Rise & shine?

Rob Brown

Our 2014 survey of Britain's Biggest Alcohol Brands shows we are drinking more and paying more for the pleasure. But is the value and volume turnaround sustainable, or was it just generated by 2013's heatwave?

Britain is hitting the bottle. We've spent £400m (5%) more on the UK's 100 biggest alcohol brands in the off trade [Nielsen 52 w/e 26 April]. And this growth isn't merely inflationary; we've knocked back 70.3 million (3.3%) more litres of branded beer, cider, spirits, RTDs and wine combined.

Of course this doesn't mean we've all been blotto for the past year. While some high-strength brands did surprisingly well – value and volume are up for Skol Super (103) and K (134) – some weaker drinks are absolutely flying: sales of low or no-alcohol lagers and ciders surged 78%. This, and generally higher prices across the top 100, has pushed the cost per unit of alcohol up 3.3%.

Inevitably, the performance of the top 100 was influenced by the longest, hottest heatwave in six years, last summer, which sent sales surging. Pimm's (59) has grown 23% on volumes up 15.2%, thanks in no small part to the hot spell last July. Budweiser (6) enjoyed the greatest gain among the lagers, growing £10.9m (15.5%) in the three months to 27 July alone. In this period the 20 biggest brands in lager, a sector in decline for years, enjoyed a £37.7m (5.3%) fillip.

"Ales, lager and cider saw a huge spike in the scorching weeks last summer. The average number of units sold rose 49%"

And here's the rub: if the weather is to thank for the market's apparent return to form, maintaining growth over the coming year will be a tall order, especially in light of England's early exit from the World Cup and the inconsistent weather of late. So is the market in as good shape as the growth suggests? What other factors beside the weather are influencing the category? Who's basking in glory and who's been burnt?

As our analysis – in partnership with Nielsen – shows, a year ago the situation was much bleaker. Value was flat at £8.2bn; volumes had sunk 2.8% [52 w/e 27 April 2013]. According to some retailers, last July's heatwave had a greater impact on the return to form than our figures show. "Ales, lager and cider saw a huge spike in the three scorching weeks last summer," says Co-operative Group beer & cider buyer Michael Schofield. "The average number of units sold increased 49%."

That a retailer with a large convenience estate saw such strong growth is significant, suggests Chris Quinn, director for multiple retail sales at Bibendum Wines. "Certainly for the big brands, convenience and online are driving big growth," he says. "Rather than doing the big weekly shop, consumers are buying less, more often."

Particularly when it comes to picking up a bottle or two on the way home from work, say brands. Analysis of the three-month period covering last summer's heatwave (see p33), reveals that of the country's biggest beer and cider brands, Desperados (88) and Rekorderlig (74) enjoyed the greatest percentage gains, the former up 209.3%; the latter up 106.4%. Both brands were doing well long before the mercury began to rise. Across the full year Desperados (88) up 107.4%, and Rekorderlig, up 65.4%, have realised the two strongest rates of growth, thanks to the rising popularity of spirit beers and fruit ciders respectively.

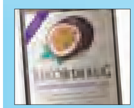
Other big winners of the summer include San Miguel (30) and Peroni (23) – though both were already in strong growth thanks to the continuing popularity of premium world lager – and Foster's (2). Again, there's more to Britain's second-biggest drinks brand's growth than the weather: of Foster's £14.3m growth, £3.2m came from the core lager; £2.6m came from Gold; £8.4m from Radler.

The triple-digit growth of Foster's Radler, a 2% abv fruit beer launched February last year, is reflected elsewhere. Carlsberg's (4) 2.5% abv Citrus offering, launched the same month as Radler, is the only Carlsberg variant in growth, having racked up £7.3m.

The weather alone, then, isn't enough to drive growth; promotions, merchandising and NPD have all been essential.

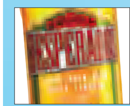
Just look at Pimm's (59). While it's no surprise a brand marketed as the 'perfect summer drink' did well in a heatwave, Pimm's

Who's In

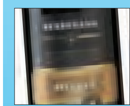


▲ **65.4%**
74 (107) **Rekorderlig**

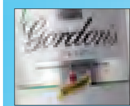
▲ **39.9%**
83 (102) **Tyskie**



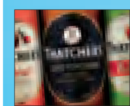
▲ **107.4%**
88 (136) **Desperados**



▲ **19.8%**
93 (101) **Berberana**

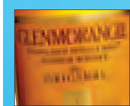


▲ **20.5%**
98 (108) **Gordon's RTD**



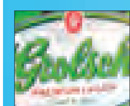
▲ **25.6%**
100 (113) **Thatchers**

Who's Out

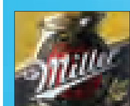


▼ **-5.4%**
104 (98) **Glenmorangie**

▼ **-25.6%**
106 (86) **Gran Familia**

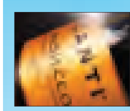


▼ **-13.3%**
112 (100) **Grolsch**



▼ **-18.4%**
115 (97) **Miller**

▼ **-25.2%**
122 (96) **Red Square**



▼ **-59.9%**
138 (71) **Canti**

TOP 100 ALCOHOL BRANDS BY VALUE TOTAL OFF-TRADE

RANK	Up/Down	BRAND	CATEGORY	SALES (£m)	CHANGE (%)	CHANGE (£m)
1	0	Stella Artois	Beer	492.4	0.7	3.3
2	0	Foster's	Beer	472.7	3.1	14.3
3	+1	Smirnoff	Spirits	399.5	6.7	24.9
4	-1	Carlsberg	Beer	353.8	-6.2	-23.5
5	0	Carling	Beer	325.9	4.3	13.3
6	+1	Budweiser	Beer	280.0	9.8	25.0
7	-1	Hardys	Wines	278.5	8.9	22.8
8	+1	Strongbow	Cider	265.8	12.6	29.8
9	-1	Blossom Hill	Wines	248.3	-1.0	-2.6
10	0	Grouse	Spirits	189.4	-2.2	-4.3
11	0	Glen's vodka	Spirits	177.0	-3.5	-6.5
12	+1	Echo Falls	Wines	161.0	4.1	6.3
13	+1	Gordon's	Spirits	160.0	4.5	6.9
14	+2	Jack Daniel's	Spirits	158.3	22.6	29.2
15	-3	Bell's Original	Spirits	156.1	-6.6	-11.0
16	-1	Gallo Family Vineyards	Wines	127.3	-4.0	-5.3
17	+1	Bacardi	Spirits	124.5	0.2	0.3
18	-1	Jacob's Creek	Wines	114.4	-8.8	-11.0
19	0	Kronenbourg 1664	Beer	114.0	10.4	10.7
20	0	Beck's	Beer	97.0	-3.7	-3.7
21	+15	Kopparberg	Cider	93.7	38.8	26.2
22	+1	Baileys	Spirits	93.6	0.5	0.4
23	+4	Peroni Nastro Azzurro	Beer	92.5	14.4	11.6
24	+4	Grant's	Spirits	91.8	17.8	13.9
25	+5	Bulmers	Cider	91.5	22.0	16.5
26	-2	Guinness	Beer	91.4	-0.9	-0.8
27	-6	Isla Negra	Wines	89.3	-11.1	-11.1
28	+12	Russian Standard	Spirits	89.2	42.6	26.7
29	+6	Kumala	Wines	89.1	31.8	21.5
30	-4	San Miguel	Beer	87.6	6.7	5.5
31	-9	McGuigan	Wines	87.1	-7.5	-7.1
32	-7	John Smith's	Beer	84.0	-4.5	-4.0
33	0	Lindemans	Wines	83.0	16.9	12.0
34	-5	Wolf Blass	Wines	81.7	6.8	5.2
35	-1	Concha y Toro	Wines	80.8	16.8	11.6
36	+5	Whyte & Mackay	Spirits	71.5	20.4	12.1
37	+2	Captain Morgan	Spirits	69.8	11.6	7.2
38	-1	Stella Artois	Cider	66.3	-0.3	-0.2
39	-7	Magners	Cider	63.8	-10.9	-7.8
40	-2	Tennent's	Beer	63.7	-1.7	-1.1
41	+3	Corona	Beer	62.7	17.2	9.2
42	+14	Barefoot	Wines	55.9	40.8	16.2
43	-12	First Cape	Wines	55.0	-25.8	-19.1
44	-2	High Commissioner	Spirits	54.7	-5.6	-3.2
45	+9	Campo Viejo	Wines	53.1	28.9	11.9
46	+1	Heineken	Beer	52.6	10.3	4.9
47	-1	Courvoisier	Spirits	51.4	-3.4	-1.8
48	+4	Banrock Station	Wines	51.2	15.1	6.7
49	+4	Old Speckled Hen	Beer	49.2	16.4	6.9
50	-2	Three Barrels	Spirits	48.6	4.2	2.0

boosted its appeal with a new variant. "The sun always plays a big part, but Blackberry & Elderflower has been an amazing success," says Diageo off-trade sales director Guy Dodwell. Of Pimm's £7.6m growth, £5.6m came from the new variant, launched in April last year. "The growth has been down to consumers enjoying a twist on classic Pimm's, fantastic execution in-store and new listings."

Deal activity

During last summer's heatwave, several beer and cider brands stepped up deal activity. As a result, average prices for a number of the big brands fell during the three months to the end of July: Carling's average price dropped 4.3%; Kopparberg's 3.5%; Stella Cidre's 3.4%. All enjoyed a strong summer.

Price is clearly still huge for the consumer, particularly for mainstream beer. While the core Carling (5) lager has enjoyed steady growth, thanks in part to a fall in average price, sales of 2.8% abv Carling Zest Citrus have failed to benefit from the overall growth in low-abv fruit beers, remaining flat on volumes down 6.9%, as its average price per litre has risen above those of rivals Foster's Radler and Carlsberg Citrus.

See number one brand Stella's less-than-stellar performance for more evidence of the mainstream lager drinker's continuing price sensitivity. You have to delve deeper than the annual figures for the total brand, which show growth of 0.7% on volumes up 1.7%. During the first half of the year, Stella 4 achieved 16.2% value growth as average price fell 4.1%. Meanwhile, core Stella remained more or less flat until the three months ending 26 April 2014, when value picked up 6.4% on volumes up 10.5%.

While it's conceivable TV ads for Stella over Christmas may have played a part (although both Stella lagers declined in the three months to 25 January), the core Stella's rally in the final quarter appears to have been driven by a 3.7% fall in price, the only reduction for the brand in the year (although this year's late Easter has flattered year on year comparisons too). It seems in the absence of the NPD and big ad campaigns of rivals such as Foster's, drinkers are only prepared to pay so much.

Blended whisky is equally price-sensitive. The Famous Grouse (10), which overtook Bell's Original to become Britain's biggest whisky brand last year, has seen its growth falter as it has been undercut by rivals such as Whyte & Mackay (36) and Grant's (24), whose average price remained more or less flat at £17.78 a litre and dropped 2.1% to £17.73 respectively. Grouse's, on the other hand, has climbed 3.5% to £18.68.

Fierce price promotions, particularly in the run up to Father's Day 2013, played a key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TOP 100 ALCOHOL BRANDS BY VALUE TOTAL OFF-TRADE

RANK	Up/Down	BRAND	CATEGORY	SALES (£m)	CHANGE (%)	CHANGE (£m)
51	▲ +11	**Yellow Tail**	Wines	46.0	33.3	11.5
52	▼ -7	**WKD**	Rtds	45.9	-14.3	-7.6
53	▼ -2	**Lambrini**	Perry	45.0	0.0	0.0
54	▼ -4	**Oyster Bay**	Wines	43.9	-3.1	-1.4
55	■ 0	**Frosty Jack's**	Cider	43.5	9.3	3.7
56	▼ -7	**Martini**	Wines	43.1	-5.5	-2.5
57	▲ +4	**Calvet**	Beer	42.6	20.9	7.4
58	▲ +8	**Coors Light**	Beer	42.5	27.2	9.1
59	▲ +9	**Pimm's**	Spirits	40.7	23.0	7.6
60	▲ +4	**Brancott Estate**	Wines	40.5	20.5	6.9
61	▼ -18	**JP Chenet**	Wines	39.5	-28.3	-15.6
62	▼ -3	**Moët & Chandon**	Champagne	39.1	8.9	3.2
63	▼ -3	**Oxford Landing**	Wines	38.1	7.0	2.5
64	▲ +8	**Villa Maria**	Wines	37.1	21.2	6.5
65	▲ +2	**Black Tower**	Wines	36.7	10.2	3.4
66	▼ -3	**Viña Maipo**	Wines	36.1	6.2	2.1
67	▲ +6	**Absolut**	Spirits	35.9	19.5	5.8
68	▲ +2	**Bombay Sapphire**	Spirits	35.2	9.3	3.0
69	▼ -4	**Southern Comfort**	Spirits	34.6	3.2	1.1
70	▼ -12	**Freixenet**	Wines	34.2	-6.6	-2.4
71	▼ -14	**Teacher's Highland Cream**	Spirits	32.8	-13.9	-5.3
72	▲ +6	**Cobra**	Beer	32.5	19.5	5.3
73	▼ -4	**Smirnoff**	RTDs	31.8	-2.8	-0.9
74	▲ +33	**Rekorderlig**	Cider	29.6	65.4	11.7
75	▲ +5	**Disaronno**	Spirits	29.3	12.3	3.2
76	▼ -1	**Glenfiddich**	Spirits	29.2	2.4	0.7
77	▼ -1	**Arniston Bay**	Wines	29.2	4.7	1.3
78	▲ +13	**Westons**	Cider	29.0	31.2	6.9
79	▼ -2	**Malibu**	Spirits	27.6	-0.9	-0.2
80	▲ +3	**Turner Road**	Wines	27.5	6.2	1.6
81	▼ -2	**Chekov Imperial**	Spirits	27.0	1.2	0.3
82	▲ +2	**Lanson**	Champagne	26.8	10.3	2.5
83	▲ +19	**Tyskie**	Beer	26.2	39.9	7.5
84	▲ +6	**Veuve Clicquot**	Champagne	26.2	16.4	3.7
85	▲ +14	**Torres**	Wines	26.1	32.0	6.3
86	▲ +2	**Jameson**	Spirits	25.4	10.9	2.5
87	▼ -13	**Namaqua**	Wines	25.2	-13.1	-3.8
88	▲ +48	**Desperados**	Beer	25.1	107.4	13.0
89	▼ -8	**Harveys**	Wines	25.1	-3.7	-1.0
90	▲ +2	**Holsten Pils**	Beer	24.6	12.3	2.7
91	▼ -9	**Crabbie's**	Rtds	24.5	-5.7	-1.5
92	▼ -3	**Jägermeister**	Spirits	24.2	6.5	1.5
93	▲ +8	**Berberana**	Wines	23.0	19.8	3.8
94	▼ -9	**Tennent's Super**	Beer	21.5	-9.9	-2.4
95	▼ -2	**Scrumpy Jack**	Cider	21.4	0.0	0.0
96	▼ -2	**Martell**	Spirits	21.3	1.4	0.3
97	▼ -2	**Vladivar**	Spirits	21.3	1.4	0.3
98	▲ +10	**Gordon's**	Rtds	20.8	20.5	3.5
99	▼ -12	**Boddingtons**	Beer	20.4	-12.4	-2.9
100	▲ +13	**Thatchers**	Cider	20.1	25.6	4.1

role in Grant's growth, explains William Grant's off-trade sales director Andrew Clifton. "Father's Day is traditionally the time of year when we sell a lot of blended whisky. In 2013 the blended whisky market was selling around the £10 point (70cl). This year it went up to around £11/£12, so the price of Grant's has now gone up significantly."

Jack Daniel's (14) 22.6% growth on volumes up 25.9% is also partly down to price promotions. "Jack Daniel's had an extremely strong Christmas in 2013, driven by strong promotional activation across the family of brands and excellent visibility in-store," says Bacardi Brown-Forman's American whiskey trade marketing manager Crispin Stephens.

But, of course, it's not all down to price: BBFB says the Jack's Birthday campaign, which runs alongside music gigs through September, and the continuing growth of Tennessee Honey, have also been central to Jack's success. Tennessee Honey, launched in the UK in May 2012, contributed £10.6m to Jack's overall £29.2m growth.

Polarisation of the market

Such premium NPD illustrates the continuing polarisation of the drinks market. Take the launch last August of Smirnoff Gold . The cinnamon-flavoured variant contains 23 carat gold leaf and has fetched an average of £26.38 a litre compared with the £18.85 average across the Smirnoff (3) portfolio. "Consumer demand for premium vodkas continues to grow," says Diageo's Dodwell, pointing to Cîroc Vodka as another case in point.

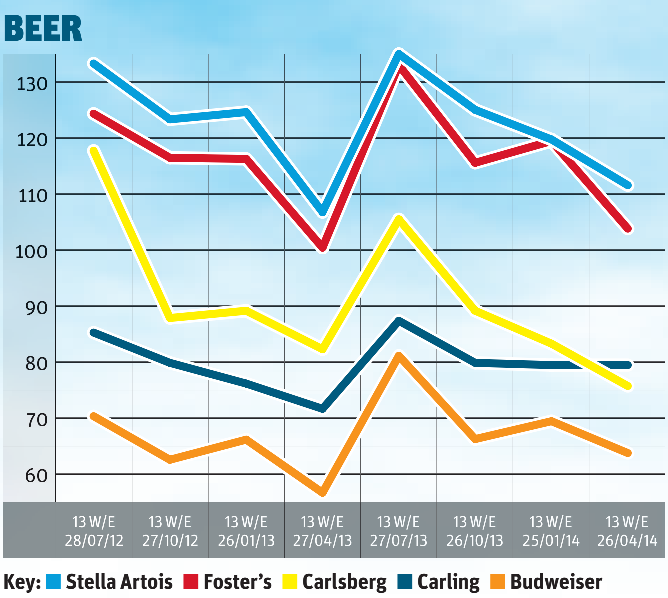
"Cîroc is the fastest-growing super-premium vodka in the UK with flavoured vodkas helping to drive this trend. Cîroc flavours have particularly performed well in the off-trade, where we've seen Cîroc Coconut nearly triple its value share of total vodka, and Cîroc Red Berry gain nearly a 1% share of total vodka over the last 12 weeks."

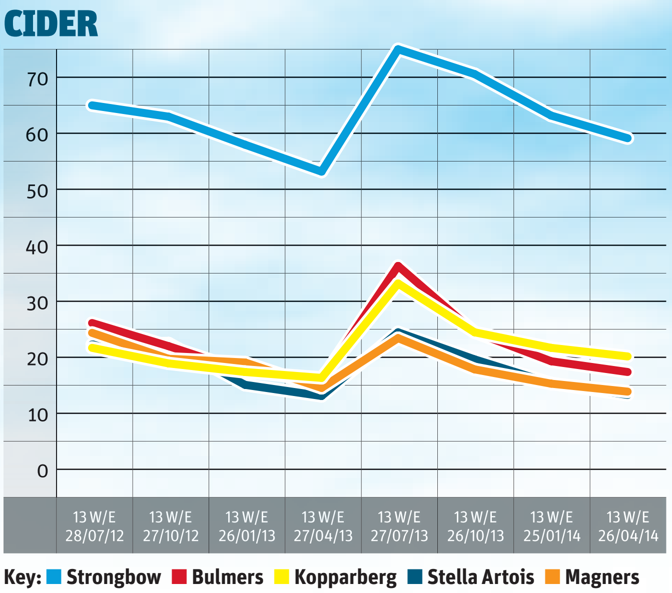
A push to the posher end makes perfect sense in light of the fierce competition at the cheaper end of vodka. Russian Standard (28) has enjoyed 42.6% growth, thanks partly to featured space promotions that have seen its average price stay more or less flat at £17.73 a litre (in comparison, Smirnoff Red Label's average price has risen 3% to £18.70 a litre).

Expect even fiercer price competition as William Grant's plans for Green Mark (133) vodka unfold. Green Mark is already cheaper than any of the top 100 vodkas at £16.88 a litre. And it could well get cheaper.

"Green Mark operates in the area of Smirnoff Red Label," explains Clifton. "We've moved the abv from 40% to 38% – we've sold through the remaining stock of 40% abv in the past few weeks and are rolling out the 38% for two reasons: for the taste profile and

Summer spike of 2013 showed changed fortunes of cider and sweeter lagers





because it allows us to get the right price point, giving retailers an attractive margin and allowing them to compete with the discounters."

The Original variant of Baileys (22), which has seen sales fall 2.9% on volumes down 2.3%, has also found the going tough. That Sainsbury's chose to promote its Taste the Difference Irish Cream during the key Christmas period, rather than Baileys, surely had an impact, although the brand's first TV campaign in five years helped mitigate the loss. But all is not lost: the October launch of Baileys Chocolat de Luxe is yet more proof of polarisation and of brands offering higher margins with more premium products. The variant, which comes in 50cl as opposed to the standard 70cl and contains 15% abv rather than Original's 17%, has racked up £5m since launch. Crucially, on average de Luxe has fetched more than double the price per litre of Original, selling for £30.71 compared with £15.18 for Original.

The astronomical growth of fruit ciders is further proof of premiumisation. The average price of the 10 ciders in this year's top 100 was £2.20 a litre. Rekorderlig and Kopparberg (21) fetch £3.79 and £3.63 respectively, justifying their higher prices with a steady flow of exotic NPD – the former having launched a passion fruit variant in March last year, the latter Cloudberry and Elderflower variants last month – and slick marketing aimed at younger drinkers, who are prepared to pay considerably more for the right product.

The most successful launch of the year, Strongbow Dark Fruit, falls into this category. Since launch in June last year, Dark Fruit has racked up a massive £32.7m. That's almost double the combined sales of all other top 100 NPD of the past year combined. Dark Fruit, which carries a 19.4% premium over the rest of the Strongbow (8) portfolio and was the subject of a summer-long ad campaign last year, is the only Strongbow variant in growth.

These fruit ciders are luring drinkers away from wine with the promise of exotic variants, sweeter flavours and lower abvs. "Wine is in decline as younger drinkers under 25 turn to lower-alcohol, fruit-based ciders, craft beers and pre-mixed cocktails," says Bibendum's Quinn. "Meanwhile low-alcohol wine is still very much a work in progress."

Indeed. Nielsen figures for the two years to 21 June show the market for wines at 5.5% abv or below has slumped 5.6% to £36.8m on volumes down 11%. Brands such as First Cape (43), down 25.8% in value, have borne the brunt of this decline: its Café Collection line-up of low-abv wines is down 58%.

Intense competition from own label and retail exclusive wine brands (not covered in this report) has also weighed down the performance of Britain's biggest wine brands, although some have managed to buck this trend with big investment and a move to more premium offerings. Hardys (7) is a case in point, its 8.9% value growth on volumes up 3.6% coming off the back of a £10m investment aimed at playing up quality cues, a packaging redesign and a three-year sponsorship deal with England cricket.

Investment like this could well keep Britain's biggest alcohol brands growing. Whatever the weather throws at them.

CHEAPEST BY ABV

	£/ABV%	Y-O-Y %
Frosty Jack's	**0.19**	**10.0**
Tennent's Super	**0.33**	**3.4**
Scrumpy Jack	**0.37**	**7.2**
High Commissioner	**0.44**	**6.6**
Glen's vodka	**0.46**	**5.9**

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 26 April 2014. 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.*

1 (1)

Stella Artois

SALES: £492.4m **GROWTH:** +0.7%

AB InBev stablemate Budweiser has been all about the football this year – but Britain's biggest alcoholic drinks brand has been playing a different game.

Two games, in fact, with Stella Artois becoming official lager of the Wimbledon tennis tournament and sponsoring The Open golfing championship. The new deals are part of Stella's ongoing campaign to align itself with high-profile events, a roster also including the Cannes Film Festival and the Kentucky Derby.

"At Stella Artois we have a huge appreciation for events that celebrate a real sense of occasion and excellence," says Stella Artois marketing manager Phil Pick. "We're delighted to be a part of two of the UK's biggest sporting events."

An on-pack promotion that kicked off in April gave consumers the chance to win tickets to Wimbledon and The Open, as well as one of 50,000 special edition Stella Artois chalice glasses.

Glassware was also a theme for 2013, when Stella gave away 450,000 chalices through in-store promotions and online giveaways. "We have focused on elevating the at-home experience for consumers," says AB InBev off-trade sales director Simon Harrison.

The brand's Christmas 2013 activity included the UK debut of its L'Anniversaire advertising push in a three-week campaign supported by social and digital activity. The final frame of the advert showed a seasonal limited-edition bottle design, available exclusively in Sainsbury's from November.

But despite the festive activity, sales of Stella were weaker this winter than they had been the previous year, with value down 3.9% year on year [13 w/e 25 January 2014].

The spring, however, brought better news for the brand, with value up 4.4% year on year [13 w/e 26 April 2014]. This growth was accompanied by a slight drop in average price compared with the same period a year ago – suggesting an increase in promotional activity – though Stella has been looking to shift away from deep promotions through value-adding activity such as its glassware giveaways and limited-edition packs.

As part of Stella's ongoing campaign to sponsor high-profile events – including the Cannes Film Festival and the Kentucky Derby – it has sealed deals with the Wimbledon tennis (above) and Open golf championships

"Our promotional participation was at too high a level and we've taken the strategic choice to significantly bring that down," AB InBev UK and Ireland president Inge Plochaet told The Grocer last August. "Of course, that comes with consequences such as revenue, market share and volume in the short term, leading to something more sustainable in the long term," she added.

This may be one reason for the relatively sluggish performance by the brand compared with some of its major lager rivals – though, in line with the overall market, Stella's 0.7% sales growth is well up on the 4.6% slump recorded for the brand a year ago. The growth has been driven entirely by the core Stella Artois lager – with value sales of brand extension Stella Artois 4% static.

And, despite AB InBev's decision to reduce promotional activity, pricing isn't entirely under its control. Across the full 12-month period covered by this report, the average price of Stella has fallen year on year – though the drop of one pence per litre to £2.19 is less than the decline in the price of some of its rivals, notably standard Carlsberg and Carling.

One brand to have increased average price – albeit fractionally – is closest rival Foster's, which has also succeeded in closing the gap between the two brands, from £30m this time last year to £20m. The average price of Stella Artois 4%, meanwhile, has fallen 3p per litre to £1.86.

If Stella is to convince drinkers that it's worth paying more for, it might have to take a leaf out Foster's book and innovate more. The last launch for Stella (as a lager at least) was Stella 4, in 2008.

2 (2)

Foster's

SALES: £472.7m **GROWTH:** +3.1%

In a market as competitive as mainstream lager, diversification is one way of adding value – and few have embraced diversification with the gusto of Foster's.

Off-trade sales have grown £14.3m in the past year – but only £3m of that has been generated by the £422m core Foster's lager.

The bulk of the growth has come from Foster's Radler, which has risen from less than a million in total off-trade sales a year ago to £9m.

It's not just the extra sales that come in handy: brand owner Heineken is likely to be making better margins on Radler – a 2% abv blend of Foster's lager and lemon – than on standard Foster's as the duty burden on beers at 2.8% abv or lower is considerably less than on standard lager.

Since Radler is selling at a higher average price than standard Foster's – at £2.06 a litre vs £1.76 – it's no wonder Radler extended this year with an alcohol-free version and new flavour lime & ginger. It and the original version are now available in bottles and 440ml cans – the latter having been added to the Radler range for the first time. These rolled out in March alongside Foster's Radler 0.0% abv, a bottled non-alcoholic Foster's and lemon mix, as Heineken continues to increase its presence in the low and no-alcohol market.

Recent consumer research suggested shoppers might be selecting products like Radler – and other lower-abv lagers – not only because of the reduced alcohol content but because of the flavour.

"If consumers are opting for our products because of taste it's a testament to the work we've done," says Heineken off-trade MD Martin Porter.

Heineken has also added value to the Foster's brand with Foster's Gold. The premium brand extension launched three years ago and is now worth £41.6m.

Growth has slowed compared with this time last year but is still a respectable 6.3% by volume – while value is up 6.8%, suggesting that the extra £2.6m in sales has not come at the expense of margin. Indeed, the premium on Gold leaves Radler in the shade, selling for £2.44 a litre on average – more than 20p per litre higher than Stella Artois and 4p higher than Kronenbourg 1664.

That's not to say standard Foster's has been ignored. It still accounts for the lion's share of marketing investment, and Heineken is looking to boost consumer perception of the quality of the core lager with the introduction of a new marketing campaign and packaging to highlight the brand's origins in Australia in 1888.

britain's 100 biggest booze brands

3 (4)

Smirnoff

SALES: £399.5m **GROWTH:** +6.7%

A golden year. Sales leapt £24.9m as the off-trade shifted an extra 700,000 litres thanks to NPD, extra ad spend, new price-marked packs for c-stores and new signature serves.

The August launch of premium Smirnoff Gold has contributed £5.7m to total sales. Diageo off-trade sales director Guy Dodwell says the cinnamon flavoured variant has more staying power than other flavours (lime, green apple and blueberry have been in decline for the past two years): "It isn't just another flavoured vodka.

With real, edible 23 carat gold suspended in every bottle, it's completely new to the category."

Actually, there are several vodkas containing gold and Polish brand Gold Wasser claims to be from a 16th century recipe. But it is certainly the biggest of its type in Britain.

4 (3)

Carlsberg

SALES: £353.8m **GROWTH:** –6.2%

Carlsberg's new CEO James Lousada – who joined from Accolade Wines in January – has promised "exciting, customer-focused" plans for the business.

These presumably include turning around its flagship brand, which has been outperformed by the overall beer category and many major rivals. This, suggests Carlsberg, is because the data period for these rankings does not stretch to the middle of the year, where much of its 2014 activity has been weighted. It expects its

volumes to have improved by the end of this month.

Marketing plans include the Born To Be Chilled campaign, which takes in the £7.2m Carlsberg Citrus sub-brand – the one part of the Carlsberg portfolio in growth – along with San Miguel and Tuborg.

5 (5)

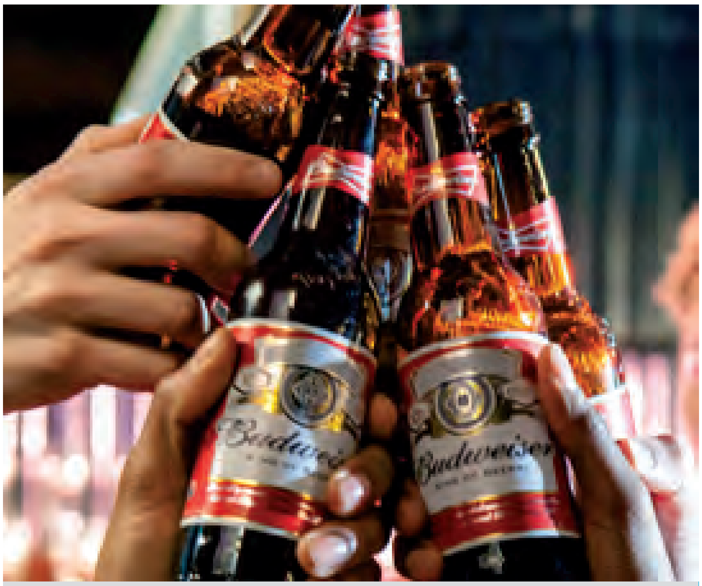
Carling

SALES: £325.9m **GROWTH:** +4.3%

Carling has fully embraced consumer demand for lighter and sweeter drinks, last month rolling 2% abv Fruit Coolers across the off-trade following a successful trial in Asda.

Available in lemon and grapefruit, the drinks contain a blend of fruit juice and lager – rather than just the hint of fruit found in Zest, Carling's 2.8% abv sub-brand. Sales of Zest, expanded with Red Berries flavour in June, have risen to c£12m in the past year driven by extensions including Ginger and Winter Berries.

Meanwhile, volume sales of core Carling lager have risen 9% year on year, with a decline in average price suggesting this has been driven by promotional activity. Brand owner Molson Coors recently announced it will give away 500,000 Carling pint glasses over the summer.



6 (7)

Budweiser

SALES: £280.0m **GROWTH:** +9.8%

Football has – not surprisingly – been the focus of official World Cup beer Budweiser in the past six months.

With Budweiser outperforming most other major beer brands, and our data covering the period before the tournament kicked off, the performance seems all the move impressive as, at a time when so many brands have launched myriad extensions, Bud is essentially still a one-product portfolio in the UK (with the exception of the declining Bud 66 sub-brand, which accounts for just over 1% of total Bud off-trade sales).

With its three-year sponsorship of the FA Cup drawing to a close in 2014, most Bud activity has been centred on global World Cup campaign Rise As One, which made its UK debut in March with TV and outdoor ads. Budweiser also introduced a limited-edition aluminium bottle featuring the World Cup trophy.

Budweiser also ran Open Trials that gave thousands of amateur footballers the chance to play at Wembley Stadium in front of scouts. Football legends and former managers David Ginola, Ray Parlour, Steve Clarke and Alex McLeish selected the best players, who were sent to Rio to play in the Budweiser Cup 6v6 tournament there. A documentary telling the story of Open Trials was broadcast on BT Sport on FA Cup Final day and is now available on YouTube.

But it hasn't all been about football. In fact, another major piece of Budweiser activity was about as far removed from footie as you can get.

For Christmas 2013 the brand launched Knitbot – a tweet-powered knitting machine that responded to hashtag mentions to knit Christmas jumpers for designated drivers to wear during the festive season. This was accompanied by limited-edition Christmas jumper-themed packaging, with a percentage of proceeds from an exclusive pack available in Asda going to charity RoadSafe.

Budweiser has suffered a small drop in average selling price across the past 12 months, with volume growth slightly ahead of value, though it continues to sell at a considerable premium over many of its rival mainstream lager brands.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britain's 100 biggest booze brands

7 (6)

Hardys

SALES: £278.5m **GROWTH:** +8.9%

With over £10m being pumped into Hardys by its private equity backers, the UK's number one wine brand is flying high.

The last year has added £22.8m in extra sales, with volumes up 3.6%, as brand owner Accolade has used new branding and greater tiering to reduce reliance on promotion and to play up its quality cues.

New packaging was rolled out in September to reflect the different tiers, followed by a £2.4m outdoor campaign and a three-year sponsorship deal with England Cricket.

Other initiatives included a celebration of Australian Chardonnay – complete with a pop up bar in London's West End with ex-Blur cheesemaker Alex James – and a new direct-to-consumer website 1853 Club selling higher price rare and limited stock.

8 (9)

Strongbow

SALES: £265.8m **GROWTH:** +12.6%

Britain's biggest cider brand added another string to its bow last year – and hit the bullseye.

Despite being on retailers' shelves for just 10 months, Strongbow Dark Fruit has already racked up £32.7m in off-trade sales.

It's a stunning performance that has driven virtually all growth in the brand, with the brand's Original flavour down 1.9% by value to £215m and sales of Strongbow Pear dipping fractionally.

The launch has tapped directly the flavoured cider boom as consumers developed an appetite for berry flavours. It also coincided with fantastic weather last summer that helped Dark Fruit achieve £12m sales in its first few months.

Speaking to The Grocer earlier this year, David Forde, MD at Strongbow owner Heineken, described Dark Fruit as "the number one fmcg launch of 2013."

"It was a phenomenal success," he said. "We have extended Strongbow in a way that is true to the essence of the brand, while delivering on consumers' desire for variety, accessibility and a slightly sweeter taste profile."

The performance of Dark Fruit – singled out by buyers as an "excellent" launch – was one of the key reasons Heineken was named Branded Supplier of the Year in last month's The Grocer Gold Awards.

Heineken is hoping to repeat the success of Dark Fruit with Strongbow Citrus Edge – a 4% cider with lemon and lime – that rolled into the off-trade from mid-March and has been supported with a £5m campaign, part of a £20m investment across the brand.

Advertising for Strongbow Citrus Edge has been designed to piggyback off the success of Dark Fruit, and highlights the contrasting and complementary nature of the two variants.

"We think Citrus Edge will be at least as successful as Dark Fruit," says Heineken off-trade MD Martin Porter.

Heineken is investing £58m in its Hereford plant to bring all its cider production – including Bulmers and Scrumpy Jack – under one roof. With the move designed to lead to even more innovation in "flavours and pack types", it's a safe bet Strongbow will be gaining more strings in the near future.

9 (8)

Blossom Hill

SALES: £ 248.3m **GROWTH:** –1.0%

The rate of Blossom Hill's decline has slowed in the past year (the brand was down 4.4% a year ago), but volumes still fell 3.5% as prices rose.

Strong growth in the brand's sparkling wines and the low-abv Vie range, which rose 229% to £4.9m, were not enough to offset the decline in Blossom Hill's core offerings. "We've changed our focus and pulled away from highly promoted lines, which performed less strongly, as we want to build value," says head of commercial planning James Peterson.

To this end, two 11% abv Sun-Kissed wines in red and white rolled out in May, aimed at attracting drinkers who prefer a lighter, fruitier style. They are being supported by a wider £2.1m marketing spend, including a new TV ad airing this week [14 July].

10 (10)

The Famous Grouse

SALES: £189.4m
GROWTH: –2.2%

A year ago we revealed how Grouse had knocked Bell's off its perch as Britain's biggest whisky brand. But after several years of growth, sales have sunk by £4.3m in the past 12 months as we've glugged 600,000 (5.5%) fewer litres.

Still, all is not lost. Distributor Maxxium claims Grouse is outperforming the wider blended Scotch market thanks to strong price promotions at Christmas and an initiative allowing drinkers to personalise labels online.

So far 40,000 have taken part in the scheme, which has been extended into the summer.

Bucking the overall decline for Grouse, peated premium variant Black Grouse has achieved value growth of 5%, thanks partly to a campaign fronted by UK explorers.

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The price break for Premium Wines is + £6.50 to £8.49*

*Off Trade average price per 75cl 12.10.13 **Source Nielsen MAT to 29.03.14

14 (16)

Jack Daniel's

SALES: £158.3m
GROWTH: +22.6%

Jack's beekeepers must be due a bonus. After hitting the UK in May 2012, Tennessee Honey's sales have almost doubled to £21.9m in the past year, accounting for more than a third of the total brand's growth. While the wider whisky category is on the rocks, Jack has cashed in on the vogue for Americana to attract younger drinkers: Bacardi Brown-Forman Brands says it is particularly popular with drinkers aged 18 to 29.

"This can largely be attributed to the current demand for sweeter tastes and flavours, enabling the brand to leverage connections with a new audience of typically non-whiskey drinkers, who prefer serves with sweeter flavour profiles," says BBFB American whiskey trade marketing manager Crispin Stephens.

The buzz doesn't end there. The core Tennessee Whiskey has added £17.1m to its top line, with premium variants Single Barrel and Gentleman Jack surging 38.2% to £5.7m as Brits sunk 1.2 million (25.9%) more litres of shop-bought Jack in the past year.

Big advertising investment and promotions have been key, adds Stephens. The average price of Jack has dipped 2.6% over the past year as a result of gift deals around Christmas and Father's Day and featured space promotions. If Jack keeps it up, he could soon overtake Grouse as Britain's biggest whisky.

11 (11)

Glen's Vodka

SALES: £177.0m **GROWTH:** –3.5%

At £17.35 a litre, it's still cheap. But hiking the price from £16.38 means it's no longer the cheapest spirit in our top 100 – Vladivar (97) has stolen that crown – and contributed to an 8.9% volume decline.

12 (13)

Echo Falls

SALES: £161.0m **GROWTH:** +4.1%

One of the few US brands in volume growth (up 2.6%), Echo Falls continued last year's fashion theme by sponsoring the Clothes Show Live. A new bottle design for the core range emphasises premium cues.

13 (14)

Gordon's

SALES: £160.0m **GROWTH:** +4.5%

Clear as a hermit's diary; crisp as a vicar's laundry. So says Philip Glenister in the Gordon's TV ads. The core offering was down 1.5%, but Crisp Cucumber, launched March 2013, racked up £4.1m.

15 (12)

Bell's

VALUE: £156.1m **GROWTH:** –6.6%

Blended whisky is stuck between a rock and a hard place. Bell's has gone from being one of the cheapest blended Scotches to the most expensive as rivals have ramped up deal activity.

16 (15)

Gallo Family Vineyards

SALES: £ 127.3m **GROWTH:** –4.0%

Gallo's decline has slowed marginally (a year ago it was down 5.2%). The brand is ramping up activity on lighter styles with the addition of the 5.5% abv Summer Rosé and a pink moscato in May.

17 (18)

Bacardi

SALES: £124.5m **GROWTH:** +0.2%

As Captain Morgan (37) sails up our ranking, Bacardi's looking washed up. It blames the waning popularity of white rum, noting respective category growth of 15% and 16% for golden and spiced.

18 (17)

Jacob's Creek

SALES: £114.4m **GROWTH:** –8.8%

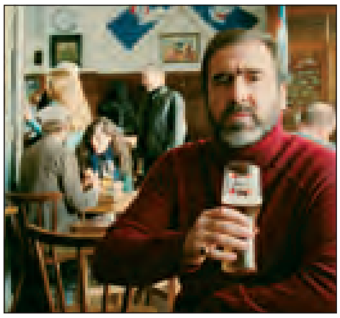
Sales continued to slide for Pernod Ricard's Australian brand, despite a revamp and the addition of new Italian varietals – a Fiano and Sangiovese – to its Classics range and a pinot grigio to Cool Harvest.

19 (19)

Kronenbourg 1664

SALES: £114.0m **GROWTH:** +10.4%

Brand owner Heineken cried foul when ad watchdogs banned a Kronenbourg ad starring Eric Cantona, and succeeded in getting the ruling overturned. Sales are up more than £10m year on year.

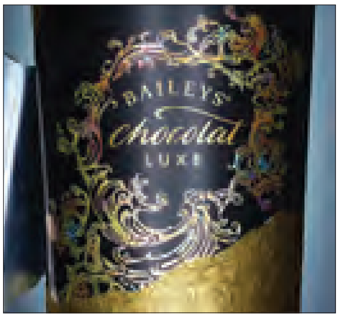


20 (20)

Beck's

SALES: £97m **GROWTH:** –3.7%

Alcohol-free Beck's Blue is the only variant of any scale in growth in the Beck's line-up. The core offering and Vier have seen significant falls in volume, the latter by 2.2 million litres, or 18.6%, after a 2.5% price hike.



22 (23)
Baileys
SALES: £93.6m **GROWTH:** +0.5%
With the launch of Baileys Chocolat de Luxe last October, Diageo has convinced some that boozy Belgian chocolate is worth double your average Irish cream. The variant's racked up £5m since launch.

23 (27)
Peroni
SALES: £92.5m **GROWTH:** +14.4%
If you want Italian style, you have to pay for it. This could be why Peroni is being consumed in such large quantities, despite its price rising 2.7% to a hefty £3.62 per litre. It must be those Italian models in the ads.

24 (28)
Grant's
SALES: £91.8m **GROWTH:** +17.8%
Of the six Scotch blends in the top 100 only High Commissioner (44) is cheaper than Grant's, whose average price fell 2.1% to £17.73/litre due to promotions. Core Family Reserve has driven growth.

25 (30)
Bulmers
SALES: £91.5m **GROWTH:** +22%
Overall sales of Bulmers are booming – although apple and pear are in decline. Its latest NPD – 2.8% abv Five Fruit Harvest and Indian Summer – could spearhead a new category of lower-abv branded cider.

26 (24)
Guinness
SALES: £91.4m **GROWTH:** −0.9%
The rate of decline in Guinness sales has slowed in the past year, thanks to a £12.7m marketing spend including its Made of More TV ads and a renewed agreement as the official beer of England rugby.

27 (21)
Isla Negra
SALES: £89.3m **GROWTH:** −11.1%
Sacrificing volume to establish a more "sustainable" shelf price contributed to a 2.3 million litre (14.7%) decline. But listings are now growing as a new consumer campaign for this Chilean wine brand kicks in.

28 (40)
Russian Standard
SALES: £89.2m **GROWTH:** +42.6%
As rivals push posher variants, Standard's going for the value end. Promotions have kept the brand's average price more or less level at £17.66 a litre over the past year, undercutting Smirnoff Red by 6.6%.

29 (35)
Kumala
SALES: £89.1m **GROWTH:** +31.8%
Kumala has bounced back from last year's decline, despite a 2.3% rise in price. Growth in distribution, PoS activity and deals have helped. The decline of South African rival First Cape (43) can't have hurt either.

30 (26)
San Miguel
SALES: £87.6m **GROWTH:** +6.7%
San Miguel's growth is partly down to the rising popularity of so-called 'world lagers.' The Spanish brand's low abv extension Fresca, launched in 2012, was its top performer, with sales up 12.1% to £11.8m.

21 (36)
Kopparberg
SALES: £93.7m **GROWTH:** +38.8%
Off-trade sales of the king of the flavoured ciders have grown £26.2m in the past 12 months as Brits show a growing appetite for sweeter drinks.

The performance – which has made Kopparberg one of the UK's top 10 beer & cider brands – has been driven by the Mixed Fruit flavour that accounts for almost half the total sales of the brand and has grown £14.9m in its own right.

Sales have been strong all year but last year's hot summer was a boon for Mixed Fruit, up 78% year-on-year from June to August. A stylish TV ad push flagged up the flavour and refreshment.

In percentage terms, the fastest mover has been the Strawberry & Lime variant, which has risen 63.1% and brought an additional £10.9m in sales to the brand.

Kopparberg extended its line-up last year with Spiced Apple, which was given a novel push in the run up to Christmas when Londoners were offered the chance to take a ride through Kennington Park on a husky-drawn sled.

This year, the biggest sellers are again being backed with TV ads while the flavours Kopparberg describes as its more 'eclectic' variants – Elderflower & Lime and Cloudberry – are currently being supported with an outdoor, experiential, social and press campaign. "It's our biggest, most focused spend to date," says marketing head Rob Calder.

38 (37)

Stella Artois Cidre

SALES: £66.3m **GROWTH:** −0.3%

Three years of explosive growth in Cidre value sales came to a grinding halt this year, as flavoured ciders captured the attention of many drinkers. Volume sales have risen slightly, however, driven by sales of multipacks over single bottles.

And with all the value growth in the brand over the past 12 months generated by Cidre's pear variant, it was a matter of when – not if – the brand would be extended into further flavours.

That happened in May, when AB InBev unveiled Stella Cidre Raspberry in packs of four and eight 330ml bottles, which the brewer expects to appeal more to women, as well as 500ml single bottles. The launch also saw a refreshed look roll out across the brand.

"The fruit cider market has seen strong growth, and Stella Cidre Raspberry brings a sophisticated new variant to the market alongside Stella Artois Cidre Apple and Pear," says AB InBev off-trade sales director Simon Harrison. "With this launch, Stella Artois is further demonstrating its commitment to and investment in the cider category."

AB InBev is backing Cidre with TV and outdoor advertising, and the profile of the brand will also be raised by its rollout on draught in May, initially through "premium on-trade outlets". And the brand is extending its reach abroad, too, rolling out nationally across the US this January.

31 (22)

McGuigan

SALES: £87.1m **GROWTH:** −7.5%

There's been a reversal in McGuigan's fortunes, despite what it says has been the wine brand's most successful competition ever – a trip to Sydney. A new sub-range will launch this summer.

32 (25)

John Smith's

SALES: £84.0m **GROWTH:** −4.5%

Despite the traditional canned ale market being in long-term decline, it is still a large and relevant market for a lot of consumers, and Heineken's John Smith's, at £84m, is still a powerhouse within it.

33 (33)

Lindemans

SALES: £83m **GROWTH:** +16.9%

It's the sunshine that makes it, apparently. This was the title of a brand campaign last year, which began again this June. It's working: sales are up £12m, though it's worth noting prices have stayed more or less flat.

34 (29)

Wolf Blass

SALES: £81.7m **GROWTH:** +6.8%

Treasury put two GB cricketing heroes, Michael Vaughan and Andrew Strauss, into bat in a multimillion pound sponsorship of the Ashes last year, marking a "step change" in visibility for the Aussie wine.

35 (34)

Concha y Toro

SALES: £80.8m **GROWTH:** +16.8%

The Wine Legends ad and the new Devil's Collection range under the Casillero del Diablo sub brand helped give Concha y Toro an £11.6m boost. Volumes are up 7.8%, reflecting the wider focus on pricier offerings.

36 (41)

Whyte & Mackay

SALES: £71.5m **GROWTH:** +20.4%

We've glugged down 600,000 (19.9%) more litres of Whyte & Mackay in the past year as the brand ramped up promotional activity. Look no further than Grouse (10) and Bell's (15) for the victims of its success.

37 (39)

Captain Morgan

SALES: £69.8m **GROWTH:** +11.6%

The Captain strode on to our screens last September as part of a Live Like a Captain push. And we've knocked back an extra 300k litres (8.2%) of Spiced in the past year, though the standard rum is in decline.

39 (32)

Magners

SALES: £63.8m **GROWTH:** −10.9%

The over-ice serve transformed the market but Magners sales have cooled since its 1990s heyday. Owner C&C Group has this year backed the cider with a text-to-win promotion and promises a raft of NPD.

40 (38)

Tennent's

SALES: £63.7m **GROWTH:** −1.7%

At least Tennent's rate of decline is slower than last year's. A year ago the brand was down 4.6%. C&C Group is hoping the May launch of Lemon T will help turn things around by tapping the low abv, fruit beer trend.

42 (56)
Barefoot
SALES: £55.9m **GROWTH:** +40.8%

Passing the one million case milestone in 2013, Barefoot has ramped up its digital marketing and adopted Kate Humble as the new face of its beach rescue projects. A new ruby moscato was added in April.

43 (31)
First Cape
SALES: £55m **GROWTH:** –25.8%

First Cape's lower-abv wines have haemorrhaged sales – and SKUs – at an accelerated pace this year (down 58% to 5.7m), with its contribution shrinking from 18% to 10% of total sales; 22 lines were cut to six.

44 (42)
High Commissioner
SALES: £54.7m **GROWTH:** –5.6%

Being the cheapest Scotch in the top 100 hasn't stopped High Commissioner from sinking like a stone. It's sold for an average of £17.64 a litre over the past year, mostly through independent retailers.

45 (54)
Campo Viejo
SALES: £53.1m **GROWTH:** +28.9%

The Live Uncorked campaign, for which Viejo teamed up with street artists Remed and Okudu, helped drive £11.9m growth, as did a focus on pricier Reserva Rioja. Higher tier wines will again be a key focus for 2014.

46 (47)
Heineken
SALES: £52.6m **GROWTH:** +10.3%

Heineken kicked off 2014 with the Sunrise TV ad, part of its Dance More, Drink Slow campaign advising partygoers to pace themselves. It also extended its Champions League sponsorship for four more years.

47 (46)
Courvoisier
SALES: £51.4m **GROWTH:** –3.4%

Courvoisier may be courting the hip young things of Shoreditch with a widening array of on-trade cocktails but Cognac just isn't cool in the off-trade. The core VS lost 3.1% of its value and the pricier VSOP lost 5.3%.

48 (52)
Banrock Station
SALES: £51.2m **GROWTH:** +15.1%

Banrock Station's core wines did well but sparkling sales collapsed 64.4%, while the new lower abv sub-brand, Banrock Station Light, failed to take off, despite gaining listings in Tesco.

49 (53)
Old Speckled Hen
SALES: £49.2m **GROWTH:** +16.4%

We've supped our way through 2.3 million (15.2%) litres more Speckled, Golden and Crafty as the premium bottled ale market has thrived. In April Greene King launched a fourth Old Hoppy variant.

50 (48)
Three Barrels
SALES: £48.6m **GROWTH:** +4.2%

A marketing rethink, starting with a 2012 pack redesign, is paying off as £2m extra sales testify. It has encouraged drinkers to use brandy as a base for at-home cocktails and as a cooking ingredient.

41 (44)
Corona
SALES: £62.7m **GROWTH:** +17.2%

Corona is a beer brand that really shines in the summer (volumes surged 44.7% last summer, for example). But there are clouds on its horizon.

Molson Coors, exclusive UK distributor of the AB InBev-owned brand, has warned there may be a shortage of stock in the UK this year – announcing in May that it had "taken the decision to proactively manage Corona stock until further notice".

AB InBev says the shortage was the result of increased demand compared with same the same period last year and constraints on supply of glass – with insiders claiming the Mexican brewery had been suffering a shortage of bottles.

With world lager continuing to grow and Latin American culture all the rage following the World Cup, it's hard to imagine a worse time for Corona to face supply issues.

Sales have grown just over £9m in the past 12 months but more than half that growth came in the 13 weeks to the end of July, highlighting how key the summer months are to such a brand. Conversely, brand growth slowed to just 5.8% in the winter [13 w/e 25 January 2014].

And should consumers have difficulty finding Corona on shelf, there are similar world beer brands suited for drinking in the sunshine that might fill the gap – not least fellow Mexican Sol, which has increased value sales by almost a third in the past year (see Bubbling Under p50).

59 (68)

Pimm's

SALES: £40.7m **GROWTH:** +23.0%

Last year's scorching summer played a part in Pimm's explosive growth. But it's not all down to the sunshine. In April 2013, Diageo launched a blackberry & elderflower variant, which has gone on to rack up an impressive £5.7m, making it one of the most successful new drinks launches of the past year.

"The sun always plays a big part, as Pimm's is a fantastic and popular drink for summer occasions and parties," explains Diageo off-trade sales director Guy Dodwell. "However, the launch campaign around blackberry & elderflower has really helped to drive further results for the brand. The growth of blackberry & elderflower is down to a mixture of consumers enjoying a twist on classic Pimm's, fantastic execution in-store alongside Pimm's No. 1, and new listings with retailers."

Diageo is looking to keep up the pace this year with ramped up advertising, adds Dodwell: "Our new campaign featuring illustrations by The Guardian's illustrator Stephen Collins (see right) showcases the appeal of Pimm's, no matter the occasion."

To drum home the message the brand is using the slogan 'It's pretty much never not Pimm's O'Clock.' They're nearly right. Sales of Pimm's Winter Cup, launched in 2005, have plummeted 31.6% to just £600,000, suggesting the brand is still seen primarily as a summer drink.

51 (62)

Yellow Tail

SALES: £46m **GROWTH:** +33.3%

New listings, wider distribution and a sampling campaign in a VW van boosted the brand, even though average price rose 11.9%. "Awareness and trial have worked," says Yellow Tail. "But we believe it can do more."

52 (45)

WKD

SALES: £45.9m **GROWTH:** –14.3%

Other alcopops will be well jel when they hear of WKD's three-series sponsorship of TOWIE. The show is popular with the brand's target younger drinkers. Whether it can reverse a £7.6m decline is another question.

53 (51)

Lambrini

SALES £45m **GROWTH:** 0%

New variants, brighter designs and a tie-in with Cheeky Bingo failed to ignite sales. Volumes fell 4%. And in April the brand had its knuckles rapped by the ASA for ads that intimated alcohol is key to social success.

54 (50)

Oyster Bay

SALES: £43.9m **GROWTH:** –3.1%

Value sales of the core Oyster Bay still wine range are down 4.8% to £42m, with volumes down 14.3% following a significant hike in average price. Sparkling sales were up 58.3%.

55 (55)

Frosty Jack's

SALES: £43.5m **GROWTH:** +9.3%

Despite a 10% hike in average price to £1.45 a litre, Frosty is still the cheapest brand in our top 100 in terms of price per unit. Considering the stick high-strength ciders get, a 0.7% slip in volumes isn't bad at all.

56 (49)

Martini

SALES: £43.1m **GROWTH:** –5.5%

Efforts to encourage younger drinkers to mix Royales at home (Martini Bianco with Martini Prosecco, lime and mint) have missed the mark. Neck collars on Bianco are now pushing the message.

57 (61)

Calvet

SALES: £42.6m **GROWTH:** +20.9%

New listings for Calvet's Bordeaux chateaux wines led to good growth for the brand in 2012/13. It continues to climb by offering an affordable alternative to New Zealand sauvignon blancs.

58 (66)

Coors Light

SALES: £42.5m **GROWTH:** +27.2%

Jean-Claude's doing a Damme good job for Coors Light, although sales growth is slower than last year's 85.5%. In a new social media push, consumers share their #Dammecold experiences.

60 (64)

Brancott Estate

SALES: £40.5m **GROWTH:** +20.5%

Increased investment in the Marlborough brand has paid dividends. A new push launched in April, while NPD includes a Classic sauvignon gris, a new mid-price tier and a 9% abv Brancott Estate Flight.

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*Nielsen Scantrack, Cider Category, Value Sales, MAT to 21.06.14
†CGA Packaged Cider Report, MAT to 25.01.14

68 (70)

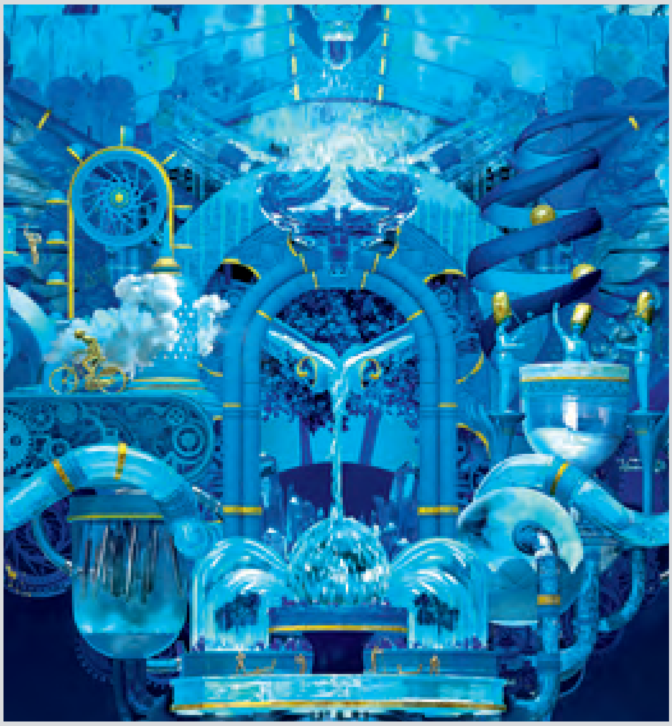
Bombay Sapphire

SALES: £35.2m
GROWTH: +9.3%

The growing popularity of premium gin continues to be a tonic for Bombay Sapphire. Three years after the launch of its Ultimate G&T campaign, Bacardi Brown Forman says the spirit, still made to a 1761 recipe, is now worth over £111m in the UK.

While the on-trade evidently represents the lion's share of sales, ongoing promotions are doing their bit, including a summer-long campaign enabling shoppers to buy a balloon glass alongside the spirit in the big four supermarkets so they can make the 'ultimate' G&T at home. "The bowl shape of the glass means it is ideal for capturing the aroma of Bombay Sapphire gin and using a stemmed glass helps keep the serve cooler for longer," says brand director Jon Sampson. "This elevates the everyday G&T experience and allows consumers a premium drinking occasion in their own home."

Limited-edition decanters and gift packs to celebrate the brand's move from Warrington to Hampshire and the opening of new state-of-the-art Laverstoke Mill distillery later this year are set to elevate sales further, says Sampson. Both packs will be decorated with graphics by award-winning British illustrator Si Scott, and the gift packs will include a magnifying glass inviting consumers to find five historical dates hidden in the picture for the chance to win a decanter.



61 (43)

JP Chenet

SALES: £39.5m **GROWTH:** −28.3%

After an on-pack promotion offering the chance to 'win a bicyclette' in 2013 failed to boost sales, the French wine has again teamed up with Port Salut to offer French-themed prizes in a Spot the Boule competition.

62 (59)

Moët & Chandon

SALES: £39.1m **GROWTH:** +8.9%

The UK's biggest Champagne brands are fighting it out on the tennis court. As Lanson (82) sponsors Wimbledon, Moët has ads featuring Roger Federer in a bid to flog more fizz. It's working: volumes are up 11.5%.

63 (60)

Oxford Landing

SALES: £38.1m **GROWTH:** +7%

Oxford Landing had a better year after stalling in our 2013 report (value fell 12.4%). New branding has been followed by a Tube and black cab campaign promising the chance to get to know a 'real' south Australian.

64 (72)

Villa Maria

SALES: £37.1m **GROWTH:** +21.2%

Gains in distribution – particularly of its more premium wines – helped push up volume sales of Villa Maria. Winning two of a potential 13 IWC great value awards must have helped too.

65 (67)

Black Tower

SALES: £36.7m **GROWTH:** +10.2%

Black Tower has launched a 9.5% abv white bubbly hot on the heels of the launch of a pink version in May 2013. The brand is sponsoring this summer's British rom com Walking on Sunshine starring Leona Lewis.

66 (63)

Viña Maipo

SALES: £36.1m **GROWTH:** +6.2%

Increased distribution and a static average price have contributed to the Chilean wine's success this year, as it grew in value and volume. New marketing and a major redesign kick in from this month.

67 (73)

Absolut

SALES: £35.9m **GROWTH:** +19.5%

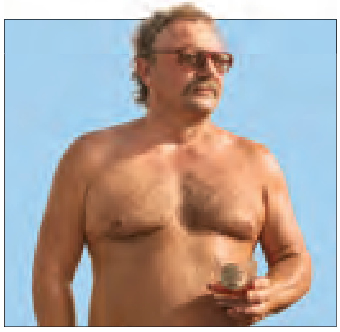
Unlike Smirnoff, all of Absolut's variants are in value growth (though Raspberri volumes have dipped slightly). What's more, on average the Swedish brand fetches a 22.5% premium over Smirnoff.

69 (65)

Southern Comfort

SALES: £34.6m **GROWTH:** +3.2%

Inspired advertising wasn't enough to stop Southern Comfort volume falling 1.3%. Bacardi Brown-Forman Brands blames a cut in deal activity, and competitive pricing around Christmas.



70 (58)

Freixenet

SALES: £34.2m **GROWTH:** −6.6%

Sales have been hit by the decision to pull back from deep promotional activity. The average price rose 9% as the brand concentrated on PR and social media activity over ads and trade investment.

71 (57)
Teacher's
SALES: £32.8m **GROWTH:** −13.9%
One of the greatest falls down our ranking of the year. The cause? The greatest price hike of the year. A litre of Teacher's has been selling for £19.29 over the past year, up by a whopping 11.4%.

72 (78)
Cobra
SALES: £32.5m **GROWTH:** +19.5%
Continuing to grow sales outside the restaurant trade, Cobra's biggest campaign to date features 'the boss,' who divides his time between Cobra and life as a luxury underwear manufacturer.

73 (69)
Smirnoff (RTDs)
SALES: £31.8m **GROWTH:** −2.8%
Smirnoff Ice continues to melt away with value down 11.5%. But as one of the original alcopops continues to fall from fashion, its premixes are in strong growth. Diageo also says it has big plans for Ice.

74 (107)
Rekorderlig
SALES: £29.6m **GROWTH:** +65.4%
Rocketing 44 places up the table, the Swedish brand benefited from last year's excellent summer. It has also been boosted by an ad push for its seasonal winter cider and the launch of apple & guava.

75 (80)
Disaronno
SALES: £29.3m **GROWTH:** +12.3%
We've knocked back an extra 100,000 (11.5%) litres of Disaronno. The brand has kept a tight lid on prices and tapped the at-home cocktail trend, encouraging us via TV to mix Disaronno Sours and Martinis.

76 (75)
Glenfiddich
SALES: £29.2m **GROWTH:** +2.4%
Even single malt is not immune to the fierce price war. Glenfiddich's value growth is inflationary, with volumes hit as it's undercut by rivals such as Jura – £35.61 a litre compared with Glenfiddich's £41.58.

77 (76)
Arniston Bay
SALES: £29.2m **GROWTH:** +4.7%
Asda listing 1.5-litre picnic-friendly pouches of Merlot and Sauvignon Blanc in May last year helped sales surge in the hot summer. In September, two 5.5% abv carbonated wine-based drinks were launched.

79 (77)
Malibu
SALES: £27.6m **GROWTH:** −0.9%
Malibu said it was going to 'liberate the spirit of summer' last year, with a bottle created by Sera Ulger and activity encouraging drinkers to use it to mix piña coladas. Alas, value and volumes are down.

80 (83)
Turner Road
SALES: £27.5m **GROWTH:** +6.2%
Following a nosedive last year, Californian brand Turner Road appears back on track, with modest volume growth and new listings. The brand has also rolled out new packaging and blends priced for every day.

78 (91)
Westons
SALES: £29.0m **GROWTH:** +31.2%
Flavoured ciders are driving much of the growth in the category – but the stellar performance of Westons shows there is still plenty of success to be had in traditional ciders.

The Hereford-based producer last year launched its first-ever TV campaign, and the brand returned to screens this May as part of a £3.5m push that will include activity at events such as next month's Bristol Balloon Festival.

Westons also had festivals on its mind with the launch of a three-litre bag-in-box version of its Wyld Wood organic cider, and this autumn will be rolling out a mulled cider 2.25-litre bag-in-box under its premium brand Henry Weston.

"We have seen massive growth of mulled cider in the on-trade," marketing manager Ian Lewis said. "It will also help with cider's seasonality and extend cider's drinking occasions."

Traditional cloudy cider Old Rosie is also getting its first above-the-line campaign, and was gaining "real traction with the off-trade".

Henry Weston Vintage has also benefited from increased advertising support, and an on-pack promotion to support the Cheltenham Jazz Festival earlier this year. This has helped sales of Vintage grow almost £5m in the past year.

"There is still headroom in the off-trade," Lewis said earlier this year. "We have a long-term aspiration to see the brand double and we're well positioned to do that."

88 (136)

Desperados

SALES: £25.1m **GROWTH:** 107.4%

Desperados has made like a bandit in the past year and is the fastest-growing brand in our top 100 table.

It is the beacon brand of the burgeoning spirits beers market – accounting for about two-thirds of total category sales – and Heineken's investment since bringing distribution in house two years ago is paying dividends.

None of that investment, insists Heineken, has been used to fund trade promotions – though a slight drop in average price suggests retailers have funded some activity themselves.

Sales have been boosted since March by the launch of mojito-flavoured variant Desperados Verde, which mixes the original drink's tequila flavour with a hint of mint and lime.

Verde is aimed at 18 to 34-year-olds and is designed to tap demand for sweeter flavours and lighter tastes, says Heineken off-trade MD Martin Porter. "We have seen an explosion of flavour innovation across cider and spirits, and are beginning to see a similar pattern with flavoured beers," he adds.

While there's every reason to expect Desperados to continue to grow, it is facing increasing competition in the spirit beers category – tipped by Heineken to reach £200m in sales in the next three years.

In particular, it will be interesting to see if AB InBev's rum-flavoured Cubanisto steals some of its thunder.

81 (79)

Chekov Imperial

SALES: £27.0m **GROWTH:** +1.2%

Booker's own-label vodka's growth is inflationary; volumes are down. Chekov's average price has climbed 4.7% to £18.83 a litre, as drinkers trade up to brands such as Smirnoff, now only 2p more per litre.

82 (84)

Lanson

SALES: £26.8m **GROWTH:** +10.3%

Lanson's status as supplier to Wimbledon (now in its 26th year) and Andy Murray's 2013 win helped sales grow, but the rise of Prosecco and own-label Champers has seen deals rise, resulting in a 2% fall in price.

83 (102)

Tyskie

SALES: £26.2m **GROWTH:** +39.9%

Twelve months ago we tipped SABMiller's 5.6% abv Polish lager brand as 'one to watch.' We weren't wrong, with growth accelerating from 23.1% a year ago, catapulting it 30 places up our rankings.

84 (90)

Veuve Clicquot

SALES: £26.2m **GROWTH:** +16.4%

Veuve Clicquot has been experimenting with ageing by submerging bottles in the Baltic Sea. But though it is the priciest fizz in the top 100, it's been forced to run deeper promotions to achieve a 20% volume uplift.

85 (99)

Torres

SALES: £26.1m **GROWTH:** +32%

Torres enjoyed the third-strongest growth of the 32 wine brands in the top 100. Marking Viña Sol's 50th anniversary with the release of a 2012 vintage helped drive the extra £6.3m in sales.

86 (88)

Jameson

SALES: £25.4m **GROWTH:** +10.9%

Pernod Ricard wants to make the Irish brand 'synonymous' with St Patrick's Day, already the brand's second-busiest time of year, aided by PoS, a limited edition and promoting the use of ginger ale as a mixer.

87 (74)

Namaqua

SALES: £25.2m **GROWTH:** −13.1%

Namaqua is hoping converting its Shiraz Cabernet Sauvignon and Chenin Blanc Chardonnay to Fairtrade will help reverse a £3.8m sales loss for the South African brand and boost UK Fairtrade wine sales by 10%.

89 (81)

Harveys

SALES: £25.1m **GROWTH:** −3.7%

Despite sherry's renaissance in the on-trade, where it's often used in cocktails, sales are falling faster than last year for Harveys. It's lost £1m from its top line in the past year; the previous loss was worth £300k.

90 (92)

Holsten Pils

SALES: £24.6m **GROWTH** +12.3%

What a difference a year makes. In our 2013 report Holsten Pils was down double digits after a sharp increase in price. This time around, value and volumes are up. That price only inched up 0.4% has surely helped.

91 (82)
Crabbie's

SALES: £24.5m **GROWTH:** −5.7%

Raspberry and strawberry & lime variants, launched in May last year, have racked up £3.4m, but the core line and the Spiced Orange and Black variants have lost £4.9m combined, dragging overall brand sales down.

92 (89)
Jägermeister

SALES: £24.2m **GROWTH:** +6.5%

Volume growth is outpacing Jägermeister's value growth, thanks to an increase in deals. A TV push featuring a band of Nordic types enjoying shots of Jäger after surfing in a near-freezing sea has helped, too.

93 (101)
Berberana

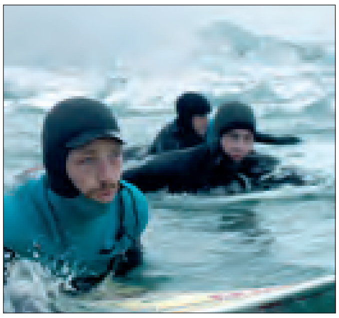
SALES: £23m **GROWTH:** +19.8%

After falling out of the top 100 last year, Berberana has re-entered our ranking by pushing its Reserva Rioja lines and keeping a tight lid on price. Sparkling sales are less impressive, down 4% to £2.4m.

94 (85)
Tennent's Super

SALES: £21.5m **GROWTH:** −9.9%

In the political climate – and with police chiefs calling for a national crackdown on super-strength booze – no wonder 9% abv Tennent's is struggling. A slight increase in average price won't have helped.



95 (93)
Scrumpy Jack

SALES: £21.4m **GROWTH:** 0%

The land of Scrumpyshire lies at the core of Scrumpy Jack's branding, its website depicting hot air balloons floating across a clear blue sky. Sales haven't been quite so idyllic: volumes have sunk 6.7%.

96 (94)
Martell

SALES: £21.3m **GROWTH:** +1.4%

Martell enters our top 100 more as a result of movements of the brands around it than from any huge initiative from the Cognac. Value growth masks a volume dip. VSOP, a fraction of Martell's UK sales, fell 23.3% in value.

97 (95)
Vladivar

SALES: £21.3m **GROWTH:** +1.4%

Vladivar's growth is mostly inflationary; volumes have dipped 2.8%. The only bright spot is the brand's raspberry & vanilla variant (20% abv), where value growth is up 12.6% on volume up 15.1%.

98 (108)
Gordon's (RTDs)

SALES: £20.8m **GROWTH:** +20.5%

We've spent an extra £3.5m on premixed Gordon's G&Ts in the past year. TV ads have undoubtedly helped the RTDs, as has the launch of premixed elderflower and cucumber variants.

99 (87)
Boddingtons

SALES: £20.4m **GROWTH:** −12.4%

Unless something changes fast, this will be Boddies' final year in the top 100. The Cream of Manchester has gone sour, losing £2.9m as owner AB InBev continues to look for a buyer for the beleaguered brand.

100 (113)
Thatchers

SALES: £20.1m **GROWTH:** +25.6%

While rivals are pimping their ciders with ever more exotic fruits in order to achieve growth, there's no danger of Thatchers jumping on the flavoured cider bandwagon any time soon. Quite simply, it doesn't need to.

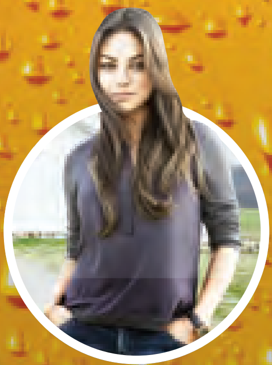
Value sales of the brand's flagship Thatchers Gold are up 45.9% thanks to new national listings for 500ml bottles of Thatchers Gold in Sainsbury's and 440ml can multipacks in both Sainsbury's and Tesco.

It's also made gains in the convenience sector with One Stop listings for Thatchers Gold 500ml can multipacks and national distribution of Thatchers Gold, Katy, Vintage and Rose on Shell forecourts.

The sales growth has been supported since April by a £6.5m TV ad campaign – its highest marketing spend to date – focusing on the company's Somerset roots. The ads will be on TV until September. Thatchers also recently signed a three-year deal to become the official cider of the Glastonbury Festival. So the future looks golden for this privately owned West Country brand.

"Our focus has always been on premium apple ciders and we firmly believe this is where the future of the category lies," says MD Martin Thatcher.

"We'll continue to innovate and look at new styles of apple cider. Thatchers Gold is the number two brand by volume in the UK on-trade, and this is now being recognised by off-trade retailers too."



101 (123)
Jim Beam

SALES: £19.6m
GROWTH: +38.4%

Jim wants to 'make history.' That's the title of the brand's new global marketing campaign fronted by Mila Kunis, which saw a range of PoS material rolled out in March. Of course it's taken more than a few cardboard displays shaped like the Beam stillhouse to get the brand where it is today: TV ads, an on-pack competition, strong growth in variants Red Stag and Honey and our ongoing passion for all things American are helping, too. If the brand keeps it up, it will enter the top 100 next year. Now that's making history.

105 (148)
Valdo

SALES: £18.1m
GROWTH: +92.6%

With Prosecco sales fizzing, it's perhaps not surprising Valdo has almost doubled its value sales since this time last year. In fact, only Desperados (89) has enjoyed stronger growth in percentage terms. Hammering home its credentials as an affordable, quality alternative to Champagne has been central to the brand's success. Emphasis on the affordable: Valdo has fetched an average of £11.31 a litre in the past year, down 3.7%. That's about a third of the price of the three Champagne brands – Moët (62), Lanson (82) and Veuve Clicquot (84) – in the top 100.

117 (132)
Three Mills

SALES: £16.1m
GROWTH: +28.8%

Attractive pricing has seen sales of British-made wine brand Three Mills soar by nearly a third. The average price of a 75cl bottle of wine reached £5.32 by Q2 2014, but at Three Mills, which specialises in lower-abv wines from 8% to 11% abv, it was £4.24 per litre – down marginally on last year. No wonder it's shifting volume.

118 (133)
Sol

SALES: £15.8m
GROWTH: +28.5%

Heineken's Sol brand is enjoying its time in the sun, thanks to growing consumer interest in lighter-tasting, more refreshing beers. It has added £3.5m to its sales in the past year, despite fairly limited marketing activity. And with demand also growing for world beers (and Mexican food more popular than ever), it will surely continue to shine.

119 (141)
Greenall's

SALES: £15.8m
GROWTH: 45.0%

Diageo claims premium gin Tanqueray – ranked Britain's 145th biggest booze brand with sales up 12.4% to £11.8m – is luring drinkers away from mainstream brands such as Greenall's. But Gordon's will no doubt be looking over its shoulder at Greenall's as it inches closer to the top 100. The brand's average price has fallen 3.4% in the past year to £17.56 a litre, undercutting Gordon's by 92p. Marketing encouraging drinkers to mix their own gin cocktails has helped, too.

129 (149)

Johnnie Walker

SALES: £14.0m
GROWTH: +48.9%

The world's biggest whisky began its march from relative obscurity here in the UK last year, with the first TV ads for Johnnie Walker Red Label in 50 years. The ads, coupled with in-store activity and the launch of a new bottle design, convinced us to serve up an extra 200,000 litres of the stuff at home over the past year. Diageo says it is aiming for a younger age group than the typical older, male blended whisky drinker, encouraging shoppers to mix the tipple with ginger ale. Pricier variant Black Label, which fetches an average of £35.94 a litre compared with Red's £23, is also in strong growth. With the help of a £7m investment this year, Johnnie's on course to walk straight into next year's top 100.

133 (146)

Green Mark

SALES: £13.5m
GROWTH: +37.8%

Since joining the First Drinks portfolio in 2012, Green Mark has been flying up the rankings, winning listings with Waitrose, Tesco, Morrisons and Asda, as well as Nisa and Costcutter in the convenience sector. Ads drumming home the brand's Russian heritage have helped, but one of the biggest factors has been price. Despite being marketed as a premium vodka, Green Mark has fetched an average of £16.88 a litre over the past year, undercutting all the full-strength vodkas in the top 100.

137 (147)

Luis Felipe Edwards

SALES: £12.7m
GROWTH: +29.6%

Chilean wine producer of the year for the second year running, Luis Felipe Edwards is living up to its reputation as one of the most progressive wineries in Chile. Established in 1976 and the largest family-owned winery in Chile, the company now produces more than one million cases per year and exports to more than 40 countries. The brand's growth is partly down to a hefty rise in average price, but volumes are still moving in the right direction, having grown by 200,000 litres (13.3%) in the past year.

145 (150)

Laurent Perrier

SALES: £11.8m
GROWTH: +32.6%

The fastest-growing Champagne brand by volume – albeit from a small base – Laurent Perrier's success appears to be rooted in pricing activity. The average price per litre fell 11.6% – more than £5 – as the Grandes Marques continue to battle against Prosecco and own-label and retailer exclusives. Winning best in show at the Chelsea Flower Show this year may not be enough to cement the brand's gains this year.

146 (151)

Cellier des Dauphins

SALES: £11.5m
GROWTH: +42%

Cellier des Dauphins comes from a co-operative union of 13 producers in the South Rhône and has seen strong double-digit growth, becoming the fastest-growing still wine brand by value and volume in our ranking. Growth is coming from the Les Dauphins brand, a range of mid-priced Cotes du Rhône that launched in 2011 and has enjoyed extended distribution this year. It has successfully tapped a resurgence in the popularity of French wines noted by buyers.