

STOCK YOUR BAR FOR BETTER BUSINESS

SCOTLAND'S TOP BRANDS 2011



YOUR ESSENTIAL GUIDE TO THE ON-TRADE'S TOP DRINKS

Welcome to our special report on Scotland's top 60 brands. Over the next 14 pages you'll find comprehensive listings of the country's favourite drinks, commentary on the 20 best-selling brands in pubs, clubs, hotels and restaurants and individual analyses of the major drinks categories.

Our report is based on data compiled from CGA Strategy for the 52 weeks to May 14, 2011, versus the year to May 15, 2011. The sample is based on a service that covered 549 outlets across all types of outlet in Scotland. The sample is researched on a rolling quarterly basis to collect all 'wet brand' information.



1. Tennent's Lager

Owner: C&C Group

ABV: 4%



THERE are some certainties in life, it seems.

Tennent's Lager remains the country's most valuable on-trade brand – and if anything the 'big red T' has strengthened

its grip on the Scottish drinks scene.

Energised by C&C Group – the Magners owner which bought the Tennent's business two years ago – the brand has been active on a variety of fronts over our period, investing in TV advertising and sponsorship (Old Firm, T in the Park) and launching a new training facility at its Glasgow HQ.

With the Tennent's Training Academy spreading to Orkney and Shetland, C&C seems determined that Tennent's plays a role not just in promoting beer and pubs, but Scotland's wider hospitality industry.

2. Smirnoff 21 (Red)



ABV: 37.5%

Owner: Diageo



SCOTLAND'S top selling spirit remains the country's number two on-trade brand – after overcoming a testing period last year.

Diageo GB boss Simon Litherland told SLTN earlier this year that sales had stuttered in the second half of 2010 due to the trend towards take-home drinking and as many customers had bought in bulk in the first half ahead of an anticipated duty rise last summer, which ultimately didn't happen.

Despite the challenges, Smirnoff is said to have retained its dominant share of the market and had got off to a good start to 2011, boosted by regular advertising and other promotional activity.

4. Belhaven Best



Owner: Greene King

ABV: 3.2%



THE process of integrating Belhaven fully into Greene King was completed over the period our survey covers.

The latest diet of organisational change has brought Belhaven Best under the aegis of Greene King's brewing and brands business, now headed by former managing director Euan Venters.



And if anything the new structure has accelerated the upward trajectory of Best, which grew sales volumes by 1.8% in the year to the end of April, according to Greene King's most recent financial results.

The brand continued to be advertised on key sports programmes over the period.



3. Guinness

Owner: Diageo

ABV: 4.1%

LIKE stablemate Smirnoff, Guinness was said to have endured a sticky spell in the second half of last year, which Diageo attributed to a post-World Cup hangover and continuing pub closures.

Sales are said to have rebounded on the back of key events like St Patrick's Day and the 6 Nations international rugby union championship early this year.

Guinness also maintained a high-profile advertising presence throughout the period, its latest ads continuing the epic vein the brand has become synonymous with.

5. Foster's

Owner: Heineken

ABV: 4%



FOSTER'S aim is to be a "credible alternative" to Tennent's in the Scottish on-trade.

Our survey, which confirms the brand with the Aussie heritage retaining its position as a top five on-trade brand – and No.2 lager – suggests it's on track to achieve that goal.

Marketing activity over the period saw the brand invest heavily in sponsoring live comedy – including the Edinburgh Comedy Awards – and maintain its TV presence through its humourous 'good call' campaign.

A new font bearing revamped branding introduced last year is being rolled out to the brand this summer.



COMMENTARY: LAGER

Pubs defy the odds as lager category grows

GIVEN the duty and VAT hikes imposed on the lager category, not to mention brewery price rises and stuttering consumer confidence, one might have assumed it would become more difficult for the on-trade to profit from lager over the period.

Yet despite the challenges our figures from CGA Strategy indicate that the value of lager sold in Scotland's pubs, clubs, hotels and bars actually increased in the year to May, to £647 million from £638m the year before.

The fact that four of last year's top five selling lagers make up the top five this year could indicate that it's been a

healthy year for the big boys.

Market leader Tennent's proved it suits life under Dublin-based C&C Group by adding around £13m in on-trade sales over the period.

Pinpointing the reasons why Tennent's enjoyed such an uplift is an inexact science. But the fact the survey covered a year which saw the brand back on television and its first season as the jersey sponsor of Celtic and Rangers is likely to have helped.

There is also a theory that consumers turn to proven, established brands during times of economic difficulty, and if that's the case then Tennent's

would certainly have been well-placed to cash in.

Elsewhere in the lager top five there was little change to the status quo.

Foster's, the main challenger to Tennent's standard lager crown, and Stella Artois retained the No.2 and No.3 positions, while Carling moved up from five to four.

Burton-brewed Carling couldn't count on its Old Firm relationship last year, but the loss of the deal failed to stop it growing. In fact, breaking free from the Glasgow giants may have helped it boost sales in other parts of the country, especially in light of its new

sponsorship with the Scottish national team, and pouring rights at Hampden Park. That Carling is now also a partner of the Scottish Rugby Union may also have helped it reach drinkers beyond the football following world.

Distributor Miller Brands, meanwhile, saw one brand break into the top five but another drop out.

Miller Genuine Draft appeared to reap the dividends from fresh investment in advertising and in cultivating an association with live music. Surprisingly, Peroni fell two places to No.6, though Miller Brands says the brand is continuing to grow in Scotland.

top brands 6-15



6. Stella Artois

Owner: AB InBev

ABV: 5%



AB InBev reported a positive year for Stella Artois, with growth in the on-trade as the brewer continued to invest in campaigns, including an ad for Stella 4% set in 1960s French Riviera, designed to highlight its product quality. It was also a period which saw the brand move into new area with the launch of cider brand Cidre.

AB InBev pledged that there would be more innovation to come.

11. Carling

Owner: Molson Coors

ABV: 4%

A POSITIVE year for the UK lager giant, moving up a place in the overall and beer rankings (to No.4), perhaps suggesting the end of its long-running Old Firm sponsorship (replaced by new links to the Scottish national football team) has had little impact.

The year also saw the brand continue its pursuit of the 'perfect pint' – a major quality initiative – in the Scottish on-trade.



7. The Famous Grouse

Owner: The Edrington Group

ABV: 40%

PROMOTING new ways to consume whisky, in particular through long drinks, and the addition of new expressions, have generated significant growth for Grouse over the past year.

Brand distributor Maxxium UK says long serves like the Ginger Grouse (whisky with ginger beer/ginger ale served with fresh lime in a tall glass with ice) had opened more consumers up to the possibilities of whisky.

Add to that the interest brought by new expressions (Black Grouse, Snow Grouse and Naked Grouse) and it's little wonder the brand is on the up.



9. Morgan's Spiced

Owner: Diageo

ABV: 35%

A PERENNIAL favourite on the Scottish drinks scene, Morgan's Spiced moved up a slot in our overall top ten. Our survey period ended shortly before a major rebranding project, which saw Morgan's Spiced renamed Captain Morgan's Spiced, bringing the spirit in line with its international identity. Drinkers have been assured the liquid is "exactly the same".



8. Strongbow

Owner: Heineken

ABV: 4.5%



LIFE would appear to suit Strongbow under its Dutch master.

One of Heineken's priority brands, the "undisputed No.1 draught cider" in the UK grew sales through both direct Heineken customers and wholesalers.

The brand targeted 'the everyday working man' with its 'hard earned' campaign over the period (the latest ad aired in April), which it followed with activity at summer music festivals this year.



12. John Smith's

Owner: Heineken

ABV: 3.8%



MAXIMISING its links to horse racing was the key strategy for John Smith's in a year which saw the ale slip down four places in our overall rankings.

Now Scotland's No.3 ale, behind Belhaven Best and Deuchars, according to our survey, Smith's again looked to make the most its sponsorship of the Grand National and its now 52-year association with the John Smith's Cup, held at York.

RISING STAR

10. Deuchars IPA

Owner: Heineken

ABV: 3.8%



DEUCHARS performed well in a vibrant cask market – despite the challenges brought by a wave of 'me too' brands. Described as 'the ideal gateway to cask ale', the Edinburgh-brewed ale rose five places, from 15 to ten, in our on-trade ranking, as more pubs stocked cask beer and more consumers tried it. Marketing activity saw the brand benefit from its partnership with the Edinburgh Fringe which has expanded with this year's event, now underway.

13. Miller Genuine Draft

Owner: Miller Brands

ABV: 4.7%



MGD surged back up the charts last year, the brand seemingly reconnecting with 18-34 year olds on the back of fresh advertising (the Clean Streets campaign) and its association with live music.

Clean Streets built on the beer's four times cold filtered production message, and was accompanied by MGD's sponsorship of series of 'stripped down' gigs (Miller Filtered Music), which featured performances by Ash, Doves and Bombay Bicycle Club.

New advertising for Scotland's best selling packaged beer has just been launched.





14. Peroni Nastro Azzurro



Owner: Miller Brands

ABC: 5.1%

SLIPPING three places in the run-down of Scotland's most lucrative on-trade brands is a surprising result for a product that's been at the forefront of the world beer revolution. But then Miller has never pursued volume at all costs on this premium brand.

Instead, it has grown distribution slowly, focusing on selecting the right outlets to pour Peroni to ensure the liquid is delivered in optimal condition.

15. Bacardi

Owner: Bacardi-Martini

ABV: 37.5%



SCOTLAND'S best-selling white rum was again an active player on the Scottish scene, spending heavily on TV ads, advocating its mixability (in particular the Bacardi Mojito), and spinning off new products in the shape of pre-mixed drinks for the off-trade.

And its investment, which continued this summer with sampling activity at Rockness and other festivals, is paying dividends, with the brand moving up a couple of slots from 17 to 15 in our survey.



COMMENTARY: VODKA

New brands show their spirit

VODKA remains Scotland's biggest selling on-trade spirit and indeed improved its lot last year.

Category sales rose from £217 million to £229m in the year to May, lending weight to the theory that although consumers are visiting pubs less often, they are spending more when they do.

Smirnoff is still the dominant player, recovering after a sticky spell in the second half of Diageo's financial year to retain the top spot. But it was all change elsewhere in the top ten.

While established players Glens (3),

Vladivar (4) and Russian Standard (5) retained their top five spots, each moved down a place as others surged up the rankings. Absolut, for one, had a bountiful year, rising four places to the No.2 position, behind Smirnoff as it received hefty marketing support under Pernod Ricard (the Paris-based firm acquired the brand when it took over Vin & Sprit in 2008).

And gatecrashing the top ten for the first time was Bacardi-Martini's Eristoff, the triple-distilled grain vodka made in Georgia, which soared 12 places from

18 to 6.

No doubt benefiting from the distribution muscle provided by Bacardi Brown-Forman Brands, the sales and marketing vehicle, the Eristoff brand has been extended with new variants, including Eristoff Black and, more recently, Eristoff Gold, on its way to becoming one of vodka's fastest-growing brands since its UK launch in 2009.

Also making their way into the top ten were Odessa, from WaverleyTBS, and Stolichnaya, distributed by Maxxum.

The Big Favourite

Throughout the UK Glen's is recognised as the quality vodka with the very attractive price. In a recent blind tasting, carried out by a national broadsheet, it was voted number one beating some brands costing three times as much. The price clearly brings in the customers. It's equally clear that the quality brings them back.

And, of course, new customers.

Glen Catrine

7 Laigh Road, Catrine, Ayrshire KA5 6SQ.
Tel: 01290 551211.



COMMENTARY: READY TO DRINKS

Ready for the next generation

THE RTD market is certainly nowhere near as populated, or lucrative as it was in the early years of the 21st century.

But it remains an important category to many operators, and not least because of the advent of a new sub-category – alcoholic ginger beer.

While our figures indicate a slight fall in RTD on-trade sales (from £29 million to £28m), category leader WKD improved its lot, with sales rising from £9.5m to £10.2m over the period.

The market is also likely to have been lifted with the emergence of Crabbie's, the alcoholic ginger beer developed by Halewood, which has rapidly gained listings and won a following among a broad range of drinkers.

WKD, owned by Beverage Brands, deserves credit for its sustained ability to recruit new consumers to a category that's generally regarded to have past its popular peak.

Key to its longevity would appear to be its popular series of television ads – the laddish 'have you got a WKD side?' campaign must surely now be one of the longest-running in drinks history – which are supported in trade with relevant, humorous promotional mechanics.

Trade support also comes in the shape of one-off, seasonal campaigns designed to drive footfall, which tie into everything from Valentine's Day and Freshers' Week to Christmas and Hallowe'en. It means there's seldom a time when drinkers aren't invited to show

their WKD side.

But WKD isn't the only RTD show in town. While it's not quite the powerhouse it once was, Diageo's Smirnoff Ice is still the country's No.2 RTD, with former some time category leader Bacardi sitting at No.3.

In future both Ice and Breezer could find their positions threatened by a new generation of alcoholic ginger beers, spearheaded by Crabbie's, now the shirt sponsor of Hibernian FC.

And there's every chance it's a category which may go on to enjoy a broader audience than 'traditional' RTDs, with the brand aimed at 21-35 year old men and women.

On the up: Crabbie's Ginger Beer.



16. Kronenbourg 1664

Owner: Heineken
ABV: 5%



NOW being advertised by Madness, who have slowed down their classic hit Baggy Trousers for the brand's 'slow the pace' campaign, Kronenbourg 1664 saw its standing tail off slightly last year.

The drop, from 13 to 16, does not suggest a radical sales drop, though it might be argued that, in belonging to a Heineken stable that includes a host of other premium beers, Kronenbourg may not have commanded the attention it craves. However, with everyone from Suggs to Motorhead, who reworked Ace of Spades to kick-start the campaign last year, now singing its praises, sales may well quicken in the months ahead.

18. Jack Daniels

Owner: Brown-Forman
ABV: 40%



JACK Daniels' modest drop down in the rankings, from 16 to 18, reflects the decline in sales seen across the imported whiskey category last year.

Our data suggests the value of on-trade imported whiskey sales fell by £1m to £31m in the year to May.

Such a drop is not enough to suggest a category in serious decline, and Jack, looking forward to the usual birthday celebrations for Mr Jack next month, is not likely to be too concerned. The brand is once more cultivating a link with live music through the JD Set.

RISING STAR



17. Kopparberg

Owner: COS Brands
ABV: 4.5%

IT'S no surprise to see Kopparberg rise so assuredly up the rankings of the Scottish on-trade's top brands. The fruit-flavoured cider has moved up seven places amid reports from COS Brands that it's recording sales growth in the order of 50% year on year. Kopparberg's core range of pear, mixed fruit, strawberry and elderflower and lime has been augmented this year with the first of its new seasonal variants – raspberry and mint – with COS Brands hopeful of emulating the success the flavour has had in Sweden and Finland.

COS Brands managing director Davin Nugent credits the willingness of the independent sector to support Kopparberg as being key to its success, and remains confident there is growth to come for flavoured ciders, providing operators allow space for the variety of tastes and flavours now on the market.

19. Gordon's

Owner: Diageo
ABV: 37.5%

THE drop of a solitary place in the top 20 is unlikely to set alarm bells ringing at Diageo HQ.

But it could well be that the stalwart of the gin scene see is seeing some of the newer, niche brands now on the market stealing a little bit of its thunder.

According to our data, the value of gin sales generated in the on-trade rose from £37 million to £40m – a rise which may reflect the emergence of both a host of small batch gins from independent distillers and limited editions from established suppliers.

Gordon's was promoted in trade as part of Diageo's long mixed drinks campaign with Coca-Cola Enterprises.

20. Sourz

Owner: Beam Global
ABV: 15%



SOURZ held on to its top 20 place in on-trade rankings, dropping just a single position from 19 to 20, as distributor Maxxum continued to highlight the versatility of the liqueur-based drink.

The ever-increasing Sourz range, most recently expanded with its new Raspberry flavour, is now presented as much as a base for cocktails and pitchers as a single serve.

The brand, recently advertised on national television, reckons consumers' growing awareness of their alcohol intake has helped its incarnation as a cocktail base. What is clear is that the brand is in pretty solid shape.

21. Budweiser

Owner: AB InBev

ABV: 5%

**23. Carlsberg**

Owner: Carlsberg

ABV: 3.8%

**25. Magners**

Owner: C&C Group

ABV: 4.5%

**27. McEwan's 80/-**

Owner: Heineken

ABV: 4.2%

**29. Courvoisier**

Owner: Beam Global Spirits & Wine

ABV: 40%

**22. Jagermeister**

Distributor: Cellar Trends

ABV: 35%

**24. Whyte & Mackay**

Owner: Whyte & Mackay

ABV: 40%

**26. Corona Extra**

Owner: C&C Group

ABV: Grupo Modelo

**28. Absolut**

Owner: Pernod Ricard

ABV: 40%

**30. Bell's**

Owner: Diageo

ABV: 40%

**COMMENTARY: CIDER & GIN**

Cider still riding high

THE Scottish public's love affair with cider is showing no signs of fizzling out, according to data from CGA Strategy for the 52 weeks to May 14.

The total value of cider sales (draught and bottled) rose in the on-trade from £105.1 million to £113.8m, amid reports of strong growth from established brands and consumer enthusiasm for the variety of flavoured variants arriving on the market.

Staying at the front of the pack is Heineken powerhouse Strongbow.

Once again a regular investor in television advertising – the latest instalment in its 'hard earned' campaign, aimed at 'the every day working man' – hit the screens in April, by which time the brand was on its way to achieving



Strongbow was kept 'front of mind' with its target consumers thanks to regular TV ads.

£38.6m of on-trade sales for the year to May 14, up from £37.5m for the 12 months the year before.

Taking the number two spot behind Strongbow, for the first time, was the fruit-flavoured Kopparberg range from COS Brands. In interviews with SLTN earlier this year, COS managing director Davin Nugent explained the brand was maintaining growth of around 50% year on year, suggesting that Scots drinkers have an appetite for fruit-flavoured cider. COS has steadily extended its Kopparberg range beyond its original

pear variant, and is convinced there's still scope to grow cider sales in the on-trade.

Recent results from C&C Group, meanwhile, have indicated a recovery in the volume of Magners sold in the UK. Our survey suggests the Irish brand dropped down a place to No.3 in the cider charts, indicating that it remains an important brand for on-trade operators.

C&C's presence in the top five extended to Magners Golden Draught which entered the rankings in fifth place, and Blackthorn Dry in fourth.

Gin market on the up

IN a recent report we looked at the emergence of a host of niche brands which are reckoned to have sparked a new wave of consumer interest in the category.

And our top five proves that the market continues to be dominated by major players (see below), the growth experienced by the category in the year to May might suggest these niche brands are contributing serious sales, not just novelty value.

According to our figures, the value of gin sales rose from £37.3 million to £40.2m, with Gordon's out in front, followed by Bombay Sapphire, Hendrick's, Tanqueray and Beefeater. Such a surge in sales would suggest a growing consumer interest in gin and premium brands in particular, giving credence to the supplier view that consumers are hitting the pubs less often but spending a little more per drink when they do.

TOP FIVE CIDERS**STRONGBOW****KOPPARBERG****MAGNERS****BLACKTHORN****MAGNERS GOLDEN DRAUGHT****TOP FIVE GINS**

GORDON'S

BOMBAY SAPPHIRE

HENDRICK'S

TANQUERAY

BEEFEATER

COMMENTARY: ALE & WHISKY

Ale up as IPA hits top ten



Dunbar-brewed Best topped the ales list again.

THE improving fortunes of cask ale have been well documented in SLTN in recent times. But the growth in ale has not been confined to the cask variety.

As the value of ale sold in the on-trade rose to £267.6m in the year to May 14 – compared to £245.6m in the 52 weeks to May 2010 – there was a robust performance from the leading brand, the keg ale Belhaven Best.

A consistently good performer in recent years for owner Greene King, Best saw the value of its sales in pubs, clubs, bars, hotels and restaurants jump from £73.6m to £85.3m.

The brand, a frequent TV advertiser over our sample period, is now even

making inroads into the English market, now it's officially part of the overall Greene King Brewing and Brands business.

Cask ale Deuchars IPA also had a year to remember, rising to the No.2 position in ales as it gatecrashed the overall drinks top ten.

Speaking to SLTN late last year, Deuchars' boss Stephen Crawley explained the brand was benefiting from the best of both worlds – the distribution and financial power of ultimate owner Heineken on one hand, and the freedom to run the Caledonian Brewing Company largely autonomously on the other. Yet it is also fair to say Deuchars has

TOP FIVE ALES

BELHAVEN BEST

DEUCHARS IPA

JOHN SMITH'S

MCEWAN'S 80/-

MCEWAN'S EXPORT

capitalised on the growing consumer interest in cask ale, as successive Cask Reports have confirmed.

The rest of the ale top five is taken up by other Heineken-owned brands: John Smith's, which augmented its ties with horse racing over the period, and McEwan's ales 80/- and Export, which continue to enjoy the exposure brought by distributor Jigsaw Brands.

TOP WHISKIES

THE FAMOUS GROUSE

BELL'S

SCOTTISH LEADER

BLACK BOTTLE

Scotch outshines whiskey imports

FOR some years it seemed the growth in whisky sales was only occurring in emerging, overseas markets.

It remains the case that the big sales numbers are being generated in parts of Asia, South America, South Africa and Russia, but happily there's now evidence of improvement on the domestic front.

According to our CGA figures, Scotch sales in the on-trade were worth £96.8 million in the year to May 14, in contrast to £92.5m over the year before.

And it seems much of the growth was delivered by leading brand The Famous Grouse, which saw sales jump from £30.9m to £38.6m on the back

of new expressions and the successful promotion of long serves in bars.

While Scotch was on the up, there was a decline in fortunes for imported whiskies. Leading brand Jack Daniel's saw a slight sales decline (from £23.6m to £22.7m), as overall category sales dropped from £31.6m to £30.6m.

31. Moet et Chandon

Owner: LVMH
ABV: 12%



32. Southern Comfort

Owner: Brown-Forman
ABV: 35%



33. Blackthorn Dry

Owner: C&C Group
ABV: 5%



34. Stowells

Owner: Accolade Wines
ABV: varies



35. Oliver & Gregs

Owner: WaverleyTBS
ABV: varies



36. Glen's

Owner: Glen Catrine Bonded Warehouse
ABV: 37.5%



37. WKD

Owner: Beverage Brands
ABV: 4%



38. Baileys

Owner: Diageo
ABV: 17%



39. Vladivar

Owner: Whyte & Mackay
ABV: 37.5%



40. Bombay Sapphire

Owner: Bacardi-Martini
ABV: 40%



41. MCEWAN'S EXPORT Owner: Heineken ABV: 4.5%		42. JOSE CUERVO Owner: Diageo ABV: 38%	
43. FLEUR DE LYS Owner: ABV: varies		44. HEINEKEN Owner: Heineken ABV: 5%	
45. HARDYS Owner: Accolade Wines ABV: varies		46. MCEWAN'S 70/- Owner: Heineken ABV: 3.7%	
47. BUDWEISER BUDVAR Owner: Budweiser Budvar UK ABV: 5%		48. VALLE ANDINO Distributor: Matthew Clark ABV: varies	
49. E&J GALLO Owner: E&J Gallo Wines ABV: varies		50. BECK'S Owner: AB InBev ABV: 5%	

COMMENTARY: HIGH FLYERS, RUM & BRANDY

Flying high in the Scottish trade



Life is Swede: Kopparberg sales are on the up.

IT'S no secret that trading conditions have been, and continue to be, tough. Consumers are keeping a tight rein on spending and going out less often – and licensees are having to grapple with rising operating costs.

Despite the economic gloom, several drinks brands have seen sales in Scotland's pubs and clubs soar in the past 12 months, propelling them up the chart in our brands report, which uses CGA Strategy data for the year to May 14.

And it's not just one or two drinks categories that can boast success stories: high flyers are evident across cider, lager, ale, speciality spirits, vodka, wine, Tequila, Cognac and rum.

Some of the biggest movers in the year

came from the vodka category. Georgian brand Eristoff, which launched in the UK two years ago, rocketed 143 places up the Scottish on-trade brand rankings from 200th to 57th place; Pernod Ricard's Absolut brand also saw its fortunes improve, rising 27 places from 55 last year to 28.

In the lager category, Heineken-owned Amstel jumped 21 places in the top brands ranking to 52, while Miller Genuine Draft climbed seven places to 13 and Staropramen rose seven places to 54.

Sweden's Kopparberg was the star performer in the cider category, up seven places to 17 in the overall brand listing.

German herb liqueur Jägermeister, popularly consumed as a shot or mixed

with an energy drink, gave another stellar performance rising nine places to 22 in the ranking; while cream liqueur Baileys climbed six places to 38.

Deuchars IPA saw its ranking in the Scottish on-trade improve, up five places and breaking into the top ten in the number ten spot.

And the wine category boasted no shortage of high flyers, with Stowells up six places to 34, Fleur de Lys up seven to 43, Valle Andino rising 21 places to 48, and E&J Gallo up 15 to 49.

Courvoisier Cognac climbed seven places to 29, Jose Cuervo Tequila was up ten places to 42, and Pernod Ricard's Havana Club golden rum climbed 14 places to 60 in the Scottish on-trade top brands listing.

Rum category enters a golden era

THE figures back up what many in the trade have thought for some time: that rum's popularity is growing.

The value of rum sold in the Scottish on-trade in the year to May 14 topped £84.6 million, up from £76.2m the previous year.

Morgan's Spiced retained the top

spot in the rum category and white rum Bacardi hung on to the number two position. Another spiced rum, Sailor Jerry, climbed one place to number three in the category, with Morton's OVD dark rum sliding one place to four.

Havana Club, which climbed 14 places up the overall brand rankings to 60,

retained fifth place in the rum category.

In brandy and Cognac, the top four brands in the category have remained unchanged, with Courvoisier in the top spot followed by Martell, Hennessy and Rémy Martin. Three Barrels climbed into fifth place in the category from seventh last year.

TOP RUMS

CAPTAIN MORGAN'S SPICED

SAILOR JERRY

MORTONS DARK RUM

COMMENTARY: WINE & SPECIALITY SPIRITS

Grape expectations

WINE is widely held to have prospered from the growing importance of food to Scotland's pubs and bars in the wake of the smoking ban. And it's a trend that seems to be continuing.

Figures from CGA Strategy show the value of wine sold in Scotland's pubs, restaurants and hotels topped £498 million in the year to May 14, up from £401m the previous year.

But, according to the report, there have been some changes when it comes to wine brands' rankings.

Stowells, which was rated the third biggest wine brand in the Scottish on-trade in the year to May 14, 2010, leapt into pole position this year.

The wine, which was listed as the 34th

biggest brand in the overall on-trade rankings, was rebranded earlier this year by parent company Constellation, whose UK and Australia business has since been renamed Accolade Wines following its acquisition by a private equity firm.

The revamp, which was designed to combine contemporary labelling while emphasising its 19th century origins, included the launch of a Stowells sub-brand, Nine Yards, exclusive to the on-trade.

The move means last year's number one wine brand in the Scottish on-trade, Oliver & Gregs, has slipped into second place in the rankings; it retained its position as the 35th biggest brand in the overall listing.

Last year's number two wine brand

Hardys has also slipped down the listing to number four, and 45 in the overall brand listing, while Fleur De Lys has moved up from five to three and jumped seven places to 43 in the overall top 60 brands listing.

Other leading on-trade wine brands listed in the report include Concha y Toro, E&J Gallo, Monte Verde and Valle Andino.

Moet & Chandon retained its position at the top of the sparkling wine and Champagne sub-category. The brand, which is owned by luxury goods company LVMH, came in at 31 in the top 60 overall brand listings.

Other wine brands in the top 60 brand listing include Valle Andino at 48, E&J Gallo at 49 and Monte Verde at 55.



Stowells was rebranded earlier this year.

TOP SPECIALITY SPIRITS

- Sourz
- Jagermeister
- Southern Comfort
- Baileys

Speciality spirits maintain order

THERE'S no change when it comes to the best-selling speciality spirits and liqueurs in the Scottish on-trade.

Sourz has retained its position at the top of the category, followed by Jagermeister, Southern Comfort, Baileys and Luxardo Sambuca.

The top five running order might be the

same as last year but that doesn't mean the category has been without activity.

The value of speciality spirits sold in the Scottish on-trade in the year to May 14 reached £114.9m, up from £96.9m the previous year.

And many have climbed their way up the overall brand listings, including

Jagermeister, which climbed nine places to 22 in the top 60 brands. Its ability to be consumed either as a shot or mixed with an energy drink is reckoned to have bolstered its popularity.

Baileys was up six places to 38, Southern Comfort retained its position at 32 and Sourz dropped one place to 20.

51. RUSSIAN STANDARD

Distributor: First Drinks
ABV: 40%



52. AMSTEL

Owner: Heineken
ABV: 4.1%



53. SMIRNOFF ICE

Owner: Diageo
ABV: 5%



54. STAROPRAMEN

Owner: StarBev
ABV: 5%



55. MONTE VERDE

ABV: varies



56. YOUNGER'S TARTAN SPECIAL

Owner: Heineken
ABV: 3.7%



57. ERISTOFF

Owner: Bacardi Martini
ABV: 37.5%



58. SAILOR JERRY

Owner: Wm Grant & Sons
ABV: 40%



59. MORTONS OVD

Owner: Wm Grant & Sons
ABV: 40%



60. HAVANA CLUB

Owner: Pernod Ricard
ABV: 40%

