

THE KNOWLEDGE BANK

Delivered by
**Scotland Food & Drink
Partnership**

KEY TRENDS: Q1 2022

- ▶ Exports of Scottish food and drink were valued at £1.6 billion in Q1 2022, an increase of 37% vs Q1 2021
- ▶ The growth in Scottish food exports is broad-based, with almost every category seeing a double-digit percentage increase over last year
- ▶ The top five Scottish food export markets this quarter were:
 - France (£144m)
 - Netherlands (£30m)
 - Ireland (£27m)
 - USA (£25m)
 - Norway (£21)
- ▶ Western Europe more than doubled its imports of Scottish food from 2019 to 2021, indicating there may be strong market opportunities for our sector there
- ▶ Scotland's number one consumable export remains whisky, consistently representing approximately 75% of our total food and drink exports
- ▶ Unlike many sectors, whisky hasn't been massively impacted by the pandemic in terms of exports; in fact, it has seen a nearly 9% rise in exports the first quarter this year vs Q1 2019
- ▶ Fish and Seafood (including salmon) is our biggest food export, representing 55% of sales



Amanda Brown
*Project Director
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It's great to see the data indicating what we've all hoped: Scotland's food and drink exports are back on track to meet pre-Brexit and pre-Covid levels. In some cases, we've already exceeded it.

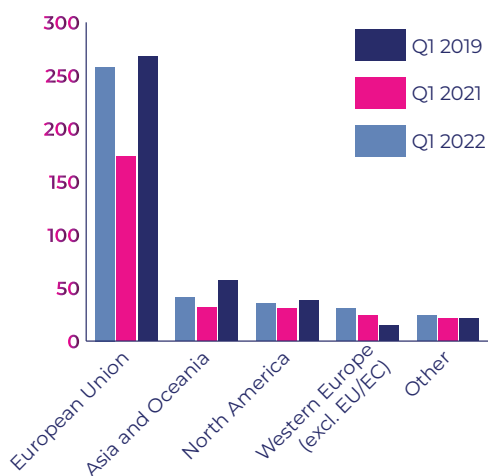
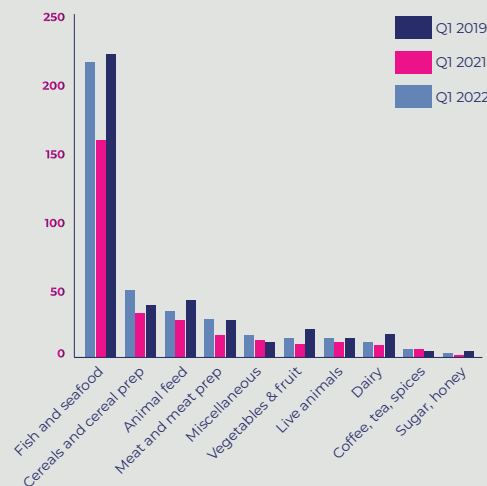
Of course, this has not been without added complications such as increased paperwork and expenses for many businesses.

In the charts below, we've included data from 2019 for comparison to a more stable time, before Covid-19, Brexit, and the war in Ukraine. For this reason, we have primarily focussed on 2022 vs 2019 when looking at how various sectors are performing.

For context, Scottish food exports in Q1 2022 were up 38% from the same time period in 2021, but 2.3% lower than 2019. It's clear we're heading in the right direction, but there's still a lot more to do to realise our full potential in the global marketplace.

SCOTTISH FOOD & DRINK EXPORTS BY CATEGORY (£M)

- ▶ More than half – 55% - of Scottish food exports are of fish and seafood (including salmon), a total value of £215m
- ▶ Exports of fish and seafood have almost returned to pre-pandemic levels, with a 3% decrease since 2019 – following a 36% drop in 2021
- ▶ Red meat saw the biggest growth this year of any category, an increase of 77% over last year
- ▶ Cereals are the second biggest sector with strong growth in the quarter v's last year and 2019
- ▶ Dairy and fruit and vegetables have strengthened their position over last year but are still some way off their export values in Q1 2019

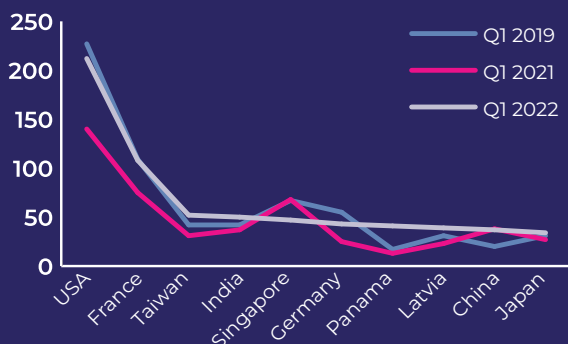


SCOTTISH FOOD EXPORTS BY REGION (£M)

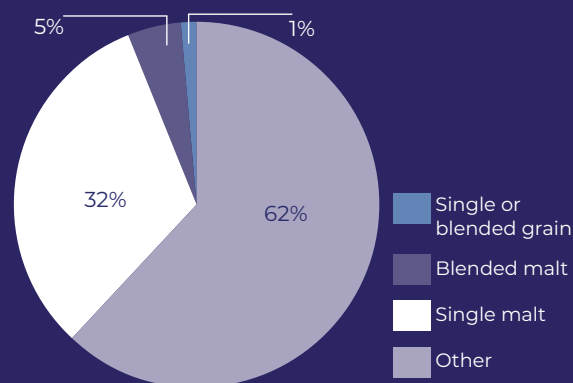
- ▶ The EU remains by far the largest importer of Scottish food, with two-thirds of our exports going there
- ▶ Despite a 49% drop in imports in 2021, the EU import market is stabilising, with only a 3.8% drop this quarter versus 2019
- ▶ Western Europe (excluding the EU and EC) has seen the biggest percentage rise in imports, with a 114% increase in 2022 vs 2019

SCOTCH WHISKY EXPORTS BY COUNTRY (£M)

- ▶ Whisky exports have surpassed pre-pandemic levels, with Scotland exporting nearly 9% more in Q1 2022 than 2019, an increase of £99m
- ▶ The United States and France continue to be the biggest markets for whisky, representing 26% of overall whisky exports – despite seeing a combined 4.7% drop since 2019
- ▶ Exports to Panama, the 7th biggest global market for Scotch, saw the biggest jump, with a 142% increase in whisky imports versus 2019
- ▶ Asian countries were also more likely to see an increase in whisky imports, with Singapore being the outlier and importing 30% less than pre-pandemic levels



WHISKY EXPORTS BY CATEGORY, Q1 2022 (£M)



- ▶ Single malt whisky has seen the largest jump by value this year versus 2019, with an increase of £54m
- ▶ “Other” whisky – including blended whisky and whisky liqueurs – is consistently the largest category both by sales and volume; in Q1 2022 it represented £751m or 62% of the whisky export market