

Scotland

A LAND OF
food and drink



***James Withers
Chief Executive***

***Scotland's
venison story so
far.....***



Scotland's food story in 2014



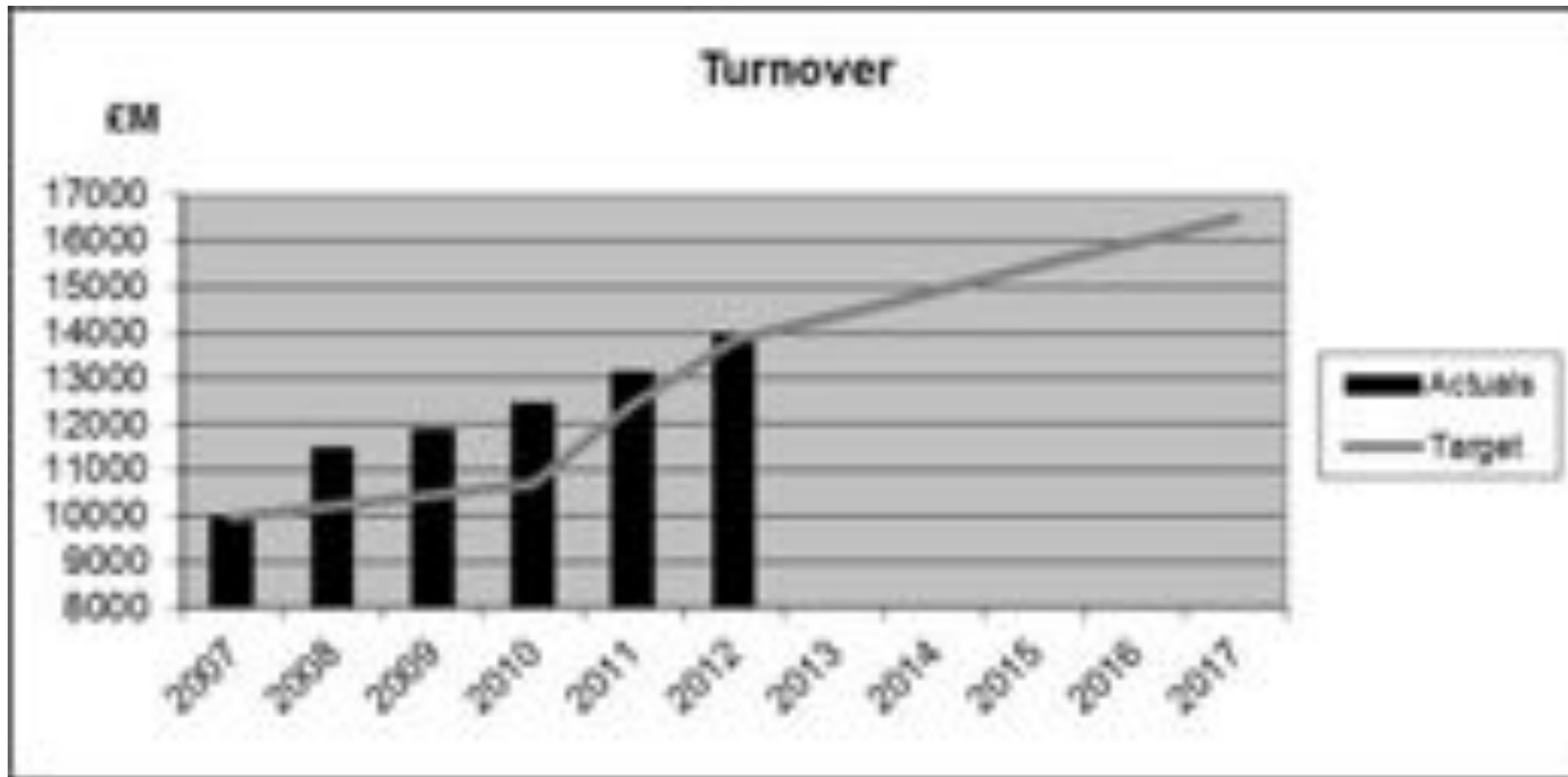








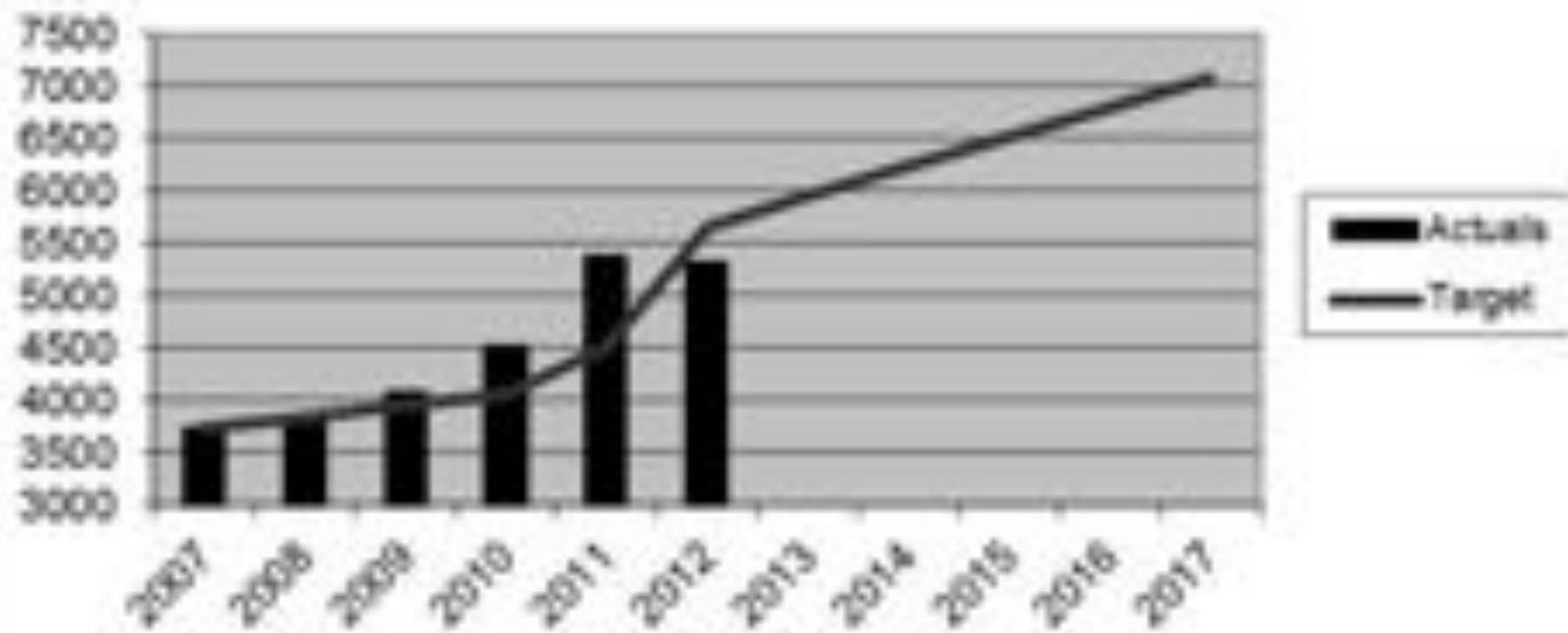
How are we performing?



Turnover marginally ahead of forecast target of £13.8bn

Exports

€M





Role of venison



SF&D / Scotpulse Shopper Omnibus Jan 2014

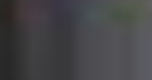
FOOD

Food & Drink

Vegetarian back on British menu

By [Name] 10/10/2010





NEW COLLECTION

www.tyco.com

Received 14 May 2006; accepted 12 July 2006
Published online 12 September 2006 in Wiley InterScience (www.interscience.wiley.com). DOI: 10.1002/anie.200601111

ONLY
M&S

Camp and sales of version soar by 400 per cent. Price is cut in half and is now being available as sausages and burgers and available at high street supermarkets

- **Stress** is a response to a stimulus that is perceived as a threat or challenge. It is a state of physiological and psychological arousal.

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**The market just now –
opportunity or challenge?**

Grocery Market

UK: £102.6 billion

+ 3.8% y on y

➤ **255 trips**

➤ **£15.34 per trip**



Scotland: £9.9 billion

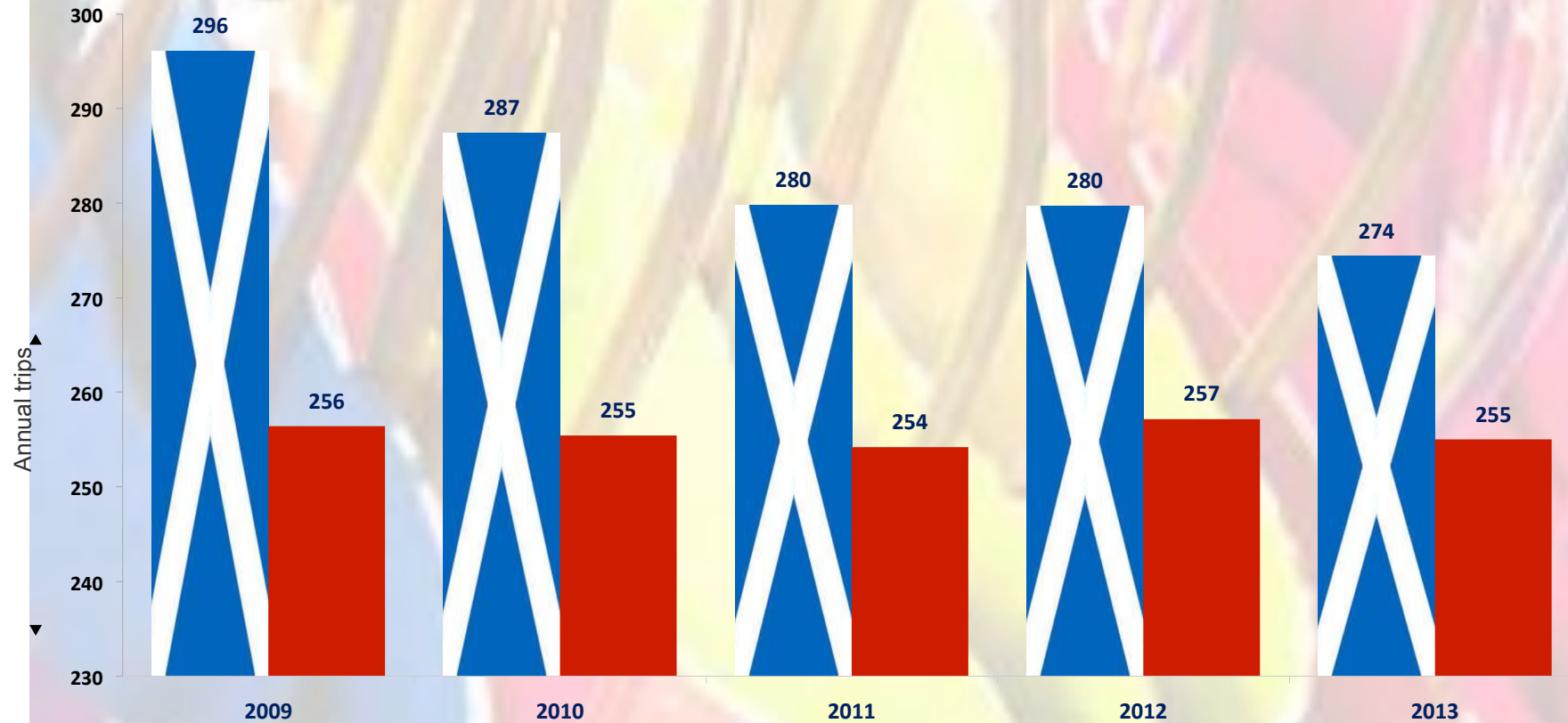
+ 3.6% y on y

➤ **274 trips**

➤ **£14.23 per trip**



Scottish shoppers making fewer trips



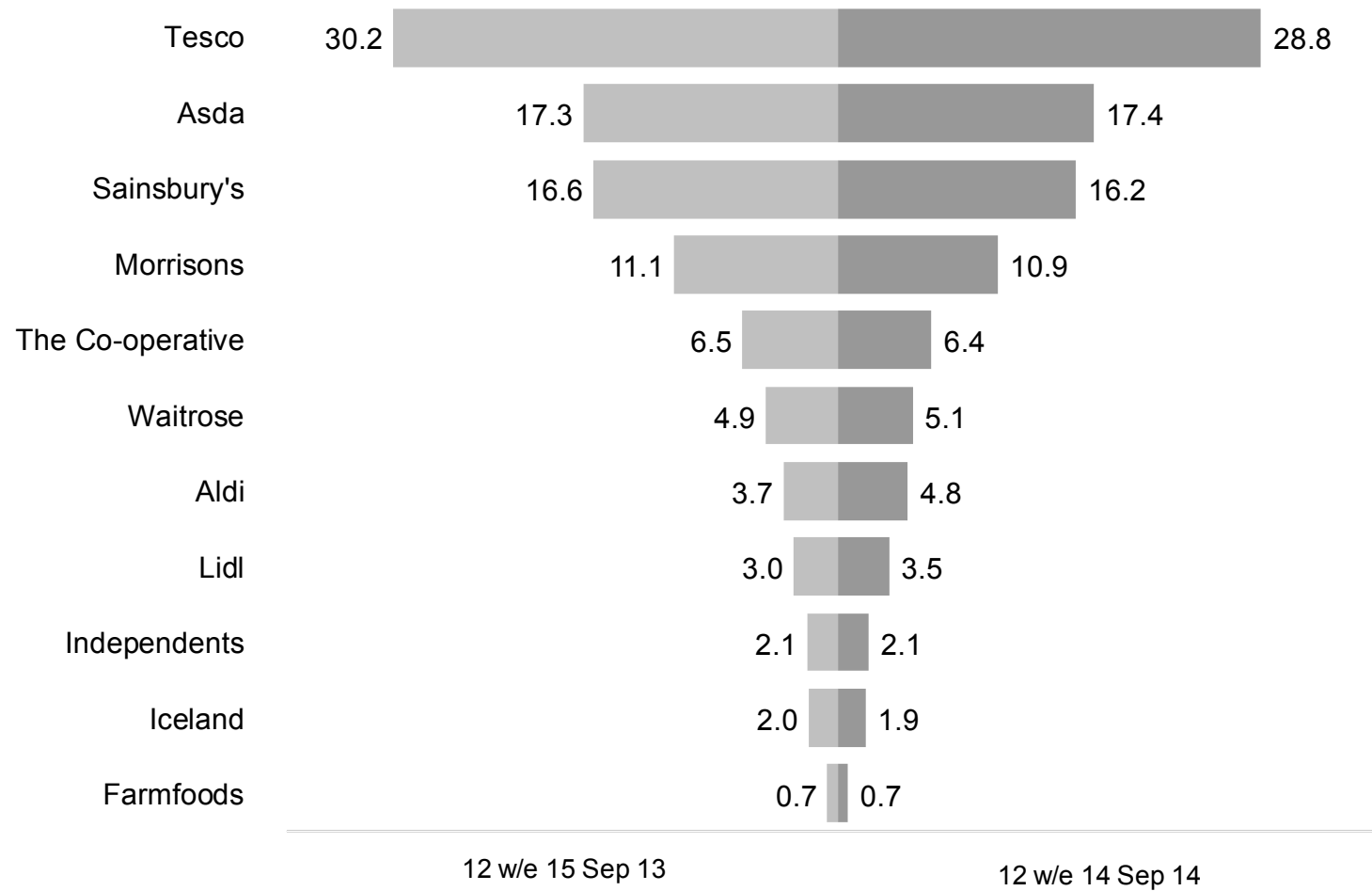
RST (Grocery) KWP 2013 P08. 52we 18 Aug 2013

SCOTLAND: INSIGHTS
OF FOOD & DRINK



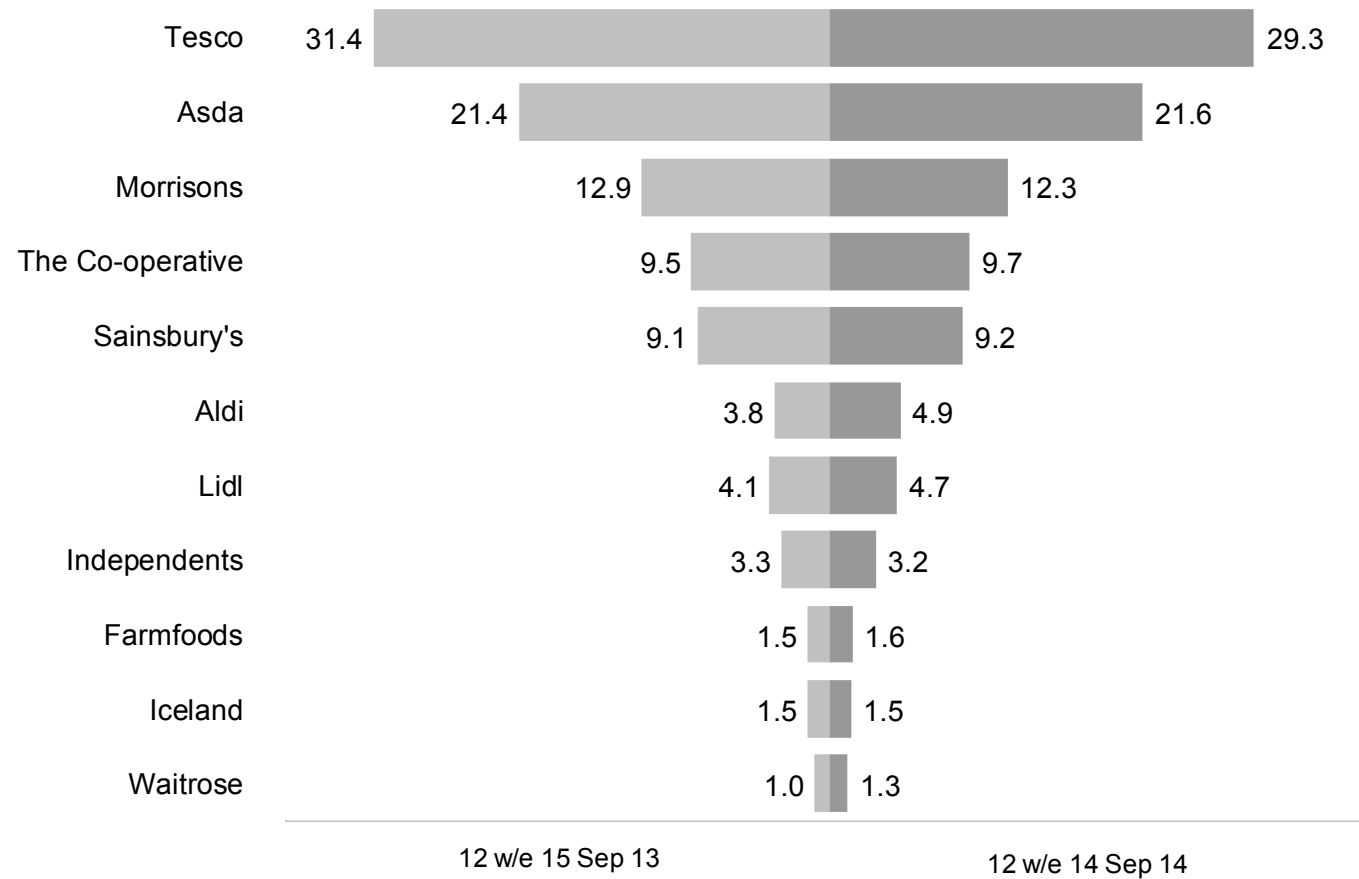


Latest Period Till Roll Totals - Share of Total Grocers



Source: Kantar Worldpanel 2014

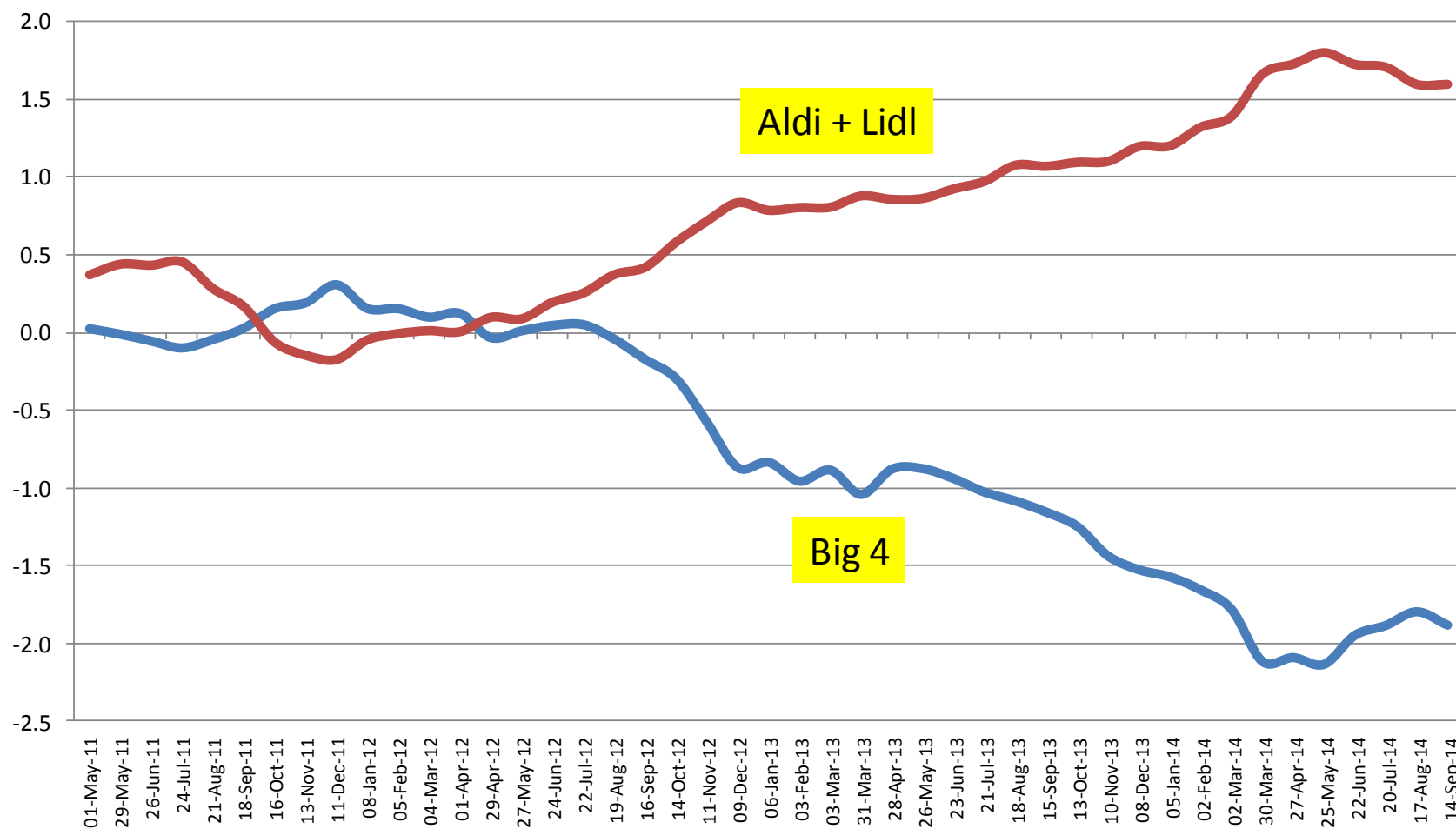
Latest Period Till Roll Totals - Share of Total Grocers



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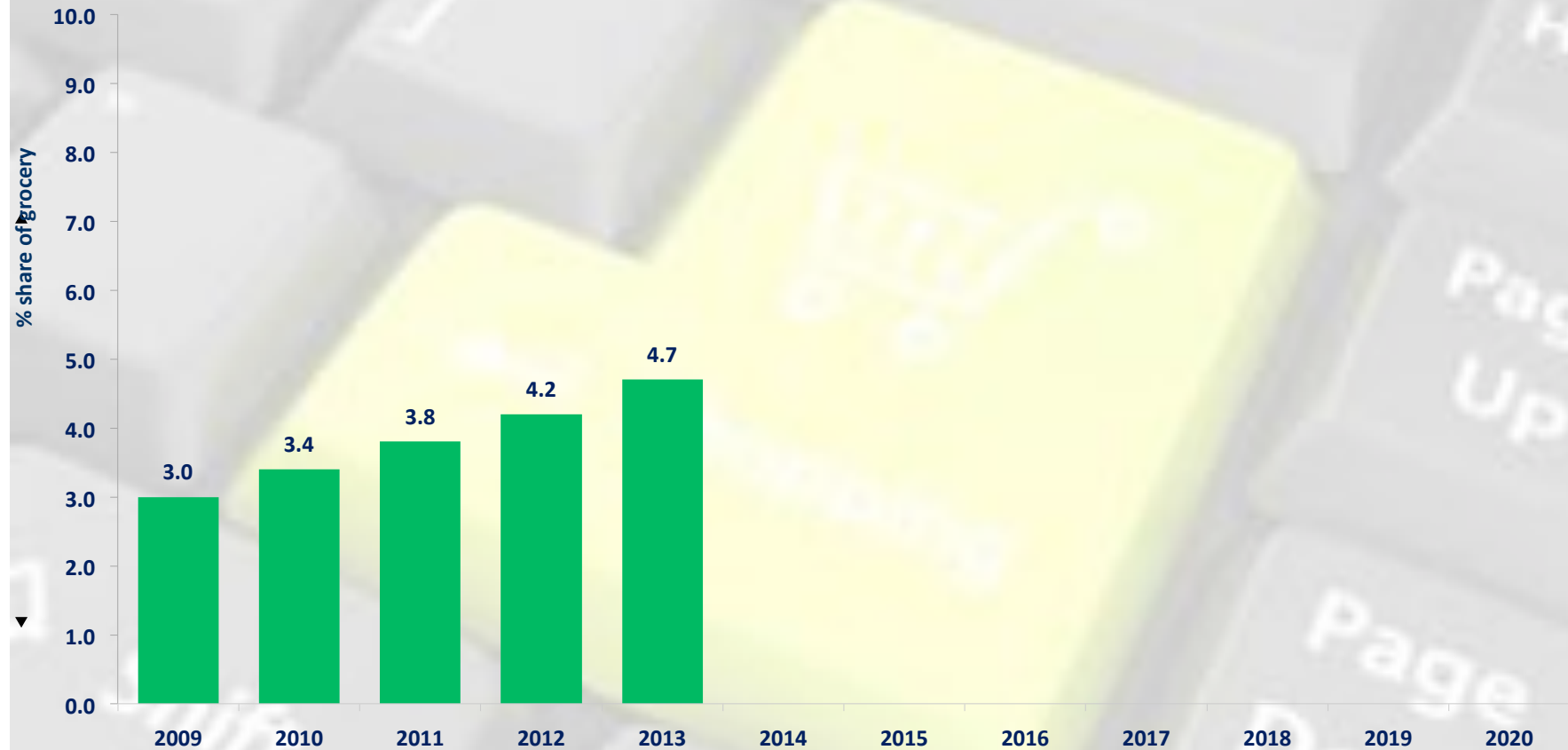


Till Roll Grocer Market Share Changes - Rolling 12 w/e £%



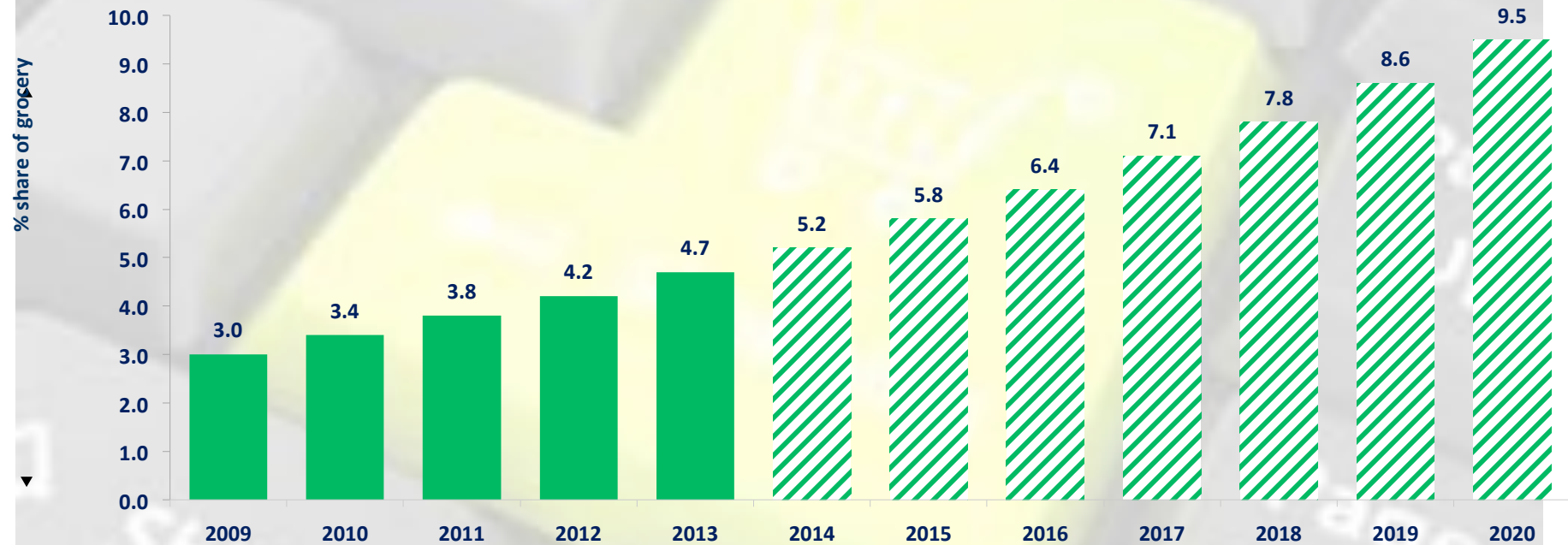
Source: Kantar Worldpanel 2014

Internet share growth



RST (Grocery) KWP 2013 P08. 52we 18 Aug 2013

Internet share growth



RST (Grocery) KWP 2013 P08. 52we 18 Aug 2013

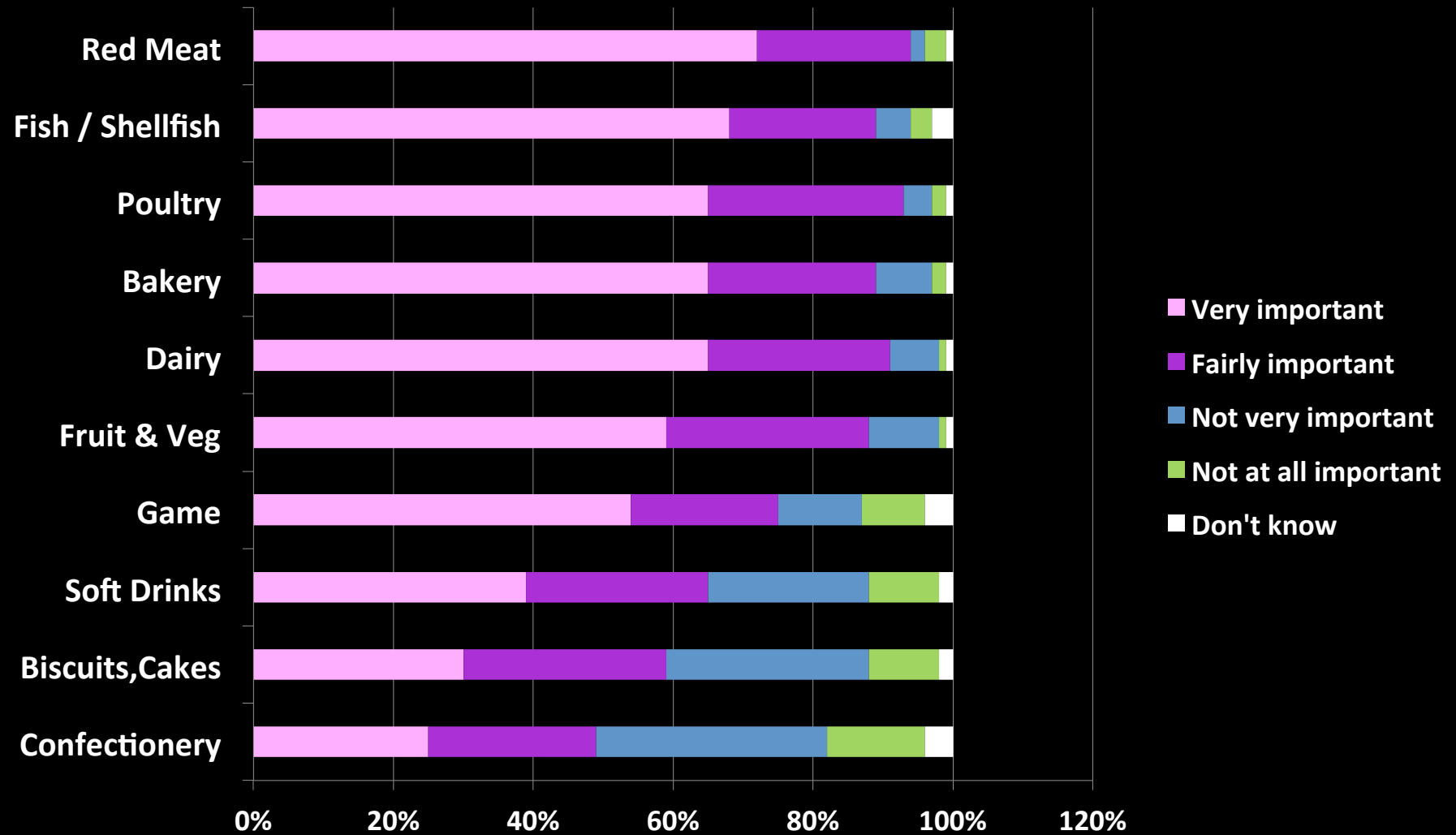




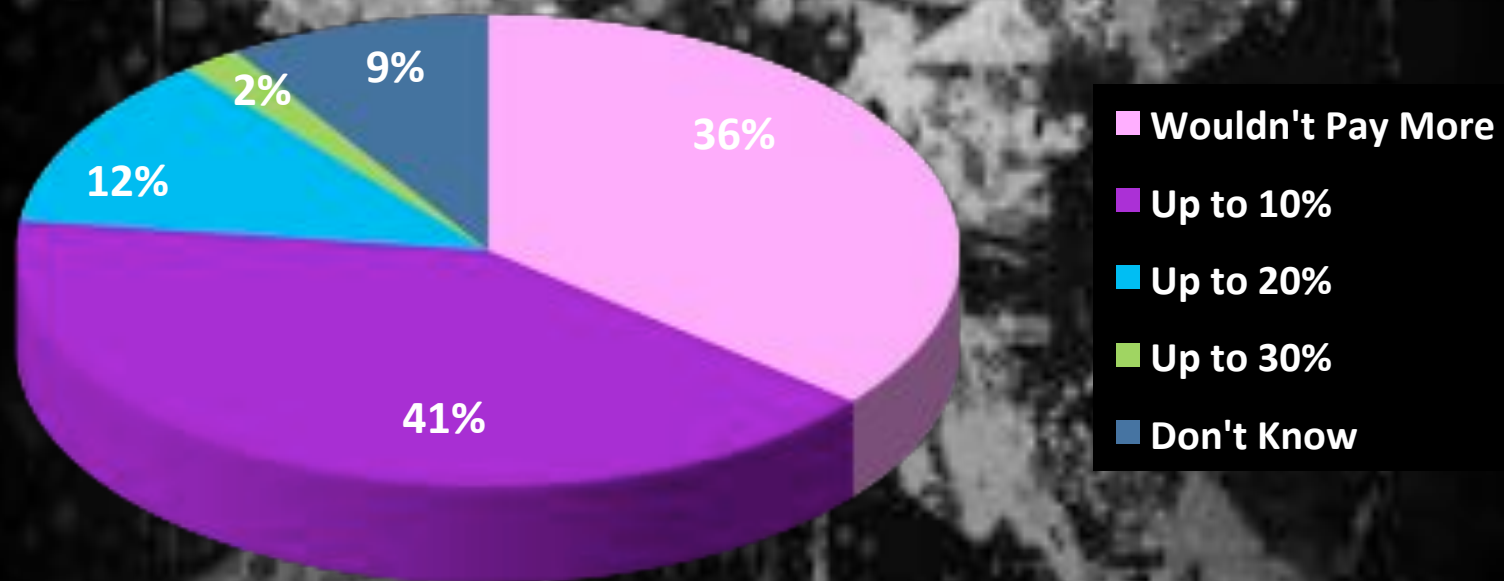
An aerial, black and white photograph of a forest. A large, light-colored 'X' is marked on the ground, formed by two intersecting paths or clearings. The word 'Provenance' is overlaid in white text on a dark rectangular background in the center of the image.

Provenance

Importance of Availability of Scottish Food and Drink:



Likelihood to Pay More for Scottish Products:



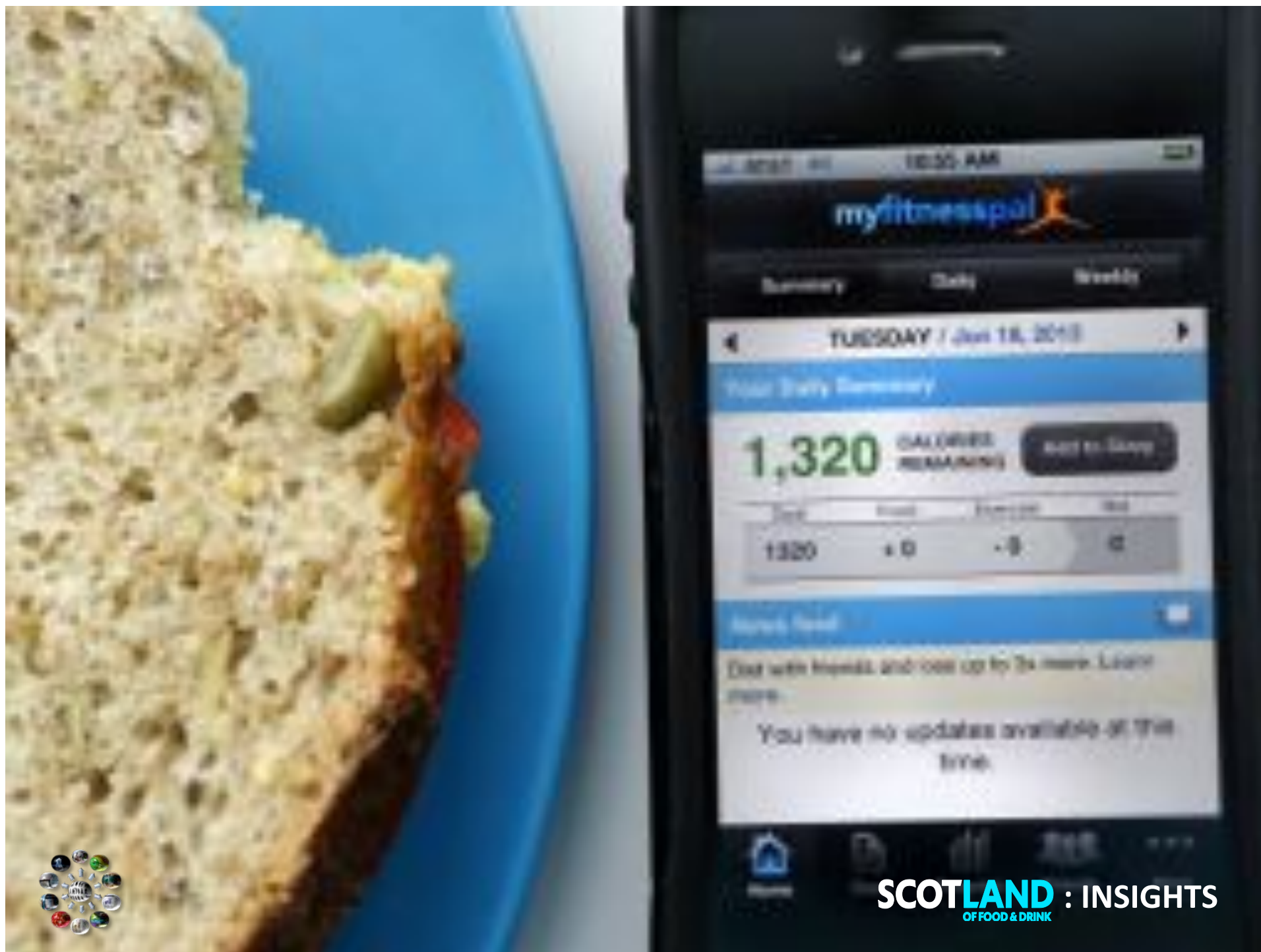
Drivers of store choice:

% stating important / v.important	GB	Scotland
Range of well known brands	45%	50%
Range of own label products	41%	33%



What else drives shopper behavior?







2014 & 2015

NEWS GLASGOW & WEST SCOTLAND

Home News 24 Hours Business Sports 24 Hours News Search

Advertisement: Local business, services, products, etc. (faded text)

Local business, services, products, etc. (faded text)

11:00 AM 4 pages

Commonwealth Games flag Scottish produce takes



Commonwealth Games flag Scottish produce takes

Commonwealth Games flag Scottish produce takes

Commonwealth Games flag Scottish produce takes

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Commonwealth Games flag Scottish produce takes

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Business News

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Sat 6th - Sun 21st
September 2014



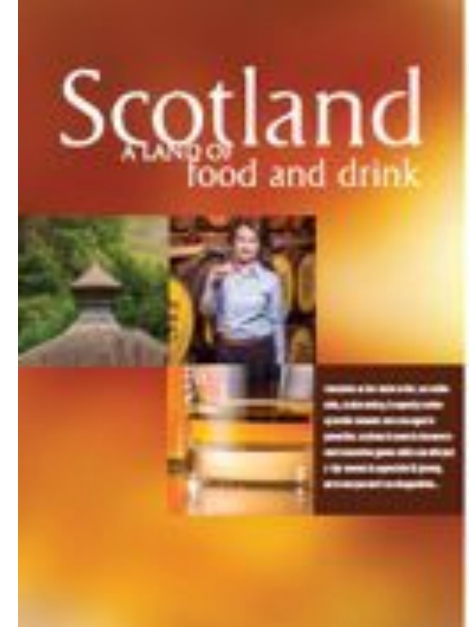
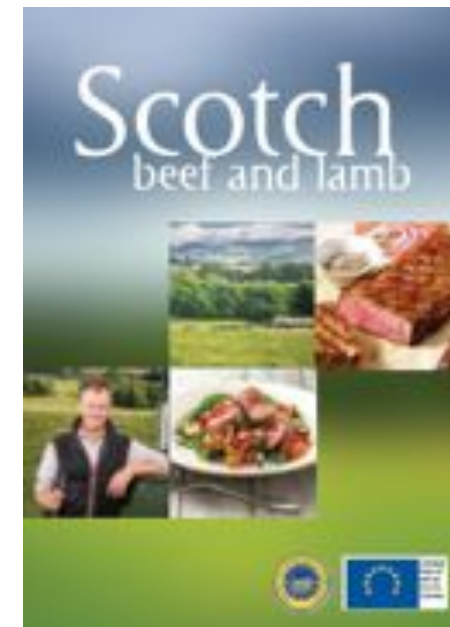
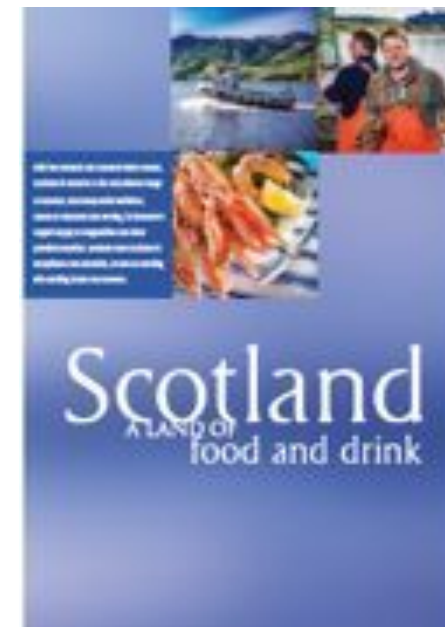
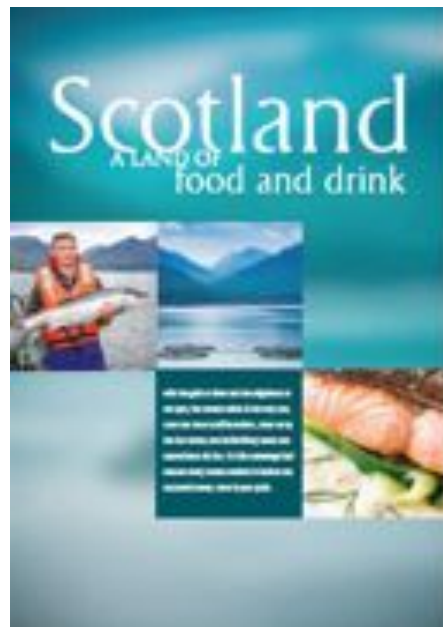
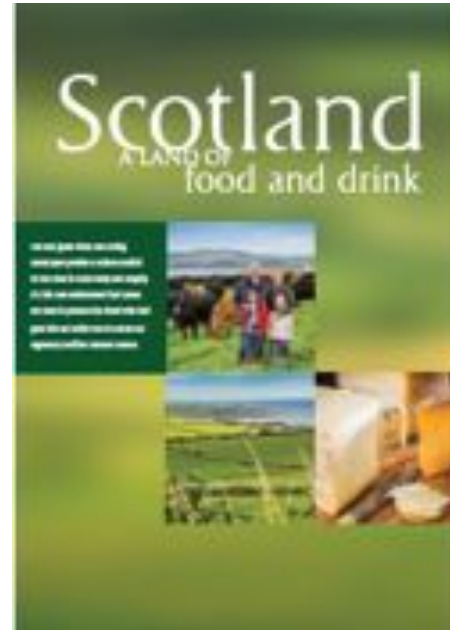
GLENEAGLES
SCOTLAND 2014



**YEAR OF
FOOD
& DRINK**
SCOTLAND 2015

Growing value, growing reputation

SCOTLAND
OF FOOD & DRINK





Scottish Venison Strategy Group



Thank you!

james.withers@scotlandfoodanddrink.org

twitter



@scotfoodjames



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OF FOOD & DRINK