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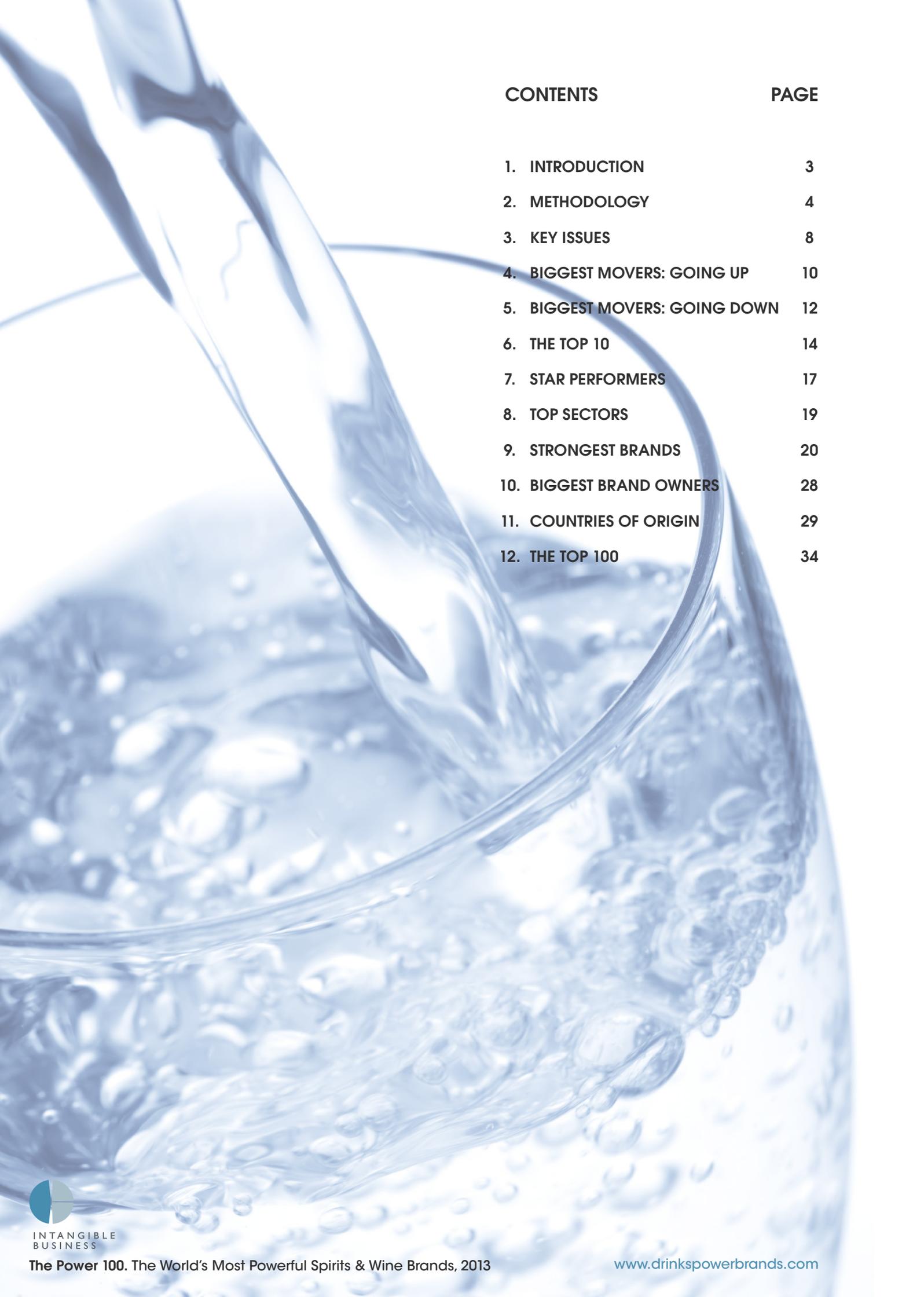
THE POWER 100 THE WORLD'S MOST POWERFUL SPIRITS & WINE BRANDS, 2013



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The Power 100. The World's Most Powerful Spirits & Wine Brands, 2013

www.drinkpowerbrands.com



CONTENTS	PAGE
1. INTRODUCTION	3
2. METHODOLOGY	4
3. KEY ISSUES	8
4. BIGGEST MOVERS: GOING UP	10
5. BIGGEST MOVERS: GOING DOWN	12
6. THE TOP 10	14
7. STAR PERFORMERS	17
8. TOP SECTORS	19
9. STRONGEST BRANDS	20
10. BIGGEST BRAND OWNERS	28
11. COUNTRIES OF ORIGIN	29
12. THE TOP 100	34

INTRODUCTION

Whilst the far eastern markets enjoy their newfound wealth - and brand owners benefit from their spending power and desire for premium brands - stagnant conditions in Japan and the stunted European market conversely cause problems. The brands that have performed best this year have managed to capitalise on the developing economic markets, which has certainly been the case for Diageo's star Johnnie Walker. The buoyant US market, whilst being over-saturated with Vodka brands, has also led growth - particularly in the Irish Whisky category.

There have been some interesting rivalries within the top 10 this year, with Johnnie Walker knocking Smirnoff off the top spot to become the first Blended Scotch to claim 1st place; Jack Daniel's has overtaken ABSOLUT to take 6th place and Captain Morgan has leapfrogged Chivas Regal to claim 8th position. There has also been some real movement outside the top 10, as market conditions make strategic brand decisions evermore paramount to success. This is further apparent when we consider that there are 8 new entrants this year, compared to just 2 in 2011.

Scotch Whisky continues its reign as the most powerful category, as renewed interest from the US market and strong sales in the Far East bolster growth. The Rum category has also overtaken the flavoured spirits category with Brugal's inclusion, and strong performances from the entire category indicating the world has a revived interest in Rum. The Champagne category has also made somewhat of a comeback this year through strategic value-offerings in the US market.

By country, Scotland came out on top again this year, with 16 power brands accumulating a total score of 226% - this is hardly surprising when we consider the enviable brand equity of Scotch Whisky brands including the likes of Johnnie Walker, Chivas Regal, Ballantine's, J&B, Teacher's, Glenfiddich - and the list goes on.

It's an exciting time for drinks brands, with new market opportunities as the east opens its doors to established western brands. We are also hoping to see an eastern brand make it into the Power 100 soon - interesting times are ahead.



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
- Brand growth: projected growth based on 10 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 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.



THE 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 with Intangible Business.



DONARD GAYNOR, *Senior Vice President Corporate Development Beam Global Spirits & Wine*

Donard is responsible for the company's industry relations and advancing the company's growth strategy by building strategic commercial business partnerships. Donard 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, Donard 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. Donard also helped to lead the sale of Seagram's global business to Diageo and Pernod-Ricard. Prior to his spirits and wine experience, Donard 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.



KEY ISSUES

It has been a record breaking year for Diageo, who have really broken away from their main competitors with a sublime performance, particularly from Johnnie Walker and Smirnoff who secured the top spots once again. These two brands alone contribute a staggering 42.4 million cases to Diageo's volumes, overshadowing its main rivals.

Pernod Ricard's total score has slipped 15% this year, although the group still boasts the greatest number of Power Brands, at 18, and share a total score of 1009%. Overall it has been a positive year for the group, who have documented record volumes for ABSOLUT, Chivas Regal, Beefeater and The Glenlivet, which has helped Pernod maintain arm's length from the next biggest owner Bacardi Martini. However, as Pernod's total score drops and Diageo's increases by 7%, the gap between the top 2 groups is growing.

3rd biggest brand owner Bacardi Martini have really strengthened their portfolio this year, growing all their brands bar 1. The panel were impressed with their efforts, increasing their brand score by 28%. Brand-by-brand there are some extremely impressive performances by Bombay Sapphire and Eristoff, but even their volume movements simply cannot compete with Diageo's top Vodka and Blended Scotch. Nevertheless, Bacardi have the momentum to challenge Pernod's position at the number 2 spot if they continue this form.

Another impressive performance is that of The Erdington Group, who have shot up 10 places in the brand owner rankings as Brugal's global presence is included in the Power 100 for the first time - coming in at an impressive 37th. The Macallan jumped 13 places to make it in at 90 in the rankings, alongside a solid performance from the Famous Grouse. The group are capitalising on their Asian offices' understanding of the Eastern market, to grow their brands in this region.

The emerging markets, particularly the increasing Chinese middle class, have become key growth markets for our brand owners, as aspirational regions develop a taste for premium branded alcohol. This has propelled the Brandy, Blended Scotch and Whiskey categories, as well as the Rum category, where Eastern European markets have further driven demand. Cognac has also emerged as a favourite in China, in conjunction with growing US demand, which LVMH's Hennessy has certainly leveraged.



LVMH has put in a strong performance this year, as they retain 4th place in the brand owner rankings with a brand score of 287% - up 28% on last year. Market conditions are favourable for the group as there is a resurgence of demand for premium priced Champagne, explaining the mammoth rank jump of 36 places by Dom Pérignon. The group implemented value-creation strategies and innovation for growth in mature markets, whilst also performing well in developing markets, where newfound spending power and upmarket Champagne go hand in hand.

Elsewhere, the saturation of the US Vodka market has resulted in a fiercely competitive market, particularly in terms of price - making it difficult for brands to retain price premium. Whilst Smirnoff steals the show, Pinnacle, CÎROC and Erisoff have reported impressive year on year (yoy) growth, demonstrating that it is possible to stand out from the crowd of well-established brands.

The Campari Group have also had an excellent year for growth, with some impressive volume increases across their portfolio, in particular Cinzano Vermouth and Wild Turkey. Campari are committed to diversifying their brands and extending into overseas markets. Their 2012 acquisition of Lascelles de Mercado & Co., including the Jamaican Appleton Rum brand, demonstrates their developmental mind-set. We hope to see more of them in the Power 100 next year.

Such large success stories in the drinks industry inevitably lead to misfortune for others, as Beam's Whiskey, Brandy and Tequila brands slip in the rankings and total scores. Whisky NYC has slipped out of the rankings, contributing to Beam Inc.'s 6% loss in total score this year. However this is relative to the accomplishments of other brand owners, as the volumes for all Beam's brands in the Power 100 have actually increased with a stand-out performance from Pinnacle Vodka, allowing them to retain the number 6 spot in brand owner rankings. The competition has been tough this year due to vast differences in global market conditions. Mature markets continue to struggle, juxtaposed by flourishing developing eastern economies. This creates a volatile global environment for brand owners and opens up opportunities for diversification and change in the drinks industry.

NEW ENTRANTS

BRAND	RANK
PIPER HEIDSIECK	98
GRAND MARNIER	97
THE MACALLAN	90
THE GLENLIVET	76
BUCHANANS	75
DOM PERIGNON	70
CIROC	40
BRUGAL	37



THE BIGGEST MOVERS GOING UP



PINNACLE +49 PLACES

Pinnacle has shot up the rankings an impressive 49 places, boosted by a 9% yoy volume growth. The Vodka has gone from strength to strength for several years, demonstrating fast growth in a competitive market. Beam has been managing the brand since June 2012 after acquiring it from White Rock Distillers. The brand is very popular with young people in the US.



DOM PÉRIGNON +36 PLACES

Having just missed out in 2012 ranking 106, an 11% increase in brand score has propelled the prestigious Dom Pérignon brand into the 2013 Power 100 – jumping up 36 places in the ranks. The leap comes as a result of renewed interest in super premium Champagne.



THE GLENLIVET +34 PLACES

A noteworthy 15% increase in brand score has seen The Glenlivet move 34 places up the ranks, after coming in at rank 110 in 2012. The brand has grown consistently for several years as Pernod Ricard develop the respected high-quality Malt Scotch.



RÉMY MARTIN +23 PLACES

This French brand has moved up 23 places. Rémy Martin's volume is up 11% on last year, fuelled by high demand from the growing Chinese market that has continued their taste for Cognac.



SUTTER HOME +23 PLACES

Another year of strong growth sees Sutter Home shoot up 23 places. The panel were impressed with the wine's awareness and market share, giving the brand a 9% increase on its brand score this year to complement its 3% volume movement.



LINDEMANS +19 PLACES

After falling 11 places last year, Treasury Wine Estate's Lindemans has made a come-back, as high market share and awareness drive their 4% volume growth.



DISARONNO +18 PLACES

This classic Liqueur has made it into the biggest movers for the third year running, with a combined rank climb of 44 places since 2010. They have captured the top-end of the young person's segment with a marketing drive which promotes it in cocktails such as Amaretto Sours.



BOMBAY SAPHIRE

BOMBAY SAPHIRE +14 PLACES

Bombay Sapphire has outperformed rivals in terms of growth, boasting a 16% brand score increase, bolstered by impressive volume movements as it steals market share from its competitors in the Gin category.

G.H.MUMM

MUMM +14 PLACES

Another impressive movement in the Champagne category, Pernod Ricard's Mumm has lifted 14 places, boosted by 7% yoy growth and a 7% brand score difference from 2012. Mumm is starting to show its potential.



EL JIMADOR +14 PLACES

As rival Jose Cuervo has seen its volumes shrink, el Jimador storms ahead with 7% yoy growth. The panel were particularly impressed with the brands heritage.

BIGGEST RISERS

BY TOTAL SCORE	
BRAND	CHANGE
JOHNNIE WALKER	17%
BACARDI	5%
DEWARS	5%
PINNACLE	3%
JAMESON	3%
RÉMY MARTIN	3%
SUTTER HOME	3%
CAPTAIN MORGAN	2%
DOM PÉRIGNON	2%
BOMBAY SAPHIRE	2%

BY BRAND SCORE	
BRAND	CHANGE
BOMBAY SAPHIRE	16%
THE GLENLIVET	15%
DEWARS	15%
BACARDI	13%
MARTELL	13%
LAURENT-PERRIER	12%
JAMESON	12%
DOM PÉRIGNON	11%
RÉMY MARTIN	11%
JOHNNIE WALKER	11%

BY RANK	
BRAND	CHANGE
PINNACLE	49
DOM PÉRIGNON	36
THE GLENLIVET	34
RÉMY MARTIN	23
SUTTER HOME	23
LINDEMANS	19
DISARONNO	18
BOMBAY SAPHIRE	14
MUMM	14
EL JIMADOR	14



THE BIGGEST MOVERS GOING DOWN



SEAGRAM'S 7 CROWN, -26 PLACES

A modest volume decline of 1% and brand score of 3% has seen Seagram's 7 Crown Whisky cascade down the ranks – Diageo's focus may have been diverted by other brands in its portfolio, which is evident from the huge volume increases elsewhere for the group.



BOLS LIQUEURS, -19 PLACES

Bols Liqueurs has dropped 19 places this year despite a 6% volume movement. This is largely due to the panel marking the brand down on the share of market and future growth potential, giving it a brand score difference of -10% on last year.



CANADIAN MIST, -19 PLACES

For 9 consecutive years Brown Forman's Canadian Whisky brand has suffered volume decline. The panellists' confidence in the future growth, market scope and share of market has consequently waned, despite the brand's heritage.



CLAN CAMPBELL, -18 PLACES

Clan Campbell has seen another consecutive year of volumes decline since the Blended Whisky peaked in 2009. The brand ranks last in the Whisky brands in the Power 100 and faces stiff competition in a crowded marketplace.



RAMAZOTTI AMARO, -17 PLACES

Ramazotti Amaro had stagnant growth this year and a brand score decrease of 13%, contributing to its 17 place dip in the rankings.



E & J BRANDY, -16 PLACES

Gallo's Brandy sunk 16 places this year due to a small 1% volume decline and a larger brand score decrease of 14%. The panellists discounted the brand on market scope and future growth potential – E&J are losing market share to their competitors, some of whom are displaying large growth of 11% plus.





INGLENOOK, -15 PLACES

Despite a volume increase of 5%, Inglenook has made it into the biggest fallers with a 15 place drop in the ranks. This is due to a -5% brand score on last year as the panel cast doubt on its premium price positioning and future growth compared to other brands.

CONCHA Y TORO

CONCHA Y TORO, -13 PLACES

Relative to other power brands, Concha y Toro has not fared so well, falling 13 places. The panel scored it poorly on future growth, contributing to its brand score decline of 10% since 2012.

CAMPARI

CAMPARI BITTERS, -13 PLACES

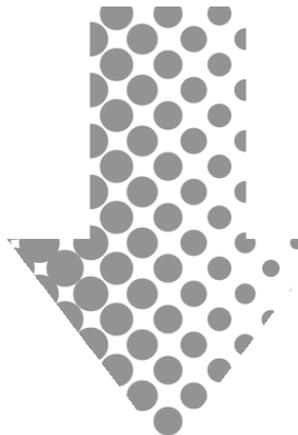
Campari Bitters is another faller in the flavoured spirits category, despite growing volumes by 3% and a brand score increase of 6%. This result is rooted more in other brands strong performances than Campari Bitters losing momentum.

BIGGEST FALLERS

BY TOTAL SCORE	
BRAND	CHANGE
MARTINI	-17%
JOSE CUERVO	-8%
CONCHA Y TORO	-8%
GALLO	-7%
ABSOLUT	-4%
SEAGRAM'S 7 CROWN	-3%
MOËT ET CHANDON	-3%
E & J BRANDY	-3%
JÄGERMEISTER	-2%
DE KUYPER	-2%

BY BRAND SCORE	
BRAND	CHANGE
CANADIAN MIST	-17%
SEAGRAM'S 7 CROWN	-16%
CINZANO VERMOUTH	-16%
E & J BRANDY	-14%
RAMAZZOTTI AMARO	-13%
WILD TURKEY	-12%
COINTREAU	-12%
100 PIPERS	-11%
BLACK VELVET	-11%
DREHER	-10%

BY RANK	
BRAND	CHANGE
SEAGRAM'S 7 CROWN	-26
CANADIAN MIST	-19
BOLS LIQUEURS	-19
CLAN CAMPBELL	-18
RAMAZZOTTI AMARO	-17
E & J BRANDY	-16
CONCHA Y TORO	-13
CAMPARI BITTERS	-13
SAUZA	-12
BELL'S	-12



THE TOP 10



1 JOHNNIE WALKER

Johnnie Walker has knocked Smirnoff off the top spot in a staggering performance by Diageo, showcasing how to manage megabrands. Diageo reported an impressive 15% net sales and 7 % volume movement for the Johnnie Walker brand - which has wide appeal due to a variety of offerings, from the top end Blue Label to the accessible Red Label and iconic Black Label brand variants. The panel gave Johnnie Walker an 11% brand score increase on last year, and have confidence in its continued growth. The key issue Diageo faces is maturing stock for their Black 12 year plus blend - Diageo are rising to the challenge, making a \$1 billion investment in maturation of Whisky in Scotland - 'the largest investment of its kind ever made.' Expect to see more great things next year.



2 SMIRNOFF

After losing ground in the last few years and being forced to discount to retain its volumes, Smirnoff has bounced back and grown its volumes by 5% to 26 million cases- vastly closing in on record 2008 volumes. Its brand score increased by 2% this year as the panel's confidence in the brand has improved - but it was not enough to retain leadership over Johnnie Walker, as the panel marked the brand down in terms of premium price positioning and future growth, compared to the king of Scotch. Yet Smirnoff do have the muscle in the saturated US Vodka market, where its status as a local brand gives it an edge over imported competitors. Diageo have set the bar very high this year.



3 BACARDI

It's been an extremely successful year for the Rum brand with large volume movements and a brand score increase of 13%. Although this cannot compete with Diageo's megabrands' real volume movements, this reflects a superb year for the top 2 rather than reflecting on Bacardi's strength in the market. Bacardi is viewed as a bar staple and has been focussing marketing efforts on the Rum's versatility when it comes to cocktails.



THE TOP 10



MARTINI

Italian Martini has grown this year and retained 4th position, with volumes almost double that of competitors Jägermeister and Cinzano Vermouth. Despite a 7% volume increase the panel gave the brand a 3% lower brand score of 65.3%, comparatively marking the light aperitif down on future growth. Martini's volumes will undoubtedly be propelled by a global rise in demand for 'chic' cocktails in line with growing wealth aspirations, and the brand's great heritage, allowing it to retain its price premium.



HENNESSY

Hennessy retains 5th place, as it grows in line with the dynamic Cognac market, fuelled by growth in China and the US. Hennessy made an impressive jump from 7th to 5th place last year, and has proved it can hold its own as it continues to target the expanding far eastern middle classes. With this market continuing to grow, the panel have confidence in the future growth potential of the brand, which has once again outperformed competitors in terms of both growth and image – volume up 6% on the previous year.



JACK DANIEL'S

In the other great story of this year's Power 100, Jack Daniel's has overtaken ABSOLUT in the rankings to claim 6th place. Jack Daniel's has more momentum in more markets than ABSOLUT which is reflected in its growth with volumes moving 7% compared to ABSOLUT's 2%. As the only Whisky brand to make the top 10, it deserves the hard-fought position as the leader in its category. The brand has focussed marketing efforts on the younger audience and has a strong brand perception built on its heritage, whilst maintaining its status as a bar staple and cocktail ingredient. Brown Forman's efforts could be overshadowed by Diageo – but this is a really noteworthy performance that should not be undervalued.



THE TOP 10

ABSOLUT
Country of Sweden
VODKA

7

ABSOLUT

ABSOLUT has seen modest volume increases of 2% this year, and has slipped a place in the rankings as other brands outperform it in terms of growth. The Swedish brand has continued to perform well in a competitive Vodka market through innovative advertising campaigns such as 'ABSOLUT unique' and its marketing to young professionals. ABSOLUT's total score slipped by 4% this year, as they have been forced to discount their prices in the flooded US market.

8

CAPTAIN MORGAN

Captain Morgan has overtaken Chivas Regal, with the Rum now claiming 8th place. Another great success for Diageo, who have grown volumes 9% this year. The panel were impressed – scoring the brand 6% higher on brand score, giving it 71.8%. The launch of Captain Morgan Black Spiced Rum in North America and increase in marketing spend has resonated with the male audience, adding to its success.



9

CHIVAS REGAL

This Blended Scotch has slipped a place in the rankings. Whilst it is respected in the Asian markets it has stood still with negligible volume movements whilst Johnnie Walker powers ahead. The brand is established in more mature markets with less movement in them such as Japan. The market here has been stagnant for some time and there is a large propensity to save rather than spend. Despite these market conditions, the total score of 30.8% shows that the brand still has real strength.



10

BALLANTINE'S

Ballantine's has once again retained its position in the top 10, as it overpowers its major competitor J&B in the European market, under Pernod Ricard's management. The Blended Scotch has not grown much in way of volumes, reaching a plateau - largely due to its reliance on the falling European market and stagnant Japanese market. The challenge the Blended Scotch faces is growing its volumes in tough market conditions – it is only retaining its volumes due to momentum in the Far East markets, which has developed a deep connection with Ballantine's 17 year old powered by the South Korean and Japanese markets.

Ballantine's



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STAR PERFORMERS

Each year, Intangible Business recognises those brands which warrant particular attention. Not necessarily the biggest. Not necessarily the best. Just the brands which have performed especially well.

This year the Star Performance Award goes to four brands which have performed exceptionally well, increasing their total scores and their brand scores to rise further up the rankings, outdoing the competition.

We congratulate these brands and the people who have managed them throughout this challenging period and look forward to charting their continued growth and progress in future years.



Johnnie Walker.

CÎROC
ULTRA PREMIUM VODKA



RÉMY MARTIN
FINE CHAMPAGNE COGNAC





THE MOST INFLUENTIAL DRINKS INDUSTRY RANKING



8 TOP SECTORS

MOST POWERFUL SECTORS

RANK	CHANGE	SECTOR	TOTAL SCORE	TOTAL BRAND SCORE	BRANDS IN TOP 100
1	-	WHISKY	330.5%	1438.3%	25
2	-	VODKA	193.4%	697.9%	13
3	1	RUM/CANE	124.2%	311.2%	5
4	-1	FLAVOURED SPIRITS	107.3%	789.6%	15
5	-	STILL LIGHT WINE	87.8%	756.4%	13
6	-	BRANDY	73.0%	341.9%	6
7	-	LIGHT APERITIF	48.0%	164.0%	3
8	-	SPARKLING	47.1%	551.2%	9
9	-	GIN / GENEVER	31.4%	238.0%	4
10	-	TEQUILA	18.0%	167.5%	5



STRONGEST BRANDS

RANK	BRAND	BRAND SCORE 2011	CHANGE
1	JOHNNIE WALKER	84%	8%
1	BACARDI	79%	13%
3	HENNESSY	75%	-1%
4	MOËT ET CHANDON	74%	4%
5	SMIRNOFF	73%	2%
5	CAPTAIN MORGAN	72%	6%
7	CHIVAS REGAL	71%	-1%
8	VEUVE CLICQUOT	71%	7%
9	ABSOLUT	70%	1%
9	JACK DANIEL'S	69%	-7%



MOST POWERFUL WHISKY BRANDS

RANK	BRAND	OVERALL RANK	TOTAL SCORE 2011	CHANGE	BRAND SCORE 2011	CHANGE
1	JOHNNIE WALKER	1	90.7%	16.8%	83.57%	10.57%
2	JACK DANIEL'S	6	36.0%	-2.0%	68.93%	-7.07%
3	CHIVAS REGAL	9	30.8%	-2.3%	70.63%	-1.37%
4	BALLANTINE'S	10	22.5%	-1.8%	61.88%	3.88%
5	DEWARS	12	18.2%	4.8%	56.79%	14.79%
6	JIM BEAM	14	16.9%	-1.2%	61.07%	-0.93%
7	JAMESON	15	15.1%	2.7%	68.57%	11.57%
8	CROWN ROYAL	19	12.2%	-0.4%	56.96%	4.96%
9	GRANT'S SCOTCH	21	11.3%	-0.9%	51.96%	2.96%
10	J & B	27	10.3%	-2.0%	54.82%	-5.18%
11	FAMOUS GROUSE	45	7.1%	-0.6%	53.57%	-1.43%
12	WILLIAM LAWSON'S	57	5.2%	-0.8%	45.18%	-6.82%
12	BELL'S	58	5.2%	-1.7%	50.63%	-4.38%
12	MAKER'S MARK	59	5.2%	-0.7%	61.70%	-4.30%
15	TEACHER'S	62	5.0%	-0.8%	52.77%	-4.23%
16	CANADIAN CLUB	64	4.8%	-0.7%	55.54%	-1.46%
17	BLACK VELVET	67	4.4%	-1.3%	44.29%	-10.71%
17	GLENFIDDICH	68	4.4%	0.5%	59.64%	6.64%
19	SEAGRAM'S 7 CROWN	71	4.2%	-3.2%	42.95%	-16.05%
20	BUCHANAN'S	75	3.4%	NEW ENTRY	39.46%	NEW ENTRY
21	THE GLENLIVET	76	3.3%	NEW ENTRY	61.96%	NEW ENTRY
22	100 PIPERS	83	2.9%	-1.6%	41.79%	-11.21%
22	CANADIAN MIST	87	2.9%	-2.0%	41.43%	-16.57%
22	WILD TURKEY	88	2.9%	-0.4%	47.59%	-12.41%
25	THE MACALLAN	90	2.8%	0.4%	62.50%	4.50%
25	CLAN CAMPBELL	91	2.8%	-1.5%	42.14%	-5.86%



MOST POWERFUL VODKA BRANDS

RANK	BRAND	OVERALL RANK	TOTAL SCORE 2011	CHANGE	BRAND SCORE 2011	CHANGE
1	SMIRNOFF	2	84.4%	-1%	73.04%	2%
2	ABSOLUT	7	35.3%	-4%	69.64%	1%
3	GREY GOOSE	17	12.6%	-1%	59.82%	50%
4	STOLICHNAYA	30	9.5%	1%	59.64%	10%
5	SKYY	35	8.6%	-1%	54.29%	-4%
6	SVEDKA	39	8.2%	-2%	47.23%	46%
7	CÎROC	40	8.1%	NEW ENTRY	53.04%	NEW ENTRY
8	PINNACLE	49	6.1%	3%	46.25%	1%
9	KETEL ONE	51	5.6%	-1%	50.71%	-4%
9	RUSSIAN STANDARD VODKA	53	5.6%	0%	48.39%	0%
11	THREE OLIVES	77	3.2%	-1%	45.54%	-9%
11	WYBOROWA	78	3.2%	-1%	45.00%	-6%
13	ERISTOFF	86	2.9%	-1%	45.36%	51%

MOST POWERFUL FLAVOURED SPIRITS BRANDS

RANK	BRAND	OVERALL RANK	TOTAL SCORE 2011	CHANGE	BRAND SCORE 2011	CHANGE
1	JÄGERMEISTER	11	19.9%	20%	65.00%	-1%
2	BAILEYS	13	18.2%	18%	62.86%	-4%
3	RICARD	22	11.3%	11%	48.84%	2%
4	MALIBU	31	9.5%	10%	56.25%	5%
5	DE KUYPER	33	9.4%	9%	52.86%	5%
6	FERNET BRANCA	38	8.3%	8%	47.68%	2%
7	APEROL	55	5.5%	5%	52.23%	-1%
8	SOUTHERN COMFORT	61	5.1%	5%	55.36%	-7%
9	KAHLÚA	73	3.8%	4%	50.18%	-7%
10	CAMPARI BITTERS	74	3.6%	4%	49.46%	6%
11	DISARONNO	81	3.0%	3%	50.18%	-3%
12	COINTREAU	93	2.6%	3%	53.93%	-12%
13	BOLS LIQUEURS	95	2.5%	3%	45.00%	-10%
14	RAMAZZOTTI AMARO	96	2.3%	2%	43.21%	-13%
14	GRAND MARNIER	97	2.3%	NEW ENTRY	56.61%	NEW ENTRY



MOST POWERFUL RUM BRANDS

RANK	BRAND	OVERALL RANK	TOTAL SCORE 2011	CHANGE	BRAND SCORE 2011	CHANGE
1	BACARDI	3	69.8%	5%	79.29%	13%
2	CAPTAIN MORGAN	8	31.9%	2%	71.79%	6%
3	HAVANA CLUB	23	11.2%	-1%	66.25%	2%
4	BRUGAL	37	8.4%	NEW ENTRY	51.07%	NEW ENTRY
5	CACIQUE	82	2.9%	-1%	42.77%	2%

MOST POWERFUL WINE BRANDS

RANK	BRAND	OVERALL RANK	TOTAL SCORE 2011	CHANGE	BRAND SCORE 2011	CHANGE
1	GALLO	18	12.2%	-7%	57.14%	-5%
2	HARDYS	26	10.7%	2%	57.23%	-3%
3	CONCHA Y TORO	29	10.0%	-8%	57.50%	-10%
4	ROBERT MONDAVI	32	9.5%	-1%	63.21%	-1%
5	YELLOWTAIL	41	8.1%	-1%	55.00%	2%
6	SUTTER HOME	44	7.6%	3%	50.00%	9%
7	LINDEMANS	50	5.7%	1%	53.75%	4%
8	BERINGER	63	4.9%	-1%	53.57%	6%
9	JACOB'S CREEK	65	4.8%	-1%	52.14%	-4%
10	BLOSSOM HILL	69	4.4%	-1%	49.46%	-9%
11	TORRES	84	2.9%	0%	53.48%	-3%
12	WOLF BLASS	92	2.7%	0%	52.68%	-7%
13	KENDALL JACKSON	99	2.2%	-1%	53.04%	1%
13	INGLENOOK	100	2.2%	-1%	48.21%	-5%

MOST POWERFUL BRANDY BRANDS

RANK	BRAND	OVERALL RANK	TOTAL SCORE 2011	CHANGE	BRAND SCORE 2011	CHANGE
1	HENNESSY	5	37.3%	-2%	75.00%	-1%
2	MARTELL	24	11.1%	2%	65.89%	13%
3	RÉMY MARTIN	36	8.5%	3%	64.64%	11%
4	DREHER	47	6.6%	-2%	42.68%	-10%
5	E & J BRANDY	56	5.3%	-3%	39.46%	-14%
6	COURVOISIER	72	4.1%	-1%	54.20%	-4%

MOST POWERFUL LIGHT APERITIF BRANDS

RANK	BRAND	OVERALL RANK	TOTAL SCORE 2011	CHANGE	BRAND SCORE 2011	CHANGE
1	MARTINI	4	37.8%	-17%	65.36%	-3%
2	APEROL	55	5.5%	-1%	52.23%	-1%
3	CINZANO VERMOUTH	66	4.7%	-1%	46.43%	-16%

MOST POWERFUL TEQUILA BRANDS

RANK	BRAND	OVERALL RANK	TOTAL SCORE 2011	CHANGE	BRAND SCORE 2011	CHANGE
1	JOSE CUERVO	20	11.5%	-9%	58.57%	-6%
2	PATRÓN	34	9.4%	-1%	60.00%	5%
3	SAUZA	54	5.5%	-2%	56.79%	4%
4	EL JIMADOR	80	3.0%	0%	50.71%	49%

MOST POWERFUL CHAMPAGNE & SPARKLING WINE BRANDS

RANK	BRAND	OVERALL RANK	TOTAL SCORE 2011	CHANGE	BRAND SCORE 2011	CHANGE
1	MOËT ET CHANDON	16	14.1%	-3%	73.75%	4%
2	VEUVE CLICQUOT	28	10.0%	-2%	70.63%	7%
3	FREIXENET	60	5.1%	-1%	57.32%	0%
4	DOM PÉRIGNON	70	4.2%	NEW ENTRY	67.68%	NEW ENTRY
5	MUMM	79	3.1%	0%	60.71%	7%
6	LAURENT PERRIER	85	2.9%	0%	56.79%	12%
7	MARTINI SPARKLING WINE	89	2.8%	0%	57.86%	-2%
8	NICOLAS FEUILLATTE	94	2.5%	0%	50.36%	-8%
9	PIPER HEIDSIECK	98	2.3%	NEW ENTRY	56.07%	NEW ENTRY

MOST POWERFUL GIN BRANDS

RANK	BRAND	OVERALL RANK	TOTAL SCORE 2011	CHANGE	BRAND SCORE 2011	CHANGE
1	GORDON'S GIN	25	10.9%	-1%	56.25%	2%
2	BOMBAY SAPPHIRE	43	7.7%	2%	66.52%	16%
3	BEEFEATER	46	6.7%	-1%	60.09%	-8%
4	TANQUERAY	48	6.1%	0%	55.18%	1%
5	SEAGRAM'S GIN	52	5.6%	3%	44.29%	-6%
6	LARIOS	98	2%	NEW ENTRY	42%	NEW ENTRY



SHARE OF MARKET

RANK	BRAND	SCORE
1	JOHNNIE WALKER	9.4
2	SMIRNOFF	9.1
3	BACARDI	8.9
3	GALLO	8.9
5	HENNESSY	8.6
6	MOËT ET CHANDON	8.4
7	MARTINI	8.0
8	JÄGERMEISTER	7.9
8	BAILEYS	7.9
8	CONCHA Y TORO	7.9

FUTURE GROWTH

RANK	BRAND	SCORE
1	JOHNNIE WALKER	7.7
2	JAMESON	7.3
3	MARTELL	6.7
3	MAKER'S MARK	6.7
5	BACARDI	6.3
5	CAPTAIN MORGAN	6.3
5	BOMBAY SAPPHIRE	6.3
5	CÎROC	6.3
9	HAVANA CLUB	6.0
10	HENNESSY	5.9
10	JACK DANIEL'S	5.9

PREMIUM PRICE POSITIONING

RANK	BRAND	SCORE
1	DOM PÉRIGNON	8.7
2	HENNESSY	8.1
3	JOHNNIE WALKER	7.4
4	PATRÓN	7.3
5	BOMBAY SAPPHIRE	7.1
5	CHIVAS REGAL	7.1
5	GREY GOOSE	7.1
8	MAKER'S MARK	7.0
8	THE MACALLAN	7.0
10	VEUVE CLICQUOT	6.9



MARKET SCOPE

RANK	BRAND	SCORE
1	BACARDI	8.7
2	JOHNNIE WALKER	8.6
3	SMIRNOFF	8.3
4	MOËT ET CHANDON	8.0
5	CHIVAS REGAL	7.9
6	ABSOLUT	7.7
6	JAMESON	7.7
8	VEUVE CLICQUOT	7.6
8	CAPTAIN MORGAN	7.6
10	HENNESSY	7.4

AWARENESS

RANK	BRAND	SCORE
1	BACARDI	9.3
1	SMIRNOFF	9.3
3	JOHNNIE WALKER	8.9
4	MOËT ET CHANDON	8.4
4	ABSOLUT	8.4
6	CAPTAIN MORGAN	8.0
6	DOM PÉRIGNON	8.0
8	BAILEYS	7.9
9	VEUVE CLICQUOT	7.7
9	MARTINI	7.7

RELEVANCE

RANK	BRAND	SCORE
1	JOHNNIE WALKER	8.0
2	BACARDI	7.7
3	SMIRNOFF	7.4
4	CAPTAIN MORGAN	7.3
5	MOËT ET CHANDON	7.1
5	CHIVAS REGAL	7.1
5	HENNESSY	7.1
8	ABSOLUT	7.0
8	VEUVE CLICQUOT	7.0
10	JACK DANIEL'S	6.9
10	BOMBAY SAPPHIRE	6.9

HERITAGE

RANK	BRAND	SCORE
1	BACARDI	8.6
2	JOHNNIE WALKER	8.3
3	MOËT ET CHANDON	8.0
3	DOM PÉRIGNON	8.0
5	HAVANA CLUB	7.9
6	CHIVAS REGAL	7.7
6	VEUVE CLICQUOT	7.7
8	CAPTAIN MORGAN	7.6
8	HENNESSY	7.6
8	RÉMY MARTIN	7.6
8	STOLICHNAYA	7.6

BRAND PERCEPTION

RANK	BRAND	SCORE
1	JOHNNIE WALKER	8.6
2	DOM PÉRIGNON	8.1
3	HENNESSY	7.9
4	BACARDI	7.7
5	CHIVAS REGAL	7.6
6	BOMBAY SAPPHIRE	7.4
7	MOËT ET CHANDON	7.3
7	CAPTAIN MORGAN	7.3
7	ABSOLUT	7.3
7	MAKER'S MARK	7.3



10 BIGGEST BRAND OWNERS

RANK	CHANGE	OWNER	TOTAL SCORE TOTAL	CHANGE	BRAND SCORE TOTAL	CHANGE	NUMBER IN TOP 100	CHANGE
1	-	DIAGEO	304.4%	7%	851%	28%	15	1
2	-	PERNOD RICARD	185.4%	-15%	1009%	-5%	18	-
3	-	BACARDI MARTINI	157.0%	-9%	476%	28%	8	-
4	-	LVMH	65.6%	-2%	287%	77%	4	1
5	-	BROWN-FORMAN	54.7%	-6%	272%	-31%	5	-
6	-	BEAM INC	47.7%	-6%	388%	-70%	7	-1
7	-	CAMPARI	31.8%	-8%	293%	-36%	6	-
8	-	CONSTELLATION	22.1%	-4%	155%	-19%	3	-1
9	1	MAST-JÄGERMEISTER	19.9%	-2%	65%	-1%	1	-
10	10	THE ERDINGTON GROUP	18.4%	10%	167%	112%	3	2
11	-2	GALLO	17.5%	-10%	97%	-18%	2	-
12	-	WILLIAM GRANT & SONS	15.7%	0%	112%	10%	2	-
13	-	TREASURY WINE ESTATES	13.3%	-1%	160%	2%	3	-
14	2	RÉMY COINTREAU	11.1%	-2%	119%	-1%	2	-
15	2	ACCOLADE WINES	10.7%	2%	57%	-3%	1	-
16	-5	CONCHA Y TORO	10.0%	-8%	58%	-9%	1	-
17	2	SPI	9.5%	1%	60%	10%	1	-
18	-3	PATRÓN GROUP	9.4%	-1%	60%	5%	1	-
19	-5	DE KUYPER AND BEAM INC	9.4%	-3%	53%	5%	1	-
20	1	FRANCELLI BRANCA	8.3%	0%	48%	2%	1	-
21	-3	CASELLA WINES	8.1%	-1%	55%	2%	1	-
22	4	SUTTER HOME WINERY	7.6%	3%	50%	9%	1	-
23	-1	DIAGEO AND NOLET FAMILY	5.6%	-1%	51%	-4%	1	-
24	-	RUSSIAN STANDARD VODKA	5.6%	0%	48%	0%	1	-
25	-2	FREIXENET	5.1%	-1%	57%	0%	1	-
26	2	PROXIMO SPIRITS	3.2%	-1%	46%	-9%	1	-
27	7	ILLVA SARONNO	3.0%	0%	50%	-3%	1	-
28	7	BERNAD DE NONANCO	2.9%	0%	57%	12%	1	-
29	-	TORRES FAMILY	2.9%	0%	54%	-2%	1	-
30	-	CV-CNF	2.5%	-1%	50%	-8%	1	-
31	-4	LUCAS BOLS BV (FORMERLY ABN AMRO CAPITAL & MANAGEMENT)	2.5%	-2%	45%	-10%	1	-
32	NEW ENTRY	MARNIER-LOPOSTOLLE	2.3%	-	57%	-	1	NEW ENTRY
33	NEW ENTRY	EPI	2.3%	-	56%	-	1	NEW ENTRY
34	-3	THE WINE GROUP	2.2%	-1%	48%	-5%	1	-
35	-2	JACKSON FAMILY WINES	2.2%	-1%	53%	1%	1	-



MOST POWERFUL COUNTRIES OF ORIGINS

RANK	CHANGE	COUNTRY OF ORIGIN	TOTAL SCORE TOTAL	CHANGE	TOTAL BRAND SCORE	CHANGE	NUMBER IN TOP 100	CHANGE
1	0	SCOTLAND	226%	13%	889%	100%	16	2
2	0	USA	153%	-25%	964%	-126%	18	-1
3	0	FRANCE	143%	14%	1014%	269%	17	4
4	0	RUSSIA	102%	-2%	226%	3%	4	0
5	-1	CUBA	81%	4%	146%	16%	2	1
6	1	ITALY	68%	-23%	412%	-29%	8	0
7	0	SWEDEN	44%	-6%	117%	-7%	2	0
8	0	DOMINICAN REPUBLIC	40%	10%	123%	57%	2	0
9	0	ENGLAND	35%	-4%	284%	-46%	5	-1
10	0	MEXICO	33%	-13%	276%	49%	5	0
11	0	IRELAND	33%	1%	131%	7%	2	0
12	2	CANADA	24%	-7%	198%	-74%	4	-1
13	0	AUSTRALIA	21%	-1%	214%	-5%	4	0
14	4	GERMANY	20%	-8%	65%	-106%	1	-2
15	3	HOLLAND	18%	-5%	149%	-9%	3	0
16	3	CHILE	10%	-8%	58%	-10%	1	0
17	3	SPAIN	8%	-8%	111%	-107%	2	-2
18	4	FINLAND	8%	-1%	56%	-4%	1	0
19	4	BRAZIL	7%	-2%	43%	-10%	1	0
20	4	POLAND	3%	-1%	45%	-6%	1	0
21	4	VENEZUELA	3%	-1%	43%	2%	1	0



SCOTLAND

RANK	BRAND	SUB CATEGORY	OWNER	OVERALL RANK
1	JOHNNIE WALKER	BLENDED SCOTCH	DIAGEO	1
2	CHIVAS REGAL	BLENDED SCOTCH	PERNOD RICARD	9
3	BALLANTINES	BLENDED SCOTCH	PERNOD RICARD	10
4	DEWARS	BLENDED SCOTCH	BACARDI MARTINI	12
5	GRANT'S SCOTCH	BLENDED SCOTCH	WILLIAM GRANT & SONS	21
6	J & B	BLENDED SCOTCH	DIAGEO	27
7	FAMOUS GROUSE	BLENDED SCOTCH	EDRINGTON GROUP	45
8	WILLIAM LAWSON'S	BLENDED SCOTCH	BACARDI MARTINI	57
9	BELL'S	BLENDED SCOTCH	DIAGEO	58
10	TEACHER'S	BLENDED SCOTCH	BEAM INC	62
11	GLENFIDDICH	MALT SCOTCH	WILLIAM GRANT & SONS	68
12	BUCHANAN'S	BLENDED SCOTCH	DIAGEO	75
13	THE GLENLIVET	MALT SCOTCH	PERNOD RICARD	76
14	100 PIPERS	BLENDED SCOTCH	PERNOD RICARD	83
15	THE MACALLAN	MALT SCOTCH	EDRINGTON GROUP	90
16	CLAN CAMPBELL	BLENDED SCOTCH	PERNOD RICARD	91

USA

RANK	BRAND	SUB CATEGORY	OWNER	OVERALL RANK
1	JACK DANIEL'S	US WHISKEY	BROWN-FORMAN	6
2	JIM BEAM	US WHISKEY	BEAM INC	14
3	GALLO	STILL LIGHT WINE	GALLO	18
4	HARDYS	STILL LIGHT WINE	ACCOLADE WINES	26
5	MALIBU	LIQUEURS	PERNOD RICARD	31
6	ROBERT MONDAVI	STILL LIGHT WINE	CONSTELLATION	32
7	SKYY	US VODKA	CAMPARI	35
8	SUTTER HOME	STILL LIGHT WINE	SUTTER HOME WINERY	44
9	SEAGRAM'S GIN	GIN / GENEVER	PERNOD RICARD	52
10	E & J BRANDY	OTHER BRANDY	GALLO	56
11	MAKER'S MARK	US WHISKEY	BEAM INC	59
12	SOUTHERN COMFORT	LIQUEURS	BROWN-FORMAN	61
13	BERINGER	STILL LIGHT WINE	TREASURY WINE ESTATES	63
14	BLOSSOM HILL	STILL LIGHT WINE	DIAGEO	69
15	SEAGRAM'S 7 CROWN	US WHISKEY	DIAGEO	71
16	WILD TURKEY	US WHISKEY	CAMPARI	88
17	KENDALL JACKSON	STILL LIGHT WINE	JACKSON FAMILY WINES	99
18	INGLENOOK	STILL LIGHT WINE	THE WINE GROUP	100

FRANCE

RANK	BRAND	SUB CATEGORY	OWNER	OVERALL RANK
1	HENNESSY	COGNAC	LVMH	5
2	MOËT ET CHANDON	CHAMPAGNE	LVMH	16
3	GREY GOOSE	FRENCH VODKA	BACARDI MARTINI	17
4	RICARD	ANISEED	PERNOD RICARD	22
5	MARTELL	COGNAC	PERNOD RICARD	24
6	VEUVE CLICQUOT	CHAMPAGNE	LVMH	28
7	RÉMY MARTIN	COGNAC	REMY COINTREAU	36
8	CÎROC	VODKA	DIAGEO	40
9	PINNACLE	FRENCH VODKA	BEAM INC.	49
10	DOM PÉRIGNON	CHAMPAGNE	LVMH	70
11	COURVOISIER	COGNAC	BEAM INC	72
12	MUMM	CHAMPAGNE	PERNOD RICARD	79
13	LAURENT-PERRIER	CHAMPAGNE	BERNARD DE NONANCOURT	85
14	COINTREAU	LIQUEURS	REMY COINTREAU	93
15	NICOLAS FEUILLATTE	CHAMPAGNE	CV-CNF	94
16	GRAND MARNIER	LIQUEURS	MARNIER-LAPOSTOLLE	97
17	PIPER HEIDSIECK	CHAMPAGNE	REMY COINTREAU	98

RUSSIA

RANK	BRAND	SUB CATEGORY	OWNER	OVERALL RANK
1	SMIRNOFF	WHITE SPIRITS	DIAGEO	2
2	STOLICHNAYA	WHITE SPIRITS	SPI	30
3	RUSSIAN STANDARD	WHITE SPIRITS	RUSSIAN STANDARD	53
4	ERISTOFF	WHITE SPIRITS	BACARDI MARTINI	86

CUBA

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

ITALY

RANK	BRAND	SUB CATEGORY	OWNER	OVERALL RANK
1	MARTINI	LIGHT APERITIF	BACARDI MARTINI	4
2	FERNET-BRANCA	BITTERS / SPIRIT APERITIFS	FRANTELLI BRANCA	38
3	APEROL	LIGHT APERITIF	CAMPARI	55
4	CINZANO VERMOUTH	LIGHT APERITIF	CAMPARI	66
5	CAMPARI BITTERS	BITTERS / SPIRIT APERITIFS	CAMPARI	74
6	DISARONNO	LIQUEURS	ILLVA SARONNO	81
7	MARTINI SPARKLING WINE	OTHER SPARKLING	BACARDI MARTINI	89
8	RAMAZZOTTI AMARI	BITTERS / SPIRIT APERITIFS	PERNOD RICARD	96



SWEDEN

RANK	BRAND	SUB CATEGORY	OWNER	OVERALL RANK
1	ABSOLUT	SWEDISH VODKA	PERNOD RICARD	7
2	SVEDKA	SWEDISH VODKA	CONSTELLATION	39

MEXICO

RANK	BRAND	SUB CATEGORY	OWNER	OVERALL RANK
1	EL JIMADOR	TEQUILA	BROWN-FORMAN	20
2	JOSE CUERVO	TEQUILA	DIAGEO	34
3	PATRÓN	TEQUILA	PATRON GROUP	54
4	SAUZA	TEQUILA	BEAM INC	73
5	KAHLÚA	LIQUEURS	PERNOD RICARD	80

ENGLAND

RANK	BRAND	SUB CATEGORY	OWNER	OVERALL RANK
1	GORDON'S GIN	GIN / GENEVER	DIAGEO	25
2	BOMBAY SAPPHIRE	GIN / GENEVER	BACARDI MARTINI	43
3	BEEFEATER	GIN / GENEVER	PERNOD RICARD	46
4	TANQUERAY	GIN / GENEVER	DIAGEO	48
5	THREE OLIVES	ENGLISH VODKA	PROXIMO SPIRITS	77

IRELAND

RANK	BRAND	SUB CATEGORY	OWNER	OVERALL RANK
1	BAILEYS	LIQUEURS	DIAGEO	13
2	JAMESON	BLENDED IRISH WHISKEY	PERNOD RICARD	15

AUSTRALIA

RANK	BRAND	SUB CATEGORY	OWNER	OVERALL RANK
1	YELLOWTAIL	STILL LIGHT WINE	CASELLA WINES	41
2	LINDEMANS	STILL LIGHT WINE	TREASURY WINE ESTATES	50
3	JACOB'S CREEK	STILL LIGHT WINE	PERNOD RICARD	65
4	WOLF BLASS	STILL LIGHT WINE	TREASURY WINE ESTATES	92
5	WOLF BLASS	STILL LIGHT WINE	FOSTERS	90
6	PENFOLDS	STILL LIGHT WINE	FOSTERS	99

CANADA

RANK	BRAND	SUB CATEGORY	OWNER	OVERALL RANK
1	CROWN ROYAL	CANADIAN WHISKY	DIAGEO	19
2	CANADIAN CLUB	CANADIAN WHISKY	BEAM INC	64
3	BLACK VELVET	CANADIAN WHISKY	CONSTELLATION	67
4	CANADIAN MIST	CANADIAN WHISKY	BROWN-FORMAN	87

GERMANY

RANK	BRAND	SUB CATEGORY	OWNER	OVERALL RANK
1	JÄGERMEISTER	BITTERS / SPIRIT APERITIFS	MAST-JAGERMEISTER	11



HOLLAND

RANK	BRAND	SUB CATEGORY	OWNER	OVERALL RANK
1	DE KUYPER	LIQUEURS	DE KUYPER AND BEAM INC	33
2	KETEL ONE	DUTCH VODKA	DIAGEO AND NOLET FAMILY	51
3	BOLS LIQUEURS	LIQUEURS	LUCAS BOLS BV	95

CHILE

RANK	BRAND	SUB CATEGORY	OWNER	OVERALL RANK
1	CONCHA Y TORO	STILL LIGHT WINE	CONCHA Y TORO	29

SPAIN

RANK	BRAND	SUB CATEGORY	OWNER	OVERALL RANK
1	FREIXENET	OTHER SPARKLING	FREIXENET	60
2	TORRES	STILL LIGHT WINE	TORRES FAMILY	84

FINLAND

RANK	BRAND	SUB CATEGORY	OWNER	OVERALL RANK
1	FINLANDIA	FINISH VODKA	BROWN-FORMAN	42

BRAZIL

RANK	BRAND	SUB CATEGORY	OWNER	OVERALL RANK
1	DREHER	OTHER BRANDY	CAMPARI	47

POLAND

RANK	BRAND	SUB CATEGORY	OWNER	OVERALL RANK
1	WYBOROWA	POLISH VODKA	PERNOD RICARD	78

VENEZUELA

RANK	BRAND	SUB CATEGORY	OWNER	OVERALL RANK
1	CACIQUE	RUM / CANE	DIAGEO	82

DOMICAN REPUBLIC

RANK	BRAND	SUB CATEGORY	OWNER	OVERALL RANK
1	CAPTAIN MORGAN	RUM / CANE	DIAGEO	8
2	BRUGAL	RUM / CANE	ERDINGTON GROUP	37

THE TOP 100



Rank	Rank Change	Brand	Sub category	Owner	Country	Total score 2013	Total score difference	Brand score 2013	Brand score difference	Share of market	Future Growth	Premium Price Positioning	Market Scope	Awareness	Relevance	Heritage	Brand perception
1	1	Johnnie Walker	Blended Scotch	Diageo	Scotland	90.7%	17%	83.57%	11%	9.4	7.7	7.4	8.6	8.9	8.0	8.3	8.6
2	-1	Smirnoff	Vodka	Diageo	Russia	84.4%	-1%	73.04%	2%	9.1	5.1	4.7	8.3	9.3	7.4	7.4	7.0
3	0	Bacardi	Rum / Cane	Bacardi Martini	Cuba	69.8%	5%	79.29%	13%	8.9	6.3	6.3	8.7	9.3	7.7	8.6	7.7
4	0	Martini	Light Aperitif	Bacardi Martini	Italy	37.8%	-17%	65.36%	-3%	8.0	4.6	5.4	6.6	7.7	6.1	7.3	6.6
5	0	Hennessy	Cognac	LVMH	France	37.3%	-2%	75.00%	-1%	8.6	5.9	8.1	7.4	7.4	7.1	7.6	7.9
6	1	Jack Daniel's	US Whiskey	Brown-Farman	USA	36.0%	-2%	68.93%	-7%	7.1	5.9	6.3	7.1	7.6	6.9	7.3	7.0
7	-1	ABSOLUT	Swedish Vodka	Pernod Ricard	Sweden	35.3%	-4%	69.64%	1%	7.4	5.0	6.0	7.7	8.4	7.0	6.9	7.3
8	1	Captain Morgan	Rum / Cane	Diageo	Dominican Republic	31.9%	2%	71.79%	6%	7.7	6.3	5.7	7.6	8.0	7.3	7.6	7.3
9	-1	Chivas Regal	Blended Scotch	Pernod Ricard	Scotland	30.8%	-2%	70.63%	-1%	5.9	5.6	7.1	7.9	7.6	7.1	7.7	7.6
10	0	Ballantine's	Blended Scotch	Pernod Ricard	Scotland	22.5%	-2%	61.88%	4%	6.8	4.9	5.3	6.3	6.7	6.1	6.7	6.7
11	0	Jägermeister	Bitters / Spirit Aperitifs	Mast-Jägermeister	Germany	19.9%	-2%	65.00%	-1%	7.9	5.3	5.7	6.3	7.1	6.1	6.7	6.9
12	6	Dewar's	Blended Scotch	Bacardi Martini	Scotland	18.2%	5%	56.79%	15%	4.4	5.0	5.6	6.1	6.3	5.3	6.9	5.9
13	-1	Baileys	Liqueurs	Diageo	Ireland	18.2%	-2%	62.86%	-4%	7.9	3.9	5.3	6.7	7.9	6.4	5.9	6.4
14	1	Jim Beam	US Whiskey	Beam Inc	USA	16.9%	-1%	61.07%	-1%	6.3	5.3	4.7	5.9	7.1	6.1	7.0	6.4
15	7	Jameson	Blended Irish Whiskey	Pernod Ricard	Ireland	15.1%	3%	68.57%	12%	6.4	7.3	5.9	7.7	6.9	6.6	7.3	6.9
16	1	Moët et Chandon	Champagne	LVMH	France	14.1%	-3%	73.75%	4%	8.4	5.4	6.3	8.0	8.4	7.1	8.0	7.3
17	2	Grey Goose	French Vodka	Bacardi Martini	France	12.6%	-1%	59.82%	5%	5.1	5.0	7.1	5.7	6.4	6.3	5.1	7.0
18	-4	Gallo	Still Light Wine	Gallo	USA	12.2%	-7%	57.14%	-5%	8.9	4.6	3.9	6.7	7.3	4.7	5.0	4.7
19	2	Crown Royal	Canadian Whisky	Diageo	Canada	12.2%	0%	56.96%	5%	6.4	4.0	5.7	5.4	6.0	5.6	6.4	6.0
20	-7	Jose Cuervo	Tequila	Diageo	Mexico	11.5%	-8%	58.57%	-6%	6.6	3.6	4.6	6.6	7.4	5.7	6.7	5.7
21	4	Grant's Scotch	Blended Scotch	William Grant & Sons	Scotland	11.3%	-1%	51.96%	3%	6.0	4.0	4.3	5.6	5.7	4.7	6.0	5.3
22	-2	Ricard	Aniseed	Pernod Ricard	France	11.3%	-2%	48.84%	2%	6.2	3.1	3.9	3.4	4.9	4.3	7.4	5.9
23	0	Havana Club	Rum / Cane	Pernod Ricard	Cuba	11.2%	-1%	66.25%	2%	5.7	6.0	6.0	6.7	6.9	6.7	7.9	7.1
24	9	Martell	Cognac	Pernod Ricard	France	11.1%	2%	65.89%	13%	5.6	6.7	6.7	6.6	6.9	6.1	7.4	6.7
25	3	Gordon's Gin	Gin / Genever	Diageo	England	10.9%	-1%	56.25%	2%	7.3	3.7	4.7	5.9	7.0	4.9	6.1	5.4
26	8	Hardys	Still Light Wine	Accolade Wines	USA	10.7%	2%	57.23%	-3%	6.9	4.7	4.6	6.0	6.6	5.9	5.7	5.4
27	-3	J&B	Blended Scotch	Diageo	Scotland	10.3%	-2%	54.82%	-5%	5.4	3.4	4.7	5.3	6.6	5.3	6.9	6.3
28	-1	Veuve Clicquot	Champagne	LVMH	France	10.0%	-2%	70.63%	7%	6.9	5.8	6.9	7.6	7.7	7.0	7.7	7.0
29	-13	Concha y Toro	Still Light Wine	Concha y Toro	Chile	10.0%	-8%	57.50%	-10%	7.9	4.1	4.9	6.6	6.0	5.7	5.1	5.7

THE TOP 100



Rank	Brand	Sub category	Owner	Country	Total score 2013	Total score difference	Brand score 2013	Brand score difference	Share of market	Future Growth	Premium Price Positioning	Market Scope	Awareness	Relevance	Heritage	Brand perception
30	7	Stolichnaya	SPI	Russia	9.5%	1%	59.64%	10%	4.7	4.6	6.0	5.6	6.6	6.1	7.6	6.6
31	5	Malibu	Pernod Ricard	USA	9.5%	1%	56.25%	5%	5.7	5.1	5.4	5.4	6.7	5.1	5.3	6.1
32	-2	Robert Mondavi	Constellation	USA	9.5%	-1%	63.21%	-1%	6.7	5.3	6.1	6.4	6.7	6.3	6.6	6.4
33	-7	De Kuyper	De Kuyper and Beam Inc	Holland	9.4%	-2%	52.86%	5%	6.1	4.4	4.6	5.9	6.1	4.9	5.3	5.0
34	-5	Patrón	Patrón Group	Mexico	9.4%	-1%	60.00%	5%	4.6	5.4	7.3	5.7	5.9	6.4	5.9	6.9
35	-3	SKYY	Campari	USA	8.6%	-1%	54.29%	-4%	4.9	5.3	5.7	4.9	6.6	5.4	5.1	5.6
36	23	Rémy Martin	Remy Cointreau	France	8.5%	3%	64.64%	11%	4.9	5.7	6.7	6.4	6.9	6.7	7.6	6.9
37	-	Brugal	Edrington Group	Dominican Republic	8.4%	-	51.07%	-	4.9	4.4	5.1	4.9	5.3	5.1	5.9	5.3
38	6	Fernet-Branca	Frantelli Branca	Italy	8.3%	1%	47.68%	2%	5.3	4.3	4.4	4.9	4.7	4.4	5.1	5.0
39	-8	SVEDKA	Constellation	Sweden	8.2%	-2%	47.23%	-8%	4.4	5.7	4.7	4.1	4.6	5.0	4.3	5.0
40	-	CÎROC	Diageo	France	8.1%	-	53.04%	-	4.4	6.3	6.6	5.0	4.4	5.1	4.6	6.0
41	-6	Yellowtail	Casella Wines	Australia	8.1%	-1%	55.00%	2%	7.0	4.9	5.0	5.3	6.4	5.3	4.9	5.3
42	-4	Finlandia	Brown-Forman	Finland	7.8%	-1%	55.71%	-4%	5.3	4.6	5.4	5.6	6.7	5.3	5.9	5.9
43	14	Bombay Sapphire	Bacardi Martini	England	7.7%	2%	66.52%	16%	5.6	6.3	7.1	6.6	6.9	6.9	6.4	7.4
44	23	Sutter Home	Sutter Home Winery	USA	7.6%	3%	50.00%	9%	6.4	4.3	4.3	4.9	6.1	4.6	4.4	5.0
45	-2	Famous Grouse	Edrington Group	Scotland	7.1%	-1%	53.57%	-1%	4.1	5.0	4.9	5.6	5.9	5.7	5.9	5.9
46	-5	Beefeater	Pernod Ricard	England	6.7%	-1%	60.09%	-8%	5.6	4.9	5.3	6.4	7.0	6.0	6.6	6.3
47	-8	Dreher	Campari	Brazil	6.6%	-2%	42.68%	-10%	5.6	4.0	4.1	3.6	4.0	4.3	4.6	4.0
48	4	Tanqueray	Diageo	England	6.1%	0%	55.18%	1%	4.1	4.3	6.4	5.4	5.7	5.4	5.9	6.9
49	49	Pinnacle	Beam Inc.	France	6.1%	3%	46.25%	1%	4.7	5.4	4.9	4.1	4.4	4.6	4.4	4.4
50	19	Lindemans	Treasury Wine Estates	Australia	5.7%	1%	53.75%	4%	6.0	4.6	5.0	5.1	6.0	5.0	5.6	5.7
51	-1	Ketel One	Diageo and Nolet family	Holland	5.6%	-1%	50.71%	-4%	4.4	4.6	5.9	4.4	5.0	5.7	5.0	5.6
52	-5	Seagram's Gin	Pernod Ricard	USA	5.6%	-1%	44.29%	-6%	5.3	3.7	4.1	3.3	5.1	4.4	4.9	4.6
53	1	Russian Standard Vodka	Russian Standard	Russia	5.6%	0%	48.39%	0%	4.0	4.9	5.3	4.4	5.1	5.1	5.0	4.9
54	-12	Sauza	Beam Inc	Mexico	5.5%	-2%	56.79%	4%	5.1	4.6	5.0	5.9	6.6	5.7	6.6	6.0
55	-7	Aperol	Campari	Italy	5.5%	-1%	52.23%	-1%	5.1	5.3	5.3	4.7	5.1	4.9	5.7	5.7
56	-16	E&J Brandy	Gallo	USA	5.3%	-3%	39.46%	-14%	4.9	3.4	3.6	3.3	4.1	4.1	4.0	4.1
57	-2	William Lawson's	Bacardi Martini	Scotland	5.2%	-1%	45.18%	-7%	3.4	5.4	4.4	4.3	4.6	4.1	5.3	4.7
58	-12	Bell's	Diageo	Scotland	5.2%	-2%	50.63%	-4%	4.5	3.7	4.6	4.4	6.0	5.0	6.6	5.7

THE TOP 100

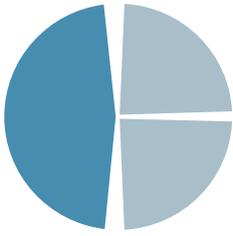


Rank	Rank Change	Brand	Sub category	Owner	Country	Total score 2013	Total score difference	Brand score 2013	Brand score difference	Share of market	Future Growth	Premium Price Positioning	Market Scope	Awareness	Relevance	Heritage	Brand perception
59	-1	Maker's Mark	US Whiskey	Beam Inc	USA	5.2%	-1%	61.70%	-4%	3.8	6.7	7.0	5.1	6.7	6.3	6.4	7.3
60	-9	Freixenet	Other Sparkling	Freixenet	Spain	5.1%	-1%	57.32%	0%	7.4	4.4	4.6	6.3	6.9	5.0	6.0	5.3
61	-12	Southern Comfort	Liqueurs	Brown-Forman	USA	5.1%	-2%	55.36%	-7%	4.3	3.9	5.4	6.0	6.3	6.0	6.4	6.0
62	-2	Teacher's	Blended Scotch	Beam Inc	Scotland	5.0%	-1%	52.77%	-4%	3.5	5.1	4.9	5.1	6.0	5.6	6.4	5.6
63	-10	Beringer	Still Light Wine	Treasury Wine Estates	USA	4.9%	-1%	53.57%	6%	5.9	4.0	4.9	4.9	5.9	5.4	6.0	6.0
64	0	Canadian Club	Canadian Whisky	Beam Inc	Canada	4.8%	-1%	55.54%	-1%	5.1	4.7	4.9	5.6	6.6	4.9	7.0	5.7
65	-2	Jacob's Creek	Still Light Wine	Pernod Ricard	Australia	4.8%	-1%	52.14%	-4%	5.7	4.4	4.3	5.6	6.3	5.0	5.3	5.1
66	-10	Cinzano	Light Aperitif	Campari	Italy	4.7%	-1%	46.43%	-16%	3.4	3.4	4.3	5.6	5.3	4.0	6.0	5.1
67	-5	Black Velvet	Canadian Whisky	Constellation	Canada	4.4%	-1%	44.29%	-11%	4.1	4.1	4.3	4.0	4.7	4.4	5.1	4.6
68	9	Glenfiddich	Malt Scotch	William Grant & Sons	Scotland	4.4%	0%	59.64%	7%	6.6	5.0	6.0	5.9	5.9	5.6	6.6	6.3
69	-4	Blossom Hill	Still Light Wine	Diageo	USA	4.4%	-1%	49.46%	-9%	6.0	4.6	4.1	4.6	6.0	4.7	4.4	5.1
70	36	Dom Pérignon	Champagne	LVMH	France	4.2%	2%	67.68%	11%	3.4	4.9	8.7	6.6	8.0	6.4	8.0	8.1
71	-26	Seagram's 7 Crown	US Whiskey	Diageo	USA	4.2%	-3%	42.95%	-16%	3.8	3.3	4.6	3.9	4.9	3.9	4.9	5.3
72	-1	Courvoisier	Cognac	Beam Inc	France	4.1%	-1%	54.20%	-4%	3.9	5.1	5.7	5.3	5.7	5.7	6.1	5.9
73	-3	Kahlúa	Liqueurs	Pernod Ricard	Mexico	3.8%	-1%	50.18%	-7%	4.7	3.7	4.4	4.9	6.4	4.9	5.9	5.3
74	-13	Campari Bitters	Bitters / Spirit Aperitifs	Campari	Italy	3.6%	-2%	49.46%	6%	4.4	4.0	4.3	5.6	5.1	4.7	5.9	5.6
75	-	Buchanan's	Blended Scotch	Diageo	Scotland	3.4%	-	39.46%	-	3.1	4.4	3.6	3.3	4.0	3.6	5.3	4.3
76	34	The Glenlivet	Malt Scotch	Pernod Ricard	Scotland	3.3%	1%	61.96%	15%	6.1	5.3	6.1	6.1	6.3	6.4	6.4	6.7
77	1	Three Olives	English Vodka	Proximo Spirits	England	3.2%	-1%	45.54%	-9%	3.6	5.1	5.4	4.6	4.3	4.7	4.3	4.4
78	-4	Wyborowa	Polish Vodka	Pernod Ricard	Poland	3.2%	-1%	45.00%	-6%	4.0	4.3	4.6	4.0	5.0	4.3	5.3	4.6
79	14	G. H. Mumm	Champagne	Pernod Ricard	France	3.1%	0%	60.71%	7%	5.3	4.9	5.3	6.3	7.1	6.1	7.0	6.6
80	14	El Jimador	Tequila	Brown-Forman	Mexico	3.0%	0%	50.71%	4%	4.0	5.0	5.3	5.1	5.0	5.1	6.1	4.9
81	18	Disaronno	Liqueurs	Ilva Saronno	Italy	3.0%	0%	50.18%	-3%	3.3	4.4	4.9	5.7	5.7	5.1	5.7	5.3
82	-2	Cacique	Rum / Cane	Diageo	Venezuela	2.9%	-1%	42.77%	2%	3.6	3.9	4.4	4.0	4.0	4.1	5.4	4.7
83	-11	100 Pipers	Blended Scotch	Pernod Ricard	Scotland	2.9%	-2%	41.79%	-11%	3.3	3.4	3.4	4.1	4.9	4.6	5.4	4.3
84	-2	Torres	Still Light Wine	Torres Family	Spain	2.9%	0%	53.48%	-3%	4.2	4.9	5.0	5.7	5.9	5.7	5.4	6.0
85	11	Laurent-Perrier	Champagne	Bernard de Nonancourt	France	2.9%	0%	56.79%	12%	4.4	4.9	5.6	5.9	6.3	5.6	6.7	6.1
86	-11	Eristoff	Georgian Vodka	Bacardi Martini	Russia	2.9%	-1%	45.36%	-9%	3.7	5.1	4.7	4.7	4.3	4.4	4.3	5.0
87	-19	Canadian Mist	Canadian Whisky	Brown-Forman	Canada	2.9%	-2%	41.43%	-17%	3.6	3.7	4.1	3.9	4.3	4.0	5.1	4.4

THE TOP 100



Rank	Rank Change	Brand	Sub category	Owner	Country	Total score 2013	Total score difference	Brand score 2013	Brand score difference	Share of market	Future Growth	Premium Price Positioning	Market Scope	Awareness	Relevance	Heritage	Brand perception
88	-5	Wild Turkey	US Whiskey	Campari	USA	2.9%	0%	47.59%	-12%	3.3	4.8	5.0	4.3	5.4	4.4	6.0	4.9
89	-3	Martini Sparkling Wine	Other Sparkling	Bacardi Martini	Italy	2.8%	0%	57.86%	-2%	5.7	4.4	5.3	6.4	6.7	5.1	7.0	5.6
90	13	The Macallan	Malt Scotch	Edrington Group	Scotland	2.8%	0%	62.50%	5%	5.1	5.6	7.0	6.0	6.1	6.1	6.9	7.1
91	-18	Cian Campbell	Blended Scotch	Pernod Ricard	Scotland	2.8%	-1%	42.14%	-6%	3.4	4.0	3.9	3.9	4.4	4.0	5.4	4.7
92	0	Wolf Blass	Still Light Wine	Treasury Wine Estates	Australia	2.7%	0%	52.68%	-7%	3.9	4.9	5.4	5.4	5.7	5.7	5.4	5.7
93	-12	Cointreau	Liqueurs	Remy Cointreau	France	2.6%	-1%	53.93%	-12%	3.3	4.4	5.3	6.1	6.0	5.6	6.6	5.9
94	-6	Nicolas Feuillatte	Champagne	CV-CNF	France	2.5%	0%	50.36%	-8%	4.6	5.3	5.1	5.0	5.1	4.7	5.6	4.9
95	-19	Bols Liqueurs	Liqueurs	Lucas Bols BV	Holland	2.5%	-2%	45.00%	-10%	3.4	3.9	4.1	5.1	5.4	4.0	5.3	4.7
96	-17	Ramazotti Amaro	Bitters / Spirit Aperitifs	Pernod Ricard	Italy	2.3%	-1%	43.21%	-13%	3.6	3.6	4.6	4.3	4.4	3.9	5.3	5.0
97	10	Grand Marnier	Liqueurs	Marnier-Lapostolle	France	2.3%	0%	56.61%	7%	3.1	4.4	6.1	6.1	6.6	5.6	6.7	6.6
98	13	Piper Heidsieck	Champagne	EPI	France	2.3%	0%	56.07%	8%	5.1	4.9	5.1	5.9	5.9	5.1	6.9	6.0
99	-9	Kendall Jackson	Still Light Wine	Jackson Family Wines	USA	2.2%	-1%	53.04%	1%	5.0	4.3	5.1	4.4	6.1	6.0	5.1	6.3
100	-15	Inglennook	Still Light Wine	The Wine Group	USA	2.2%	-1%	48.21%	-5%	5.1	4.0	4.0	4.7	5.6	4.6	5.3	5.3



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