Value Chain Analysis – Speyside Malt Whisky

Workshop report

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The James Hutton Institute

MOVING

MOuntain Valorisation through INterconnectedness and Green growth

The James Hutton Institute

Summary

Two workshops were held in May 2022 to discuss findings to date in the value chain analysis being conducted by the James Hutton Institute, as part of the MOVING project. These workshops involved 15 representatives of different aspects and stages of the Speyside Malt Whisky value chain, including primary production, malting, distilleries, regional, environmental, research, youth, tourism, and consumer perspectives.

Figure 1: Distillery with mountain backdrop (photo credit, Sharon Flanigan)

Prior to the workshops taking place, an extensive desktop review, including websites, grey and academic literature, and government datasets, was conducted. This was supplemented by 16 interviews and four visitor experiences (Figure 1) to assemble information relating to the focal value chain (Speyside Malt Whisky), how it is situated across different spatial scales (local, regional, national, international), the conducive enabling setting (infrastructure, institutions, markets), and connections to an additional value chain (assemblage) situated in the case study region – food and drink tourism.

Among the key aims of the workshops was to present and discuss four diagrams representing different aspects of the value chain. Participants were separated into small groups (3-4 people) to provide time and opportunity for everyone to comment and offer suggestions and improvements. The four diagrams represent an array of information at an abstracted level. Additional layers of complexity and interest are also included in a detailed report, which accompanies the diagrams.

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Input generated at the workshops helped up to identify gaps and provided additional detail to support development of the diagrams. In some cases, workshop discussions also generated areas of uncertainty and debate.

Regarding the first diagram, representing the focal value chain, the main points were:

- A large amount of information is represented in an abstract form – which looks complex but illustrates the interconnectedness of components and captures 'softer' elements as well as harder processes and outcomes.
- Additional details and examples were provided which support fuller understanding of the value chain components and how the chain operates as a whole.

Regarding the second diagram, representing the spatial analysis, the main points were:

- The Speyside Malt Whisky value chain extends over national and international scales, resulting in differences in value and outcomes captured inside and outside of the Speyside area.
- The location of distilleries in mountain areas is historical and significant – while there was suggestion that companies were 'making it there because they have to', re-location is unlikely, and therefore opportunities for re-localisation of value and outcomes may be considered.

Regarding the third diagram, representing the conducive enabling setting, the main points were:

- Additional enabling infrastructure was identified (particularly housing)
- Additional institutions were identified and confirmed the importance of regulations and sustainability strategies that help with the valorisation of the product.
- Labelling and characterisation of the market and governance structures was debated.

Regarding the fourth diagram, representing the tourism assemblage, the main points were:

- Different elements of consumption are a key focus in the tourism assemblage including hospitality, transport, and other experiential components in the destination area.
- Tourism value chains are different from agri-food value chains, including that they are less linear and part of interconnected web of products at the destination level, which might be better reflected in the diagram.

Overall perceptions of the diagrams are complex and include a lot of information, but they tell a story. Some suggestions were made to improve the diagrams in terms of detail and structure, which are currently being considered as revisions are being made. New versions of the four diagrams will be available on our website in the coming weeks.

Information gathered at the two workshops is currently being used by the research team to revise the diagrams and report in June 2022. Information gathered will also feed into research on resilience and sustainability in Autumn 2022.

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1. **Focal value chain**

The focal value chain diagram (Figure 2) was discussed in all the small breakout groups in the in-person and online workshops. This diagram is intended to represent the key value chain elements across four stages: production, processing, distribution and marketing, and consumption.

The key elements in the focal value chain were discussed in terms of practices, actors, flows, territorial capital inputs, and economic, socio-cultural, and environmental values and outcomes.

Speyside Malt Whisky from individual distilleries is the focal product (or output).

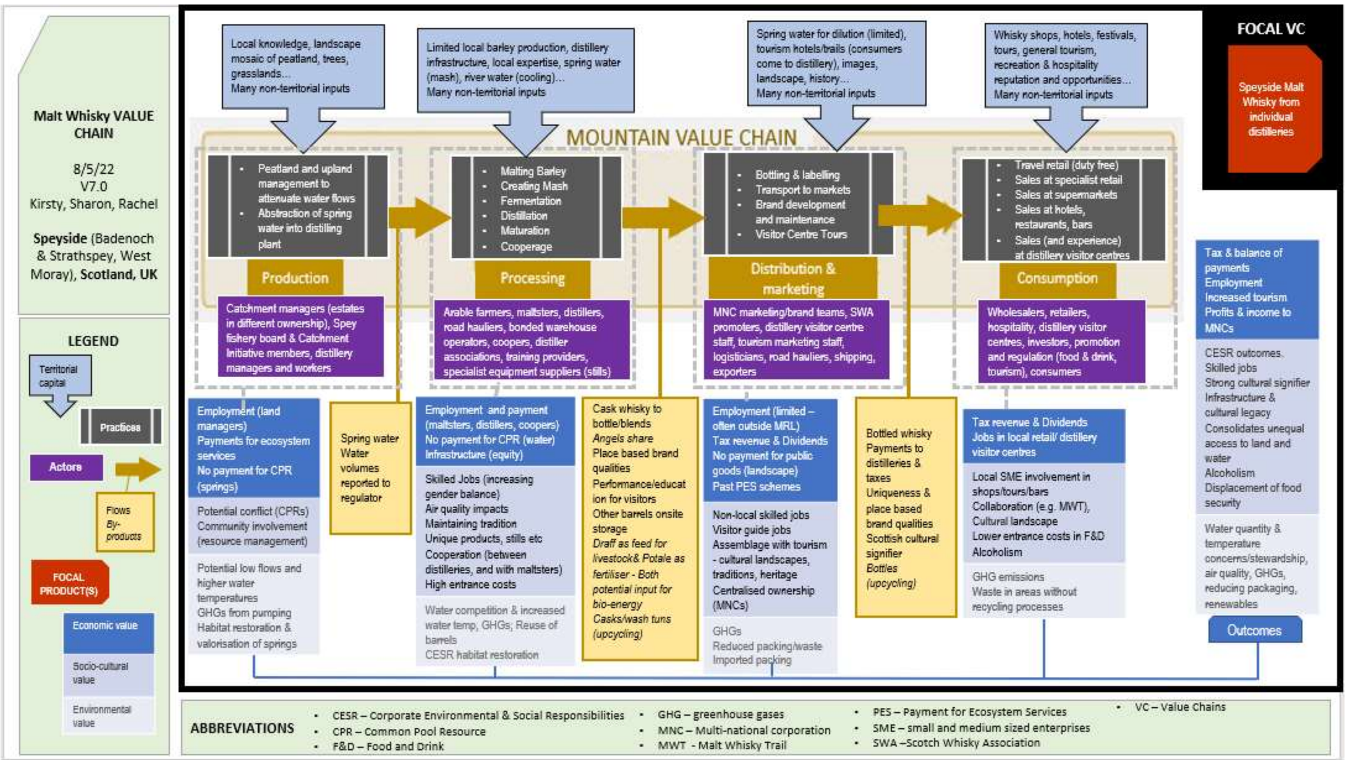

Figure 2: Snapshot of focal value chain diagram presented at workshops

(PDF version also available here)

The main comments and discussions from the workshops are noted below, under the headings representing key elements in the focal value chain diagram. These notes will inform revisions to the diagram and fuller details will be captured in the longer report.

Territorial capital

'Territorial capital' signifies inputs from within the Mountain Reference Landscape (MRL) area (see Figure 4). In the case of Speyside Malt Whisky, the main territorial capital input is water, as other key ingredients (barley, yeast, etc.) are sourced from other areas.

- Highlighting that water is the only production part of the value chain located in the mountain area
- Distilleries close to headwaters important for quality

- Few distilleries buy barley directly – most buy malt (from maltsters) *– barley and malt are both non-territorial inputs in the context of the focal VC (captured in the spatial analysis diagram)*
- How are external flows into the territorial and other capitals feeding into the value chain (e.g., fertiliser for barley)?
- Scotland is unique in high % of barley going into distillation (globally higher % goes into brewing) *– again, barley is a non-territorial input*
- Suggestion that 'ecosystems and enabling environment' (which may appear to the left of production) is missing *– following the conceptual framework, this is part of the territorial capital.*

In summary, discussions surrounding territorial capital confirmed: the main natural resource was water from the catchment, with barley (and other key ingredients such as yeast) coming from outside the MRL area; and the 'production' (capture) of spring water is dependent on the way that the upland ecosystem provides this provisioning service.

Practices

The value chain 'practices' sit within four stages: production of the raw materials used in the value chain; processing to make the product; distribution and marketing of the product; and final practices associated with consumption of the product.

- Production
  - Land use competition (e.g., afforestation) and use of habitats adjacent to water (e.g., deer management, avifauna) – and potential impacts on water quality?
- Processing
  - Distillers open to new concepts and ideas – but long lead time for products.
  - Collaboration – lots in distilling (compared to brewing) e.g., 'spirit swapping' (for blends)
- Distribution and marketing
  - Export market grew through merchants in central belt transporting internationally
  - Impact of centralisation/automation of processes on local workforce (bottling and labelling)
  - Integrity bottling – certain enthusiasts will only buy natural colour products
  - Question whether distillery tours be included in the processing stage? *–These are not part of the process that generates whisky, but are captured within the distribution and marketing stage*
  - There is a core of tour staff in full-time employment (vs seasonal labour, which might be viewed differently). Seasonal high volume visitor numbers met with 'guides' who have been given scripts but represent something different in terms of quality to professional guides
- Consumption
  - No mention of auctions – important means of purchasing for consumption/investment. Prices impacted by collectability, bulk purchasing, and resale.
  - Impact of digital sales – consider how the market for whisky/alcohol distribution is different from other commodities – and how well consumers understand distribution processes/restrictions (e.g., exporting, online purchasing). Online retail is here to stay.
  - Not all whisky consumers are distillery visitors.

In summary, the main practices involved at each stage of the value chain have been included but additional details and examples support fuller understanding of the how the value chain operates.

Actors

'Actors' are the individuals and institutions responsible for implementing practices directly within the value chain. Additional supporting actors are also represented in the conducive enabling environment (Section 3).

- Public/private ownership of land and impacts in terms of land use/management priorities
- Farming families work in distilling – compatibility with shift patterns (enabling generations to stay in area)
- Specialist coopers, equipment suppliers, engineering/IT workers (e.g., running automatic processes) based in distilleries
- Distillery ownership and impact on brands – in and out of 'Scottish hands'
- Whisky no longer only seen as older persons drink (cultural) – represents new markets

In summary, value chain actors include a wide range of individuals and organisations whose approach to implementing practices can have tangible and intangible impacts (e.g., quality of water flowing into processing, attraction of new markets).

Flows and By-products

'Flows' includes materials, information, and finance passing between the practice stages; whereas 'by-products' are flows that leave the value chain to enter another one (externalities leave the value chain but are not re-used).

- Helpful to capture destination/use of by-products. Some debate regarding destination of some by-products – e.g., draff and pot ale previously destined for agricultural, are now also shared with energy generation
- Some of flows/by-products insignificant

In summary, connections between value chains are important in terms of by-products being passed from one to another. There are many of such connections, but we focus particularly on the connections between (or 'assemblage') the Speyside Malt Whisky and food and drink tourism value chains as one example (see Section 4).

Valorisation

- Importance of increased workforce in area as result of whisky distilleries/impact on other sectors – *in some cases additional employment in the area resulting from related activities is captured in terms of assemblage (e.g., food and drink tourism)*
- Investment and reinvestment in the area in old and new distilleries (e.g., local tradespeople)
- Some shift away from a master distiller towards collection of 'makers' (improving gender balance)
- Whisky industry tends to be job for life – represents potential opportunities for young people?
- Air quality issues associated with the angel's share

- Location of employment and impact of multi-national corporation-type jobs in rural areas (e.g., level of wages)
- Differences in type of employment and skill-levels may be better drawn out – e.g., skilled distillery 'jobs for life' (stillmen, coopers, tour guides…) vs related sectors (hospitality) which are usually lower-skilled and have much higher numbers and turnover.
- Importance of sustainability to business models
- Pride associated with working in whisky industry (premium product)
- Impact of global companies' involvement in local areas and community/local families' sense of connection.
- Distilleries have a role and responsibility in communities
- Whisky haulage seen as prestigious employment – upskilling drivers (volatile product)
- Most value is added between Distribution & Marketing and Consumption stages
- Brands impact on price – 30-year-old product from certain big-name distilleries will sell at higher premium; branding is also important in marketing/consumer decision-making (e.g., heritage aspects, new trends – plain/simple labels)
- Whisky investments 'massive' – long term and 'better than gold'
- Profits going abroad
- Work on responsible drinking messages (companies, Scotch Whisky Association) – messaging emphasising quality over quantity.
- Other factors to consider include nutritional/health and moral dimensions (encouraging drinking) – is a whisky-free society a possibility? (Thinking about other societal change: smoking, leaded petrol, coal, sugar tax…) – in this case links with tourism even more significant (heritage perspective)
- Product snobbery – malt vs blend, Scotch vs other whisk(e)y, Speyside vs other regions, age…
- Suggestion that positive and negative valorisation be indicated on the diagram

In summary, discussions added useful detail to existing points and confirmed the economic and socio-cultural importance of distilleries to local area.

<u>General comments on focal value chain diagram</u>

- Quite complex – reflecting the large amount of information being represented
- Distils the complexity of whisky in a smart way/interconnected elements. Also looks to the future. Allows us to get into detail of things like, what is the value of landscape – which is important for visitor and employment experience. Softer issues also picked up.

2. Spatial analysis

The diagram representing how the Speyside Malt Whisky value chain is situated across different spatial scales (Figure 3) was discussed in both small breakout-groups in the in-person workshop and one of the breakout groups in the online workshop.

This diagram is intended to capture geographical dimensions of the elements previously identified in the focal value chain, to consider the extent that value is captured in the mountain reference landscape (MRL) (Speyside, see Figure 4) in particular. This analysis will be particularly helpful to feed into later research considering sustainability and resilience in the case study area, and in considering future opportunities to safeguard and capture benefits locally.

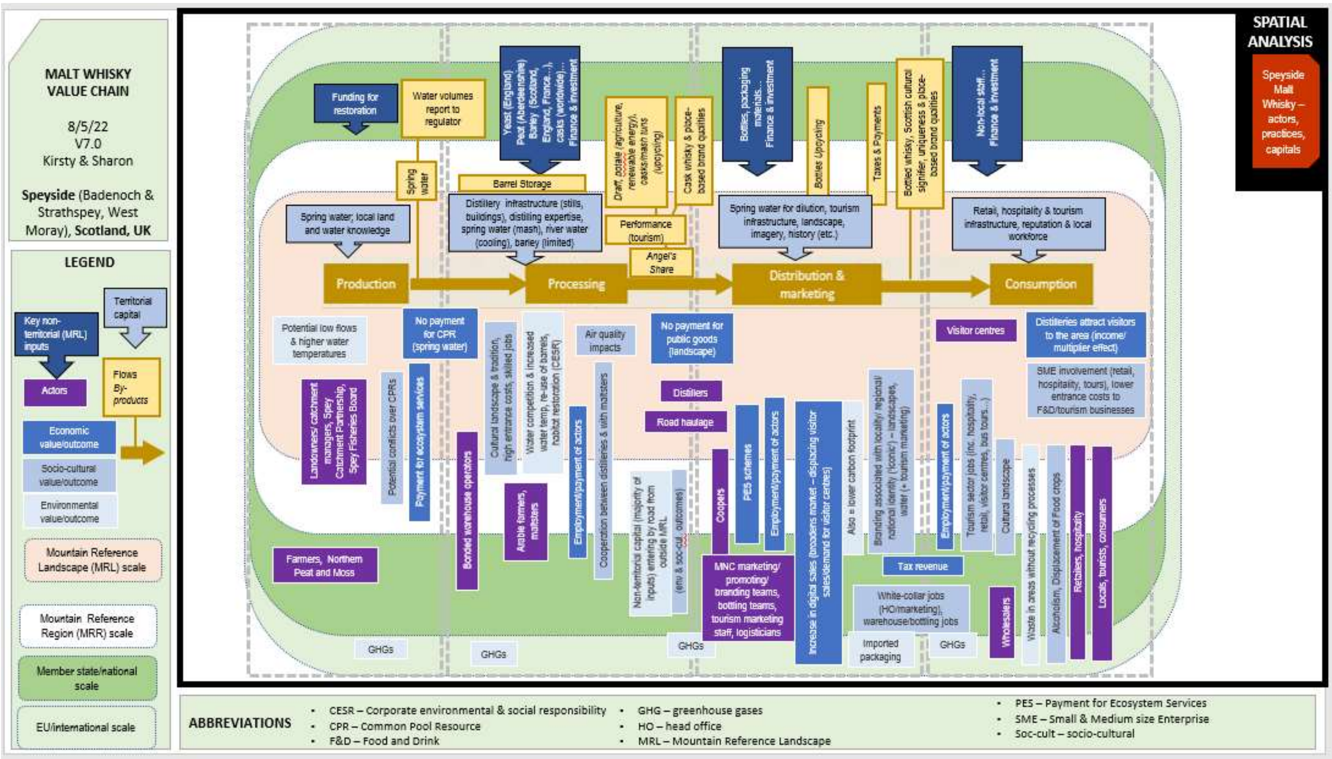

Figure 3: Snapshot of spatial analysis diagram presented at workshops

(PDF version also available here)

The main comments and discussions from the workshops are noted below. These notes will inform revisions to the diagram and fuller details will be captured in the longer report.

- Distilleries not *in* mountains – but part of distilling identity (significance of where whisky is bottled?) – *the location of distilleries is often mountain areas (as opposed to mountain tops), such as Speyside, due to proximity to water source.*
- Distillery location historically based on communities turning perishable product (barley) into non-perishable product.
- Making it here because they have to...
- Discussion of value/specialness, including distillery-only bottling on-site (links with tourism)
- Discussion re peat in the context of wider policy agenda, but also in terms of importance in this particular locality (topic more significant in other whisky areas)

- Barrel storage should extend across scales (often stored off site/out of the area) – wood policy and barrel purchase also important to processing practices to make whisky.
- Younger distilleries without heritage more likely to emphasise (Scottish) barley provenance
- Query re use of spring water for dilution at distribution and marketing stage (often in other regions). Use of demineralised mains water (important in terms of affecting flavour)
- Can we quantify the proportion of whisky being matured inside and outside of the region (mostly in central belt)? – *place for this type of detail in the report*
- Impacts of global markets – including investments, exports, marketing.
- Not a huge amount of whisky consumed in the area.
- Food and Drink Ambassadors (VisitScotland) – also thinking about the area/assembling and marketing a product (Speyside, Highland, Cairngorm, Moray, Grampian) – *links to assemblage and conducive enabling setting discussions*

General comments on the spatial analysis diagram

- Might be helpful to include sense of proportions situated in different scales – *this type of detail is represented in the report*
- Suggestion to map supporting institutions spatially

In summary, the location of distilleries in mountains is often historically and physically dictated, which has resulted in narratives of specialness and authenticity in terms of associating processing practices in place. However, other components of the Speyside Malt Whisky value chain are located outside of the region – across national and international scales, therefore consideration of where valorisation and outcomes take place is important in terms of which actors benefit.

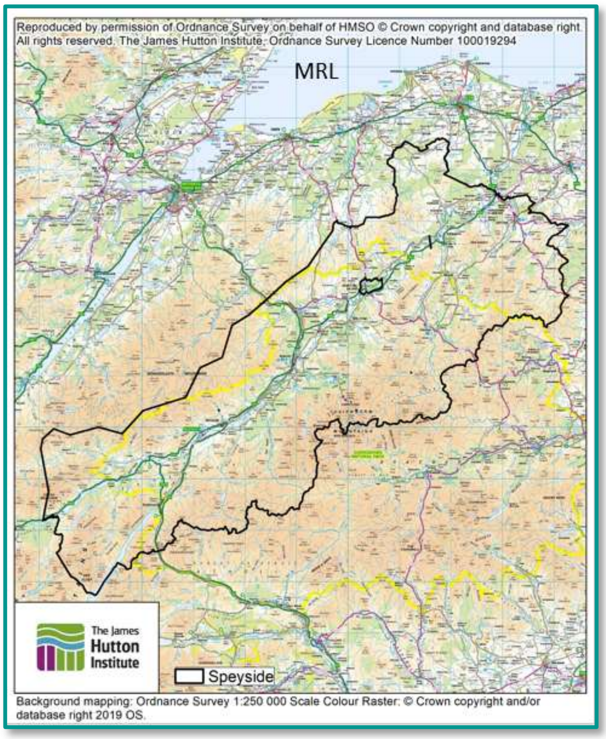

Figure 4: Area referred to as the Mountain Reference Landscape (MRL) in MOVING

3. Conducive enabling setting

A third diagram representing the 'conducive enabling setting' (Figure 5) was discussed by one of the small breakout-groups in each of the in-person and online workshops. This diagram is intended to capture the complex picture of structures that sit outside of the focal value chain itself, but support and enable, or form barriers that curb opportunities, for the value chain being studied.

Regional infrastructure and governance institutions formed the basis of discussions surrounding the conducive enabling setting, in addition to understanding the overall characteristics of the market and governance at each practice stage.

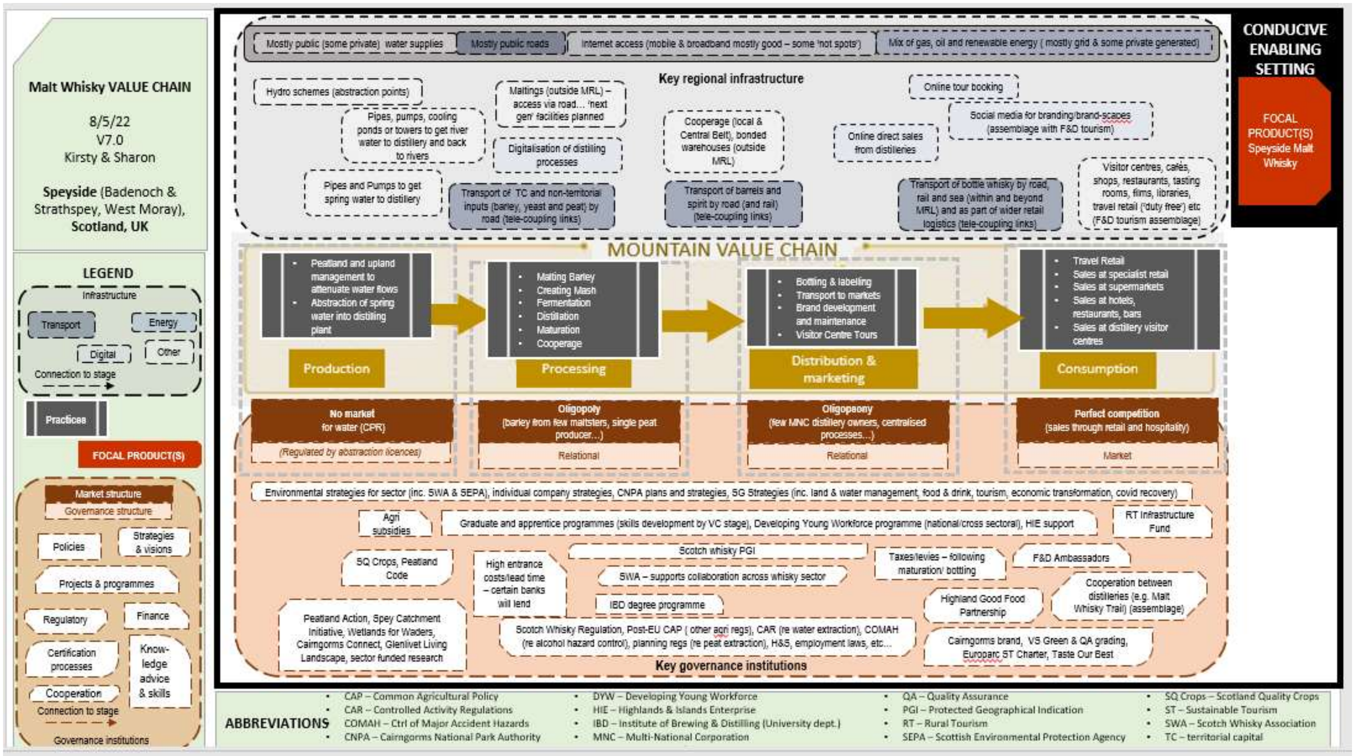

Figure 5: Snapshot of conducive enabling setting diagram presented at workshops

(PDF version also available here)

The main comments and discussions from the workshops are noted below, under the headings representing key elements in the conducive enabling setting diagram. These notes will inform revisions to the diagram and fuller details will be captured in the longer report.

<u>Key regional infrastructure</u>

- Transport
  - Transport important, inc. alternatives to traditional road haulage (vast majority of transport by road)
  - Decarbonisation = key issue
  - Road upgrading (A9) still an issue – including haulage and whisky tourism
  - Opportunities for rail haulage – past trials (cross-regional supporting infrastructure) – 'Lifting the Spirit' (rail freight) trial but nothing came of it.

    - Use of empty HGVs on return (e.g., supermarkets), night haulage…
    - Difficulty in finding about transport options between distilleries, issues with sustainable travel (e.g., ample space for bikes on Highland mainline trains) – is demand-responsive transport an option, for staff and visitors?
- Energy
    - Direct linkages to sector through use of by-products
    - Correction to be made to distinguish between distillery water infrastructure (which is part of the focal diagram – as it is part of territorial capital) and the potential conflict for water between whisky and other water users and the variety of large and small hydro schemes using the same water.
- Digital
    - Internet connectivity very important for distillery business model (not seen as an issue)
    - Impact on rural workforce (including ability to live in, or outside of, the distillery area) – links into big questions *'do you need to live here to work here?'* and *'should staff live here* (if territory is important)'?
- Other
    - Housing
        - Youth/employment angle – availability of key infrastructure and landscape qualities help to attract talent to the area and enable them to live a meaningful life.
        - Provision – companies and/or local authorities (also Rural Housing Scotland)
        - Housing = issue for labour. Airbnb making this worse.
    - Community action planning (National Park area) – key themes inc. environmental sustainability, energy, housing, land – projects include community food growing (including on distillery sites?)

Key governance institutions

- Cooperation
    - Institutions to be added: unions, trade bodies, community networks – *identified as actors in discussions of the focal diagram but are also enabling institutions*
    - Informal dialogue/collaboration to address sustainability actions? Lots of collaboration in national park. Importance of the role of Cairngorms Business Partnership (local chambers of commerce)
- Knowledge advice & skills
    - Institutions to be added: SWRI, Hutton Barley Hub
    - Heriot Watt is world-renowned in terms of training distillers (degree programme)
    - Many research projects from multiple organisations going on relevant to whisky
- Regulatory
    - Strong regulation of Scotch Whisky important in international success of product.
    - Highly regulated sector – compliance is a key priority.
    - Authenticity (in terms of protecting Scotch Whisky) – impact on quality and product value based on location?

- Strategies & visions
    - Sustainability ambitions important
- Policies
    - Whisky will need to justify itself within the land use change policy agenda focussed on food production, climate change, and biodiversity.
    - Diversity, inclusion, flexibility all becoming more important (re employment)
- Projects & programmes
    - Scottish Government climate hubs – 15 to be introduced across Scotland (community level) – based on climate resilience, food & drink, circular economy etc. Impact on/opportunity for certain communities.

Market and governance structures

- Production
    - There is not a market for water, but this could change in the future. Scarcity has increased in recent years. Other countries experience competition for water leading to market solutions.
    - Some distilleries use private water supplies – owned or informal agreements reached with landowner.
    - Water – it does not operate as a traditional market… Catchment in property deeds – effectively purchasing water.
- Distribution & Marketing
    - Market structure is not an oligopsony due to number of distilleries

Overall, the workshops highlighted some additional enabling infrastructure (particularly housing); some additional institutions; and confirmed the importance of regulations and sustainability strategies that help with the valorisation of the product. There was more debate about how to label and characterise the market and governance structures.

Figure 6: VisitScotland signage for the Malt Whisky Trail (photo credit, Sharon Flanigan)

4. Tourism assemblage

The final diagram, illustrating links between the focal value chain (Speyside Malt Whisky) and an additional related value chain in the area (food and drink tourism) (Figure 7), was discussed by one of the breakout-groups in each of the in-person and online workshops. This diagram acknowledges that individual value chains do not operate independently of other products and markets, that territorial capital might be shared, and that significant flows/by-products may move between chains.

In the case of Speyside Malt Whisky and food and drink tourism, mutually supportive links exist between the two, whereby the product itself (whisky) represents a by-product flowing into the tourism value chain as key territorial capital underpinning visitor experiences. Each value chain builds strongly on imagery representing the territory in the context of marketing and promotion, and each supports the other's efforts in generating value through experience.

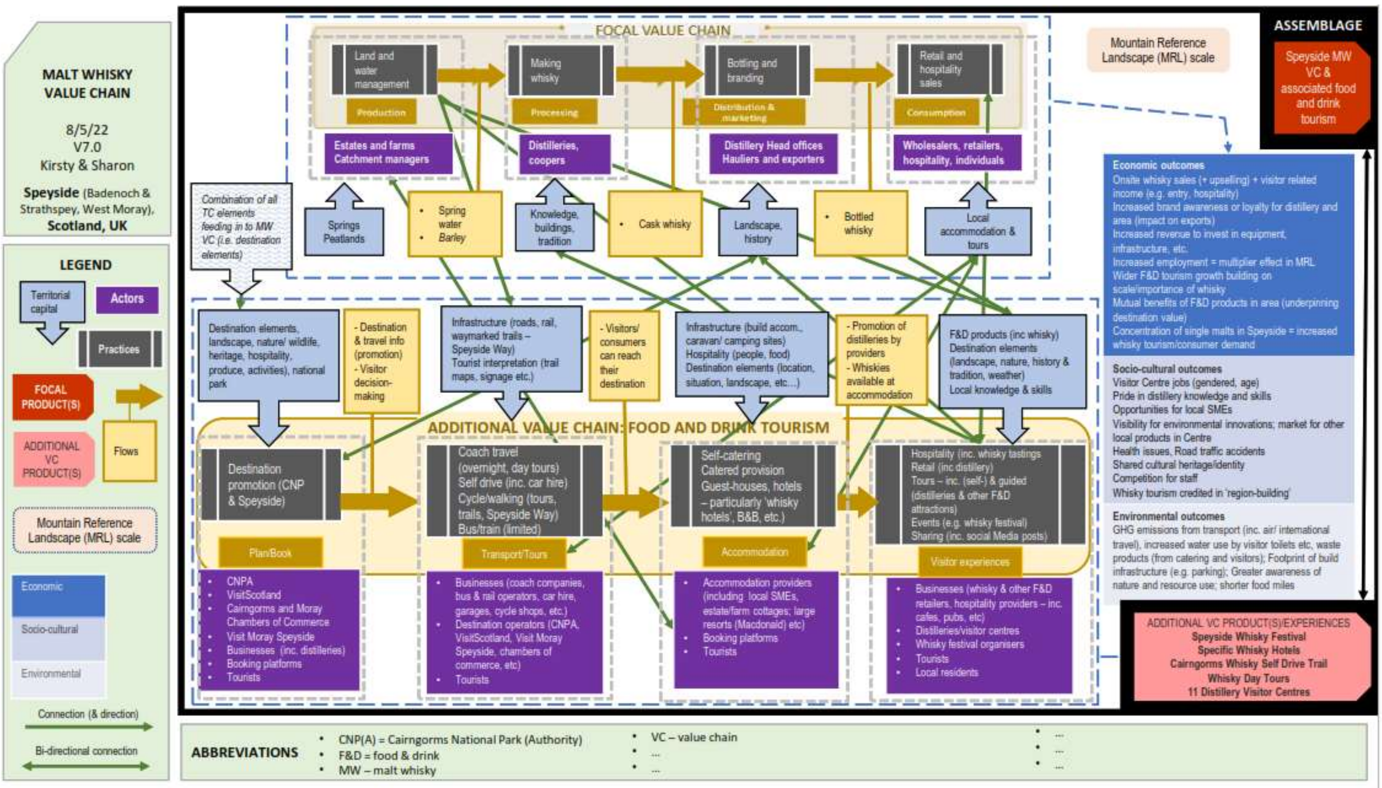

Figure 7: Snapshot of the malt whisky and tourism assemblage diagram presented at workshops

(PDF version also available here)

The main feedback from the workshops for revising the tourism assemblage diagram includes comments in the following areas. The full details will be captured in the longer report:

Plan/book

- Actors to be added: Cairngorm Business Partnership (CBP), Visit Cairngorms, Visit Aberdeenshire (outside MRL but may promote the whisky trail across to Speyside) – and consider Aberdeenshire Accents (cycling tours)
- Strong support from tourism contacts in the Cairngorms National Park Authority

Transport/Tours

- Difficulty in finding about transport options between distilleries, issues with sustainable travel (e.g., space for bikes on Highland mainline trains) – is demand-responsive transport an option, for staff and visitors?
- Campervans – missed opportunity? How do they fit in? Large growth – but issues surrounding layby parking (waste etc) and in relation to alcohol consumption. Are there opportunities for campervan sites on distillery land?
- Environmental outcomes associated with use of road infrastructure instead of more sustainable options
- Impact on visitor experience associated with upgrading road infrastructure

Accommodation/visitor experiences

- Local food
    - Importance of local food strategies and definitions of what is considered 'local' food and drink
    - Linking in with other local produce (deer, salmon) – looking at the stories of the area, connecting produce through land/water (Spey) – the 'Cairngorms Diet'?
    - Perceptions of many of our local products as 'luxury' and accessibility impacted by export markets (inc. shellfish, salmon, whisky) – impact on value
    - Food and Drink Ambassadors (VisitScotland)
- Destination
    - Connections to other tourism products/overall destination experiences… potential dark skies initiative, Tomintoul; illicit stills smugglers trail, inc. Glenlivet; golf and castle trails… connecting with different 'stories'.
    - History and cultural heritage (territorial capital inputs)
    - Literature and film connections – connecting to the landscape – areas that make whisky could be linked in – also connecting to Visit Scotland 'year of stories' 2022 (and other 'year of…' themes) – Hutton have mapped sites.
    - Local visitor centres (associated with attractions) replacing Tourist Information Centres – issues relating to volunteer labour/demographics; also impacts from internet replacing this type of visitor service
    - Connections between whisky-tourism-farming (agritourism) missing? Increasing visitor trend – *associated assemblage*
- Pricing
    - Debate re whether distilleries should or should not charge a premium to buy on-site (cheaper to buy same thing in supermarkets – so some do), but conversely, buying a bottle is part of experience/comes with 'bragging rights' (and wealthy visitors are prepared to pay) so distilleries tap into such market dynamics.
- Whisky tourism
    - 'Experiences' (e.g., Johnnie Walker) and specialness (e.g., distillery-only bottles) brings in visitors

    - Differences in distillery ‘packages’ depending on scale and scope of operations – including tours, shops, cafes, etc
    - Visitor demographics – includes local enthusiasts and tourism visitors – more visitors than locals. Scotch is an important draw to the country and whisky producing (including but not limited to Speyside areas).
    - Visitor types (spectrum?) – includes those with keen interest in whisky (high added value products) right through to those with no real interest except perceived significance in context of a trip to Scotland

<u>Outcomes</u>

- Sustainability credentials – distilleries among the greenest places visited (lots being done, zero waste, etc.)
- Employment in visitor-fronting services – struggles re wages, seasonal labour, housing
- In context of sustainability – thinking about the affordability of eating local – and ensuring accessibility of F&D tourism which tends to focus on those with higher economic status.

<u>General comments on tourism assemblage diagram</u>

- Should visitor experiences be included in the focal VC section of this diagram – or connected through arrows?
- Again, diagram is complex (is there a way of further simplifying?)
- Should/could the F&D tourism VC be aligned with the VisitScotland ‘customer journey’? (See, Think, Plan, Do, Review). Process is circular – review connects back to first stages (e.g. Trip Advisor)

In summary, different elements of consumption are a key focus in the tourism assemblage including hospitality, transport, and other experiential components in the destination area. Tourism value chains are different from agri-food value chains, including that they are less linear and part of interconnected web of products at the destination level, which might be better reflected in the diagram.

5. Additional notes to feed into future discussions

- Concerns about storage of barrels (traditional warehouses) and impacts of humidity in the context of climate change – feed into later work package discussions (sustainability and resilience)
- Implementation of/potential for new innovations – e.g., carbon positive whisky (impact of time lag)
- Water scarcity has increased in recent years; increasing competition for water and knock-on impacts for water quality– could become a consideration for an industry so dependent on water.
- Impact of/on global markets (e.g., Ukraine conflict, climate change, energy costs)
- Impact of Brexit (e.g., labour, regulations – e.g., water)
- Lower visitor numbers due to issues with filling seasonal jobs (Brexit-related) and lower capacity/scale due to social distancing (fears following Covid)

6. MOVING workshop feedback

We asked the participants for their feedback on the workshop aspects such as the logistics, facilitation and usefulness. For the in-person workshop feedback was gathered through hard copy questionnaire, and for the online workshop feedback was given through online survey (using Qualtrics). This feedback was gathered anonymously and by ten of the fifteen participants.

Overall, feedback was positive with participants having learnt more about our Value Chain and our work within MOVING. There were also some suggested improvements which we will try to action for our next set of workshops.

The provision of pre-workshop information, venue, online tools and facilitation was generally rated 'Good' or 'Very Good' by almost all participants. Similarly, the content and quality of the groupwork and presentations were also considered 'Good' or 'Very Good' by almost all participants.

We have noted the suggested improvements of clearer font on the presentation diagrams and for a little more information to be given beforehand (for the in-person workshop) so that participants know exactly what to expect at the workshop.

We value all this feedback and appreciate participants taking the time to share their views.

Finally, as part of the workshops, participants were asked to position themselves on two axes to represent their view on the Speyside Malt Whisky value chain in terms of sustainability (x axis) and contribution to local rural development (y axis). The results illustrated in Figure 8 show a positive inclination in terms of both aspects, though participants were not in total agreement. These elements will be explored in more detail in the context of future work.

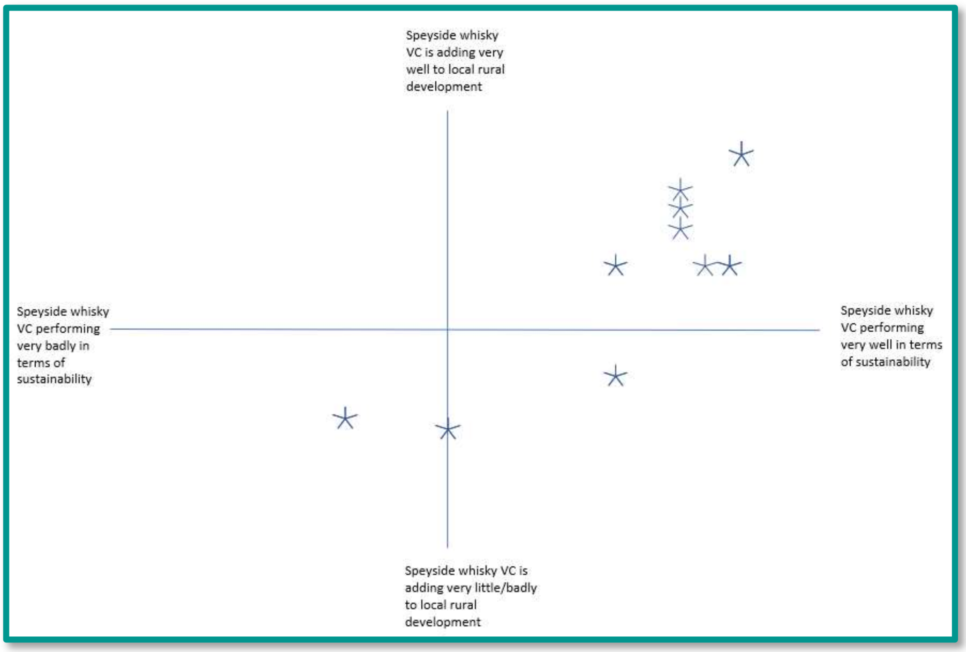

Figure 8: Graphical representation of how participants view the Speyside Whisky value chain (VC)

7. Next steps

- The notes in this report will be integrated to final document on the performance of the value change and will be used to reflect on and make changes to the four diagrams discussed in these workshops.
- New versions of the four diagrams will be available in the coming weeks on our project webpage.
- During the summer months the Hutton team will be responsible for analysis of the 23 case study reports provided by partners from across Europe. Summary reports of key findings will be available in due course.
- Further workshops focussing on sustainability and resilience of the Speyside Malt Whisky value chain will be conducted in the autumn.

Thanks

We would like to thank everyone again for their involvement in the MOVING project to date, including participation in the workshops, interviews, and all other engagement towards understanding the Speyside Malt Whisky value chain and its component parts.

We hope you will continue to engage with the project and look forward to collaborating again through future events and other opportunities for interaction.

In person workshop, Boat of Garten 11th May 2022

Online workshop, 24th May 2022

Contacts

Should you wish to contact the team at any time we would be happy to hear from you.

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