



Scotland

A LAND OF
food and drink



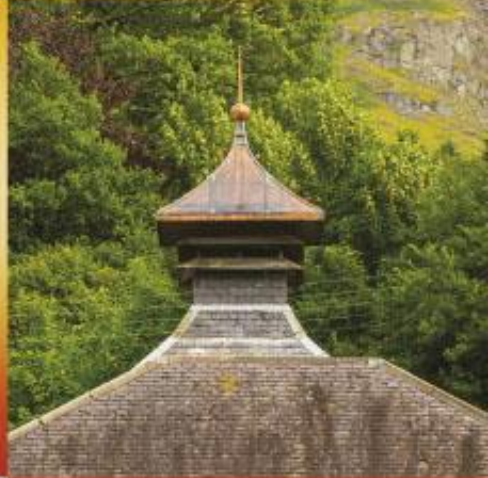
**James Withers
Chief Executive**

**Collaboration in Food
& Drink: Scotland's
Story**



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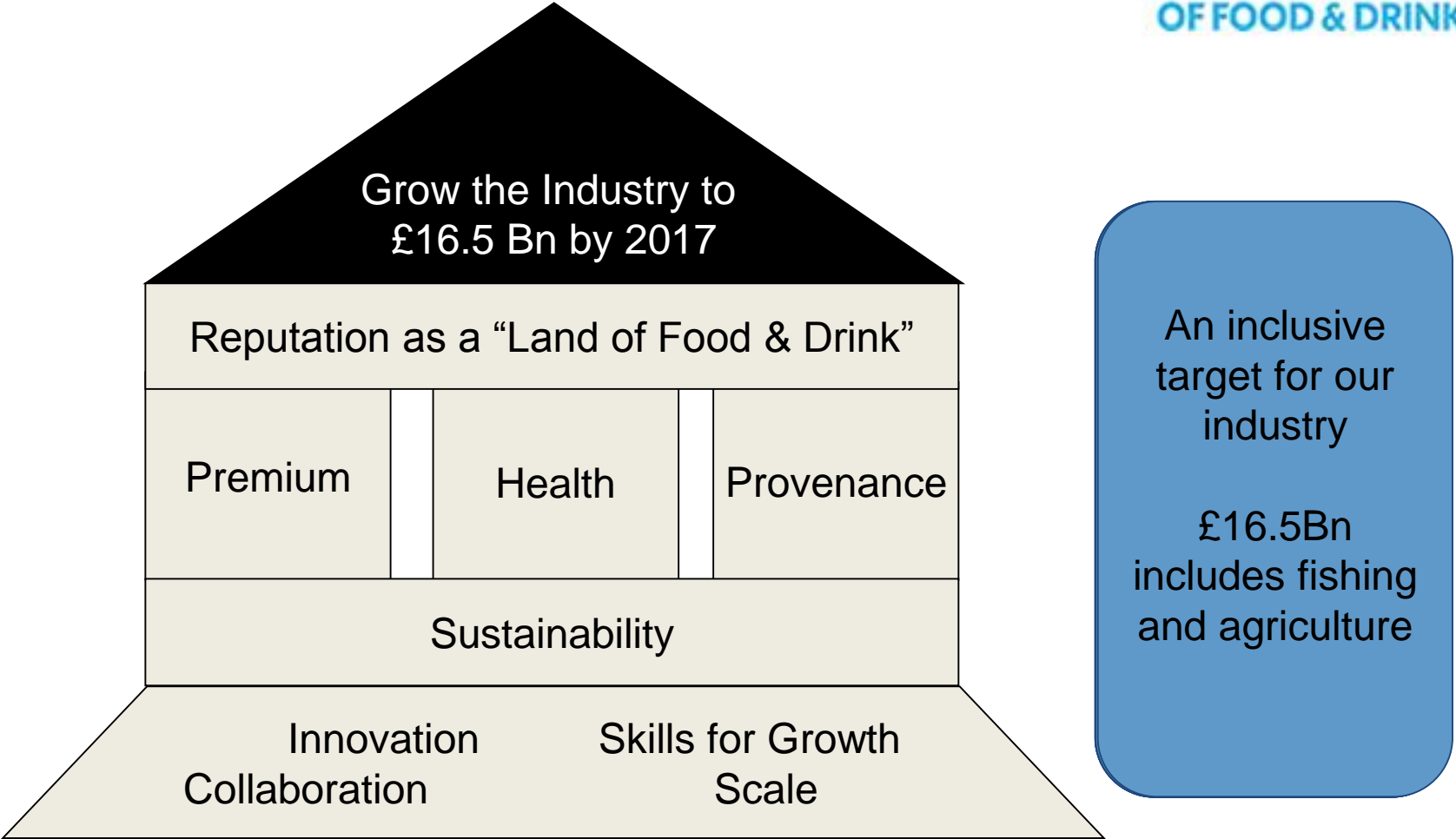


How do we harness potential?



SCOTLAND
OF FOOD & DRINK





A STRATEGY FOR GROWTH

Turnover



Research & Development Spend



Total F&D Exports





£14.3bn

RECORD FOOD AND
DRINK INDUSTRY TURNOVER



x2
SCOTTISH FOOD AND DRINK
MANUFACTURING GROWTH RATE
TWICE UK AVERAGE

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Change in UK market



Supermarket
62.8%

(GB – 63.9%)

Convenience
10.7%
(9%)

Internet
4.2%
(6.7%)

Discounters
9.3%
(8.3%)

High
Street
12.9%
(12.1%)

Breakfast

12%

Late Evening

8%

Free WiFi

Mid-morning

39%

Dinner

13%

Lunch

35%

Mid-afternoon

37%



**YEAR OF
FOOD
& DRINK
SCOTLAND 2015**



GLENEAGLES
SCOTLAND **2014**

Growing value, growing reputation

SCOTLAND
OF FOOD & DRINK

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Growing internationally



Scotland's natural beauty is the way you feel and it's in the way you eat. Our produce is a mix of nature and tradition, as the finest ingredients are brought together to create a world of delicious food.

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From the natural ingredients, to the way you eat, our produce is a mix of nature and tradition. Our chefs and bakers are proud to create a world of delicious food.

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For you, your food is the way you feel and it's in the way you eat. Our produce is a mix of nature and tradition, as the finest ingredients are brought together to create a world of delicious food.

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When the light is just right, the colors are the way you feel and it's in the way you eat. Our produce is a mix of nature and tradition, as the finest ingredients are brought together to create a world of delicious food.

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Scotch

beef and lamb

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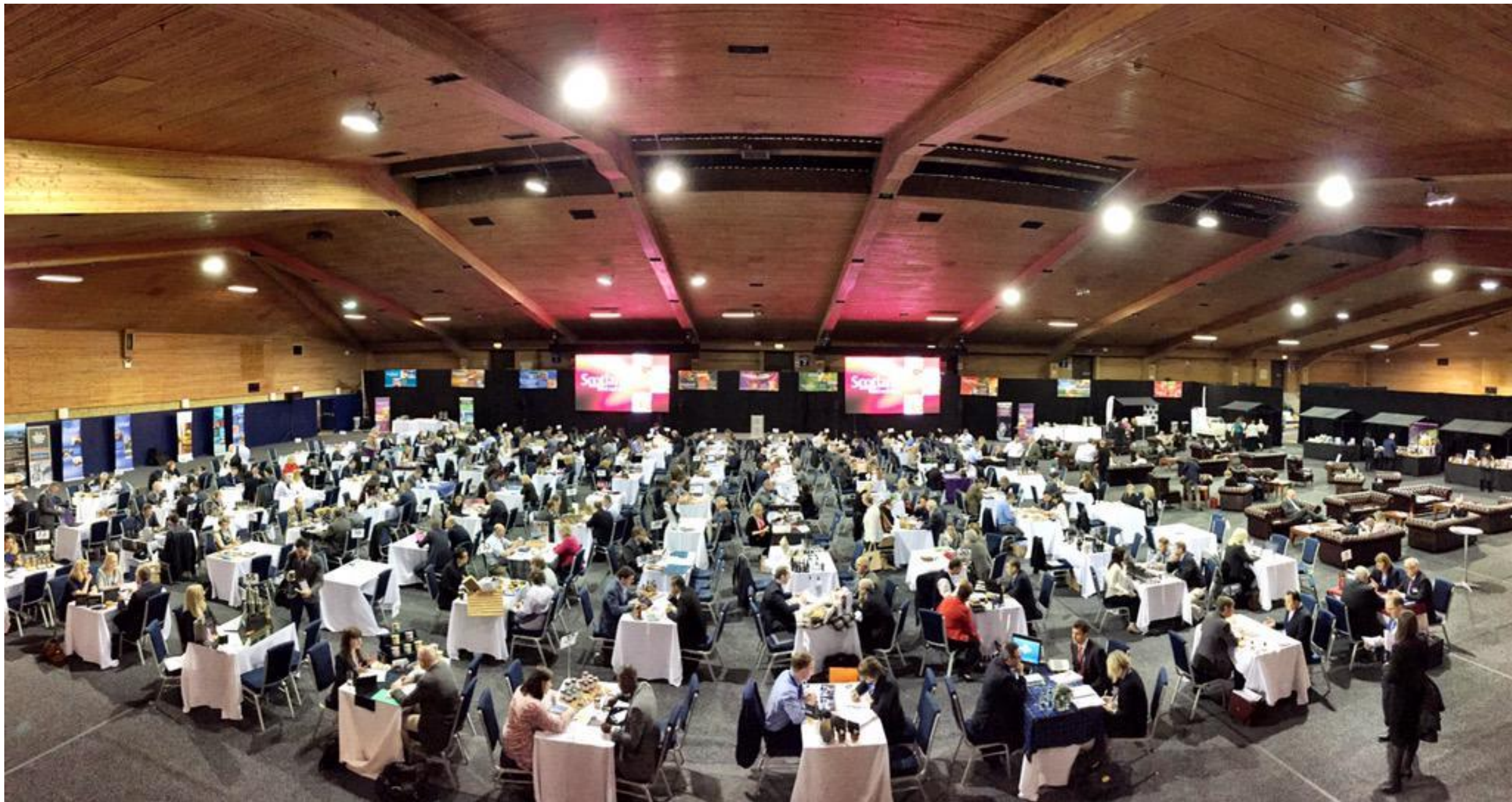
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Global Food & Drink Team – In Market Specialists





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The challenges for supply chains



PRODUCTIVITY

Work being done to align our Food & Drink 'Productivity Plan' to the newly launched Manufacturing Action Plan for Scotland.



*Skills Investment
Plan for Scotland's
Food and Drink Sector*

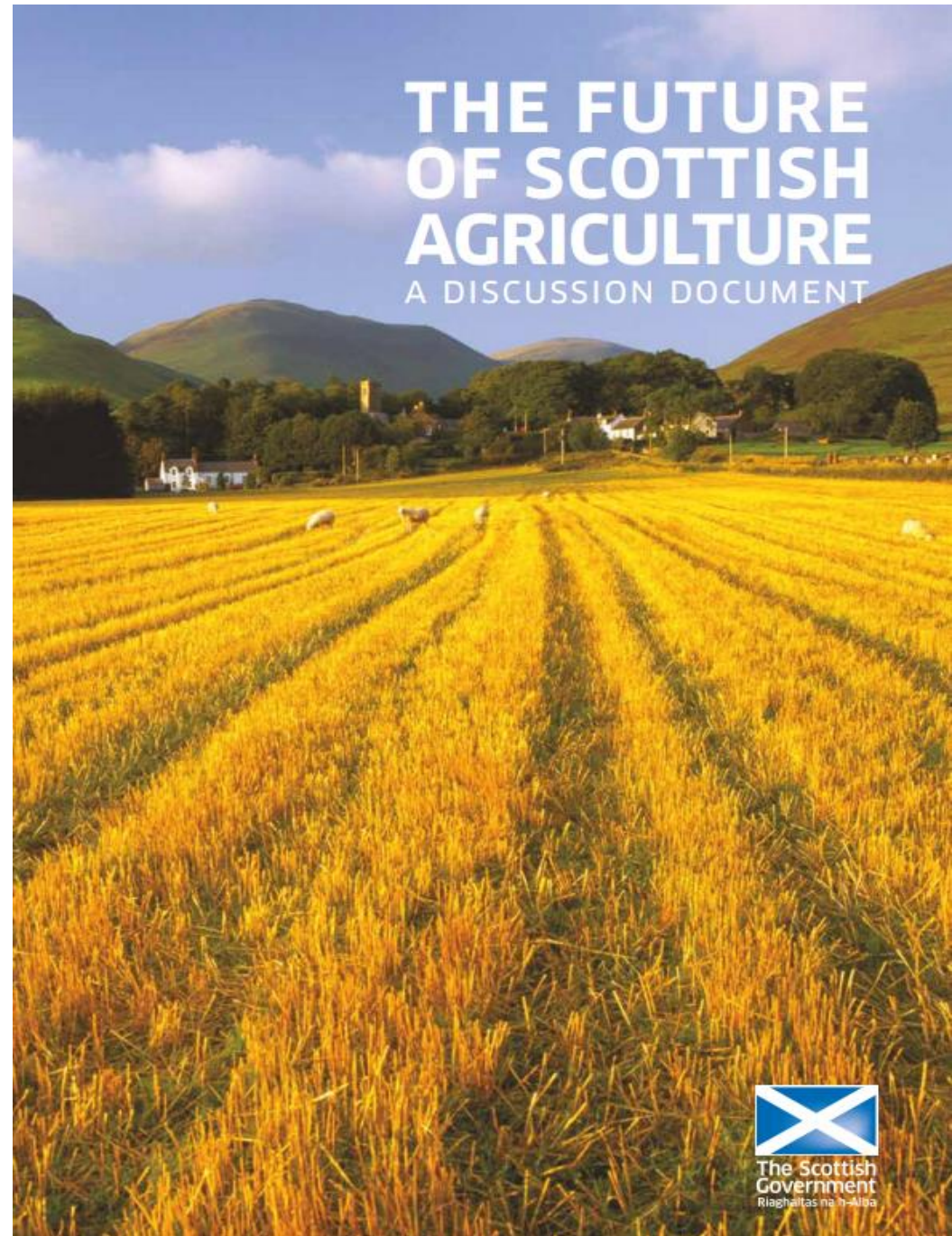


SKILLS

- Raising Profile of Industry to New Entrants
- Driving Leadership and Management Excellence
- Support for Business Improvement
- Support for Business Growth



Ensuring farmers are part of food and drink success







Thank you!

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