

2011 STATISTICAL REPORT



Exports - UK - Production - Stock - Employment

The Statistical Report presents information about the activities of the Scotch Whisky industry during 2011.

2011 Statistical report

EXPORTS - UK - PRODUCTION - STOCK - EMPLOYMENT

Comparative figures for the previous year or years are provided where appropriate.

Many of the tables summarise information sent to members of the Scotch Whisky Association during the year. The source of such information is HM Revenue & Customs and The Scotch Whisky Association 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.

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

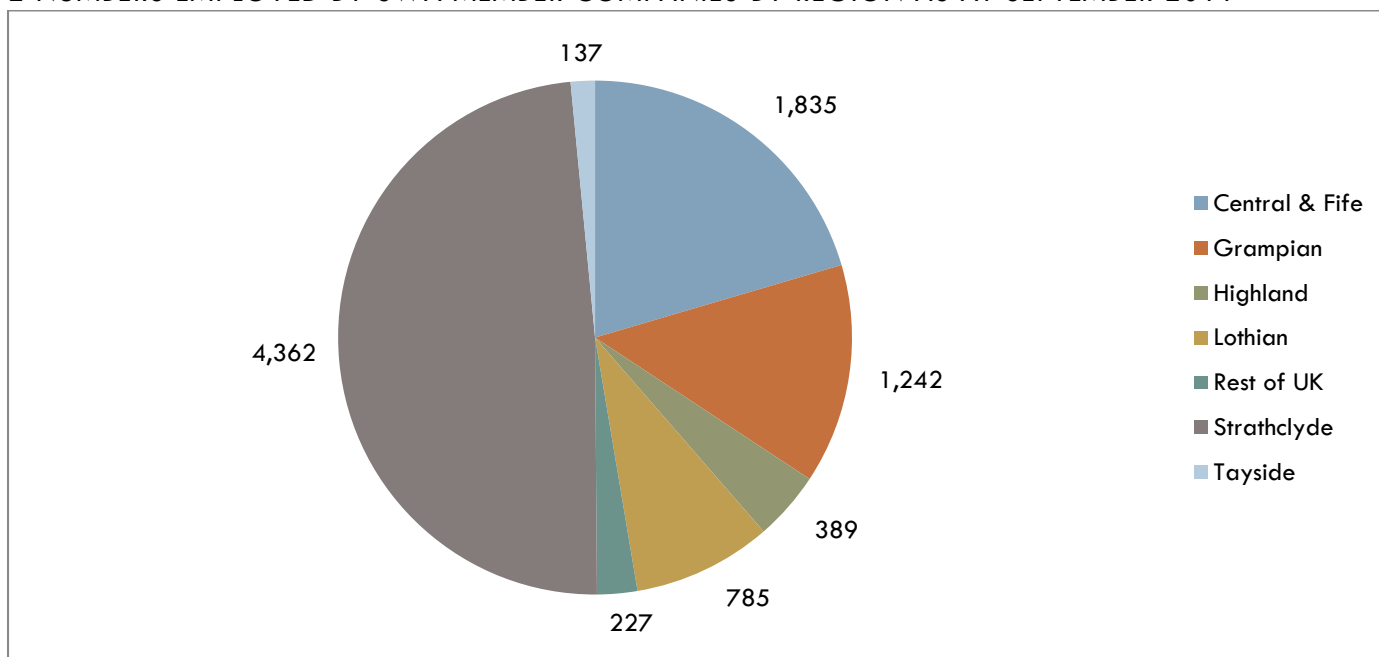
1 SCOTCH WHISKY PRODUCTION 1980 TO 2011

Year Ending 31 Dec	Malt	Grain	Total LPA	Year Ending 31 Dec	Malt	Grain	Total LPA
1980	177,913,000	237,957,000	415,870,000	1996	170,135,855	258,965,585	429,101,440
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

Figures for 1991 to 2011 compiled from the SWA Databank

EMPLOYMENT

2 NUMBERS EMPLOYED BY SWA MEMBER COMPANIES BY REGION AS AT SEPTEMBER 2011



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

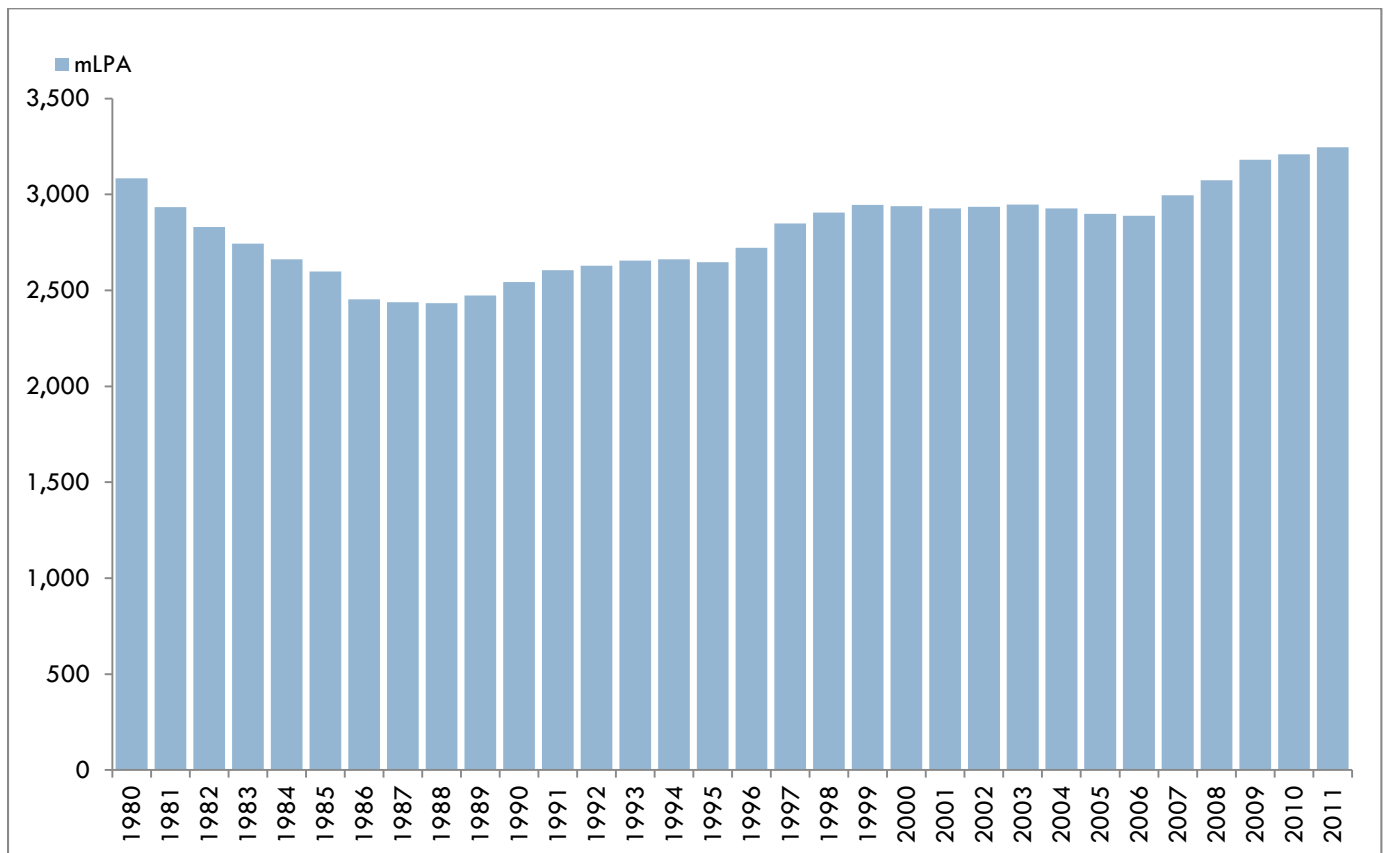
STOCK

3 STOCKS OF SCOTCH WHISKY IN BONDED WAREHOUSES AS AT 31 DECEMBER 1980 TO 2011

	Million LPA		Million LPA
1980	3,083.51	1996	2,722.28
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

Stock for 1991 to 2011 compiled from the SWA Databank

4 STOCKS OF MATURING SCOTCH WHISKY 1980 TO 2011



Stock for 1991 to 2011 compiled from the SWA Databank

STOCK (CONTD)

5 CHANGES IN BULK STOCKS BY TYPE AND YEAR PRODUCED

	Stocks as at Dec 2011	Stocks as at Dec 2010	+/-
BULK MALT WHISKY (LPA)			
Produced in 2011	228,512,405	-	228,512,405
Produced in 2010	200,132,821	209,007,807	-8,874,986
Produced in 2009	208,717,673	217,364,024	-8,646,351
Produced in 2008	188,620,533	233,137,018	-44,516,485
Produced in 2007	139,981,381	171,600,033	-31,618,652
Produced in 2006	99,194,123	129,019,034	-29,824,911
Produced in 2005	81,347,944	89,389,214	-8,041,270
Produced in 2004	62,831,707	66,430,410	-3,598,703
Produced in 2003	54,809,200	57,351,187	-2,541,987
Produced in 2002	54,324,199	55,856,254	-1,532,055
Produced in 2001	50,152,358	52,196,756	-2,044,398
Produced pre 2000	289,073,934	363,606,932	-74,532,998
Total	1,657,698,278	1,644,958,669	12,739,609
BULK GRAIN WHISKY (LPA)			
Produced in 2011	286,356,962	-	286,356,962
Produced in 2010	230,179,431	227,480,893	2,698,538
Produced in 2009	235,343,861	235,374,769	-30,908
Produced in 2008	196,657,666	288,333,535	-91,675,869
Produced in 2007	129,061,184	192,185,177	-63,123,993
Produced in 2006	93,995,313	125,111,078	-31,115,765
Produced in 2005	56,727,011	68,130,764	-11,403,753
Produced in 2004	40,478,033	41,739,153	-1,261,120
Produced in 2003	45,533,682	46,420,272	- 886,590
Produced in 2002	36,102,166	37,259,680	-1,157,514
Produced in 2001	33,577,149	34,082,103	-504,954
Produced pre 2000	203,145,440	267,885,360	-64,739,920
Total	1,587,157,898	1,564,002,784	23,155,114
BULK MALT AND GRAIN WHISKY (LPA)			
Total Bulk Malt	1,657,698,278	1,644,958,669	12,739,609
Total Bulk Grain	1,587,157,898	1,564,002,784	23,155,114
Total	3,244,856,176	3,208,961,453	35,894,723

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 compiled from the SWA Databank.

UK MARKET

6 MONTHLY TOTALS OF SCOTCH WHISKY RELEASED FOR CONSUMPTION IN THE UK FOR 2011 AND 2010

	2011 (LPA)				2010 (LPA)			
	Malt	Grain	Blended	Total	Malt	Grain	Blended	Total
January	165,000	600	1,286,400	1,452,000	194,900	800	1,590,600	1,786,300
February	129,400	500	1,339,000	1,468,900	163,100	600	1,434,100	1,597,800
March	245,300	900	3,317,600	3,563,800	238,400	400	3,479,300	3,718,100
April	110,100	1,200	785,400	896,700	146,500	900	1,312,800	1,460,200
May	231,700	6,400	1,187,700	1,425,800	194,000	500	1,237,000	1,431,500
June	250,000	6,700	1,583,300	1,840,000	267,200	600	1,698,900	1,966,700
July	201,000	-	1,489,200	1,690,200	203,600	2,600	1,287,200	1,493,400
August	201,700	-	1,543,700	1,745,400	222,000	1,000	1,379,700	1,602,700
September	238,200	-	1,784,500	2,022,700	190,100	700	1,381,000	1,571,800
October	405,700	-	2,433,000	2,838,700	443,700	1,300	2,803,700	3,248,700
November	552,400	-	2,968,000	3,520,400	572,000	1,100	3,233,200	3,806,300
December	487,000	-	2,257,800	2,744,800	496,200	400	2,504,400	3,001,000
Total	3,217,500	16,300	21,975,600	25,209,400	3,331,700	10,900	23,341,900	26,684,500

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 1980 TO 2011

	31 March (LPA)	31 December (LPA)	%		31 March (LPA)	31 December (LPA)	%
1980	55,082,600	50,158,800	- 5	1996	32,113,900	32,065,300	3
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

Source: HM Revenue & Customs

EXPORT MARKETS

8 EXPORTS OF SCOTCH WHISKY FOR THE CALENDAR YEARS 1980 TO 2011

	Volume	Value		Volume	Value
	LPA	£ million		LPA	£ million
1980	249,916,996	746.61	1996	256,805,902	2,278.13
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

Source: HM Revenue & Customs

9 EXPORTS OF SCOTCH WHISKY TO THE MAJOR MARKETS IN 2011

	% of Market	Malt			Blend		Total	£ Million
		Bottled	Bulk	Grain	Bottled	Bulk		
EU ex UK	34.89	15,645,560	755,255	2,331,958	90,549,785	23,020,612	132,303,170	1,448.33
France	15.16	7,052,823	57,698	941,147	31,823,249	17,598,744	57,473,661	535.42
Spain	5.52	1,047,612	159,389	293,189	18,185,758	1,261,628	20,947,576	259.21
Germany	3.69	2,569,273	262,148	15,868	8,637,445	2,489,090	13,973,824	149.56
Greece	1.23	110,239	-	2,561	4,551,615	86	4,664,501	70.49
Poland	1.20	502,042	11,143	34,725	3,958,384	61,200	4,567,494	42.16
Italy	1.17	1,151,203	256,560	211,964	2,542,986	275,866	4,438,579	46.11
Netherlands	1.11	1,370,284	434	575,975	1,894,530	373,545	4,214,768	45.34
Others	5.81	1,842,084	7,883	256,529	18,955,818	960,453	22,022,767	300.04
USA	9.60	4,681,580	61,273	38,748	24,092,855	7,524,002	36,398,458	654.90
Singapore	4.66	1,586,346	-	14,812	15,916,234	147,282	17,664,674	317.87
India	4.13	2,242,773	9,422,553	1,282	1,219,982	2,782,729	15,669,319	52.74
South Africa	3.63	857,358	1,028,411	63,243	11,492,893	323,951	13,765,856	165.51
Brazil	3.47	1,403,518	2,119,012	-	9,252,034	370,790	13,145,354	99.19
Thailand	2.68	102,965	4,777,264	4,448	5,276,162	2,408	10,163,247	50.25
Mexico	2.36	81,845	3,083	69,919	8,617,604	176,208	8,948,659	80.85
UK	6.65	3,217,500	-	16,300	21,975,600	-	25,209,400	-
Total All Markets	100.00	34,735,806	22,542,988	8,131,801	274,740,651	39,021,799	379,173,045	-

Volume figures are in LPA

Source: HM Revenue & Customs

EXPORT MARKETS

10 SUMMARY OF 2011 EXPORTS OF SCOTCH WHISKY BY MARKET GROUPS

	2011 (LPA)	2010 (LPA)	% Diff	2011 £	2010 £	% Diff
1. Europe						
EU†	132,303,170	114,740,670	15	1,448,326,333	1,264,914,448	14
Eastern Europe	3,956,298	3,225,658	23	48,982,325	43,217,299	13
Other	6,905,534	5,074,472	36	77,164,062	56,616,923	36
Total	143,165,002	123,040,800	16	1,574,472,720	1,364,748,670	15
2. Americas						
a. North America						
Canada & St Pierre-Miquelon	3,219,770	2,893,453	11	60,493,574	49,892,751	21
USA	36,398,458	31,751,444	15	654,899,296	499,254,270	31
Mexico	8,948,659	6,982,186	28	80,854,301	59,109,760	37
Sub-total	48,566,887	41,627,083	17	796,247,171	608,256,781	31
b. Central & South America	45,407,648	34,695,655	31	489,279,849	354,561,104	38
Total	93,974,535	76,322,738	23	1,285,527,020	962,817,885	34
3. Australasia						
Australia	7,436,064	7,047,751	6	69,288,231	64,598,616	7
New Zealand	613,883	636,268	-4	6,346,929	6,045,415	5
Other	271,496	165,347	64	2,836,588	1,773,241	60
Total	8,321,443	7,849,366	6	78,471,748	72,417,272	8
4. Asia						
Singapore	17,664,674	13,838,726	28	317,870,880	220,775,174	44
South Korea	8,799,650	9,790,834	-10	142,592,838	153,102,242	-7
Thailand	10,163,247	8,710,349	17	50,253,381	39,355,851	28
Other	40,038,892	31,090,690	29	401,154,979	302,931,765	32
Total	76,666,463	63,430,599	21	911,872,078	716,165,032	27
5. Africa						
South Africa	13,765,856	12,183,568	13	165,507,244	168,756,627	-2
Other	5,291,921	3,691,531	43	58,591,589	43,799,729	34
Total	19,057,777	15,875,099	20	224,098,833	212,556,356	5
6. Middle East	12,778,425	10,879,453	17	151,318,182	119,085,205	27
Total Exports	353,963,645	297,398,055	19	4,225,760,581	3,447,790,420	23

†Excludes United Kingdom Release (see table 6)

EXPORT MARKETS

11 EXPORTS OF SCOTCH WHISKY FOR 2011 AND 2010

	Volume (mLPA)		+/-		Value (£m)		+/-	
	2011	2010	mLPA	%	2011	2010	£m	%
Blended								
- bottled	252.77	217.44	35.33	16	3,224.37	2,625.64	598.73	23
- shipped in bulk	39.02	24.66	14.36	58	111.82	81.06	30.76	38
Total Blended	291.79	242.10	49.69	21	3,336.20	2,706.70	629.49	23
Malt								
- single	28.05	23.72	4.34	18	744.61	576.75	167.86	29
- blended bottled	3.47	7.77	-4.30	-55	41.21	86.08	-44.87	-52
- blended shipped in bulk	22.54	18.77	3.77	20	70.24	56.26	13.98	25
Total Malt	54.06	50.25	3.81	8	856.06	719.09	136.97	19
Single/Blended Grain								
- bottled	1.07	0.61	0.46	75	8.77	6.19	2.58	42
- shipped in bulk	7.04	4.43	2.61	59	24.74	15.81	8.92	56
Total Grain	8.12	5.05	3.07	61	33.51	22.00	11.51	52
Total Exports	353.96	297.40	56.57	19	4,225.76	3,447.79	777.97	23

Source: HM Revenue & Customs

12 TOP 20 EXPORT MARKETS FOR SCOTCH WHISKY IN 2011

Volume			Value		
Rank	Country	LPA	Rank	Country	£ Sterling
1	France	57,473,661	1	USA	654,899,296
2	USA	36,398,458	2	France	535,424,982
3	Spain	20,947,576	3	Singapore	317,870,880
4	Singapore	17,664,674	4	Spain	259,214,348
5	India	15,669,319	5	South Africa	165,507,244
6	Germany	13,973,824	6	Taiwan	155,156,832
7	South Africa	13,765,856	7	Germany	149,559,681
8	Brazil	13,145,354	8	South Korea	142,592,838
9	Thailand	10,163,247	9	Brazil	99,189,665
10	Mexico	8,948,659	10	Venezuela	83,398,587
11	South Korea	8,799,650	11	United Arab Emirates	81,999,780
12	Venezuela	7,908,031	12	Mexico	80,854,301
13	Australia	7,436,064	13	Japan	74,518,364
14	Japan	6,961,371	14	Greece	70,485,066
15	Taiwan	6,366,644	15	Australia	69,288,231
16	China	6,168,060	16	China	66,075,590
17	United Arab Emirates	5,950,518	17	Canada	60,493,574
18	Greece	4,664,501	18	Estonia	54,078,786
19	Poland	4,567,494	19	Latvia	53,551,859
20	Italy	4,438,579	20	India	52,739,959

Source: HM Revenue & Customs

EXPORT MARKETS

13 VOLUME AND VALUE OF EXPORTS OF SCOTCH WHISKY BY COUNTRY FOR YEARS 2011 AND 2010

	Volume (LPA)			Value (£)		
	2011	2010	% Diff	2011	2010	% Diff
Albania	1,096	3,066	-64	28,130	27,060	4
Algeria	182,170	73,089	149	2,801,968	1,236,859	127
Andorra	452,175	423,386	7	4,008,570	3,097,533	29
Angola	923,094	278,079	232	10,492,479	2,002,156	424
Anguilla	2,253	760	196	56,044	21,801	157
Antarctica	4,082	-	100	42,237	-	100
Antigua & Barbuda	69,798	15,085	363	989,665	248,998	297
Argentina	1,720,332	1,391,222	24	13,315,841	10,209,757	30
Armenia	26,804	28,110	-5	336,707	350,393	-4
Aruba	1,742,640	1,670,440	4	35,851,740	28,557,832	26
Australia	7,436,064	7,047,751	6	69,288,231	64,598,616	7
Austria	260,235	277,210	-6	4,325,522	4,061,424	7
Azerbaijan	16,584	-	100	648,245	-	100
Bahamas	16,409	8,543	92	410,061	292,306	40
Bahrain	831,248	623,303	33	5,480,596	4,163,701	32
Bangladesh	74,630	37,309	100	421,805	227,274	86
Barbados	26,966	24,960	8	742,250	614,907	21
Belarus	105,348	56,023	88	887,942	391,137	127
Belgium	1,443,434	990,104	46	20,619,871	13,998,663	47
Belize	46,230	3,931	1,076	1,473,909	161,387	813
Benin	52,663	40,484	30	611,971	445,057	38
Bermuda	17,054	10,870	57	304,466	177,341	72
Bhutan	28,628	8,801	225	328,039	153,228	114
Bolivia	335,082	326,084	3	5,527,424	5,738,798	-4
Bosnia & Herzegovina	40,747	27,811	47	633,313	306,281	107
Brazil	13,145,354	9,842,515	34	99,189,665	66,882,834	48
Brunei Darussalam	2,955	-	100	22,183	-	100
Bulgaria	1,817,159	1,306,469	39	18,893,649	13,470,304	40
Burkina Faso	29,272	36,105	-19	466,206	568,175	-18
Burma (Myanmar)	122,703	143,561	-15	534,097	1,706,216	-69
Cambodia	5,168	33,878	-85	50,293	122,463	-59
Cameroon	263,286	126,310	108	2,415,701	1,299,334	86
Canada	3,219,770	2,893,453	11	60,493,574	49,892,751	21
Cape Verde	48,068	23,714	103	582,949	248,278	135
Cayman Islands	3,452	3,724	-7	98,020	126,343	-22
Central African Republic	16,324	3,657	346	113,983	27,597	313
Chad	-	84,287	-100	-	1,908,281	100
Chile	2,078,210	1,567,145	33	21,897,790	13,000,320	68
China	6,168,060	5,497,391	12	66,075,590	54,687,582	21
Colombia	1,828,414	1,149,392	59	23,627,713	13,597,034	74
Congo	79,127	46,216	71	1,216,955	672,744	81
Congo Democratic Republic	94,875	38,661	145	1,724,007	695,708	148

EXPORT MARKETS

13 VOLUME AND VALUE OF EXPORTS OF SCOTCH WHISKY BY COUNTRY FOR YEARS 2011 AND 2010

	Volume (LPA)			Value (£)		
	2011	2010	% Diff	2011	2010	% Diff
Costa Rica	648,025	358,720	81	6,631,569	3,709,107	79
Croatia	192,737	183,162	5	2,161,344	1,869,709	16
Cuba	69,122	69,277	-0	722,513	625,722	15
Cyprus	779,855	804,420	-3	10,255,077	10,579,497	-3
Czech Republic	354,305	379,485	-7	3,691,094	3,680,115	0
Denmark	1,080,392	1,044,175	3	13,730,696	13,500,034	2
Djibouti	103,790	69,286	50	958,910	400,453	139
Dominica	9,906	2,568	286	161,755	34,422	370
Dominican Republic	2,417,520	1,650,392	46	23,831,235	17,484,493	36
Ecuador	1,702,782	1,242,039	37	9,841,090	6,844,289	44
Egypt	239,136	331,637	-28	4,594,452	4,439,122	3
El Salvador	60,722	51,600	18	961,738	832,883	15
Equatorial Guinea	107,851	111,862	-4	1,518,996	1,870,259	-19
Estonia	4,208,408	2,564,947	64	54,078,786	34,877,517	55
Ethiopia	147,315	121,022	22	3,074,856	2,486,012	24
Falkland Islands	991	1,820	-46	12,088	22,521	-46
Fiji	4,634	5,326	-13	53,465	66,735	-20
Finland	570,583	477,922	19	7,578,410	6,198,339	22
France	57,473,661	46,044,905	25	535,424,982	421,710,750	27
French Polynesia	27,603	21,452	29	254,765	183,864	39
Gabon	177,938	93,701	90	2,222,839	1,159,323	92
Gambia	1,003	1,021	-2	13,237	8,531	55
Georgia	180,108	155,207	16	2,551,351	1,854,856	38
Germany	13,973,824	11,860,842	18	149,559,681	126,699,650	18
Ghana	126,690	69,078	83	823,102	452,192	82
Gibraltar	47,109	44,362	6	615,960	551,975	12
Greece	4,664,501	6,257,086	-25	70,485,066	97,043,898	-27
Grenada	6,824	4,699	45	111,125	77,271	44
Guam	11,608	7,149	62	356,074	237,359	50
Guatemala	300,223	249,823	20	3,826,221	2,722,418	41
Guinea	3,804	6,894	-45	58,936	156,206	-62
Guyana	-	5,016	-100	-	31,846	-100
Haiti	137,855	61,181	125	1,259,968	703,418	79
Honduras	53,959	29,905	80	1,231,905	569,070	116
Hong Kong	1,201,960	893,072	35	22,459,155	14,419,377	56
Hungary	505,134	512,126	-1	5,369,037	5,239,207	2
Iceland	20,390	31,808	-36	344,652	402,709	-14
India	15,669,319	12,075,530	30	52,739,959	40,583,476	30
Indonesia	-	336	-100	-	2,374	-100
Iraq	1,112,466	507,864	119	10,351,791	5,081,983	104
Irish Republic	355,450	416,095	-15	3,454,512	3,779,794	-9
Israel	965,013	749,914	29	12,356,455	8,684,173	42
Italy	4,438,579	5,086,993	-13	46,106,072	47,740,816	-3

EXPORT MARKETS

13 VOLUME AND VALUE OF EXPORTS OF SCOTCH WHISKY BY COUNTRY FOR YEARS 2011 AND 2010

	Volume (LPA)			Value (£)		
	2011	2010	% Diff	2011	2010	% Diff
Ivory Coast	32,746	30,840	6	415,043	403,341	3
Jamaica	9,462	9,341	1	149,605	153,375	-2
Japan	6,961,371	4,453,747	56	74,518,364	59,550,240	25
Jordan	288,166	241,294	19	2,436,488	2,097,067	16
Kazakhstan	98,903	141,903	-30	1,170,621	2,873,915	-59
Kenya	376,578	164,557	129	2,436,288	1,404,545	73
Latvia	2,470,484	1,430,764	73	53,551,859	25,608,268	109
Lebanon	2,393,527	2,104,912	14	28,459,009	22,330,989	27
Liberia	2,076	4,758	-56	49,336	45,823	8
Lithuania	192,710	132,787	45	1,533,906	993,223	54
Luxembourg	3,970	6,385	-38	117,218	106,037	11
Macao	991	461	115	120,339	59,541	102
Macedonia FYR	-	8,094	-100	-	141,568	-100
Madagascar	21,496	5,022	328	308,013	64,099	381
Malaysia	1,040,721	949,782	10	14,099,575	12,764,101	10
Maldives	10,155	26,404	-62	172,737	305,698	-43
Mali	12,013	14,708	-18	234,604	350,766	-33
Malta	156,477	141,218	11	1,914,288	1,523,613	26
Mauritania	-	39	-100	-	1,795	-100
Mauritius	196,701	189,894	4	1,197,395	988,397	21
Mexico	8,948,659	6,982,186	28	80,854,301	59,109,760	37
Moldova	3,825	6,168	-38	70,025	107,397	-35
Mongolia	7,120	3,695	93	66,423	32,144	107
Montserrat	1,764	5,381	-67	18,176	84,760	-79
Morocco	630,196	850,186	-26	7,393,000	10,224,264	-28
Mozambique	39,420	22,079	79	482,384	326,500	48
Namibia	111,074	30,117	269	1,800,947	477,805	277
Nepal	60,256	78,035	-23	211,148	337,996	-38
Netherlands	4,214,768	3,062,292	38	45,340,275	35,494,933	28
Netherlands Antilles	947,782	808,678	17	18,481,583	13,741,879	34
New Caledonia	222,934	131,420	70	2,138,630	1,285,283	66
New Zealand	613,883	636,268	-4	6,346,929	6,045,415	5
Nicaragua	9,553	16,280	-41	102,132	203,414	-50
Niger	-	14,380	-100	-	287,967	-100
Nigeria	689,318	436,184	58	5,116,533	5,084,952	1
Niue Island	180	-	100	7,800	-	100
Norway	376,231	331,499	13	6,535,150	5,065,174	29
Oman	779,797	733,749	6	5,093,138	3,824,861	33
Panama	3,121,646	2,735,662	14	48,046,346	44,669,305	8
Papua New Guinea	4,200	-	100	22,720	-	100
Paraguay	1,638,022	1,350,760	21	24,635,298	17,494,823	41
Peru	1,302,365	797,443	63	17,797,675	9,052,737	97
Philippines	1,277,910	1,168,725	9	3,176,404	3,058,524	4

EXPORT MARKETS

13 VOLUME AND VALUE OF EXPORTS OF SCOTCH WHISKY BY COUNTRY FOR YEARS 2011 AND 2010

	Volume (LPA)			Value (£)		
	2011	2010	% Diff	2011	2010	% Diff
Poland	4,567,494	2,915,923	57	42,155,019	29,446,255	43
Portugal	3,844,909	3,795,580	1	45,289,458	45,761,782	-1
Qatar	342,391	338,817	1	3,860,338	3,253,204	19
Romania	1,232,508	1,258,450	-2	14,369,789	14,585,254	-1
Russia	2,969,370	2,368,169	25	35,731,780	31,415,147	14
Sao Tome & Principe	72	-	100	18,745	-	100
Saudi Arabia	4,918	5,063	-3	25,270	96,654	-74
Senegal	30,959	11,045	180	619,796	168,014	269
Serbia	176,334	138,610	27	1,699,285	1,352,962	26
Seychelles	42,415	19,707	115	559,765	259,938	115
Sierra Leone	8,356	5,063	65	156,126	76,254	105
Singapore	17,664,674	13,838,726	28	317,870,880	220,775,174	44
Slovakia	76,303	56,101	36	651,654	593,775	10
Slovenia	226,948	259,418	-13	2,591,730	2,747,994	-6
South Africa	13,765,856	12,183,568	13	165,507,244	168,756,627	-2
South Georgia & Southern Sandwich	1,980	211	838	18,925	947	1,898
South Korea	8,799,650	9,790,834	-10	142,592,838	153,102,242	-7
Spain	20,947,576	21,046,190	-0	259,214,348	268,390,176	-3
Sri Lanka	517,285	381,870	35	7,092,379	5,354,655	32
St Christopher (St Kitts) & Nevis	10,537	7,037	50	132,660	127,646	4
St Helena	-	5,910	-100	-	96,081	-100
St Lucia	70,140	47,489	48	603,106	274,771	119
St Vincent	3,551	2,538	40	83,556	53,326	57
Surinam	378,877	300,462	26	6,593,115	4,132,685	60
Swaziland	92,330	36,331	154	433,497	170,795	154
Sweden	2,443,503	2,612,783	-6	38,024,334	37,083,130	3
Switzerland	1,894,278	1,959,544	-3	29,217,137	25,905,249	13
Syria	110,381	173,949	-37	1,255,317	2,131,597	-41
Taiwan	6,366,644	5,012,716	27	155,156,832	107,380,943	44
Tanzania	213,359	143,627	49	1,564,433	1,077,327	45
Thailand	10,163,247	8,710,349	17	50,253,381	39,355,851	28
Togo	38,604	63,585	-39	520,901	785,325	-34
Trinidad & Tobago	487,027	407,475	20	8,319,855	6,376,178	30
Tunisia	21,551	18,921	14	408,804	289,233	41
Turkey	4,115,351	2,283,873	80	36,442,593	21,594,283	69
Turks & Caicos Islands	2,333	944	147	93,722	39,344	138
Uganda	108,741	20,836	422	594,011	198,918	199
Ukraine	140,952	109,335	29	3,008,036	2,526,874	19
United Arab Emirates	5,950,518	5,400,588	10	81,999,780	67,420,976	22
Uruguay	3,008,587	2,745,361	10	27,399,601	21,173,794	29
US Virgin Islands	56,547	41,363	37	1,148,079	662,967	73

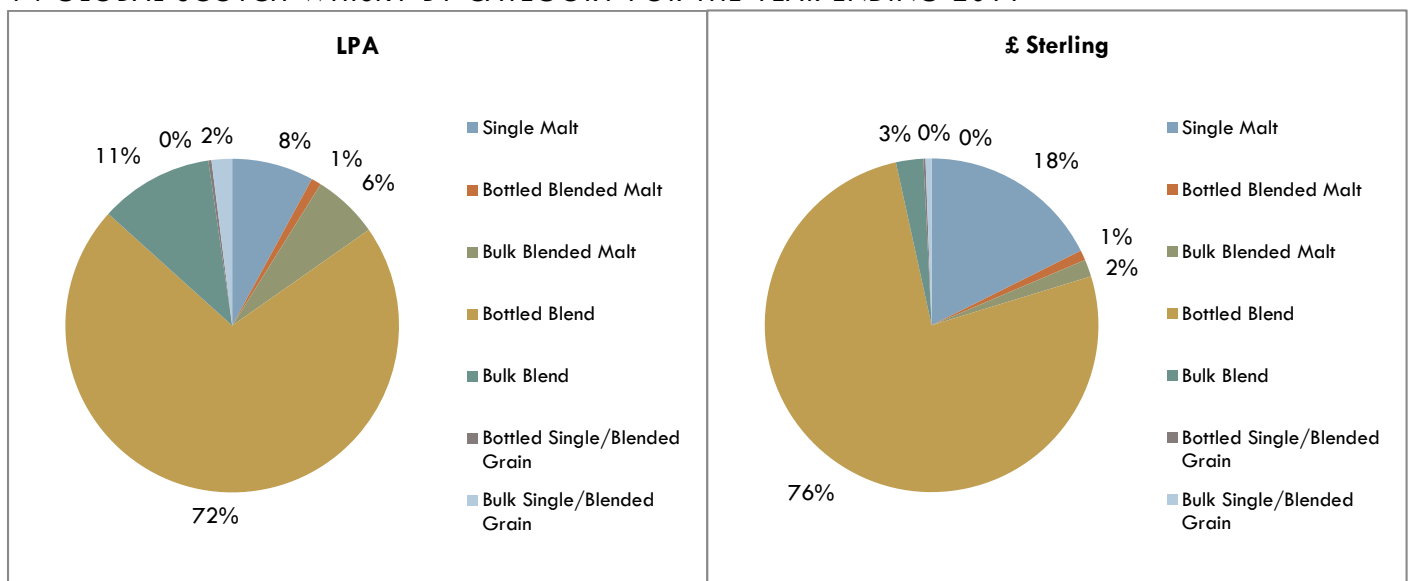
EXPORT MARKETS

13 VOLUME AND VALUE OF EXPORTS OF SCOTCH WHISKY BY COUNTRY FOR YEARS 2011 AND 2010

	Volume (LPA)			Value (£)		
	2011	2010	% Diff	2011	2010	% Diff
USA	36,398,458	31,751,444	15	654,899,296	499,254,270	31
Uzbekistan	3,490	-	100	55,546	-	100
Venezuela	7,908,031	5,668,777	40	83,398,587	62,885,133	33
Vietnam	523,016	325,377	61	3,909,657	2,185,933	79
Virgin Islands (British)	5,239	8,742	-40	139,796	146,902	-5
Wallis & Futuna Islands	337	-	100	3,134	-	100
Zambia	19,731	14,000	41	471,737	336,873	40
Zimbabwe	7,779	34,639	-78	118,684	604,430	-80
Total	353,963,645	297,398,055	19	4,225,760,581	3,447,790,420	23

Source: HM Revenue & Customs

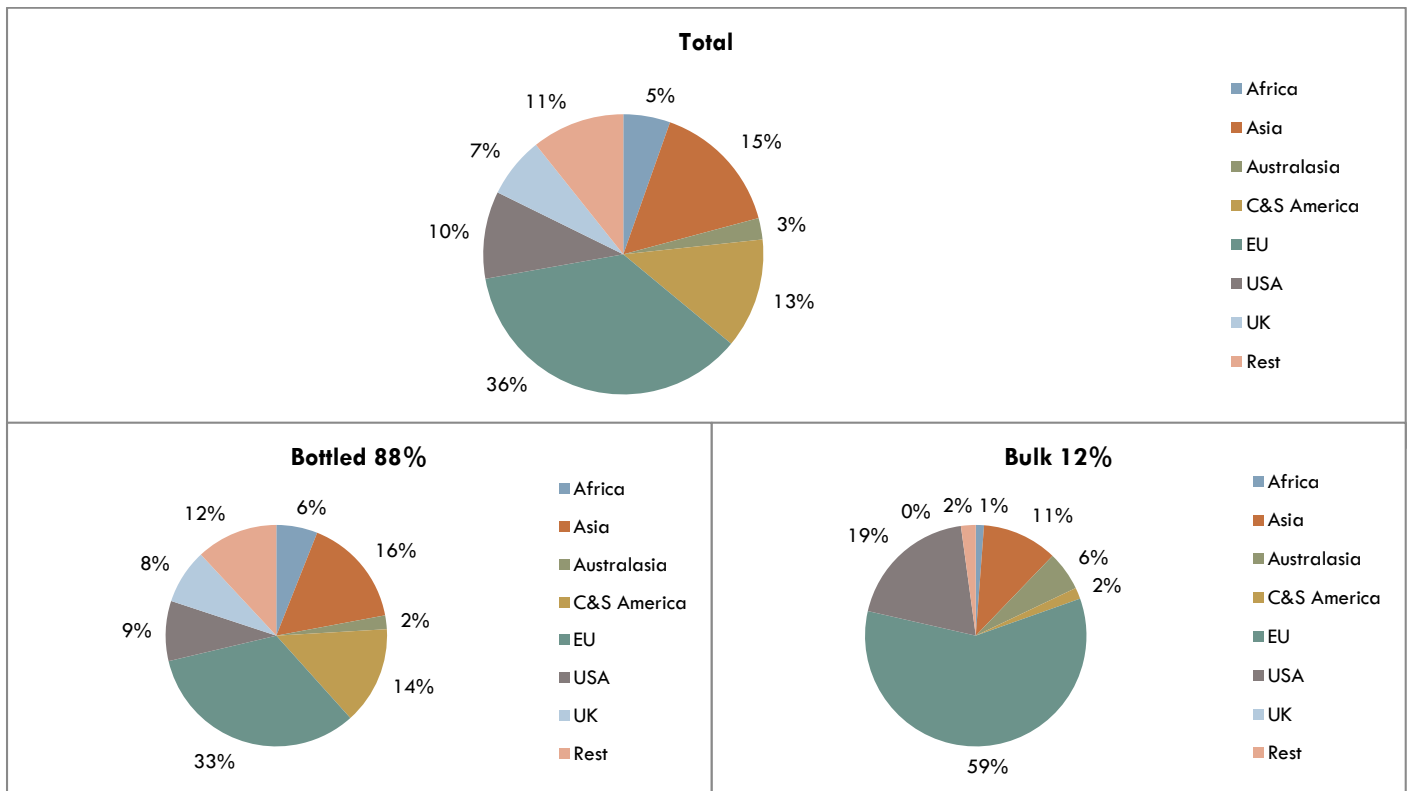
14 GLOBAL SCOTCH WHISKY BY CATEGORY FOR THE YEAR ENDING 2011



Source: HM Revenue & Customs

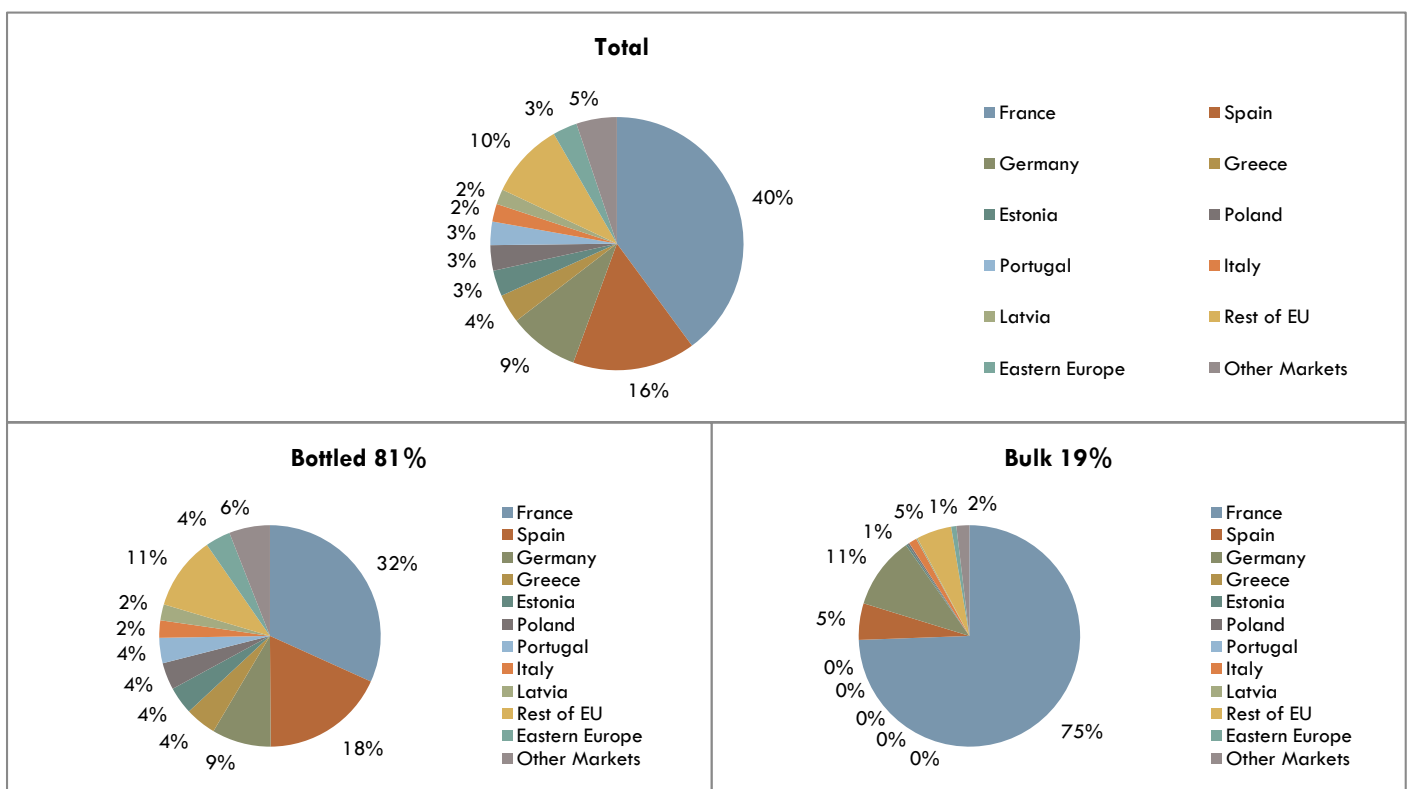
EXPORT MARKETS

15 GEOGRAPHIC DISTRIBUTION OF 2011 WORLD EXPORTS OF BLENDED SCOTCH WHISKY



Source: HM Revenue & Customs

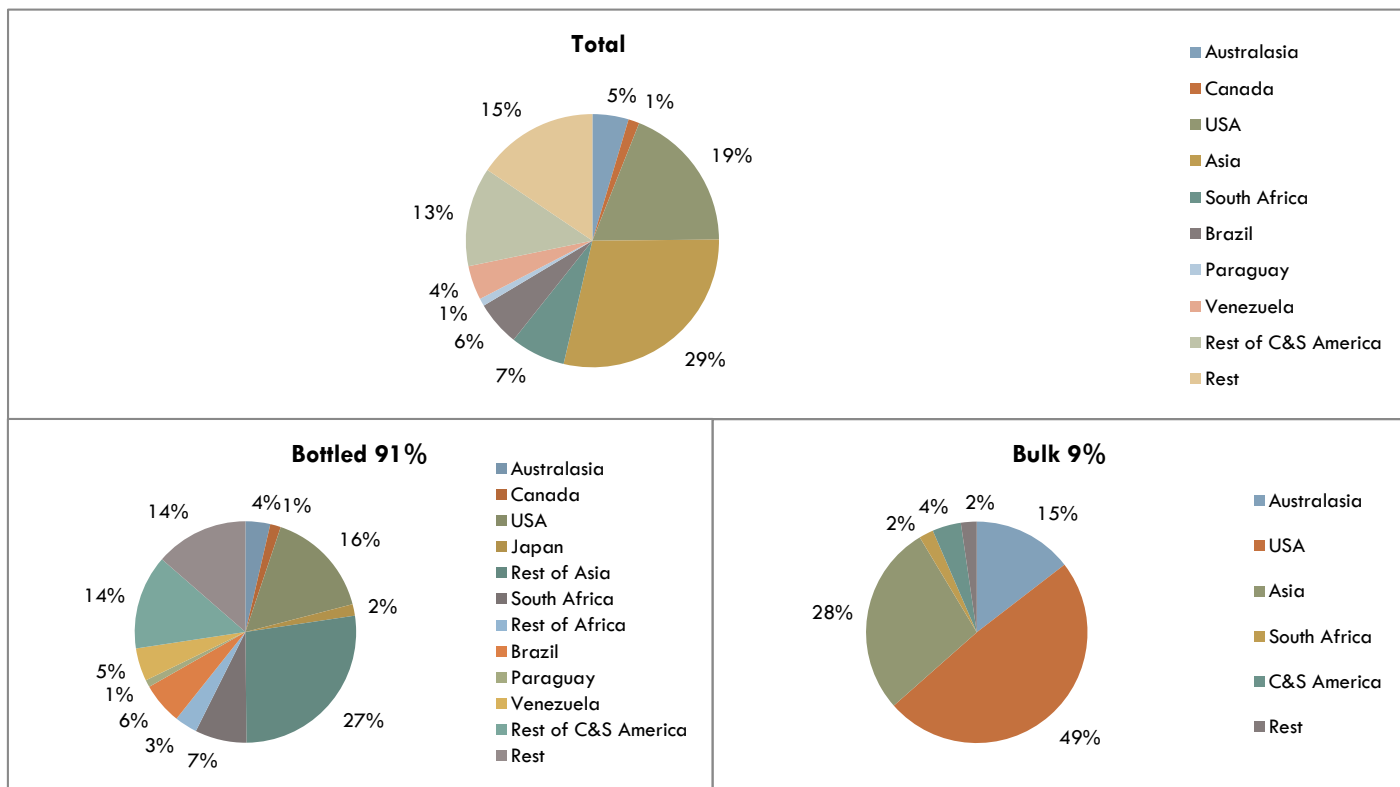
16 MARKET DISTRIBUTION OF 2011 EXPORTS OF BLENDED SCOTCH WHISKY IN CONTINENTAL EUROPE



Source: HM Revenue & Customs

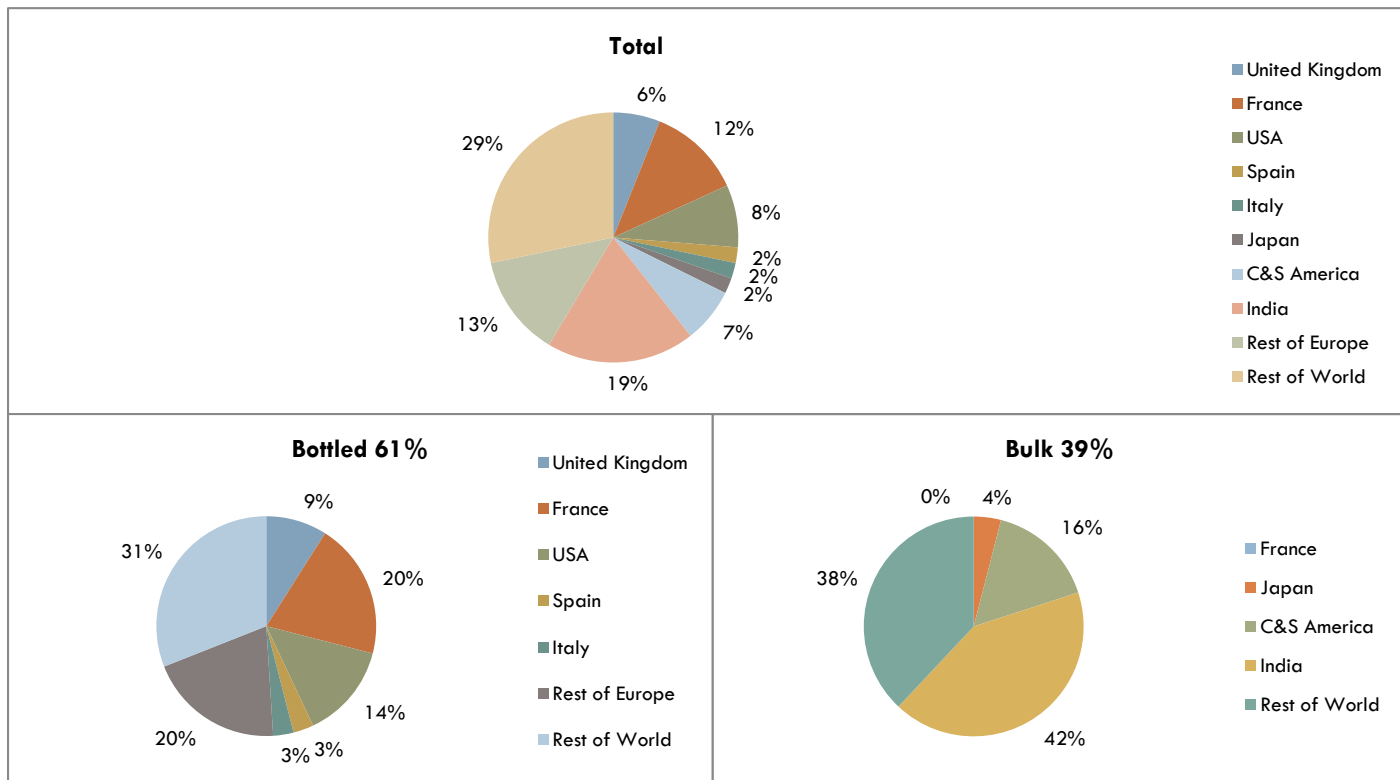
EXPORT MARKETS

17 MARKET DISTRIBUTION OF 2011 SALES OF BLENDED SCOTCH WHISKY IN 'REST OF WORLD'



Source: HM Revenue & Customs

18 MARKET DISTRIBUTION OF 2011 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					

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 and 21 March 2012 from 26 March 2012.

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

	ABV	1997	1998	1999	2000/1/2	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012
Beer	3.52%	1:1.81	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
Table Wine	12.50%	1:1.74	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

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

	ABV	2008	2009	2010	2011	2012
284ml (½ pint) Beer	3.52%	16.14	16.46	17.31p	18.56p	19.51p
125ml Table Wine	12.50%	15.54	17.12	18.00p	19.34p	20.27p
25ml Scotch Whisky	40.00%	21.35	22.64	23.80p	25.52p	26.81p

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