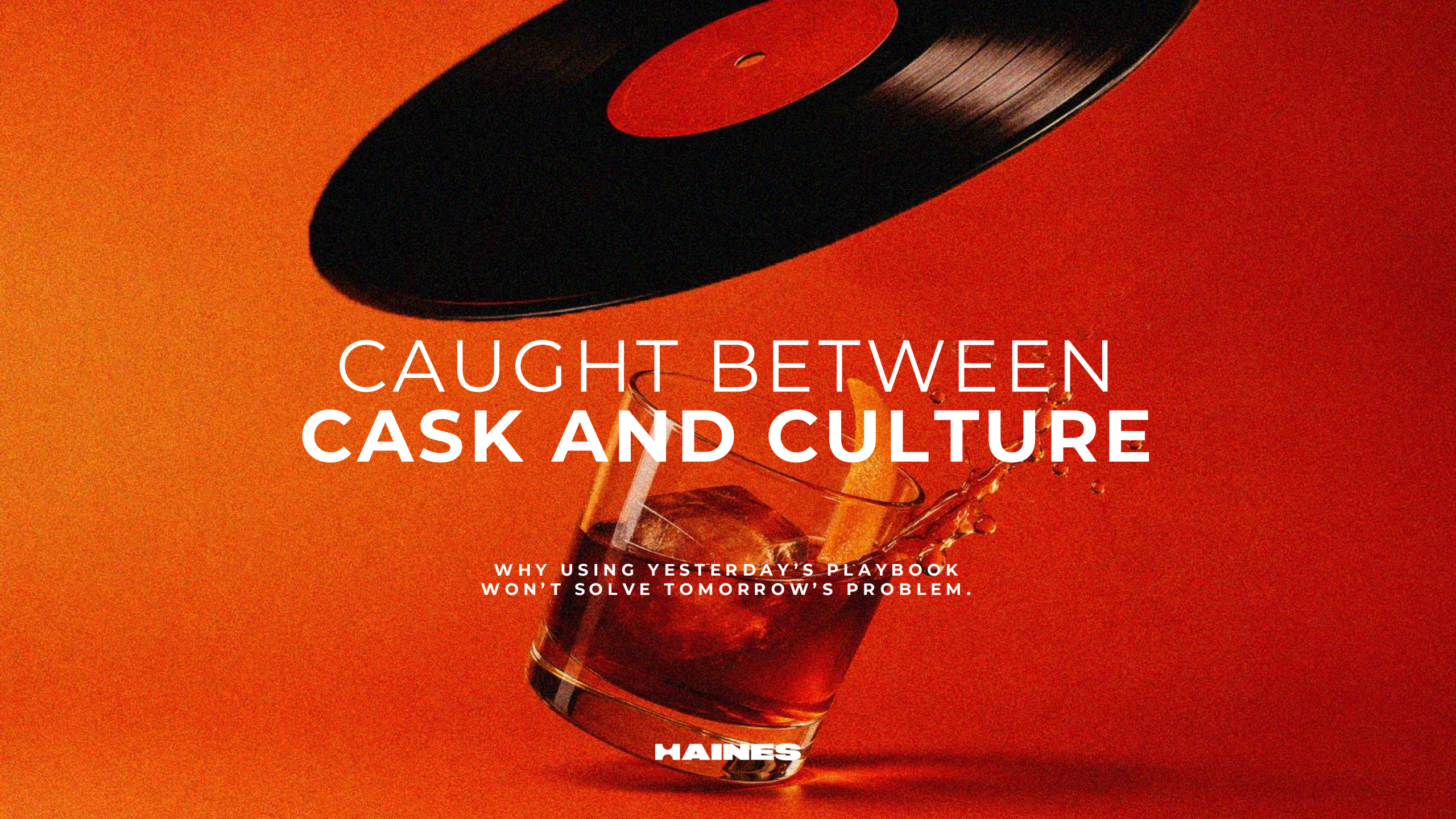


The background is a solid, vibrant red. In the upper half, a black vinyl record with a red center label is tilted diagonally. In the lower half, a clear glass filled with amber liquid, ice, and a citrus wedge is shown with liquid splashing out. The text is centered in the middle of the image.

CAUGHT BETWEEN CASK AND CULTURE

WHY USING YESTERDAY'S PLAYBOOK
WON'T SOLVE TOMORROW'S PROBLEM.

HAINES



Today, everyone sees the same signals within the Scotch category:

Growth is flattening
in key markets.

Stock is piling up.

A new generation
of drinkers **is drifting**
elsewhere.



Source: Financial Times | NielsenIQ via jefferies

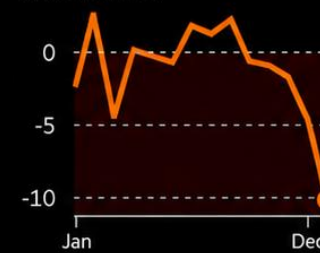
US spirits sales declines are accelerating for most brands

Weekly year-on-year sales growth in 2025 (4-week average, %)

Negative growth

Filter by spirit: Scotch

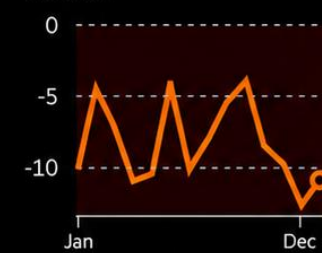
Johnnie Walker



Buchanan's



Glenlivet



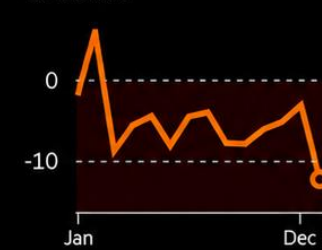
Dewar's



Macallan



Glenfiddich



Chivas Regal



Glenmorangie



Famous Grouse





The industry doesn't lack insight or consumer data. And it isn't short of examples of brands successfully navigating these shifts.

You probably already have opportunity spaces designed to respond. Your pipeline might even be full of products that promise to remove the barriers of entry, drive relevance, target new occasions.

SO, WHY ISN'T EVERYONE MOVING FORWARD?

WHY IS CHANGE STILL THE EXCEPTION?

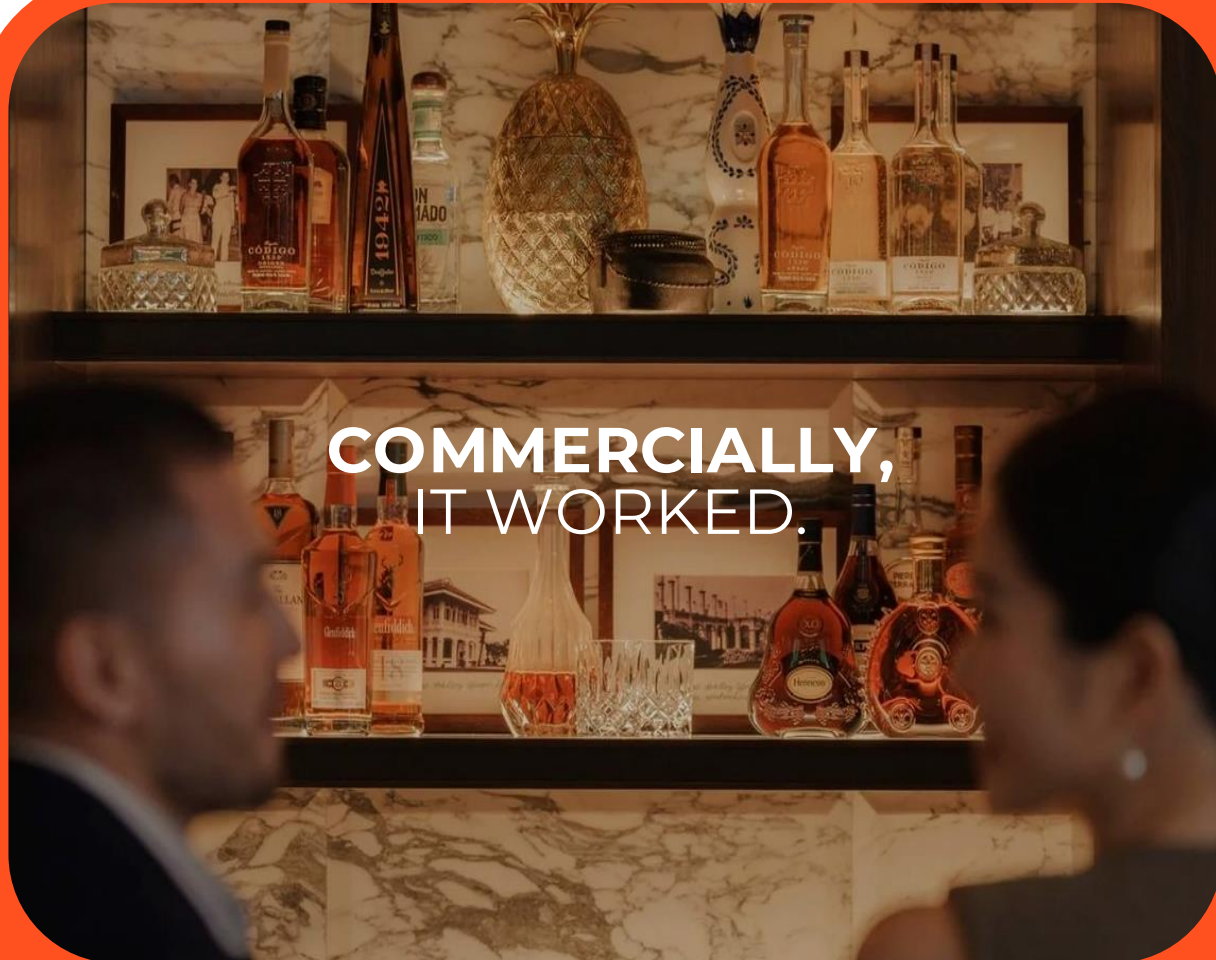
CAUGHT BETWEEN CASK AND CULTURE



HAINES | CPG SPECIALISTS



FOR DECADES, SCOTCH BRANDS PERFECTED A MODEL OF WORTH:
AGE IT LONGER, RELEASE FEWER, PRICE IT HIGHER.





Over time, it shaped how organisations were built.

What started as a winning growth strategy, became an organisational model.

Production, finance, innovation and brand teams all optimised around protecting scarcity, prestige and long-term value.



In the world of 'status spirits', Scotch leads by value share at

38%

Source: Edinburgh Whisky Academy, 2025





AND THE PROBLEM **ISN'T THAT PEOPLE DON'T DRINK WHISKY ANYMORE.**

THEY DO. MORE THAN EVER.

Whisky volumes growth H1 2025

+2% ▲

IRISH WHISKY

+7% ▲

INDIAN WHISKY

compared to the same period the year before.

Source: IWSR, 2025

THEY'RE JUST NOT CHOOSING SCOTCH.

Global Scotch Sales 2025

-3% ▼

SCOTCH

3rd consecutive year of decline

Source: The Guardian, 2025



Instead, they are choosing to engage more often in **sub-categories built for both participation and aspiration.**



BOURBON SHOWS UP IN CULTURE

Cocktails, music scenes,
everyday rituals.



IRISH WHISKEY REMOVES FRICTION

Easier, social, approachable.



WORLD WHISKIES EXPERIMENT FREELY

Curiosity driven, free from rules.



But brands don't achieve this by simply launching liquids aged in trendy barrel finishes.

Because brands winning cultural relevance today aren't just launching products, **they're building single-minded platforms.**

Creating new occasions, experiences, formats. Opening up communities & conversations.

CAUGHT BETWEEN CASK AND CULTURE





WE'RE ALSO SEEING THIS IN SCOTCH



Monkey Shoulder reframed Scotch as a mixing whisky: social, versatile, un-precious.

**MONKEY
SHOULDER**



Glenmorangie turned whisky into a creative playground: imaginative and culturally alive rather than rule-bound.

GLENMORANGIE
SINGLE MALT SCOTCH WHISKY



Bruichladdich dragged whisky into the modern era through radical transparency and sustainability, while still delighting with heritage and theatre.

**BRUICHLADDICH
DISTILLERY
COMPANY**



Laphroaig leveraged everything that makes whisky divisive, and reframed it as something to explore.

LAPHROAIG®



These brands didn't succeed in driving consumer relevance because they had better insights.

They succeeded because they were willing to make the organisational shifts needed to act on it.

THE REALITY IS THAT CULTURE MOVES FASTER THAN LEGACY SYSTEMS.

IT ASKS

**INNOVATION
TEAMS TO THINK
PLATFORMS OVER
PRODUCTS (BEYOND
LIQUID, CASK AND
BOTTLE).**

IT ASKS

**BRAND TEAMS
TO MOVE FASTER
THAN AGEING
CYCLES.**

IT ASKS

**FINANCE TO NOT
ONLY VALUE
MARGIN, BUT ALSO
FREQUENCY.**

IT ASKS

**LEGAL AND
GOVERNANCE
TEAMS TO BECOME
ENABLERS, NOT
GATEKEEPERS.**

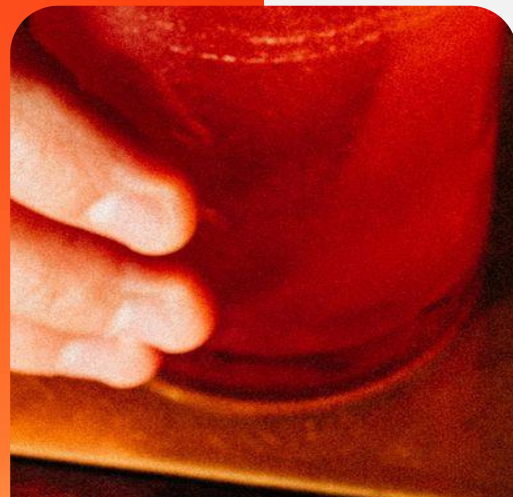
IT ASKS

**PORTFOLIOS TO
MEANINGFULLY
FLEX WITHOUT
ABANDONING
AUTHENTICITY.**



We often look to
consumers for answers.

But the biggest
barrier to growth is
much closer to
home, within the
organisation itself.



This is why, even when brands understand where consumers are heading, **innovation too often refreshes the portfolio instead of reshaping the role Scotch plays in people's lives.**

These are some of the biggest tensions we see our clients facing today.



The real question isn't how to
make **Scotch** more relevant.

It's about who will evolve
the systems behind the
brand without losing what
made it iconic.

CAUGHT BETWEEN CASK AND CULTURE





THANK YOU

A PRACTICAL NEXT STEP

If this resonates, the most useful thing we can do isn't presenting more slides.

It's to apply this thinking directly to your business.

We'll run a short, focused session to:

- 1** Diagnose where your current portfolio is creating friction vs. solving needs.
- 2** Map where a functional platform, not just product, could unlock growth.
- 3** Pressure test whether your current innovation pipeline is adding value or creating noise.



**1 HOUR
SESSION**



ONLINE



**FREE OF
CHARGE**

If you'd like to book in a session with our team, please get in touch:

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