STUC briefing on Scotland's low carbon and renewable energy economy

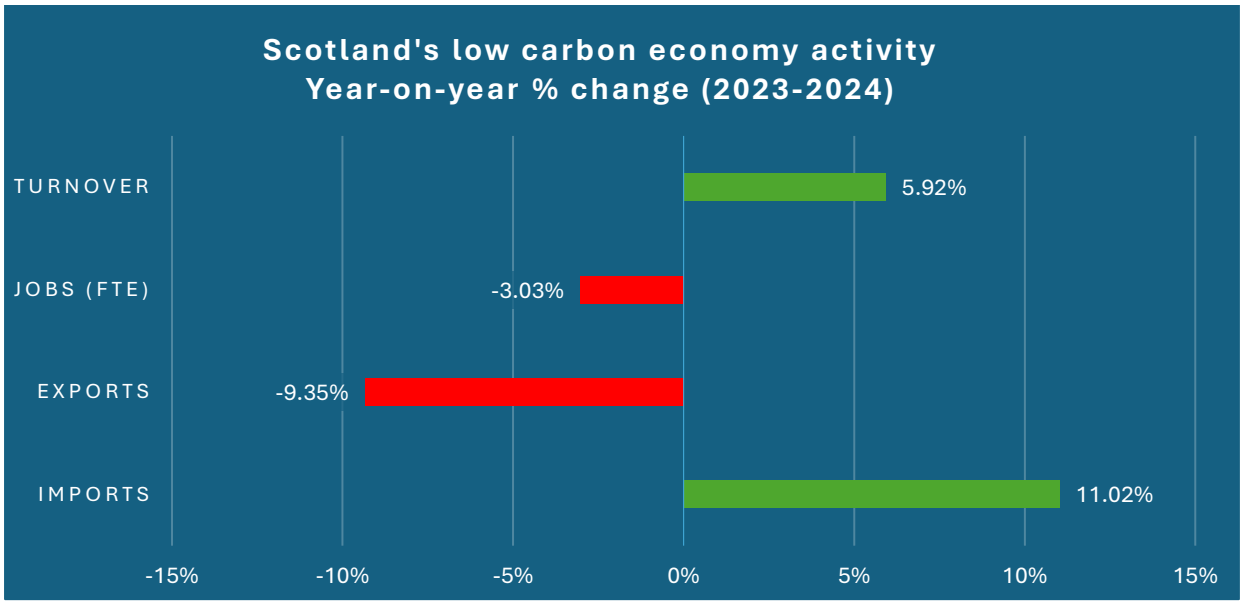
April 2026

The latest ONS data covering economic activity for 2024 in the Low Carbon and Renewable Energy Economy (LCREE) was published in February 2026. The change in activity between 2023 and 2024 across the LCREE is shown in Table 1, with jobs and exports falling as turnover and imports increased. Figure 1 below shows the year-on-year percentage change for each of these areas of economic activity across Scotland's low carbon economy.

Table 1

ONS Low Carbon and Renewable Energy Economy Estimates (Scotland)			
	2023	**2024**	**Change**
Turnover	£12.570bn	£13.314bn	£744m
Jobs (FTE)	36,300	35,200	-1,100
Exports	£711m	£644m	£66.5m
Imports	£1.093bn	£1.214bn	£121m

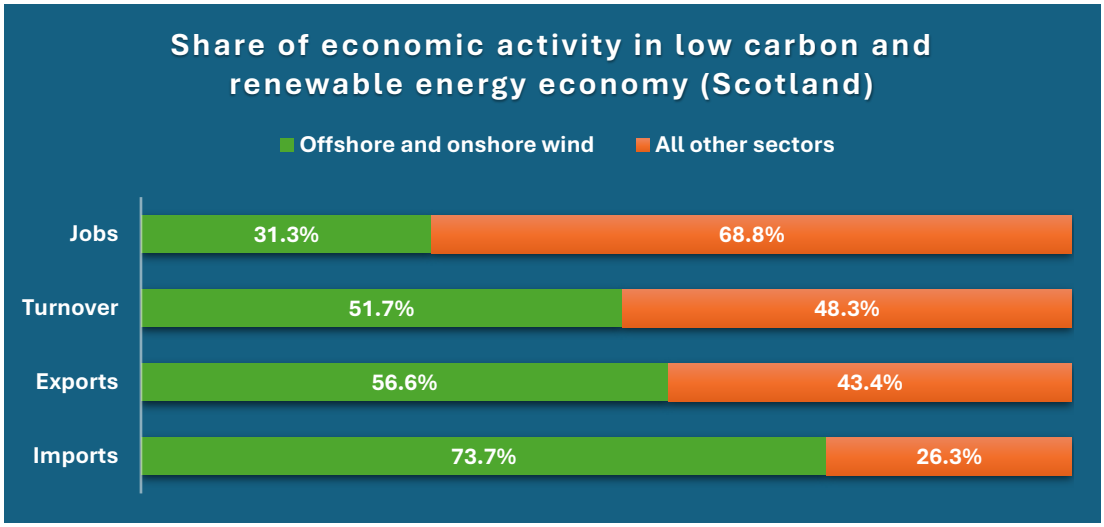
Figure 1



The STUC's previous analysis of Scotland's low carbon economy for 2022 and 2023 highlighted the dominant role of offshore and onshore wind in the overall turnover, imports, and exports figures despite representing a significant minority of jobs.[1]

The data for 2024 shows that offshore and onshore wind continue to make up more than half of the exports, imports, and turnover in the low carbon economy. **Despite this, the offshore and onshore wind sectors provide just 31% of total low carbon jobs in Scotland.** (*Figure 2)*

Figure 2



Jobs in Scotland's Low Carbon and Renewable Economy

The figures in the following page reflect the breakdown of jobs by sector in Scotland's low carbon economy, and the year-on-year change between 2023 and 2024. Offshore wind, onshore wind, energy efficient products, and nuclear power provide the majority of jobs within Scotland's low carbon economy. (Figure *3*)

There has been varying levels of change in jobs within specific sectors across the LCREE, despite the overall decrease between 2023-2024. *Figure 4* shows the change in jobs across different sectors, with significant increases across wind, nuclear, solar, and energy storage systems. However, there is an overall fall in jobs because of sharp declines jobs across energy efficient products & lighting, bioenergy, and LEVs & associated infrastructure.

Our analysis of the ONS data for 2023 published last year highlighted concerns with the limited attention paid to sectors of the low carbon economy related to everyday life and spending.[2] The cars we drive and where we refuel, the lightbulbs, windows, and insulation being installed in our buildings, and the heat pumps and solar thermal providing heat to homes and businesses. There is significant public investment and policy relating to these areas, yet jobs have declined significantly from their level in 2023, as they continue to be overlooked within the Scottish Government's approach to industrial strategy.

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[1] https://www.stuc.org.uk/resources/stuc-mind-the-gap-march24.pdf
[2] https://www.stuc.org.uk/resources/ons-analysis-final-2023-data.pdf

Figure 3

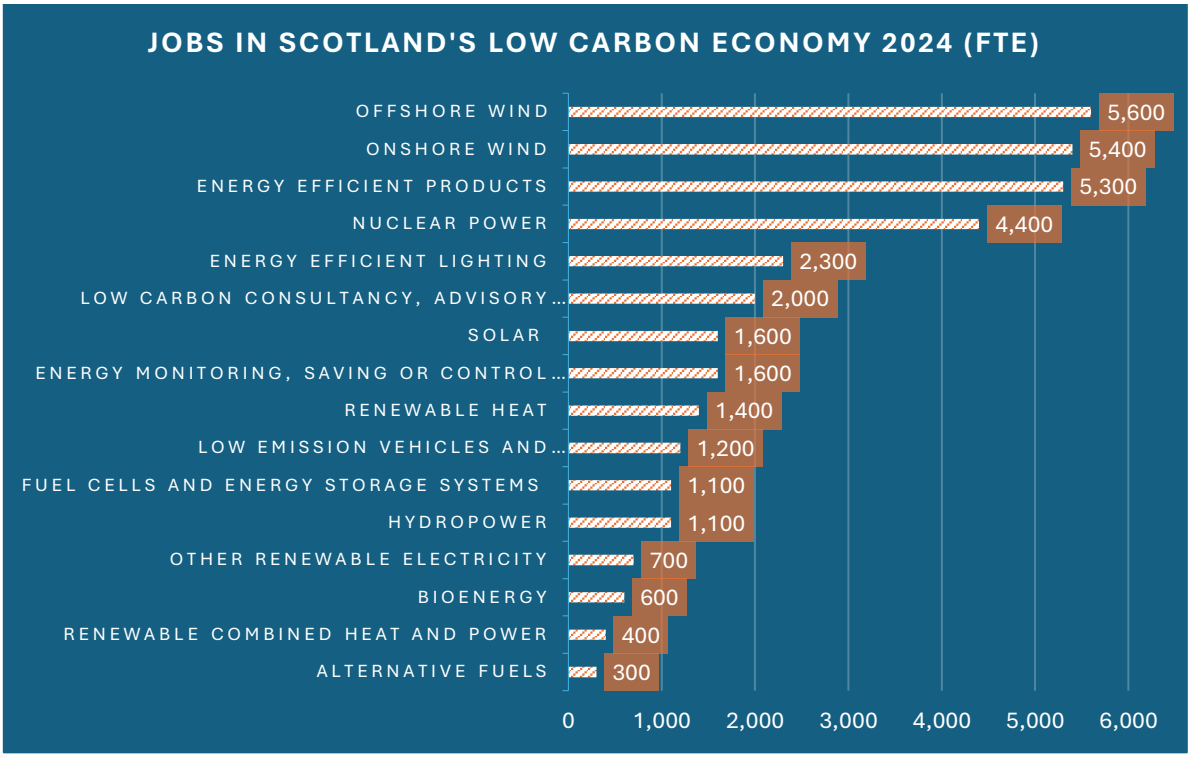
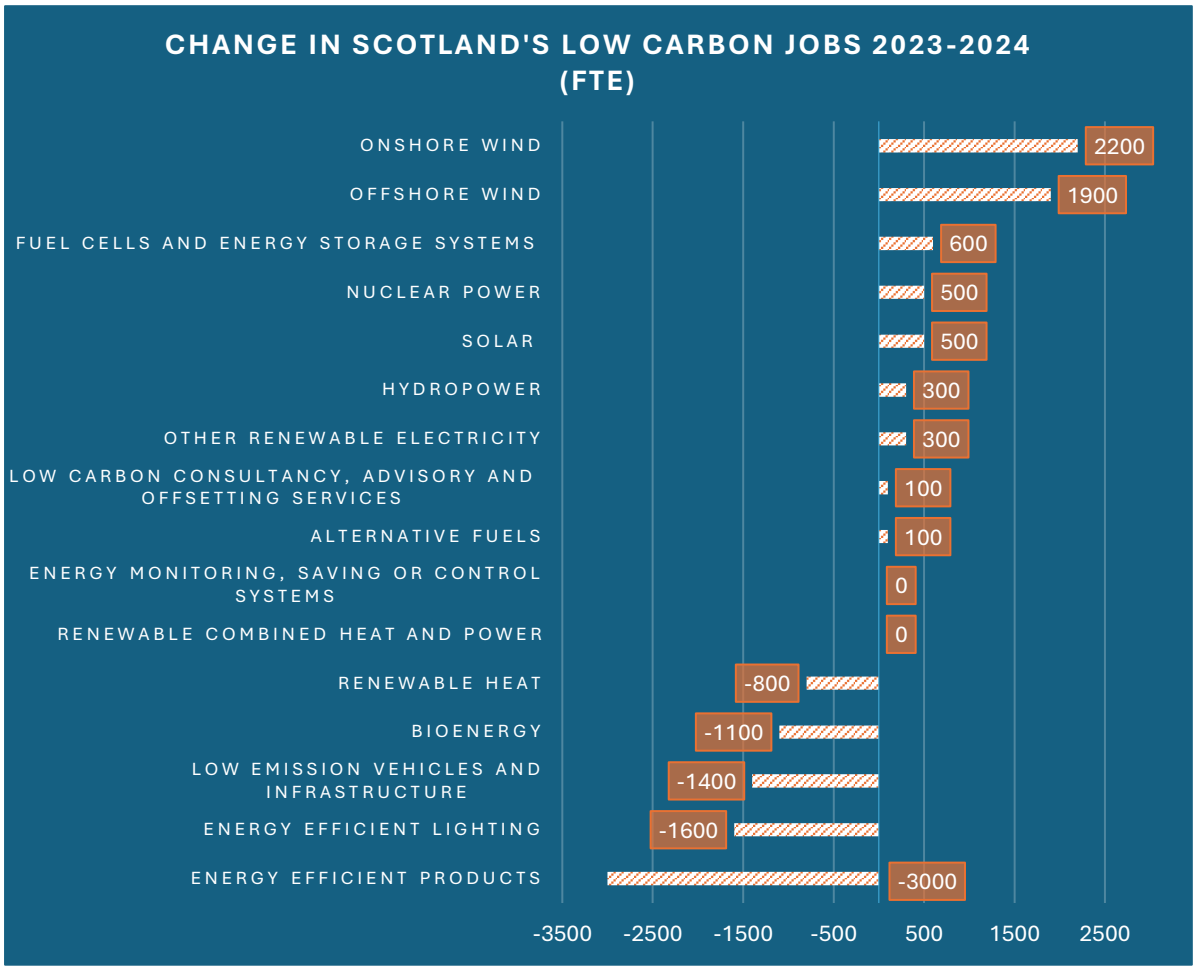


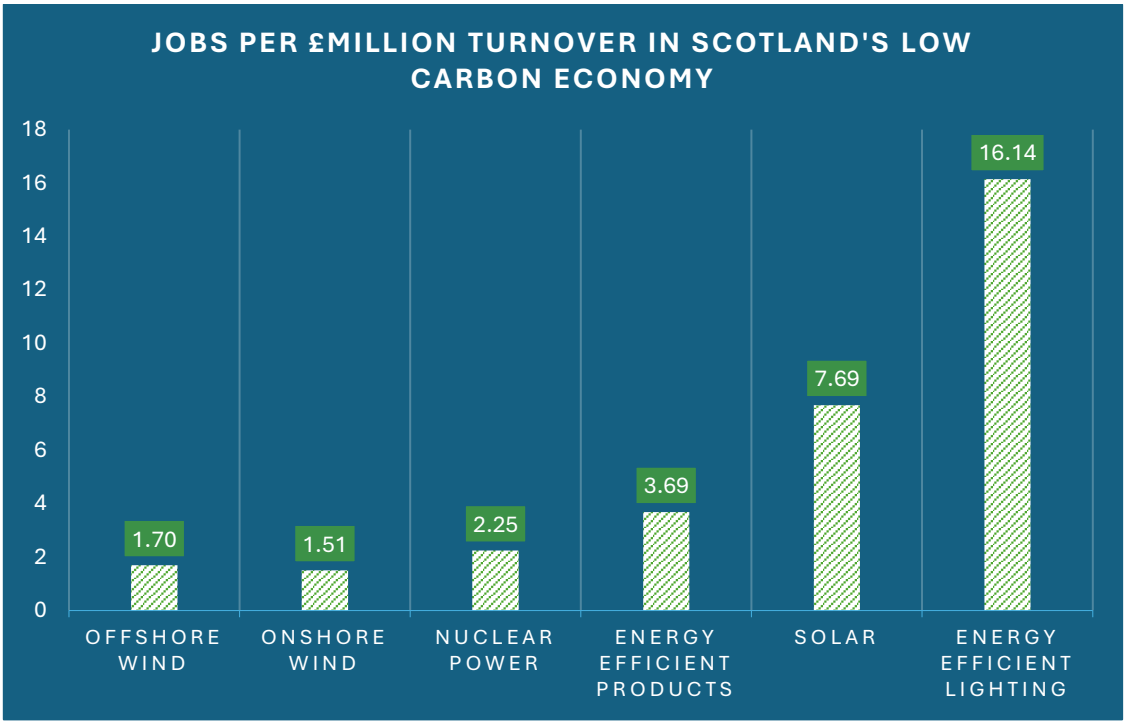
Figure 4



As highlighted in the STUC's analysis of the ONS data for 2023, offshore and onshore wind continue to provide relatively few jobs in relation to turnover than other LCRE sectors.[3] Jobs across the lifespan of a wind farm are concentrated in the manufacturing and construction phases, with comparatively low levels of jobs for their operation and maintenance.

With the Moray West and Neart Na Gaoithe offshore wind farms coming online in 2025, and the 1GW Inch Cape project due to be operational in 2027, this trend is likely to continue.

Figure 5



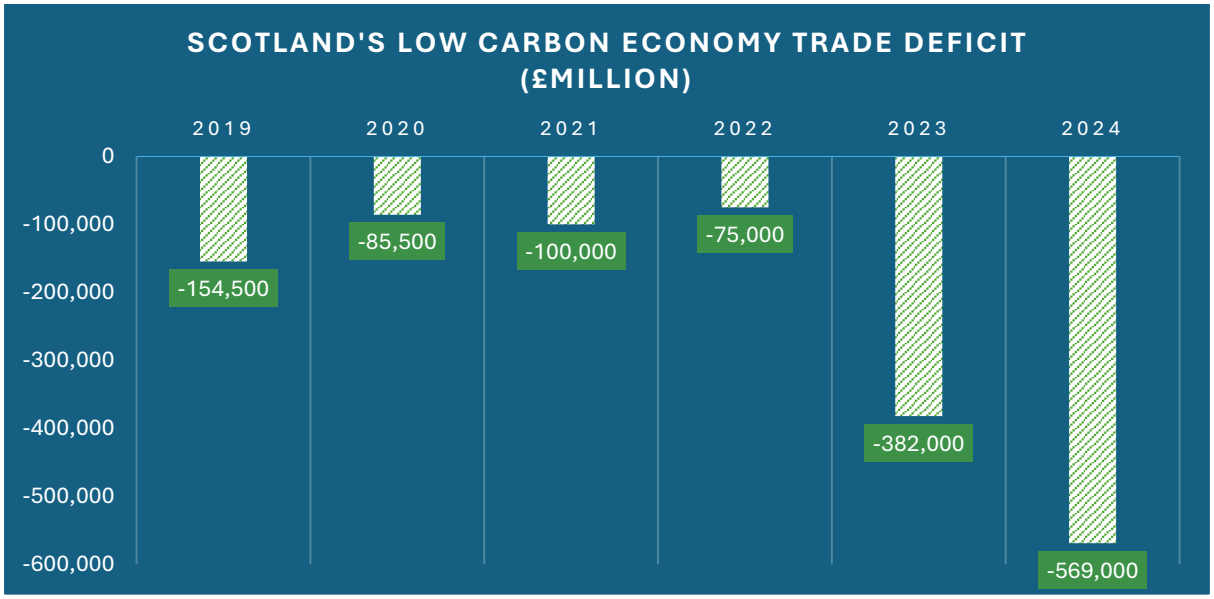
Green economy trade deficit reaches record high

For every year recoded by the ONS, there has been a trade gap in Scotland's low carbon and renewable economy. This gap represents the difference between exports and imports and can be seen to represent Scotland's failure to anchor domestic manufacturing through the growth of renewable energy. **In 2024, the trade gap reached £569m, the highest level since the ONS began data collection began.** *(Figure 6)*

The low level of jobs in relation to company turnover and the record-high trade deficit across Scotland's wind sector are illustrative of a sector dominated by multinational developers with international supply chains. Unlike countries such as Denmark, the growth of onshore and offshore wind in Scotland has not been used to anchor domestic manufacturing, due to a lack of serious industrial strategy incorporating public ownership, investment, and conditionalities.

[3] https://www.stuc.org.uk/resources/ons-analysis-final-2023-data.pdf

Figure 6



Given the exports and imports activity is dominated by offshore and onshore wind, it is no surprise to find that the trade deficit for wind alone was £529m in 2024. This situation reflects broader trends across Scotland's economy, with regional trade statistics published by the Scottish Government showing all Scottish exports have fallen by 15% between Q4 2018 and Q4 2025.[4] In the same period, imports have risen by 4%.

The STUC has repeatedly called for greater investment in domestic wind manufacturing capacity, ensuring local content rules are applied to new projects to secure a predictable pipeline of work. ScotWind developers have committed to invest in Scotland's supply chain, but STUC analysis has shown the manufacturing capacity does not yet exist to capture these commitments.[5]

Notes on the ONS data

The Office for National Statistics publishes estimates of the size of the UK's Low carbon and renewable energy economy (LCREE), including employment and turnover every year. The estimates are based on a survey of 25,000 businesses.

Starting in 2015 (for reporting year 2014) the Office for National Statistics (ONS) 'Low Carbon and Renewable Energy Survey', is the primary source of official information on the LCRE (Low Carbon and Renewable Energy) economy.

The ONS defines the LCREE as "economic activities that deliver goods and services that are likely to help the UK generate lower emissions of greenhouse gases, predominantly carbon dioxide." There are 17 defined sectors which ONS consider to meet this definition.

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[4] https://www.gov.scot/publications/inflation-adjusted-hmrc-regional-trade-statistics-for-scotland-q4-2025/documents/

[5] https://www.stuc.org.uk/resources/scotwind-report-2024.pdf

The ONS LCREE data continues to provide the most comprehensive overview of the state of the sector in relation to employment, company turnover and wider business activity. There are limitations to the data, with coefficients of variation (CVs) for all figures presented by the ONS. In certain years and sectors, figures are not provided either due to confidentiality or because they are below a minimum level of employment or turnover.