

Sizzling Hot

Despite supply chain issues, business is good for these Hot Brands.



Each year, Impact Databank’s annual “Hot Brand” list celebrates the fastest-growing brands across the drinks business. This year, a total of 96 brands from the wine, spirits, and RTD cocktail categories made the list.

There are three different ways to qualify as an Impact Hot Brand: a contender must have shown double-digit growth in each year from 2019 to 2021, or be an established player with at least 15% growth in 2021, or otherwise be a top 10 brand with at least 5% growth in 2021 and 15% growth since 2018. The minimum volume requirement for spirits and imported wines is 200,000 cases, while domestic wines and RTDs must meet a threshold of 250,000 cases.

Some 43 spirits brands were awarded Impact Hot Brand honors, bringing together the fastest-rising players across the spirits world. The award winners are among the most successful and valuable brands in the market, and offer a snapshot of what categories and brands are charting the course

forward for spirits in the U.S. The macro trends of the last few years—a surge of interest in whiskies and Tequila—continues apace, with those two categories placing an equal number of brands on the honor roll.

While whiskies and Tequila make up 60% of this year's Hot Brand winners, other categories like liqueurs and Cognac made a strong showing, pointing toward further prominence as consumers explore various brands within those segments. Vodka, king among spirits in America overall, also made a solid showing, boasting two of the top five Hot Brands in terms of total volume.

This year's largest Hot Brand is Tito's. The brand added 625,000 nine-liter cases last year, coming in at just under 11 million cases in total. Though the brand posted substantial growth, 2021 marks a slowdown for Tito's and is the first time in recent years that the brand failed to add 1 million cases in a calendar year. A rarity in the vodka category with only a single release in a variety of sizes, Tito's still has a commanding lead over the other winning Hot Brands; it's ahead of the second largest awardee, Fireball, by over 4 million cases. "We try to do one thing and do it really well, so we put all our energy into making the very best vodka out there and have no plans for new products," says Frank Polley, vice president of trade marketing at Tito's.

Sazerac's Fireball is another rare example of a brand with just one offering in its arsenal. Last year, Fireball grew by 7.5% to roughly 6.8 million cases, earning Hot Brand honors and keeping it in the running as one of the largest spirits brands in the U.S. While Fireball remains focused on its core flavored whisky, the brand has also launched a malt-based Fireball Cinnamon in off-premise locations that are unable to sell distilled spirits, further extending its reach.

The third-largest spirits Hot Brand is Pernod Ricard's Jameson, this year earning the award for its original release, without the help of its buoyant Black Barrel and Caskmates offshoots. The brand grew 17.1% last year to 3.7 million cases, completely erasing 2020's 7% dip and returning the brand to solid footing. Just behind Jameson in the top five is Grey Goose, another brand shifting gears after a challenging period. The French vodka is the largest imported vodka to earn a Hot Brand, jumping 27% to just over 2.6 million cases. Two other vodka brands—E.&J. Gallo's New Amsterdam Pink Whitney and Western Son's namesake brand—also earned Hot Brand awards. Gallo's entry was at 1.1 million cases in only its third year on the market and Western Son's line of vodkas was at 379,000 cases for 2021.

2021 DISTILLED SPIRITS HOT BRANDS^{1,2}

(thousands of 9-liter cases)

Brand	Company	2018	2019	2020	2021	Percent Change ³		
						'18-'19	'19-'20	'20-'21
Tito's	Fifth Generation Inc.	7,400	8,770	10,350	10,975	18.5%	18.0%	6.0%
Fireball	Sazerac Co. Inc.	5,210	5,625	6,300	6,775	8.0	12.0	7.5
Jameson Original ⁴	Pernod Ricard USA	3,197	3,444	3,198	3,743	7.7	-7.2	17.1
Grey Goose	Bacardi USA Inc.	2,262	2,227	2,063	2,629	-1.5	-7.4	27.5
Maker's Mark	Beam Suntory Inc.	1,758	1,901	1,988	2,304	8.1	4.6	15.9
1800	Proximo Spirits	1,058	1,167	1,531	1,800	10.2	31.2	17.5
Rémy Martin	Rémy-Cointreau USA	1,017	989	1,277	1,556	-2.7	29.1	21.8
Don Julio	Diageo North America	745	900	1,125	1,525	20.9	25.0	35.5
Hornitos	Beam Suntory Inc.	1,002	1,028	1,149	1,509	2.6	11.8	31.4
Woodford Reserve	Brown-Forman Beverages Worldwide	651	792	977	1,119	21.7	23.4	14.5
New Amsterdam	Spirit of Gallo	-	160	820	1,095	+	+	33.5
Pink Whitney								
Casamigos	Diageo North America	333	500	725	1,025	50.0	45.0	41.5
Ole Smoky ⁵	Ole Smoky Distillery	304	417	672	1,009	37.1	60.9	50.3
Espolón	Campari America	392	510	768	979	30.1	50.6	27.5
D'ussé	Bacardi USA Inc.	305	372	548	871	22.2	47.1	59.1
El Jimador	Brown-Forman Beverages Worldwide	620	678	732	848	9.4	8.0	15.8
Courvoisier	Beam Suntory Inc.	533	585	706	792	10.0	20.7	12.1
Crown Royal Peach	Diageo North America	-	450	585	705	+	30.0	20.5
Rumchata	Spirit of Gallo	465	475	550	635	2.2	15.8	15.5
Grand Marnier	Campari America	522	525	540	625	0.6	2.9	15.7
Teremana	Mast-Jagermeister US Inc.	-	-	230	614	-	+	+
Juarez	Luxco Inc. (MGP)	504	513	410	537	1.8	-20.0	30.9
Hendrick's	William Grant & Sons USA	410	452	441	531	10.2	-2.3	20.4
Milagro	William Grant & Sons USA	279	293	349	498	5.2	19.0	42.8
Basil Hayden's	Beam Suntory Inc.	253	320	393	475	26.6	22.8	21.0
Pendleton	Proximo Spirits	298	345	397	445	15.7	14.9	12.0
Cointreau	Remy-Cointreau USA	275	228	346	418	-17.2	52.2	20.5
Disaronno Originale	Disaronno International	345	333	336	390	-3.5	1.1	16.0
Western Son	Western Son Distillery	172	231	332	379	34.3	43.7	14.2
Old Forester	Brown-Forman Beverages Worldwide	223	271	320	378	21.5	18.1	18.1
Four Roses	Four Roses Distillery	240	285	335	375	19.0	17.5	12.0
Arrow Cordials	Luxco Inc. (MGP)	312	309	293	365	-1.0	-5.0	24.5
Herradura	Brown-Forman Beverages Worldwide	192	213	229	363	10.9	7.5	58.5
Jose Cuervo Tradicional	Proximo Spirits	185	240	287	353	29.7	19.5	22.7
Juarez Triple Sec	Luxco Inc. (MGP)	225	221	208	321	-1.8	-6.2	54.5
Aperol	Campari America	160	241	248	305	50.6	2.9	23.0
Proper No. Twelve	Proximo Spirits	41	131	232	280	+	77.1	21.0
The Macallan	Edrington Americas	261	268	209	267	2.5	-21.8	27.4
Exotico	Luxco Inc. (MGP)	125	147	194	238	17.6	32.3	22.3
Martell	Pernod Ricard USA	212	234	174	231	10.1	-25.6	32.8
Blue Chair Bay	Fishbowl Spirits	161	180	200	227	11.6	11.3	13.3
Angel's Envy	Bacardi USA Inc.	82	115	150	223	39.5	30.8	48.3
Corralejo	Infinium Spirits	149	167	197	218	12.2	17.8	10.5
Total Hot Spirits		25,477	28,481	32,763	39,972	11.8%	15.0%	22.0%

¹ Criteria:

Established brand with double-digit growth each year in 2019, 2020 and 2021

Established brand with at least 15% growth from 2020 to 2021

Special consideration—top ten brand with at least 5% growth in 2021 and at least 15% growth since 2018

² Calendar 2021 minimum volume requirement = 200,000 cases

³ Based on unrounded data

⁴ Excludes Black Barrel, Caskmates, Cold Brew and other line extensions

⁵ Includes moonshine, blended whiskey and a small amount of RTDs

Source: IMPACT DATABANK ©2022

Representing American whiskey, Beam Suntory-owned Maker's Mark is the leading super-premium Bourbon in the U.S. Last year, Maker's Mark topped 2.3 million cases on 16% growth. Greg Hughes, president of Beam Suntory North America, told Impact that Maker's 46 and other higher-end whiskies have been driving gains for the brand. In addition to earning a Hot Brand award for Maker's, Beam Suntory landed another super-premium Bourbon on the list with Basil Hayden's at 475,000 cases, up 21%.

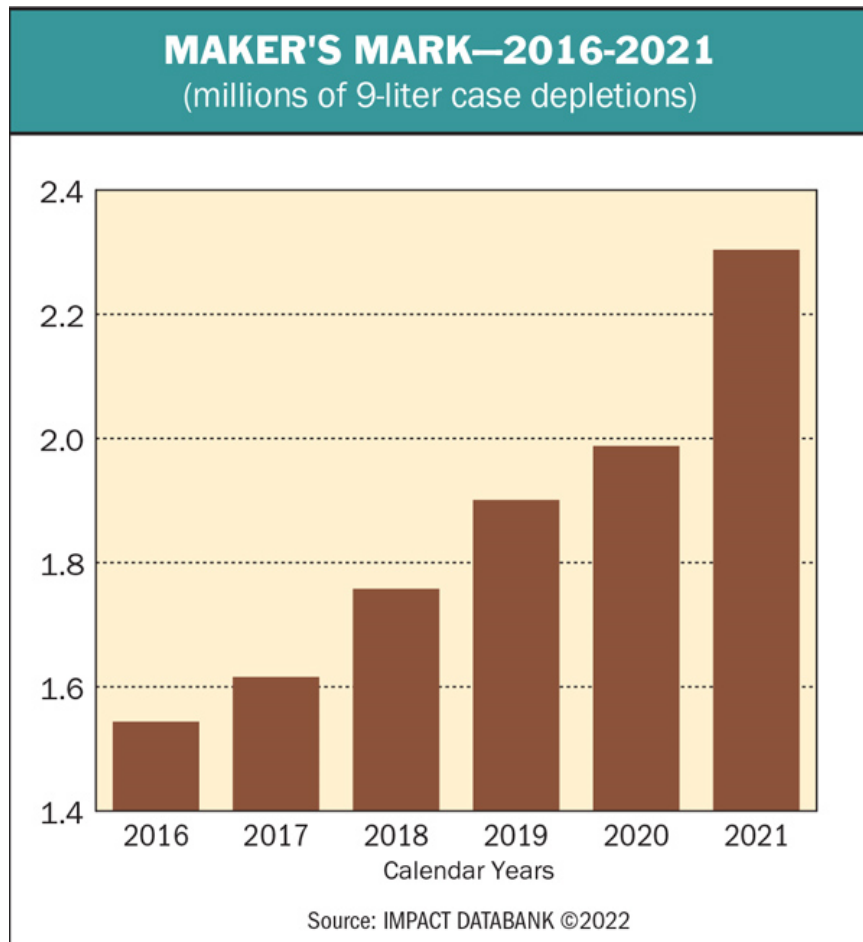
Tequila's Hot Brand winners skew heavily toward super-premium and luxury priced 100% blue agave bottlings. In fact, only one of the 13 awardees is a mixto Tequila and the bulk of the winning brands are firmly priced in the super-premium tier. The largest of the Tequila contingent is Proximo's 1800 at 1.8 million cases, up 18%. Portfoliomate Jose Cuervo Tradicional also made the grade at 353,000 cases, up 22.7%. Diageo's Don Julio is the largest luxury-priced Tequila to earn a Hot Brand award. Don Julio grew by 35.5% last year, exceeding 1.5 million cases and placing it among the fastest growing Hot Brands overall. Beyond Don Julio, Diageo also scored a Hot Brand award for Casamigos, which reached 1 million cases last year for the first time on 41.5% growth.

Beam Suntory's largest Tequila Hot Brand, Hornitos, comes in just behind Don Julio at 1.5 million cases. Last year, the brand was up 31% and has accelerated every year since 2018. While Hornitos rounds out the Tequila Hot Brands above 1 million cases, there are two brands that are just on the cusp of that mark. Campari America's Espolòn, at 979,000 cases and up 27.5% last year, will almost certainly cross the million-case mark this year, and Brown-Forman's El Jimador, at 848,000 cases for 2021, is a strong contender to reach that level as well.

While growing from a smaller volume base, Dwayne Johnson's Teremana Tequila—imported by Mast-Jägermeister U.S., which now also has an ownership stake—has the strongest percentage growth rate of all this year's Hot Brand winners. The brand nearly tripled in size last year, growing from 230,000 cases in 2020 to 614,000 for 2021. "It's now time to make Teremana Tequila a true global Tequila brand, to be enjoyed by the people around the world," says Johnson. "Moving forward, we will work extremely hard to increase capacity, scale, and distribution. But like with anything I do, Teremana will never cut corners."

Luxco's Juarez brand is the only mixto Tequila to earn a Hot Brand award, at 537,000 cases. The Tequila roster also includes William Grant & Sons' Milagro at 498,000 cases, Brown-Forman's Herradura at 363,000 cases, Luxco's Exotico at 238,000 cases, and Infinium Spirits' Corralejo at 218,000 cases.

Whiskies made another strong showing among this year's Hot Brand winners, with six Bourbons, two Canadian whiskies, two Irish whiskies, and one each of flavored whisky, Tennessee whiskey, and single malt Scotch meeting the Hot Brand criteria. Brown-Forman's Woodford Reserve is the second-largest Bourbon to earn the award this year, behind Maker's Mark. Woodford crossed the 1-million-case mark last year, up 14.5% to 1.1 million cases.



Trailing Woodford by less than 100,000 cases is Ole Smoky Distillery's namesake brand. Last year, the brand also surpassed 1 million cases, up 50.3%. "One of the reasons we've done so well is we have a different model from any other spirits company because we have distilleries in popular destinations that are very highly visited," says Ole Smoky CEO Robert Hall. "In fact, last year we had over 5.5 million visitors at our four distilleries." Other American whiskies to earn Hot Brand honors for 2021 include Brown-Forman's Old Forester at 378,000 cases, up 18.1%; Four Roses at 375,000 cases, up 12%; and Bacardi's Angel's Envy, which grew by 48% to 223,000 cases. Angel's Envy recently launched a rye finished in ice cider casks, retailing at \$250 a 750-ml.

Diageo-owned Crown Royal Peach and Proximo's Pendleton represent the Canadian whisky category. Pendleton is now roughly twice the size it was when Proximo acquired the brand from Hood

River Distillers in late 2017. Proximo also earned honors with Proper No. Twelve Irish whiskey, in which it acquired a majority stake last year in a deal worth up to \$600 million for brand co-founders Conor McGregor, Audie Attar, and Ken Austin.

The Macallan, part of the Edrington portfolio, is the lone single malt on this year's list, up 27.4% to 267,000 cases. Last year The Macallan kicked off a new series of limited-edition whiskies with The Macallan Harmony Collection Rich Cacao, positioned at \$160 a 750-ml.

While so many of the 2021 Hot Brand winners were Tequilas and whiskies, five liqueurs, four Cognacs, two cordials, one gin, and one rum also earned honors. The largest liqueur, E.&J. Gallo's RumChata, finished at 635,000 cases last year after showing 15% growth. Other Hot Brand liqueurs skew toward the super-premium end, with imports like Campari's Grand Marnier and Aperol, Cointreau, and Disaronno's Originale all rising at impressive rates last year.

The winning Cognac brands are led by Rémy Martin at 1.6 million cases, gaining 21.8% last year. The last two years have shown quite a turnaround for the brand, with growth accelerating since it saw a small decline in 2019. "We've been investing strongly above the line, including our Team Up For Excellence campaign with Usher," says Ian McLernon, president and CEO, Rémy Cointreau Americas. "We've also seen some high growth coming from XO, which has an opportunity to compete against single malts and other higher-end whiskies." Beam Suntory's Courvoisier also earned a Hot Brand award for its 2021 performance, which saw the brand rise 12.1% to 792,000 cases. Just ahead of Courvoisier is Bacardi's d'Ussé at 871,000 cases, up 59%. Finally, Pernod Ricard's Martell also earned a Hot Brand award, growing 32.8% to reach 231,000 cases.

The lone gin on this year's list is William Grant & Sons' Hendrick's at 531,000 cases, which was up 20% and reversed a decline during a challenging 2020. "Hendrick's is our biggest and most important brand in the U.S.," says Paul Basford, William Grant's president and managing director for the U.S. "It's strategically very different from what's out in the gin category, and I think that's why it has always done well."

Fishbowl Spirits' Blue Chair Bay secured the lone rum award this year, growing 13.3% to 227,000 cases and returning to the Hot Brands list. Finally, two domestic cordials—Arrow and Juarez Triple Sec, both from Luxco—made the grade. Arrow grew to 365,000 cases last year and Juarez Triple Sec reached 321,000 cases, up 24.5% and 54.5%, respectively.

2021 DOMESTIC WINE HOT BRANDS^{1,2}

(thousands of 9-liter case depletions)

Brand	Company	2018	2019	2020	2021	Percent Change ³		
						'18-'19	'19-'20	'20-'21
Josh Cellars	Deutsch Family Wine & Spirits	2,660	3,372	4,543	4,826	26.8%	34.7%	6.2%
Bota Box Nighthawk	Delicato Family Wines	825	1,250	2,300	2,600	51.5	84.0	13.0
William Wycliff	E.&J. Gallo Winery	1,140	1,220	1,190	1,410	7.0	-2.5	18.5
Decoy by Duckhorn	Duckhorn Wine Co. (TSG)	711	855	1,086	1,293	20.2	27.1	19.0
Barefoot Fruitscato	E.&J. Gallo Winery	-	-	750	1,275	-	+	70.0
Bread & Butter	WX Brands	304	467	880	1,160	53.7	88.4	31.8
Canyon Road	E.&J. Gallo Winery	1,010	1,040	900	1,035	3.0	-13.5	15.0
Oliver	Oliver Winery & Vineyards	385	459	645	740	19.1	40.5	14.8
J. Roget	Constellation Brands	1,020	930	578	725	-8.8	-37.9	25.4
House Wine ⁴	Precept Wines	338	451	589	649	33.5	30.5	10.2
Copper Ridge	E.&J. Gallo Winery	680	585	500	575	-14.0	-14.5	15.0
Daou	Daou Vineyards	270	305	340	465	13.0	11.5	36.7
Seaglass	Trinchero Family Estates	326	375	361	438	15.0	-3.7	21.3
Justin	Justin Vineyards & Winery	275	303	339	385	10.2	11.9	13.6
Sycamore Lane	Trinchero Family Estates	675	623	288	377	-7.7	-53.8	30.9
Fitvine	Fitvine LLC	128	226	317	375	77.5	40.1	18.3
Burlwood Cellars	E.&J. Gallo Winery	155	200	245	365	29.0	22.5	49.0
Bota Box Breeze	Delicato Family Wines	-	-	-	365	-	-	+
Fre ⁵	Trinchero Family Estates	205	223	253	313	8.8	13.5	23.7
Duckhorn Vineyards	Duckhorn Wine Co. (TSG)	177	187	215	275	5.7	14.7	28.0
The Prisoner	Constellation Brands	188	191	227	267	1.7	18.7	17.6
Imagery Estates	The Wine Group	90	160	207	261	77.8	29.4	26.1
Gruet	Precept Wines	140	190	219	250	35.7	15.3	14.2
Cupcake LightHearted	The Wine Group	-	-	107	250	-	+	+
Total Hot Domestic Wine		11,702	13,613	17,079	20,673	16.3%	25.5%	21.0%

¹ Criteria:

Established brand with double-digit growth each year in 2019, 2020 and 2021

Established brand with at least 15% growth from 2020 to 2021

Special consideration—top ten brand with at least 5% growth in 2021 and at least 15% growth since 2018

² Calendar 2021 minimum volume requirement = 250,000 cases

³ Based on unrounded data

⁴ Includes some imports

⁵ Non-alcoholic

Source: IMPACT DATABANK ©2022

Domestic Wine: California Dominates

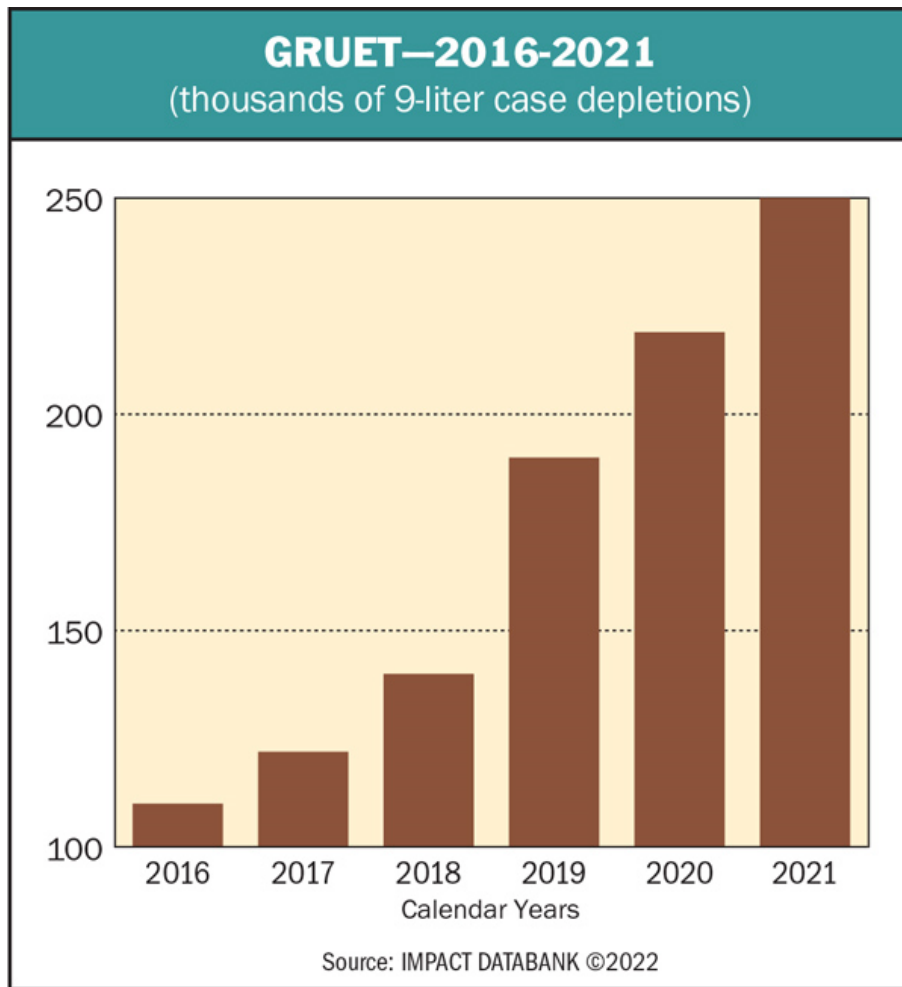
Twenty-four domestic wine labels qualified as Hot Brands this year. The vast majority hail from California, with only four entrants coming from other regions. In addition to Californian dominance and in contrast to imports, the list skews heavily toward still wine rather than sparklers. Overall, the domestic Hot Brands list comprises 18 California table wines, one California sparkler, one New York sparkler, one Washington table wine, one Indiana table wine, a New Mexico sparkler, and a California non-alcohol brand.

The domestic list is led by Josh Cellars, from Deutsch Family Wine & Spirits. The California brand grew to 4.8 million cases last year, adding about 300,000 cases from its 2020 total following years of explosive growth that has nearly doubled its volume since as recently as 2018. Deutsch Family continues to invest behind the brand and ran national television advertising for the first time over the recent holiday season, which further boosted its fortunes. Deutsch Family president Tom Steffanci sees significant untapped potential in the brand. “We’ve got a younger consumer base than our price tier, so we’re blessed that consumers ages 21-35—where wine consumption is lower disproportionately—are enjoying Josh,” he says. “We feel like there’s a lot of upside for Prosecco to bring consumers into the fold, and I think you’ll also see more rapid growth on the Reserve side.”

Constellation Brands fielded two Hot Brands this year with New York sparkling label J. Roget and California’s The Prisoner. The latter has grown consistently above 15% for the last two years to reach 267,000 cases in 2021, bolstered by new line extensions like The Prisoner Unshackled. Constellation CEO Bill Newlands credited The Prisoner Unshackled as one the brands powering “solid growth” across the company’s fine wine and craft spirits division. He also called out The Prisoner Saldo Red Blend as a successful direct-to-consumer-only release. After years of erosion, J. Roget righted the ship in a big way last year as it reversed course and grew 25.4% to reach 725,000 cases.

“Category leading growth of The Prisoner and The Prisoner Wine Co. is a core part of Constellation Brands’ Aspira Fine Wine and Craft Spirit strategy,” says Bukola Ekundayo, general manager of The Prisoner Wine Co. “The Prisoner has a strong retail business that was able to absorb some of the severe setbacks in the on-premise in 2020. In 2021, we were able to shift some focus back on the on-premise and have seen +70% growth. Our biggest goal for The Prisoner is to raise awareness for the brand with more consumers.”

Constellation was also excited about the performance of J. Roget. “We were thrilled to see such strong performance on J. Roget, especially coming out of a pandemic, with growth at 37%,” says Julie Rossman, J. Roget’s vice president of marketing. “J. Roget is primarily an on-premise brand, so its growth rates are benefiting as bars and restaurants continue to reopen.”



At Delicato Family Wines, two Bota Box extensions made the list. The Bota Box Nighthawk range consists of eight varieties that boast bold flavors and eco-friendly packaging, including Bourbon Barrel Cabernet Sauvignon, Lush Pinot Noir, and Dark Malbec, among others. Nighthawk has rocketed to No.-2 among Hot Brands, reaching 2.6 million cases last year, up 13% from 2020 and up nearly 2 million cases since 2018 when it was at 825,000 cases. Part of that success can be attributed to Bota Box’s massive gains in e-commerce over the pandemic, which CEO Chris Indelicato credits to the company’s “This is How You Bota” marketing program. “It’s been incredibly successful, and we’ve been working on it for years,” he says. “Our big push is to really have an e-commerce-driven strategy for this brand, and it’s taken us a lot of time to develop that and get up to speed. Now, the program is widely available, and we spend millions of dollars advertising it, to great effect.”

Meanwhile, Bota Box Breeze is the company’s foray into lighter fare, both in terms of alcohol content and caloric intake. The four offerings in the Breeze lineup—Pinot Grigio, Dry Rose, Red Blend, and Sauvignon Blanc—all are made with grapes picked earlier in the season to reduce their natural sugar

level, resulting in a product that's at 8% abv and features about 80 calories a 5-ounce glass.

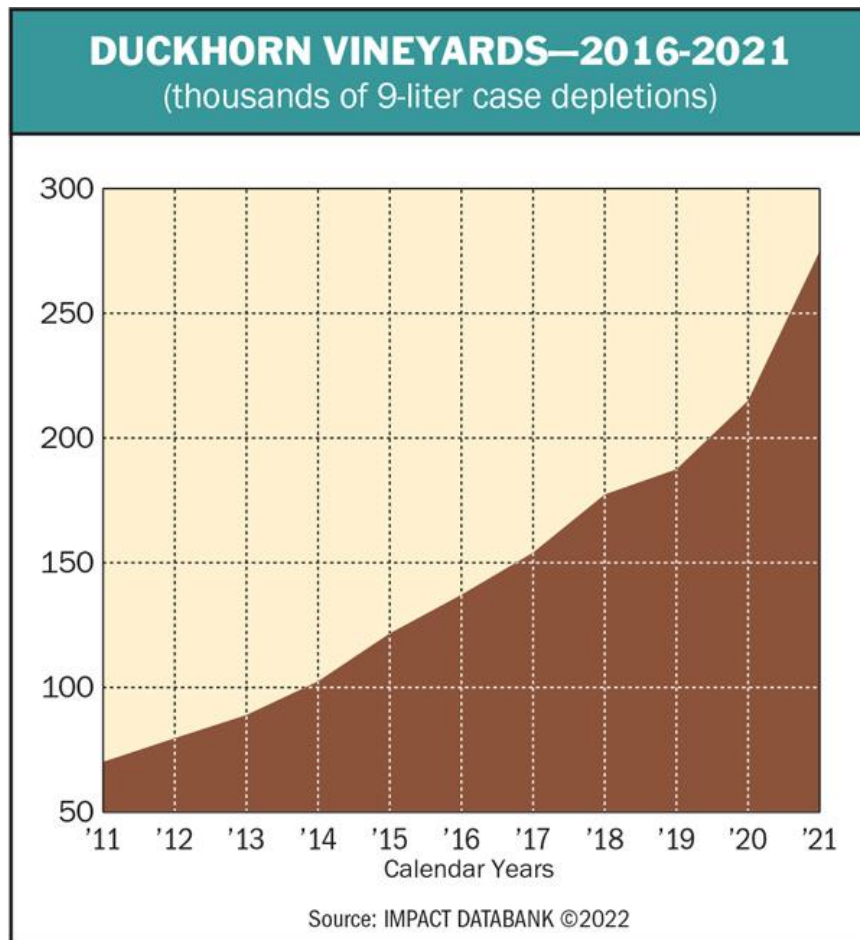
Launched early last year, the brand jumped to 365,000 cases.

E.&J. Gallo led among domestic wines with five Hot Brands, including No.-3 overall William Wycliff. After a shaky 2020, William Wycliff rebounded 18.5% to reach 1.4 million cases. Likewise, Canyon Road recovered after a poor showing during the early days of the pandemic to gain back 15% and top 1 million cases in 2021. In its second year on the market, Barefoot extension Fruitscato built on its debut 750,000 cases to improve 70% to 1.3 million cases. Fellow California label Copper Ridge reversed two years of declines with 15% growth to reach 575,000 cases. And Burlwood Cellars picked up steam on its small base to reach 365,000 cases last year, up 49%.

Bread & Butter, from WX Brands, added nearly 300,000 more cases to reach 1.1 million cases on 32% growth. The brand augmented its Everyday Wines collection in November with the national release of Bread & Butter California Merlot, which joined California rosé, California Sauvignon Blanc, and California Pinot Noir, among others, all priced at \$15 a 750-ml.

Hailing from Indiana, Oliver Winery & Vineyards qualified as a Hot Brand. The winery produces several collections, including the Soft Wine Collection that consists of Sweet Red, Sweet Red Lime, Sweet Rose, and Sweet White (all \$8 a 750-ml.). Oliver's Sweet Red is a top-20 national bestseller within sweet wines, according to the company. Oliver also produces Vine Series Moscatos, Beanblossom Hard Cider, and Camelot Mead, among other products. Volume was up 15% last year to reach 740,000 cases.

At The Wine Group, Imagery Estate Winery and Cupcake Lighthearted received honors. Imagery Estate, which markets wines ranging from \$17 to \$65 a bottle, saw a 26.1% jump across its portfolio to reach 261,000 cases, up significantly since it was below 100,000 cases as recently as 2018. And Cupcake LightHearted, a low-cal line extension, more than doubled its volume to 250,000 cases in its second year of existence.



The Duckhorn Portfolio caps its triumphant 2021—during which the company went public—with both Decoy by Duckhorn and Duckhorn Vineyards earning honors. Decoy was No. 4 on the list with nearly 1.3 million cases, continuing to drive growth for the company, which saw overall sales go up 24% to \$337 million in its last fiscal year. The Duckhorn Vineyards label also performed well, accelerating to 28% growth to reach 275,000 cases.

Duckhorn’s vice president of consumer marketing, Belinda Weber, attributes these gains to accelerated growth of existing wines, Decoy Limited’s introduction, and excellent consumer reaction to the new releases. The pandemic boosted Duckhorn’s presence in the off-premise in the early days of Covid and the trend appears to be continuing. “Since then, we’ve been pleased that the off-premise channel has continued to grow, albeit not at the rate of 2020, but we’ve continued to see growth even as the on-premise has slowly rebounded,” she says, adding that this year the company plans to boost distribution for Decoy Limited and hopes to increase both Decoy and Duckhorn Vineyards’ on-premise presence.

Precept Wines saw its House Wine label and New Mexican wine Gruet reach Hot Brands status. House Wine continues to experiment with new packaging and product types, marketing traditional bottles, cans, boxed wine, and frozen wine cocktail pouches. The Washington State brand tacked on

an additional 10% to come close to 650,000 cases last year. Gruet, which has tasting rooms in Albuquerque and Santa Fe, has several vineyards spread across the Land of Enchantment all above 4,000 feet of elevation that benefit from the desert's severe temperature shifts between day and night. Its sparkling wines were up 14% to 250,000 cases.

Elsewhere, Justin Vineyards & Winery's eponymous label accelerated again, improving 13.6% to grow to 385,000 cases. The company's multiple vineyards in Paso Robles are composed of soil similar to that of Bordeaux, helping in the effort to grow Bordeaux-style California wines. Daou Vineyards made the list in a stellar year that saw sales surge ahead more than 100,000 cases, making for 2021 volume of 465,000 cases. And Fitvine, a "better-for-you" brand, gained traction as it rose to 375,000 cases.

Trinchero was honored with three winners: Seaglass, Sycamore Lane, and alcohol-free Fre. After a challenging 2020, Seaglass rebounded to new highs, reaching 438,000 cases on 21% growth. Likewise, Sycamore Lane recovered nicely, growing 31% for 2021 volume of 377,000 cases. Fre, unique on the list as the only alcohol-free brand, benefitted from increasing interest among consumers in reducing their alcohol consumption as trends like Dry January gain traction. It accelerated to 24% growth as it surpassed 300,000 cases last year.

2021 IMPORTED WINE HOT BRANDS ^{1,2}								
(thousands of 9-liter case depletions)								
Brand	Importer	2018	2019	2020	2021	Percent Change ³		
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Stella Rosa	Riboli Family Wine Estates	2,070	2,481	5,775	7,254	19.9%	+	25.6%
La Marca	E.&J. Gallo Winery	1,600	1,920	2,400	2,725	20.0	25.0%	13.5
19 Crimes ⁴	Treasury Wine Estates Americas	1,575	1,629	2,178	2,387	3.4	33.7	9.6
Kim Crawford	Constellation Brands	1,327	1,366	1,615	1,810	2.9	18.3	12.0
Santa Margherita	Santa Margherita USA	584	584	642	752	*	9.9	17.1
Luc Belaire	Sovereign Brands	175	189	429	721	8.0	+	68.0
Veuve Clicquot	Moët Hennessy USA	535	539	548	660	0.7	1.6	20.5
Moët & Chandon	Moët Hennessy USA	441	434	462	550	-1.5	6.4	19.0
Whitehaven	E.&J. Gallo Winery	300	345	440	535	15.0	27.5	21.5
Franzia Rich & Buttery	The Wine Group	-	151	325	420	*	*	29.2
Opera Prima	CIV USA Inc.	185	279	190	358	50.8	-31.9	88.4
Total Hot Imported Wine		8,793	9,918	15,006	18,172	12.8%	51.3%	21.1%

* Less than 0.05%.

¹ Criteria:
 Established brand with double-digit growth each year in 2019, 2020 and 2021
 Established brand with at least 15% growth from 2020 to 2021
 Special consideration top ten brand with at least 5% growth in 2021 and at least 15% growth since 2018

² Calendar 2021 minimum volume requirement = 200,000 cases

³ Based on unrounded data

⁴ Includes some California wine

Source: IMPACT DATABANK ©2022

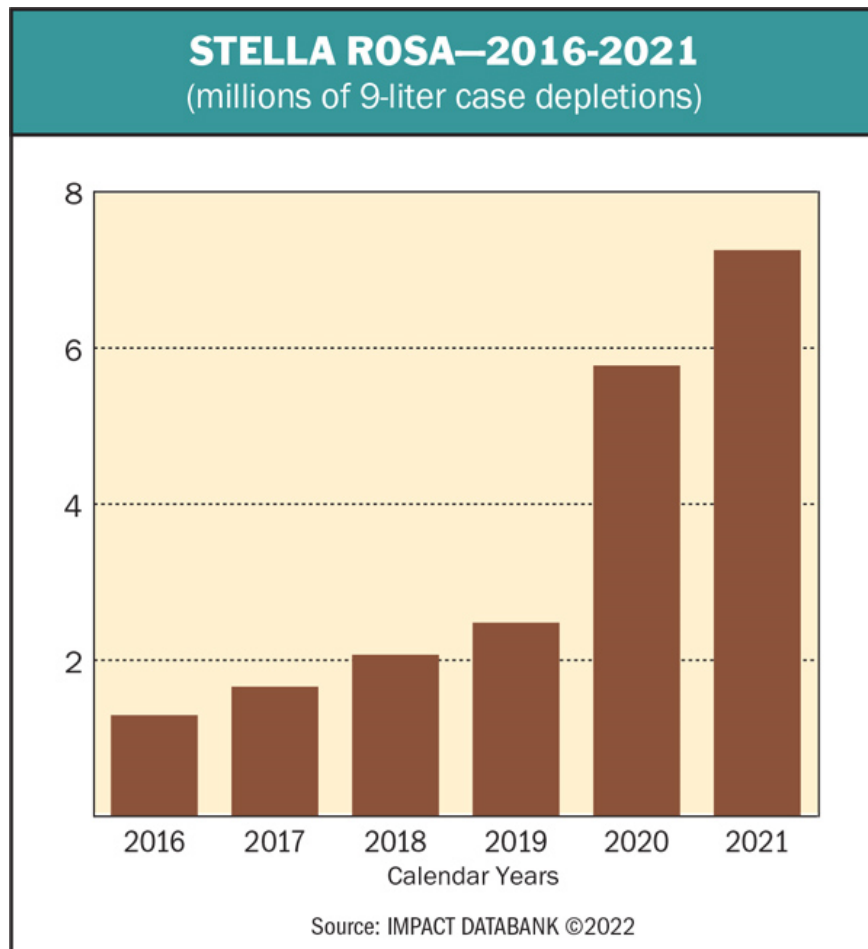
Imported Wine: Diversity On Display

Impact's imported wine Hot Brands roster features 11 entries this year, with sparkling wines comprising half the list. The award winners showcase a diverse range of origins, and include three brands each from France and Italy, as well as fast-rising labels from Spain, Australia, and New Zealand.

Representing Italy is Riboli Family Wines' Stella Rosa brand, which has nearly tripled in size since 2018 and now ranks as the second-largest imported wine label in the U.S. after Yellow Tail. Stella Rosa has also entered the top 10 wine brands in the U.S. overall, on volume of 7.25 million cases. Perhaps most impressively, Stella Rosa is now the U.S. market's largest-selling above-\$10 wine by retail value—and the top import. Most recently, Riboli targeted the low- and no-alcohol trend with the release of Stella Rosa Non-Alcoholics in January. Retailing at \$11 a 750-ml., the new line includes Black, Red, Rosé, and Peach offerings, each of which have about 30% less calories than the original alcoholic versions of the same wines and are suggested to be served chilled or over ice.

Also from Italy, Santa Margherita earned Hot Brand honors after jumping 17% to 752,000 cases last year. Known for its flagship Pinot Grigio, Santa Margherita has seen other wines like Prosecco and Chianti Classico contribute impressive gains lately. "Our Prosecco Superiore DOCG continues to be a market leader in the luxury (above \$20) Prosecco category and has consistently grown year over year," says Santa Margherita USA CEO Vincent Chiaramonte. "Our Sparkling Rosé is also doing well in the \$20-plus range. Chianti Classico Riserva is one of the fastest-growing labels in our portfolio, and we don't see that changing anytime soon. Last July, we introduced Santa Margherita Rosé in seven states and the response has been overwhelmingly positive. And Rive di Refrontolo is a celebration of the best of the Prosecco area. We target this product for on-premise and the accounts that understand and want Proseccos of this caliber."

E.&J. Gallo-owned La Marca Prosecco likewise continues to soar in the sparkling wine segment, which it now leads, selling roughly triple the volume of the next biggest import brand. Gallo recently added a Prosecco Rosé (\$17) to the La Marca portfolio, joining its original Prosecco and higher-priced Luminore Prosecco Superiore in the lineup. While percentage growth decelerated to 13.5% last year, La Marca still tacked on more than 300,000 cases in 2021, on top of a nearly 500,000-case gain the previous year.



At the higher end of the sparkling wine category, Moët Hennessy USA’s two lead Champagne brands—Veuve Clicquot and Moët & Chandon—both earned Hot Brand awards, with volume up 21% and 19% respectively in 2021. Both brands have added about 100,000 cases to their respective totals over the past three years, and they now combine for U.S. volume approaching 1.2 million cases, dominating the Champagne category. Among all wines in the U.S. priced above \$25 a 750-ml. bottle at retail, Veuve Clicquot and Moët & Chandon lead all brands in terms of retail dollars. The two brands helped carry Moët Hennessy to nearly \$6 billion in global sales for 2021, up 26% organically from the prior year. The luxury drinks group’s sales also outstripped pre-pandemic 2019 by 9%, and profit from recurring operations grew 34% organically year-on-year, to \$1.9 billion, registering 8% above 2019 levels.

France’s Hot Brand contingent also includes a sparkler, Luc Belaire, marketed by Sovereign Brands. Luc Belaire, which retails in the \$25-plus category, has seen growth rates similar to many of the leading Prosecco brands while retailing for \$10-\$15 more per bottle. Currently, the brand does roughly 90% of its sales in the off-premise, according to Sovereign Brands CEO Brett Berish. “This has been eight or nine years of consecutive growth to get here,” he says. “At some point there’s a tipping point with all brands and we’re starting to hit those.” Last fall, Pernod Ricard took a minority

stake in Sovereign for an undisclosed sum, a deal which has the potential to further boost the company's prospects.

Rounding out the sparklers on the imported wine Hot Brands list is Opera Prima from CIV USA. Opera Prima, a Spanish bubbly produced via the Charmat method, boasts a wide portfolio, including Brut, White Moscato, Blue Moscato, Pink Moscato, and Orange Pleasures. The brand has been on a wild ride the past few years, soaring in 2019 before stumbling the following year amid the initial outbreak of the pandemic. In 2021, Opera Prima recouped those pandemic losses and more, nearly doubling in size to 360,000 cases. In addition to Opera Prima, the CIV USA portfolio includes Spanish D.O. wines like Pata Negra, and varietal wines and sangria under the Don Simon and San Simon labels. Parent company J Garcia Carrion is the fourth-largest wine marketer worldwide with annual volume of approximately 37 million cases, according to Impact Databank.

Two brands from the high-flying New Zealand segment received Hot Brand nods this year, Kim Crawford from Constellation and Whitehaven from Gallo. Whitehaven cruised past the half-million case mark last year after advancing by 21.5% in 2021. Kim Crawford, meanwhile, continues to be among the premium brands driving growth for Constellation, with volume expanding by more than 450,000 cases over the past three years to arrive above the 1.8-million-case mark by the end of last year. Over the past year Kim Crawford debuted a new lower-calorie line of wines called Illuminate, targeting the wellness segment. The range initially includes Sauvignon Blanc and Rosé offerings retailing at \$18 a 750-ml. The Illuminate wines, which are at 7% abv and have 70 calories a glass, use spinning cone technology to reduce the alcohol from a portion of the base wine without impacting its aromas or flavor profile, according to the company.

Also from Down Under, Franzia Rich & Buttery is off to a fast start after debuting in 2019, reaching 420,000 cases on 29.2% growth. Treasury Wine Estates' 19 Crimes brand is now approaching 2.4 million cases in the U.S., after rising by 10% last year. The 19 Crimes range has gotten a further boost from the addition of California wines like Snoop Cali Rosé and Martha's Chard—partnerships with Snoop Dogg and Martha Stewart, respectively—which are bringing new consumers into the franchise. "Not only has 19 Crimes seen 70% new consumers to the brand with Snoop Cali Red, but 27% of consumers are new to wine—no other wine brand is bringing new consumers into the category at that rate," says 19 Crimes vice president of marketing John Wardley. "With the introduction of the Snoop wines we are attracting younger consumers and seeing greater diversity across our consumer base."

2021 RTD HOT BRANDS—SPIRITS & WINE^{1,2,3}

(thousands of 9-liter cases)

Brand	Company	2018	2019	2020	2021	Percent Change ⁴		
						'18-'19	'19-'20	'20-'21
High Noon Sun Sips	Spirit of Gallo	-	738	2,950	8,835	-	+	199.5%
Monaco	Atomic Brands	577	1,110	1,522	1,910	92.3%	37.1%	25.5
Rancho La Gloria	Patco Brands	223	427	1,300	1,690	91.6	+	30.0
1800 Ultimate Margarita	Proximo Spirits	515	598	973	1,245	16.0	62.8	28.0
Cutwater	Cutwater Spirits (ABI)	195	350	840	1,235	79.5	+	47.0
Devils Backbone	Devils Backbone Distilling Co.	-	-	175	1,050	-	+	+
Crown Royal	Diageo North America	-	-	30	975	-	+	+
Bacardi ⁵	Bacardi USA Inc.	259	252	583	871	-2.7	131.0	49.3
Buzzballz Chillers	Southern Champion	115	233	414	684	103.2	77.3	65.4
Beatbox	Future Proof Brands	50	100	198	480	100.0	98.5	141.8
Long Drink	The Long Drink Co.	20	33	221	467	63.5	+	111.2
Canteen	Canteen Spirits	-	9	308	439	+	+	42.7
Buzzballz Cocktails	Southern Champion	253	272	325	423	7.5	19.6	30.0
On the Rocks	Beam Suntory Inc.	-	-	198	416	-	+	109.7
Ketel One	Diageo North America	-	-	40	400	-	+	+
Uptown	Southern Champion	-	8	142	371	+	+	161.3
Two Chicks	1821 Fine Wines & Spirits	69	80	104	325	16.4	29.1%	+
Absolut Cans	Pernod Ricard USA	-	-	149	319	-	+	113.6
Total Hot RTDs		2,277	4,211	10,472	22,135	84.9%	+	111.4%

¹ Ready-to-drink, low-proof beverages

² Criteria:

Established brand with double-digit growth each year in 2019, 2020 and 2021

Established brand with at least 15% growth from 2020 to 2021

³ Calendar 2021 minimum volume requirement = 250,000 cases

⁴ Based on unrounded data

Source: IMPACT DATABANK ©2022

Premixed Cocktails Gain Steam

Wine- and spirits-based RTDs are among the most ascendant categories across beverage alcohol. For this year, 18 wine- or spirits-based ready-to-drink brands made the grade. Consumers show a clear preference for spirits-based drinks, with 14 of the 18 winners made using spirits. Vodka stands out as a consumer favorite, with three winners exclusively using vodka, and seven others marketing at least one vodka cocktail. Tequila is also a popular choice for spirits-based RTDs with many companies offering Margaritas or variations on the Tequila Soda.

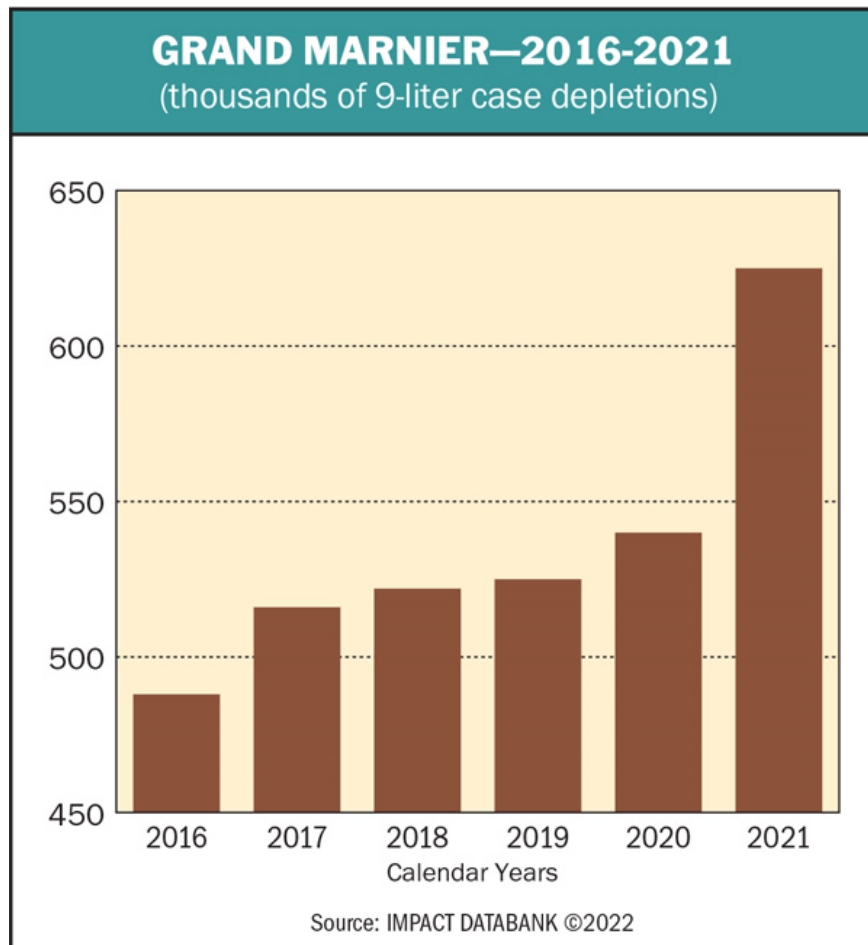
The largest brand in this category remains E.&J. Gallo's High Noon Sun Sips, which reached 8.8 million cases last year, up 199.5%. The brand—made of vodka, fruit juice, and seltzer and canned at 5% abv—only took three years to reach the upper echelon of the whole American wine and spirits market, joining only a handful of brands above 5 million cases. High Noon's RTDs come in eight flavors, seven marketed individually, and one, Passion Fruit, available in a limited time variety 8-pack

of cans. With its simple, three- part formula, there's plenty of room for Gallo to expand its offerings. If High Noon's trajectory continues, it could potentially become a top five spirits brand in the U.S. by the end of this year.

Behind High Noon is Atomic Brands' Monaco at just over 1.9 million cases. Last year, the brand grew by nearly 26%, adding roughly 400,000 cases in the U.S. Monaco's cocktails—all at 9% abv—primarily use vodka and Tequila, and come in three collections: the company's own created cocktails, three craft cocktails, and a line of vodka sodas. Patco Brands'/MPL Brands' Rancho La Gloria is the largest wine-based RTD to earn a Hot Brand honor. Last year, Rancho La Gloria added more than 300,000 cases, reaching 1.69 million cases on a 30% surge. The Margarita-focused brand offers bottled, canned, and frozen cocktails in a variety of fruit flavors made from agave wine and packaged at 13.9% abv for the bottles, 9.9% for the carbonated cans, and 6% for the freezable popsicles. Last November, The Wine Group took a minority stake in the company.

Southern Champion's Buzzballz Chillers, at 684,000 cases on 65.4% growth last year, is the second-largest wine-based RTD to earn a Hot Brand award. The Chillers line consists of 12 cocktails packed in 187-ml. ball-shaped containers in a variety of fruit- or cream-based flavors, all at 15% abv. Buzzballz also earned a Hot Brand award for their line of spirits-based RTDs, which reached 423,000 cases last year, up 30%.

Future Proof Brands' BeatBox, a first time Hot Brand winner, grew by more than 100% last year after also roughly doubling in each of the two prior years. BeatBox's wine-based cocktails come in 500-ml. Tetra Paks divided into two lines: a line of 11.1% abv punches and a zero-sugar line at 6% abv. The final wine-based RTD is Uptown, another Southern Champion brand. Uptown's cocktails come in 1.5-liter bottles at 13.9% abv and reached 371,000 cases.



While many of the RTD Hot Brands are new entries created to deliver a variety of cocktails (whether using one or multiple spirits), a few of this year’s award winners are branded offshoots from the largest players in the United States. The largest is Proximo Spirits’ 1800 Ultimate Margarita, which came in at 1.25 million cases last year, growing by 28%. The brand comes in six flavors and is one of the mainstays of the RTD category, predating the newer canned brands.

In whisky, Crown Royal’s cocktails reached 975,000 cases last year, only their second year on the market, after starting from a base of 30,000 cases in 2020. The brand recently launched its first limited-edition offshoot, Whisky Lemonade, and announced that the entire RTD line would enter national distribution. Ketel One RTDs also earned a Hot Brand award, hitting 400,000 cases.

Bacardi’s eponymous line of spirits-based RTDs covers both canned and bottled offerings and reached 871,000 cases last year, up 49%. While Bacardi has offered ready-to-serve cocktails for years, the company’s pivot to ready-to-drink cans has given the label a tremendous boost. Another brand offshoot to earn a Hot Brand award is Pernod Ricard’s Absolut Cans, which debuted in 2020 and grew to 319,000 cases last year.

Anheuser-Busch InBev's Cutwater reached 1.2 million cases in the U.S., achieving 47% growth. Cutwater's portfolio includes classics like the Margarita, Bloody Mary, and vodka and Tequila sodas, as well as offerings like a canned White Russian.

Beam Suntory's On the Rocks offers bottled cocktails made using spirits from Beam Suntory's portfolio, including a Knob Creek Old Fashioned and a Hornitos Margarita, among others. The brand—available in 100-, 200-, and 375- ml. bottles—hit 416,000 cases last year, more than doubling in size over 2020. Greg Hughes, president of Beam Suntory North America, expects to see the brand continue to expand. "It's primarily in the off-premise so far, but as we're getting supply stabilized and catching up to the demand of the off-premise, there's a real opportunity to drive growth on-premise, particularly in the 100-ml. and 200-ml. sizes in places like hotels, poolside, and golf courses," he says.

Rounding out the RTD Hot Brand winners for this year are a few brands that dabble across categories, while retaining a strong focus on vodka-based offerings. The largest of these is Devil's Backbone at just above 1 million cases. While the majority of the Devil's Backbone portfolio consists of variations on the vodka-based Smash cocktail, the company has also branched out with a Margarita, a Gin & Tonic, and a Vodka Mule. Canteen Spirits' RTDs, another vodka-focused brand, returned to the Hot Brands list after growing by 42.7% last year, reaching 439,000 cases. Two Chicks, from 1821 Fine Wine & Spirits—the U.S. subsidiary of Italian winemaker Zonin—is a new winner this year after tripling in size between 2020 and 2021. The lone gin-based RTD to earn a Hot Brand award is The Long Drink Co.'s namesake line of gin, juniper, and grapefruit canned cocktails. The brand doubled in size last year to 467,000 cases, continuing a rapid acceleration that began in 2020.