



# BRUICHLADDICH

DISTILLERY COMPANY LIMITED

## Whisky Killer Facts

### Raw Materials

#### Flavour Compounds Identified

In Single Malt: 80+

In Cheese: 7

**60% of the flavour compounds of a new spirit are created at fermentation.**

#### Annual Industry Barley usage

2004: 850, 000 tonnes

**Bruichladdich uses 1,200 tonnes of barley**

#### Main Barley Varieties

Optic - main

Chalice - niche

Golden promise –niche

**Bruichladdich uses more Optic than Chalice barley**

#### Industry Average Alcohol Yields

1990 = 391 OLA per tonne barley

1993 = 408 OLA

2000 = 413 OLA

**Bruichladdich averages 402 OLA per tonne barley**

#### Wort

Vitamin C: Nil

**18th Century Royal Navy believed *Wort* was a Scurvy cure**

#### Malting

steeping: 40 - 60 hours - twice under water, twice dried out.

enzymes convert starch to sugars, kilning stops this (dehydration: 40% to 2%) but

**Enzymes reactivated by rehydration in mashtun**

#### Enzymes

Cytase breaks down starch cells

Diastase works on starch to sugar

**Diastase (two enzymes) Amylase: starch to dextrine & Dextrinase: dextrine to sugar**

Water

**For 1 OLA Bruichladdich New Spirit**

13 litres of water

2.5kg of barley

**1 bottle of Bruichladdich 10 was distilled from 4.5 litres water & .8kg barley**

## Production

Single Malt Volumes

1961 – 69m LPA

2004 – 151m LPA

**Production destined for Single Malt has doubled in 40 years**

Illegal Stills - Speyside

1823 = 14,000

1832 = 692

Malt Distilleries in Production

1881 = 160 distilleries (100 million litres)

1981 = 113 distilleries

2005 = 90 distilleries (700 millions litres)

**There are almost half as many distilleries today than 1881 - producing 7 times the volume.**

Single Malt for Blends

Total Single Malt production 2005 = 700 m OLA

Single Malt for Blending = 549 m OLA

Single Malt for bottling = 151 m OLA

**Only a fifth is retained for Single Malt. 100% of Bruichladdich is retained for Single Malt sales – none for blending.**

Blended Whisky Cost Comparison

150% Cheaper labour

50% Cheaper than Barley)

30% less fuel

**Grain whisky is 40% cheaper to make than Malt whisky**

Single Malt Production 2003:

146m OLAs

**18.5m barrels of whisky maturing in Scotland**

## Whisky Stocks

7.5 years times total sales

**3 billion litres of alcohol in Scottish Warehouses**

## Industry Production:

Average distillery production = 2.5 m OLAs  
BDCL = 0.47m OLAs

**BDCL produces only a fifth of the average distillery**

## Number of Distilleries

Highland 27  
Speyside 44  
Islay 8  
Island 5  
Lowland 3  
Cambeltown 3  
Total: 90

**50% of all distilleries are located in Speyside (44)**

## Coopers in Scotland

1980 = 1017  
2004 = 225 (7 apprentices)

**Bruichladdich has 2 coopers and one apprentice**

## Sales

### 2004 All Whisky Sales

Export - 267m LPA (68m cases)  
UK - 32m LPA (8 m cases)  
Total: 306m LPA (78 m cases)

**10% of all whisky sold is now Single Malt**

### Worldwide Single Malt Sales

1975 = 2.1m LPA = 0.5m cases  
1990 = 10.6m LPA  
2003 = 17.4m LPA  
2004 = 19m LPA = 4.8m cases

**10 fold growth in 30 years**

### UK Single Malt Sales Value

2004 = £120M  
Growth: 10%

**UK Single Malt sales are half that of Gin. Quarter of Vodka**

#### UK Single Malt Sales Volume

1980 = 0.95 m LPA (240,000 cases)  
2004 = 3.07m LPA (800,000 cases)

**UK Single Malt Sales has trebled in 24 years**

## UK Consumption

#### UK Single Malt Consumption.

1984 1 in 40 bottles of all Whisky  
2004 1 in 10 bottles of all Whisky

**The consumer is trading up: 2.6% to 10.5% of all whisky**

#### UK Blended Whisky Consumption

1980 = 49 m LPA  
2004 = 29 m LPA (7.4m cases)

**Blends fell by half in 25 years**

## Export Consumption

#### 2004 Single Malt Volume

15.58 m LPA (4m cases)  
Growth +12%

**5 times as much single malt is exported**

#### 2004 US Single Malt Volume

3.8 m LPA  
Growth +32%

**The same amount of Single Malt is exported to the US as consumed in UK**

#### Export Single Malt Consumption

1984 - 1 in 50 bottles All Scotch Whisky  
2004 - 1 in 17 bottles All Scotch Whisky

**Increased by factor of 3 in 20 years**

## Tax

### UK Excise Duty

2005 = £19.56 /lpa  
£6.29 per 70 cl bottle @46%

**UK alcohol tax is the third highest in European Union**

### Taxes on UK sales of Single Malt

£62m in Excise Duty and about £38m in VAT

**£100m to the Exchequer**

### 2004 Industry Figures

Diageo	Pre Tax Profit: £2.0bn
Pernod Ricard:	Pre Tax Profit: £0.6bn
Allied:	Pre Tax Profit: £0.5bn

**Diageo makes twice as much profit as Allied and Pernod Ricard combined**

LPA = Litres Pure Alcohol. OLA = Original Litres of Alcohol. Whisky = Scotch Whisky