

Case Study | Alcohol | William Grant & Sons

William Grant's malts over-index in Frankfurt and Paris. In Istanbul, they had less than half their European space.

A Shelftrak audit benchmarked Glenfiddich and The Balvenie in Istanbul's main departures store against total Europe and five other hubs. It found a competitor over-indexing on the same fixture, identifying a clear target for space equalisation.



CLIENT	CATEGORY	SCOPE	DATA
WILLIAM GRANT & SONS	SINGLE MALTS	ISTANBUL DEPARTURES V 5 EUROPEAN HUBS	SHELFTRAK AUDIT, AUG 2024

THE BRIEF

Benchmark one store against Europe, then find out who has the space instead.

William Grant & Sons wanted to know how its Whisk(e)y portfolio was performing at Istanbul Airport, using total Europe as the benchmark. That meant measuring share of space at three levels — total alcohol, total Whisk(e)y and Single Malts — and then benchmarking Glenfiddich and The Balvenie against The Macallan, The Glenlivet and Laphroaig on the fixture itself.

Shelftrak compared Istanbul with Heathrow, Frankfurt, Amsterdam and Paris. Whisk(e)y as a whole was close to the European norm. Single Malts were not.

WHAT THE AUDIT FOUND

43%

below the European average
share of total alcohol space
for William Grant in Istanbul

17%

below the European average
share of Whisk(e)y given to
Single Malts in Istanbul

61%

below the European average
share of Single Malt space for
William Grant in Istanbul

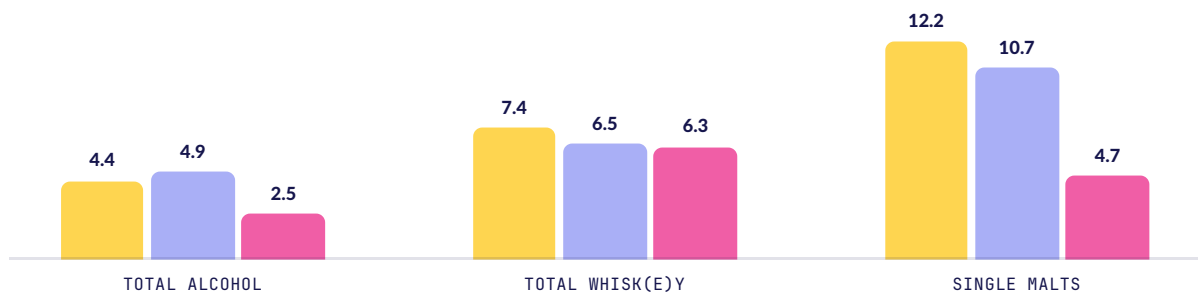
FINDING 01

Whisk(e)y is nearly fine. Single Malts are not.

William Grant's share of total Whisk(e)y in Istanbul is only slightly behind Europe. Its share of Single Malts is 61% behind Europe and 56% behind the UK – and total alcohol share is down 43%. The loss is concentrated in one segment, which makes it addressable.

William Grant share of linear space (%)

■ Total Europe ■ Total UK ■ Total Istanbul

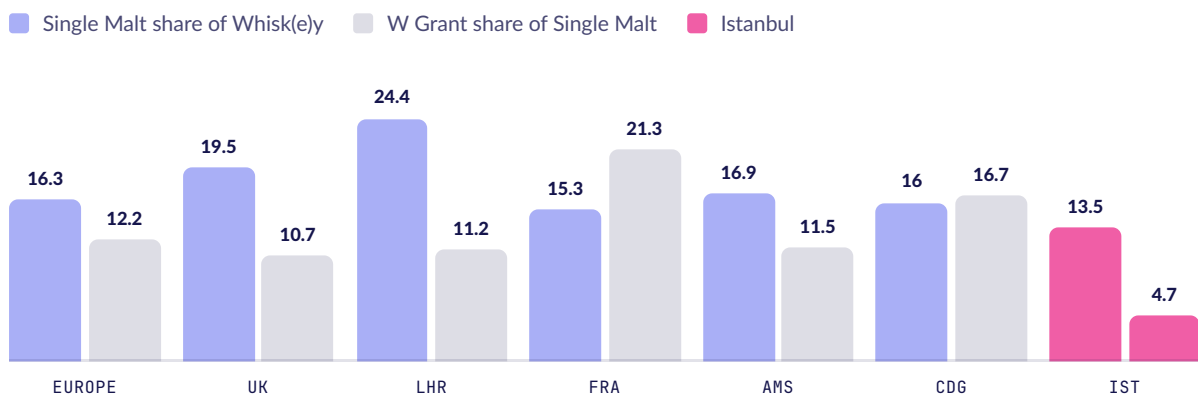


FINDING 02

Every other hub gives William Grant more of the Single Malt fixture.

Frankfurt and Paris show the portfolio over-indexing, with a fifth or more of the Single Malt space. Istanbul gives Single Malts a smaller slice of Whisk(e)y than anywhere else audited, and gives William Grant the smallest slice of that.

Share of linear space by hub (%)

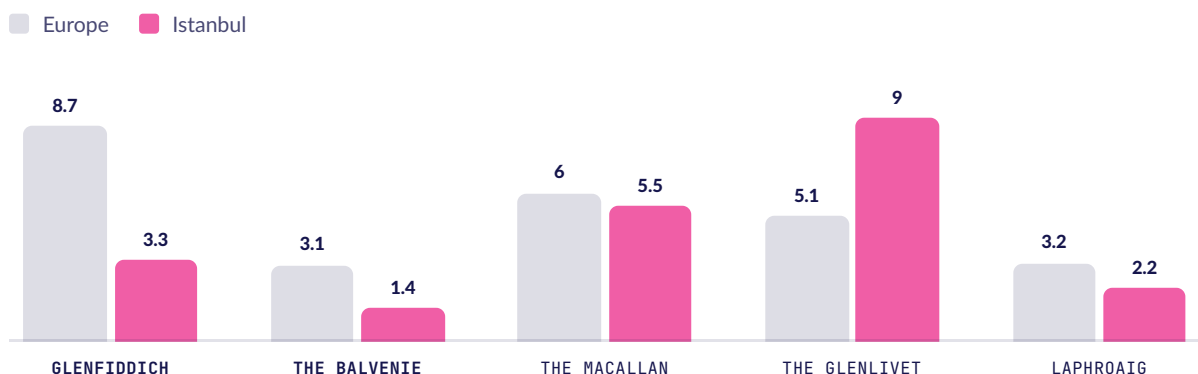


FINDING 03

The Glenlivet has the space Glenfiddich is missing.

Glenfiddich and The Balvenie under-index in Istanbul by 62% and 55% against their own European averages. The Macallan is in line with Europe. The Glenlivet holds nearly twice its European share — a clear target brand for space equalisation.

Brand share of Single Malt linear space — Europe v Istanbul (%)



BOLD LABELS = WILLIAM GRANT BRANDS

INSIDE THE STORE — ISTANBUL DEPARTURES

Two facings per SKU, against The Glenlivet's twelve.

The audit photos show Glenfiddich and The Balvenie present but thin on the fixture: 2.1 and 2.4 facings per SKU, the lowest of the key malt brands. The Glenlivet runs at 11.7. Even Laphroaig and The Macallan hold nearly double William Grant's facings.

The contrast with a well-executed store is clear: in Heathrow T4 both brands run at 4.4 facings per SKU, roughly double what Istanbul gives them.



SHELFTRAK AUDIT PHOTOS — ISTANBUL DEPARTURES MAIN STORE

FACINGS PER SKU

GLENFIDDICH	2.1
THE BALVENIE	2.4
THE GLENLIVET	11.7
LAPHROAIG	4.2
THE MACALLAN	3.7

SKU DENSITY RATIO

GLENFIDDICH	0.24
THE BALVENIE	0.22
THE GLENLIVET	1.1
LAPHROAIG	0.4
THE MACALLAN	0.41

SKU DENSITY RATIO = SKUS PER LINEAR METRE, AS REPORTED IN THE AUDIT · FOR COMPARISON, LHR T4: GLENFIDDICH 4.4 FACINGS PER SKU, THE BALVENIE 4.4

THE RECOMMENDATIONS

What the audit told William Grant to do next

01 Close the gap to the European average

William Grant holds 12.2% of Single Malt space across Europe and 4.7% in Istanbul. Moving the store towards the brand's own average is a significant space and assortment gain.

02 Rebuild the position against the other malts

The Glenlivet holds nearly three times Glenfiddich's share in Istanbul and five times its facings per SKU. The audit names the target for space equalisation and gives William Grant the evidence to reset its competitive position.

03 Lead the Single Malt category review

Single Malts are under-spaced in Istanbul as a segment, not just for one brand. The data supports William Grant advising Heinemann on a full Single Malt category development plan.

ABOUT SHELFTRAK



Shelftrak turns a photo of any shelf, fixture or back bar into verified, SKU-level data on space, range, price and promotion — helping brands and retailers across travel retail, multi-sector retail and on-trade & hospitality see what's really happening in store. Through market tracking, bespoke audits and expert-led advisory, that data becomes a clear plan for growth.

More information and case studies can be found at shelftrak.com