

# Statistical Bulletin

## Economy Series

**AN OFFICIAL STATISTICS PUBLICATION FOR SCOTLAND**

### **SCOTLAND'S GLOBAL CONNECTIONS SURVEY 2009**

13<sup>th</sup> December 2010

#### **Introduction**

This Statistics Bulletin presents the main results of Scotland's Global Connections Survey<sup>1</sup> for 2009. This is the only export survey covering all sectors of the Scottish economy. Figures are not adjusted for inflation. Companies provided financial and sales information relating to 2009. International exports are shown by industry and destination and comparisons are made with the value of Scottish exports from 2005 onwards. Rest of UK exports and total exports (combining International and Rest of UK) are presented in Annexes A and B.

#### **Key points**

- Scottish international exports in 2009 (excluding oil and gas) are provisionally estimated at £21.1 billion, of which £13.2 billion is attributable to manufacturing sector companies. This represents an increase in overall exports £535 million since 2008, primarily due to a rise in the service sector exports of £710 million and a combined rise in exports from the agriculture, forestry & fishing sector and the mining, quarrying & extraction of petroleum sector of £310 million. Whereas the manufacturing sector exports declined by -£450 million.
- The top 5 exporting industries in 2009 are food & beverages (£3.6 billion), chemicals (including refined petroleum products) (£2.7 billion), business services (£2.7 billion), electrical and instrument engineering (£2.0 billion) and the mechanical engineering sector (£1.5 billion). Together these industries accounted for well over half of total exports from Scotland.
- The USA continues to be Scotland's top export destination with an estimated £3.3 billion of exports in 2009, an increase of £350 million since 2008. Exports to Netherlands decreased by -£350 million in 2009, estimated to be worth £2 billion making it Scotland's second top export destination.

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<sup>1</sup> The Global Connections Survey was carried out by the Scottish Government with support from Scottish Development International. Results are based on data received from around 2,300 companies, supplemented with previous years and partial information obtained from other sources.

- An estimated £9.6 billion of all Scottish exports are destined for the EU. Within the EU, the Netherlands is the largest market, followed by France (£1.6 billion exports in 2009).
- The top five export markets (USA, Netherlands, France, Germany and Belgium) accounted for £9.0 billion of exports (43% of all exports) from Scotland.
- Rest of UK exports in 2009 (excluding oil and gas) are provisionally estimated at £44.5 billion, of which £25.8 billion is attributable to service sector companies and £12.7 billion is attributable to manufacturing sector companies. The increase in overall rest of UK exports of £1.7 billion since 2008, is due to a rise in the manufacturing sector rest of UK exports of £990 million, and a rise of £750 million in the electricity, gas & water supply sector and a combined rise in exports from the agriculture, forestry & fishing sector and the mining, and quarrying & extraction of petroleum sector of £580 million. The service sector exports declined by -£290 million and construction also declined by -£370 million.
- The combined value of international and rest of UK exports in 2009 (excluding oil and gas) are provisionally estimated at £65.6 billion, of which £32.5 billion is attributable to service sector companies and of which £25.9 billion is attributable to manufacturing sector companies. The increase in total exports of £2.2 billion since 2008, is due to a combined rise in exports from the agriculture, forestry & fishing sector and the mining, and quarrying & extraction of petroleum sector of £895 million and a rise of £750 million in the electricity, gas & water supply sector and a rise in the manufacturing sector rest of UK exports of £540 million and the service sector exports rose by £425 million. The construction sector declined by -£410 million.

### International Exports by Broad Industry Sector & Trade Area

In 2009, total Scottish international exports are provisionally estimated to be £21.1 billion, of which around 63 per cent (£13.2 billion) are attributable to manufacturing companies. It is estimated that the service sector accounted for £6.7 billion of exports (32 per cent). The value of exports destined for countries within the European Union is estimated at £9.6 billion with a further £10.6 billion to the rest of the world.

**Table 1: Scottish Exports by sector and trade area (£million), 2009**

|  | EU27         | Non-EU        | Total exports |
|--|--------------|---------------|---------------|
| Agriculture, Forestry & Fishing <sup>1</sup> | 155          | 90            | 300           |
| Production <sup>2,3</sup> & Construction     | 6,955        | 7,160         | 14,115        |
| <i>of which manufacturing</i>                | 6,695        | 6,525         | 13,225        |
| Services <sup>4</sup>                        | 2,480        | 3,405         | 6,725         |
| <b>TOTAL</b>                                 | <b>9,590</b> | <b>10,655</b> | <b>21,140</b> |

Notes:

1. The total exports figure includes £55m of exports which could not be allocated to a region.
2. Excludes the value of oil & gas extracted from the UK Continental Shelf, see Notes.
3. Includes manufacturing, mining & quarrying and electricity/gas/water supply.
4. EU27 and Non-EU estimates exclude exports from some service sector industries - SICs 61, 62, 65, 66 and 90 (see Note 6). The exports figure includes £840m of exports which could not be allocated to a region.

**Table 2: Total International exports by industry (£million), 2005 – 2009**

| Industry Groupings (2 Digit SIC Division Groups) |  | Total International Exports (£million) |               |               |               |               |
|--|--|--|---------------|---------------|---------------|---------------|
|  |  | 2005                                   | 2006          | 2007          | 2008          | 2009          |
| 01, 02, 05                                       | Agriculture, Forestry & Fishing  | 225                                    | 205           | 215           | 220           | 300           |
| 10, 11, 13, 14                                   | Mining, Quarrying & Extraction of Petroleum  | 455                                    | 435           | 715           | 570           | 805           |
| 15   | Manufacture of Food Products and Beverages   | 2,600                                  | 2,625         | 3,040         | 3,285         | 3,615         |
| 15.91  | <i>Of Which Manufacture of Distilled Potable Alcoholic Beverages</i>   | 2,125                                  | 2,140         | 2,580         | 2,825         | 3,130         |
| 17, 18, 19                                       | Manufacture of Textiles, Footwear, Leather & Clothing Products   | 355                                    | 370           | 355           | 345           | 300           |
| 21,22  | Manufacture of Paper, Print and Publishing   | 415                                    | 400           | 410           | 390           | 410           |
| 23, 24   | Manufacture of Coke, Refined Petroleum Products & Nuclear Fuel, Manufacture of Chemicals & Chemical Products | 2,535                                  | 2,655         | 2,885         | 3,450         | 2,675         |
| 27, 28   | Manufacture of Metals and Metal Products   | 525                                    | 675           | 770           | 825           | 870           |
| 29   | Mechanical Engineering   | 975                                    | 1,000         | 1,180         | 1,360         | 1,495         |
| 30, 31,32,33                                     | Electrical and Instrument Engineering  | 2,750                                  | 2,540         | 2,355         | 2,185         | 2,040         |
| 34, 35   | Manufacture of Transport Equipment   | 860                                    | 950           | 1,010         | 1,035         | 1,000         |
| 20, 25,26,36,37                                  | Other Manufacturing Industries   | 755                                    | 770           | 775           | 800           | 815           |
| 40, 41   | Electricity, Gas & Water Supply  | 0                                      | 0             | 0             | 0             | 0             |
| 45   | Construction   | 160                                    | 130           | 50            | 130           | 90            |
| 50, 51, 52, 55                                   | Wholesale <sup>1</sup> , Retail & Repairs, Hotels & Restaurants  | 1,085                                  | 1,315         | 1,210         | 1,435         | 1,395         |
| 60, 61, 62, 63                                   | Land, Water & Air Transport & Auxiliary Transport Activities   | 565                                    | 770           | 695           | 815           | 800           |
| 64   | Post & Telecommunication   | 150                                    | 150           | 185           | 175           | 180           |
| 65, 66, 67                                       | Financial Intermediation   | 1,060                                  | 1,115         | 640           | 535           | 940           |
| 70, 71   | Real Estate & Renting of Equipment   | 115                                    | 195           | 240           | 315           | 335           |
| 72, 73, 74                                       | Business Services <sup>2</sup>   | 1,750                                  | 1,915         | 2,010         | 2,365         | 2,675         |
| 80   | Education  | 270                                    | 295           | 270           | 310           | 365           |
| 85, 90, 92, 93                                   | Other Services <sup>3</sup>  | 35                                     | 45            | 40            | 70            | 40            |
|  | <b>Total International Exports</b>   | <b>17,645</b>                          | <b>18,550</b> | <b>19,050</b> | <b>20,610</b> | <b>21,140</b> |

Notes:

1. Wholesale figures include the wholesale of agricultural products, fish and crustaceans &amp; molluscs.

2. Business Services include the following activities: computer and related activities; research &amp; development; legal, accounting, book-keeping and auditing activities; tax consultancy; market research; public opinion polling; business and management consultancy.

3. 'Other Services' includes the following activities: Health and other community activities, social and personal service activities.

The top 5 exporting industries in 2009 are food & beverages (£3.6 billion), chemicals (including refined petroleum products) (£2.7 billion), business services (£2.7 billion), electrical and instrument engineering (£2.0 billion), and the wholesale, retail & accommodation sector (£1.4 billion). Together these industries accounted for well over half of total exports from Scotland.

Manufacturing exports are estimated at £13.2 billion (63 per cent of total exports). The manufacture of food and drink sector estimated at £3.6 billion dominates the manufacturing exports and chemicals (including refined petroleum products) sector estimated at £2.7 billion. The whisky industry contributes around £3.1 billion, a rise of £305 million since 2008.

Exports from the service sector increased from 2008 by £710 million to £6.7 billion, largely explained by rises in business services and financial intermediation.

## Export Destinations

Table 3 shows estimates of exports to international destinations. Of the allocable figures, exports to the EU between 2008 and 2009 grew by £15 million. Exports to North America increased (+£290 million) over the period. Exports to Asia declined the most over the period (-£220 million).

**Table 3: Exports by geographic region<sup>1</sup> (£million), 2005 – 2009**

| Destination               | Total Exports (£millions) |               |               |               |               |
|---------------------------|---------------------------|---------------|---------------|---------------|---------------|
|                           | 2005                      | 2006          | 2007          | 2008          | 2009          |
| European Union 27         | 8,395                     | 8,110         | 9,105         | 9,575         | 9,590         |
| Rest of Europe            | 1,430                     | 1,645         | 1,630         | 1,735         | 1,795         |
| North America             | 2,845                     | 3,045         | 3,015         | 3,215         | 3,505         |
| Central and South America | 490                       | 590           | 655           | 815           | 790           |
| Middle East               | 770                       | 860           | 760           | 1,075         | 1,020         |
| Asia                      | 1,785                     | 2,200         | 2,160         | 2,290         | 2,070         |
| Africa                    | 690                       | 720           | 835           | 960           | 1,050         |
| Australasia               | 180                       | 255           | 250           | 325           | 325           |
| Unallocable               | 1,060                     | 1,125         | 640           | 620           | 995           |
| <b>Total</b>              | <b>17,645</b>             | <b>18,550</b> | <b>19,050</b> | <b>20,610</b> | <b>21,140</b> |

Note: The estimates for regions exclude exports from SICs 61, 62, 65, 66 and 90, see Note 6

Table 4 shows the top 10 markets for Scottish exports. The USA continued to be the top export destination which accounted for an estimated £3.3 billion of exports (15.5 per cent of total exports). This is followed by Netherlands with an estimated £2.0 billion (9.6 per cent of the total), then France with an estimated £1.6 billion (7.5 per cent of the total), and Germany with £1.3 billion (6.1 per cent of the total). The top 10 export destinations accounted for 58 per cent of total exports.

These data are dependent on survey responses and some companies have indicated they operated as toll manufacturers so these destinations are not the final destination of the products. Please see Notes 6 and 7 for further clarification with these data. These results are indicative only and should be used with caution.

**Table 4: Top 10 export destinations (£million), 2005 – 2009**

| Rank | 2005        |               | 2006        |               | 2007        |               | 2008        |               | 2009        |               |
|------|-------------|---------------|-------------|---------------|-------------|---------------|-------------|---------------|-------------|---------------|
|      | Destination | Total Exports | Destination | Total Exports | Destination | Total Exports | Destination | Total Exports | Destination | Total Exports |
| 1    | USA         | 2,565         | USA         | 2,765         | USA         | 2,710         | USA         | 2,935         | USA         | 3,285         |
| 2    | Netherlands | 1,780         | Netherlands | 1,455         | Netherlands | 1,900         | Netherlands | 2,380         | Netherlands | 2,030         |
| 3    | France      | 1,180         | France      | 1,080         | Germany     | 1,275         | France      | 1,520         | France      | 1,580         |
| 4    | Germany     | 1,160         | Belgium     | 1,080         | France      | 1,210         | Germany     | 1,170         | Germany     | 1,285         |
| 5    | Belgium     | 930           | Germany     | 1,015         | Belgium     | 1,045         | Spain       | 765           | Belgium     | 840           |
| 6    | Eire        | 665           | Eire        | 730           | Spain       | 670           | Belgium     | 760           | Norway      | 760           |
| 7    | Spain       | 620           | Switzerland | 620           | Eire        | 640           | Eire        | 735           | Spain       | 760           |
| 8    | Italy       | 520           | Spain       | 595           | Italy       | 610           | Norway      | 570           | Eire        | 660           |
| 9    | Switzerland | 490           | Italy       | 505           | Switzerland | 590           | Italy       | 560           | Italy       | 535           |
| 10   | Norway      | 405           | Norway      | 450           | Norway      | 475           | Switzerland | 530           | Switzerland | 465           |

## Burden on Respondents

The 2009 survey asked respondents to indicate how long the survey form took to complete and the cost to the business of completion. Around 1,700 respondents provided some response. Respondents seemed more willing to provide time information than costs.

Of those respondents who provided a time, 75% reported it took less than or equal to 30 minutes to complete the form, 90% reported it took less than or equal to 1 hour to complete the form. One respondent indicated the form took 20 hours to complete. The median was 20 minutes to complete.

Of those respondents who provided a cost, 84% reported it cost their organisation less than or equal to £60 to complete the form. One respondent indicated the form cost £5,500 for their organisation to complete. The median cost to the respondents business was £20 to complete.

Of those respondents who provided both a cost and a time, 70% reported a cost to their organisation of less than or equal to an hourly rate of £80/hour to complete the form. The respondent's hourly rates varied from £4/hour to £2,000/hour for their organisation to complete the form. The median cost rate to the respondents business was £40/hour to complete. Calculating an average cost based on an hourly rate for those respondents providing both cost and time and applying this to those responses who provided a time to complete allows an estimate of burden for those companies who respondent, this approximates to £79,000. This is the cost to the respondents organisations. The cost of printing, distribution, processing and analysis is a further additional cost.

**Table 5 Respondents Burden**

| Variable                  | Number of respondents providing data | Total  | Minimum | Maximum | Average | Median |
|---------------------------|--------------------------------------|--------|---------|---------|---------|--------|
| Cost in £'s               | 920                                  | 46,348 | 1       | 5,500   | 50.38   | 20     |
| Time in minutes           | 1,713                                | 58,848 | 1       | 1,200   | 34.35   | 20     |
| Average cost (£ per hour) | 917                                  | 73,873 | 4       | 2,000   | 80.56   | 40     |

## Acknowledgments

These statistics have been prepared by the Scottish Government, Office of the Chief Economic Adviser in collaboration with Scottish Development International. We would like to thank all of the companies that responded to the survey and all those who have been involved in the survey for their help and advice, and in particular Scottish Development International and Highlands & Islands Enterprise.

For this publication we are grateful to: the Committee of Scottish Clearing Bankers who supplied information to help with the Financial Intermediation sector; Life Long Learning Statistics for information on students within Further Education; Marine Statistics for Sea Fisheries data. HMRC UK Trade Info has also been used to supplement missing data. Department of Energy and Climate Change (DECC) whose publication the Digest of United Kingdom Energy Statistics (DUKES) 2009 provided energy information.

## ANNEX A

**Table 6: Rest of UK exports by industry (£million), 2005 – 2009**

| Industry Groupings (2 Digit SIC Division Groups) |  | Total Rest of UK Exports (£million) |               |               |               |               |
|--|--|-------------------------------------|---------------|---------------|---------------|---------------|
|  |  | 2005                                | 2006          | 2007          | 2008          | 2009          |
| 01, 02, 05                                       | Agriculture, Forestry & Fishing  | 480                                 | 505           | 505           | 555           | 625           |
| 10, 11, 13, 14                                   | Mining, Quarrying & Extraction of Petroleum  | 720                                 | 890           | 1,135         | 1,460         | 1,975         |
| 15   | Manufacture of Food Products and Beverages   | 2,755                               | 2,940         | 2,810         | 2,765         | 3,340         |
| 15.91  | <i>Of Which Manufacture of Distilled Potable Alcoholic Beverages</i>   | 615                                 | 705           | 640           | 620           | 815           |
| 17, 18, 19                                       | Manufacture of Textiles, Footwear, Leather & Clothing Products   | 335                                 | 310           | 340           | 305           | 285           |
| 21,22  | Manufacture of Paper, Print and Publishing   | 995                                 | 895           | 850           | 840           | 890           |
| 23, 24   | Manufacture of Coke, Refined Petroleum Products & Nuclear Fuel, Manufacture of Chemicals & Chemical Products | 640                                 | 615           | 1,730         | 2,085         | 2,250         |
| 27, 28   | Manufacture of Metals and Metal Products   | 785                                 | 935           | 1,105         | 1,075         | 1,215         |
| 29   | Mechanical Engineering   | 625                                 | 620           | 685           | 770           | 710           |
| 30, 31,32,33                                     | Electrical and Instrument Engineering  | 1,250                               | 1,240         | 1,110         | 1,165         | 1,160         |
| 34, 35   | Manufacture of Transport Equipment   | 1,100                               | 1,125         | 1,500         | 1,585         | 1,770         |
| 20, 25,26,36,37                                  | Other Manufacturing Industries   | 1,100                               | 1,045         | 1,130         | 1,110         | 1,075         |
| 40, 41   | Electricity, Gas & Water Supply  | 1,655                               | 2,320         | 2,045         | 1,470         | 2,220         |
| 45   | Construction   | 1,180                               | 1,200         | 1,635         | 1,530         | 1,155         |
| 50, 51, 52, 55                                   | Wholesale <sup>1</sup> , Retail & Repairs, Hotels & Restaurants  | 7,370                               | 7,280         | 8,180         | 7,900         | 7,970         |
| 60, 61, 62, 63                                   | Land, Water & Air Transport & Auxiliary Transport Activities   | 2,385                               | 2,330         | 2,210         | 2,075         | 2,340         |
| 64   | Post & Telecommunication   | 120                                 | 160           | 125           | 140           | 120           |
| 65, 66, 67                                       | Financial Intermediation   | 6,650                               | 8,175         | 11,575        | 10,910        | 10,260        |
| 70, 71   | Real Estate & Renting of Equipment   | 840                                 | 690           | 1,000         | 845           | 610           |
| 72, 73, 74                                       | Business Services <sup>2</sup>   | 3,305                               | 3,395         | 3,910         | 3,635         | 3,850         |
| 80   | Education  | 325                                 | 350           | 345           | 390           | 390           |
| 85, 90, 92, 93                                   | Other Services <sup>3</sup>  | 260                                 | 365           | 390           | 215           | 290           |
|  | <b>Total Rest of UK Exports</b>  | <b>34,875</b>                       | <b>37,385</b> | <b>44,320</b> | <b>42,830</b> | <b>44,495</b> |

Notes:

1. Wholesale figures include the wholesale of agricultural products, fish and crustaceans & molluscs.
2. Business Services include the following activities: computer and related activities; research & development; legal, accounting, book-keeping and auditing activities; tax consultancy; market research; public opinion polling; business and management consultancy.
3. 'Other Services' includes the following activities: Health and other community activities, social and personal service activities.

Rest of UK exports have to be interpreted with caution. The methodology used is exactly the same as for international exports, however companies have no statutory requirement to collate financial information below UK level. Previous articles discussing the issues with rest of UK exports information in more detail are available here <http://www.scotland.gov.uk/Publications/2007/07/18083820/8> <http://www.scotland.gov.uk/Publications/2005/11/2485808/58104>

Rest of UK exports in 2009 (excluding oil and gas) are provisionally estimated at £44.5 billion, of which £25.8 billion is attributable to service sector companies and £12.7 billion is attributable to manufacturing sector companies. The increase in overall rest of UK exports of £1.7 billion since 2008, is due to a rise in the manufacturing sector rest of UK exports of £990 million, and a rise of £750 million in the electricity, gas & water supply sector and a combined rise in exports from the agriculture, forestry & fishing sector and the mining, quarrying & extraction of petroleum sector of £580 million. The service sector exports declined by -£290 million and construction also declined by -£370 million.

The service sector rest of UK exports are estimated to be worth £25.8 billion (58 per cent of total rest of UK exports). Financial Intermediation is estimated at £10.3 billion

and dominates the sector representing 23 percent. The wholesale, retail & accommodation sector is estimated at £8.0 billion. Business services are estimated at £3.8 billion. The service sector declined from 2008 by -£290 million, largely due to Financial Intermediation. Manufacturing rest of UK exports is estimated at £12.7 billion (29 per cent of total rest of UK exports). Within manufacturing, the food and drink sector is the largest and is estimated at £3.3 billion. The manufacturing sector rose by £990 million from 2008, largely due to the food and drink sector. The electricity, gas & water supply sector is worth an estimated £2.2 billion in rest of UK exports.

## ANNEX B

**Table 7: Total exports (Rest of UK combined with International Exports) by industry (£million), 2005 – 2009**

| Industry Groupings (2 Digit SIC Division Groups)  |  | Exports (International plus Rest of UK) (£m) |               |               |               |               |
|---|--|--|---------------|---------------|---------------|---------------|
|   |  | 2005   | 2006          | 2007          | 2008          | 2009          |
| 01, 02, 05  | Agriculture, Forestry & Fishing  | 710  | 710           | 720           | 775           | 925           |
| 10, 11, 13, 14                                    | Mining, Quarrying & Extraction of Petroleum  | 1180   | 1325          | 1850          | 2035          | 2775          |
| 15  | Manufacture of Food Products and Beverages   | 5,355  | 5,565         | 5,850         | 6,045         | 6,950         |
| 15.91   | <i>Of Which Manufacture of Distilled Potable Alcoholic Beverages</i>   | 2,740  | 2,850         | 3,220         | 3,445         | 3,945         |
| 17, 18, 19  | Manufacture of Textiles, Footwear, Leather & Clothing Products   | 690  | 680           | 695           | 655           | 585           |
| 21,22   | Manufacture of Paper, Print and Publishing   | 1,410  | 1,290         | 1,255         | 1,230         | 1,300         |
| 23, 24  | Manufacture of Coke, Refined Petroleum Products & Nuclear Fuel, Manufacture of Chemicals & Chemical Products | 3,175  | 3,270         | 4,610         | 5,540         | 4,925         |
| 27, 28  | Manufacture of Metals and Metal Products   | 1,310  | 1,610         | 1,875         | 1,900         | 2,085         |
| 29  | Mechanical Engineering   | 1,600  | 1,620         | 1,865         | 2,125         | 2,200         |
| 30, 31,32,33                                      | Electrical and Instrument Engineering  | 4,005  | 3,780         | 3,465         | 3,350         | 3,205         |
| 34, 35  | Manufacture of Transport Equipment   | 1,960  | 2,075         | 2,510         | 2,620         | 2,770         |
| 20, 25,26,36,37                                   | Other Manufacturing Industries   | 1,855  | 1,815         | 1,905         | 1,905         | 1,895         |
| 40, 41  | Electricity, Gas & Water Supply  | 1,655  | 2,320         | 2,045         | 1,470         | 2,220         |
| 45  | Construction   | 1,340  | 1,330         | 1,690         | 1,655         | 1,245         |
| 50, 51, 52, 55                                    | Wholesale <sup>1</sup> , Retail & Repairs, Hotels & Restaurants  | 8,455  | 8,595         | 9,390         | 9,335         | 9,365         |
| 60, 61, 62, 63                                    | Land, Water & Air Transport & Auxiliary Transport Activities   | 2,950  | 3,095         | 2,905         | 2,885         | 3,140         |
| 64  | Post & Telecommunication   | 270  | 305           | 310           | 315           | 300           |
| 65, 66, 67  | Financial Intermediation   | 7,710  | 9,290         | 12,215        | 11,445        | 11,195        |
| 70, 71  | Real Estate & Renting of Equipment   | 955  | 880           | 1,240         | 1,165         | 945           |
| 72, 73, 74  | Business Services <sup>2</sup>   | 5,055  | 5,310         | 5,920         | 6,000         | 6,525         |
| 80  | Education  | 600  | 645           | 620           | 700           | 750           |
| 85, 90, 92, 93                                    | Other Services <sup>3</sup>  | 295  | 405           | 430           | 285           | 330           |
| <b>Total Rest of UK and International Exports</b> |  | <b>52,520</b>                                | <b>55,935</b> | <b>63,370</b> | <b>63,440</b> | <b>65,635</b> |

Notes:

1. Wholesale figures include the wholesale of agricultural products, fish and crustaceans & molluscs.
2. Business Services include the following activities: computer and related activities; research & development; legal, accounting, book-keeping and auditing activities; tax consultancy; market research; public opinion polling; business and management consultancy.
3. 'Other Services' includes the following activities: Health and other community activities, social and personal service activities.

All words of caution expressed above about use of rest of UK information will apply to the combined value of international and rest of UK exports.

The combined value of international and rest of UK exports in 2009 (excluding oil and gas) are provisionally estimated at £65.6 billion, of which £32.5 billion is attributable to service sector companies and of which £25.9 billion is attributable to manufacturing sector companies. The increase in total exports of £2.2 billion since 2008, is due to a combined rise in exports from the agriculture, forestry & fishing sector and the mining, quarrying & extraction of petroleum sector of £895 million and a rise of £750 million in the electricity, gas & water supply sector and a rise in the manufacturing sector rest of UK exports of £540 million and the service sector exports rose by £425 million. The construction sector declined by -£410 million.

The service sector total exports are estimated at £32.5 billion (50 per cent of the total exports). This increased from 2008 by £425 million largely explained by rises in business services. Manufacturing total exports are estimated at £25.9 billion (39 per cent of total rest of UK and international exports). This increased from 2008 by £540

million largely explained by rises food and drink. The electricity, gas & water supply sector is worth an estimated £2.2 billion in rest of UK exports.

NOTE: This data has been calculated using the Department of Energy and Climate Change (DECC) publication the Digest of United Kingdom Energy Statistics (DUKES) 2009, this contains figures up to 2008, so the 2008 data has been carried forward for 2009 data. Once the 2010 DUKES publication is available revised Rest of UK data will be made available. The Scotland Performs target will be published at that time.

## Notes:

1. A representative sample of 5,570 businesses operating in Scotland was invited to participate in this voluntary survey, and responses (including nil responses) were received from around 2,300 companies. The exports results are supplemented with data from UK surveys carried out by the Office for National Statistics (ONS).
2. Estimates for previous years have been revised from those published last year and are largely due to improved data provided by Life Long Learning Statistics for information on students within Further Education, this revised the Education sector data.

In addition to these, some revisions may occur where new information is provided by companies and these reflect improvements made possible by the availability of 8 years' survey responses. Further information on these can be found on the website ([www.scotland.gov.uk/exports](http://www.scotland.gov.uk/exports)). The 2009 results are provisional, and may be revised in the future if improved information becomes available.

3. The Scottish Government also produces a quarterly Index of Manufactured Exports (IME) in real terms, to provide an indication of the up-to-date trends. These can also be accessed via the above website. GCS and IME information has been partially aligned and the 2010 Q3 IME release in January may be further aligned with these Global Connections Survey results.
4. In accordance with National Accounting principles, total Scottish exports do not include any exports of oil and gas extracted from the UK continental shelf, and so exclude companies classified as SIC 11.1. This is consistent with the approach taken in all Scottish economic statistics in that, following European System of Accounts (ESA 95) conventions and UK National Accounts principles, these are not allocated to any one region of the UK. Exports of services provided to the oil and gas industry are included under SIC 11.2 (although surveying and engineering consulting for the oil industry are within SIC 74).
5. Due to sampling variability and companies moving between industry sectors, estimates of changes over time in smaller industries should be treated with reasonable caution.
6. Destination estimates exclude SIC 61 (water transport), SIC 62 (air transport), SIC 65 (financial intermediation), SIC 66 (insurance and pension funding) and SIC 90 (sewage and refuse disposal). This is due to a lack of reliable company information for these industries. The total for these is shown as unallocable in table 3. Therefore rankings of individual countries should be treated as indicative.
7. Country results are subject to a higher degree of sampling error than industry estimates as they are based on less information provided by respondents. It is important to note that differences in the reported export markets of the companies responding to the survey could affect the year on year changes in the destination estimates, and that ranks of countries with similar exports estimates can change considerably. Further some companies operate as toll manufacturers indicating a one stop destination in the survey return. Other organisations change markets to increase profitability this also can affect trends across time.
8. International estimates provided here relate to exports to destinations out with the UK. Estimates of intra UK trade for the period 2002 – 2009, referred to as Rest of UK is presented in Annex A. The combined total of international and rest of UK exports used in National Indicator (Grow Exports at a faster average rate than GDP) performance is also provided in Annex B. Further information on these can be found on the Scotland Performs website <http://www.scotland.gov.uk/About/scotPerforms/indicators/growExports>
9. Figures for 2002 are based on the 1992 Standard Industrial Classification (SIC) of economic activities. Figures for 2003 onwards are based on the 2003 UK SIC. The changes between these are only at the detailed level of industrial classification and will not affect total industry results shown.
10. The value of exports of fishing (SIC 5.01) relating to direct sales of fish abroad has been provided by the Scottish Government Rural and Environment Research & Analysis Directorate and is not derived from Scotland's Global Connections Survey (GCS).

11. The figures given in tables have been independently rounded and may not always sum to the relevant sub-totals or totals.
12. There is no comparable UK survey. However HM Revenue & Customs (HMRC) are responsible for collecting the UK's international trade in goods data, which are published as two National Statistics series - the 'Overseas Trade Statistics (OTS) of the UK' and the 'UK Regional Trade Statistics (RTS)'. The OTS is published monthly, providing detailed data for over 9,000 commodities and 200 partner countries. The RTS are published quarterly showing trade at summary product and country level, split by UK regions. There are available from UKTradeInfo website:  
[https://www.uktradeinfo.com/index.cfm?task=td\\_regstats\\_press](https://www.uktradeinfo.com/index.cfm?task=td_regstats_press)
13. Further information and tables on GCS to download are available from the following Scottish Government website: <http://www.scotland.gov.uk/exports>.

**Next Publication:**

**December 2011**

**Issued by:**

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