

# Millionaires

## 2011



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STORY**

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The *Drinks International* Millionaires Club is an annual listing of distilled spirits brands with sales (shipments) of 1 million 9-litre cases or more. Research is conducted independently by Euromonitor International and brands are classified under the following guidelines: Domestic/local (90% or more of volumes sold in a particular country); Regional (80% or more of volumes sold in a particular region); International (sold in at least two regions and no more than 80% in any one region).



Scotch Whisky Association

# Focusing on the positives

**A**s the 2011 Drinks International Millionaires Club list went to press, the financial authorities in Europe and beyond were still pedalling furiously to try to avoid the Greek economy going into meltdown, and potentially taking the Eurozone with it.

There's a terrible irony that it should be Greece – one of the original homes to many of the world's richest, of the drachma/euro millionaire variety – that turns out to be perhaps the biggest casualty of the global credit crisis.

Yet at the same time, it's clear that those fortunate or successful enough to live among the upper echelons of the world's income groups have passed the last couple of 'recession' years feeling little, if any, effect.

Certainly if the global distilled spirits sector is taken as an indication of the health of the global economy as a whole, then it's fair to say that 2010 saw something of a recovery, with some categories – notably cognac and scotch whisky – showing largely positive growth figures, and brands in the developing markets forging ahead at pace. Indeed only five of the top 20 brands in this year's Millionaires listing failed to achieve positive growth in 2010 sales volumes, and of those only two slipped back by more than 0.5%.

Green shoots of recovery? Let's hope so, but at this stage it's anyone's guess.



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# It's good to be back

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A broad spread of positive figures across the spirits categories indicates confidence returned to global economies in 2010, with international brands performing strongly. Euromonitor International senior alcoholic drinks analyst **Jeremy Cunnington** delves deeper

**I**n Euromonitor International's fourth year of carrying out research for the *Drinks International* Millionaires Club, the 2011 rankings (based on 2010 sales volumes) saw another record in terms of numbers of brands in the list, reaching 172. This is despite some brands dropping out of the list due to fluctuations in the various markets, and some companies not willing to take part.

The ranking continues to grow not only in length but also in breadth, with additions from new markets such as Belarus, whose six extra vodka brands have helped increase the overall numbers and are among 18 new brands in the rankings. While a number of them have broken the million case mark for the first time in 2010, others such as Miguel Torres' eponymous brandy have had volumes above one million 9-litre cases for a number of years, but have agreed to take part for the first time this year.

Thanks to its new brands Bagpiper Rum entering the Millionaires chart for the first time this year, Indian giant United Spirits now has 20 Millionaire brands and is close to matching Pernod Ricard, at the top of the list with its 21 brands.

It was the recovery in volumes of the Luksusowa Polish vodka brand, to bring it back into the list,



that meant Pernod Ricard kept its place ahead of United Spirits. Many of United's brands continue to see phenomenal rates of growth due to the company's leading position in a booming Indian spirits market, which saw double-digit volume growth in 2010.

The world's biggest alcoholic drinks firm, Diageo, remained in third place with 14 Millionaire brands, although the company will be boosted in next year's tables by its acquisition of the Turkish company Mey İçki – announced this February and scheduled to be completed in the latter half of this year. Precise figures were not available for its three million-case Yeni Raki brand in this year's tables.

The Domestic/Local brands continue to dominate with 93 entries in the tables for 2010, followed by International on 57 and Regional which had 22. This shows that the vast majority of spirits are still consumed in the country that produces them, especially in emerging markets. Indeed 16 of the 18 brands featured in Millionaires for the first time this year are in the Domestic/Local category.

## Vodka dominates numbers

Vodka overtook whiskey as the largest category in the list with 54 brands. This year it was boosted by several brands from Belarus, led by Kristall with sales of nearly 5 million 9-litre cases, but also new Domestic/Local additions from companies such as Stock Spirits and Beam Global.

Vodka is followed by the Whiskies, comprising 48 entries in the 2011 list. The category was boosted by the addition of Beam Global's small-batch bourbon, Maker's Mark, and Glen Catrine Distillery's High Commissioner blended scotch, both of which continued to see double-digit growth.

In a more distant third place comes the rum category with a relatively small 15 brands. This in turn is closely followed by Cognac & Brandy, with a combined 13 entries. After that comes Soju & Shochu with 11 brands, although the total volumes in this category are, of course, far bigger.

## International brands return to form

2010 was a far more positive year for many in the Millionaires list, especially International brands, with many returning to growth. In 2009, 36 International brands saw a decline in volume sales, while in 2010 only seven did. In addition, ▶ p6

## 2010 Global spirits market, by sector (total volume, '000 litres)

	ASIA PACIFIC	AUSTRALASIA	EASTERN EUROPE	LATIN AMERICA	MIDDLE EAST and AFRICA	NORTH AMERICA	WESTERN EUROPE	WORLD 2010	WORLD 2009	% 10-09
<b>TOTAL</b>	<b>10,206,903.7</b>	<b>72,018.2</b>	<b>3,154,680.2</b>	<b>2,346,202.2</b>	<b>271,674.8</b>	<b>1,835,804.5</b>	<b>1,955,204.1</b>	<b>19,842,487.7</b>	<b>19,288,904.5</b>	<b>2.87</b>
Whisk(e)y	1,368,782.9	32,630.1	47,122.1	145,299.9	86,044.6	457,225.6	413,813.1	2,550,918.4	2,403,463.5	6.14
Cognac/Brandy	630,659.7	2,687.9	175,789.1	126,747.8	62,599.9	100,378.1	139,063.6	1,237,926.1	1,184,325.1	4.53
White spirits	557,952.2	15,161.2	2,514,138.5	90,999.9	46,330.6	718,914.7	381,946.5	4,325,443.7	4,338,102.4	-0.29
Rum	551,987.7	8,664.3	10,418.7	390,980.8	15,392.7	260,205.7	172,494.3	1,440,144.3	1,388,950.7	3.69
Tequila (& Mezcal)	3,543.8	866.4	3,115.5	94,506.0	3,543.1	106,244.3	10,700.4	222,519.5	217,600.8	2.26
Liqueurs	48,845.9	11,346.2	139,248.2	92,911.1	20,379.5	178,335.1	392,941.1	874,007.1	878,249.9	-0.48
Other spirits	7,015,131.4	662.0	264,848.0	1,414,756.7	37,384.4	14,500.9	444,245.2	9,191,528.6	8,878,212.1	3.53

Source: Euromonitor International, from trade sources/national statistics

in 2010 nine international brands saw double-digit growth – a feat none achieved in the previous year.

Some of the decline in 2009 was undoubtedly caused by destocking as companies sold off the surplus stock from 2008. This in part explains the good growth in 2010, as brands rebounded to more normal levels. A key aspect in this has been the return to growth in the duty free/travel retail category.

In many cases, however, these International brands are still below their peaks of 2007 and 2008. There are exceptions – Pernod Ricard's Jameson, Martell and Havana Club; Diageo's Captain Morgan; and Bacardi's Eristoff brands.

### Emerging market focus key to International brands success

Brands that have performed best are those with a strong exposure to emerging markets, especially Asia Pacific. Consequently the category that has performed most strongly has been Cognac, boosted by strong growth in China and other markets in the region. In contrast, the brands which have performed

less well are those which are overly reliant on “western” markets.

An example is the two blended scotch brands, Diageo's J&B and Pernod Ricard's Ballantines. Both brands' largest market is Spain, where the scotch category is affected by a long-term decline as well as a steep recession, which has meant a 6% CAGR decline between 2005 and 2010. In 2010, J&B's volume remained static while, in contrast, Ballantine's saw growth of 7%. The stronger performance of Ballantine's was due to its more global spread, with good positions in Asia Pacific and central/eastern Europe, despite also seeing volumes falling in its key Spanish market. J&B's volumes have been overly reliant on Spain and other western European markets such as recession-hit Greece and Portugal.

While International brands have benefited from returning growth in emerging markets, so a number of local brands in these markets have done the same. Local Indian brands have continued to grow rapidly across the spirits categories. In addition, brands in Korea have seen double-digit growth, as

did Tanduay rum in the Philippines. And in Brazil, local brands such as Dreher brandy and a number of cachacas, saw growth in part due to consumers trading back up into spirits.

### Mature markets can offer growth

This is not to say that brands cannot see strong growth if they are based in these mature western markets. Jameson was in double-digit growth in 2010, despite its leading markets including the US, France and the UK. This was primarily due to the dynamic growth of Irish whiskey in the brand's largest market, the US, where the category and the brand are increasingly taking share from bourbon and other US whiskies.

Equally impressive is Campari's Regional Bitters brand Aperol, which continued to see high double-digit growth in 2010, despite its core markets of Italy, Germany and Austria seeing at best static growth during the year.

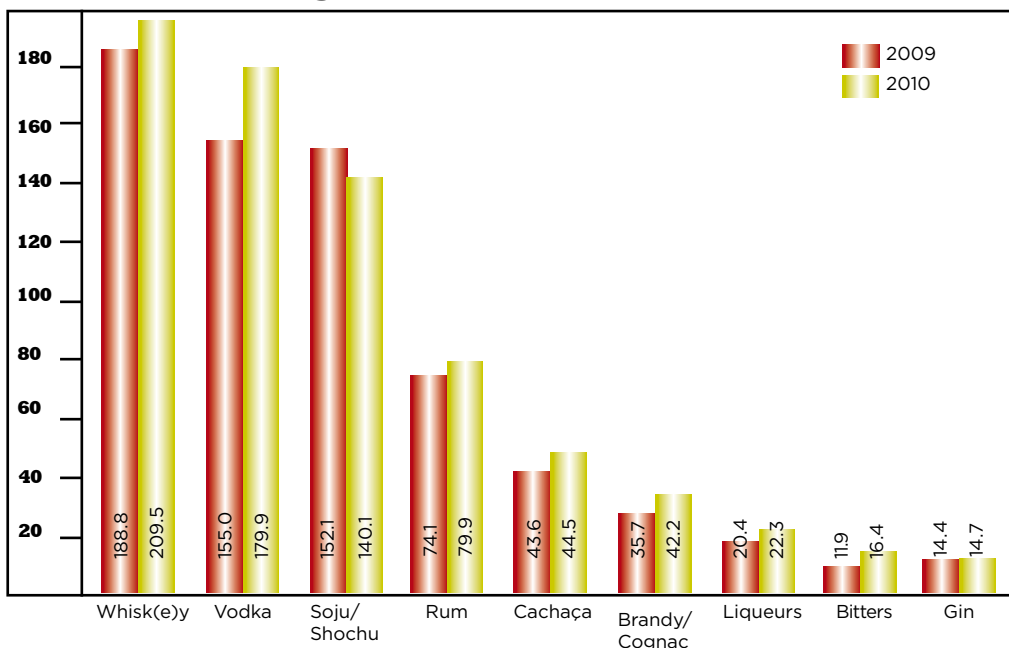
### Internationals benefit by spreading risk

As the recent economic crisis has shown, for the long-term growth and development of the International spirits brands, a broader geographic spread is needed to enable them to withstand periods of tough economic conditions when they occur in particular regions.

Emerging markets are likely to play an increasingly vital part in brand growth as disposable incomes grow. Yet, at the same time, the companies with an International focus have to maintain their core mature markets, upon which their brands depend for large proportions of their volumes and revenues.

Those brands that have benefitted and are most likely to continue to do so in the short- to medium-term are those that already have a strong and established presence in these markets, leaving companies such as Pernod Ricard and LVMH – and their globally distributed brands – best placed to make the most rapid advances.

## Millionaires Categories By Total Volume (9-litre cases)



### Millionaires Club: status split

	2009	2010
Domestic/Local	421.2	443.9
Regional	30.5	36.3
International	271.8	286.7

Volumes in millions of 9-litre cases

# Full Listing

The arrival of 18 first-time entrants into the list this year brings the total to a new high of 172 brands, with a clutch of vodkas from Belarus and famous names such as Torres brandy and Maker's Mark bourbon. The majority have shown positive growth – surely a reflection of economic recovery in mature markets and continued rapid development across emerging markets



## Millionaires Club 2011: Full Listing

BRAND	OWNER	CATEGORY	2006	2007	2008	2009	2010	% +/-	STATUS
1 <b>Jinro</b>	Jinro Limited	Soju	72.05	69.84	75.99	63.98	64.28	<b>0.5</b>	Domestic/Local
2 <b>Smirnoff</b>	Diageo	Vodka	23.00	24.30	25.70	24.00	24.30	<b>1.3</b>	International
3 <b>Lotte Liquor</b>	Lotte Liquor BG	Soju	17.58	19.03	19.89	21.23	22.60	<b>6.5</b>	Domestic/Local
4 <b>Pirassununga 51</b>	Companhia Müller de Bebidas	Cachaça	22.61	21.50	21.98	19.50	19.50	<b>0.0</b>	International
5 <b>Bacardi</b>	Bacardi	Rum	20.00	19.90	19.64	18.60	19.28	<b>3.7</b>	International
6 <b>Tanduay</b>	Tanduay Distillers	Rum	12.40	14.43	16.29	16.92	18.36	<b>8.5</b>	Domestic/Local
7 <b>Bagpiper</b>	United Spirits	Whisky - Indian	13.02	13.95	15.41	16.26	16.39	<b>0.8</b>	Domestic/Local
8 <b>Officer's Choice</b>	Allied Blenders & Distillers	Whisky - Indian	5.01	6.60	9.50	12.00	16.00	<b>33.3</b>	Domestic/Local
9 <b>Johnnie Walker</b>	Diageo	Whisky - Scotch	14.30	15.80	16.30	14.50	15.90	<b>9.7</b>	International
10 <b>McDowell's No.1</b>	United Spirits	Whisky - Indian	8.65	11.46	13.39	13.52	14.32	<b>5.9</b>	Domestic/Local
11 <b>McDowell's No.1 Celebration</b>	United Spirits	Rum	6.17	7.63	9.67	11.17	13.89	<b>24.4</b>	Domestic/Local
12 <b>Muhak White</b>	Muhak	Soju	9.99	10.56	10.92	11.04	12.96	<b>17.4</b>	Domestic/Local
13 <b>Khlibniy Dar</b>	Bayadera Group	Vodka	1.55	3.57	6.63	10.20	12.30	<b>20.6</b>	Domestic/Local
14 <b>McDowell's No.1</b>	United Spirits	Brandy - Indian	5.99	7.64	7.53	9.22	11.54	<b>25.2</b>	Domestic/Local
15 <b>Charm</b>	Kumbokju	Soju	12.16	12.25	12.28	11.61	11.07	<b>-4.7</b>	Domestic/Local
16 <b>Absolut</b>	Pernod Ricard	Vodka	9.80	10.73	10.73	10.03	10.90	<b>8.7</b>	International
17 <b>Zelenaya Marka (Green Mark)</b>	CEDC	Vodka	7.30	8.10	11.97	11.25	10.85	<b>-3.6</b>	Domestic/Local
18 <b>Royal Stag</b>	Pernod Ricard	Whisky - Indian	4.24	5.63	6.76	8.40	10.39	<b>23.7</b>	Domestic/Local
19 <b>Original Choice</b>	John Distilleries	Whisky - Indian	4.12	6.41	8.84	10.21	10.32	<b>1.1</b>	Domestic/Local
20 <b>Pitú</b>	Engarrafamento Pitú	Cachaça	8.53	9.31	9.51	9.60	10.10	<b>5.2</b>	International
21 <b>Jack Daniel's</b>	Brown-Forman	Whiskey - US-Tennessee	8.94	9.33	9.51	9.57	9.95	<b>3.9</b>	International
22 <b>Nemiroff</b>	Nemiroff Ukrainian Vodka Co	Vodka	7.80	8.89	8.55	9.10	9.21	<b>1.2</b>	International
23 <b>Old Tavern</b>	United Spirits	Whisky - Indian	2.55	2.84	4.77	6.84	9.08	<b>32.7</b>	Domestic/Local
24 <b>Khortytza</b>	Khortytza Distillery	Vodka	8.10	9.40	9.60	9.25	9.00	<b>-2.7</b>	International
25 <b>Captain Morgan</b>	Diageo	Rum	7.30	7.80	8.30	8.60	8.70	<b>1.2</b>	International
26 <b>Iichiko</b>	Sanwa Shurui	Shochu	9.86	9.88	9.14	8.74	8.32	<b>-4.8</b>	Domestic/Local
27 <b>Velho Barreiro</b>	Tatuzinho	Cachaça	7.08	7.15	7.40	7.70	8.00	<b>3.9</b>	International
28 <b>C1</b>	Daesun Distilling Co	Soju	10.30	10.40	10.52	9.78	7.70	<b>-21.3</b>	Domestic/Local
29 <b>Ypioca</b>	Grupo Ypioca	Cachaça	7.10	7.13	7.05	6.83	6.89	<b>0.9</b>	Domestic/Local
30 <b>Baileys</b>	Diageo	Liqueurs	7.10	7.70	7.60	6.40	6.60	<b>3.1</b>	International
31 <b>Jägermeister</b>	Mast-Jägermeister	Bitters	5.95	6.32	6.41	6.41	6.58	<b>2.7</b>	International
32 <b>Czysta de Luxe (ZG)</b>	Stock Spirits Group	Vodka	n/a	0.08	1.87	5.39	6.40	<b>18.7</b>	Domestic/Local
33 <b>Pyat Ozer</b>	Alcohol Siberian Group	Vodka	2.38	6.04	6.50	6.10	6.30	<b>3.3</b>	Domestic/Local
34 <b>Ballantine's</b>	Pernod Ricard	Whisky - Scotch	5.62	6.17	6.50	5.76	6.18	<b>7.3</b>	International
35 <b>Imperial Blue</b>	Pernod Ricard	Whisky - Indian	2.51	3.13	3.83	4.83	6.11	<b>26.5</b>	Domestic/Local
36 <b>Ricard</b>	Pernod Ricard	Anis	5.66	5.78	5.52	5.37	5.38	<b>0.2</b>	International



## Millionaires Club 2010: Full Listing

	BRAND	OWNER	CATEGORY	2006	2007	2008	2009	2010	% +/-	STATUS
37	Mansion House	Tilaknagar Industries	Brandy - Indian	1.00	1.32	1.77	3.96	5.38	<b>35.9</b>	Domestic/Local
38	Jim Beam	Beam Global Spirits & Wine	Whiskey - US-Bourbon	5.12	5.24	5.16	5.08	5.30	<b>4.3</b>	International
39	Crown Royal	Diageo	Whisky - Canadian	4.70	5.00	5.10	4.80	5.00	<b>4.2</b>	International
40	William Grant's	William Grant & Sons	Whisky - Scotch	4.39	4.79	4.97	4.78	4.99	<b>4.3</b>	International
41	Kristall	Minsk Kristall	Vodka	3.46	3.82	4.11	4.51	4.92	<b>9.1</b>	Domestic/Local
42	Belenkaya	SY Group	Vodka	1.89	2.04	2.25	2.81	4.92	<b>74.7</b>	Domestic/Local
43	J&B Rare	Diageo	Whisky - Scotch	5.90	5.90	5.90	4.90	4.90	<b>0.0</b>	International
44	Hennessy	LVMH	Cognac	4.32	4.74	4.49	4.25	4.65	<b>9.5</b>	International
45	Hayward's	United Spirits	Whisky - Indian	2.17	2.31	2.77	4.06	4.65	<b>14.5</b>	Domestic/Local
46	Director's Special	United Spirits	Whisky - Indian	3.77	3.69	4.00	4.39	4.54	<b>3.4</b>	Domestic/Local
47	Chivas Regal	Pernod Ricard	Whisky - Scotch	3.95	4.37	4.57	3.87	4.50	<b>16.3</b>	International
48	Honey Bee	United Spirits	Brandy - Indian	1.73	2.20	2.82	3.60	4.37	<b>21.4</b>	Domestic/Local
49	De Kuyper range	Koninklijke De Kuyper/ Beam Global	Liqueurs	4.90	4.90	4.74	4.40	4.32	<b>-1.8</b>	International
50	Gordon's	Diageo	Gin	5.00	4.50	4.30	4.20	4.20	<b>0.0</b>	International
51	8PM	Radico Khaitan	Whisky - Indian	4.15	4.16	3.76	3.18	3.94	<b>23.9</b>	Domestic/Local
52	Fernet Branca	Fratelli Branca Distillerie	Bitters	2.90	3.12	3.28	3.31	3.85	<b>16.3</b>	International
53	Kanoka	Asahi Breweries	Shochu	3.02	3.44	3.56	3.66	3.84	<b>5.0</b>	Domestic/Local
54	Havana Club	Pernod Ricard	Rum	2.61	3.00	3.40	3.28	3.77	<b>14.9</b>	International
55	Daigoro	Asahi Breweries	Shochu	5.24	4.66	4.44	4.17	3.74	<b>-10.3</b>	Domestic/Local
56	Grey Goose	Bacardi	Vodka	3.00	3.60	3.60	3.46	3.65	<b>5.5</b>	International
57	Dreher	Gruppo Campari	Brandy - Brazilian	3.50	3.75	3.60	3.45	3.50	<b>1.4</b>	Domestic/Local
58	Svedka	Constellation Brands	Vodka	1.02	1.53	2.10	2.90	3.41	<b>17.6</b>	Domestic/Local
59	Malibu	Pernod Ricard	Liqueurs	3.33	3.63	3.70	3.23	3.40	<b>5.3</b>	International
60	Sky	Gruppo Campari	Vodka	2.70	2.90	3.15	3.25	3.35	<b>3.1</b>	International
61	Dewar's	Bacardi	Whisky - Scotch	3.40	3.50	3.41	3.24	3.27	<b>0.9</b>	International
62	Jameson	Pernod Ricard	Whisky - Irish	2.18	2.48	2.73	2.74	3.17	<b>15.7</b>	International
63	Stolichnaya	Sojuzplodimport (SPI Spirits)	Vodka	3.10	3.33	3.20	3.00	3.12	<b>4.0</b>	International
64	Sobieski	Belvédère	Vodka	2.15	2.50	2.75	3.00	3.05	<b>1.7</b>	International
65	Sauza	Beam Global Spirits & Wine	Tequila	3.12	3.21	3.13	2.63	3.02	<b>14.8</b>	International
66	Old Admiral	Radico Khaitan	Brandy - Indian	1.40	1.40	1.40	1.81	2.99	<b>65.2</b>	Domestic/Local
67	Finlandia	Brown-Forman	Vodka	2.30	2.75	3.05	3.01	2.96	<b>-1.6</b>	International
68	Seagram's	Pernod Ricard	Gin	3.44	3.44	3.38	3.03	2.93	<b>-3.3</b>	Regional
69	Director's Special Black	United Spirits	Whisky - Indian	0.90	1.34	1.77	2.03	2.88	<b>41.9</b>	Domestic/Local
70	Blenders Pride	Pernod Ricard	Whisky - Indian	1.17	1.51	1.92	2.31	2.82	<b>22.1</b>	Domestic/Local
71	Absolvent	CEDC	Vodka	4.04	4.12	4.18	3.70	2.80	<b>-24.3</b>	Domestic/Local
72	Campari	Gruppo Campari	Bitters	2.90	2.93	2.93	2.70	2.80	<b>3.7</b>	International
73	Kakubin	Suntory	Whisky - Japanese	1.60	1.59	1.91	2.18	2.79	<b>28.0</b>	Regional
74	Yamskaya	CEDC	Vodka	n/a	n/a	2.16	2.40	2.61	<b>8.8</b>	Domestic/Local
75	McDowell's Green Label	United Spirits	Whisky - Indian	1.85	1.83	1.70	1.99	2.53	<b>27.1</b>	Domestic/Local
76	William Peel	Belvédère	Whisky - Scotch	1.76	1.78	2.12	2.35	2.50	<b>6.4</b>	Domestic/Local
77	Bell's	Diageo	Whisky - Scotch	2.00	2.30	2.20	2.30	2.50	<b>8.7</b>	International
78	Russian Standard	Roust	Vodka	1.35	1.90	2.10	2.20	2.50	<b>13.6</b>	International
79	Parliament	CEDC	Vodka	2.03	2.70	3.08	2.50	2.40	<b>-4.0</b>	Regional
80	Seagram's 7 Crown	Diageo	Whisky - US-Other	2.50	2.50	2.50	2.40	2.40	<b>0.0</b>	Regional



## Millionaires Club 2010: Full Listing

	BRAND	OWNER	CATEGORY	2006	2007	2008	2009	2010	% +/-	STATUS
81	Contessa	Radico Khaitan	Rum	2.50	2.08	2.20	2.56	2.37	-7.4	Domestic/Local
82	Beefeater	Pernod Ricard	Gin	2.32	2.42	2.41	2.24	2.33	4.0	International
83	Label 5	La Martiniquaise	Whisky - Scotch	1.74	1.91	1.98	2.16	2.27	5.1	International
84	Eristoff	Bacardi	Vodka	1.50	1.70	1.80	1.90	2.27	19.5	International
85	Gold Riband	United Spirits	Whisky - Indian	1.72	1.63	1.84	2.68	2.25	-16.0	Domestic/Local
86	Zhuravli	CEDC	Vodka	n/a	n/a	2.55	2.36	2.15	-8.9	Domestic/Local
87	Kinmen Kaoliang	Kinmen Kaoliang Liquor	Baijiu	1.81	1.88	2.15	2.03	2.15	5.9	Domestic/Local
88	Bombay	Bacardi	Gin	2.10	2.00	2.00	1.97	2.15	9.1	International
89	Southern Comfort	Brown-Forman	Liqueurs	2.45	2.48	2.38	2.23	2.14	-3.9	International
90	Big Man	Oenon Holdings Corp	Shochu	n/a	n/a	2.53	2.43	2.11	-13.2	Domestic/Local
91	Old Cask	United Spirits	Rum	1.45	1.28	1.72	2.21	2.11	-4.5	Domestic/Local
92	Glen's	Glen Catrine	Vodka	1.70	1.70	1.80	1.90	2.10	10.5	Domestic/Local
93	Black Velvet	Constellation Brands	Whisky - Canadian	2.11	1.91	1.96	2.04	2.07	1.5	Regional
94	Tanqueray	Diageo	Gin	2.00	2.20	2.10	1.90	2.00	5.3	International
95	Ketel One	Nolet Spirits	Vodka	1.87	1.88	1.90	1.80	2.00	11.1	Domestic/Local
96	Aperol	Gruppo Campari	Bitters	1.00	1.15	1.30	1.65	1.95	18.2	Regional
97	Canadian Club	Beam Global Spirits & Wine	Whisky - Canadian	2.07	2.04	1.96	1.89	1.92	1.6	International
98	Krupnik	Belvédère	Vodka	n/a	n/a	n/a	n/a	1.90	n/a	Domestic/Local
99	Teacher's Highland Cream	Beam Global Spirits & Wine	Whisky - Scotch	1.84	1.98	1.96	1.73	1.89	9.2	International
100	White Mischief	United Spirits	Vodka	1.12	1.26	1.57	1.90	1.87	-1.6	Domestic/Local
101	Wyborowa	Pernod Ricard	Vodka	1.17	1.78	2.32	2.12	1.83	-13.7	International
102	Old Port Rum	Amrut Distilleries	Rum	1.38	1.64	1.91	1.66	1.82	9.6	Domestic/Local
103	Magic Moments	Radico Khaitan	Vodka	0.00	0.25	0.58	0.86	1.82	111.6	Domestic/Local
104	Montilla	Pernod Ricard	Rum	2.72	2.67	2.73	1.95	1.80	-7.7	Domestic/Local
105	Zoladkowa Gorzka	Stock Spirits Group	Vodka	1.19	1.36	1.71	1.80	1.80	0.0	Domestic/Local
106	Cacique	Diageo	Rum	1.80	1.70	1.70	1.80	1.80	0.0	Regional
107	Mugi Zakari	Oenon Holdings Corp	Shochu	0.20	0.36	0.96	1.60	1.78	11.3	Domestic/Local
108	Clan Campbell	Pernod Ricard	Whisky - Scotch	1.56	1.64	1.72	1.76	1.76	0.0	Regional
109	Patrón	Patrón Spirits	Tequila	1.15	1.60	1.73	1.74	1.76	1.1	Domestic/Local
110	Canadian Mist	Brown-Forman	Whisky - Canadian	1.98	1.91	1.87	1.84	1.75	-4.8	Domestic/Local
111	Martell	Pernod Ricard	Cognac	1.46	1.61	1.54	1.46	1.75	19.9	International
112	Black Nikka	Asahi Breweries	Whisky - Japanese	1.47	1.11	1.23	1.36	1.75	28.4	Regional
113	100 Pipers	Pernod Ricard	Whisky - Scotch	2.94	2.50	2.25	2.03	1.73	-14.8	International
114	Kahlúa	Pernod Ricard	Liqueurs	2.17	2.14	2.00	1.69	1.70	0.6	International
115	1906	Stock Spirits Group	Vodka	n/a	0.74	0.83	1.39	1.70	22.3	Domestic/Local
116	William Lawson's	Bacardi	Whisky - Scotch	1.30	1.30	1.50	1.59	1.69	6.3	International
117	Muginoka	Suntory	Shochu	n/a	n/a	n/a	n/a	1.66	n/a	Domestic/Local
118	Rémy Martin*	Rémy Cointreau	Cognac	1.73	1.84	1.48	1.55	1.65	6.1	International
119	Istynna	Olimp Corp	Vodka	n/a	n/a	n/a	0.50	1.63	226.0	Domestic/Local
120	Bols	CEDC	Vodka	1.40	1.67	1.85	1.85	1.60	-13.5	Regional
121	Prime	Olimp Corp	Vodka	0.16	0.94	1.51	1.51	1.60	6.0	Domestic/Local
122	Romanov	United Spirits	Vodka	0.81	0.98	1.17	1.25	1.59	27.2	Domestic/Local
123	Brest	Belalco	Vodka	1.67	1.67	1.59	1.68	1.58	-6.0	Domestic/Local
124	Myagkov	SY Group	Vodka	2.44	2.41	1.23	1.37	1.58	15.0	Regional

\*Data from Rémy Cointreau annual reports 12 months Apr 2010-Mar 2011



## Millionaires Club 2010: Full Listing

BRAND	OWNER	CATEGORY	2006	2007	2008	2009	2010	% +/-	STATUS
125 Burnett's Vodka	Heaven Hill	Vodka	0.63	1.00	1.20	1.52	1.52	0.0	Domestic/Local
126 Aguardiente Nectar	La Empresa Cundinamarca	Aguardiente	1.31	1.37	1.31	1.39	1.51	8.8	Domestic/Local
127 Starogardzka	Belvédère	Vodka	2.65	2.85	3.01	2.00	1.50	-25.0	Domestic/Local
128 Buchanan's	Diageo	Whisky - Scotch	1.30	1.60	1.50	1.30	1.50	15.4	Regional
129 Lubelska	Stock Spirits Group	Liqueurs	n/a	0.29	0.50	0.60	1.50	150.0	Domestic/Local
130 Bagpiper Rum	United Spirits	Rum	n/a	n/a	n/a	0.99	1.45	46.5	Domestic/Local
131 Pridvine	Vitebsky LZ	Vodka	1.02	1.17	1.33	1.43	1.42	-0.7	Domestic/Local
132 Bols range	Lucas Bols	Liqueurs	1.21	1.26	1.28	1.30	1.40	7.7	International
133 Gorbatschow	Henkell & Söhnlein	Vodka	1.21	1.46	1.09	1.27	1.40	10.2	Domestic/Local
134 Torres	Miguel Torres	Brandy - Spanish	1.06	1.43	1.47	1.35	1.40	3.3	International
135 Paul Masson Grande Amber	Constellation Brands	Brandy - American	1.32	1.29	1.35	1.36	1.36	0.0	Domestic/Local
136 Signature	United Spirits	Whisky - Indian	0.58	0.76	0.99	1.14	1.32	15.8	Domestic/Local
137 Three Olives	Proximo Spirits	Vodka	0.63	0.85	1.10	1.25	1.32	5.6	Domestic/Local
138 Soplca	CEDC	Vodka	1.06	1.29	1.47	1.40	1.32	-5.7	Regional
139 Gordon's Vodka	Diageo	Vodka	1.40	1.30	1.30	1.30	1.30	0.0	Regional
140 Evan Williams	Heaven Hill	Whiskey - US-Bourbon	0.98	1.03	1.05	1.24	1.29	4.5	Domestic/Local
141 Madira XXX	Tilaknagar Industries	Rum	n/a	0.02	0.18	0.82	1.28	56.1	Domestic/Local
142 John Exshaw	United Spirits	Brandy - Indian	1.12	1.49	1.77	1.48	1.28	-13.5	Domestic/Local
143 Pastis 51	Pernod Ricard	Anis	1.53	1.49	1.41	1.34	1.27	-5.2	Regional
144 Amaro Ramazzotti	Pernod Ricard	Bitters	1.27	1.18	1.22	1.00	1.23	23.0	Regional
145 Slavyanskaya	Jupiter	Vodka	2.10	2.63	1.83	1.51	1.20	-20.5	Domestic/Local
146 Seagram's VO	Diageo	Whisky - Canadian	1.30	1.30	1.30	1.20	1.20	0.0	Regional
147 Courvoisier	Beam Global Spirits & Wine	Cognac	1.14	1.17	1.19	1.02	1.20	17.6	International
148 Amarula	Distell Group	Liqueurs	0.93	1.08	1.08	1.10	1.20	9.1	International
149 Sir Edward's	Bardinet	Whisky - Scotch	1.26	1.27	1.05	1.09	1.19	9.0	International
150 El Jimador	Brown-Forman	Tequila	n/a	0.92	1.02	1.10	1.19	8.1	Domestic/Local
151 Christian Brothers	Heaven Hill	Brandy - American	1.14	1.15	1.17	1.18	1.18	0.0	Domestic/Local
152 Zubrowka	CEDC	Vodka	n/a	1.00	1.00	1.03	1.18	14.6	Regional
153 DYC	Beam Global Spirits & Wine	Whisky - Spanish	1.42	1.43	1.22	1.19	1.17	-1.7	Domestic/Local
154 Royal Challenge	United Spirits	Whisky - Indian	1.03	1.17	1.29	1.27	1.16	-8.7	Domestic/Local
155 Klimgrad	Klimovichsky LZ	Vodka	1.72	2.01	2.10	1.71	1.16	-32.2	Domestic/Local
156 Appleton Jamaica Rum	Wray & Nephew	Rum	1.13	1.14	1.15	1.19	1.16	-2.8	International
157 Clan MacGregor	William Grant & Sons	Whisky - Scotch	1.22	1.26	1.32	1.32	1.15	-12.9	Regional
158 Luksusowa	Pernod Ricard	Vodka	1.15	1.47	1.76	0.87	1.14	31.0	Domestic/Local
159 Radamir	Gomelsky LZ	Vodka	1.06	1.28	1.33	1.28	1.14	-10.9	Domestic/Local
160 Blue Riband	United Spirits	Gin	0.95	0.96	0.99	1.09	1.13	3.7	Domestic/Local
161 Akvadviv	Akvadviv	Vodka	1.00	1.22	1.35	1.18	1.12	-5.1	Domestic/Local
162 Gorilochka	Petrus TOV	Vodka	n/a	0.44	1.03	1.15	1.11	-3.5	Domestic/Local
163 High Commissioner	Glen Catrine	Whisky - Scotch	0.50	0.60	0.90	1.00	1.10	10.0	Domestic/Local
164 Castillo	Bacardi	Rum	1.40	1.30	1.20	1.11	1.08	-2.7	Regional
165 Capel	Capel Coop. de Elqui	Pisco	1.35	1.32	1.37	1.11	1.07	-3.6	Domestic/Local
166 Kamchatka	Beam Global Spirits & Wine	Vodka	0.90	0.94	0.94	1.00	1.05	5.5	Domestic/Local
167 Old Adventurer	United Spirits	Rum	1.22	1.12	1.20	1.23	1.05	-14.6	Domestic/Local
168 Nemanoff	Grodnensky Likerovodochny	Vodka	0.58	0.64	0.84	0.96	1.04	8.3	Domestic/Local
169 Maker's Mark	Beam Global Spirits & Wine	Whiskey - US-Bourbon	0.72	0.79	0.85	0.89	1.03	15.7	Domestic/Local
170 Windsor	Beam Global Spirits & Wine	Whisky - Canadian	1.00	0.98	0.98	1.01	1.01	0.0	Regional
171 Aristocrat	Heaven Hill	Vodka	n/a	n/a	n/a	1.00	1.01	1.0	Domestic/Local
172 Stock Prestige	Stock Spirits Group	Vodka	0.00	0.00	0.00	0.20	1.00	400.0	Regional

Volume: Millions of 9-litre cases



# Chart Toppers

**T**here was very little change in the rankings for the leading International brands in 2010, with virtually all of them returning to growth in varying degrees. The only change in the top 10 ranking was between the two Ukraine-based vodka brands, which swapped positions due to decline of Khortytza and slight growth for Nemiroff.

## Regional

In Regional brands, Pernod Ricard's Seagram's Gin still leads the rankings despite its continued fall in volumes.

The brand continues to suffer from being squeezed by cheaper, local gin variants in the US. If trends continue it is likely to lose its number one position

to the fast-growing Kakubin Japanese whisky brand, produced by Suntory. Japanese whisky brands have benefited from the austerity-driven trend of consuming the cheap whisky cocktail the Highball. This has also led to a resurgence of interest in products from the category among a younger consumer base.

## Domestic/Local

The top of the rankings saw little change, with the top four brands remaining in position. It is interesting to note, though, that fourth-placed Bagpiper whisky is coming under severe pressure from its fellow Indian brand Officer's Choice, which upped its 2009 volume by an



impressive four million cases to 16 million.

While Officer's Choice overtook McDowell's No.1 whisky – fifth in last year's list – the dynamic growth of the McDowell's Celebration rum variant puts it within touching distance of its United Spirits stablemate.

Further down the rankings, Ukrainian vodka brand Khlিবniy Dar continued to see dynamic growth, improving its ranking from 12th to ninth, making it the only non-Asian brand in the Top 10 Domestic/Locals.

## Millionaires Club 2011: Top 33 International Brands 3m+ Cases

BRAND	OWNER	CATEGORY	2006	2007	2008	2009	2010	% +/-
Smirnoff	Diageo	Vodka	23.00	24.30	25.70	24.00	24.30	1.3
Pirassununga 51	Companhia Müller de Bebidas	Cachaça	22.61	21.50	21.98	19.50	19.50	0.0
Bacardi	Bacardi	Rum	20.00	19.90	19.64	18.60	19.28	3.7
Johnnie Walker	Diageo	Whisky - Scotch	14.30	15.80	16.30	14.50	15.90	9.7
Absolut	Pernod Ricard	Vodka	9.80	10.73	10.73	10.03	10.90	8.7
Pitú	Engarrafamento Pitú	Cachaça	8.53	9.31	9.51	9.60	10.10	5.2
Jack Daniel's	Brown-Forman	Whiskey - US-Tennessee	8.94	9.33	9.51	9.57	9.95	3.9
Nemiroff	Nemiroff Ukrainian Vodka Company	Vodka	7.80	8.89	8.55	9.10	9.21	1.2
Khortytza	Khortytza Distillery	Vodka	8.1	9.4	9.6	9.25	9.00	-2.7
Captain Morgan	Diageo	Rum	7.30	7.80	8.30	8.60	8.70	1.2
Velho Barreiro	Tatuzinho	Cachaça	7.08	7.15	7.40	7.70	8.00	3.9
Baileys	Diageo	Liqueurs	7.10	7.70	7.60	6.40	6.60	3.1
Jägermeister	Mast-Jägermeister	Bitters	5.95	6.32	6.41	6.41	6.58	2.7
Ballantine's	Pernod Ricard	Whisky - Scotch	5.62	6.17	6.50	5.76	6.18	7.3
Ricard	Pernod Ricard	Anis	5.66	5.78	5.52	5.37	5.38	0.2
Jim Beam	Beam Global Spirits & Wine	Whiskey - US - Bourbon	5.12	5.24	5.16	5.08	5.30	4.3
Crown Royal	Diageo	Whisky - Canadian	4.70	5.00	5.10	4.80	5.00	4.2
William Grant's	William Grant & Sons	Whisky - Scotch	4.39	4.79	4.97	4.78	4.99	4.3
J&B Rare	Diageo	Whisky - Scotch	5.90	5.90	5.90	4.90	4.90	0.0
Hennessy	LVMH	Cognac	4.32	4.74	4.49	4.25	4.65	9.5
Chivas Regal	Pernod Ricard	Whisky - Scotch	3.95	4.37	4.57	3.87	4.50	16.3
De Kuyper range	Koninklijke De Kuyper/Beam Global	Liqueurs	4.90	4.90	4.74	4.40	4.32	-1.8
Gordon's	Diageo	Gin	5.00	4.50	4.30	4.20	4.20	0.0
Fernet Branca	Fratelli Branca Distillerie	Bitters	2.90	3.12	3.28	3.31	3.85	16.3
Havana Club	Pernod Ricard	Rum	2.61	3.00	3.40	3.28	3.77	14.9
Grey Goose	Bacardi	Vodka	3.00	3.60	3.60	3.46	3.65	5.5
Malibu	Pernod Ricard	Liqueurs	3.33	3.63	3.70	3.23	3.40	5.3
Sky	Gruppo Campari	Vodka	2.70	2.90	3.15	3.25	3.35	3.1
Dewar's	Bacardi	Whisky - Scotch	3.40	3.50	3.41	3.24	3.27	0.9
Jameson	Pernod Ricard	Whiskey - Irish	2.18	2.48	2.73	2.74	3.17	15.7
Stolichnaya	Sojuzplodimport (SPI Spirits)	Vodka	3.10	3.33	3.20	3.00	3.12	4.0
Sobieski	Belvédère	Vodka	2.15	2.5	2.75	3.00	3.05	1.7
Sauza	Beam Global Spirits & Wine	Tequila	3.12	3.21	3.13	2.63	3.02	14.8

Volume: Millions of 9-litre cases



## Millionaires Club 2011: Top 33 Domestic/Local Brands 3m+ Cases

BRAND	OWNER	CATEGORY	2006	2007	2008	2009	2010	% +/-
Jinro	Jinro Limited	Soju	72.05	69.84	75.99	63.98	64.28	0.5
Lotte Liquor	Lotte Liquor BG	Soju	17.58	19.03	19.89	21.23	22.60	6.5
Tanduay	Tanduay Distillers	Rum	12.40	14.43	16.29	16.92	18.36	8.5
Bagpiper	United Spirits	Whisky - Indian	13.02	13.95	15.41	16.26	16.39	0.8
Officer's Choice	Allied Blenders & Distillers	Whisky - Indian	5.01	6.60	9.50	12.00	16.00	33.3
McDowell's No.1	United Spirits	Whisky - Indian	8.65	11.46	13.39	13.52	14.32	5.9
McDowell's No.1 Celebration	United Spirits	Rum	6.17	7.63	9.67	11.17	13.89	24.4
Muhak White	Muhak	Soju	9.99	10.56	10.92	11.04	12.96	17.4
Khlibniy Dar	Bayadera Group	Vodka	1.55	3.57	6.63	10.20	12.30	20.6
McDowell's No.1	United Spirits	Brandy - Indian	5.99	7.64	7.53	9.22	11.54	25.2
Charm	Kumbokju	Soju	12.16	12.25	12.28	11.61	11.07	-4.7
Zelenaya Marka (Green Mark)	CEDC	Vodka	7.30	8.10	11.97	11.25	10.85	-3.6
Royal Stag	Pernod Ricard	Whisky - Indian	4.24	5.63	6.76	8.40	10.39	23.7
Original Choice	John Distilleries	Whisky - Indian	4.12	6.41	8.84	10.21	10.32	1.1
Old Tavern	United Spirits	Whisky - Indian	2.55	2.84	4.77	6.84	9.08	32.7
Ilichiko	Sanwa Shurui	Shochu	9.86	9.88	9.14	8.74	8.32	-4.8
C1	Daesun Distilling Co	Soju	10.30	10.40	10.52	9.78	7.70	-21.3
Ypioca	Grupo Ypioca	Cachaça	7.10	7.13	7.05	6.83	6.89	0.9
Czysta de Luxe (ZG)	Stock Spirits Group	Vodka	n/a	0.08	1.87	5.39	6.40	18.7
Pyat Ozer	Alcohol Siberian Group	Vodka	2.38	6.04	6.50	6.10	6.30	3.3
Imperial Blue	Pernod Ricard	Whisky - Indian	2.51	3.13	3.83	4.83	6.11	26.5
Mansion House	Tilaknagar Industries	Brandy - Indian	1.00	1.32	1.77	3.96	5.38	35.9
Kristall	Minsk Kristall	Vodka	3.46	3.82	4.11	4.51	4.92	9.1
Belenkaya	SY Group	Vodka	1.89	2.04	2.25	2.81	4.92	74.7
Hayward's	United Spirits	Whisky - Indian	2.17	2.31	2.77	4.06	4.65	14.5
Director's Special	United Spirits	Whisky - Indian	3.77	3.69	4.00	4.39	4.54	3.4
Honey Bee	United Spirits	Brandy - Indian	1.73	2.20	2.82	3.60	4.37	21.4
8PM	Radico Khaitan	Whisky - Indian	4.15	4.16	3.76	3.18	3.94	23.9
Kanoka	Asahi Breweries	Shochu	3.02	3.44	3.56	3.66	3.84	5.0
Daigoro	Asahi Breweries	Shochu	5.24	4.66	4.44	4.17	3.74	-10.3
Dreher	Gruppo Campari	Brandy - Brazilian	3.50	3.75	3.60	3.45	3.50	1.4
Svedka	Constellation Brands	Vodka	1.02	1.53	2.10	2.90	3.41	17.6

## Millionaires Club 2010: Top 10 Regional Brands

BRAND	OWNER	CATEGORY	2006	2007	2008	2009	2010	% +/-
Seagram's	Pernod Ricard	Gin	3.44	3.44	3.38	3.03	2.93	-3.3
Suntory Kakubin	Suntory	Whisky - Japanese	1.60	1.59	1.91	2.18	2.79	28.0
Parliament	CEDC	Vodka	2.03	2.70	3.08	2.50	2.40	-4.0
Seagram's 7 Crown	Diageo	Whiskey - US - Other	2.50	2.50	2.50	2.40	2.40	0.0
Black Velvet	Constellation Brands	Whisky - Canadian	2.11	1.91	1.96	2.04	2.07	1.5
Aperol	Gruppo Campari	Bitters	1.00	1.15	1.30	1.65	1.95	18.2
Cacique	Diageo	Rum	1.80	1.70	1.70	1.80	1.80	0.0
Clan Campbell	Pernod Ricard	Whisky - Scotch	1.56	1.64	1.72	1.76	1.76	0.0
Black Nikka	Asahi Breweries	Whisky - Japanese	1.47	1.11	1.23	1.36	1.75	28.4
Bols	CEDC	Vodka	1.40	1.67	1.85	1.85	1.60	-13.5

Volume: Millions of 9-litre cases

# Fastest Growing



**I**nternational brands had a far better year in growth terms in 2010, with only 10 of them not seeing growth during the year. Nine of the brands saw double-digit growth, led by Pernod Ricard's Martell, with a 20% increase thanks to strong growth in China and other Asia Pacific markets.

The other cognac brands also performed well, with Courvoisier being the third fastest-growing International brand, similarly seeing double-digit growth thanks to its strength in its key US and UK markets.

Eristoff was the second fastest-growing International brand, benefiting from Bacardi's attempt to broaden the brand's distribution as witnessed by its 2009 UK launch.

Beneath the top three fastest-growing brands is a trio of brands from the Pernod Ricard stable.

Chivas Regal saw strong growth due to its exposure to Asia, while Jameson received a boost in its core US market, where interest in Irish whiskey in general has risen. Havana Club saw strong growth in its domestic market, Cuba.

## Regional

A number of Regional brands saw very strong growth. The list is led by Stock Spirits' Stock Prestige brand, which saw phenomenal growth, albeit from a very low base, bringing it into the Millionaires Club for the first time. Despite being sold in 13 other markets, its key growth market was its domestic one, Poland. The brand is followed by two Japanese whiskies. Their remarkable growth after years of decline has been driven by a domestic trend for whisky Highball cocktails.

## Domestic/local

As in previous years Domestic/Local brands see far more dynamic growth than the other categories. Three brands more than doubled volumes, and in the case of Olimp Corp's Istynna tripled growth.

All the most dynamically growing brands are from small volume bases. In actual volume terms the most impressive growth came from Indian brands, with ABD's Officer's Choice growing by a remarkable four million cases while United Spirits' McDowell's rum and brandy variants each grew in the region of three million cases.



## Millionaires Club 2011: Fastest Growing International Brands Top 20

BRAND	OWNER	CATEGORY	2006	2007	2008	2009	2010	% +/-
Martell	Pernod Ricard	Cognac	1.46	1.61	1.54	1.46	1.75	19.9
Eristoff	Bacardi	Vodka	1.50	1.70	1.80	1.90	2.27	19.5
Courvoisier	Beam Global Spirits & Wine	Cognac	1.14	1.17	1.19	1.02	1.20	17.6
Fernet Branca	Fratelli Branca Distillerie	Bitters	2.90	3.12	3.28	3.31	3.85	16.3
Chivas Regal	Pernod Ricard	Whisky - Scotch	3.95	4.37	4.57	3.87	4.50	16.3
Jameson	Pernod Ricard	Whiskey - Irish	2.18	2.48	2.73	2.74	3.17	15.7
Havana Club	Pernod Ricard	Rum	2.61	3.00	3.40	3.28	3.77	14.9
Sauza	Beam Global Spirits & Wine	Tequila	3.12	3.21	3.13	2.63	3.02	14.8
Russian Standard	Roust	Vodka	1.35	1.90	2.10	2.20	2.50	13.6
Johnnie Walker	Diageo	Whisky - Scotch	14.30	15.80	16.30	14.50	15.90	9.7
Hennessy	LVMH	Cognac	4.32	4.74	4.49	4.25	4.65	9.5
Teacher's Highland Cream	Beam Global Spirits & Wine	Whisky - Scotch	1.84	1.98	1.96	1.73	1.89	9.2
Bombay	Bacardi	Gin	2.10	2.00	2.00	1.97	2.15	9.1
Amarula	Distell Group	Liqueurs	0.93	1.08	1.08	1.10	1.20	9.1
Sir Edward's	Bardinet	Whisky - Scotch	1.26	1.27	1.05	1.09	1.19	9.0
Bell's	Diageo	Whisky - Scotch	2.00	2.30	2.20	2.30	2.50	8.7
Absolut	Pernod Ricard	Vodka	9.80	10.73	10.73	10.03	10.90	8.7
Bols range	Lucas Bols	Liqueurs	1.21	1.26	1.28	1.30	1.40	7.7
Ballantine's	Pernod Ricard	Whisky - Scotch	5.62	6.17	6.50	5.76	6.18	7.3
William Lawson's	Bacardi	Whisky - Scotch	1.30	1.30	1.50	1.59	1.69	6.3

Volume: Millions of 9-litre cases

**Millionaires Club 2011: Fastest Growing Regional Brands**

BRAND	OWNER	CATEGORY	2006	2007	2008	2009	2010	% +/-
<b>Stock Prestige</b>	Stock Spirits Group	Vodka	0.00	0.00	0.00	0.20	1.00	<b>400.0</b>
<b>Black Nikka</b>	Asahi Breweries	Whisky - Japanese	1.47	1.11	1.23	1.36	1.75	<b>28.4</b>
<b>Suntory Kakubin</b>	Suntory	Whisky - Japanese	1.60	1.59	1.91	2.18	2.79	<b>28.0</b>
<b>Amaro Ramazzotti</b>	Pernod Ricard	Bitters	1.27	1.18	1.22	1.00	1.23	<b>23.0</b>
<b>Aperol</b>	Gruppo Campari	Bitters	1.00	1.15	1.30	1.65	1.95	<b>18.2</b>
<b>Buchanan's</b>	Diageo	Whisky - Scotch	1.30	1.60	1.50	1.30	1.50	<b>15.4</b>
<b>Myagkov</b>	SY Group	Vodka	2.44	2.41	1.23	1.37	1.58	<b>15.0</b>
<b>Zubrowka</b>	CEDC	Vodka	n/a	1.00	1.00	1.03	1.18	<b>14.6</b>
<b>Black Velvet</b>	Constellation Brands	Whisky - Canadian	2.11	1.91	1.96	2.04	2.07	<b>1.5</b>


**Millionaires Club 2011: Fastest Growing Domestic/Local Brands Top 40**

BRAND	OWNER	CATEGORY	2006	2007	2008	2009	2010	% +/-
<b>Istynna</b>	Olimp Corp	Vodka	n/a	n/a	n/a	0.50	1.63	<b>226.0</b>
<b>Lubelska</b>	Stock Spirits Group	Liqueurs	n/a	0.29	0.50	0.60	1.50	<b>150.0</b>
<b>Magic Moments</b>	Radico Khaitan	Vodka	0.00	0.25	0.58	0.86	1.82	<b>111.6</b>
<b>Belenkaya</b>	SY Group	Vodka	1.89	2.04	2.25	2.81	4.92	<b>74.7</b>
<b>Old Admiral</b>	Radico Khaitan	Brandy - Indian	1.40	1.40	1.40	1.81	2.99	<b>65.2</b>
<b>Madira XXX</b>	Tilaknagar Industries	Rum	n/a	0.02	0.18	0.82	1.28	<b>56.1</b>
<b>Bagpiper Rum</b>	United Spirits	Rum	n/a	n/a	n/a	0.99	1.45	<b>46.46</b>
<b>Director's Special Black</b>	United Spirits	Whisky - Indian	0.90	1.34	1.77	2.03	2.88	<b>41.9</b>
<b>Mansion House</b>	Tilaknagar Industries	Brandy - Indian	1.00	1.32	1.77	3.96	5.38	<b>35.9</b>
<b>Officer's Choice</b>	Allied Blenders & Distillers	Whisky - Indian	5.01	6.60	9.50	12.00	16.00	<b>33.3</b>
<b>Old Tavern</b>	United Spirits	Whisky - Indian	2.55	2.84	4.77	6.84	9.08	<b>32.7</b>
<b>Lukusowa</b>	Pernod Ricard	Vodka	1.15	1.47	1.76	0.87	1.14	<b>31.0</b>
<b>Romanov</b>	United Spirits	Vodka	0.81	0.98	1.17	1.25	1.59	<b>27.2</b>
<b>McDowell's Green Label</b>	United Spirits	Whisky - Indian	1.85	1.83	1.70	1.99	2.53	<b>27.1</b>
<b>Imperial Blue</b>	Pernod Ricard	Whisky - Indian	2.51	3.13	3.83	4.83	6.11	<b>26.5</b>
<b>McDowell's No.1</b>	United Spirits	Brandy - Indian	5.99	7.64	7.53	9.22	11.54	<b>25.2</b>
<b>McDowell's No.1 Celebration</b>	United Spirits	Rum	6.17	7.63	9.67	11.17	13.89	<b>24.4</b>
<b>8PM</b>	Radico Khaitan	Whisky - Indian	4.15	4.16	3.76	3.18	3.94	<b>23.9</b>
<b>Royal Stag</b>	Pernod Ricard	Whisky - Indian	4.24	5.63	6.76	8.40	10.39	<b>23.7</b>
<b>1906</b>	Stock Spirits Group	Vodka	n/a	0.74	0.83	1.39	1.70	<b>22.3</b>
<b>Blenders Pride</b>	Pernod Ricard	Whisky - Indian	1.17	1.51	1.92	2.31	2.82	<b>22.1</b>
<b>Honey Bee</b>	United Spirits	Brandy - Indian	1.73	2.20	2.82	3.60	4.37	<b>21.4</b>
<b>Khlibniy Dar</b>	Bayadera Group	Vodka	1.55	3.57	6.63	10.20	12.30	<b>20.6</b>
<b>Czysta de Luxe (ZG)</b>	Stock Spirits Group	Vodka	n/a	0.08	1.87	5.39	6.40	<b>18.7</b>
<b>Svedka</b>	Constellation Brands	Vodka	1.02	1.53	2.10	2.90	3.41	<b>17.6</b>
<b>Muhak White</b>	Muhak	Soju	9.99	10.56	10.92	11.04	12.96	<b>17.4</b>
<b>Signature</b>	United Spirits	Whisky - Indian	0.58	0.76	0.99	1.14	1.32	<b>15.8</b>
<b>Maker's Mark</b>	Beam Global Spirits & Wine	Whiskey - US-Bourbon	0.72	0.79	0.85	0.89	1.03	<b>15.7</b>
<b>Hayward's</b>	United Spirits	Whisky - Indian	2.17	2.31	2.77	4.06	4.65	<b>14.5</b>
<b>Mugi Zakari</b>	Oenon Holdings Corp	Shochu	0.20	0.36	0.96	1.60	1.78	<b>11.3</b>
<b>Ketel One</b>	Nolet Spirits	Vodka	1.87	1.88	1.90	1.80	2.00	<b>11.1</b>
<b>Glen's</b>	Glen Catrine	Vodka	1.70	1.70	1.80	1.90	2.10	<b>10.5</b>
<b>Gorbatschow</b>	Henkell & Söhnlein	Vodka	1.21	1.46	1.09	1.27	1.40	<b>10.2</b>
<b>High Commissioner</b>	Glen Catrine	Whisky - Scotch	0.50	0.60	0.90	1.00	1.10	<b>10.0</b>
<b>Old Port Rum</b>	Amrut Distilleries	Rum	1.38	1.64	1.91	1.66	1.82	<b>9.6</b>
<b>Kristall</b>	Minsk Kristall	Vodka	3.46	3.82	4.11	4.51	4.92	<b>9.1</b>
<b>Aguardiente Nectar</b>	La Empresa Cundinamarca	Aguardiente	1.31	1.37	1.31	1.39	1.51	<b>8.8</b>
<b>Yamskaya</b>	CEDC	Vodka	n/a	n/a	2.16	2.40	2.61	<b>8.8</b>
<b>Tanduay</b>	Tanduay Distillers	Rum	12.40	14.43	16.29	16.92	18.36	<b>8.5</b>
<b>Nemanoff</b>	Grodnensky Likerovodochny	Vodka	0.58	0.64	0.84	0.96	1.04	<b>8.3</b>

**Volume: Millions of 9-litre cases**

# Whiskies

Indian whisky is becoming increasingly dominant in the rankings of leading whisky brands. Despite returning to growth, the number-one selling whisky in 2008, Johnnie Walker, has now moved down to third, following the continued dynamic growth of ABD's Officer's Choice. Indian whisky accounted for seven of the 10 leading whisky brands by volume in 2010.

This is despite scotch brands generally having a good year, although many of them are still below their 2007 or 2008 peaks. Although it is strong in emerging markets such as Asia, Johnnie Walker's growth was held back by declines in the key markets of the US and Spain, while J&B also continued to suffer from its overexposure to Spain.

In contrast, Buchanan's benefitted from strong growth in the US and Latin America, and Bell's saw good growth

thanks to Russia and South Africa.

Pernod Ricard's portfolio of scotch was more a mixed bag, with good growth from Ballantine's and Chivas Regal, due to their exposure to Asia Pacific markets such as China. This was countered by the continued decline of its 100 Pipers brand, caused by ongoing difficulties in its main market of Thailand.

While showing some growth, Bacardi's Dewar's suffered from its overexposure to sluggish, mature western markets, notably the US.

The French market is by far scotch whisky's largest by volume according to the Scotch Whisky Association, its 164.5 million 70cl bottles in 2010 representing more than 15% of the total. Brands with good exposure here all seemed to grow, including Grant's and William Peel.

Of the other international whisky categories, the American brands saw



mixed results. Jack Daniel's suffered due to struggles in its domestic market, with exports being key to its 2010 growth. Its suffering was in part due to the contrasting performance of Jim Beam, which saw relatively strong growth in the US, thanks to the launch of its cherry-flavoured Red Stag variant and the relaunch of Black Label.

Yet both major American whiskey brands suffered, as did the category, from US consumers moving into Irish whiskey – in particular Jameson, which grew by 16%, primarily due to booming US sales.

### Fastest growers

It is perhaps no surprise that an Indian whisky leads the fastest growth table, or indeed that its brands dominate the table, due to the continued boom in the category.

What is perhaps more surprising is the fact that two Japanese brands are ranked as high as fourth and fifth, each

## Millionaires Club 2011: Top 30 Whiskies

BRAND	OWNER	CATEGORY	2006	2007	2008	2009	2010	% +/-	STATUS
Bagpiper	United Spirits	Whisky - Indian	13.02	13.95	15.41	16.26	16.39	0.8	Domestic/Local
Officer's Choice	Allied Blenders & Distillers	Whisky - Indian	5.01	6.60	9.50	12.00	16.00	33.3	Domestic/Local
Johnnie Walker	Diageo	Whisky - Scotch	14.30	15.80	16.30	14.50	15.90	9.7	International
McDowell's No.1	United Spirits	Whisky - Indian	8.65	11.46	13.39	13.52	14.32	5.9	Domestic/Local
Royal Stag	Pernod Ricard	Whisky - Indian	4.24	5.63	6.76	8.40	10.39	23.7	Domestic/Local
Original Choice	John Distilleries	Whisky - Indian	4.12	6.41	8.84	10.21	10.32	1.1	Domestic/Local
Jack Daniel's	Brown-Forman	Whiskey - US-Tennessee	8.94	9.33	9.51	9.57	9.95	3.9	International
Old Tavern	United Spirits	Whisky - Indian	2.55	2.84	4.77	6.84	9.08	32.7	Domestic/Local
Ballantine's	Pernod Ricard	Whisky - Scotch	5.62	6.17	6.50	5.76	6.18	7.3	International
Imperial Blue	Pernod Ricard	Whisky - Indian	2.51	3.13	3.83	4.83	6.11	26.5	Domestic/Local
Jim Beam	Beam Global Spirits & Wine	Whiskey - US-Bourbon	5.12	5.24	5.16	5.08	5.30	4.3	International
Crown Royal	Diageo	Whisky - Canadian	4.70	5.00	5.10	4.80	5.00	4.2	International
William Grant's	William Grant & Sons	Whisky - Scotch	4.39	4.79	4.97	4.78	4.99	4.3	International
J&B Rare	Diageo	Whisky - Scotch	5.90	5.90	5.90	4.90	4.90	0.0	International
Hayward's	United Spirits	Whisky - Indian	2.17	2.31	2.77	4.06	4.65	14.5	Domestic/Local
Director's Special	United Spirits	Whisky - Indian	3.77	3.69	4.00	4.39	4.54	3.4	Domestic/Local
Chivas Regal	Pernod Ricard	Whisky - Scotch	3.95	4.37	4.57	3.87	4.50	16.3	International
BPM	Radico Khaitan	Whisky - Indian	4.15	4.16	3.76	3.18	3.94	23.9	Domestic/Local
Dewar's	Bacardi	Whisky - Scotch	3.40	3.50	3.41	3.24	3.27	0.9	International
Jameson	Pernod Ricard	Whiskey - Irish	2.18	2.48	2.73	2.74	3.17	15.7	International
Director's Special Black	United Spirits	Whisky - Indian	0.90	1.34	1.77	2.03	2.88	41.9	Domestic/Local
Blenders Pride	Pernod Ricard	Whisky - Indian	1.17	1.51	1.92	2.31	2.82	22.1	Domestic/Local
Kakubin	Suntory	Whisky - Japanese	1.60	1.59	1.91	2.18	2.79	28.0	Regional
McDowell's Green Label	United Spirits	Whisky - Indian	1.85	1.83	1.70	1.99	2.53	27.1	Domestic/Local
Bell's	Diageo	Whisky - Scotch	2.00	2.30	2.20	2.30	2.50	8.7	International
William Peel	Belvédère	Whisky - Scotch	1.76	1.78	2.12	2.35	2.50	6.4	Domestic/Local
Seagram's 7 Crown	Diageo	Whiskey - US-Other	2.50	2.50	2.50	2.40	2.40	0.0	Regional
Label 5	La Martiniquaise	Whisky - Scotch	1.74	1.91	1.98	2.16	2.27	5.1	International
Gold Riband	United Spirits	Whisky - Indian	1.72	1.63	1.84	2.68	2.25	-16.0	Domestic/Local
Black Velvet	Constellation Brands	Whisky - Canadian	2.11	1.91	1.96	2.04	2.07	1.5	Regional

Volume: Millions of 9-litre cases

with significant growth of 28%, driven by the growing trend among Japanese consumers for drinking Highballs (the fashionable long drink, Japanese whisky mixed with soda water on ice).

Further down the list two brands saw surprisingly good growth considering the markets they are in – Maker's Mark bourbon and High Commissioner Scotch, with growth of 16% and 10% respectively.

The former is a premium small-batch bourbon but has successfully captured the trend for some bourbon consumers looking to trade up. High Commissioner's growth has been thanks to its clever price positioning at the economy end of the market, which has helped it to gain strong distribution.



## Millionaires Club 2011: Fastest Growing Whiskies

BRAND	OWNER	CATEGORY	2006	2007	2008	2009	2010	% +/-	STATUS
Director's Special Black	United Spirits	Whisky - Indian	0.90	1.34	1.77	2.03	2.88	41.9	Domestic/Local
Officer's Choice	Allied Blenders & Distillers	Whisky - Indian	5.01	6.60	9.50	12.00	16.00	33.3	Domestic/Local
Old Tavern	United Spirits	Whisky - Indian	2.55	2.84	4.77	6.84	9.08	32.7	Domestic/Local
Black Nikka	Asahi Breweries	Whisky - Japanese	1.47	1.11	1.23	1.36	1.75	28.4	Regional
Kakubin	Suntory	Whisky - Japanese	1.60	1.59	1.91	2.18	2.79	28.0	Regional
McDowell's Green Label	United Spirits	Whisky - Indian	1.85	1.83	1.70	1.99	2.53	27.1	Domestic/Local
Imperial Blue	Pernod Ricard	Whisky - Indian	2.51	3.13	3.83	4.83	6.11	26.5	Domestic/Local
8PM	Radico Khaitan	Whisky - Indian	4.15	4.16	3.76	3.18	3.94	23.9	Domestic/Local
Royal Stag	Pernod Ricard	Whisky - Indian	4.24	5.63	6.76	8.40	10.39	23.7	Domestic/Local
Blenders Pride	Pernod Ricard	Whisky - Indian	1.17	1.51	1.92	2.31	2.82	22.1	Domestic/Local
Chivas Regal	Pernod Ricard	Whisky - Scotch	3.95	4.37	4.57	3.87	4.50	16.3	International
Signature	United Spirits	Whisky - Indian	0.58	0.76	0.99	1.14	1.32	15.8	Domestic/Local
Jameson	Pernod Ricard	Whiskey - Irish	2.18	2.48	2.73	2.74	3.17	15.7	International
Maker's Mark	Beam Global Spirits & Wine	Whiskey - US-Bourbon	0.72	0.79	0.85	0.89	1.03	15.7	Domestic/Local
Buchanan's	Diageo	Whisky - Scotch	1.30	1.60	1.50	1.30	1.50	15.4	Regional
Hayward's	United Spirits	Whisky - Indian	2.17	2.31	2.77	4.06	4.65	14.5	Domestic/Local
High Commissioner	Glen Catrine	Whisky - Scotch	0.50	0.60	0.90	1.00	1.10	10.0	Domestic/Local
Johnnie Walker	Diageo	Whisky - Scotch	14.30	15.80	16.30	14.50	15.90	9.7	International
Teacher's Highland Cream	Beam Global Spirits & Wine	Whisky - Scotch	1.84	1.98	1.96	1.73	1.89	9.2	International
Sir Edward's	Bardinet	Whisky - Scotch	1.26	1.27	1.05	1.09	1.19	9.0	International
Bell's	Diageo	Whisky - Scotch	2.00	2.30	2.20	2.30	2.50	8.7	International
Ballantine's	Pernod Ricard	Whisky - Scotch	5.62	6.17	6.50	5.76	6.18	7.3	International
William Peel	Belvédère	Whisky - Scotch	1.76	1.78	2.12	2.35	2.50	6.4	Domestic/Local
William Lawson's	Bacardi	Whisky - Scotch	1.30	1.30	1.50	1.59	1.69	6.3	International
McDowell's No.1	United Spirits	Whisky - Indian	8.65	11.46	13.39	13.52	14.32	5.9	Domestic/Local
Label 5	La Martiniquaise	Whisky - Scotch	1.74	1.91	1.98	2.16	2.27	5.1	International
Evan Williams	Heaven Hill	Whiskey - US-Bourbon	0.98	1.03	1.05	1.24	1.29	4.5	Domestic/Local
Jim Beam	Beam Global Spirits & Wine	Whiskey - US-Bourbon	5.12	5.24	5.16	5.08	5.30	4.3	International
William Grant's	William Grant & Sons	Whisky - Scotch	4.39	4.79	4.97	4.78	4.99	4.3	International
Crown Royal	Diageo	Whisky - Canadian	4.70	5.00	5.10	4.80	5.00	4.2	International
Jack Daniel's	Brown-Forman	Whiskey - US-Tennessee	8.94	9.33	9.51	9.57	9.95	3.9	International
Director's Special	United Spirits	Whisky - Indian	3.77	3.69	4.00	4.39	4.54	3.4	Domestic/Local
Canadian Club	Beam Global Spirits & Wine	Whisky - Canadian	2.07	2.04	1.96	1.89	1.92	1.6	International
Black Velvet	Constellation Brands	Whisky - Canadian	2.11	1.91	1.96	2.04	2.07	1.5	Regional
Original Choice	John Distilleries	Whisky - Indian	4.12	6.41	8.84	10.21	10.32	1.1	Domestic/Local
Dewar's	Bacardi	Whisky - Scotch	3.40	3.50	3.41	3.24	3.27	0.9	International

Volume: Millions of 9-litre cases

# Whiskies by Region

## Millionaires Club 2011: Whiskies - Scotland

BRAND	OWNER	2006	2007	2008	2009	2010	% +/-	STATUS
Johnnie Walker	Diageo	14.30	15.80	16.30	14.50	15.90	9.7	International
Ballantine's	Pernod Ricard	5.62	6.17	6.50	5.76	6.18	7.3	International
William Grant's	William Grant & Sons	4.39	4.79	4.97	4.78	4.99	4.3	International
J&B Rare	Diageo	5.90	5.90	5.90	4.90	4.90	0.0	International
Chivas Regal	Pernod Ricard	3.95	4.37	4.57	3.87	4.50	16.3	International
Dewar's	Bacardi	3.40	3.50	3.41	3.24	3.27	0.9	International
William Peel	Belvédère	1.76	1.78	2.12	2.35	2.50	6.4	Domestic/Local
Bell's	Diageo	2.00	2.30	2.20	2.30	2.50	8.7	International
Label 5	La Martiniquaise	1.74	1.91	1.98	2.16	2.27	5.1	International
Teacher's Highland Cream	Beam Global Spirits & Wine	1.84	1.98	1.96	1.73	1.89	9.2	International
Clan Campbell	Pernod Ricard	1.56	1.64	1.72	1.76	1.76	0.0	Regional
100 Pipers	Pernod Ricard	2.94	2.50	2.25	2.03	1.73	-14.8	International
William Lawson's	Bacardi	1.30	1.30	1.50	1.59	1.69	6.3	International
Buchanan's	Diageo	1.30	1.60	1.50	1.30	1.50	15.4	Regional
Sir Edward's	Bardinet	1.26	1.27	1.05	1.09	1.19	9.0	International
Clan MacGregor	William Grant & Sons	1.22	1.26	1.32	1.32	1.15	-12.9	Regional
High Commissioner	Glen Catrine	0.50	0.60	0.90	1.00	1.10	10.0	Domestic/Local

## Millionaires Club 2011: Whiskies - India

BRAND	OWNER	2006	2007	2008	2009	2010	% +/-	STATUS
Bagpiper	United Spirits	13.02	13.95	15.41	16.26	16.39	0.8	Domestic/Local
Officer's Choice	Allied Blenders & Distillers	5.01	6.60	9.50	12.00	16.00	33.3	Domestic/Local
McDowell's No.1	United Spirits	8.65	11.46	13.39	13.52	14.32	5.9	Domestic/Local
Royal Stag	Pernod Ricard	4.24	5.63	6.76	8.40	10.39	23.7	Domestic/Local
Original Choice	John Distilleries	4.12	6.41	8.84	10.21	10.32	1.1	Domestic/Local
Old Tavern	United Spirits	2.55	2.84	4.77	6.84	9.08	32.7	Domestic/Local
Imperial Blue	Pernod Ricard	2.51	3.13	3.83	4.83	6.11	26.5	Domestic/Local
Hayward's	United Spirits	2.17	2.31	2.77	4.06	4.65	14.5	Domestic/Local
Director's Special	United Spirits	3.77	3.69	4.00	4.39	4.54	3.4	Domestic/Local
8PM	Radico Khaitan	4.15	4.16	3.76	3.18	3.94	23.9	Domestic/Local
Director's Special Black	United Spirits	0.90	1.34	1.77	2.03	2.88	41.9	Domestic/Local
Blenders Pride	Pernod Ricard	1.17	1.51	1.92	2.31	2.82	22.1	Domestic/Local
McDowell's Green Label	United Spirits	1.85	1.83	1.70	1.99	2.53	27.1	Domestic/Local
Gold Riband	United Spirits	1.72	1.63	1.84	2.68	2.25	-16.0	Domestic/Local
Signature	United Spirits	0.58	0.76	0.99	1.14	1.32	15.8	Domestic/Local
Royal Challenge	United Spirits	1.03	1.17	1.29	1.27	1.16	-8.7	Domestic/Local

## Millionaires Club 2011: Whiskies - North America

BRAND	OWNER	2006	2007	2008	2009	2010	% +/-	STATUS
Jack Daniel's	Brown-Forman	8.94	9.33	9.51	9.57	9.95	3.9	International
Jim Beam	Beam Global Spirits & Wine	5.12	5.24	5.16	5.08	5.30	4.3	International
Crown Royal	Diageo	4.70	5.00	5.10	4.80	5.00	4.2	International
Seagram's 7 Crown	Diageo	2.50	2.50	2.50	2.40	2.40	0.0	Regional
Black Velvet	Constellation Brands	2.11	1.91	1.96	2.04	2.07	1.5	Regional
Canadian Club	Beam Global Spirits & Wine	2.07	2.04	1.96	1.89	1.92	1.6	International
Canadian Mist	Brown-Forman	1.98	1.91	1.87	1.84	1.75	-4.8	Domestic/Local
Evan Williams	Heaven Hill	0.98	1.03	1.05	1.24	1.29	4.5	Domestic/local
Seagram's VO	Diageo	1.30	1.30	1.30	1.20	1.20	0.0	Regional
Maker's Mark	Beam Global Spirits & Wine	0.72	0.79	0.85	0.89	1.03	15.7	Domestic/Local
Windsor	Beam Global Spirits & Wine	1.00	0.98	0.98	1.01	1.01	0.0	Regional

## Millionaires Club 2011: Whiskies - Other countries

BRAND	OWNER	2006	2007	2008	2009	2010	% +/-	STATUS
Jameson	Pernod Ricard	2.18	2.48	2.73	2.74	3.17	15.7	International
Kakubin	Suntory	1.60	1.59	1.91	2.18	2.79	28.0	Regional
Black Nikka	Asahi Breweries	1.47	1.11	1.23	1.36	1.75	28.4	Regional
DYC	Beam Global Spirits & Wine	1.42	1.43	1.22	1.19	1.17	-1.7	Domestic/Local

Volume: Millions of 9-litre cases

# Vodka

**S**mirnoff comfortably remained the leading vodka brand in the world in 2010, despite seeing only minimal growth during the year. The brand suffered in its key markets, with declines in the UK and a continued struggle in the US against cheaper variants, with brands such as Svedka still seeing strong growth and taking share from the brand leader.

Beneath Smirnoff there was quite a

bit of change in the rankings. Ukrainian brand Khabniy Dar continued to see strong growth of 20% (equating to more than two million cases) to become the category's second biggest brand. The company has done this via taking share in its domestic market, especially from the former Ukrainian leader, Khortytza, but also through exporting the brand to its neighbours such as Russia and Belarus.

Khabniy Dar overtook the Russian-focused Zelenaya Marka

► p28



The company with the most Millionaire vodka brands is CEDC, its eight brands achieving a combined volume in 2010 of 24.91m cases - a little more than Smirnoff, topping the table on its own at 24.3m cases.



## Millionaires Club 2011: Top 30 Vodkas

BRAND	OWNER	2006	2007	2008	2009	2010	% +/-	STATUS
Smirnoff	Diageo	23.00	24.30	25.70	24.00	24.30	1.3	International
Khabniy Dar	Bayadera Group	1.55	3.57	6.63	10.20	12.30	20.6	Domestic/Local
Absolut	Pernod Ricard	9.80	10.73	10.73	10.03	10.90	8.7	International
Zelenaya Marka (Green Mark)	CEDC	7.30	8.10	11.97	11.25	10.85	-3.6	Domestic/Local
Nemiroff	Nemiroff Ukrainian Vodka Company	7.80	8.89	8.55	9.10	9.21	1.2	International
Khortytza	Khortytza Distillery	8.10	9.40	9.60	9.25	9.00	-2.7	International
Czysta de Luxe (ZG)	Stock Spirits Group	n/a	0.08	1.87	5.39	6.40	18.7	Domestic/Local
Pyat Ozer	Alcohol Siberian Group	2.38	6.04	6.50	6.10	6.30	3.3	Domestic/Local
Kristall	Minsk Kristall	3.46	3.82	4.11	4.51	4.92	9.1	Domestic/Local
Belenkaya	SY Group	1.89	2.04	2.25	2.81	4.92	74.7	Domestic/Local
Grey Goose	Bacardi	3.00	3.60	3.60	3.46	3.65	5.5	International
Svedka	Constellation Brands	1.02	1.53	2.10	2.90	3.41	17.6	Domestic/Local
Skyy	Gruppo Campari	2.70	2.90	3.15	3.25	3.35	3.1	International
Stolichnaya	Sojuzplodimport (SPI Spirits)	3.10	3.33	3.20	3.00	3.12	4.0	International
Sobieski	Belvédère	2.15	2.50	2.75	3.00	3.05	1.7	International
Finlandia	Brown-Forman	2.30	2.75	3.05	3.01	2.96	-1.6	International
Absolwent	CEDC	4.04	4.12	4.18	3.70	2.80	-24.3	Domestic/Local
Yamskaya	CEDC	n/a	n/a	2.16	2.40	2.61	8.8	Domestic/Local
Russian Standard	Roust	1.35	1.90	2.10	2.20	2.50	13.6	International
Parliament	CEDC	2.03	2.70	3.08	2.50	2.40	-4.0	Regional
Eristoff	Bacardi	1.50	1.70	1.80	1.90	2.27	19.5	International
Zhuravli	CEDC	n/a	n/a	2.55	2.36	2.15	-8.9	Domestic/Local
Glen's	Glen Catrine	1.70	1.70	1.80	1.90	2.10	10.5	Domestic/Local
Ketel One	Nolet Spirits	1.87	1.88	1.90	1.80	2.00	11.1	Domestic/Local
Krupnik	Belvédère	n/a	n/a	n/a	n/a	1.90	n/a	Domestic/Local
White Mischief	United Spirits	1.12	1.26	1.57	1.90	1.87	-1.6	Domestic/Local
Wyborowa	Pernod Ricard	1.17	1.78	2.32	2.12	1.83	-13.7	International
Magic Moments	Radico Khaitan	n/a	0.25	0.58	0.86	1.82	111.6	Domestic/Local
Zoladkowa Gorzka	Stock Spirits Group	1.19	1.36	1.71	1.80	1.80	0.0	Domestic/Local
1906	Stock Spirits Group	n/a	0.74	0.83	1.39	1.70	22.3	Domestic/Local

Volume: Millions of 9-litre cases



brand, which fell to fourth following a decline for a second year. It must be a concern for the brand's owners, CEDC, that it looks as if it may be going the way of so many standard and economy vodka brands in Russia of rapid growth followed by decline as consumers switch.

Zelenaya Marka's decline, combined with Absolut's return to growth, allowed the Swedish brand to move into third position. Given its maturity, the Pernod Ricard brand saw healthy growth thanks to a return to positive figures in its core US market, as well as continued strong growth in a large number of markets

**At +74.7%, the fastest growing vodka that was already a Millionaire brand was SY Group's Moscow-produced Belenkaya.**

around the world, such as Mexico and France. The Absolut brand is clearly benefitting from strong international distribution.

Other international brands returned to growth – in part as a bounce back from destocking issues in 2008 and 2009. The one brand that did not do so was Brown-Forman's Finlandia, which saw a slight decline, due in part at least to its change of distributor by the manufacturer in one of its key markets, Russia.

Other points of interest include the entry of the significant Belarusian brand Kristall and the continued

growth of Czysta de Luxe in Poland. The phenomenal growth in 2009 of the Stock Spirits flagship hit many other local Polish brands – something it continued to do in part in 2010, as witnessed by the continued decline of CEDC's Absolwent brand.

### Fastest growers

Stock Spirits' continuing new product development has allowed its new, more premium vodka brand Stock Prestige to lead the Fastest Growing chart. Growth of 400%, albeit from a low base, shows the company's marketing ability in tapping into consumer trends, especially in Poland.

The category's second fastest growing brand, Istynna, from Ukraine's Olimp, seems effectively to have replaced the company's Bilen'ka brand, which dropped out of the Millionaires table with volumes falling by 1.5 million cases in 2010. Third place in the fastest growth table is claimed by Radico Khaitan's Magic Moments, showing the sheer dynamism of the category in India, which grew by 19% in 2010.



## Millionaires Club 2011: Fastest Growing Vodkas

BRAND	OWNER	2006	2007	2008	2009	2010	% +/-	STATUS
Stock Prestige	Stock Spirits Group	0.00	0.00	0.00	0.20	1.00	<b>400.0</b>	Regional
Istynna	Olimp Corp	n/a	n/a	n/a	0.50	1.63	<b>226.0</b>	Domestic/Local
Magic Moments	Radico Khaitan	n/a	0.25	0.58	0.86	1.82	<b>111.6</b>	Domestic/Local
Belenkaya	SY Group	1.89	2.04	2.25	2.81	4.92	<b>74.7</b>	Domestic/Local
Luksusowa	Pernod Ricard	1.15	1.47	1.76	0.87	1.14	<b>31.0</b>	Domestic/Local
Romanov	United Spirits	0.81	0.98	1.17	1.25	1.59	<b>27.2</b>	Domestic/Local
1906	Stock Spirits Group	n/a	0.74	0.83	1.39	1.70	<b>22.3</b>	Domestic/Local
Khlibny Dar	Bayadera Group	1.55	3.57	6.63	10.20	12.30	<b>20.6</b>	Domestic/Local
Eristoff	Bacardi	1.50	1.70	1.80	1.90	2.27	<b>19.5</b>	International
Czysta de Luxe (ZG)	Stock Spirits Group	n/a	0.08	1.87	5.39	6.40	<b>18.7</b>	Domestic/Local
Svedka	Constellation Brands	1.02	1.53	2.10	2.90	3.41	<b>17.6</b>	Domestic/Local
Myagkov	SY Group	2.44	2.41	1.23	1.37	1.58	<b>15.0</b>	Regional
Zubrowka	CEDC	n/a	1.00	1.00	1.03	1.18	<b>14.6</b>	Regional
Russian Standard	Roust	1.35	1.90	2.10	2.20	2.50	<b>13.6</b>	International
Ketel One	Nolet Spirits	1.87	1.88	1.90	1.80	2.00	<b>11.1</b>	Domestic/Local
Glen's	Glen Catrine	1.70	1.70	1.80	1.90	2.10	<b>10.5</b>	Domestic/Local
Gorbatschow	Henkell & Söhnlein	1.21	1.46	1.09	1.27	1.40	<b>10.2</b>	Domestic/Local
Kristall	Minsk Kristall	3.46	3.82	4.11	4.51	4.92	<b>9.1</b>	Domestic/Local
Yamskaya	CEDC	n/a	n/a	2.16	2.40	2.61	<b>8.8</b>	Domestic/Local
Absolut	Pernod Ricard	9.80	10.73	10.73	10.03	10.90	<b>8.7</b>	International
Nemanoff	Grodnensky Likerovodochny	0.58	0.64	0.84	0.96	1.04	<b>8.3</b>	Domestic/Local
Prime	Olimp Corp	0.16	0.94	1.51	1.51	1.60	<b>6.0</b>	Domestic/Local
Three Olives	Proximo Spirits	0.63	0.85	1.10	1.25	1.32	<b>5.6</b>	Domestic/Local
Kamchatka	Beam Global Spirits & Wine	0.90	0.94	0.94	1.00	1.05	<b>5.5</b>	Domestic/Local
Grey Goose	Bacardi	3.00	3.60	3.60	3.46	3.65	<b>5.5</b>	International
Stolichnaya	Sojuzplodimport (SPI Spirits)	3.10	3.33	3.20	3.00	3.12	<b>4.0</b>	International
Pyat Ozer	Alcohol Siberian Group	2.38	6.04	6.50	6.10	6.30	<b>3.3</b>	Domestic/Local
Skyy	Gruppo Campari	2.70	2.90	3.15	3.25	3.35	<b>3.1</b>	International
Sobieski	Belvédère	2.15	2.50	2.75	3.00	3.05	<b>1.7</b>	International
Smirnoff	Diageo	23.00	24.30	25.70	24.00	24.30	<b>1.3</b>	International
Nemiroff	Nemiroff Ukrainian Vodka Company	7.80	8.89	8.55	9.10	9.21	<b>1.2</b>	International

Volume: Millions of 9-litre cases

# Millionaires



International vodkas reflect the economic times. In last year's Millionaires tables (volumes for 2009), seven of the 12 International vodkas were in negative growth. This year (2010 volumes) the trend is positive, with nine brands showing growth.

## Millionaires Club 2011: International Vodkas

BRAND	OWNER	2006	2007	2008	2009	2010	% +/-
Smirnoff	Diageo	23.00	24.30	25.70	24.00	24.30	1.3
Absolut	Pernod Ricard	9.80	10.73	10.73	10.03	10.90	8.7
Nemiroff	Nemiroff Ukrainian Vodka Company	7.80	8.89	8.55	9.10	9.21	1.2
Khortytza	Khortytza Distillery	8.10	9.04	9.60	9.25	9.00	-2.7
Grey Goose	Bacardi	3.00	3.60	3.60	3.46	3.65	5.5
Skyv	Gruppo Campari	2.70	2.90	3.15	3.25	3.35	3.1
Stolichnaya	Sojuzplodimport (SPI Spirits)	3.10	3.33	3.20	3.00	3.12	4.0
Sobieski	Belvédère	2.15	2.50	2.75	3.00	3.05	1.7
Finlandia	Brown-Forman	2.30	2.75	3.05	3.01	2.96	-1.6
Russian Standard	Roust	1.35	1.90	2.10	2.20	2.50	13.6
Eristoff	Bacardi	1.50	1.70	1.80	1.90	2.27	19.5
Wyborowa	Pernod Ricard	1.17	1.78	2.32	2.12	1.83	-13.7

## Millionaires Club 2011: Regional Vodkas

BRAND	OWNER	2006	2007	2008	2009	2010	% +/-
Parliament	CEDC	2.03	2.70	3.08	2.50	2.40	-4.0
Bols	CEDC	1.40	1.67	1.85	1.85	1.60	-13.5
Myagkov	SY Group	2.44	2.41	1.23	1.37	1.58	15.0
Soplica	CEDC	1.06	1.29	1.47	1.40	1.32	-5.7
Gordon's Vodka	Diageo	1.40	1.30	1.30	1.30	1.30	0.0
Zubrowka	CEDC	n/a	1.00	1.00	1.03	1.18	14.6
Stock Prestige	Stock Spirits Group	0.00	0.00	0.00	0.20	1.00	400.0

## Millionaires Club 2011: Top 20 Domestic/Local Vodkas

BRAND	OWNER	2006	2007	2008	2009	2010	% +/-
Khlibniy Dar	Bayadera Group	1.55	3.57	6.63	10.20	12.30	20.6
Zelenaya Marka (Green Mark)	CEDC	7.30	8.10	11.97	11.25	10.85	-3.6
Zysta de Luxe (ZG)	Stock Spirits Group	n/a	0.08	1.87	5.39	6.40	18.7
Pyat Ozer	Alcohol Siberian Group	2.38	6.04	6.50	6.10	6.30	3.3
Kristall	Minsk Kristall	3.46	3.82	4.11	4.51	4.92	9.1
Belenkaya	SY Group	1.89	2.04	2.25	2.81	4.92	74.7
Svedka	Constellation Brands	1.02	1.53	2.10	2.90	3.41	17.6
Absolwent	CEDC	4.04	4.12	4.18	3.70	2.80	-24.3
Yamskaya	CEDC	n/a	n/a	2.16	2.40	2.61	8.8
Zhuravli	CEDC	n/a	n/a	2.55	2.36	2.15	-8.9
Glen's	Glen Catrine	1.70	1.70	1.80	1.90	2.10	10.5
Ketel One	Nolet Spirits	1.87	1.88	1.90	1.80	2.00	11.1
Krupnik	Belvédère	n/a	n/a	n/a	n/a	1.90	n/a
White Mischief	United Spirits	1.12	1.26	1.57	1.90	1.87	-1.6
Magic Moments	Radico Khaitan	n/a	0.25	0.58	0.86	1.82	111.6
Zoladkova Gorzka	Stock Spirits Group	1.19	1.36	1.71	1.80	1.80	0.0
1906	Stock Spirits Group	n/a	0.74	0.83	1.39	1.70	22.3
Istynna	Olimp Corp	n/a	n/a	n/a	0.50	1.63	226.0
Prime	Olimp Corp	0.16	0.94	1.51	1.51	1.60	6.0
Romanov	United Spirits	0.81	0.98	1.17	1.25	1.59	27.2

Volume: Millions of 9-litre cases



# Rum & Cachaça

In 2010, for the first time in six years, the world's leading rum brand Bacardi returned to growth, with volumes up 4%. To what extent that is just a bounce back from destocking caused by the recent recession, time will tell. However, Bacardi still faces the same fundamental issues of maturity in its core western markets and the increasing interest of consumers globally in dark and golden rum.

The brand's number one spot came under increased pressure in 2010 from local Filipino brand Tanduay, which grew by 9% during the year. It is debatable how sustainable Tanduay's volumes will prove to be – benefiting though it did from a growing economy, it received a particular boost from the country holding two major national elections during the year. Elections boost alcohol consumption in the Philippines as it is given away and

consumed at election rallies, and later at victory celebrations.

Diageo's rum brands performed relatively poorly during the year. Its Cacique saw static volumes, primarily due to sharp declines in Spain caused by a mixture of the effects of the recession and the launch of a Cacique RTD variant.

More concerning must be the slowing of the growth of Diageo's global Captain Morgan brand. Volumes seem to be coming under increasing pressure in the dominant US market where it is losing volumes to cheaper variants. Equally importantly, its main growth driver of persuading beer consumers to switch to the brand has virtually stopped as financially stricken US consumers turned back to, or remained with, beer.

Diageo is increasingly reliant on Captain Morgan's smaller markets in Europe and elsewhere for growth, but

these are struggling to make up for the tough US market.

Pernod Ricard's Havana Club range performed better in 2010 with 15% growth, thanks to strength in the brand's domestic market, as well as France, Germany and Chile.

Unsurprisingly Indian rums continued to play a major part, accounting for seven of the 15 brands. More surprisingly, not all of them saw growth. This is perhaps due to the dynamic growth of the largest Indian rum brand, McDowell's No.1 Celebration – which added 2.7 million cases to its already dominant volumes – and the addition to the list of the rum variant of its well-known Bagpiper whisky.

In Latin America, cachaça continued steady progress, mainly due to the maturity of the domestic market, which dominates sales to the extent that only about 1.5% of production is exported. All brands were either static or saw low single-digit growth – the strongest being Pitú – although this was an improvement on last year and helped by consumers in the region returning having switched to beer during the economic difficulties of the preceding two years.



## Millionaires Club 2011: Rum

BRAND	OWNER	2006	2007	2008	2009	2010	% +/-	STATUS
Bacardi	Bacardi	20.00	19.90	19.64	18.60	19.28	3.7	International
Tanduay	Tanduay Distillers	12.40	14.43	16.29	16.92	18.36	8.5	Domestic/Local
McDowell's No.1 Celebration	United Spirits	6.17	7.63	9.67	11.17	13.89	24.4	Domestic/Local
Captain Morgan	Diageo	7.30	7.80	8.30	8.60	8.70	1.2	International
Havana Club	Pernod Ricard	2.61	3.00	3.40	3.28	3.77	14.9	International
Contessa	Radico Khaitan	2.50	2.08	2.20	2.56	2.37	-7.4	Domestic/Local
Old Cask	United Spirits	1.45	1.28	1.72	2.21	2.11	-4.5	Domestic/Local
Old Port Rum	Amrut Distilleries	1.38	1.64	1.91	1.66	1.82	9.6	Domestic/Local
Montilla	Pernod Ricard	2.72	2.67	2.73	1.95	1.80	-7.7	Domestic/Local
Cacique	Diageo	1.80	1.70	1.70	1.80	1.80	0.0	Regional
Bagpiper Rum	United Spirits	n/a	n/a	n/a	1.13	1.52	46.5	Domestic/Local
Madira XXX	Tilaknagar Industries	n/a	0.02	0.18	0.82	1.28	56.1	Domestic/Local
Appleton Jamaica Rum	Wray & Nephew	1.13	1.14	1.15	1.19	1.16	-2.8	International
Castillo	Bacardi	1.40	1.30	1.20	1.11	1.08	-2.7	Regional
Old Adventurer	United Spirits	1.22	1.12	1.20	1.23	1.05	-14.6	Domestic/Local

## Millionaires Club 2011: Cachaça

BRAND	OWNER	2006	2007	2008	2009	2010	% +/-	STATUS
Pirassununga 51	Companhia Müller de Bebidas	22.61	21.50	21.98	19.50	19.50	0.0	International
Pitú	Engarrafamento Pitú	8.53	9.31	9.51	9.60	10.10	5.2	International
Velho Barreiro	Tatuzinho	7.08	7.15	7.40	7.70	8.00	3.9	International
Ypioca	Grupo Ypioca	7.10	7.13	7.05	6.83	6.89	0.9	Domestic/Local

Volume: Millions of 9-litre cases

# Cognac & Brandy

All four cognac Millionaire brands saw growth during 2010 – a welcome turnaround from the record of recent years.

Having lost volumes in the previous couple of years, Pernod Ricard's Martell surged back with growth of 20%, primarily due to the brand's strong exposure to China and other markets in Asia Pacific. It is perhaps thanks to this that Martell is the only cognac brand with 2010 volumes greater than its pre-recession peak.

Booming sales in China and Asia helped the category's largest brand, Hennessy, grow by nearly 10%. Hennessy also benefited from a recovery of volumes in core western markets. Yet its greater size and exposure to the more mature markets of North America and western Europe slowed its rate of growth.

Courvoisier's strong growth in 2010 was primarily due to its core US and UK markets.

In the UK, Beam Global continues to invest £15 million annually in promotion and support for Courvoisier, instigating a mixability platform that is getting results in both the off and on-trades. The strength of Courvoisier and Hennessy in these western markets looks to have dampened the growth of Rémy Martin. The brand's 6% growth was driven by its exposure to China and other Asian countries, but it seems to have lost volumes in high volume markets such as the US and UK.

### Indian brandy dominates

Brandy is increasingly dominated by Indian brands in numbers as well as being

the category leading the rankings.

This is primarily due to Indian brandy sales accounting for more than 25% of the category's global sales and the concentration of the market compared with others.

United Spirits' McDowell's No.1 is by a very long way the world's biggest brandy. In 2010 it surged through the 11 million case barrier with growth of 25.2%, yet rival brands have each seen dramatic growth: second placed Mansion House up 36% and Radico Khaitan's Old Admiral up by 65%.

Apart from Indian brandies, the only other brand above the 3 million case mark, Campari's Brazilian brand Dreher, returned to growth as consumers traded back into the category.

More interesting has been the arrival of an International brand into this year's brandy Millionaires list. While a relatively small player, Torres – produced by the Spanish wine producer Miguel Torres – is well-known and has substantial sales not just in Spain but also Latin America.



## Millionaires Club 2011: Cognac

BRAND	OWNER	2006	2007	2008	2009	2010	% +/-	STATUS
Hennessy	LVMH	4.32	4.74	4.49	4.25	4.65	9.5	International
Martell	Pernod Ricard	1.46	1.61	1.54	1.46	1.75	19.9	International
Rémy Martin*	Rémy Cointreau	1.73	1.84	1.48	1.55	1.65	6.1	International
Courvoisier	Beam Global Spirits & Wine	1.14	1.17	1.19	1.02	1.20	17.6	International

\*Data from Rémy Cointreau annual reports 12 months Apr 2010-Mar 2011

## Millionaires Club 2011: Brandy

BRAND	OWNER	CATEGORY	2006	2007	2008	2009	2010	% +/-	STATUS
McDowell's No.1	United Spirits	Brandy - Indian	5.99	7.64	7.53	9.22	11.54	25.2	Domestic/Local
Mansion House	Tilaknagar Industries	Brandy - Indian	1.00	1.32	1.77	3.96	5.38	35.9	Domestic/Local
Honey Bee	United Spirits	Brandy - Indian	1.73	2.20	2.82	3.60	4.37	21.4	Domestic/Local
Dreher	Gruppo Campari	Brandy - Brazilian	3.50	3.75	3.60	3.45	3.50	1.4	Domestic/Local
Old Admiral	Radico Khaitan	Brandy - Indian	1.40	1.40	1.40	1.81	2.99	65.2	Domestic/Local
Torres	Miguel Torres	Brandy - Spanish	1.06	1.43	1.47	1.35	1.40	3.3	International
Paul Masson Grande Amber	Constellation Brands	Brandy - American	1.32	1.29	1.35	1.36	1.36	0.0	Domestic/Local
John Exshaw	United Spirits	Brandy - Indian	1.12	1.49	1.77	1.48	1.28	-13.5	Domestic/Local
Christian Brothers	Heaven Hill	Brandy - American	1.14	1.15	1.17	1.18	1.18	0.0	Domestic/Local

Volume: Millions of 9-litre cases

# Soju & Shochu

**D**espite the maturity of both the soju and shochu markets there is still room for plenty of change. The South Korean soju market was of particular interest, with a number of brands seeing either strong growth or decline.

Lotte Liquor continued to see good growth for its eponymous brand thanks to its continued aggressive promotional push into the city of Busan in the Gyeongsang area, the stronghold of Daesun distillery.

Daesun and its C1 brand suffered a steep decline of 21% because of this, but also due to weakness in the company itself, caused by management problems that led in April 2011 to the company being taken over.

This weakness in Daesun also allowed

Muhak – the other company whose strength is in the Gyeongsang area – to see dynamic growth at its local rival's expense – although Muhak also benefited from the success of its lower-alcohol variant.

In Japan there have been equally big changes which have seen Suntory's Dai Jyuhyo's volumes fall from more than 4 million cases in 2010 to drop out of the list altogether. The brand's volumes were partly replaced by another economy shochu, Muginoka, which came in with 2010 sales of 1.6 million cases.

This dramatic change seems to be part of a trend apparent in other categories, in which brands – especially in the economy segment – have a remarkably short shelf-life and are replaced with new variants. This phenomenon has been particularly apparent in recent years in Japanese economy beer.



## Millionaires Club 2011: Shochu

BRAND	OWNER	2006	2007	2008	2009	2010	% +/-	STATUS
lichiko	Sanwa Shurui	9.86	9.88	9.14	8.74	8.32	-4.8	Domestic/Local
Kanoka	Asahi Breweries	3.02	3.44	3.56	3.66	3.84	5.0	Domestic/Local
Daigoro	Asahi Breweries	5.24	4.66	4.44	4.17	3.74	-10.3	Domestic/Local
Big Man	Oenon Holdings Corp	n/a	n/a	2.53	2.43	2.11	-13.2	Domestic/Local
Mugi Zakari	Oenon Holdings Corp	0.20	0.36	0.96	1.60	1.78	11.3	Domestic/Local
Muginoka	Suntory	n/a	n/a	n/a	n/a	1.66	n/a	Domestic/Local

## Millionaires Club 2011: Soju

BRAND	OWNER	2006	2007	2008	2009	2010	% +/-	STATUS
Jinro	Jinro Limited	72.05	69.84	75.99	63.98	64.28	0.5	Domestic/Local
Lotte Liquor	Lotte Liquor BG	17.6	19.0	19.9	21.2	22.6	6.5	Domestic/Local
Charm	Kumbokju	12.16	12.25	12.28	11.61	11.07	-4.7	Domestic/Local
Muhak White	Muhak	9.99	10.56	10.92	11.04	12.96	17.4	Domestic/Local
C1	Daesun Distilling Co	10.3	10.4	10.52	9.78	7.70	-21.3	Domestic/Local

Volume: Millions of 9-litre cases

# Other Categories

**L**iqueurs continued to suffer in 2010, despite a number of prominent brands returning to growth. The undisputed category leader, Baileys, managed to achieve moderate growth of 3%, but its volumes are still around a million cases less than they were at their peak in 2007. The brand continues to be squeezed by cheaper variants in its main US market, but is also facing the difficulty of brand maturity in many of its core markets, with the innovation of new flavours proving a successful strategy in sustaining sales.

Second-placed De Kuyper suffered a decline, primarily due to ongoing slackness in the on-trade in its largest market – the US.

While Brown-Forman's Southern Comfort benefited from a moderate bounce back in volumes in key markets such as the US, it also slipped overall by nearly 4%.

The most dynamic growth came from the local Polish brand Lubelska, owned by Stock Spirits. Lubelska's range of

different flavours, such as lemon and cherry, have proved popular when mixed with Sprite.

The other brand to perform well was Distell's cream liqueur, Amarula. Its 9% growth was driven by Latin America, where the company invested a lot of time and effort in promoting the brand in conjunction with the South Africa 2010 Football World Cup.

## Gin gaining a premium

Gin looks healthier this year, with premium brands such as Bombay and Tanqueray returning to growth. The latter's performance was thanks to strong growth in Spain and the UK. Beefeater also earned strong growth for Pernod Ricard, fighting the tough conditions to achieve a positive result in Spain.

The more standard



brands, Gordon's and Seagrams, saw stagnation and decline respectively. For both this was primarily due to falling sales in the US, with the brands being squeezed by up-and-coming locals such as Gallo's New Amsterdam.

All the tequila brands that agreed to take part saw volume growth during 2010. Sauza tequila was the most dynamic, almost regaining its losses from 2009 thanks to a very good performance in the US.

The premium contender, Patrón, continued to grow, albeit at a more moderate level as US consumers' concerns about price continued. And El Jimador continued to benefit from being in Brown-Forman's distribution system.

## Millionaires Club 2011: Liqueurs

BRAND	OWNER	2006	2007	2008	2009	2010	% +/-	STATUS
Baileys	Diageo	7.10	7.70	7.60	6.40	6.60	3.1	International
De Kuyper range	Koninklijke De Kuyper/Beam Global	4.90	4.90	4.74	4.40	4.32	-1.8	International
Malibu	Pernod Ricard	3.33	3.63	3.70	3.23	3.40	5.3	International
Southern Comfort	Brown-Forman	2.45	2.48	2.38	2.23	2.14	-3.9	International
Kahlúa	Pernod Ricard	2.17	2.14	2.00	1.69	1.70	0.6	International
Lubelska	Stock Spirits Group	n/a	0.29	0.5	0.6	1.5	150.0	Domestic/Local
Bols range	Lucas Bols	1.21	1.26	1.28	1.30	1.40	7.7	International
Amarula	Distell Group	0.93	1.08	1.08	1.10	1.20	9.1	International

## Millionaires Club 2011: Gin

BRAND	OWNER	2006	2007	2008	2009	2010	% +/-	STATUS
Gordon's	Diageo	5.00	4.50	4.30	4.20	4.20	0.0	International
Seagram's	Pernod Ricard	3.44	3.44	3.38	3.03	2.93	-3.3	Regional
Beefeater	Pernod Ricard	2.32	2.42	2.41	2.24	2.33	4.0	International
Bombay	Bacardi	2.10	2.00	2.00	1.97	2.15	9.1	International
Tanqueray	Diageo	2.00	2.20	2.10	1.90	2.00	5.3	International
Blue Riband	United Spirits	0.95	0.96	0.99	1.09	1.13	3.7	Domestic/Local

## Millionaires Club 2011: Tequila

BRAND	OWNER	2006	2007	2008	2009	2010	% +/-	STATUS
Sauza	Beam Global	3.12	3.21	3.13	2.63	3.02	14.8	International
Patrón	Patrón Spirits	1.15	1.60	1.73	1.74	1.76	1.1	Domestic/Local
El Jimador	Brown-Forman	n/a	0.92	1.02	1.10	1.19	8.1	Domestic/Local

Volume: Millions of 9-litre cases

# Millionaires

**A**mong the bitters, leading brand Jägermeister saw slight growth in 2010. The brand continued to decline in its lead market, the US, but this was countered by dynamic growth in a number of western European markets, notably the UK and the Netherlands.

Germany seemed to be the key to the dynamic growth of both the Amaro Ramazzotti and Aperol brands, with the former bouncing back to its 2008 level overall. Gruppo Campari's Aperol, however, continued on its upward path,

driven by Germany, but also helped by Austria and its domestic market. The bitters has proved a great hit as part of a spritzer cocktail mixed with prosecco.

Campari's growth in 2010 was driven by volumes bouncing back in its major markets, primarily the larger ones of Italy, Germany and Brazil.

Of the other spirits categories, anis continued to struggle, with Pernod Ricard's two brands – Ricard and Pastis 51 – seeing slight growth and declines respectively due to the continued shrinking of the category. Ricard's growth was driven by capturing share from other brands.



## Millionaires Club 2011: Bitters

BRAND	OWNER	2006	2007	2008	2009	2010	% +/-	STATUS
Jägermeister	Mast-Jägermeister	5.95	6.32	6.41	6.41	6.58	2.7	International
Fernet Branca	Fratelli Branca Distillerie	2.90	3.12	3.28	3.31	3.85	16.3	International
Campari	Gruppo Campari	2.90	2.93	2.93	2.70	2.80	3.7	International
Aperol	Gruppo Campari	1.00	1.15	1.30	1.65	1.95	18.2	Regional
Amaro Ramazzotti	Pernod Ricard	1.27	1.18	1.22	1.00	1.23	23.0	Regional

## Millionaires Club 2011: Other categories

BRAND	OWNER	2006	2007	2008	2009	2010	% +/-	STATUS
<b>Aguardiente</b>								
Nectar	La Empresa Cundinamarca	1.31	1.37	1.31	1.39	1.51	8.8	Domestic/Local
<b>Anis</b>								
Ricard	Pernod Ricard	5.66	5.78	5.52	5.37	5.38	0.2	International
Pastis 51	Pernod Ricard	1.53	1.49	1.41	1.34	1.27	-5.2	Regional
<b>Baijiu</b>								
Kinmen Kaoliang	Kinmen Kaoliang Liquor	1.81	1.88	2.15	2.03	2.15	5.9	Domestic/Local
<b>Pisco</b>								
Capel	Capel Coop. de Elqui	1.35	1.32	1.37	1.11	1.07	-3.6	Domestic/Local

Volume: Millions of 9-litre cases

# Major players

**M**any of the International players found 2010 a better year. Pernod Ricard – now sharing its position as the company with the most brands in the list – saw growth from 15 of its brands, led by Indian whisky Imperial Blue. The dynamic return to growth of its Luksusowa vodka allowed it to bring its numbers in the list back up to 21. Many Pernod Ricard brands saw strong double-digit growth, thanks primarily to their strong exposure to growing markets in Asia Pacific.

While none of Diageo's 14 Millionaire brands saw a decline, neither did they see particularly strong growth, and only one – Scotch whisky Buchanan's, strong in South America – achieved double-digit growth. Next strongest, however, was its iconic International brand Johnnie Walker, with a creditable figure of +9.7%.

Bacardi also saw more positive results, thanks in part to recovery in the US, but two of its brands in particular enjoyed notable growth – Eristoff vodka and Bombay gin. The latter can be seen as a particular achievement, with the brand's strength being in low-growth markets.

Beam Global also had a strong year, doing particularly well in its domestic

market with strong growth of its Jim Beam, Sauza and Maker's Mark brands. In contrast, Brown-Forman suffered in the US with its Jack Daniel's and Southern Comfort brands declining there, with resulting effects on their global performance.

### Local Players

United Spirits – part of Vijay Mallya's UB Group empire – is by far and away the biggest local player and, with 20 brands on the list, now lies only one behind Pernod Ricard. The company continued to see strong growth with a number of its brands in 2010, but also saw declines with others. This was possibly a result of increased competition from rivals such as ABD's Officer's Choice and Pernod Ricard's Royal Stag, and a focusing of United's resources on a more select range of its own brands.

After United Spirits, in terms of numbers of brands, CEDC is the second biggest company. The company had a weak performance in 2010, only seeing growth for its economy-level Russian brand Yamskaya and regional brand Zubrowka – the bison grass-flavoured vodka popular among bar professionals in western markets.

Its Polish brands, such as Absolwent

and Bols, continued to suffer at the hands of rival Stock Spirits, whose major brands continued to grow at the expense of the CEDC portfolio – among others. With high growth figures from a small base, Stock also managed to add two new brands to the Millionaires list: Stock Prestige vodka and the fruit-flavoured vodka liqueur range, Lubelska.



### Millionaires Club 2011: Pernod Ricard

BRAND	CATEGORY	2006	2007	2008	2009	2010	% +/-	STATUS
<b>Absolut</b>	Vodka	9.80	10.73	10.73	10.03	10.90	<b>8.7</b>	International
<b>Royal Stag</b>	Whisky - Indian	4.24	5.63	6.76	8.40	10.39	<b>23.7</b>	Domestic/Local
<b>Ballantine's</b>	Whisky - Scotch	5.62	6.17	6.50	5.76	6.18	<b>7.3</b>	International
<b>Imperial Blue Ricard</b>	Whisky - Indian	2.51	3.13	3.83	4.83	6.11	<b>26.5</b>	Domestic/Local
<b>Chivas Regal</b>	Whisky - Scotch	3.95	4.37	4.57	3.87	4.50	<b>16.3</b>	International
<b>Havana Club</b>	Rum	2.61	3.00	3.40	3.28	3.77	<b>14.9</b>	International
<b>Malibu</b>	Liqueurs	3.33	3.63	3.70	3.23	3.40	<b>5.3</b>	International
<b>Jameson</b>	Whiskey - Irish	2.18	2.48	2.73	2.74	3.17	<b>15.7</b>	International
<b>Seagram's</b>	Gin	3.44	3.44	3.38	3.03	2.93	<b>-3.3</b>	Regional
<b>Blenders Pride</b>	Whisky - Indian	1.17	1.51	1.92	2.31	2.82	<b>22.1</b>	Domestic/Local
<b>Beefeater</b>	Gin	2.32	2.42	2.41	2.24	2.33	<b>4.0</b>	International
<b>Wyborowa</b>	Vodka	1.17	1.78	2.32	2.12	1.83	<b>-13.7</b>	International
<b>Montilla</b>	Rum	2.72	2.67	2.73	1.95	1.80	<b>-7.7</b>	Domestic/Local
<b>Clan Campbell</b>	Whisky - Scotch	1.56	1.64	1.72	1.76	1.76	<b>0.0</b>	Regional
<b>Martell</b>	Cognac	1.46	1.61	1.54	1.46	1.75	<b>19.9</b>	International
<b>100 Pipers</b>	Whisky - Scotch	2.94	2.50	2.25	2.03	1.73	<b>-14.8</b>	International
<b>Kahlúa</b>	Liqueurs	2.17	2.14	2.00	1.69	1.70	<b>0.6</b>	International
<b>Pastis 51</b>	Anis	1.53	1.49	1.41	1.34	1.27	<b>-5.2</b>	Regional
<b>Amaro Ramazzotti</b>	Bitters	1.27	1.18	1.22	1.00	1.23	<b>23.0</b>	Regional
<b>Luksusowa</b>	Vodka	1.15	1.47	1.76	0.87	1.14	<b>31.0</b>	Domestic/Local



## Millionaires Club 2011: United Spirits

BRAND	CATEGORY	2006	2007	2008	2009	2010	% +/-	STATUS
Bagpipier	Whisky - Indian	13.02	13.95	15.41	16.26	16.39	0.8	Domestic/Local
McDowell's No.1	Whisky - Indian	8.65	11.46	13.39	13.52	14.32	5.9	Domestic/Local
McDowell's No.1 Celebration	Rum	6.17	7.63	9.67	11.17	13.89	24.4	Domestic/Local
McDowell's No.1	Brandy - Indian	5.99	7.64	7.53	9.22	11.54	25.2	Domestic/Local
Old Tavern	Whisky - Indian	2.55	2.84	4.77	6.84	9.08	32.7	Domestic/Local
Hayward's	Whisky - Indian	2.17	2.31	2.77	4.06	4.65	14.5	Domestic/Local
Director's Special	Whisky - Indian	3.77	3.69	4.00	4.39	4.54	3.4	Domestic/Local
Honey Bee	Brandy - Indian	1.73	2.20	2.82	3.60	4.37	21.4	Domestic/Local
Director's Special Black	Whisky - Indian	0.90	1.34	1.77	2.03	2.88	41.9	Domestic/Local
McDowell's Green Label	Whisky - Indian	1.85	1.83	1.70	1.99	2.53	27.1	Domestic/Local
Gold Riband	Whisky - Indian	1.72	1.63	1.84	2.68	2.25	-16.0	Domestic/Local
Old Cask	Rum	1.45	1.28	1.72	2.21	2.11	-4.5	Domestic/Local
White Mischief	Vodka	1.12	1.26	1.57	1.90	1.87	-1.6	Domestic/Local
Romanov	Vodka	0.81	0.98	1.17	1.25	1.59	27.2	Domestic/Local
Bagpipier Rum	Rum	n/a	n/a	n/a	0.99	1.45	46.5	Domestic/Local
Signature	Whisky - Indian	0.58	0.76	0.99	1.14	1.32	15.8	Domestic/Local
John Exshaw	Brandy - Indian	1.12	1.49	1.77	1.48	1.28	-13.5	Domestic/Local
Royal Challenge	Whisky - Indian	1.03	1.17	1.29	1.27	1.16	-8.7	Domestic/Local
Blue Riband	Gin	0.95	0.96	0.99	1.09	1.13	3.7	Domestic/Local
Old Adventurer	Rum	1.22	1.12	1.20	1.23	1.05	-14.6	Domestic/Local

## Millionaires Club 2011: Diageo

BRAND	CATEGORY	2006	2007	2008	2009	2010	% +/-	STATUS
Smirnoff	Vodka	23.00	24.30	25.70	24.00	24.30	1.3	International
Johnnie Walker	Whisky - Scotch	14.30	15.80	16.30	14.50	15.90	9.7	International
Captain Morgan	Rum	7.30	7.80	8.30	8.60	8.70	1.2	International
Baileys	Liqueurs	7.10	7.70	7.60	6.40	6.60	3.1	International
Crown Royal	Whisky - Canadian	4.70	5.00	5.10	4.80	5.00	4.2	International
J&B Rare	Whisky - Scotch	5.90	5.90	5.90	4.90	4.90	0.0	International
Gordon's	Gin	5.00	4.50	4.30	4.20	4.20	0.0	International
Bell's	Whisky - Scotch	2.00	2.30	2.20	2.30	2.50	8.7	International
Seagram's 7 Crown	Whiskey - American - Other	2.50	2.50	2.50	2.40	2.40	0.0	Regional
Tanqueray	Gin	2.00	2.20	2.10	1.90	2.00	5.3	International
Cacique	Rum	1.80	1.70	1.70	1.80	1.80	0.0	Regional
Buchanan's	Whisky - Scotch	1.30	1.60	1.50	1.30	1.50	15.4	Regional
Gordon's Vodka	Vodka	1.40	1.30	1.30	1.30	1.30	0.0	Regional
Seagram's VO	Whisky - Canadian	1.30	1.30	1.30	1.20	1.20	0.0	Regional

## Millionaires Club 2011: Beam Global

BRAND	CATEGORY	2006	2007	2008	2009	2010	% +/-	STATUS
Jim Beam	Whiskey - American - Bourbon	5.12	5.24	5.16	5.08	5.30	4.3	International
Sauza	Tequila	3.12	3.21	3.13	2.63	3.02	14.8	International
Canadian Club	Whisky - Canadian	2.07	2.04	1.96	1.89	1.92	1.6	International
Teacher's Highland Cream	Whisky - Scotch	1.84	1.98	1.96	1.73	1.89	9.2	International
Courvoisier	Cognac	1.14	1.17	1.19	1.02	1.20	17.6	International
DYC	Whisky - Spanish	1.42	1.43	1.22	1.19	1.17	-1.7	Domestic/Local
Kamchatka	Vodka	0.90	0.94	0.94	1.00	1.05	5.5	Domestic/Local
Maker's Mark	Whiskey - American - Bourbon	0.72	0.79	0.85	0.89	1.03	15.7	Domestic/Local
Windsor	Whisky - Canadian	1.00	0.98	0.98	1.01	1.01	0.0	Regional

## Millionaires Club 2011: CEDC

BRAND	CATEGORY	2006	2007	2008	2009	2010	% +/-	STATUS
Zelenaya Marka (Green Mark)	Vodka	7.30	8.10	11.97	11.25	10.85	-3.6	Domestic/Local
Absolwent	Vodka	4.04	4.12	4.18	3.70	2.80	-24.3	Domestic/Local
Yamskaya	vodka	n/a	n/a	2.16	2.4	2.61	8.8	Domestic/Local
Parliament	Vodka	2.03	2.70	3.08	2.50	2.40	-4.0	Regional
Zhuravli	vodka	n/a	n/a	2.55	2.36	2.15	-8.9	Domestic/Local
Bols	Vodka	1.40	1.67	1.85	1.85	1.60	-13.5	Regional
Soplica	Vodka	1.06	1.29	1.47	1.40	1.32	-5.7	Regional
Zubrowka	vodka	n/a	1.00	1.00	1.03	1.18	14.6	Regional

Volume: Millions of 9-litre cases

# Millionaires

## Millionaires Club 2011: Bacardi

BRAND	CATEGORY	2006	2007	2008	2009	2010	% +/-	STATUS
Bacardi	Rum	20.00	19.90	19.64	18.60	19.28	3.7	International
Grey Goose	Vodka	3.00	3.60	3.60	3.46	3.65	5.5	International
Dewar's	Whisky - Scotch	3.40	3.50	3.41	3.24	3.27	0.9	International
Eristoff	Vodka	1.50	1.70	1.80	1.90	2.27	19.5	International
Bombay	Gin	2.10	2.00	2.00	1.97	2.15	9.1	International
William Lawson's	Whisky - Scotch	1.30	1.30	1.50	1.59	1.69	6.3	International
Castillo	Rum	1.40	1.30	1.20	1.11	1.08	-2.7	Regional

## Millionaires Club 2011: Brown-Forman

BRAND	CATEGORY	2006	2007	2008	2009	2010	% +/-	STATUS
Jack Daniel's	Whiskey - Tennessee	8.94	9.33	9.51	9.57	9.95	3.9	International
Finlandia	Vodka	2.30	2.75	3.05	3.01	2.96	-1.6	International
Southern Comfort	Liqueurs	2.45	2.48	2.38	2.23	2.14	-3.9	International
Canadian Mist	Whisky - Canadian	1.98	1.91	1.87	1.84	1.75	-4.8	Domestic/Local
El Jimador	Tequila	n/a	0.92	1.02	1.10	1.19	8.1	Domestic/Local

## Millionaires Club 2011: Gruppo Campari

BRAND	CATEGORY	2006	2007	2008	2009	2010	% +/-	STATUS
Dreher	Brandy - Brazilian	3.50	3.75	3.60	3.45	3.50	1.4	Domestic/Local
Skyy	Vodka	2.70	2.90	3.15	3.25	3.35	3.1	International
Campari	Bitters	2.90	2.93	2.93	2.70	2.80	3.7	International
Aperol	Bitters	1.00	1.15	1.30	1.65	1.95	18.2	Regional

## Millionaires Club 2011: Belvédère

BRAND	CATEGORY	2006	2007	2008	2009	2010	% +/-	STATUS
Sobieski	Vodka	2.15	2.50	2.75	3.00	3.05	1.7	International
William Peel	Whisky - Scotch	1.76	1.78	2.12	2.35	2.50	6.4	Domestic/Local
Krupnik	Vodka	n/a	n/a	n/a	n/a	1.90	n/a	Domestic/Local
Starogardzka	Vodka	2.65	2.85	3.01	2.00	1.50	-25.0	Domestic/Local

## Millionaires Club 2011: Stock Spirits Group

BRAND	CATEGORY	2006	2007	2008	2009	2010	% +/-	STATUS
Czysta de Luxe (ZG)	Vodka	n/a	0.08	1.87	5.39	6.40	18.7	Domestic/Local
Zoladkowa Gorzka	Vodka	1.19	1.36	1.71	1.80	1.80	0.0	Domestic/Local
1906	Vodka	n/a	0.74	0.83	1.39	1.70	22.3	Domestic/Local
Lubelska	Liqueurs	n/a	0.29	0.50	0.60	1.50	150.0	Domestic/Local
Stock Prestige	Vodka	0.00	0.00	0.00	0.20	1.00	400.0	Regional

## Millionaires Club 2011: Radico Khaitan

BRAND	CATEGORY	2006	2007	2008	2009	2010	% +/-	STATUS
8PM	Whisky - Indian	4.15	4.16	3.76	3.18	3.94	23.9	Domestic/Local
Old Admiral	Brandy - Indian	1.40	1.40	1.40	1.81	2.99	65.2	Domestic/Local
Contessa	Rum	2.50	2.08	2.20	2.56	2.37	-7.4	Domestic/Local
Magic Moments	Vodka	0.003	0.25	0.58	0.86	1.82	111.6	Domestic/Local

## Millionaires Club 2011: Constellation

BRAND	CATEGORY	2006	2007	2008	2009	2010	% +/-	STATUS
Svedka	Vodka	1.02	1.53	2.10	2.90	3.41	17.6	Domestic/Local
Black Velvet	Whisky - Canadian	2.11	1.91	1.96	2.04	2.07	1.5	Regional
Paul Masson Grande Amber	Brandy - American	1.32	1.29	1.35	1.36	1.36	0.0	Domestic/Local

## Millionaires Club 2011: William Grant & Sons

BRAND	CATEGORY	2006	2007	2008	2009	2010	% +/-	STATUS
William Grant's	Whisky - Scotch	4.39	4.79	4.97	4.78	4.99	4.3	International
Clan MacGregor	Whisky - Scotch	1.22	1.26	1.32	1.32	1.15	-12.9	Regional

Volume: Millions of 9-litre cases