the drinks business

ISSUE 70 · MAY 2008 · £6.50

POWER BRANDS

THE TOP 100 IS BACK: CHARTING THE WORLD'S LEADING LABELS

Power Brands 2008

Who's packing the strongest punches in the drinks industry today? This definitive list reports on the movers and shakers in the world of wine and spirits, with analysis by *Patrick Schmitt*

WHAT A difference a year makes. Against a background of company consolidation and an economic slowdown in the Western world we have a new and highly modified list, the Power 100. This is the only international survey of wine and spirits brand power, compiled by Intangible Business, an independent brand valuation consultancy (see page 34 for methodology and list of panelists). It is reflective of much more than just volume sales, but a detailed analysis of value, based on subjective and objective measures.

Overriding trends include the increasing power of Scotch in world markets. This category contains brands with immense strength derived from a high price positioning, long histories, an aspirational image, not forgetting management by the world's largest drinks companies.

Another major category development is in sparkling. Champagne brands are still storming up the list, benefiting from the same combination of strengths as those labels from Scotland. Further, brands in both categories should fare well in times of recession, such is their following among celebrities and the super rich.

Power brands: top 50

Rank	Change	Brand	Sub category	Owner	Country	Total score 08	Change	Brand score 08	Change
1	0	SMIRNOFF	Vodka	Diageo	Russia	90.0%	2%	69%	-9%
2	1	JOHNNIE WALKER	Blended Scotch	Diageo	Scotland	87.6%	20%	81%	0%
3	-1	BACARDI	Rum / cane	Bacardi-Martini	Cuba	80.3%	-2%	78%	3%
4	0	MARTINI	Light apéritif	Bacardi-Martini	Italy	51.5%	-5%	63%	-3%
5	1	HENNESSY	Cognac	LVMH	France	44.9%	7%	77%	-3%
6	1	ABSOLUT	Vodka	Vin & Sprit*	Sweden	41.5%	5%	72%	-1%
7	1	JACK DANIEL'S	US whiskey	Brown-Forman	USA	36.6%	0%	75%	-2%
8	1	CHIVAS REGAL	Blended Scotch	Pernod Ricard	Scotland	32.7%	2%	69%	0%
9	1	BAILEYS	Liqueurs	Diageo	Ireland	29.5%	2%	71%	-4%
10	1	BALLANTINE'S	Blended Scotch	Pernod Ricard	Scotland	29.4%	5%	67%	7%
11	2	CUERVO	Tequila	Diageo	Mexico	27.8%	6%	71%	1%
12	0	CAPTAIN MORGAN	Rum / cane	Diageo	Dominican Republic	26.8%	4%	64%	0%
13	7	JIM BEAM	US whiskey	Beam Global	USA	20.4%	5%	62%	5%
14	1	MOET ET CHANDON	Champagne	LVMH	France	20.2%	2%	78%	1%
15	-1	DEWARS	Blended Scotch	Bacardi-Martini	Scotland	19.2%	0%	51%	0%
16	0	J & B	Blended Scotch	Diageo	Scotland	17.9%	0%	57%	-1%
17	2	JAGERMEISTER	Bitters / spirit apéritifs	Mast-Jägermeister	Germany	17.4%	1%	60%	1%
18	-1	GALLO	Still light wine	E&J Gallo	USA	17.0%	0%	54%	0%
19	2	HARDYS	Still light wine	Constellation Brands	USA	16.2%	2%	56%	3%
20	2	CROWN ROYAL	Canadian whisky	Diageo	Canada	14.6%	0%	54%	-3%
21	3	CONCHA Y TORO	Still light wine	Concha y Toro	Spain	14.6%	1%	58%	2%
22	-4	GORDON'S	Gin / genever	Diageo	England	14.4%	-3%	59%	-4%
23	5	GREY GOOSE	Vodka	Bacardi-Martini	France	14.2%	4%	59%	-5%
24	7	DE KUYPER	Liqueurs	De Kuyper	Holland	13.6%	4%	52%	0%
25	-2	RICARD	Aniseed	Pernod Ricard	France	13.6%	-1%	44%	-2%
26	-1	VEUVE CLICQUOT	Champagne	LVMH	France	12.6%	0%	65%	-10%
27	0	GRANT'S	Blended Scotch	William Grant & Sons	Scotland	12.5%	2%	52%	1%
28	2	JAMESON	Blended Irish whiskey	Pernod Ricard	Ireland	11.4%	2%	67%	-1%
29	-3	MALIBU	Liqueurs	Pernod Ricard	USA	11.0%	0%	56%	-9%
30	2	MARTELL	Cognac	Pernod Ricard	France	11.0%	2%	63%	1%
31	-2	HAVANA CLUB	Rum / cane	Pernod Ricard	Cuba	10.2%	1%	63%	-2%
32	-27	STOLICHNAYA	Vodka	SPI	Russia	10.2%	-43%	57%	-10%
33	2	REMY MARTIN	Cognac	Rémy Cointreau	France	9.5%	0%	65%	-1%
34	-1	SAUZA	Tequila	Beam Global	Mexico	9.2%	0%	53%	-5%
35	new entry	PATRON	Tequila	Pátron Group	Mexico	8.7%	7%	51%	0%
36	0	ROBERT MONDAVI	Still light wine	Constellation Brands	USA	8.6%	0%	56%	2%
37	1	FAMOUS GROUSE	Blended Scotch	Edrington Group	Scotland	8.2%	0%	53%	-2%
38	5	YELLOW TAIL	Still light wine	Casella Wines	Australia	8.2%	1%	48%	-1%
39	27	FERNET-BRANCA	Bitters / spirit apéritifs	Fratelli Branca	Italy	8.0%	4%	47%	4%
40	-1	TANQUERAY	Gin / genever	Diageo	England	7.9%	0%	56%	-2%
41	1	SEAGRAM	Gin / genever	Pernod Ricard	USA	7.8%	1%	42%	2%
42	3	DREHER	Other brandy	Campari	Brazil	7.6%	1%	38%	5%
43	8	FINLANDIA	Vodka	Brown-Forman	Finland	7.6%	2%	52%	-2%
44	new entry**	BERINGER	Still light wine	Foster's Group	USA	7.6%	2%	52%	-2%
45	-4	BEEFEATER	Gin / genever	Pernod Ricard	England	7.1%	0%	54%	-1%
46	0	SKYY	Vodka	Campari	USA	7.1%	1%	45%	-5%
47	0	JACOB'S CREEK	Still light wine	Pernod Ricard	Australia	7.0%	1%	56%	0%
48	-8	SOUTHERN COMFORT	Liqueurs	Brown-Forman	USA	6.8%	-1%	51%	-8%
49	-5	FREIXENET	Other sparkling	Freixinet	Spain	6.7%	0%	54%	2%
50	2	BOMBAY	Gin / genever	Bacardi-Martini	England	6.1%	0%	56%	-5%

***Absolut's parent company is listed as Vin & Sprit because the Pernod Ricard acquisition is yet to be completed and profits currently being made by Absolut go to V&S**
****Californian wine Beringer has burst onto the chart this year but was omitted from last year's survey because of a lack of reliable sales data**

Over the next few pages we will look in detail at each category, each scoring criteria, movers up the list, and movers down, as well as new entrants. But let's firstly look at the top 10.

Top ten

White spirit giant and Russian icon **Smirnoff** tops the power brand chart for the third year running. With a history stretching back to 1860, a 25 million-case production, a 130-country distribution and an ever expanding range of variants, it certainly justifies its status as most powerful brand. However, while it rightly retains leadership, **Johnnie Walker**, now in second place, is rapidly catching up, and the panelists predict it may well take the top spot next year. Why? "Johnnie Walker is one of the world's most valuable brands and it is going like a train," says Stuart Whitwell, joint managing director, Intangible Business. Further, Smirnoff's US-centric position raises doubts over its ability to stay at number one because North America, while a vital, vast and valuable market, is hardly enjoying favourable economic conditions presently – a situation that looks unlikely to change in the short term. Johnnie Walker on the other hand is dominant in the US as well as Greece, Australia and Spain, not forgetting travel retail. It also has enormous growth potential in the Far East, while overall it sells almost 16m cases of blended Scotch.

Bacardi, in third place, having been overtaken by Johnnie Walker, is holding its own in volume terms with around 20m cases, but, being

NO. 1: SMIRNOFF

Taking top spot for the third year running is Smirnoff. Diageo's vodka powerhouse scores highly for market share: it shifts 25 million cases; for market scope: it sells in 130 countries; heritage: founder Piotr Smirnov began distilling the spirit in 1860; awareness: Smirnoff was 007's vodka of choice in Casino Royale; and relevancy: the bar-friendly brand has a range of variants including upmarket Penka and ready-mixed Ice.

Power brands: 51 to 100

Rank	Change	Brand	Sub category	Owner	Country	Total score 08	Change	Brand score 08	Change
51	2	KETEL ONE	Vodka	Nolet Spirits*	Holland	6.0%	0%	48%	-5%
52	4	SUTTER HOME	Still light wine	Trinchero Family Estates	USA	6.0%	0%	45%	4%
53	-4	CANADIAN CLUB	Canadian whisky	Beam Global	Canada	5.9%	0%	53%	2%
54	15	GLENFIDDICH	Malt Scotch	William Grant & Sons	Scotland	5.8%	2%	66%	1%
55	0	BELLS	Blended Scotch	Diageo	Scotland	5.8%	0%	47%	0%
56	-8	KAHLUA	Liqueurs	Pernod Ricard	Mexico	5.7%	-1%	49%	-3%
57	3	CAMPARI	Bitters / spirit apéritifs	Campari	Italy	5.5%	1%	58%	4%
58	6	TEACHERS	Blended Scotch	Beam Global	Scotland	5.4%	1%	51%	6%
59	-22	100 PIPERS	Blended Scotch	Pernod Ricard	Scotland	5.1%	-3%	38%	-5%
60	-10	LINDEMANS	Still light wine	Foster's Group	Australia	5.1%	-1%	50%	-3%
61	-3	E & J	Other brandy	Gallo	USA	4.8%	0%	37%	3%
62	-8	SEAGRAM'S 7 CROWN	US whiskey	Pernod Ricard	USA	4.8%	-1%	35%	-5%
63	2	BLOSSOM HILL	Still light wine	Diageo	USA	4.7%	1%	45%	2%
64	-3	COURVOISIER	Cognac	Beam Global	France	4.6%	0%	59%	0%
65	-8	CINZANO	Light apéritif	Campari	Italy	4.5%	-1%	46%	-2%
66	-3	EL JIMADOR	Tequila	Brown-Forman	Mexico	4.5%	0%	43%	-2%
67	5	COINTREAU	Liqueurs	Rémy Cointreau	France	4.0%	1%	57%	5%
68	0	CUTTY SARK	Blended Scotch	Berry Bros & Rudd	Scotland	3.9%	0%	43%	-2%
69	-7	BLACK VELVET	Canadian whiskey	Brown-Forman	Canada	3.9%	-1%	34%	-4%
70	3	MAKER'S MARK	US whiskey	Beam Global	USA	3.7%	0%	59%	-1%
71	-4	CANADIAN MIST	Canadian whiskey	Brown-Forman	Canada	3.4%	-1%	33%	-2%
72	-13	CACIQUE	Rum / cane	Diageo	Venezuela	3.4%	-1%	37%	-7%
73	3	LAURENT-PERRIER	Champagne	Famille de Nonancourt	France	3.3%	0%	53%	1%
74	7	PIPER HEIDSIECK	Champagne	Rémy Cointreau	France	3.2%	0%	55%	5%
75	10	WOLF BLASS	Still light wine	Foster's Group	Australia	3.1%	1%	55%	-1%
76	-2	MUMM	Champagne	Pernod Ricard	France	3.1%	0%	57%	-1%
77	1	SEAGRAM V.O.	Canadian whiskey	Pernod Ricard	USA	3.0%	0%	42%	5%
78	-3	PASTIS 51	Aniseed	Pernod Ricard	France	2.9%	0%	36%	2%
79	5	DOM PERIGNON	Champagne	LVMH	France	2.8%	0%	72%	-1%
80	-46	MOSKOVSKAYA	Vodka	SPI	Russia	2.8%	-6%	33%	-8%
81	-10	GRAND MARNIER	Liqueurs	Marnier-Lapostolle	France	2.8%	-1%	51%	-5%
82	0	KENDALL-JACKSON	Still light wine	Kendall-Jackson Wine Est.	USA	2.7%	0%	45%	-1%
83	5	BANROCK STATION	Still light wine	Constellation Brands	USA	2.7%	0%	40%	-2%
84	-1	PENFOLDS	Still light wine	Foster's Group	Australia	2.6%	0%	56%	1%
85	13	METAXA	Other brandy	Rémy Cointreau	Greece	2.6%	1%	41%	4%
86	7	INGLENOOK	Still light wine	The Wine Group	USA	2.6%	0%	39%	3%
87	3	DISARONNO	Liqueurs	Illva Saronno	Italy	2.5%	0%	47%	3%
88	1	TORRES	Still light wine	Torres	Spain	2.5%	0%	51%	0%
89	-12	RAMAZZOTTI AMARI	Bitters / spirit apeeritifs	Pernod Ricard	Italy	2.5%	-1%	36%	-5%
90	2	THE MACALLAN	Malt Scotch	Edrington Group	Scotland	2.5%	0%	64%	-2%
91	0	TAITTINGER	Champagne	Taittinger	France	2.4%	0%	55%	-3%
92	3	STOCK BITTERS	Bitters / spirit apéritifs	Eckes & Stock	Germany	2.4%	0%	36%	5%
93	-23	LARIOS	Gin / genever	Beam Global	Spain	2.4%	-1%	34%	-5%
94	-8	BOLS LIQUEURS	Liqueurs	Rémy Cointreau	Holland	2.4%	0%	40%	-1%
95	-1	THE GLENLIVET	Malt Scotch	Pernod Ricard	Scotland	2.4%	0%	59%	-3%
96	4	PAUL MASSON	Other brandy	Constellation Brands	USA	2.3%	0%	33%	4%
97	0	NICOLAS FEUILLATTE	Champagne	CV-CNF	France	2.3%	0%	46%	1%
98	new entry	KUMALA	Still light wine	Constellation Brands	South Africa	2.3%	0%	38%	-5%
99	-20	CASTILLO	Rum / cane	Bacardi-Martini	Cuba	2.2%	-1%	32%	-3%
100	-4	MARTINI SPARKLING	Other sparkling	Bacardi-Martini	Italy	2.1%	0%	44%	1%

***Ketel One's parent company is listed as Nolet Spirits because the creation of a Diageo/Nolet 50:50 company is yet to be completed and profits currently being made by Ketel One go to Nolet Spirits**

predominantly a white rum, is finding it hard to move upmarket, as well as break into the Far East – sales are concentrated in the US and the Caribbean. This explains its 2% score drop.

Cocktail culture, James Bond and near-perfect distribution have held **Martini** in fourth place. This iconic brand "is a must-have on shelf and has kept its relevance to a new generation", comments Whitwell, adding, "it tastes the same everywhere, it's cheap to make, and Daniel Craig/Bond hasn't done it any harm". Further, with Bacardi in the same portfolio, brand support and distribution is unlikely to waver.

Almost defining the Cognac category is **Hennessy** – it sells nearly four times more Cognac than its closest competitor, Martell. Hennessy is also rapidly growing in China, and has a "fantastic duty-free presence". Further, between 2005 and 2007 alone, it has increased global sales by 1m cases.

Absolut, in sixth place, has continued to perform well under Vin & Sprit's guidance and, in particular, Maxxium's management in the US, continuing to enthuse consumers with the addition of new flavours and the likes of Absolut 100. However, over 5m of Absolut's 10.7m cases are sold in the US, a market that is proving vulnerable to falling consumer confidence. But, as Whitwell says, "These brands are as near as you can be to recession proof, and while they might lose some volumes [in the US market], it doesn't mean their brand equity will be eroded." Also, Absolut has proved itself particularly powerful

NO. 35: PATRON

The biggest mover this year is Patrón Tequila which has burst onto the list at 35. It has grown from less than 400,000 cases in 2004 to 1.6 million in 2007, and its entry-level, joven Tequila, Silver, costs US$50 for a 75cl bottle. Further growth is expected as the brand extends outside the US and into style bars around the world, as well as global travel retail. Meanwhile, the Tequila's popularity with celebrities is boosting brand awareness.

in the travel retail sector, a global shop window for the vodka's proliferating flavours and line extensions.

Coming in at number seven is **Jack Daniel's**, which, as Whitwell says, "has enjoyed 15 years continuous growth" and is the world's most popular American spirit brand. However, Whitwell wonders whether it may have reached a "plateau". Now shifting over 9m cases, maintaining the rate of increase may prove "a struggle" as it could lose out against products with "a more powerful heritage, like Johnnie Walker".

Eighth and 10th places are occupied by the two Pernod-owned Scotch whiskies – **Chivas Regal** and **Ballantine's**, respectively. "They are a natural fit in terms of age statement and core markets and Pernod is getting the benefit."

Chivas Regal is particularly strong in the premium 12-year-old category and geographically, the US and Far East, while Ballantine's sells huge volumes in Europe with Finest, an entry-level blended Scotch, and has a loyal following in Korea and Japan for its super-premium 17 year old. "This combination is a winner," says Whitwell.

Between these two whiskies is **Baileys**, in ninth place. With almost 8m cases, Baileys is cream liqueur category leader by some margin and, importantly, still growing strongly, helped by the ongoing addition of flavoured variants.

New entrants

This year's star performer by far is **Patrón**. Bursting onto the top 100 at 35, it has leapt over 70 places from its position last year, just outside the chart. "It has now established itself as a scale player at a super-premium price," says Whitwell, who notes that Bacardi's ownership challenge of the brand is "not holding it back".

"We had the Yellow Tail story, then Grey Goose and now Patrón," adds Whitwell, recalling growth leaders in the three consecutive surveys since 2006. Interestingly, these brand phenomenons came out of the US market, because, as Whitwell reminds, "The three tier system gives innovation a chance."

According to John McDonnell, Patrón's COO, the brand "started international growth three years ago and is now sold in 82 different countries. It is no secret that we are doing extremely well in the US and sometimes trends here go outside the border". As for the brand strategy, "We want to be in key international hotels, clubs and bars where influencers are." Competitors for McDonnell are "super-premium spirits, we are not as much about being a Tequila as being an aspirational brand," while London "is a key market for us".

Patrón enlisted distributor Cellar Trends in the UK market over eight months ago and "distribution has broadened". Duty-free is another vital growth area for the brand, and Patrón in particular has "a great presence" in the new Terminal 5.

Line extensions "are about going upwards" explains McDonnell, citing the Patrón Gran Burdeos, which is finished in a Bordeaux barrel. "You won't see apple, strawberry or peach Patrón," he states, noting that Patrón Café XO has been in the portfolio for 10 years and is finding a valuable home in the Espresso Martini. Finally, when it comes to supply, McDonnell assures the brand has contracts with Agave growers for the "foreseeable future", while "the Bacardi dispute is between Bacardi and the estate, it has not affected the day to day operation of the company and our owner has publicly stated he wants to continue to be privately owned."

THIS YEAR'S STAR PERFORMER BY FAR IS PATRON. BURSTING ONTO THE TOP 100 AT 35, IT HAS LEAPT OVER 70 PLACES FROM ITS POSITION LAST YEAR, JUST OUTSIDE THE CHART

NO. 101+: OUTSIDE HOPES

There are certain brands that didn't make the top 100 but are worthy of note. For example, Pernod's Bourbon brand **Wild Turkey** comes in at 101, Foster's Australian wine **Rosemount** at 102, and then Bacardi's **Eristoff** vodka at 103 – the latter showing fast growing volumes.

Other powerful brands failed to make it into the top 100 because their sales volumes were just too small. These include **Glenmorangie** at 116 and Champagne brands **Louis Roederer**, **Bollinger**, **Perrier-Jouët** and **Krug** at 117, 118, 119 and 120 respectively.

Wine brands **Montana**, **Marqués de Cáceres** and **Campo Viejo** were also not far from the top 100, with positions 121, 126 and 127 respectively.

Finally, **Laphroaig** came in at 130 – a great brand, but again, too small in volume terms.

Aside from Beringer – which was omitted from last year's survey due to inaccurate data – the only other new entrant is Constellation's Kumala which has "just made the grade", according to Whitwell, "and although its image is not rated, it has grown volumes significantly."

Major movers: rising

Rising up the charts this year is **Jim Beam**, moving seven positions to 13th place and 5% in total score. "It has turned a corner," comments Whitwell. "This is because it's doing better in the US, where the Nascar programme has done well for it and it has a strong presence in Australia. However, it's still nowhere near the volume of US whiskey category leader Jack Daniel's."

Grey Goose is up five places to number 23 (4% for total score), scoring particularly well for future growth and price positioning. "It has cachet and growth potential," says Whitwell, and Bacardi as a group is doing a great job with Grey Goose and Dewar's, while the Bacardi brand is holding its own."

Up seven to 24, just below Grey Goose, is **De Kuyper**, with a total score up 4%. In particular, the range of liqueurs scores highly for heritage – the brand's history can be traced back to the 17th century – as well as market share. De Kuyper shifts almost 5m cases internationally.

Fernet-Branca appears to have stormed up the list, rising 27 places, and its brand and total score is up 4%. Like De Kuyper, this brand does well in terms of both heritage and share of market, moving over 3.1m cases and growing.

Finlandia is another mover, up eight places, with a total score rising by 2%. Showing good volume gains, the panelists scored this brand highly for future growth,

Most powerful brand owners

Rank	Owner	Total score	Total brand score	Number in Top 100
1	Diageo	323%	710.8%	12
2	Bacardi Martini	176%	382.1%	7
3	Pernod Ricard	171%	935.2%	18
4	LVMH	81%	291.1%	4
5	Brown-Forman	63%	288%	6
6	Beam Global	52%	370.0%	7
7	Vin & Sprit	41%	71.8%	1
8	Constellation Brands	32%	223%	5
9	Campari	25%	186.6%	4
10	Gallo	22%	91.8%	2
11	Rémy Cointreau	22%	257.9%	1
12	Foster's Group	19%	213.6%	4
13	William Grant & Sons	18%	117.9%	2
14	Mast-Jägermeister	17%	59.8%	1
15	Concha y Toro	15%	58.0%	1
16	De Kuyper	14%	51.6%	1
17	SPI	13%	89.5%	2
18	Edrington Group	11%	116.3%	2
19	Pátron Group	9%	50.7%	1
20	Casella Wines	8%	48.0%	1
21	Fratelli Branca	8%	47.3%	1
22	Freixenet	7%	53.9%	1
23	Nolet Spirits	6%	47.5%	1
24	Trinchero Family Estates	6%	45.0%	1
25	Berry Bros & Rudd	4%	42.9%	1
26	Famille de Nonancourt	3%	53.0%	1
27	Marnier-Lapostolle	3%	51.1%	1
28	Kendall-Jackson Wine Est.	3%	45%	1
29	The Wine Group	3%	39%	5
30	Illva Saronno	3%	47.3%	1
31	Torres	3%	51.4%	1
32	Taittinger	2%	55.0%	1
33	Eckes & Stock	2%	36.4%	1
34	CV-CNF	2%	46.3%	1

Most powerful sectors

Rank	Sector	Total score	Total brand score	Brands in Top 100
1	Whisk(e)y	346%	1311%	24
2	Vodka	179%	433%	8
3	Flavoured spirits	130%	793%	16
4	Rum / cane	123%	273%	5
5	Still light wine	113%	845%	17
6	Brandy	87%	413%	8
7	Sparkling	59%	578%	10
8	Light apéritif	56%	108%	2
9	Tequila	50%	218%	4
10	Gin / genever	46%	302%	6

Most powerful countries of origin

Rank	Country of origin	Total score	Total brand score	Number in Top 100
1	Scotland	238%	797%	14
2	USA	177%	1028%	20
3	France	157%	991%	17
4	Russia	103%	158%	3
5	Cuba	93%	172%	3
6	Italy	77%	283%	7
7	Mexico	56%	267%	5
8	Sweden	41%	72%	1
9	Ireland	41%	138%	2
10	England	35%	226%	4
11	Canada	28%	174%	4
12	Dominican Republic	27%	64%	1
13	Spain	26%	197%	4
14	Australia	26%	266%	5
15	Holland	22%	139%	3
16	Germany	20%	96%	2
17	Brazil	8%	38%	1
18	Finland	8%	52%	1
19	Venezuela	3%	37%	1
20	Greece	3%	41%	1
21	South Africa	2%	38%	1

as it approaches the 3m-case mark. The brand appears well-managed by Brown-Forman, although it doesn't score as well as competitors such as Absolut when it comes to price positioning.

Other major movers up the list include **Glenfiddich**, up 15, **Piper Heidsieck**, up seven, **Dom Pérignon**, up five, **Metaxa**, up 13 and **Inglenook**, up seven.

Major movers: Falling

On the other hand, slipping down the Power 100 is **Stolichnaya**, down 27 to 32. This reflects its small share of market compared to Smirnoff and Absolut – the brand may sell vast volumes within Russia but only over 3m cases at premium prices, around 2m of which are shifted in the US market, where consumer confidence is depressed.

INDIA OFFERS ENORMOUS POTENTIAL AND WILL HAVE TO RELAX BARRIERS TO IMPORTED GOODS SOON IF IT IS TO PARTAKE IN GLOBAL TRADE

Southern Comfort is another slipper, down eight places to 48. Scoring badly for future growth, the brand is just holding volumes and Whitwell suggests that the sweet flavour might be part of the problem. "Consumers tend to move on from the brand quite quickly as their tastes become more sophisticated."

Further down the list fallers include **100 Piper** – down 22 positions – **Cacique**, **Moskovskaya**, **Grand Marnier**, **Ramazzotti Amari**, **Larios** and **Castillo**.

Conclusions

Overall it appears that Scotch is on the move. Why? This one category has a high number of brands with a combination of heritage and an upmarket image, making the category and its associated power brands an extremely strong proposition in the large developing markets of China and India. And in particular it is China that is drving volumes for Scotch, as well as other upmarket dark spirit Cognac, with Hennessy performing especially well in this market.

The US, on the other hand, is already a mature market and India is not yet an "open" market. However, India offers enormous potential and will have to relax barriers to imported goods soon if it is to partake in global trade. Furthermore, Indian companies appear to be buying key Western brands, such as Tata's acquistion of Land Rover and Jaguar, and in spirits, UB Group and Whyte & Mackay.

As for imported white spirits, these too may well have a future in the Far East as a new image-conscious genertion emerges, looking for alternatives to local white spirits.

MOST POWERFUL OWNERS

▸ At time of scoring and writing, Absolut's transfer to Pernod Ricard was yet to be completed, and hence Vin & Sprit still features in the Power 100 2008. To see the impact of this piece of industry consolidation, simply add Vin & Sprit (41%) to Pernod's total score of 176% to give 217%. This is still some way behind leader Diageo's score of 323%, and that's without reflecting the yet-to-be-finalised Ketel One deal.

Power brands: sparkling wine and Champagne

Rank	Brand	Owner	Country of Origin	Overall rank	Total score	Brand score
1	MOET ET CHANDON	LVMH	France	14	20.2%	78%
2	VEUVE CLICQUOT	LVMH	France	26	12.6%	65%
3	FREIXENET	Freixinet	Spain	49	6.7%	54%
4	LAURENT PERRIER	Famille de Nonancourt	France	73	3.3%	53%
5	PIPER HEIDSIECK	Rémy Cointreau	France	74	3.2%	55%
6	MUMM	Pernod Ricard	France	76	3.1%	57%
7	DOM PERIGNON	LVMH	France	79	2.8%	72%
8	TAITTINGER	Taittinger	France	91	2.4%	55%
9	NICOLAS FEUILLATTE	CV-CNF	France	97	2.3%	46%
10	MARTINI SPARKLING WINE	Bacardi-Martini	Italy	100	2.1%	44%

Power brands: gin

Rank	Brand	Owner	Country of Origin	Overall rank	Total score	Brand score
1	GORDON'S	Diageo	England	22	14.4%	59%
2	TANQUERAY	Diageo	England	40	7.9%	56%
3	SEAGRAM	Pernod Ricard	USA	41	7.8%	42%
4	BEEFEATER	Pernod Ricard	England	45	7.1%	54%
5	BOMBAY	Bacardi-Martini	England	50	6.1%	56%
6	LARIOS	Beam Global	Spain	93	2.4%	34%

Power brands: vodka

Rank	Brand	Owner	Country of Origin	Overall rank	Total score	Brand score
1	SMIRNOFF	Diageo	Russia	1	90.0%	69%
2	ABSOLUT	Vin & Sprit	Sweden	6	41.5%	72%
3	GREY GOOSE	Bacardi-Martini	France	23	14.2%	59%
4	STOLICHNAYA	SPI	Russia	32	10.2%	57%
5	FINLANDIA	Brown-Forman	Finland	43	7.6%	52%
6	SKYY	Campari	USA	46	7.1%	45%
7	KETEL ONE	Nolet Spirits	Holland	51	6.0%	48%
8	MOSKOVSKAYA	SPI	Russia	80	2.8%	33%

Power brands: flavoured spirits

Rank	Brand	Owner	Country of Origin	Overall rank	Total score	Brand score
1	BAILEYS	Diageo	Ireland	9	29.5%	71%
2	JAGERMEISTER	Mast-Jägermeister	Germany	17	17.4%	60%
3	DE KUYPER	De Kuyper	Holland	24	13.6%	52%
4	RICARD	Pernod Ricard	France	25	13.6%	44%
5	MALIBU	Pernod Ricard	USA	29	11.0%	56%
6	BRANCA FERNET	Frantelli Branca	Italy	39	8.0%	47%
7	SOUTHERN COMFORT	Brown-Forman	USA	48	6.8%	51%
8	KAHLUA	Pernod Ricard	Mexico	56	5.7%	49%
9	CAMPARI	Campari	Italy	57	5.5%	58%
10	COINTREAU	Rémy Cointreau	France	67	4.0%	57%
11	PASTIS 51	Pernod Ricard	France	78	2.9%	36%
12	GRAND MARNIER	Marnier-Lapostolle	France	81	2.8%	51%
13	DISARONNO	Illva Saronno	Italy	87	2.5%	47%
14	RAMAZZOTTI AMARI	Pernod Ricard	Italy	89	2.5%	36%
15	STOCK BITTERS	Eckes & Stock	Germany	92	2.4%	36%
16	BOLS LIQUEURS	Rémy Cointreau	Holland	94	2.4%	40%

Power brands: Tequila

Rank	Brand	Owner	Country of Origin	Overall rank	Total score	Brand score
1	CUERVO	Diageo	Mexico	11	27.8%	71%
2	SAUZA	Beam Global	Mexico	34	9.2%	53%
3	PATRON	Pátron Group	Mexico	35	8.7%	51%
4	EL JIMADOR	Brown-Forman	Mexico	66	4.5%	43%

Power brands: brandy

Rank	Brand	Owner	Country of Origin	Overall rank	Total score	Brand score
1	HENNESSY	LVMH	France	5	44.9%	77%
2	MARTELL	Pernod Ricard	France	30	11.0%	63%
3	REMY MARTIN	Rémy Cointreau	France	33	9.5%	65%
4	DREHER	Campari	Brazil	42	7.6%	38%
5	E & J	Gallo	USA	61	4.8%	37%
6	COURVOISIER	Beam Global	France	64	4.6%	59%
7	METAXA	Rémy Cointreau	Greece	85	2.6%	41%
8	PAUL MASSON	Constellation	USA	96	2.3%	33%

Sparkling

Champagne brands have once more done extremely well in the Power 100, and for Whitwell, "As a growth brand at the top end **Veuve Clicquot** heads the list. More is made of Moët but a great brand opportunity exists with Veuve." Also, Pernod's Mumm, "has the vineyards and heritage but has suffered from changing hands from Seagram to Allied to Pernod".

Gin

Gordon's has dropped out of the top 20 this year, down four places. The may be due to category decline but also parent company Diageo's focus on its larger brands.

Vodka

The demand for vodka, driven by the ever growing call for cocktails, shows no sign of abating and **Smirnoff** leads the category by some margin. As for **Absolut**, transfer from Vin & Sprit to Pernod Ricard should further increase distribution and sales.

Flavoured spirits

Top 10 power brand **Baileys** is still storming, helped by the the addition of an expanding range of Baileys flavours. German herbal liqueur **Jägermeister** also seems to keep moving, shifting 5.4 million cases, mostly in the US as shots.

Tequila

This category has proved, as predicted last year, a growth area, significantly boosted by new arrival **Patrón**. Traditionally US market driven, Tequila is now finding new homes for its top brands.

Brandy

With both luxury and volume in its favour, **Hennessy** dominates this category, although **Martell**, 25 places lower, is moving up the list.

Power brands: rum

Rank	Brand	Owner	Country of Origin	Overall rank	Total score	Brand score
1	BACARDI	Bacardi Martini	Cuba	3	80.3%	78%
2	CAPTAIN MORGAN	Diageo	Dominican Republic	12	26.8%	64%
3	HAVANA CLUB	Pernod Ricard	Cuba	31	10.2%	63%
4	CACIQUE	Diageo	Venezuela	72	3.4%	37%
5	CASTILLO	Bacardi Martini	Cuba	99	2.2%	32%

Power brands: light apéritifs

Rank	Brand	Owner	Country of Origin	Overall rank	Total score	Brand score
1	MARTINI	Bacardi Martini	Italy	4	51.5%	63%
2	CINZANO	Campari	Italy	65	4.5%	46%

Power brands: wine

Rank	Brand	Owner	Country of Origin	Overall rank	Total score	Brand score
1	GALLO	Gallo	USA	18	17.0%	54%
2	HARDYS	Constellation Brands	USA	19	16.2%	56%
3	CONCHA Y TORO	Concha y Toro	Spain	21	14.6%	58%
4	ROBERT MONDAVI	Constellation Brands	USA	36	8.6%	56%
5	YELLOWTAIL	Casella Wines	Australia	38	8.2%	48%
6	BERINGER	Foster's Group	USA	44	7.6%	52%
7	JACOBS CREEK	Pernod Ricard	Australia	47	7.0%	56%
8	SUTTER HOME	Trinchero Family Estates	USA	52	6.0%	45%
9	LINDEMANS	Foster's Group	Australia	60	5.1%	50%
10	BLOSSOM HILL	Diageo	USA	63	4.7%	45%
11	WOLF BLASS	Foster's Group	Australia	75	3.1%	55%
12	KENDALL JACKSON	Brown-Forman	USA	82	2.7%	45%
13	BANROCK STATION	Constellation Brands	USA	83	2.7%	40%
14	PENFOLDS	Foster's Group	Australia	84	2.6%	56%
15	INGLENOOK	The Wine Group	USA	86	2.6%	39%

Power brands: whisk(e)y

Rank	Brand	Owner	Country of origin	Overall rank	Total score	Brand score
1	JOHNNIE WALKER	Diageo	Scotland	2	87.6%	81%
2	JACK DANIELS	Brown-Forman	USA	7	36.6%	75%
3	CHIVAS REGAL	Pernod Ricard	Scotland	8	32.7%	69%
4	BALLANTINES	Pernod Ricard	Scotland	10	29.4%	67%
5	JIM BEAM	Beam Global	USA	13	20.4%	62%
6	DEWARS	Bacardi-Martini	Scotland	15	19.2%	51%
7	J & B	Diageo	Scotland	16	17.9%	57%
8	CROWN ROYAL	Diageo	Canada	20	14.6%	54%
9	GRANTS	William Grant & Sons	Scotland	27	12.5%	52%
10	JAMESON	Pernod Ricard	Ireland	28	11.4%	67%
11	FAMOUS GROUSE	Edrington Group	Scotland	37	8.2%	53%
12	CANADIAN CLUB	Beam Global	Canada	53	5.9%	53%
13	GLENFIDDICH	William Grant & Sons	Scotland	54	5.8%	66%
14	BELLS	Diageo	Scotland	55	5.8%	47%
15	TEACHERS	Beam Global	Scotland	58	5.4%	51%
16	100 PIPERS	Pernod Ricard	Scotland	59	5.1%	38%
17	SEAGRAM'S 7 CROWN	Pernod Ricard	USA	62	4.8%	35%

Strongest brands: top 20

Rank	Brand	Sector	Owner	Country of origin	Brand score	Total score	Rank
1	JOHNNIE WALKER	Blended Scotch	Diageo	Scotland	81%	87.6%	2
2	BACARDI	Rum / cane	Bacardi-Martini	Cuba	78%	80.3%	3
3	MOET ET CHANDON	Champagne	LVMH	France	78%	20.2%	14
4	HENNESSY	Cognac	LVMH	France	77%	44.9%	5
5	JACK DANIELS	US whiskey	Brown-Forman	USA	75%	36.6%	7
6	ABSOLUT	Vodka	Vin & Spirit	Sweden	72%	41.5%	6
7	DOM PERIGNON	Champagne	LVMH	France	72%	2.8%	79
8	BAILEYS	Liqueurs	Diageo	Ireland	71%	29.5%	9
9	CUERVO	Tequila	Diageo	Mexico	71%	27.8%	11
10	CHIVAS REGAL	Blended Scotch	Pernod Ricard	Scotland	69%	32.7%	8
11	SMIRNOFF	Vodka	Diageo	Russia	69%	90.0%	1
12	BALLANTINE'S	Blended Scotch	Pernod Ricard	Scotland	67%	29.4%	10
13	JAMESON	Blended Irish whiskey	Pernod Ricard	Ireland	67%	11.4%	28
14	GLENFIDDICH	Malt Scotch	William Grant & Sons	Scotland	66%	5.8%	54
15	VEUVE CLICQUOT	Champagne	LVMH	France	65%	12.6%	26
16	REMY MARTIN	Cognac	Rémy Martin	France	65%	9.5%	33
17	CAPTAIN MORGAN	Rum / cane	Diageo	Dominican Republic	64%	26.8%	12
18	THE MACALLAN	Malt Scotch	Edrington Group	Scotland	64%	2.5%	90
19	MARTELL	Cognac	Pernod Ricard	France	63%	11.0%	30
20	HAVANA CLUB	Rum / cane	Pernod Ricard	Cuba	63%	10.2%	31

Rum

Dominating the category and third most powerful brand is **Bacardi**. However, can it move upmarket and conquer the Far East? **Captain Morgan** is benefiting from the growing popularity of dark rum in the US and Spain. **Cacique** has lost some ground due to its narrow market scope and volume loss.

Light apéritifs

Martini defines this category and has proved itself a highly valuable Power Brand at number four, enjoying a total score increase of 8%. **Cinzano**, however, has slipped in terms of position and score.

Wine

Wine is increasing its presence, with **Kumala** and **Beringer** breaking onto the list. **Hardys** at 19th place is catching up on **Gallo** at 18th, which Whitwell attributes to the growing number of Hardys wines at higher price points. **Concha y Toro** is also doing well, mainly due to Casillero del Diablo's premium pricing and performance.

Whisk(e)y

Fast approaching 16m cases **Johnnie Walker** not only leads this category but may take top spot overall next year. This, along with Pernod's **Chivas Regal** and **Ballantine's** makes Scotch an extremely powerful global branded proposition. However **J&B** suffers from being in Johnnie Walker's shadow at Diageo.

Strongest brands

Brand strength, not power, is a measure of the aggregated scores for each brand *without* multiplying the result by the product's weighted volume. This ensures **Moët** shoots up the chart, as does its prestige cuvée **Dom Pérignon**. Interestingly, **Smirnoff** falls outside the top 10 in this chart.

Power brands: ranked by awareness

Rank	Brand	Sector	Owner	Country of origin	Overall rank	Total score	Brand score	Awareness
1	BACARDI	Rum / cane	Bacardi-Martini	Cuba	3	80.3%	78%	9.9
2	JOHNNIE WALKER	Blended Scotch	Diageo	Scotland	2	87.6%	81%	9.3
3	MOET ET CHANDON	Champagne	LVMH	France	14	20.2%	78%	9.0
4	SMIRNOFF	Vodka	Diageo	Russia	1	90.0%	69%	8.9
5	DOM PERIGNON	Champagne	LVMH	France	79	2.8%	72%	8.7
6	JACK DANIELS	US whiskey	Brown-Forman	USA	7	36.6%	75%	8.6
7	MARTINI	Light apéritif	Bacardi-Martini	Italy	4	51.5%	63%	8.4
8	HENNESSY	Cognac	LVMH	France	5	44.9%	77%	8.0
9	BAILEYS	Liqueurs	Diageo	Ireland	9	29.5%	71%	8.0
10	CUERVO	Tequila	Diageo	Mexico	11	27.8%	71%	7.7

Power brands: ranked by heritage

Rank	Brand	Sector	Owner	Country of origin	Overall rank	Total score	Brand score	Heritage
1	DOM PERIGNON	Champagne	LVMH	France	79	2.8%	72%	9.0
2	MOET ET CHANDON	Champagne	LVMH	France	14	20.2%	78%	8.6
3	BACARDI	Rum / cane	Bacardi-Martini	Cuba	3	80.3%	78%	8.4
4	JOHNNIE WALKER	Blended Scotch	Diageo	Scotland	2	87.6%	81%	8.3
5	HENNESSY	Cognac	LVMH	France	5	44.9%	77%	8.0
6	COURVOISIER	Cognac	Beam Global	France	64	4.6%	59%	7.9
7	JACK DANIELS	US whiskey	Brown-Forman	USA	7	36.6%	75%	7.7
8	GLENFIDDICH	Malt Scotch	William Grant & Sons	Scotland	54	5.8%	66%	7.7
9	VEUVE CLICQUOT	Champagne	LVMH	France	26	12.6%	65%	7.7
10	REMY MARTIN	Cognac	Rémy Cointreau	France	33	9.5%	65%	7.6

Power brands: ranked by price positioning

Rank	Brand	Sector	Owner	Country of origin	Overall rank	Total score	Brand score	Premium price positioning
1	DOM PERIGNON	Champagne	LVMH	France	79	2.8%	72%	9.4
2	HENNESSY	Cognac	LVMH	France	5	44.9%	77%	7.7
3	MAKERS MARK	US whiskey	Beam Global	USA	70	3.7%	59%	7.3
4	THE MACALLAN	Malt Scotch	Edrington Group	Scotland	90	2.5%	64%	7.3
5	VEUVE CLICQUOT	Champagne	LVMH	France	26	12.6%	65%	7.1
6	GREY GOOSE	Vodka	Bacardi-Martini	France	23	14.2%	59%	7.1
7	CHIVAS REGAL	Blended Scotch	Pernod Ricard	Scotland	8	32.7%	69%	7.0
8	BAILEYS	Liqueurs	Diageo	Ireland	9	29.5%	71%	6.9
9	ABSOLUT	Vodka	Vin & Sprit	Sweden	6	41.5%	72%	6.7
10	TANQUERAY	Gin / genever	Diageo	England	40	7.9%	56%	6.7

Power brands: ranked by market scope

Rank	Brand	Sector	Owner	Country of origin	Overall rank	Total score	Brand score	Market scope
1	JOHNNIE WALKER	Blended Scotch	Diageo	Scotland	2	87.6%	81%	8.6
2	BACARDI	Rum / cane	Bacardi-Martini	Cuba	3	80.3%	78%	8.6
3	JACK DANIELS	US whiskey	Brown-Forman	USA	7	36.6%	75%	8.1
4	MOET ET CHANDON	Champagne	LVMH	France	14	20.2%	78%	7.6
5	CHIVAS REGAL	Blended Scotch	Pernod Ricard	Scotland	8	32.7%	69%	7.4
6	BAILEYS	Liqueurs	Diageo	Ireland	9	29.5%	71%	7.4
7	ABSOLUT	Vodka	Vin & Sprit	Sweden	6	41.5%	72%	7.4
8	HENNESSY	Cognac	LVMH	France	5	44.9%	77%	7.3
9	CUERVO	Tequila	Diageo	Mexico	11	27.8%	71%	7.3
10	SMIRNOFF	Vodka	Diageo	Russia	1	90.0%	69%	7.3

CONSIDERING DOM PERIGNON SELLS OVER 100,000 CASES GLOBALLY, IT IS IMPRESSIVE THE CHAMPAGNE RETAINS A US$100-PLUS PRICE TAG – AND THAT'S IN THE OFF-TRADE ALONE

Awareness

Ranking the power brands according to the aggregated and averaged scores for brand awareness pushes **Bacardi** to the top of the pile. With its distinctive bat logo and long-running Latin Quarter campaign, this brand has toppled **Johnnie Walker** in this year's rankings.

Heritage

Named after the very inventor of Champagne in the late seventeenth century, chart leader **Dom Pérignon** has a powerful image centred on the history of the product, although this Moët & Chandon brand was first released in 1936. Also benefiting from a high perceived heritage is **Moët**, which was established in 1743.

Price

Dom Pérignon comes top once more when the Power Brands are ranked on price alone. Considering it sells over 100,000 cases globally, it is impressive the Champagne retains a US$100-plus price tag in all markets, and that's in the off-trade alone – significantly more is charged for this brand in the world's top bars and clubs. There's also the Oenothèque range of rare and high-priced back vintages to consider, as well as the highly collectible large formats.

Market scope

Given the might of Diageo's distribution, it's not surprising **Johnnie Walker** comes out top. Not only does this brand have the full attention of the world's largest spirits company, but a history dating back to 1820 and a marketing message that's consistent in all countries. Its top-end blends also have a strong presence in the important travel retail market.

Power brands: ranked by relevancy

Rank	Brand	Sector	Owner	Country of origin	Overall rank	Total score	Brand score	Relevancy
1	JOHNNIE WALKER	Blended Scotch	Diageo	Scotland	2	87.6%	81%	8.0
2	MOET ET CHANDON	Champagne	LVMH	France	14	20.2%	78%	8.0
3	BACARDI	Rum / cane	Bacardi-Martini	Cuba	3	80.3%	78%	7.7
4	JACK DANIELS	US whiskey	Brown-Forman	USA	7	36.6%	75%	7.4
5	ABSOLUT	Vodka	Vin & Sprit	Sweden	6	41.5%	72%	7.4
6	HENNESSY	Cognac	LVMH	France	5	44.9%	77%	7.4
7	THE MACALLAN	Malt Scotch	Edrington Group	Scotland	90	2.5%	64%	7.3
8	BAILEYS	Liqueurs	Diageo	Ireland	9	29.5%	71%	7.1
9	VEUVE CLICQUOT	Champagne	LVMH	France	26	12.6%	65%	6.9
10	MAKERS MARK	US whiskey	Beam Global	USA	70	3.7%	59%	6.9

Power brands: ranked by brand perception

Rank	Brand	Sector	Owner	Country of Origin	Overall rank	Total score	Brand score	Brand perception
1	DOM PERIGNON	Champagne	LVMH	France	79	2.8%	72%	8.9
2	JOHNNIE WALKER	Blended Scotch	Diageo	Scotland	2	87.6%	81%	8.3
3	HENNESSY	Cognac	LVMH	France	5	44.9%	77%	8.3
4	BACARDI	Rum / cane	Bacardi-Martini	Cuba	3	80.3%	78%	8.1
5	JACK DANIELS	US qhiskey	Brown-Forman	USA	7	36.6%	75%	8.0
6	ABSOLUT	Vodka	Vin & Sprit	Sweden	6	41.5%	72%	8.0
7	MOET ET CHANDON	Champagne	LVMH	France	14	20.2%	78%	7.9
8	THE MACALLAN	Malt Scotch	Edrington Group	Scotland	90	2.5%	64%	7.6
9	CHIVAS REGAL	Blended Scotch	Pernod Ricard	Scotland	8	32.7%	69%	7.6
10	BAILEYS	Liqueurs	Diageo	Ireland	9	29.5%	71%	7.4

Power brands: ranked by growth prospects

Rank	Brand	Sector	Owner	Country of Origin	Overall rank	Total score	Brand score	Future Growth
1	GREY GOOSE	Vodka	Bacardi-Martini	France	23	14.2%	59%	7.3
2	HENNESSY	Cognac	LVMH	France	5	44.9%	77%	7.0
3	JOHNNIE WALKER	Blended Scotch	Diageo	Scotland	2	87.6%	81%	6.9
4	ABSOLUT	Vodka	Vin & Sprit	Sweden	6	41.5%	72%	6.9
5	HAVANA CLUB	Rum / cane	Pernod Ricard	Cuba	31	10.2%	63%	6.7
6	CUERVO	Tequila	Diageo	Mexico	11	27.8%	71%	6.6
7	MOET ET CHANDON	Champagne	LVMH	France	14	20.2%	78%	6.4
8	JAMESON	Blended Irish whiskey	Pernod Ricard	Ireland	28	11.4%	67%	6.4
9	BALLANTINES	Blended Scotch	Pernod Ricard	Scotland	10	29.4%	67%	6.4
10	JAGERMEISTER	Bitters / spirit apéritifs	Mast-Jägermeister	Germany	17	17.4%	60%	6.3

Power brands: ranked by share of market

Rank	Brand	Sector	Owner	Country of Origin	Overall rank	Total score	Brand score	Share of market
1	BACARDI	Rum / cane	Bacardi-Martini	Cuba	3	80.3%	78%	9.6
2	JOHNNIE WALKER	Blended Scotch	Diageo	Scotland	2	87.6%	81%	9.0
3	MARTINI	Light apéritif	Bacardi-Martini	Italy	4	51.5%	63%	8.7
4	BAILEYS	Liqueurs	Diageo	Ireland	9	29.5%	71%	8.4
5	SMIRNOFF	Vodka	Diageo	Russia	1	90.0%	69%	8.3
6	MOET ET CHANDON	Champagne	LVMH	France	14	20.2%	78%	8.0
7	GALLO	Still light wine	Gallo	USA	18	17.0%	54%	8.0
8	HENNESSY	Cognac	LVMH	France	5	44.9%	77%	7.9
9	JACK DANIELS	US whiskey	Brown-Forman	USA	7	36.6%	75%	7.9
10	CUERVO	Tequila	Diageo	Mexico	11	27.8%	71%	7.7

BACARDI DOMINATES THE GLOBAL MARKET FOR BRANDED RUM. SUCH IS ITS SUPREMACY THE SLIGHTEST CHANGE IN ITS FORTUNES AFFECTS THE WHOLE CATEGORY

Relevancy

With its range of labels from Red to Blue, and special additions, **Johnnie Walker** has a whisky for every price point and target market. Further, its Keep Walking global branding campaign, begun in 1999, based on personal progress, has international appeal, whatever the consumer group.

Perception

The product itself, Champagne, has a powerful image but **Dom Pérignon** takes this further, with its beautiful classic bottle and label, and association with famous figures including the fictional James Bond; the very inventor of Champagne; and now an association with fashion designer Karl Lagerfeld.

Growth Prospects

Grey Goose has continued to grow under Bacardi's guidance, adding 600,000 cases to its sales in 2007 alone, taking its total to 3.6 million cases. It was felt by panelists to be a long way from fulfilling its volume potential, based on historical growth rates and the distribution and marketing expertise afforded the brand by Bacardi, who bought it in 2004 from Sidney Frank for US$2 billion.

Market share

With almost 20 million cases, **Bacardi** dominates the global market for branded rum. Nearest competitor **Captain Morgan** sells 7,800m cases, while **Havana Club** shifts 3m. Such is Bacardi's supremacy the slightest change in the brand's fortunes affects the whole category.

Further, many consumers see the brand as simply a fun, premium and highly mixable white spirit – the fact that it is a rum is not widely appreciated or strictly relevant to its success.

The panel

Employed to score the brands was an extremely powerful panel of people at the top of the global drinks industry. Its members have been involved with all of the major drinks companies and held positions of responsibility in virtually every market. Between them, they hold detailed financial and marketing knowledge of each brand covered in this report.

- **Stuart Whitwell** spent 10 years with Hiram Walker in Europe and Asia Pacific, specialising in brand and market development projects. He then set up a consultancy undertaking projects for Brown-Forman, Pernod Ricard and José Estevez in China and the Philippines, as well as for Allied, Pernod Ricard, Fortune Brands and Angostura. He is co-founder and joint MD of Intangible Business, which specialises in valuing intangible assets, such as brands, for financial, management and litigation purposes.
- **Allan Caldwell** has considerable international experience and was most recently finance and commercial services director for Allied Domecq's duty-free division. He has since been heavily involved in the drinks industry through his work as a director of Intangible Business.
- **Malcolm Davis** has held many senior positions in international drinks management, notably in Asia Pacific markets. He has worked at Hiram Walker and Allied Domecq and was a senior director at Harveys of Bristol, Suntory and Baskin Robbins. Malcolm is a director of Duval-Leroy Champagne and Intangible Business.
- **Patrick Gillon**'s specialist markets are continental Europe and Latin America. His career spans senior marketing and management positions in UDV, Hiram Walker and Allied Domecq, with whom he was president of Latin America for four years. Patrick has recently been involved in valuing Allied Domecq's brands as part of its acquisition by Pernod Ricard and Fortune Brands.
- **Donard Gaynor** is managing director, international, Beam Global Spirits & Wine. He also sits on the board of Maxxium Holdings, the global sales and distribution arm for Beam Global. Prior to joining Beam, Gaynor was senior VP and CFO for The Seagram Spirits & Wine Group. Gaynor was previously a partner in the New York office of Price Waterhouse Coopers.
- **Jamie Odell** is managing director of Foster's Australia, Asia and Pacific. He was previously managing director of Foster's Wine Estates. Before joining Foster's in April 2000, Odell held management roles with Allied Domecq in the UK and Asia Pacific.
- **Charles Richardson** has spent his entire career in the wine and spirits industry, latterly as president of Allied Domecq duty- free for 11 years. He is now a consultant for Intangible Business.
- ***the drinks business*** also joined the panel.

BETWEEN THEM, THE SCORING PANEL HOLD DETAILED FINANCIAL AND MARKETING KNOWLEDGE OF EACH BRAND COVERED IN THIS REPORT

SCORING SYSTEM

Methodology

Nearly 200 of the largest brands in the wine and spirits industries were scored by eight panelists to derive a list of the 100 most powerful alcoholic drinks brands. Power is defined by a brand's ability to generate value for its owner. Value is classified by a series of measures as identified below.

Hard measures

- Share of market: volume-based measure of market share
- Brand growth: projected growth based on five years' historical data and future trends
- Price positioning: a measure of a brand's ability to command a premium
- Market scope: number of markets in which the brand has a significant presence

Soft measures

- Brand awareness: a combination of prompted and spontaneous awareness
- Brand relevancy: capacity to relate to the brand and a propensity to purchase
- Brand heritage: a brand's longevity and a measure of how it is embedded in local culture
- Brand perception: loyalty and how close a strong brand image is to a desire for ownership

A panel independently ranked each brand out of 10 on the above measures (10 = high, 0 = low). The scores were aggregated and averaged to reach a total score for each brand. A total score was achieved by multiplying a brand's weighted volume by its brand score (a derivative of the eight measures of brand strength), within a defined range. The weighting is designed to adjust the volumes to a comparable level.