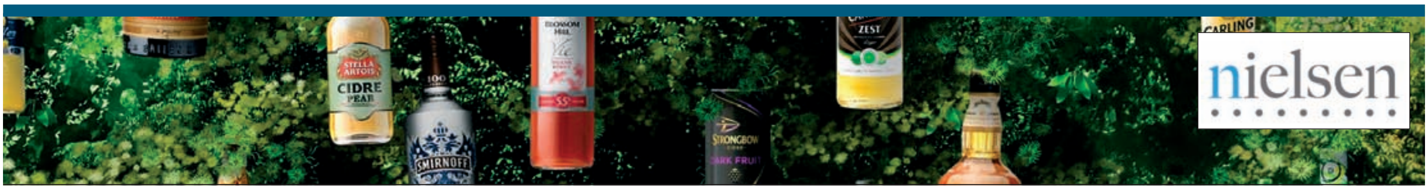
and on-trend. Diageo has also continued to grow Baileys with new flavours – introducing an Orange Truffle variant that has brought in £3.1m in sales.

Talk to buyers, however, and the flavour extension they get most excited about is Jack Daniel's Tennessee Honey, which has clocked up £11.4m in off-trade sales and contributed almost all the growth in the Jack Daniel's brand. "This drink complements the parent brand, broadens the occasions and offers a different drinking ritual – drinking neat – for an iconic brand," says one supermarket drinks buyer.

Nearly half the consumers who have tried the product had not previously tried Jack Daniel's, adds brand owner Bacardi Brown-Forman Brands.

"There has been strong growth in flavoured spirits due to the growing trend for sweeter tastes," says BBFB trade marketing manager Crispin Stephens. "Therefore we knew there would be a huge demand for a product like Jack Daniel's Tennessee Honey. It was our first piece of NPD since the launch of Gentleman Jack 10 years ago, as we wanted to ensure we took time to get the product right.

"Innovation in flavours has helped recruit a new generation of drinkers to the whisky



TOP 100 ALCOHOL BRANDS BY VALUE

Total off–trade

RANK	UP/DOWN		BRAND	CATEGORY	SALES (£M)	SALES CHANGE %	CHANGE ABSOLUTE SALES (£M)
51	▼	8	Oyster Bay	Wines	45.2	–16.3%	–8.81
52	▼	2	Lambrini	Perry	44.9	–4.8%	–2.27
53	▼	5	Banrock Station	Wines	44.4	–8.7%	–4.22
54	▲	7	Old Speckled Hen	Beers	42.3	10.7%	4.10
55	▲	8	Campo Viejo	Wines	41.2	17.5%	6.15
56	▲	1	Canti	Wines	40.3	–2.4%	–1.00
57	▲	30	Barefoot	Wines	40.0	58.6%	14.78
58	▲	2	Frosty Jack's	Cider	39.8	0.1%	0.02
59	▼	8	Teacher's Highland Cream	Spirits	38.1	–19.0%	–8.95
60	▲	4	Moët & Chandon	Wines	37.5	9.6%	3.29
61	▲	5	Freixenet	Wines	36.8	16.9%	5.32
62	▼	3	Oxford Landing	Wines	35.6	–12.4%	–5.02
63	▼	28	Ogio	Wines	35.5	–48.0%	–32.85
64	▲	10	Calvet	Wines	35.3	19.3%	5.70
65	▲	3	Dino	Wines	34.9	13.2%	4.07
66	▲	55	Yellow Tail	Wines	34.4	115.1%	18.42
67	▲	2	Southern Comfort	Spirits	33.6	8.8%	2.72
68	▲	5	Brancott Estate	Wines	33.5	13.1%	3.88
69	▲	44	Coors Light	Beers	33.4	85.5%	15.41
70	▲	2	Pimm's	Spirits	33.1	10.2%	3.07
71	▲	24	Bombay Sapphire	Spirits	32.1	40.0%	9.18
72	▲	18	Vina Maipo	Wines	31.5	27.1%	6.72
73	▲	7	Black Tower	Wines	31.1	10.7%	3.00
74	▲	18	Villa Maria	Wines	30.7	27.4%	6.61
75	▲	19	Absolut	Spirits	30.0	25.0%	6.01
76	▲	13	Wairau Cove	Wines	29.5	19.1%	4.74
77	▼	24	Namaqua	Wines	29.0	–33.7%	–14.76
78	▼	11	Glenfiddich	Spirits	28.5	–8.8%	–2.73
79	▼	17	Arniston Bay	Wines	27.9	–22.5%	–8.09
80	▲	1	Malibu	Spirits	27.8	0.9%	0.24
81	▲	22	Cobra	Beers	27.2	28.2%	5.98
82	▲	4	Chekov Imperial	Spirits	26.7	5.5%	1.39
83	▲	5	Disaronno	Spirits	26.1	4.5%	1.13
84	■	0	Harveys	Wines	26.1	–1.4%	–0.36
85	▼	14	Crabbie's	Rtds	25.9	–14.4%	–4.36
86	▼	28	Turner Road	Wines	25.8	–36.8%	–15.01
87	▲	59	Lion's Gate	Wines	25.7	2428.9%	24.72
88	▼	11	Vina Albali	Wines	24.9	–14.0%	–4.05
89	▲	8	Lanson	Wines	24.8	9.7%	2.19
90	▼	15	Tennent's Super	Beers	23.9	–18.8%	–5.54
91	▲	46	Gran Familia	Wines	23.8	108.2%	12.37
92	▼	13	Smirnoff Ice	Rtds	23.7	–16.8%	–4.78
93	▲	3	Veuve Clicquot	Wines	23.1	2.2%	0.51
94	▼	16	Boddingtons Draught Bitter	Beers	23.1	–19.3%	–5.50
95	▲	6	Jameson	Spirits	22.9	7.5%	1.59
96	▲	16	Jagermeister	Spirits	22.6	23.5%	4.29
97	▲	9	Westons	Cider	22.1	10.5%	2.10
98	▼	7	Holsten Pils	Beers	21.8	–11.7%	–2.88
99	▼	34	Stowells	Wines	21.8	–33.6%	–11.04
100	▼	7	Wines From France	Wines	21.6	–10.4%	–2.49

"Taking a brand built on strength and launching a weak variant may not be the smartest move"

Don Williams, owner, Pi Global

category, broadening the brand's appeal," he adds.

It's not just about flavour variants, however. Even for a premium product, like Jack Daniel's Tennessee Honey, value is paramount in these economic conditions, says BBFB. Introducing 35cl and 20cl formats, these are growing twice as fast as the total spirits market, it reports.

But whatever the demands of the consumer – new pack sizes, new flavours, different alcohol strength or even a shift into another category – suppliers must always bear in mind the risk in stretching a brand too far, warn experts. "A brand has to have a credible personality, a distinct story that gives it character – how it's crafted, where it's from, its history, what its ingredients are. This is what makes alcohol brands believable and desirable," says Don Williams of global design and branding agency Pi Global. "Taking a brand built on strength credentials and launching a weak variant may not be the smartest move in the world for long-term brand health."

In other words, a Tennent's Super 2% 'Radler' makes no sense. But if a a new etensions can convey the brand's essence, it's worth cultivating

Methodology: *Britain's 100 Biggest Alcohol Brands uses data from Nielsen's ScanTrack service, which monitors weekly sales from a nationwide network of EPoS checkout scanners plus some manual audits. Coverage is taken from grocery multiples (including their dark-store sales), co-ops, multiple off-licences, multiple forecourts, convenience multiples and symbols. The data is for the period MAT to 27 April 2013. Sales figures include all variants for the total brand within a given category (beer, cider, wine), ie Stella Artois includes 4% and Stella Artois; while Stella Cidre is counted separately and includes all fruit cider variants. Still, sparkling and fortified wine all come under the category 'Wines'. Ones to Watch comprises the 10 brands ranked between 101 and 150 in Nielsen's database posting the biggest value sales growth.*

Vladivar is out-performing the vodka category
at +8% growth v +3%*

35cl sku driving sales, growing ahead of the category
at +34% growth v -0.7%*

Very.co.uk consumer promo across all bottle sizes to
win a wardrobe worth £500

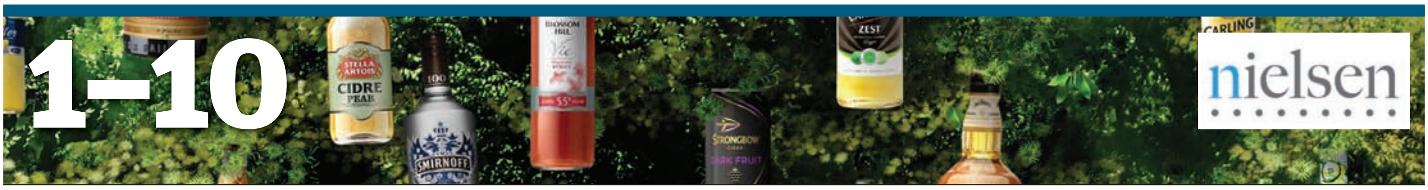
Digital campaign directly targeting
over 1/2 million consumers

drinkaware.co.uk

*Source: ACNielsen MAT to 22.06.13 value % change

very.co.uk

VLADI GOOD VODKA



1 (1)
Stella Artois

SALES: £489.1m **GROWTH:** −4.6%

They knew there would be consequences. But AB InBev says it had to step off the pile 'em high, sell 'em cheap merry-go-round that is the off-trade lager fixture to ensure the long-term health of its flagship brand.

After holding back the rising tide of increasing duty and input costs for years, the dam has now burst. The average price of Stella Artois has climbed 2.9%; Stella 4 has surged 9.2%. The latter has borne the brunt of the price increases with value and volume crashing by double digits, while the core brand's decline has been more or less in line with the rest of the lager market.

The reasons for this are two-fold: not only has the price differential between the two narrowed by 10p a litre in the past year, but AB InBev has found it harder to differentiate between them since cutting the abv on the core brand to 4.8% in January 2012.

With Foster's Brad and Dan (see right) breathing down Stella's neck for the number one spot, the plan for the brand in the coming year is to run greater shopper engagement-based activity in-store and lay off simple, price-led promotions.

It might take more than that to stave off the advances of the Aussies, who have benefited from the launch of a premium variant in the shape of Foster's Gold, though. But then Stella could have a trump card up his sleeve: the on-trade-only Stella Black could tap the growing trend in the off-trade for posher lagers, though AB InBev says it has no plans to launch it in the multiples.

3 (3)
Carlsberg

SALES: £377.4m **GROWTH:** −8.6%

Price isn't everything in lager. Carlsberg's average price only climbed 1.5% in the past year yet it's suffered the steepest slump of the big four lagers. It is fighting back: in February it launched Carlsberg Citrus to tap the weaker, fruitier beer trend and a month later invested £4m in TV ads for the core brand. It's also the Premier League's official beer from next season.

4 (4)
Smirnoff

SALES: £374.6 **GROWTH:** 5.5%

Britain's biggest spirit continues to grow, despite mounting competition (see Russian Standard p60). How? Keeping tabs on price, more flavour variants and, from October, the latest leg of the Smirnoff Nightlife Exchange in a £7m Europe-wide push including TV. Things may turn sour, however, with Sainsbury's reducing Diageo space in a pricing spat.

5 (5)
Carling

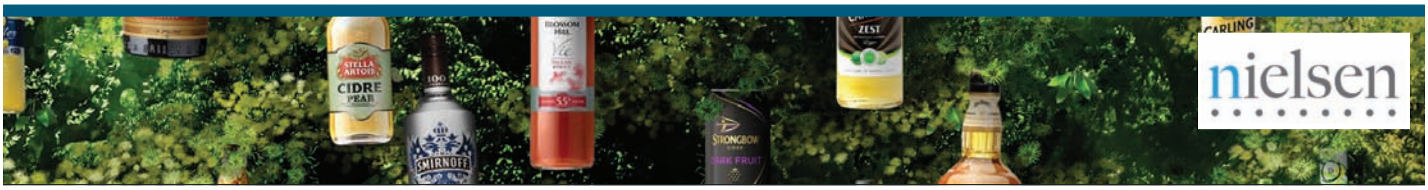
SALES: £312.6m **GROWTH:** −7.5%

It may have had £25.3m wiped off its value in the past year, but Carling has a few tricks up its sleeve. With the core brand still declining, Molson Coors is looking to (you guessed it) low-abv fruit-flavoured variants. Carling Zest – launched March 2012 – has racked up range sales of £13m in its first year and Carling Cooler soft-launched in Asda last month.

6 (6)
Hardys

SALES: £255.5m **GROWTH:** −2.3%

Although volumes fell, value decreases were less steep and Accolade says Hardys is in "a good place". Premium range William Hardy was launched in October 2012 while ongoing sponsorship of Come Dine With Me boosted the brand's profile. A 360 campaign, NPD and revamped packaging to underline heritage rolls out in the autumn.



2 (2)

Foster's

SALES: £458.4m **GROWTH:** 9.9%

They've given it a red hot crack over the past year, as Brad and Dan would say. And it's paid off.

Not only has the core brand surged 8% thanks to a tight lid being kept on average price (it's stayed static at £1.76 a litre) and heavyweight TV support including sponsorship of comedy on Channel 4, but value and volumes of Foster's Gold – the premium brand extension launched in July 2011 – have surged by double digits over the past year.

Now worth £38.9m in the off-trade, Gold is proof that brewers can convince drinkers to pay more for their beer so long as they give them a compelling reason to do so.

Fetching an average of £2.43 a litre, Gold is clearly differentiated from the core brand in terms of price (a fact cemented in its marketing) and allows Foster's to rub shoulders

with much more premium and pricier brews.

The core brand and Gold will continue to be supported in the coming year, says Heineken UK – not least through TV ads focusing on the brand's heritage dating back to 1888 – while the brand owner will also give the 2% abv lemon mixer Foster's Radler, launched in February, further backing with TV and outdoor advertising.

Given Radler's low abv and the premium it carries over standard Foster's, if Heineken wants to protect its margins over the coming year, that sounds like a good call.

7 (6)

Blossom Hill

SALES: £250.9m **GROWTH:** –4.4%

Despite a £1.8m sponsorship deal for the new Dallas on C5 from early September 2012, Blossom Hill's sales slid. The brand claims the launch of much-trumpeted lower-abv Blossom Hill Vie last summer has been a "real success" – although it has only racked up £693k sales. New 50cl formats rolled out in May to push the midweek occasion.

8(8)

Budweiser

SALES: £247.6m **GROWTH:** –3%

Many of AB InBev's lager brands have suffered as a result of its policy of cutting back on deals. While Bud's sponsorship of the FA Cup got into full swing with interactive cans, sales were hit as the average price per litre increased from £2.12 to £2.19. Volumes fell 6.1% twice as fast as value, suggesting the brewer is having some success in returning value to the sector.

9 (9)

Strongbow

SALES: £235.9m **GROWTH:** –0.5%

Britain's biggest cider brand is eating itself from the inside. Strongbow Pear, launched June 2012, may have racked up £16.9m in its first year but the core brand has lost £18m. Heineken hopes the May launch of Strongbow Dark Fruits will tap the booming fruit cider market. It is also supporting the brand with a new Earn It campaign, launched in June.

10 (12)

The Famous Grouse

SALES: £193.6 **GROWTH:** 21.5%

Grouse came out of last summer 60k cases up on the previous year following the launch of the Famous Dad gift pack for Father's Day; while Grouse's first TV campaign outside Christmas was also well reviewed. Retailers used the brand as a footfall driver through the year but low prices had to end. In April the 70cl rsp rose from £16.49 to £17.10.

Winning Brands...

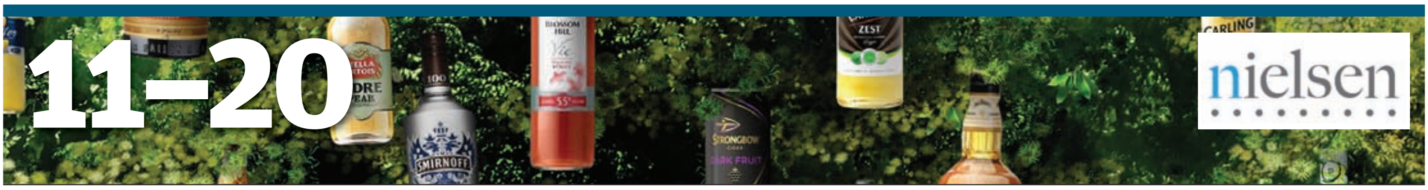
- **Carling**
  No. 1 brand in the UK [1] with an exciting new campaign now live! Already a great success with 18-24yr olds [2].
- **Corona**
  No. 1 Mexican lager and sales growing 24% year on year. [3]
- **Coors Light**
  A new entry in the Grocer Top 100 and the fastest growing lager with sales in growth 85% year on year. [3]
- **Cobra**
  Gold at The Monde Selection World Quality Awards, taking the total to 65! And sales continuing to grow at 30%. [3]
- **Carling British Cider**
  NEW to the market and already an award winner with Gold at The International Brewing Awards, cider category.
- **Carling Zest**
  Alcohol Drinks Brand of the Year, The Grocer Gold Awards, delivering 40% incremental sales. [4]

Sources: (1) CGA & Nielsen Scantrack Value April 2013 (2) MCBC Research July 2013
(3) Nielsen Scantrack MAT April 2013 (4) Kantar World Panel we 25th Nov 2012

drinkaware.co.uk
for the facts

MOLSON Coors

Are you stocking the range to make profits soar this summer?



16 (17)

Jack Daniel's

SALES: £129.1m **GROWTH:** 10.4%

Jack has a lot to thank his bees for. Without the May 2012 launch of Tennessee Honey, sales of the core brand and variants Gentleman Jack and Single Barrel would be more or less flat. But this sweeter extension has kept up the buzz in JD. Tennessee Honey has racked up £11.4m in sales through the supermarkets since launch and – according to Bacardi Brown-Forman Brands – helped introduce younger drinkers to Jack.

And it's the young and hip Jack is gunning for with the 2013 J.D. Roots campaign, a series of homecoming gigs across the UK featuring the likes of Geordie indie rockers Maximo Park and scouse Paul McCartney doppelganger Miles Kane. It's also advertising heavily in music mag NME.

This isn't just a cynical attempt to corner newcomers to the category either – Jack himself was a music lover, apparently. "Jack Daniel's has a history of supporting music, going way back to when Mr Jack himself formed The Silver Cornet Band in 1892, whose job it was to entertain the Lynchburg community and dignitaries," says Mark Davis, area marketing manager for American whiskey at BBFB.

And if all that's not going to prick the attention of Jack's trendy target audience, anticipation about this year's 'birthday' gig surely will.

11 (10)

Glen's Vodka

SALES: £183.3m **GROWTH:** –3.0%

Glen's falling sales are actually flattered by a hike in average price of over £1/litre, narrowing the differential from more premium brands. A lack of flavour variants further limits growth opportunities.

12 (11)

Bell's

SALES: £167.1m **GROWTH:** –3.5%

Grouse has stolen Bell's perch as Britain's biggest whisky. A 4.2% hike in average price made a litre 30p pricier. And while Grouse now has three brand variants in its nest, Bell's is all alone.

13 (14)

Echo Falls

SALES: £155.0m **GROWTH:** 5.4%

Echo Falls bounced back this year despite relatively flat volume sales. Its ongoing Come Dine With Me sponsorship and 105k Facebook fans helped, along with revamped designs and new listings.

14 (13)

Gordon's

SALES: £153.1m **GROWTH:** 3.4%

From link deals with Bottle-green to new flavours and flavoured premixes, Gordon's is fighting smart. Sloe Gin achieved 14.4% growth while Crisp Cucumber racked up £400k in its first two months.

15 (15)

Gallo Family Vineyards

SALES: £132.3m **GROWTH:** –5.2%

Gallo continues to concentrate on lighter styles but new 5.5% abv Summer White is garnering the biggest share of this year's focus. A multimillion pound campaign including ads on C5 has Louise Redknapp on board.

17 (16)

Jacob's Creek

SALES: £125.2m **GROWTH:** –2.1 %

Wimbledon was at the heart of activity for Jacob's Creek this year, with the bottles decked in tennis white – to address wine volumes down 1%. Sales of the higher-priced sparkling wines fell 13.7% by value.

18 (19)

Bacardi

SALES: £124.2m **GROWTH:** 8.6%

Rum has been one of the fastest-growing spirits in recent years and Bacardi is up in both value and volume, with its spiced spin-off Oakheart – launched in August 2011 – having grown 202.7% to £7.4m in the mults.

19 (23)

Kronenbourg 1664

SALES: £103.3m **GROWTH:** 7.8%

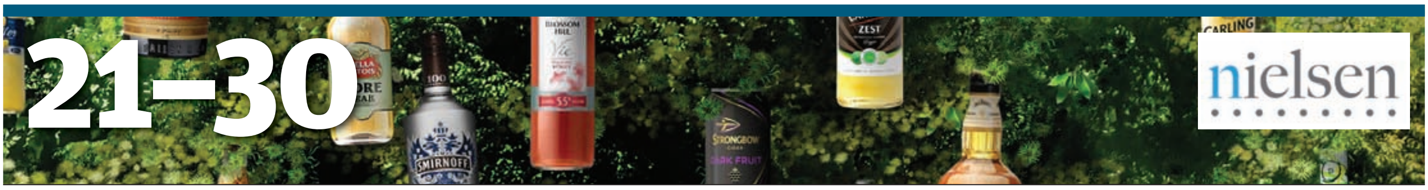
One of only five of Britain's bestselling beers to cut its average price this year, 1664 was also repositioned in January with the help of Eric Cantona, who revealed his admiration for hop farmers.

20 (20)

Beck's

SALES: £100.7m **GROWTH:** –4.1%

Strong growth for Beck's Vier and alcohol-free Beck's Blue – but a sharp decline for the core Beck's Bier brand. The combined £5m growth of Vier and Blue helped offset the £9.3m losses suffered by Bier.



30 (18)
First Cape

SALES: £77.3m **GROWTH:** –33.6%

The South African brand reinforced its association with rugby with a global sponsorship of the British and Irish Lions Tour. However, the strategy of targeting several countries in one go – the UK, Ireland, Hong Kong and Australia – seems to have benefited international markets ahead of the UK, where sales fell across its portfolio, with volumes down by up to 39% on its core still wines.

First Cape maintains the heavy investment in the sponsorship was a "huge benefit to the UK market" but is wary of the UK duty regime. "It is a new dawn and no-one is expecting to sell the kind of volumes we used to in the UK," joint director Steve Barton says. As a result, the brand is "reviewing completely" its spend, investments and the strategic view and location of the brand in the UK.

One area it says it is happy with is the lighter, low-alcohol style – sales fell less steeply than sparkling or still wine, down 30.2% in value on volume down 22% – and First Cape insists it is still opening up a new niche. However, the "money-making" mid-tier, including Cape Heritage, launched in February 2012, is likely to become increasingly important – and one where other modern brands will have to migrate towards.

21 (30)
Isla Negra

SALES: £100.3m **GROWTH:** 30.9%

Taking to the road in an airstream caravan paid off for Chilean wine brand Isla Negra. It travelled to seaside music and food festivals across the UK in 2012 in a sampling tour targeting 25,000 consumers.

22 (21)
Mondelli

SALES: £94.9m **GROWTH:** –6.2%

A star performer last year, Sainsbury's exclusive Mondelli has tailed off. An average 20% price hike on sparkling wine saw volumes fall 28%, but still wine (which makes up the lion's share) fell 8% by volume.

23 (27)
McGuigan

SALES: £94.2m **GROWTH:** 13.3%

A series of industry awards including IWSC International Winemaker of the Year three times in four years has helped McGuigan's steady growth. Now there's a web food-matching partnership with John Torode.

24 (22)
Baileys

SALES: £93.1m **GROWTH:** –3.1%

A six-figure campaign to encourage festive season sales failed to return Baileys to growth. Diageo concedes that a reduction in deep discounting had a "short-term" knock-on effect in the second half of 2012.

25 (24)
Guinness

SALES: £92.2m **GROWTH:** –1.9%

A fall in sales of £1.7m represents a steadying of the ship after the Black Stuff lost £8m the previous year. A second Made of More ad, Clock, aired in January, backed by £5.5m media spend.

26 (25)
John Smith's

SALES: £88.0m **GROWTH:** 2%

John Smith's remains the UK's bestselling ale brand despite price rises that resulted in volume slippage. The abv was reduced from 3.8% to 3.6% at the start of 2013 to bring it in line with competitors.

27 (32)
San Miguel

SALES: £82.1m **GROWTH:** 11.5%

Backed by ads celebrating 'Una Vida Bien Vivida', San Miguel, brewed in the UK, is cashing in on the growing popularity of world lagers. Last year saw the launch of easy-drinking brand extension San Miguel Fresca.

28 (31)
Peroni

SALES: £80.9m **GROWTH:** 8.0%

With a litre selling for an average of £3.53, Peroni is the priciest beer in the top 100. Yet still it grows, buoyed by its Italian provenance and cool-as-ice image. A Skegness pub was even refused supply.

29 (28)
Grant's Family Reserve

SALES: £78.0m **GROWTH:** –4.5%

It's the most decorated blended whisky in the world, and there's no shortage of variants either, (ale cask, sherry cask, 12-year-old, etc). Maybe the average 6p a litre premium over Famous Grouse is what's hurting sales.


Sip into summer
Introducing
new lighter & fruitier
Summer White
83%
Purchase
Intent!*
££
Multi Million
Campaign
Now
On TV!
Gallo
FAMILY
VINEYARDS
Summer White
LIGHT & FRUITY
ONLY
5.5%
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for the facts drinkaware.co.uk
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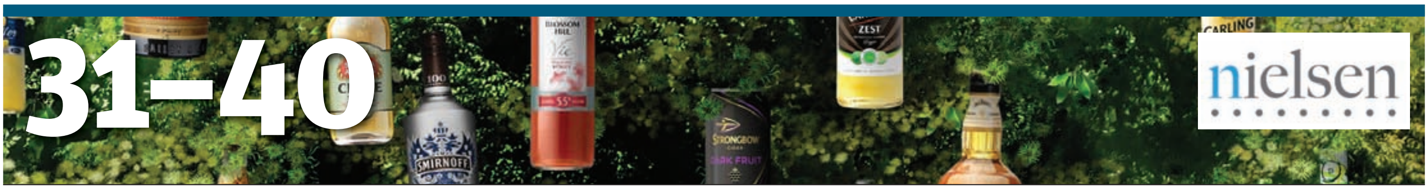
Gallo
FAMILY
VINEYARDS



38 (46)
Stella Artois Cidre

SALES: £66.5m **GROWTH:** 32.7%

It's inspired a host of copycat launches from rival lager brands, such as Carlsberg Somersby and Carling Cider. But the key to Cidre's success, says AB InBev UK & Ireland president Inge Plochaet, is not the use of the powerful Stella brand. It's simply its taste.

There was pressure to bring the product to market earlier than its 2011 debut but the flavour had to be right. "A lot of research and work went into liquid development," she says.

"If, as some people suggest, you are risking the reputation of a brand like Stella, you need to be really sure you know what it stands for and that the product side is also right. Cidre has a real intense apple taste and performs really well in blind tastings."

Just over a year ago Stella backed up the success of its Jonagold apple version with a pear variety, and it's notched up an impressive £3.3m of sales in just under 10 months since hitting the shelves.

Having effectively created a new category of big beer brand ciders, it will be fascinating to see whether the market can sustain so many new contenders, and whether Cidre's growth will be curtailed. Already the UK's second-biggest premium cider brand, it seems just as likely to us that Cidre will challenge more conventional ciders than lose out to lager crossovers.

31 (33)
Wolf Blass

SALES: £76.6m **GROWTH:** 4.6%

Don't go thinking Wolf Blass's growth is all down to inflation: volumes are up, too, following a cut in average prices. The brand is looking to build on growth through its Sky Sports sponsorship of the Ashes.

32 (37)
Bulmers

SALES: £74.9m **GROWTH:** 12.7%

Bulmers enjoyed an exceptional year thanks to new flavoured ciders. In addition to renaming No 17 cider as Crushed Red Berries & Lime (up 161.6% y-o-y in sales), it unveiled Bold Black Cherry and Pressed Red Grape.

33 (26)
Magners

SALES: £71.6m **GROWTH:** −14.3%

A slight average price cut (of 2p a litre) couldn't arrest a dramatic fall in volume sales of Magners. C&C Group remains committed to Magners Original "while making sure there is investment in Pear and Berry".

34 (29)
Lindeman's

SALES: £71.3m **GROWTH:** −10.7%

Increasing its average price 5.2%, Lindeman's moved away from deals, so sales were hit. In January it rebranded its Sweet Seasons range to Early Harvest Fruity – 25% lighter in alcohol and calories.

35 (40)
Concha y Toro

SALES: £69.3m **GROWTH:** 18.7%

Concha y Toro is targeting the UK's £8-to-£10 wine category. A new ad for Casillero del Diablo will hit TV and cinema screens in September, followed by the launch of the Devil's Collection blends.

36 (34)
Kumala

SALES: £67.4m **GROWTH:** −2.9%

With a 1.3% drop in price per litre, the South African wine's performance is disappointing, but it hopes a year-long promo with John Lewis on its Facebook page (with 40,000 fans in its first four months) will pay off.

37 (44)
Kopparberg

SALES: £67.2m **GROWTH:** 28.0%

The pioneer of whacky fruit ciders has launched Cloudberry and Elderflower & Lime. Backed by summer ads and support for the music festival circuit, the Swedish brand is hoping to build on a stunning year.

39 (36)
Tennents

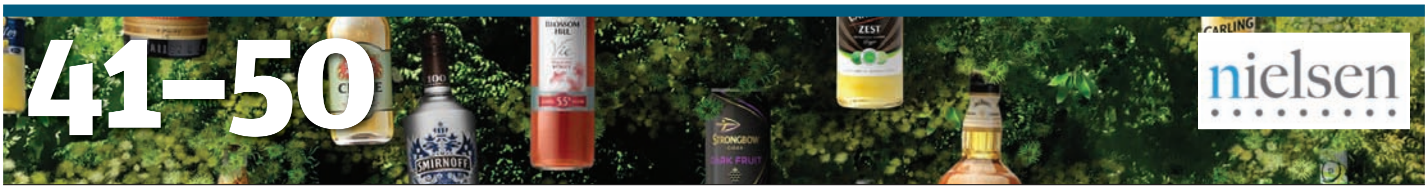
SALES: £64.9m **GROWTH:** −4.6%

Scotland's favourite pint, says C&C. If so, Scotland's going off its beer. The 20th anniversary of the T in the Park festival and a commitment to 100% Scottish barley may revive sales. It's also looking to expand overseas.

40 (42)
Captain Morgan

SALES: £62.6m **GROWTH:** 14.3%

Despite a cutback in promo activity, contributing towards a 3.1% increase in average price, value and volume are growing by double digits. But all the growth is from Spiced – the core rum actually fell 10.5%.



41 (54)

Russian Standard

SALES: £62.6m **GROWTH:** 44.8%

Russian Standard, which claims to be the world's bestselling Russian premium vodka, has put in a stellar performance this year.

Distilled and bottled in St Petersburg, and distributed in the UK by Whyte & Mackay, its performance was driven by its credentials as an "authentic, superior quality" spirit, supported by investment in promotions and integrated marketing.

It's a combination that has helped make the UK Russian Standard's largest international market, with volume sales of half a million nine-litre cases in 2012.

"Brand credibility and continued investment over many years have helped Russian Standard consistently outperform the vodka category in all channels," said a spokesman for the business. "We have in the past 12 weeks seen accelerated growth."

The investment is continuing this summer with a £7m UK push, including a TV campaign running now. The activity also includes a stronger focus on social media, a new website due to launch next month, price-marked packs and sponsorship of two of the Lovebox and Wilderness festivals.

And the summer marketing push is set to be followed by another multimillion investment this winter.

42 (45)

Whyte & Mackay

SALES: £59.4m **GROWTH:** 18.5%

Clearance for Diageo's acquisition of a stake in owner United Spirits may require Diageo to sell on some or all of Whyte & Mackay's Scottish distilleries. The brand sponsors the Force India F1 team.

43 (38)

High Commissioner

SALES: £57.9m **GROWTH:** –8.7%

The UK's fifth-bestselling Scotch, and a mainstay of 'affordable' spirits, is vulnerable to Scotland's proposed minimum pricing legislation, which could increase its price by more than 50%.

44 (41)

J P Chenet

SALES: £53.7m **GROWTH:** –7%

Chenet's performance has been as skew-wiff as its bottles. The brand hopes the launch of the premium, 5.5% abv Fashion range (designed to compete with fruit-based ciders) will stop sales turning sourer.

45 (55)

Corona

SALES: £53.5m **GROWTH:** 24.1%

Riding the world beer boom, Mexican import Corona goes from strength to strength, backed by a major outdoor ad campaign, focusing on the ice bucket serve. Last year saw the launch of 710ml sharing bottles.

46 (39)

WKD

SALES: £53.5m **GROWTH:** –12.4%

Sales were far from WKD in the past 12 months with a dramatic drop in volumes, although SHS Drinks has pledged to invest in "heavyweight support" in 2013, with WKD Orange and WKD Green rolling out this month.

47 (47)

Courvoisier

SALES: £53.2m **GROWTH:** 8.1%

Courvoisier's efforts to make cognac a hip and trendy drink are paying off, with impressive sales growth. Maxxium is now focusing on its more premium varieties such as its cocktail-focused Exclusive and XO.

48 (56)

Heineken

SALES: £47.7m **GROWTH:** 14.8%

Whether it's as Official Lager of London 2012, its notorious role in Skyfall, or ongoing support for the Champions League and Heineken Cup rugby, sponsorship is getting Heineken noticed.

49 (52)

Three Barrels

SALES: £46.7m **GROWTH:** 5.7%

Three Barrels is continuing to pursue younger drinkers by promoting its versatility in cocktails and as a food accompaniment. It has also developed new packaging to bring the brand up to date.

50 (49)

Martini

SALES: £45.6m **GROWTH:** –4.3%

Barcardi Brown-Forman Brands is "reinventing" Martini in the UK in a bid to revive sales, splashing out £1.5m on Royal events and special limited-edition bottles to mark the vermouth's 150th anniversary.

Aperol Spritz

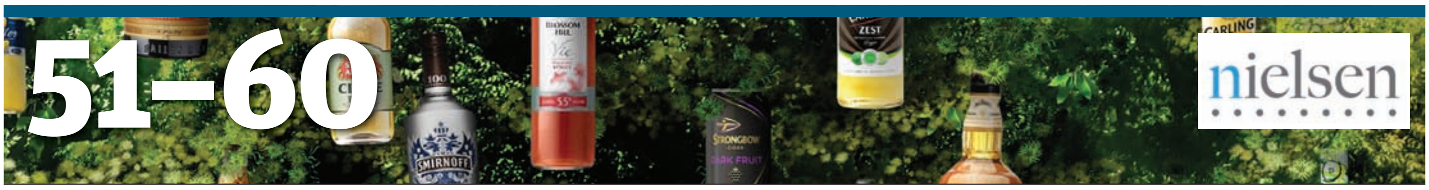
3 parts Prosecco

2 parts Aperol

1 part soda

over ice and a slice of orange

Join us on facebook.com/ukaperolspritz



54 (61)

Old Speckled Hen

SALES: £42.3m **CHANGE:** 10.7%

Greene King has been as cunning as Old Hen's foxy mascot when it comes to developing the brand.

Not so long ago it comprised just Old Speckled Hen, but the introduction of brand extensions Old Golden Hen and Old Crafty Hen have helped broaden the appeal of the brand to existing and new customers.

In the past year, sales of the newcomers have doubled from £3m to £6m, contributing to brand growth of almost 11% to £42.3m.

The brand has also benefited from heavyweight media support. In its annual report in April, Greene King said it had backed its beers with a £4.5m national TV campaign, with the company claiming it was responsible for 45% of all ale media spend during the year.

There has also been impactful in-store activity, says sales director Neil Jardine. "The latest example of this is the Father's Day activity we ran last month, which gave the brand significant off-shelf support through bespoke display units, in addition to loyalty card rewards," he says, adding that the push had attracted incremental spend to the premium ale category.

"Old Speckled Hen's success is down to a number of factors, continued Jardine, "but first and foremost it is driven by the quality of the beer itself."

51 (43)

Oyster Bay

SALES: £45.2m **GROWTH:** –16.3%

Sales of New Zealand wines are up 12%, but this Delegat-owned brand is in decline for the third year running, and was overtaken by Tesco exclusive Wairau Cove as the leading Kiwi wine brand by volume.

52 (50)

Lambrini

SALES: £44.9m **GROWTH:** –4.8%

A 4% abv cherry & apple cider, and brighter bottle designs in time for the summer, is how Halewood plans to breathe life back into this perry. The brand also sponsored ITV's British Soap Awards in May.

53 (48)

Banrock Station

SALES: £44.4m **GROWTH:** –8.7%

Accolade is pinning its hopes on Banrock Light, a 5.5% abv blend of Chardonnay and sauvignon blanc at just 60 calories per 125ml glass. A new look and marketing campaign will also feature from the autumn.

55 (63)

Campo Viejo

SALES: £41.2m **GROWTH:** 17.5%

Revamped packaging and a wine and food festival at London's Southbank Centre helped build on Campo Viejo's success. A Garnacha 2012 will go on sale in September in Burgundy shaped bottles.

56 (57)

Canti

SALES: £40.3m **GROWTH:** –2.4%

Sales slipped despite continued marketing activity and new packaging across Prosecco and Asti. Value sales of still wine fell 16%, offset by triple-digit growth from sparkling, albeit from a smaller base.

57 (87)

Barefoot

SALES: £40.0m **GROWTH:** 58.6%

Six years after launching in the UK it seems Barefoot can't put a foot wrong. Ben Fogle is supporting the Californian brand's Barefoot Wine Beach Rescue campaign, and Barefoot Pink Moscato is the latest NPD.

58 (60)

Frosty Jack's

SALES: £39.8m **GROWTH:** 0.1%

The slight growth in value masks a sharp fall in volumes. The cider is being frozen out of a number of high streets thanks to crackdowns on high-strength products. It is doing well in cans though, says Aston Manor.

59 (51)

Teacher's

SALES: £38.1m **GROWTH:** –19.0%

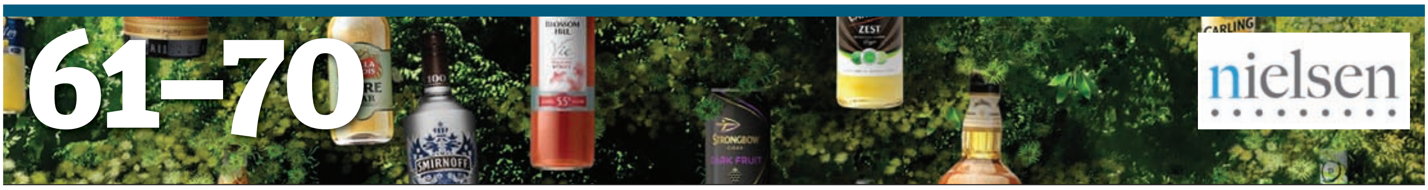
The number three Scotch whisky in the UK, brand owner Beam has introduced variants including a 25-year-old, a 50-year-old, Single Malt and Origin to offset disappointing sales.

60 (64)

Moët & Chandon

SALES: £37.5m **GROWTH:** 9.6%

The Grand Marque's brand equity helped Moët buck the trend that has seen Champagne lose share to cheaper and lighter prosecco. Moet said growth came from targeted initiatives with retailers.



61 (66)

Freixenet

SALES: £36.8m **GROWTH:** 16.9%

Prosecco might have stolen its thunder but Spanish cava retains the lion's share of sparkling wine sales in the UK – and Freixenet dominates the category.

Value sales of its sparkling portfolio, led by Cordon Negro Brut, rose 16.6% on volumes up 24% – although heavy promotion saw the average price tumble nearly 5.7% [BrandView.com].

TV and outdoor advertising has been quiet, as the brand concentrated on sponsorship promoted via social media. Although vintage festival Freixenet Scarlett Ballroom, was cancelled due to the rain, the brand sponsored literary events at the Hay Festival in May, and plans to take part in The Three Wine Men events again. "Wine fairs have played a key role in driving growth of the broader group portfolio, which includes still wines," MD Damian Clarke said. This must have worked, as still wines grew 82.9% off volumes up 64%, despite falling promotional activity leading to an 11.7% increase in average price over the year.

The brand wants to boost distribution of the less well-established Ora range and is also adding new sweet sparkling variants of its Mia range – Fresh & Crisp, exclusive to Asda since May, and Moscato, to help shoppers reappraise sparkling wine.

62 (59)

Oxford Landing

SALES: £35.6m **GROWTH:** −12.4%

An outlandish sponsorship deal with TfL to rename Oxford Circus tube station 'Oxford Landing' didn't quite land last year, and a poster campaign across the Tube and railway network failed to make up for it.

63 (35)

Ogio

SALES: £35.5m **GROWTH:** −48.0%

Tesco's lauded retailer exclusive has crashed, as promo activity fell from 50 to 35 weeks [BrandView.com 52 w/e 28 April 2013] and deal depth declined (albeit marginally). Will a new spumante add much to the mix?

64 (74)

Calvet

SALES: £35.3m **GROWTH:** 19.3%

New listings for Bordeaux chateaux wines have led to good growth for Calvet, which can now boast a haul of more than 50 international medals for its Reserve range of vintage wines.

65 (68)

Dino

SALES: £34.9m **GROWTH:** 13.2%

Ongoing discounts and exclusive online offers have resulted in continuing growth for Tesco's five-strong Italian Dino range. The brand has an rsp of £9.99 but is regularly sold at half price.

66 (121)

Yellow Tail

SALES: £34.4m **GROWTH:** 115.1%

Yellow Tail is hot-footing it up the rankings. Distributor Percy Fox launched the brand's biggest ad campaign ever – Colourful Thinkers Join Us – in October. NPD includes a Pink Moscato arriving in August.

67 (69)

Southern Comfort

SALES: £33.6m **GROWTH:** 8.8%

Southern Comfort is seeing the benefits of brand extensions Bold Black Cherry and Southern Comfort Lime. Bacardi Brown-Forman Brands says a GFK survey shows 74% of Lime drinkers are new to the brand.

68 (73)

Brancott Estate

SALES: £33.5m **GROWTH:** 13.1%

Activity on Marlborough Sauvignon Blanc has seen the varietal do particularly well, says Pernod, while the new extra-premium Chosen Rows cast a "halo effect". There's a big push and NPD this autumn.

69 (113)

Coors Light

SALES: £33.4m **GROWTH:** 85.5%

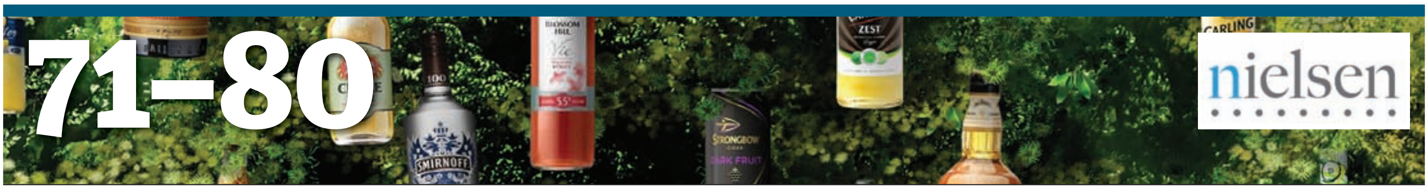
Boosted by the Closest to Cold ad campaign featuring Jean-Claude Van Damme, Coors Light's cold activation technology now tells consumers when the beer is cold – or 'super cold' – enough to drink.

70 (72)

Pimm's

SALES: £33.1m **GROWTH:** 10.2%

Despite last year's washout summer, Pimm's took full advantage of the calendar of summer events – particularly the Jubilee. This summer sees its first special edition variant, Blackberry & Elderflower.



71 (95)
Bombay Sapphire

SALES: £32.1m **GROWTH:** 40.0%

A strong year of growth for the off-trade's second best-selling gin brand, boosted by increased investment around the launch in summer 2012 of the 'ultimate G&T' campaign.

Bombay Sapphire has benefited from increased consumer interest in both authentic gins and classic cocktails. Support by Bacardi Brown-Forman Brands has focused on authenticity, mixability and the flavour and provenance of botanicals from around the world.

A cross-promotional campaign for a range of Bacardi Brown-Forman Brands across the Jubilee and Olympic summer of 2012 included neck collars on bottles in multiples and c-stores offering two free limited-edition branded glasses. The approach was repeated this year with redeemable neck collars offering balloon glassware in the big four.

Promotions in the past year have also included a link-up with upmarket mixer Fever-Tree with the brand featured on packs of Fever-Tree Tonic Water in Waitrose, Sainsbury's and Tesco, alongside two other premium gins – Sipsmith and William Grant's.

2013 marks the second year of the Bombay Sapphire World's Most Imaginative Bartender Competition, and the brand also sponsors the Imagination film competition.

72 (90)
Vina Maipo (Vina Maipo)

SALES: £31.5m **GROWTH:** 27.1%

Growing sales of the premium Chilean wine brand Vina Maipo saw it rise nearly 20 places, with strong growth in value sales of its still range offsetting the decline of a low-alcohol variant, which fell 78.6% in value.

73 (80)
Black Tower

SALES: £31.1m **GROWTH:** 10.7%

German wine has lost favour in recent years, but Black Tower has moved with the times. Its low-alcohol wines and small bottles are right on trend and it has modernised its packaging with a bright floral sleeve.

74 (92)
Villa Maria

SALES: £30.7m **GROWTH:** 27.4%

New Zealand's popularity shows no sign of waning if Torres' Villa Maria is anything to go by. It celebrated its 50th anniversary in 2012 with a return to sales growth, boosted by below-the-line activity.

75 (94)
Absolut

SALES: £30.0m **GROWTH:** 25%

Booming Absolut made a splash with the roll-out of Unique limited-edition bottles featuring one-off colour patterns earlier this year, while Absolut Mango has secured listings in 50 Tesco stores in affluent areas.

76 (89)
Wairau Cove

SALES: £29.5m **GROWTH:** 19.1%

Although 2012 was another good year for this Tesco exclusive Marlborough sauvignon blanc, with volumes up 13%, growth slowed from the 47% of last year as the average price rose 5.6%.

77 (53)
Namaqua

SALES: £29.0m **GROWTH:** –33.7%

Putting its Shiraz Cabernet Sauvignon and Chenin Blanc Sauvignon Blanc blends in 100,000 'revolutionary' Tetra Pak cartons has not led to a revolutionary performance for Namaqua Wines.

78 (67)
Glenfiddich

SALES: £28.5m **GROWTH:** –8.8%

Glenfiddich's global sales now exceed one million cases a year. A 29-year-old limited edition will be released this year to mark the race by #Team Glenfiddich to the South Pole for Walking With The Wounded.

79 (62)
Arniston Bay

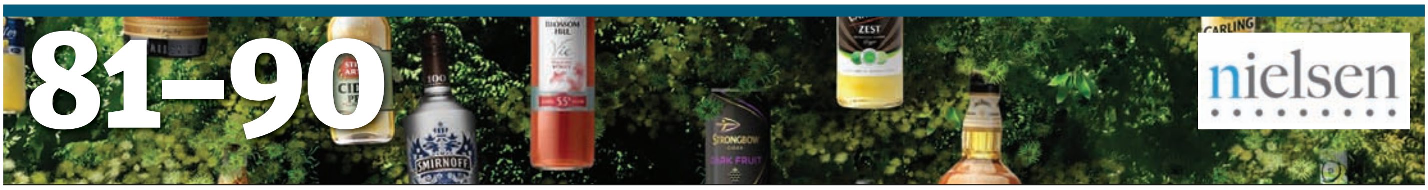
SALES: £27.9m **GROWTH:** –22.5%

After years of strong growth, volume sales of beach-themed brand Arniston Bay fell nearly a third although a new low-abv range and easy-pour 1.5-litre 'reef pouches' in Asda may boost summer sales.

80 (81)
Malibu

SALES: £27.8m **GROWTH:** 0.9%

After a strong showing last year, Malibu sales were less spectacular this time. Pernod Ricard revamped its classic white bottle in March with a new logo and shape and there's a 70cl bottle for the summer.



85 (71)
Crabbie's

SALES: £25.9m **GROWTH:** −14.4%

The past year has seen the first reversal of Crabbie's strong growth since the alcoholic ginger beer's emergence four years ago. It's been caused by increased competition both from new rivals as well as wider activity in the fruit cider category.

In response, in May Halewood launched two new Crabbie's flavours, Raspberry and Strawberry & Lime, which have joined Original and Spiced Orange.

Richard Clark, director of innovation at Halewood, says: "Consumers were saying they'd like to enjoy Crabbie's on different occasions and with different styles, and felt the brand had scope. During NPD trials, 63% of consumers said they would definitely purchase Crabbie's Raspberry as a refreshing alternative to the taste profile offered by ciders, with 94% stating they would consider purchasing it.

"The consumers and the trade have been very supportive, encouraging the brand to be enjoyed throughout the year in all seasons, and also at different times of the day."

Ad support for the 'spiffing' brand included a national radio campaign during March, with TV ads for the new flavours in May. Crabbie's also continued to sponsor the National Television Awards on ITV.

81 (103)
Cobra

SALES: £27.2m **GROWTH:** 28.2%

Cobra has flourished under the joint venture between Molson Coors and Lord Bilimoria to take it beyond its roots in Indian restaurants. The successful Cobra Train ad campaign was supported by a brand redesign.

82 (86)
Chekov Imperial

SALES: £26.7m **GROWTH:** 5.5%

Although it failed to reach the heady heights of last year, when it posted growth of 15%, Booker's own-label vodka brand posted solid value sales growth despite flat volumes following a modest price hike.

83 (88)
Disaronno

SALES: £26.1m **GROWTH:** 4.5%

TV ads directed by Roman Coppola helped Disaronno establish itself firmly in the top 100 this year. Next on the to-do list for First Drinks is a push to win more distribution in the convenience channel.

84 (84)
Harvey's

SALES: £26.1m **GROWTH:** −1.4%

It has been a quiet year for Harvey's but decline has slowed. As a Royal Warrant holder, the main event this year is the Coronation Festival where it distributed samples, and a limited-edition bottle.

86 (58)
Turner Road

SALES: £25.8.m **GROWTH:** −36.8%

Going from strong growth to fairly steep decline, Californian wine Turner Road plans to broaden the US range with new blends at everyday low prices and use aggressive promotions on its core and reserve ranges.

87 (146)
Lion's Gate

SALES: £25.7m **GROWTH:** 2428.9%

Amazing growth has seen this easy drinking South African Tesco exclusive shoot up 60 places. The new range – in rosé, red and dry white – also rolled into 3-litre boxes in May, backed by heavy promotional activity.

88 (77)
Vina Albali

SALES: £24.9m **GROWTH:** −14%

New labels are how Vina Albali hopes to reverse its fortunes. The colour of the foil on the Tempranillo, Verdejo and Rosado Tempranillo now corresponds to the colour of the wine and the labels are lighter.

89 (97)
Lanson

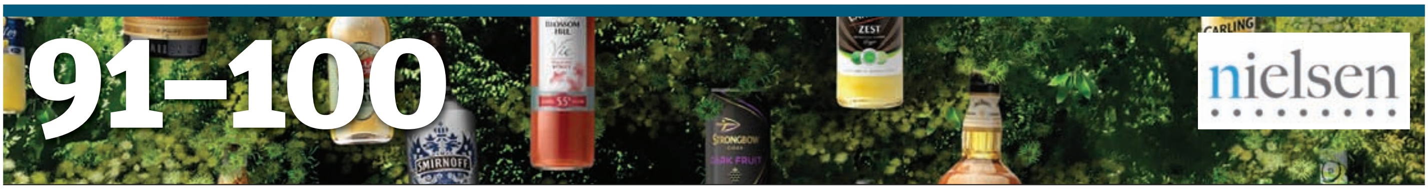
SALES: £24.8m **GROWTH:** 9.7%

Its non-malo style makes it perfect for "creating occasions", or complementing them, as in 2012's patriotic Union flag neoprene jackets – reincarnated as polo shirts to celebrate 25 years at Wimbledon.

90 (75)
Tennent's Super

SALES: £23.9m **GROWTH:** −18.8%

An average price decline of 12.4% was maybe not what the government had in mind when it hatched its minimum unit pricing plans but AB InBev hasn't been able to stop volumes dipping (by 7.3%).



91–100

96 (112)
Jägermeister

SALES: £22.6m **GROWTH:** 23.5%

Launched in the UK in 2005. another year of concerted sales growth sees Jägermeister join the ranks of the off-trade's top 100 alcohol brands.

Off the back of a strong presence for the German liqueur on the UK festival circuit last summer, distributor Cellar Trends launched the brand's biggest-ever campaign in November 2012, built around the strapline 'It Runs Deep', with a second burst of activity in February and March this year.

UK group marketing manager Nicole Goodwin says 'It Runs Deep' "represents Jägermeister's role as a drink that brings true friends together. It is no cheap shot for shallow friends ... but a toast to bonds that are deep, meaningful and true."

Marketing activity also includes the Jägermeister Music Programme, which supports signed and unsigned British bands touring venues throughout the UK.

The brand remains strongest in the on-trade, where it has been pushing to expand its appeal beyond the popular 'bomb' serve (which sees a shot glass of Jägermeister dropped into a glass of energy drink). This has included a drive to promote an ice cold shot as a signature serve, with a bespoke Jägermeister Tap Machine dispensing a shot at minus 18C.

91 (137)
Gran Familia

SALES: £23.8m **GROWTH:** 108.2%

Tesco rolled out new mid-tier varieties under the Gran Familia brand last spring. Since then, boosted by steady price promo activity, it has been creeping up the list, helped by Spanish wine's overall growth.

92 (79)
Smirnoff Ice

SALES: £23.7m **GROWTH:** –16.8%

The price per litre went up 4% and volumes fell off a cliff (though at least this year's fall wasn't as bad as the previous year's). Smirnoff Ice is suffering from the general alcopops malaise. Time for a rethink?

93 (96)
Veuve Clicquot

SALES: £23.1m **GROWTH:** 2.2%

Re-entering the top 100, the widow has seen off retailer exclusives and managed to hang on to her position as a top three Champagne, despite only marginal value growth and no movement on volume.

94 (78)
Boddingtons Draught

SALES: £23.1m **GROWTH:** –19.3%

The revolution sweeping the craft ale sector has not had a halo effect on some of the more traditional ale brands such as Boddies. Volume sales fell by more than a quarter as drinkers favoured trendy micro-brewers.

95 (101)
Jameson

SALES: £22.9m **GROWTH:** 7.5%

The world's bestselling Irish whiskey, Jameson is a strategic premium brand for Pernod Ricard, now exceeding four million cases a year. Gift packs feature strongly in current off-trade marketing.

97 (106)
Westons

SALES: £22.1m **GROWTH:** 10.5%

Family-owned Westons' best-selling cider is Henry Westons Vintage, which sponsors the Cheltenham Jazz and Literature Festivals. A pack redesign for Organic Wyld Wood has improved rate of sale.

98 (91)
Holsten Pils

SALES: £21.8m **GROWTH:** –11.7%

Owned by Carlsberg UK, Holsten Pils emphasises its Hamburg heritage. Marketing support focuses on the 4% abv Holsten Vier, sponsor of the Lakeside World Professional Darts Championships.

99 (65)
Stowells

SALES: £21.8m **GROWTH:** –33.6%

Number one in the on-trade, Stowells' stock fell for a second year in retail – with volumes down 41% – but new low-alcohol variants rose 143.6% by value and 193% by volume. It's now focusing on indies.

100 (93)
Wines from France

SALES: £21.6m **GROWTH:** –10.4%

Time has now been called on Tesco's exclusive French house range – according to Tesco, the range of classic varietals has been "run down" prior to being removed from shelves at the end of July.

ones to watch

125 (125)
Thatchers
SALES: £16m **GROWTH:** 7.6%

As ciders go, Thatchers has been a modest performer in the off-trade, but earlier this year revealed its ambitions to secure a top five position in retail. With Thatcher's Gold already the on-trade's second-bestselling draught cider, it may well be up to the task – and isn't afraid to put its money where its mouth is. The family-run business based in Sandford, Somerset, kicked off a £4m marketing push this Easter that included TV advertising on ITV, C4 and Channel 5, and was supported with outdoor and press advertising, plus social media activity.

142 (147)
Viñedos de España
SALES: £13.8m **GROWTH:** 1,901.6%

Following its launch last March, value sales of this entry-level Spanish range, sold through Tesco, have grown from £0.7m to £13.7m. With fewer wines retailing below £5, this may be one to watch.

118 (140)
Rekorderlig
SALES: £17.9m **GROWTH:** 118.1%

As well as a £4m marketing budget – featuring a first outdoor ad campaign, limited-edition flavours including Passionfruit and Winter Cider are in place to extend growth beyond the summer peak.

109 (131)
Mont Pierre
SALES: £19.2m **GROWTH:** 40.2%

Sainsbury's sells four varieties of this wine: sauvignon blanc, fitou, shiraz and shiraz rosé. The brand's strong growth came before the arrival of 2,250ml bag-in-box Chardonnay and Cabernet sauvignon in June.

146 (139)
Bollinger
SALES: £13.2m **GROWTH:** 30.7%

While Eddy and Patsy might not be around to boost Bolly these days, the brand has been resilient to recessionary pressures – despite being the most expensive Champagne brand in the top 150 at £44.

124 (133)
Hobgoblin
SALES: £16.4m **GROWTH:** 27.8%

As well as appealing to Lord of the Ring fans, Marston's Wychwood Brewery Hobgoblin achieved notoriety (and extra publicity) as the 'face' of a successful campaign against the Chancellor's duty escalator.

113 (123)
Tyskie
SALES: £18.7m **GROWTH:** 23.1%

Part of SABMiller's world lagers portfolio, but while the 5.6% abv lager might appeal to the wider premium market, return flight promos to Polish destinations make it clear who the real target market is.

133 (134)
Tiger
SALES: £15.1m **GROWTH:** 18.5%

Tiger's status as the biggest-selling beer in Asia is highlighted in the UK through the Hidden Depths ad campaign, which promotes the Heineken-owned lager's Far Eastern provenance.

102 (110)
Vladivar
SALES: £21.0m **GROWTH:** 13.3%

Still remembered as the "Wodka from Varrington" in 80s TV ads, Vladivar has prospered despite less marketing. Diageo has taken a stake in the United Spirits business, but has yet to provide plans for Vladivar.

106 (111)
Glenmorangie
SALES: £20.0m **GROWTH:** 8.4%

Single malt Glenmorangie is owned by the Moët Hennessy wines and spirits division of luxury brands business LVHM. A top-of-the-range Signet malt is available in 23 Sainsbury's stores with a RSP of £119.