



INTANGIBLE
BUSINESS

THE POWER 100
THE WORLD'S MOST
POWERFUL SPIRITS &
WINE BRANDS, 2012



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1. INTRODUCTION

The past year has seen the global mega brands prove their worth, led by Johnnie Walker and Absolut but complemented by some stand out performances from the likes of Aperol, Wild Turkey, Jameson and Chivas Regal.

Having a significant presence in the emerging markets of China and Brazil without reliance on the more depressed European markets has been key to growth, particularly for Scotch and Cognac brands. Breaking down the brands by their owners quickly reveals those companies that have made the most of these new markets and those that have not.

Diageo and Pernod Ricard's mega brands have demonstrated strong growth, outstripping Bacardi Martini at the top of the spirits league. Diageo's continued domination of the industry is largely down to the incredible performance by Johnnie Walker and Smirnoff remaining unmoved at the top of the rankings for another year.

Meanwhile Campari, Remy Cointreau and Beam have also performed formidably well across a range of categories with Beam Inc and Campari Group being the stand out performers.

2. METHODOLOGY

Nearly 10,000 brands in the spirits and wine sectors were researched to derive a list of the 100 most powerful spirits and wine brands in the world. The population for the research is all current and potential users of alcoholic drinks.

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.

Scoring

Hard measures

- Share of market: volume based measure of market share
- Future growth: projected growth based on 10 years historical data and future trends
- Premium 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 of leading experts in the drinks industry independently ranked each selected brand out of 10 on the above measures (10 = high, 0 = low). The scores given by the individual panel members 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, within a defined range. The weighting is designed to adjust the volumes to a comparable level. Brand score is a derivative of the eight measures of brand strength. This results in a ranking of the world's most powerful spirits and wine brands.

PANELISTS

The panel of drinks experts has over 200 year's combined experience in the global drinks industry. They 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 every brand covered in this report, and many more besides. Nearly 10,000 brands were looked at in the compilation of this research, across all markets, in every territory.

Stuart Whitwell, *Joint Managing Director of Intangible Business*

Stuart spent 10 years with Hiram Walker in Europe and Asia Pacific, specialising in brand and market business development projects, holding various senior positions in finance, business development and general management, latterly as regional director of finance and business development for Asia Pacific. Since leaving Hong Kong, where he set up a consultancy undertaking projects for Brown-Forman, Pernod Ricard and Jose Estevez in China and the Philippines, Stuart has carried out many projects for drinks companies such as Absolut, Allied Domecq, Campari, Pernod Ricard, Fortune Brands and Angostura. Stuart is co-founder and joint managing director of Intangible Business.



Alan Craig, *Director at Intangible Business*

Alan has dedicated his business life to the drinks industry, working for companies including Whitbread and Allied Domecq. He has held numerous senior positions, such as head of customer services for Long John Whisky Distillers, financial controller for brands such as Ballantine's and Teacher's and was finance director for a number of spirits brands including Beefeater Gin and Lamb's Navy Rum. He has also been further involved in the drinks industry through his work with Intangible Business.



Allan Caldwell, *Director at Intangible Business*

Allan has considerable international drinks experience working throughout Europe, North and South America and the Far East. For 10 years he held a variety of senior, commercial and finance roles and was responsible for numerous business restructurings, acquisitions and sustained profit growth, latterly as finance & commercial services director for Allied Domecq's Duty Free division. He has since been heavily involved in the drinks industry through his work as with Intangible Business.



Donard Gaynor, *Senior Vice President Corporate Development Beam Global Spirits & Wine*

Gaynor is responsible for the company's industry relations and advancing the company's growth strategy by building strategic commercial business partnerships. Gaynor served as Senior Vice President and Managing Director International from 2003 to 2010, responsible for Beam Global's international business, credited with leading the Allied brand acquisition and integration. Prior to joining Beam, Gaynor spent nearly 10 years at The Seagram Spirits & Wine Group in a variety of executive leadership positions, including SVP of human resources, CIO, SVP Operations and CFO. Gaynor also helped to lead the sale of Seagram's global business to Diageo and Pernod-Ricard. Prior to his spirits and wine experience, Gaynor spent more than 14 years in the New York office of PwC.



Lou Applebaum, *SVP, Strategy and Business Development, Constellation Brands*

Lou oversees the global marketing council and focuses on commercial aspects of mergers and acquisitions and corporate strategy at Constellation Brands. Along with these duties, he is also responsible for the strategic planning process which includes updating and internally communicating the company's overarching strategy, integrating the strategy with the company's long term financial vision, and working with the operating companies to ensure alignment of strategies across the organization.



Malcolm Davis, *Executive Director of Duval-Leroy Champagne*

Malcolm 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 Harvey's of Bristol Ltd, Suntory and Baskin Robbins. Malcolm is currently an executive director of Duval-Leroy Champagne and a director of Intangible Business.



Patrick Gillon, *Director of Brand Strategy and Development*

Intangible Business Continental Europe and Latin America are Patrick's specialist markets. 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 is currently involved in several Continental Europe initiatives.



Patrick Schmitt, Editor of The Drinks Business

Patrick Schmitt is editor of The Drinks Business, a leading international drinks trade publication at the forefront of what is happening in the industry. Published monthly, The Drinks Business is often the first to hear about new development. It launched a new research arm, Drinks Insight with more research and data analysis than in any other trade title. This, combined with its many reports and continued attendance at all the international fairs, give the Drinks Business team a privileged insight into the latest industry trends.

**Paul Wayvon, Managing Director of Intangible Business, US**

Paul Wayvon became Managing Director of Intangible Business US in 2008. He qualified as a Chartered Accountant with PriceWaterhouseCoopers in 1982 and earned his MBA with Michigan State University in 1992. Paul is a former CFO and COO of major international drinks businesses in the US including Hiram Walker, Allied Domecq and Fleming Packaging Corporation, working with brands including Maker's Mark, Clos du Bois, Callaway, Bacardi and Malibu. He is also on the faculty at Bradley University with instructing and lecturing responsibilities in their undergraduate, graduate and MBA programs.



3. GROUPS

Campari emerged in 2011 as a significant international drinks group and the performance of its brands this year means it continues to grow stronger and stronger. All six of Campari's major brands featured in the top 100 – Skyy, Dreher, Aperol, Cinzano Vermouth, Campari Bitters and Wild Turkey – showcased impressive growth, Aperol in particular having shot up the rankings by 20 places. Though none of its brand featured in the top 10 or even the top 20, that all of them improved their positions on the previous year really says something about the way its brands are being managed and that Campari has managed a consistency that is not so evident in other groups. Wild Turkey was another stand-out performer with 31% growth.

With the Asian markets leading much of the movements for brands this year, Diageo has made bold and effective moves into these emerging consumer areas particularly with Johnnie Walker. According to Diageo, 40% of its revenues come from emerging economies and it is likely to keep much of its focus on these new markets as opposed to the more problem-riddled EU and US. With 14 brands in the top 100, only Pernod Ricard can boast more. Despite having fewer brands in the Power 100 rankings, Diageo boasts a total score of 298% compared to Pernod's 200%. Additionally, with Smirnoff boasting sales of roughly 24 million cases for the previous year, Pernod's nearest competitor in terms of size – Absolut – is still miles off challenging the King of vodka brands.

Though it undoubtedly remains a highly capable and powerful player in the drinks and spirits industry, Pernod has slipped a little this year, outperformed by Diageo. Nevertheless, Pernod has proven itself more than capable of managing its brands, with three sitting in the top ten and 18 brands featured in the Power 100 overall. Chivas Regal held its ranking at number eight, pushed by growth in China and the other Asian markets, proving that Pernod is just as savvy to the importance of these emerging economies as Diageo is. The re-positioning of Absolut in terms of pricing in the US proved another wise move as the vodka brand managed 8% sales growth. Though the \$8.3 billion acquisition of Absolut was seen as a high price to pay at the time of the deal, it seems to have been a very smart move as the Absolut vodka brand continues to increase its brand power and market share.

Both Diageo and Pernod Ricard have proved capable of managing, indeed growing and improving, their top brands within the last year, particularly with recognition of the desire for Scotch and Cognac in the Asian markets.

Beam, like Campari, managed strong growth in most of their brands despite sitting well behind the undoubted behemoths such as Diageo and Pernod Ricard. It proved a highly competent brand manager with sales of Jim Beam up by almost 600,000 cases and climbing further up the rankings to sit at number 15. Jim Beam, Maker's Mark and Teacher's all showed outstanding performance and improvement for the year. Along with the entry of Whisky DYC it is evident that Beam knows how to manage its whiskeys.

4. BIGGEST MOVERS GOING UP



CHANTRÉ +26 PLACES

Chantré is a new entrant this year having leapt up from 117th place in 2011 to 91st for 2012. The German Brandy made by Eckes Stock shows promise for the future having begun to carve out a strong brand image for itself within its key markets.



WHISKY DYC +25 PLACES

Whisky DYC is another brand that has shown huge improvements from last year increasing its brand score by 22%. With a turbulent economy, the Spanish market has moved away from more expensive whisky brands to quality value alternatives such as Whisky DYC.



APEROL +20 PLACES

Aperol has been storming the Italian and German markets managing a huge 35% market growth. Aperol's success is indicative of a market wide development in the light aperitif category this year.



NICOLAS FEUILLATTE +19 PLACES

One of only five champagne brands to make it into the Power 100, Nicolas Feuillatte impressed the panel in terms of heritage and brand perception, increasing its brand score by 18% from last year.



WILD TURKEY +17 PLACES

Showcasing a 31% growth in sales volumes led by the US, Australian and Japanese markets, the Campari owned brand has shown strong improvement.



WILLIAM LAWSON'S +16 PLACES

Sitting on a similar pricing tier to other scotches such as Ballantine's (10) and Cutty Sark (66), the Bacardi owned brand has fared well over the last year in terms of its competitors with good potential for future growth.



GORDON'S VODKA +14 PLACES

The 14 place move by Gordon's Vodka is more reflective of the shifts in other brands this year than in much improvement by Gordon's in sales volumes or brand scoring. The brand has in fact remained fairly static in both areas over the last few years.



RAMAZZOTTI AMARO +13 PLACES

One of last year's new entrants Ramazzotti Amaro continues to perform well this year with the panel scoring the brand much higher in both its market scope and consumer awareness.



CUTTY SARK +13 PLACES

A very impressive 13 place move for Cutty Sark, showcasing a 21% increase in its brand score for the year and an increase in scoring across the hard and soft measures likely led by 15% sales volume growth.



DISARONNO +12 PLACES

Having dropped out of the Power 100 last year, Disaronno once again moved its way back in with a strong twelve place climb. Whilst its sales remain largely the same year on year, its heritage and brand perception means it remains prominent in the spirits market.

5. BIGGEST MOVERS GOING DOWN



BOMBAY SAPPHIRE -16 PLACES

Though a 16 place drop would seem to indicate problems, it is in fact more a testament to the incredible success of other brands this year than a sign of any weakness in the Bombay brand.



GLENFIDDICH -12 PLACES

Glenfiddich continues last year's fall as it lost further market share this year, outperformed by other scotches such as the indomitable Johnnie Walker.



LINDEMANS -11 PLACES

Lindeman's also continues its decline, though far more steeply this year sinking 11 places down the rankings.



SUTTER HOME -11 PLACES

Sutter is another brand that drops again this year, falling another eleven places with a 6% decrease in its brand score.



LAURENT PERRIER -10 PLACES

Despite its steady position in 2010 and 2011, Laurent Perrier this year moved down 10 places in the rankings despite improved sales figures.



RUSSIAN STANDARD -10 PLACES

Russian Standard slips further down the rankings to no. 54 as competitors such as Absolut stress other players in the vodka market.



KAHLUA -9 PLACES

Kahlua's gradual decline continues as it slips 9 places in the rankings with sales remaining largely stagnant for the last few years.



KENDALL JACKSON -9 PLACES

With a focus on slightly higher priced wines compared to some of its direct competitors, Kendall Jackson falls 9 places this year despite having shown a lot of promise in 2010 after gaining the accolade as highest-selling brand of 'super-premium' wine in the US.



G. H. MUMM -8 PLACES

G. H. Mumm drops a further 8 places this year meaning it has moved down 16 places since 2010's report. Though its sales volumes crept back up they are yet to return to their peak of 0.7m in 2008 and 2009.



SAUZA -8 PLACES

After it climbed 6 places in 2011, the tequila brand once again falls back down the rankings by 8 places with a 2% fall in year on year growth.

6. MEGA BRANDS

This year we have decided to focus on a new category: mega brands. Mega brands are those brands that managed a total score of 18% upwards, spanning across a range of drinks categories.

RANK	BRAND	BRAND OWNER	VOLUME 9LTR C/S MILLION	VOLUME INCREASE/DECREASE MILLION	TOTAL SCORE 2012	BRAND SCORE 2012
1	SMIRNOFF	DIAGEO	24.0	0.2	85%	71%
2	JOHNNIE WALKER	DIAGEO	15.8	1.6	74%	73%
3	BACARDI	BACARDI MARTINI	19.6	0.3	65%	66%
4	MARTINI VERMOUTH	BACARDI MARTINI	16.3	0.4	55%	68%
5	HENNESSY	LVMH	4.5	0.2	39%	76%
6	ABSOLUT	PERNOD RICARD	11.2	0.8	39%	69%
7	JACK DANIEL'S	BROWN-FORMAN	10.0	0.4	38%	76%
8	CHIVAS REGAL	PERNOD RICARD	4.6	0.4	33%	72%
9	CAPTAIN MORGAN	DIAGEO	9.0	0.4	30%	66%
10	BALLANTINE'S	PERNOD RICARD	6.4	0.6	24%	58%
11	JÄGERMEISTER	MAST-JÄGERMEISTER	6.8	0.2	22%	66%
12	BAILEYS	DIAGEO	5.9	0.2	20%	67%
13	JOSÉ CUERVO	DIAGEO	6.1	0.2	20%	65%
14	GALLO	GALLO	20.5	0.1	19%	62%
15	JIM BEAM	BEAM INC	5.9	0.6	18%	62%
16	CONCHA Y TORO	CONCHA Y TORO	17.5	0.3	18%	67%

Looking outside of the top ten brands we see the entry of two flavoured spirits – Jägermeister and Baileys. Jägermeister remains in the same position as last year having strongly positioned itself as the shot drink of choice alongside tequila for students and young adults. The German digestif also continues to align itself with its target audience by focusing on sponsorship of music festivals and promotion by heavy metal bands. Baileys remains largely unchanged from 2011 with relatively low growth begging the question as to whether it is somewhat running out of steam. What's more, as the brand moves away from solely focusing on the classic flavour to the introduction of a new range – including the most recent, Biscotti – Diageo run the risk of diluting the strength of the brand. The fact that they launched a £2.5m marketing campaign for the release of the Biscotti version may be a sign that

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previous releases were not as successful as they had hoped.

José Cuervo is the only tequila to make it onto the mega brands list and with sales of around 6.1 million cases per year it is more than double the size of Sauza, its closest competitor. Another Diageo owned brand, it appears to be suffering a similar fate to Baileys. Whilst its sales remain strong, it has remained largely static since last year and sales are still well below what they were from 2006 through to 2009.

One of the few spirits categories not to make the list at all is gin. The top gin brand, Gordon's, only ranked 28th this year with virtually no improvement on sales from 2010 begging the question as to why Diageo, who would otherwise seem to be master of the mega brand, have failed to push their gin into this category. Is it, perhaps, that Diageo can only handle so many power brands in their portfolio meaning that Gordon's suffers as a result? The same argument could be made for J&B which suffered a 6% fall in sales as, unsurprisingly, Johnnie Walker attracts the lion's share of attention for Diageo in the scotch category.

The only wine brands to manage a total score of over 18% are Gallo and Concha Y Toro. With sales volumes of 20.5 million, Gallo remains well above other competitors in the light wine market, however Concha Y Toro has a strong brand equity and opportunity to grow at premium price points.

7. THE TOP 10

1. SMIRNOFF



Whilst it remains once more at the top, the once supreme Smirnoff has been scarred by promotional pricing within the key US market. Its year on year growth sits at around 1% as it has failed to expand its market share with competitors like Absolut showcasing far stronger improvements. Its brand score slipped further yet this year, down from 75% to 71% led by a noticeable decline in its brand perception and future growth scorings. In 2008, Smirnoff saw a record sales figure of 26.2m cases and, down to 24m for 2011, it is yet to claw its way back to that position of strength. Nevertheless, with Absolut's sales at 11.2m cases, there is no question that it will take some time for any other vodka to supersede the King.

2. JOHNNIE WALKER



Johnnie Walker manages to creep up a spot largely due to impressive sales growth of 10% for the year. The Scotch brand has shown particularly strong performance in the Far East, a hugely influential and important market to help the future growth of many of the top spirits brands. It has also seen impressive sales in Brazil, the biggest growth market for Scotch. What's more, Diageo have managed to create a brand that spans across different pricings, from the top end blue label to the accessible red label and the legendary black label, giving it a wider appeal than many of its competitors. With a growth in sales of 1.5m cases between 2010 and 2011, Johnnie Walker is evidence of how well Diageo can and does manage its mega brands. This is one of the best annual brand performances we have witnessed.



3. BACARDI

Bacardi's drop from second to third place is more evidence of Johnnie Walker's superb performance for the year rather than a sign of any weakness in the rum brand. The reliance of Bacardi on sales in the turbulent EU and US markets, with only a minor presence in the Asian markets, also goes some way to explain why the rum brand has failed to improve much on sales within the last year.



4. MARTINI

Martini remains in fourth position for the third year in a row with other brands unable to shift it. Its brand scoring remains at 68%, the same as 2011, and growth remains fairly small but with its strong heritage and the continued buoyancy in the cocktail market, the Italian vermouth remains well at the top of the aperitif sector with sales of 16.3m cases for the year, dwarfing sales of Jägermeister at 6.8m.



5. HENNESSY

With a growth of 300,000 cases for the year, Hennessy completely outstrips its closest competitor, Martell. Much like Johnnie Walker, its sales increase was very much led by growth in the Far East allowing it to push up two places this year, an incredible move to make so high up the rankings. It is also a particularly formidable increase for a high end product. Asian demand has driven Hennessy's impressive growth as owner, LVMH, has targeted the growing middle class in China. Sales there were particularly driven by more expensive, premium and super premium variants.



6. ABSOLUT

After years with very small movement in sales figures, Absolut finally managed an 8% increase for the year. As Smirnoff continues to decline, Absolut on the other hand has begun bolstering its sales largely thanks to lowered prices in the US. It has become powerful enough to stress other players and the only reason it has slipped down a place this year is because it was outperformed by the likes of Johnnie Walker and Hennessy.



7. JACK DANIEL'S

The US market has remained a key one for Jack Daniel's pushing its 4% year on year growth as the US market recovered further from recession. It also managed to show some growth in the Asian market, though to a much lesser extent than some of the other brands in the top 10. Having only slipped one place, JD remains the key player in the US whiskey market whilst keeping a slow and steady growth into other geographical areas.



8. CHIVAS REGAL

Chivas Regal had another superb year with a 400,000 case growth following an increase in net sales of 5% for the previous year. China remains Chivas Regal's largest market alongside Korea, Japan and, to a lesser extent, the US. Its brand score only dropped 1%, allowing it to remain firmly in eighth position but it continues to be outperformed by Johnnie Walker.



9. CAPTAIN MORGAN

Captain Morgan remains the second largest rum spirit brand despite sales figures half of its closest category leader, Bacardi. It managed to maintain growth with an increase of 4% in sales though its brand score slipped by 4%. Though it has maintained its position its performance is rather outshone by many other brands for the year.



10. BALLANTINE'S

The third Pernod owned brand in the top ten, Ballantine's maintains its rankings from 2011. The blended scotch brand has maintained steady growth and kept pace with competitors with a 10% year on year growth.

8. STAR PERFORMERS

Each year we at Intangible Business recognise those brands that have performed particularly well and deserve attention. This year we have chosen to award those brands that increased their sales volumes by over half a million from the previous year.

Four brands fall into that category, each of whom has managed spectacular improvement in their sales figures from the previous year.



JOHNNIE WALKER – 1.6m case increase, 10% up from 2010

Total volume – 15.8 million cases



ABSOLUT – 800,000 case increase, 8% up from 2010

Total volume – 11.2 million cases



APEROL – 700,000 case increase, 35% up from 2010

Total volume – 2.5 million cases



JAMESON – 500,000 case increase, 16.5% up from 2010

Total volume – 3.4 million cases



9. BRANDS THAT DESERVE A SPECIAL MENTION



COURVOISIER

For years hovering around 1 million cases annually, Courvoisier has surged by 300,000 up to 1.34m in 2011 showcasing a 27% volume increase. This is a formidable achievement and is backed up by significant brand investment in mixability in 2012. One to watch.



TEACHER'S

Another 200,000 case growth for this year compounding the 150,000 case growth in the previous year. Teacher's is benefitting from leading positions in Brazil and India alongside the UK and Europe.



HAVANA CLUB

The rum brand managed a very impressive 400,000 case increase with a 10% growth in volume. This is a beautiful brand with lots of momentum.

El Ron de Cuba



JIM BEAM

Jim Beam saw a 600,000 case increase in sales volume with 11% year-on-year growth. Beam have got it right in the US & Australia. Is this the first sign of a big resurgence in Bourbon and in Beam in particular?

**MARTELL**

A 220,000 case increase and 14% year-on-year growth means Martell is close to being a 2m case brand. This acceleration has been largely driven by the Far East markets.

**REMY MARTIN**

The cognac brand showcased a 150,000 case increase with 12% year-on-year growth. Much like Martell, the cognac had very strong performance in the Asian markets.

10. TOP SECTORS

MOST POWERFUL SECTORS

RANK	CHANGE	SECTOR	TOTAL SCORE	TOTAL BRAND SCORE	BRANDS IN TOP 100
1	-	WHISKY	333.2%	1506.0%	26
2	-	VODKA	205.6%	774.0%	14
3	1	FLAVOURED SPIRITS	117.4%	764.0%	14
4	-1	RUM/CANE	110.3%	237.0%	4
5	-	STILL LIGHT WINE	104.8%	780.0%	14
6	-	BRANDY	81.9%	460.0%	8
7	-	LIGHT APERITIF	67.7%	183.0%	3
8	-	SPARKLING	47.1%	408.0%	7
9	1	GIN / GENEVER	41.6%	326.0%	6
10	-1	TEQUILA	40.9%	220.0%	4

12. LEADING GROWTH BRANDS

Rank	Brand	Brand Owner	Category	Volume 9ltr c/s million	Volume increase/decrease million	% Year on Year Volume increase	Total score 2012	Brand score 2012
1	APEROL	Campari	Light Aperitif	2.6	0.7	35%	7%	53%
2	WILLIAM LAWSON	Bacardi Martini	Scotch	2.3	0.6	35%	6%	52%
3	WILD TURKEY	Campari	Bourbon	1.1	0.3	31%	3%	60%
4	COURVOISIER	Beam Inc	Cognac	1.3	0.3	27%	5%	58%
5	JAMESON	Pernod Ricard	Irish Whiskey	3.4	0.5	16%	12%	57%
6	MAKERS MARK	Beam Inc	Bourbon	1.2	0.2	16%	6%	66%
7	CUTTY SARK	The Edrington Group	Scotch	1.4	0.2	15%	5%	71%
8	MARTELL	Pernod Ricard	Cognac	1.8	0.2	14%	10%	53%
9	REMY MARTIN	Remy Cointreau	Cognac	1.5	0.2	12%	6%	54%
10	JIM BEAM	Beam Inc	Bourbon	5.9	0.6	11%	18%	62%
11	TEACHERS	Beam Inc	Scotch	2.1	0.2	11%	6%	57%
12	JOHNNIE WALKER	Diageo	Scotch	15.8	1.6	10%	74%	73%
13	BALLANTINE'S	Pernod Ricard	Scotch	6.4	0.6	10%	24%	58%
14	HAVANA CLUB	Pernod Ricard	Rum	3.8	0.3	10%	12%	64%

13. STRONGEST BRANDS

STRONGEST BRANDS

RANK	BRAND	BRAND SCORE 2012	CHANGE
1	HENNESSY	76%	-3%
1	JACK DANIELS	76%	-5%
3	JOHNNIE WALKER	73%	-10%
4	CHIVAS REGAL	72%	-1%
5	SMIRNOFF	71%	-4%
5	CUTTY SARK	71%	21%
7	MOËT ET CHANDON	70%	-7%
8	ABSOLUT	69%	-6%
9	MARTINI VERMOUTH	68%	0%
9	BEEFEATER	68%	7%

MOST POWERFUL WHISKY BRANDS

RANK	BRAND	OVERALL RANK	TOTAL SCORE 2012	CHANGE	BRAND SCORE 2012	CHANGE
1	JOHNNIE WALKER	2	74%	-4%	73%	-10%
2	JACK DANIEL'S	7	38%	-1%	76%	-5%
3	CHIVAS REGAL	8	33%	2%	72%	-1%
4	BALLANTINE'S	10	24%	0%	58%	-6%
5	JIM BEAM	15	18%	2%	62%	2%
6	DEWARS	18	13%	-5%	42%	-11%
7	CROWN ROYAL	21	13%	-1%	52%	8%
8	JAMESON	22	12%	0%	57%	-13%
9	J&B	24	12%	0%	60%	5%
10	GRANT'S	25	12%	0%	49%	-1%
11	FAMOUS GROUSE	43	8%	0%	55%	-3%
12	SEAGRAM'S 7 CROWN	45	7%	1%	59%	18%
13	BELL'S	46	7%	1%	55%	8%
14	WILLIAM LAWSON'S	55	6%	2%	52%	9%
15	MAKER'S MARK	58	6%	1%	66%	3%
16	TEACHER'S	60	6%	1%	57%	6%
17	BLACK VELVET	62	6%	1%	55%	13%
18	CANADIAN CLUB	64	6%	0%	57%	2%
19	CUTTY SARK	66	5%	2%	71%	21%
20	CANADIAN MIST	68	5%	1%	58%	20%
21	100 PIPERS	72	5%	1%	53%	15%
22	CLAN CAMPBELL	73	4%	1%	48%	8%
23	GLENFIDDICH	77	4%	-1%	53%	-11%
24	WILD TURKEY	83	3%	1%	60%	7%
25	WHISKY DYC	84	3%	1%	56%	34%
26	SEAGRAM V.O.	95	3%	1%	50%	10%

MOST POWERFUL VODKA BRANDS

RANK	BRAND	OVERALL RANK	TOTAL SCORE 2012	CHANGE	BRAND SCORE 2012	CHANGE
1	SMIRNOFF	1	85%	-4%	71%	-4%
2	ABSOLUT	6	39%	0%	69%	-6%
3	GREY GOOSE	19	13%	-3%	55%	-12%
4	SVEDKA	31	10%	-1%	55%	-8%
5	STOLICHNAYA	37	9%	-1%	50%	-7%
6	SKYY	32	10%	1%	58%	1%
7	FINLANDIA	38	9%	1%	60%	-6%
8	RUSSIAN STANDARD	54	6%	-1%	48%	-7%
9	KETEL ONE	50	7%	1%	55%	1%
10	WYBOROWA	74	4%	0%	51%	6%
11	ERISTOFF	75	4%	1%	54%	12%
12	THREE OLIVES	78	4%	1%	55%	15%

MOST POWERFUL RUM BRANDS

RANK	BRAND	OVERALL RANK	TOTAL SCORE 2012	CHANGE	BRAND SCORE 2012	CHANGE
1	BACARDI	3	65%	-4%	66%	-13%
2	CAPTAIN MORGAN	9	30%	0%	66%	-4%
3	HAVANA CLUB	23	12%	1%	64%	-1%
4	CACIQUE	80	4%	0%	41%	2%

MOST POWERFUL FLAVOURED SPIRITS BRANDS

RANK	BRAND	OVERALL RANK	TOTAL SCORE 2012	CHANGE	BRAND SCORE 2012	CHANGE
1	JÄGERMEISTER	11	22%	-1%	66%	-4%
2	BAILEYS	12	20%	0%	67%	-1%
3	RICARD	20	13%	-4%	47%	-15%
4	DE KUYPER	26	12%	1%	48%	-5%
5	MALIBU	36	9%	-1%	51%	-7%
6	FERNET-BRANCA	44	8%	0%	46%	1%
7	SOUTHERN COMFORT	49	7%	0%	62%	2%
8	CAMPARI BITTERS	61	6%	1%	43%	-16%
9	KAHLUA	70	5%	0%	57%	2%
10	BOLS LIQUEURS	76	4%	1%	55%	10%
11	RAMAZZOTTI AMARO	79	4%	1%	56%	14%
12	COINTREAU	81	4%	1%	66%	14%
13	DISARONNO	99	3%	0%	53%	-5%
14	STOCK BITTERS	100	3%	1%	47%	12%

MOST POWERFUL LIGHT APERITIF BRANDS

RANK	BRAND	OVERALL RANK	TOTAL SCORE 2012	CHANGE	BRAND SCORE 2012	CHANGE
1	MARTINI VERMOUTH	4	55%	1%	68%	0%
2	APEROL	48	7%	4%	53%	10%
3	CINZANO VERMOUTH	56	6%	2%	62%	14%

MOST POWERFUL BRANDY BRANDS

RANK	BRAND	OVERALL RANK	TOTAL SCORE 2012	CHANGE	BRAND SCORE 2012	CHANGE
1	HENNESSY	5	39%	1%	76%	-3%
2	MARTELL	33	10%	-1%	53%	-12%
3	DREHER	39	9%	2%	53%	17%
4	E&J BRANDY	40	8%	2%	53%	12%
5	RÉMY MARTIN	59	6%	0%	54%	-6%
6	COURVOISIER	71	5%	1%	58%	0%
7	PAUL MASSON	89	3%	0%	55%	13%
8	CHANTRE	91	3%	1%	58%	28%

MOST POWERFUL CHAMPAGNE & SPARKLING WINE BRANDS

RANK	BRAND	OVERALL RANK	TOTAL SCORE 2012	CHANGE	BRAND SCORE 2012	CHANGE
1	MOËT ET CHANDON	17	17%	0%	70%	-7%
2	VEUVE CLICQUOT	27	12%	1%	64%	-7%
3	FREIXENET	51	6%	0%	57%	2%
4	MARTINI SPARKLING WINE	86	3%	1%	60%	10%
5	NICOLAS FEUILLATTE	88	3%	1%	58%	18%
6	G. H. MUMM	93	3%	0%	54%	-3%
7	LAURENT PERRIER	96	3%	0%	45%	-5%

MOST POWERFUL WINE BRANDS

RANK	BRAND	OVERALL RANK	TOTAL SCORE 2012	CHANGE	BRAND SCORE 2012	CHANGE
1	GALLO	14	19%	-2%	62%	5%
2	CONCHA Y TORO	16	18%	2%	67%	4%
3	ROBERT MONDAVI	30	10%	-17%	64%	-3%
4	HARDYS	34	9%	1%	60%	5%
5	YELLOWTAIL	35	9%	1%	53%	4%
6	BERINGER	53	6%	0%	48%	-3%
7	JACOB'S CREEK	63	6%	0%	56%	4%
8	BLOSSOM HILL	65	6%	1%	58%	5%
9	SUTTER HOME	67	5%	-1%	41%	-6%
10	LINDEMANS	69	5%	0%	50%	-2%
11	TORRES WINE	82	3%	0%	56%	0%
12	INGLENOOK	85	3%	1%	53%	14%
13	KENDALL JACKSON	81	3%	0%	52%	0%
14	WOLF BLASS	92	3%	0%	60%	6%

MOST POWERFUL TEQUILA BRANDS

RANK	BRAND	OVERALL RANK	TOTAL SCORE 2012	CHANGE	BRAND SCORE 2012	CHANGE
1	JOSÉ CUERVO	13	20%	-1%	65%	-5%
2	PATRÓN	29	10%	0%	55%	-4%
3	SAUZA	42	8%	-2%	53%	-7%
4	EL JIMADOR	94	3%	0%	47%	2%

MOST POWERFUL GIN BRANDS

RANK	BRAND	OVERALL RANK	TOTAL SCORE 2012	CHANGE	BRAND SCORE 2012	CHANGE
1	GORDON'S GIN	28	12%	-1%	54%	-3%
2	BEEFEATER	41	8%	1%	68%	7%
3	SEAGRAM GIN	47	7%	1%	50%	9%
4	TANQUERAY	52	6%	-1%	54%	-6%
5	BOMBAY SAPPHIRE	57	6%	-1%	51%	-15%
6	LARIOS	97	3%	0%	49%	7%

MOST POWERFUL BRANDS BY BRAND SCORE

SHARE OF MARKET

RANK	BRAND	SCORE
1	SMIRNOFF	9.5
2	MOËT ET CHANDON	9.0
3	JACK DANIELS	8.4
3	CONCHA Y TORO	8.4
3	HENNESSY	8.4
6	BACARDI	8.0
6	BAILEYS	8.0
6	JOHNNIE WALKER	8.0
9	GALLO	7.6
10	MARTINI VERMOUTH	7.1

FUTURE GROWTH

RANK	BRAND	SCORE
1	TEACHER'S	7.0
1	APEROL	7.0
3	BELL'S	6.5
4	CAPTAIN MORGAN	6.3
5	CUTTY SARK	6.1
6	HENNESSY	6.0
6	JOHNNIE WALKER	6.0
6	CHIVAS REGAL	6.0
6	JÄGERMEISTER	6.0
6	JIM BEAM	6.0

PREMIUM PRICE POSITIONING

RANK	BRAND	SCORE
1	HENNESSY	7.1
2	CHIVAS REGAL	7.0
3	VEUVE CLICQUOT	7.0
3	SOUTHERN COMFORT	7.0
3	GREY GOOSE	7.0
3	COINTREAU	6.6
7	MAKER'S MARK	6.6
7	CINZANO VERMOUTH	6.6
7	REMY MARTIN	6.6
8	JAEGERMEISTER	6.5

MARKET SCOPE

RANK	BRAND	SCORE
1	JOHNNIE WALKER	9.0
1	SMIRNOFF VODKA	9.0
3	JACK DANIELS	8.4
4	CHIVAS REGAL	8.0
4	BACARDI	8.0
4	BAILEYS	8.0
7	HENNESSY	7.9
8	CUTTY SARK	7.1
9	COINTREAU	7.0
9	CONCHA Y TORO	7.0

AWARENESS

RANK	BRAND	SCORE
1	SMIRNOFF VODKA	9.5
2	BAILEYS	9.0
3	JACK DANIELS	8.9
4	JOHNNIE WALKER	8.0
4	BACARDI	8.0
4	HENNESSY	8.0
4	ABSOLUT	8.0
4	MOET ET CHANDON	8.0
9	CHIVAS REGAL	7.5
9	BEEFEATER	7.5

RELEVANCE

RANK	BRAND	SCORE
1	JOHNNIE WALKER	8.0
1	ABSOLUT	8.0
3	HENNESSY	7.8
4	JACK DANIELS	7.3
4	MAKER'S MARK	7.3
6	SMIRNOFF VODKA	7.0
6	BAILEYS	7.0
6	CHIVAS REGAL	7.0
6	BEEFEATER	7.0
6	CUTTY SARK	7.0

HERITAGE

RANK	BRAND	SCORE
1	JACK DANIELS	8.3
2	CHIVAS REGAL	8.0
2	CUTTY SARK	8.0
2	HAVANA CLUB	8.0
5	HENNESSY	7.8
6	JIM BEAM	7.6
7	BEEFEATER	7.3
7	GLENFIDDICH	7.3
9	MOET ET CHANDON	7.2
10	COINTREAU	7.1

BRAND PERCEPTION

RANK	BRAND	SCORE
1	HENNESSY	8.1
2	HAVANA CLUB	8.0
3	MOET ET CHANDON	8.0
4	CUTTY SARK	7.6
5	CONCHA Y TORO	7.6
6	JACK DANIELS	7.4
7	BEEFEATER	7.4
8	MARTINI VERMOUTH	7.3
9	ROBERT MONDAVI	7.3
10	MAKER'S MARK	7.1

14. BIGGEST BRAND OWNERS

RANK	CHANGE	OWNER	TOTAL SCORE TOTAL	CHANGE	BRAND SCORE TOTAL	CHANGE	NUMBER IN TOP 100	CHANGE
1	-	DIAGEO	298%	4%	823%	86%	14	2
2	-	PERNOD RICARD	200%	-6%	1014%	-86%	18	-2
3	-	BACARDI MARTINI	166%	-16%	448%	-22%	8	-
4	-	LVMH	68%	-1%	210%	-16%	3	-
5	-	BROWN-FORMAN	61%	1%	303%	25%	5	-
6	-	BEAM GLOBAL	54%	8%	458%	70%	8	1
7	-	CAMPARI	40%	9%	329%	33%	6	-
8	-	CONSTELLATION	29%	1%	229%	18%	4	-
9	-	GALLO	27%	3%	115%	18%	2	-
10	-	MAST-JÄGERMEISTER	22%	-1%	66%	-5%	1	-
11	3	CONCHA Y TORO	18%	2%	67%	4%	1	-
12	-1	WILLIAM GRANT & SONS	16%	-4%	102%	-63%	2	-1
13	-1	TREASURY WINE ESTATES (PREVIOUSLY FOSTERS)	14%	-2%	158%	-55%	3	-1
14	1	DE KUYPER / BEAM GLOBAL	12%	0%	48%	-5%	1	-
15	2	PATRÓN GROUP	10%	-1%	55%	-3%	1	-
16	-3	RÉMY COINTREAU	9%	-7%	120%	-128%	2	-3
17	3	ACCOLADE WINES	9%	1%	60%	5%	1	-
18	1	CASELLA WINES	9%	1%	53%	4%	1	-
19	-1	SPI	9%	-1%	50%	-1%	1	-
20	-4	EDRINGTON GROUP	8%	-3%	55%	-53%	1	-1
21	-	FRANTELLI BRANCA	8%	1%	46%	1%	1	-
22	1	DIAGEO AND NOLET FAMILY	7%	1%	55%	1%	1	-
23	1	FREIXINET	6%	0%	57%	2%	1	-
24	-2	RUSSIAN STANDARD	6%	-1%	48%	-7%	1	-
25	-	ECKES STOCK	5%	NEW ENTRY	105%	NEW ENTRY	2	-
26	-1	SUTTER HOME WINERY	5%	-1%	41%	-6%	1	-

The Power 100. The World's Most Powerful Spirits & Wine Brands, 2012

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27	-	ABN AMRO CAPITAL AND MANAGEMENT	4%	NEW ENTRY	55%	NEW ENTRY	1	-
28	2	PROXIMO SPIRITS	4%	1%	55%	15%	1	-
29	-3	TORRES FAMILY	3%	0%	56%	0%	1	-
30	-	CV-CNF	3%	NEW ENTRY	58%	NEW ENTRY	1	-
31	1	THE WINE GROUP	3%	3%	53%	14%	1	-
32	-	WHITE ROCK DISTILLERIES	3%	NEW ENTRY	45%	NEW ENTRY	1	-
33	-6	JACKSON FAMILY WINES	3%	0%	52%	0%	1	-
34	-6	ILLVA SARONNO	3%	0%	53%	-5%	1	-
35	-6	BERNARD DE NONANCOURT	3%	0%	45%	-5%	1	-

15. COUNTRIES OF ORIGIN

MOST POWERFUL COUNTRIES OF ORIGIN

RANK	CHANGE	COUNTRY OF ORIGIN	TOTAL SCORE TOTAL	CHANGE	TOTAL BRAND SCORE	CHANGE	NUMBER IN TOP 100	CHANGE
1	0	SCOTLAND	213%	-3%	798%	-86%	14	-2
2	0	USA	178%	19%	1090%	134%	19	2
3	0	FRANCE	129%	-8%	745%	-96%	13	-1
4	0	RUSSIA	104%	-1%	223%	36%	4	1
5	1	ITALY	91%	9%	441%	28%	8	5
6	-1	CUBA	77%	-12%	130%	-15%	1	-1
7	0	SWEDEN	49%	-1%	124%	-15%	2	0
8	0	MEXICO	46%	-2%	227%	-59%	5	0
9	0	ENGLAND	39%	3%	330%	47%	6	-
10	0	AUSTRALIA	32%	0%	279%	-39%	5	-1
11	0	IRELAND	32%	0%	124%	-13%	2	0
12	2	CANADA	31%	3%	272%	77%	5	1
13	NEW ENTRY	DOMINICAN REPUBLIC	30%	NEW ENTRY	66%	NEW ENTRY	1	NEW ENTRY
14	4	GERMANY	28%	5%	171%	100%	3	2
15	3	HOLLAND	23%	1%	158%	7%	3	0
16	3	CHILE	18%	2%	67%	4%	1	0
17	3	SPAIN	16%	4%	218%	64%	4	1
18	4	FINLAND	9%	1%	60%	6%	1	0
19	4	BRAZIL	9%	3%	53%	17%	1	0
20	4	POLAND	4%	0%	51%	7%	1	0
21	4	VENEZUELA	4%	1%	41%	2%	1	0

SCOTLAND

RANK	BRAND	SUB CATEGORY	OWNER	OVERALL RANK
1	JOHNNIE WALKER	BLENDED SCOTCH	DIAGEO	2
2	CHIVAS REGAL	BLENDED SCOTCH	PERNOD RICARD	8
3	BALLANTINES	BLENDED SCOTCH	PERNOD RICARD	10
4	DEWAR'S	BLENDED SCOTCH	BACARDI MARTINI	18
5	J & B	BLENDED SCOTCH	DIAGEO	24
6	GRANTS SCOTCH	BLENDED SCOTCH	WILLIAM GRANT & SONS	25
7	FAMOUS GROUSE	BLENDED SCOTCH	EDRINGTON GROUP	43
8	BELL'S	BLENDED SCOTCH	DIAGEO	46
9	WILLIAM LAWSON'S	BLENDED SCOTCH	BACARDI MARTINI	55
10	TEACHER'S	BLENDED SCOTCH	BEAM INC	60
11	CUTTY SARK	BLENDED SCOTCH	THE EDRINGTON GROUP	66
12	100 PIPERS	BLENDED SCOTCH	PERNOD RICARD	72
13	CLAN CAMPBELL	BLENDED SCOTCH	PERNOD RICARD	73
14	GLENFIDDICH	MALT SCOTCH	WILLIAM GRANT & SONS	77

ITALY

RANK	BRAND	SUB CATEGORY	OWNER	OVERALL RANK
1	MARTINI VERMOUTH	LIGHT APERITIF	BACARDI MARTINI	4
2	FERNET-BRANCA	BITTERS / SPIRIT APERITIFS	FRANTELLI BRANCA	44
3	APEROL	LIGHT APERITIF	CAMPARI	48
4	CINZANO VERMOUTH	LIGHT APERITIF	CAMPARI	56
5	CAMPARI BITTERS	BITTERS / SPIRIT APERITIFS	CAMPARI	61
6	RAMAZZOTTI AMARI	BITTERS / SPIRIT APERITIFS	PERNOD RICARD	79
7	MARTINI SPARKLING WINE	OTHER SPARKLING	BACARDI MARTINI	86
8	DISARONNO	LIQUEURS	ILLVA SARONNO	99

USA

RANK	BRAND	SUB CATEGORY	OWNER	OVERALL RANK
1	JACK DANIELS	US WHISKEY	BROWN-FORMAN	7
2	GALLO	STILL LIGHT WINE	GALLO	14
3	JIM BEAM	US WHISKEY	BEAM INC	15
4	ROBERT MONDAVI	STILL LIGHT WINE	CONSTELLATION	30
5	SKYY	US VODKA	CAMPARI	32
6	MALIBU	LIQUEURS	PERNOD RICARD	36
7	E & J BRANDY	OTHER BRANDY	GALLO	40
8	SEAGRAM'S 7 CROWN	US WHISKEY	DIAGEO	45
9	SEAGRAM GIN	GIN / GENEVER	PERNOD RICARD	47
10	SOUTHERN COMFORT	LIQUEURS	BROWN-FORMAN	49
11	BERINGER	STILL LIGHT WINE	TREASURY WINE ESTATES	53
12	MAKER'S MARK	US WHISKEY	BEAM INC	58
13	BLOSSOM HILL	STILL LIGHT WINE	DIAGEO	65
14	SUTTER HOME	STILL LIGHT WINE	SUTTER HOME WINERY	67
15	WILD TURKEY	US WHISKEY	CAMPARI	83
16	INGLENOOK	STILL LIGHT WINE	THE WINE GROUP	85
17	PAUL MASSON	OTHER BRANDY	CONSTELLATION	89
18	KENDALL JACKSON	STILL LIGHT WINE	JACKSON FAMILY WINES	90

SWEDEN

RANK	BRAND	SUB CATEGORY	OWNER	OVERALL RANK
1	ABSOLUT	VODKA	PERNOD RICARD	6
2	SVEDKA	VODKA	CONSTELLATION	31

FRANCE

RANK	BRAND	SUB CATEGORY	OWNER	OVERALL RANK
1	HENNESSY	COGNAC	LVMH	5
2	MOET ET CHANDON	CHAMPAGNE	LVMH	17
3	GREY GOOSE	FRENCH VODKA	BACARDI MARTINI	19
4	RICARD	ANISEED	PERNOD RICARD	20
5	VEUVE CLICQUOT	CHAMPAGNE	LVMH	27
6	MARTELL	COGNAC	PERNOD RICARD	33
7	REMY MARTIN	COGNAC	REMY COINTREAU	59
8	COURVOISIER	COGNAC	BEAM INC	71
9	COINTREAU	LIQUEURS	REMY COINTREAU	81
10	NICOLAS FEUILLATTE	CHAMPAGNE	CV-CNF	88
11	G. H. MUMM	CHAMPAGNE	PERNOD RICARD	93
12	LAURENT PERRIER	CHAMPAGNE	BERNARD DE NONANCOURT	96
13	PINNACLE	FRENCH VODKA	WHITE ROCK DISTILLERIES	98

ENGLAND

RANK	BRAND	SUB CATEGORY	OWNER	OVERALL RANK
1	GORDON'S GIN	GIN / GENEVER	DIAGEO	28
2	BEEFEATER	GIN / GENEVER	PERNOD RICARD	41
3	TANQUERAY	GIN / GENEVER	DIAGEO	52
4	BOMBAY	GIN / GENEVER	BACARDI MARTINI	57
5	THREE OLIVES	ENGLISH VODKA	PROXIMO SPIRITS	78
6	GORDON'S VODKA	VODKA	DIAGEO	87

RUSSIA

RANK	BRAND	SUB CATEGORY	OWNER	OVERALL RANK
1	SMIRNOFF VODKA	VODKA	DIAGEO	1
2	STOLICHNAYA	LATVIAN VODKA	SPI	37
3	RUSSIAN STANDARD	RUSSIAN VODKA	RUSSIAN STANDARD	54
4	ERISTOFF	GEORGIAN VODKA	BACARDI MARTINI	75

CUBA

RANK	BRAND	SUB CATEGORY	OWNER	OVERALL RANK
1	BACARDI	RUM / CANE	BACARDI MARTINI	3
2	HAVANA CLUB	RUM / CANE	PERNOD RICARD	23

MEXICO

RANK	BRAND	SUB CATEGORY	OWNER	OVERALL RANK
1	CUERVO	TEQUILA	DIAGEO	13
2	PATRON	TEQUILA	PATRON GROUP	29
3	SAUZA	TEQUILA	BEAM INC	42
4	KAHLUA	LIQUEURS	PERNOD RICARD	70
5	EL JIMADOR	TEQUILA	BROWN-FORMAN	94

IRELAND

RANK	BRAND	SUB CATEGORY	OWNER	OVERALL RANK
1	BAILEYS	LIQUEURS	DIAGEO	12
2	JAMESON	BLENDED IRISH WHISKEY	PERNOD RICARD	22

AUSTRALIA

RANK	BRAND	SUB CATEGORY	OWNER	OVERALL RANK
1	HARDYS	STILL LIGHT WINE	ACCOLADE WINES	34
2	YELLOWTAIL	STILL LIGHT WINE	CASELLA WINES	35
3	JACOBS CREEK	STILL LIGHT WINE	PERNOD RICARD	63
4	LINDEMANS	STILL LIGHT WINE	TREASURY WINE ESTATES	69
5	WOLF BLOSS	STILL LIGHT WINE	TREASURY WINE ESTATES	92

CANADA

RANK	BRAND	SUB CATEGORY	OWNER	OVERALL RANK
1	CROWN ROYAL	CANADIAN WHISKY	DIAGEO	21
2	BLACK VELVET	CANADIAN WHISKY	CONSTELLATION	62
3	CANADIAN CLUB	CANADIAN WHISKY	BEAM INC	64
4	CANADIAN MIST	CANADIAN WHISKY	BROWN-FORMAN	68
5	SEAGRAM V.O.	CANADIAN WHISKY	PERNOD RICARD	95

CHILE

RANK	BRAND	SUB CATEGORY	OWNER	OVERALL RANK
1	CONCHA Y TORO	STILL LIGHT WINE	CONCHA Y TORO	16

GERMANY

RANK	BRAND	SUB CATEGORY	OWNER	OVERALL RANK
1	JÄGERMEISTER	BITTERS / SPIRIT APERITIFS	MAST- JÄGERMEISTER	11
2	CHANTRE	OTHER BRANDY	ECKES STOCK	91
3	STOCK BITTERS	BITTERS / SPIRIT APERITIFS	ECKES STOCK	100

HOLLAND

RANK	BRAND	SUB CATEGORY	OWNER	OVERALL RANK
1	DE KUYPER	LIQUEURS	DE KUYPER / BEAM GLOBAL	26
2	KETEL ONE	VODKA	DIAGEO AND NOLET FAMILY	50
3	BOLS LIQUEURS	LIQUEURS	REMY COINTREAU	76

SPAIN

RANK	BRAND	SUB CATEGORY	OWNER	OVERALL RANK
1	FREIXENET	OTHER SPARKLING	FREIXENET	51
2	TORRES	STILL LIGHT WINE	TORRES FAMILY	82
3	WHISKY DYC	SPANISH WHISKY	BEAM INC	84
4	LARIOS	GIN / GENEVER	BEAM INC	97

FINLAND

RANK	BRAND	SUB CATEGORY	OWNER	OVERALL RANK
1	FINLANDIA	VODKA	BROWN-FORMAN	38

BRAZIL

RANK	BRAND	SUB CATEGORY	OWNER	OVERALL RANK
1	DREHER	OTHER BRANDY	CAMPARI	39

POLAND

RANK	BRAND	SUB CATEGORY	OWNER	OVERALL RANK
1	WYBOROWA	VODKA	PERNOD RICARD	74

VENEZUELA

RANK	BRAND	SUB CATEGORY	OWNER	OVERALL RANK
1	CACIQUE	RUM / CANE	DIAGEO	80

DOMINICAN REPUBLIC

RANK	BRAND	SUB CATEGORY	OWNER	OVERALL RANK
1	CAPTAIN MORGAN	RUM / CANE	DIAGEO	9

Rank	Rank change	Brand	Sub category	Owner	Country	Total score 2012	Total score difference	Brand score 2012	Brand score difference	Share of market	Future Growth	Premium Price Positioning	Market Scope	Awareness	Relevance	Heritage	Brand perception
1	0	Smirnoff Vodka	Vodka	Diageo	Russia	85.2%	-4%	71%	-4%	9.5	5.0	5.0	9.0	9.5	7.0	6.1	5.8
2	1	Johnnie Walker	Blended Scotch	Diageo	Scotland	73.9%	-4%	73%	-10%	8.0	6.0	6.0	9.0	8.0	8.0	6.6	7.0
3	-1	Bacardi	Rum / Cane	Bacardi Martini	Cuba	64.9%	-4%	66%	-13%	8.0	5.4	5.0	8.0	8.0	6.5	6.1	6.0
4	0	Martini Vermouth	Light Aperitif	Bacardi Martini	Italy	55.1%	1%	68%	0%	7.1	5.6	6.5	6.9	7.3	6.9	6.6	7.3
5	2	Hennessy	Cognac	LVMH	France	39.2%	1%	76%	-3%	8.4	6.0	7.1	7.9	8.0	7.8	7.8	8.1
6	-1	Absolut	Swedish Vodka	Pernod Ricard	Sweden	38.9%	0%	69%	-6%	7.0	5.6	5.9	7.0	8.0	8.0	7.0	7.0
7	-1	Jack Daniels	US Whiskey	Brown-Forman	USA	38.0%	-1%	76%	-5%	8.4	5.9	6.3	8.4	8.9	7.3	8.3	7.4
8	0	Chivas Regal	Blended Scotch	Pernod Ricard	Scotland	33.1%	2%	72%	-1%	7.0	6.0	7.0	8.0	7.5	7.0	8.0	7.0
9	0	Captain Morgan	Rum / Cane	Diageo	Dominican Republic	29.5%	0%	66%	-4%	7.0	6.3	5.3	7.0	7.0	7.0	6.0	7.0
10	0	Ballantines	Blended Scotch	Pernod Ricard	Scotland	24.3%	0%	58%	-6%	6.0	6.0	6.0	6.1	6.3	4.0	6.0	6.0
11	0	Jägermeister	Bitters / Spirit Aperitifs	Mast-Jägermeister	Germany	22.4%	-1%	66%	-4%	6.6	6.0	6.5	6.5	6.8	6.3	7.0	7.0
12	1	Baileys	Liqueurs	Diageo	Ireland	19.9%	0%	67%	-1%	8.0	5.0	4.4	8.0	9.0	7.0	5.8	6.5
13	-1	Cuervo	Tequila	Diageo	Mexico	19.7%	-1%	65%	-5%	6.5	5.0	6.1	7.0	6.7	6.3	7.1	7.0
14	2	Gallo	Still Light Wine	Gallo	USA	19.0%	-2%	62%	5%	7.6	5.5	4.8	6.8	7.0	5.8	6.5	5.5
15	4	Jim Beam	US Whiskey	Beam Inc	USA	18.1%	2%	62%	2%	6.0	6.0	5.5	5.9	6.3	5.6	7.6	6.6
16	2	Concha y Toro	Still Light Wine	Concha y Toro	Chile	17.7%	2%	67%	4%	8.4	5.5	6.3	7.0	7.0	6.0	6.0	7.6
17	-2	Moët et Chandon	Champagne	LVMH	France	17.2%	0%	70%	-7%	9.0	5.5	6.0	6.9	8.0	5.3	7.2	8.0
18	-4	Dewars	Blended Scotch	Bacardi Martini	Scotland	13.4%	-5%	42%	-11%	3.6	3.1	4.1	4.3	4.6	4.5	4.6	4.5
19	1	Grey Goose	French Vodka	Bacardi Martini	France	13.2%	-2%	55%	-12%	5.8	5.0	7.0	5.0	6.0	5.0	5.1	5.5
20	-3	Ricard	Aniseed	Pernod Ricard	France	12.8%	-4%	47%	-15%	4.8	3.8	4.6	3.9	4.5	4.5	7.0	4.8

21	0	Crown Royal	Canadian Whisky	Diageo	Canada	12.6%	-1%	52%	8%	5.3	4.1	5.1	5.0	5.3	5.6	5.4	5.8
22	0	Jameson	Blended Irish Whiskey	Pernod Ricard	Ireland	12.4%	0%	57%	-13%	6.0	5.4	5.8	5.0	6.0	6.0	5.1	6.5
23	5	Havana Club	Rum / Cane	Pernod Ricard	Cuba	12.4%	1%	64%	-1%	4.5	6.0	5.0	7.0	7.0	6.0	8.0	8.0
24	3	J & B	Blended Scotch	Diageo	Scotland	12.3%	0%	60%	5%	5.8	5.1	5.5	6.4	7.0	5.9	6.5	6.1
25	-2	Grants Scotch	Blended Scotch	William Grant & Sons	Scotland	12.2%	0%	49%	-1%	3.8	4.3	4.8	4.6	4.4	5.5	6.0	5.8
26	-2	De Kuyper	Liqueurs	De Kuyper and Beam Inc	Holland	11.9%	1%	48%	-5%	4.8	4.0	4.5	5.3	4.9	4.6	5.6	5.1
27	-1	Veuve Clicquot	Champagne	LVMH	France	11.7%	1%	64%	-7%	6.0	6.0	7.0	6.0	6.0	6.0	7.0	7.0
28	-3	Gordon's Gin	Gin / Genever	Diageo	England	11.7%	-1%	54%	-3%	5.8	4.0	5.4	5.8	5.9	5.1	5.6	6.0
29	1	Patron	Tequila	Patron Group	Mexico	10.4%	0%	55%	-4%	5.8	4.4	5.5	5.0	5.8	5.6	5.4	6.3
30	2	Robert Mondavi	Still Light Wine	Constellation	USA	10.3%	-17%	64%	-3%	6.0	5.0	6.0	6.6	6.9	6.9	6.3	7.3
31	-2	Svedka	Swedish Vodka	Constellation	Sweden	10.1%	-1%	55%	-8%	5.4	5.6	4.8	5.1	5.9	6.0	5.3	6.0
32	4	Skyy	US Vodka	Campari	USA	10.0%	-1%	58%	-1%	5.6	4.5	5.4	6.6	7.0	6.0	5.0	6.4
33	-2	Martell	Cognac	Pernod Ricard	France	9.5%	-1%	53%	-12%	4.8	4.8	5.1	4.9	5.4	4.9	6.5	5.9
34	5	Hardys	Still Light Wine	Accolade Wines	USA	9.1%	1%	60%	5%	5.8	5.1	5.2	6.9	7.0	5.9	6.4	5.4
35	2	Yellowtail	Still Light Wine	Casella Wines	Australia	9.1%	1%	53%	4%	5.6	4.4	5.3	5.8	6.0	5.0	4.0	6.1
36	-3	Malibu	Liqueurs	Pernod Ricard	USA	9.0%	-1%	51%	-7%	6.4	4.4	4.4	4.5	5.4	5.4	4.9	5.6
37	-2	Stolichnaya	Latvian Vodka	SPI	Russia	8.8%	-1%	50%	-7%	4.9	4.9	5.0	4.8	4.9	5.0	5.4	5.4
38	0	Finlandia	Finish Vodka	Brown-Forman	Finland	8.7%	1%	60%	6%	5.8	4.8	5.5	6.3	6.8	6.3	6.0	6.6
39	8	Dreher	Other Brandy	Campari	Brazil	8.6%	2%	53%	17%	5.0	5.6	5.1	5.0	5.0	5.3	6.6	5.0
40	8	E & J Brandy	Other Brandy	Gallo	USA	8.1%	2%	53%	12%	5.4	5.4	5.3	5.0	4.9	5.6	5.1	5.4
41	2	Beefeater	Gin / Genever	Pernod Ricard	England	8.1%	1%	68%	7%	7.0	5.0	6.0	7.0	7.5	7.0	7.3	7.4
42	-8	Sauza	Tequila	Beam Inc	Mexico	8.0%	-2%	53%	-7%	5.0	4.6	4.4	6.0	6.0	4.8	6.0	6.0

43	-3	Famous Grouse	Blended Scotch	Edrington Group	Scotland	7.7%	0%	55%	-3%	4.5	4.5	5.1	5.3	5.9	5.8	6.5	6.3
44	-2	Fernet-Branca	Bitters / Spirit Aperitifs	Frantelli Branca	Italy	7.6%	0%	46%	1%	2.8	3.3	5.3	4.6	4.9	5.1	5.4	5.8
45	9	Seagram's 7 Crown	US Whiskey	Diageo	USA	7.4%	1%	59%	18%	6.5	5.0	5.3	5.0	6.6	5.8	6.5	6.4
46	9	Bell's	Blended Scotch	Diageo	Scotland	6.9%	1%	55%	8%	4.9	6.5	6.0	5.5	4.9	6.0	5.3	5.2
47	5	Seagram Gin	Gin / Genever	Pernod Ricard	USA	6.9%	1%	50%	9%	5.1	4.5	4.5	4.8	5.3	5.5	4.9	5.1
48	20	Aperol	Light Aperitif	Campari	Italy	6.7%	4%	53%	10%	5.0	7.0	5.0	5.0	5.0	5.0	0.0	5.0
49	-3	Southern Comfort	Liqueurs	Brown-Forman	USA	6.7%	0%	62%	2%	4.9	5.1	7.0	6.1	6.5	6.5	6.4	7.0
50	0	Ketel One	Dutch Vodka	Diageo and Nolet family	Holland	6.5%	0%	55%	1%	4.5	4.9	6.0	4.8	5.9	5.5	6.9	6.0
51	0	Freixenet	Other Sparkling	Freixenet	Spain	6.4%	0%	57%	2%	6.8	5.0	5.0	5.0	5.0	6.0	6.0	7.0
52	-7	Tanqueray	Gin / Genever	Diageo	England	6.3%	-1%	54%	-6%	4.9	4.5	5.4	5.4	5.6	5.4	5.6	6.1
53	-4	Beringer	Still Light Wine	Treasury Wine Estates	USA	6.0%	0%	48%	-3%	4.8	4.4	5.3	5.5	4.0	4.0	5.0	5.9
54	-10	Russian Standard	Russian Vodka	Russian Standard	Russia	6.0%	-1%	48%	-7%	3.1	5.0	6.0	6.0	4.6	4.0	4.8	5.0
55	16	William Lawson's	Blended Scotch	Bacardi Martini	Scotland	6.0%	2%	52%	9%	5.4	6.0	4.6	5.0	5.0	5.0	5.5	5.0
56	11	Cinzano Vermouth	Light Aperitif	Campari	Italy	5.9%	2%	62%	14%	5.8	5.3	6.6	6.1	6.9	6.1	6.8	6.3
57	-16	Bombay Sapphire	Gin / Genever	Bacardi Martini	England	5.9%	-1%	51%	-15%	3.5	4.3	6.4	4.9	5.4	4.9	5.9	5.9
58	4	Maker's Mark	US Whiskey	Beam Inc	USA	5.9%	1%	66%	3%	6.0	5.9	6.6	6.3	7.0	7.3	7.0	7.1
59	-6	Remy Martin	Cognac	Remy Cointreau	France	5.8%	0%	54%	-6%	2.9	4.0	6.6	5.3	5.5	5.3	6.5	7.0
60	3	Teacher's	Blended Scotch	Beam Inc	Scotland	5.8%	1%	57%	6%	5.0	7.0	5.0	6.0	6.0	5.0	6.0	5.5
61	3	Campari Bitters	Bitters / Spirit Aperitifs	Campari	Italy	5.8%	1%	43%	-16%	3.6	3.4	4.1	4.5	4.3	4.8	4.9	4.8
62	4	Black Velvet	Canadian Whisky	Constellation	Canada	5.7%	1%	55%	13%	4.5	4.9	5.8	5.8	5.6	6.1	5.5	5.9
63	-6	Jacobs Creek	Still Light Wine	Pernod Ricard	Australia	5.7%	0%	56%	4%	4.8	4.0	5.0	6.6	7.3	5.5	6.0	5.5

64	-5	Canadian Club	Canadian Whisky	Beam Inc	Canada	5.5%	0%	57%	2%	4.8	5.0	5.4	5.4	6.3	5.5	7.0	6.4
65	-5	Blossom Hill	Still Light Wine	Diageo	USA	5.5%	1%	58%	5%	5.4	4.8	6.1	5.9	5.8	5.8	6.6	6.0
66	13	Cutty Sark	Blended Scotch	The Edrington Group	Scotland	5.1%	2%	71%	21%	6.5	6.1	7.4	7.1	7.4	7.0	8.0	7.6
67	-11	Sutter Home	Still Light Wine	Sutter Home Winery	USA	5.0%	-1%	41%	-6%	5.8	4.0	4.0	4.0	4.0	3.0	4.0	4.0
68	5	Canadian Mist	Canadian Whisky	Brown-Forman	Canada	4.9%	1%	58%	20%	7.1	4.8	4.9	5.8	6.0	5.9	6.1	5.8
69	-11	Lindemans	Still Light Wine	Treasury Wine Estates	Australia	4.9%	0%	50%	-2%	6.0	3.9	4.5	6.0	5.0	4.4	5.4	5.0
70	-9	Kahlua	Liqueurs	Pernod Ricard	Mexico	4.9%	0%	57%	2%	5.6	4.4	5.8	5.8	6.1	5.3	6.9	5.8
71	-1	Courvoisier	Cognac	Beam Inc	France	4.8%	1%	58%	0%	5.3	5.3	5.9	5.8	5.6	5.8	6.4	6.3
72	3	100 Pipers	Blended Scotch	Pernod Ricard	Scotland	4.5%	1%	53%	15%	6.0	4.6	4.6	5.3	5.0	5.9	5.5	5.3
73	-1	Clan Campbell	Blended Scotch	Pernod Ricard	Scotland	4.3%	1%	48%	8%	3.5	4.3	4.9	4.6	4.9	5.1	5.6	5.8
74	-5	Wyborowa	Polish Vodka	Pernod Ricard	Poland	4.3%	0%	51%	7%	3.9	4.0	5.4	4.9	5.6	5.3	6.0	5.6
75	3	Eristoff	Georgian Vodka	Bacardi Martini	Russia	4.2%	1%	54%	12%	5.5	3.6	5.3	4.9	5.9	5.6	6.3	5.9
76	1	Bols Liqueurs	Liqueurs	ABN Amro Capital and Management	Holland	4.1%	1%	55%	10%	4.6	4.5	5.6	5.4	5.8	5.4	6.9	6.1
77	-12	Glenfiddich	Malt Scotch	William Grant & Sons	Scotland	3.9%	-1%	53%	-11%	3.4	4.3	5.8	5.1	5.0	5.1	7.3	6.1
78	9	Three Olives	English Vodka	Proximo Spirits	England	3.9%	1%	55%	15%	4.6	4.2	5.5	5.5	6.0	5.1	7.1	6.1
79	13	Ramazotti Amari	Bitters / Spirit Aperitifs	Pernod Ricard	Italy	3.6%	1%	56%	14%	4.5	5.0	6.5	5.8	5.3	6.0	5.8	6.0
80	-4	Cacique	Rum / Cane	Diageo	Venezuela	3.5%	0%	41%	2%	4.0	4.0	4.4	3.6	3.6	4.1	4.9	4.3
81	10	Cointreau	Liqueurs	Remy Cointreau	France	3.5%	1%	66%	14%	5.8	6.0	6.6	7.0	6.9	6.3	7.1	7.0
82	-8	Torres	Still Light Wine	Torres Family	Spain	3.4%	0%	56%	0%	4.5	5.5	5.0	6.1	6.0	6.0	6.0	6.0
83	17	Wild Turkey	US Whiskey	Campari	USA	3.3%	1%	60%	7%	5.1	5.0	6.0	6.1	6.6	5.8	7.0	6.4
84	25	Whisky DYC	Spanish whisky	Beam Inc	Spain	3.3%	0%	56%	0%	5.8	5.0	5.4	5.3	5.6	5.8	6.0	6.1

85	9	Inglenook	Still Light Wine	The Wine Group	USA	3.2%	1%	53%	14%	5.3	5.4	5.1	5.0	5.5	4.9	5.5	5.4
86	2	Martini Sparkling Wine	Other Sparkling	Bacardi Martini	Italy	3.2%	1%	60%	10%	4.9	5.6	5.6	5.8	6.4	6.1	7.0	6.3
87	14	Gordon's Vodka	Vodka	Diageo	England	3.1%	0%	48%	0%	3.1	4.9	5.3	5.0	4.3	4.8	5.6	5.4
88	19	Nicolas Feuillatte	Champagne	CV-CNF	France	3.0%	0%	58%	0%	5.1	5.5	5.9	5.5	5.5	5.8	6.8	6.3
89	-6	Paul Masson	Other Brandy	Constellation	USA	3.0%	0%	55%	13%	4.8	4.6	5.1	5.6	6.1	5.8	6.0	5.6
90	-9	Kendall Jackson	Still Light Wine	Jackson Family Wines	USA	3.0%	0%	52%	0%	4.0	4.6	5.4	4.5	5.6	5.3	6.4	5.8
91	26	Chantre	Other Brandy	Eckes Stock	Germany	2.9%	0%	58%	0%	4.9	5.3	6.3	6.0	5.9	5.9	6.4	6.3
92	-2	Wolf Blass	Still Light Wine	Treasury Wine Estates	Australia	2.9%	0%	60%	6%	6.4	5.3	5.5	6.0	6.8	5.8	6.1	6.3
93	-8	G. H. MUMM	Champagne	Pernod Ricard	France	2.9%	0%	54%	-3%	4.6	4.5	4.8	5.5	6.1	5.3	6.4	6.1
94	-1	El Jimador	Tequila	Brown-Forman	Mexico	2.8%	0%	47%	2%	3.4	4.4	5.3	4.3	4.3	4.6	6.1	5.0
95	8	Seagram V.O.	Canadian Whisky	Pernod Ricard	Canada	2.7%		50%		3.4	5.1	4.9	5.5	4.6	5.0	5.8	5.6
96	-10	Laurent Perrier	Champagne	Bernard de Nonancourt	France	2.7%	0%	45%	-5%	4.6	4.1	4.5	4.3	4.6	4.0	5.5	4.8
97	1	Larios	Gin / Genever	Beam Inc	Spain	2.7%	0%	49%	7%	4.0	4.5	4.0	3.6	6.0	6.0	5.6	5.5
98	6	Pinnacle	French Vodka	White Rock Distilleries	France	2.7%		45%		3.6	4.5	4.3	4.0	4.3	4.5	5.6	5.0
99	-15	Disaronno	Liqueurs	Ilva Saronno	Italy	2.7%	0%	53%	-5%	4.4	4.9	5.1	5.8	5.0	5.4	6.3	5.9
100	8	Stock Bitters	Bitters / Spirit Aperitifs	Eckes Stock	Germany	2.5%	0%	47%	0%	3.1	3.9	4.5	5.0	5.0	5.0	6.0	5.0