



Statistical Report 2008



Scotch Whisky Association



The Statistical Report presents information about the activities of the Scotch Whisky industry during 2008.

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 and Customs and The Scotch Whisky Association Databank.

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 1995 allowing for the first time Scotch Whisky categories to be separately identified. The codes do not include Northern Ireland whiskies or imported whiskies.

2208.30.32	Bottled Malt	2208.30.38	Bulk Malt
2208.30.52	Bottled Blend	2208.30.58	Bulk Blend
2208.30.72	Bottled Grain	2208.30.78	Bulk Grain

The Association recommends that the following Combined Nomenclature codes be used to report new make spirit under three years old:

2207.10.00	Undenatured ethyl alcohol of an alcoholic strength by volume of 80% or higher.
2208.90.91	Undenatured ethyl alcohol of an alcoholic strength by volume of less than 80% vol, in containers holding 2 litres or less
2208.90.99	Undenatured ethyl alcohol of an alcoholic strength by volume of less than 80% vol, in containers holding more than 2 litres.

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Production

1 Scotch Whisky Production 1980 - 2008

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

NOTE: Figures for 1991 to 2008 compiled from The Scotch Whisky Association Databank

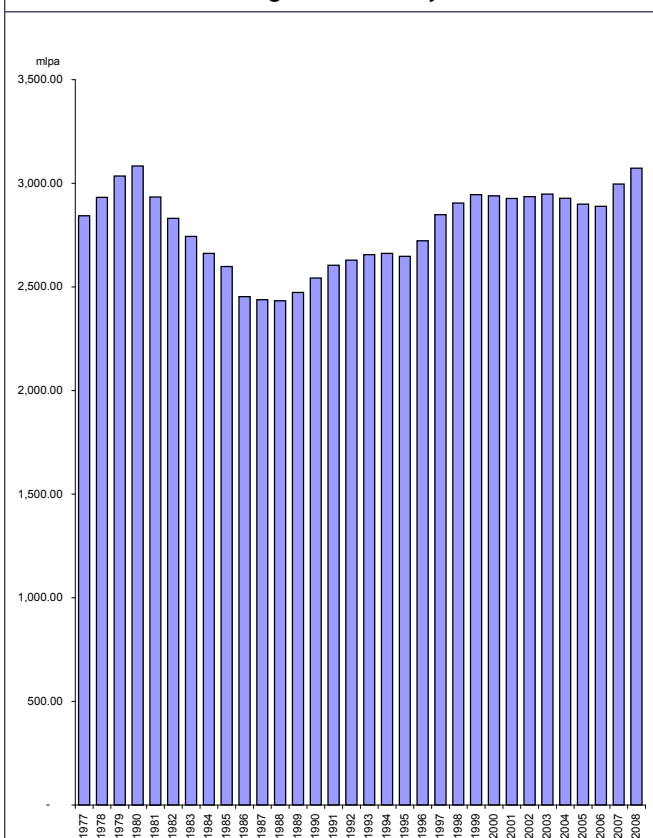
Stock

2 Stocks of Whisky in bonded warehouses as at 31 December 1977 - 2008

	Million LPA		Million LPA
1977	2,843.50	2001	2,926.39
1978	2,932.24	2002	2,935.16
1979	3,034.66	2003	2,947.75
1980	3,083.51	2004	2,927.27
1981	2,933.64	2005	2,899.32
1982	2,830.46	2006	2,889.35
1983	2,743.62	2007	2,996.02
1984	2,661.97	2008	3,073.21
1985	2,598.26		
1986	2,453.01		
1987	2,438.32		
1988	2,433.20		
1989	2,473.10		
1990	2,543.20		
1991	2,604.40		
1992	2,628.76		
1993	2,655.39		
1994	2,661.67		
1995	2,647.38		
1996	2,722.28		
1997	2,848.16		
1998	2,904.60		
1999	2,945.58		
2000	2,938.78		

NOTE: Stock for 1991 to 2008 compiled from The Scotch Whisky Association Databank

3 Stocks of maturing Scotch Whisky 1977 - 2008



NOTE: Stock for 1991 to 2008 compiled from The Scotch Whisky Association Databank

4 Changes in bulk stocks by type and year produced

	Stocks as at December 2008	Stocks as at December 2007	Increase/ Decrease
BULK MALT WHISKY (OLA)			
Produced in 2008	230,881,415	-	230,881,415
Produced in 2007	197,302,330	199,126,199	-1,823,869
Produced in 2006	164,528,784	169,729,507	-5,200,723
Produced in 2005	135,520,317	155,936,397	-20,416,080
Produced in 2004	108,470,741	129,453,562	-20,982,821
Produced in 2003	75,381,484	110,970,786	-35,589,302
Produced in 2002	62,687,867	82,939,026	-20,251,159
Produced in 2001	56,630,491	58,015,596	-1,385,105
Produced in 2000	60,077,112	62,351,488	-2,274,376
Produced in 1999	70,950,925	72,716,038	-1,765,113
Produced in 1998	82,417,182	85,704,454	-3,287,272
Produced pre 1998	281,216,249	350,840,401	-69,624,152
TOTAL	1,526,064,897	1,477,783,454	48,281,443
BULK GRAIN WHISKY (OLA)			
Produced in 2008	288,234,468	-	288,234,468
Produced in 2007	282,299,499	287,196,761	-4,897,262
Produced in 2006	247,062,160	256,144,160	-9,082,000
Produced in 2005	153,324,922	227,451,580	-74,126,658
Produced in 2004	84,143,874	155,936,563	-71,792,689
Produced in 2003	63,094,946	92,094,957	-29,000,011
Produced in 2002	38,635,469	50,173,432	-11,537,963
Produced in 2001	35,011,182	36,956,622	-1,945,440
Produced in 2000	45,251,163	46,072,806	-821,643
Produced in 1999	61,823,574	63,014,051	-1,190,477
Produced in 1998	65,328,286	66,322,742	-994,456
Produced pre 1998	182,933,659	236,879,268	-53,945,609
TOTAL	1,547,143,202	1,518,242,942	28,900,260
BULK MALT AND GRAIN WHISKY (OLA)			
Total bulk malt	1,526,064,897	1,477,783,454	48,281,443
Total bulk grain	1,547,143,202	1,518,242,942	28,900,260
TOTAL	3,073,208,099	2,996,026,396	77,181,703

NOTES:

1. The criterion for gathering stock figures changed in 1994. From 1994 figures now include stock owned by Non-Members of the Association but stored in SWA Members' Warehouses
2. Stock compiled from The Scotch Whisky Association Databank.

Employment

5 Numbers employed by member companies by region as at September 2008 and September 2007

Region	2008	2007	%change
Highland	473	469	+1
Grampian	1,301	1,242	+5
Strathclyde	4,928	5,161	-5
Lothian	1,054	1,071	-2
Central & Fife	1,613	1,695	-5
Tayside	188	175	+7
Rest of UK	235	201	+17
Total	9,792	10,014	-2

NOTE:

This information is compiled from Databank Returns completed by member companies of the Association and relates only to those employees directly employed within the Scotch Whisky Industry.

UK Market

6 Monthly totals of Scotch Whisky released for consumption in the UK for 2008 and 2007

	2008 (LPA)				2007 (LPA)			
	Malt	Grain	Blended	Total	Malt	Grain	Blended	Total
January	182,700	1,100	1,345,600	1,529,400	272,400	600	1,634,400	1,907,400
February	154,700	500	1,578,300	1,733,500	118,000	1,400	1,445,800	1,565,200
March	348,200	600	3,063,000	3,411,800	170,200	3,200	1,986,300	2,159,700
April	116,200	400	932,800	1,049,400	161,000	1,600	1,727,300	1,889,900
May	285,100	1,100	2,158,000	2,444,200	196,300	800	1,944,700	2,141,800
June	204,300	1,000	1,716,900	1,922,200	288,900	700	2,002,100	2,291,700
July	162,100	800	1,541,300	1,704,200	208,200	700	1,645,200	1,854,100
August	188,100	600	2,114,600	2,303,300	241,400	800	2,475,300	2,717,500
September	193,900	800	1,930,200	2,124,900	222,000	1,000	1,811,400	2,034,400
October	371,100	800	3,139,600	3,511,500	269,300	800	2,362,800	2,632,900
November	621,700	1,700	4,952,400	5,575,800	553,900	1,200	3,538,100	4,093,200
December	426,400	700	1,200,200	1,627,300	468,200	1,300	2,834,100	3,303,600
TOTAL	3,254,500	10,100	25,672,900	28,937,500	3,169,800	14,100	25,407,500	28,591,400

Source: HM Customs & Excise

7 Annual totals of Scotch Whisky released for UK consumption for the years ending 31 March and 31 December 1975 - 2008

	31 March (LPA)	31 December (LPA)	†%		31 March (LPA)	31 December (LPA)	†%
1975	44,099,400	42,410,100	-6	1992	37,273,400	35,785,800	-6
1976	43,219,700	48,438,300	+14	1993	36,034,700	37,548,100	+5
1977	47,265,300	40,248,500	-17	1994	35,925,800	38,344,600	+2
1978	43,149,700	48,812,000	+21	1995	36,988,100	31,007,100	-19
1979	54,178,400	52,536,300	+8	1996	32,113,900	32,065,300	+3
1980	55,082,600	50,158,800	-5	1997	31,936,100	31,198,400	-3
1981	49,727,800	47,710,800	-5	1998	29,899,000	28,863,800	-7
1982	45,601,200	44,751,100	-6	1999	30,368,700	32,276,100	+12
1983	43,137,400	44,479,800	-1	2000	32,150,300	31,382,200	-3
1984	45,369,700	43,358,800	-3	2001	31,732,000	32,079,300	+2
1985	43,130,800	46,145,700	+6	2002	32,060,600	32,068,600	0
1986	45,936,800	45,636,000	-1	2003	32,585,400	31,829,900	-1
1987	41,351,000	44,599,000	-2	2004	31,906,400	31,929,500	0
1988	44,859,600	45,181,300	+1	2005	31,399,800	30,088,300	-5
1989	42,920,100	43,028,200	-5	2006	29,631,400	28,259,200	-6
1990	42,448,400	41,341,500	-4	2007	28,830,000	28,591,400	+1
1991	42,079,300	38,261,600	-7	2008	29,633,800	28,937,500	+1

†% increase/decrease on previous December

Source: HM Customs & Excise

Export Market

8 Exports of Scotch Whisky for the calendar years 1949 - 2008

	Volume LPA	Value £ Million		Volume LPA	Value £ Million		Volume LPA	Value £ Million
1949	22,113,245	18.74	1969	136,048,428	167.49	1989	242,491,750	1,469.46
1950	25,143,756	26.27	1970	160,914,668	194.06	1990	238,304,608	1,712.48
1951	27,576,930	29.59	1971	182,500,576	226.94	1991	227,748,446	1,833.89
1952	29,895,863	33.03	1972	178,411,396	227.91	1992	231,272,367	1,958.88
1953	34,260,394	37.77	1973	203,576,878	259.99	1993	256,872,038	2,093.85
1954	35,527,776	39.05	1974	227,336,065	326.39	1994	252,209,071	2,191.29
1955	39,860,191	43.67	1975	234,274,309	366.62	1995	262,078,484	2,277.05
1956	42,660,632	47.80	1976	238,302,745	436.68	1996	256,805,902	2,278.13
1957	46,469,638	52.14	1977	243,632,634	512.62	1997	276,937,370	2,394.33
1958	50,137,930	56.03	1978	274,072,934	661.22	1998	254,042,920	2,030.41
1959	56,276,163	61.85	1979	262,420,711	707.41	1999	266,630,395	2,093.69
1960	60,066,794	65.56	1980	249,916,996	746.61	2000	277,096,784	2,156.71
1961	69,609,847	74.43	1981†	244,239,375	784.75	2001	283,632,089	2,295.29
1962	78,030,884	80.86	1982	251,277,064	871.60	2002	263,772,741	2,285.29
1963	82,450,052	84.83	1983	227,844,492	858.09	2003	273,269,419	2,375.43
1964	90,875,252	92.29	1984	231,286,678	931.38	2004	267,300,351	2,263.04
1965	102,935,642	107.58	1985	225,894,432	993.94	2005	277,904,381	2,370.34
1966	107,944,218	120.39	1986	236,188,393	1,070.13	2006	294,502,609	2,478.63
1967	111,962,983	122.39	1987	240,174,162	1,135.51	2007	318,436,324	2,824.55
1968	153,508,118	176.55	1988	245,977,491	1,288.79	2008	302,367,100	3,056.88

NOTE:

† Estimated by HM Customs & Excise

9 Exports of Scotch Whisky to the major markets in 2008

	% of Market	Malt		Grain	Blended		Total	£ Million
		Bottle	Bulk		Bottle	Bulk		
EU excl United Kingdom	37.31	9,672,414	2,401,264	1,817,607	98,161,167	11,541,033	123,593,485	1,274.97
France	13.50	3,008,271	1,839,912	859,805	30,919,575	8,091,800	44,719,363	358.52
Spain	8.65	1,101,056	226,095	444,190	26,666,992	233,778	28,672,111	333.23
Germany	3.33	1,860,093	226,248	151,627	7,922,121	864,085	11,024,174	110.66
Greece	2.50	221,630	-	-	7,960,989	107,185	8,289,804	113.51
Italy	1.37	1,242,986	365	291,912	2,914,162	93,190	4,542,615	42.50
Portugal	1.35	132,853	8	-	4,049,237	280,363	4,462,461	58.42
Netherlands	0.98	599,571	63,136	1,845	1,931,367	639,933	3,235,852	33.98
Others	5.63	1,505,954	45,500	68,228	15,796,724	1,230,699	18,647,105	224.15
USA	9.05	3,817,138	44,181	1,053	18,232,150	7,888,772	29,983,294	371.41
Singapore	4.13	1,115,761	38,800	24	12,502,471	42,083	13,699,139	184.51
South Africa	3.77	242,576	823,460	1,014,640	9,943,336	463,404	12,487,416	101.42
South Korea	3.47	177,987	66,346	-	8,016,265	3,227,010	11,487,608	148.35
Thailand	2.78	117,378	1,219,190	-	7,871,170	302	9,208,040	33.10
Australia	2.50	340,648	5,518	-	5,620,456	2,309,652	8,276,274	60.94
India	2.39	100,219	4,274,501	513,497	1,662,016	1,355,555	7,905,788	31.93
United Kingdom	8.73	3,254,500	-	10,100	25,672,900	-	28,937,500	N/A
TOTAL ALL MARKETS²	100.00	23,418,228	11,206,153	3,515,653	263,079,881	30,084,685	331,304,600	N/A

NOTE:

1. Volume figures in million lpa

2. Sales = HM Customs & Excise Export Statistics and UK Home Clearances

10 Summary of 2008 exports of Scotch Whisky by market groups

	2008 LPA Million	2007 LPA Million	Volume % diff	2008 £ Million	2007 £ Million	Value % diff
1. Europe						
EU†	123.59	131.50	-6	1,274.97	1,092.63	+17
Eastern Europe	2.82	2.60	8	38.71	34.88	+11
Other	5.73	5.68	1	57.91	49.67	+17
TOTAL	132.15	139.77	-5	1,371.58	1,177.17	+17
2. Americas						
a. North America	38.00	40.37	-6	451.37	482.17	-6
Canada and St Pierre - Miquelon	3.18	3.39	-6	46.37	41.84	+11
USA	29.98	33.80	-11	371.41	419.17	-11
Mexico	4.84	3.19	52	33.60	21.15	+59
SUB-TOTAL	38.00	40.37	-6	451.37	482.17	-6
b. Central & South America	38.02	43.63	-13	330.99	338.99	-2
TOTAL	76.02	84.00	-9	782.36	821.15	-5
3. Australasia						
Australia	8.28	8.28	0	60.94	46.14	+32
New Zealand	0.62	0.62	0	4.83	3.98	+21
Other	0.30	0.27	12	2.50	2.27	+10
TOTAL	9.19	9.16	0	68.27	52.38	+30
4. Asia						
Singapore	13.70	13.09	5	184.51	158.14	+17
South Korea	11.49	11.22	2	148.35	139.35	+6
Thailand	9.21	11.11	-17	33.10	37.82	-12
Other	23.91	24.54	-3	231.87	235.21	-1
TOTAL	58.30	59.97	-3	597.84	570.52	+5
5. Africa						
South Africa	12.49	12.05	4	101.42	90.94	+12
Other	3.70	4.20	-12	40.37	37.84	+7
TOTAL	16.19	16.26	-0	141.79	128.78	+10
6. Middle East	10.51	9.28	13	95.03	74.56	+27
TOTAL EXPORTS	302.37	318.44	-5	3,056.88	2,824.56	+8

NOTES: †Excludes United Kingdom Release (see Table 6)

11 Exports of Scotch Whisky for 2008 and 2007

	2008 mlpa	2007 mlpa	Increase/Decrease mlpa %		2008 £m	2007 £m	Increase/Decrease £m %	
Blended - bottled	237.41	244.66	-7	-3	2,427.64	2,223.84	204	9
- shipped in bulk	30.08	37.76	-8	-20	92.61	102.62	-10	-10
BLENDING TOTAL	267.49	282.43	-15	-5	2,520.25	2,326.45	194	8
Malt - bottled	20.16	20.08	0	0	496.44	456.77	40	9
- shipped in bulk	11.21	7.39	4	52	31.48	26.76	5	18
MALT TOTAL	31.37	27.47	4	14	527.92	483.53	44	9
Grain	3.51	8.54	-5	-59	8.72	14.58	-6	-40
TOTAL EXPORTS	302.37	318.44	-16	-5	3,056.88	2,824.56	232	8

12 Top 20 export markets for Scotch Whisky in 2008

Volume Rank	Country	lpa	Value Rank	Country	£ sterling
1	France	44,179,363	1	USA	371,406,667
2	USA	29,983,294	2	France	358,515,251
3	Spain	28,672,111	3	Spain	333,230,392
4	Singapore	13,699,139	4	Singapore	184,512,797
5	South Africa	12,487,416	5	South Korea	148,352,542
6	South Korea	11,487,608	6	Greece	113,506,962
7	Germany	11,024,174	7	Germany	110,663,594
8	Thailand	9,208,040	8	South Africa	101,417,891
9	Greece	8,289,804	9	Taiwan	74,435,928
10	Australia	8,276,274	10	Venezuela	66,984,399
11	India	7,905,788	11	Australia	60,940,471
12	Brazil	7,439,928	12	Portugal	58,421,057
13	Venezuela	6,708,074	13	Canada	46,369,538
14	China	5,087,141	14	Panama	45,155,901
15	Mexico	4,836,820	15	China	44,303,148
16	Italy	4,542,615	16	Italy	42,496,369
17	Portugal	4,462,461	17	Estonia	41,807,896
18	Taiwan	3,671,098	18	Brazil	41,369,951
19	Dubai	3,479,851	19	Japan	40,754,905
20	Panama	3,346,170	20	Dubai	40,300,329

13 Volume and value of exports of Scotch Whisky by country for the years ending 31 December 2008 and 2007

	Volume LPA			Vol. % Diff	Value £			Value % Diff
	2008	2007			2008	2007		
Abu Dhabi	397,291	279,654	+42	2,312,874	1,682,973	+37		
Albania	44,264	0	-	504,311	0	-		
Algeria	89,398	140,142	-36	1,172,217	1,807,684	-35		
Andorra	491,409	346,807	+42	3,153,020	2,329,493	+35		
Angola	371,261	327,418	+13	2,297,164	1,628,066	+41		
Anguilla	10,748	40,090	-73	140,831	419,898	-66		
Antigua & Barbuda	56,670	67,727	-16	777,122	651,226	+19		
Argentina	1,620,945	1,618,745	0	8,180,865	6,868,095	+19		
Armenia	6,317	972	+550	85,431	36,675	+133		
Aruba	1,717,285	1,953,878	-12	21,252,655	22,315,066	-5		
Australia	8,276,274	8,283,773	0	60,940,471	46,135,335	+32		
Austria	238,296	236,376	+1	2,951,886	2,417,767	+22		
Azerbaijan	12,387	1	+1,238,600	548,986	696	+78,777		
Bahamas	10,955	14,788	-26	205,860	274,573	-25		
Bahrain	894,581	731,979	+22	5,000,628	3,546,622	+41		
Bangladesh	86,969	17,103	+409	410,132	71,436	+474		
Barbados	41,274	39,130	+5	891,723	670,195	+33		
Belarus	2,966	22,644	-87	37,613	309,910	-88		
Belgium	1,362,935	1,655,486	-18	13,235,476	11,329,452	+17		
Belize	100,265	163,416	-39	2,674,693	2,979,534	-10		
Benin	86,509	43,365	+99	694,395	487,208	+43		
Bermuda	15,205	16,266	-7	216,161	220,450	-2		
Bhutan	6,814	8,934	-24	106,000	135,745	-22		
Bolivia	394,350	277,279	+42	4,540,776	2,575,717	+76		
Bosnia & Herzegovina	65,492	55,601	+18	667,148	419,101	+59		
Botswana	0	9,752	-	0	81,032	-		
Brazil	7,439,928	8,494,499	-12	41,369,951	37,661,552	+10		
Brunei Darussalam	168	3,985	-96	1,192	12,584	-91		
Bulgaria	1,630,634	1,643,517	-1	16,109,459	11,866,647	+36		
Burkina Faso	11,264	8,282	+36	127,451	85,468	+49		
Burma (Myanmar)	191,822	196,750	-3	827,400	669,274	+24		
Burundi	0	32,703	-	0	137,071	-		
Cambodia	246	0	-	5,690	0	-		
Cameroon	68,153	68,846	-1	533,583	382,895	+39		
Canada	3,177,845	3,385,442	-6	46,369,538	41,839,180	+11		
Cape Verde	51,614	53,417	-3	537,749	523,528	+3		
Cayman Islands	6,206	5,850	+6	212,783	139,497	+53		
Central African Republic	3,741	3,842	-3	24,334	23,897	+2		
Chad	45,513	4,257	+969	583,774	26,800	+2,078		
Chile	1,141,228	1,369,996	-17	7,540,039	9,054,501	-17		
China	5,087,141	4,779,215	+6	44,303,148	42,086,359	+5		
Cocos Islands	2,528	0	-	33,884	0	-		
Colombia	1,592,476	1,711,733	-7	16,661,007	17,086,871	-2		
Congo	45,559	60,923	-25	597,564	582,964	+3		
Congo Democratic Republic	76,116	72,554	+5	1,055,118	817,207	+29		
Costa Rica	760,515	776,977	-2	4,853,456	4,276,552	+13		
Croatia	229,720	185,218	+24	1,865,364	1,237,320	+51		
Cuba	79,402	83,738	-5	800,080	541,128	+48		
Cyprus	870,619	723,374	+20	10,738,011	8,943,042	+20		
Czech Republic	438,155	445,630	-2	4,259,784	3,495,945	+22		
Denmark	989,286	1,510,411	-35	11,478,109	13,915,293	-18		
Djibouti	139,232	172,994	-20	1,337,424	1,369,670	-2		
Dominica	15,080	9,892	+52	159,686	92,166	+73		
Dominican Republic	1,987,724	1,940,968	+2	15,257,644	10,757,602	+42		
Dubai	3,479,851	3,059,356	+14	40,300,329	29,898,614	+35		

13 Volume and value of exports of Scotch Whisky by country for the years ending 31 December 2008 and 2007

	Volume LPA		Vol. % Diff	Value £		Value % Diff
	2008	2007		2008	2007	
Ecuador	2,603,037	2,147,987	+21	12,134,946	9,314,476	+30
Egypt	365,331	423,224	-14	5,878,301	5,437,016	+8
El Salvador	49,531	57,491	-14	794,636	707,132	+12
Equatorial Guinea	117,738	157,659	-25	1,196,626	2,233,852	-46
Estonia	2,344,727	2,163,206	+8	41,807,896	34,329,600	+22
Ethiopia	106,917	252,287	-58	1,481,920	2,508,559	-41
Falkland Islands	1,791	2,028	-12	24,717	26,752	-8
Fiji	4,100	641	+540	28,555	7,033	+306
Finland	573,163	629,341	-9	6,396,561	5,879,049	+9
France	44,719,363	48,501,777	-8	358,515,251	294,965,639	+22
French Polynesia	53,137	40,182	+32	385,926	280,302	+38
Gabon	120,088	144,127	-17	1,267,651	1,065,865	+19
Gambia	602	490	+23	10,026	7,618	+32
Georgia	135,208	131,762	+3	1,885,612	1,265,611	+49
Germany	11,024,174	10,859,337	+2	110,663,594	97,126,499	+14
Ghana	64,913	175,567	-63	1,073,336	1,073,860	-0
Gibraltar	48,932	44,823	+9	576,670	548,999	+5
Greece	8,289,804	8,677,245	-4	113,506,962	103,580,131	+10
Grenada	21,575	22,037	-2	252,792	158,152	+60
Guam	13,174	25,697	-49	377,140	532,876	-29
Guatemala	310,769	285,419	+9	3,682,261	2,314,492	+59
Guinea	1,400	6,029	-77	18,207	78,737	-77
Guinea-Bissau	387	914	-58	2,510	6,291	-60
Guyana	192	2,458	-92	960	72,333	-99
Haiti	50,608	49,677	+2	463,122	427,869	+8
Honduras	11,571	39,426	-71	178,434	462,444	-61
Hong Kong	1,048,933	1,171,316	-10	16,015,173	16,495,276	-3
Hungary	722,534	612,141	+18	6,612,725	4,563,254	+45
Iceland	21,259	29,721	-28	263,894	388,377	-32
India	7,905,788	7,590,431	+4	31,925,855	33,187,972	-4
Indonesia	0	289	-	-	5,867	-
Iraq	402,752	160,175	+151	2,934,479	1,043,675	+181
Irish Republic	415,876	471,933	-12	4,166,574	3,695,344	+13
Israel	709,960	592,192	+20	7,047,205	5,537,578	+27
Italy	4,542,615	5,032,175	-10	42,496,369	42,703,729	0
Ivory Coast	56,809	77,864	-27	526,016	648,117	-19
Jamaica	11,680	34,410	-66	76,064	342,390	-78
Japan	2,848,660	2,997,922	-5	40,754,905	42,270,873	-4
Jordan	190,105	222,297	-14	1,824,622	1,612,209	+13
Kazakhstan	83,914	91,248	-8	1,384,863	1,390,738	0
Kenya	121,814	108,448	+12	1,280,447	1,194,784	+7
Kosovo	52,757	30,881	+71	349,475	193,826	+80
Kyrgyzstan	0	1	-	0	5,793	-
Latvia	1,716,935	881,839	+95	23,693,309	5,530,790	+328
Lebanon	2,100,496	1,663,722	+26	19,089,313	12,431,824	+54
Liberia	5,145	15,762	-67	116,678	153,976	-24
Lithuania	352,650	215,556	+64	4,909,093	2,285,032	+115
Luxembourg	10,346	15,815	-35	98,169	116,954	-16
Macao	14,112	0	-	176,693	0	-
Macedonia	30,419	0	-	431,803	0	-
Madagascar	19,168	36,105	-47	222,730	314,514	-29
Malaysia	1,098,572	895,874	+23	10,220,579	8,873,811	+15
Maldives	67,088	24,001	+180	1,173,284	321,459	+265
Mali	15,772	13,362	+18	191,302	260,691	-27
Malta	99,054	115,875	-15	1,085,229	1,129,731	-4

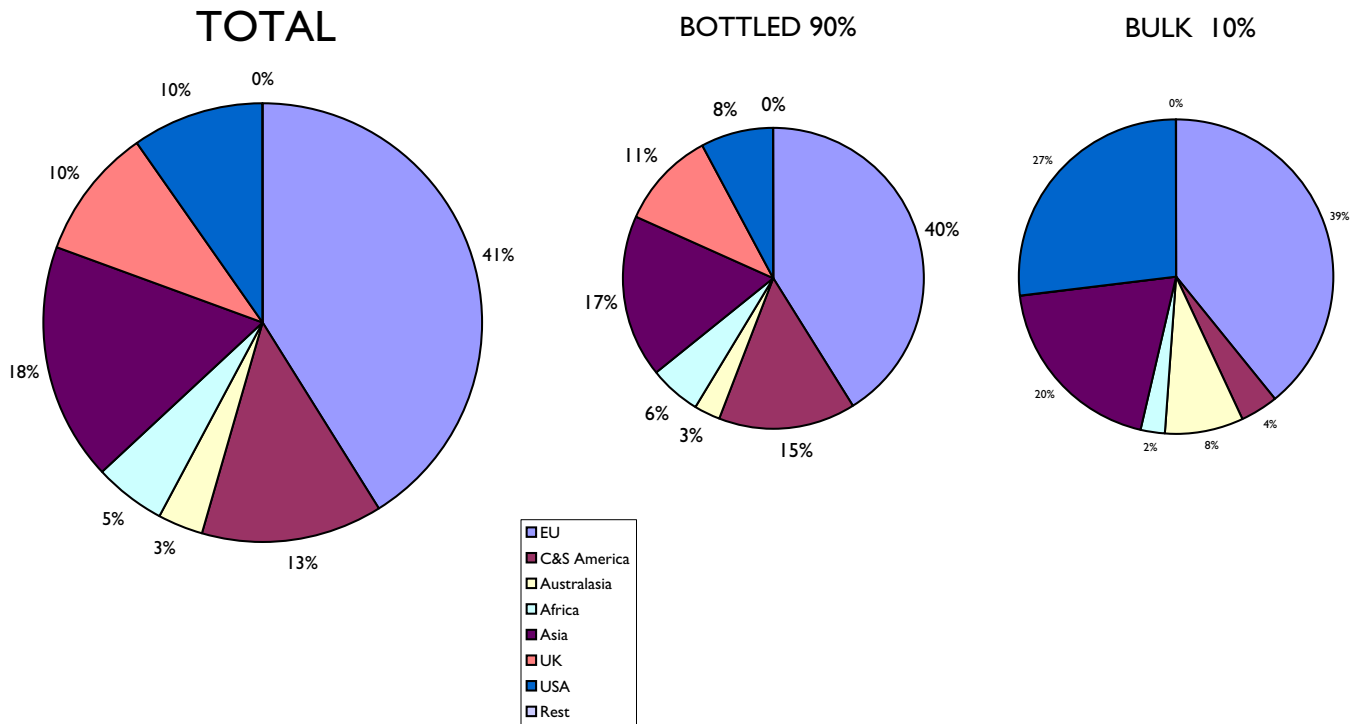
13 Volume and value of exports of Scotch Whisky by country for the years ending 31 December 2008 and 2007

	Volume LPA			Vol. % Diff	Value £			Value % Diff
	2008	2007			2008	2007		
Marshall Islands	3,348	0	-		28,074	0	-	
Mauritania	2,858	0	-		55,740	0	-	
Mauritius	237,402	243,069	-2		1,102,737	1,003,215	+10	
Melilla	0	480	-		0	1,948	-	
Mexico	4,836,820	3,185,687	+52		33,597,801	21,149,000	+59	
Moldova	437	0	-		5,525	0	-	
Mongolia	2,290	0	-		60,797	0	-	
Montserrat	1,512	961	+57		12,354	9,751	+27	
Morocco	686,700	538,136	+28		7,985,920	5,628,281	+42	
Mozambique	10,734	0	-		104,774	0	-	
Namibia	3,189	16,799	-81		29,084	146,658	-80	
Nauru	0	11	-		-	1,242	-	
Nepal	99,103	175,952	-44		618,114	999,513	-38	
Netherlands	3,235,852	3,676,669	-12		33,976,802	31,703,472	+7	
Netherlands Antilles	1,069,706	1,252,730	-15		13,504,303	14,723,761	-8	
New Caledonia	206,620	180,241	+15		1,559,768	1,273,490	+22	
New Zealand	616,272	578,968	+6		4,830,301	3,978,135	+21	
Nicaragua	5,592	0	-		65,322	0	-	
Niger	0	17,065	-100		0	230,020	-	
Nigeria	414,639	247,283	+68		4,742,622	2,789,268	+70	
Norway	451,526	373,756	+21		5,545,579	4,260,175	+30	
Oman	560,751	459,542	+22		3,525,986	2,177,988	+62	
Pakistan	1,872	1,058	+77		1,368	2,169	-37	
Panama	3,346,170	3,422,746	-2		45,155,901	39,640,262	+14	
Papua New Guinea	11,110	32,348	-66		54,240	91,341	-41	
Paraguay	988,406	736,024	+34		10,074,265	6,340,904	+59	
Peru	835,921	939,051	-11		7,929,385	8,141,396	-3	
Philippines	1,165,173	1,637,806	-29		3,022,713	2,399,751	+26	
Poland	2,275,828	1,937,311	+17		21,345,906	16,026,395	+33	
Portugal	4,462,461	4,408,705	+1		58,421,057	48,464,908	+21	
Puerto Rico	663,916	703,545	-6		9,669,794	9,202,923	+5	
Qatar	373,203	404,937	-8		3,592,764	2,909,494	+23	
Romania	1,540,489	1,042,414	+48		18,969,347	9,919,400	+91	
Russia	1,596,093	1,362,326	+17		23,883,197	21,201,627	+13	
Rwanda	12,297	12,614	-3		142,247	134,643	+6	
San Marino	0	4,766	-		0	20,224	-	
Saudi Arabia	358	0	-		10,161	0	-	
Senegal	31,063	23,337	+33		422,367	286,801	+47	
Serbia	301,107	272,777	+10		2,488,684	1,899,520	+31	
Seychelles	17,122	29,915	-43		292,478	429,114	-32	
Sharjah etc	1,176,906	1,482,498	-21		7,524,616	11,429,199	-34	
Sierra Leone	7,741	9,601	-19		130,686	115,880	+13	
Singapore	13,699,139	13,092,843	+5		184,512,797	158,141,361	+17	
Slovakia	33,324	38,190	-13		497,339	388,629	+28	
Slovenia	303,005	305,748	-1		2,687,859	1,989,845	+35	
Solomon Islands	5,414	19,046	-72		31,575	79,558	-60	
Somalia	0	4,233	-		0	11,760	-	
South Africa	12,487,416	12,054,241	+4		101,417,891	90,944,589	+12	
South Korea	11,487,608	11,222,342	+2		148,352,542	139,347,950	+6	
Spain	28,672,111	33,129,568	-13		333,230,392	308,439,948	+8	
Sri Lanka	415,449	416,090	-		6,220,427	5,571,123	+12	
St Christopher (St Kitts) & Nevis	32,226	57,316	-44		268,872	523,774	-49	
St Helena	0	58	-		0	699	-	
St Lucia	69,181	64,578	+7		467,111	412,967	+13	
St Pierre & Miquelon	0	627	-		0	5,585	-	

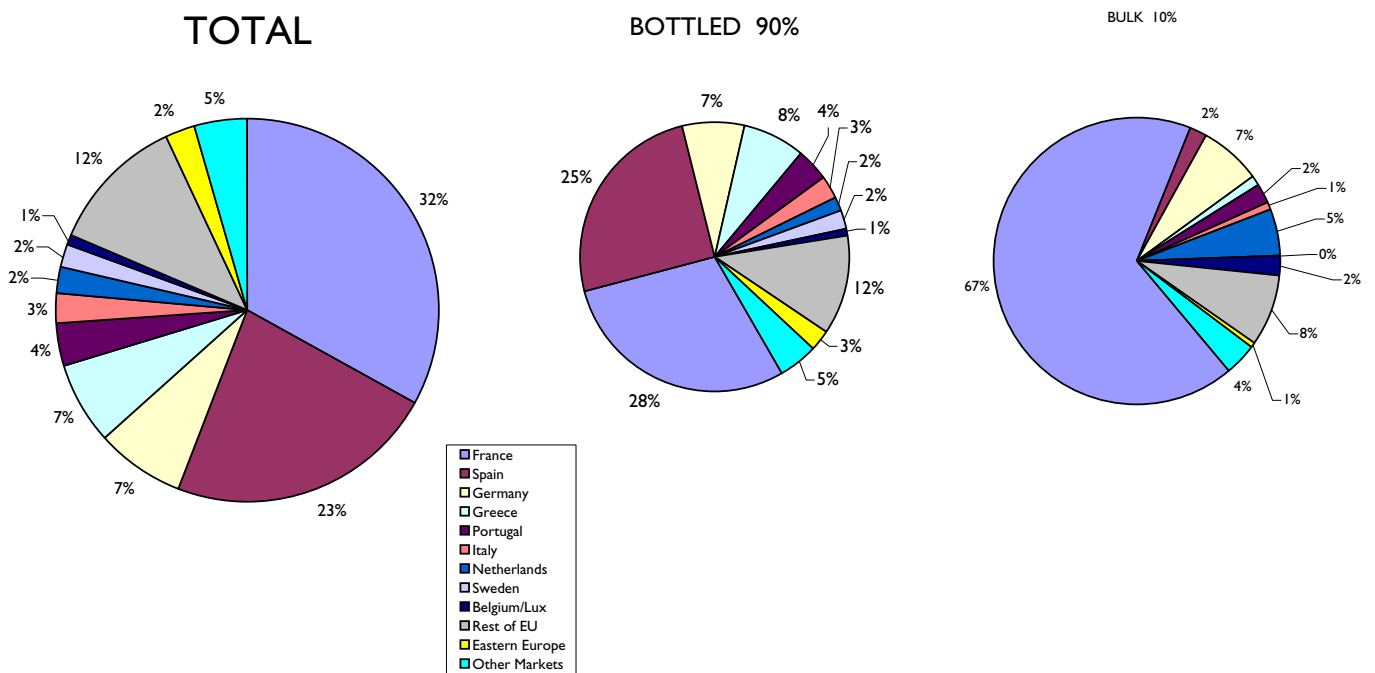
13 Volume and value of exports of Scotch Whisky by country for the years ending 31 December 2008 and 2007

	Volume LPA			Vol. % Diff	Value £			Value % Diff
	2008	2007			2008	2007		
St Vincent	5,785	4,235	+37	113,121	56,561	-		
Surinam	356,343	500,313	-29	4,509,836	4,147,891	+9		
Swaziland	12,886	8,994	+43	70,428	77,035	-9		
Sweden	2,729,249	2,566,255	+6	33,114,268	27,818,695	+19		
Switzerland	1,653,166	1,718,754	-4	20,275,049	17,527,782	+16		
Syria	227,556	226,824	-	1,866,266	2,289,574	-18		
Taiwan	3,671,098	4,547,668	-19	74,435,928	81,832,877	-9		
Tanzania	114,895	84,699	+36	935,610	694,282	+35		
Thailand	9,208,040	11,114,982	-17	33,101,308	37,818,508	-12		
Togo	78,403	62,521	+25	786,352	640,428	+23		
Tonga	1	0	-	1,450	0	-		
Trinidad & Tobago	698,345	689,518	+1	9,517,786	6,950,084	+37		
Tunisia	26,900	138,118	-81	371,197	1,628,361	-77		
Turkey	3,068,674	3,161,258	-3	28,097,022	24,588,649	+14		
Turks & Caicos Islands	4,455	2,868	+55	75,316	59,582	+26		
Uganda	12,688	297,765	-96	185,004	389,591	-53		
Ukraine	257,969	442,527	-42	4,567,401	6,876,705	-34		
Uruguay	3,118,378	2,371,083	+32	18,239,296	13,076,946	+39		
US Virgin Islands	62,772	62,747	-	932,175	991,507	-6		
USA	29,983,294	33,795,574	-11	371,406,667	419,173,312	-11		
Uzbekistan	0	2,373	-	0	37,712	-		
Venezuela	6,708,074	11,591,383	-42	66,984,399	104,209,811	-36		
Vietnam	198,545	70,775	+181	1,592,245	275,436	+478		
Virgin Islands (British)	5,729	4,282	+34	124,472	86,280	+44		
Zambia	43,062	56,443	-24	752,397	688,737	+9		
Zimbabwe	3,262	476	+585	38,774	4,857	+698		
Total	302,367,100	318,436,324	-5	3,056,876,800	2,824,558,206	+8		

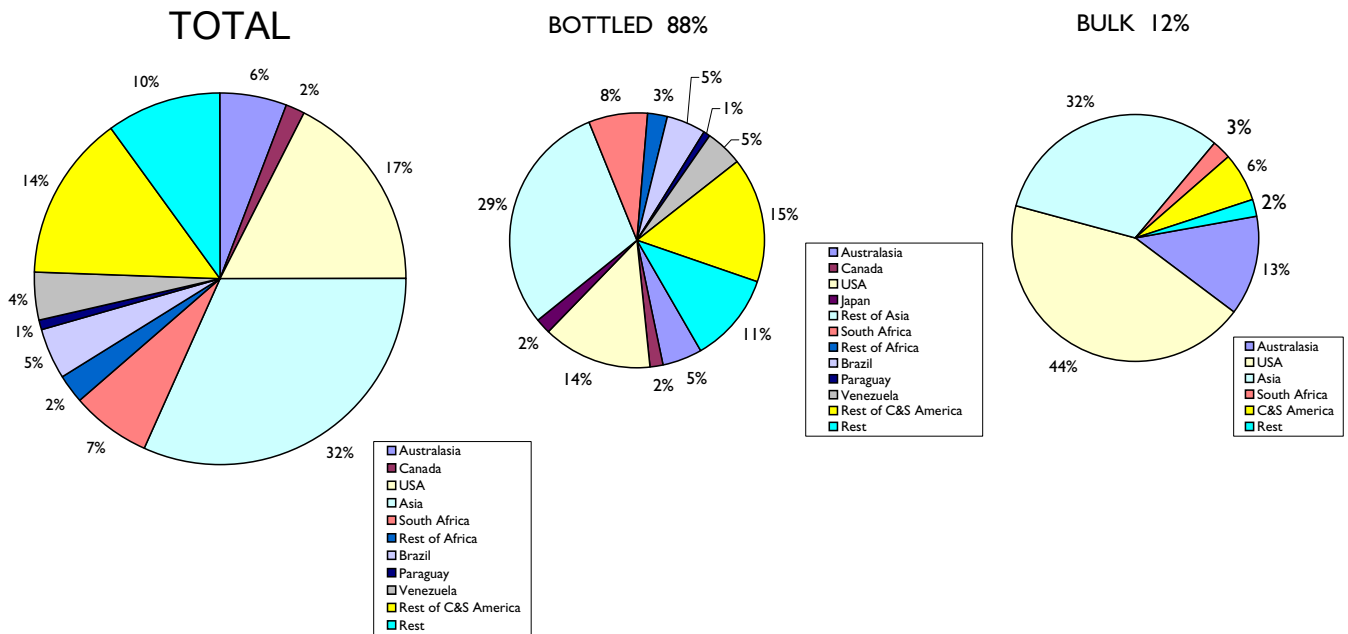
14 Geographic distribution of 2008 world sales of blended Scotch Whisky



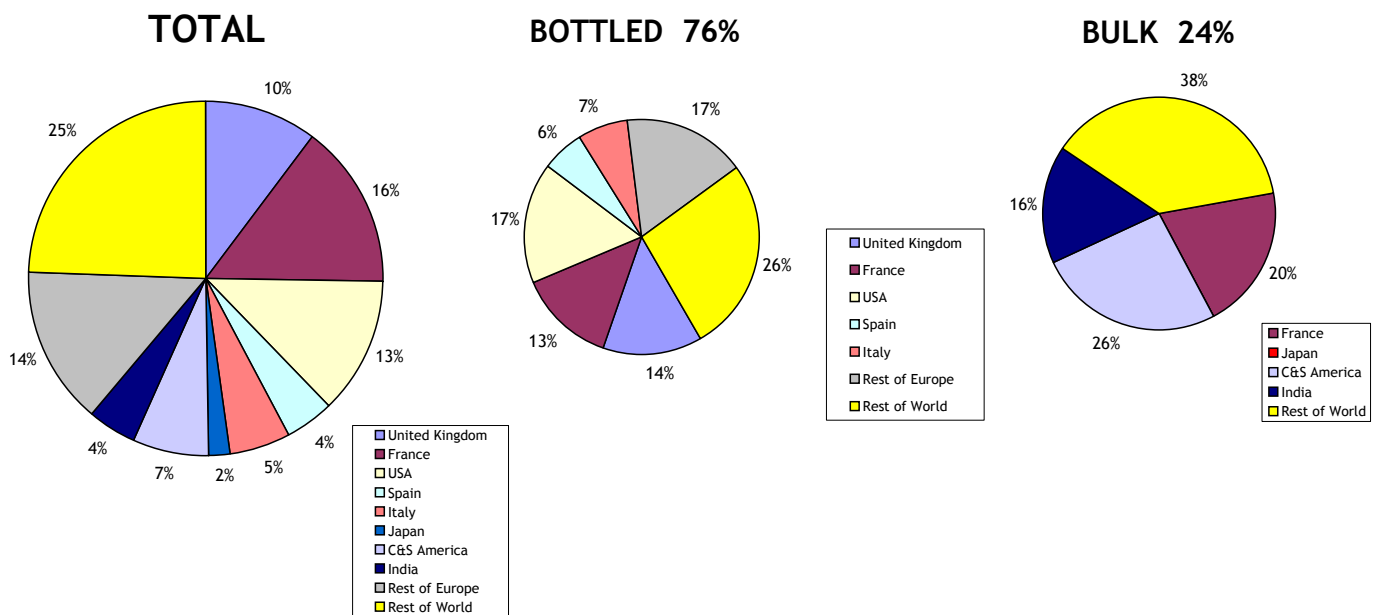
15 Market distribution of 2008 sales of blended Scotch Whisky in continental Europe



16 Market distribution of 2008 sales of blended Scotch Whisky in 'rest of world'



17 Market distribution of 2008 sales of malt Scotch Whisky



UK DUTY

18 Scotch Whisky - incidence of duty

	Duty per 75cl Bottle £	Duty per Litre of Pure Alcohol £		Duty per ² 70cl Bottle £	Duty per 75cl Bottle £	Duty per Litre of Pure Alcohol £		
1947	13 November	1.11	3.68	1985	19 March	-	4.73	15.77
1948	12 April	1.23	4.06	1990	20 March	-	5.21	17.35
1961	26 July (10% Regulator) ¹	1.35	4.47	1991	19 March ⁶	-	5.69	18.96
1964	15 April	1.50	4.96	1992	10 March	5.55	5.94	19.81
1965	7 April	1.70	5.63	1993	30 November	5.55	-	19.81
1966	21 July (10% Regulator) ¹	1.87	6.19	1994	8 December ³	5.77	-	20.60
1968	20 March	2.00	6.61	1995	25 November	5.54	-	19.78
1968	22 November (10% Regulator) ¹	2.20	7.26	1996	26 November	5.32	-	18.99
1973	1 April ⁶	1.80	5.95	1997	2 July ⁴	5.48	-	19.56
1974	27 March ⁶	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	5.98	-	21.35
1980	27 March	3.56	11.87	2009	22 April	6.34	-	22.64
1981	10 March	4.08	13.60					
1982	9 March	4.34	14.47					
1983	15 March	4.56	15.19					
1984	13 March	4.64	15.48					

NOTES:

- The 10% increases in the Spirit Duty in 1961, 1966, and 1968 were consolidated into the Spirit Duty by the Finance Act in the following years.
- 70cl bottle mandatory from 1 January 1992 under EC Directive 75/106 (as subsequently amended).
- The duty increase announced on 8 December 1994 came into effect from 1 January 1995.
- The duty increase announced on 2 July 1997 came into effect from 1 January 1998.
- The duty increase announced on 12 March 2008 came into effect from 17 March 2008.
- VAT The duty was subject to Value Added Tax at 10% from 1 April 1973, 8% from 29 July 1974, 15% from 12 June 1979, and 17.5% from 1 April 1991.

19 Duty ratios per centilitre of alcohol between other alcoholic drinks and Scotch Whisky

	ABV	1990/1/2	1993	1993/94	1995	1996/97/98	1999	2000/1/2	2003	2004	2005	2006	2007/8	2009
Beer	4.93%	1:1.99	1:1.90	1:1.90	1:1.83	1:1.76	1:1.70	1:1.64	1:1.60	1:1.55	1:1.51	1:1.47	1:1.43	1:1.37
Table Wine	11.20%	1:1.76	1:1.68	1:1.64	1:1.57	1:1.51	1:1.47	1:1.42	1:1.38	1:1.34	1:1.31	1:1.27	1:1.23	1:1.19

20 Approximate amount of duty on a normal measure of three kinds of alcoholic drink, each containing approximately the same amount of alcohol

	ABV	2007	2008	2009
284ml (1/2 pint) Beer	4.93%	19.20p	20.95p	23.06p
125ml Table Wine	11.20%	22.25p	24.29p	26.75p
35ml Scotch Whisky	40.00%	27.38p	29.89p	31.70p

NOTE:

The duty-paid price per measure is subject to Value Added Tax at the current rate of 15%, due to return to 17.5% in January 2010.

21 Duty charged per centilitre of pure alcohol for three different kinds of drink

	ABV	2007	2008	2009
Beer	4.93%	13.71p	14.96p	16.47p
Table Wine	11.20%	15.89p	17.35p	19.11p
Scotch Whisky	40.00%	19.56p	21.35p	22.64p

NOTE:

The duty-paid price per measure is subject to Value Added Tax at the current rate of 15%, due to return to 17.5% in January 2010.

APPENDIX

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

AUSTRALASIA

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, Curacao, Dominica, Dominican Republic, Ecuador, El Salvador, Falkland Islands, French Guiana, French Southern Territories,

Grenada, Guadeloupe, Guatemala, Guyana, Haiti, Honduras, Jamaica, Martinique, Montserrat, Nicaragua, Panama, Paraguay, Peru, Puerto Rico, 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, Macedonia (Former Yugoslav Republic of), 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

Abu Dhabi, Bahrain, Dubai, Iran, Iraq, Israel, Jordan, Kuwait, Lebanon, Occupied Palestinian Territory, Oman, Qatar, Saudi Arabia, Sharjah etc, Syria, Yemen

NORTH AMERICA

Canada, Mexico, St Pierre & Miquelon, USA

