

CENTENARY 2012



scotch whisky
association

The Scotch Whisky Association

100 YEARS

OF ACHIEVEMENT

THE SWA CENTENARY PUBLICATION



Edited by
Robert McCall

£6.95

GREAT THINGS TAKE TIME

CHIVAS BROTHERS
SALUTES THE SWA ON ITS
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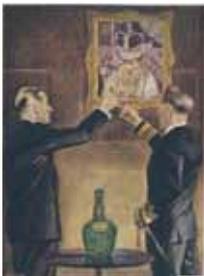
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OVER 500 YEARS OF SCOTCH WHISKY

- an abbreviated version in four parts, taken from "500 Years of Scotch Whisky" by Robert McCall.

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Gavin Hewitt, Chief Executive, Scotch Whisky Association

FOREWORD

A birthday is always reason to celebrate; a centenary is a special occasion.

The Scotch Whisky Association (SWA) celebrates its centenary this year. The Wine and Spirit Brand Association was founded on 3 October 1912 to protect the interests of the industry at a time of considerable pressure from politicians on tax and from market forces where prices were being undercut; there was also the threat of prohibition and increasing challenges from the temperance movement. It became the Whisky Association in 1917 (with Irish Whiskey still within its remit) and was reformed in 1942 as the Scotch Whisky Association. You can read more about our fascinating history elsewhere in this souvenir centenary publication, based on the research of past records in the national archives by our in-house historian, David Williamson.

I first came across the Scotch Whisky Association when serving in Brussels as a British diplomat during the negotiations of UK entry to the European Communities in the early 1970s. It had a formidable reputation then for lobbying and negotiation; Ambassadorial doors were opened for it in a way not accorded to other trade bodies; the Association was recognised for an unparalleled understanding of the way governments worked and did their business, which is needed for effective lobbying, and of the ways the market worked. I regularly came across the SWA at other times in my diplomatic career, although my contacts with it were more remote.

My appointment as Chief Executive of the SWA in 2003 was a big moment. I had decided to leave the Diplomatic Service where I had achieved my ambitions to put something back into an area of work that I had enjoyed the most as an Ambassador – delivering success for British business. I have not been disappointed over the last nine years.

I recall these moments only to pay respect to the extraordinary work of my five predecessors in the job (whether entitled Secretary, Director General or Chief Executive) in leading the Association and motivating the executive over the last one hundred years to help our member companies give a collective direction to the industry at home and abroad.

I must also congratulate and thank our many

past chairmen for their leadership of the SWA Council and of the Association. The SWA works best when it works together. Cooperation among all our members is one of the hallmarks of the Association; from agreement on market priorities, tackling alcohol harm, production issues, supply chain concerns or scientific matters as important as greater resilience of the barley varieties we use for distilling to cope with climate change, it is the envy of many other trade bodies. That cooperation and cohesion could not be secured without the unstinting support given to the work of the Association by the senior management of our member companies when serving on the Council or chairing and participating in our meetings.

It is right to draw attention to the cooperation that the Association gets from its members, but much of its strength also comes from the executive staff without whom not much would happen or be delivered. It is invidious to pick out individuals, but I must pay tribute to the Departmental Directors and their teams who have aided and abetted me throughout my nine years of tenure as Chief Executive: Glen Barclay (Legal), Campbell Evans (Government and Consumer Affairs), Peter Wilkinson (International Affairs), Nick Soper (European Affairs), Julie Hesketh-Laird (Operations and Technical Affairs) and John Bartholomew (Finance and Administration), not forgetting Tim Jackson, Ian Shearer and Jim Devin who worked with me in the earlier years.

I give some insights in the pages which follow into the varied work of the Association. It is not an attempt to catalogue the events and achievements of the last hundred years. It is no more than a snapshot seen through more recent eyes.

I hope you enjoy reading about what we have done and continue to do to help make the Scotch Whisky industry one of the UK's leading manufacturing industries and exporters.

The Association is in very good heart. It is proud of its achievements. It knows that it delivers for its members. I am confident that it will continue to serve the interests of the Scotch Whisky industry with the same passion for the next hundred years and well beyond.

Gavin Hewitt
Chief Executive
Scotch Whisky Association



The Association's work : a snapshot of an ongoing task

by *Gavin Hewitt, Chief Executive, SWA*

Protection and promotion of Scotch Whisky – which have remained the Association's objectives from its origins - are easy words to slip off the tongue but more difficult to deliver. An industry which represents such a great and valuable product as Scotch Whisky will have its work cut out to protect the product from fake imitations. The legal team at the executive has achieved that task with considerable credit over the years. The Association is well known in legal circles and more widely for its zero tolerance policy. We will take administrative or legal action against anyone and anywhere we find fakes. The cases are unfortunately legion, and not least in some of our most developed markets where the domestic authorities should have better control. The signal success of our lawyers over the years is the fact that, unlike products such as cheddar cheese and camembert, Scotch Whisky has never been ruled by any court as a generic product which can be made anywhere. Scotch Whisky by law can only be made in Scotland. The 2009 Scotch Whisky Regulations were probably one of the most significant developments in the SWA's history, and certainly rank alongside the importance of the 1909 Royal Commission in protecting Scotch Whisky and delineating how it should be presented to the consumer.

Scotch Whisky would not have secured its international reputation without being readily on sale around the world. Go to a bar of standing in any of the 200 countries to which our members export and you will be certain to find a Scotch Whisky on the shelves. It has become truly the world's best known internationally traded spirit drink. The barons of the industry spread the product round the Empire in the late 1800s, but they did not face the level of trade protectionism from domestic markets and producers which grew during the 20th century.

Breaking down those barriers to the global market became one of the industry's top priorities in the 1980s and 1990s, just as it is today. We still face, at the latest count, over 600 barriers to trade in our major markets around the world. We continue to tackle them with vigour. Some of our greatest successes against discrimination came in the 1990s when we took action through the European Community to open up the markets in Korea, Japan and Chile. These trade challenges handed down judgements that under international trading rules all spirit drinks, whether domestic or imported, must be taxed similarly. We have used those precedents in our latest challenges to tax or tariff discrimination in countries as disparate as India, Uruguay, Thailand, the Philippines and Colombia.

to our member companies an opportunity to compete fairly with local products and put their marketing prowess into building a loyal consumer base for Scotch Whisky.

It is regrettable that the UK Government itself discriminates against Scotch Whisky, one of the few alcoholic drinks that have to be made in the UK. A campaign against tax discrimination has remained on the SWA's agenda from the days of Lloyd George. Reform of the UK excise duty regime, which is not fit for purpose, is long overdue. Our tireless efforts were rewarded in part in the 1990s and 2000s by two tax cut on spirits and a nine year standstill when the duty on other alcoholic drinks was being raised. With our swift intervention and our grasp of detail, we over-turned within twenty four hours of its announcement an

“SCOTCH WHISKY WOULD NOT
HAVE SECURED ITS INTERNATIONAL
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ON SALE AROUND THE WORLD”

The Association's work in Europe, from where many of the regulatory controls on the alcohol industry stem, is recognised through our leading position in the umbrella spirit drinks body, SpiritsEUROPE. Two EC Regulations of 1989 and 2008 shine out dealing with the definition of spirits at a European level in which the SWA played a major part.

Our successes against discrimination have been built on the back of assiduous work by the SWA market access teams over the years and the meticulous attention they have given to constructing and deploying our legal arguments. Opening up markets, whether mature or emerging, has delivered

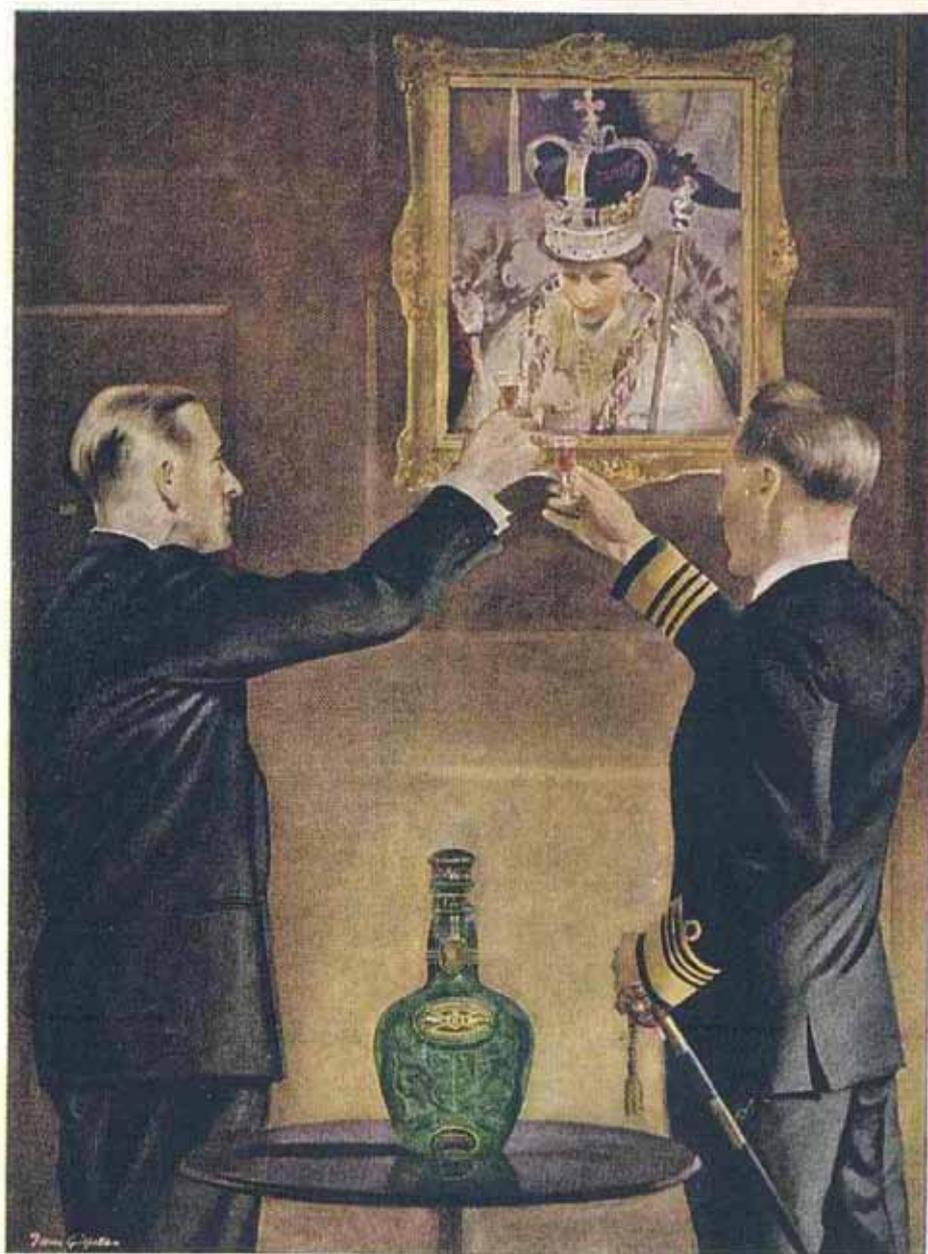
8% tax increase in 2008, with the increase of tax on spirits reduced to 4%. These victories have helped to narrow the tax gap, but Scotch by alcohol content is still taxed 250% more than cider, 37% more than beer and 30% more than wine. The executive has been at the forefront of the industry's campaigns for a fairer tax deal for the industry in the firm belief that success on the home front will set valuable precedents for tax reform in other countries. It is ironic that we are battling with the UK and Scottish Governments today on the pricing of alcohol, one of the issues – albeit in different circumstances - that brought the industry together in the

first place.

The Association has always taken its responsibilities seriously in addressing alcohol harm. Some may say that Scotch Whisky is not the problem; we believe that we can be part of the solution. In 2005, the Association issued a stringent code on the marketing and promotion of Scotch Whisky and has updated that code regularly. It remains the only mandatory code issued by EU alcohol beverage trade associations with powers given to the Association to fine and ultimately expel members for transgression. The code serves as the minimum standard expected of our members in countries outside the EU. In Scotland, the Association was one of the founding members of the Scottish Government Alcohol Industry Partnership. This partnership has issued guidance on sponsorship, alcohol in the workplace, run alcohol awareness weeks and conducted pilot studies to address alcohol abuse at local level for roll-out elsewhere.

Finally, the Scotch Whisky industry has always had green credentials. Part of our reputation lies in the pristine water and stunning natural beauty of Scotland. To bring together our sustainability and environmental concerns and practices, the Association published its first Environmental Strategy for the industry in 2009. This strategy remains to our knowledge the only environmental strategy addressing a whole industry sector in the UK. The strategy sets out stretching targets for the industry through to 2050, with interim targets for 2020, including the commitment to reduce our use of fossil fuels to 20% of our total energy requirements, use our water more efficiently, use recyclable materials for our packaging, send nothing to landfill and encouraging our supply chain from glass to transport to emulate our performance. This exercise was exhaustive; it demanded a massive commitment from our member companies in terms, for example, of new attitudes to capital investment and pay-back periods. The good news is that we are well on the way to achieving what we promised and, in doing so, have secured the admiration and support of many across Scotland, including the regulators.

This is only a snapshot of what the Association has done and continues to do on behalf of its members. If you want more information, go to our website at www.scotch-whisky.org.uk. It is a mine of information and is updated regularly. Using social media such as Facebook and twitter, you can pass on the information that intrigues you most to your friends and colleagues to bring them into the world of Scotch Whisky and the



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work of the Association.

For the Centenary of The Scotch Whisky Association

“FREEDOM AN WHISKY GANG THEGITHER”

ROBERT BURNS

A specially-commissioned poem by the Makar,
Scotland's National Poet, Liz Lochhead

i.
When we sit wined and finely dined,
Dressed up in oor best, braw and fancy,
Oh, it's a far cry tonight, in this company bright,
From the rude and hoorin howff o Poosie Nancy.

Friends, we hae a history:
Rough stuff. 'Rascally Kilbagie'
Mair fiery by faur than 'lost Ferintosh' and fit,
fit for but 'the most rascally part',
fit for but the bard's Jolly Beggars,
fit only for 'rectifying' into Hollands gin
-- in the back lanes of London,
Mother's Ruin.

Sing, drunk for a penny,
Blin fou for tuppence, quaff
An ye shall hae straw for free
When you maun sleep it aff.

ii.
Two hundred and fifty years...
How many thousand bottlings
to the honeyed finish,
aromas of lavender, sherry-cask or gorse;
essences and esters of salt, pine, nutmeg, smoke;
tinctures of topaz, amber, mahogany,
palest straw, purest gold, liquid?
Liquors, elixirs, infused with -- is that a
hint of anise, even liquorice?
Toddies tea-coloured, smooth and soothing --
can you taste tobacco, heather-nectar, rain or
moorland, smell the sea?
How many thousand bottlings, angels' shares,
new market leaders in the field,
till today's best blends and the triple-distilled?

iii.
Ask MacDiarmid, ask Ettrick Hogg --
Wha took his whisky 'by the joug' --
Ask Rab himsel, an he will tell you whether --
-- Language made essence, thought distilled --
Inspiration's whit a dram might yield
If poetry an whisky gang thegither?

Consider. Answer. Aye, right well thegither.
Though – taken by the jug-fu – either yin's reduced
to blether.

iv.
And friendship an whisky surely gang thegither?
It's the aqua vitae we imbibe wi yin another.
A hip-flask in the cauld, uncorked, a shared swig,
A deal sealed wi a word and a dram,
Och, see us a splash of water from thon china jug,
Gie us drappie in my coffee mug,
There's aye a drouth for true companionship, until at
last
The luggit cup o the quaich is passed.
Sweetness sipped from a chinked glass, cheers!
Savour friendship.
Its flavour will mature for years.

v.
And – if freedom an whisky gang thegither –
How do you like your freedom? Swallowed neat?
Distillations of history, language, weather
In an usqueba o barley, burn water, peat.

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Ardbeg distillery manager supervising the loading of casks at Ardbeg Pier 1906

Protecting and Promoting Scotch Whisky:

The Scotch Whisky Association, 1912-2012

by David Williamson, Deputy Director,
International Affairs Department, SWA

From a Royal Commission aimed at deciding 'what is whisky?' to falling sales in the home market, the early 20th century was a challenging time for Scotland's distillers. The situation was compounded from the despatch box when the Chancellor of the Exchequer, Lloyd George, dramatically raised taxes, including on whisky, to help fund social reforms.

Against this backdrop, through the summer of 1912, a series of conferences were held, culminating in a major gathering at London's Cannon Street Hotel on 3 October 1912. That day it was unanimously agreed the Wine & Spirit Brand Association should be formed to help protect and promote the sector.

Sadly, little remains of the Association's early records. It is clear, however, that most of its first decade was dominated by the impact of the First World War. The new trade body had to respond to various pressures, not least a Central Control Board set up to regulate the drinks trade, the diversion of alcohol production into munitions, and loud calls for restrictions on the sale of alcohol.

Whilst prohibition was avoided and the trade emerged from the war with new minimum maturation and alcoholic strength rules in place, it had already become clear that a stronger body focused on whisky alone was needed. As a result, in 1917, the organisation evolved into the Whisky Association, covering both Scottish and Irish producers.

Through the twenties what archives exist reveal a focus on easing state intervention in the trade, reducing high taxes and counter-acting the temperance agenda. However, it is not until 1939 that the

Association's detailed records start, just before a major milestone in its history.

The Second World War re-shaped the Scotch Whisky industry. The issues were fundamental; could whisky even be made at a time of shortage and to what extent could it be exported to support the hard pressed British economy.

Of lesser importance but pivotal to the trade body's history was the 1942 decision to re-constitute as the Scotch Whisky Association, with Irish distillers now omitted from membership. The new SWA would become involved in intricate negotiations with government arguing that it was in the national interest to allow distillers to use scarce cereal supplies. In the end, annual export targets to 'hard currency' markets would be agreed with government until 1953, with unrestricted access to cereals resuming from 1950. As one Minister recognised 'the country needs food, dollars mean food, and whisky means dollars.'

First through necessity, then driven by opportunity, the industry turned its attention to export markets in the fifties and sixties. Supporting that effort by tackling trade barriers would win the Association an international reputation for its market access expertise.

Much of the early attention was on growing exports to recovering European economies and the Americas. However, this would evolve into global campaigning on trade barriers as the sector tackled protectionism and sought to take advantage of new opportunities in Asia.

From the 1970s, there was also hard work done to ensure the Common Market delivered commercial benefits to distillers,

with important cases on unfair taxation in the likes of France and Italy pursued. Work with the European Commission over the last thirty years to remove trade barriers in Greece, Spain and Poland as they negotiated entry into the EEC has paid equal dividends.

In parallel, the Association consistently engaged with trade negotiations. The 1994 'zero for zero' tariff agreement involving Europe, the USA, Japan, and Canada was a major achievement, whilst there was also pioneering work on the use of GATT rules to tackle tax discrimination in Japan, South Korea and Chile. The 1996 WTO panel ruling on Japan was historic, and the culmination of a tenacious 25 year campaign of cajoling, persuasion, and negotiation.

Such law has helped put into practice the principle that imported and domestic spirits should be taxed and treated in a similar way. Much of the last 20 years has been spent making sure those same principles are respected in emerging markets such as India, which is today the Association's top international priority. There has also been a long term effort to help open up new opportunities in China for member companies.

The post-war period also witnessed an Association that became increasingly active in seeking better protection for 'Scotch Whisky' in national laws, international agreements, and through legal action. That work has remained remarkably consistent over time; with the constant goal to protect Scotch from unfair competition.

Those handling the early protection of Scotch often broke entirely new legal ground. Recognising that geographical



descriptions were protectable was a new concept, albeit the concern was old if imitations are widely sold, the description 'Scotch Whisky' becomes generic.

Looking back, it is clear that those setting up the SWA's legal activities were far sighted in recognising that threat. As a result, no court in any country has ever ruled that 'Scotch Whisky' is generic. In total, the SWA Council has authorised legal action against over 1,000 brands and nearly 3,000 trademarks worldwide have been opposed. Today, at any one time, up to 70 different legal actions around the world are being pursued.

For those who enjoy a dram, it is perhaps surprising that there has also been significant debate over the definition of what is in your glass. It took many hours of unglamorous, detailed negotiation in London and Brussels to secure a robust whisky definition in UK and European law, protecting traditional practice and the integrity of the category.

Whilst the first definition of Scotch Whisky in UK law had been agreed by 1933, it took until 1988 to secure a private member's bill at Westminster that could deliver a dedicated Scotch Whisky Act. Agreement was also reached that year on a European Spirits Regulation that recognised the Scotch Whisky geographical indication (GI) and secured an acceptable whisky definition across the European Communities.

Today's work on GI protection in emerging markets continues to put the SWA in the vanguard of breaking new legal ground. Such protection has been secured in markets from China to India, Malaysia to Turkey, Vietnam to Panama.

The Association's recent history saw passionate debate over the definition and labelling of whisky re-surface in 2003.

the law laid down rules on the labelling of Scotch Whisky and the classification of the five categories of Scotch. It took 97 of the Association's 100 years but there are now comprehensive rules in place.

Like its legal protection work, the SWA has been tenacious on the question of excise duty. The case for tax reform has been made to over 30 Chancellors, from Winston

**“THE NAME MIGHT HAVE CHANGED
SINCE 1912 BUT THE NEED FOR
A STRONG TRADE ASSOCIATIONS
REPRESENTING THE SCOTCH WHISKY
INDUSTRY REMAINS THE SAME”**

Whilst challenging for the organisation, such debate demonstrated again the benefit of a strong trade association. Despite strongly held opposing views, members were able to reach agreement on a way forward within and through the Association by setting up a working group with the aim of better defining and protecting Scotch Whisky, with a particular emphasis on Single Malt Scotch Whisky. That might have disappointed headline writers but it also led to landmark new Scotch Whisky Regulations being put on the statute book in 2009. For the first time

Churchill to George Osborne. That case has been admirably consistent. The 1923 Budget submission to Stanley Baldwin, for example, still resonates today, pointing out that higher taxes on Scotch would promote other drinks, set an unwelcome precedent to be copied overseas, and damage the supply chain.

Unfortunately, the industry has too often been seen as a source of unlimited tax revenue and capable of sustaining ever higher duties. That said, HM Treasury has conceded the strength of the industry's case for a fairer duty system where all

alcohol is taxed on the same basis, depending on alcohol content. Echoing previous Chancellors, on cutting the tax for the first time in 100 years, Ken Clarke noted that the 'high rates of duty at home have made it difficult for the Scotch Whisky industry to press their excellent case for lower duty rates in other countries.' The following decade, Gordon Brown committed 'to delivering a fairer balance in the burden of taxation falling on different alcoholic drinks.' Whilst excise duty has only been cut twice over the last century, spirits duty has been frozen in 15 of the last 30 years.

Over time, the Association has become a well-respected advocate for the industry. By the late-1960s, a 'Scotch Whisky Centre' had been opened in London to help outreach to MPs and the media. A presence at party political conferences from 1985 also raised the Association's profile, with the SWA reception becoming a hot ticket and its award winning stands conveying the tax message in often memorable ways.

The Association's goal on regulation remains the same today as it did in 1912; it should be fair, proportionate, and effective. The volume of its regulatory work has, however, grown dramatically. The impact of joining the Common Market, metrication, water issues, customs & excise, and health & safety are all areas where the Association has had to devote years of effort to ensure the right result for the industry.

Operational issues evolve but are rarely new. With such issues only limited by the imagination of the regulator, the benefit of industry collaboration through the Association has been clear.

In the seventies, important export refunds were secured, saving members' half a billion pounds over the scheme's lifetime. Twenty years later, the focus was on preventing a costly scheme that would have required 'hazard warning labels' on every cask. More recently, considerable time and effort was required to ensure that the introduction of tax stamps and climate change legislation is appropriate and not overly burdensome on producers. On the former, the introduction of stamps was mitigated by HMRC's acceptance of alternative industry proposals to the tune of £50m a year, a sum equivalent to annual whisky exports to Canada.

Looking forward, it is clear that the Association's environment agenda will only increase in importance. Development of an industry environment strategy, setting



Bottles being filled during production

collective effort and will continue to shape our work for many years to come. Industry sustainability is also impacted by the Association's involvement in promoting more responsible attitudes to alcohol. The debate on alcohol's place in society is not new. As far back as 1919, records show an organisation concerned about the threat of prohibitionist legislation in Scotland. Today's campaigning for more proportionate and targeted policies than state intervention in pricing shows how the debate continues.

The Association has actively promoted social responsibility for the best part of 40 years. Over that period, academic research on alcohol misuse has been supported and training of GPs and nurses on alcohol issues financed. More recently, a far reaching industry code of practice on responsible marketing was launched, whilst the SWA has been instrumental in setting up a partnership with government aimed at encouraging responsible drinking.

Inevitably, a trade association spends most of its time on supporting the ability of member companies to make, trade, and promote their brands. Fair treatment at home and abroad is the goal. The Association has, however, a long history in promoting Scotch Whisky. These efforts have been diverse and often surprising.

Take, for example, the collaboration on creating a mock medieval castle, complete with portcullis, to promote whisky at the Wembley British Empire Exhibition in the 1920s. Support for the film 'Whisky Galore' and a high profile campaign in Canada that included sponsorship of the 'Scotch Cup', which became the pre-eminent competition in world curling, would follow after the war.

From the 1960s, information and promotional

the diversity of activity that the Association could be found equally at home at the Royal Highland Show and the Venice Film Festival. Some events stand out more than others, such as a whisky tasting for 'models and mannequins' in Copenhagen. An Association film 'Time was the Beginning' would be seen by an international audience of millions as part of a package including James Bond's outing in 'Live and Let Die'.

The increasingly global nature of the industry would later be reflected by generic Scotch Whisky campaigns in the USA and Japan. It was also shown by the SWA's celebration of Scotch Whisky's 500th anniversary in 1994. That year's programme included a memorable launch on the Royal Yacht Britannia in New York harbour, events from Sao Paulo to Tokyo, and a Scotch Whisky Day in Scotland.

Taken together, the history of a trade association sheds light on the industry it represents. The SWA's history reflects the history of the Scotch Whisky industry over the last 100 years. Its past helps us to understand what the future might hold for one of Scotland's most important and iconic industries.

The Association has represented its members in times of growth and decline, recession and renaissance. Whilst much has changed, there is remarkable continuity in the Association's history, with only six chief executives and eighteen chairmen in the past century. The themes they have grappled with are constant; fair treatment on tax, exports, protection, and our operations.

The name might have changed since 1912 but the need for a strong trade association representing the Scotch Whisky industry remains the same.



Line of barrels

Recollections From The Chair

Some of the most significant figures in the history of the SWA share their thoughts

Ian Curle

*Chairman 2012 –
present*

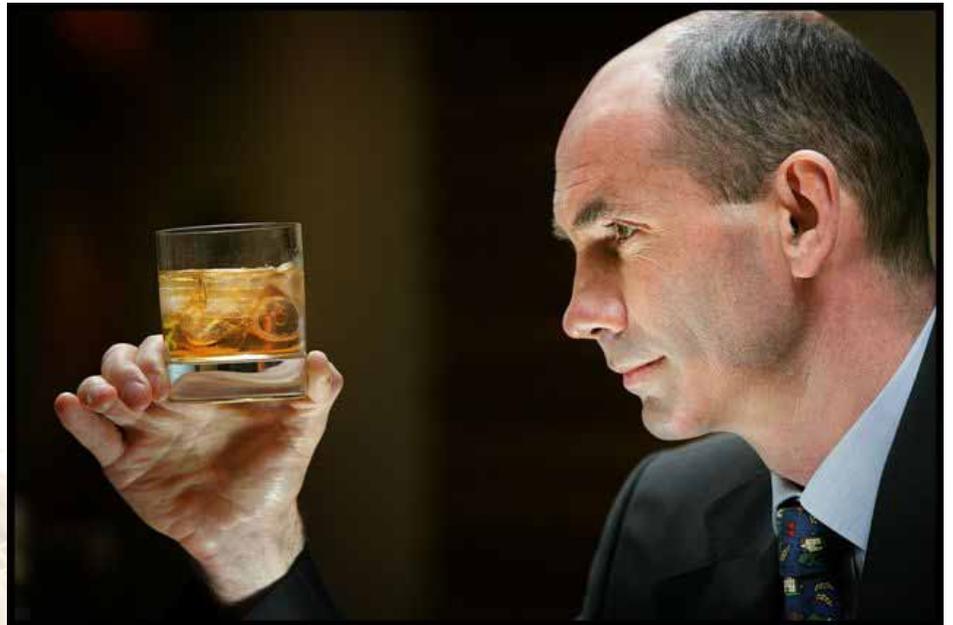
I am truly honoured to be Chairman of the SWA during its centenary year at a time when the industry is enjoying sustained growth and investing for the future. The Association can look back over its first one hundred years with pride and look forward to the next era with great confidence.

The SWA's primary objective is to protect and promote the Scotch Whisky category and during its first one hundred years the Association has guided the industry through world wars, recessions, trade restrictions, tax discrimination and many other regulatory challenges.

The Association's work has been a cornerstone of the international development of the Scotch Whisky industry, preparing the ground for the record growth which the industry has enjoyed in recent years. This growth is driven by numerous emerging economies where the Association has worked on behalf of the industry to eliminate trade barriers and discriminatory taxation.

In the modern era the Association's priorities have expanded beyond its traditional remit to include sustainability and social responsibility, two topics which demonstrate the strength and the flexibility of the Association and its members.

In 2009 the Scotch Whisky industry addressed the issue of sustainability and was the first industry sector to publish an environmental strategy. I am pleased to report that we are making significant progress towards our interim 2020 targets, achieved



through the collaboration of the member companies and the leadership provided by the Association in setting stretching targets for the industry and orchestrating the support of the membership.

The industry also takes its social responsibilities seriously and the members have worked with the Association to develop a marketing code promoting the responsible consumption of whisky. This focus on self-regulation has also led to the Association working in partnership with our domestic governments to make a positive impact on the issues relating to alcohol misuse.

As the Association looks forward to its second century, I would like to thank Gavin and the executive team at the Association, together with the representatives of the member companies who work together collaboratively to ensure our continued success.

“THE ASSOCIATION'S
WORK HAS BEEN
A CORNERSTONE
OF THE
INTERNATIONAL
DEVELOPMENT OF
THE SCOTCH
WHISKY INDUSTRY”

Paul Walsh

Chairman 2008 to 2011



Scotch Whisky. An instantly recognisable and iconic product the world over – a badge of progression and an expression of aspiration wherever it appears.

This hasn't happened by accident – it's a fantastic product of course with a spectrum of flavour. The pioneers of the industry had the foresight and the determination to carve out new markets the world over and to direct new innovations such as continuous stills and the art of blending. It has also been the skills of the marketers who have excited consumers and helped to turn this magical mixture of cereals, yeast and water into the world's truly global spirit.

No better evidence of this is the ownership from overseas where companies have wanted a share of this highly successful industry. Continued investment from companies big and small from home and abroad has helped to secure the future of Scotch in the same way that our predecessors left a legacy for the future.

Scotch Whisky brands are enduring - they have lived and grown through significant upheavals: wars, revolutions and prohibition, recessions and depressions.

Over the last hundred years, the industry has also been served by a trade association which has assiduously promoted and protected our Liquid Gold. The Scotch Whisky Association has a unique reputation amongst governments for its professionalism, levels of engagement and its skill in dealing with a whole range of complex issues.

I was proud to have served as Chairman during what has been described as a renaissance in Scotch - where new markets were opening up, traditional markets started to show growth and we secured stronger legal protection for our special product.

Investment in the future of the industry has been higher than ever before and great advances have been made in environmental initiatives aimed at making that future sustainable.

At all times the activities of the Association have been about doing what is good for Scotch and good for the UK, as the country's number one food and drink export goes from strength to strength.

“THE SCOTCH
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AND ITS SKILL IN
DEALING WITH A
WHOLE RANGE OF
COMPLEX ISSUES”

Richard Burrows

Chairman 2006 to 2007

As the Association marks its centenary, which is but a fraction of the time that this industry has been of vital importance to Scotland, it can reasonably claim much credit for the strength and vitality of Scotch Whisky today.

Its mission, to promote, to protect and to represent, and its singular focus on its brief, gives it clarity and cohesion which makes it the pre-eminent trade association of my experience.

That cohesion of purpose amongst the members of the Association results today in an industry accounting for one quarter, by value, of food and drink exports from the United Kingdom. And growing; growing in a global market where the spectrum of consumer preference is ever more diverse.

The Association, with its enduring staff led so ably by Gavin Hewitt, brings together commercial enterprises of very different hues, loyal to both the letter and the law of the definition of Scotch Whisky.

As Liz Lochhead, the Makar of Scotland, puts it in her poem for the Centenary, "Liquors, elixirs, infused with ... is that a hint of anise, even liquorice?" What a cocktail of taste Scotch Whisky is, yet built from a single definition. And like the product, so many different member companies contributing to the membership of Council, yet, while continuously evolving, remaining as constant as any leading blend.

The constancy of the Association is matched by the sustainability of the industry. An industry rooted in the highlands, lowlands and islands of Scotland, caring about its sustainability in its natural environment. An industry, I would suggest, unconcerned about Scotland's status within or outwith the United Kingdom.

It has created its own identity worldwide, and its Association is resourced and well led to protect its heritage and its future.

I wish the Association and its members well for the next hundred years.



“THE CONSTANCY OF THE
ASSOCIATION IS MATCHED BY THE
SUSTAINABILITY OF THE INDUSTRY”

Sir Ian Good

Chairman 2001 to 2005

The chairmanship of the SWA was a great honour that came my way at the start of the new millennium. It brought with it a tremendous responsibility to represent not just Edrington but the whole Scotch Whisky industry. Whilst there have been eighteen chairmen of the Association, there have been just six chief executives (or secretary or director general as they have been called in earlier times), a statistic that represents the continuity that underpins the SWA. In my five years in the chair I was able to draw on the vast experience of the executive team, whose counsel allowed us to make progress on a number of fronts.

I remember that era as one in which the Association made significant steps to narrow the UK duty differential between spirits and beer & wine, achieving a number of standstill budgets whilst other categories rose closer to Scotch Whisky. The pursuit of a fair duty regime remains a challenge to this day and the SWA's vigorous lobbying on this issue is undiminished.

To the outside observer the Association is one of the most cohesive trade associations in the world. However, it wasn't always the case. In my time as chairman we faced a unique challenge around the definition of malt whisky. The industry had good intentions as it sought to meet the demands of this fast growing segment of the market. There were contrasting views around the table on how much flexibility should

be allowed in the term "single malt whisky". That came to a head in 2003 and created unwelcome PR as the Association became the story and BBC Scotland cameras were trained on the steps of Atholl Crescent.

How did we resolve such an impasse? The way that the Association usually does, through the reconciling of strong views, the foresight to protect long term interests and the ability to translate this into action. In this case the result was a new set of legal definitions for Scotch Whisky that eliminated any possible ambiguity, a great triumph for the current SWA team led by Gavin Hewitt.

It's not just in the field of protection that the SWA does its best work. Future success for Scotch depended on freedom to market in some countries that looked fanciful in 2000 but are currently significant growth markets. Now we can speak confidently about performance in Brazil, Russia, and China. Hypothetical lists of emerging markets have become profit deliverers as the Association has worked in tandem with its members to clear barriers to competition in some of the most exciting markets in the world.



“HOW DID WE RESOLVE SUCH AN IMPASSE? THE WAY THAT THE ASSOCIATION USUALLY DOES, THROUGH THE RECONCILING OF STRONG VIEWS, THE FORESIGHT TO PROTECT LONG TERM INTERESTS AND THE ABILITY TO TRANSLATE THIS INTO ACTION”

Hugh Morison

Director General 1994-2003

The decade 1994 – 2003 saw the 500th Anniversary of the first record of Scotch Whisky, celebrated throughout the world, the first cuts in UK duty for a century, significant progress in opening up overseas markets, continued debate with the British Government and the European Commission on production and the environment, and closer cooperation with colleagues in other sectors of the drinks industry to achieve common goals.

It was not all easy. On my first day with the Association I received a call from the Director of the Brewers Association. We had previously crossed swords over the future of the Scottish steel industry when we were both Under Secretaries in different government departments. 'How nice to hear from you.' I said, 'let's discuss how we can make things difficult for our former masters.' 'Forget that,' he snarled, 'I'm phoning to complain that your Budget Submission proposes an increase in the tax on beer.' Of course it didn't – it argued for parity, and on this we made significant progress over the period.

Subsequently we did make common cause, not only with the Brewers, but also with the Gin and Vodka Association and with our fellow Europeans in the Confederation Européenne des producteurs de spiritueux, or CEPS as we call it in English.

They say that imitation is the sincerest form of flattery. But it is not welcome when it damages your members' bottom line. So we devoted considerable effort, and expenditure, to removing counterfeit products from the market. We had many successes, of which my favourite was a French product whose label sported tartan, thistle, a St Andrew's flag

above a dark loch in which there was just the hint of a monster. The back label specified that it contained 2% Malt Whisky and 98% alcohol d'origine agricole. The brand was named 'Loch Nest'.

It was a constant preoccupation to ensure that government regulation did not damage our competitiveness. A minor but satisfying triumph in this area was to persuade the British government that peat should not be subject to the Climate Change Levy – a tax on energy use.

Trade associations are only as good as the people they employ. During the period the Association benefited from the skills and energy of all its staff under the leadership of Tim Jackson in International, Tony Tucker and Campbell Evans in Public Affairs, Quintin Stewart and Glen Barclay in Legal, and John Hedley and Ian Shearer in Operations. Due in no small part to all their efforts the Scotch Whisky industry continues to prosper today.



“TRADE ASSOCIATIONS ARE ONLY AS GOOD AS THE PEOPLE THEY EMPLOY”

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WORLD'S
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WHISKY
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Loch Fyne Whiskies

No one can deny the inclusion of specialist retailers as an essential part of the Scotch Whisky Industry, providing the vital link between industry thinking and the consumers who are actually going to empty the bottle!

Loch Fyne Whiskies created an original style of whisky shop that is now imitated worldwide, pioneering a fun atmosphere and quality presentation only found throughout specialist retailers. From a single small outlet in a picture-perfect village on the west coast of the Scottish Highlands, this centre of excellence has, over 20 years, established an unrivalled reputation for customer care and encyclopaedic information. Such dedication perfectly reflects the premium products of the Scotch Whisky Industry.

Beyond the shop, LFW.co.uk has spread whisky understanding and sales worldwide from an innovative, thought-provoking website, making whisky selection easy and rewarding.

A very warm welcome from an enthusiastic and well informed team of whisky advisors turns incoming smiles into whisky grins!

EMBRACE THE SPIRIT OF THE HIGHLANDS



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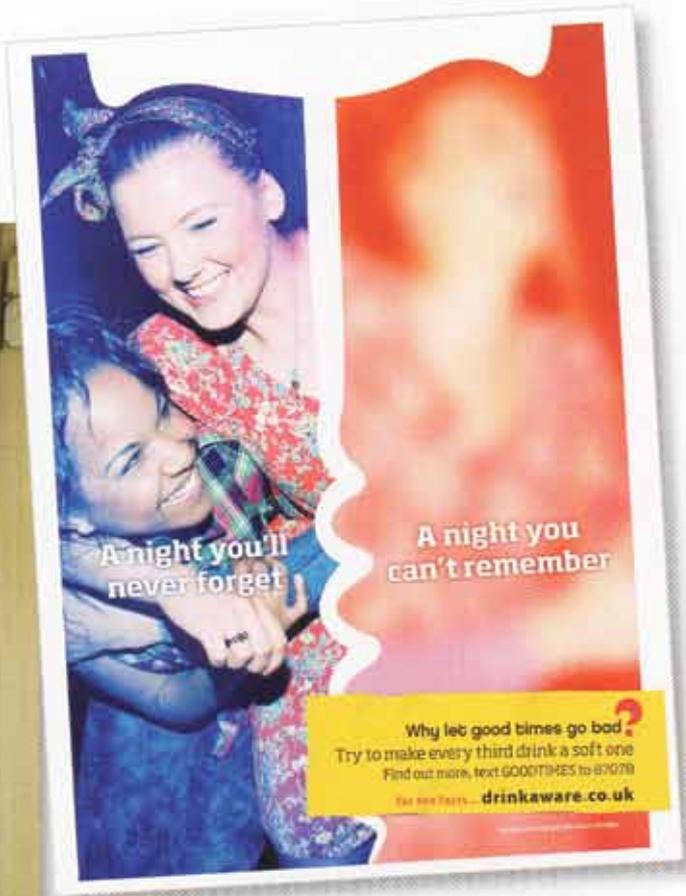
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The Association's current work

By Gavin Hewitt, Director of Government and Consumer Affairs, SWA

As the Scotch Whisky Association celebrates its centenary, it is appropriate to look at some of the topical issues it is addressing on behalf of its members. The following pages flesh out some of those issues, as seen through the eyes of those in the front line.

Protecting Scotch Whisky

Legal protection of Scotch Whisky remains the top priority of the Association. We spend a lot of money taking fakes off the market. Five intellectual property lawyers on the Association staff led by Glen Barclay instruct legal firms around the world either to persuade the local authorities themselves to take action against the fraudsters or mount criminal or civil actions against them. The Association has had some phenomenal successes. Imitation may be flattering, but in the case of Scotch it is damaging. The consumer, whether a novice or an enthusiast, deserves to get the drink he orders. Lindsay Low, one of our in-house IP lawyers gives an account of one of his recent visits to China and Taiwan.

Opening up markets

Exports of Scotch Whisky have grown in value by around 100% in the last ten years. Much of the credit goes to the imaginative marketing of Scotch to a younger, aspirational and more affluent global consumer. The middle classes have exploded in China, South East Asia, India and Latin America over the last decade. The Scotch Whisky industry has built much of its export success on the aspirations of consumers in new markets while meeting the more sophisticated demands of consumers in mature markets such as the United States and France, who have never had a wider choice of brands and expressions.

But our export success over the last ten years owes much to the Association's assiduous work over 25 years in challenging

protectionist measures in third markets such as tax or tariff discrimination and technical barriers to trade. Signal trade rulings in Geneva against Japan, Korea and Chile in the 1990s set the precedent for further successful trade challenges against countries this century as diverse as Uruguay and the Philippines. At the last count, Scotch Whisky still faces over 600 technical barriers to open trade around the world. So there is no shortage of challenges ahead for the Association. Meanwhile the Association works closely with the UK Government and the European Commission to open up markets through multilateral trade rounds and through the negotiation of Free Trade Agreements between the European Union and its major trading partners. The biggest prize of all would be the successful conclusion of a Free Trade Agreement with India and the reduction of the high tariff level there.

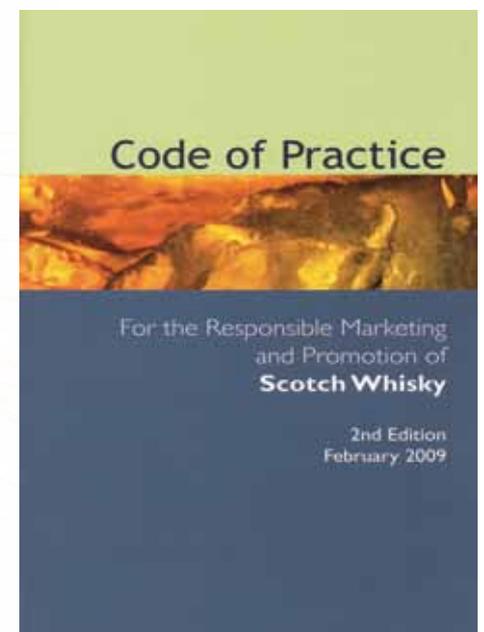
That trade work is reflected in our export record in 2011, which has been carried through into our centenary year. Peter Wilkinson, Director of International Affairs sets out our export performance.

Greening the industry

The industry has always had a "green tinge" to its production. Many brands of Scotch are justifiably marketed on the back of the pristine nature of the Scottish landscape or the purity of Scotland's water. The industry has much to be proud of, but it was not able to tell a consistent story about its environmental record. That was put right in 2009 when the Association launched its environmental strategy with

stretching targets through to 2050 covering the reduction in the use of fossil fuels with lower greenhouse gas emissions for the industry's energy needs through to the recycling of packaging materials and use of sustainable oak casks.

The industry has not been afraid of accounting to stakeholders for its environmental record. The last stakeholder report was published in the autumn of 2012. You can read about it in a short account by Julie Hesketh-Laird, Director of Operational and Technical Affairs, of what the Association and the industry together have done since the environmental strategy was launched in 2009.





Drinking responsibly

Tackling alcohol harm is not a new phenomenon. The Scotch Whisky Association has been working on addressing alcohol-related harm from its inception. The pace may have quickened over the last few years as health professionals have focussed their attention on the drinks industry, but we remain well ahead of our critics.

The Association remains the only UK drinks trade body with a mandatory code on the marketing and promotion of its products; you can find a copy on our website www.scotch-whisky.org.uk. Member companies can be fined or expelled from SWA membership for flagrant breaches. None has yet felt that sanction. But we have not been passive. The SWA was one of the founding members of the Scottish Government Alcohol Industry Partnership, which has forged policies for alcohol sponsorship and guidelines for alcohol in the work place, as well as mounting some of the most successful alcohol awareness weeks ever held, in terms of its continuing impact.

Our member companies are very active in promoting responsible drinking. Some of the work is set out in *Matured to be Enjoyed Responsibly* which is regularly updated. You can visit our website at www.scotch-whisky.org.uk

Changing cultural attitudes to excessive drinking and education, not government control of the price of alcoholic drinks, is the key to reducing alcohol-related harm. Our challenge to the Scottish Government's proposal for minimum unit pricing is well-based; it is illegal under EU trade law, will

not reduce the number of harmful and hazardous drinkers and will put at risk our export success.

Helping the consumer

Scotch Whisky is matured to be sipped, not quaffed. Have you ever asked about how Scotch Whisky is made and what are the regulations which govern its production? You can find all the answers in one of the Association's many publications. *Questions and Answers* is published in a number of languages from Spanish to Mandarin. Take a look at our website www.scotch-whisky.org.uk if you are curious.

Managing the European connection

Nick Soper heads the SWA's European Affairs Department. Most regulation affecting the industry comes out of Brussels, including Regulation EC 110/2008 on Spirit Drinks, which is the backbone of the definitive Scotch Whisky Regulations 2009 regulating the definition and presentation of Scotch Whisky. A wide range of other issues, often complex, have to be negotiated in Brussels, partly through our European umbrella body *spiritsEUROPE*, but often directly in detailed consultations with the Commission, the European Council and the European Parliament. Many of them affect consumers directly, for example, the size of a whisky bottle and the labelling it carries.

The European Affairs Department also monitors closely the accession negotiations

of new member states. Through this means, the Association has been able over the years to ensure that a new member state on entry to the European Union is fully compliant with EU law as it relates to spirit drinks.

Employing a skilled workforce

An industry is only as good as the people it employs. The Scotch Whisky industry has an extraordinarily dedicated and skilled workforce, many of whom spend their entire working lives in the industry, whether in the bottling halls or in the 107 distilleries spread across Scotland. Go and read about them in *Scotch Whisky, the jobs...the people*. Many of them are highlighted in the centenary exhibition at the Scottish Parliament. The industry is immensely proud of its workforce.

Understanding our past

The Association is only a hundred years old, but the history of Scotch Whisky goes back over 500 hundred years. Some of that history is recalled in a number of articles which appeared in the 500th anniversary souvenir publication of 1994, republished here. We make no apology for that. The style of the articles may be different, but they highlight some of the traditions and history of the industry which continue to make Scotch Whisky the best known and best loved globally traded spirit drink.



Scotch Whisky's Green Credentials

Great Strides Being Made in Meeting Environmental Targets

By Julie Hesketh-Laird, Director of Operational and Technical Affairs, SWA

The Scotch Whisky industry is on course to meet its ambitious environmental targets, from use of non-fossil fuel to waste management.

The Scotch Whisky Industry Environmental Strategy Report 2012 provides a comprehensive update on progress towards reaching the strategy targets set for 2020 and 2050. Launched in 2009, it is the most comprehensive environmental strategy of any comparable industry and has been widely applauded throughout Scotland.

The report reveals that energy sourced from non-fossil fuel has doubled to 6% since the last report published in 2010. This supports a low carbon economy.

A series of large investments by Scotch Whisky distilleries has assisted the move to renewable energy. Since 2008, more than £160 million has been invested in renewable energy schemes at five industry sites, including large-scale anaerobic digestion, biomass and renewable combined heat and power. Scotch Whisky companies are the biggest investors in renewable energy in Scotland outside the utilities sector.

One example of a renewables project is the £60.5 million biomass/feeds combined heat and power plant under construction in Rothes, Speyside. It will use Scotch Whisky distillery by-products to generate enough

electricity to power all the houses in Elgin, produce animal feed and drastically cut carbon emissions. Helius CoRDe Ltd - a consortium including the Scotch Whisky producers - is behind the scheme.

As well as investing in the use of by-products to create energy, the Scotch Whisky industry remains committed to the supply of high-quality animal feed.

Impressive progress has also been made on reaching the commitment of sending no packaging waste to landfill by 2020, with a cut from 17% to 7% as a result of changes already made to the handling of waste at bottling halls.

The Scotch Whisky industry has always

had strong green credentials. Progress in reaching our stretching environmental targets is evidence of the industry's ongoing commitment which is supported by the considerable capital investment in sustainability projects. These are still early days of a 40-year plus programme and the industry is making good steps towards its goals.

We're delighted at the level of innovation shown by the industry, from pioneering light-weight bottles to vast renewables schemes, by Scotch Whisky producers of all sizes. We realise more work remains to be done, but we're confident we can achieve our aims. A number of major capital investments have been announced recently and the industry is working closely with the supply chain to offer share efficiencies. However, we also need support from government in a number of areas, including planning, incentives to switch to renewables and a simplification of the energy policy framework. The environmental strategy

has won many plaudits, including from the Scottish Government and the Scottish Environmental Protection Agency (SEPA). "The Scotch Whisky industry has been quick to recognise the importance of an industry

"SEPA is delighted to acknowledge the continuing progress made by the Scotch Whisky industry in pursuing their Environmental Strategy. This is an excellent example of an industry going beyond strict compliance with

“THE SCOTCH WHISKY INDUSTRY HAS BEEN QUICK TO RECOGNISE THE IMPORTANCE OF AN INDUSTRY THAT CAN DELIVER SUSTAINABLE ECONOMIC GROWTH”

that can deliver sustainable economic growth. It is showing true leadership to other industry sectors by being the first to align itself with the Scottish Government's climate change targets" Richard Lochhead MSP, Cabinet Secretary for Rural Affairs and the Environment.

Scottish regulations and setting challenging targets for itself; thereby demonstrating real leadership in reducing their environmental footprint because they have a strong conviction that it is the right thing to do" Andy Rosie, Head of Operations - North, Scottish Environmental Protection Agency (SEPA).

scotchwhisky.net

The Definitive Online Guide to Scotch Whisky

The objective of scotchwhisky.net is to provide the most comprehensive, accurate and "up to date" information regarding Scotch Whisky and the Scotch Whisky industry.

Scotchwhisky.net has been a valuable source of information for all things Scotch Whisky related since 1999. Information is constantly added regarding Scotch Whisky distilleries, Scotch Whisky industry suppliers, independent bottlers, Scotch Whisky retailers - and much more!

The site is widely accessed by Single Malt enthusiasts, those who work in the industry and those who are simply browsing for information regarding the best scotch whisky, whisky distilleries, whisky retailers, whisky bars, whisky related gifts or the latest whisky news. The 1000+ pages are packed with valuable information for whisky novices and connoisseurs alike.

Scotchwhisky.net also exclusively offers the eBook "The Essential Guide to Scotch Whisky" and provides exclusive online sales of the "The Scotch Whisky Industry Review" - established in 1976 and published annually, it is the single most authoritative source of business information available regarding the Scotch Whisky industry.



scotchwhisky.net

The Definitive Online Guide to Scotch Whisky

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- Single Grain Scotch - Blended Whiskies - Whisky Retailers
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- Whisky Advisory Service
- Whisky Gift Shop
- Competitions

www.scotchwhisky.net

A Legal perspective from China and Taiwan

By Lindesay Low, Legal Adviser, SWA



One of the great fascinations of my job is the chance to travel overseas to promote legal protection and to appreciate the truly international nature of the Scotch Whisky industry. Shrugging off missed flights, lost bags and near 100% humidity, I recently completed an extremely informative visit to China and Taiwan.

As the Scotch Whisky Association's Legal Adviser responsible for these markets, I was in Shanghai for a roundtable discussion with our Chinese legal contacts, working with member companies to review our campaign against fake "Scotch". With Scotch Whisky protected as both a collective trademark and Geographical Indication (GI) in China, the industry has had a considerable success taking action against the counterfeiters. The GI recognises that Scotch Whisky can only be made in Scotland. Although the number of fakes seems to have declined, we're not assuming that trend will continue and we're always looking at new ways to identify and

stamp out these rogue products.

It was then on to Beijing where, along with representatives from the British Embassy, we met with the director in charge of the Chinese agency responsible for enforcement of our GI.

Taiwanese authorities to identify misleadingly labelled "Scotch Whisky" and "whisky". Despite having a population of only 23 million, Taiwan is the third largest consumer of Single Malt Whisky in the world and legal protection of our product there is a top priority.

**“THE GI RECOGNISES THAT
SCOTCH WHISKY CAN ONLY BE
MADE IN SCOTLAND”**

The Embassy now has a dedicated intellectual property officer, Tom Duke, who has been a great support to us. The meeting went well and we have agreed to arrange a training session to help Chinese enforcement officers recognise fake "Scotch Whisky" more easily. The main business in Taiwan was a series of meetings to improve the ability of the

As well as covering a number of legal issues during the trip, I still found time to fulfil a long-held ambition during my stopover in Hong Kong to climb to the top of The Peak. While taking in the breath-taking views, I struck up a conversation with a passer-by walking his dog who regaled me with the virtues of Scotch and green tea. Scotch Whisky truly is an international product.

VAT 69

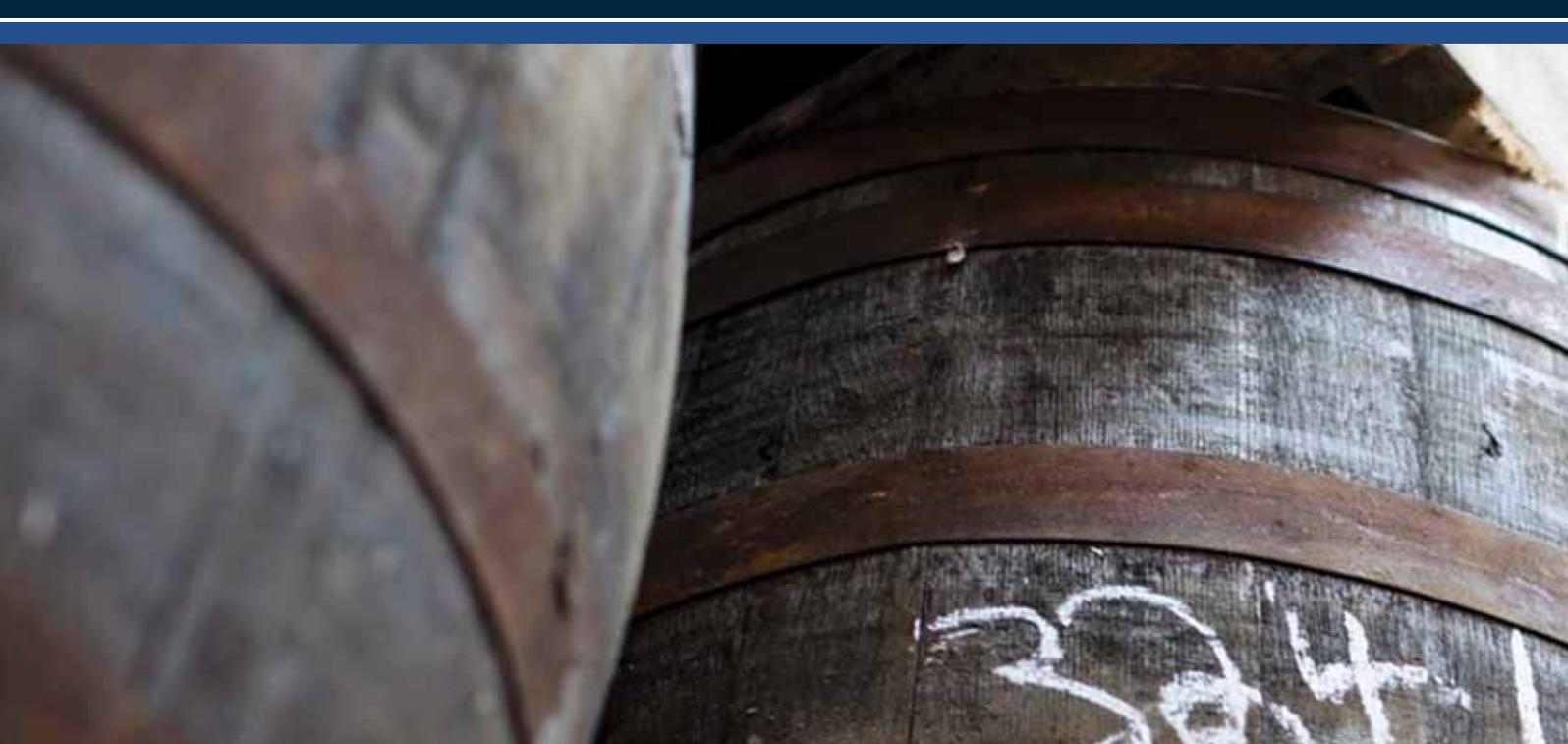
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Exports Remain at Record Levels

By Peter Wilkinson, Director of International Affairs, SWA

The demand of Scotch Whisky across the world continues to rise to new heights. 2011 was a record year. We have continued our performance in the first six months of 2012. Growth was seen in the USA, Venezuela, Germany and in exports to Russia through the Baltic states. Asia remained steady with good growth in Taiwan. This helped Scotch Whisky exports to maintain their value in the first half of 2012 at £1.8 billion, despite continuing pressure in some Eurozone countries and the after-effect of an increase of shipments to France last year ahead of a substantial tax rise.

In the first half of 2012, exports to the USA jumped by 13% to £303 million and it remains the biggest market value for Scotch Whisky.

Venezuela, the ninth biggest market for Scotch, recorded significant growth - leaping 31% to £42m. In Europe, Germany saw exports increase 4% to £65m in the first six months of the year. Latvia and Estonia now appear in the top 20 markets, mirroring a surge in demand in Russia as well.

India saw an increase of 28% to £28m and the SWA remains hopeful that a conclusion can be reached on the European Union/India Free Trade Agreement (FTA) soon. The FTA

would see a gradual reduction of the onerous 150% tariff on imported spirits. Reduction in that tariff would allow India to fulfil its potential to be one of the biggest markets for Scotch.

Scotch Whisky continues to attract younger, affluent consumers in newly emerging markets and this trend is expected to continue.

months. While there has been a levelling off in the first half of this year, the industry remains confident about the future”.

“Recent announcements of investments in new distilleries and the expansion of existing facilities demonstrate the level of confidence producers have in future growth opportunities”.

**“SCOTCH WHISKY CONTINUES TO
ATTRACT YOUNGER, AFFLUENT
CONSUMERS IN NEWLY EMERGING
MARKETS AND THIS TREND
IS EXPECTED TO CONTINUE”**

Commenting on the figures, Gavin Hewitt, Chief Executive of the Scotch Whisky Association said:

“Over the past year the value of Scotch Whisky exports has continued to increase and we’re delighted to build on our outstanding success in 2011 with 12% growth in the last 12

months. While there has been a levelling off in the first half of this year, the industry remains confident about the future”.

A table of the top 20 export markets illustrates the changing marketplace and the strengths of many new markets.



Top 20 Scotch Whisky Export Markets

6 months to end of June 2012



Market	Value
USA	£303.6M
FRANCE	£188M
SINGAPORE	£146.2M
TAIWAN	£80M
SPAIN	£74M
SOUTH KOREA	£65.7M
GERMANY	£66M
SOUTH AFRICA	£54.8M
VENEZUELA	£42M
UAE	£39.5M
BRAZIL	£35M
MEXICO	£32M
LATVIA	£32M
JAPAN	£31.6M
CHINA	£31M
AUSTRALIA	£28.6M
INDIA	£28.3M
CANADA	£26.3M
ESTONIA	£24.8M
ARUBA	£22.7M

OUR SKILLED WORKFORCE

The SWA Centenary Exhibition at The Scottish Parliament highlights some of the people and important jobs within the industry

1. STARTING



“THE CHALLENGE IS TO ENSURE THE PRODUCT I HELP CREATE MAINTAINS THE STANDARDS SET BY GENERATIONS BEFORE ME”

ARTHUR HOLYOAKE,
MALTINGS OPERATOR
LAPHROAIG DISTILLERY, BEAM

2. PRODUCING

“I HAVE ALWAYS HAD A PASSION FOR SCOTCH WHISKY AND MAKING IT IS THE BEST PART OF MY JOB. I’M PROUD TO WORK IN AN INDUSTRY WITH SO MUCH HISTORY AND HERITAGE”

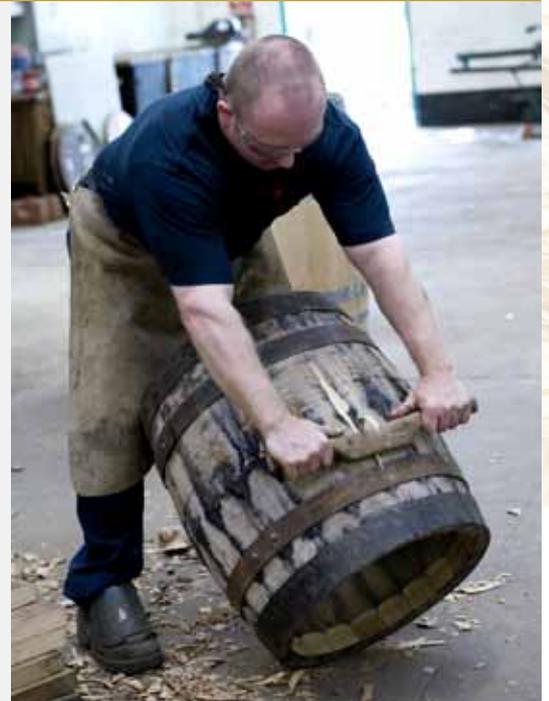
KIRSTY DAGNAN, SENIOR SITE MANAGER
GLEN ORD, DIAGEO PLC



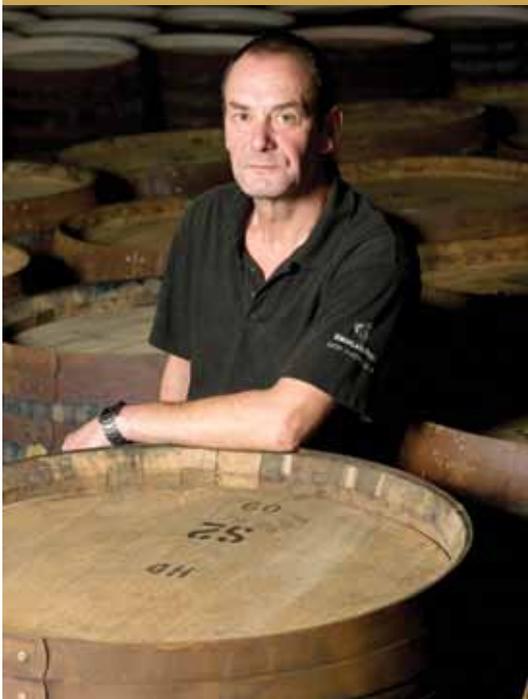
3. COOPERING

“NO MACHINE CAN EVER
REPLACE THE SKILLS WE HAVE
THAT ARE REQUIRED TO MAKE
A PERFECT CASK”

JOHN CARBERRY, COOPER
CAMBUS COOPERAGE, DIAGEO PLC



4. MATURING



“THE BEST PART OF MY JOB IS
PRODUCING A HIGH QUALITY
PRODUCT AND TO KNOW THAT
I HAVE BEEN A PART OF THAT
EVEN IF IT CAN TAKE MORE
THAN 10 YEARS TO CREATE.”

DOD MCCONNACHIE,
PRODUCTION OPERATOR
HIGHLAND PARK, EDRINGTON

5. BOTTLING

“I ASSOCIATE
SCOTCH WHISKY
WITH PRIDE. I HAVE
BEEN FORTUNATE
TO WORK IN THE
INDUSTRY FOR
MOST OF MY LIFE.”

SUSAN GREER, GENERAL OPERATOR
NORTH BOTTLING HALL, PAISLEY, CHIVAS
BROTHERS LTD



6. ENJOYING



“WHAT IS GREAT ABOUT MY JOB IS
BRINGING THE WHOLE SENSORY
ADVENTURE OF MALT WHISKY
AND THE WONDERS OF OUR
INCREDIBLY COMPLEX SPIRIT TO
LIFE, AND THEN BRINGING
THAT TO THE WORLD”

RACHEL BARRIE, MASTER BLENDER
GLASGOW, MORRISON BOWMORE

7. MARKETING



“MY ROLE INVOLVES A NUMBER OF EXCITING ELEMENTS FROM BEING ACTIVELY INVOLVED IN CREATIVE BRIEFING SESSIONS, TO UNDERSTANDING CONSUMER MOTIVATIONS THROUGH GLOBAL RESEARCH PROJECTS”

ALISON WINSHIP,
INTERNATIONAL NEW BRAND
DEVELOPMENT MANAGER
BURN STEWART DISTILLERS PLC

8. EXPORTING

“WE EXPORT ALL OVER THE WORLD, EACH COUNTRY HAS DIFFERENT REQUIREMENTS”

JANE TIMMINS,
EXPORT CLERKESSE
GLENFARCLAS DISTILLERY, J&G GRANT





Scotch Whisky: From Grain to Glass

-MAJOR EXHIBITION LAUNCHES IN EDINBURGH-

The rich heritage of Scotch Whisky, Scotland's national drink, is explored in a major exhibition opening at The Scottish Parliament from 29 November. Visitors will have the chance to see an array of images and artefacts collected from Scotch Whisky producers and enthusiasts, many on public display for the first time.

The Scotch Whisky: From Grain to Glass exhibition in the Main Hall of The Scottish Parliament in Edinburgh marks the Centenary of the Scotch Whisky Association (SWA), the industry trade body.

Every aspect of the Scotch Whisky industry unfolds through words and images. The exhibition, which is free to visit, takes people on a journey through the distilling, coopering, maturing, bottling, labelling, enjoying, marketing and exporting of Scotch Whisky.

It explains how the "What is Whisky?" debate of the early 20th century helped establish the modern day Scotch Whisky industry. Illustrated through a series of rare postcards, visitors will learn how the 1909 Royal Commission on Whiskey and other Potable Spirits decided that only grain and malt whisky produced in Scotland, or a blend

of both, could be called Scotch Whisky. This beat off the threat of distillers in Ireland who refused to blend grain and malt whiskies.

Artefacts and images on display include a mini pot still, mash tun and spirit safe, a reproduction of the Illicit Highland Whisky Still painting by Sir Edwin Landseer, 19th century maps of railways which served distilleries, cooper's tools, classic advertising and promotional campaigns, old films, bottles from different decades, recipes for Blended Scotch Whisky from 1912 and much more.

A striking artefact standing proudly in the marketing area of the exhibition is a full size fibre glass white horse. It illustrates the White Horse brand of Scotch Whisky which is popular in many global markets. The brand has a long history, stretching back to the late 19th century, and is named after the White Horse Cellar Inn which still stands in Edinburgh's Canongate.

Also featured in the exhibition are the people who make Scotch Whisky. Visitors can hear maltsters, coopers, master blenders, marketing professionals and many other employees talking about their skills and passions in recordings made especially for the exhibition.

Gavin Hewitt, chief executive of the Scotch Whisky Association, said:

"Everyone, from Scotch Whisky aficionados to novices will learn something new from the Scotch Whisky: From Grain to Glass exhibition. Scotch Whisky's rich past is showcased, highlighting its position as an iconic Scottish product and demonstrating how vital Scotch Whisky is to the country's economy and society throughout history and now."

"Last year, Scotch Whisky exports reached a record £4.23 billion and the industry directly employs more than 10,000 across Scotland."

"For the last 100 years, the SWA have been committed to promoting and protecting Scotch Whisky. We plan to do so for the next 100 years and beyond."

Scottish Parliament Deputy Presiding Officer, John Scott MSP, said:

"We welcome this major exhibition to The Scottish Parliament which celebrates the rich heritage of one of Scotland's most famous industries. From the science of distillation to the traditional art of cooperage and the whisky-inspired film screenings and poetry of Liz Lochhead, we look forward to hosting an informative, lively and entertaining exhibition here at Holyrood."



Siobhan Paterson, SWA holds a bottle of Glogag's Perth Whisky 1929, Glen Grant during the launch of the Scottish Whisky Association exhibition - from Grain to Glass.



(L-R) Gavin Hewitt, chief executive of the Scotch Whisky Association, Siobhan Paterson, Lauren McArthur and Rosemary Gallagher, SWA and Fiona Andreas, Scottish Parliament art curator speaking at the launch of the Scottish Whisky Association exhibition - from Grain to Glass. The exhibition in the Scottish Parliament's Main Hall explores the history of the Scotch Whisky industry. 28 November 2012. Pic - Andrew Cowan/Scottish Parliament



Rosemary Gallagher, Scottish Whisky Association Communications Manager, views samples of whisky of varying ages during the launch of the Scottish Whisky Association exhibition - from Grain to Glass.



One of many displays at the exhibition



Why Bottles?

Bottled whisky, properly stoppered and sealed, was very attractive to the industry as it was less liable to adulteration or dilution by unscrupulous publicans and spirit merchants than whisky sold in bulk.



Distillery floor



CIB

"Whisky only
be sold in
bottles when
became

Production

Until 1821, glass bottles were made by hand, which meant that capacities and shapes were not standardised.

In 1821, Henry Ricketts, a glass manufacturer in Bristol, developed a method of blowing bottles into three-piece moulds, which made it possible to standardise capacities and shapes. Such moulds left seam marks, but during the 1830s a process was developed to remove these by lining the mould with beeswax and sawdust, and turning the bottle as it cooled.

Innovation

Recent innovations have led to lighter weight bottles being used. Substantial reduction in weight has been achieved which has environmental benefits.

Modern bottling lines can fill hundreds of bottles a minute, but some specialist bottlings are still completed by hand.

Today the high output of suppliers to the Scotch Whisky industry can produce up to 36 million bottles per year.



Corks and caps

Until 1811, bottles were sealed with a cork and wax.

The replaceable cork was invented by James Watson of Adam Teacher & Co. in 1811, which allowed for the well-known 'cork and wax' seal.

The screw cap was introduced by James Watson, which doubled the sales of the Scotch Whisky industry by White & Carter in 1842, as a means of sealing.



"In 1817 Josiah
Howard Ashby
invented the first
cork and wax seal."





BOTTLING 5

In the bottle.

Domestic, why
be so hard to drink.

Deeply steep

The history of the Scotch whisky industry is a story of
of the way in which the industry has evolved over time. The
of 1850 and 1860.

It is a story of the way in which the industry has evolved over time. The
of 1850 and 1860.

Display of many famous bottled brands of Scotch whisky



*Gavin Hewitt, chief executive of the Scotch Whisky Association
viewing amples of aged Scotch whisky*



Rosemary Gallagher, Scottish Whisky Association Communications manager holds a bottle of Glog's Perth Whisky 1929, Glen Grant during the launch of the Scottish Whisky Association exhibition - from Grain to Glass.









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Over 500 Years of Scotch Whisky - Part 1

“THE DEIL CAM FIDDLIN’ THROU THE TOUN, AND DANC’D AWA WI THE EXCISEMAN - ROBERT BURNS

By Robert McCall

Ask any class of history students which truly momentous event occurred in the final decade of the 15th century and it is as good as certain that some four out of five will answer that it was Columbus’ accidental discovery of America in 1492. The other one out of five (the one with the real potential) will choose to see beyond the predictable. He or she will be aware of a far more cheering event which took place some two years after Columbus bumped into an island which he hadn’t known was there. For it was in 1494 that the first ever record was made of the distillation of Scotch whisky.

It wasn’t much in itself. Just a brief entry in an official log accounting for “eight bolls of malt.... wherewith to make Aqua Vitae”. But it was to influence the destiny and character of an entire nation; and change for ever the world’s understanding of words such as warmth, smoothness and satisfaction.

A little over the top? Possibly - but then we Scots are hardly known for our modesty; and in the quality, fame and unquestionable success of our national drink, we have little to be modest about.

Lest any doubt should exist, although that first entry quotes the Latin term Aqua Vitae, it is certain that distillation would already be a firmly established practice and that in common speech its end product would already be exalting in the name “whisky”. It is impossible to be exact, of course, about the time scale through which the Gaelic name for water of life - uisge baugh or uisge beatha, must have passed to become “whisky”. In Ireland the most common belief is that the invading Norman-English were the first to corrupt the name. Whatever the case, it is from that date in 1494 that the history of Scotch whisky can be properly charted. And by any standards, it has had an intriguing and never less than eventful life.

Given what was to follow, it may at first appear

surprising that whisky is not mentioned again in legislative terms until 1579; at which time the Scots parliament decreed that distilling was a privilege to be reserved only for “Lords and Gentlemen”, and then only for their own personal useage. It seems likely, though, that the growth of distilling had been comparatively low profile during the intervening eighty years or so. Spreading from the island communities off the west coast of Scotland, to the north and north-east it will have found a ready welcome amongst a very similar clan and croft based society. There, the warming afterglow of the spirit will have seemed the ideal comfort against the rigours of the highland environment; its rugged character and distinctive flavour matching the fiery nature of the highlanders themselves. In that vein, it was inevitably going to establish itself as a drink distilled far more for personal and hospitality use than for sale. Thus, the small scale highland distiller could quietly enjoy the fruits of his labour without doing anything to provoke unwelcome legislation.

It will only have been in the much more commercially based society of the lowlands that there will have been sufficient trade in whisky to draw it to the attention of the authorities; and it will have been that trade specifically which parliament tried to stamp out rather than anything which might have been happening further north. Why they should bother to try is another question altogether.

Unlike the situation in England, where for several centuries to come whisky would continue to be thought of as down-market product suited only for the lower and working class, in Scotland, it was an acceptable spirit across a much wider spectrum. James IV, for instance, was publically known to be a whisky drinker. That makes it likely that prominent members of his court circle will have enjoyed a dram as well. And it was in the nature of

Scotland’s particular brand of feudalism that Clan Chiefs and other major landowners will have had the pick of whatever spirits their tenants might produce.

Certainly, though, none of that provides the least justification for the upper classes (as was then represented by parliament) trying to limit the enjoyment of whisky to themselves. Indeed, since the source of most distillation remained in the hands of the masses, it would seem that the proclamation of 1579 was somewhat impractically based. It must have been widely ignored and only sparsely enforced. And quite rightly so.

All grew relatively quiet once again. For another sixty years or more the people were left unhindered to enjoy their whisky, as yet without serious interference on the part of the government. It can be fairly guessed that the number of stills in Scotland grew steadily, if unspectacularly, during this time. It was, in any case, a period of relatively good harvests, so barley will have been in quite plentiful supply for most of that time - and accordingly put to the best possible use. Regardless of other turmoils which were stirring around them (political and religious), the small whisky distiller will have been enjoying what was, with hindsight, the last of a golden age. For in 1644 one word was to enter the equation which was to change the nature of distilling irrevocably, and forever more be thought of in the same breath as whisky. That word was tax!

The first ever excise duty was introduced in that year by Charles I. Initially it applied only in England but was quickly followed by an equivalent measure for Scotland. It was the first of many continuing ironies from which Scotch whisky was to suffer over the centuries that so much politics should be caught up in the decision. As is well chronicled elsewhere, King Charles was forever in need of extra revenue - and had something of an aversion to asking



parliament to let him raise it by orthodox means. In the circumstances, whisky must have seemed a logical and largely painless (to him) target. Tragically, he had started a trend which was never to be reversed and to many of us that alone was sufficient reason to cut off his head!

There are those who might think that the Act of Union of 1707 would work in favour of whisky. That is to say, that one set of politicians would be capable of doing only half the damage of two sets. Nothing could be further from the truth. Just as the equalisation of wine and spirit duties across Europe is one of the burning taxation issues with which the modern industry must contend, so the dreaded phrase “bringing us into line with England” was to be the curse of the early 18th century.

Specifically, the English were in a lather over the ability of the cost conscious Scots to produce their natural spirit less expensively than the English spirit - gin. They didn't like the competition it provided and, now that there no longer existed a border between the two countries in any real sense, they could not even resort to any kind of import duty. The weapon they turned to instead was a tax on malt which was a vital part of Scotch distillation but which was not involved in the production of gin.

Predictably, even the threat of such a tax was enough to boost the level of illicit distillation; a practice which had been growing steadily since the days of Charles and his excise tax. Perhaps less predictably, it was enough to spark violent riots amongst the populace at large. These were politically sensitive times for other reasons too, and the government realised that it could well do without yet another excuse for mass insurrection. Reluctantly, they swallowed their pride (and reduced their tax), but they had by no means dropped the idea permanently.

The new parliament of the Union was less than inclined to leave the Scots with an in-built advantage in any field. It was only a matter of time before they would try again; and they did so in 1725.

Once again there was an upsurge in illicit distilling and once again the rioters were out in large numbers. It was then only ten years since the first Jacobite rebellion in favour of the “Old Pretender” and for the second time the government chose discretion as the better part of valour. The Malt Tax was only partly enforced once more, amid acrimony and lingering bitterness.

With hindsight, it might appear that the English resentment at their failed efforts to whip the Scots into line - and the widespread humiliation which accompanied it - was to colour relations for some time to come. Certainly, there followed nearly a hundred years of punitive regulation; each new measure more harsh and unjust than the last. Certainly, too, when the chance did present itself in 1751, with the Jacobite cause well and truly crushed, the government of the day wasted no time in equalising the Scots and English taxes, and removing for all time any advantage which the Scots might have possessed. This then was the time when illicit distilling was to balloon out of all proportion. These were the years when the traditional joust between distiller and excise man was at its height, and all of Scotland was their battlefield.

So why did these hardy characters choose to persist with their trade in the face of such continual adversity? Surely there were easier ways to make a living; ones which didn't carry the constant threat of arrest and imprisonment or fine. There were hardly great riches to be made from the practice. Indeed, the vast

majority of illegal stills were of very limited capacity; providing largely for personal and family use, and not much more besides. To understand why the small highland distiller was determined to persist, one must first understand how much a part of his way of life distilling had become. And to understand that, one must first understand the nature of distilling itself.

The tools of distilling, particularly in modern times, can often appear very complex. But equally, the process is eminently possible with the very simplest of tools and ingredients. Just as importantly, they would all be within easy reach of the prospective distiller.

Barley, would, in any case, be amongst his staple crops. Fresh water would unquestionably be to hand. Yeast, too, could generally be obtained without difficulty. Add to that the likely availability of peat and all the basic essentials are in place. It would almost amount to a dereliction of duty not to distil in these circumstances.

Is it any wonder that he was so reluctant to give up his harmless pleasure? Is it surprising he was so prepared to defy excise men if that is what it took? And let no one underestimate the scale of the illicit distilling and smuggling which did go on. We are not talking about a few isolated incidents. At its height there were 14,000 prosecutions in a single year for illicit distilling, and the figures were regularly close to that in successive years. It would almost appear that over a period of eight or ten years the entire population of the highlands must have been convicted of the crime; but for the fact that so many of those involved were caught and convicted repeatedly, thus boosting the figures.

Nor was there any dreadful stigma attached



to being found guilty. Rather, the illicit distiller was often a man of some standing in the community. He would be providing a valuable service, and the people would both seek out his friendship, and respect the risks which he ran. In more isolated communities, for instance, with many miles between inns, he would often be their only ready source of whisky, and therefore not to be trifled with.

Not surprisingly, the local sheriff (or magistrate), was no more anxious to see distilling cracked down upon than were his neighbours. Invariably, he would be a regular customer himself, and would be loathe to see his supplier put out of business for any length of time.

It was against this background of hostility that the much vilified excisemen had to work. The stories of how devious smugglers managed to dupe them are both legion and legendary. Perhaps the most famous tale originating from Ross, where a cask of good illicit whisky was impounded by excisemen in, of all places, a local inn. Just as did MacPhail and Para Handy in a greatly loved episode of the classic television series "The Vital Spark", the smugglers proceeded to drill a hole through the floor - in this case from a cellar below - to liberate the precious liquid. Left without the incriminating evidence, or even a dram of it with which to drown their sorrows, the red

off". It could all be gathered together in a matter of minutes and "spirited" away from the scene of the crime. Even if the distiller was disturbed mid-process, his equipment heavily laden with mash and spirit, it was no great disaster. Illicit whisky was so cheap to produce (particularly in comparison to its legal and heavily taxed counterpart) that no permanent financial harm was done if he lost a single consignment. He could happily dump the contents of his still, gather together his possessions and scurry away from the cave, cellar or shed where he had chosen to base himself.

Indeed, much more so than the whisky itself, it was the actual still, and in particular its worm (the instrument which condenses the vapour to form whisky) which was precious to the distiller. It was for that reason that the Excise would offer a reward "for capture or return" of these worms. But there were few informants willing to cash in on such an offer - and risk the wrath of their kinsfolk. More commonly, it would be the distiller himself who would "turn in" his own equipment; claim the reward, and use the money he had collected to start afresh with new equipment and stock. These were devious characters indeed, made all the more resourceful by their circumstances.

Another chronicler of the time quoted a



“THE TOOLS OF DISTILLING, PARTICULARLY IN MODERN TIMES, CAN OFTEN APPEAR VERY COMPLEX. BUT EQUALLY, THE PROCESS IS EMINENTLY POSSIBLE WITH THE VERY SIMPLEST OF TOOLS AND INGREDIENTS”

faced excisemen had to drop all thoughts of prosecution. And neither was this an isolated incident. Illicit distillers, with the sympathy and active support of their neighbours, were always able to have an edge on their pursuers.

Another disadvantage for the excisemen lay in the simplicity of the equipment the distillers would use. The basics could be very basic indeed. For instance, an 18th century historian lists the following as the essentials of illicit distilling; "a still, a worm, a tub to hold the goods, a coal rake, assorted cans and vessels, and a piece of wood to prevent the head of the still from flying

highlander as saying "distilling is almost the only method of converting our victual into cash for the payment of rent and servants, and whisky may in fact be called our staple commodity". This illustrates clearly the common man's reliance on whisky; and reliance can always breed resolve.

Do not imagine for a moment that the excisemen, even with all the weight of popular opinion against them, never saw success; that illicit distillers were never caught and punished. As I have already stated anything up to 14,000 per year were convicted, so by any standards that must represent a considerable strike rate

of success on the part of those enforcing a wickedly unpopular with law.

It was simply that the reluctant magistrates, ineffectual punishment and a community ever eager to assist the illicit distiller in starting up again, this was a problem which was not easily expurgated. To the exciseman, it must have seemed that he was required to stamp out both ends of a very long and fast burning fuse simultaneously.

As one exciseman lamented in an often quoted record, "the distillery is in a thousand hands. It is not confined to great towns or to regular manufacturers, but spreads itself over the whole face of the country, and in every island from Orkney to Jura. There are many who practice this art who are ignorant of every other, and there are distillers who boast that they make the best possible whisky, yet cannot read or write, and who carry on this manufacture in parts of the country where the use of the plough is unknown, and where the face of the existence was never seen. Under such circumstances it is impossible to take account of its operations..."

One can imagine this report being accompanied by the tearing out of hair and the gnashing of teeth. It reeks of frustration.

Bluntly, so long as there remained an eager market for illicit Scotch the problems which the exciseman faced were going to remain. And an eager market place there most certainly was. When Dr Johnson toured the highlands and islands he observed that the Hebrideans in particular never rose of a morning without quaffing a measure of whisky for breakfast. This he labelled a most curious practice; even more so since none of the locals seemed to become intoxicated from it. It was not simply good enough to explain by their hardy nature, he concluded, rather they appeared to have built up some sort of immunity from centuries of imbibing the stuff.

One can readily imagine the reaction of the more delicately constituted Johnson and Boswell as they were first exposed to such behaviour. But they - and many others after them - would have found the welcome and the hospitality of the islands, a great deal colder, but for the efforts of the illicit distillers. And so the pattern went on.

The report of the parliamentary committee of 1799 tried seriously to address the problem (whilst completely ignoring its root cause). It spoke of enforcement; of realistic accounting; of better implementation of the law. But its tone was both resigned and uninspired. Smuggling and illicit distilling, it seemed, would always be with us; and the only way to tackle it was to haul more



"criminals" before irresponsible magistrates and see them given even heavier fines.

About this time illicit distilling, and the crackdown upon it, achieved something of the status of a cause celebre. Not a week passed without an irate member of parliament voicing his opinion in the Commons, or a government minister being bombarded with correspondence from an English gentry appalled by what they saw as uncivilised highlanders brazenly flouting the law of the land. In contrast, many prominent Scots landowners were equally strident in favour of reform, and showed open sympathy for the illicit distillers. These were men whose tenants were the very smugglers who were being hunted and who were most likely to be on the receiving end of a regular supply of whisky themselves. Men like the Duke of Gordon, who were to be instrumental in the reforms of 1823 and whose tenant, George Smith, was to receive the first ever license for his Glenlivet Distillery. But there were to be several throws of the dice yet before the age of legitimacy would dawn. The illicit distillers were still holding the upper hand, so only they would decide when to "hang up" their stills.

"The deil cam fiddlin' throu' the toun, and danc'd awa wi the exciseman", wrote Robert Burns, who himself served for a spell as an excise officer (although one wonders how he found either the time or energy to do so, given the number of illegitimate children he managed to father in between). And, on reflection, one wonders just how typical an

exciseman he might have been. Famous as both a lecher and a drunk, it is more than possible that by his time the authorities had turned to a "poachers turned gamekeeper" philosophy. It does, after all, take a thief to catch a thief; and such were the wiles of the smugglers that only those well versed in their tactics could reasonably set about catching them. All the little ruses which they employed had first to be recognised before they could be countered at a cottage when the excisemen were paying a call, lanterns strategically placed in the window to announce that the coast was clear. Simple, of course, but enormously effective all the same.

For the long suffering exciseman the greatest irony of all must have been that in the vast majority of cases, he knew perfectly well who were the guilty parties. It would have been impossible for the illicit distillers to enjoy the status within the community which they did without word spreading. The problem was, only very rarely, that the culprits had to be identified. Rather it was that they had to be caught - and in flagrante delicto at that, otherwise the sympathetic magistrates would laugh the prosecution out of court.

And all of this had to be achieved in the most hostile of environments.

Not for the first time - the Scots people were faced with having to provide a stubborn and long running resistance to an unjust (and English based) law. There was only one possible conclusion in the circumstances. The law would have to be changed.

Positive Packaging



Packaging plays an important role in underlying the value of a brand, especially at the premium end of the alcoholic drinks sector. Packs offer huge opportunities for brand differentiation in terms of shape, print finishes & effects, opening and closing devices and they can also incorporate security features. Creativity in design or the use of special materials further helps to enhance a brand's impact and quality. The value of packaging in the sector has continued to rise reflecting the success of recent marketing activity that has led to higher export related sales. This has seen a greater number of premium gift cartons and tubes and a clear trend to experiment with different substrates to enhance shelf impact.

Alastair McIsaac, Business Development Manager, Chesapeake Scotland, explains, *"Packaging has many functions to perform but brand owners and product manufacturers increasingly see packaging as a form of advertising. Some 75% of all purchase decisions are made by consumers in front of the shelf. This means that if a packaging format is attractive, easy to recognise and stands out on the shelf, it will have an advantage."*

During the last few years, there have been a number of exciting new packaging developments. Over this period, there has been a general move to retro styles reflecting a wave of nostalgia that has seen a surge in demand for mid-20th-century style home-wares, vintage clothing and books. It seems 'quality' is associated with things of the past so as well as colour and design for packaging, textures have also been important. This has seen cartons incorporate print finishes & effects that include techniques that provide tactile qualities such

as 'soft-touch' varnishes or inline reticulation processes that add prominent varnish lines. Micro-embossing combined with varnish techniques have been developed to produce the effects that mimic nature, such as leather, stone, wood grain or snakeskin. 3D qualities are important and effects that provide depth and the impression of movement are also in demand. Chesapeake's 'Glint™', a printed holographic effect, which was initially applied to beer labels, is now enhancing cartons too.

New materials such as Chesapeake's Impressions™ will provide new ways of providing further pack differentiation. Chesapeake's Impressions™ is a unique paperboard concept provides a truly 3D quality to any pack. Impressions™ is formed by using a specialist low energy process which makes it possible to form a paperboard material into a complete range of distinctive shapes. This exciting development can help to promote and complement a brand – from tactile profile lines to replicating the distinctive shape of a whisky bottle. Carol Hammond, Head of R&D at Chesapeake, said, *"Using Impressions™ we can create an embossed effect that simply hasn't been achieved before. This provides a tactile quality that is so outstanding you feel compelled to touch the pack."*

Over the past few years, there have been developments in spirally wound and composite tubes which have ensured this packaging format is a cost-effective replacement for tinplate containers. The tube can be decorated in a limitless range of colours, enhanced by a foil, varnished or embossed finish. An extensive range of shapes - cylindrical, oval, triangular and square - are now available which allows

further brand differentiation. The most recent innovation has been a new innovative tube which incorporates an aperture.

The new pack provides product visibility allowing the purchaser to see the product as well as the front and reverse of the bottle's label. The pack's shape helps to maintain its strength despite the aperture and the pack now offers possibilities for many other products and markets.

Chesapeake provides a full range of printed products to the alcoholic drinks sector including self-adhesive and wet-applied labels, folding cartons, composite tubes and shaped boxes. Its capabilities include a variety of complex and intricate finishes utilising both lithographic and flexographic printing techniques on a range of substrates including board, plastic, paper and fluted materials. Alastair McIsaac sums up the company's commitment to the industry, *"Cartons, labels and tubes are integral to the final product so our response is to offer a wide product range. This emphasises our focus on the industry."*

This dedication to protect and promote the world's great brands will see Chesapeake help lift the value of these products for years to come.

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Tel: 01355 574000

Fax: 01355 230377



new TRICKS

At Chesapeake we're proud to innovate award-winning packaging solutions for some of the world's leading drinks brands.

But we're also delighted to form new partnerships with more specialist businesses, leveraging our industry expertise to enhance and promote emerging brands in their fledgling stages.

Kilchoman

Islay-based farm distillery, Kilchoman is the first of its kind to be opened on the island for 124 years, which makes our recent collaboration all the more rewarding. With impressive global resources, industry-specific design expertise and extensive local capabilities, Chesapeake is perfectly placed to create the luxurious bespoke cartons, tubes and labels that make a premium product - *like Kilchoman's single malt whisky* - stand out from the crowd.

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This is the only way to drink Scotch Whisky

Says Robert McCall, Magazine Editor
& Renowned Whisky Expert

For champagne, brandy, wine, or indeed, for a plethora of other spirits and liqueurs, there has always been a particular glass which seemed just right. That special shape; that special feel; which served to add that special something to the overall drinking experience. It was expected - and it was quite inconceivable that it should not be the case.

Yet Scotch Whisky, the world's number one premium spirit, and a drink of true refinement by comparison to some of the others mentioned above, will as often as not be served in any receptacle which just happens to come to hand, from a hi-ball glass to a paris goblet, and often much worse.

"Awa' wi' Brandy burning trash!" wrote Burns, and yet that roast-fisted rival can command the finest in glassware, as a matter of impudent course.

Something had to be done.

Almost inevitably, the US Cavalry came in the much loved and much respected form of one of Scotland's best renowned small businesses, and regular suppliers to every corner of the Scotch Whisky industry, Glencairn Crystal.

For over 30 years, they have been producing bespoke crystal glasware of the highest quality, gaining a reputation for expert craftsmanship that has, in turn, helped them to gain recognition as the UK's leading supplier of decorated crystal. Indeed, in my personal view, it was the long-standing acquisition of that reputation which granted them the moral authority to solve the ongoing conundrum, of the creation of the perfect whisky glass! The Glencairn Glass!

Working on the original design by Raymond Davidson, which he had first put to paper some 25 years before, Glencairn Crystal

called on the experience and intuition of master blenders from the five largest whisky companies, and used that invaluable knowledge to adapt and improve his original concept. Priority was given to enhancement of the whisky drinking experience; to the accentuation of everything that is best about Scotch Whisky.



As a matter of necessity, as well as choice, the Whisky Glass design should help educate in every aspect of the enjoyment of this unique spirit. It must, perforce, enhance the experience through nosing the whisky, as this was such a matter of neglect in most ordinary glassware. And above all, it must feel just right, in keeping with the importance of its task!

The result was an immediate success. The design received the Queens Award for Innovation and went on to receive numerous other marketing awards. Today, this same

glass can be found in regular use by every distillery in the United Kingdom & Ireland, and in many more around the world. Given the repute of Glencairn Crystal, I am tempted to observe that only they could have pulled off such a coup, and by doing so, filled such an important little niche in the history and development of Scotch Whisky.

As a family company, they have always matched the quality of their product with a commitment to excellent customer service. It is that reputation as an easy to deal with family company that has driven their success - and which has served to cement such an important relationship with the Scotch Whisky industry as a whole.

Whether for one-off special presentations, high volume decanter and glass presentations, or simply corporate giftware, Glencairn has earned a reputation as the nation's premium service provider, offering cost effective solutions with stunning and lasting results.

Glass decoration has always been at the core of the business, with the UK's leading team of crystal engravers and screen print-operators at their disposal. Packaging, though, is also important. By keeping a close relationship with local manufacturers, they are able to offer a highly flexible and responsive range of packaging options; from silk lined or leatherette gift sets to high gloss, hand made rosewood decanter boxes. The range is superb.

Tonight, as most nights, I shall look forward to relaxing after work, by pouring myself a generous measure of my favourite malt, from my Glencairn decanter, into the Glencairn Glass which sits permanently at its side.

And the malt in question?

No, that would be telling.....

THE
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WHISKY DRINKING

www.whiskyglass.com



The Queen's Award
International Trade
2012

Over 500 Years of Scotch Whisky - Part 2

How to make the most of someone else's good idea



1824 - George Smith takes the first legal license to distil whisky in the Parish of Glenlivet

I commented earlier on the perennial debate over who might claim the most credit for the origins of whisky; the Scots or the Irish. But the rivalry between the two drinks - and their respective distillers - extends well beyond a simple disagreement about its origins. For centuries both have been competing for a similar marketplace, at home and abroad. Fortunes have certainly fluctuated throughout that time; largely due to the interference, periodically, of oppressive legislation and taxation. Thus the competitive success of distillers in selling (and later exporting) their product was only rarely in their own hands. In 1830, though, an opportunity arose which put that success within the power of the distillers themselves and which was, without exaggeration, to change the destiny of whisky beyond all recognition.

In that year, an Irishman named Aeneas Coffey - somewhat ironically serving as Inspector General of Excise in Ireland at the time - invented a much improved version of the Patent Still, which a Scots distiller named Robert Stein had first designed some four years previously. The Coffey Still was considerably more efficient; delivering with even greater effect Stein's original twin aims of increased productivity and massively reduced cost.

The idea was a simple one in principle, yet complex and necessarily ingenious in practice. Basically, the new still allowed for the continuous distillation of spirit; as opposed to the separate and repeated distillations associated with the old traditional Pot Still and the production of malt whisky.

Thus Patent, or Grain whisky, could be produced more quickly and to a higher level of purity, at a fraction of the cost.

Particularly given the chequered history of whisky up to that point, it seemed that surely this was an idea whose time had come. Here in one apparently God sent opportunity was the catalyst which might take whisky into the realms of true mass production and, given the pricing which was now possible, perhaps mass acceptability. Coffey knew he had a winner, and approached the Irish distillers with suitable self belief.

The reaction he was to receive must have filled him with horror. Fears of a bland and characterless end-product, plus a natural reluctance (to invest in new plant), of an industry which never knew where it might stand fiscally a year hence, combined to turn apathy into outright rejection. Disillusioned with his countrymen, Aeneas Coffey thrust his designs into a travelling bag and headed for Scotland, thereby altering the balance of power forever more.

Not unsurprisingly, the reception Coffey was to receive from the canny Scots was quite different. Lowland distillers in particular saw a tremendous chance to upstage their Highland competitors. Far from a handicap, they judged that the lighter, less robust flavour of grain whisky would contrast smoothly with malt. Even better, since taxation was levied specifically against Pot Stills, the duty free Coffey Still would accentuate the price differential which already existed in their favour through cheaper ingredients and faster production.

In short order, Coffey Stills were up and running, with production of the "new" spirit booming. In altering the balance of power in Scotland's favour - though of course it would be quite some time before it became clear - Coffey had also highlighted to a far greater degree the Highland/Lowland divide which characterised the



1827 - George Ballantine opens his first grocery store in Edinburgh

internal Scots market. The two regions now had, predominantly, quite different products to sell. Attitudes, inevitably, were to become entrenched; and it is certainly fair to say that the manner in which the industry was to evolve, thereafter, both in the Highlands and Lowlands, was to reflect circumstances which first became prevalent from the 1830s onwards. Even when, in 1838, the government moved to equalise their taxation policy, the Highland distillers, quite possibly still dazed by the pace of change, are unlikely to have felt that they were any longer competing on a level playing field.

Further developments in the Scotch whisky industry and its marketplace were rapid. Grain distillers, desperately anxious to make the most of the new opportunities in England and elsewhere, exhibited an entrepreneurial flair which previously had only been useful in terms of smuggling and illicit production. Now that they had a wholly legal conundrum to puzzle over they weren't going to let themselves down.

Realising that their competitors had a whisky to sell that was - to be fair - solidly based in its reputation, if a little strong in character for a mass audience, they sought to catch the best of both worlds. It seemed logical that a well balanced mixture of flavoursome malt and anonymous grain would be a winning combination. Blending was soon to become the most important of all whisky related crafts. Indeed, once established by statute, it gave new scope and impetus to an industry desperately keen to keep its momentum going. Cross blending, not only of the products of individual distillers, but across a range of different whiskies from different sources, opened the door wide to the more adventurous, more business minded whisky producers. Piece by piece, too, the economic climate of the time was strengthening through the Victorian age, encouraging an enterprise culture of which, perhaps for the first time, Scotch whisky was a vibrant and truly vital part. In every way, the middle years of the 19th century was a time for the industry to mature.

In line with all of this, the legislative straight jacket had just begun to loosen. In 1823 the curiously entitled "Act to eliminate illicit distilling" was widely interpreted as the first real attempt by government to give distillers (and the whisky drinking public) a fair deal; whilst also doing its bit, as the name suggested, to finally crack down on illegal distilling.

Its main provisions were to confirm the minimum lawful still capacity at 40 gallons;



1909 - Charles Howard, Chivas Brothers Master Blender creates Chivas Regal 25 year old blended whisky, the world's first luxury scotch

to reaffirm the removal of all previous distillation fees in favour of a single £10 annual fee; and to replace other capacity duties with a new single levy of shillings and 3 pence per gallon.

This may not immediately seem to amount to a new spirit of reasonableness on the part of the government. That it was only becomes evident when held against the compete unreasonableness of the previous fifty years and more. For instance, the slippery slope had first been broached in 1784 with the Wash Act. This was a poorly drafted attempt to stop the flow of Lowland whiskies across the border into England. It had the usual twin faults of so much whisky regulation at the time, of failing to treat Highland and Lowland distillers with any degree of equanimity, whilst at the same time attacking the problem with sledgehammer subtlety. It hardly seems important which of the two sets of distillers was favoured by this particular act; the essential point was that politics and whisky were an unhappy mix, and that parliament was demonstrating an

inability to be even-handed which was to plague whisky-making for decades. Worse, by introducing a whole new category of whisky taxation, they had given themselves a bigger and more effective club with which to beat distillers than ever before. Indeed, that club was to quickly grow to monstrous proportions.

“MANY SMALL DISTILLERS OF COURSE REACTED IN THE TIME HONoured FASHION; THEY MOVED THEIR STILLS OUT OF SIGHT AND DECLINED TO PAY ANYTHING AT ALL”

While the Wash Act had set precedents by introducing a flat rate license fee of £1 per still, plus an additional five pence per gallon of “estimated” still capacity, those rates were not going to remain constant for long. Modern day spirit drinkers will not be surprised to learn that 18th century

politicians, having discovered a new source of revenue, were unlikely to leave well alone. In 1793 the license fee was hiked by a massive 900%; four years later by a further 600% to reach £54, then in 1800 and again in 1803 by additional leaps of £54 each time. In the space of nineteen years, therefore, the level of taxation on each still had gone from £1 per annum to £162 - an increase of no less than 16,200%! Even allowing that this was at the time of a long and expensive war with France, there surely cannot ever have been any comparable industry to be penalised in such a draconian way. Next time one is tempted to moan (albeit justifiably) about the Chancellor of the Exchequer adding a penny or two on to the price of a nip, a brief reflection on what has gone before might prove quite sobering.

Many small distillers of course reacted in the time honoured fashion; they moved their stills out of sight and declined to pay anything at all.

The war had, in any case, proven the catalyst for smuggling between Britain and France to multiply several times over. Coupled with the climate in whisky distilling, it all made for another busy time for the excise man. Illicit spirit trade, in fact, had reached almost ludicrous proportions. It was becoming increasingly evident (to even the blindest of politicians) that something radical had to be done.

The swingeing tax reforms of 1814 were probably an honest attempt at improvement if nothing else. The horrendously unfair and notoriously difficult to calculate tax

on capacity was dropped completely, in favour of a much more simple duty on Wash (later to be refined in the 1823 Act). Even better the £162 license fee, which was rapidly becoming the laughing stock of Europe was arbitrarily cut to a much more reasonable £10. This though, was far from the end of the tale.

Smaller Highland distillers in particular had, quite frankly, an in-bred aversion to paying any tax on their whisky. For generations they had considered distilling to be as natural a resource on their farm or croft as, say, the barley itself. They made whisky for their own consumption, for their family, and for their neighbours and friends; and, almost peripherally, for selling.

It hardly seemed logical that the government should be claiming a share of the meagre income it brought in. They would have to feel that they were getting something quite genuine in return before they would be prepared to conform.

That, in part, was what the historic Act of 1823 tried to achieve. Its sponsors recognised that only in an atmosphere of fairness and truly equitable taxation would the hard pressed distillers be openly prepared to declare their activities. They also realised that only once this was achieved could the whisky trade take its place in the economic revolution which was going on around them. Legitimacy was a prerequisite to future progress (potentially very great progress) and the “Act to Eliminate Illicit Distilling” was to provide a much needed foundation upon which to build.

That this era of legitimacy should dawn only a few years before the advent of the Coffey Still and all that that entailed was both ironic and uncommonly fortunate. And, like all such times in history, there was a small number of enterprising men who were able to take advantage of the turn of events. In the middle and later years of the Victorian age, whisky entered into a new era; of blending, of expansion and of great distilling and trading houses. As it did so, names were to come to the fore, which even today, are synonymous with Scotch Whisky. Things would never be the same again.



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For it to then leap forward to become both a product of considerable international renown and one of Great Britain’s most important and successful industries will have required some enormous strides, over a considerable period of time.

One of the more curious events which affected that rise was the imposition of prohibition in the United States. This provided one important landmark in that momentous progression, but not without controversy and a great deal of angst.

Every schoolboy will be aware that American efforts to see the grain supply put to non-whisky related use, and in the process to sober up their nation, did not exactly go as planned. However, less well known is the part which whisky distillers played in breaching the law.

There were numerous direct consequences of prohibition. Amongst them a widespread flouting of anti-drink law, a drastic rise in violent lawlessness (and consequently in the power of the gangsters who controlled it), and eventually the election of Franklin D. Roosevelt as president on the promise of a “new deal”, including the abolition of prohibition. It was a frightening time, when fortunes could be made by men prepared to be unscrupulous; a breed of men quite different from the smugglers and illicit distillers who had kept whisky drinking alive during earlier troubled times.

Of course, no one is suggesting that anyone from the Scotch whisky industry was ever involved in the gangsterisation which accompanied the flow of illegal liquor, not that they supported it in any way. But through the devious means which they employed to get their whisky into America some did unquestionably supply the whisky-lords with the basic instrument of their power. “What



is bootlegging?” Al Capone once famously asked, “On the boat its bootlegging, on Lake Shore Drive its hospitality”.

If the wealthy patrons of Lake Shore Drive in Chicago could be flexible with their morality then the smugglers could hardly be blamed for employing the same blind-eye. There were others in those days who suffered more directly from the bootleggers, but perhaps to be strictly fair the real blame should lie at the door of a crassly stupid law. It wasn’t the first time that whisky had been subjected to such a law and I won’t tempt fate by believing it will be the last. This, though, was a particularly bloody and unattractive political mistake.

Having said that, the whisky producers were remarkably scrupulous in the methodology of their involvement. Their actions were always in accord with international law; right up to the moment the whisky left their ownership

at least.

Basically, the system involved selling the whisky in bulk to whisky “agents” based in the Caribbean, whom the whisky companies themselves had set up. It was then taken by ship out to international waters where the agents would rendezvous with the bootleggers and simply offload their merchandise at a vastly inflated price. Very legal, very profitable and very clean.

It hardly mattered that everyone, including the United States authorities, knew what they were doing. It was after all, difficult to pretend that the exportation of up to 100,000 bottles of whisky a year to Caribbean islands with a population numbering one tenth of that was for the genuine consumption of the natives! But its blatantness certainly did not make it any easier to stop. Both the whisky companies and, to a slightly lesser extent,

their agents, were outwith the jurisdiction of the United States - the only country with an interest in seeing the smuggling stopped (Britain was certainly glad to see its whisky industry given a lease of life, whilst the economies of the Caribbean islands involved were also doing very well out of it). So the only legitimate targets for the U.S government were the small boats of the bootleggers travelling to and from the rendezvous.

Over a thirteen year period the coastguard and navy fought a sometimes bloody, always frustrating, and very largely fruitless war against the smugglers. Proportionately, it cost them far more time, money and manpower than better publicised battles against illegal alcohol - and had a far greater impact internationally. Numerous protests were made to Britain by the Americans, and they even got as far as signing a series of joint declarations of intent. But the heart of the British government was never in it and their cooperation was never more than half-hearted. The vested interests involved had already become too great.

Certain whisky brands had sprung up specifically to capitalise on the situation and were already selling in vast quantities. Far from the stigma of illegality, they would go on to even greater success after abolition.

The similarities with the years of illicit distilling became more striking as the years of the conflict passed; at least so far as the Scottish end of the equation was concerned.

And just as in that earlier time, the end was inevitable. In 1933 prohibition was wiped from the statute books, and normality (of a kind) was set to return.

The immediate and inevitable consequence was an almighty scramble for the newly legitimised American market. In an uncanny throwback to the reforms of 1823, distillers and merchants sprang up across America, virtually overnight. Literally thousands of brands became available to the public within the first year of abolition. That was the level of competition which Scotch whisky suddenly found itself facing - if it was to maintain the same level of prominence in the legal market as it had done in the illegal one.

But tough though the competition might be, the network of contacts which Scotch whisky had built up over the years of prohibition were to stand it in good stead. In addition, the American public had developed a taste for Scotch whisky which would be difficult to lose. In difficult circumstances (and we can all guess the treatment Scotch would be subjected to after being served in "Speakeasies") it had somehow managed to



establish a reputation for consistency and quality. Faced with such an incredible array of new labels from which to choose, the American drinker was to find much solace in these qualities.

And that is an important point to remember.

In one sense whisky had a head start in being easily recognised as something of a macho drink, eminently suitable for a Hollywood hero. It could happily be quaffed straight, or with ice, which made for better image-making than clear spirits which would

“REGARDLESS OF WHAT ANYONE MIGHT SAY ABOUT SMUGGLING OR CLEVER MARKETING, THE REAL CLUE TO THE ASCENDENCY OF SCOTCH WHISKY LAY IN ITS SHEER QUALITY”

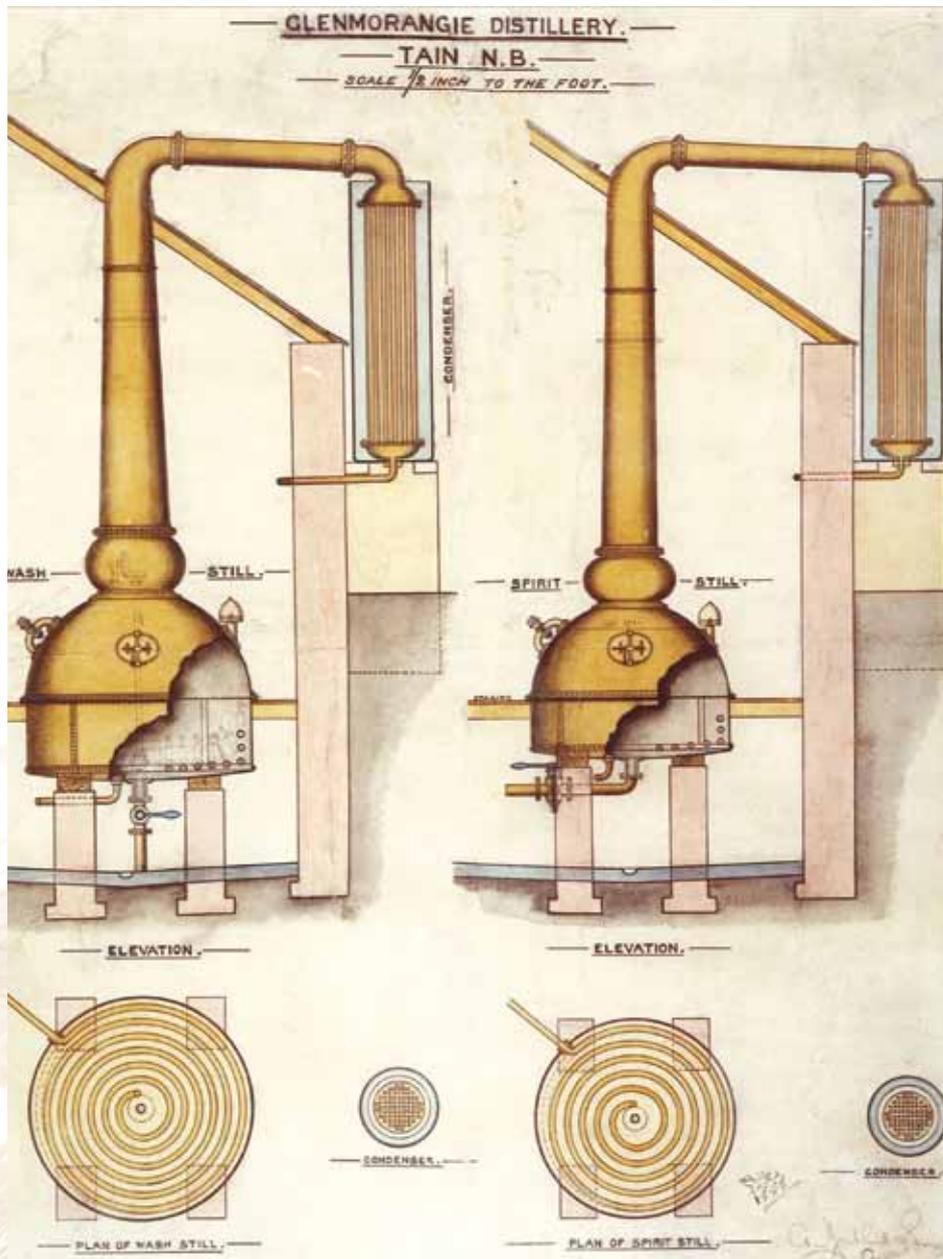
Regardless of what anyone might say about smuggling or clever marketing, the real clue to the ascendancy of Scotch whisky lay in its sheer quality. Let no one ever tell you otherwise.

That said, a new era of marketing was about to begin. A decade before, talking pictures had brought in a sensitive new promotional tool which could be easily directed at a massive and susceptible cinema-going audience. A fresh challenge was set. To establish Scotch as the choice of the sophisticated drinker. When a Hitchcock hero steadied his nerve with a drink it had to be a Scotch on the rocks. When Bacall left her lipstick on a glass on Bogart's desk it had to look like a Scotch. And better still if the bottle was on view and the label turned towards the camera.

require the dilution of a mixture. Names like Johnnie Walker, Dewar's and Haig were suddenly to find themselves with enormous exposure in the biggest marketplace in the world; and they were well up to the task of capitalising upon it.

Of course, movies were not the only medium which shaped attitudes during the 1930's. Whisky advertising made the most of all the positive Scottish images which a sometimes over romantic American public might appreciate. Images such as bagpipes and the kilt would abound, to the amusement (and annoyance) of all those who know just a little more about genuine Scots culture.

Lest anyone should think that the success of these campaigns could be attributed solely to the lack of sophistication of the American



buying public, it should be remembered that they were enjoying equal success in almost every part of the world. To date Scotch whisky sells in 200 countries - that's almost every member state of the United Nations - and the majority of those marketplaces were first exploited in the years immediately before and after the Second World War. When the war arrived it brought the predictable cuts in production due to the shortage of grain, but unlike the bitter experiences of the First World War there was no secondary motive to the persecution of the industry. Perhaps for that reason; and also because by that time a sizeable portion of the industry had a much broader financial base, the whisky companies were this time

better placed to survive.

Another significant difference was the attitude of Winston Churchill. This manifested itself particularly at the end of the war, when the industry badly needed such a boost to help it reassert itself. It was then that he sent the famous memo to one of his juniors, singling out Scotch whisky as being worthy of support.

"On no account reduce the amount of barley for Scotch whisky", he wrote. *"It takes years to mature and is an invaluable export and dollar earner...a characteristic element of British ascendancy"*. This marks a seminal point in the reputation of Scotch whisky. It shows it as a standard bearer of all that was British and best; a label which it would

never have been gifted from such a high powered source only a few years before. It is just a pity that a few more of Churchill's predecessors as Prime Minister didn't have a similarly enlightened view. However let us be charitable and simply call it better late than never. Certainly, the way the American's viewed anything that Churchill said, it won't have done it any harm at all.

If the word "recovery" after the First World War had been noteworthy, that which followed the Second was quite spectacular. In the first year after hostilities ceased, even with the assistance of obvious "celebratory" factors, the exports of Scotch whisky worldwide amounted to only about 5.5 million proof gallons. A respectable figure, but one which was soon to be dwarfed. Over the following decades its growth was steadily spectacular, reaching a peak of some twenty five times that 1946 level. It was a conquest of the world of which Caesar or Alexander would have been proud. And which was achieved in the teeth of fierce opposition. And ruthless imitation; the latter from the Japanese in particular.

Nothing can seriously detract from the level of success which Scotch has now achieved. It is a natural number one. A quality product which is now recognised as such worldwide. In the same way that only very few individuals are ever "great" enough to be recognised the world over by their first or last name (Ali, Elvis etc) so scotch more than any other spirit has achieved that same degree of immortality for the names of some of its brands (Red Label, White Horse etc). Hardly a barman or waiter the world over would fail to know precisely what you were ordering. If anyone doubts that only scotch has achieved this level of fame, then let them try for a while asking for individual brands of vodka or gin wherever they go and witness for themselves the patchy response.

Despite the predictable drop in spirit sales which briefly accompany each dip into world recession, Scotch whisky has continually kept its head up, without any of the blows it has suffered over the years ever looking likely to be terminal. It is true that many distilleries have closed periodically, but this has been as much due to an on-going process of rationalisation as any perceived drop in demand. The closure of any distillery, particularly an old and much revered one, is always an occasion for sadness. But it is the success and survival of the industry as a whole which mattered most at the end of the day. And Scotch Whisky is undoubtedly a story of success.



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Over 500 Years of Scotch Whisky - Part 4

The making of the “water of life”

Whilst the primary concern of this chapter is to describe the making of Scotch Whisky in all its glorious detail, it may be necessary to first answer the question, exactly what is Scotch? In other words, what exact qualities and features must a distillate possess before it may be identified as Scotch Whisky? What level of deviation from the normal (that is to say, accepted) method of production is allowed whilst still retaining the right to that most revered of names?

It has already been commented upon in Part One that the early distillers will have used much less sophisticated production methods than are in use today. Their tools and ingredients will have been fewer and simpler, and far less of those will have been considered essential. In other words, these early distillers will have produced, by very basic methods, a drink which they happily classed as Scotch whisky but which, conceivably, might not meet the more lofty and complex modern production criteria.

The battle of words concerning the definition of Scotch whisky only really reached its climax within the last century. It was a battle, in fact, for the heart and soul of whisky; and will greatly surprise those who now take certain standards for granted.

The lobbying by the whisky companies had already prompted the setting up of two select committees on the subject and the occupying of many hundreds of parliamentary hours by the end of the 19th century; to very little effect. That this had not succeeded bore no reflection on the fervour of their efforts, nor of the strength of public opinion, which was largely sympathetic to their cause, (wanting to know exactly what you're drinking being a fairly natural instinct, after all).

But those parliamentary defeats were far from the end of the matter. Indeed, the malt whisky



distillers only had to wait one more year, until 1906, for the showdown they craved.

It had a touch of the bizarre about it; as these things often do. A small scale local prosecution which suddenly took on national significance, and with that, massive press coverage. Not unlike the “Darwin” trial which Spencer Tracy immortalised in “Inherit the Wind”. In this case, though, the question before the court was much more important than merely the origins of man. Here they had to decide the very nature of whisky.

The case in point was a simple one. A London Borough was prosecuting a blended whisky merchant for selling a product that was inconsistent with the quality which the name implied. A guilty verdict would be a

declaration that Scotch whisky had defined legal standards which could not be breached whilst still retaining the name. A not guilty verdict would be a powerful restatement of the status quo.

In so much as it is the job of parliament to make laws, and of the court to merely enforce and interpret them, the opposition faction must have been enormously confident of success; since clearly parliament had rejected every attempt to put such a legal definition on the statutes. How then could any court justify ruling against them? Well, somehow, they did just that. They ruled overwhelmingly in favour of the council, declaring that the selling of sub-standard whisky was in breach of the law. With an irony which escaped few, it was left

to one of the arch opponents of the whisky trade, David Lloyd-George, to enact the next positive legal move regarding whisky. That came in 1915-1916 when the then Secretary of State for Munitions helped to push through the Immature Spirits Act, decreeing for the first time that whisky should have a minimum period of maturation. Initially this was set at two years but then extended to three years by a later amendment.

Whatever his motives might have been, Lloyd-George had inadvertently given the industry a new stamp of respectability and quality which went a long way to repairing the damage wrecked by the earlier Royal Commission. Even the potential financial loss of distillers suddenly having to leave their whisky in bond for a longer period was partly negated by restrictions on sale already imposed by the war - although some smaller distillers did suffer badly. But, certainly in the longer term they had every reason to suppose that a better, more mature product would recover from the ravages of war.

Whilst there has been tinkering with other definitions of quality and terms of sale in relation to whisky, the minimum period of

maturation has remained constant since those days.

From those early beginnings, Scotch whisky is now defined in the Scotch Whisky Regulations 2009 and recognised as a product of Scotland all around the world.

Thus, in describing the process which is the making of Scotch whisky, we have sensible criteria around which to work. These can be summarised briefly.

In the case of a malt whisky, it is the alcoholic distillate of the fermented state of a mash formed by malted barley in solution, where this distillate has been matured for an appropriate period of time. In the case of blends, it is a combination of whiskies where a sizeable proportion has been distilled through a Patent or Coffey still (ie continuously) from an original solution of un-malted barley or other cereal grain.

Of course, such bare technical definitions have only limited worth, telling only a small part of the story. The flesh of the tale is much more interesting, particularly for those who have ever pondered how certain aspects of the distillation process can directly affect the

taste of the whisky in their glass. In actual fact, it is the variations in each stage of the process which impart to the finished article its individuality and character.

It is often said that it is Scotland's water which makes Scotch whisky so difficult to mimic to an equal standard elsewhere in the world. And, unquestionably, our water is one of the factors which others must find most difficult to imitate.

The variation in the quality of water is not, however, solely an international one. Even within Scotland, that variation can be considerable. A number of factors can be responsible. Pollution of the water itself might be the most direct and obvious; but pollution of the air can be just as easily transmitted to the flavour of an open stream. The slightest impurity can have a spoiling effect. And that goes for mineral content also. It is well known that the softness of Scottish water is at the root of its success. Perhaps less commonly known is that the speed of a particular river or stream can be crucial. The River Spey, for instance, is actually the fastest flowing river in the British Isles, and I count it as no coincidence that so many famous malts (including most of my



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own favourites) originate from this source.

But if water is so important, how could the quality of the barley be any less so? Perhaps surprisingly, this is one area in which Scottish is not necessarily best. While the majority of the barley used for whisky production is Scottish imported (if one includes England as an “overseas” supplier, that is) in order to meet demand and overcome weather related growing problem there will often be other, more commercial reasons for this, and certainly there is nothing.

If it is not the best then it is not inferior either, and certainly the early distillers will have had nothing but local barley at their disposal. In selecting which to use, the only criteria which they will have employed would be that it must be ripe, dry and clean.

We shall assume that yeast, the only other essential ingredient, performs its task universally well. Of far greater interest as a “variable” is peat, which can be used to fire the kiln at a vital stage in production, and it is at this stage that it can impart its distinctive flavour to whisky. Islay malts in particular tend to be very heavily peated, although this can be exacerbated by the salty, seaweed flavour which some island malts are also liable to carry.

So what of the process itself? The first step is to malt the barley. This covers a series of operations under carefully controlled conditions. A precautionary spell in a lightly warmed kiln will make absolutely sure that the barley is dry, thus preventing moulding while it is left in bin-like containers to rest.

Incongruously, the next move is to have it steeped in water, usually for two to three days, until the grains have absorbed sufficient liquid to allow germination to take place. It is then drained and the barley traditionally spread on a dry clean floor, in what is usually called the malting house, where the temperature can be constantly monitored and controlled while germination proceeds. At this stage it is important to have the layer of barley raked to prevent the mesh growing fibres from interweaving to become a carpet, but this must be done gently and with a degree of expertise as it is just as important not to damage the individual grains.

After about ten days on the floor, during which time it is regularly raked and turned to allow it to breathe, the barley traditionally has reached the required level of germination - and it is vital that it is prevented from growing any further. Today it is more usual for the barley to be prepared

by a commercial malter. This is achieved by a further period of drying, more rapidly this time, in a kiln sometimes including peat. Drying not only arrests the growth of the barley, it is a noteworthy moment in that it is here that the distinctive peaty flavour is imparted to the malt. The quality of the peat and the quantity used will have a direct bearing on the flavour of the finished product, its peatiness or otherwise.

The newly flavoured malt, which will have developed a slightly brittle texture from its virtual toasting in the kiln, is then ready for the next important stage, commonly known as mashing. It is prepared for this by being dressed; that is to say the tiny rootlets extended from the actual grain are separated and discarded by means of a kind of rustling, sieving process. The barley is then coarsely milled to become a grist, or very rough flour, which is fed into large tank-like containers called “Mash Tuns”.

Next, large quantities of increasingly hot water are added, whilst the resultant gruel is continually being stirred. Anyone who has ever under-cooked porridge oats will be able to imagine quite accurately what it looks like at this stage.

After a further bout of continual stirring to break down the starch, the liquid is drained away. Further hot water is added to the more solid but still gruel like residue and the entire process repeated, ending with a second extraction of the sticky, rather cloudy liquid, or wort as it is now known. There may be other extractions taken, but depending upon their quality it is more likely that will be taken back a stage - to be added to a fresh batch of grist and simply recycled.

Of course, eventually there will be a quantity of the solids from which no further extractions may be taken, and this is generally sold off as animal foodstuffs. This is only one of numerous by-products of whisky making which have a further value. The yeast used in the next process, for example, that of fermentation, transforms itself into a more suitable state for the making of bread. Much more importantly, however, in doing so it introduces alcohol into the equation for the first time.

The wort is fed into large closed topped vats known as wash backs, ready to receive the yeast. As it is added, fermentation commences almost immediately, bringing in its wake a rapid frothing which will only slow as the level of alcohol in the mixture steadily begins to rise.

Up until now, the methodology has been

not dissimilar to the making of beer; indeed there are many references in older records of the making of “uisge bheatha from ale”. At this point, however, the two processes begin to digress quite markedly.

The liquid - or wash - is once more drained off, this time into a wash receiver, the Excise representative first becomes involved, agreeing in conjunction with the distiller how much proof spirit each quantity of wash can be reckoned to produce.

From the “receiver”, the wash is then pumped into the still itself (the “wash still” as the first of the two stills is known). This will be made of copper and its traditional shape has a slightly oriental, slightly comical look to it; an oval base rising to a narrow neck, which in turn leads to an invaginated coin, or “worm”, which will be temperature controlled to condense the vapour passing through it.

Once again, the process is wonderfully simple. The liquid is gradually heated, the alcohol evaporates off, cools in the “worm” and is gathered in the condenser. However, it is not yet ready to be approved. A second distillation is required in the “low wine” or “spirit still”, which for obvious reasons is rather smaller than the “wash still”.

A deft touch is required at this stage. The earliest distillate (and also the later stages) will not be of the highest quality, and will have to be redirected to the “low wine” receiver. It is the middle strain of distilled liquid which is acceptable, and by choosing the appropriate moment to tap-on and tap-off the experienced still operator will direct only the best quality distillate into the spirit receiver. In practice, he will be able to draw off small quantities into a “spirit safe” where he can test it for strength and purity, rather than risk contaminating a much larger batch. He can then redirect the flow as appropriate, his suspicions either confirmed or altered by what he finds.

It cannot be stressed too greatly the importance of this judgement. The policy of a distillery - and the actions of the stillman in carrying out that policy - will determine at which strength the “cut” should be made; and with it the level of impurities that will be allowed to flow into the finished whisky.

The final distillation complete, the spirit will pass into the spirit store, and from there, in slightly reduced or diluted form, to casks. These will be transported to a bonded warehouse, there to remain during the length of its chosen maturation period.

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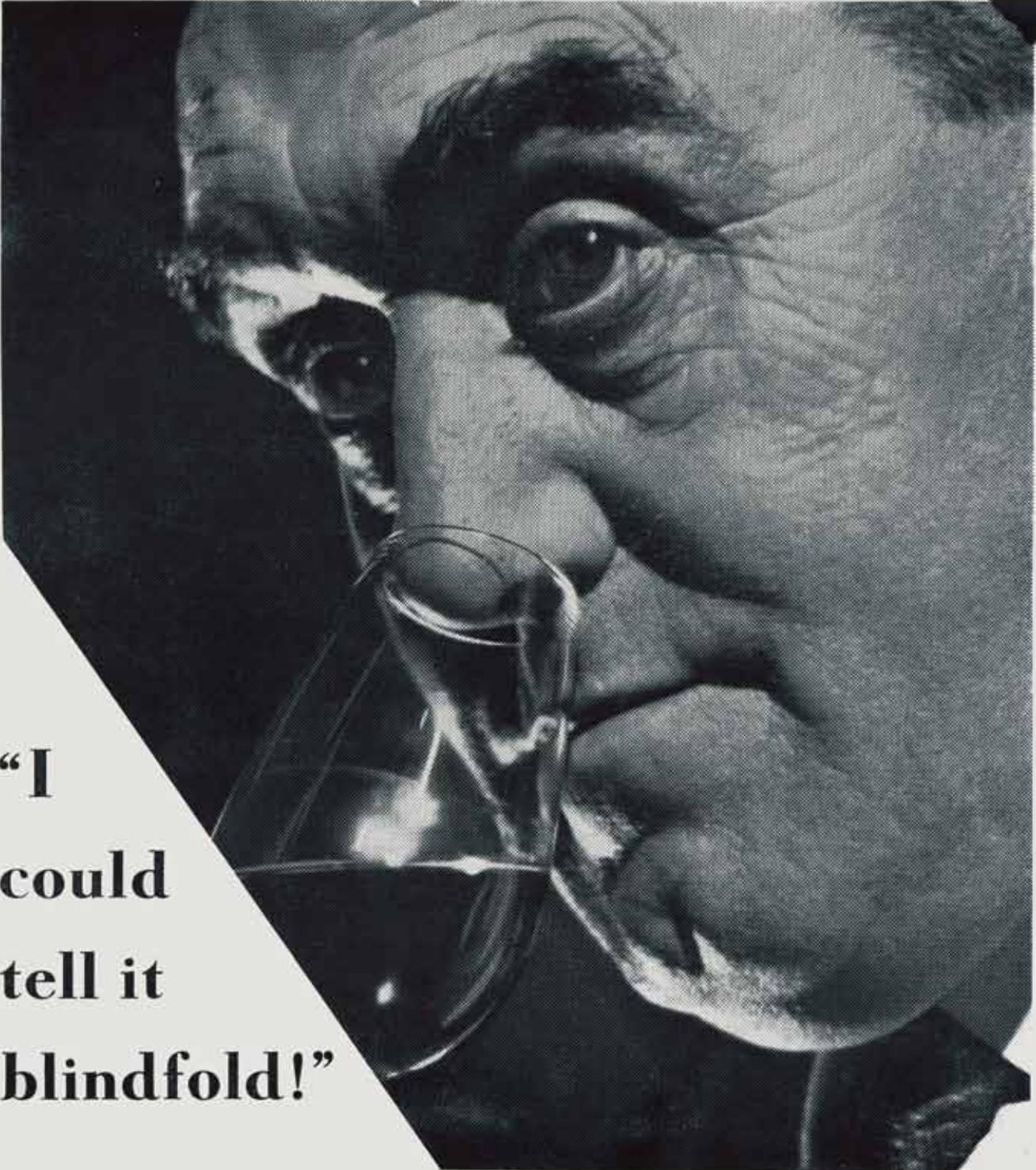
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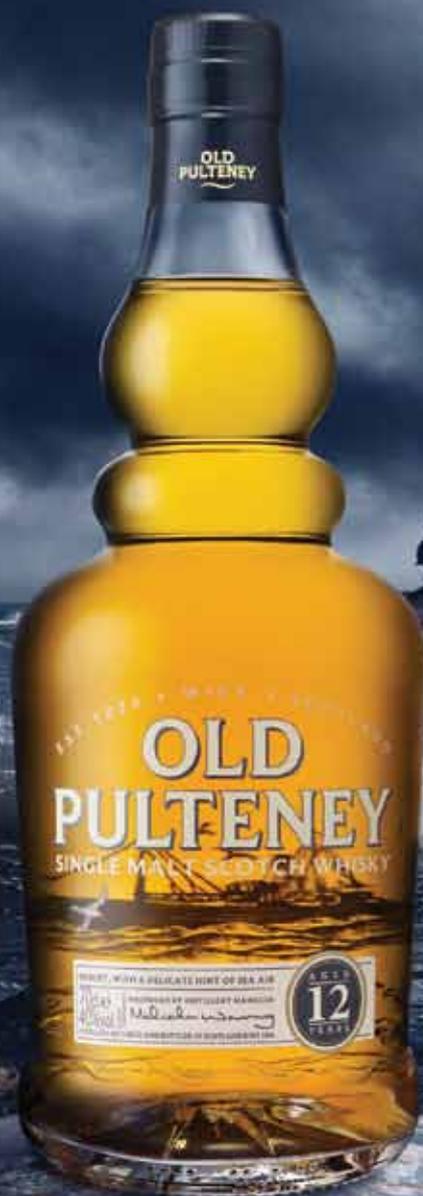
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