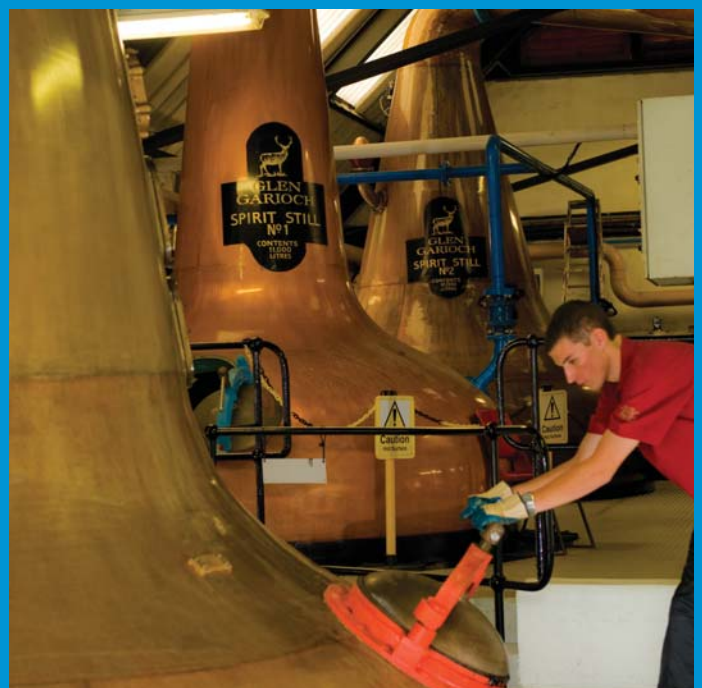


ABERDEEN CITY AND SHIRE

Export Survey 2008



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Summary of Findings

533 companies in Aberdeen City and Shire supplied information: 375 exporters and 158 non-exporters. The main findings are as follows:

Current Exporters

- There are 15 countries to which 100 or more Aberdeen City and Shire companies currently export, this has decreased from 20 countries in the previous survey, a decline most likely due to the drop in respondents
- Norway, USA, Netherlands and Australia are the principal export markets
- Australia has risen to 4th in the current rankings from 8th in 2006. Angola has also strengthened its position as a significant export market coming in at number 7 on the current list compared with 13th in the 2006 Export Survey.
- The USA is the most important market for 61 companies
- The main export markets for Aberdeenshire-based companies are in Western Europe and North America, while Aberdeen-based companies have a much wider geographical spread linked to oil and gas regions
- 213 exporters indicated an intention to develop new markets
- China, the USA and Libya are the top markets targeted for future export development
- In addition to the above, other countries ranked highly for future export development, include Brazil, Malaysia, Australia, Qatar and Saudi Arabia
- 73% of current exporters have been exporting for 6 years or longer
- 170 exporters stated that exports comprised over 30% of their total turnover
- 84% of exporters expect the value of their international activity to grow in the next two years
- 73% of exporters use direct sales as a method of doing business internationally
- 'Exchange rates' and 'Competitive prices' were the main problems experienced by current exporters

Non-Exporters

- Denmark, the USA, France and Sweden, and a number of other European countries are the principal target markets for companies intending to begin exporting
- The main reason that companies do not export is that it is 'not part of their business plan' or they have 'unsuitable products/services'

All Respondents

- Overseas Missions, Published Market Information and Financial Assistance were the 3 most popular forms of assistance requested from Scottish Enterprise and local trade development agencies by respondents to the 2008 Export Survey

Companies in both the 2006 and 2008 Export Survey

- 241 companies responded to both the 2006 and 2008 Export Surveys, including 161 exporters
- 9 companies have successfully begun exporting to new markets they had identified in the 2006 survey
- Between the 2006 and 2008 surveys 54 companies increased the value of their exports whilst 15 reported a drop in value

Background

Aberdeen City Council and Aberdeenshire Council have recently updated the Export Survey Report and the 2008 version indicates the continued high levels of international activity undertaken by companies in the Aberdeen City and Shire area.

This survey is carried out every two years and is the most comprehensive of its kind in Scotland.

Without the businesses participating in the survey the data would not be available. Their input is invaluable, and the information helps shape services to be offered by the various agencies thus ensuring the needs of the local business community are met in the future.

Globalisation is important in the future development of the Aberdeen City and Shire economy and we will work with local businesses to deliver the best programme of support for international trade.

Belinda Miller

Head of Service
Economic & Environmental Sustainability
Aberdeen City Council

James Knowles

Head of Economic Development
Aberdeenshire Council

Support for International Trade within Aberdeen City and Shire

Information formerly held on Business Gateway International's website can now be found on Aberdeen City and Shire's website which provides a convenient single entry point to an extensive network of international support services.

For further information check out Aberdeen City and Shire website's International page:

<http://www.exportlink.co.uk>

Contact Scottish Development International via www.sdi.co.uk or Aberdeen City Council on 01224 814605 or Aberdeenshire Council on 01224 664727.

Introduction

The 2008 survey of Aberdeen City and Shire companies was carried out to gather information about current exporting activities and future exporting intentions, and to provide an update of the previous surveys, particularly the 2006 survey. To allow for comparisons over time, the range of companies contacted and the questions asked were broadly similar to the earlier surveys.

The purpose of this report is to provide an analysis of the main findings of the survey. This will help Scottish Enterprise and local economic development organisations to reassess their export development priorities and, where appropriate, modify the type of service they offer to local companies.

Survey Method and Response

Questionnaires were sent to 1,798 companies in Aberdeen City and Shire, up from around 1,750 last time. Following one postal and one email reminder letter, a total of 533 valid responses were returned for analysis.

COMPANIES WERE ASKED THE FOLLOWING QUESTIONS:-

General

- Company name, address, postcode
- Contact name, job title, telephone, fax, e-mail, website
- Description of business activities
- Sectors of operation, (detailing the subsector if Oil & Gas), number of employees based in Aberdeen City & Shire

Shire

- Does the company currently do business in international markets?

Current Exporters

- For how many years has the company been doing business in international markets?
- Is the company's international activity managed from its base in Aberdeen City and Shire?
- In which countries are companies currently active?
- Which three countries are the company's most important markets in terms of turnover?
- How does the company do business in these markets?
- Does the company have registered offices in other countries?
- Which additional markets does the company plan to target for future business development?
- What is the value of current international business per annum and what percentage is this of the company's annual turnover?
- How has the value of international activity changed over the past two years and how is it expected to change over the coming two years?
- What are the main problem areas when doing international business?

Non-Exporters

- What are the main reasons for not being active in international markets?
- If the company intends to begin doing business internationally which countries will be targeted?

All

- Which forms of assistance available through Business Gateway International would be of interest to the company?
- Would respondents be interested in meeting with an International Trade Advisor to discuss their company's internationalisation activities?

The Database

Figure 1 provides a summary of the responses to the 2008, 2006 and 2004 Export Surveys. In 2008, 533 survey responses were entered into the database. Of that total, 375 companies (70% of respondents) are currently doing business in international markets and over half of these are intending to export to additional countries (57%). The remaining 158 companies are not currently doing business in an international market, although 19 of them are intending to begin exporting in the future.

Figure 1 – Survey Response

	2008 Survey	2006 Survey	2004 Survey
Companies in database	533	650	616
Companies currently exporting	375	495	425
Companies intending to export to additional countries (included above)	213	240	241
Companies not exporting but intending to	19	20	26
Companies not exporting and not intending to meantime	139	135	165

The number of companies responding to the 2008 survey overall has fallen giving a corresponding decrease in the number of current exporters, from 495 in 2006 to 375 in 2008. The percentage of respondents currently exporting has decreased from 76% in 2006 to 70% in 2008.

There was an increase in the number of exporters intending to expand their international business activity,

from 48% of all exporters in 2006 to 57% in 2008. The number of non-exporters intending to begin exporting has decreased from 20 (13% of all non-exporters) in 2006 to 19 (12%) in 2008.

Respondents were asked to select the industrial sectors in which they operate and also indicate the most important industrial sector to their business. The list of sectors was as follows:

- Agriculture
- Chemicals
- Creative Industries
- Decommissioning
- Environment
- Food, Fish & Drink
- ICT/Software
- Oil & Gas
- Recruitment/Manpower
- Tourism
- Other
- Biotechnology/Life Sciences
- Construction
- Defence
- Engineering
- Financial/Legal
- Freight/Transport
- Medical/Health Care
- Professional Services
- Renewable Energies
- Training/Education

A breakdown of the sectors in which respondents operate is shown in Figure 2 along with the most important industrial sector. The total number of sectors in which companies operate is significantly higher than the number of respondents as some companies operate in more than one sector.



Figure 2 – Respondents by Sector and Exporting Status

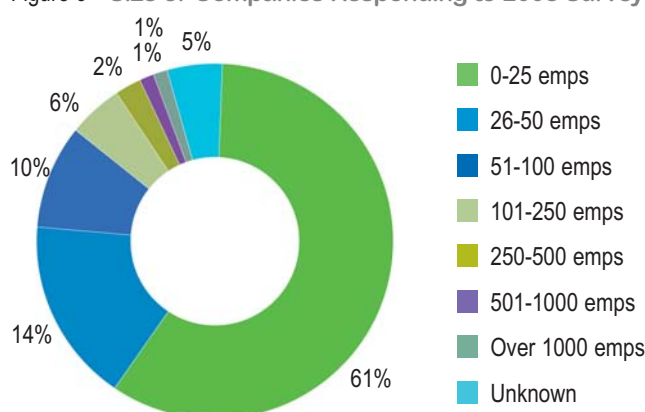
Sector	Number of companies operating in sector*	Most important sector		Total
		Exporters	Non-Exporters	
Agriculture	40	5		5
Biotechnology / Life Sciences	18	2		2
Chemicals / Refining	62			0
Construction	101	4	22	26
Creative Industries	27	3	4	7
Decommissioning	54			0
Defence	44	1		1
Engineering	164	11	19	30
Environment	59		4	4
Financial/Legal	18	1	1	2
Food, Fish and Drink	85	28	21	49
Freight/ Transport	54	9	2	11
ICT and Software	34	5	4	9
Medical/ Healthcare	35	2	4	6
Oil & Gas	358	259	44	303
Professional Services	61	8	8	16
Recruitment/Manpower	36	3	4	7
Renewable Energies	63	1	4	5
Tourism	27	5	4	9
Training/Education	64	11	2	13
Other	47	14	11	25
No Response	10	3		3
Total	1461	375	158	533

* Respondents were able to choose more than one industrial sector

Out of the 358 respondents who indicated that the Oil & Gas sector was one of the industrial sectors in which they operate, 303 (85%) identified this sector as the most important. Of the 85 companies whose operations include the Food, Fish & Drink sector, 49 (58%) identify this sector as the most important. The Engineering Industry involved 164 respondents of which 30 (18%) identified this sector as the most important to their business. 26% of all respondents involved in Construction (26 out of 101) ranked this sector as most important to their business.

Respondents were also asked to indicate the number of people they employed. Nearly two-thirds (61%) had 25 or fewer employees, 14% had between 26 and 50, 10% had between 51 and 100, 6% had between 101 and 250, 4% had more than 250 employees and the number of employees was not known for the remaining 5% – see Figure 3. This was very similar to the size distribution of companies in the previous export survey.

Figure 3 - Size of Companies Responding to 2008 Survey



THE REMAINDER OF THIS REPORT PROVIDES THE MAIN RESULTS OF THE 2008 EXPORT SURVEY.

It is divided into 5 parts:

- Current Exporters
- Non-Exporters
- All Respondents
- Analysis by Council Area
- Experience of companies that responded to both the 2006 and 2008 surveys

Current Exporters

Destination of Exports

Respondents to the survey indicated a wide range of countries to which they currently export. Figure 4 lists those countries that were identified by at least 40 respondents.

Figure 4 - Countries in which Companies are Currently Active

Country	Oil & Gas	Engineering	Food, Fish & Drink	Construction	Total	2008 Rank	2006 Rank	2004 Rank
Norway	187	70	23	28	206	1	1	2
USA	149	59	21	28	188	2	2	1
Netherlands	135	50	26	24	163	3	3	3
Australia	118	40	12	18	135	4	8	10
UAE	119	40	10	17	131	5	6	5
France	93	40	37	19	129	6	4	4
Angola	116	40	9	19	121	7	13	23
Singapore	104	29	14	19	117	8	17	16
Italy	93	37	24	17	116	9	12	11
Denmark	94	30	20	10	114	10	9	9
Nigeria	103	39	10	20	111	11	5	7
Egypt	102	33	11	17	107	12	16	11
Kazakhstan	103	33	8	18	106	13	14	14
Canada	86	33	15	14	105	14	7	6
Germany	74	28	25	12	105	14	11	13
Azerbaijan	92	34	8	18	98	16	10	7
Brazil	93	30	8	16	97	17	20	19
India	89	32	9	15	96	18	21	22
Malaysia	83	30	11	14	91	19	18	17
Russia	84	28	13	16	90	20	19	15
Ireland	65	30	21	16	89	21	21	19
Qatar	81	32	10	18	89	21	14	18
Algeria	75	31	8	14	76	23	24	21
Libya	74	27	6	12	76	23	26	26
Saudi Arabia	66	25	9	10	74	25	27	28
China	65	25	13	13	73	26	25	25
Indonesia	67	23	4	7	70	27	29	26
Spain	46	21	18	8	68	28	23	24
South Africa	52	24	11	11	60	29	28	29
Oman	53	20	6	7	56	30	33	47
Belgium	27	16	22	6	53	31	30	30
Equatorial Guinea	49	18	4	9	51	32	31	31
Gabon	48	19	5	11	50	33	36	33
Sweden	34	14	12	10	48	34	32	34
Mexico	45	19	4	6	46	34	35	36
Thailand	44	19	4	9	45	36	34	36
Japan	27	8	15	4	44	37	38	39
Venezuela	42	17	6	7	44	38	37	35

(N.B. Numbers do not add up across rows as not all sectors have been included and companies may have indicated that they operate in more than one sector).

Norway remains ahead of the USA as the most frequently mentioned export market. 206 exporters, or slightly over half of all exporters in the 2008 survey, identified Norway as one of their current markets, compared with 257 in the 2006 survey. The USA remains the 2nd most popular country, with 188 companies currently exporting there. The Netherlands has remained in 3rd place with 163 exporters.

The top 10 export markets in 2008 do differ from the corresponding top 10 in the 2006 survey. Australia has moved up from 8th to 4th. Angola, which was ranked 23rd in the 2004 survey rose to 13th in 2006 and has now reached 7th in the latest 2008 rankings. Nigeria has dropped from the 5th most frequently mentioned export market in 2006 to 11th in 2008, and Canada dropped from 7th in 2006 to the 14th most frequently mentioned export market in the 2008 survey.

The high ranking of these 10 countries is mainly due to the large number of oil-related companies that export to them. However, France in 6th place, is an export market for companies in a wider spread of industrial sectors, including Food, Fish & Drink.

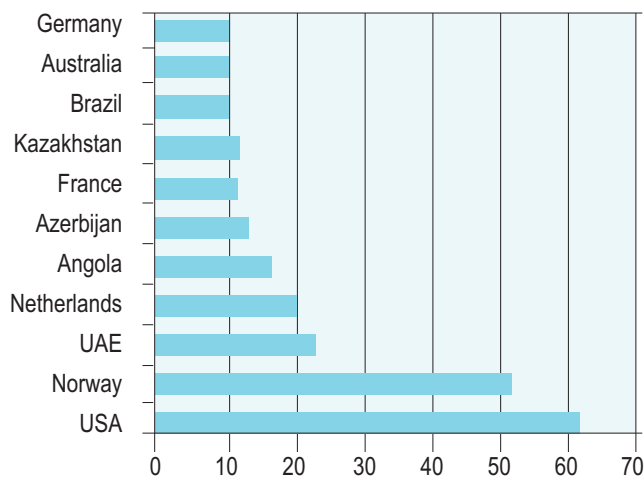


See Appendix 1 for a more detailed list of current export markets and industrial sectors.

Most Important Country in which Companies are Active

Respondents were asked to identify the three countries that are their most important markets in terms of turnover. Figure 5 shows that 61 companies identified USA as their most important export market, ten more than the total for Norway which is the most important country for 51 companies. These results are closer than in 2006, when USA (92) was the most important country for exporters, with Norway (55) significantly behind in 2nd place. Out of the top 10 most important countries identified in 2008, Angola was the fastest climber entering at number 5, mirroring its climb in export markets shown above. Brazil was also up from 18th in 2006 to 7th equal in 2008. Nigeria and Ireland dropped out of the top 10.

Figure 5 - Most Important Export Market



In total, USA was identified as either the 1st, 2nd or 3rd most important export market by 113 companies. Norway was the 1st, 2nd or 3rd most important market for 104 companies.

How Companies do Business in International Markets

Respondents were asked how they did business in their overseas markets. They were presented with 12 possible methods plus an option to specify an 'Other' method. The results are shown in Figure 6.

Figure 6 - Method of Doing Business in International Markets

Method	No. of Times Identified	% Current Exporters	% in 2006
Direct sales	273	73	72
Agent	123	33	32
In-country subsidiary office	74	20	12
Via UK-based buyers	60	16	14
In-country branch office	52	14	14
Joint venture	47	13	14
Representative	44	12	10
Internet sales	43	11	10
Distributor	39	10	10
In-country liaison/rep office	17	5	6
Other	16	4	5
Licence	8	2	1
Franchise	3	1	0

The most common method of doing international business was 'Direct sales', which was mentioned by 273 companies (73% of exporters in the 2008 survey). Using an 'Agent' was the 2nd most common method, being mentioned by 123 exporters. These two methods of doing business were also the most common methods in the 2006 survey.

Of the 375 current exporters in the survey, 108 (29%) stated that they had overseas offices. The USA was identified most frequently with 67 companies having an overseas office there. The UAE was second with 26 offices, while Australia had 21. Of the companies that specified a city, Houston in the USA was the most popular with 34 companies having offices there. Singapore was second with 19 offices whilst Dubai in the UAE was third with 13 offices – see Figure 7.

Figure 7 - Registered Offices in Overseas Countries and Cities

Country	No. of times identified	Country	No. of times identified
USA	67	Singapore	19
● Houston	34	Netherlands	17
UAE	26	Canada	13
● Dubai	13	● Calgary	1
Australia	21	Brazil	13
● Perth	9	● Rio de Janeiro	5
Norway	20	Azerbaijan	12
● Stavanger	5	● Baku	6

Problems Experienced by Current Exporters

Survey respondents were asked to indicate problems they had encountered in exporting. Figure 8 contains an analysis of the responses and compares the 2008 survey findings with the previous survey. For the 2008 survey, one new option was added - Security and/or Political Risk which appeared at number 7 on the list of findings.

THE 3 MAIN PROBLEMS IDENTIFIED BY 153, 126 AND 99 RESPONDENTS RESPECTIVELY WERE:

- Exchange rate
- Competitive prices
- Finding overseas business partners

Exchange rate concerns replaced competitive prices (1st in 2006) at the top of the list.

Finding overseas business partners replaced cost of market entry (3rd in the 2006 survey).

Figure 8 - Main Problems Experienced by Current Exporters

Problem	No. of times identified	% of Current Exporters 2008	% of Current Exporters 2006
Exchange rate	153	41	25
Competitive prices	126	34	32
Finding overseas business partners	99	26	13
Identifying business opportunities	82	22	20
Cost of market entry	78	21	23
Lack of staff/skills	70	19	18
Security and/or political risk	61	16	N/A
Legal complexities/bureaucracy	59	16	18
Sourcing market information	57	15	17
Finding overseas distributors/agents	55	15	17
Foreign taxation	56	15	13
Branding/market penetration	52	14	14
Import duties	47	13	10
Language difficulties	44	12	12
Lack of working capital	42	11	17
Transportation & infrastructure difficulties	40	11	8
Export documentation	37	10	11
Cost of Product Development	32	9	14
Other	34	9	11
Corruption	31	8	11
Cultural issues	26	7	8
UK not within Euro Zone	18	5	3
Total Exporters	375	-	-

'Exchange rate' was the main problem for exporters rising from 25% in 2006 to 41% in 2008 reflecting the difficulties of a strong pound for exporters. 'Competitive prices' remain a main problem for exporters in the 2008 survey. The rise of 'Finding overseas business partners' is explained by the removal of the 'Finding overseas clients' category for 2008. This resulted in a transfer of votes to 'partners'.

Value of International Business

Respondents were asked about four aspects of their international business activities:

- Approximate annual value of current international business (Figure 9)
- Approximate annual value of current international business as a percentage of turnover (Figure 10)
- Change in international activity over the past 2 years (Figure 11)
- Anticipated change in international activity over the next 2 years (Figure 12)

Figure 9 - Value of International Business by Main Industrial Sector

Value	Oil & Gas	Food & Drink	Engineering	Training/ Education	Professional Services	Freight Transport	All Sectors 2008	All Sectors 2006
Up to £250,000	60	8	5	5	5	2	114	172
£250,001-500,000	15	2	0	1	0	0	22	68
£500,001-1,000,000	29	2	1	0	0	0	35	50
£1,000,001-2,000,000	32	5	4	2	0	0	49	51
£2,000,001-5,000,000	46	3	0	1	1	4	58	51
£5,000,001-10,000,000	19	4	1	0	0	1	25	33
£10,000,001- £20m	15	1	0	0	0	1	18	13
£20m+	26	1	0	0	1	0	28	27
Unknown	17	2	0	2	1	1	26	30
Total	259	28	11	11	8	9	375	495

(N.B. Numbers do not add up across rows as not all sectors have been included and companies may have indicated that they operate in more than one sector).

It is difficult to put a total value on exports from Aberdeen City and Shire for two main reasons. Firstly, not all exporters responded to the survey, and secondly, it is difficult to estimate the contribution of companies whose exports are handled through a head office or branch located elsewhere in the UK. However, on the basis of information gathered in the 2008 survey, the value of exports of Aberdeen City and Shire companies

that responded is estimated to be in the region of £1.34 billion. This is a significant increase of 34% when we factor in the drop in returns since 2006.

Moreover, the number of companies that valued their international activity at over £10,000,000 increased from 40 in 2006 to 46 in 2008 despite over 100 fewer respondents.

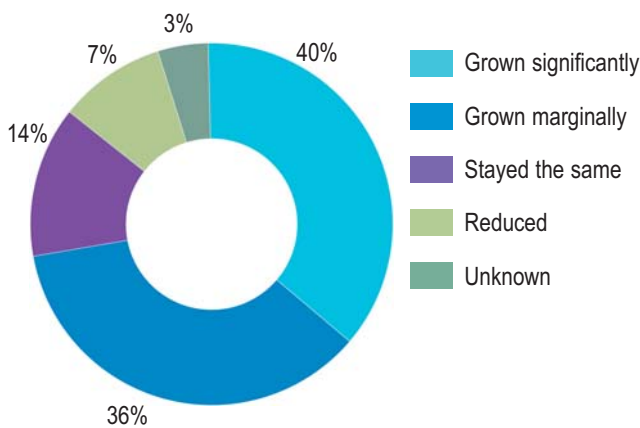
Figure 10 - International Business Activity as a Percentage of Annual Turnover

% of Turnover	No. of Companies	% of Exporters
0-5%	88	23
6-15%	51	14
16-30%	66	18
31-50%	57	15
51-100%	113	30
Total Exporters	375	100

For 139 companies, exporting accounts for no more than 15% of their annual turnover. The remaining 236 companies can be classified as active exporters, which means that over 15% of their turnover is accounted for by exports. 170 companies indicated that the value of exports represents over 30% of their turnover.

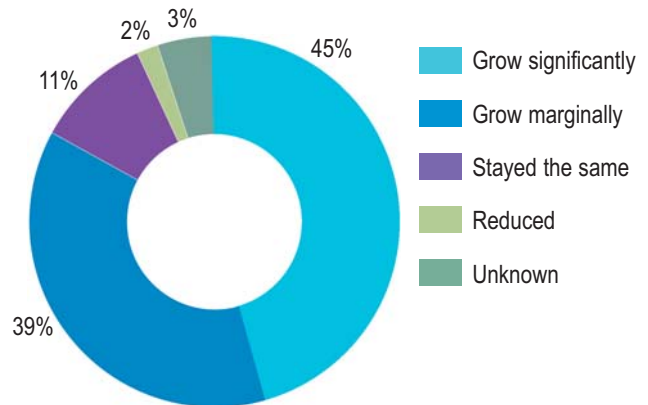
Respondents who are currently exporting were asked how their international activity had changed over the past two years. 40% stated that it had grown significantly, and a further 36% stated that it had grown marginally. Only 7% of exporters indicated that their international activity had reduced over the 2 years.

Figure 11 - Change in International Activity over past 2 years



Exporters were also asked to anticipate how the value of their company's international activity as a percentage of annual turnover would change over the coming two years. Of the 375 current exporters in the survey, 167 (45%) expect the value of their international business activity to grow significantly. A further 148 companies (39%) believe it will grow marginally with only 13% expecting the value of exports to stay the same or reduce over the coming two years – see Figure 12.

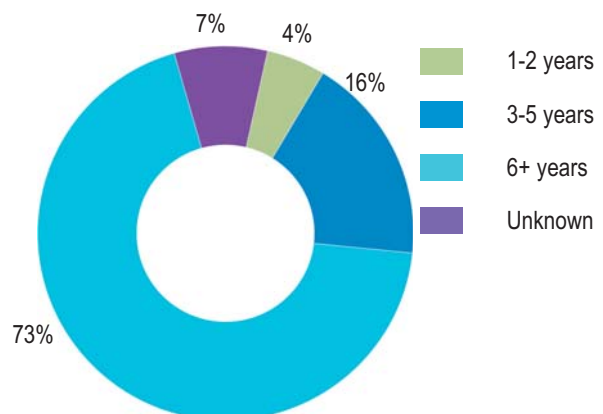
Figure 12 - Anticipated Value of International Activity



International Business Experience

Current exporters were asked to indicate the length of time they have been exporting. The results are shown in Figure 13.

Figure 13 - Length of Time Exporting



276 companies in the survey have been exporting for six years or more. This accounts for 73% of current exporters. The percentage of companies that have been exporting between 3 and 5 years is 16%, whilst the percentage of new exporters (i.e. with up to two years experience) was 4%. The remaining 7% didn't know when exporting started.

330 respondents, 88% of all current exporters, stated that their company's international activity is managed from a base in Aberdeen City and Shire. Of the 45 companies whose international activity is managed from a location outside this area, 14 referred to a base in England, 7 manage their international activity from USA

and 4 manage it from other areas of Scotland. The remainder mentioned other locations or gave an imprecise response, e.g. 'various' or 'worldwide'. 9 exporters did not respond to this question.

New Markets for Current Exporters

213 current exporters indicated an intention to develop markets in new countries. Figure 14 ranks the countries that were mentioned at least 14 times. It can be seen that China, USA, Libya and Brazil are the most popular

new markets for exporters in the 2008 survey. The USA has entered the top 10 ranking target markets for the first time and, in fact, now occupies second place. China, Libya and Brazil were all top ten entries in 2006.

In the 2 years since the 2006 survey, Malaysia, India and Thailand have emerged as popular new markets, with Middle and Far East countries replacing many of the West African nations which featured in 2006. Russia, Angola and UAE are less popular as potential new destinations than they were in the previous survey.

Figure 14 - New Markets for Current Exporters

Country	Oil & Gas	Engineering	Food, Fish & Drink	Defence	Renewables	Total	2008 Rank	2006 Rank	2004 Rank
China	25	7	7	3	3	32	1	5	11
USA	24	5	4	4	5	27	2	14	27
Libya	25	9			6	26	3	4	1
Brazil	22	4	3	1	2	25	4	8	8
Malaysia	22	9	1	2	4	25	4	24	20
Australia	20	5	2	2	5	24	6	6	
Qatar	23	9		1	5	24	6	18	16
Saudi Arabia	23	11		2	7	24	6	6	7
India	22	4	1	2	6	23	9	28	
Kazakhstan	22	5	1		2	23	9	10	2
UAE	21	8		1	4	22	11	3	2
Angola	21	6	2	5	6	21	12	2	9
Canada	14	4		2	1	19	13	14	
Oman	19	7		1	4	19	13	14	9
Russia	15	7	4	4	4	19	13	1	2
Thailand	17	5	1	1	2	19	13	30	30
Indonesia	15	4	1	1	2	17	17	38	27
Singapore	13	6	1	1	3	16	18	29	39
France	9	5	5	4	2	15	19		
Algeria	14	3			1	14	20	24	30
Kuwait	14	7		1	3	14	20	24	14
Mexico	13	1	1		1	14	20	24	27
Nigeria	14	4				14	20	14	11

(N.B. Numbers do not add up across rows as not all sectors have been included and companies may have indicated that they operate in more than one sector).

See Appendix 2 for a more detailed list of new markets for current exporters by industrial sector.

Non-Exporters

Reasons Why Companies are not Active in International Markets

The main reasons given by 150 companies for not exporting are shown in Figure 15. 'Not part of business plan' was the key reason, being mentioned by 45% of all non-exporting respondents in 2008. 'Unsuitable products/services' was the second most common

reason, mentioned by 20% of non-exporters. These two reasons for not exporting were also the most frequently mentioned in the 2006 Export Survey. 'Restricted production capacity' (15%) and 'Difficulty identifying export opportunities' (10%) were also significant barriers for non-exporting respondents.

Figure 15 - Main Reasons Why Companies are not Active in International Markets

Reasons	No. of times identified	% of non-exporters in 2008	% in 2006	% in 2004
Not part of business plan	67	46	39	36
Unsuitable products/services	29	20	28	30
Restricted production capacity	22	15	8	-
Difficulty identifying export opportunities	14	10	10	13
Cost of market entry	14	10	-	-
Limited knowledge of exporting	11	7	9	12
Lack of trained staff	11	7	-	-
Difficulty sourcing market information	10	7	5	8
Fear of payment problems	9	6	5	5



43 respondents gave "Other reasons" for not exporting. These included companies whose exporting activities are handled by a head office outside Aberdeen City and Shire, companies that are concentrating on the UK market, and new companies that have not yet given much thought to exporting.

Intended Markets for Non-Exporters

Companies not exporting but planning to begin, were asked to indicate the countries they expected to target. Figure 16 lists those countries that were cited as potential export markets by at least five different companies. USA was the most frequently mentioned market that current non-exporters intend to develop. The other key intended markets are all in Europe, with the exception of Australia.

Figure 16 - Intended Markets for Non-Exporters

Country	Total	Rank 2008	Rank 2006	Rank 2004
Denmark	7	1	3	18
USA	7	1	1	2
France	6	3	3	4
Sweden	6	3	15	18
Austria	5	5	15	18
Belgium	5	5	7	18
Finland	5	5	15	18
Germany	5	5	3	4
Greece	5	5	15	18
Ireland	5	5	15	18
Italy	5	5	7	18
Luxembourg	5	5	15	18
Netherlands	5	5	7	3
Portugal	5	5	15	6
Spain	5	5	7	6

See Appendix 3 for a full breakdown of intended markets by industrial sector.

Exporters and Non-Exporters

Assistance Required

Exporters and non-exporters were asked what type of assistance if any, would help them to do business successfully in international markets. The options were:

- Help to prepare for doing international business
- Published market information
- Company specific market research
- Seminars/trade clinics
- Overseas missions/learning journeys/exhibitions
- Inward trade missions
- Financial assistance
- Product development assistance
- Export documentation assistance
- Assistance to establish a market presence
- Export related training
- Local export networking opportunities
- Bringing in skills from overseas markets
- International strategy development
- None
- Other

The most popular forms of assistance required by respondents were 'Overseas missions/learning journeys/exhibitions' (which was mentioned by 30% of all respondents) and 'Published market information' mentioned by 24%, – see Figure 17.

'Financial assistance' fell from 1st to 3rd. Only 15% of respondents indicated they required no assistance well down from 33% of respondents in 2006.

Figure 17 - Forms of Assistance Required by all Respondents

Assistance	No. of times identified	% of Responses	
		2008	2006
Overseas missions/learning journeys/exhibitions	158	30	33
Published market information	129	24	25
Financial assistance	119	22	33
Company-specific market research	108	20	21
Assistance to establish a market presence	100	19	22
None	79	15	33
Seminars/ trade clinics	76	14	15
Inward trade missions	71	13	14
Local export networking opportunities	69	13	18
Product development assistance	67	13	19
Export documentation assistance	57	11	11
International strategy development	57	11	-
Help to prepare for doing international business	50	9	11
Export related training	48	9	8
Bringing in skills from overseas markets	24	4	-
Other	2	0	2

Area Analysis

General Figures

To allow an area analysis of the survey results, each response was allocated a Council code – i.e. Aberdeen or Aberdeenshire - to indicate where the company is located. A summary is shown in Figure 18.

Figure 18 - Summary Results by Council Area

	Aberdeen	Aberdeenshire
Companies in database	354	179
Companies currently exporting	257	118
Companies currently exporting, intending to increase markets (included in above)	151	62
Companies not exporting, but intending to	12	7
Companies not exporting and not intending to meantime	84	54

Destination of Exports

The most popular export markets for companies in each of the two Council areas are shown in Figure 19. Oil-related export markets feature prominently in the Aberdeen list, whereas the main European export markets dominate the Aberdeenshire list.

Figure 19 - Current Countries of International Business Activity

Aberdeen		Aberdeenshire	
Norway	151	USA	56
USA	132	Norway	55
Netherlands	115	France	49
Angola	102	Netherlands	48
Australia	96	Italy	44
Nigeria	95	Germany	42
UAE	95	Australia	39
Kazakhstan	88	UAE	36
Singapore	83	Singapore	34
Denmark	81	Denmark	33
		Ireland	33



Most Important Markets

The most important countries for current exporters in Aberdeen and Aberdeenshire are shown in Figure 20. In Aberdeen, the two most important markets are USA and Norway, which was also the case in the past three export surveys. USA and Norway are also the most important markets in Aberdeenshire in 2006.

Figure 20 - Most Important Markets 2008

Aberdeen		Aberdeenshire	
USA	45	USA	16
Norway	39	Norway	12
UAE	16	Netherlands	7
Angola	14	France	6
Netherlands	13	UAE	6
Azerbaijan	12	Germany	6
Kazakhstan	8	Australia	5
Brazil	8	Ireland	5
Nigeria	8		

New Markets for Current Exporters

Figure 21 lists the additional countries to which respondents are planning to export. The top future markets for Aberdeen exporters are China, Australia, Libya and Qatar – none of which appeared in the top three in the 2006 survey. The most important new markets for Aberdeenshire companies are China, USA, Australia and Canada. Australia and the USA also appeared in the 2006 top four. There are no European countries on the list of new markets for Aberdeen companies; France and Russia appear on the list for Aberdeenshire.

Figure 21 - New Markets for Current Exporters

Aberdeen		Aberdeenshire	
China	22	China	10
Australia	21	USA	8
Libya	21	Australia	7
Qatar	21	Canada	7
Malaysia	20	France	7
Kazakhstan	19	Russia	7
Saudi Arabia	19	Angola	6
UAE	19	New Zealand	6

Main Problems Experienced by Current Exporters

The area breakdown of problems experienced by current exporters is shown in Figure 22. The most frequently mentioned problems for exporters in Aberdeen were 'Exchange Rate' and 'Competitive prices'. For Aberdeenshire, the problems mentioned were the same.

Figure 22 - Main Problems Experienced by Current Exporters

Aberdeen		Aberdeenshire	
Exchange rate	100	Exchange rate	53
Competitive prices	81	Competitive prices	45
Finding Credible Business Partners	75	Identifying business opportunities	25
Identifying business opportunities	57	Finding Credible Business Partners	24
Cost of market entry	54	Cost of market entry	24
Lack of staff/skills	55	Finding overseas Distributors/Agents	19
		Difficulty sourcing market information	19

How Companies do Business in International Markets

As can be seen from Figure 23, 'Direct sales' and 'Agent' were the most common methods of doing business for exporters in both Aberdeen and Aberdeenshire. 'In-country subsidiary office' was the third most common in Aberdeen, whilst 'Via UK-based sales' was third most common with companies in Aberdeenshire.

Figure 23 - How Companies do Business in International Markets

Aberdeen		Aberdeenshire	
Direct sales	182	Direct sales	91
Agent	87	Agent	36
In-country subsidiary office	59	Via UK-based buyers	19
In-country branch office	43	Distributor	18
Via UK-based buyers	41	Internet sales	18
Joint venture	39	In-country subsidiary office	15
Representative	29	Representative	15
Internet sales	25	In-country branch office	9
Distributor	21	Joint venture	8
In-country liaison/rep office	14	In-country liaison/rep office	3
Licence	5	Licence	3
Franchise	2	Franchise	1

Main Reasons Why Companies Do Not Export

Companies that do not export were asked to indicate their reasons for not doing so. The breakdown of responses is shown in Figure 24. In Aberdeen, the main reason given by companies for not exporting was that international activity was 'Not part of business plan', with the second reason being 'Unsuitable products/services'. These were also the two main reasons given by non-exporters based in Aberdeenshire.

Figure 24 - Main Reasons Why Companies Do Not Export

Aberdeen		Aberdeenshire	
Not part of business plan	45	Not part of Business Plan	22
Unsuitable products/services	18	Unsuitable products/services	12
Restricted production capacity	12	Restricted production capacity	10
Difficulty identifying export opportunities	8	Cost of Market Entry	7
Cost of Market Entry	7	Difficulty identifying export opportunities	6

Non-Exporters Intending to do Business Internationally

Companies that are currently non-exporters but are planning to begin exporting were asked to indicate the countries they are targeting; the results are shown in Figure 25. The most commonly mentioned intended markets for both Council areas were the USA and Denmark. In the previous survey, the USA was identified as the main intended market for non-exporters for companies based in both Aberdeen and Aberdeenshire.

Figure 25 - Intended Markets for Non-Exporters

Aberdeen		Aberdeenshire	
USA	4	USA	3
Denmark	4	Denmark	3
		Sweden	3
		France	3

Companies in both 2006 and 2008 Surveys

A link was established between the 2006 and 2008 export survey databases in order to identify the companies that had responded to both surveys. It was hoped that this would yield important information about companies that had for example, identified new markets in 2006 and their actual experience of developing these markets by 2008.

A precise matching of company names identified a total of 241 companies that responded to both surveys. 161 companies were exporters in both surveys and 50 were non-exporters in both surveys. 9 companies who were non-exporters in 2006 had become exporters in 2008, while 15 companies who were exporters in 2006 had ceased exporting in 2008. Of the 241 companies that responded to both surveys, 149 are based in Aberdeen and 92 in Aberdeenshire.

Exporters in both Surveys

139 companies that were exporters in 2008 had, in the 2006 survey, indicated new markets to which they planned to begin exporting. Of that total, 57 companies have successfully begun to export to at least one of

their intended new markets. Figure 26 shows the most frequently mentioned countries that were target markets in 2006 and actual export markets in 2008.

Figure 26 - Future Markets in 2006 and Actual Markets in 2008

Market	Number of Companies
Russia	9
Angola	7
China	6
UAE	6
Qatar	5
Saudi Arabia	5
Kazakhstan	4
Malaysia	4
Mexico	4
Nigeria	4
Oman	4
Venezuela	4
USA	4

Of the exporters in the 2006 survey that had identified Russia as a potential new market, 9 were exporting to that country by the time of the 2008 survey. Angola had been developed as export markets by 7 companies that had indicated an intention to begin exporting to this country in the 2006 survey.

Non-Exporters in 2006 and Exporters in 2008

Out of the 9 companies that were not exporting at the time of the 2006 survey and had become exporters by 2008, 4 had identified specific markets they intended to target. Three of these companies were successful in developing at least one of these markets. The countries to which non-exporters in 2006 had begun exporting to by 2008 were Australia, France, India and the USA.



Value of Exports

Of the 132 companies that answered the value of exports question in both the 2006 and 2008 surveys, 54 have increased the value of their exports, 63 have seen no change and 15 have experienced a drop in value. Of the 10 companies that had an export value of over £10 million in 2006, 9 had kept the value of their exports above £10 million in 2008. 1 company reported that their exports had dropped below £10 million. The export value of one of the 9 firms over £10 million had increased to more than £20 million in 2008.

Most Important Markets

Of the 161 exporters that responded to the 2006 and 2008 surveys, 140 indicated their most important export market in both surveys. 74 (53%) of these 140 companies have the same top market in the 2008 survey as they had in 2006. Figure 27 lists the most frequently mentioned export markets that have remained unchanged.

Figure 27 - Most Important Markets in 2006 and 2008 Surveys

Market	Number of Companies
USA	19
Norway	15
Netherlands	4
Angola	3
Azerbaijan	3
Belgium	3
Brazil	3

USA and Norway remain the most important export markets for current exporters. The actual number of companies with USA as their most important market has decreased from 40 in 2006 to 31 in the 2008 survey. Norway has increased from 25 in 2006 to 27 companies in the 2008 survey.

Main Problems Experienced by Exporters

The list of companies that responded to both the 2006 and 2008 surveys was analysed to determine how the main problems experienced in exporting had changed between 2006 and 2008. The results of the analysis are shown in Figure 28.

Figure 28 - Main Problems Experienced by Exporters in 2006 and 2008

Main Problems	Problem in Both Surveys	No Problem in Either Survey	Was in 2006 but not in 2008	Not in 2006 but was in 2008
Exchange Rates	32	77	14	36
Competitive Prices	28	83	21	27
Cost of Market Entry	21	102	16	20
Lack of Working Capital	15	120	13	11
Foreign Taxation	12	120	10	17
Finding Overseas Distributors/Agents	12	116	14	17

Of the companies who stated 'Exchange rate' as a problem in 2006, 32 of these exporters were still finding it a problem in 2008. 28 companies were still having a problem with 'Competitive prices' and 21 continued to experience a problem with the 'Cost of Market Entry'.

Reasons for Not Exporting

Of the 50 companies who were non-exporters in the 2006 and 2008 surveys, 26 stated that the reason they were not active in international markets was because it was 'Not part of the business plan'. 19 companies mentioned 'Unsuitable products/services' as a main reason for not exporting.

Appendix 1 - Current Markets for Exporters

	Agriculture	Biotechnology/Life Science	Chemicals	Construction	Creative Industries	Decommissioning	Defence	Environment	Engineering	Financial/Legal	Food, Fish and Drink	Freight/Transport	ICT/Software	Medical/Healthcare	Oil and Gas	Professional Services	Recruitment/Manpower	Renewable Energies	Tourism	Training/Education	Other	Total	Rank in 2008	Rank in 2006	Rank in 2004	Rank in 2002
Norway	10	7	24	28	6	28	26	35	70	8	23	27	15	14	187	22	11	31	9	21	18	206	1	1	2	1
USA	10	9	30	28	9	30	28	31	59	8	21	20	15	14	149	21	14	35	7	25	21	188	2	2	1	2
Netherlands	9	7	26	24	7	22	22	30	50	7	26	25	7	14	135	15	11	28	9	18	17	163	3	3	3	3
Australia	5	6	17	18	2	22	19	19	40	4	12	17	10	8	118	12	12	25	5	11	11	135	4	8	10	12
UAE	5	5	22	17	3	20	16	20	40	3	10	18	10	7	119	14	11	26	4	15	6	131	5	6	5	5
France	8	7	18	19	4	16	24	24	40	6	37	25	10	14	93	12	9	18	8	14	12	129	6	4	4	4
Angola	3	5	20	19	1	25	14	20	40	5	9	13	8	7	116	10	12	26	3	14	3	121	7	13	23	21
Singapore	3	3	15	19		18	18	16	29	2	14	14	8	5	104	7	11	22	2	11	7	117	8	17	16	11
Italy	8	4	17	17	1	20	19	19	37	5	24	19	6	9	93	6	10	22	7	13	10	116	9	12	11	12
Denmark	3	3	9	10	2	17	11	19	30	3	20	13	7	7	94	9	9	17	7	12	5	114	10	9	9	9
Nigeria	5	3	18	20	2	24	14	21	39	5	10	15	9	7	103	13	13	24	5	12	6	111	11	5	7	7
Egypt	3	2	18	17		21	12	15	33	2	11	12	6	5	102	10	10	22	1	11	6	107	12	16	11	17
Kazakhstan	3	3	22	18	1	17	12	18	33	4	8	13	5	6	103	9	10	23	3	14	5	106	13	14	14	16
Canada	5	5	20	14		19	18	23	33	3	15	13	5	6	86	11	8	23	3	13	10	105	14	7	6	5
Germany	10	4	11	12	1	12	15	18	28	5	25	18	5	6	74	7	5	10	9	6	10	105	14	11	13	10
Azerbaijan	2	4	20	18	2	15	11	19	34	5	8	15	8	9	92	11	12	23	4	15	4	98	16	10	7	8
Brazil	3	5	18	16	1	21	16	19	30	3	8	10	9	7	93	10	10	20	4	11	6	97	17	20	19	12
India	6	4	16	15	2	20	17	20	32	3	9	13	8	6	89	6	9	27	4	13	6	96	18	21	22	28
Malaysia	3	3	12	14	2	15	12	15	30	3	11	11	13	5	83	10	7	21	2	8	4	91	19	18	17	18
Russia	3	2	17	16	1	16	13	18	28	4	13	14	6	6	84	10	7	17	2	14	5	90	20	19	15	22
Ireland	14	5	13	16	3	14	18	23	30	3	21	13	6	10	65	11	6	22	6	12	12	89	21	14	18	15
Qatar	3	3	20	18	2	16	11	15	32	2	10	11	8	4	81	7	8	21	1	13	6	89	21	21	19	24
Algeria	4	2	17	14	1	18	10	12	31	3	8	11	7	4	75	9	8	15	3	8	4	76	23	24	21	48
Libya	2	2	16	12		15	9	15	27	3	6	10	7	4	74	10	11	16	1	9	1	76	23	26	26	29
Saudi Arabia	2	1	11	10	2	12	10	13	25	2	9	11	7	4	66	6	5	13	1	9	5	74	25	27	28	20
China	4	5	16	13	2	15	16	21	25	5	13	14	7	11	65	9	9	17	4	11	7	73	26	25	25	27
Indonesia	2	1	8	7		14	9	12	23	2	4	8	5	2	67	7	5	17	1	4	4	70	27	29	26	25
Spain	5	1	9	8	2	9	13	15	21	4	18	13	4	6	46	6	5	8	7	6	9	68	28	23	24	19
South Africa	2	2	9	11	1	13	14	14	24	3	11	10	7	6	52	7	9	11	2	8	7	60	29	28	29	23
Oman	2	1	9	7		10	6	10	20	2	6	10	5	4	53	3	5	14	1	8	3	56	30	33	47	
Belgium	8	2	7	6	1	7	11	11	16	3	22	15	3	5	27	5	5	7	5	6	6	53	31	30	30	26
Equatorial Guinea		1	7	9		10	5	7	18	3	4	10	3	2	49	4	8	11	3	3	1	51	32	31	31	
Gabon	2	1	8	11		10	5	8	19	3	5	10	3	2	48	3	7	10	2	4	1	50	33	36	33	31

Current Markets for Exporters

	Agriculture	Biotechnology/Life Science	Chemicals	Construction	Creative Industries	Decommissioning	Defence	Environment	Engineering	Financial/Legal	Food, Fish and Drink	Freight/Transport	ICT/Software	Medical/Healthcare	Oil and Gas	Professional Services	Recruitment/Manpower	Renewable Energies	Tourism	Training/Education	Other	Total	Rank in 2008	Rank in 2006	Rank in 2004	Rank in 2002
Sweden	7	3	9	10	2	9	13	13	14	4	12	14	7	6	34	6	8	11	5	6	8	48	34	35	36	30
Mexico	1	1	8	6		12	9	13	19	4	4	11	6	3	45	6	5	13	2	5	4	46	35	32	34	37
Thailand	2	1	10	9		12	9	11	19	2	4	8	4	4	44	4	4	14	1	5	5	45	36	34	36	33
Japan	3	2	5	4		5	10	8	8	2	15	11	3	4	27	4	6	6	2	5	7	44	37	37	35	33
Venezuela		1	8	7		6	6	9	17	4	6	7	5	3	42	6	6	7	2	10	2	44	37	38	39	42
Poland	6	1	7	4	1	6	7	10	11	3	10	9	3	5	31	6	6	7	3	5	5	41	39	42	40	40
Portugal	6	1	7	5		6	10	13	18	3	13	14	3	3	30	5	6	8	5	5	7	41	39	41	42	40
Korea	2	1	10	7	1	9	14	16	16	2	7	9	5	4	35	6	6	14	1	3	6	39	41	44	43	31
Switzerland	5	3	7	4	1	6	6	7	10	2	13	10	3	6	22	4	6	5	3	4	6	37	42	40	44	43
Cameroon	3	2	7	5		8	7	8	13	3	5	11	4	3	32	2	4	8	3	5	3	36	43			
Vietnam	2	2	5	7		6	7	6	13	1	3	6	5	3	32	3	3	9	1	4	2	34	44	43	38	33
Greece	3	1	5	4		7	7	11	10	2	8	8	4	1	25	5	3	8	2	4	3	32	45	39	41	38
Iran	1	1	6	2		5	6	7	10	1	3	7	3	3	30	4	3	5	2	4	2	30	46	45	32	33
Austria	3		7	5		5	6	8	8	2	10	7	3	1	18	3	5	6	3	4	5	29	47	46	46	44
Argentina	2		5	2		4	4	7	9	3	5	10	4	3	26	5	4	7	3	5	5	28	48	47	49	47
Hungary	3	2	5	4		4	5	8	10	3	6	9	3	3	21	3	3	6	2	3	3	24	49	49	50	
Faroe Islands	1		1	2	1	2	2	5	5	2	6	4	2	3	14	3	2	4	2	3	2	17	50	48	45	39
Iraq		1	3	2		2	3	4	6	1	2	6	4	2	15	3	2	3	1	2	1	15	51	50		
Kuwait			3	1	1	1	1	1	4					1	12	1		2		4	3	14	52			
Romania		1	3	3		2	1	3	3		1			1	11	1		3		2	1	11	53			
Trinidad			2	2			1	1	4				1		10	1	1	4		3	1	11	53			
Ghana			2	2			1	3	3					1	10	1		1				10	55			
Tunisia			3	1		1		1	3			1	1		9	1	1	4		2	1	9	56			
New Zealand	1		1			1	2	2	3		1	1		1	7	2	1	3	1	3	1	8	57			
Ivory Coast	1		1	1		1		1	2		1	1			7					1		7	58			
Brunei					1	1		1	1					1	5	1		1		2		5	59			
Chile			1	1		1		2	2			1			4	2		4		1	1	5	59			
Croatia	1							1	2		3	2		1	3	3	1	1	1	1		4	61			
Dubai			2	2	1	1	3	1	2		1	2			4			3		1	2	4	61			
Finland	2		1	1		1		2	3		2	2		1	3	2	1	1	2	2		4	61			
Luxembourg	1		1	1		1	1	2	1		2	1			2				1	2		4	61			
Malta	2		1	1		1		2	3		2	2		1	4	2	1	1	1	2		4	61			
Pakistan								1	2						4	1	1	1				4	61			
Ukraine	1							1	1						3	1		1				4	61			

Appendix 1 - Current Markets for Exporters

	Agriculture	Biotechnology/Life Science	Chemicals	Construction	Creative Industries	Decommissioning	Defence	Environment	Engineering	Financial/Legal	Food, Fish and Drink	Freight/Transport	ICT/Software	Medical/Healthcare	Oil and Gas	Professional Services	Recruitment/Manpower	Renewable Energies	Tourism	Training/Education	Other	Total	Rank in 2008	Rank in 2006	Rank in 2004	Rank in 2002	
Bahrain							1	1			1				2	1		1				3	68				
Colombia															3								3	68			
Congo								1	1						3	1		1					3	68			
Czech Rep.	2		1	1	1		2	3			2	2		1	3	2	1	1	1				3	68			
Iceland							1	2	1						3	1		1		1			3	68			
Philippines	1						1	2	2		1	1		1	3	2	1	1	1	1	2		3	68			
Turkey							1	3	2			1			3	1		1	1	1			3	68			
Antigua								1	1		1				1	1		1					2	75			
Cyprus	1		1	1	1		2	2		1	1				2	1		1		1			2	75	50	47	48
Ecuador								1	1						2	1		1					2	75			
Estonia	1		1	1	1		2	2		1	1				2	1		1		1			2	75			
Latvia	1		1	1	1		2	2		1	1				2	1		1		1			2	75			
Lithuania	1		1	1	1		2	2		1	1				2	1		1		1			2	75			
Namibia															2								2	75			
Slovakia	1		1	1	1		1	1		1	1				2					1			2	75			
Slovenia	1		1	1	1		2	2		1	1				2	1		1		1			2	75			
Sri Lanka			1				1	2	1						2	1	1	1					2	75			
Sudan															2								2	75			
Tanzania	1							1							1			1				1	2	75			
Uganda															2								2	75			
Uruguay								1	1			1			1	1		1				1	2	75			
Afghanistan							1	1															1	89			
Albania								1	1						1	1		1					1	89			
Antartica						1	1						1		1								1	89			
Barbados											1												1	89			
Belarus															1								1	89			
Benin								1	1						1	1		1					1	89			
Bermuda				1			1		1									1					1	89			
Bulgaria								1	1						1	1		1					1	89			
Chad															1								1	89			
Ethiopia	1							1										1				1	1	89			
Falkland Is.				1				1	1								1						1	89			
Georgia				1				1	1								1						1	89			
Gibraltar				1				1	1								1						1	89			

Current Markets for Exporters

	Agriculture	Biotechnology/Life Science	Chemicals	Construction	Creative Industries	Decommissioning	Defence	Environment	Engineering	Financial/Legal	Food, Fish and Drink	Freight/Transport	ICT/Software	Medical/Healthcare	Oil and Gas	Professional Services	Recruitment/Manpower	Renewable Energies	Tourism	Training/Education	Other	Total	Rank in 2008	Rank in 2006	Rank in 2004	Rank in 2002
Greenland								1	1						1	1		1				1	89			
Hong Kong											1											1	89			
Israel								1	1						1	1		1				1	89			
Jordan								1	1						1	1		1				1	89			
Mauritania															1							1	89			
Mauritius											1											1	89			
Morocco								1	1						1	1		1				1	89			
Mozambique															1							1	89			
Panama								1	1						1	1		1				1	89			
Papua New Guinea									1						1		1	1				1	89			
Peru															1							1	89			
Puerto Rico								1	1						1	1		1				1	89			
Senegal								1	1						1	1		1				1	89			
Syria								1	1						1	1		1				1	89			
Taiwan								1	1						1	1		1				1	89			
Turkmenistan								1	1						1	1						1	89			
Uzbekistan															1					1		1	89			
Yemen															1					1		1	89			

Appendix 2 - New Markets for Current Exporters

	Agriculture	Biotechnology/Life Science	Chemicals	Construction	Creative Industries	Decommissioning	Defence	Environment	Engineering	Financial/Legal	Food, fish and drink	Freight/Transport	ICT/Software	Medical/Healthcare	Oil and Gas	Professional Services	Recruitment/Manpower	Renewable Energies	Tourism	Training/Education	Other	Total	Rank in 2008	Rank in 2006	Rank in 2004	Rank in 2002
China	1	1	3	2		5	3	2	7	1	7	2	5	1	25	5	3	3		4	3	32	1	5	11	8
USA	2	2	8	2	2	5	4	4	5		4	3	4	3	24	3	3	5		6	2	27	2	14	27	1
Libya			2	1	1	4		4	9			3	1	1	25	4	2	6		6		26	3	4	1	13
Brazil			5	2		2	1	1	4	1	3	2	2	2	22	1	1	2		3	2	25	4	8	8	2
Malaysia	1		4	2		5	2	1	9	1	1	1	2		22	3	2	4		5	2	25	4	24	20	23
Australia	2	3	5	5	2	4	2	5	5	2	2	3	4	3	20	3	3	5	1	5	1	24	6	6		33
Qatar			7	3	1	6	1	3	9			1	1		23	3	2	5		5	3	24	6	18	16	16
Saudi Arabia	1		6	5		5	2	3	11			2		1	23	4	3	7	1	4	3	24	6	6	7	12
India			1	1		4	2	2	4		1	1	1		22	1	2	6				23	9			28
Kazakhstan			6	5		2		4	5		1	1	1	1	22	3	1	2		3	2	23	9	10	2	5
UAE	1		5	5		5	1	3	8			1			21	3	2	4		2	1	22	11	3	2	8
Angola	1	3	5	4	1	3	5	5	6	2	2	3	2	3	21	1		6		2	1	21	12	2	9	3
Canada	1		2	3	2	1	2	2	4	2		3	3	2	14	4	2	1		5	2	19	13	14		13
Oman			6	3		5	1	3	7			1			19	3	2	4		3	1	19	13	14	9	16
Russia	2	2	3	3	2	2	4	4	7		4	2		2	15	1	1	4		2	2	19	13	1	2	7
Thailand		1	2	2		4	1	1	5	1	1		2		17	3	2	2		2	2	19	13	30	30	27
Indonesia	1		2	3		3	1	1	4	1	1	1	1		15	2	1	2		2	1	17	17	38		27
Singapore			2	2		4	1	2	6	1	1		1		13	2	1	3		2	1	16	18	29	39	27
France	2	1	2	4	1	1	4	3	5	1	5	2	1	2	9	2		2	2	1	1	15				19
Algeria			1			1		1	3			2			14	2	1	1		1		14	20	24	30	6
Kuwait			4	3		5	1	3	7			1			14	2	2	3		2	1	14	20	24	14	21
Mexico		1							1		1	1	1		13	1	1	1		2		14	20	24	27	34
Nigeria			1						4			2	1		14					1		14	20	14	11	3
Bahrain			4	3		5	1	3	7			1			13	3	2	3		2	1	13	24	34	20	23
Yemen			4	3		5	1	3	7			1			13	2	2	3		2	1	13	24	30	20	23
Egypt			1		1	1		2	5			2		1	12	1	2	4		1	1	12	26	22	20	32
Norway			4	2	1	2	3	2	4	1	1	1	2	1	10		3	3		2	3	12	26	18	6	37
Gabon			1			2	1	1	3			2	1		11		1	1				11	28	9	39	16
Netherlands								1	3		4	3	1	1	6	1			1		2	11	28	34		30
Azerbaijan			3			3		2	2			1	1		10	1	1	3		1	1	10	30	10	5	10
Denmark			1	1			1	2	3		2	3	2		8	1	1		1	1	3	10	30	30		44
Hong Kong			2	2		3	1	1	4	1			1		9	2	1	1		1	1	10	30	46	39	34
Ireland								2	4		2	2	1		7	1		1	1	1	3	10				30
Italy	3		2	1		1	1	2	6		4	3	1		8	1		2	1		1	10	30	41		17

New Markets for Current Exporters

	Agriculture	Biotechnology/Life Science	Chemicals	Construction	Creative Industries	Decommissioning	Defence	Environment	Engineering	Financial/Legal	Food, fish and drink	Freight/Transport	ICT/Software	Medical/Healthcare	Oil and Gas	Professional Services	Recruitment/Manpower	Renewable Energies	Tourism	Training/Education	Other	Total	Rank in 2008	Rank in 2006	Rank in 2004	Rank in 2002
Japan			2	2		3	1	1	4	1			1		9	2	1	1		1	1	10	30	41	44	27
Poland	2	1	1	1	1		1	3	5		6	3	2	1	6	1		2	1		3	10	30	38	20	
Spain	2		2	2			2	2	5		4	4	1		7	1		1	1		2	10	30	46	30	
Sweden							1	1	3		3	3	2	1	5	1	1		1	1	3	9	38	46		
Germany	1		1	1			2	2	4		2	2	1		7	1		2	1		1	8	39			
Portugal								1	3		3	3	1	1	4	1		1		2		8	39			
Venezuela			1	2		2		1	5	1	3		2	1	6	1	1	2		1	1	8	39	20		23
Argentina			1			1	1	1	2	1	2		1		5	1	1			1	1	7	42	34		38
Belgium								1	3		4	3	1		4	1			1		1	7	42			
Dubai			2	1		1			2				1		7	1	2	1		2		7	42			
Finland							1	1	3		2	3	2		5	1	1		1	1	3	7	42	30	39	
Ghana		1	2			1		1	1						7	1		1		1		7	42			
Iran			1	1				1	2						7	2	1	1				7	42			
Ivory Coast									3			2	1		7							7	42	10	39	19
Cameroon									3			2	1		6							6	49	10	44	13
Greece								1	3		3	2	1		4	1			1		1	6	49			
Luxembourg								1	3		3	2	1		4	1			1		1	6	49			
New Zealand	1	1			1	2			2						3			2		1	1	6	49			
South Africa	1			2	2	1	1	1	1	1	1	3	2	1	5	2	1	1	1	2	1	6	49			
Turkmenistan			1			2		2	2			1			6	1	1	1				6	49	46	17	30
Uzbekistan			1			2		2	2			1			6	1	1	1	9			6	49			
Austria								1	3		2	2	1		4	1			1		1	5	56			
Czech Rep.	1							2	3		2	2	2		3	1		2	1		2	5	56			
Hungary			1			1		2	3		2	2	2		4	1		1	1		1	5	56			
Latvia	1							2	3		2	2	2		3	1		2	1		2	5	56	41	11	
Malta								1	3		2	2	3		3	2		1	1		1	5	56			
Slovakia	1							2	3		2	2	2		3	1		2	1		2	5	56			
Slovenia	1							2	3		2	2	2		3	1		2	1		2	5	56			
Bolivia								1	2	1	2		1		2	1				1	1	4	63	38		
Cyprus								1	3		2	2	2		3	1		1	1		1	4	63			
Equatorial Guinea						1		1						1	4						1	4	63	34		
Estonia								1	3		2	2	2		3	1		1	1		1	4	63	41	17	
Iceland		1					2	1		1		1	2		2	2	1			1	2	4	63			

Appendix 2 - New Markets for Current Exporters

	Agriculture	Biotechnology/Life Science	Chemicals	Construction	Creative Industries	Decommissioning	Defence	Environment	Engineering	Financial/Legal	Food, fish and drink	Freight/Transport	ICT/Software	Medical/Healthcare	Oil and Gas	Professional Services	Recruitment/Manpower	Renewable Energies	Tourism	Training/Education	Other	Total	Rank in 2008	Rank in 2006	Rank in 2004	Rank in 2002
Lithuania							1	3			2	2	2		3	1		1	1		1	4	63	46	14	
Romania	1		1	1	1		1	2	1	1	1		1	1	2			2		2	2	4	63			
Sudan								1	2			2			4	1	1					4	63	22		
Tunisia								1	2			2			4	1	1					4	63	20	47	36
Vietnam				1		1									4							4	63			
Brunei															3							3	73			
Pakistan							1	1	1						2							3	73			
Peru							1		1			1			3						1	3	73			
Trinidad			1									1			3							1	3	73		
Turkey	1							1	1		1				1			1			1	3	73			
Chile							1		1			1			1	1					1	2	78			
Faroe Islands							1					1	1		1		1			1	2	2	78			
Iraq															2							2	78			
Uganda															2							2	78			
Belarus															1							1	82			
Bulgaria																				1	1	1	82			
Chad	1		1					1	1			1			1							1	82			
Colombia															1							1	82			
Congo															1							1	82			
Ecuador			1		1		1	1							1	1		1				1	82			
Falkland Is.							1	1							1							1	82			
Georgia			1																			1	82	45		38
Gibraltar								1	1							1						1	82			
Korea											1											1	82			
Mauritania									1						1							1	82			
Panama				1			1		1									1				1	82			
Ukraine															1							1	82			

Appendix 3 - Intended Markets for Non-Exporters

	Agriculture	Biotechnology/Life Science	Chemicals	Construction	Creative Industries	Decommissioning	Defence	Environment	Engineering	Financial/Legal	Food, Fish and Drink	Freight/Transport	ICT/Software	Medical/Healthcare	Oil and Gas	Professional Services	Recruitment/Manpower	Renewable Energies	Tourism	Training/Education	Other	Total	Rank in 2008	Rank in 2006	Rank in 2004	Rank in 2002
Denmark	1	3	1	3	2	1	1	1	4		3			1	3			1	1	1	2	7	1	3	18	8
USA		2			1				2	1	2				4	2	1	1		2	2	7	1	1	2	1
France	1	3	1	2	2	1	1	1	4		3			1	3			1	1	1	2	6	3	3	4	2
Sweden	1	3	1	2	2	1	1	2	4		2			1	3			1	2	1	2	6	3	15	18	8
Austria	1	3	1	2	2	1	1	1	4		2			1	3			1	1	1	2	5	5	15	18	14
Belgium	1	3	1	2	2	1	1	1	4		2			1	3			1	1	1	2	5	5	7	18	8
Finland	1	3	1	2	2	1	1	1	4		2			1	3			1	1	1	2	5	5	15	18	6
Germany	1	3	1	2	2	1	1	1	4		2			1	3			1	1	1	2	5	5	3	4	5
Greece	1	3	1	2	2	1	1	1	4		2			1	3			1	1	1	2	5	5	15	18	8
Ireland	1	3	1	2	2	1	1	1	4		2			1	3			1	1	1	2	5	5	15	18	6
Italy	1	3	1	2	2	1	1	1	4		2			1	3			1	1	1	2	5	5	7	18	8
Luxembourg	1	3	1	2	2	1	1	1	4		2			1	3			1	1	1	2	5	5	15	18	14
Netherlands	1	3	1	2	2	1	1	1	4		2			1	3			1	1	1	2	5	5	7	3	4
Portugal	1	3	1	2	2	1	1	1	4		2			1	3			1	1	1	2	5	5	15	6	14
Spain	1	3	1	2	2	1	1	1	4		2			1	3			1	1	1	2	5	5	7	6	2
Brazil									1		1				2		1	1	1			3	16			
Norway				1					2						2							3	16	2	1	8
Canada										1					1	1		1		1		2	18	15	18	19
Oman				1	1				1		1			1	1	1				1		2	18			
Singapore											1				2	1	2		1			2	18			
UAE									2						2					1		2	18	30	18	
Venezuela				1	1				1		1			1	1	1				1		2	18			
Angola											1				1		1		1			1	23			
Argentina									1						1							1	23			
Australia															1	1	1					1	23	3	6	19
Azerbaijan									1						1							1	23	30	34	
Bahrain									1						1							1	23			
Bolivia									1						1							1	23			
China																		1				1	23	30		17
Cyprus	1	1	1	1	1	1	1	1	1		1			1	1				1			1	23	15	6	
Czech Republic	1	1	1	1	1	1	1	1	2		1			1	1				1			1	23	15	6	
Egypt				1	1						1				1		1			1		1	23			
Estonia	1	1	1	1	1	1	1	1	1		1			1	1				1			1	23	7	6	
Hungary	1	1	1	1	1	1	1	1	1		1			1	1				1			1	23	15	6	

Intended Markets for Non-Exporters

	Agriculture	Biotechnology/Life Science	Chemicals	Construction	Creative Industries	Decommissioning	Defence	Environment	Engineering	Financial/Legal	Food, Fish and Drink	Freight/Transport	ICT/Software	Medical/Healthcare	Oil and Gas	Professional Services	Recruitment/Manpower	Renewable Energies	Tourism	Training/Education	Other	Total	Rank in 2008	Rank in 2006	Rank in 2004	Rank in 2002
India											1			1		1		1				1	23			
Japan																		1				1	23	30		17
Kazakhstan									1					1								1	23			
Korea																		1				1	23			
Kuwait									1						1							1	23			
Latvia	1	1	1	1	1	1	1	1	1		1			1	1				1			1	23	7		6
Lithuania	1	1	1	1	1	1	1	1	1		1			1	1				1			1	23	7		6
Malta	1	1	1	1	1	1	1	1	1		1			1	1				1			1	23	15		18
Mexico				1	1						1			1		1				1		1	23			
Morocco											1			1		1		1				1	23			
Namibia															1							1	23			
Poland	1	1	1	1	1	1	1	1	1		1			1	1				1			1	23	7		6
Qatar									1						1							1	23			
Romania															1							1	23			
Saudi Arabia									1						1							1	23			
Slovakia	1	1	1	1	1	1	1	1	1		1			1	1				1			1	23	15		6
Slovenia	1	1	1	1	1	1	1	1	1		1			1	1				1			1	23	15		6
South Africa																		1				1	23			
Switzerland											1											1	23			
Turkmenistan									1						1							1	23			
Uzbekistan									1						1							1	23			
Yemen									1						1							1	23			

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