



# Scotch Whisky Sustainability Strategy

Morag Garden,  
Head of Sustainability & Innovation  
Scotch Whisky Association  
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# Scotch Whisky Association



The Scotch Whisky Association is the trade body for the Scotch Whisky industry.

- Established in 1912
- 70 company members, e.g. Diageo, Chivas, Edrington & William Grants
- Represent around 95% of industry production
- Our mission is to drive the best possible global business environment for Scotch Whisky, ensuring that Scotch is the world's undisputed premier whisky and consumers' spirit of choice.



## From humble beginnings...

First mention of Scotch Whisky was in 1494

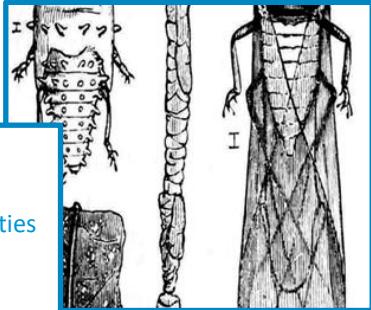
“Eight bolls of malt to Friar John Cor wherewith to make aqua vitae”

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# Building Blocks to Global Success...



Opportunities



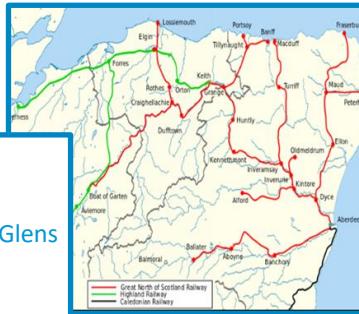
Innovation



Blood, sweat  
and tears



Lochs and Glens



# 2020: Top 10 Global Export Markets by Value and Volume



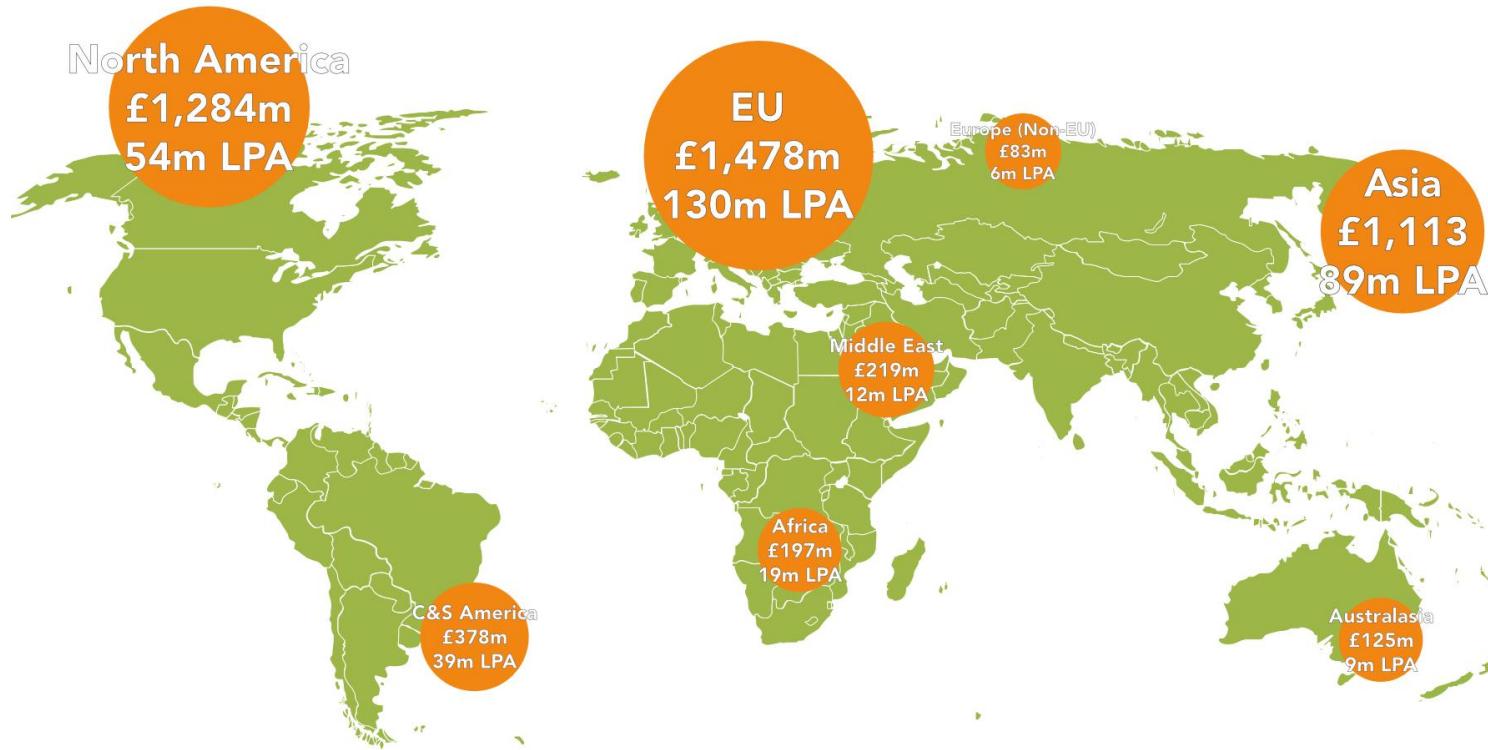
## TOP 10 MARKETS BY VALUE

	UNITED STATES £728.9m	▼ 31.8%
	FRANCE £375.3m	▼ 13.2%
	SINGAPORE £246.9m	▼ 17.5%
	TAIWAN £181.8m	▼ 11.4%
	LATVIA £175.9m	▲ 23.5%
	GERMANY £138.7m	▼ 24.8%
	JAPAN £114.9m	▼ 22.1%
	AUSTRALIA £113m	▼ 3.1%
	SPAIN £108.8m	▼ 39.5%
	CHINA £106.9m	▲ 20.4%

## TOP 10 MARKETS BY VOLUME

1.5% ▲	FRANCE 176m 70 cl bottles	
12.3% ▼	UNITED STATES 111.5m 70 cl bottles	
27.7% ▼	INDIA 94.5m 70cl bottles	
5.6% ▲	BRAZIL 45.2m 70cl bottles	
26.2% ▼	JAPAN 44.5m 70cl bottles	
14.3% ▼	GERMANY 42.5m 70cl bottles	
17.8% ▼	MEXICO 42.2m 70cl bottles	
11.9% ▲	LATVIA 39.1m 70cl bottles	
14.6% ▲	POLAND 37.4m 70cl bottles	
36.0% ▼	SPAIN 36.1m 70cl bottles	

# 2020: Scotch Whisky Exports by Global Region by Value





## A Modern Industry...

- 2019 marked the 525<sup>th</sup> anniversary of the industry and exports of Scotch reached £2bn for the first time
- The industry retains the craft and heritage of our past, but has employed modern industrial techniques
- Strong legal protection
- Robust environmental targets
- World-class tourist facilities



# Why: GLOBAL CONTEXT?



## CLIMATE CRISIS

## CHANGING CONSUMER PREFERENCES

## ORGANISATIONAL GOVERNANCE

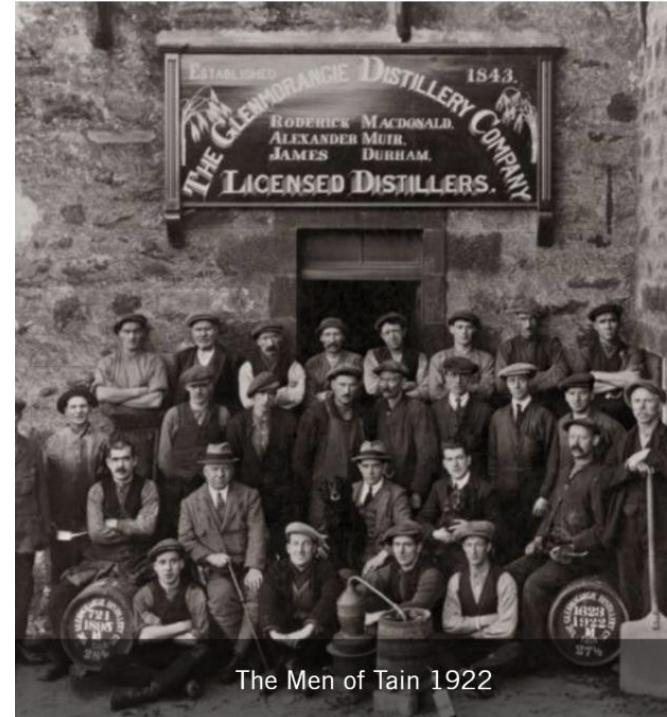
## REGULATION

## BUSINESS OPPORTUNITY

# Custodians of Scotch Whisky



- Collaboration
- Maturation (Long-term perspective)
- Sense of place
- History



# Scotch Whisky Sector Sustainability Strategy



2009  
Launch

Refresh in  
2016





# THE SCOTCH WHISKY SUSTAINABILITY STRATEGY

#SustainableScotch



BY 2040 THE SCOTCH WHISKY INDUSTRY  
WILL ACHIEVE NET ZERO EMISSIONS



ALL COMPANIES WITHIN A RESPONSIBLE  
WATER USE RANGE BY 2025



PLAYING AN ACTIVE ROLE IN THE WIDER  
CONSERVATION AND RESTORATION OF  
SCOTLAND'S PEATLAND



BY 2025 ALL NEW PACKAGING WILL  
BE REUSABLE, RECYCLABLE OR  
COMPOSTABLE







Ambitious; but Achievable

