

# Millionaires

## 2008



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## Introduction

# The best statistical guide to moves in global spirits brands

Welcome to the Drinks International Millionaires supplement of 2008 – the only publication of its kind. This supplement contains a comprehensive listing of the year-on-year sales performance of spirits brands worldwide with sales exceeding one million 9-litre cases.

The Millionaires Club was launched by Drinks International some 12 years ago and has grown into an invaluable reference tool for the industry – an indicator of trends and a barometer for the global spirits sector as well as for the health of individual brands.

The Drinks International editorial team, all those years ago, felt there was a lack of reliable, independent, statistical information. As good journalists, in their reporting for the magazine they wanted to know just how well specific brands were performing and where in the world they were being sold – domestically, regionally or internationally.

### Time for change

It was decided the magazine would commission this research itself and that the criteria for inclusion in the listing would be sales of one million 9-litre cases or over.

These figures do not represent shipments or depletions, but actual sales as verified by sources within each individual company. If official data is not available, brands are not included – there are no estimates.

For many years Pat Brazzier of PASH Beverage Research produced this information

**Felicity Murray**

Drinks International editor



exclusively for Drinks International, but the Millionaires beast is now so large and influential that we have sought the help of a larger organisation to gather the figures.

### Euromonitor on board

So this year we're delighted to announce Millionaires has been given added punch through our new partnership with Euromonitor International.

The research company's involvement reinforces the credibility of the Millionaires statistics. With Euromonitor's researchers located in offices all around the world, this year's listing includes some interesting new companies and brands from the far reaches of the globe.

We have also moved distribution definitions in line with those of Euromonitor.

They are: Domestic/Local – whereby 90 per cent or more of a brand's volumes are sold in a particular country; Regional – 80 per cent or more of a brand's volumes are sold in a particular region; and International – the brand is sold in at least two regions with no more than 79.9 per cent sold in its biggest region.

## Independently researched market intelligence

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

on trends and opportunities in the industry, as well as news analysis from industry experts. Our global information system, Passport, is used by the world's leading alcoholic drinks companies to support a stronger understanding of global markets and the strategic business planning process. We offer a complete picture of the commercial environment by monitoring markets, related industries, operating conditions and



making sense of global markets

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

For more information, please contact Michael Jones on +44 (0)20 7251 8024 ext. 3403 or at [michael.jones@euromonitor.com](mailto:michael.jones@euromonitor.com)

# New classification shows listing in detail

Assessing this year's tables, Jeremy Cunnington – Euromonitor International's senior company analyst, alcoholic drinks – highlights the impact of Local/Domestic on the 2008 Millionaires Club



making sense of global markets

According to Merrill Lynch/Cap Gemini's World Wealth Report 2007, the number of US dollar millionaires rose by over 8 per cent in 2006 (the latest year in the report). Similarly, this year's Drinks International Millionaires Club listing has expanded, with the number of brands and their total volumes continuing to rise.

There are 159 brands, with total sales exceeding 665 million 9-litre cases in the 2008 list, up from last year's 151 brands at 624 million cases. Note that brand volumes represent actual sales verified from a company source.

The 2008 Millionaires list also has a much wider geographic spread this year. For the first time it takes in a Pisco brand from Chile, baijiu brands from China and Taiwan and the first brand from Africa, Amarula cream liqueur.

Traditionally, the Millionaires tables have been divided into International and Regional brands, but this year we have introduced a third classification, Domestic/Local, to give a more detailed picture. Domestic/Local brands are those with 90 per cent or more of volumes sold in a particular country; Regionals are those with 80 per cent or more of volumes sold in a particular region, while Internationals are those sold in at least two regions and no more than 79.9 per cent sold in its biggest region.

Domestic/Local brands are the most prevalent in the list, with 77 entries, with International brands accounting for 60 brands and Regional brands making up the balance. Despite the steps being made by international companies to push their leading brands into new markets, this shows that the global spirits market still revolves around Domestic/Local brands. About half of the

volumes in this list come from this sector – a figure that underplays its role in total spirits, bearing in mind the number of Domestic/Local brand producers – most notably in Asia-Pacific – that didn't wish to participate in the list this year.

Equally importantly, the share of actual volume sales of Domestic/Local brands has risen between 2003 and 2007, by nearly four percentage points, despite International brands seeing growth of nearly 24 per cent during that period. The main reason for this seems to be the dynamic growth of the Indian spirits market and the rise of brands in Russia and the Ukraine, as governments there attempt to clamp down on the black market for spirits.

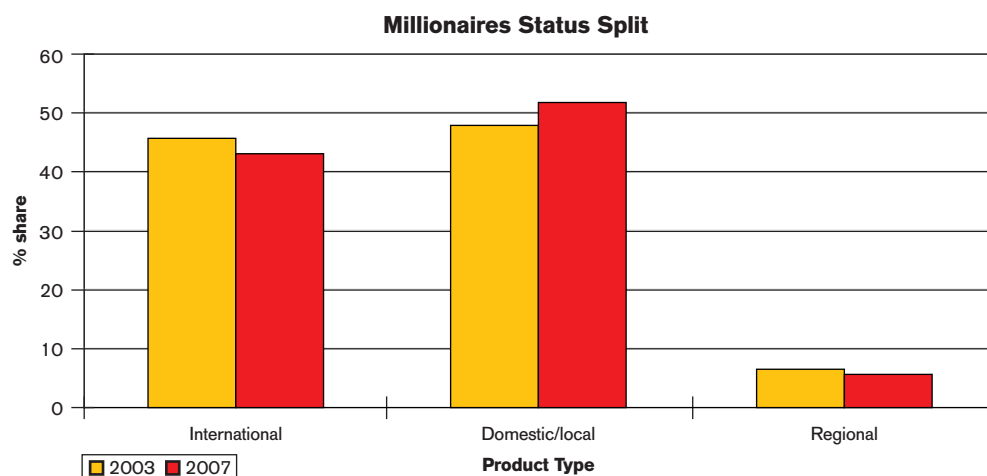
Pernod Ricard is still the company with most brands on the list, at 20, but that is down one

from last year, as the Hiram Walker liqueur brand has fallen below the million-case mark. In joint second place are Diageo and United Spirits, both with 16 brands. Diageo's number remains unaltered from last year, while United Spirits has added White Mischief vodka and Director's Special Black Indian whisky.

The global spirits market grew by 2.2 per cent in 2007. Growth was driven by the US, up 4.4 per cent, and Asia-Pacific, up 3.4 per cent, but in value terms, eastern Europe and Latin America saw the most dynamic growth as consumers traded up, particularly international brands.

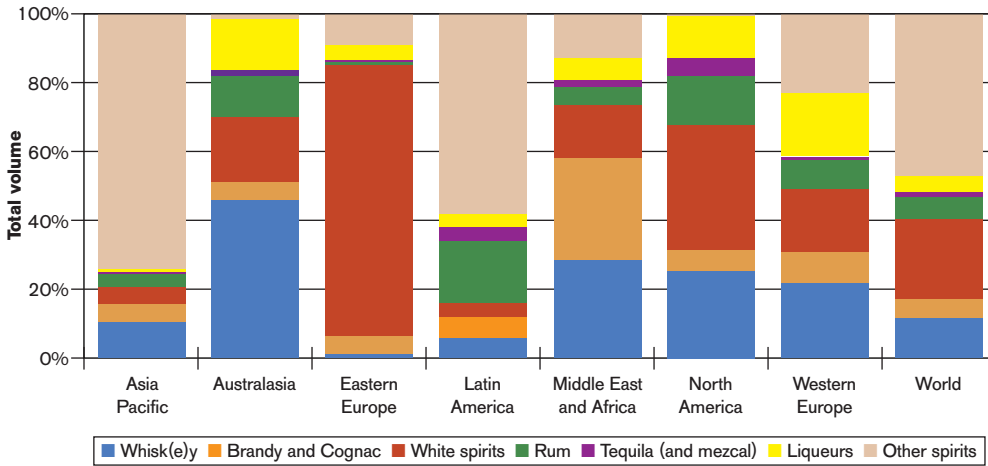
## The categories

By far the largest sector in 2007 remained "other spirits", accounting for 47 per cent of total



# Overview

Regional Distribution by sector



Brands in Russia can have a brief life, as witnessed by former Millionaires Club member Flagship, which dipped below a million cases in 2007

volumes. The sector is made up of a wide range of products, such as anis, soju, sochu, baijiu and cachaça, which mainly consist of Domestic/Local brands. However, companies are looking to expand their brands coverage, as witnessed by Pernod Ricard's positioning of its Ricard's anis-based spirits brand as one of its key 15 strategic brands and, more recently, Thai Beverage's launch of Mekhong whisky in the UK and the US.

Vodka continues to be the dominant sector in the list, although only two of the 37 brands represented are in the overall top 10 (Smirnoff and Absolut). In 2007, global vodka volumes increased by 2 per cent, with growth in every region except Africa and the Middle East. Growth was driven in particular by the US, Western Europe and Asia-Pacific. Consequently, both International brands and Domestic/Local brands are seeing good growth, with the US-centric Svedka brand up by 48 per cent and International brand Absolut growing by 10 per cent.

Yet the most dynamic growth in vodka comes in Russia, as witnessed by the 154 per cent growth of Pyat Ozer. But brands in Russia can have a brief life, as witnessed by the former member of the Millionaires Club, Flagship. This entered the list in 2000 with volumes of 0.59 million cases and saw rapid growth until 2004, where it peaked at 3.76 million, before dipping in 2007 to 0.76 million cases.

In overall terms, whiskies (including Scotch and all whiskies of the world) account for more brands than vodka in the list, standing this year at 51 brands. Sales volumes for the sector globally increased by 6 per cent in 2007.

The most dynamic growth comes from non-Scotch whisky, driven by Indian whisky, which grew by 12 per cent in its domestic market in 2007. As can be seen in the list, a large number of brands saw dynamic rates of growth, led by Original Choice at 56 per cent and McDowell's

No. 1 and Royal Stag, both of which grew by over 33 per cent.

The dominant type of whisky in volume terms in 2007 was blended Scotch, with 19 brands. blended Scotch was also a key growth driver for overall whisk(e)y, with global growth of 4 per cent in 2007. This is reflected by the dynamic growth of many of the brands in the sector, led by International brands such as Johnnie Walker and Chivas Regal with 11 per cent, closely followed by Ballantine's with 10 per cent growth.

The other sector to perform well in 2007 was rum, which grew by 3 per cent in volume terms globally. Growth was driven predominantly by dark/golden rum products, which accounted for over 70 per cent of growth during the year. This was in part due to dynamic growth in India, with brands such as McDowell's No. 1 Celebration growing by 23.7 per cent in 2007, but also from the growing popularity of dark/golden rum in markets such as the US and western Europe.

This has allowed international brands, which are predominantly dark/golden variants, to see

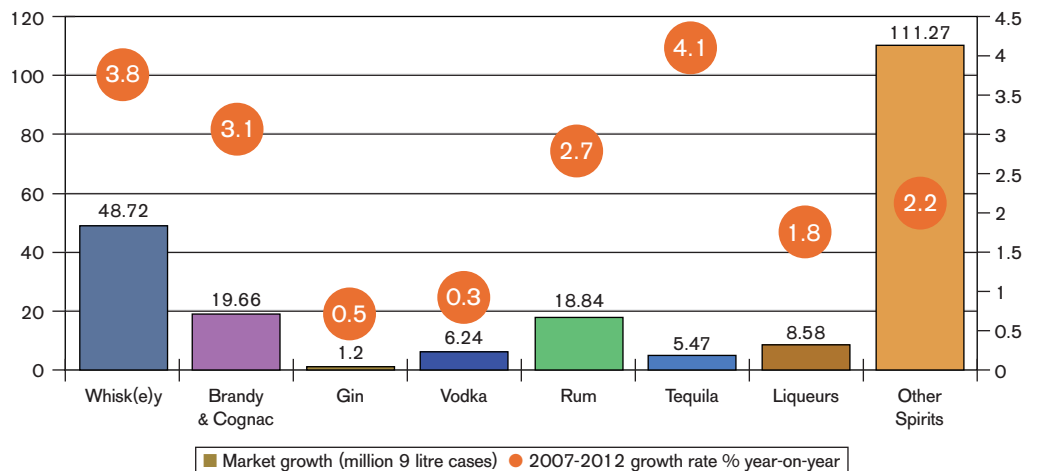
strong growth: Captain Morgan volumes were up 7 per cent and Havana Club up 15 per cent. In contrast, predominantly white rum brands have suffered, notably Bacardi, which saw its volumes decline for the second year in a row in 2007.

As for the future, the spirits market is expected to continue to grow strongly between 2007 and 2012, with a CAGR (constant annual growth rate) of 2.1 per cent. Growth is going to be driven by "other spirits", in particular local Chinese spirits such as baijiu, so we should be seeing more of these brands appearing in the list.

Whisk(e)y will also be a key growth driver, predominantly through Indian whisky, but also blended Scotch, which is likely to mean further strong growth for these two sectors.

Rum, brandy and Cognac will also continue to perform well in the foreseeable future. In most regions, rum will continue to be driven by dark/golden variants. Brandy will continue to be driven by growth in Asia-Pacific and eastern Europe, while Asia-Pacific will also continue to drive Cognac. □

Forecast volume growth



# Diageo seven heaven

Diageo is the leading company by a healthy margin in terms of number of brands in the International top 30, with seven entries including two of the top five. Smirnoff remains comfortably the biggest-selling international brand in 2007. Along with Diageo stablemate Johnnie Walker (volumes up 1.3 and 1.5 million cases respectively), it saw the largest actual increase of any of the top 30 brands.

Pernod Ricard has the second biggest presence in the International top 30 list with four brands, led by Ballantine's in 13th position.

Among the Domestic/Local brands, volumes are still dominated by the Korean and Thai behemoths Jinro and Ruang Khao, despite both seeing a decline in volumes.

Jinro's decline was due mainly to the maturity of the South Korean soju market, while Ruang Khao's steeper decline was due to weak economic

conditions in Thailand and a series of natural disasters in the early part of the year.

United Spirits is the company with most brands in the table with five brands in the top 30. This year sees the entry of two new brands, C1 soju and Tuopai baijiu.

There has been some movement among the Regional brands, with the newly-added vodka brand from Russia, Myagkov in at number three, while Parliament vodka and Label 5 Scotch both moved up one place compared to 2006 to second and fifth respectively.

Indeed, with most Regional brands struggling to find new sales, any brand enjoying even moderate growth can improve its position.

Any lack of growth is due mainly to the limited resources the company puts behind the brand or else to the limited distribution that many of these brands have. □



## Top 30 International brands

Brand	Owner	Category	2003	2004	2005	2006	2007	% +/-
Smirnoff	Diageo	Vodka	18.70	20.10	21.30	23.00	24.30	5.7
Pirassununga 51	Companhia Müller de Bebidas	Cachaça	21.46	23.59	22.34	22.61	21.50	-4.9
Bacardi	Bacardi	Rum	18.50	19.50	20.10	20.00	19.90	-0.5
Johnnie Walker	Diageo	Whisky - Scotch	11.40	12.00	12.80	14.30	15.80	10.5
Absolut	V&S Group	Vodka	8.10	8.50	9.20	9.80	10.73	9.5
Jack Daniel's	Brown-Forman	Whiskey - American-Tennessee	7.05	7.64	8.38	8.94	9.33	4.4
Pitú	Engarramento Pitú	Cachaça	7.05	7.62	7.78	8.53	9.31	9.2
Nemiroff	Nemiroff Ukrainian Vodka Company	Vodka	5.12	7.28	9.32	7.80	8.89	14.0
Captain Morgan	Diageo	Rum	5.60	6.30	6.90	7.30	7.80	6.8
Baileys	Diageo	Liqueurs	6.60	6.80	6.70	7.10	7.70	8.5
Jose Cuervo	Cuervo International	Tequila	5.39	5.52	6.07	6.57	6.69	1.9
Jägermeister	Mast-Jägermeister	Bitters	3.78	4.50	5.20	5.95	6.32	6.2
Ballantine's	Pernod Ricard	Whisky - Scotch	5.70	5.68	5.63	5.62	6.17	9.8
Jim Beam	Beam Global Spirits & Wine	Whiskey - American-Bourbon	5.10	5.20	5.67	5.94	6.14	3.5
J&B Rare	Diageo	Whisky - Scotch	6.00	6.00	5.90	5.90	5.90	0.0
Ricard	Pernod Ricard	Anis	6.21	6.03	5.72	5.66	5.78	2.1
Crown Royal	Diageo	Whisky - Canadian	4.00	4.20	4.50	4.70	5.00	6.4
De Kuyper	Koninklijke De Kuyper	Liqueurs	4.77	4.86	4.78	4.90	4.90	0.0
William Grant's	William Grant & Sons	Whisky - Scotch	3.80	4.12	4.10	4.39	4.79	9.1
Hennessy	LVMH	Cognac	3.58	3.73	3.80	4.20	4.74	12.9
Gordon's	Diageo	Gin	5.20	5.30	5.00	5.00	4.50	-10.0
Chivas Regal	Pernod Ricard	Whisky - Scotch	2.94	3.29	3.81	3.95	4.37	10.6
Malibu	Pernod Ricard	Liqueurs	2.80	2.96	3.23	3.33	3.63	9.0
Grey Goose	Bacardi	Vodka	1.40	1.80	2.30	3.00	3.60	20.0
Dewar's	Bacardi	Whisky - Scotch	3.40	3.50	3.50	3.40	3.50	2.9
Stolichnaya	Sojuzplodimport (SPI Spirits)	Vodka	na	na	na	3.10	3.33	7.4
Sauza	Beam Global Spirits & Wine	Tequila	2.60	3.00	2.88	3.12	3.21	2.9
Campari	Gruppo Campari	Bitters	2.90	2.90	2.90	2.90	2.93	1.0
The Famous Grouse Finest	Highland Distillers/Edrington	Whisky - Scotch	2.50	2.70	2.76	2.90	2.90	0.0
Skyy	Gruppo Campari	Vodka	2.00	2.10	2.30	2.70	2.90	7.4

## The 22 Regional brands

Brand	Owner	Category	2003	2004	2005	2006	2007	% +/-
Seagram's	Pernod Ricard	Gin	3.30	3.31	3.30	3.44	3.00	-12.8
Parliament	CEDC	Vodka	0.58	1.12	1.48	2.03	2.70	33.0
Myagkov	Synergy	Vodka	na	na	2.47	2.44	2.51	2.9
Seagram's 7 Crown	Diageo	Whiskey - American-Other	2.50	2.50	2.50	2.50	2.50	0.0
Label 5	La Martiniquaise	Whisky - Scotch	1.56	1.56	1.62	1.74	1.91	9.8
Popov	Diageo	Vodka	1.80	1.90	1.80	1.80	1.80	0.0
Cacique	Diageo	Rum	1.50	1.70	1.80	1.80	1.70	-5.6
Bols	CEDC	Vodka	2.32	2.08	1.58	1.40	1.67	19.3
Clan Campbell	Pernod Ricard	Whisky - Scotch	1.53	1.59	1.58	1.56	1.64	5.1
Seagram's VO	Diageo	Whisky - Canadian	1.50	1.40	1.40	1.30	1.60	23.1
Kakubin	Suntory	Whisky - Japanese	1.98	1.83	1.72	1.60	1.58	-1.3
Pastis 51	Pernod Ricard	Anis	1.88	1.76	1.66	1.53	1.49	-2.6
Clan MacGregor	William Grant & Sons	Whisky - Scotch	1.45	1.60	1.50	1.30	1.35	3.8
Buchanan's	Diageo	Whisky - Scotch	0.80	0.90	1.00	1.30	1.30	0.0
Castillo	Bacardi	Rum	1.50	1.60	1.50	1.40	1.30	-7.1
Gordon's	Diageo	Vodka	1.50	1.50	1.50	1.40	1.30	-7.1
Soplica	CEDC	Vodka	na	0.81	0.73	1.06	1.29	21.7
Koskenkorva	Altia Corporation	Vodka	1.27	1.38	1.25	1.21	1.22	0.4
Amaro Ramazzotti	Pernod Ricard	Bitters	1.18	1.25	1.26	1.27	1.18	-7.1
Aperol	Gruppo Campari	Bitters	0.60	0.70	0.85	1.00	1.15	15.0
Black Nikka	Asahi Breweries	Whisky - Japanese	1.38	1.40	1.50	1.47	1.11	-24.5
Fernet Stock	Oaktree Capital Management	Bitters	1.60	1.20	1.20	1.00	1.10	10.0

## Top 30 Domestic/Local brands

Brand	Owner	Category	2003	2004	2005	2006	2007	% +/-
Jinro	Jinro Limited	Soju	62.50	71.29	71.36	71.41	69.80	-2.3
Ruang Khao	Thai Beverage	Thai White Spirit	36.60	38.18	37.71	37.04	31.56	-14.8
Tanduay	Tanduay Distillers	Rum	13.14	14.65	13.27	12.40	14.43	16.4
Bagpiper	United Spirits	Whisky - Indian	6.50	7.34	10.54	13.02	13.95	7.1
McDowell's No.1	United Spirits	Whisky - Indian	5.02	5.68	6.07	8.65	11.46	32.5
C1	Daesun Distilling	Soju	10.50	10.30	10.50	10.30	10.40	1.0
Khortytza	Khortytza Distillery	Vodka	0.18	1.84	3.87	8.10	9.40	16.0
Zelenaya Marka (Green Mark)	Russian Alcohol Group	Vodka	na	1.30	5.00	7.30	8.10	11.0
McDowell's No.1	United Spirits	Brandy - Indian	3.42	4.58	5.29	5.99	7.64	27.5
McDowell's No.1 Celebration	United Spirits	Rum	4.15	4.86	5.42	6.17	7.63	23.7
Emperador	Emperador Distillers	Brandy	na	na	na	7.20	7.30	1.4
Ypioca	Grupo Ypioca	Cachaça	6.50	6.70	6.90	7.10	7.13	0.4
Officer's Choice	BDA Limited	Whisky - Indian	3.87	3.30	3.94	5.01	6.60	31.7
Original Choice	John Distilleries	Whisky - Indian	na	2.28	3.16	4.12	6.41	55.6
Pyat Ozer	Omskvinprom	Vodka	0.06	0.41	1.08	2.38	6.04	153.8
Royal Stag	Pernod Ricard	Whisky - Indian	2.53	2.94	3.43	4.24	5.63	32.8
Tuopai	Sichuan Tuopai Yest Liquor	Baijiu	4.47	5.05	4.82	5.30	5.22	-1.6
Daigoro	Asahi Breweries	Shochu	5.58	5.14	5.19	5.24	4.66	-11.1
Hong Thong	Thai Beverage	Thai Rum	na	na	na	1.64	4.60	180.5
Absolwent	CEDC	Vodka	3.35	3.80	3.94	4.04	4.12	2.0
8PM	Radico Khaitan	Whisky - Indian	2.21	3.05	4.15	4.16	3.76	-9.6
Dreher	Gruppo Campari	Brandy - Brazilian	2.80	2.90	3.10	3.50	3.75	7.1
Director's Special	United Spirits	Whisky - Indian	3.17	3.89	4.32	3.77	3.69	-2.1
Kanoka	Asahi Breweries	Shochu	na	1.90	2.50	3.02	3.44	13.9
Dai Jyuhyo	Suntory	Shochu	na	na	3.83	3.83	3.40	-11.2
Imperial Blue	Pernod Ricard	Whisky - Indian	1.62	1.72	2.00	2.51	3.13	24.7
Sangsom	Thai Beverage	Thai Rum	5.59	7.71	8.68	4.60	2.98	-35.2
Old Tavern	United Spirits	Whisky - Indian	1.10	1.29	1.87	2.55	2.84	11.4
Starogardzka	Belvédère	Vodka	2.60	3.73	3.19	2.60	2.84	9.2
Montilla	Pernod Ricard	Rum	1.96	2.29	2.32	2.72	2.67	-1.8

Figures expressed in millions of 9-litre cases equivalent

# Spirited performance

The continued popularity of vodka globally is perfectly illustrated in the fastest growing tables. Vodka dominates the leading positions of the fastest growing International brands, taking seven out of the top 10 places. Vodka is also prevalent in the Regional list, where it has three of the top four positions.

The most dynamic International brand was Wyborowa, whose 52 per cent growth was due to the near doubling of its volume sales in its home market, Poland. Strong Polish sales also assisted growth for Brown-Forman's Finlandia. The most dynamic non-vodka brand in the Internationals was the new entry, Distell's Amarula cream-based liqueur, with most of its growth coming from its domestic market in South Africa.

Domestic/Local brands have seen by far the most dynamic growth with the leading two positions taken up by Shiva Distilleries' two brands Monitor 3D Gold Rum and Cardinal Brandy. The former has grown by an

unprecedented near 1,200 per cent following a successful relaunch, while Cardinal Brandy seems to have taken sales from the company's own Monitor brand. Indeed, Indian spirits brands continue to make a strong showing in Domestic/Local section accounting for 15 out of the top 30 fastest movers, thanks to the continued rapid growth of the Indian spirits market, especially Indian whisk(e)y which accounted for two-thirds of the 15 Indian brands in the list. In addition two other brands saw volumes more than double during 2007, Hong Thong and Pyat Ozer.

CEDC dominates the top of the fastest growing Regional table with its three vodka brands, the most dynamic being the recently acquired Parliament vodka which saw growth of 33 per cent. The Regional brands have generally seen much slower rates of growth, probably due to a combination of limited distribution and a lower marketing priority afforded them by some owners. □



## Top 30 Fastest growing Internationals

Brand	Owner	Category	2003	2004	2005	2006	2007	% +/-
Wyborowa	Pernod Ricard	Vodka	0.98	1.00	0.93	1.17	1.78	<b>52.1</b>
Russian Standard	Roust	Vodka	0.61	0.99	1.03	1.35	1.90	<b>40.7</b>
Grey Goose	Bacardi	Vodka	1.40	1.80	2.30	3.00	3.60	<b>20.0</b>
Finlandia	Brown-Forman	Vodka	1.62	1.84	2.10	2.30	2.75	<b>19.6</b>
Amarula	Distell Group	Liqueurs	0.73	0.69	0.79	0.93	1.08	<b>16.9</b>
Sobieski	Belvédère	Vodka	1.52	1.38	1.67	2.15	2.50	<b>16.3</b>
Bell's	Diageo	Whisky - Scotch	2.00	2.00	2.20	2.00	2.30	<b>15.0</b>
Nemiroff	Nemiroff Ukrainian Vodka Company	Vodka	5.12	7.28	9.32	7.80	8.89	<b>14.0</b>
Jameson	Pernod Ricard	Whiskey - Irish	1.58	1.73	1.95	2.18	2.48	<b>13.8</b>
Eristoff	Bacardi	Vodka	1.10	1.20	1.40	1.50	1.70	<b>13.3</b>
Hennessy	LVMH	Cognac	3.58	3.73	3.80	4.20	4.74	<b>12.9</b>
Chivas Regal	Pernod Ricard	Whisky - Scotch	2.94	3.29	3.81	3.95	4.37	<b>10.6</b>
Johnnie Walker	Diageo	Whisky - Scotch	11.40	12.00	12.80	14.30	15.80	<b>10.5</b>
Martell	Pernod Ricard	Cognac	1.09	1.16	1.26	1.46	1.61	<b>10.3</b>
Tanqueray	Diageo	Gin	2.00	2.00	1.90	2.00	2.20	<b>10.0</b>
Ballantine's	Pernod Ricard	Whisky - Scotch	5.70	5.68	5.63	5.62	6.17	<b>9.8</b>
Absolut	V&S Group	Vodka	8.10	8.50	9.20	9.80	10.73	<b>9.5</b>
Pitú	Engarramento Pitú	Cachaça	7.05	7.62	7.78	8.53	9.31	<b>9.2</b>
William Grant's	William Grant & Sons	Whisky - Scotch	3.80	4.12	4.10	4.39	4.79	<b>9.1</b>
Malibu	Pernod Ricard	Liqueurs	2.80	2.96	3.23	3.33	3.63	<b>9.0</b>
Havana Club	Pernod Ricard	Rum	1.86	2.00	2.32	2.61	2.84	<b>8.8</b>
Baileys	Diageo	Liqueurs	6.60	6.80	6.70	7.10	7.70	<b>8.5</b>
Fernet Branca	Fratelli Branca Distillerie	Bitters	2.27	2.34	2.55	2.90	3.12	<b>7.6</b>
Teacher's Highland Cream	Beam Global Spirits & Wine	Whisky - Scotch	1.80	1.75	1.75	1.84	1.98	<b>7.4</b>
Stolichnaya	Sojuzplodimport (SPI Spirits)	Vodka	na	na	na	3.10	3.33	<b>7.4</b>
Skyy	Gruppo Campari	Vodka	2.00	2.10	2.30	2.70	2.90	<b>7.4</b>
Captain Morgan	Diageo	Rum	5.60	6.30	6.90	7.30	7.80	<b>6.8</b>
Crown Royal	Diageo	Whisky - Canadian	4.00	4.20	4.50	4.70	5.00	<b>6.4</b>
Jägermeister	Mast-Jägermeister	Bitters	3.78	4.50	5.20	5.95	6.32	<b>6.2</b>
Rémy Martin	Rémy Cointreau	Cognac	1.70	1.70	1.70	1.70	1.80	<b>5.9</b>

# by vodka players

## Fastest growing Regionals

Brand	Owner	Category	2003	2004	2005	2006	2007	% +/-
Parliament	CEDC	Vodka	0.58	1.12	1.48	2.03	2.70	<b>33.0</b>
Seagram's VO	Diageo	Whisky - Canadian	1.50	1.40	1.40	1.30	1.60	<b>23.1</b>
Soplica	CEDC	Vodka	na	0.81	0.73	1.06	1.29	<b>21.7</b>
Bols	CEDC	Vodka	2.32	2.08	1.58	1.40	1.67	<b>19.3</b>
Aperol	Gruppo Campari	Bitters	0.60	0.70	0.85	1.00	1.15	<b>15.0</b>
Fernet Stock	Oaktree Capital Management	Bitters	1.60	1.20	1.20	1.00	1.10	<b>10.0</b>
Label 5	La Martiniquaise	Whisky - Scotch	1.56	1.56	1.62	1.74	1.91	<b>9.8</b>
Clan Campbell	Pernod Ricard	Whisky - Scotch	1.53	1.59	1.58	1.56	1.64	<b>5.1</b>
Clan MacGregor	William Grant & Sons	Whisky - Scotch	1.45	1.60	1.50	1.30	1.35	<b>3.8</b>
Myagkov	Synergy	Vodka	na	na	2.47	2.44	2.51	<b>2.9</b>
Koskenkorva	Altia Corporation	Vodka	1.27	1.38	1.25	1.21	1.22	<b>0.4</b>
Seagram's 7 Crown	Diageo	Whisky - American-Other	2.50	2.50	2.50	2.50	2.50	<b>0.0</b>
Popov	Diageo	Vodka	1.80	1.90	1.80	1.80	1.80	<b>0.0</b>
Buchanan's	Diageo	Whisky - Scotch	0.80	0.90	1.00	1.30	1.30	<b>0.0</b>
Kakubin	Suntory	Whisky - Japanese	1.98	1.83	1.72	1.60	1.58	<b>-1.3</b>
Pastis 51	Pernod Ricard	Anis	1.88	1.76	1.66	1.53	1.49	<b>-2.6</b>
Cacique	Diageo	Rum	1.50	1.70	1.80	1.80	1.70	<b>-5.6</b>
Amaro Ramazzotti	Pernod Ricard	Bitters	1.18	1.25	1.26	1.27	1.18	<b>-7.1</b>
Castillo	Bacardi	Rum	1.50	1.60	1.50	1.40	1.30	<b>-7.1</b>
Gordon's	Diageo	Vodka	1.50	1.50	1.50	1.40	1.30	<b>-7.1</b>
Seagram's	Pernod Ricard	Gin	3.30	3.31	3.30	3.44	3.00	<b>-12.8</b>
Black Nikka	Asahi Breweries	Whisky - Japanese	1.38	1.40	1.50	1.47	1.11	<b>-24.5</b>

## Top 30 fastest growing Domestic/Locals

Brand	Owner	Category	2003	2004	2005	2006	2007	% +/-
Monitor 3D Gold Rum	Shiva Distilleries	Rum - Indian	na	na	na	0.10	1.30	<b>1,200</b>
Cardinal Brandy	Shiva Distilleries	Brandy - Indian	na	na	0.15	0.70	2.05	<b>192.9</b>
Hong Thong	Thai Beverage	Thai Rum	na	na	na	1.64	4.60	<b>180.5</b>
Pyat Ozer	Omskvinprom	Vodka	0.06	0.41	1.08	2.38	6.04	<b>153.8</b>
Gosudarev Zakaz	Synergy	Vodka	na	na	0.10	0.65	1.23	<b>88.7</b>
Original Choice	John Distilleries	Whisky - Indian	na	2.28	3.16	4.12	6.41	<b>55.6</b>
Director's Special Black	United Spirits	Whisky - Indian	na	na	na	0.90	1.34	<b>48.9</b>
Svedka	Constellation Brands	Vodka	0.31	0.45	0.64	1.02	1.51	<b>48.0</b>
Monitor Whisky	Shiva Distilleries	Whisky - Indian	1.02	0.61	0.68	0.93	1.36	<b>46.2</b>
Polonaise	Belvédère	Vodka	na	na	na	0.75	1.05	<b>40.0</b>
Patrón Tequila	Patrón Spirits	Tequila	0.22	0.36	0.65	1.15	1.60	<b>39.1</b>
Original Lithuanian Vodka	AB Stumbras	Vodka	0.53	0.54	0.70	1.02	1.41	<b>37.8</b>
John Exshaw	United Spirits	Brandy - Indian	1.07	0.98	1.18	1.12	1.49	<b>33.0</b>
Royal Stag	Pernod Ricard	Whisky - Indian	2.53	2.94	3.43	4.24	5.63	<b>32.8</b>
McDowell's No.1	United Spirits	Whisky - Indian	5.02	5.68	6.07	8.65	11.46	<b>32.5</b>
Officer's Choice	BDA Limited	Whisky - Indian	3.87	3.30	3.94	5.01	6.60	<b>31.7</b>
Blenders Pride	Pernod Ricard	Whisky - Indian	na	na	0.92	1.17	1.51	<b>29.1</b>
Wilthener Goldkrone	Hardenberg-Wilthen	Brandy - German	1.63	1.52	1.43	1.22	1.56	<b>27.9</b>
Luksusowa	V&S Group	Vodka	1.11	1.20	1.15	1.15	1.47	<b>27.6</b>
McDowell's No.1	United Spirits	Brandy - Indian	3.42	4.58	5.29	5.99	7.64	<b>27.5</b>
Honey Bee	United Spirits	Brandy - Indian	1.13	1.26	1.30	1.73	2.20	<b>27.2</b>
Imperial Blue	Pernod Ricard	Whisky - Indian	1.62	1.72	2.00	2.51	3.13	<b>24.7</b>
McDowell's No.1 Celebration	United Spirits	Rum	4.15	4.86	5.42	6.17	7.63	<b>23.7</b>
Tanduay	Tanduay Distillers	Rum	13.14	14.65	13.27	12.40	14.43	<b>16.4</b>
Khortytza	Khortytza Distillery	Vodka	0.18	1.84	3.87	8.10	9.4	<b>16.0</b>
Kanoka	Asahi Breweries	Shochu	na	1.90	2.50	3.02	3.44	<b>13.9</b>
Royal Challenge	United Spirits	Whisky - Indian	0.90	0.94	0.98	1.03	1.17	<b>13.6</b>
White Mischief	United Spirits	Vodka	na	na	na	1.12	1.26	<b>12.5</b>
Old Tavern	United Spirits	Whisky - Indian	1.10	1.29	1.87	2.55	2.84	<b>11.4</b>
Zelenaya Marka (Green Mark)	Russian Alcohol Group	Vodka	na	1.30	5.00	7.30	8.10	<b>11.0</b>

Figures expressed in millions of 9-litre cases equivalent

# Steady as she goes



The world's biggest spirits producer, Diageo, showed good growth across its portfolio, with the exception of static figures for blended Scotch brands J&B and Buchanan's and a drop for Vat 69. However the company's flagship Scotch, Johnnie Walker, again achieved double-digit growth. In total, Diageo's 16 Millionaire brands accounted for 86.7 million cases – a respectable 5 per cent growth from such a high base.

Nearest rival on the international scene, Pernod Ricard, saw a change at the top of its table as its investment in and relaunch of the Ballantine's range began to bear fruit. The company's three Indian whisky brands also reflected the general strength of that sector, all of them growing in excess of 20 per cent. There were mixed results for



the company's signature Anis brands, but overall the 20 Pernod Ricard Millionaire brands kept pace with Diageo, growing by 5.7 per cent to 57.08 million cases.

The world's biggest rum brand, Bacardi may be stuck in the doldrums, but the company's super-premium vodka, Grey Goose, progresses at a healthy pace.

Not shown here but significant by its sheer volume is the United Spirits portfolio of brands sold in India. Together they total 62.84 million cases, about two-thirds of which is Bagpiper whisky and the McDowells range. While there is no prospect of these brands being sold outside the domestic market, owner Vijay Mallya and his United Brands empire are certainly creating a noise globally, spurred on by their involvement with Whyte & Mackay. □

## Millionaires Club 2008: Diageo

Brand	Category	2003	2004	2005	2006	2007	% +/-	Status
Smirnoff	Vodka	18.70	20.10	21.30	23.00	24.30	5.7	International
Johnnie Walker	Whisky – Scotch	11.40	12.00	12.80	14.30	15.80	10.5	International
Captain Morgan	Rum	5.60	6.30	6.90	7.30	7.80	6.8	International
Baileys	Liqueurs	6.60	6.80	6.70	7.10	7.70	8.5	International
J&B Rare	Whisky – Scotch	6.00	6.00	5.90	5.90	5.90	0.0	International
Crown Royal	Whisky – Canadian	4.00	4.20	4.50	4.70	5.00	6.4	International
Gordon's	Gin	5.20	5.30	5.00	5.00	4.50	-10.0	International
Seagram's 7 Crown	Whiskey – American/Other	2.50	2.50	2.50	2.50	2.50	0.0	Regional
Bell's	Whisky – Scotch	2.00	2.00	2.20	2.00	2.30	15.0	International
Tanqueray	Gin	2.00	2.00	1.90	2.00	2.20	10.0	International
Popov	Vodka	1.80	1.90	1.80	1.80	1.80	0.0	Regional
Cacique	Rum	1.50	1.70	1.80	1.80	1.70	-5.6	Regional
Seagram's VO	Whisky – Canadian	1.50	1.40	1.40	1.30	1.60	23.1	Regional
Buchanan's	Whisky – Scotch	0.80	0.90	1.00	1.30	1.30	0.0	Regional
Gordon's	Vodka	1.50	1.50	1.50	1.40	1.30	-7.1	Regional
VAT 69	Whisky – Scotch	1.10	1.10	1.10	1.10	1.00	-9.1	International

## Millionaires Club 2008: Gruppo Campari

Brand	Category	2003	2004	2005	2006	2007	% +/-	Status
Dreher	Brandy – Brazilian	2.80	2.90	3.10	3.50	3.75	7.1	Domestic/Local
Campari	Bitters	2.90	2.90	2.90	2.90	2.93	1.0	International
Skyv	Vodka	2.00	2.10	2.30	2.70	2.90	7.4	International
Aperol	Bitters	0.60	0.70	0.85	1.00	1.15	15.0	Regional

## Millionaires Club 2008: Pernod Ricard

Brand	Category	2003	2004	2005	2006	2007	% +/-	Status
Ballantine's	Whisky – Scotch	5.70	5.68	5.63	5.62	6.17	9.8	International
Ricard	Anis	6.21	6.03	5.72	5.66	5.78	2.1	International
Royal Stag	Whisky – Indian	2.53	2.94	3.43	4.24	5.63	32.8	Domestic/Local
Chivas Regal	Whisky – Scotch	2.94	3.29	3.81	3.95	4.37	10.6	International
Malibu	Liqueurs	2.80	2.96	3.23	3.33	3.63	9.0	International
Imperial Blue	Whisky – Indian	1.62	1.72	2.00	2.51	3.13	24.7	Domestic/Local
Seagram's	Gin	3.30	3.31	3.30	3.44	3.00	-12.8	Regional
Havana Club	Rum	1.86	2.00	2.32	2.61	2.84	8.8	International
Montilla	Rum	1.96	2.29	2.32	2.72	2.67	-1.8	Domestic/Local
100 Pipers	Whisky – Scotch	2.39	3.16	3.34	2.94	2.50	-15.0	International
Jameson	Whiskey – Irish	1.58	1.73	1.95	2.18	2.48	13.8	International
Beefeater	Gin	2.40	2.37	2.31	2.32	2.42	4.3	International
Kahlúa	Liqueurs	2.20	2.20	2.13	2.17	2.14	-1.4	International
Wyborowa	Vodka	0.98	1.00	0.93	1.17	1.78	52.1	International
Clan Campbell	Whisky – Scotch	1.53	1.59	1.58	1.56	1.64	5.1	Regional
Martell	Cognac	1.09	1.16	1.26	1.46	1.61	10.3	International
Blenders Pride	Whisky – Indian	na	na	0.92	1.17	1.51	29.1	Domestic/Local
Pastis 51	Anis	1.88	1.76	1.66	1.53	1.49	-2.6	Regional
Amaro Ramazzotti	Bitters	1.18	1.25	1.26	1.27	1.18	-7.1	Regional
Presidente	Brandy – Mexican	na	2.03	0.84	1.16	1.11	-4.3	Domestic/Local

## Millionaires Club 2008: Bacardi

Brand	Category	2003	2004	2005	2006	2007	% +/-	Status
Bacardi	Rum	18.50	19.50	20.10	20.00	19.90	-0.5	International
Grey Goose	Vodka	1.40	1.80	2.30	3.00	3.60	20.0	International
Dewar's	Whisky – Scotch	3.40	3.50	3.50	3.40	3.50	2.9	International
Bombay	Gin	1.60	1.80	1.80	2.10	2.00	-4.8	International
Eristoff	Vodka	1.10	1.20	1.40	1.50	1.70	13.3	International
William Lawson's	Whisky – Scotch	1.00	1.10	1.20	1.30	1.30	0.0	International
Castillo	Rum	1.50	1.60	1.50	1.40	1.30	-7.1	Regional

## Millionaires Club 2008: Beam Global Spirits & Wine

Brand	Category	2003	2004	2005	2006	2007	% +/-	Status
Jim Beam	Whiskey – American/Bourbon	5.10	5.20	5.67	5.94	6.14	3.5	International
Sauza	Tequila	2.60	3.00	2.88	3.12	3.21	2.9	International
Canadian Club	Whisky – Canadian	2.60	2.60	2.13	2.11	2.08	-1.1	International
Teacher's Highland Cream	Whisky – Scotch	1.80	1.75	1.75	1.84	1.98	7.4	International
Larios	Gin	1.79	1.67	1.45	1.45	1.45	0.0	Domestic/Local
DYC	Whisky – Spanish	1.70	1.70	1.34	1.42	1.43	0.8	Domestic/Local
Courvoisier	Cognac	1.20	1.20	1.12	1.14	1.17	2.4	International

## Millionaires Club 2008: Brown-Forman

Brand	Category	2003	2004	2005	2006	2007	% +/-	Status
Jack Daniel's	Whiskey – American-Tennessee	7.05	7.64	8.38	8.94	9.33	4.4	International
Finlandia	Vodka	1.62	1.84	2.10	2.30	2.75	19.6	International
Southern Comfort	Liqueurs	2.17	2.26	2.34	2.45	2.48	1.2	International
Canadian Mist	Whisky – Canadian	2.21	2.14	2.07	1.98	1.91	-3.5	Domestic/Local

## Millionaires Club 2008: Rémy Cointreau

Brand	Category	2003	2004	2005	2006	2007	% +/-	Status
Rémy Martin	Cognac	1.70	1.70	1.70	1.70	1.80	5.9	International
Cointreau	Liqueurs	1.30	1.20	1.30	1.30	1.30	0.0	International
Metaxa	Brandy – Greek	na	na	na	1.10	1.10	0.0	International

# JW still leads the pack

Last year went well for the leading five Scotch whisky brands with all, except J&B Rare, seeing growth in excess of 9 per cent. Johnnie Walker was still comfortably the leading brand, with good growth in the US, eastern Europe and Latin America contributing to strong growth of over 10 per cent, despite a poor result in Asia-Pacific.

J&B's static performance has meant that, for the first time, it has lost its number two spot to Pernod Ricard's Ballantine's brand. J&B's poor performance is due to the continued decline of its major market, Spain, while Diageo's global repositioning of the brand as "the world's party whisky" is yet to turn things around.

Ballantine's substantial sales in Spain have complemented its good presence in other regions such as Asia-Pacific. This, combined with Pernod Ricard's investment in the brand, has allowed it to grow by nearly 10 per cent in 2007.

Chivas Regal performed well, thanks to good growth in most regions, except the US, while William Grant's continued strong performance shows that efforts to grow the brand outside its core markets seem to be paying off.

The fastest-growing Scotch was Diageo's Bell's, primarily due to the brand recovering sales in its major market, the UK, after a bad year in 2006. Further improvements are likely following the launch of Bell's Original blend in May. The most rapid decline was felt by Pernod Ricard's 100 Pipers, primarily due to continued poor sales in its major market, Thailand. ▣



## Millionaires Club 2008: Scotch whiskies

Brand	Owner	2003	2004	2005	2006	2007	% +/-	Status
Johnnie Walker	Diageo	11.40	12.00	12.80	14.30	15.80	10.5	International
Ballantine's	Pernod Ricard	5.70	5.68	5.63	5.62	6.17	9.8	International
J&B Rare	Diageo	6.00	6.00	5.90	5.90	5.90	0.0	International
William Grant's	William Grant & Sons	3.80	4.12	4.10	4.39	4.79	9.1	International
Chivas Regal	Pernod Ricard	2.94	3.29	3.81	3.95	4.37	10.6	International
Dewar's	Bacardi	3.40	3.50	3.50	3.40	3.50	2.9	International
The Famous Grouse Finest	Highland Distillers/Edrington	2.50	2.70	2.76	2.90	2.90	0.0	International
100 Pipers	Pernod Ricard	2.39	3.16	3.34	2.94	2.50	-15.0	International
Bell's	Diageo	2.00	2.00	2.20	2.00	2.30	15.0	International
Teacher's Highland Cream	Beam Global Spirits & Wine	1.80	1.75	1.75	1.84	1.98	7.4	International
Label 5	La Martiniquaise	1.56	1.56	1.62	1.74	1.91	9.8	Regional
William Peel	Belvédère	1.51	1.53	1.60	1.76	1.78	1.1	Domestic/Local
Cutty Sark	Berry Bros & Rudd/Edrington	1.89	1.85	1.80	1.75	1.70	-2.9	International
Clan Campbell	Pernod Ricard	1.53	1.59	1.58	1.56	1.64	5.1	Regional
Clan MacGregor	William Grant & Sons	1.45	1.60	1.50	1.30	1.35	3.8	Regional
William Lawson's	Bacardi	1.00	1.10	1.20	1.30	1.30	0.0	International
Buchanan's	Diageo	0.80	0.90	1.00	1.30	1.30	0.0	Regional
Sir Edward's	Bardinet	0.78	0.98	1.04	1.26	1.27	1.0	International
VAT 69	Diageo	1.10	1.10	1.10	1.10	1.00	-9.1	International

Figures expressed in millions of 9-litre cases equivalent

# India surges ahead

Indian whisky has increased its grip on the sector as it now has four of the top-five brands. There are only three non-Indian whiskies in the top 10 and Brown-Forman's Jack Daniel's is the best performer. This trend is primarily due to the rapid growth of the Indian whisky market, up over 11 per cent in 2007. Many of the brands have seen growth rates exceeding that, notably McDowell's No.1 rising 32.5 per cent pushing it up the rankings into second place. John Distilleries' Original Choice saw the most dramatic growth, up over 55 per cent which means a leap of four places to fifth.

After Indian whisky, Canadian whisky is the next most popular type in the list with five entries. Yet all bar the two Diageo brands (Crown Royal, Seagram's VO) saw volumes decline, due to the sluggish growth of the US, the category's major market. This meant the loss of Beam

Global's Windsor brand from the list.

The various US whiskies – Jack Daniel's, Jim Beam, Seagram's 7 Crown – all saw sluggish growth, in part due to the maturation of their domestic market. As well as continuing growth in export markets, Jack Daniel's and Jim Beam capitalised on what growth there was in the US as consumers traded up to more premium brands.

Japanese whisky continued to fall due to the ongoing decline in its domestic scene, something that could not be countered by exports thanks to its limited appeal abroad. The sole Irish whiskey brand Jameson continued to see double-digit growth due to continued strong performances in the US and South Africa, following the relaunch of the range last October. □



## Millionaires Club 2008: Whiskies of the world

Brand	Owner	Category	2003	2004	2005	2006	2007	% +/-	Status
Bagpiper	United Spirits	Whisky - Indian	6.50	7.34	10.54	13.02	13.95	7.1	Domestic/Local
McDowell's No. 1	United Spirits	Whisky - Indian	5.02	5.68	6.07	8.65	11.46	32.5	Domestic/Local
Jack Daniel's	Brown-Forman	Whiskey - American-Tennessee	7.05	7.64	8.38	8.94	9.33	4.4	International
Officer's Choice	BDA	Whisky - Indian	3.87	3.30	3.94	5.01	6.60	31.7	Domestic/Local
Original Choice	John Distilleries	Whisky - Indian	na	2.28	3.16	4.12	6.41	55.6	Domestic/Local
Jim Beam	Beam Global Spirits & Wine	Whiskey - American-Bourbon	5.10	5.20	5.67	5.94	6.14	3.5	International
Royal Stag	Pernod Ricard	Whisky - Indian	2.53	2.94	3.43	4.24	5.63	32.8	Domestic/Local
Crown Royal	Diageo	Whisky - Canadian	4.00	4.20	4.50	4.70	5.00	6.4	International
8PM	Radico Khaitan	Whisky - Indian	2.21	3.05	4.15	4.16	3.76	-9.6	Domestic/Local
Director's Special	United Spirits	Whisky - Indian	3.17	3.89	4.32	3.77	3.69	-2.1	Domestic/Local
Imperial Blue	Pernod Ricard	Whisky - Indian	1.62	1.72	2.00	2.51	3.13	24.7	Domestic/Local
Old Tavern	United Spirits	Whisky - Indian	1.10	1.29	1.87	2.55	2.84	11.4	Domestic/Local
Seagram's 7 Crown	Diageo	Whiskey - American-Other	2.50	2.50	2.50	2.50	2.50	0.0	Regional
Jameson	Pernod Ricard	Whiskey - Irish	1.58	1.73	1.95	2.18	2.48	13.8	International
Hayward's	United Spirits	Whisky - Indian	2.08	2.26	2.96	2.17	2.31	6.5	Domestic/Local
Aristocrat Premium	Jagatjit Industries	Whisky - Indian	na	na	na	na	2.20	-	Domestic/Local
Bonnie Special	Jagatjit Industries	Whisky - Indian	1.62	1.81	1.41	1.90	2.10	10.5	Domestic/Local
Canadian Club	Beam Global Spirits & Wine	Whisky - Canadian	2.60	2.60	2.13	2.11	2.08	-1.1	International
Canadian Mist	Brown-Forman	Whisky - Canadian	2.21	2.14	2.07	1.98	1.91	-3.5	Domestic/Local
Black Velvet	Constellation Brands	Whisky - Canadian	2.04	2.10	2.07	2.10	1.90	-9.5	International
Gilbey's Green Label	United Spirits	Whisky - Indian	2.29	2.40	2.27	1.85	1.83	-1.1	Domestic/Local
Gold Riband	United Spirits	Whisky - Indian	na	0.96	1.73	1.72	1.63	-5.2	Domestic/Local
Seagram's VO	Diageo	Whisky - Canadian	1.50	1.40	1.40	1.30	1.60	23.1	Regional
Kakubin	Suntory	Whisky - Japanese	1.98	1.83	1.72	1.60	1.58	-1.3	Regional
Blenders Pride	Pernod Ricard	Whisky - Indian	na	na	0.92	1.17	1.51	29.1	Domestic/Local
DYC	Beam Global Spirits & Wine	Whisky - Spanish	1.70	1.70	1.34	1.42	1.43	0.8	Domestic/Local
Monitor Whisky	Shiva Distilleries	Whisky - Indian	1.02	0.61	0.68	0.93	1.36	46.2	Domestic/Local
Director's Special Black	United Spirits	Whisky - Indian	na	na	na	0.90	1.34	48.9	Domestic/Local
Aristocrat	Jagatjit Industries	Whisky - Indian	1.44	1.29	1.13	1.18	1.30	10.2	Domestic/Local
Royal Challenge	United Spirits	Whisky - Indian	0.90	0.94	0.98	1.03	1.17	13.6	Domestic/Local
Black Nikka	Asahi Breweries	Whisky - Japanese	1.38	1.40	1.50	1.47	1.11	-24.5	Regional
AC Sabki Ek Choice	Jagatjit Industries	Whisky - Indian	na	na	na	na	1.10	-	Domestic/Local

Figures expressed in millions of 9-litre cases equivalent

# Bubbling under

Diageo's Gordon's Gin brand remains the largest brand in the list, with the owner of the world's leading gin brand, Ginebra San Miguel (sales around the 25 million case mark), again not wishing to participate.

Gordon's saw a sharp decline during 2007, possibly due to an overhang from the end of 2006 when it saw a sharp decline in retail sales in its largest market, the UK, so part of 2007's sales would have included surplus stock from 2006.

Gordon's Gin was not alone in declining, with Pernod's Seagram's Gin and Bacardi's Bombay brands both suffering declines. Sales of both these brands are reliant on the US, and with the

market only growing by around 1 per cent overall in 2007, their volumes could have been squeezed – especially given Diageo's launch of its Tanqueray Rangpur extension in the US, which helped the premium brand grow by 10 per cent.

The only other brand to see some growth was Pernod Ricard's Beefeater brand, primarily due to the company's continued investment in the brand following its relaunch, and a major marketing campaign in 2007.

There is much talk among the mixologist fraternity of a resurgence of premium gin in the cocktail sector. Certainly, the results of the Drinks International Gin Challenge (see June issue)

revealed a high level of quality among the top brands. The judges' comments on the day added further weight to the claims of increased interest in premium gins.

An emerging tendency to produce more highly flavoured gins, distilled with an increasingly exotic array of botanicals, is providing bartenders with plenty of scope for experimentation both in mixed drinks and Martinis.

It remains to be seen in 2008 whether this translates into a more generally buoyant gin sector – especially given the tough economic conditions in the US, the hotbed of Martini action. ☐



## Millionaires Club 2008: Gin

Brand	Owner	2003	2004	2005	2006	2007	% +/-	Status
Gordon's	Diageo	5.20	5.30	5.00	5.00	4.50	-10.0	International
Seagram's	Pernod Ricard	3.30	3.31	3.30	3.44	3.00	-12.8	Regional
Beefeater	Pernod Ricard	2.40	2.37	2.31	2.32	2.42	4.3	International
Tanqueray	Diageo	2.00	2.00	1.90	2.00	2.20	10.0	International
Bombay	Bacardi	1.60	1.80	1.80	2.10	2.00	-4.8	International
Larios	Beam Global Spirits & Wine	1.79	1.67	1.45	1.45	1.45	0.0	Domestic/Local

Figures expressed in millions of 9-litre cases equivalent

# Big hitters show no sign of slacking pace

With 37 brands in the list, vodka remains by far the biggest category in the Millionaires Club. The seemingly unstoppable rise of this sector is witnessed not only in the growth rates of most brands but also the increasing geographic spread, with the entry for the first time of a domestic Indian brand, United Spirits' White Mischief, which had volume sales of 1.26 million cases in 2007.

As for the leading brands, the top five are unchanged from last year in terms of ranking. Diageo's Smirnoff, the world's leading vodka, was up 5.7 per cent, primarily due to good growth in its key markets of the US and the UK. Second placed Absolut saw strong growth, but driven largely outside its main US market, and particularly strong in Europe with Spain, Germany, Poland and the UK doing well. The next three brands in the rankings sell the vast majority of their volumes in Russia and Ukraine.

Beneath the leading five there has been a greater degree of movement, with Omskvinprom's Pyat Ozer leaping up the rankings from 13th to sixth, thanks to growth of 153.8 per cent



## Millionaires Club 2008: Top 20 vodkas

Brand	Owner	2003	2004	2005	2006	2007	% +/-	Status
Smirnoff	Diageo	18.70	20.10	21.30	23.00	24.30	5.7	International
Absolut	V&S Group	8.10	8.50	9.20	9.80	10.73	9.5	International
Khortytza	Khortytza Distillery	0.18	1.84	3.87	8.10	9.40	16.0	Domestic/Local
Nemiroff	Nemiroff Ukrainian Vodka Company	5.12	7.28	9.32	7.80	8.89	14.0	International
Zelenaya Marka (Green Mark)	Russian Alcohol Group	na	1.30	5.00	7.30	8.10	11.0	Domestic/Local
Pyat Ozer	Omskvinprom	0.06	0.41	1.08	2.38	6.04	153.8	Domestic/Local
Absolwent	CEDC	3.35	3.80	3.94	4.04	4.12	2.0	Domestic/Local
Grey Goose	Bacardi	1.40	1.80	2.30	3.00	3.60	20.0	International
Stolichnaya	Sojuzplodimport (SPI Spirits)	na	na	na	3.10	3.33	7.4	International
Skyy	Gruppo Campari	2.00	2.10	2.30	2.70	2.90	7.4	International
Starogardzka	Belvédère	2.60	3.73	3.19	2.60	2.84	9.2	Domestic/Local
Finlandia	Brown-Forman	1.62	1.84	2.10	2.30	2.75	19.6	International
Parliament	CEDC	0.58	1.12	1.48	2.03	2.70	33.0	Regional
Myagkov	Synergy	na	na	2.47	2.44	2.51	2.9	International
Sobieski	Belvédère	1.52	1.38	1.67	2.15	2.50	16.3	Regional
Belenkaya	Synergy	na	na	2.96	1.89	2.04	8.1	Domestic/Local
Russian Standard	Roust	0.61	0.99	1.03	1.35	1.90	40.7	International
Ketel One	Nolet Spirits	1.30	1.50	1.68	1.87	1.88	0.4	Domestic/Local
Popov	Diageo	1.80	1.90	1.80	1.80	1.80	0.0	Regional
Wyborowa	Pernod Ricard	0.98	1.00	0.93	1.17	1.78	52.1	International

Figures expressed in millions of 9-litre cases equivalent

# Vodka

during 2007, while there are also new entries at 15 and 16 in the form of Russian producer Synergy's Myagkov and Belenkaya brands.

## Fastest growing

Repeating its performance in 2006, Pyat Ozer was the fastest growing vodka brand this year, followed by another Russian brand Gosudarev Zakaz, a third new entrant from Synergy.

Yet vodka brands in Russia can be in vogue one week and out the next, hence Russian brands, or brands which sell large volumes in Russia, need to diversify into other markets quickly to survive long-term. This fashion factor could explain why Soyuz-Victan's brand volumes do not appear in the Millionaires research this year as the company said it was undergoing a "major re-organisation" and unable to provide figures. Thus it is more likely that Russian Standard, which has been launched and marketed internationally, has a better chance of sustaining its growth.

Brands based in Poland are also prominent in the fastest growing list, with third-placed Wyborowa's growth coming from its Polish domestic market. Other brands focusing on the same market include Polonaise, Luksusowa, Soplica, Bols and Sobieski, although the latter's growth was predominantly driven by international sales.

## International

The popularity of vodka around the world is illustrated by the fact that all International brands saw good growth, with the lowest figure being Smirnoff at 5.7 per cent, although in volume terms that still translates as an increase of more than 1 million cases. Third ranked Nemiroff ▶



## Millionaires Club 2008: Fastest growing vodkas, Top 20

Brand	Owner	2003	2004	2005	2006	2007	% +/-	Status
Pyat Ozer	Omskvinprom	0.06	0.41	1.08	2.38	6.04	<b>153.8</b>	Domestic/Local
Gosudarev Zakaz	Synergy	na	na	0.10	0.65	1.23	<b>88.7</b>	Domestic/Local
Wyborowa	Pernod Ricard	0.98	1.00	0.93	1.17	1.78	<b>52.1</b>	International
Svedka	Constellation Brands	0.31	0.45	0.64	1.02	1.51	<b>48.0</b>	Domestic/Local
Russian Standard	Roust	0.61	0.99	1.03	1.35	1.90	<b>40.7</b>	International
Polonaise	Belvédère	na	na	na	0.75	1.05	<b>40.0</b>	Domestic/Local
Original Lithuanian Vodka	AB Stumbras	0.53	0.54	0.70	1.02	1.41	<b>37.8</b>	Domestic/Local
Parliament	CEDC	0.58	1.12	1.48	2.03	2.70	<b>33.0</b>	Regional
Luksusowa	V&S Group	1.11	1.20	1.15	1.15	1.47	<b>27.6</b>	Domestic/Local
Soplica	CEDC	na	0.81	0.73	1.06	1.29	<b>21.7</b>	Regional
Grey Goose	Bacardi	1.40	1.80	2.30	3.00	3.60	<b>20.0</b>	International
Finlandia	Brown-Forman	1.62	1.84	2.10	2.30	2.75	<b>19.6</b>	International
Bols	CEDC	2.32	2.08	1.58	1.40	1.67	<b>19.3</b>	Regional
Sobieski	Belvédère	1.52	1.38	1.67	2.15	2.50	<b>16.3</b>	International
Khortytza	Khortytza Distillery	0.18	1.84	3.87	8.10	9.40	<b>16.0</b>	Domestic/Local
Nemiroff	Nemiroff Ukrainian Vodka Company	5.12	7.28	9.32	7.80	8.89	<b>14.0</b>	International
Eristoff	Bacardi	1.10	1.20	1.40	1.50	1.70	<b>13.3</b>	International
White Mischief	United Spirits	na	na	na	1.12	1.26	<b>12.5</b>	Domestic/Local
Zelenaya Marka (Green Mark)	Russian Alcohol Group	na	1.30	5.00	7.30	8.10	<b>11.0</b>	Domestic/Local
Absolut	V&S Group	8.10	8.50	9.20	9.80	10.73	<b>9.5</b>	International

Figures expressed in millions of 9-litre cases equivalent

saw good growth, but its volume increase still puts it below its 2005 peak. Bacardi's Grey Goose performed well, with growth of 20 per cent as the company continued to push the brand more into international markets.

### Regional and Domestic/Local

The leading regional brand volumes are led by the CEDC (Central European Distribution Corporation) Parliament and Bols brands, both of which saw strong growth during 2007. While Parliament only came under CEDC's control in the latter part of 2007, Bols benefited from the company's growing distribution network in eastern Europe. Synergy's Myagkov in second place is a new entry into the Millionaires list. The Ukrainian brand was acquired by the Russian group in 2007-8. Diageo's Regional vodkas are North American brands, which are given a lower priority by the company, as is reflected in their limited growth in 2007.

Unsurprisingly, it is eastern European and Russian brands that monopolise the leading five positions in the Domestic/Local brands. The Ukrainian focused Khortytza brand takes top position, and the remaining four places are taken by two Russian and two Polish brands. □



### Millionaires Club 2008: Top 10 International vodkas

Brand	Owner	2003	2004	2005	2006	2007	% +/-
Smirnoff	Diageo	18.70	20.10	21.30	23.00	24.30	5.7
Absolut	V&S Group	8.10	8.50	9.20	9.80	10.73	9.5
Nemiroff	Nemiroff Ukrainian Vodka Company	5.12	7.28	9.32	7.80	8.89	14.0
Grey Goose	Bacardi	1.40	1.80	2.30	3.00	3.60	20.0
Stolichnaya	Sojuzplodimport (SPI Spirits)	na	na	na	3.10	3.33	7.4
Skyy	Gruppo Campari	2.00	2.10	2.30	2.70	2.90	7.4
Finlandia	Brown-Forman	1.62	1.84	2.10	2.30	2.75	19.6
Sobieski	Belvédère	1.52	1.38	1.67	2.15	2.50	16.3
Russian Standard	Roust	0.61	0.99	1.03	1.35	1.90	40.7
Wyborowa	Pernod Ricard	0.98	1.00	0.93	1.17	1.78	52.1

### Millionaires Club 2008: Top 5 Regional vodkas

Brand	Owner	2003	2004	2005	2006	2007	% +/-
Parliament	CEDC	0.58	1.12	1.48	2.03	2.70	33.0
Myagkov	Synergy	na	na	2.47	2.44	2.51	2.9
Popov	Diageo	1.80	1.90	1.80	1.80	1.80	0.0
Bols	CEDC	2.32	2.08	1.58	1.40	1.67	19.3
Gordon's	Diageo	1.50	1.50	1.50	1.40	1.30	-7.1

### Millionaires Club 2008: Top 5 Domestic/Local vodkas

Brand	Owner	2003	2004	2005	2006	2007	% +/-
Khortytza	Khortytza Distillery	0.18	1.84	3.87	8.10	9.40	16.0
Zelenaya Marka (Green Mark)	Russian Alcohol Group	na	1.30	5.00	7.30	8.10	11.0
Pyat Ozer	Omskvinprom	0.06	0.41	1.08	2.38	6.04	153.8
Absolwent	CEDC	3.35	3.80	3.94	4.04	4.12	2.0
Starogardzka	Belvédère	2.60	3.73	3.19	2.60	2.84	9.2

Figures expressed in millions of 9-litre cases equivalent

# Bacardi breezes it

Bacardi's eponymous brand slipped slightly for the second year in a row, with volumes down 0.5 per cent, but remains unchallenged at the top of the rum table. The fact that Bacardi is predominantly a white rum brand is no doubt a central factor in this gradual decline, given that golden and aged rums are outperforming white in both the US and Europe, Bacardi's two largest markets.

The same factor also hit Bacardi's secondary, US-facing Castillo brand, which saw volumes fall 7.1 per cent during the year.

In contrast, Diageo's leading dark rum brand, Captain Morgan, saw strong growth in both of those regions, to help increase its overall global volumes by 6.8 per cent.

Diageo's other rum brand, Caciue, did not perform so well, due to a decline in sales in its main market, Spain.

Second-placed Tanduay rum saw strong growth in 2007 (up 16.4 per cent), due in part to the improved

conditions in its main market, the Philippines. In 2006, according to the company, the brand suffered the knock-on effect of poor economic conditions and typhoons hitting the country.

Yet it was United Spirits' McDowell's No. 1 Celebration that saw the strongest growth, with volumes up 23.7 per cent. This more than countered the decline of its other two Indian rum brands, Old Cask and Old Adventurer.

Pernod Ricard's Havana Club brand continued its consistent improvement in 2007, with sales driven by Latin American markets. Appleton Jamaica Rum continued to benefit from growth in the US as well as domestically, and it will be interesting to see what the effects will be in 2008 of its recent purchase by CL World Brands.

In cachaça, Pirassununga 51 continues to dominate, despite a slight decline in 2007, while the Pitú brand continues to see strong growth with volumes up 9.2 per cent – a good performance with its native market in long-term decline and exports still minimal. □



## Millionaires Club 2008: Rum

Brand	Owner	2003	2004	2005	2006	2007	% +/-	Status
Bacardi	Bacardi	18.50	19.50	20.10	20.00	19.90	-0.5	International
Tanduay	Tanduay Distillers	13.14	14.65	13.27	12.40	14.43	16.4	Domestic/Local
Captain Morgan	Diageo	5.60	6.30	6.90	7.30	7.80	6.8	International
McDowell's No. 1 Celebration	United Spirits	4.15	4.86	5.42	6.17	7.63	23.7	Domestic/Local
Havana Club	Pernod Ricard	1.86	2.00	2.32	2.61	2.84	8.8	International
Montilla	Pernod Ricard	1.96	2.29	2.32	2.72	2.67	-1.8	Domestic/Local
Contessa	Radico Khaitan	2.12	2.33	2.50	2.08	2.19	5.3	Domestic/Local
Caciue	Diageo	1.50	1.70	1.80	1.80	1.70	-5.6	Regional
Monitor 3D Gold Rum	Shiva Distilleries	na	na	na	0.10	1.30	12.0	Domestic/Local
Castillo	Bacardi	1.50	1.60	1.50	1.40	1.30	-7.1	Regional
Old Cask	United Spirits	1.40	1.74	1.78	1.45	1.28	-11.7	Domestic/Local
Appleton Jamaica Rum	CL World Brands	1.02	1.08	1.11	1.13	1.14	1.4	International
Old Adventurer	United Spirits	1.08	1.14	1.03	1.22	1.12	-8.2	Domestic/Local

Figures expressed in millions of 9-litre cases equivalent

## Millionaires Club 2008: Cachaça

Brand	Owner	2003	2004	2005	2006	2007	% +/-	Status
Pirassununga 51	Companhia Müller de Bebidas	21.46	23.59	22.34	22.61	21.50	-4.9	International
Pitú	Engarrafamento Pitú	7.05	7.62	7.78	8.53	9.31	9.2	International
Ypioca	Grupo Ypioca	6.50	6.70	6.90	7.10	7.13	0.4	Domestic/Local

Figures expressed in millions of 9-litre cases equivalent

# Regional appeal key to brandy success



## Cognac

All the Cognac brands in the 2008 Millionaires list performed well, reflecting the boom in the premium segment across Asia and the US. The leading brand, Hennessy, was the strongest (up 12.9 per cent), thanks to very strong growth in the US and continued good growth in Asia-Pacific, notably in China and Vietnam.

Strength in the Asia-Pacific region also helped boost Pernod Ricard's third-ranked Martell brand by 10.3 per cent in 2007.

Weaker distribution in the major Cognac growth markets, especially Asia-Pacific, contributed to slower improvements for Rémy Cointreau's premium mainstay Rémy Martin and Beam Global's Courvoisier. Following two good years for the Cognac Millionaires, the question is whether they will be able to ride out the coming economic slowdown in Cognac's largest market, the US, while maintaining these rates of growth.

## Brandy

The Brandy category saw some very strong growth rates, especially in India. United Spirits used its full distribution strength in this market to capitalise on market growth of 6 per cent, with all three of its brands in healthy double-digit growth, including the world's leading brandy McDowell's No. 1 at 27.5 per cent, while Shiva Distilleries' Cardinal brand leapt by 192.9 per cent. This appears to have been at the expense of other brands such as Radico Khaitan's Old Admiral, which saw static sales, and Shiva's Monitor, which declined by nearly 40 per cent.

More surprisingly, the two German brandy brands, Wiltener Goldkrone and Chantré, both saw double-digit growth in a declining market.

Other brands performed less well, and more in line with their market growth rates. One exception was Campari's Dreher brand, which saw growth of 7.1 per cent in a falling market. □

## Millionaires Club 2008: Cognac

Brand	Owner	2003	2004	2005	2006	2007	% +/-	Status
Hennessy	LVMH	3.58	3.73	3.80	4.20	4.74	12.9	International
Rémy Martin	Rémy Cointreau	1.70	1.70	1.70	1.70	1.80	5.9	International
Martell	Pernod Ricard	1.09	1.16	1.26	1.46	1.61	10.3	International
Courvoisier	Beam Global Spirits & Wine	1.20	1.20	1.12	1.14	1.17	2.4	International

Figures expressed in millions of 9-litre cases equivalent

## Millionaires Club 2008: Brandy

Brand	Owner	2003	2004	2005	2006	2007	% +/-	Status
McDowell's No. 1	United Spirits	3.42	4.58	5.29	5.99	7.64	27.5	Domestic/Local
Emperador	Emperador Distillers	na	na	na	7.20	7.30	1.4	Domestic/Local
Dreher	Gruppo Campari	2.80	2.90	3.10	3.50	3.75	7.1	Domestic/Local
Honey Bee	United Spirits	1.13	1.26	1.30	1.73	2.20	27.2	Domestic/Local
Cardinal Brandy	Shiva Distilleries	na	na	0.15	0.70	2.05	192.9	Domestic/Local
Wiltener Goldkrone	Hardenberg-Wilthen	1.63	1.52	1.43	1.22	1.56	27.9	Domestic/Local
John Exshaw	United Spirits	1.07	0.98	1.18	1.12	1.49	33.0	Domestic/Local
Old Admiral	Radico Khaitan	0.70	1.04	1.40	1.40	1.40	0.0	Domestic/Local
Monitor Brandy	Shiva Distilleries	1.74	2.45	2.20	2.17	1.32	-39.2	Domestic/Local
Paul Masson Grande Amber	Constellation Brands	1.23	1.28	1.33	1.32	1.29	-2.3	Domestic/Local
Presidente	Pernod Ricard	na	2.03	0.84	1.16	1.11	-4.3	Domestic/Local
Metaxa	Rémy Cointreau	na	na	na	1.10	1.10	0.0	International
Chantré	Rotkäppchen-Mumm	1.20	1.20	1.10	0.98	1.08	10.2	Domestic/Local

Figures expressed in millions of 9-litre cases equivalent

## Millionaires Club 2008: Bitters

Brand	Owner	2003	2004	2005	2006	2007	% +/-	Status
Jägermeister	Mast-Jägermeister	3.78	4.50	5.20	5.95	6.32	<b>6.2</b>	International
Fernet Branca	Fratelli Branca Distillerie	2.27	2.34	2.55	2.90	3.12	<b>7.6</b>	International
Campari	Gruppo Campari	2.90	2.90	2.90	2.90	2.93	<b>1.0</b>	International
Amaro Ramazzotti	Pernod Ricard	1.18	1.25	1.26	1.27	1.18	<b>-7.1</b>	Regional
Aperol	Gruppo Campari	0.60	0.70	0.85	1.00	1.15	<b>15.0</b>	Regional
Fernet Stock	Oaktree Capital Management	1.60	1.20	1.20	1.00	1.10	<b>10.0</b>	Regional

## Millionaires Club 2008: Liqueurs

Brand	Owner	2003	2004	2005	2006	2007	% +/-	Status
Baileys	Diageo	6.60	6.80	6.70	7.10	7.70	<b>8.5</b>	International
De Kuyper	De Kuyper/Beam Global Spirits & Wine	4.77	4.86	4.78	4.90	4.90	<b>0.0</b>	International
Malibu	Pernod Ricard	2.80	2.96	3.23	3.33	3.63	<b>9.0</b>	International
Southern Comfort	Brown-Forman	2.17	2.26	2.34	2.45	2.48	<b>1.2</b>	International
Kahlúa	Pernod Ricard	2.20	2.20	2.13	2.17	2.14	<b>-1.4</b>	International
Cointreau	Rémy Cointreau	1.30	1.20	1.30	1.30	1.30	<b>0.0</b>	International
Bols	Lucas Bols	1.18	1.21	1.21	1.21	1.26	<b>4.1</b>	International
Amarula	Distell Group	0.73	0.69	0.79	0.93	1.08	<b>16.9</b>	International

## Millionaires Club 2008: Tequila

Brand	Owner	2003	2004	2005	2006	2007	% +/-	Status
Jose Cuervo	Cuervo International	5.39	5.52	6.07	6.57	6.69	<b>1.9</b>	International
Sauza	Beam Global Spirits & Wine	2.60	3.00	2.88	3.12	3.21	<b>2.9</b>	International
Patrón Tequila	Patrón Spirits	0.22	0.36	0.65	1.15	1.60	<b>39.1</b>	Domestic/Local

## Millionaires Club 2008: Other categories

Brand	Owner	2003	2004	2005	2006	2007	% +/-	Status
<b>Anis</b>								
Ricard	Pernod Ricard	6.21	6.03	5.72	5.66	5.78	<b>2.1</b>	International
Pastis 51	Pernod Ricard	1.88	1.76	1.66	1.53	1.49	<b>-2.6</b>	Regional
<b>Baijiu</b>								
Tuopai	Sichuan Tuopai Yest Liquor	4.47	5.05	4.82	5.30	5.22	<b>-1.6</b>	Domestic/Local
Kinmen Kaoliang	Kinmen Kaoliang Liquor	1.58	1.61	1.49	1.81	1.88	<b>3.9</b>	Domestic/Local
<b>Soju/Shochu</b>								
Jinro Soju	Jinro Limited	62.50	71.29	71.36	71.41	69.80	<b>-2.3</b>	Domestic/Local
C1 Soju	Daesun Distilling	10.50	10.30	10.50	10.30	10.40	<b>1.0</b>	Domestic/Local
Daigoro Shochu	Asahi Breweries	5.58	5.14	5.19	5.24	4.66	<b>-11.1</b>	Domestic/Local
Kanoka Shochu	Asahi Breweries	na	1.90	2.50	3.02	3.44	<b>13.9</b>	Domestic/Local
Dai Jyuhyo Shochu	Suntory	na	na	3.83	3.83	3.40	<b>-11.2</b>	Domestic/Local
<b>Thai Rum/Thai White Spirit</b>								
Ruang Khao	Thai Beverage	36.60	38.18	37.71	37.04	31.56	<b>-14.8</b>	Domestic/Local
Hong Thong	Thai Beverage	na	na	na	1.64	4.60	<b>180.5</b>	Domestic/Local
Sangsom	Thai Beverage	5.59	7.71	8.68	4.60	2.98	<b>-35.2</b>	Domestic/Local
Pai Thong	Thai Beverage	2.96	2.97	2.77	2.69	1.85	<b>-31.2</b>	Domestic/Local

Figures expressed in millions of 9-litre cases equivalent



# Local brands on the rise

Of the 20 new entrants in the Millionaires Club this year, all but two fall into the Domestic/Local category, which in itself makes up nearly half of the Millionaires list in total



## Millionaires Club 2007

Brand	Owner	Category	2003	2004	2005	2006	2007	% +/-	Status	
1	Jinro	Jinro Limited	Soju	62.50	71.29	71.36	71.41	69.80	-2.3	Domestic/Local
2	Ruang Khao	Thai Beverage	Thai White Spirit	36.60	38.18	37.71	37.04	31.56	-14.8	Domestic/Local
3	Smirnoff	Diageo	Vodka	18.70	20.10	21.30	23.00	24.30	5.7	International
4	Pirassununga 51	Companhia Müller de Bebidas	Cachaça	21.46	23.59	22.34	22.61	21.50	-4.9	International
5	Bacardi	Bacardi	Rum	18.50	19.50	20.10	20.00	19.90	-0.5	International
6	Johnnie Walker	Diageo	Whisky - Scotch	11.40	12.00	12.80	14.30	15.80	10.5	International
7	Tanduay	Tanduay Distillers	Rum	13.14	14.65	13.27	12.40	14.43	16.4	Domestic/Local
8	Bagpiper	United Spirits	Whisky - Indian	6.50	7.34	10.54	13.02	13.95	7.1	Domestic/Local
9	McDowell's No. 1	United Spirits	Whisky - Indian	5.02	5.68	6.07	8.65	11.46	32.5	Domestic/Local
10	Absolut	V&S Group	Vodka	8.10	8.50	9.20	9.80	10.73	9.5	International
11	C1	Daesun Distilling	Soju	10.50	10.30	10.50	10.30	10.40	1.0	Domestic/Local
12	Khortytza	Khortytza Distillery	Vodka	0.18	1.84	3.87	8.10	9.40	16.0	Domestic/Local
13	Jack Daniel's	Brown-Forman	Whiskey - American-Tennessee	7.05	7.64	8.38	8.94	9.33	4.4	International
14	Pitú	Engarramento Pitú	Cachaça	7.05	7.62	7.78	8.53	9.31	9.2	International
15	Nemiroff	Nemiroff Ukrainian Vodka Company	Vodka	5.12	7.28	9.32	7.80	8.89	14.0	International
16	Zelenaya Marka (Green Mark)	Russian Alcohol Group	Vodka	na	1.30	5.00	7.30	8.10	11.0	Domestic/Local
17	Captain Morgan	Diageo	Rum	5.60	6.30	6.90	7.30	7.80	6.8	International
18	Baileys	Diageo	Liqueurs	6.60	6.80	6.70	7.10	7.70	8.5	International
19	McDowell's No. 1	United Spirits	Brandy - Indian	3.42	4.58	5.29	5.99	7.64	27.5	Domestic/Local
20	McDowell's No. 1 Celebration	United Spirits	Rum	4.15	4.86	5.42	6.17	7.63	23.7	Domestic/Local
21	Emperador	Emperador Distillers	Brandy	na	na	na	7.20	7.30	1.4	Domestic/Local
22	Ypioca	Grupo Ypioca	Cachaça	6.50	6.70	6.90	7.10	7.13	0.4	Domestic/Local
23	Jose Cuervo	Cuervo International	Tequila	5.39	5.52	6.07	6.57	6.69	1.9	International
24	Officer's Choice	BDA	Whisky - Indian	3.87	3.30	3.94	5.01	6.60	31.7	Domestic/Local
25	Original Choice	John Distilleries	Whisky - Indian	na	2.28	3.16	4.12	6.41	55.6	Domestic/Local
26	Jägermeister	Mast-Jägermeister	Bitters	3.78	4.50	5.20	5.95	6.32	6.2	International
27	Ballantine's	Pernod Ricard	Whisky - Scotch	5.70	5.68	5.63	5.62	6.17	9.8	International
28	Jim Beam	Beam Global Spirits & Wine	Whiskey - American-Bourbon	5.10	5.20	5.67	5.94	6.14	3.5	International
29	Pyat Ozer	Omskvinprom	Vodka	0.06	0.41	1.08	2.38	6.04	153.8	Domestic/Local
30	J&B Rare	Diageo	Whisky - Scotch	6.00	6.00	5.90	5.90	5.90	0.0	International
31	Ricard	Pernod Ricard	Anis	6.21	6.03	5.72	5.66	5.78	2.1	International
32	Royal Stag	Pernod Ricard	Whisky - Indian	2.53	2.94	3.43	4.24	5.63	32.8	Domestic/Local
33	Tuopai	Sichuan Tuopai Yest Liquor	Baijiu	4.47	5.05	4.82	5.30	5.22	-1.6	Domestic/Local
34	Crown Royal	Diageo	Whisky - Canadian	4.00	4.20	4.50	4.70	5.00	6.4	International
35	De Kuyper	De Kuyper/Beam Global Spirits & Wine	Liqueurs	4.77	4.86	4.78	4.90	4.90	0.0	International
36	William Grant's	William Grant & Sons	Whisky - Scotch	3.80	4.12	4.10	4.39	4.79	9.1	International

\* Based on brand share of verified total output

Figures expressed in millions of 9-litre cases equivalent

# Full listing

## Millionaires Club 2007

Brand	Owner	Category	2003	2004	2005	2006	2007	% +/-	Status	
37	Hennessy	LVMH	Cognac	3.58	3.73	3.80	4.20	4.74	12.9	International
38	Daigoro	Asahi Breweries	Shochu	5.58	5.14	5.19	5.24	4.66	-11.1	Domestic/Local
39	Hong Thong	Thai Beverage	Thai Rum	na	na	na	1.64	4.60	180.5	Domestic/Local
40	Gordon's	Diageo	Gin	5.20	5.30	5.00	5.00	4.50	-10.0	International
41	Chivas Regal	Pernod Ricard	Whisky - Scotch	2.94	3.29	3.81	3.95	4.37	10.6	International
42	Absolwent	CEDC	Vodka	3.35	3.80	3.94	4.04	4.12	2.0	Domestic/Local
43	8PM	Radico Khaitan	Whisky - Indian	2.21	3.05	4.15	4.16	3.76	-9.6	Domestic/Local
44	Dreher	Gruppo Campari	Brandy - Brazilian	2.80	2.90	3.10	3.50	3.75	7.1	Domestic/Local
45	Director's Special	United Spirits	Whisky - Indian	3.17	3.89	4.32	3.77	3.69	-2.1	Domestic/Local
46	Malibu	Pernod Ricard	Liqueurs	2.80	2.96	3.23	3.33	3.63	9.0	International
47	Grey Goose	Bacardi	Vodka	1.40	1.80	2.30	3.00	3.60	20.0	International
48	Dewar's	Bacardi	Whisky - Scotch	3.40	3.50	3.50	3.40	3.50	2.9	International
49	Kanoka	Asahi Breweries	Shochu	na	1.90	2.50	3.02	3.44	13.9	Domestic/Local
50	Dai Jyuhyo	Suntory	Shochu	na	na	3.83	3.83	3.40	-11.2	Domestic/Local
51	Stolichnaya	Sojuzplodimport (SPI Spirits)	Vodka	na	na	na	3.10	3.33	7.4	International
52	Sauza	Beam Global Spirits & Wine	Tequila	2.60	3.00	2.88	3.12	3.21	2.9	International
53	Imperial Blue	Pernod Ricard	Whisky - Indian	1.62	1.72	2.00	2.51	3.13	24.7	Domestic/Local
54	Fernet Branca	Fratelli Branca Distillerie	Bitters	2.27	2.34	2.55	2.90	3.12	7.6	International
55	Seagram's	Pernod Ricard	Gin	3.30	3.31	3.30	3.44	3.00	-12.8	Regional
56	Sangsom	Thai Beverage	Thai Rum	5.59	7.71	8.68	4.60	2.98	-35.2	Domestic/Local
57	Campari	Gruppo Campari	Bitters	2.90	2.90	2.90	2.90	2.93	1.0	International
58	Skyv	Gruppo Campari	Vodka	2.00	2.10	2.30	2.70	2.90	7.4	International
59	The Famous Grouse Finest	Highland Distillers/Edrington	Whisky - Scotch	2.50	2.70	2.76	2.90	2.90	0.0	International
60	Old Tavern	United Spirits	Whisky - Indian	1.10	1.29	1.87	2.55	2.84	11.4	Domestic/Local
61	Starogardzka	Belvédère	Vodka	2.60	3.73	3.19	2.60	2.84	9.2	Domestic/Local
62	Havana Club	Pernod Ricard	Rum	1.86	2.00	2.32	2.61	2.84	8.8	International
63	Finlandia	Brown-Forman	Vodka	1.62	1.84	2.10	2.30	2.75	19.6	International
64	Parliament	CEDC	Vodka	0.58	1.12	1.48	2.03	2.70	33.0	Regional
65	Montilla	Pernod Ricard	Rum	1.96	2.29	2.32	2.72	2.67	-1.8	Domestic/Local
66	Sobieski	Belvédère	Vodka	1.52	1.38	1.67	2.15	2.50	16.3	International
67	Myagkov	Synergy	Vodka	na	na	2.47	2.44	2.51	2.9	Regional
68	Seagram's 7 Crown	Diageo	Whiskey - American-Other	2.50	2.50	2.50	2.50	2.50	0.0	Regional
69	100 Pipers	Pernod Ricard	Whiskey - Scotch	2.39	3.16	3.34	2.94	2.50	-15.0	International
70	Jameson	Pernod Ricard	Whiskey - Irish	1.58	1.73	1.95	2.18	2.48	13.8	International
71	Southern Comfort	Brown-Forman	Liqueurs	2.17	2.26	2.34	2.45	2.48	1.2	International
72	Beefeater	Pernod Ricard	Gin	2.40	2.37	2.31	2.32	2.42	4.3	International
73	Hayward's	United Spirits	Whisky - Indian	2.08	2.26	2.96	2.17	2.31	6.5	Domestic/Local
74	Bell's	Diageo	Whisky - Scotch	2.00	2.00	2.20	2.00	2.30	15.0	International
75	Honey Bee	United Spirits	Brandy - Indian	1.13	1.26	1.30	1.73	2.20	27.2	Domestic/Local
76	Tanqueray	Diageo	Gin	2.00	2.00	1.90	2.00	2.20	10.0	International
77	Aristocrat Premium	Jagatjit Industries	Whisky - Indian	na	na	na	na	2.20	-	Domestic/Local
78	Contessa	Radico Khaitan	Rum	2.12	2.33	2.50	2.08	2.19	5.3	Domestic/Local
79	Kahlúa	Pernod Ricard	Liqueurs	2.20	2.20	2.13	2.17	2.14	-1.4	International



# Full listing

## Millionaires Club 2007

Brand	Owner	Category	2003	2004	2005	2006	2007	% +/-	Status	
80	Bonnie Special	Jagatjit Industries	Whisky - Indian	1.62	1.81	1.41	1.90	2.10	10.5	Domestic/Local
81	Canadian Club	Beam Global Spirits & Wine	Whisky - Canadian	2.60	2.60	2.13	2.11	2.08	-1.1	International
82	Cardinal Brandy	Shiva Distilleries	Brandy - Indian	na	na	0.15	0.70	2.05	192.9	Domestic/Local
83	Belenkaya	Synergy	Vodka	na	na	2.96	1.89	2.04	8.1	Domestic/Local
84	Bombay	Bacardi	Gin	1.60	1.80	1.80	2.10	2.00	-4.8	International
85	Teacher's Highland Cream	Beam Global Spirits & Wine	Whisky - Scotch	1.80	1.75	1.75	1.84	1.98	7.4	International
86	Label 5	La Martiniquaise	Whisky - Scotch	1.56	1.56	1.62	1.74	1.91	9.8	Regional
87	Canadian Mist	Brown-Forman	Whisky - Canadian	2.21	2.14	2.07	1.98	1.91	-3.5	Domestic/Local
88	Russian Standard	Roust	Vodka	0.61	0.99	1.03	1.35	1.90	40.7	International
89	Black Velvet	Constellation Brands	Whisky - Canadian	2.04	2.10	2.07	2.10	1.90	-9.5	International
90	Kinmen Kaoliang	Kinmen Kaoliang Liquor	Baijiu	1.58	1.61	1.49	1.81	1.88	3.9	Domestic/Local
91	Ketel One	Nolet Spirits	Vodka	1.30	1.50	1.68	1.87	1.88	0.4	Domestic/Local
92	Pai Thong	Thai Beverage	Thai White Spirit	2.96	2.97	2.77	2.69	1.85	-31.2	Domestic/Local
93	Gilbey's Green Label	United Spirits	Whisky - Indian	2.29	2.40	2.27	1.85	1.83	-1.1	Domestic/Local
94	Rémy Martin	Rémy Cointreau	Cognac	1.70	1.70	1.70	1.70	1.80	5.9	International
95	Popov	Diageo	Vodka	1.80	1.90	1.80	1.80	1.80	0.0	Regional
96	Wyborowa	Pernod Ricard	Vodka	0.98	1.00	0.93	1.17	1.78	52.1	International
97	William Peel	Belvédère	Whisky - Scotch	1.51	1.53	1.60	1.76	1.78	1.1	Domestic/Local
98	Eristoff	Bacardi	Vodka	1.10	1.20	1.40	1.50	1.70	13.3	International
99	Cutty Sark	Berry Bros & Rudd/Edrington	Whisky - Scotch	1.89	1.85	1.80	1.75	1.70	-2.9	International
100	Cacique	Diageo	Rum	1.50	1.70	1.80	1.80	1.70	-5.6	Regional
101	Bols	CEDC	Vodka	2.32	2.08	1.58	1.40	1.67	19.3	Regional
102	Barton	Constellation Brands	Vodka	1.50	1.61	1.55	1.58	1.65	4.4	Domestic/Local
103	Clan Campbell	Pernod Ricard	Whisky - Scotch	1.53	1.59	1.58	1.56	1.64	5.1	Regional
104	Gold Riband	United Spirits	Whisky - Indian	na	0.96	1.73	1.72	1.63	-5.2	Domestic/Local
105	Martell	Pernod Ricard	Cognac	1.09	1.16	1.26	1.46	1.61	10.3	International
106	Patrón Tequila	Patrón Spirits	Tequila	0.22	0.36	0.65	1.15	1.60	39.1	Domestic/Local
107	Seagram's VO	Diageo	Whisky - Canadian	1.50	1.40	1.40	1.30	1.60	23.1	Regional
108	Skol	Constellation Brands	Vodka	1.21	1.37	1.39	1.47	1.59	8.2	Domestic/Local
109	Kakubin	Suntory	Whisky - Japanese	1.98	1.83	1.72	1.60	1.58	-1.3	Regional
110	Wiltener Goldkrone	Hardenberg-Wilthen	Brandy - German	1.63	1.52	1.43	1.22	1.56	27.9	Domestic/Local
111	Svedka	Constellation Brands	Vodka	0.31	0.45	0.64	1.02	1.51	48.0	Domestic/Local
112	Blenders Pride	Pernod Ricard	Whisky - Indian	na	na	0.92	1.17	1.51	29.1	Domestic/Local
113	John Exshaw	United Spirits	Brandy - Indian	1.07	0.98	1.18	1.12	1.49	33.0	Domestic/Local
114	Pastis 51	Pernod Ricard	Anis	1.88	1.76	1.66	1.53	1.49	-2.6	Regional
115	Lukusowa	V&S Group	Vodka	1.11	1.20	1.15	1.15	1.47	27.6	Domestic/Local
116	Larios	Beam Global Spirits & Wine	Gin	1.79	1.67	1.45	1.45	1.45	0.0	Domestic/Local
117	DYC	Beam Global Spirits & Wine	Whisky - Spanish	1.70	1.70	1.34	1.42	1.43	0.8	Domestic/Local
118	Original Lithuanian Vodka	AB Stumbras	Vodka	0.53	0.54	0.70	1.02	1.41	37.8	Domestic/Local
119	Old Admiral	Radico Khaitan	Brandy - Indian	0.70	1.04	1.40	1.40	1.40	0.0	Domestic/Local
120	Monitor Whisky	Shiva Distilleries	Whisky - Indian	1.02	0.61	0.68	0.93	1.36	46.2	Domestic/Local



# Full listing

## Millionaires Club 2007

Brand	Owner	Category	2003	2004	2005	2006	2007	% +/-	Status
121	Clan MacGregor	Whisky - Scotch	1.45	1.60	1.50	1.30	1.35	3.8	Regional
122	Director's Special Black	Whisky - Indian	na	na	na	0.9	1.34	48.9	Domestic/Local
123	Capel	Pisco	1.00	1.20	1.36	1.35	1.32	-2.2	Domestic/Local
124	Monitor Brandy	Brandy - Indian	1.74	2.45	2.20	2.17	1.32	-39.2	Domestic/Local
125	Gorbatschow	Vodka	1.02	1.09	1.13	1.21	1.31	8.3	Domestic/Local
126	Monitor 3D Gold Rum	Rum	na	na	na	0.10	1.30	1200	Domestic/Local
127	Aristocrat	Whisky - Indian	1.44	1.29	1.13	1.18	1.30	10.2	Domestic/Local
128	William Lawson's	Whisky - Scotch	1.00	1.10	1.20	1.30	1.30	0.0	International
129	Cointreau	Liqueurs	1.30	1.20	1.30	1.30	1.30	0.0	International
130	Buchanan's	Whisky - Scotch	0.80	0.90	1.00	1.30	1.30	0.0	Regional
131	Castillo	Rum	1.50	1.60	1.50	1.40	1.30	-7.1	Regional
132	Gordon's	Vodka	1.50	1.50	1.50	1.40	1.30	-7.1	Regional
133	Domus	Conhaque	1.70	1.73	1.53	1.46	1.30	-11.0	Domestic/Local
134	Soplica	Vodka	na	0.81	0.73	1.06	1.29	21.7	Regional
135	Paul Masson Grande Amber	Brandy - American	1.23	1.28	1.33	1.32	1.29	-2.3	Domestic/Local
136	Old Cask	Rum	1.40	1.74	1.78	1.45	1.28	-11.7	Domestic/Local
137	Sir Edward's	Whisky - Scotch	0.78	0.98	1.04	1.26	1.27	1.0	International
138	White Mischief	Vodka	na	na	na	1.12	1.26	12.5	Domestic/Local
139	Bols	Liqueurs	1.18	1.21	1.21	1.21	1.26	4.1	International
140	Gosudarev Zakaz	Vodka	na	na	0.10	0.65	1.23	88.7	Domestic/Local
141	Koskenkorva	Vodka	1.27	1.38	1.25	1.21	1.22	0.4	Regional
142	Amaro Ramazzotti	Bitters	1.18	1.25	1.26	1.27	1.18	-7.1	Regional
143	Royal Challenge	Whisky - Indian	0.90	0.94	0.98	1.03	1.17	13.6	Domestic/Local
144	Courvoisier	Cognac	1.20	1.20	1.12	1.14	1.17	2.4	International
145	Aperol	Bitters	0.60	0.70	0.85	1.00	1.15	15.0	Regional
146	Appleton Jamaica Rum	Rum	1.02	1.08	1.11	1.13	1.14	1.4	International
147	Old Adventurer	Rum	1.08	1.14	1.03	1.22	1.12	-8.2	Domestic/Local
148	Presidente	Brandy - Mexican	na	2.03	0.84	1.16	1.11	-4.3	Domestic/Local
149	Black Nikka	Whisky - Japanese	1.38	1.40	1.50	1.47	1.11	-24.5	Regional
150	Fernet Stock	Bitters	1.60	1.20	1.20	1.00	1.10	10.0	Regional
151	Metaxa	Brandy - Greek	na	na	na	1.10	1.10	0.0	International
152	AC Sabki Ek Choice	Whisky - Indian	na	na	na	na	1.10	-	Domestic/Local
153	Zhitomirskia	Vodka	0.44	0.62	0.82	1.03	1.09	6.2	Domestic/Local
154	Amarula	Liqueurs	0.73	0.69	0.79	0.93	1.08	16.9	International
155	Chantre	Brandy - German	1.20	1.20	1.10	0.98	1.08	10.2	Domestic/Local
156	Polonaise	Vodka	na	na	na	0.75	1.05	40.0	Domestic/Local
157	Krakowska	Vodka	1.39	1.73	1.21	1.00	1.02	2.0	Domestic/Local
158	VAT 69	Whisky - Scotch	1.10	1.10	1.10	1.10	1.00	-9.1	International
159	Zubrowka	Vodka	na	na	na	na	1.00	-	Domestic/Local

Figures expressed in millions of 9-litre cases equivalent

