



# GENERATION

Daniel Woolfson

Millennial moderation seems to be the order of the day, inspiring a raft of ‘NoLo’ booze launches. But that doesn’t account for the extra 136 million litres of alcohol sold in the past year. So what’s behind the rise in sales? And has the concept of a strait-laced generation been overhyped?

**I**t’s the year of the snowflake! The catch-all sneer has become tabloid shorthand for a younger generation that seemingly just can’t take a joke. Or handle a pint, if you believe all the rhetoric around moderation.

Indeed, the tidal wave of low and non-alcoholic drinks hitting the market suggests ‘moderation’ is the new black. Their stellar growth – Heineken 0.0 has more than doubled its value to £9.8m [Nielsen 52 w/e 20 April 2019] – only serves as further proof.

With all this talk of generation sensible, you could be forgiven for assuming the drinks industry was struggling. Except it is, in fact, booming: the UK’s 100 bestselling booze





# IN SENSIBLE?

brands have added a combined £752.4m in sales this year, raking in a total of £10.2bn. That's an extra 136 million litres of booze this year alone. And of those top 100 brands 67 are in growth, many making double-digit (or even triple-digit) gains. It hardly seems a sign of moderate consumption.

## Reality check

So why are we constantly being told Brits are packing in their drinking? How are we supposedly taking a healthier, less all-guns-blazing approach to alcohol consumption while splashing millions of extra pounds on booze?

Admittedly, last year did benefit from some unusually favourable conditions.

There is obviously the matter of the World Cup. England's shock success in getting to the semi-final skews this year's figures, especially for beer brands like Stella, which racked up an additional £6.7m over the tournament. Or Heineken, which pulled in the largest gain of any beer in our top 100 ranking. That the summer of 2018 was one of the hottest on record helped too.

This year could prove a reality check. Indeed, Pernod Ricard commercial director Chris Ellis says brands that benefited from the football and sunshine-heavy 2018 will likely struggle when it comes to next year's comparative results. Especially given the miserable rainy spell that blighted this June.

But last year's boom in booze sales is far more than just a blip. The industry is "vibrant and buoyant" as a whole, stresses Ellis. And he's not the only drinks boss talking about "reasons to be cheerful" for BWS.

Premiumisation is one such reason. Even if shoppers are drinking less in terms of quantity, that doesn't mean values have to fall. 'Less but better' has become the norm, with shoppers demonstrating – despite plummeting consumer confidence and the threat of economic shock from Brexit – that they're still willing to splash out an extra few quid on quality. Which explains why Yellow Tail and Barefoot are the biggest winners in wine in this year's ranking, having positioned ↻



# britain's biggest alcohol brands



## BRITAIN'S BIGGEST ALCOHOL BRANDS

RANK	BRAND	SALES	CHANGE	
			(£m)	%
1 → 0	<b>Stella Artois</b>	<b>573.4</b>	7.6	<b>40.3</b>
2 → 0	<b>Smirnoff</b>	<b>494.5</b>	1.9	<b>9.1</b>
3 → 0	<b>Budweiser</b>	<b>462.2</b>	10.5	<b>43.8</b>
4 ↑ 2	<b>Gordon's</b>	<b>433.0</b>	56.6	<b>156.6</b>
5 → 1	<b>Foster's</b>	<b>363.0</b>	2.5	<b>8.8</b>
6 ↓ 1	<b>Carling</b>	<b>324.1</b>	-7.5	<b>-26.1</b>
7 ↑ 1	<b>Strongbow</b>	<b>311.3</b>	16.7	<b>44.4</b>
8 ↓ 1	<b>Hardys</b>	<b>276.3</b>	1.8	<b>5.0</b>
9 → 0	<b>Jack Daniel's</b>	<b>244.7</b>	-0.6	<b>-1.4</b>
10 → 0	<b>Famous Grouse</b>	<b>216.7</b>	0.2	<b>0.4</b>
11 → 0	<b>Carlsberg</b>	<b>188.5</b>	2.5	<b>4.6</b>
12 ↑ 2	<b>Barefoot</b>	<b>180.6</b>	19.0	<b>28.8</b>
13 ↑ 2	<b>Kopparberg</b>	<b>164.4</b>	8.5	<b>12.8</b>
14 ↑ 2	<b>McGuigan</b>	<b>163.7</b>	10.9	<b>16.1</b>
15 ↑ 3	<b>Corona</b>	<b>160.7</b>	15.4	<b>21.5</b>
16 ↑ 11	<b>Yellow Tail</b>	<b>150.1</b>	26.4	<b>31.3</b>
17 ↑ 3	<b>Peroni</b>	<b>147.4</b>	9.6	<b>12.9</b>
18 ↓ 6	<b>Echo Falls</b>	<b>146.4</b>	-11.1	<b>-18.3</b>
19 → 0	<b>Glen's</b>	<b>142.9</b>	4.6	<b>6.3</b>
20 ↓ 7	<b>Blossom Hill</b>	<b>141.8</b>	-9.5	<b>-14.9</b>
21 ↑ 5	<b>San Miguel</b>	<b>140.6</b>	17.7	<b>21.1</b>
22 ↑ 1	<b>Casillero del Diablo</b>	<b>135.6</b>	7.3	<b>9.2</b>
23 ↓ 1	<b>Kronenbourg</b>	<b>135.5</b>	6.2	<b>7.9</b>
24 ↑ 1	<b>Baileys</b>	<b>133.2</b>	10.6	<b>12.7</b>
25 ↓ 4	<b>Russian Standard</b>	<b>132.3</b>	1.5	<b>2.0</b>
26 ↓ 9	<b>Bell's</b>	<b>129.2</b>	-9.3	<b>-13.3</b>
27 ↓ 3	<b>Captain Morgan</b>	<b>126.5</b>	2.7	<b>3.4</b>
28 ↑ 14	<b>Heineken</b>	<b>124.6</b>	77.1	<b>54.2</b>
29 ↓ 1	<b>Bacardi</b>	<b>111.0</b>	-0.4	<b>-0.4</b>
30 ↑ 1	<b>Guinness</b>	<b>106.5</b>	4.4	<b>4.5</b>
31 ↑ 2	<b>Isla Negra</b>	<b>105.1</b>	9.7	<b>9.3</b>
32 ↓ 2	<b>Campo Viejo</b>	<b>98.3</b>	-3.8	<b>-3.8</b>
33 ↓ 4	<b>Gallo Family Vineyards</b>	<b>96.6</b>	-8.1	<b>-8.5</b>
34 ↓ 2	<b>Coors</b>	<b>94.8</b>	-4.9	<b>-4.8</b>
35 ↑ 8	<b>I Heart</b>	<b>93.9</b>	37.0	<b>25.4</b>
36 ↓ 2	<b>Bombay</b>	<b>93.6</b>	3.2	<b>2.9</b>
37 ↑ 3	<b>BrewDog</b>	<b>86.2</b>	21.2	<b>15.1</b>
38 ↑ 8	<b>Thatchers</b>	<b>81.1</b>	25.9	<b>16.7</b>
39 ↓ 2	<b>Wolf Blass</b>	<b>80.5</b>	0.0	<b>-0.0</b>
40 ↑ 41	<b>Birra Moretti</b>	<b>73.5</b>	118.7	<b>39.9</b>
41 ↑ 11	<b>Tennent's</b>	<b>72.9</b>	27.3	<b>15.6</b>
42 ↓ 4	<b>Grant's</b>	<b>72.4</b>	-5.0	<b>-3.8</b>
43 ↑ 79	<b>Whitley Neill</b>	<b>71.3</b>	309.3	<b>53.9</b>
44 ↑ 12	<b>Tanqueray</b>	<b>70.9</b>	40.7	<b>20.5</b>
45 ↓ 9	<b>Beck's</b>	<b>70.4</b>	-13.2	<b>-10.7</b>
46 ↑ 5	<b>Absolut</b>	<b>66.3</b>	14.4	<b>8.4</b>
47 ↓ 8	<b>Villa Maria</b>	<b>65.6</b>	-12.8	<b>-9.6</b>
48 ↓ 4	<b>Courvoisier</b>	<b>65.6</b>	1.1	<b>0.7</b>
49 ↓ 8	<b>Whyte &amp; Mackay</b>	<b>65.5</b>	-7.5	<b>-5.3</b>
50 ↓ 3	<b>Lindeman's</b>	<b>65.4</b>	2.0	<b>1.3</b>

**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. 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 20 April 2019. Note: This year, sales figures include all variants for total brand – ie Stella Artois includes lager and cider; Smirnoff includes vodka and RTDs. Copyright: Report compiled by Nielsen, exclusively for The Grocer/William Reed Business Media. No reproduction in full or in part for commercial purposes is permitted without prior consent of Nielsen.

↳ themselves as just a little bit above the likes of Hardys and Blossom Hill. Or why Birra Moretti has more than doubled its value despite costing a wallet-busting £3.06 on average per litre.

Still, it's not all about people buying less but better. There is the small matter of an extra 136 million litres in sales to square. William Grant & Sons UK & Ireland MD Neil Barker believes consumers are not cutting back as much as headlines suggest. "Yes, people are much more aware [about wellness] but that doesn't mean they're not consuming alcohol," he argues.

Indeed, an exclusive poll for The Grocer by Harris Interactive suggests young consumers are still knocking back the booze. More than six in 10 of the 18 to 34-year-old age group drinks alcohol once a week or more, found

### Who's up?

**43** (122) **Whitley Neill** ↑ **309.3%**

**40** (81) **Birra Moretti** ↑ **118.7%**

**74** (103) **Amstel** ↑ **70.8%**

**83** (99) **Hop House 13** ↑ **44.2%**

**71** (86) **Buckfast** ↑ **29.8%**

the poll of more than 1,000 consumers. That's marginally higher than the supposedly wine-swilling over-55 age group, of which 59% fell into this bracket.

The difference is that younger consumers are changing what they do drink. Not only are they gravitating towards more premium lines, they are also demanding a higher level of innovation. Nearly four in 10 of the 18 to 34-year-olds in our poll said they liked to try out different drinks and flavours, compared with just 12% of the 55-plus age group.

"There is a real willingness from consumers to experiment and try new innovation more than they have in the past," says Barker. Concha y Toro's UK general manager Simon Doyle also believes "there is much more of an appetite to do new things and find new points of difference".

Diageo has shown how powerful a new flavour can be. Gordon's Pink, launched not even two years ago, is almost single-handedly responsible for the gin brand's tremendous success (it's the fastest-growing brand in this report). There are plenty more examples where that came from. ↻



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\*Nielsen, Total Market 52w 18.05.19  
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# britain's biggest alcohol brands



## BRITAIN'S BIGGEST ALCOHOL BRANDS

RANK		BRAND	SALES	CHANGE	
up/down			(£m)	%	£m
51	↓ 6	John Smith's	64.1	-0.6	-0.4
52	↓ 3	Brancott Estate	63.1	4.0	2.4
53	↑ 5	Desperados	60.0	30.7	14.1
54	↑ 11	Estrella Damm	58.7	48.1	19.1
55	↑ 2	Oyster Bay	57.7	19.6	9.5
56	↓ 2	Magners	57.3	9.0	4.7
57	↓ 7	'Hen'	56.7	-4.4	-2.6
58	↓ 5	Three Barrels	56.3	1.0	0.6
59	↓ 4	Henry Westons	55.7	9.1	4.7
60	↑ 6	Freixenet	55.1	43.9	16.8
61	↓ 13	Kumala	54.8	-12.9	-8.1
62	↓ 27	Jacob's Creek	51.5	-42.2	-37.5
63	↓ 2	Greenall's	47.9	8.6	3.8
64	↓ 2	Oxford Landing	47.0	10.8	4.6
65	↑ 4	Jameson	45.7	23.5	8.7
66	↓ 6	Jim Beam	45.0	1.8	0.8
67	↑ 4	Trivento	43.5	20.1	7.3
68	↓ 4	Lambrini	41.7	5.1	2.0
69	↓ 2	Canti	41.2	8.3	3.2
70	↓ 11	Moët & Chandon	39.9	-10.4	-4.6
71	↑ 15	Buckfast	39.4	29.8	9.0
72	↓ 4	WKD	38.9	5.1	1.9
73	↓ 10	Rekorderlig	38.0	-4.5	-1.8
74	↑ 29	Amstel	37.5	70.8	15.6
75	→ 0	Pimm's	36.1	2.2	0.8
76	↑ 3	Chekov	36.0	6.0	2.0
77	↓ 5	Calvet	35.3	-2.1	-0.7
78	↓ 1	Malibu	34.6	0.7	0.2
79	↓ 5	Tyskie	34.5	-3.1	-1.1
80	↓ 2	Hobgoblin	33.8	-1.3	-0.4
81	↓ 5	Bulmers	33.6	-2.9	-1.0
82	↑ 8	Sharp's	33.5	20.1	5.6
83	↑ 16	Hop House 13	33.4	44.2	10.2
84	↓ 4	Southern Comfort	33.2	-2.3	-0.8
85	↓ 15	Martini	32.3	-12.0	-4.4
86	↑ 15	Mud House	31.2	36.4	8.3
87	↑ 6	The Ned	30.8	18.3	4.8
88	↓ 15	Cobra	30.6	-14.5	-5.2
89	→ 0	Glenfiddich	30.6	4.8	1.4
90	↓ 8	Disaronno	30.1	-8.2	-2.7
91	↓ 4	Torres	30.1	-0.6	-0.2
92	↓ 8	Veuve Clicquot	28.8	-6.0	-1.8
93	↓ 8	Frosty Jack's	28.7	-6.0	-1.8
94	↓ 6	Lanson	27.5	-7.1	-2.1
95	↑ 2	Cono Sur	27.3	14.4	3.4
96	↑ 10	Old Mout Cider	27.1	33.5	6.8
97	↓ 14	Holsten Pils	26.8	-15.1	-4.8
98	↓ 2	Greene King	26.3	9.3	2.3
99	↑ 12	Staropramen	26.0	32.5	6.4
100	↑ 15	Edinburgh Gin	26.0	39.3	7.3

**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. 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 20 April 2019. Note: This year, sales figures include all variants for total brand – ie Stella Artois includes lager and cider; Smirnoff includes vodka and RTDs. Copyright: Report compiled by Nielsen, exclusively for The Grocer/William Reed Business Media. No reproduction in full or in part for commercial purposes is permitted without prior consent of Nielsen.

↻ Whitley Neill became the second-biggest gin brand this year thanks to its innovative Rhubarb & Ginger and Parma Violet lines. And Baileys has sold a whopping £11.9m of its new Strawberries & Cream line since launching last May.

Admittedly, some of the NPD turning heads is the kind that appeals to the moderation trend. Recent innovation from the big boys of booze has come with less of a kick. Diageo, for instance, is throwing its weight behind a new 30% abv Ketel One 'Botanical Vodka' range and has taken Smirnoff into lower-alcohol with its Infusions range.

There does seem to be demand for this type of fare. Pernod Ricard's Ellis confirms "conversations with customers have changed" and "they're almost pushing us" to create lower-abv products.

### Who's down?

62 (35)  
**Jacob's Creek** ↓ 42.2%

85 (70)  
**Martini** ↓ 12.0%

88 (73)  
**Cobra** ↓ 14.5%

97 (83)  
**Holsten Pils** ↓ 15.1%

61 (48)  
**Kumala** ↓ 12.9%

That has turned around previously unviable propositions like Pernod's Brancott Estate 'Flight' wines, which come naturally around the 9% mark. They returned to the market this year for the first time since 2015, to cater for drinkers looking for a lower abv.

### Spritz boom

And more light 'spritz' style RTDs have come on to the market over past months than you can count. Kopparberg, for instance, launched Balans, an 'aqua spritz' (essentially boozy sparkling water) into sleek cans early in the year. Meanwhile, Treasury Wine Estates has launched a new bottled 'Gin Fizz' for Blossom Hil. Much of this is inspired by the massive success of Aperol Spritz in the on-trade – the Campari-owned aperitif has taken pubs and bars by storm, though it's not big enough in retail to make this list.

Stuart Ekins, MD of Cask Liquid Marketing, says these longer, mixed drinks create a perception "from a dilution point of view that your alcohol intake isn't quite the same as some of the more traditional drinks".

These lower-abv drinks aren't just on ↻



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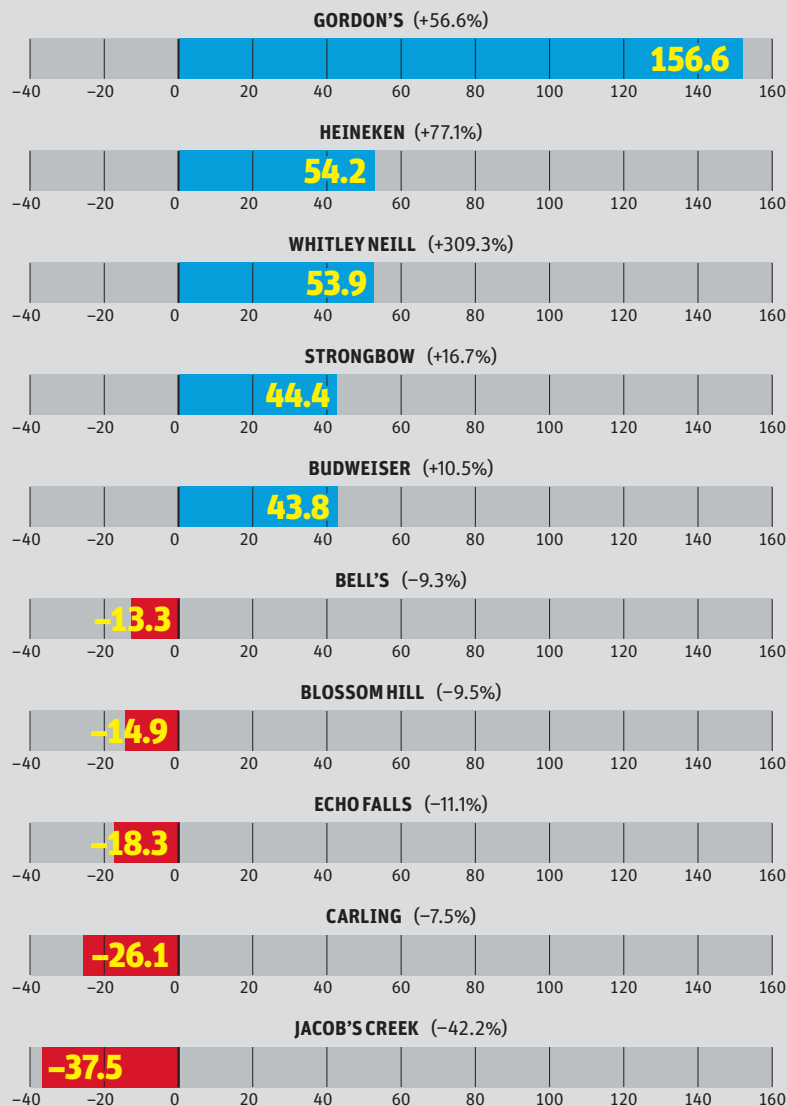
[ yellow tail ]®

\*Source: IRI MAT value total off trade still wine to 25th May 2019. Additional information: [yellow tail] is the top 5 still wine in value terms, worth £148m, +23% YOY (+£28m actual increase). All claims on varietal rankings are in value.



# britain's biggest alcohol brands

## Biggest winners & losers (£m)



## Winners & losers: the key trends

● The gin boom is once again a major influence behind the biggest booze winners. This year, it's all about new variants. Gordon's Pink was the driving force behind its gargantuan £156.6m gain, and Whitley Neill jumped 79 places in our ranking thanks to unusual variants such as Rhubarb & Ginger and Parma Violet.

● The World Cup was another factor giving brands a boost – and

beer brands especially. It drove massive gains for Heineken and the official beer of the tournament, Budweiser. Sadly the World Cup didn't deliver the same gains for Carling, the third fastest-falling brand, which suffered from mass delistings of its cider range.

● Speaking of cider, Strongbow played a blinder with its Dark Fruits variant, now worth £136.6m. It's at the forefront of the

boom in fruity ciders, which has also driven gains for Kopparberg and Old Mout.

● It's no coincidence that three of the five fastest-falling brands were wines. Affordable brands are losing ground to slightly posher plonk such as Yellow Tail and Barefoot, as consumers drink less but better.

● Blended scotch lost ground to imported whiskey, resulting in a slump for Bell's.

● trend. There's also a financial incentive: you pay less duty. Which, combined with the fact that shoppers are happy to splash out on a perceived premium experience, makes it a no-brainer. This extends into the booming low and non-alcoholic (or 'NoLo', as it's commonly dubbed) category. As a trend, it is taking the supermarkets by storm at a speed that is reminiscent of the early days of craft beer. After all, there's no duty at all with no booze.

NoLo beers are already racking up huge gains across the top 100: Heineken 0.0 has almost achieved sales of £10m since its launch. Budweiser Prohibition is approaching £3.5m. And spirits are next. Seedlip, backed by Diageo, is the market leader by a huge degree, but new entrants are steadily hitting shelves, such as Pernod Ricard's Ceder's, or William Grant & Sons' Atopia, which launched a matter of weeks ago.

But there are serious questions about the pricing of these spirits, many of which cost as much as – if not more than – alcoholic fare.

"I think a lot of it is driven by margin," says Cask Liquid's Ekins. "Everyone is amazed that there's no duty on it and they can still sell

**"I think a lot of it is driven by margin. Everyone is amazed that there's no duty on it and they can still sell a bottle for £20"**

a bottle for £20." William Grant's Barker disagrees. He says it's down to the costly nature of the innovation. "It's actually quite a difficult technological area to get to in terms of distilling something [with no alcohol] that tastes good."

Indeed, Claire Warner, MD of new brands at Seedlip, previously told *The Grocer* the NoLo beacon brand didn't need "to defend" its price point. She stressed the quality of the ingredients and the complexity of its production process.

That consumers are willing to splash out upwards of £20 on a spirit that contains no alcohol is a sign that the moderation trend is isn't a complete myth.

But as this report shows, Britain's biggest (actual) booze brands are largely in good shape. NoLo drinks have made gains, yes, but those gains are minimal compared with how the alcoholic stuff is selling. So though Brits may be cutting back a little, they are by no means turning away from alcohol any time soon. Read on for the highs and lows of this year's top 100 alcohol brands...

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\* Source: McKinsey - Western Europe's consumer-goods industry in 2030 \*\* Source: Mintel, March 2017

\*Source: One Source of Truth; Net Revenue Growth vs LY 2016, December YTP





## 1 (1) Stella Artois

**SALES:** £573.4m **GROWTH:** 7.6%  
Britain's biggest booze brand has netted the third-largest gain of any beer brand in this list, and the sixth of any brand overall: Stella Artois has added a staggering £40.3m to its value. That equates to an extra 11.9 million litres – enough beer to fill almost five Olympic swimming pools.

The brand's owner, Budweiser Brewing Group (formerly AB InBev), has spent past years transforming the perception of Stella from a cheap and nasty brew with a rather unfortunate epithet, to an upmarket world lager with sponsorships of posh sporting events like Ascot and Wimbledon. Last year saw the brand given a subtle makeover designed to play the posh cues up further.

Hence Stella has adopted a new slogan. Not a far cry from the days of 'reassuringly expensive', it's all about "encouraging consumers to live the 'joie de bière' philosophy", says Sharon Palmer, Budweiser Brewing Group's head of trade marketing.

Which, essentially, means more of the same: Wimbledon, Ascot and fancy ads.

This tried and tested strategy is hardly a new approach. And for good reason: it has seen Stella's sales increase steadily over past years. The dark days of its former moniker are well and truly over.

That the brand grew to such an extent this year is even more impressive considering the average price of Stella rose not insignificantly this year, by an average of 2.4% to approximately £2.31 per litre. Although it should be noted that, despite positioning itself

as 'premium', it's still much cheaper than the likes of Peroni (17) or Corona (15).

Admittedly Stella has had some outside help over the past 12 months. Like many of the beer brands on this list – Heineken (28), Amstel (74) and Budweiser (3) come to mind – its performance was buoyed by last summer's lengthy heatwave and the utterly unexpected longevity of England's stay in the World Cup. Indeed, Stella racked up an additional £6.7m over the 2018 World Cup period compared with the same period the prior year.

But, as the declines suffered by the likes of Carling (6), Beck's (45) and Cobra (88) show, the World Cup by no means guarantees a dividend for big beer brands.

The only question is, after such a phenomenal year, how will Stella be able to match these incredibly tough

comparables over the next 12 months?

That's not to say it was all sunshine and flowers for Stella. Firstly, it has had to deal with a change in the way shoppers are buying the brand. While Stella will always be huge for the mults, big supermarkets are not where it is strongest any more.

Instead, says Palmer, the brand's greatest success over the past 12 months has been in the impulse channel, where the brand grew £22.8m: more than half of its value gain.

Interestingly enough, the brand lost value in Morrisons, Waitrose and Tesco, its only

**“After such a phenomenal year, will Stella be able to match these comparables?”**





growth in the mults coming from Sainsbury's and Asda.

Secondly, Stella Cidre has gone from being a reputable mainstay on supermarket shelves to a footnote on the category's recent history.

Sales of its one remaining SKU (all its flavours have been discontinued) fell £4.4m to £3.6m this year – all the more remarkable when you consider there were five Stella Cidre SKUs in UK supermarkets this time in 2017, which pulled in a combined £41.4m in value sales [Nielsen 52 w/e 23 April 2017].

In terms of the future, Stella's looking at the fast-growing segments of the market. It's yet to move into alcohol-free, but July 2018 saw the launch of Stella Artois Gluten-Free, for which gluten is removed through the use of a specific protein that keeps the taste intact, according to Budweiser Brewing Group.

Admittedly, Stella Gluten-Free is small fry for the moment. At the time of its launch, the gluten-free beer category itself had only just hit £10m in sales. But Palmer says “making existing products like beer accessible to people who follow lifestyles such as gluten-free like this” is a “huge opportunity”.

The brand also renewed its #PouritForward campaign, in partnership with charity Water.org, for another year, aimed at helping provide access to clean water for people in the developing world.

In any case, Stella's dominance of the UK top booze brands looks set to continue. At least for the near future.

Given the lightning-fast rate some challengers have climbed this list – we're looking at you, here, Gordon's (4) – all bets are off when it comes to the long term.

2 (2)

## Smirnoff

**SALES:** £494.5m **GROWTH:** 1.9%

Diageo's vodka behemoth is getting more expensive. While volumes are down 1.2%, Smirnoff's average price per litre across its expansive portfolio has risen a not-inconsiderable 3.1% to £14.98, adding £9.1m to the brand's value in grocery.

Much of this is down to the 34p surge in the average price per litre of the big-hitting Red Label variant, which is relatively flat in volume sales.

That has helped to mitigate the £3.9m losses caused by massive delistings of Smirnoff's ciders. They completely disappeared from the shelves of Tesco and Waitrose last spring, while their presence was significantly reduced in Asda and Morrisons.

For growth, Smirnoff is looking to its RTDs and flavours – both of which have played “a critical role in terms of recruitment and allowing the brand to access consumption occasions where it would not

ordinarily be considered” according to Diageo.

“Smirnoff is proud to have helped pioneer the RTD category, initially through the launch of Smirnoff Ice in 1999 and more recently through premix cans” the supplier adds, going on to insist that “flavours bring excitement and experimentation to the brand, particularly with regards to making cocktails”.

And speaking of mixology, the brand this summer launched Smirnoff Infusions, a combination of vodka, real fruit essence and natural ingredients in two variants – Orange, Grapefruit & Bitters and Raspberry, Rhubarb & Vanilla.

The new spirit drink, which taps the lower abv trend at 23%, is meant to be mixed with soda “and is ideally suited to lower-tempo occasions”.

The launch is supported by a £4.4m campaign, which Diageo expects to reach 97% of the UK's adults within a year.

Also this summer, Smirnoff has rolled out an “impactful” new look for all bottles in its spirits lineup.





# A BEER FOR THE DRINKERS OF TODAY



**In a fast-moving 2019, change can be intimidating; but not for the new generation of drinkers today and not for the brewers at Maltsmiths. Understanding and embracing the fact that consumer tastes change, Maltsmiths thought it was about time lager did too - which is why it takes a decidedly 'drinker-focused' approach to brewing.**

Passionate about creating beers that meet the changing tastes of today's drinkers, Maltsmiths is a modern alternative to the lagers of yesteryears, with a mantra of 'change tastes good' at the heart of its ethos. A crisp and flavourful

lager, Maltsmiths marries citrus and earthy hoppy notes, traditionally making it the perfect gateway beer for those looking to try craft for the first time. But with the growing trend for premiumisation across the off-trade, its crisp and refreshing flavour and contemporary branding is today seeing its popularity rise amongst this new generation of drinkers who's more mindful approach to drinking means they prefer to consume less, but at a better quality.

Marrying premium credentials, with an accessible crisp and refreshing flavour profile, Maltsmiths therefore offers retailers a unique positioning in the market. Melissa

Cole, esteemed beer writer, talks about the importance of bridging the gap between world and craft: "Sign posts in store are absolutely vital, as people now often want to explore outside of their 'usual' and too many non-specialist retailers have been too quick to jump on the 'craft' bandwagon without supporting their customers learning curve at the same time. Shelf barkers, tasting notes and suggested food pairings can help customers navigate the beer aisle more successfully, and avoiding jargon words like 'hoppy' and 'malty' and instead using words like 'citrus' or 'bready' and indicating a beer's flavour intensity gives people a more comforting idea of what to expect."

**For more information on Maltsmiths, contact your HUK representative today.**



# britain's biggest alcohol brands

3 (3)

## Budweiser

**SALES:** £462.2m **GROWTH:** 10.5%

Having overtaken Foster's (5) to become the UK's third-biggest booze brand last year, Budweiser has gained £43.8m – the fifth-highest growth of any brand in this list.

As Budweiser was the official beer of the World Cup, it's no surprise the nation's second-favourite beer has smashed it right into the back of the net.

"Against a noisy backdrop, it was key to create a strategy that stood out, reaching the key audience through a variety of channels," says Budweiser Brewing Group head of trade



marketing Sharon Palmer.

Bud Light also continued on its upward trajectory to be worth £37.9m. Palmer says the lower-calorie brew is selling well among younger shoppers with "evolving alcohol preferences" – many of whom are new to the category.

5 (4)

## Foster's

**SALES:** £363.0m **GROWTH:** 2.5%

Brad and Dan are back! The Aussie characters were revived by Foster's in spring for a £6m push – its biggest spend in years. The first TV spot saw the duo take a swipe at craft beer.

But it's not hipster brews that are Foster's biggest challenge; it's Budweiser (above). Having leapfrogged Foster's last year to become the UK's second-biggest beer, Bud has extended its lead. There's now nigh-on £100m between the two brands.

That's in spite of Foster's returning to growth thanks to 2018's sunshine and footie.



"The amazing summer weather combined with England reaching the World Cup semi-final allowed our 'Sports and Seasons' driver to truly take off," says Toby Lancaster, category & shopper marketing director at owner Heineken.

6 (5)

## Carling

**SALES:** £324.1m **GROWTH:** -7.5%

What a difference a year makes. Last summer, Carling was riding high on a multimillion-pound gain. This year, a raft of delistings across the big four supermarkets has spelled a £26.1m decline for Carling, the only one of the top 10 lager brands to lose sales.

The lager may account for £7.1m of that decline, but the delisting among Carling's cider lines was the real driver of its demise. Combined, Carling Black Fruits and Apple ciders lost £16.1m following their removal from Tesco shelves in



August. Asda and Morrisons followed suit weeks later.

The brand is hoping to turn around flagging sales with the February launch of its a multimillion-pound 'Made Local' campaign, including two TV adverts that highlight the brand's local credentials.



4 (6)

## Gordon's

**SALES:** £433.0m **GROWTH:** 56.6%

This year's biggest winner by a long shot, Gordon's has overtaken Carling and Foster's to become Britain's fourth-biggest alcohol brand. It's grown by a gargantuan £156.6m, almost £100m more than the second fastest-growing brand, Heineken (28).

Gordon's Pink – surely the most successful booze launch of the past decade – is responsible for the lion's share of that growth. It added £109m to that figure on its own, while inspiring an unending swathe of imitators. Meanwhile, its expansion into RTD went down an absolute storm: Gordon's Pink gin in tins has pulled in £19.6m since its launch in February 2018. The core gin's growth is not to be sniffed at, either – it's up a respectable £24.5m.

Diageo category director for vodka, rum, gin and Pimm's Anita Robinson says as well as riding the gin wave, the brand has tapped "the shift towards the early evening 'aperitivo moment'" alongside spritz-style drinks like Aperol, and is playing a part in restaurants as well as bars and shops.

"More recently we have seen the gin category

expand into the 'with food' occasions, with 49% of gin volume consumed in food-led outlets," says Robinson.

Another point in its favour is that Gordon's is ridiculously affordable compared to rivals. At a time when the likes of Whitley Neill (43) are charging upwards of £30 per litre, a litre of Gordon's costs £14.74 on average. That makes it the cheapest full-strength spirit in this list (Pimm's and Malibu are technically cheaper, but are roughly half the strength of standard spirits).

And while many of the gins in this list, such as fellow Diageo brand Tanqueray (44) and Greenall's (63), have risen in average price, Gordon's has been stable (edging up just 0.3% on last year).

Robinson says despite the sheer number of new gin products and flavours hitting the market, proliferation on shelves has actually given Gordon's – a far less complicated offer with just two gins, standard and pink, to choose from – a boost.

"The category has become increasingly busy with a host of new products and variants coming to market all the time," she explains. "As a result, we're starting to see a resurgence in well established brands among consumers, Gordon's being one of them."



# britain's biggest alcohol brands



7 (8)

## Strongbow

**SALES:** £311.3m **GROWTH:** 16.7%

Brits are turning to the dark side in droves when it comes to cider: Strongbow has grown by a titanic £44.4m, £38m of which is thanks to its Dark Fruit variant.

In context, Dark Fruit's growth was higher than that of Thatchers (38), Kopparberg (13) and Old Mout (96) combined. That's without even mentioning Strongbow's core cider, which has added £4.9m to its value. It's a turnaround from this time last year, when it was locked in a steep decline, unable to stave off growing competition from posher apple and insurgent flavoured ciders.

Dark Fruit "is a brand that Heineken UK is particularly proud of, that has recruited a monumental following particularly within the millennial generation" says Heineken category and shopper marketing director Toby Lancaster.

"This year we have supported the variant by producing media features that appeal to its dedicated followers" – which are largely on the younger end.

But, he stresses the "active promotion" of Dark Fruit is not the only reason behind

its growth: "It's the sheer love fans have for the brand that is causing its monumental success."

He's not exaggerating. There's even a subset of Dark Fruit superfans who've gone as far as getting the brand's logo tattooed on their bodies.

But Heineken isn't standing still. In June, it announced it had reformulated the entire Strongbow range to remove all artificial sweeteners, flavours and colours. Lancaster says this change will "set Strongbow apart from its key competitors and is set to drive the growth of the brand to even higher levels".

It is indeed a bold move, considering the cult following Dark Fruit in particular has accrued. Regardless, Heineken stresses "taste profiles of all Strongbow cider variants have remained the same and have been positively tested with thousands of loyal Strongbow consumers".

The omens are good – Heineken reformulated Bulmers (81) last year, which helped pull the long-ailing brand out of what seemed like an endless decline. But there's always a risk when you change the recipe for a beloved brand.

Let's hope it's not about to pull a 'New Coke'.

8 (7)

## Hardys

**SALES:** £276.3m **GROWTH:** 1.8%

For a brand of this size, a £5m gain hardly seems much cause for celebration. Especially when you look at Hardys' volume performance. It's managed to shift an extra 79,000 litres, a rise of just 0.2%. But context is everything.

A year ago, Hardys was down more than £20m after a trading dispute with Tesco. Now the brand is gaining value share, says Accolade category director Andrew Nunney.

That's partly down to a 1.6% rise in average prices, which Nunney says was driven by



premium sub-brands Hardys Crest, Hardys VR and Hardys Bin Series being in "double-digit growth".

There is also plenty of innovation. Nunney points to the launch of alcohol-free chardonnay, 2.25-litre boxes and growth in 50cl bottles.

9 (9)

## Jack Daniel's

**SALES:** £244.7m **GROWTH:** -0.6%

Jack Daniel's has tumbled into the red this year, losing £1.4m. Its core Tennessee Whisky was down £1.3m alone, while Honey Whisky fell nearly £1m and the Tennessee Cider shed £1.9m.

It's not all bad news, though. There are various shoots of growth. Its Legacy edition has gained nearly £1m since launch and the Master Distiller Series No 4 has grown nine-fold to be worth over £2m.

Caroline Lesur, head of Jack Daniel's UK, also points out the effects of launching promotions later in the year. "Nielsen data



from May captures the start of our promotions and shows both our original and honey whiskies are back in growth."

To keep this up, the brand will hold various sampling sessions for its RTDs – up just shy of £2m this year – across festivals this summer.

10 (10)

## The Famous Grouse

**SALES:** £216.7m **GROWTH:** 0.2%

Britain's top blended whisky brand stagnated this year, climbing just £400k on volumes down 2.3%. Still, brand manager Lauren Busby insists The Famous Grouse is "outperforming total category value declines of 6.8%" in the face of "tough trading conditions and increased competition from other spirits sub-categories".

Indeed, compared with its nearest competitor Bell's (26) – which lost £13.3m this year – Grouse's modest value growth is not to be sniffed at.



Key to remaining in the black was the brand's Cask Series range. Combined, the Bourbon and Ruby Cask lines have accrued £1.1m since their launches in April and July last year respectively. Meanwhile, the brand's original whisky slipped more than £150k.



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# britain's biggest alcohol brands

**16** (27)

## Yellow Tail

**SALES:** £150.1m **GROWTH:** 26.4%  
Yellow Tail has added £31.3m to its value – that's the largest gain of any wine brand in this ranking, and the eighth-greatest gain overall.

Simon Lawson, GM of owner Casella Family Brands, attributes the success to "keeping things simple and focused" since taking on the Yellow Tail brand from Diageo three years ago.

That means trading on its status as a more upmarket wine, which has helped it stand out in the age of premiumisation. Plus, ploughing millions into a bombardment of advertising.

In 2018 it mounted a major £2m-plus TV campaign, which

it has brought back for 2019.

"Our sales, marketing and supply teams have focused on initiatives that will drive our brand awareness, and ultimately our brand purchase and rate of sale," says Lawson.

Which has made activity on the shelf a major priority. "We always recommend initiatives such as brand blocking, which we believe makes a massive difference to the standout of our brand, and improves the ease of shop for a category that can be complicated to navigate for some shoppers."

Given the speed at which Yellow Tail has rocketed up this list, it could end up in the top 10 in coming years.

There is "still significant headroom for growth for such a strong consumer brand," says Lawson.


**11** (11)

## Carlsberg

**SALES:** £188.5m **GROWTH:** 2.5%  
After years in the wilderness, Carlsberg is back in growth to the tune of £4.6m. The completely new recipe and identity for its core lager – now 'Danish Pilsner' – is proof you can teach an old dog new tricks.

**14** (16)

## McGuigan

**SALES:** £163.7m **GROWTH:** 10.9%  
With Brits drinking less but better, McGuigan has spent big on ads trumpeting its premium credentials. A new trio of Australian sparkling wines also helped overall brand sales fizzle ahead by £16.1m.

**18** (12)

## Echo Falls

**SALES:** £146.4m **GROWTH:** -11.1%  
Echo Falls' £18.3m loss is the third largest of any brand in this list, but at least its move into spirits is doing well: Summer Berries Vodka is up £5m to £6.8m, and the brand launched its first fruity gin in May.

**15** (18)

## Corona

**SALES:** £160.7m **GROWTH:** 15.4%  
Corona, like many other world lagers, scored a blinder in the World Cup. The Budweiser Brewing Co brand added a cool £21.5m to its value, representing the fifth biggest gain of any beer in this list.


**12** (14)

## Barefoot

**SALES:** £180.6m **GROWTH:** 19.0%  
Barefoot's £28.8m gain is the second largest of any wine brand in this list, pushing it closer towards a top 10 slot. Dominating the blossoming canned wine market is next on its checklist.

**17** (20)

## Peroni

**SALES:** £147.4m **GROWTH:** 9.6%  
Like many continental lagers on this list, Peroni is on the up. It's gained an extra £12.9m, almost entirely driven by its core Nastro Azzurro variant. The new Libera alcohol-free brew, launched in January, also racked up £283k.

**19** (19)

## Glen's

**SALES:** £142.9m **GROWTH:** 4.6%  
Minimum pricing laws in Scotland played a major part in adding £6.3m to the value of the UK's second most popular vodka. That its pricier Platinum variant nearly tripled its value to £1.7m helped a bit, too.

**13** (15)

## Kopparberg

**SALES:** £164.4m **GROWTH:** 8.5%  
Kopparberg raked in an extra £12.8m this year. Now, like Echo Falls (18) and Blossom Hill (20), it's moving outside its heartlands. The brand has recently launched two gins: an RTD and an 'aqua spritz'.


**20** (13)

## Blossom Hill

**SALES:** £141.8m **GROWTH:** -9.5%  
Another affordable wine casualty, Blossom Hill is down £14.9m. Like its closest rival Echo Falls (18), it is looking to spirits for inspiration: it recently rolled out a 'Gin Fizz' to tap the growing spritz trend.



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YEAR OLD  
SHOPPERS<sup>1</sup>**

**SOL 30%  
GROWTH<sup>2</sup>**



# SET IT FREE

**DESPERADOS  
27%  
GROWTH<sup>2</sup>**



<sup>1</sup>Source: Kantar Alcovision Off Trade Drinkers L52W's to 31.03.18  
<sup>2</sup>Source: Nielsen Total Coverage MAT Value Sales data to 08.06.19

**drinkaware.co.uk**  
for the facts



# britain's biggest alcohol brands

28 (42)

## Heineken

**SALES:** £124.6m **GROWTH:** 77.1%  
Heineken has pulled in an extra £54.2m this year. That's the largest gain of any beer brand, and the second-largest gain overall in this ranking, behind Gordon's (4).

Heineken credits much of this success to new formats such as pint and 440ml cans, which the brand's category and shopper marketing director Toby Lancaster says "helped drive sales by offering consumers another convenient pack size to suit their requirements".

But there's more to it than that. Heineken has spent the past year ramping up its focus on individual retailers and merchandising. It unveiled

a new category strategy called 'The Greenpaper' it claimed would help retailers – particularly convenience and independent retailers – significantly grow sales.

It's easy to be cynical when brands talk about wanting to 'grow the category', but the sheer amount of beer sold by Heineken this year suggests the hands-on approach is really working.

And of course the World Cup had a massive effect, Lancaster admits. But he says this growth "continued throughout the Halloween and Christmas periods, as well as across other sporting events such as the F1 and Champions League, through dedicated fixtures promoting Heineken's relevance during these occasions".



24 (25)

## Baileys

**SALES:** £133.2m **GROWTH:** 10.6%  
While the original variant predictably made most money, it was Strawberries & Cream that most impressed, reaching £11.9m from a standing start. The new vegan Almande did OK too, earning £3.8m.

27 (24)

## Captain Morgan

**SALES:** £126.5m **GROWTH:** 2.7%  
Limited-edition bottles with names like 'Drama' and 'Banter' helped the Captain stay afloat. Plus, says owner Diageo, rum is up and coming, offering "accessibility, versatility and premiumisation".

21 (26)

## San Miguel

**SALES:** £140.6m **GROWTH:** 17.7%  
Distribution gains and a shift to smaller can formats are driving much of San Miguel's growth, says owner Carlsberg, along with San Miguel's three-year, experience-led #FindYourRich campaign.

25 (21)

## Russian Standard

**SALES:** £132.3m **GROWTH:** 1.5%  
'Instagrammable' appeal was a key focus for Russian Standard this year. The brand launched a mobile cocktail stall at Latitude Festival, which enabled consumers to create their own personalised Russian Mules.



22 (23)

## Casillero del Diablo

**SALES:** £135.6m **GROWTH:** 7.3%  
Britain's bestselling Chilean wine brand has added £9.2m to its top line. The brand has been busy investing in marketing to capitalise on the troubles facing European wine producers – helping it gain space in Asda.

26 (17)

## Bell's

**SALES:** £129.2m **GROWTH:** -9.3%  
Bell's £13.3m plunge is the biggest loss of any spirit in this list. Blended scotch has fallen out of fashion, losing ground to bourbon and Irish. And its nearest rival, Grouse (10), is slightly cheaper on average.

29 (28)

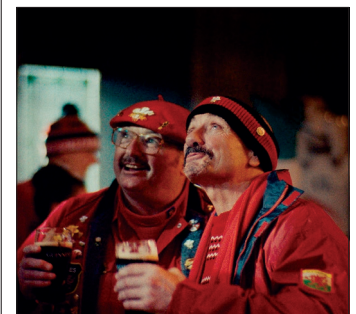
## Bacardi

**SALES:** £111.0m **GROWTH:** -0.4%  
Overall sales may be flat at Bacardi, but its focus on new flavoured rums is reaping rewards. Bacardi Raspberry has amassed £2.8m while Ginger is worth £700k. And "huge hit" Spiced is just shy of £1.1m.

23 (22)

## Kronenbourg 1664

**SALES:** £135.5m **GROWTH:** 6.2%  
It might have been overtaken by San Miguel (21), but there's nothing shabby about Kronenbourg's £7.9m gain. Shoppers have downed an extra four million litres as the premium lager trend continues.



30 (31)

## Guinness

**SALES:** £106.5m **GROWTH:** 4.4%  
Brits have supped an extra 2.2 million litres of Guinness draught this year. The brand is hoping to grow even more through its new sponsorship of rugby's Six Nations, and its first new TV ad in five years.





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IRI 52w/e 25th May 2019 volume sales.



40 (81)

## Birra Moretti

SALES: £73.5m GROWTH: 118.7%

Italian lager Moretti is up 41 places in our ranking, making it this year's highest climber. That's all the more impressive when you consider it's the second most expensive lager in the top 100, behind Peroni (17).

Its success is testament to the extent Brits are willing to splash out on drinks they perceive to be a cut above the rest, especially when it comes to world lagers. And, of course, the World Cup effect. The footie action meant Birra Moretti's mighty £39.9m gain was still only the fourth-largest of any lager brand.

Heineken category and shopper marketing director Toby Lancaster says Birra

Moretti's "pale colour and carbonation make it light enough to complement almost all food types".

Thus the brand has spent the last year positioning itself as an upmarket meal accompaniment – much the same strategy as arguably its closest competitor, Estrella Damm (54).

It wasn't all good news: Moretti's spin-off duo of 'Siciliana' and 'Toscana' beers both fell into decline, albeit from a small base. Its latest NPDP, an alcohol-free version of the core beer, is a far safer bet.

Regardless, after the stars aligned so poignantly for lager brands like Moretti in 2018, it's likely the biggest challenge the brand will have to face over the coming year is a set of extremely tough comparables.



31 (33)

## Isla Negra

SALES: £105.1m GROWTH: 9.7%

Isla Negra has shifted an extra 1.1 million litres by mopping up sales lost by Kiwi and Aussie brands such as Villa Maria (47) and Jacob's Creek (62), which bore the brunt of environmental and currency issues.

34 (32)

## Coors Light

SALES: £94.8m GROWTH: -4.9%

As other brands spent big on marketing, Coors Light found itself overshadowed. But it's hoping to return to last year's multimillion-pound growth with the big bang launch of its 'That's Cold' campaign in April.



32 (30)

## Campo Viejo

SALES: £98.3m GROWTH: -3.8%

Campo's £3.8m decline belies a 7.7% volume slump. Pernod Ricard hopes to revive growth (and Campo's street cred) with the launch of the brand's first-ever rosé in July and its ongoing Streets of Colour campaign.

35 (43)

## I Heart

SALES: £93.9m GROWTH: 37.0%

New champagne, Italian sparkling and canned lines helped bump up I Heart by £25.4m this year. It hopes to build on that growth this summer with its first TV ad alongside ITV's Love Island.

37 (40)

## BrewDog

SALES: £86.2m GROWTH: 21.2%

BrewDog's reign as king of craft beers continues. This year saw the Aberdeenshire brand release its first range of supermarket sour beers and move further into spirits from its BrewDog Distilling arm.

33 (29)

## Gallo Family Vineyards

SALES: £96.6m GROWTH: -8.1%

Gallo slipped four places in this year's ranking as 1.4 million fewer litres were sold, hitting value by £8.5m. Still, a new partnership with Virgin Experiences could be the start of more positive figures to come.



38 (46)

## Thatchers

SALES: £81.1m GROWTH: 25.9%

Thatchers is up a cool £16.7m, thanks to Brits' unwavering appetite for posher apple ciders. It's now eyeing growth in the booming fruit cider sector with its latest NPDP, the canned Thatchers Rosé.



36 (34)

## Bombay

SALES: £93.6m GROWTH: 3.2%

On the face of it, a £2.9m gain isn't bad going. But compared to the stellar gains of Gordon's (4) and other gin brands, it's small fry. So Bombay is hoping to up the pace with upcoming limited edition flavours.

39 (37)

## Wolf Blass

SALES: £80.5m GROWTH: 0.0%

Despite winning space in last April's Tesco range review, Wolf Blass has seen volumes slip 1.3% as drinkers switch to lighter wines. It's hoping its Cricket World Cup sponsorship will shake things up.





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43 (122)

## Whitley Neill

**SALES:** £71.3m **GROWTH:** 309.3%  
By far the fastest-growing brand in percentage terms this year, Whitley Neill has soared 79 places in this year's ranking. That makes it the third-largest gin brand, just above Tanqueray (44).

Almost half of the brand's £53.9m growth this year can be attributed to just one of its flavoured gins: Rhubarb & Ginger. One of the brand's first flavours, it added a staggering £25.7m to Whitley Neill's value alone. Meanwhile its Parma Violet flavour, introduced last August, added a further £11.3m to sales.

According to Leanne Ware, white spirits director at Whitley Neill's parent brand

Halewood Wines & Spirits, a key sales driver this year was the brand's above the line campaign in March, its largest to date. "We focused mainly on central London, encompassing major stations and underground takeovers, taxi wraps, billboards, and national print," she says.

Ware believes Whitley Neill's speedy introduction of new flavours is another major contributor to growth. A slew of new lines – most recently, a pink grapefruit flavour that has amassed £745k in sales since launching this summer – have joined the range over the past year.

Sustaining current growth will be no mean feat, but the brand plans to do so through "dialling up relevance in food pairings" this year.



45 (36)

## Beck's

**SALES:** £70.4m **GROWTH:** -13.2%  
Beck's is down £10.7m. That's the second worst performance of any beer in this list after Carling (6). It faced a double whammy of competition on shelf from posher world brews and alcohol-free NPD.

48 (44)

## Courvoisier

**SALES:** £65.6m **GROWTH:** 1.1%  
Courvoisier has mustered a modest £700k gain despite a 1.9% volume dip. The brand attributes that to premium products like Courvoisier Extravagance, launched as a Christmas exclusive last year.

41 (52)

## Tennent's

**SALES:** £72.9m **GROWTH:** 27.3%  
Scotland's bestselling lager has outgrown its homegrown bestselling craft beer, BrewDog (37), with a £15.6m gain. Growth in smaller cans has helped drive a 20.8% rise in average price, the greatest in this year's list.

46 (51)

## Absolut

**SALES:** £66.3m **GROWTH:** 14.4%  
An £8.4m gain gave Absolut the highest absolute growth of any vodka brand in the top 100. A quarter of those extra sales came from Absolut Juice, a craft-inspired range of 500ml bottles launched last July.



42 (38)

## Grant's

**SALES:** £72.4m **GROWTH:** -5.0%  
The £483k racked up by last summer's Triple Wood Smoky and Rum Cask Finish hasn't been enough to offset losses of Grant's core whisky. It has shifted 268,000 fewer litres, representing a decline of £3.3m.

47 (39)

## Villa Maria

**SALES:** £65.6m **GROWTH:** -12.8%  
Difficult conditions in New Zealand, hit by record rainfall, high temperatures and three cyclones in 2018, posed big challenges for Villa Maria: its £9.6m decline is the fourth-greatest loss of any wine brand.

49 (41)

## Whyte & Mackay

**SALES:** £65.5m **GROWTH:** -7.5%  
It's another year of decline for Whyte & Mackay, down £5.3m. But it's hoping to attract younger shoppers with the launch of its 21.5% abv 'light spirit drink' in June, targeting the low/no alcohol trend.

44 (56)

## Tanqueray

**SALES:** £70.9m **GROWTH:** 40.7%  
If there's one thing British drinkers love almost as much as gin, it's fruity flavours. Tanqueray's orangey Flor de Sevilla made an extra £13.3m, helping the UK's number three gin grow volumes by 32.9%.



50 (47)

## Lindeman's

**VALUE:** £65.4m **GROWTH:** 2.0%  
Lindeman's has held its own amid challenging times for wine, up £1.3m thanks in part to the July 2018 relaunch of the Bin range. It's since made its first foray into low-alcohol with a trio of 0.5% abv wines.



**51** (45)**John Smith's****SALES:** £64.1m **GROWTH:** -0.6%

John Smith's Extra Smooth actually grew sales (albeit marginally) this year, but the brand's overall performance was hindered by its Original brew, down over £400k as Brits traded out of traditional bitters.

**57** (50)**Hen****SALES:** £56.7m **GROWTH:** -4.4%

Premium bottled ales have lost their froth to trendy craft beers. So it's small wonder that the sector's bestseller is struggling. Greene King is hoping its foray into low alcohol, and a new TV ad, will revive Hen sales.

**52** (49)**Brancott Estate****SALES:** £63.1m **GROWTH:** 4.0%

Selling an extra 210,000 litres, Brancott continues to benefit from the shift to pricier wines. Pernod Ricard is looking to build on its £2.4m gain with the launch of organic and vegan wines retailing at £10 a pop.

**54** (65)**Estrella Damm****SALES:** £58.7m **GROWTH:** 48.1%

Estrella Damm says its "100% Mediterranean" credentials are behind its stellar £19.1m gain. But it has a fight on its hands for the growing world lager market, having been overtaken by the ambitious Birra Moretti (40).

**58** (53)**Three Barrels****SALES:** £56.3m **GROWTH:** 1.0%

Britain's bestselling brandy is keeping its head just above water with a £600k gain. It mitigated the withdrawal of its honey variant with seasonal promotions and marketing that encourages its use in cocktails.

**53** (58)**Desperados****SALES:** £60.0m **GROWTH:** 30.7%

Last year's red hot summer wasn't the only factor driving smoking sales for Heineken's tequila-flavoured lager. Desperados expanded its presence in Tesco and also won space in Asda's range review.

**55** (57)**Oyster Bay****SALES:** £57.7m **GROWTH:** 19.6%

Two trends have helped Oyster Bay shift an extra million litres (a spike of 24.2%) and grow by £9.5m: the supermarkets' push to the posher end of the wine spectrum and surging sales of sauvignon blanc (up 5.6%).

**56** (54)**Magners****SALES:** £57.3m **GROWTH:** 9.0%

Magners has benefited from the colossal growth of fruit ciders – its new(ish) Dark Fruit cider has grown seven-fold, adding £3.3m. Next up is a lighter 'Rosé' cider designed to take the flavoured trend upmarket.

**59** (55)**Westons****SALES:** £55.7m **GROWTH:** 9.1%

Britain's love affair with posh apple ciders has sent Westons' sales surging £4.7m. The flavoured boom has helped too: Westons says Stowford Press Mixed Berries is its most successful launch in years.

**60** (66)**Freixenet****SALES:** £55.1m **GROWTH:** 43.9%

Following the cava brand's successful foray into prosecco back in 2017, Freixenet has kept its focus on NPD. This includes the rollout of an Italian sparkling rosé last April, followed by alcohol-free sparkling white and rosé bottles in October.

Keen to keep up the momentum, Freixenet launched 20cl bottles of prosecco and Italian sparkling rosé in May.

These new lines and the continued popularity of prosecco were a driving force behind its £16.8m growth this year, says Freixenet. The signature cut glass bottles have succeeded in attracting a high-end market, it adds.

"Consumers are trading up this year, and the premium prosecco segment is seeing strong growth," says Damian Clarke, MD of Freixenet Copestick.

All this activity was supported by hefty marketing investment spanning print, in-store and digital activity, alongside a partnership with music festival Bestival.

The growth shows no sign of slowing, if the brand's acquisition by German sparkling wine giant Henkel last August is anything to go by. It has given Freixenet "exposure to an even broader mix of sister companies within the group with a range of capabilities", says Clarke.

Indeed, sister brand I Heart (35) also saw double-digit growth. Looks like sparkling wine has plenty of fizz left in it.





62 (35)

## Jacob's Creek

**SALES:** £51.5m **GROWTH:** -42.2%  
Pernod Ricard's Aussie wine brand has fallen harder than any other name on this year's list, shedding an eye-watering £37.5m after selling almost seven million fewer bottles.

This was the result of Pernod's decision to pull numerous lower-priced SKUs from leading mults – most recently Asda – as a money-saving exercise, according to the supplier.

“Jacob's Creek has experienced both volume and value decline over the past year, which has been driven by a number of factors: foreign exchange rates, Brexit and cost of goods increases.

“These factors have

impacted the profitability of the brand and, therefore, for accounts where profitability could not be maintained, we decided to delist.”

To recoup losses, Jacob's Creek has pivoted towards a more premium offer, Pernod Ricard adds.

This move to tap demand for posher wines has seen “average price increase, driven by listings of NPD such as Le Petit Rosé”. Indeed, Jacob's Creek's £8 French-style wine, aimed at drinkers keen on lighter, drier wine, is one of the driving forces behind its 5.9% average price rise.

Then there's the £11 Aperitivo Spritz, an 8.5% abv pre-mixed drink launched last summer as a challenge to Italian apéritif brands Aperol and Campari.



65 (69)

## Jameson

**SALES:** £45.7m **GROWTH:** 23.5%  
With volumes up more than a quarter, Jameson is at the vanguard of the whiskey revival. That's thanks to premium lines such as Black Barrel winning listings and its first TV ad in seven years.

68 (64)

## Lambrini

**SALES:** £41.7m **GROWTH:** 5.1%  
A “complete marketing and partnership refresh” last year helped boost Lambrini sales by £2m. The brand is banking on its £5 Fully Sparkling variant, a new low-alcohol prosecco alternative, to maintain growth.

61 (48)

## Kumala

**SALES:** £54.8m **GROWTH:** -12.9%  
South African wines like Kumala lost out as shoppers opted for more premium new world wines like Barefoot (12) and Yellow Tail (16). A string of difficult vintages in the region haven't helped.

66 (60)

## Jim Beam

**SALES:** £45.0m **GROWTH:** 1.8%  
Jim Beam added £800k to its value, but that was all down to price rises (your average litre is 2.2% pricier year on year). Brits actually drank slightly less of the spirit in 2019, despite the vogue for imported whiskey.

69 (67)

## Canti

**SALES:** £41.2m **GROWTH:** 8.3%  
Canti's £3.2m gain makes it the third fastest-growing sparkling wine by absolute value in this list, behind I Heart (35) and Freixenet (60). Which suggests Brits' rabid thirst for prosecco is anything but satiated.

63 (61)

## Greenall's

**VALUE:** £47.9m **GROWTH:** 8.6%  
Like most of the gin crowd, Greenall's has done pink and is now looking at other flavours. It's playing up its zero added sugar credentials for its latest NPD, Greenall's Blueberry, which hit shelves in March.



70 (59)

## Moët & Chandon

**SALES:** £39.9m **GROWTH:** -10.4%  
Moët attributes its double-digit value and volume (15.8%) losses to its “voluntary decrease of price promotions” this year, which “were not compatible with or reflective of its premium brand positioning”.

64 (62)

## Oxford Landing

**SALES:** £47.0m **GROWTH:** 10.8%  
Here's another Aussie wine brand benefiting from the poor harvests that hit Italian and French winemakers last year. Oxford Landing's £4.6m gain equates to an extra 570,000 litres, a rise of 11%.

67 (71)

## Trivento

**SALES:** £43.5m **GROWTH:** 20.1%  
Another year, another sales jump of more than a fifth for Trivento. Propelled by Britain's seemingly unquenchable thirst for Argentinian malbec and last year's rollout of a 2017 Reserve Malbec, the brand is up £7.3m.





**72** (68)**WKD**

**SALES:** £38.9m **GROWTH:** 5.1%  
NPD such as a Mango variant and canned cocktails buoyed WKD. But owner SHS Drinks says the real secret to its £1.9m gain was “supporting the brand in its entirety” via the likes of a major social media push.

**75** (75)**Pimm's**

**SALES:** £36.1m **GROWTH:** 2.2%  
You might expect Pimm's sales to have soared amid last year's scorching summer. Instead, volumes dropped 6.6%, with the £800k growth being entirely price-led. However, the flagship No 1 still sold 231k more litres.

**76** (79)**Chekov**

**SALES:** £36.0m **GROWTH:** 6.0%  
Booker's value vodka has put an extra £2m through independent retailers' tills this year, or an extra 66,000 litres. Much of this is down to surging sales of price-marked 35cl and 20cl formats, launched in 2017.

**78** (77)**Malibu**

**SALES:** £34.6m **GROWTH:** 0.7%  
Despite sales of its original coconut dropping £1.5m, Malibu has maintained value thanks to its Passionfruit variant (now worth £2.3m) and RTD range, which recently expanded with a Fizzy Pink Lemonade flavour.

**73** (63)**Rekorderlig**

**SALES:** £38.0m **GROWTH:** -4.5%  
More expensive on average than its closest competitor Kopparberg (13), Molson Coors' Rekorderlig fell £1.8m and volumes declined 8.3% despite the massive boom in fruity, flavoured ciders.

**77** (72)**Calvet**

**SALES:** £35.3m **GROWTH:** -2.1%  
Volumes of Britain's biggest French wine brand have dipped 4.5%, a 'blip' owner Les Grands Chais de France puts down to a short vintage. It believes the 2018 yield will see sales “revert to an upwards trend”.

**79** (74)**Tyskie**

**SALES:** £34.5m **GROWTH:** -3.1%  
Polish lager Tyskie entered the top 100 back in 2014. It's been in growth every year since, bar 2015. This year, it's suffered from the rise of Czech, Italian and Spanish lagers as brewers spend big on marketing.

**74** (103)**Amstel**

**SALES:** £37.5m **GROWTH:** 70.8%  
Amstel is building bridges. After being unceremoniously dumped by Tesco in 2017, the Dutch lager reappeared on its shelves last year. It wants to sustain the growth with a £7m ad push starring Jeff Bridges.

**80** (78)**Hobgoblin**

**SALES:** £33.8m **GROWTH:** -1.3%  
Hobgoblin's 3.2% drop in volumes was due to the phasing out of price promotions on single bottles, says brand manager Jo Wyke. But she says its IPA, now worth nearly £2m, is attracting new drinkers.

**71** (86)**Buckfast**

**SALES:** £39.4m **GROWTH:** 29.8%  
Here's to Buckie! UK sales of Buckfast Tonic Wine have hit a record 3.9 million litres. That's a third more than a year ago, and a rise of £9m.

The brand has been an unlikely beneficiary of minimum alcohol pricing in Scotland, which came into force last May. Considering that was intended to curb problem drinking, it may seem odd that a brand so often linked to the national press to antisocial behaviour has thrived.

But there is a logical reason for its boom. The price of a standard 75cl bottle, which contains caffeine and is 15% abv, has stayed around £8. That's because it was already above the threshold for

minimum unit pricing.

By contrast, the minimum price of a three-litre bottle of 7.5% abv white cider in Scotland has soared to £11.25. Previously, such lines would sell for under £4. That's resulted in white cider bestseller Frosty Jack's (93) slumping 10% in volume.

Distribution gains outside of Buckfast's core Scotland market have also helped drive growth, as have growing sales of cans and miniature 5cl bottles designed to encourage trial purchases.

Plus, the brand is trying to establish itself as a cooking and cocktail ingredient, having teamed up with Michelin-starred chef Martin Blunos, who has created such recipes as Brined Buckfast Can in a Chicken and Buckfast Glazed Gammon.





83 (99)

## Hop House 13

**SALES:** £33.4m **GROWTH:** 44.2%  
Hop House 13 is “the most successful beer launch in Great Britain in the last decade” says owner Diageo.

There are plenty of brands that would argue that title. But something you can't argue with is its £10.2m gain – making it the UK's fifth fastest-growing beer by percentage.

Diageo believes this is down to Hop House being a “premium lager with more character and more flavour than traditional lager”.

“It is full of flavour, yet still accessible, bridging the gap between craft and world lager.”

Another reason for the growth, of course, was the dream combination of last

summer's heatwave and the heroic showing by the England team in the World Cup.

“Last year, during peak summer months, beer sales in the off-trade increased by 23%, with the average price per litre increasing as proximity, availability and chilled refreshment became key purchase drivers,” says Diageo. For Hop House, that meant an extra 3.6 million litres went through supermarket tills across the year.

At £2.86 a litre, the brand is among this list's priciest lagers. And that's fine with Diageo. “In the beer category, consumers are increasingly looking for unique products that provide a quality taste experience, and they are willing to pay more for them,” it says.



81 (76)

## Bulmers

**SALES:** £33.6m **GROWTH:** -2.9%  
After years of plummeting sales, Bulmers relaunched last year with a new recipe and major TV campaign. It looks to have paid off: value decline has slowed and volumes are up 1.8%, so a return to growth looks possible.

86 (101)

## Mud House

**SALES:** £31.2m **GROWTH:** 36.4%  
Kiwi wines are up 6.7% to £519.2m, says Accolade Wines, which describes Mud House as “driving these sales and the profit opportunity for the trade”. Distribution gains were a major force behind its £8.3m lift.



85 (70)

## Martini

**SALES:** £32.3m **GROWTH:** -12.0%  
Martini has plummeted 15 places in our ranking with a £4.4m blow. It's pinning its hopes on its Martini Fiero NPD to tap the growing trend for aperitivos and appeal to a new “younger adult audience”.

88 (73)

## Cobra

**SALES:** £30.6m **GROWTH:** -14.5%  
Cobra is hoping to turn around its £5.2m decline, the third largest of any beer, with a new brand identity targeting foodies. The rebrand is supported by a £2m campaign, spanning social, digital and food events.

82 (90)

## Sharp's

**SALES:** £33.5m **GROWTH:** 20.1%  
Doom Bar, Sharp's chief brand, gained a whopping £6.3m this year. That was down to “broadening shopper footprint with launches into can and mini-keg formats” says senior brand manager James Nicholls.

87 (93)

## The Ned

**SALES:** £30.8m **GROWTH:** 18.3%  
The Ned is slowly becoming one of Britain's favourite wines, having smashed its way into this list in 2018. The third most expensive wine here (just behind Oyster Bay and Villa Maria), it's grown by £4.8m.

89 (89)

## Glenfiddich

**SALES:** £30.6m **GROWTH:** 4.8%  
Britain's bestselling single malt is cashing in on demand for pricier and more innovative scotch. The premium 15-year-old contributed nearly £900k, while its Experimental range grew a fifth to £1.3m.

84 (80)

## Southern Comfort

**VALUE:** £33.2m **GROWTH:** -2.3%  
Highlighting premium credentials hasn't stopped Southern Comfort falling £774k, driven by a £1m decline in sales of its original bottles. However, last year's 40% abv Black launch has amassed £674k.



90 (82)

## Disaronno

**SALES:** £30.1m **GROWTH:** -8.2%  
Despite making an extra £230k with its Sour RTD, Disaronno saw its sales drop £2.7m overall this year. The brand will hope its newly appointed UK country director Neil Jardine is going to drive it back into growth.



91 (87)

**Torres****SALES:** £30.1m **GROWTH:** -0.6%

Torres and its bestselling Spanish white Viña Sol have been left in the shade, sinking by nearly 200,000 litres. Rising average prices mean that the brand's value slipped at a slower rate of £190k.



98 (96)

**Greene King****SALES:** £26.3m **GROWTH:** 9.3%

Traditional ale is in decline but Greene King has bucked the trend, putting that down to its broad portfolio including fashionable IPAs. Chief among them is IPA Bitter, which has grown by a blistering 45.8%.

92 (84)

**Veuve Cliquot****SALES:** £28.8m **GROWTH:** -6.0%

Veuve's move away from promotions mirrors fellow LVMH brand Moët (70). That's resulted in 637,000 fewer litres sold. However, Veuve believes its 3.7% average price increase will drive value growth.

94 (88)

**Lanson****SALES:** £27.5m **GROWTH:** -7.1%

Rising prices have spelled another year of decline for Lanson. The brand joins Moët (70) and Veuve (92) in hefty volume losses - 8.7%, to be precise - as penny-pinching Brits ditch champagne.

99 (111)

**Staropramen****SALES:** £26.0m **GROWTH:** 32.5%

British-brewed Czech lager Staropramen has marked its 150th year by breaking into the top 100 in style. It's shifted an extra 2.2 million litres as demand for pricier, continental-style lager continues to rise.



95 (97)

**Cono Sur****SALES:** £27.3m **GROWTH:** 14.4%

Cono Sur says its £3.4m gain is largely down to continued investment. That investment took the form of a Food Network partnership and TV push 'Crafted with Care'. Its Viognier variant did especially well.

100 (115)

**Edinburgh Gin****SALES:** £26.0m **GROWTH:** 39.3%

Having consistently gained ground in previous rankings, Edinburgh Gin burst into the top 100 this year. The brand says its growth was bolstered by its first multimillion-pound campaign and new RTD range.

93 (85)

**Frosty Jack's****SALES:** £28.7m **GROWTH:** -6.0%

A new tax band for stronger ciders between 6.9% and 7.5% abv has made life harder for the likes of Frosty Jack's this year. The resulting 4.5% hike in average price has seen two million fewer litres shifted.

97 (83)

**Holsten Pils****SALES:** £26.8m **GROWTH:** -15.1%

A £4.8m decline has put Holsten on course to bow out of the top 100. Nevertheless, distributor Carlsberg UK points to 0.7% growth in the impulse channel, which accounts for 59% of volume sales.



96 (106)

**Old Mout Cider****SALES:** £27.1m **GROWTH:** 33.5%

Heineken's Kiwi cider brand returns to the top 100 this year after winning a slew of new listings in the mults.

How things change. This time last year, sales were down double digits, relegating it from 99th to 106th place.

Now every variant is in growth, generating a combined £6.8m in value - the equivalent of 2.1 million extra litres through the tills.

Much of this is thanks to the wider fruit cider boom and a slight dip in price: Old Mout is just under 2% cheaper per litre on average this year. Although it's still the third most expensive cider in this list, it's slightly more competitively priced than Kopparberg (13)

and Rekorderlig (73).

Its most recent addition, Pineapple & Raspberry, is off to a promising start, having racked up £366k in sales in one month on shelf. Heineken cites growing demand from younger Gen Z shoppers for "more exotic, premium flavours" as a factor. This demographic was also the inspiration behind its alcohol-free cider.

Old Mout is currently busy trying to turn itself into the naturalist's drink of choice. Last year saw it plough £3.5m into a campaign encouraging the public to help save the endangered Kiwi bird, while this year it's partnered with WWF for its TV debut, playing up its sustainability and vegan credentials.

Which suggests the 'Attenborough effect' goes further than just recycling.





# The rising stars

The top 100 can't afford to rest easy. From a gothic-looking wine to a Beckham-backed whisky, there are plenty of brands waiting to break into next year's list. And there's nothing small about their growth: Beefeater (right) has gained £12.3m, more than number two brand Smirnoff. Here are the ones to watch, based on absolute value growth



**137**  
**Beefeater**

**SALES:** £15.6m  
**GROWTH:** 371.5%

Beefeater has struck gold with its Pink Strawberry variant. Launched in early 2018, it has gone on to amass £11.6m, the lion's share of the brand's value this year.

Beefeater has three factors in its favour, says owner Pernod Ricard: a "visual appeal" and a "sense of playfulness", while appealing to consumers "looking for premium but unpretentious drinks".



**136**  
**19 Crimes**

**SALES:** £16.1m  
**GROWTH:** 277.4%

On paper it shouldn't work. A gothic-looking wine brand themed around prisoners exiled to Australia, complete with its own AR app that brings the prisoners' mugshots to life on the wine bottles. But the fledgling Treasury Wine Estates brand has exceeded all expectations, picking up listings in Tesco, Asda and Morrisons, and gaining £11.8m in the past year.



**119**  
**Taittinger**

**SALES:** £18.7m  
**GROWTH:** 36.4%

Taittinger's £5m growth flies in the face of the declines among rivals Moët (70), Veuve (92) and Lanson (94), who are suffering from shoppers turning to cheaper tipples. Granted, it is less expensive than Moët. But Taittinger isn't the cheapest champagne either: Lanson undercuts it by £5.20 per litre. Which makes the extra 123,000 litres sold all the more impressive.



**130**  
**The Shy Pig**

**SALES:** £16.4m  
**GROWTH:** 32.9%

Shoppers' growing thirst for more virtuous booze has certainly benefited this unassuming brand from Australian Vintage, which is just 10.5% abv.

A Morrisons listing last June for the small (187ml) format of its Blush variant no doubt also helped The Shy Pig grow its value by £4.1m. Volumes are up 24.2%, equating to an extra 575,000 litres sold.





### 125 Most Wanted

**SALES:** £17.3m  
**GROWTH:** 87.7%

With a gain of £8.1m, multi-region wine brand Most Wanted grew faster than many established brands in the category, such as The Ned (87), Trivento (67) and even the UK's biggest, Hardys (8). Andy Talbot, MD of owner Off-Piste Wines, says that's largely thanks to "fantastic" growth in distribution in UK retailers. Indeed, the brand won a slew of listings in the mults this year.



### 110 Red Stripe

**SALES:** £20.5m  
**GROWTH:** 36.8%

Heineken's Jamaican lager brand added £5.5m, benefiting not just from the World Cup and the hot summer, but also from a 2.7% dip in price. That resulted in an extra 2.2 million litres going through the tills.

Now Heineken's trying to pull a Jack Daniel's and make it the go-to beer for indie rock fans, with a series of sponsored gigs. Rock on!



### 133 Dark Horse

**SALES:** £16.4m  
**GROWTH:** 46.2%

With its adult, slightly edgy branding and firm premium positioning, Californian wine brand Dark Horse had a storming summer last year. Its £5.2m gain is larger than that of the number one wine brand, Hardys (8). It also broadened its distribution in Asda and Tesco and unveiled NPD including a dry rosé and a new Californian malbec to tap the current vogue for the varietal.



### 145 Sol

**SALES:** £14.7m  
**GROWTH:** 36.6%

In November, Sol's new global push demanded that consumers 'Taste the sun'. Brits seem to have followed orders. Heineken's Mexican lager grew faster in percentage terms than its main rival, Corona (15), adding a sizeable £3.9m to its value. No doubt being 15% cheaper per litre on average than Corona – £2.66 versus £3.06 – will have helped matters.



### 127 Kraken

**SALES:** £17.0m  
**GROWTH:** 27.1%

Attention-grabbing activity has kept Kraken in the public eye – and growth in the double digits – this year. The brand has shot up £3.6m, led by campaigns like its Kraken Mural, which decorated the Great Eastern Bear art gallery in London last summer. It's also making a statement with NPD, linking up with Surfers Against Sewage in October for a limited edition 75cl bottle.



### 120 Haig

**SALES:** £18.4m  
**GROWTH:** 18.4%

He shoots, he scores. Diageo's David Beckham-fronted pioneering single grain Haig Clubman variant has grown £3.4m alone by flouting almost every category norm. With its blue, square bottle and modern typeface, the brand is a far cry from old-school whiskies like Bell's (26) and Grouse (10), drawing in younger shoppers who don't care about age statements.