



2012 Statistical Report

EXPORTS – UK – PRODUCTION – STOCK – EMPLOYMENT



Many of the tables summarise information sent to members of the Scotch Whisky Association (SWA) during the year. The source of such information is HM Revenue & Customs and the SWA Databank. HMRC export figures record direct shipments from the UK. Some shipments may be subject to further transfer to third countries.

Where information received is subject to subsequent amendment, the latest possible corrected figures have been used in this report. Thus, a small number of figures may have altered from earlier reports.

2012 grain production data is not included in the report because of the limited number of operators contributing to the data and the need to preserve producer confidentiality. The SWA may be able to resume the publication of grain production data if circumstances change.

Comparative figures for the previous year or years are provided where appropriate. All figures are given for calendar years unless stated.

New Combined Nomenclature (CN) Codes were introduced on 1 January 2010 to reflect the new Scotch Whisky categories as defined by The Scotch Whisky Regulations 2009. The codes do not include Northern Ireland whiskies or imported whiskies.

2208.30.30	Bottled Single Malt		
2208.30.41	Bottled Blended Malt	2208.30.49	Bulk Blended Malt
2208.30.61	Bottled Single/Blended Grain	2208.30.69	Bulk Single/Blended Grain
2208.30.71	Bottled Blended	2208.30.79	Bulk Blended

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PRODUCTION

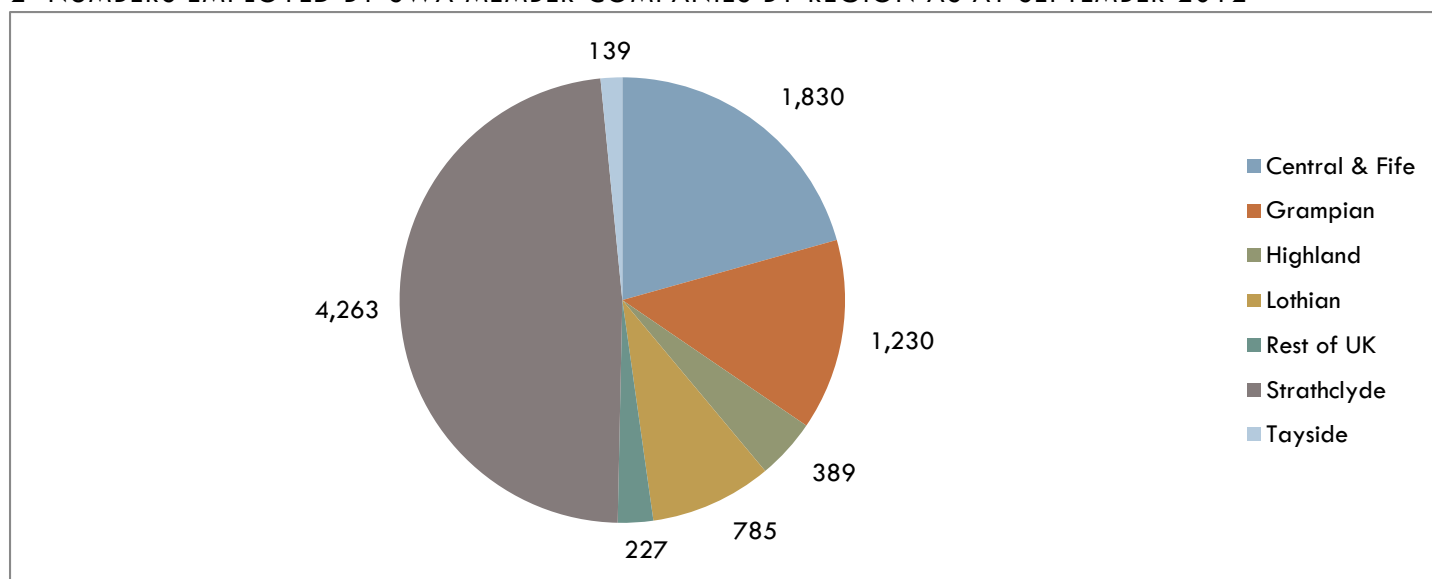
1 SCOTCH WHISKY PRODUCTION 1981 TO 2012

Year Ending 31 Dec	Malt	Grain	Total LPA	Year Ending 31 Dec	Malt	Grain	Total LPA
1981	110,083,000	157,898,000	267,981,000	1997	192,980,001	277,886,386	470,866,387
1982	96,649,000	151,021,000	247,670,000	1998	184,615,185	257,535,732	442,150,917
1983	93,398,000	145,683,000	239,081,000	1999	159,553,570	235,493,607	395,047,177
1984	99,540,000	153,908,000	253,448,000	2000	140,600,602	205,299,263	345,899,865
1985	104,803,000	155,777,000	260,580,000	2001	139,661,253	207,671,006	347,332,259
1986	103,823,000	161,124,000	264,947,000	2002	151,346,366	219,450,288	370,796,654
1987	115,974,000	173,719,000	289,693,000	2003	146,691,064	228,722,226	375,413,290
1988	138,041,000	191,897,000	329,938,000	2004	143,809,718	214,189,839	357,999,557
1989	167,187,000	218,294,000	385,481,000	2005	156,184,682	232,642,260	388,826,942
1990	192,823,000	235,939,000	428,762,000	2006	167,908,141	261,544,767	429,452,908
1991	186,265,957	230,534,943	416,800,900	2007	201,029,856	294,245,497	495,275,353
1992	166,491,138	216,975,189	383,466,327	2008	225,198,949	298,810,242	524,009,191
1993	140,942,181	210,235,959	351,178,140	2009	208,836,536	249,318,389	458,154,925
1994	146,424,242	208,489,770	354,914,012	2010	191,451,693	237,687,660	429,139,353
1995	158,079,324	236,159,123	394,238,447	2011	227,492,175	290,430,031	517,922,206
1996	170,135,855	258,965,585	429,101,440	2012	254,760,501	-	254,760,501

Figures for 1991 to 2012 are compiled from the SWA Databank. 2012 grain production data is not included in the report because of the limited number of operators contributing to the data and the need to preserve producer confidentiality. The SWA may be able to resume the publication of grain production data if circumstances change.

EMPLOYMENT

2 NUMBERS EMPLOYED BY SWA MEMBER COMPANIES BY REGION AS AT SEPTEMBER 2012



Figures are compiled from the SWA Databank and relate only to those member company employees directly employed within the Scotch Whisky industry.

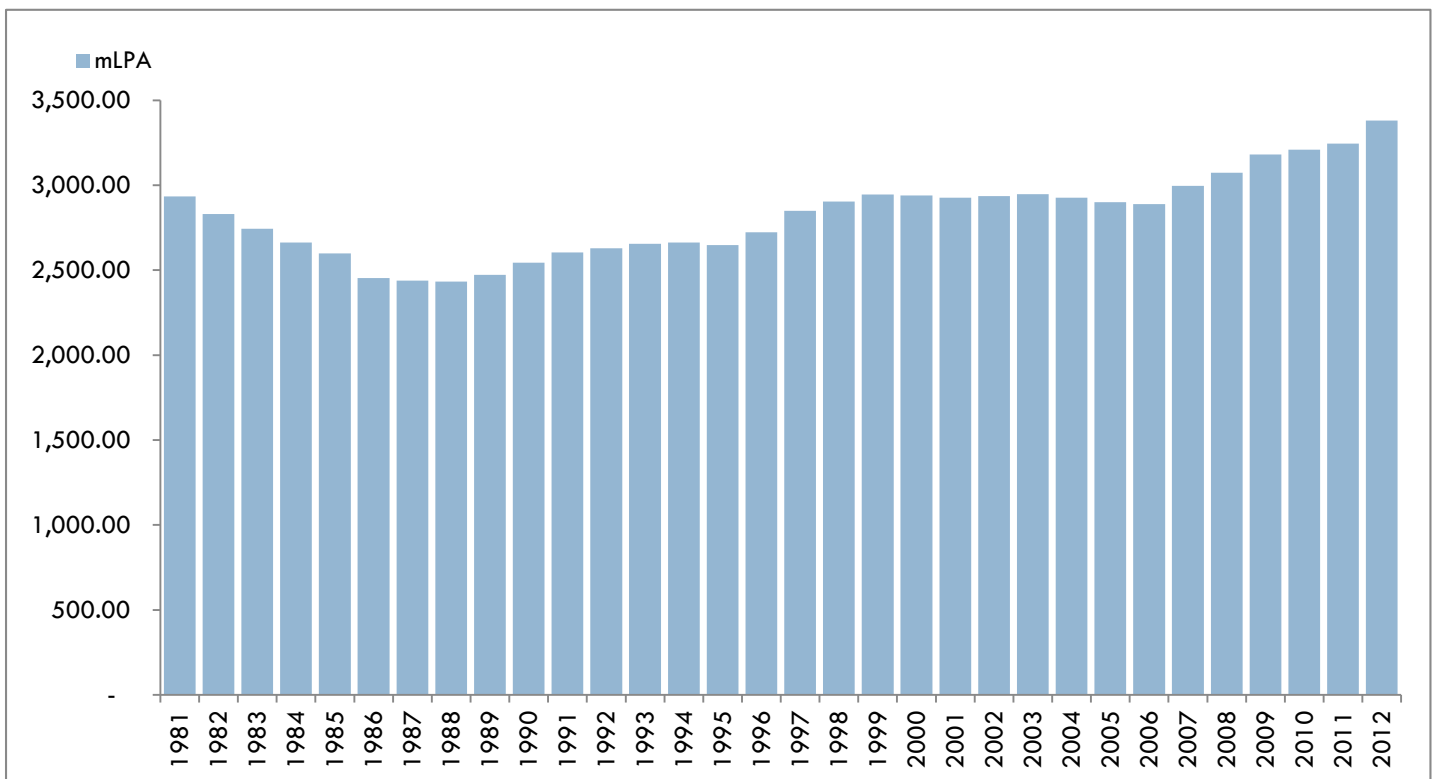
STOCK

3 STOCKS OF SCOTCH WHISKY IN BONDED WAREHOUSES AS AT 31 DECEMBER 1981 AND 2012

Year	Million LPA	Year	Million LPA
1981	2,933.64	1997	2,848.16
1982	2,830.46	1998	2,904.60
1983	2,743.62	1999	2,945.58
1984	2,661.97	2000	2,938.78
1985	2,598.26	2001	2,926.39
1986	2,453.01	2002	2,935.16
1987	2,438.32	2003	2,947.75
1988	2,433.20	2004	2,927.27
1989	2,473.10	2005	2,899.32
1990	2,543.20	2006	2,889.35
1991	2,604.40	2007	2,996.02
1992	2,628.76	2008	3,073.21
1993	2,655.39	2009	3,179.75
1994	2,661.67	2010	3,208.96
1995	2,647.38	2011	3,244.86
1996	2,722.28	2012	3,381.27

Stock for 1991 to 2012 are compiled from the SWA Databank.

4 STOCKS OF MATURING SCOTCH WHISKY 1981 TO 2012



Stock for 1991 to 2012 are compiled from the SWA Databank.

STOCK

5 CHANGES IN BULK STOCKS BY TYPE AND YEAR PRODUCED

	Stocks as at Dec 2012	Stocks as at Dec 2011	+/-
Bulk Malt Whisky			
Produced in 2012	255,222,244	-	255,222,244
Produced in 2011	223,125,644	228,512,405	-5,386,761
Produced in 2010	199,135,872	200,132,821	-996,949
Produced in 2009	174,010,323	208,717,673	-34,707,350
Produced in 2008	158,858,076	188,620,533	-29,762,457
Produced in 2007	112,615,518	139,981,381	-27,365,863
Produced in 2006	90,177,028	99,194,123	-9,017,095
Produced in 2005	80,715,393	81,347,944	-632,551
Produced in 2004	61,316,511	62,831,707	-1,515,196
Produced in 2003	54,459,098	54,809,200	-350,102
Produced in 2002	51,718,111	54,324,199	-2,606,088
Produced pre 2002	266,712,238	339,226,292	-72,514,054
Total	1,728,066,056	1,657,698,278	70,367,778
Bulk Grain Whisky			
Produced in 2012	307,646,108	-	307,646,108
Produced in 2011	287,452,608	286,356,962	1,095,646
Produced in 2010	231,645,308	230,179,431	1,465,877
Produced in 2009	169,601,928	235,343,861	-65,741,933
Produced in 2008	129,005,595	196,657,666	-67,652,071
Produced in 2007	93,449,876	129,061,184	-35,611,308
Produced in 2006	79,984,270	93,995,313	-14,011,043
Produced in 2005	52,245,012	56,727,011	-4,481,999
Produced in 2004	39,653,033	40,478,033	-825,000
Produced in 2003	44,420,688	45,533,682	-1,112,994
Produced in 2002	35,999,279	36,102,166	-102,887
Produced pre 2002	182,095,440	236,722,589	-54,627,149
Total	1,653,199,145	1,587,157,898	66,041,247
Bulk Malt and Grain Whisky			
Total Bulk Malt	1,728,066,056	1,657,698,278	70,367,778
Total Bulk Grain	1,653,199,145	1,587,157,898	66,041,247
Total	3,381,265,201	3,244,856,176	136,409,025

1. The criterion for gathering stock figures changed in 1994. From 1994, figures now include stock owned by non-members of the SWA but stored in SWA members' warehouses.
2. Stock data are compiled from the SWA Databank.

UK MARKET

6 MONTHLY TOTALS OF SCOTCH WHISKY RELEASED FOR CONSUMPTION IN THE UK FOR 2012 AND 2011

	2012				2011			
	Malt	Grain	Blended	Total	Malt	Grain	Blended	Total
January	157,700	-	1,125,200	1,282,900	165,000	600	1,286,400	1,452,000
February	127,300	-	1,352,200	1,479,500	129,400	500	1,339,000	1,468,900
March	297,400	-	4,087,600	4,385,000	245,300	900	3,317,600	3,563,800
April	166,800	-	717,100	883,900	110,100	1,200	785,400	896,700
May	217,900	-	1,241,400	1,459,300	231,700	6,400	1,187,700	1,425,800
June	249,900	-	1,320,900	1,570,800	250,000	6,700	1,583,300	1,840,000
July	167,600	-	1,135,500	1,303,100	201,000	-	1,489,200	1,690,200
August	175,100	-	1,394,100	1,569,200	201,700	-	1,543,700	1,745,400
September	204,700	-	1,672,700	1,877,400	238,200	-	1,784,500	2,022,700
October	313,400	-	2,456,000	2,769,400	405,700	-	2,433,000	2,838,700
November	544,700	-	3,320,700	3,865,400	552,400	-	2,968,000	3,520,400
December	473,000	-	2,316,300	2,789,300	487,000	-	2,257,800	2,744,800
Total	3,095,500	-	22,139,700	25,235,200	3,217,500	16,300	21,975,600	25,209,400

From April 2011, UK produced grain whisky clearances have been added to UK produced blended whisky clearances to preserve tax payer confidentiality. Source: HM Revenue & Customs

7 ANNUAL TOTALS OF SCOTCH WHISKY RELEASED FOR UK CONSUMPTION FOR THE YEARS ENDING 31 MARCH AND 31 DECEMBER 1981 TO 2012

	31 March	31 December	%		31 March	31 December	%
1981	49,727,800	47,710,800	-5	1997	31,936,100	31,198,400	-3
1982	45,601,200	44,751,100	-6	1998	29,899,000	28,863,800	-7
1983	43,137,400	44,479,800	-1	1999	30,368,700	32,276,100	12
1984	45,369,700	43,358,800	-3	2000	32,150,300	31,382,200	-3
1985	43,130,800	46,145,700	6	2001	31,732,000	32,079,300	2
1986	45,936,800	45,636,000	-1	2002	32,060,600	32,068,600	-0
1987	41,351,000	44,599,000	-2	2003	32,585,400	31,829,900	-1
1988	44,859,600	45,181,300	1	2004	31,906,400	31,929,500	0
1989	42,920,100	43,028,200	-5	2005	31,399,800	30,088,300	-6
1990	42,448,400	41,341,500	-4	2006	29,631,400	28,259,200	-6
1991	42,079,300	38,261,600	-7	2007	28,830,000	28,591,400	1
1992	32,273,400	35,785,800	-6	2008	29,633,800	28,937,500	1
1993	36,034,700	37,548,100	5	2009	26,761,100	25,809,500	-11
1994	35,925,800	38,344,600	2	2010	28,413,400	26,684,500	3
1995	36,988,100	31,007,100	-19	2011	26,067,000	25,209,400	-6
1996	32,113,900	32,065,300	3	2012	25,872,100	25,235,200	0

Source: HM Revenue & Customs

2012 EXPORT STATISTICS

Scotch Whisky exports grew in value for the eighth consecutive year in 2012, confirming the industry as one of the UK's top exporting sectors

- Exports increased by 1% in value to £4.27 billion.
- **Scotch Whisky delivered £135 a second in exports.**
- The equivalent of 1.19bn bottles was shipped worldwide.
- **Higher export value for both Single Malt and Blended Scotch Whiskies.**
- Around 31% of exports are to EU countries.
- **The USA remains the largest market, with exports up to 16% to £758m.**



EXPORT MARKETS

8 EXPORTS OF SCOTCH WHISKY FOR THE CALENDAR YEARS 1981 TO 2012

	Volume	Value		Volume	Value
	LPA	£ million		LPA	£ million
1981	244,239,375	784.75	1997	276,937,370	2,394.33
1982	251,277,064	871.60	1998	254,042,920	2,030.41
1983	227,844,492	858.09	1999	266,630,395	2,093.69
1984	231,286,678	931.38	2000	277,096,784	2,156.71
1985	225,894,432	993.94	2001	283,632,089	2,295.29
1986	236,188,393	1,070.13	2002	263,772,741	2,285.29
1987	240,174,162	1,135.51	2003	273,269,419	2,375.43
1988	245,977,491	1,288.79	2004	267,300,351	2,263.04
1989	242,491,750	1,469.46	2005	277,904,381	2,370.34
1990	238,304,608	1,712.48	2006	294,502,609	2,478.63
1991	227,748,446	1,833.89	2007	318,436,324	2,824.55
1992	231,272,367	1,958.88	2008	302,367,100	3,056.88
1993	256,872,038	2,093.85	2009	304,342,467	3,134.64
1994	252,209,071	2,191.29	2010	297,398,055	3,447.79
1995	262,078,484	2,277.05	2011	353,963,645	4,225.76
1996	256,805,902	2,278.13	2012	335,593,301	4,273.21

Source: HM Revenue & Customs

9 EXPORTS OF SCOTCH WHISKY TO THE MAJOR MARKETS IN 2012

	% of Market	Malt			Blend		Total	£ Million
		Bottled	Bulk	Grain	Bottled	Bulk		
EU ex UK	32.71	15,030,684	684,347	2,048,476	80,619,045	19,645,765	118,028,317	1,326.45
France	11.94	6,060,178	13,556	500,759	23,562,281	12,963,492	43,100,266	433.96
Spain	4.66	1,246,933	9,883	60,893	13,951,999	1,538,678	16,808,386	195.34
Germany	4.08	2,908,284	93,156	199,615	8,839,233	2,684,917	14,725,205	168.87
Poland	1.49	52,856	-	652,721	4,622,537	57,189	5,385,303	43.35
Estonia	1.29	168,589	-	3,083	4,288,576	176,618	4,636,866	69.39
Italy	1.24	1,341,997	514,183	57,471	2,241,706	337,016	4,492,373	41.14
Netherlands	1.21	1,641,421	5,510	267,867	2,116,700	352,135	4,383,633	49.32
Others	6.79	1,610,426	48,059	306,067	20,996,013	1,535,720	24,496,285	325.08
USA	9.89	4,871,461	10,172	72,633	24,236,117	6,506,237	35,696,620	757.99
Singapore	4.98	1,601,947	-	216,454	16,004,368	150,710	17,973,479	339.16
India	4.55	821,689	10,075,856	5,381	1,361,388	4,159,069	16,423,383	61.59
South Africa	4.13	2,009,215	445,854	54,212	11,362,324	1,024,030	14,895,635	161.57
Brazil	3.58	1,764,379	2,736,700	6,698	8,188,579	213,585	12,909,941	83.65
Mexico	2.74	112,248	6,072	28,234	9,415,203	331,736	9,893,493	91.85
Thailand	2.61	30,395	4,457,717	11,688	4,911,074	4,669	9,415,543	38.95
UK	6.99	3,095,500	-	-	22,139,700	-	25,235,200	-
Total All Markets	100.00	33,826,697	22,112,101	6,463,022	262,353,896	36,072,785	360,828,501	-

Volume figures are in LPA

EXPORT MARKETS

10 SUMMARY OF 2012 EXPORTS OF SCOTCH WHISKY BY MARKET GROUPS

	Volume			Value		
	2012	2011	% Diff	2012	2011	% Diff
1. Europe						
EU†	118,028,317	132,303,170	-11	1,326,452,691	1,448,326,333	-8
Eastern Europe	3,400,605	3,956,298	-14	39,314,962	48,982,325	-20
Other	6,095,295	6,905,534	-12	86,313,046	77,164,062	12
Total	127,524,217	143,165,002	-11	1,452,080,699	1,574,472,720	-8
2. Americas						
a. North America						
Canada & St Pierre-Miquelon	3,108,654	3,219,770	-3	63,422,370	60,493,574	5
USA	35,696,620	36,398,458	-2	757,985,401	654,899,296	16
Mexico	9,893,493	8,948,659	11	91,845,908	80,854,301	14
Sub-total	48,698,767	48,566,887	0	913,253,679	796,247,171	15
b. Central & South America	44,869,554	45,407,648	-1	505,376,527	489,279,849	3
Total	93,568,321	93,974,535	-0	1,418,630,206	1,285,527,020	10
3. Australasia						
Australia	7,410,375	7,436,064	-0	78,593,608	69,288,231	13
New Zealand	649,097	613,883	6	5,806,849	6,346,929	-9
Other	271,047	271,496	-0	2,645,143	2,836,588	-7
Total	8,330,519	8,321,443	0	87,045,600	78,471,748	11
4. Asia						
Singapore	17,973,479	17,664,674	2	339,160,652	317,870,880	7
South Korea	7,496,514	8,799,650	-15	135,729,290	142,592,838	-5
Thailand	9,415,543	10,163,247	-7	38,950,349	50,253,381	-22
Other	38,110,565	40,038,892	-5	415,578,586	401,154,979	4
Total	72,996,101	76,666,463	-5	929,418,877	911,872,078	2
5. Africa						
South Africa	14,895,635	13,765,856	8	161,570,751	165,507,244	-2
Other	6,359,722	5,291,921	20	77,096,442	58,591,589	32
Total	21,255,357	19,057,777	12	238,667,193	224,098,833	7
6. Middle East	11,918,786	12,778,425	-7	147,366,007	151,318,182	-3
Total Exports	335,593,301	353,963,645	-5	4,273,208,582	4,225,760,581	1

† Excludes United Kingdom Releases (see table 6)

EXPORT MARKETS

11 EXPORTS OF SCOTCH WHISKY FOR 2012 AND 2011

	Volume mlpa				Value £m			
	2012	2011	+/-	%	2012	2011	+/-	%
Blended								
- bottled	240.21	252.77	-12.55	-5	3,223.77	3,224.37	-0.60	-0
- shipped in bulk	36.07	39.02	-2.95	-8	124.71	111.82	12.89	12
Total Blended	276.29	291.79	-15.50	-5	3,348.48	3,336.20	12.29	0
Malt								
- single	27.17	28.05	-0.89	-3	778.10	744.61	33.49	4
- blended bottled	3.57	3.47	0.10	3	54.31	41.21	13.11	32
- blended shipped in bulk	22.11	22.54	-0.43	-2	72.48	70.24	2.24	3
Total Malt	52.84	54.06	-1.22	-2	904.90	856.06	48.84	6
Single/Blended Grain								
- bottled	0.18	1.07	-0.90	-83	1.90	8.77	-6.87	-78
- shipped in bulk	6.29	7.04	-0.76	-11	17.93	24.74	-6.81	-28
Total Grain	6.46	8.12	-1.65	-20	19.83	33.51	-13.68	-41
Total Exports	335.59	353.96	-18.37	-5	4,273.21	4,225.76	47.45	1

Source: HM Revenue & Customs

12 TOP 20 EXPORT MARKETS FOR SCOTCH WHISKY IN 2012

Volume			Value		
Rank	Country	LPA	Rank	Country	£ Sterling
1	France	43,100,266	1	USA	757,985,401
2	USA	35,696,620	2	France	433,963,881
3	Singapore	17,973,479	3	Singapore	339,160,652
4	Spain	16,808,386	4	Spain	195,339,341
5	India	16,423,383	5	Germany	168,865,341
6	South Africa	14,895,635	6	Taiwan	165,407,673
7	Germany	14,725,205	7	South Africa	161,570,751
8	Brazil	12,909,941	8	South Korea	135,729,290
9	Mexico	9,893,493	9	Venezuela	102,263,495
10	Thailand	9,415,543	10	Mexico	91,845,908
11	Venezuela	8,862,428	11	Brazil	83,649,175
12	South Korea	7,496,514	12	United Arab Emirates	80,357,018
13	Australia	7,410,375	13	Latvia	79,070,651
14	China	6,422,228	14	Australia	78,593,608
15	Taiwan	6,236,553	15	China	71,515,325
16	Poland	5,385,303	16	Japan	70,078,373
17	United Arab Emirates	5,365,767	17	Estonia	69,390,195
18	Japan	5,090,693	18	Canada	63,422,370
19	Estonia	4,636,866	19	India	61,592,090
20	Italy	4,492,373	20	Panama	52,594,327

Source: HM Revenue & Customs

EXPORT MARKETS

13 VOLUME AND VALUE OF EXPORTS OF SCOTCH WHISKY BY COUNTRY FOR YEARS 2012 AND 2011

	Volume (LPA)			Value (£)		
	2012	2011	% Diff	2012	2011	% Diff
Albania	4,618	1,096	321	65,223	28,130	132
Algeria	107,009	182,170	-41	2,242,676	2,801,968	-20
Andorra	416,471	452,175	-8	3,769,981	4,008,570	-6
Angola	1,754,022	923,094	90	19,258,130	10,492,479	84
Anguilla	663	2,253	-71	11,987	56,044	-79
Antarctica	-	4,082	-100	-	42,237	-100
Antigua & Barbuda	47,493	69,798	-32	928,151	989,665	-6
Argentina	1,574,689	1,720,332	-8	13,932,793	13,315,841	5
Armenia	34,508	26,804	29	596,278	336,707	77
Aruba	2,012,170	1,742,640	15	46,504,234	35,851,740	30
Australia	7,410,375	7,436,064	-0	78,593,608	69,288,231	13
Austria	310,460	260,235	19	4,675,079	4,325,522	8
Azerbaijan	36,515	16,584	120	1,144,285	648,245	77
Bahamas	14,386	16,409	-12	295,886	410,061	-28
Bahrain	717,536	831,248	-14	5,742,506	5,480,596	5
Bangladesh	37,856	74,630	-49	231,419	421,805	-45
Barbados	9,344	26,966	-65	276,394	742,250	-63
Belarus	205,258	105,348	95	974,551	887,942	10
Belgium	1,803,911	1,443,434	25	24,426,505	20,619,871	18
Belize	67,092	46,230	45	1,974,707	1,473,909	34
Benin	16,830	52,663	-68	518,582	611,971	-15
Bermuda	12,416	17,054	-27	227,288	304,466	-25
Bhutan	10,719	28,628	-63	78,987	328,039	-76
Bolivia	231,170	335,082	-31	5,027,413	5,527,424	-9
Bosnia & Herzegovina	33,064	40,747	-19	342,325	633,313	-46
Brazil	12,909,941	13,145,354	-2	83,649,175	99,189,665	-16
Brunei Darussalam	4,044	2,955	37	21,106	22,183	-5
Bulgaria	2,217,928	1,817,159	22	20,121,399	18,893,649	6
Burkina Faso	41,539	29,272	42	1,070,670	466,206	130
Burma (Myanmar)	201,598	122,703	64	883,734	534,097	65
Cambodia	368	5,168	-93	37,706	50,293	-25
Cameroon	268,076	263,286	2	2,671,769	2,415,701	-11
Canada	3,108,654	3,219,770	-3	63,422,370	60,493,574	5
Cape Verde	42,585	48,068	11	546,148	582,949	-6
Cayman Islands	7,930	3,452	130	230,049	98,020	135
Central African Republic	-	16,324	-100	-	113,983	-100
Ceuta	4	-	100	1,769	-	100
Chile	2,457,135	2,078,210	18	27,861,379	21,897,790	27
China	6,422,228	6,168,060	4	71,515,325	66,075,590	8
Colombia	1,930,775	1,828,414	6	22,703,080	23,627,713	-4
Congo	80,166	79,127	1	1,115,479	1,216,955	-8
Congo Democratic Republic	87,236	94,875	-8	1,917,703	1,724,007	-11

EXPORT MARKETS

13 VOLUME AND VALUE OF EXPORTS OF SCOTCH WHISKY BY COUNTRY FOR YEARS 2012 AND 2011

	Volume (LPA)			Value (£)		
	2012	2011	% Diff	2012	2011	% Diff
Costa Rica	719,833	648,025	11	8,094,521	6,631,569	22
Croatia	253,926	192,737	32	2,831,146	2,161,344	31
Cuba	93,268	69,122	35	868,661	722,513	20
Cyprus	930,448	779,855	19	13,162,178	10,255,077	28
Czech Republic	848,424	354,305	139	8,108,181	3,691,094	120
Denmark	1,249,700	1,080,392	16	15,138,800	13,730,696	10
Djibouti	109,537	103,790	6	1,076,619	958,910	12
Dominica	15,783	9,906	59	187,036	161,755	16
Dominican Republic	1,774,924	2,417,520	-27	24,719,373	23,831,235	4
Ecuador	828,681	1,702,782	-51	5,732,296	9,841,090	-42
Egypt	332,331	239,136	39	5,407,675	4,594,452	18
El Salvador	45,155	60,722	-26	695,160	961,738	-28
Equatorial Guinea	86,443	107,851	-20	1,952,465	1,518,996	29
Estonia	4,636,866	4,208,408	10	69,390,195	54,078,786	28
Ethiopia	141,049	147,315	-4	2,925,827	3,074,856	-5
Falkland Islands	1,627	991	64	25,115	12,088	108
Fiji	5,002	4,634	8	28,867	53,465	-46
Finland	849,257	570,583	49	10,843,412	7,578,410	43
France	43,100,266	57,473,661	-25	433,963,881	535,424,982	-19
French Polynesia	24,171	27,603	-12	218,021	254,765	-14
Gabon	208,289	177,938	17	2,749,861	2,222,839	24
Gambia	1,483	1,003	48	13,819	13,237	4
Georgia	196,683	180,108	9	2,996,277	2,551,351	17
Germany	14,725,205	13,973,824	5	168,865,341	149,559,681	13
Ghana	160,642	126,690	27	1,169,986	823,102	42
Gibraltar	36,561	47,109	-22	442,262	615,960	-28
Greece	3,680,337	4,664,501	-21	49,614,151	70,485,066	-30
Grenada	6,908	6,824	1	118,718	111,125	7
Guam	6,485	11,608	-44	202,183	356,074	-43
Guatemala	259,117	300,223	-14	3,840,389	3,826,221	0
Guinea	7,357	3,804	93	196,143	58,936	233
Haiti	38,666	137,855	-72	331,933	1,259,968	-74
Honduras	16,611	53,959	-69	432,316	1,231,905	-65
Hong Kong	1,069,828	1,201,960	-11	20,709,307	22,459,155	-8
Hungary	543,061	505,134	8	4,762,634	5,369,037	-11
Iceland	22,278	20,390	9	335,767	344,652	-3
India	16,423,383	15,669,319	5	61,592,090	52,739,959	17
Indonesia	2,946	-	100	126,333	-	100
Iran	3,078	-	100	14,041	-	100
Iraq	895,920	1,112,466	-19	8,125,347	10,351,791	-22
Irish Republic	488,982	355,450	38	4,790,777	3,454,512	39
Israel	857,762	965,013	-11	9,053,256	12,356,455	-27
Italy	4,492,373	4,438,579	1	41,140,370	46,106,072	-11
Ivory Coast	47,349	32,746	45	667,641	415,043	61

EXPORT MARKETS

13 VOLUME AND VALUE OF EXPORTS OF SCOTCH WHISKY BY COUNTRY FOR YEARS 2012 AND 2011

	Volume (LPA)			Value (£)		
	2012	2011	% Diff	2012	2011	% Diff
Jamaica	27,590	9,462	192	283,197	149,605	89
Japan	5,090,693	6,961,371	-27	70,078,373	74,518,364	-6
Jordan	338,358	288,166	17	3,299,021	2,436,488	35
Kazakhstan	89,112	98,903	-10	417,565	1,170,621	-64
Kenya	233,012	376,578	-38	2,081,971	2,436,288	-15
Latvia	3,933,141	2,470,484	59	79,070,651	53,551,859	48
Lebanon	2,316,429	2,393,527	-3	29,902,016	28,459,009	5
Liberia	32,275	2,076	1,455	697,359	49,336	1,313
Lithuania	327,016	192,710	70	2,384,107	1,533,906	55
Luxembourg	2,558	3,970	-36	146,162	117,218	25
Macao	6,238	991	529	458,541	120,339	281
Madagascar	61,058	21,496	184	852,755	308,013	177
Malaysia	1,101,773	1,040,721	6	14,718,413	14,099,575	4
Maldives	9,687	10,155	-5	215,352	172,737	25
Mali	12,270	12,013	2	220,078	234,604	-6
Malta	160,697	156,477	3	2,074,312	1,914,288	8
Mauritius	172,638	196,701	-12	1,291,781	1,197,395	8
Mexico	9,893,493	8,948,659	11	91,845,908	80,854,301	14
Moldova	2,573	3,825	-33	66,000	70,025	-6
Mongolia	3,448	7,120	-52	27,497	66,423	-59
Montenegro	12,198	-	100	48,891	-	100
Montserrat	774	1,764	-56	8,856	18,176	-51
Morocco	537,008	630,196	-15	8,490,669	7,393,000	15
Mozambique	84,905	39,420	115	928,761	482,384	93
Namibia	88,375	111,074	-20	2,238,905	1,800,947	24
Nepal	56,711	60,256	-6	183,442	211,148	-13
Netherlands	4,383,633	4,214,768	4	49,318,557	45,340,275	9
Netherlands Antilles	1,067,044	947,782	13	20,191,950	18,481,583	9
New Caledonia	209,689	222,934	-6	1,996,594	2,138,630	-7
New Zealand	649,097	613,883	6	5,806,849	6,346,929	-9
Nicaragua	17,326	9,553	81	238,584	102,132	134
Nigeria	1,135,262	689,318	65	9,554,376	5,116,533	87
Niue Island	-	180	-100	-	7,800	-100
Norway	352,828	376,231	-6	5,781,389	6,535,150	-12
Oman	1,024,840	779,797	31	5,552,235	5,093,138	9
Panama	3,683,997	3,121,646	18	52,594,327	48,046,346	9
Papua New Guinea	24,676	4,200	488	189,432	22,720	734
Paraguay	1,240,864	1,638,022	-24	19,913,884	24,635,298	-19
Peru	1,343,917	1,302,365	3	18,899,704	17,797,675	6
Philippines	803,191	1,277,910	-37	2,214,017	3,176,404	-30
Poland	5,385,303	4,567,494	18	43,350,261	42,155,019	3
Portugal	3,188,318	3,844,909	-17	33,680,037	45,289,458	-26
Qatar	368,686	342,391	8	4,964,425	3,860,338	29

EXPORT MARKETS

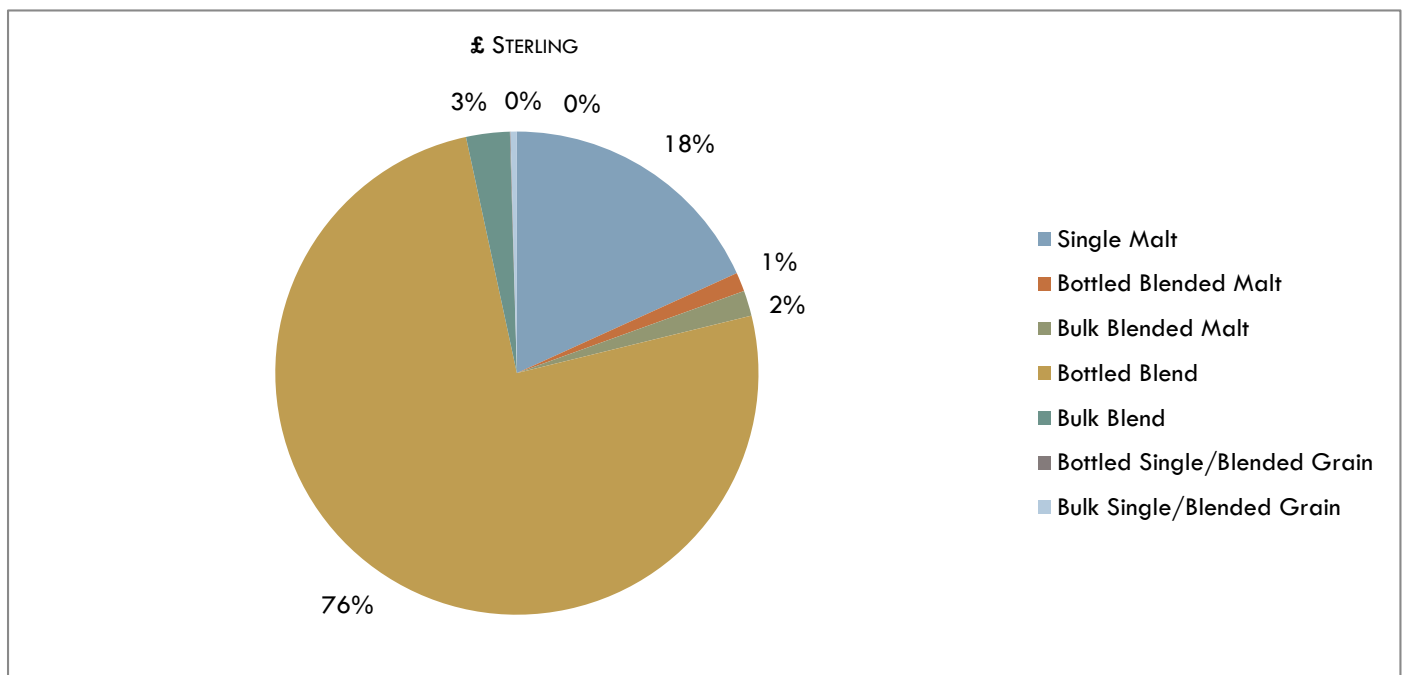
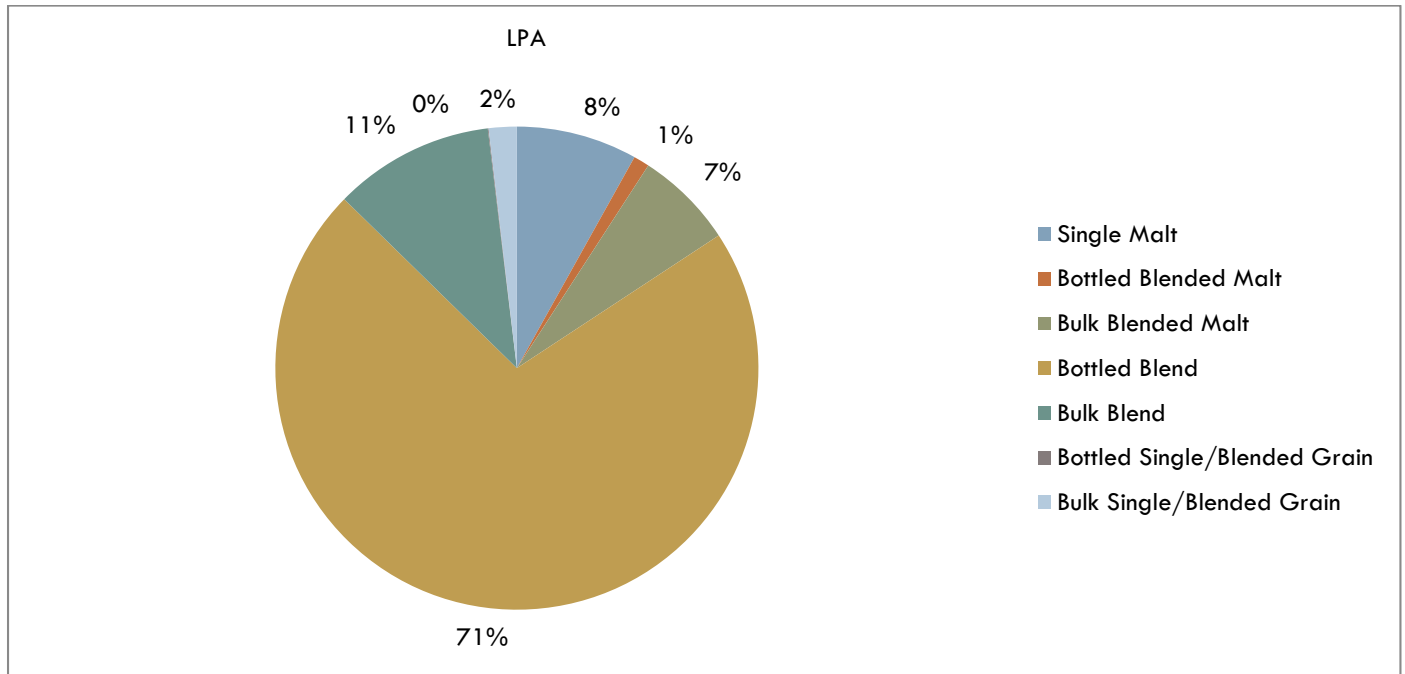
13 VOLUME AND VALUE OF EXPORTS OF SCOTCH WHISKY BY COUNTRY FOR YEARS 2012 AND 2011

	Volume (LPA)			Value (£)		
	2012	2011	% Diff	2012	2011	% Diff
Romania	1,198,412	1,232,508	-3	13,449,420	14,369,789	-6
Russia	2,117,353	2,969,370	-29	23,139,410	35,731,780	-35
San Marino	112	-	100	2,546	-	100
Sao Tome & Principe	2,712	72	3,667	38,486	18,745	105
Saudi Arabia	803	4,918	-84	6,939	25,270	-73
Senegal	16,132	30,959	-48	311,703	619,796	-50
Serbia	171,499	176,334	-3	1,809,162	1,699,285	6
Seychelles	41,242	42,415	-3	541,344	559,765	-3
Sierra Leone	12,604	8,356	51	157,190	156,126	1
Singapore	17,973,479	17,664,674	2	339,160,652	317,870,880	7
Slovakia	69,428	76,303	-9	777,573	651,654	19
Slovenia	220,597	226,948	-3	2,180,371	2,591,730	-16
South Africa	14,895,635	13,765,856	8	161,570,751	165,507,244	-2
South Georgia & Southern	-	1,980	-100	-	18,925	-100
South Korea	7,496,514	8,799,650	-15	135,729,290	142,592,838	-5
Spain	16,808,386	20,947,576	-20	195,339,341	259,214,348	-25
Sri Lanka	344,563	517,285	-33	4,781,033	7,092,379	-33
St Christopher (St Kitts) & St Helena	14,299	10,537	36	158,957	132,660	20
St Lucia	126	-	100	4,455	-	100
St Vincent	36,146	70,140	-48	192,431	603,106	-68
Surinam	4,341	3,551	22	122,604	83,556	47
Swaziland	338,980	378,877	-11	6,863,567	6,593,115	4
Sweden	55,433	92,330	-40	343,451	433,497	-21
Switzerland	2,473,610	2,443,503	1	35,678,996	38,024,334	-6
Syria	1,980,264	1,894,278	5	31,446,669	29,217,137	8
Taiwan	29,607	110,381	-73	349,203	1,255,317	-72
Tanzania	6,236,553	6,366,644	-2	165,407,673	155,156,832	7
Thailand	217,521	213,359	2	1,632,246	1,564,433	4
Togo	9,415,543	10,163,247	-7	38,950,349	50,253,381	-22
Trinidad & Tobago	47,444	38,604	23	661,033	520,901	27
Tunisia	298,632	487,027	-39	6,758,133	8,319,855	-19
Turkey	20,057	21,551	-7	394,514	408,804	-3
Turks & Caicos Islands	3,286,622	4,115,351	-20	44,515,931	36,442,593	22
Uganda	2,562	2,333	10	105,057	93,722	12
Ukraine	67,673	108,741	-38	422,022	594,011	-29
United Arab Emirates	237,444	140,952	68	4,785,200	3,008,036	59
Uruguay	5,365,767	5,950,518	-10	80,357,018	81,999,780	-2
US Virgin Islands	2,809,662	3,008,587	-7	27,402,808	27,399,601	0
USA	41,816	56,547	-26	619,188	1,148,079	-46
Uzbekistan	35,696,620	36,398,458	-2	757,985,401	654,899,296	16
Vatican City	5,854	3,490	68	98,649	55,546	78
Venezuela	155	-	100	16,732	-	100
Vietnam	8,862,428	7,908,031	12	102,263,495	83,398,587	23
Virgin Islands (British)	284,738	523,016	-46	2,298,238	3,909,657	-41
Wallis & Futuna Islands	3,399	5,239	-35	91,731	139,796	-34
Zambia	1,024	337	204	10,046	3,134	221
Zimbabwe	21,014	19,731	7	639,583	471,737	36
Total	9,018	7,779	16	92,567	118,684	-22
Total	335,593,301	353,963,645	-5	4,273,208,582	4,225,760,581	1

Source: HM Revenue & Customs

EXPORT MARKETS

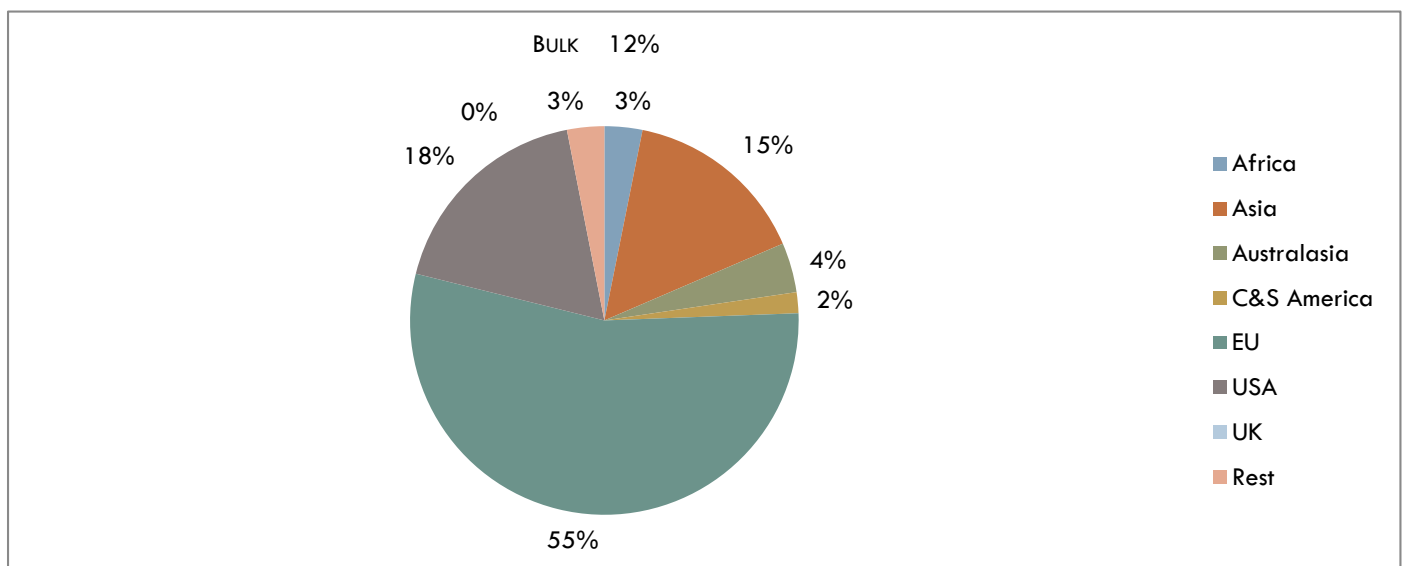
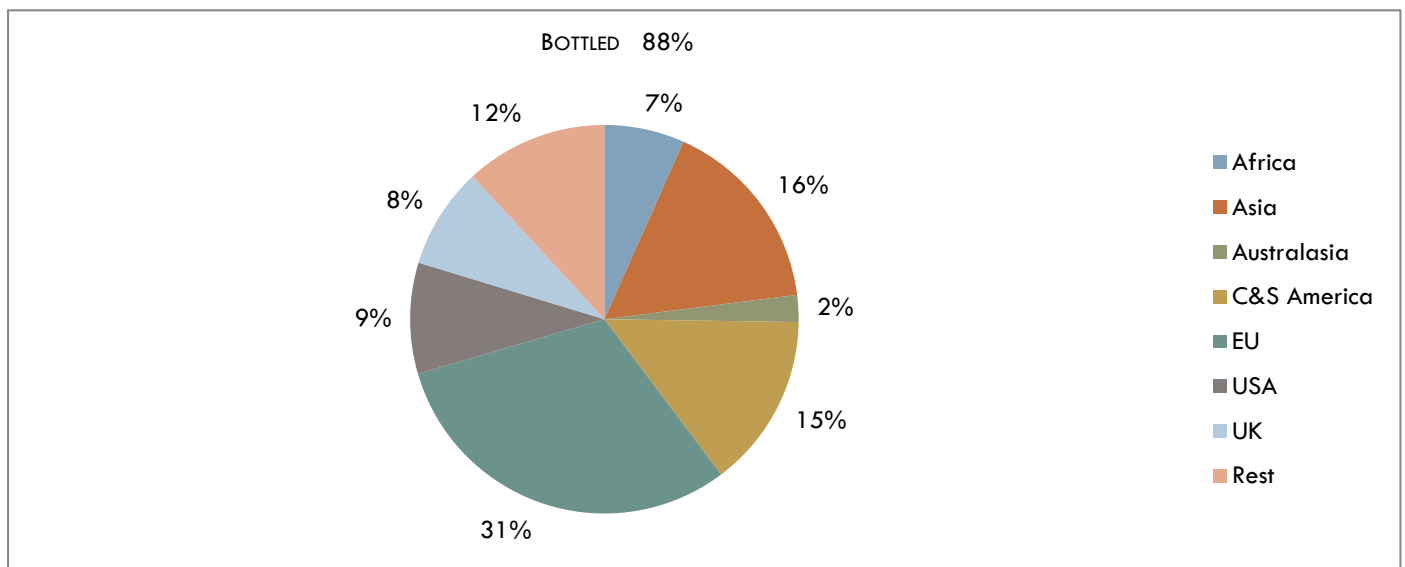
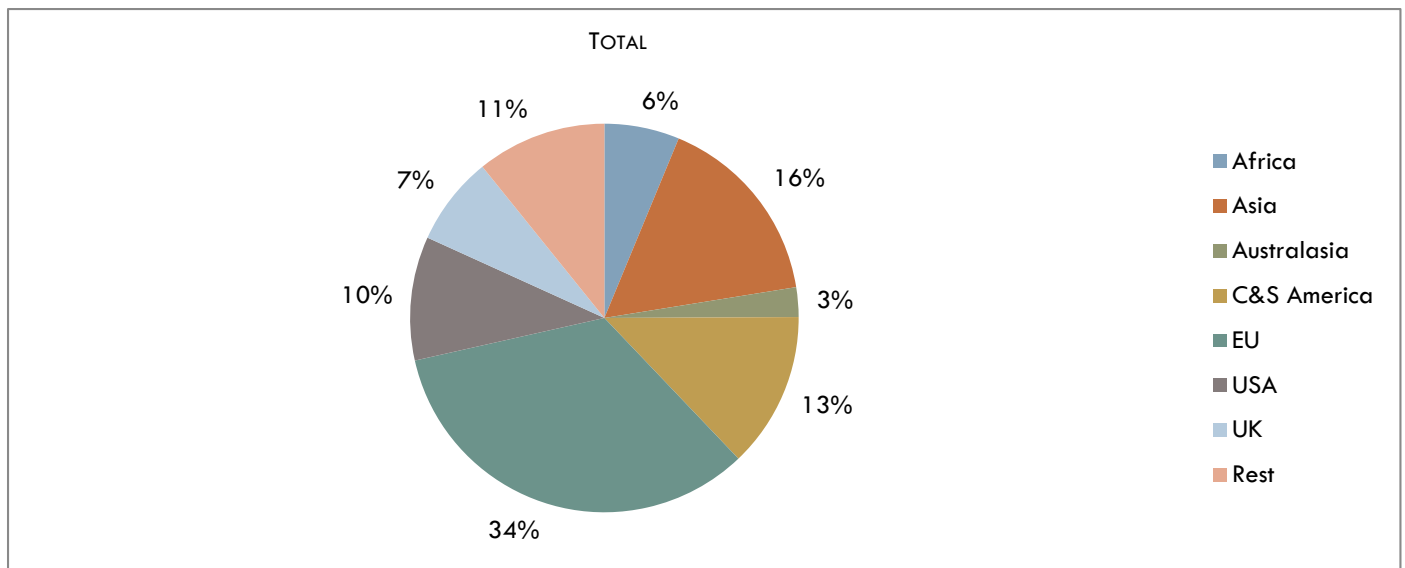
14 GLOBAL SCOTCH WHISKY BY CATEGORY FOR THE YEAR ENDING 2012



Source: HM Revenue & Customs

EXPORT MARKETS

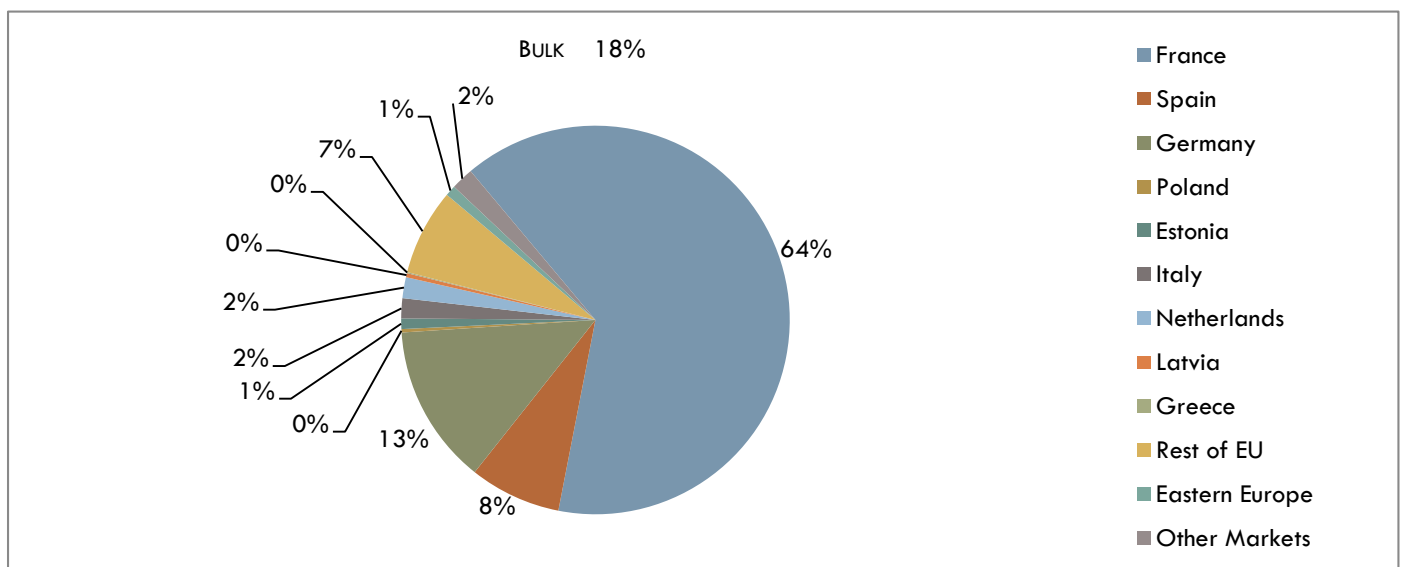
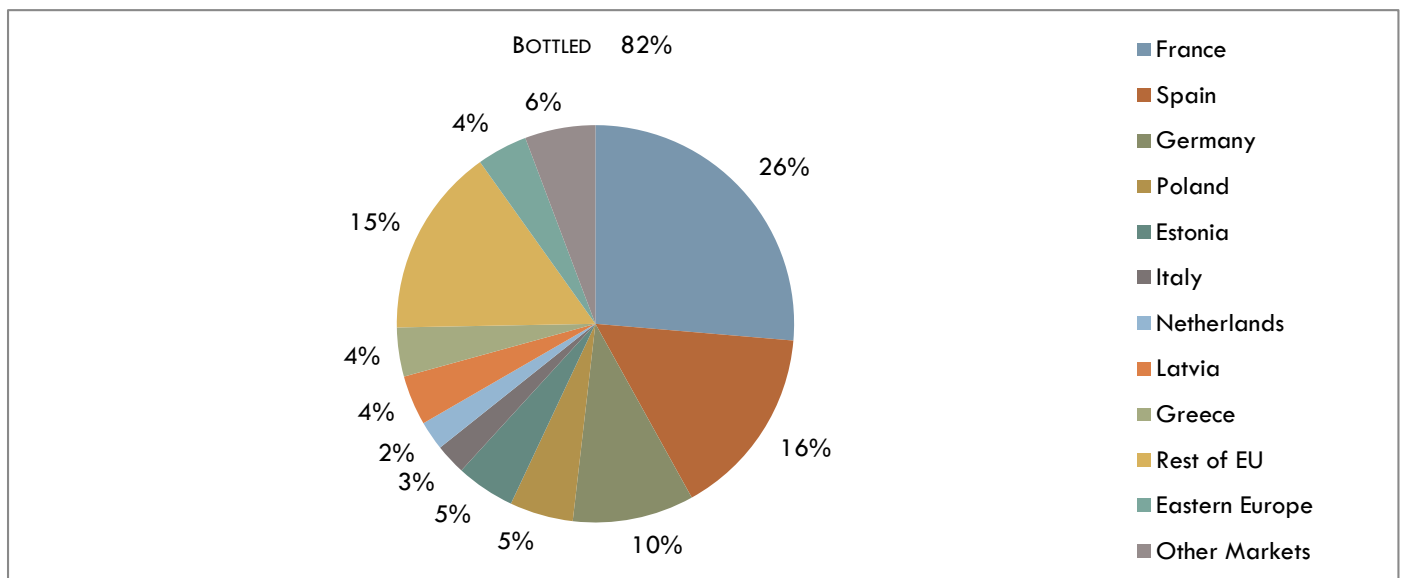
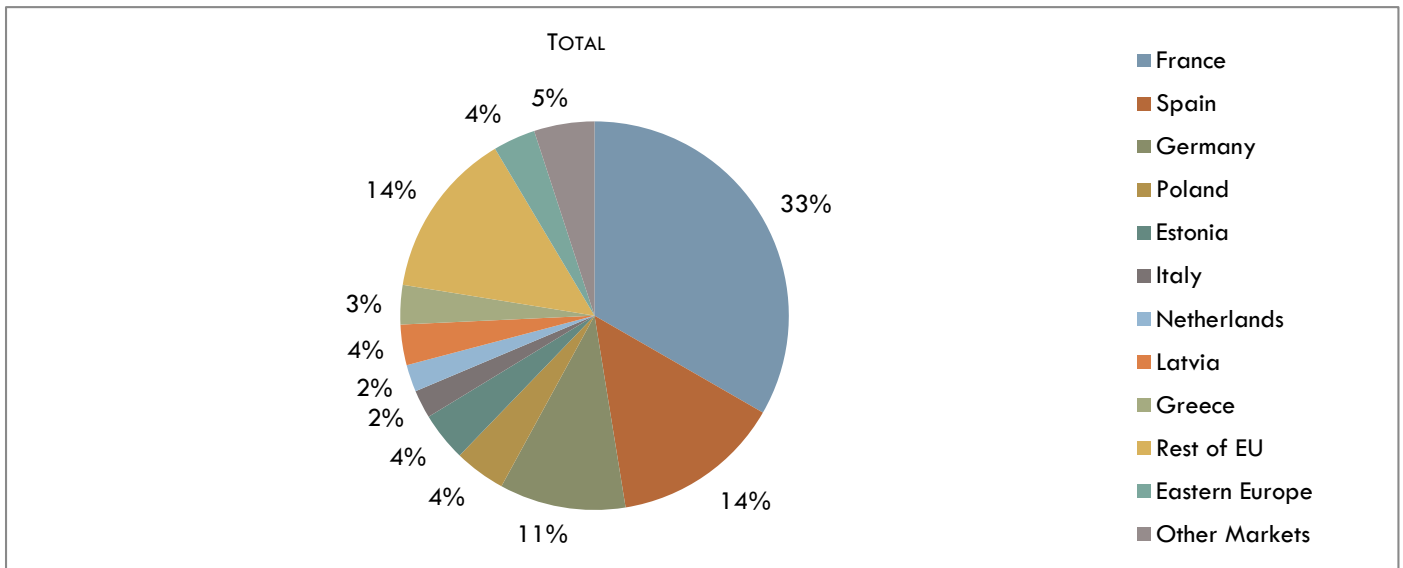
15 GEOGRAPHIC DISTRIBUTION OF 2012 WORLD EXPORTS OF BLENDED SCOTCH WHISKY



Source: HM Revenue & Customs

EXPORT MARKETS

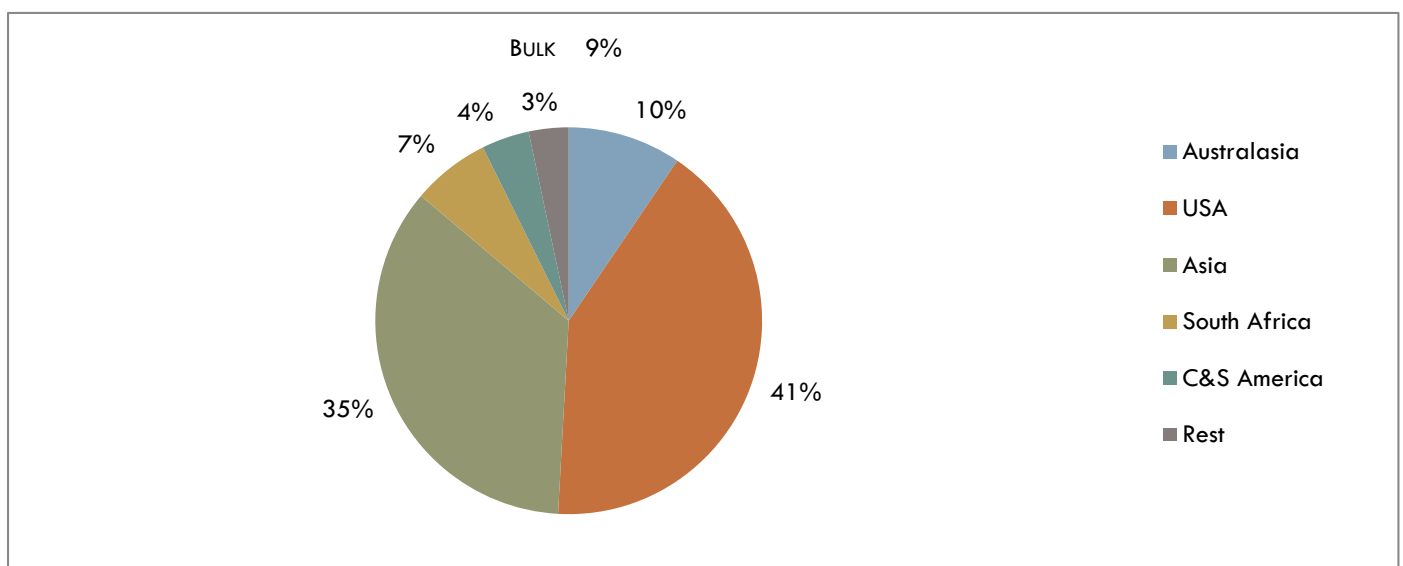
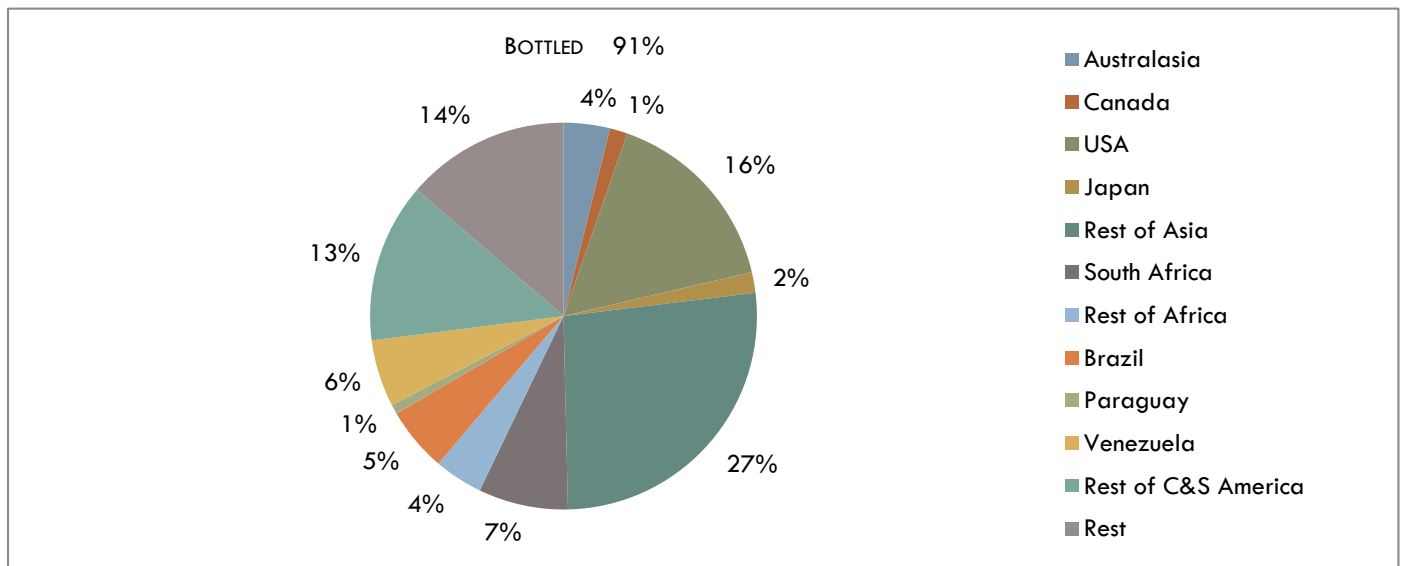
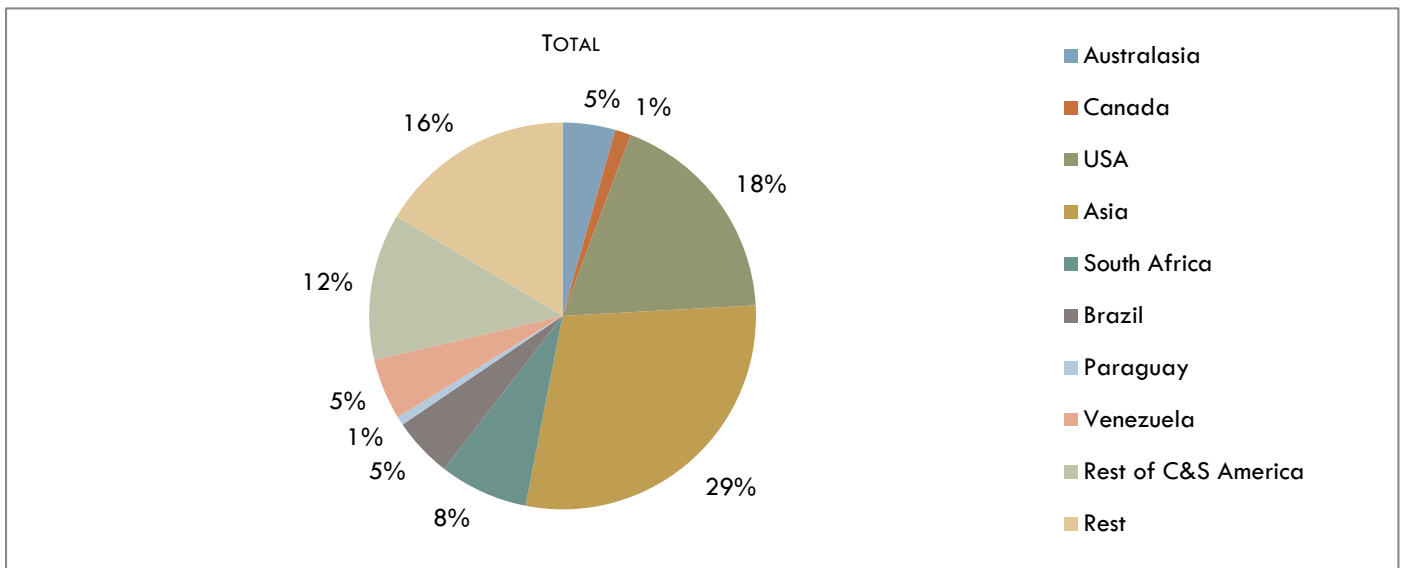
16 MARKET DISTRIBUTION OF 2012 EXPORTS OF BLENDED SCOTCH WHISKY IN CONTINENTAL EUROPE



Source: HM Revenue & Customs

EXPORT MARKETS

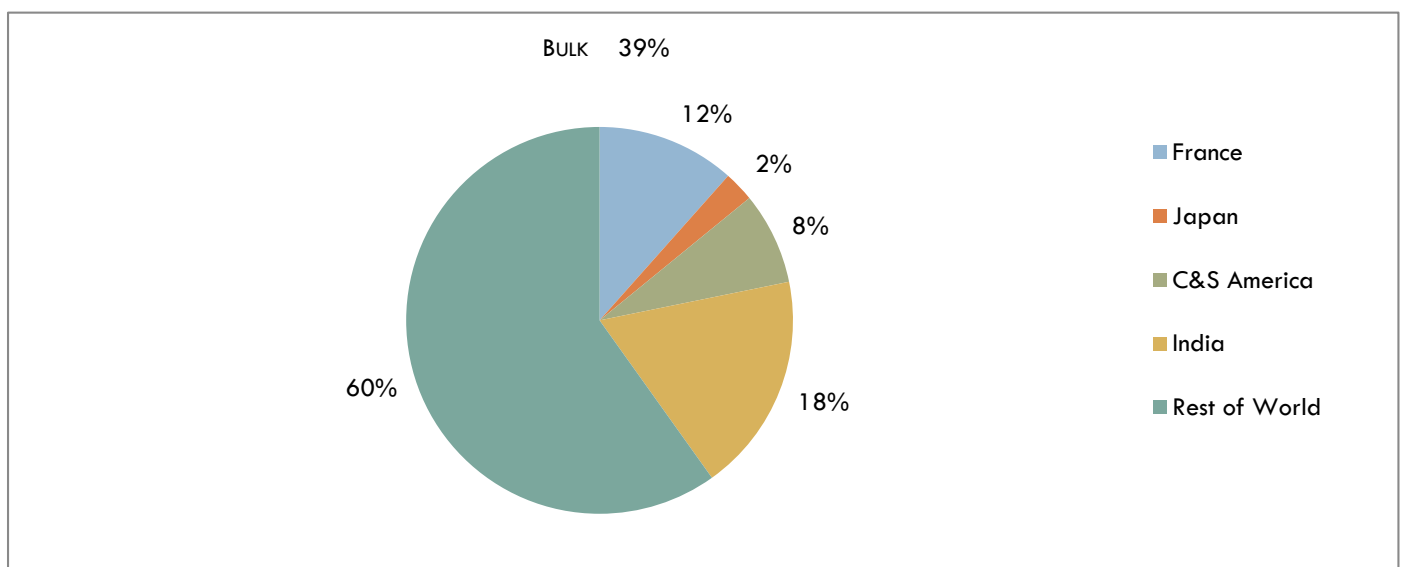
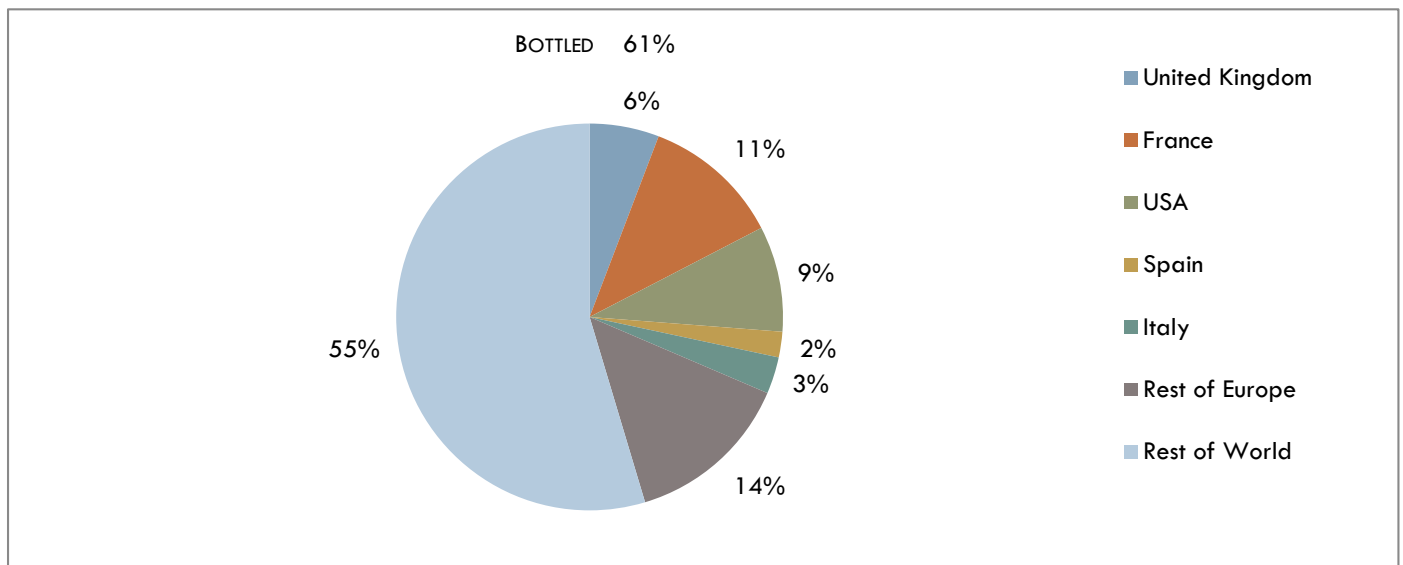
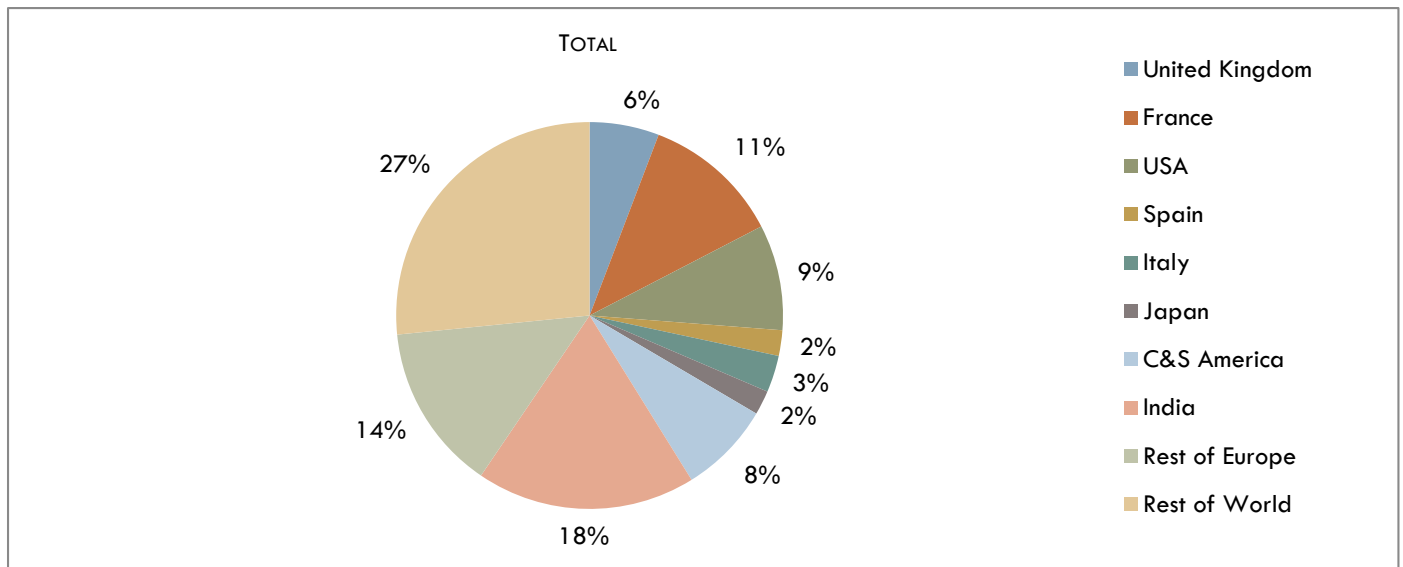
17 MARKET DISTRIBUTION OF 2012 SALES OF BLENDED SCOTCH WHISKY IN 'REST OF WORLD'



Source: HM Revenue & Customs

EXPORT MARKETS

18 MARKET DISTRIBUTION OF 2012 SALES OF MALT SCOTCH WHISKY



Source: HM Revenue & Customs

UK DUTY

19 SCOTCH WHISKY – INCIDENCE OF DUTY

		Duty per 75cl bottle	Duty per litre of pure alcohol			Duty per 70cl bottle	Duty per 75cl bottle	Duty per litre of pure alcohol
		£	£			£	£	£
1947	13 November	1.11	3.68	1985	19 March	0	4.73	15.77
1948	12 April	1.23	4.06	1990	20 March	0	5.21	17.35
1961	26 July (10% Regulator)	1.35	4.47	1991	19 March	0	5.69	18.96
1964	15 April	1.5	4.96	1992	10 March	5.55	5.94	19.81
1965	7 April	1.7	5.63	1993	30 November	5.55		19.81
1966	21 July (10% Regulator)	1.87	6.19	1994	8 December	5.77		20.60
1968	20 March	2	6.61	1995	25 November	5.54		19.78
1968	22 November (10% Regulator)	2.2	7.26	1996	26 November	5.32		18.99
1973	1 April	1.8	5.95	1997	2 July	5.48		19.56
1974	27 March	1.98	6.55	1998	17 March	5.48		19.56
1975	15 April	2.57	8.51	2006	22 March	5.48		19.56
1976	6 April	2.87	9.49	2007	21 March	5.48		19.56
1977	1 January	3.16	10.44	2008	12 March	5.98		21.35
1980	27 March	3.56	11.87	2009	22 April	6.34		22.64
1981	10 March	4.08	13.6	2010	24 March	6.66		23.80
1982	9 March	4.34	14.47	2011	23 March	7.15		25.52
1983	15 March	4.56	15.19	2012	21 March	7.51		26.81
1984	13 March	4.64	15.48	2013	20 March	7.90		28.22

Notes:

1. The 10% increase in the Spirits Duty in 1961, 1966, and 1968 were consolidated into the Spirit Duty by the Finance Act in the following years.
2. 70cl bottle mandatory from 1 January 1992 under EC Directive 75/106 (as subsequently amended).
3. The duty increase announced on 8 December 1994 came into effect from 1 January 1995.
4. The duty increase announced on 2 July 1997 came into effect from 1 January 1998.
5. The duty increase announced on 12 March 2008 came into effect from 17 March 2008.
6. VAT The duty was subject to Value Added Tax at 10% from 1 April 1973, 8% from 29 July 1975, 15% from 12 June 1979, 17.5% from 1 April 1991 and 20% from 4 January 2011.
7. The duty increase announced on: 24 March 2010 came into effect from 29 March 2010; 23 March 2011 from 28 March 2011; 21 March 2012 from 26 March 2012 and 20 March from 25 March 2013.

20 DUTY RATIOS PER UNIT OF ALCOHOL BETWEEN SCOTCH WHISKY AND OTHER ALCOHOLIC DRINKS

	ABV	1998	1999	2000/1/2	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013
Beer	3.52%	1:1.76	1:1.70	1:1.65	1:1.60	1:1.55	1:1.51	1:1.48	1:1.43	1:1.32	1:1.38	1:1.37	1:1.38	1:1.38	1:1.48
Table Wine	12.50%	1:1.69	1:1.64	1:1.58	1:1.54	1:1.50	1:1.46	1:1.42	1:1.37	1:1.37	1:1.32	1:1.32	1:1.32	1:1.32	1:1.32

21 APPROX. AMOUNT OF DUTY ON A NORMAL MEASURE OF 3 KINDS OF ALCOHOLIC DRINK, EACH CONTAINING APPROX. THE SAME AMOUNT OF ALCOHOL

	ABV	2009	2010	2011	2012	2013
284ml (½ pint) Beer	3.52%	16.46	17.31p	18.56p	19.51p	19.12p
125ml Table Wine	12.50%	17.12	18.00p	19.34p	20.27p	21.34p
25ml Scotch Whisky	40.00%	22.64	23.80p	25.52p	26.81p	28.22p

EXPORT MARKETS

22 COUNTRY LISTING BY REGION

AFRICA

Algeria, Angola, Benin, Botswana, British Indian Ocean Territory, Burkina Faso, Burundi, Cameroon, Cape Verde, Central African Republic, Chad, Comoros, Congo, Congo Democratic Republic, Djibouti, Egypt, Equatorial Guinea, Eritrea, Ethiopia, Gabon, Gambia, Ghana, Guinea, Guinea-Bissau, Ivory Coast (Cote d'Ivoire), Kenya, Lesotho, Liberia, Libya, Madagascar, Malawi, Mali, Mauritania, Mauritius, Mayotte, Morocco, Mozambique, Namibia, Niger, Nigeria, Reunion, Rwanda, Sao Tome & Principe, Senegal, Seychelles, Sierra Leone, Somalia, South Africa, St Helena, Sudan, Swaziland, Tanzania, Togo, Tunisia, Uganda, Zambia, Zimbabwe

ASIA

Afghanistan, Bangladesh, Bhutan, Brunei Darussalam, Burma (Myanmar), Cambodia, China, East Timor, Hong Kong, India, Indonesia, Japan, Laos, Macao, Malaysia, Maldives, Mongolia, Nepal, North Korea, Pakistan, Philippines, Singapore, South Korea, Sri Lanka, Taiwan, Thailand, Vietnam

AUSTRALIA

Australia, Christmas Islands, Cocos Islands, Cook Islands, Fiji, French Polynesia, Guam, Heard Island & McDonald Islands, Kiribati, Marshall Islands, Micronesia, Nauru, New Caledonia, New Zealand, Niue Island, Norfolk Island, Palau, Papua New Guinea, Pitcairn, Samoa, Solomon Islands, Tokelau Islands, Tonga, Tuvalu, US Minor Islands, Vanuatu, Wallis & Futuna Islands

CENTRAL & SOUTH AMERICAS

Anguilla, Antarctica, Antigua & Barbuda, Argentina, Aruba, Bahamas, Barbados, Belize, Bermuda, Bolivia, Bouvet Island, Brazil, Cayman Islands, Chile, Colombia, Costa Rica, Cuba, Dominica, Dominican Republic, Ecuador, El Salvador, Falkland Islands, French Guiana, French Southern Territories, Grenada, Guadeloupe, Guatemala, Guyana, Haiti, Honduras, Jamaica, Martinique, Montserrat, Netherlands Antilles, Nicaragua, Panama, Paraguay, Peru, South Georgia & Southern Sandwich Islands, St Christopher (St Kitts) & Nevis, St Lucia, St Vincent, Surinam, Trinidad & Tobago, Turks & Caicos Islands, Uruguay, US Virgin Islands, Venezuela, Virgin Islands (British)

EASTERN EUROPE

Albania, Armenia, Azerbaijan, Belarus, Bosnia & Herzegovina, Croatia, Georgia, Kazakhstan, Kosovo, Kyrgyzstan, FYR Macedonia, Moldova, Montenegro, Russia, Serbia, Tajikistan, Turkmenistan, Ukraine, Uzbekistan

EUROPE – OTHER

Andorra, Ceuta, Faroe Islands, Gibraltar, Greenland, Iceland, Liechtenstein, Melilla, Norway, San Marino, Svalbard Archipelago, Switzerland, Turkey, Vatican City

EUROPEAN UNION (EXC UK)

Austria, Belgium, Bulgaria, Cyprus, Czech Republic, Denmark, Estonia, Finland, France, Germany, Greece, Hungary, Irish Republic, Italy, Latvia, Lithuania, Luxembourg, Malta, Netherlands, Poland, Portugal, Romania, Slovakia, Slovenia, Spain, Sweden

MIDDLE EAST

Bahrain, Iran, Iraq, Israel, Jordan, Kuwait, Lebanon, Occupied Palestinian Territory, Oman, Qatar, Saudi Arabia, Syria, United Arab Emirates, Yemen

NORTH AMERICA

Canada, Mexico, St Pierre & Miquelon, USA