A new generation of posher, trendier (and pink!) drinks has captured the imagination of Britain's shoppers, who are drinking considerably less, but better booze. Which spells bad news for some of the category's biggest players. So who's come out on top?

A new dawn for Britain's booze aisles...

Daniel Woolfson

Craft beer. Pink spirits. Spanish lagers and enough pricey apple cider to knock out a small elephant: this is the future of Britain's booze aisles.

That's the message from this year's Britain's Biggest Alcohol Brands top 100 ranking. The age of piling them high and selling them cheap is well and truly over. It's a far cry from the 4% lager-soaked days of yore. And it's got nothing to do with these supposed 'snowflake' millennials that certain tabloids claim just can't hack their grog any more.

Yes, Brits are drinking less. Overall volumes of the top 100 brands have fallen by almost 14.8 million litres. A legion of pints, drams and consolatory glasses of wine have been turned down over the past 12 months.

But that's not strictly bad news. Because while Brits might be displaying more moderation with how much they're glugging down, they're spending a considerable amount more cash when they do: combined sales of the top 100 have actually grown £349m to £9,420m.

Which has proved deadly for a whole host of mainstream and value brands across the BWS spectrum that used to make a killing thanks to their low price, such as Foster's (4), Hardys (7), and Glen's (19). Meanwhile posher (and craftier) brands like Estrella Damm (65), Thatchers (46) and the unstoppable BrewDog (40) are raking it in. "What we've got is value growing ahead of volume and premiumisation really kicking in while the bottom end is clearing out," says Pernod Ricard UK commercial director Chris Ellis. "If you were to segment the market into premium, mainstream and value, in all categories that slither at the bottom is on the way out.

"Out-and-out value propositions will always have a role to play but their relevance in the market is definitely diminishing because the consumer trend is very much towards the top end."

Still, the picture is far more complicated than consumer tastes simply moving away from cheap towards premium. In many cases, retailer decisions have taken their toll on less pricey booze. Hardys and Foster's, for instance, have faced significant delistings in the mults over the past two years amid rumoured pricing disputes. Retailers are also selling less on promotion, which many value brands have traditionally relied on to shift SKUs at high volumes.

And there are some serious exceptions to the premium rule. Take the performance of Diageo mainstay Gordon's. Craft gin might be making all the headlines with its army of kooky brands, uber-trendy distillers and unflinchingly high price tags, but Gordon's (6), with an average price of £18.13 per litre for the core gin or £20.90 for its massively popular Pink variant, has racked up the greatest gain of any brand in the top 100.

Carling, too, has grown by almost £30m. In spirits, Jack Daniel's (9) has had another stonking year. You'd be hard-pressed to describe any of these brands as high-end. So what's really going on? And who are the new rulers of Britain's BWS aisles? Here's your guide to the key trends driving booze sales in 2018.

Getting experimental

Being brave seems to pay off in today's booze aisles. Pernod Ricard's Ellis ranks experimentation alongside premiumisation as a trend. "NPD and innovation is so important to keeping the category vibrant and, now that it is landing at scale, as a supplier you can have faith that you can do more interesting and different things."

Some of this year's biggest winners

britain's biggest alcohol brands

BRITAIN'S BIGGEST ALCOHOL BRANDS

RANK	up/down	BRAND	SALES (£m)	CHANGE %	CHANGE £m
1	→ 0	Stella Artois	533.3	1.5	8.0
2	→ 0	Smirnoff	485.4	0.0	-0.2
3	↑ 1	Budweiser	418.4	13.3	49.1
4	↓ 1	Foster's	354.2	-11.9	-47.9
5	→ 0	Carling	350.1	8.7	27.9
6	↑ 3	Gordon's	276.5	29.7	63.4
7	↓ 1	Hardys	271.3	-7.2	-20.9
8	↓ 1	Strongbow	266.8	-5.2	-14.6
9	↓ 1	Jack Daniel's	246.1	10.8	24.0
10	→ 0	The Famous Grouse	216.3	2.9	6.1
11	→ 0	Carlsberg	183.9	-11.3	-23.4
12	→ 0	Echo Falls	163.1	-9.0	-16.2
13	→ 0	Blossom Hill	156.7	-10.8	-18.9
14	↑ 2	Kopparberg	150.2	3.5	5.1
15	↑ 5	Barefoot	149.2	18.8	23.6
16	↑ 2	McGuigan	147.6	12.2	16.1
17	↓ 2	Bell's	142.4	-5.8	-8.8
18	↑ 1	Corona	139.2	10.6	13.4
19	↓ 5	Glen's	136.4	-9.8	-14.7
20	↑ 2	Peroni	134.5	10.4	12.6
21	→ 0	Russian Standard	130.3	4.6	5.8
22	↓ 5	Kronenbourg 1664	127.6	-4.1	-5.4
23	↑ 1	Casillero del Diablo	126.3	8.2	9.5
24	↑ 1	Captain Morgan	123.2	6.7	7.8
25	↑ 1	Baileys	120.5	11.8	12.7
26	↑ 1	San Miguel	119.5	13.3	14.0
27	↑ 6	Yellow Tail	118.7	26.9	25.2
28	↓ 5	Bacardi	111.3	-5.1	-6.0
29	↑ 2	Gallo Family Vineyards	105.1	-1.8	-1.9
30	↑ 2	Campo Viejo	102.2	8.0	7.6
31	↓ 3	Guinness	102.0	0.5	0.5
32	↑ 2	Coors	99.7	14.0	12.2
33	↓ 4	Isla Negra	95.8	-3.9	-3.9
34	↑ 2	Bombay	90.8	15.6	12.3
35	↓ 5	Jacob's Creek	89.0	-9.1	-8.9
36	↓ 1	Beck's	81.1	-7.5	-6.6
37	↑ 1	Wolf Blass	80.5	8.6	6.4
38	↑ 1	Grant's	76.2	8.1	5.7
39	↑ 3	Villa Maria	75.2	15.6	10.2
40	↑ 25	BrewDog	71.2	83.6	32.4
41	↓ 4	Whyte & Mackay	70.7	-5.8	-4.4
42	↓ 1	Heineken	70.3	2.1	1.4
43	↑ 12	I Heart	68.5	36.7	18.4
44	↑ 1	Courvoisier	64.8	8.2	4.9
45	↓ 5	John Smith's	64.5	-8.6	-6.1
46	↑ 8	Thatchers	64.3	34.2	16.4
47	↑ 4	Lindemans	64.1	20.4	10.9
48	↓ 5	Kumala	62.8	4.2	2.5
49	↓ 2	Brancott Estate	60.7	11.9	6.5
50	↓ 6	'Hen'	59.3	-2.8	-1.7

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have been brands that have moved boldly into other categories – particularly cider. Smirnoff's (2) success this year hinged so heavily on its three-strong range of flavoured ciders that, had they not been around to keep it afloat, the overall brand would be in decline. Carling's highest-growing SKU was its Black Fruits Cider rather than lager. And Jack Daniel's (9) cider pulled in almost half the growth of its core whiskey.

"It's natural that these trademarks can exist and be successful in new categories as long as they bring something a bit different to it," says Diageo off-trade sales director Guy Dodwell.

Even the wine world – famously averse to innovation – is getting a bit more experimental. Echo Falls, for instance, has moved its popular Fruit Fusions range (which is steadily

Who's up?

40 (65) **BrewDog** ↑ **83.6%**

60 (74) **Jim Beam** ↑ **24.2%**

65 (106) **Damm** ↑ **93.2%**

66 (87) **Freixenet** ↑ **36.4%**

99 (-) **Hop House 13** ↑ **244.4%**

outgrowing its core wine) into vodka, while Jacob's Creek has unleashed a premixed 'Aperitivo' cocktail to rival Aperol.

Have we hit peak gin?

It will come as no surprise that craft gins have racked up some impressive gains. The likes of Greenall's (61), along with Hendrick's (up 24% to £19.3m), Opihr (up 93.3% to £10.3m) and Sipsmith (up 78.6% to £9.6m) are selling like there's no tomorrow, and all stand a strong chance of entering the top 100 in years to come.

"A massive amount of the growth in gin in particular is coming from brands that are either brand-spanking new to the market, or ones that have been around a while but are now generating a bit of scale," says Ellis.

But behind the scenes, many in the trade are beginning to suspect we have reached 'peak' gin for smaller players. That the biggest innovations in gin over the past six months have all been coloured, flavoured gins, gin liqueurs and RTDs suggests newer clear gins may be entering a crowded market.

"I think the fizz in the gin & tonic

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britain's biggest alcohol brands

BRITAIN'S BIGGEST ALCOHOL BRANDS

RANK	up/down	BRAND	SALES (£m)	CHANGE %	CHANGE £m
51	↑ 2	Absolut	58.0	11.0	5.8
52	↑ 6	Tennent's (excl Super)	57.3	−2.1	-1.3
53	↓ 1	Three Barrels	55.7	5.4	2.9
54	↓ 5	Magners	52.6	−0.7	-0.3
55	↑ 2	Westons	50.5	12.4	5.6
56	↑ 17	Tanqueray	50.4	50.7	17.0
57	↓ 7	Oyster Bay	48.2	−9.2	-4.9
58	↓ 2	Desperados	45.9	−0.1	-0.1
59	↓ 1	Moët & Chandon	44.5	1.0	0.4
60	↑ 14	Jim Beam	44.2	24.2	8.6
61	↑ 11	Greenall's	44.1	31.3	10.5
62	→ 0	Oxford Landing	42.4	7.8	3.1
63	↓ 3	Rekorderlig	39.8	0.2	0.1
64	↓ 1	Lambrini	39.7	2.6	1.0
65	↑ 41	Estrella Damm	39.6	93.2	19.1
66	↑ 21	Freixenet	38.3	36.4	10.2
67	↓ 1	Canti	38.0	2.6	1.0
68	↓ 7	WKD	37.1	−6.5	-2.6
69	↑ 12	Jameson	37.0	17.6	5.5
70	→ 0	Martini	36.7	4.4	1.6
71	↑ 12	Trivento	36.2	20.2	6.1
72	↑ 4	Tyskie	35.6	9.4	3.1
73	↓ 6	Cobra	35.6	−3.6	-1.3
74	↓ 15	Pimm's	35.4	−15.3	-6.4
75	↓ 27	Bulmers	34.6	−36.1	-19.6
76	↓ 12	Calvet	34.4	−12.4	-4.9
77	↓ 9	Malibu	34.4	−3.7	-1.3
78	↓ 1	Hobgoblin	34.2	6.3	2.0
79	↓ 8	Chekov	34.0	7.4	2.4
80	↑ 15	Birra Moretti	33.6	28.7	7.5
81	↓ 1	Southern Comfort	32.9	1.2	0.4
82	↓ 4	Disaronno	32.8	1.5	0.5
83	↑ 3	Holsten Pils	31.6	8.4	2.5
84	↑ 1	Veuve Clicquot	30.7	4.0	1.2
85	↓ 6	Frosty Jack's	30.5	−3.6	-1.1
86	↑ 5	Buckfast	30.4	13.5	3.6
87	↓ 5	Torres	30.1	−2.4	-0.7
88	↓ 19	Lanson	29.6	−15.9	-5.6
89	↑ 4	Glenfiddich	29.1	10.9	2.9
90	↑ 4	Sharp's	27.9	6.3	1.7
91	↑ 5	First Cape	27.0	2.8	0.7
92	↓ 8	Black Tower	26.1	−2.6	-0.7
93	↑ 11	The Ned	26.0	20.5	4.4
94	NEW	Valdo	26.0	−4.9	-1.3
95	↓ 5	Jägermeister	25.8	−5.1	-1.4
96	↑ 5	Greene King	24.1	7.7	1.7
97	→ 0	Cono Sur	23.9	−1.9	-0.5
98	↓ 6	High Commissioner	23.6	−17.4	-5.0
99	NEW	Hop House 13	23.2	244.4	16.5
100	↓ 11	Mud House	22.9	−12.4	-3.2

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industry may go flat," says one senior industry source. "The market can't actually sustain this many of them and, to be honest, quite a lot of them aren't very good – especially if you're having it made for you by somebody in Birmingham under cover of darkness and then claiming it's a rare, small-batch recipe."

Is whisky the new gin?

Pernod Ricard's Ellis says it could be time to start thinking about a successor to gin's throne. He highlights signs of a burgeoning boom in whisky and the "green shoots" of a craft movement in vodka.

"If I had to take a bet I would go with whisky next. Because it's super versatile and has a wide variety of propositions. Gin has always been a big category but for a long time was

Who's down?

101 (100) **Harveys**	↓	**3.7%**
102 (88) **Amstel**	↓	**21.9%**
106 (99) **Old Mout**	↓	**12.7%**
107 (75) **Viña Maipo**	↓	**41.1%**
146 (98) **Banrock Station**	↓	**40.9%**

declining, however it had enough scale in it that as soon as you began to add something interesting it was easy to grow and develop. Whisky is equally big and in much better health than gin was before the boom."

There are signs of this happening already. The past year has seen a slew of younger whisky brands – often English (such as Cotswolds Distillery or The Lakes Distillery, both of which have launched their first single malts this year) or coming from other non-traditional whisky regions such as Scandinavia or South Africa – hit the market.

Meanwhile, thanks to the current vogue for Americana, bourbon brands such as Jim Beam, which has upped its value sales by almost a quarter, and Bulleit, which is making a serious dent on the craft side of things with value sales of £4.7m this year, are surging.

"Remember," says Ellis, "traditionally consumers would have one bottle of gin in the cupboard at home whereas now they have a range. Flow that through into the buoyant areas of the whisky category and it makes complete sense to have an Irish,

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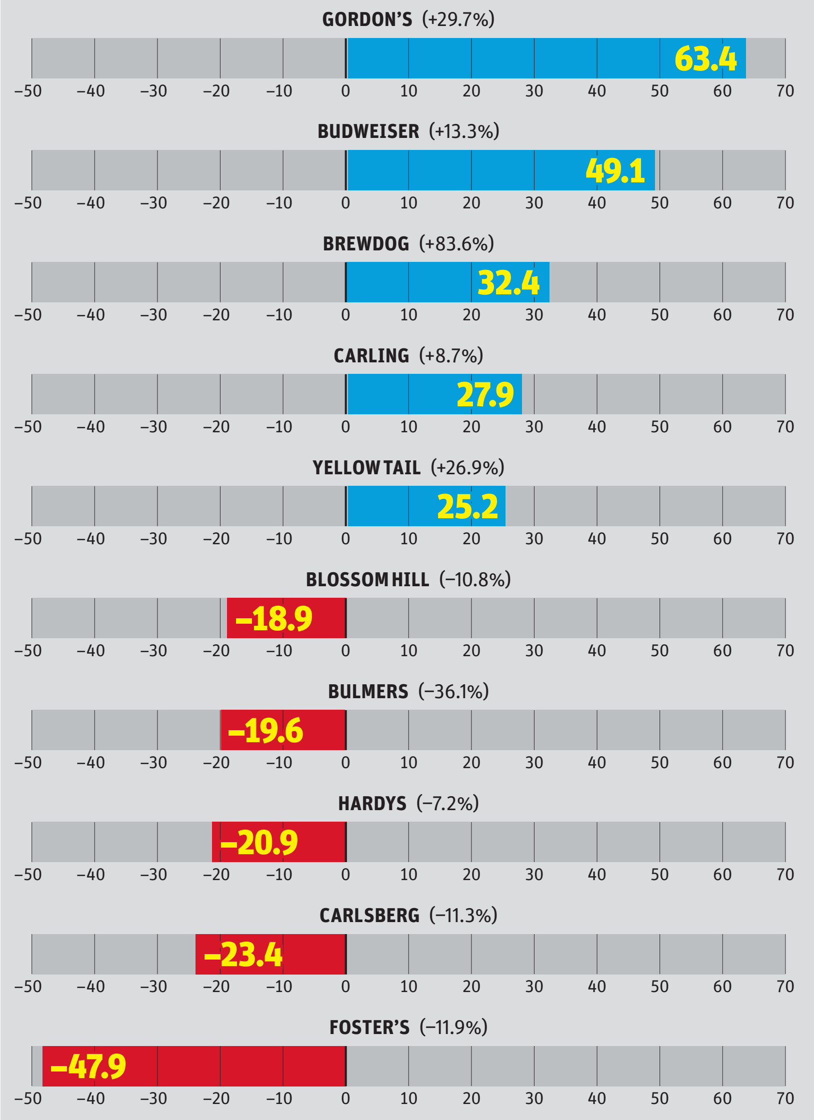
Top ten still wine brands MAT value sales YOY to 23/06/2018

Biggest winners & losers (£m)



Winners & losers: the key trends

● Brits are trading up. Many of the year's most significant gains have gone to brands with a considerably higher average price than category mainstays, such as Estrella Damm and Yellow Tail.

● But that's not the whole story. Gordon's, the UK's biggest gin brand – and an undeniably mainstream one – is 2018's biggest winner, thanks to a stellar performance from both its traditional clear gin and its recently launched Pink variant.

● Booze brands are increasingly crossing into other categories. Carling's gain, for instance, is significant not just because Carling is anything but a premium brand, but because such a significant portion of its growth (a cool £13.2m) has come from Carling Black Fruits Cider, which it launched just last year as a competitor to Strongbow's frontrunner Dark Fruit. Smirnoff, too, has made a killing with its range of ciders.

● Craft beers and spirits (particularly gins) have, predictably, made some of the year's most substantial gains in terms of percentage increases, The unstoppable BrewDog, which has climbed 25 places up the top 100, is now not just the UK's biggest craft beer brand but the UK's 13th biggest beer brand overall.

a bourbon, a Canadian rye for instance in your cabinet."

After smashing its way into the mults last year, craft beer has come of age. BrewDog and Hop House 13 may be the sub-sector's most notable players in the top 100 this year, but there are serious contenders waiting in the wings. Camden Town Brewery, for instance, which was bought by AB InBev in 2015, has upped its value sales by 192.2% to £5.1m – no doubt boosted by the distribution heft commanded by its parent company.

The craft 'big boys'

Craft mainstays are beginning to emerge while those that can't demonstrate long-term growth prospects or product consistency are falling away, says Camden founder Jasper Cuppaidge. "What's interesting to me is that once people have started drinking these beers, they are sticking with them. Very strong brands have appeared within a very short space of time." In short, craft beer's getting its own 'big boys'. "There's always going to be space for innovation and craft, but consumers are going to come back

> **"For all the talk of 'craft' and 'premium', this year's biggest winner in beer is Budweiser, which is hardly high end"**

to the ones that taste fantastic. Working for supermarkets and a wider audience, you have to nail quality and consistency."

Still, the craft market is in rude health: the top 30 craft brands have added an impressive £72.1m to their combined value, an increase of 51.4%. The big boys are more confident than ever in their ability to grow craft to scale: Heineken has acquired a significant stake in London brewery Beavertown and is ploughing £40m into a new brewery for it.

And yet for all the talk of 'craft' and 'premium', this year's biggest winner in beer is Budweiser (3), whose phenomenal growth was accelerated by a storming performance for lower-alcohol Bud Light. Budweiser commands a premium over Foster's and Carlsberg (11), sure, but it's hardly high-end. It's still on average over £1.50 cheaper per litre than Peroni (20), and 13p cheaper than Stella (1).

All of which suggests there isn't a one-size-fits-all secret to making a booze brand work in 2018. If anything, this year's winners have got to where they are by being more flexible than ever. Cheers!

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AB InBev

1 (1)

Stella Artois

SALES: £533.3m **GROWTH:** 1.5%

Five years ago Stella Artois' sales were dropping fast. The brand was suffering from years of being piled high and sold cheap. No one would have imagined that, half a decade later, Stella would be raking in the cash thanks to its "premium" credentials and sponsorships of posh racing events like Ascot and Wimbledon. Or that pubs would be giving away promotional free plates of olives specifically chosen to pair with the brew.

But that's the genius of the marketing machine that is parent company AB InBev. Stella's core lager has added a cool £29.8m to its value to hit £514.8m, which in isolation is one of the year's largest gains.

"We needed to reframe the brand and bring it back to being a premium lager," says Stella Artois marketing director for Europe Alexis Berger.

Hence the tennis, the races and The Open. Stella has just renewed a three-year contract with Ascot that will see it invest "not just in having Stella on site but also investing in infrastructure and redesigning several of the key bars to show up in the most premium way possible". Berger says the brand "had to think about how we make sure that Stella Artois is worth paying a bit extra for".

Because Brits are paying extra: the average price per litre of Stella Artois has risen some 3% over the past year.

These posh events also serve to separate Stella's target audience from that of Carling (5) and Budweiser (3). Indeed, now Bud has overtaken Foster's, it's even more imperative the two InBev brands don't cannibalise each other.

Berger says a key part of its strategy is ramping up Stella's bottled offering – sales of which have been driven by these high-end sponsorships. "The goal is to promote less and feature bottles more, little by little," Berger adds, hinting at a "new core creative idea" that will go live in October this year, with a focus on "bringing us back to our continental sense of place and personality. It will be a big push ahead of Christmas."

Then there's its partnership with Water.org, which saw the brand link up with Matt Damon for a charitable push designed to help get clean water to people in the developing world. Berger says the charitable aspect has actually led to an increase in year-on-year sales. "We were the first to make donation part of our packaging. People really do want to contribute."

All of which means Stella Artois' public image in 2018 is a far cry from what it used to be. There's a caveat, though: Stella's lower-alcohol sister brand Stella 4% and the Stella Cidre portfolio have both had significant chunks of their sales wiped away, with respective losses of £8.6m (roughly half Stella 4%'s value) and £13.3m. This leaves the overall brand with a less impressive value gain of £8m.

Stella 4% has suffered from the same malaise as Foster's (4) and Carlsberg (11). Cheaper, lower-alcohol beers such as Bud Light and Coors (32) have lured more moderate, value-focused drinkers at one end while

> **"The goal is to promote less and feature bottles more"**
>
> *Alexis Berger, AB InBev*

posher, stronger lagers such as Stella standard, Budweiser and Estrella Damm (65) have tempted those at the other end of the spectrum to trade up. Not to mention Stella 4% has disappeared from Tesco.

Berger is noncommittal when it comes to the fate of the lower-abv lager. "Our focus overall is on the main brand. Stella 4% is still part of our portfolio because we want to have the ability to get those consumers who want to moderate a bit more, and we're looking to revitalise the packaging to bring it more in line with where we're going and again, to show that it is still a premium product."

Mid-range ciders like Stella's just aren't where the action's at this year. You only have to look at the gains made by Thatchers (46) and Westons (55) (not to mention the decline of fellow mainstream brand Bulmers) to see the kinds of products that are getting Brits excited.

Stella Cidre has also fallen victim to mass delistings in the supermarkets. This time last year it held 14 listings across the mults. Now it's got six, according to Brand View [52 w/e 22 June 2018] and AB InBev has ditched its consistently under-performing Elderflower SKU. Not to mention it was hit by shrinkflation, when AB InBev slashed the size of its bottles by 12%, dropping them from 568ml to 500ml.

So can Cidre be salvaged? "We're going to see how it goes," says Berger, adding AB InBev is optimistic Cidre will see a summer surge. "It's certainly impacted by seasonality and summer. Over the past few years there has been such an increase of competition in the category, and it doesn't make sense for us to go forward with a big strategy of new flavours. What we have is what we want to keep."

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2 (2)

Smirnoff

SALES: £485.4m **GROWTH:** 0.0%

What on earth is going on with the UK's biggest vodka brand? Its flagship Red Label vodka is down £5.5m, while its trio of Smirnoff ciders are flying off the shelves. In fact, the combined £14.1m sales racked up by Smirnoff's ciders was the only thing that stopped the brand falling into an overall decline (even a solid £2.7m in sales of new Smirnoff Raspberry wouldn't have been able to offset the hero brand's slump).

The success of Smirnoff Cider is testament to Diageo's desire to become a "total beverage alcohol" player, says its off-trade sales director Guy Dodwell. "We've worked hard over the last couple of years to introduce new expressions of some very powerful and strong trademarks – Smirnoff Cider was a great example of something that brought something new to a category."

What's more is that a significant portion of Smirnoff Cider's sales have been incremental, he claims. "We're not interested in just entering categories to drive share steal in the retailers."

It's emblematic of how booze brands aren't sticking to their niches any more, he adds. "The categories are definitely blurring. It's natural that trademarks can exist and be successful in new categories as long as they bring something a bit different to it."

What of Smirnoff Vodka, then? It's been hit by the gin boom, says Dodwell. "Gin looks like it's having some impact on vodka overall, and the category dynamics are not as strong as they have been in the past".

Posher vodkas are exempt, it seems. Pricier rival Absolut (51), for instance, is up £5.8m. Still, Dodwell isn't fazed. After all, Diageo has its own player in the posh vodka arena – Cîroc – which has grown by £2.8m to £15.9m this year (127), even if it's still outside the top 100.

Dodwell won't reveal what the coming year holds for Smirnoff, but admits "there is a level of change and reinvention required". Watch this space.

3 (4)

Budweiser

SALES: £418.4m **GROWTH:** 13.3%

The UK's second biggest-selling beer had a "fantastic" year, says its UK marketing manager Rowan Chidgey. Brits necked an extra 22.2 million litres of Bud, helping it leapfrog Foster's.

"The performance has been helped by its affiliation to big-ticket sporting events throughout the year – as well as the launch of Budweiser Prohibition," Chidgey adds.

While Prohibition racked up a respectable £1.1m in its first six months, the bigger hit was Bud Light, whose sales surged from £4.9m to £35.4m.

Football has been a key driver for Budweiser. Association with the beautiful game has allowed the brand and its retailers "to tap into a captive audience" as 81% of those buying beer to consume at home will be watching sport on TV, according to Chidgey.

4 (3)

Foster's

SALES: £354.2m **GROWTH:** –11.9%

With a crushing £47.9m loss, Foster's has been knocked from its position as Britain's third-biggest booze brand by Budweiser.

Foster's has been battered on every front. It's suffered delistings across all the major mults and now holds fewer than half the number of listings it did this time two years ago [Brand View 104 w/e 21 June 2018].

Meanwhile its mainstream image has fallen out of step with shoppers seeking posher or trendier brews. Parent brewer Heineken may have staged an

impressive comeback in Tesco this year, reclaiming some 30 listings after its year in the wilderness, but Foster's was largely overlooked. And in the face of these headwinds, data suggests the average price per litre of Foster's has risen by a not-insignificant 5.7%.

5 (5)

Carling

SALES: £350.1m **GROWTH:** 8.7%

Carling's core beer has added 3% to its value despite Brits' growing disdain for mainstream domestic lager. The main headline, however, is the rise of the Molson Coors brand's cider. Its Black Fruits variant launched in March 2017, adding £13.2m in value sales over the past 12 months. The Apple cider surged too, rising by 126%.

One reason for this success is the undercutting of big cider-makers. While Strongbow's Dark Fruit is £2.52 a litre on average, Carling's similar drink is £1.97 – and that's

significantly lower than Kopparberg's big sellers, which come in at about £3.50.

Carling's sales will also have been buoyed by the on-pack competition launched in association with the Premier League and Sky Sports, which ran across a variety of its SKUs.

6 (9)

Gordon's

SALES: £276.5m **GROWTH:** 29.7%

Posh gin might be making headlines, but Brits certainly haven't lost any love for the mainstream stuff if the performance of Gordon's is anything to go by. The Diageo brand has added a gargantuan £63.4m to its value – the single largest gain of any brand in the top 100.

Gordon's standard gin is flying. The flagship SKU pulled in some £22m in extra sales in its own right.

But the majority of this added value has come from sales of Gordon's Pink. Despite only launching last summer, its value has already hit £35m – making it a bigger brand in its own right than the likes of Bulmers (75), Hobgoblin (78) and Southern Comfort (81).

The secret, says Diageo off-trade sales director Guy Dodwell, is its simplicity (and price). "It is very accessible and it's brought a huge number of non-traditional gin drinkers into the category.

"A lot of innovation is always coming in through the premium segment, so we deliberately innovated in that standard segment because we believed there was a scale opportunity."

Diageo certainly isn't the first to make pink gin. Upmarket brand Pinkster, for instance, has been around since 2013. But it was the first to do it at a mainstream price point: Gordon's Pink costs an average price per litre of £20 (roughly £16 for 70cl).

The impact of the NPD shouldn't be understated. Dodwell says Diageo has had to significantly ramp up production to keep up with demand, and a vast swathe of competitors have already unveiled their own pink gins (or pink gin liqueurs), such as Beefeater and JJ Whitley.

"I think pink gin will be a sustainable category in its own right," says Dodwell.

Diageo has since moved Gordon's Pink into RTD cans with Schweppes tonic, which hit shelves in February, and the early omens are good: sales have already hit £400k.

Plus, Gordon's has targeted the low and no-alcohol sector with the launch of two 0.5% abv premixed G&Ts. Diageo cited a "real unmet demand from consumers for a credible low or non-alcoholic gin alternative".

Whether Gordon's can make its mark on 'no & low' remains to be seen. But if its recent successes are anything to go by, virtuous booze could be in for a shake-up of its own.

9 (8)

Jack Daniel's

SALES: £246.1m **GROWTH:** 10.8%

Jack Daniel's has been on a roll since overtaking The Famous Grouse (10) in 2016 to become Britain's favourite whisky brand. The Brown-Forman-owned tipple has added £24m to its value, raking in the sixth-largest gain of any brand in the top 100, and the second highest gain for any spirit behind Gordon's (6). Like Smirnoff (2), a significant portion of this growth (£4.5m) came from the rampant success of its foray into cider. It may have launched just last year, but Brits have already shelled out for 860,000 litres of Jack Daniel's Tennessee Cider, which is further proof of the potential in 'crossover brands'.

Still, the star of the show was JD's core whisky, which has grown by £8.9m to £163m. Jack Daniel's Honey, meanwhile, is up £2.7m to £34m. That both dipped in price this year can't have hurt. But Jack Daniel's is also looking outside its core lines. Capitalising on growth in canned premixes, the brand's Jack Daniel's & Cola RTD sold an extra £1.8m, reaching £21.7m – making it the year's highest-grossing canned RTD (ahead of Gordon's G&T, whose value hit £17.7m).

Spurred on by the success of its newer variants, the brand has added a new 45% abv rye whiskey to its core lineup since last year's ranking. The style has become the "rising star of the whiskey industry", claims JD marketing manager Ffion Fitzgerald. "Whilst it remains a relatively small market, it has seen significant growth over the last five years, with almost 20,000 nine-litre cases sold in Europe in 2016 alone, of which nearly 8,000 were sold in the UK, making it the number one rye market in Europe." The omens are good: since launching in October, it's pulled in £600k in sales.

Jack Daniel's is well aware of how important on-trade visibility has become: it has spent past months building brand awareness in the on-trade and launched 'Tennessee Nitro Tours', which saw brand ambassadors touting the benefits of the 'Tennesse Nitro Martini' cocktail, with an eye to boosting the brand's status as a cocktail ingredient.

It also threw its support behind the independent music industry, partnering with the Music Venue Trust to host a three-date mini 'Homecoming' tour.

7 (6)

Hardys

SALES: £271.3m **GROWTH:** –7.2%

The UK's number one wine has a "breadth of appeal and appropriate price, and quality for numerous and varied occasions" says David White, marketing director for owner Accolade Wines. Yet even these attributes couldn't stop the brand shedding £21m last year.

The slump in value, coupled with a 9.4% dive in volumes, was "down to a trading dispute, pure and simple" an industry source told The Grocer at Christmas. "Hardys has had 600,000 cases taken out of Sainsbury's."

Its problems were exacerbated by Brits losing interest in mid-market vino. A rise in average price won't have done it any favours, either.

Nevertheless, White insists the performance "is in line with our expectations and ahead of our internal measures".

8 (7)

Strongbow

SALES: £266.8m **GROWTH:** –5.2%

The UK's favourite cider is worth £14.6m less than last year. Most of that loss is down to the decline of Strongbow's Original variant as the UK's drinkers turned to craft and flavoured ciders.

That trend is why the brand's Dark Fruit variant (which added a five-litre mini-keg in the spring) is very much on the up – by £7.8m (8.6%).

"With the appetite for flavoured cider and premium apple alternatives on the rise, Strongbow is a brand that is evolving with the landscape,"

says Toby Lancaster, category & shopper marketing director at owner Heineken.

This summer sees Strongbow sponsoring "some of the UK's biggest festivals", supported by on-pack promotions – and Lancaster predicts a strong showing from Original.

10 (10)

The Famous Grouse

SALES: £216.3m **GROWTH:** 2.9%

Despite shoppers' growing indifference to blended whisky – with vodka now the nation's favourite hard stuff – The Famous Grouse has added £6.1m to its value over the past 12 months.

Seeing as volumes are up just 0.2%, most of that extra cash is the result of inflation. Nevertheless, the brand's average price per litre is still 22p lower than chief rival Bell's (17).

"One of the key reasons The Famous Grouse continues to enjoy growth within a declining category is its strong and loyal

fan base", says Chris Anderson, head of brands at Edrington Portfolio, Edrington-Beam Suntory UK. "Consumers love to see our iconic TV advertising."

The brand has just launched its first NPD in years, Bourbon Cask, the first in a new series that's "a little bit different".


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britain's biggest alcohol brands

15 (20)

Barefoot

SALES: £149.2m **GROWTH:** 18.8%

Barefoot added an incredible £24.6m to its value last year as British shoppers grabbed an extra 2.2 million litres off the shelves. That makes it the second fastest-growing wine in our top 100.

This is despite being considerably more expensive than its closest competitors, McGuigan (16), Blossom Hill (13) and Echo Falls (12), underlining Brits' desire for more premium vino.

"Barefoot is the world's number one bottled wine brand by sales revenue," says Olga Senkina, EMEA marketing director at owner E&J Gallo Winery.

The Californian tipple "is really stamping its footprint this side of the Atlantic", she adds.

"With a wide range of wines available in the UK, Barefoot's range includes the UK's number one pinot grigio, merlot and pink moscato."

More recent additions to the range have seen some success, too. "Launched in 2016, Barefoot Malbec is already the number two malbec in the UK," says Senkina.

"Barefoot has always marched to the beat of its own grape, engaging consumers and loyal fans through exciting marketing campaigns and a relaxed approach to wine."

Promotional activity includes experiential marketing and a tie-up with Pride festivals across the UK, having been an ally of the LGBTQ+ community for 30 years.

11 (11)

Carlsberg

SALES: £183.9m **GROWTH:** –11.3%

Thanks to a massive media push and relaunch playing up its Danish credentials, Carlsberg's Export brand has held on to value. A similar rethink of Carlsberg 'Green' (down £20.8m) is in the works.

12 (12)

Echo Falls

SALES: £163.1m **GROWTH:** –9.0%

The official wine of ITV2's Love Island has struggled as Brits turn away from mid-market vino to more premium brands. Not even November's surprise divergence into vodka could stop volumes diving 11. 7%.

13 (13)

Blossom Hill

SALES: £156.7m **GROWTH:** –10.8%

Blossom Hill's down £18.9m due to competition from premium wines. Still, Treasury Wine Estates insists the brand's decline has slowed. This year it is hoping to ride the wave of interest in drier, lighter rosés.

14 (16)

Kopparberg

SALES: £150.2m **GROWTH:** 3.5%

The Swedish cider brand has raked in an extra £5.1m over the past year due to a steady influx of NPD, from a super-premium rosé cider to a blueberry & lime variant and a raspberry extension to its Light lineup.

16 (18)

McGuigan

SALES: £147.6m **GROWTH:** 12.2%

Another year of strong growth for the Aussie brand was marked by the rollout of the 2016 vintage of its Bin 9000 Semillon into Asda and the overhaul of both McGuigan's Classic and Black Label ranges.

17 (15)

Bell's

SALES: £142.4m **GROWTH:** –5.8%

Bell's has seen volumes slip by nearly 8%. Lack of NPD and Brits' waning interest in blended whisky won't have helped, plus it is more than 20p a litre pricier on average than rival The Famous Grouse (10).

18 (19)

Corona

SALES: £139.2m **GROWTH:** 10.6%

The impressive rise in value of Corona (£13.4m) will be down in part to Brits' growing love of 'world' beers. In spite of a modest increase in average price, the Mexican lager shifted 7.1% more in volume.

19 (14)

Glen's

SALES: £136.4m **GROWTH:** –9.8%

Brits are drinking less, but more premium. That spells bad news for value brands like Glen's vodka, which are getting left out in the cold. Its sales are down £14.7m – the seventh-biggest loss of any brand this year.

20 (22)

Peroni

SALES: £134.5m **GROWTH:** 10.4%

Owner Asahi UK's efforts to play up Peroni's "super-premium" status and position it alongside top-end chefs and restaurants seem to have paid off, as the brand added an extra £12.6m to its value.

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britain's biggest alcohol brands

25 (26)

Baileys

SALES: £120.5m **GROWTH:** 11.8%

Flying in the face of almost every current booze trend, Diageo's cream liqueur has grown to add an impressive £12.7m to its value. This is thanks, in part, to Diageo repositioning the brand as an 'Instagrammable' cocktail ingredient, says off-trade sales director Guy Dodwell. "We have done a lot of shopper-based work, putting different, more exciting serves in front of them. And that has driven a reappraisal of the original trademark."

But it's outside Baileys' traditional base where Diageo has done perhaps its most interesting work. This year saw the launch of Baileys Almande – a dairy-free, vegan version of the drink – into Whole Foods Market, followed by a wider rollout into the mults. "The packaging is excellent and we've managed to build strong distribution in the trade," says Dodwell. "We've worked hard to understand the role product can play in the free-from category, because it puts us in front of a whole new range of shoppers and occasions."

Meanwhile Baileys has continued to pump out "less seasonal" variants in an effort to turn the brand into an all-year-round proposition. The omens are good: its canned Iced Coffee RTD was its second best-performing SKU this year, upping its value by £2.1m to £2.3m. Its latest SKU, the limited edition Strawberries & Cream, hit shelves in June.

21 (21)

Russian Standard

SALES: £130.3m **GROWTH:** 4.6%

While behind rivals Smirnoff (2) and Glen's (19), Russian Standard is the only vodka of the three in growth, adding a respectable £5.8m – despite being markedly more expensive than Diageo's category leader.

22 (17)

Kronenbourg 1664

SALES: £127.6m **GROWTH:** −4.1%

Kronenbourg recently returned to Tesco but the effects of the retailer's 2017 cull are still being felt. Brits' thirst for craft beer will have also contributed to its slump in volumes: it sold almost six million fewer litres last year.

23 (24)

Casillero del Diablo

SALES: £126.3m **GROWTH:** 8.2%

Brits' appetite for South American wines shows no sign of abating. Casillero del Diablo has added a cool £9.5m to its value. It recently unveiled 'Diablo', a posher (and pricier) 'dark red' blend.

24 (25)

Captain Morgan

SALES: £123.2m **GROWTH:** 6.7%

Captain Morgan has become the UK's favourite rum with a little help from his friends. A TV ad featuring Rio Ferdinand and a host of UK sports stars helped add £7.8m to its value and push volumes up 6.2%.

26 (27)

San Miguel

SALES: £119.5m **GROWTH:** 13.3%

Brits downed an extra 4.4 million litres of the Spanish lager last year, adding £14m to the brand's value. A Sainsbury's listing for its 0% variant helped, as did the launch of a new gluten-free option into Tesco.

27 (33)

Yellow Tail

SALES: £118.7m **GROWTH:** 26.9%

Premiumisation is paying off for posher wines like Yellow Tail, which has racked up an extra £25.2m in value sales. That's the year's fifth-biggest gain, and the single biggest gain for any wine brand.

28 (23)

Bacardi

SALES: £111.3m **GROWTH:** −5.1%

Rum may have been tipped as the next major trend, but that hasn't translated into any extra sales for Bacardi – value is down £6m. It's hoping to change that with its new sipping rum Bacardi Anejo Cuatro.

29 (31)

Gallo Family Vineyards

SALES: £105.1m **GROWTH:** −1.8%

Eyeing millennials, Gallo last year expanded its fruity Spritz sub-range with a Wild Strawberry variant. The move paid off – value is up 14% – but its core wine is declining again after showing signs of recovery.

30 (32)

Campo Viejo

SALES: £102.2m **GROWTH:** 8.0%

Pernod Ricard wants to add to Campo Viejo's £7.6m of extra sales (and 6.4% volume increase) by building on the success of its Reserva Art Series bottle, a collaboration with artist community Talenthouse.

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britain's biggest alcohol brands

40 (65)

BrewDog

SALES: £71.2m **GROWTH:** 83.6%

All hail the 'Dog. Craft beer's undisputed king has racked up a monstrous £32.4m extra value sales this year, the second-biggest gain of any beer brand after Budweiser (3) and the third-biggest gain in the top 100. Of course, whether James Watt's Aberdeenshire upstart can hang on to its craft credentials having sold 22% of the business to a US private equity firm is questionable to say the least, but, as these latest sales figures show, consumers don't seem to care.

Punk IPA (which is up £13.8m to £37.7m in sales) is, predictably, responsible for the biggest chunk of BrewDog's growth. But its other SKUs have made serious gains too: Dead Pony Club ale is up £4.4m to £9.5m, almost doubling in value. Elvis Juice IPA has more than tripled its value, which hit £7.6m, and Nanny State, its 0.5% abv brew, grew nearly £2m to £3.6m.

In the past 12 months alone, it launched a direct-to-consumer 'beer club', kicked off a million-pint sampling campaign, mounted a £50m crowdfunding drive and made two significant acquisitions: 'urban cider' brand Hawkes and London bar chain Draft House. It's also set its sights on global domination with a new brewery in the US and one in the works for Australia.

If BrewDog continues its assault on the BWS aisles, who knows how far up the top 100 it could climb?

31 (28)

Guinness

SALES: £102.0m **GROWTH:** 0.5%

The March launch of Open Gate Citra IPA and Open Gate Pilsner came too late to help Guinness do more than stagger into the black. It added just £0.5m despite being the official beer of Six Nations Rugby.

32 (34)

Coors Light

SALES: £99.7m **GROWTH:** 14.0%

That Coors Light has added £12.2m to its value despite such steep competition from Bud Light (which is also roughly 15p cheaper on average per litre) is testament to the sheer power of the lower-alcohol trend.

33 (29)

Isla Negra

SALES: £95.8m **GROWTH:** –3.9%

A promotional tie-up with Pizza Express couldn't prevent Isla Negra from losing £3.9m as Brits necked 750,000 fewer litres of the Chilean wine, which was featured in the first Londis Wine Festival last summer.

34 (36)

Bombay

SALES: £90.8m **GROWTH:** 15.6%

Bombay's Sapphire core line shot up £15.8m, more than making up for the £3.5m drop in sales of its Dry Gin. That gain wasn't just down to increasing the price of its 70cl bottle – volumes also grew 11.4%.

35 (30)

Jacob's Creek

SALES: £89m **GROWTH:** –9.1%

Having suffered an £8.9m blow to sales, Jacob's Creek is looking outside whites and reds for growth. As well as launching Le Petit Rosé, it recently moved to tap the cocktail trend with a pre-mixed Aperitivo Spritz.

36 (35)

Beck's

SALES: £81.1m **GROWTH:** –7.5%

Holding the number one spot for alcohol-free beer didn't stop Beck's slipping down the ranks, with 9.1% volume losses and a £6.6m drop in value sales, more than three times what it gained last year (£1.8m).

37 (38)

Wolf Blass

SALES: £80.5m **GROWTH:** 8.6%

A TV campaign celebrating the history of Wolf Blass boosted sales back in November, as did the return of the brand's Limited Edition Rugby Labels. It is following this up with a focus on cricket sponsorship.

38 (39)

Grant's

SALES: £76.2m **GROWTH:** 8.1%

Following a steep drop in value last year, Grant's has turned itself around. The brand is back in growth and keen to keep momentum going with a global relaunch and range refresh set to make waves in July.

39 (42)

Villa Maria

SALES: £75.2m **GROWTH:** 15.6%

Villa Maria is up £10.2m, bolstered by the success of its Private Bin Sauvignon Blanc, now the number one selling sauvignon blanc in the UK, and easy-to-navigate ladder of quality tiers.

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46 (54)

Thatchers

SALES: £64.3m **GROWTH:** 34.2%

Thatchers has racked up an extra £16.4m in value sales this year, the biggest gain for any cider brand. Its flagship cider, Gold, is up £10m to £44m, Vintage is up £1.0m to £4.4m, and Haze has grown by £5.3m to £9.2m. The brand's off-trade sales director, Chris Milton, says this is proof of the potential of premium.

Thatchers has been busy on the NPD front this year, too. It's launched a new five-litre keg of Gold, which Milton says has had "amazing take-up in Tesco". There's also a new sparkling apple wine, Thatchers Family Reserve, which the brand is billing as an alternative to prosecco, and the addition of a new 7.4% Summer Vintage cider to its seasonal range in Tesco.

This summer the brand is taking a sampling truck on the road to sports events and festivals with an eye to getting its drinks in front of a wider audience and showing off the brand's history and heritage. It's also embarked on a massive outdoor 'thermal' campaign, with billboard and rail station ads that only go live when the temperature 'hits a perfect British summer day'.

Meanwhile, it's moved to make its packaging more sustainable over the past year. "We've been reducing our use of single-use plastic and in particular have introduced recyclable cardboard duo-wing packs for our cans of four," says Milton.

41 (37)

Whyte & Mackay

SALES: £70.7m **GROWTH:** –5.8%

After another year of falling sales (down £4.4m), Whyte & Mackay is pinning its hopes on new 50cl blended whisky bottles, launched in May as a response to minimum unit pricing in Scotland.

42 (41)

Heineken

SALES: £70.3m **GROWTH:** 2.1%

Heineken's up £1.4m thanks to its alcohol-free variant, which has racked up an extra £4.1m in sales – offsetting a £2.7m decline for the full-strength lager. Heineken also made its debut in 440ml cans this year.

43 (55)

I Heart

SALES: £68.5m **GROWTH:** 36.7%

An extra £18.4m has netted I Heart the third largest gain of any wine in the top 100. The 'straight-talking, great-tasting' brand has benefited from the move away from mainstream wine towards posher plonk.

44 (45)

Courvoisier

SALES: £64.8m **GROWTH:** 8.2%

An 8.7% increase in volumes drove up Courvoisier's value by £4.9m. It maximised its premium credentials with the launch of Fontainebleau – an Amazon-exclusive, oak-finished Cognac – at the end of last year.

45 (40)

John Smith's

SALES: £64.5m **GROWTH:** –8.6%

Continued investment hasn't put a stopper on John Smith's downward spiral. As craft ales continue to steal share, Smith's will need to get innovative if it's going to save itself from falling further into the red.

47 (51)

Lindeman's

SALES: £64.1m **GROWTH:** 20.4%

Lindeman's has focused on sub-brand Bin Series this year. Promotional strategies have helped it grow £6.5m, among them an online promo offering a free half bottle of Bin 45 when purchasing a rival brand bottle.

48 (43)

Kumala

SALES: £62.8m **GROWTH:** 4.2%

Despite a declining South African wine category, Kumala returned to growth, bolstered by its premium Kumala Reserve range (up 74% in sales year on year). Kumala launched its first 50cl bottles in spring.

49 (47)

Brancott Estate

SALES: £60.7m **GROWTH:** 11.9%

Brits' posher tastes have played right into Brancott's hands this year. Despite slipping two places in the BBAB rankings, the brand saw impressive growth in both value (£6.5m) and volume (11.2%).

50 (44)

Hen

SALES: £59.3m **GROWTH:** –2.8%

Traditional ale brands have suffered as yet more shelf space was dedicated to insurgent craft brewers over the past year, and Hen is no exception. The long-standing Greene King brand is down £1.7m.

51 (53)

Absolut

SALES: £58.0m **GROWTH:** 11.0%

Absolut combined trend-led NPD with social justice this year, launching a craft range alongside an LGBTQ+ campaign. The brand attributes much of its growth to consumers trading up.

52 (46)

Tennent's

SALES: £57.3m **GROWTH:** −2.1%

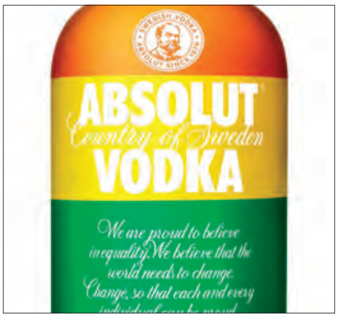
'Scotland's favourite pint' may have lost itself a few popularity points with its support of MUP. The brand has been busy launching new formats and a new can design, but none of this prevented sales dropping £1.3m.

53 (52)

Three Barrels

SALES: £55.7m **GROWTH:** 5.4%

The French brandy is up nearly £3m on volumes up 1.7%, though this came entirely from the brand's original bottles (up £3.6m). Both Three Barrels Honey and XO 15yr variants lost value this year.



54 (49)

Magners

SALES: £52.6m **GROWTH:** −0.7%

Magners' spotlight has been stolen by posher bottled ciders. Rather than compete with heritage brands, it has set its sights on stealing share from Strongbow (8) with its own Dark Fruit cider.

55 (57)

Westons

SALES: £50.5m **GROWTH:** 12.4%

Growth in craft and fruit ciders has given Westons a £5.6m boost. The brand has heavily invested in Stowford Press with a makeover of its low-calorie SKU, a TV ad and on-trade launch of Mixed Berries.

57 (50)

Oyster Bay

SALES: £48.2m **GROWTH:** −9.2%

After seeing £3m wiped off its value in 2016, sales sank by a further £4.9m for Oyster Bay. The super-premium brand will launch new pinot gris bottles from August in an attempt to reverse its decline.

58 (56)

Desperados

SALES: £45.9m **GROWTH:** −0.1%

Sales of Britain's biggest 'speer' (that's 'spirit beer' for the uninitiated) were dragged down by a £1.9m drop for its 'Red' variant. Its core drink, however, grew 4.5% in value, taking sales from £43.1m to £45m.

59 (58)

Moët & Chandon

SALES: £44.5m **GROWTH:** 1.0%

Price was the key factor behind the £400k gain for the UK's top-selling champers brand. Like rival Veuve (84), the brand battled with flat volumes as shoppers swapped champagne flutes for prosecco and gin.

60 (74)

Jim Beam

SALES: £44.2m **GROWTH:** 24.2%

Bourbon sales are surging thanks to the US tipple's accessibility and mixability: Jim Beam is up £8.6m. That's the second-largest gain of any whisky brand, behind frontrunner Jack Daniel's (9).

56 (73)

Tanqueray

SALES: £50.4m **GROWTH:** 50.7%

Even for a gin brand, Tanqueray has come a long way. The premium brand has jumped nearly 100 places since 2015, when it was ranked at number 125 on this list. It has racked up more than 50% growth for the past two years consecutively, with total sales this year climbing £17m. That's a higher absolute growth than the second-biggest gin brand, Bombay Sapphire (34), which racked up an extra £12.3m in value.

Its flagship London Dry Gin was the star of the show, generating £13.1m in extra sales alone. But its variants also performed well. Tanqueray Rangpur's new bottle design helped increase value over 500% to £1.9m.

No Ten is also on the up. The brand took aim at foodies with the launch of its No Ten supper club in January, collaborating with TV chef Gizzi Erskine to create experimental dining experiences with branded gin and tonics and cocktails. The venture seems to have paid off, as the past year heralded an extra £2.1m in sales for the No Ten variant.

Keen to expand its portfolio, Tanqueray also launched two new SKUs in April and May. Crafted from Seville oranges, Tanqueray Flor de Sevilla was first to hit retail shelves and has since taken £200k at the tills. Limited edition botanical flavour Tanqueray Lovage followed a month later.

If Tanqueray's growth continues at this pace, Bombay Sapphire had better watch out.

65 (106)

Estrella Damm

SALES: £39.6m **GROWTH:** 93.2%

Olé! Posh Spanish lager Estrella Damm has smashed its way into the top 100, having almost doubled its value sales this year to grow by a whopping £19.1m.

This is largely thanks to Damm's bold playing up of its 'premium' credentials and linking with top-end gastronomy, sponsoring events such as the National Restaurant Awards and Top 50 Gastropubs. According to the brand, its classy 'La Vida Nuestra' above the line campaign featuring Game of Thrones star Peter Dinklage has been watched by "a quarter of the adult population" in the past month.

"Consumers are drinking better, not more, and are looking for more experiences at home," says Howard Dix, off-trade sales director at Marston's, which distributes Damm in the UK. "Estrella Damm is a brand that is perfectly positioned to take advantage of this."

In the supers, Damm has recently launched six-packs of 330ml cans and bottled 12-packs, which Dix says have pulled in incremental sales.

Of course, Damm is yet to reach the size of its closest rivals San Miguel (26) and Peroni (20), but the sheer amount of cash Brits have splashed out on posh Mediterranean lagers this year suggests there's room in the market for Damm to stay on its upward trajectory.

61 (72)

Greenall's

SALES: £44.1m **GROWTH:** 31.3%

It's been another year of stellar growth for the gin brand, buoyed by numerous launches including a pink Wild Berry flavour and two gin liqueurs. This year, the brand will focus on communicating its history.

62 (62)

Oxford Landing

SALES: £42.4m **GROWTH:** 7.8%

The new River Crossing range was behind the £3.1m boost to Oxford Landing's sales this year. The two-strong range has made £4m since launching last September, while the brand's standard range lost £0.9m.

63 (60)

Rekorderlig

SALES: £39.8m **GROWTH:** 0.2%

After pulling in 18.6% value growth last year, the team at Rekorderlig may be feeling dispirited this time around. Strawberry & Lime added an extra £2m but sales of several other lines have slipped.

64 (63)

Lambrini

SALES: £39.7m **GROWTH:** 2.6%

Seasonal bottle wraps and brand partnerships with the likes of Fake Bake have added £1m to Lambrini sales on volumes up 1.8%. Next on the list is the launch of new flavours inspired by retro trends.

66 (87)

Freixenet

SALES: £38.3m **GROWTH:** 36.4%

The cava brand's push into prosecco has paid off. Its first Italian fizz, which launched last May, has already racked up £11.3m in sales, smoothly offsetting a £3.2m decline for its flagship Cordon Negro.

67 (66)

Canti

SALES: £38.0m **GROWTH:** 2.6%

Having raced up the rankings since entering the top 100 back in 2015, Canti's main sparkling business remains effervescent with £1.5m in extra sales. However, still wine value dropped 16.6% (£0.5m).

68 (61)

WKD

SALES: £37.1m **GROWTH:** –6.5%

Alcopops have fallen way out of fashion as canned cocktails made with big-name spirits have taken the RTD aisles by storm. WKD has pinned its hopes on a new trio of 6% abv fruity cocktails.

69 (81)

Jameson

SALES: £37.0m **GROWTH:** 17.6%

The Irish whiskey brand jumped 12 places in this year's ranking, driven by a new focus on recruiting 25 to 34-year-old drinkers with a new range of craft beer barrel finished whiskey and an RTD cans pilot.

70 (70)

Martini

SALES: £36.7m **GROWTH:** 4.4%

Martini has added to its Riserva Speciale range with a new Bitter SKU this year. The brand attributes its £1.6m gain to the rise in cocktail culture and increasing appreciation of lower-abv drinks.

71 (83)
Trivento

SALES: £36.2m **GROWTH:** 20.2%

Britain's thirst for Argentinian malbec is unquenched, as Trivento's 16.3% volume gain makes clear. The Concha y Toro brand's growth also reflects drinkers' growing willingness to trade up to a pricier bottle.

72 (76)
Tyskie

SALES: £35.6m **GROWTH:** 9.4%

A rise in prices hasn't stopped Britain's bestselling Polish lager racking up 4.8% volume growth, as it remains relatively cheap compared with other world lagers and is popular among Polish expats.

73 (67)
Cobra

SALES: £35.6m **GROWTH:** –3.6%

Cobrahas always ridden on the popularity of Indian restaurants, which is bad news as Brits fall out of love with traditional curries. The rise of posh world brews has only served to increase competition.

74 (59)
Pimm's

SALES: £35.4m **GROWTH:** –15.3%

As craft gins take off, the original gin liqueur is suffering. Volumes have crashed 18.8% amid cuts to the range. Diageo says a new Pimm's O'Clock campaign and a fresh Spritz serve will buck things up.

76 (64)
Calvet

SALES: £34.4m **GROWTH:** –12.4%

Calvet has seen 17.8% of its volumes wiped out. Its woes reflect those of wine brands more generally: a weak pound and tight European crops have squeezed bottom lines, while retailers have cut brand space.

77 (68)
Malibu

SALES: £34.4m **GROWTH:** –3.7%

All Malibu variants bar its sparkling pineapple RTD – up 13.6% to £2.8m – are in decline. The pineapple rum launched in 2016 has dropped 17.7% to £1.6m and the core coconut offering is down 3.2% to £27.8m.

78 (77)
Hobgoblin

SALES: £34.2m **GROWTH:** 6.3%

Hobgoblin's hoppy 'Gold' variant is doing all the heavy lifting. It's added a weighty £2.2m to the brand's overall value and mitigated the fall of the core Hobgoblin beer, down by some £850k.

79 (71)
Chekov

SALES: £34.0m **GROWTH:** 7.4%

Booker's budget vodka is flying thanks to booming sales of 35cl and 20cl bottles. The wholesaler has introduced price-marked packs on its fractionals and says it is allocating growing space in its branches for these formats.

80 (95)
Birra Moretti

SALES: £33.6m **GROWTH:** 28.7%

This Italian lager is Heineken's fastest-growing beer in the top 100, with volumes up 20.4%. Growing sales of premium regional variants Toscana and Siciliana are also helping to drive average prices up.

75 (48)
Bulmers

SALES: £34.6m **GROWTH:** –36.1%

Battered by range rationalisation and facing increased competition from premium bottled fruit ciders such as Kopparberg (14), Bulmers' sales have plummeted £19.5m. That's the year's fourth-largest decline, and the worst performance of any cider in the top 100.

Eight of the brand's 10 SKUs are down: Crushed Red Berries & Lime has fallen £7.6m, while Original has dropped £4.4m. Blueberry & Lime has lost £3.6m and Pear is down £1.6m. Only the brand's duo of Orchard Pioneers ciders – Kier's Cloudy Apple and Sarah's Red Apple – are in growth (though they only racked up a combined £400k).

However, along with a host of other Heineken brands, Bulmers has won back critical shelf space in Tesco (as well as new listings in Asda and Morrisons) over the past three months, which could prove to be Heineken's ace in the hole when it comes to getting Bulmers back in the black.

At brand level the fightback has begun, too. Heineken has relaunched Bulmers Original with a new 'refined, natural' recipe free of any artificial sweeteners and has launched a massive TV campaign with comedian Jessica Knappett (of Drifters and The Inbetweeners Movie fame) on Channel 4. Heineken cider director Emma Sherwood-Smith says it reinforces Bulmers' "British credentials" and will tap shoppers looking to live healthier lifestyles.

86 (91)

Buckfast

SALES: £30.4m **GROWTH:** 13.5%

Buckfast may still take flak in the press for its association with violence and problem drinking north of the border, but its sales manager Stewart Wilson stresses perceptions of the drink are changing. That's thanks to years of trying to reposition it as a cocktail ingredient or accompaniment to food, he says.

"We've got new establishments in the on-trade that are selling the product as a single serve or as part of a cocktail. The 5cl miniature we launched last year is doing particularly well because consumers that haven't actually tried Buckfast can sample it."

And it's not just Scotland that's gone nuts for the stuff. While it's impossible to directly monitor how many retailers south of the border now stock Buckfast, Wilson says the brand's wholesale distribution looks to be on the up. "There's even an unofficial mobile app now called Find My Bucky and there are more and more outlets showing up on it. We've always had a very loyal following, because the recipe has been consistent and the consumer can still expect the same quality every time they buy.

"Perception has always been a bit of an issue with this brand and people have been a bit negative – up until they actually try the product rather than believe what they're reading about it."

81 (80)

Southern Comfort

SALES: £32.9m **GROWTH:** 1.2%

This time last year, SoCo was down £3.9m. Now it looks like distributor Hi-Spirits might make good on its vow to take the brand "to the next level" with the launch of a 40% abv 'Black' SKU in February.

82 (78)

Disaronno

SALES: £32.8m **GROWTH:** 1.5%

Britain's bestselling almond liqueur is holding its own. Volumes are up 4.5%, helped along by the launch of the RTD Sour, the brand's first foray into the premix market (now worth over £340k at the tills).

83 (86)

Holsten Pils

SALES: £31.6m **GROWTH:** 8.4%

It hasn't advertised for years and it's one of the top 100's pricier bulk lagers. So what's behind the 4.3% volume spike in Holsten Pils? Big gains in wholesale distribution, says distributor Carlsberg.

84 (85)

Veuve Clicquot

SALES: £30.7m **GROWTH:** 4.0%

Britain's big-name champers brands are struggling to keep shoppers interested. Veuve Clicquot has grown its value by £1.2m, but only because its price has gone up: volume sales have slipped into a 1% decline.

85 (79)

Frosty Jack's

SALES: £30.5m **GROWTH:** –3.6%

Frosty Jack's has seen volumes sink by 6.3% as average prices have risen. Iceland's three-litre Frosty is selling for £3.69, up from last year's £3.25 [Brand View]. Still cheap, but fans are looking elsewhere.

87 (82)

Torres

SALES: £30.1m **GROWTH:** –2.4%

The greatest source of Torres' 6.2% decline is its bestselling white Viña Sol, down 3.3% to £20m on volumes down 8.4%. The brand's top red Sangre de Toro, however, is up 6.4% to £6.6m on volumes up 3.7%.

88 (69)

Lanson

SALES: £29.6m **GROWTH:** –15.9%

Of the three champagne brands in the top 100, Lanson has had the steepest rise in average price. As it faces a volume slump of 21.9%, the brand is looking to recoup its £5.6m loss through its Wimbledon tie-up.

89 (93)

Glenfiddich

SALES: £29.1m **GROWTH:** 10.9%

The mults have sold just shy of a million bottles of Britain's biggest single malt, a rise of 11%. It contributed most to Glenfiddich's £2.9m gain, followed by the IPA Experiment, which sold an extra £400k.

90 (94)

Sharp's

SALES: £27.9m **GROWTH:** 6.3%

Nearly all of the brewer's £1.7m growth on volumes up 4% is down to its Atlantic Pale Ale. Flagship Doom Bar only managed a gain of 0.5% to £21.3m, bolstered by four for £6 type deals on 500ml bottles.

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91 (96)
First Cape
SALES: £27.0m **GROWTH:** 2.8%

First Cape is weathering the storm in the wine aisle with regular deals on its bestselling Special Cuvée lines, which are up 41.7% on volumes up 43.4%. Its Light lines, however, are down by more than a fifth.

92 (84)
Black Tower
SALES: £26.1m **GROWTH:** −2.6%

It has lost listings in retailer range resets and cheaper spin-off B by Black Tower, a strong performer a year ago, is now in decline. Volumes are down 6.3% as a result, translating to a £700k fall in value.

93 (104)
The Ned
SALES: £26.0m **GROWTH:** 20.5%

Upmarket Kiwi wine The Ned has made its top 100 debut, adding £4.4m to its value. Impressive, considering it's one of the most expensive wines in the list – a testament to the power of premiumisation.

94 (new)
Valdo
SALES: £26.0m **GROWTH:** −4.9%

Weak harvests and an even weaker pound have left a sour taste in the mouths of cheap wine brands, particularly in prosecco. Valdo is struggling to compete after a base price hike for its core Marca Oro variant.

95 (90)
Jägermeister
SALES: £25.8m **GROWTH:** −5.1%

That Jäger is now shot of the Spice variant it launched in 2014 is a driver of its £1.4m loss. The core line is also down by 3.2% on volumes down 1.5%, with average price diluted by strong growth in larger formats.

96 (101)
Greene King
SALES: £24.1m **GROWTH:** 7.7%

Greene King's flagship IPA may be sinking fast, down 13.3% in value, but sales of its hoppier East Coast IPA have nearly doubled. And its £13.6m Abbot Ale has driven overall volume growth of 9.7% for the brand.

97 (97)
Cono Sur
SALES: £23.9m **GROWTH:** −1.9%

Volumes have slipped by 5.7% for Cono Sur, but higher prices and a fall in deals have insulated value performance. The brand is looking to justify its premium with a new design for its core Bicicleta range.

98 (92)
High Commissioner
SALES: £23.6m **GROWTH:** −17.4%

Budget blended Scotch brand High Commissioner has been undercut by both Grouse (10) and a resurgent Grant's (38). It's dropped almost a fifth of its sales for the second consecutive year, wiping £5m from its value.

100 (89)
Mud House
SALES: £22.9m **GROWTH:** −12.4%

This time last year Mud House was growing at 21.4% – now it's dropped £3.2m. Price looks to have been a key factor: the average price per litre is up 4.9%, while the prices of other Kiwi wines remained stable.

99 (new)
Hop House 13
SALES: £23.2m **GROWTH:** 244.4%

Diageo's crafty Guinness spin-off has added a whopping £16.5m to its value this year. That's the fifth-largest gain of any beer brand.

Diageo's off-trade sales director Guy Dodwell puts this down to having found a magic spot between the two best-performing beer sectors: craft and posh world beers. "We felt from the outset we had something that could successfully bridge the gap," he says. That the launch was preceded by a string of well-received brews from the Guinness Open Gate project (in essence Guinness' craft wing) had helped build credibility, he adds. "It established Guinness as an innovative brewer able to produce interesting beers full of flavour and taste."

Of course, there's also that, as the world's biggest spirits manufacturer, Diageo was able to build mass distribution in the on and off-trade. Indeed, Dodwell says Hop House 13 owes a large portion of its success to the off-trade to its growing availability in pubs and bars – particularly some of the larger, managed chains.

Over the past year, Diageo has added new formats including a 650ml sharing bottle, a 12-pack and debuted Hop House 13 in cans. Diageo's frontrunners may be in spirits, but given the success of its beer and cider brands – Smirnoff's (2) cider trio is up a combined £7.8m – Dodwell says extending further outside its traditional domain will continue to be a priority.

114
Edinburgh Gin

SALES: £18.6m
GROWTH: 558.0%

Talk about zero to hero: this time last year Edinburgh Gin's sales were a measly £2.8m – that's a £15.8m increase. If Edinburgh Gin were in the top 100, that would be the fourth-biggest gain of any spirits brand. Entry into the top 100 looks certain if this rate of growth continues. Recent moves from the brand include the launch of two canned RTDs and a summer marketing campaign.

121
Whitley Neill

SALES: £17.4m
GROWTH: 413.3%

Another standard-bearer for the craft gin movement, Whitley Neill has more than tripled its number of listings in the mults over the past 12 months alone. Not content to rest on its laurels, it's recently extended its portfolio into vodka with the launch of a new 43% abv rye vodka, which has already secured space in Morrisons, Amazon and various wholesalers.

130
Haig Club

SALES: £15.5m
GROWTH: 59.8%

All of Haig Club's growth is down to its cheaper Haig Clubman single grain variant, which is co-owned by the one and only David Beckham. Clubman is up £6.76m while the considerably pricier Haig standard is down almost £1m – proof that there's a market among millennials for more accessible, sweeter whisky styles such as single grain.

119
Finca Las Moras

SALES: £18.0m
GROWTH: 40.4%

Imagine if BrewDog grew up a bit and started making wine. That's essentially what you get with Argentinian brand Finca Las Moras, which has shot up from 147th place, boosted by Brits' current love for rich, South American vinos and listings in Tesco and Sainsbury's. And, despite the arty, expensive-looking packaging, it's cheaper than Casillero del Diablo (23).

133
Rosemount

SALES: £15.4m
GROWTH: 38.2%

Treasury Wine Estates-owned Rosemount has added a cool £4.2m to its value this year, with volumes surging 41.6%. Its Meal Matcher range, designed to pair specifically with different dishes, performed particularly well, growing £2.5m to £4.1m. With listings in Tesco, Asda, Morrisons and Waitrose, Rosemount could be a serious contender in years to come.

Bubbling under

Some of this year's most impressive gains took place outside of the top 100, as a host of new players made their mark. These challengers are getting ready to shed their underdog status

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britain's biggest alcohol brands

112
The Secretary Bird

SALES: £19.1m
GROWTH: 35.6%

Proof of the potential in posh new world wines: South African brand The Secretary Bird has grown its value by just over £5m, on volumes up over a quarter (26.9%), despite only being listed in Ocado and Booker stores so far. An omen of good things to come, perhaps, were The Secretary Bird to spread its wings into other retailers.

123
Green Mark

SALES: £16.6m
GROWTH: 34.7%

Billed as Russia's favourite vodka, Green Mark landed in the UK in 2012. It's racked up an added £4.3m in value sales this year, on volumes up almost a third (31.5%), with listings in Sainsbury's, Morrisons, Waitrose and Ocado. At an average of £16.67 per litre, it's more affordable than Glen's (19) and Chekov (79).

105
The Straw Hat

SALES: £20.3m
GROWTH: 31.2%

Another challenger from the world of wine. Rather than convincing shoppers to trade up, The Straw Hat's trio of wines, with an average price of £4.93 per litre, is actually more affordable than mainstream behemoths such as Hardys (7) and Echo Falls (12). Which suggests that while value brands may be suffering across the board, there's still room for wine with a killer price tag. As well as a long-standing Tesco listing, The Straw Hat gained extra space in Morrisons this year.

117
Adnams

SALES: £18.2m
GROWTH: 30.5%

Southwold-based brewer and distiller Adnams is on the up. The regional powerhouse has added £4.3m to its value – though £3.5m of that has come solely on the back of a solid performance for Ghost Ship, its biggest beer brand, which recently gained a new alcohol-free variant. In line with industry trends, its Copper House Gin (up £1.0m) and Ease Up IPA (up £310k) also won shoppers over.

141
Luis Felipe Edwards

SALES: £14.7m
GROWTH: 29.1%

Brits have gone gaga for Chilean wines, and Luis Felipe Edwards is reaping the benefits: sales of the brand (which is listed in Asda, Waitrose and Ocado) have risen £3.3m. Unlike many wine brands, LFE's prices – an average of £7.73 per litre – haven't risen this year, making it more affordable than splashing out on other South American brands such as Trivento (71).

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