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This is the fourth publication of *Food and Drink in Scotland: Key Facts*. Publishing of the fourth edition coincides with Scotland’s National Food and Drink Conference 2012. Key facts and figures from a range of sources including official statistics, consumer surveys and research are drawn together to produce the booklet.

The booklet is tailored around the five strategic objectives of the Scottish Government: Wealthier and Fairer, Smarter, Healthier, Safer and Stronger, and Greener, demonstrating the wide-ranging nature of food and drink policy. Further information on these objectives, along with details of Scotland’s performance on a range of topics, can be found on the Scottish Government’s website at:

http://www.scotland.gov.uk/About/scotPerforms

As Scotland’s food and drink policy moves forward, it is important to build on, and improve, the evidence base on food and drink issues.

The following section details the different definitions of food and drink used. Information on food and drink as a Key Sector\(^1\) in the Government Economic Strategy is presented in the key statistics at a glance section (the Key Sector encompasses Agriculture, Fisheries and Food and Drink Manufacturing and is also known as a growth sector). The wider Food and Drink policy is aimed at the whole Food and Drink Supply Chain and so the booklet also includes information on the food and drink supply chain where possible. It is noted throughout which definition has been used.

This booklet was produced by Rural and Environmental Science and Analytical Services, Environment and Forestry Directorate, the Scottish Government.

If you have any feedback on this publication please email Rural and Environmental Science and Analytical Services on:

foodevidence@scotland.gsi.gov.uk

March 2012

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**Note on Scottish Annual Business Statistics data**

Scottish Annual Business Statistics (SABS) is based on data from the Annual Business Survey (ABS) (formerly Annual Business Inquiry (ABI)) conducted by the Office for National Statistics (ONS). Data relating to 2009 relates to Standard Industrial Classification (SIC) 2007. Data relating to 2008 and earlier is on a SIC 2003 basis.

Updates to the SIC are required to enable it to more accurately reflect the structure of the modern economy. As a result caution should be used when drawing conclusions from the data presented. A dashed line has been included between 2008 and 2009 on any charts where this is applicable, for an example see Chart 1.1.

Full details of the sector definitions used are provided at the definitions table on page 8.

Scottish results for the wholesale of food, beverages and tobacco is under-reported for 2009.

**Future updates to data**

Please note that updated figures relating to several of the charts within this booklet are due to be published within the coming months. In order to incorporate the new figures, updates to these charts will be added to the document in its web-based format as they are made available on the Scottish Government website. More specifically:

- Charts 1.15 – 1.18 Scottish food and drink exports data – update due March 2012.
- Charts 1.22 – Retail sales of Scottish food and drink brands – update due June 2012.
- Chart 1.23 Estimated value of food procurement by public sector, Scotland – update due April 2012.
### Food and Drink in Scotland: Definitions

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<th>Coverage</th>
<th>Standard Industrial Classification</th>
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</thead>
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<td><strong>Food and Drink Manufacturing</strong></td>
<td>The manufacturing/processing sector only</td>
<td>2003 15 Manufacture of food products, beverages 2007 10 (manufacture of food products) + 11 (manufacture of beverages)</td>
</tr>
<tr>
<td><strong>Food and Drink Key Sector</strong>*</td>
<td>Food &amp; Drink Manufacturing plus Agriculture**, Sea Fishing and Aquaculture</td>
<td>2003 15 Manufacture of food products, beverages plus 5.01 Fishing and 5.02 Operation of Fish Hatcheries and Fish Farms 2007 10 manufacture of food products, 11 manufacture of beverages, 3 fishing and aquaculture</td>
</tr>
<tr>
<td><strong>Rest of Food and Drink Supply Chain</strong></td>
<td>Food and Drink Wholesaling</td>
<td>2003 51.3 Wholesale of food, beverages and tobacco*** 2007 46.3 Wholesale of food, beverages and tobacco (excluding 46.35 wholesale of tobacco)</td>
</tr>
<tr>
<td></td>
<td>Plus Food and Drink Retailing</td>
<td>2003 52.1 Retail sale in non-specialised stores (excluding 52.12 Other retail sale in non-specialised stores) 52.2 Retail sale of food, beverages and tobacco in specialised stores (excluding 52.26 Retail sale of tobacco products) 2007 47.1 Retail sale in non-specialised stores (excluding 47.19, other retail sale in non-specialised stores) 47.2 Retail sale of food, beverages and tobacco in specialised stores (excluding 47.26, retail sale of tobacco products)</td>
</tr>
<tr>
<td></td>
<td>Plus Food and Drink Service Activities (previously Non Residential Catering)</td>
<td>2003 55.3 Restaurants 55.4 Bars 55.5 Canteens and Catering 2007 56.1 Restaurants and mobile food service activities 56.2 Event catering and other food service activities 56.3 Beverage serving activities</td>
</tr>
</tbody>
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* Also known as a growth sector.

** SIC classifications are not used for agriculture. For Scottish Agriculture – Scottish Farm Income Estimates, 2011, Economic Report on Scottish Agriculture, 2011 and Agricultural Census, June 2011 are used in this publication.

*** This includes 51.35 Wholesale of tobacco products, a very small sub-sector which could not be excluded due to disclosure reasons.
Food and Drink Statistics at a glance:
Key statistics by definition, 2009 (for definitions see page 8)

<table>
<thead>
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<th>Food and Drink Supply Chain</th>
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<td>Gross value added £bn</td>
<td>4.8</td>
<td>10.5</td>
</tr>
<tr>
<td>Turnover £bn</td>
<td>11.9</td>
<td>34.0</td>
</tr>
<tr>
<td>Employment* 000s</td>
<td>113.8</td>
<td>360</td>
</tr>
<tr>
<td>Number of business units**</td>
<td>55,096</td>
<td>75,647</td>
</tr>
</tbody>
</table>

* Employment figures for agriculture comprise working occupiers, spouses of occupier and employees.
** For agricultural sectors the number of holdings is used instead.

Breakdown of food and drink manufacturing, 2009

<table>
<thead>
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<th>Food and Drink Manufacturing</th>
<th>Food Manufacturing</th>
<th>Drink Manufacturing</th>
<th>Food and drink manufacturing as a % of Scottish manufacturing</th>
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<td>Gross value added £bn</td>
<td>4.0</td>
<td>1.2</td>
<td>2.7</td>
<td>31%</td>
</tr>
<tr>
<td>Turnover £bn</td>
<td>9.0</td>
<td>4.7</td>
<td>4.4</td>
<td>26%</td>
</tr>
<tr>
<td>Employment</td>
<td>44,400</td>
<td>33,600</td>
<td>10,800</td>
<td>23%</td>
</tr>
<tr>
<td>Number of business units</td>
<td>1,193</td>
<td>956</td>
<td>237</td>
<td>13%</td>
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</table>
Gross Value Added (GVA) for the food and drink Key Sector reached £4.8 billion in 2009.
Drinks manufacturing GVA accounted for 57% and food manufacturing 26% of key sector GVA for 2009.

Source: Scottish Annual Business Statistics (SABS) and Economic Report on Scottish Agriculture, 2011

Gross Value Added (GVA) of the retailing sector was £3,016 million in 2009.
For 2009 GVA for food and drink service activities was £1,588 million.

Source: Scottish Annual Business Statistics
Chart 1.3 Gross Value Added in food and drink manufacturing in Scotland by main sub-sectors, 2009

Source: Scottish Annual Business Statistics
- Drinks manufacturing accounted for 69% of the total GVA in the food and drink manufacturing sector.
- Fish processing contributed 7% and meat processing 4.5%.

Chart 1.4 Food and drink manufacturing labour productivity, 2008-2009

Source: Scottish Annual Business Statistics
- Labour productivity (GVA per employee) in food and drink manufacturing increased from £85,050 in 2008 to £89,221 in 2009.
- Labour productivity (GVA per employee) in the drink manufacturing sector increased from £240,704 in 2008 to £253,749 in 2009.
Chart 1.5 Turnover in the food and drink key sector in Scotland, 2007-2009


- Turnover in the food and drink key sector in Scotland reached £11.9 billion in 2009.

Chart 1.6 Turnover in the rest of the food and drink supply chain in Scotland, 2007-2009

Scottish Annual Business Statistics
- Turnover in the retail and food and drink services (formerly non-residential catering) reached £12,065 million and £3,536 million respectively for 2009.
Chart 1.7 Percentage of employment in the food and drink supply chain in Scotland, 2009

- In 2009 the food and drink services and retailing sectors employed the majority of the food and drink supply chain workforce, accounting for 32% and 30% of total employees respectively.
- Agriculture and manufacturing were the next most significant contributors to employment in the supply chain employing 19% and 12% respectively. The smallest contributors were fishing and aquaculture at just under 1% combined.

Source: *Scottish Annual Business Statistics, 2009 except agriculture sourced from Agricultural Census, June 2011*
Agricultural labour force is made up of working occupiers, their working spouses and hired employees, which consists of regular staff plus casual and seasonal staff.

Employment in agriculture was the lowest in 2008 at 64,513 employees. Since then employment has increased in each year to reach 67,806 employees in 2011.

Chart 1.8 Employment in agriculture in Scotland, 2007-2011

Chart 1.9 Employment in the food and drink key sector in Scotland, 2007-2009

In 2009 across the key sector as a whole agriculture accounted for the largest proportion of employment at 59%. Food manufacturing also accounts for a large proportion of employees at 30%.

Drinks manufacturing accounts for 9% of employment and fishing and aquaculture 2%.
Employment in the wholesaling and retailing sectors increased overall between 2007 and 2009.

Employment in food and drink services (formerly non-residential catering) increased from 113,500 in 2007 to 116,300 in 2009.

In 2011, 53% of all employees in the food and drink supply chain were employed by businesses with 250+ employees.

Large firms with 250+ employees employed 80% of individuals within the retailing sector, 63% of those employed in manufacturing and 46% in wholesaling.

71% of employees are employed in businesses with 0-9 employees in agriculture and 69% in fishing and aquaculture.

Note: agriculture employees are defined as regular, casual and seasonal staff (excluding occupiers and spouses) on agricultural holdings.
Chart 1.12 Size of businesses in the food and drink manufacturing sector in Scotland, 2007-2011

Source: Scottish Government, ONS (IDBR)

- In the food and drink manufacturing sector 64% of firms had 1-49 employees in 2011, down from 68% in 2010.
- The number of firms with 250+ employees rose from 3% in 2007 to 6% in 2011.

Chart 1.13 Employees in the food and drink supply chain in Scotland by gender, 2010


- In 2010 there were more male employees than female in agriculture (76%), food and drink manufacturing (61%) and wholesaling (68%). Female employees made up a larger proportion of employees in retailing (56%) and food and drink services (formerly non-residential catering) (55%).
- Across the food and drink supply chain 51% of employees were male and 49% female.

Note: Data for fishing and aquaculture is disclosive agriculture employees are defined as regular, casual and seasonal staff (excluding occupiers and spouses) on agricultural holdings.
In 2010 there were more part-time than full-time workers in the retailing (65%) and food and drink services (57%). The agriculture, fishing, aquaculture, manufacturing and wholesaling sectors all employed more full-time staff.

Across all 7 parts of the supply chain, 50% of employees were full-time and 50% were part-time.

Note: Agriculture employees are defined as regular, casual and seasonal staff (excluding occupiers and spouses) on agricultural holdings.

Exports of food and drink overseas increased by 28% from £3.5 billion in 2007 to £4.5 billion in 2010, mainly due to increase in drink exports.

In 2010 food exports amounted to £1.1 billion and drink exports were £3.4 billion. Note: Includes live animals, fish, animal feed, food and drink manufacturing and wholesale exports. Drink exports are exports from the UK of Scotch Whisky.
Chart 1.16 Composition of food exports from Scotland to overseas, 2010

Source: HMRC Regional Trade Statistics

- In 2010, exports of fish accounted for 59% of total food exports.
- Dairy, cereal and meat exports accounted for £99 million, £75 million and £69 million of food exports respectively.

Note: Includes live animals, fish, animal feed, food manufacturing and wholesale exports.
The EU15 region was the biggest market for Scottish overseas food exports in 2010, accounting for 70.2% of the total food exports.

Eastern Europe, North America and Asia and Oceania each accounted for 9.9%, 7.0% and 4.3% respectively.

Note: Includes live animals, fish, animal feed, food manufacturing and wholesale exports.

Source: HMRC Regional Trade Statistics
Chart 1.18 Top 10 country destinations of food exports from Scotland, 2010

Source: HMRC Regional Trade Statistics

- 10 countries accounted for 80% of all Scottish food exports overseas.
- France was the biggest buyer of Scottish food produce, accounting for 25.9% of the total overseas food exports. The Irish Republic and Spain were the next two biggest markets, purchasing 9.2% and 8.1% each.

Note: Includes live animals, fish, animal feed, food manufacturing and wholesale exports.

Chart 1.19 Food and drink exports from Scotland to the rest of the UK, 2007-2010

Source: Global Connections Survey

- Exports of food and drink to the rest of the UK increased between 2007 and 2010 from £4,355 million to £5,935 million.
- As a whole, exports increased in agriculture and fisheries, wholesale and manufacture of food and drink products sectors.
- The only areas that demonstrated a fall in exports were the mixed farming and live animal wholesale sub-sectors.
Chart 1.20 Destination of the majority of Scottish processors’ sales by sector, 2007

Source: Input-Output tables, the Scottish Government, 2007

- 28% of all Scottish processors’ output is sold within Scotland. Further 45% is sold in the rest of the UK, whilst the remaining 27% is exported to the rest of the world.
- The dairy, soft drinks, confectionery and meat sectors sell predominantly within the UK, whilst the spirits and wines sector focuses largely on non-UK markets, with 56% of its produce sold abroad.

Note: Processors of food and drink only.
Between 2007 and 2011 the value of grocery sales of Scottish brands in Great Britain increased by £453 million, 32%.

The value of grocery sales of Scottish brands in Great Britain over the period 2010 to 2011 increased by £28 million, 2%.

Source: Kantar Worldpanel
In 2007/2008, education, social work, health and prison sectors accounted for 77% of total public sector expenditure on food and drink, which was £129.3 million.

The total food and drink spending in the four sectors increased from £84.8 million in 2003/2004 to £99.2 million in 2007/2008, mainly due to increase in expenditure in the education sector.
Source: Input-Output tables, the Scottish Government, 2007

- In 2007 sales of Scottish primary produce reached a total of £3.1 billion, with 20% bought by Scottish households and 19% by Scottish processors.
- 47% of sales were to non-Scottish purchasers and 6% to Scottish primary producers.

Note: primary produce is the output of the agriculture, sea fishing and fish farming industries. Processors now based on IOCs 8-19.
UK tourist expenditure on food and drink was £510 million in 2010. This is a return to 2007 levels of expenditure falling a period of decline. The number of tourist visits to Scotland fell from 13.1 million in 2007 to 12.4 million in 2010.
• In 2007, expenditure on research and development (R&D) in food and drink manufacturing was £7.7 million, this dropped to £7 million in 2008 and has since risen to reach £9.9 million in 2010.

Source: Business Enterprise Research and Development Scotland 2010

• R&D spending as a percentage of GVA fell from 0.24% in 2007 to 0.2% for 2008 and rose again to 0.25% of GVA for 2009.

Note: GVA data for 2010 is not available.
The percentage of employees not fully proficient in their job in the food and drink manufacturing and wholesaling sectors was the same as for other sectors in 2010. On the rest of the measures, food and drink sectors performed better than other sectors.

Note: Skill shortages refer to vacancies that are hard to fill because applicants lack the necessary skills, qualifications and experience. Skill gaps arise when an employer judges that an employee is not fully proficient in their job.

Chart 2.4 Knowledge of daily maximum intake for salt amongst Scottish consumers, 2010


- Only 12% of respondents gave the correct answer.
- 47% provided an incorrect answer and 41% responded with don’t know.
Chart 2.5 Knowledge of daily recommended allowance for total fat amongst men and women in Scotland, 2010


• 3% of women gave the correct answer and 0% of men gave the correct answer.
• 60% of men and 65% of women responded with don’t know.

Chart 2.6 Knowledge of daily recommended allowance of saturated fat in men and women in Scotland, 2010


• Around half of men and women responded that they did not know the recommended allowance.
• 8% of men and 6% of women provided the correct answer for saturated fat.
Chart 3.1 Household purchases of food and drink products by category - comparisons within the UK, 2010

<table>
<thead>
<tr>
<th>Category</th>
<th>Scotland</th>
<th>Northern Ireland</th>
<th>England</th>
<th>Wales</th>
</tr>
</thead>
<tbody>
<tr>
<td>Meat</td>
<td>1,098</td>
<td>1,014</td>
<td>1,048</td>
<td>1,092</td>
</tr>
<tr>
<td>Fish</td>
<td>1,159</td>
<td>1,174</td>
<td>1,181</td>
<td>1,168</td>
</tr>
<tr>
<td>Fruit and veg (exc. potatoes)</td>
<td>2,259</td>
<td>2,306</td>
<td>2,160</td>
<td>2,154</td>
</tr>
<tr>
<td>Sugar and sweet products</td>
<td>569</td>
<td>630</td>
<td>599</td>
<td>642</td>
</tr>
<tr>
<td>Alcoholic drinks (ml)</td>
<td>1,028</td>
<td>1,044</td>
<td>1,076</td>
<td>1,082</td>
</tr>
</tbody>
</table>

Source: Family Food 2010, Defra

- In 2010 Scottish household purchased less fruit and vegetables than England and Wales, and less meat than those in Northern Ireland and Wales.
- Scottish consumers purchased a larger quantity of alcoholic drinks than those in Northern Ireland, England and Wales.

Chart 3.2 Consumption of fruit and vegetables portions – comparisons within the UK, 2003-04 to 2010

Source: Family Food 2010, Defra

- Over the period of 2003-04 to 2010, Scottish consumers consumed less fruit and vegetable portions a day than those in England and Wales but more than those in Northern Ireland.
- Consumption of fruit and vegetables in Scotland increased from 3 portions per person per day in 2003-2004 to 3.5 portions in 2010. This is still 1.5 portions below the 5-a-day target.

Note: Portions adjusted for wastage (10%).
HEALTHIER – Diet and Nutrition

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3.3 Trend in average energy intake (household and eating out) - comparisons within the UK, 2003-2004 to 2010

Source: Scottish Health Survey 2010

- In 2010 average energy intake per person per day from eating out and household consumption was higher in Scotland than in Wales, England and Northern Ireland.
- This is despite an overall decline for the period in Scotland from 2,390 kcal per person per day in 2003-2004 to 2,367 in 2010.

3.4 Percentage of adults overweight and obese, Scotland, 2003, 2008-2010

Source: Scottish Health Survey 2010

- The percentage of men overweight (excluding obese) in Scotland fell from 43% in 2003 to 40% in 2010, over the same period the percentage of obese men rose from 22% to 27%.
- The percentage of women overweight (excluding obese) in Scotland was the same in 2003 as in 2010 at 34% whilst the percentage of women classed as obese rose from 26% to 29% over the same period.
Of all 17 countries considered, Scotland has the third greatest obesity rate, behind the US and Mexico.

The overall UK figure is 23%, 5 percentage points lower than in Scotland. Italy and Norway had the lowest rate of obesity among the countries considered at 10%.

Note: difference in survey methodologies limits data comparability, M denotes measured data whilst SR denotes self-reported figures.

In 2010 16% of boys were obese and 16% were overweight (excluding obese) and 16% of girls were overweight (excluding obese) whilst 13% were obese.

2008 saw the highest percentage of overweight and obese boys at 19% and 17% respectively.

For girls the highest percentage overweight was seen in 2003 at 17% whilst obesity was at its highest in 2009 at 15%.

Note: Overweight is defined as BMI at or above 85th percentile. Obese is defined as BMI at or above 95th percentile.
Chart 3.7 Food/Nutrient changes in relation to the Scottish Dietary Targets 2007-2009

<table>
<thead>
<tr>
<th>Target Food/Nutrient</th>
<th>Scottish Dietary Target</th>
<th>2001</th>
<th>2006</th>
<th>2007</th>
<th>2008</th>
<th>2009</th>
<th>Statistically significant change between 2001 and 2009</th>
</tr>
</thead>
<tbody>
<tr>
<td>Fruit and Vegetables</td>
<td>More than 400g per day</td>
<td>239g</td>
<td>256g</td>
<td>270g</td>
<td>264g</td>
<td>257g</td>
<td>↑</td>
</tr>
<tr>
<td>Bread (all types)</td>
<td>154g per day</td>
<td>101g</td>
<td>93.5g</td>
<td>90.4g</td>
<td>85.9g</td>
<td>87.3g</td>
<td>↓</td>
</tr>
<tr>
<td>Brown/Wholemeal bread</td>
<td>More than 77g per day</td>
<td>16.1g</td>
<td>21.0g</td>
<td>21.1g</td>
<td>21.2g</td>
<td>19.2g</td>
<td>↑</td>
</tr>
<tr>
<td>Breakfast cereals (all types)</td>
<td>34g per day</td>
<td>19.5g</td>
<td>19.2g</td>
<td>22.2g</td>
<td>21.5g</td>
<td>23.2g</td>
<td>↑</td>
</tr>
<tr>
<td>Oil rich fish</td>
<td>88g per week</td>
<td>28.2g</td>
<td>37.1g</td>
<td>31.6g</td>
<td>31.8g</td>
<td>29.5g</td>
<td>↔</td>
</tr>
<tr>
<td>White fish</td>
<td>No decrease (figures per week)</td>
<td>92.9g</td>
<td>92.7g</td>
<td>94.5g</td>
<td>89.1g</td>
<td>89.5g</td>
<td>↔</td>
</tr>
<tr>
<td>Fat</td>
<td>&lt;35% food energy</td>
<td>39.2%</td>
<td>39.1%</td>
<td>39.0%</td>
<td>39.3%</td>
<td>39.3%</td>
<td>↔</td>
</tr>
<tr>
<td>Saturated fat</td>
<td>&lt;11% of food energy</td>
<td>15.7%</td>
<td>15.9%</td>
<td>15.4%</td>
<td>15.5%</td>
<td>15.3%</td>
<td>↓</td>
</tr>
<tr>
<td>NMES</td>
<td>Adults -no ↑, Children &lt;10%</td>
<td>15.6%</td>
<td>15.2%</td>
<td>15.1%</td>
<td>15.1%</td>
<td>15.0%</td>
<td>↓</td>
</tr>
<tr>
<td>Total complex carbohydrate</td>
<td>155g per day</td>
<td>138g</td>
<td>133g</td>
<td>140g</td>
<td>137g</td>
<td>138g</td>
<td>↔</td>
</tr>
</tbody>
</table>

Source: Estimation of food and nutrient intakes from Expenditure and Food Survey & Living Costs and Food Survey data in Scotland 2001-2009, FSA Scotland

Note: The changes between 2001 and 2009 have been calculated by FSA Scotland and the directions of changes has been determined to be statistically significant.
Food and Drink in Scotland: Key Facts

Chart 4.1 Agricultural production in Scotland by value of activity output (£ million), 2011

- In 2011 finished livestock and cereals contributed 36% and 15.7% respectively of total agricultural output.
- Livestock products, other crops and horticulture contributed 13%, 10% and 8.8% respectively.

Source: Scottish Farm Income Estimates, 2011

Chart 4.2 Agricultural production for human consumption, UK and Scotland, 2007-2010

- Agricultural production for human consumption in Scotland was lowest in 2007 at £1,547 million, by 2010 this had increased to £1,722 million.
- Agricultural production for human consumption in the whole of the UK has followed a similar pattern as Scotland. Agricultural production for human consumption increased between 2007 and 2010 from £10,949 million to £13,617 million.

Source: RESAS, the Scottish Government, Defra
Per capita of population, Scotland's agricultural sector produces more food for human consumption than the agricultural sector in the UK as a whole. In 2010, per capita production in Scotland stood at £330, whilst UK production per capita was £219.

Compared to 2008, in 2009 Scottish agricultural production per capita decreased by £16. UK agricultural production per capita decreased by £11 per capita during the same period.

Per hectare of agricultural land in 2010, the UK produced £745 and Scotland £305 worth of food for human consumption.

In both Scotland and the UK production per hectare of agricultural land increased between 2007 and 2010. Compared to 2008, in 2009 production per hectare of agricultural land fell by £10 in Scotland and by £17 in the UK.
The percentage of agricultural land used for crops, grazing and woodland in Scotland has remained relatively constant between 2007 and 2010 at around 5.6 million hectares.

Woodland and other land increased by 4 percentage points, with a 1 percentage point and 3 percentage point fall in crops and grazing land respectively between 2007 and 2011.

The majority (55%) of total food imports into Scotland originate from the EU15 Community.

A further 28% of total food imports in 2010 were from the Latin America and Caribbean region.
Chart 4.7 Top food imports from each importing region (imports from the rest of the UK excluded), 2010

Source: HMRC Regional Trade Statistics

- The top food import from the EU15 into Scotland is dairy and eggs accounting for 24% of all imports from the region in 2010.
- Animal feed accounted for 89% of all imports from Latin America and the Caribbean and 77% of imports from North America.
- Imports from the Middle East and North Africa are mainly fruit and vegetables making up 71% of imports from that region.

Chart 4.8 Food imports into Scotland in 2007 and 2010

Source: HMRC Regional Trade Statistics

- Total food imports into Scotland have risen by £445 million between 2007 and 2010.
- The largest rise by value was in imports of animal feed which rose from £168 million in 2007 to £406 million in 2010. Imports of sugar rose from £20 million in 2007 to £90 million in 2010.
Food and Drink in Scotland: Key Facts

Chart 4.9 Net exports by food category (excluding Scotland's trade with the rest of the UK), 2010

Source: HMRC Regional Trade Statistics

- In total, in 2010, Scotland imported more food and live animals than it exported, this amounted to -£53 million. The largest trade surplus is for fish and seafood, accounting for £498 million.
- Scotland had a trade deficit of £351 million in animal feed and £103 million in fruit and vegetables.

Chart 4.10 Location of Food Standard Agency Licensed Slaughterhouses in Scotland, 2011

Scottish Government FSA licensed slaughterhouses mapped against GROS postcodes 2011 (2). © Crown copyright and database right 2012. All rights reserved.


- There are 39 slaughter houses in Scotland. Their locations are shown on the map.
Chart 4.11  Distance to supermarket or convenience store by local authority in Scotland, 2010

<table>
<thead>
<tr>
<th>Local authority</th>
<th>Average distance (metres)</th>
<th>Local authority</th>
<th>Average distance (metres)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Edinburgh, City of</td>
<td>416</td>
<td>Fife</td>
<td>921</td>
</tr>
<tr>
<td>Glasgow City</td>
<td>421</td>
<td>South Lanarkshire</td>
<td>934</td>
</tr>
<tr>
<td>Dundee City</td>
<td>478</td>
<td>East Lothian</td>
<td>944</td>
</tr>
<tr>
<td>Aberdeen City</td>
<td>541</td>
<td>North Ayrshire</td>
<td>1,053</td>
</tr>
<tr>
<td>West Dunbartonshire</td>
<td>544</td>
<td>Angus</td>
<td>1,481</td>
</tr>
<tr>
<td>West Lothian</td>
<td>581</td>
<td>Stirling</td>
<td>1,740</td>
</tr>
<tr>
<td>Clackmannanshire</td>
<td>595</td>
<td>Perth &amp; Kinross</td>
<td>2,020</td>
</tr>
<tr>
<td>North Lanarkshire</td>
<td>639</td>
<td>Moray</td>
<td>2,328</td>
</tr>
<tr>
<td>Renfrewshire</td>
<td>643</td>
<td>Dumfries &amp; Galloway</td>
<td>2,681</td>
</tr>
<tr>
<td>Falkirk</td>
<td>706</td>
<td>Scottish Borders</td>
<td>2,725</td>
</tr>
<tr>
<td>East Renfrewshire</td>
<td>727</td>
<td>Aberdeenshire</td>
<td>2,938</td>
</tr>
<tr>
<td>South Ayrshire</td>
<td>758</td>
<td>Highland</td>
<td>3,668</td>
</tr>
<tr>
<td>East Dunbartonshire</td>
<td>758</td>
<td>Argyll &amp; Bute</td>
<td>3,713</td>
</tr>
<tr>
<td>Inverclyde</td>
<td>812</td>
<td>Orkney Islands</td>
<td>4,215</td>
</tr>
<tr>
<td>Midlothian</td>
<td>836</td>
<td>Eilean Siar</td>
<td>9,456</td>
</tr>
<tr>
<td>East Ayrshire</td>
<td>907</td>
<td>Shetland Islands</td>
<td>10,826</td>
</tr>
</tbody>
</table>

Source: Ordnance Survey’s Points of Interest and Scottish Government
- City local authorities have shorter distances (Edinburgh average is 416 metres).
- Rural local authorities have longer distances (Shetland average is 10,826 metres).

Note: For the analysis, food stores were comprised of Supermarket and Convenience Stores as defined by Ordnance Survey’s Points of Interest dataset (PointX - June 2010 release). Our methodology is such that results for drive times are tabulated to the Data Zone level, and then aggregated up to higher geographies. Distances are an average calculated via the road network.
Chart 4.12 Percentage of population within 15 minutes driving time to a food store in Scotland, 2010

Source: Point X data (Ordnance Survey) using Drive Time Analysis Software, Scottish Government

- In 2010 the share of the population within 15 minutes driving time to a food store in Scotland was 100% for urban (indicated as rest of Scotland in the graph) and accessible rural areas in Scotland, while it was 90% for those in remote rural areas in Scotland.
Food retail price inflation was above the “all items” rate for most of 2009.

Between April and May 2011 food retail price inflation rose above that of the overall “all items” rate, peaking at 7.3% in June 2011 which was 2.3 % points above the “all items” rate.

In November and December 2011, food RPI has fallen below the all items RPI inflation rate by 0.3 and 0.2 percentage points respectively.

**Source:** Retail Price Index, Office for National Statistics
Since February 2009 which saw a 1.7% increase in food RPI, the biggest changes in food RPI in one month were seen in November and December 2010 where it increased by 1.3% and 1.4% respectively and December 2011, with an increase of 1.2%. Also, food RPI increased by 1.2% in May and December 2011.

Since the January 2009 fall in “all items” RPI of 1.3%, the biggest monthly changes were seen in April 2010 and February 2011 where the overall inflation rate increased by 1%.

Source: Retail Price Index, Office for National Statistics

Chart 4.14 Monthly Retail Price Index (RPI) inflation rate for each month January 2009-December 2011, UK

<table>
<thead>
<tr>
<th></th>
<th>Food</th>
<th>All items</th>
</tr>
</thead>
<tbody>
<tr>
<td>2009 Jan</td>
<td>-0.5</td>
<td>-1.3</td>
</tr>
<tr>
<td>2009 Feb</td>
<td>1.7</td>
<td>0.6</td>
</tr>
<tr>
<td>2009 Mar</td>
<td>-0.5</td>
<td>0</td>
</tr>
<tr>
<td>2009 Apr</td>
<td>-0.4</td>
<td>0.1</td>
</tr>
<tr>
<td>2009 May</td>
<td>0.7</td>
<td>0.6</td>
</tr>
<tr>
<td>2009 Jun</td>
<td>-0.2</td>
<td>0.3</td>
</tr>
<tr>
<td>2009 Jul</td>
<td>-0.4</td>
<td>0</td>
</tr>
<tr>
<td>2009 Aug</td>
<td>-0.6</td>
<td>0.5</td>
</tr>
<tr>
<td>2009 Sep</td>
<td>-0.7</td>
<td>0.4</td>
</tr>
<tr>
<td>2009 Oct</td>
<td>1</td>
<td>0.5</td>
</tr>
<tr>
<td>2009 Nov</td>
<td>0.2</td>
<td>0.3</td>
</tr>
<tr>
<td>2009 Dec</td>
<td>0.8</td>
<td>0.6</td>
</tr>
<tr>
<td>2010 Jan</td>
<td>0.1</td>
<td>0</td>
</tr>
<tr>
<td>2010 Feb</td>
<td>0.9</td>
<td>0.6</td>
</tr>
<tr>
<td>2010 Mar</td>
<td>0.3</td>
<td>0.7</td>
</tr>
<tr>
<td>2010 Apr</td>
<td>0.5</td>
<td>1</td>
</tr>
<tr>
<td>2010 May</td>
<td>-0.3</td>
<td>0.4</td>
</tr>
<tr>
<td>2010 Jun</td>
<td>0</td>
<td>0.2</td>
</tr>
<tr>
<td>2010 Jul</td>
<td>1.1</td>
<td>-0.2</td>
</tr>
<tr>
<td>2010 Aug</td>
<td>0.1</td>
<td>0.4</td>
</tr>
<tr>
<td>2010 Sep</td>
<td>0.1</td>
<td>0.4</td>
</tr>
<tr>
<td>2010 Oct</td>
<td>0.4</td>
<td>0.2</td>
</tr>
<tr>
<td>2010 Nov</td>
<td>1.3</td>
<td>0.4</td>
</tr>
<tr>
<td>2010 Dec</td>
<td>1.4</td>
<td>0.7</td>
</tr>
<tr>
<td>2011 Jan</td>
<td>0.4</td>
<td>0.3</td>
</tr>
<tr>
<td>2011 Feb</td>
<td>1.1</td>
<td>1</td>
</tr>
<tr>
<td>2011 Mar</td>
<td>-1</td>
<td>0.5</td>
</tr>
<tr>
<td>2011 Apr</td>
<td>0.1</td>
<td>0.8</td>
</tr>
<tr>
<td>2011 May</td>
<td>1.2</td>
<td>0.3</td>
</tr>
<tr>
<td>2011 Jun</td>
<td>0.9</td>
<td>0</td>
</tr>
<tr>
<td>2011 Jul</td>
<td>0.3</td>
<td>-0.2</td>
</tr>
<tr>
<td>2011 Aug</td>
<td>0.4</td>
<td>0.6</td>
</tr>
<tr>
<td>2011 Sep</td>
<td>0.2</td>
<td>0.8</td>
</tr>
<tr>
<td>2011 Oct</td>
<td>-0.7</td>
<td>0</td>
</tr>
<tr>
<td>2011 Nov</td>
<td>0.4</td>
<td>0.2</td>
</tr>
<tr>
<td>2011 Dec</td>
<td>1.2</td>
<td>0.4</td>
</tr>
</tbody>
</table>
Share of expenditure on food and non-alcoholic drinks decreases as income rises. In 2009 those in the poorest decile of income allocate 14.6% of their expenditure to food. For those on highest incomes, it only accounts for 7.7% of expenditure.

On average over the period 2007 to 2009 those in the lowest and third deciles allocated the greatest proportion of their expenditure on food at 16%.

 Meat accounted for 20% of Scottish consumer’s total expenditure on food – the greatest share. Bread, flour and cereals accounted for 13%, whilst alcoholic drinks accounted for 12% and milk, cheese and eggs accounted for 10%.

Expenditure on fruit and vegetables was 14% and expenditure on fish was 4% of the total.
Growth in sales of standard private label products has remained positive over the period. Whilst growth in branded products was marginally negative in the 12 weeks ending 17th April 2011 but remained positive for the rest of the period.

The rate of annual growth in sales of value products has increased over the period April 2011 to January 2012 from -11.6% to 8.3%. Premium private label products suffered a fall in the annual growth rate of sales October – December 2011 but returned to positive annual growth rate of 1.1% for the 12 weeks ending 22nd January 2012.

Source: Kantar Worldpanel

Note: Growth in sales compares sales during a 12-week period to sales during the same 12-week period in previous year.
Chart 4.18 Frequency of referral to “use by” date marks by respondents in Scotland, 2010

- 80% of respondents said they always check “use by” date marks when buying food.
- 76% of respondents always check “use by” dates when cooking or preparing food.


Chart 4.19 Attitudes to food safety in Scottish consumers, 2010

- 82% of respondents agreed and 52% definitely agreed with the statement “Restaurants and catering establishments should pay more attention to food safety and hygiene”.
- Around one quarter of respondents agreed with the statement “I often worry about whether the food I have is safe to eat”.

Chart 4.20  Number of businesses taking part in Food Hygiene Information Scheme, 2009-10

<table>
<thead>
<tr>
<th>Food Hygiene Information Scheme in Scotland, 2009-10</th>
</tr>
</thead>
<tbody>
<tr>
<td>Number of businesses in scheme</td>
</tr>
<tr>
<td>% receiving pass rates</td>
</tr>
</tbody>
</table>

Source: Food Hygiene Information Scheme, Food Standards Agency Scotland

- Almost 19,000 businesses in Scotland entered the Food Hygiene Information Scheme. Of these, 87% had received pass rates.

Note: Only one year of data currently available.
Greener – Emissions

Chart 5.1 Percentage of agricultural land area in Scotland, by type, 2011

- The total agricultural land area of Scotland is 5,625,159 hectares. Rough grazing is the predominant land use accounting for 55%.
- 10% of Scotland’s land area is used for crop, fallow and set-aside.

Source: Agricultural Census, June 2011

Chart 5.2 Trends in greenhouse gas and acid rain precursor emissions from food and drink manufacturing in the UK, 1990-2009

- Acid rain precursor emissions from food and drink manufacturing in the UK have fallen by 79% since 1990. In 2009, they amounted to 20 thousand tonnes of sulphur dioxide equivalent.
- Greenhouse gas emissions from food and drink manufacturing in the UK have fallen by 32% since 1990. In 2009, they amounted to 7,616 thousand tonnes of carbon dioxide equivalent.

Source: Environmental Accounts 2011, ONS
Source: Greenhouse Gas Inventory, Scottish Government, Defra

• Net Scottish GHG emissions (Mt CO₂ equivalent) from agriculture and related land use activities were reduced by 5% between 2007 and 2009 from 11.1 Mt CO₂ equivalent to 10.6 Mt CO₂ equivalent.

• The largest reduction in percentage and absolute terms was achieved in cropland conversion which produced 10% fewer GHG emissions in 2009 compared to 2007, a reduction of 0.3 Mt CO₂ equivalent.

Source: Food Transport Indicators, Defra

• For 2010 UK HGV accounted for the most CO₂ emissions from food transport at 29%. This was followed by car, accounting for 23% of emissions.

• Emissions from sea transport accounted for 15% and air and overseas HGV both accounted for 12% of emissions.
Chart 5.5 Value of energy purchased by Scottish food and drink manufacturing sub-sectors, 2009

Source: Office for National Statistics, Annual Business Survey (Compiled by Scottish Government)

- Within the food and drink manufacturing sector the drinks sub-sector purchased the greatest value of energy for own consumption at £57.2 million for 2009.
- Bakery and farinaceous products also purchases a high value of energy at £31.1 million.

Note: 2009 data is sampled on a SIC 2007 basis.

Chart 5.6 Value of energy purchased by Scottish food and drink manufacturing sub-sectors per £ GVA generated, 2009

Source: Office for National Statistics, Annual Business Survey (Compiled by Scottish Government)

- The animal feed sub-sector purchases the most energy per £ GVA generated within the food and drink manufacturing sector at £0.184 per £1 of GVA generated.
- Fruit and vegetable processing, dairy products and meat processing also purchase a high value of energy per £ GVA generated at £0.127 and £0.095 respectively (for both dairy and meat).

Note: 2009 data is sampled on a SIC 2007 basis.
Chart 5.7 Value of water purchased by Scottish food and drink manufacturing sub-sectors, 2009

Source: Office for National Statistics, Annual Business Survey (Compiled by Scottish Government)

- The drinks sector purchased £4.3 million of water in 2009, £1.8 million higher than any other sub-sector.
- Fish processing purchased £2.5 million of water in 2009, followed by bakery at £1.7 million and meat at £1.6 million.

Note: 2009 data is sampled on a SIC 2007 basis.

Chart 5.8 Value of water purchased by Scottish food and drink manufacturing sub-sectors per £ GVA generated, 2009

Source: Office for National Statistics, Annual Business Survey (Compiled by Scottish Government)

- Meat and fish processing both purchase the most water of the food and drink manufacturing sub-sectors per £ of GVA generated at £0.009 for 2009.
- The drinks sector’s high level of GVA in Scotland compared to the other sub-sectors of food and drink manufacturing means that water purchased by the drinks sector per £ GVA generated is very low at £0.002 for 2009.

Note: 2009 data is sampled on a SIC 2007 basis.
Chart 5.9 Under and over index of organic buyers by Great Britain region, 2010-2011

Source: Kantar Worldpanel

- Indexed against the percentage of total grocery market buyers within the region, London and the South have a higher percentage of Great Britain’s organic shoppers.
- Scotland has a slightly lower percentage of total organic shoppers, compared to the proportion of grocery market shoppers residing in Scotland.

Chart 5.10 Scottish consumers preferences to buy environmentally friendly products and local produce, 2008-2010

Source: Kantar Worldpanel

- In 2010, 20.8% of Scottish consumers stated that they try to buy environmentally friendly products. This represented a 5.7 percentage point increase compared to 2008 and a 3.0 percentage point increase compared to 2009. The percentage was still lower than that for the whole of the GB, which was 21.4%.
- Scottish consumers agreeing to the statement that they try to buy local produce increased by 7.8 percentage points between 2008 and 2010 to 30.3%. This is higher than that for the whole of GB, which was 28.8% in 2010.
Chart 5.11 Scottish consumers reasons for buying local food, 2010

Source: TNS-brmb Scottish Opinion Survey, October 2010

- 26% of consumers choose to buy local because they consider it to be good for the environment because it does not travel so far.
- 54% and 49% said it was to support local producers and local retailers respectively.

Chart 5.12 Registered Local Authority Eco-schools, 2007-2011

Source: Eco-Schools Scotland

- As of 1 January 2011 there were 3,054 local authority schools registered in the scheme.
- Between January 2007 and January 2011 there was an increase in the proportion of local authority schools with green flag awards, an increase from 14% to 37%.
Chart 5.13 Waste produced by reporting Food and Drink Federation member sites in Scotland, 2008 and 2009

Source: Mapping Waste in the Food Industry, Defra, FDF

- Food and packaging waste fell by 15% from 10,731 tonnes to 8,766 tonnes between 2008 and 2009, largely driven by a fall in food waste.
- In 2009, packaging waste was the largest share of waste in the food and drink industry accounting for 45% of all food and drink waste, followed by food waste accounting for 37%, and mixed waste at 19%.

Chart 5.14 Avoidable food and drink waste in Scotland by weight

Source: The Food We Waste in Scotland, WRAP, 2009

- In Scotland, households produce 566 thousand tonnes of food waste each year, of this around 389 thousand tonnes (68.8%) could have been avoided.
- Of this, the top three groups of food and drink wasted are: drinks accounting for 18% of waste; followed by fresh vegetables and salads at 16%; and bakery items at 12%.
Avoidable food waste costs Scottish households £977 million per year, £430 for the average household. Families with children waste £550 of avoidable food and drink waste on average compared to single-occupancy household at £310 on average.

Of this the top three groups of food and drink wasted by cost are: drinks accounting for 14% of waste; followed by meat and fish at 13%; and pre-prepared meals and snacks at 11%.

Source: The Food We Waste in Scotland, WRAP, 2009
Key Sources

Agricultural Census
http://www.scotland.gov.uk/Topics/Statistics/Browse/Agriculture-Fisheries/PubFinalResultsJuneCensus

Business Register Employment Survey, 2010

Annual Population Survey, 2010
http://www.esds.ac.uk/findingData/snDescription.asp?sn=6897

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http://www.scotland.gov.uk/Publications/2011/06/15143401/0


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Family Food 2010
http://www.defra.gov.uk/statistics/foodfarm/food/familyfood/

Food Hygiene Information Scheme, FSA Scotland
http://www.food.gov.uk/scotland/safetyhygiene/scot/foodhygieneinfoscot/

Food Transport Indicators, Defra

Global Connections Survey
http://www.scotland.gov.uk/Topics/Statistics/Browse/Economy/Exports/GCSIntroduction

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https://www.uktradeinfo.com/index.cfm?&hasFlashPlayer=true

Input-Output Tables
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Kantar Worldpanel
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http://www.statistics.gov.uk/default.asp
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http://www.scotland.gov.uk/Publications/2009/06/25102105/0

Scottish Annual Business Statistics
http://www.scotland.gov.uk/Topics/Statistics/Browse/Business/SABS

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http://www.scotland.gov.uk/Publications/2011/03/07124359/0

Scottish Farm Income Estimates 2011
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