

UNIT I

The History and Culture of Whiskey

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I



Scotch Whisky

From Origins to Conglomerates

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When *Homo sapiens* was a primate of restricted distribution, members of the species sought, fought for, and found the food and drink they required to sustain their existence in the contingent natural world. The advent of agriculture, after 190,000 years of this 200,000-year story, marked the first human step back from these contingencies. Nourishment could be assured by use of the natural cycle; it was no longer exclusively nature's gift. A garden had been cut on nature's back. Human agricultural activity over the subsequent 10,000 years has been frenzied. It has been marked by successful domestications of wild species and by increasing sophistication in the preservation of foods.

Let us now briefly imagine a shopping basket of some daintiness. It contains one mackerel, one apple, and one can of cola. The mackerel is preagricultural. It has been snatched from marine autonomy. Its bright eye will quickly dim; its silver blue iridescence will fade and tarnish; it will soon stink, rot, and attract a different set of species from our own.

The apple—large, fleshy, and attractively pigmented—is classically agricultural. It is bred over decades, then carefully grown, harvested, stored, transported, and stickered with the name of its variety and country of origin. It is, as an object, still a gift of nature: it requires a particularly patterned growing season and will show seasonal variability, which, together with its precise origin, condition its finer qualities. It will quickly decay if not preserved by controlled atmosphere storage.

The can of cola is a postagricultural triumph. Its contents are a mixture of modified natural products (such as extract of spent coca leaf, extract of vanilla, extract of cinnamon, and caramel) and chemical products (such as caffeine and phosphoric acid). The drink on which it is modeled, Coca-Cola, is produced as a concentrate, then shipped to packagers for manufacture and sale in over two hundred countries. The Coca-Cola ideal is that the drink should be uniform, consistent, and stable wherever it is sold. Such an ideal is more industrial than agricultural. It will, admittedly, decay, but so do machines; the rate of decay, though, is far slower than for any equivalent freshly grown agricultural products whose nutritive function is mimicked by soft drinks, such as apples, plums or pears.

Dainty; yet this basket is a gauge of human development. Let us add a bottle of Scotch whisky. Where in this spectrum does it fall, and what are the implications of its nature on those who produce and consume it?

Whisky: Agricultural or Industrial?

The ingredients of Scotch malt whisky are simple: malted barley, water, and yeast. Scotch grain whisky extends the ingredient list, but not by much (wheat, corn). Blended whisky is a mixture of malt whisky and grain whisky. Plain caustic caramel (EU additive E150a) can be used to adjust the color of Scotch whisky.



The growing of barley is an agricultural activity. Yields vary by season and variety. The barley (and other grains) used to make Scotch whisky can be grown anywhere in the world. No variety is specified by law, but large distillers tend to use a very narrow range of specified varieties. Some claim that barley variety and origin is significant; others counter that provided a strain capable of giving the correct flavor profile and desirable alcoholic yield is used, the significance of exact variety and origin is sentimental.¹

The brewing water used by some malt whisky distilleries could be described as agricultural in origin, in that it is “wild” loch water, burn water or spring water. Other distilleries use untreated municipal supplies.²

Yeast is a microorganism farmed and harvested by manufacturers with consistency as an avowed aim.

Whisky distillation takes two forms: single or continuous distillation (for grain whisky) and double distillation (for malt whisky). Both are closely monitored industrial processes whose aim is consistency in the quality of the “new make.” The creation of flavor in these freshly distilled spirits remains, even today, imperfectly understood, but distillers assiduously duplicate the exact form and design of still components during maintenance programs at individual distilleries so as not to jeopardize this prized consistency.

The aging of whisky, by contrast, takes place in secondhand casks. These casks are often further reconditioned to extend their lives. No two casks, thus, are alike, and their effect on new-make spirit of consistent quality is to render it inconsistent. The removal of these inconsistencies is one reason that most whisky is blended. Even single malt whiskies are, when sold by the brand owner, blended to achieve a consistency that can be recognized and cherished by the consumer.³

It may be disagreeable to most whisky lovers, then, but it is hard to reach any conclusion other than that a modern bottle of whisky is, like a can of cola, a postagricultural triumph whose ideals are more industrial than agricultural. Its ingredients may be simpler and more uniformly agricultural



in origin than those of cola, yet whisky aroma and flavor are overwhelmingly a consequence of the processing of those raw ingredients (malting, brewing, distillation, wood aging) rather than the ingredients themselves. Industrial consistency rather than the qualitative speckling more typical of agricultural products is the ideal in each of these four operations. The diversity offered to consumers in the range of Scotch on sale seems likely, thus, to be more directly a consequence of manufacturing techniques and brand-building endeavor than of earth, stone, and sky.⁴

Whisky and Origin: A Chimera?

There is no more contentious topic in the study of Scotch whisky than the extent to which origin may or may not affect whisky flavor. ‘Origin’, in this context, is roughly analogous to the concept of *terroir* (‘placeness’) in wine. It refers to any factor related to the origin of the ingredients from which a whisky is made, or to the natural conditions prevailing in the locations in which that whisky is made and aged, which leave a palpable sensory stamp on the finished spirit.

Scotch whisky must, by law, be distilled and aged in Scotland. Most would agree that Scotch has a recognizable aroma and flavor. Is that aroma and flavor related to the Scottishness of its origins or rather to the whisky-making recipes, equipment, and practices prevalent in Scotland? The question is hard to answer conclusively since no other whisky-producing country possesses identical equipment or follows identical practices. Where determined efforts have been made to mimic that equipment and those practices (as most famously in Japan), the results have been close enough, labels concealed, to leave tasters nonplussed as to which is which.⁵ Japanese malt whiskies, indeed, have “outscored” Scotch malt whiskies.⁶

By contrast, few, if any, Scotch whiskies could be confused by even untrained palates with bourbon. Bourbon, though,



is distilled principally from corn in column stills and aged in new and usually highly charred casks. These differences (especially the third, since the first two are shared by many grain whiskies) have dramatic flavor consequences. These differences, though, derive from practice rather than origin.

Aging whisky in the cool, moist, temperate climate of Scotland rather than in the much warmer and drier climate typical of bourbon-producing regions of the United States does indubitably have an effect on the flavor of the spirit. This effect can, in part, be calibrated by the fact that bourbon loses more volume than does Scotch during maturation, and that bourbon gains strength during maturation whereas Scotch loses strength during maturation.

The “Scottishness” of the average bottle of Scotch, thus, is based on a mixture of non-*terroir* factors (recipe, equipment and distilling and aging techniques) and one *terroir* factor (the climate in which the whisky ages).

Blended whisky dominates world sales of Scotch.⁷ Blended whiskies mix grain whisky with malt whisky, habitually in a ratio of around 60:40. Distillers of grain whisky make no claims that the character of their product is affected by origin.

Distillers of malt whisky do make such claims. Blended whiskies, by contrast, are usually composed without any overt reference to their character deriving from the precise origins of their malt components.⁸ The only origin claimed for most blends is Scottishness and, as suggested above, this is likely to be more a consequence of recipe, equipment, and process than origin, though both play a part.

How legitimate are the claims made that malt whisky reflects origin? The creation of flavor in finished bottled whisky is a hugely complex equation. Given that it is a complex matter, I hope that the following abbreviated summary of the industry consensus may be forgiven.

Differences in barley, yeast, and water are usually regarded as being of minor significance in flavor creation, with the exception of peating levels and the kilning of the malt itself,



which are evidently major factors in flavor creation. Differences in brewing practices are regarded as being of minor significance. Differences in still shape, condenser design, and distillation practice are regarded as being of major significance. Differences in wood-aging regimes are regarded as being of major significance. The precise location within Scotland in which wood aging takes place is regarded as being of minor significance. The major flavor factors, thus, are the peating (or lack of it) of the malt, distillation itself, and wood aging.⁹ None of these is affected by origin. Malt peating levels are a recipe decision; distilling is an industrial technique of considerable refinement; and wood aging is a question of stock management with flavor implications. Origin could only play a role via the precise source and variety of the barley, the water supply, or the atmospheric conditions in which the whisky passes its aging period. The industry consensus is that these are relatively unimportant matters—though those who disagree with this consensus do so energetically.¹⁰ If the consensus is correct, the impact of origin in the creation of malt whisky flavor is, indeed, largely chimerical.

The Whisky Distillery and Its Customers

The distillation of Scotch whisky first flourished on farms and was practiced by farmers as a way of using and preserving surplus grain at quiet moments in the farming cycle.¹¹ What sort of an entity is a distillery today?

Recently there has been a small renaissance in farm distilling,¹² but most grain and malt whisky distilleries have no farming dimension whatsoever. Widespread farm distilling drew to a close when it was rendered illicit by licensing legislation; this favored larger production units.¹³ The invention of the continuous still and the commercial innovation of blended whisky that followed hastened this process.¹⁴ Distilleries, today, are factories for turning cereal grains into potable spirit, albeit factories often located in picturesque



locations. Raw materials are delivered, transformed on site, and dispatched for aging or bottling elsewhere. The prime concern of most distillery managers is efficiency in producing a consistent product to an agreed specification. Innovation (other than maximizing efficiency) does not figure in their job description.

Given that 89 percent of all Scotch is sold in blended form, custom for the vast majority of Scotch whisky distilleries, malt distilleries included, comes from large whisky blenders. Even comparatively well-known distilleries producing spirit of recognized high quality sell a tiny proportion of their production to the public in bottled form under the distillery name.¹⁵ The product known by most consumers as “Scotch” is finished by the blending process. Whisky distilleries, therefore, are factories producing large quantities of a semifinished, unpackaged product largely sold to other commercial clients.¹⁶

Whisky and Time: The Sleeping Cask

Scotch whisky has a fourth ingredient in addition to grain, water, and yeast: time. It comes into being only after three years’ cask aging. (Prior to that, it is “Plain British spirit.”) Most standard blends have an average age of about five to nine years. Most malts are sold between their tenth and twentieth birthdays. The average length of time stocks are held before sales within the industry as a whole is six years. In 2007, 1,135 million bottles of Scotch were exported, and a further 102 million bottles were consumed in the United Kingdom; much of this total would have been distilled prior to 2002, and been sitting in the cool darkness of a cask in a Scottish warehouse ever since. Total whisky production for 2008 is estimated to be around 443 million liters of pure alcohol.¹⁷ UK Customs & Excise does not publish stock figures, but the overall stock of Scotch is thought to be well over 3,000 million liters of pure alcohol. Financing these colossal stocks requires major capital investment. The necessity of



aging whisky before selling it means that the return on capital for those producing whisky is slow. It is, as a consequence, hard for smaller entities to compete with larger ones in the distilling and aging of Scotch.¹⁸

Selling Whisky: The Inescapable Brand

Almost all Scotch whisky is sold under a brand name. Brands provide the mental map that enables consumers to make choices among different whiskies. Brands promise universal consistency and reliability. In this, they are predicated on an industrial ideal rather than the agricultural ideal of winning provisional and temporary excellence from the variability and contingency offered by nature.

Within a free market, the chief means of bypassing the power of the brand is by offering generic products of one sort or another to the consumer. Supermarket label products purport to do this, though it could be argued that they are in fact products carrying the supermarket's own brand. Drugs are sometimes made available to the impoverished needy on a generic rather than brand name basis. And wine, too, is widely sold by type rather than by brand via the use of appellations. Appellations are not brands; they are, rather, guarantees of origin (and sometimes of more than that: alcoholic strength, varietal composition, and production practices, for example). Although they are not brands, appellations function as brands for the brandless. Small producers with no market presence or reputation and no possibility of creating either are nonetheless able to render their products intelligible and desirable to consumers by the use of an appellation. The wines of a competent but not outstanding wine grower with four hectares (approximately 9.88 acres) of vineyard in Sancerre will never acquire notoriety in New York. But, sold as Sancerre, his wines will find a ready market among New York's fish lovers.



Appellations do not yet exist for Scotch whisky, though five “regional names”—Highland, Lowland, Speyside, Campbeltown, and Islay—are due to receive legal definition in a forthcoming revision of Scotch Whisky Regulations, expected to be on the statute book in early 2009.¹⁹

Appellations would have little to offer the creators of blended whisky, which as we have seen accounts for nine out of every ten bottles sold worldwide, since blends mingle grain whisky with a wide spectrum of malt whiskies.

If, as suggested above, the impact of origin in the creation of malt whisky flavor is largely chimerical, appellations would have little to offer malt whisky either. The whiskies of Islay come closer than most to incarnating an origin-derived generic ideal susceptible to purchase by appellation rather than brand. Yet, even on Islay, brands are dominant because there are stark flavor differences among Islay whiskies, and because those differences are derived from recipes and production decisions rather than the nuances of origin.²⁰

Malt whiskies are origin-coded brands, whereas blended whiskies are fantasy brands of occasional historical pedigree. Whisky producers prefer the freedom of brands predicated on blends to those which commit them to a single distillery of origin for obvious reasons: the size of distilleries is finite, whereas blended brands can continue to expand almost indefinitely to soak up market need. For example, in December 2003, Diageo redefined its Cardhu brand from being a single malt made at the Cardhu distillery to being a vatted (blended) malt “inspired” by the character of Cardhu. (Cardhu is a core malt for the world’s most successful blended whisky brand, the Johnnie Walker family. It was also hugely successful as a single malt on the Spanish market.) To Diageo’s surprise and discomfiture, the move was widely criticized, underlining at least a sentimental attachment to the notion of origin for malt brands. Sales of Cardhu fell, and the move was reversed in 2006.

The whisky world has many brands but relatively few powerful brands. Those powerful brands are, at present, growing



still more dominant at the expense of smaller rivals. Audited, or “official,” figures are unobtainable, but the leading industry source estimated that for 2004, the Famous Grouse Finest had 3.4 percent of the total whisky market; 100 Pipers, 3.42 percent; Chivas Regal brands, 3.92 percent; Dewar’s White Label, 4.92 percent; Grant’s, 5.17 percent; Ballantine’s brands, 7.02 percent; J&B, 7.48 percent; and the dominant Johnnie Walker brands, 21.49 percent of the market.²¹ Since 2004, Johnnie Walker’s global sales have grown further—by over three million cases.²²

Whisky and Difference: The Comfort of Consistency

The play of brands, large and small, within the worlds of malt and blended whisky purport to offer the consumer a wide spectrum of aroma and flavor differences. Do they deliver this?

The uniformity of ingredients and processing techniques used to make Scotch whisky gives the drink a much narrower organoleptic spectrum than, say, French wine or Belgian beer. Nonetheless, for the tiny percentage of consumers purchasing single-cask bottlings of malt whisky, those aroma and flavor differences are real. The provocatively elaborate tasting notes of the Scotch Malt Whisky Society, for example, are not fiction. The sensorial wonderland of allusions they promise can be discerned by attentive and enthusiastic tasters.

Distillery bottlings of malt whisky, too, offer aroma and flavor differences to consumers, though perhaps fewer than the plethora of malt brands would suggest. The ingredients used to make malt whisky are almost shockingly uniform (two yeast suppliers’ strains dominate the industry, as does unpeated malted barley in which variety plays no discernable organoleptic role). The now-dominant use of secondhand ex-bourbon white American oak casks in preference to the much more expensive ex-sherry European oak casks has added a further note of homogeneity. The differences in packaging



between two single Speyside malts of middling reputation are often starker than the differences in their contents. The recent popularity of finishes for malt whiskies (a final aging period in intensely flavor-bearing casks to add an overt aroma or flavor note to the malt) is indicative of an often-frustrated thirst for character among malt-whisky drinkers.

Finally, the aroma and flavor differences among similarly priced blended whiskies are, frankly, slight, despite the claims of those advertising them, selling them, and, sometimes, writing about them. I have passed a disconcerting percentage of the last two decades tasting beer, wine, and spirits and describing the sensorial differences among them, and there is no more challenging tasting than a blind comparison of leading brands of blended whisky. Quality is good and the products are satisfactorily constructed and nuanced, but the differences among them are feathery emphases rather than the forceful and often dramatic contrasts encountered in similar wine or beer tastings. The loyal consumers of blended Scotch whisky are evidently comforted by consistency.

Buying Whisky: The Flight from Complication

Some 90 percent of Scotch whisky is exported from its country of origin, and 89 percent of that total is blended whisky sold by brand name. For most global whisky drinkers, Scotch is an aspirational intoxicant. The circumstances of its production are ill understood (most brandy consumers know that they are drinking distilled wine, whereas few whisky consumers realize they are drinking distilled beer). Even its unadulterated taste, I would suggest, is often ill liked, making it the most paradoxical of commercial successes; this explains the fact that it is customarily drunk as a mixed drink. I have drunk Johnnie Walker Black Label, perhaps the greatest of all blended whiskies, mixed with cold green tea poured from a waxed paper carton in a Hangzhou nightclub. This was an act of great generosity on the part of my host, a tea merchant



with a sensitive palate; few drinks on offer were more expensive, and an entire bottle was purchased for our small party. Cold green tea was the standard mixer for the club's whisky-drinking clientele; elsewhere it would have been cola, ginger ale, lemonade . . . The whisky on its own was considered undrinkable, though the luster of its name shone brightly through the smoky nightclub gloom, and its effect brought those drinking it into a temporary communion.

Under these circumstances, complications of offer are, for the majority of whisky purchasers, profoundly undesirable. Aspirational products perform best when there is a comprehensibly limited range of brand names to aspire to. Labels and bottle shapes need to be recognized from afar within the nightclub shadows. Flavor is a tightrope: you need enough to satisfy the minority who genuinely enjoy the product itself, but not so much as to deter the majority who don't. Malt whisky may eventually replace blended whisky in the affections of the global whisky-drinking public, but if so, it will be in spite of rather than because of its complications.

The Necessity of the Conglomerate

Let us resume our discoveries. Whisky is a predominantly industrial product, most of which is sold in blended form that effaces its origins and inconsistencies. Distillery customers are overwhelmingly fellow distillers and blenders acquiring large volumes for blending purposes. The whisky business, because of its time lines, is capital intensive. The "difference" purchased by customers when they choose one whisky rather than another is chiefly external and superficial, rather than internal and profound. The blended whisky market is an international one dominated by a few brands, and the notion of the brand is cherished and valued more highly by producers than any notion of the origin of its component parts. Most consumers of whisky need simple choices and do not want distinctive or challenging flavors.



These six factors create a commercial climate conducive to participation by conglomerates (defined as large commercial entities with a substantial capital base, undertaking a range of diversified activities in a wide number of countries and continents). The subsidiary divisions of such entities (production, aging, blending, distribution, and sales and marketing) can mesh and interlink their activities on whisky's global market, achieving economies of scale as they do so. Further synergies accrue when these whisky-making and whisky-marketing activities are linked to other activities undertaken by the conglomerate elsewhere in the drinks business, or in the luxury goods business more generally. Only conglomerates, it could be argued, have the financial power and the distributive muscle to create, support, maintain, and sustain global blended whisky brands.

This does not mean that smaller entities have no role to play in the whisky market.²³ Smaller companies are highly effective service providers to conglomerates. Blended whisky has some niche markets accessible to smaller players (such as Compass Box), though not many. Small and medium-size companies with a long-term whisky pedigree and a predator-resistant ownership structure have survived in unconglomerated form thus far, and they may continue to do so. (William Grant and the Edrington Group are the two major examples.) It is, though, malt whisky above all that offers the potential for the nonconglomerate to perform and prosper. This is because the malt whisky offer is one in which there is room for complication rather than simplicity, where intense and characterful flavors are seen as an attractive trait by a minority of consumers, and where origin and difference is prized and valued. Strong malt whisky brands, indeed, can help carry the blended whisky brands of unconglomerated companies via existing international distribution arrangements. It should be noted, though, that despite its internal vivacity, the malt whisky market occupies a mere 9 percent of the total whisky market. Most malt whisky distilleries, too, are owned and run by conglomerates (often highly effectively) because



the destiny of their whiskies is overwhelmingly the blending vat. These are the reasons that Scotch whisky is conglomerate dominated and will remain so.

Conglomerate for Good or Ill

Let us now contrast the actions and status of conglomerates with those of smaller companies. It may be inevitable that Scotch whisky is at present conglomerate dominated, but is it desirable?

The Scotch whisky market is healthy. Between 2006 and 2007, for example, the volume of Scotch exported grew by 8 percent and the value grew by 14 percent, attaining all-time record figures in both cases.²⁴ For the first time since the early 1970s, new distilleries are being built (e.g., Diageo's colossal Roseile and William Grant's Ailsa Bay) and derelict or "mothballed" distilleries are being restored (such as the long-silent Annandale Distillery in Dumfries and Galloway, as well as the Speyside pair of Tamnavulin and Glen-glassaugh). Despite repeated overstocks within the industry and financial recessions outside it, world consumption of whisky has risen steadily over the past three decades.²⁵ This may be an inevitable concomitant of global economic growth, but at the very least it seems fair to say that the conglomerates involved in Scotch whisky have not acted as a check on the industry's development. Most believe, indeed, that they may be credited with both steering and satisfying the global demand for Scotch whisky astutely. The fact that the value of exports is increasing disproportionately to volume suggests, too, that the conglomerates are drawing drinkers into consuming better-quality whisky rather than simply consuming more whisky of indifferent quality: morally a sound strategy, and commercially a sane one.

Conglomerates are financially secure. Their ownership structures, names, and addresses may change and modulate, but as features of the commercial landscape, they are enduring.



This is politically, socially, and economically desirable. (Scotch whisky accounts for two-thirds of Scotland's food and drink exports, employs forty thousand people directly or indirectly, and invests £700 million (approximately \$1 billion US) with Scottish suppliers of goods and services every year.)²⁶

The marketing and distributional strength of the conglomerates involved in Scotch whisky is much admired and provides a model for the spirits business more generally. Conglomerates commit major financial resources to whisky marketing, a gesture from which the entire sector benefits. In general, the all-important heritage and image repertoire of Scotch whisky is well respected by its leading conglomerates. Scotch still appears Scottish, even when (as in Johnnie Walker's case) the ideas are created in Amsterdam, and that very broad sense of origin is strongly attractive to consumers.

The distilling and aging standards of conglomerates are high, though these are at all times industrial rather than artisanal in intent, and are designed to help create the ideal of consistency on which blends are founded.

Conglomerates, by contrast, are often poor stewards of the weaker distilleries and brands in their care. A structural flaw in any industry dominated by large players is that those players will sensibly want to put most of their energies into a relatively small number of products or brands rather than dissipate their energies over a large number of products or brands that may compete with others in the same stable. The historical outcome of this is that great malt whisky distilleries have been lost forever (St. Magdalene, Port Ellen) and others seem unlikely ever to return (Rosebank, Glenury Royal).²⁷ Once powerful and much-loved brands can have their destiny changed during a single strategy meeting and become inaccessible to loyal consumers overnight (the Antiquary, Haig, or Vat 69, to name just three); others are reformulated or disappear entirely.²⁸

Conglomerates tend to vaunt origin when it suits their marketing strategy, but they tend to ignore it when it doesn't (as in the case of Cardhu, cited earlier). Origin, in any case, is loosely



defined by conglomerates. What little Caol Ila (pronounced *cool I-la*) is sold as a single malt is emphatically marketed as an Islay whisky by Diageo, despite the fact that it leaves the island by tanker two weeks after distillation and passes the rest of its many years of prebottling life in warehouses in central Scotland. Conglomerates, moreover, are deeply conservative in terms of innovation and experiment in brewing, distilling, and aging techniques. Most distilleries are run along the strictly uncreative lines established by precedent. The only welcome innovations are those that might reasonably result in lowered costs or increased productivity. If Scotch whisky can seem overly staid and industrial to those, for example, nourished on the structural creativity of the wine business, conglomerates must take much of the blame for this.

Smaller, nonconglomerate entities have, of course, also played a key role in the present health of the Scotch whisky industry, though their importance as stakeholders has diminished in recent years. They are less financially secure than conglomerates; indeed the rise to prominence of the conglomerates has in part been built on the financial fallibilities of smaller rivals. Paradoxically, when smaller rivals are successful, their rising value also renders them vulnerable to acquisition by conglomerates, as Glenmorangie's acquisition by LVMH (Louis Vuitton Moët Hennessy) shows. In the blended whisky market, many smaller companies feel that the only commercial strategy left to them is to compete on price; such is the marketing and distributive power of conglomerates.

Much of the creativity in the malt whisky area, by contrast, has been driven by medium-size or smaller companies such as Glenfiddich, Glenfarclas, and Bruichladdich (pronounced *brook LAH-dee*), or like Glenmorangie prior to its takeover, as well as by independent merchants and bottlers. Indeed, the pioneering of single malt as a category was initiated in modern times by independents (Glenfiddich from 1963 and the Macallan from 1973). The conglomerates had to respond, though they would perhaps have been happy to sell blends alone had competition not forced them to review this policy. Origin is taken



with unrivaled and thoroughgoing seriousness only by small, independent distillery owners (Bruichladdich, Springbank, and Edradour are the only three malt distilleries to dispatch finished product from the distillery door). The radically innovative raw material and distilling experiments undertaken in recent years by Bruichladdich are unique.

The good of conglomerates, in sum, is that Scotch whisky is in a healthy state and is a desired product in almost every market in the world that welcomes alcoholic drinks (as well as some that don't). The ill of conglomerates is that Scotch whisky is a less innovative and diverse product than it might be, and that the fugitive and easily bruised notion of authenticity and origin in Scotch whisky has been further eroded as the conglomerates have risen to their present position of dominance. The global nature of the Scotch whisky market and the fact that blends have driven this global expansion mean that domination by conglomerates is inevitable. The stimulus and input of smaller, nonconglomerate companies within the whisky industry, though, provide the oxygen that nourishes the Scotch flame.

NOTES

1. On this Mark Reynier of Bruichladdich Distillery (Islay) notes, "We have 100 percent of our barley direct from specific fields and farms. Fifty percent is organically grown. Each batch is harvested, malted, milled, fermented, distilled and matured in total isolation. By nose alone, at zero age, a layman can distinguish between variety, terroir and harvest" (Mark Reynier, personal communication). Contrast this with the view of Douglas Murray, process technology manager, Diageo, Alloa: "There are thousands of barley varieties globally, and we know that they either have very poor yields or give flavors we do not want and are therefore not considered for use in the Scotch whisky industry. The chemical makeup and therefore yield and flavor of the varieties we do use are similar: that's why we use them" (Douglas Murray, personal communication). Barley variety and origin are almost never mentioned on whisky packaging.
2. Oban is one malt distillery example; all grain distilleries use municipal supplies.



3. Some malt whisky distilleries do not relish this use of the word 'blend'. As Robert Ransom of Glenfarclas notes, "Blend is a misleading term because it has different, yet similar, meanings in different contexts. . . . We prefer to say we 'marry' or 'vat' casks together to produce an expression of Glenfarclas, rather than blend casks together" (Robert Ransom, personal communication).
4. David Williamson, public affairs manager for the Scotch Whisky Association (SWA), dissents from this view: "Industrial or agricultural? We would suggest agricultural. It is important to remember that the Scotch Whisky Act and Order require that the finished spirit has the 'aroma and taste derived from the raw materials used in . . . its production'" (David Williamson, personal communication).
5. Michael Jackson et al., *Whisky* (London: Dorling Kindersley, 2005), pp. 248–249.
6. *Ibid.*, p. 250.
7. Global volume sales in 2007 were 89 percent blended whisky compared to 9 percent malt whisky and 2 percent grain whisky, according to the SWA.
8. Even where blends do make such claims, they are usually expressed in terms of no more than an inspirational keynote. Black Bottle is said to include every Islay malt—but much else besides.
9. I would suggest that apportioning the following percentages as a theoretical formula for the creation of flavor in malt whisky is roughly representative of the industry consensus:

Barley variety (assuming appropriate)	1%
Barley origin	3%
Malting (especially peated or not)	26%
Yeast type	2%
Water source	3%
Fermentation specifics	10%
Distilling specifics	26%
Type and quality of wood for aging	26%
Precise location of aging within Scotland	3%

10. See, for example, Charles MacLean, *Malt Whisky* (London: Mitchell Beazley, 1997), pp. 36–37 (water); pp. 38–39 (barley); and p. 60 (atmospheric conditions).
11. Charles MacLean, *Scotch Whisky: A Liquid History* (London: Cassell, 2003), pp. 23–32.
12. Notably at Kilchoman on Islay and at Daftmill in Fife.
13. Michael S. Moss and John R. Hume, *The Making of Scotch Whisky* (Edinburgh: Canongate, 2000), pp. 56–58 and p. 78ff.
14. *Ibid.*, pp. 82–85 and p. 108ff.



15. For example, Glenrothes, a well-known Speyside malt considered to be a “top dressing” by blenders, sells just 2 percent of its annual production of five million liters of pure alcohol as a named malt whisky of single origin.
16. The concept of finishing is a slippery one. “If matured on site,” says Robert Ransom of Glenfarclas, “the distillery does produce a finished but unpackaged product . . . as an ingredient for another product” (Robert Ransom, personal communication).
17. Alan D. Gray, *The Scotch Whisky Industry Review 2006* (Edinburgh and London: Charles Stanley Sutherlands, 2006), p. 70.
18. Though it is not impossible, especially when (as in 2008) world demand for Scotch is rising strongly. “Laying down stock,” says Mark Reynier of Bruichladdich, “is capital intensive. But it is also an appreciating asset.” Reynier also claims that historic overstocks have produced tired, over-aged whisky, and that high-quality distilling and the use of outstanding casks mean that even malt whisky can be ready sooner than the customary age statements of malt would suggest. “We have released 5- and 6-year-old whisky which has won tastings and approval ahead of much older spirits—even 30- and 35-year-old whiskies [which are] often overly woody, imbalanced and lacking vigour” (Mark Reynier, personal communication).
19. These regional names, it should be noted, will refer only to the place of distillation (a mere week or two in the life of the whisky) and do not include any requirement for the spirit to be stored in those same places (a period lasting between three and thirty or more years).
20. Two-fifths of Islay single malt is unpeated, for example, and three-fifths peated.
21. Gray, *The Scotch Whisky Industry Review 2006*, pp. 196–203.
22. Andrew Jefford, “Which Whisky to Drink on Burns Night,” *Financial Times* (January 19, 2008). Global sales of Johnnie Walker in the year to June 2006 were 15.4 million cases.
23. David Williamson of SWA notes, “The diversity of the industry remains one of its defining characteristics and one of its great strengths” (David Williamson, personal communication).
24. Scotch Whisky Association news release, April 30, 2008.
25. Gray, *The Scotch Whisky Industry Review 2006*, p. 25.
26. Scotch Whisky Association, news release, June 19, 2008.
27. Brian Townsend, *Scotch Missed: The Lost Distilleries of Scotland* (Glasgow: Angels’ Share, 2000), p. 84ff, p. 113ff, p. 116ff, and p. 176ff.
28. Charles MacLean, *Scotch Whisky* (London: Mitchell Beazley, rev. ed. 1998), p. 116ff.

