

Scotland at Expo Osaka 2025: Evaluation Report

January 2026

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Section 1: Executive Summary

Expo 2025 Osaka took place between 13 April and 13 October 2025 and marked Scotland's second significant participation at a World Expo after Expo 2020 Dubai. As a sponsoring partner of the UK Pavilion, Scotland delivered three themed activation days focused on showcasing Scottish businesses innovation and expertise in gaming & consumer Industries, health technology and offshore wind sectors. These were supplemented by wider company trade missions and ministerial engagement programmes in Tokyo and Osaka to progress collaborations and mutually beneficial trade and investment opportunities with Japanese counterparts.

Key Outcomes

Scotland's activation days were well attended and attracted significant media coverage. Participating Scottish companies have also enjoyed positive outcomes based on Scotland's activity in Japan:

- Forecast export sales with Japan over the next three years in excess of £23m reported by Scottish companies as a direct result of their participation in Scotland's Expo programme.
- Strengthened relationships and advancement of capital investment work with Japanese investors and developers for Scottish ports and infrastructure.
- MoU's agreed and planned with Japanese healthcare companies and ministries, as well as to support Scotland / Japan collaboration in offshore wind technology.
- Increased wider promotion of Scotland in Japan through 212 items of international media coverage across all activation days including broadcast, print and online channels.
- Attracted audiences and guests of more than 550 people to Scotland's activation day events and evening receptions.

Government Engagement

The ministerial programmes strengthened government relations between Scotland and Japan. Over the six months, ministers met with key Japanese health and economy ministries in addition to Japanese space and trade agencies. As a prelude to Expo Osaka, Scotland's First Minister welcomed the UK's Japanese Ambassador on his first official visit to Scotland, alongside several key Japanese investors. The Ambassador was also a guest of honour at our Expo launch event at Scotland House, London.

UK Programme

The Sponsorship contract allowed for integrated Scottish content and participants within the UK's programme. Over the six months, Scottish, companies, panellists, products and marketing content appeared in various elements of the UK Programme. Key highlights are captured in this report.

Scotland's Trade & Investment Envoy

Stephen Baker, Scottish Government Trade and Investment Envoy to Japan, played a pivotal role; presenting activation day events, supporting ministers on the ground and provided experienced advice as part of the project steering group. Stephen has reflected on Scotland's Expo programme and recommendations for a post Expo legacy:

“Team Scotland delivered a well-executed programme at Osaka Expo 2025 with strong collaboration across partners, impactful in-market activity, and positive ministerial participation adding authority to engagements and reinforcing Scotland's ambitions to transform relationships with Japan. Outcomes were strongest where the Scotland team in Japan had sufficient preparation time to brief both sides, align expectations, and

design strategic and productive meetings that allowed for realistic outcomes to be achieved.

While Expo participation was a positive for Scotland this activity alone does not generate long-term results. Greater legacy impacts can be achieved in Japan by focusing on early collaboration with the in market team to define clear objectives that will shape tailored ongoing engagement. Assigning a dedicated Programme & Legacy Lead within the Japan team would support coordinated planning, market input, shape agendas, and drive legacy activity over the year following the Expo event. In addition, given Japan's strategic importance, establishing a permanent market & communications role would strengthen ongoing trade & investment outcomes."

Future Expo Participation

Expo 2025 Osaka again showcased the effectiveness of the Team Scotland approach, delivering a range of event highlights, media coverage, key connections, and positive outcomes that have demonstrably supported our objectives for participation. Future Expo participation should be evaluated on a case by case basis and only if UK Pavilion sponsorship is seen as cost effective and provides scope to progress Scotland's values and priorities with the host nation.

Section 2: Background to Scotland at Expo Osaka

Due to the success and outcomes achieved at Expo 2020 Dubai, we accepted the invitation from the UK's Department for Business and Trade (DBT) to be a sponsoring partner of the UK Pavilion at Expo Osaka, Kansai 2025. Drawing on the "Team Scotland" ethos, we worked in collaboration with Scottish Development International (SDI) and key internal and external partners to develop and deliver a programme of three themed activation days on various dates across the six months of the event. The focus of the activity was defined by overarching objectives to:

- Transform Scotland's diplomatic and business connections with Japan in the same way that Expo Dubai worked for our progressive relations with the UAE;
- Change perceptions of Scotland in Japan and ensure we are seen as an attractive place to do business, trade and invest with; and
- Support Scottish businesses develop and deepen connections by showcasing their expertise and innovative products and services of specific interest to the Japanese market.

Working with Team Scotland partners the Scottish programme focused on sectoral themes of key importance to both Scotland and Japan and agreed dates of delivery with DBT that would provide the optimum opportunities for exposure and engagement aligned to wider Expo & UK themed activity:

- 17 April 2025 - Gaming and Consumer Industries
- 26 June 2025 - Health Technologies
- 18 September - Offshore Wind

A Japan based Project and Programme manager was recruited to provide vital understanding of the Japanese market and priorities as well as being a key liaison between the Scottish Government domestic team and both DBT and SDI in Japan. Senior oversight was provided by a steering group consisting of senior level Scottish Government and SDI officials alongside our Japan Trade & Investment Envoy. This provided vital high-level guidance and authorisation where needed on programme development and delivery.

DBT appointed a sponsorship manager to provide key support and liaison to the UK and wider Expo programmes where needed and ensured Scotland's activity was delivered in accordance with the terms of our sponsorship agreement. This support also provided a vital conduit to our ability to work effectively with the contracted event management company, Bray Leino.

On 12 February 2025, a networking reception was held in Scotland House London to officially launch Scotland's programme for Expo. The event was hosted by the Minister for Business & Employment, Richard Lochhead MSP and was supported by the attendance of the Japanese Ambassador to the UK and over 80 invited guests, including representatives from domestic media.

Section 3: Sponsorship and Budget

Initial engagement with DBT's Sponsorship Team saw an offer of three levels of Sponsor package options at varying levels of cost and scale of participation. Directorate of International Trade and Investment (DITI) officials worked with DBT to negotiate a more bespoke package that provided the level of access and permissions within the UK Pavilion that better suited a Scottish presence aligned with our capacity to deliver as well as our objectives and priorities for participation. Key aspects of the agreed Sponsor Package for Scotland were:

- Takeover of the UK Pavilion to deliver three business focused Scotland days on agreed dates across the six months;
- Integrated promotional story content as part of the UK's digital visitor journey;
- Promotion of Brand Scotland digital assets looped throughout Scotland days;
- Integrated communications and marketing content within and in tandem with UK's marketing campaigns in the lead up to and throughout the timescale of the event;
- Participation of Scottish speakers, panellists, companies and thought leaders to opportunities within the UK and wider Expo programmes.

Approval for this participation package and sponsorship costs was agreed by the Cabinet Secretary Economy in early 2024.

DITI had existing Expo budget set aside to cover the Sponsorship fee, the costs for development and delivery of three agreed Activation days in the UK Pavilion, event management costs and recruitment of an in-market Project and Programme manager. In addition, allocated budget was used to support costs of delivering ministerial engagement programmes and financial support for Scottish companies to be in Japan to participate at Expo and the associated SDI led trade mission programmes.

Pressures on available budget were managed by spreading costs of all aspects of development and delivery over two financial years (2024/25 – 2025/26). Overall Scotland's programme was delivered with a modest underspend against the allocated budget:

Section 4: Partner Support and Stakeholder Engagement

Development and delivery of Scotland's Expo programme within the UK Pavilion and wider activity in Tokyo and Osaka was supported through engagement and collaboration with key partners and organisations. This included:

- Scottish Enterprise and the SDI team in Tokyo;
- The Scottish Government's Trade and Investment Envoy to Japan, Stephen Baker;
- The British Embassy in Tokyo and the Consulate General in Osaka;
- The UK Pavilion team at Expo
- The UK Government Department for Business and Trade – domestic & in market
- The Consulate General of Japan in Edinburgh
- The Japanese Embassy in London;
- Food and Drink Scotland;
- Seafood Scotland.

UK Government & Embassy in Japan

DBT's Janette Murphy, our Sponsorship Manager, provided key liaison and support for Scotland's programme at Expo Osaka. In addition, engagement with and from the following people and teams provided invaluable support, resource, advice and guidance to Scotland's team and our programme of activity:

- Julia Longbottom, UK's HMA to Japan;
- Carolyn Davidson, UK's Commissioner General for UK at Expo 2025 Osaka;
- UK Embassy & UK Pavilion teams

Activation days and trade missions

In support of our Expo programmes in April, June and September we garnered support and engagement from a range of Scottish and Japanese companies and organisations who participated in panel sessions, were keynote speakers and showcased their innovative ideas, solutions and products.

Gaming – Scottish companies & organisations

- Scottish Games Network – for the promotional showreel of wider Scottish companies
- Speech Graphics
- Wardog Studios
- Yaldi Games
- Blazing Griffin
- GLITCHERS
- Buildstash Limited
- Konglomerate Games
- 4J Studios
- KeelWorks

Gaming – Japanese companies

- Q-Games
- Ludimus
- iGi
- Japan Online Games Association
- Bandai Namco
- Square Enix.

Consumer industries

- Arbikie;
- Brave New Spirits;
- D&M Winchester;
- Edinburgh Teahouses;
- Goldfinch Whisky Merchants;
- Hebridean Smokehouse;
- Loch Duart Salmon;
- Summerhall Distillery;
- 8 Doors Distillery;
- Ishga;
- Supernature Oil;
- POTR.

Musical entertainment

- The Association of Exiled Scots

Health technologies

- West of Scotland Innovation Hub;
- North of Scotland Innovation Hub;
- South East Regional Innovation Hub;
- Canon Medical Research Europe;
- University of Stirling;
- NHS Scotland.
- Touchlab;
- Konpanion;
- NamiSurgical;
- iGii;
- J&D Wilkie;
- Talking Mats.

Offshore wind

- Eyemouth Harbour Trust;
- Highland Deephaven;
- Orkney Harbour;
- Fraserburgh Harbour.
- Enerfloat;
- EODEX;
- ETZ Ltd;
- James Fisher Renewables;
- OEG Group.
- SSE Pacifico;
- Floating Offshore Wind Technology Research Association, FLOWRA;
- Wajima Floating Offshore Wind.

Media

TV Asahi who showcased their promotional documentary at Expo featuring Scotland's world-class onshore and offshore wind sectors

Section 5: Event Management

Bray Leino were the UKG's contracted event management company for the UK Pavilion for the whole six months of the Expo event. As a sponsoring partner we were obliged to use their contracted services, which in operational terms supported a consistent approach and reduced risk to event management delivery. This also allowed us to access existing in-house equipment at no extra costs.

Regular engagement was maintained with Bray Leino throughout programme development helping secure the services, logistics, equipment and room set up required within the UK Pavilion. Continual negotiation and challenge around their estimated costs was a recurring element but this did result in significant savings and maximum value being achieved for the support provided. The Scotland team on the ground worked closely with Bray Leino during activation days to ensure appropriate event management support met our needs.

Unfortunately, Scotland's first activation day in April, which was also the first full week of events at Osaka, did experience some teething problems around event management delivery. However, the Scotland team on the ground in Japan worked closely with Bray Leino to overcome those challenges and ultimately ensured delivered of a successful event day. Bray Leino did take subsequent steps to improve service levels for Scotland's remaining events ensuring event management fully met our needs and supported delivery of very successful events in June and September. We are grateful for their support.

Section 6: Scotland's Activation Programme

The detail in this section provides key highlights of the programme of activity delivered across the agreed activation dates in the UK Pavilion at Expo Osaka and the associated trade missions in Osaka and Tokyo. Detailed content is provided at Annexes A to D.

April - Gaming

On 17th April 2025 Scotland delivered its first Expo activation event focused on gaming & creative industries in partnership with Codebase. This Expo activity was supplemented by a Techscaler trade mission delivered in the week leading up to the activation event. The trade mission consisted of eight Scottish gaming start up studios and companies who undertook a range of key introductory engagements with Japanese counterparts based in Tokyo and Osaka.

Image of mission delegates outside a building



Image of mission delegates outside Osaka event site



The Expo activation day consisted of two morning panel sessions with key speakers and experts in the sector from both Japan and Scotland and an afternoon public facing gaming showcase which also included attending media. The days events were supported and by the Minister for Business & Employment, Richard Lochhead MSP who provided opening remarks and chaired a panel session.

Image of panellists on stage in UK Pavilion



Key Outcomes

- Participating companies have generated immediate export sales of £325,500 in the Japanese market
- Participating companies reporting **forecast Japanese export sales over the next three years totalling £3.6m.**
- Participants made 32 new connections, generated 15 leads, and secured 5 new contracts

April - Consumer Industries

On 17th April in addition to the daytime Gaming Activation at Expo Osaka an evening Consumer Industries showcasing reception was held in the UK Pavilion. The Expo evening reception showcased 14 Scottish brands with welcome speeches delivered by Minister Lochhead and the Commissioner General for UK at Expo. Scottish musical performances were provided by The Association of Exiled Scots.

Image of UK Expo Commissioner in the UK Pavilion



In tandem with the Expo activity a consumer industries mission of Scottish companies undertook a series of market briefings, visits, one to one buyer meetings and showcasing & networking receptions in Tokyo and Osaka between 14th and 17th April 2025. Market briefings and visits were supported by key in market stakeholders, Japanese consumer industry counterparts, Seafood Scotland and the Minister for Business & Employment, Richard Lochhead MSP. Some 45 one to one meet the buyer meetings took place with key industry players. The showcasing & networking reception in Tokyo was attended by over 100 guests with Minister Lochhead and HMA to Japan providing welcome speeches and musical entertainment provided by traditional Scottish musicians and a Japanese Taiko drumming group.

Image of Minister Lochhead and HMA Longbottom standing with Hello Kitty



Key Outcomes

- Agreed deals with Japanese counterparts; secured listings in department stores; new leads generated; new and increased orders secured, product placement and sales in the UK Pavilion gift shop and produce on the UK Pavilion Café menu
- Participating companies reporting estimated forecast sales **over the next three in excess of £7.6m**
- Launch of a Scottish mackerel promotion in the Aeon Supermarket
- POTR and PekoeTea Edinburgh live selling and customer engagement at Ginza Loft.

June - Health Technologies

The Healthtech activation Day on 26th June at Expo Osaka delivered a series of panel sessions with key experts and speakers, including two in-market Global Scots, showcasing Scotland's ageing and digital health capabilities and a subsequent evening reception which attracted over 100 high-ranking life science representatives from Kansai.

Image of panellists on stage in the UK Pavilion



image of Cabinet Secretary Gray on stage in the UK Pavilion



The activation event was supplemented by a trade mission delegation of six Scottish companies and seven speakers in Tokyo and Osaka for five days of engagement activity between 23rd and 27th June 2025 led by the Cabinet Secretary for Health & Social Care. The delegation engaged with Japanese industry stakeholders, accelerators, clusters, and government officials, helping to expand Scottish business networks and drastically increase understanding of the Japanese Healthtech market and market entry strategies while reinforcing Scotland's growing reputation as a leading global Healthtech innovation partner.

Image of Cabinet Secretary Gray with mission delegates inside the UK Pavilion



Key Outcomes

- Participating companies reporting forecast sales of £9.4m over the next three years.
- MOU signed between one of the Scottish company delegates (Talking Mats) and their Japanese partner.
- Plans to explore collaboration/MOU with the Japan Health Ministry, specifically focusing on the mutual challenges Scotland and Japan share
- Development of an official SDI Japan Healthtech Trade Development Opportunity (TDO) to create new trade pipeline with plans to execute over the next two years.
- JETRO and SDI investigating a formal relationship through joint agreement or MOU to support companies to trade and collaborate in Japan.
- Securing of Canon Medical Edinburgh team's long-term future through successful multi stakeholder meeting with Canon Inc. leadership from Japan.

September - Offshore Wind

On 18th September we delivered Scotland's final activation day at Expo Osaka where five Scottish companies in the offshore wind sector and four of Scotland's ports and harbours participated in panel sessions showcasing Scotland's offshore wind expertise from policy and government support to construction and maintenance. The ports and harbours took part in a pitching session to make connections that would support potential capital investment. A preview of an SDI commissioned documentary by TV Asahi highlighted the economic potential of growing the floating offshore wind sector in Japan and showcasing Scotland's expertise supporting that ambition.

Image of panellists on stage in the UK Pavilion



Between 16th and 19th September in Tokyo and Osaka trade mission events were delivered in the Ambassador's residence in Tokyo alongside a ministerial programme led by Cabinet Secretary Martin. This activity powerfully showcased Scotland's world-leading offshore wind capabilities and reinforced its reputation as a trusted partner for Japan's energy transition. The activation events and trade mission secured strong attendances and key engagements achieving highly positive feedback from Japanese stakeholders, industry, and media.

The participating companies in Tokyo and Osaka were;

- OEG,
- Eodex,
- James Fisher Renewables,
- Enerfloat and Energy Transition Zone.

The four ports and harbour represented were;

- Eyemouth Harbour Trust,
- Fraserburgh Harbour,
- Highland Deephaven,
- Orkney Islands Council.

Key Outcomes

- Strengthened relationships with Japanese investors and developers, with advanced discussions on capital investment for Scottish ports and infrastructure.
- New business leads for Scottish supply chain companies, with forecasted international sales already claimed.
- Participating companies reporting **£2.5m of international sales over the next three years.**
- Scotland positioned as a model for Japan's offshore wind ambitions.
- High profile media campaigns raising Scotland's profile in the Japanese energy sector.
- Hitachi announcing a £3 million Engineering Centre of Excellence in Glasgow, creating around 90 specialist roles to support the UK's net-zero transition.
- MoU between Japan's Floating Offshore Wind Technology Research Association and Scotland's European Marine Energy Centre to collaborate on floating offshore wind technology.

Section 7: Ministerial Programme

As part of our wider Expo Osaka Programme three Ministerial visits were undertaken to support and align with each of Scotland's three activation days at Expo but also to support the accompanying company trade missions. More than 50 Ministerial business focused engagements with senior delegates and business leaders in Japan were delivered, focusing firmly on the sectors relevant to our activation day themes, supported by some supporting diplomatic and cultural engagements with Japanese leaders.

April – Gaming & Consumer Industries

The Minister for Business, Richard Lochhead MSP, visited from the 14th to the 18th April to engage with the Japanese Government, lead Scotland's Expo Activation Day on 17th April, join up with Scotland's trade mission focusing on consumer industries and engage in a series of trade and investment focused meetings across the week.

In meeting with some top gaming companies within Japan, the minister was able to outline Scotland's strengths within the sector and discuss shared opportunities going forward. Further engagement will be planned within this sector to understand the potential for growth within the sector, on the back of this visit and Design, Innovate, Communicate, Entertain (DICE) conference which took place in Scotland in September.

This visit kickstarted Scotland's activity in Japan, delivering on 2 evening receptions alongside our first day of Expo activity in the UK Pavilion.

June – Health Technologies

The Cabinet Secretary for Health and Social Care Neil Gray's visit was delivered from the 23rd to the 26th June. The visit offered the chance to engage with the Japanese Ministry for Health, Labour and Welfare to discuss our shared challenges in areas such as caring for an aging population. Additional Health focused meetings were delivered in engaging with Canon Medical, AstraZeneca and Reprocell to discuss opportunities for Scottish Companies.

The Cabinet Secretary met with Sumitomo Electric to build upon the relationship he had built with the company's chair, Mr Matsumoto, from his meeting in 2023. This meeting was important to reiterate Scotland's commitment to working with Sumitomo on shared goals including the success of their cable factory at Nigg.

The Cabinet Secretary was also invited to attend the King's Birthday Dinner in the Embassy as part of this visit, addressing the audience and engaging with VIP's from the Japanese business sector.

September – Offshore Wind

The Cabinet Secretary for Climate Action and Energy visited Japan (Tokyo and Osaka) from the 16th to 19th September to showcase Scotland's offshore wind sector.

The visit emphasised Scotland's commitment to working with key investors such as JBIC, Mitsui, Hitachi, Marubeni and Sumitomo. There was a broad recognition of the scale of renewable investment opportunities that Scotland has to offer in addition to some concern expressed about challenges such as grid connection dates and order pipeline.

A key part of the visit included announcement of a £1.7m grant for Hitachi from Scottish Enterprise to secure overall investment of over £3m and deliver around 90 jobs at a new Engineering Centre of Excellence in Glasgow.

An MoU between European Marine Energy Centre (EMEC) and Japan's Floating Offshore Wind Technology Research Association (FLOWRA) was also signed during the visit with the aim of exploring possibilities for collaboration in establishing a new floating offshore wind demonstration site in Japan.

The visit provided a strong platform to showcase Scotland's approach to developing the offshore wind sector; identify opportunities to share knowledge and expertise especially in relation to innovation and floating technology; and hold high level discussions with significant investors and supply chain companies with aim of attracting further future investment to Scotland.

Section 8: Marketing, Comms and Social Media

The detail provided here is a high level summary of the Marketing, Comms & Social Media Activity that supported the Scotland at Expo Osaka, Kansai 2025 programme.

Expo 2025 Osaka, Kansai provided opportunities to increase awareness of Scotland's strengths and opportunities for mutually beneficial partnerships, with Japanese audiences. **Scotland's unique selling points were highlighted through in-country media engagement with 212 items of coverage across broadcast, print and online increasing reach in Japan.**

This included top tier and B2B coverage on:

- Yomiuri TV,
- Mainichi Shimbun,
- Nikkei Gaming,
- Nikkei XTrend,
- 4Gamer.net,
- JIJI Medical,
- Suisan Keizai,
- Yomiuri Shimbun,
- the New Energy Journal,
- Wind Journal, and
- Toyo Keizai.

To highlight Scotland's presence at Expo 2025 Osaka, Kansai, five new pages were created on the SDI website, including a Japanese translation of the landing page. Event highlights were also promoted internationally through SDI LinkedIn and ScotlandinJapan on X.

Throughout the full six months Scotland's Brand Marque logo was a permanent feature of the UK Pavilion sponsor branding. On Scotland's Activation Days the logo was front and centre alongside looped digital marketing films highlighting Scotland's story aligned to each the Activation theme sectors. Stories of Scottish innovation in the Space, offshore wind and life sciences sectors were key features of the UK Pavilion's interactive digital Visitor Journey.

Section 9: Wider Scottish Engagement

UK National Day

Scottish representation was in the form of performances by the Royal Edinburgh Military Tattoo and Scottish singer, Nina Nesbitt. Royal Edinburgh Military Tattoo featured throughout national day including a parade on the top of the Grand Ring watched by some 500 people; a UK Pavilion performance and flag raising ceremony; and a special evening performance along side the BBC Planet Earth III LIVE in concert. Scottish singer, Nina Nesbitt was chosen specifically by DBT and she delivered two performances to audiences of around 800 people.

Image of Pipe band marching at the Expo event site



Image of female singer on stage at the Expo event site



Scottish programme entertainment

Traditional Scottish musical entertainment delivered by The Association of Exiled Scots supported the April gaming activation and consumer industries reception at Expo Osaka and the pre Expo evening reception in the UK Embassy in Tokyo.

Image of musicians and singers on stage in the UK Embassy



Traditional Japanese Taiko performances were delivered at evening reception events as part of the April and September programmes in Tokyo and the UK Pavilion at

Osaka. A bagpiper provided traditional Scottish entertainment outside the UK Pavilion throughout the day of both the June and September Activations.

Images of drumming group and bagpiper outside the UK Pavilion



Image of bagpiper playing outside the UK Pavilion



UK Pavilion shop

Two Scottish companies benefitted from product inclusion in the UK Pavilion shop - POTR origami plant pots and Edinburgh Natural Skincare. Over 1,000 of their bespoke products were sold over the duration of the six months of Expo

UK Festival of Flavours

The UK's Festival of Flavours took place in the UK Pavilion on 14th and 15th June and offered an immersive tasting experience of the produce on show. This included a range of produce from some of Scotland's best known food and drink brands: Dean's; Seafood Scotland; Tunnock's; Walkers Shortbread; Pekoe Tea; and Thompson's Gin

Images of food products



UK Missions Programme

Between 9th and 14th June, Isle of Barra Distillers represented Scotland as part of a UK Food and Drink Trade Mission. This mission supported Isle of Barra to undertake a range of business to business engagements, networking evening receptions and meet the buyer events in both Tokyo and Osaka.

Blazing Griffin, who were part of Scotland's April Gaming delegation, represented Scottish interests as part of the UK's video gaming trade mission which took place between 14th and 25th July. During this mission delegates connected with industry players in Tokyo; attended the BitSummit independent games festival; and engaged with the specially curated Video Games Transforming Lives exhibit at Expo Osaka.

Section 10: Expo Legacy

Participation at Expo Osaka and the wider connections made through the trade missions and ministerial engagement across the six months, has provided Scotland with a platform and focus for continuing engagement in and with Japan. As part of our efforts to maintain the progress made during these six months and the key objectives of Scotland's programme at Expo and wider engagement in Japan, we are now focusing on developing a defined Expo Legacy Plan.

The core objectives of the Plan are to:

- Build on new partnerships and connections made through the Expo programme as well as further progress existing partnerships
- Deepen bilateral ties in trade and investment, aligned specifically to the four sectors promoted at Osaka EXPO (gaming, consumer industries, health technology and energy).

We are already working with SDI in collaboration with other Team Scotland partners to develop a framework for delivering a campaign of sustainable short- and long-term business and Government engagement alongside focused media and Brand Scotland marketing activity that will position Scotland as a modern, innovative nation recognised by Japanese stakeholders as a world-class business partner of choice.

Impacts and outcomes will be measured through a range of indicators such as estimated export sales for Scottish companies and the number and value of inward investment enquiries and trade leads generated. Broader outcome measures will include social media reach and engagement, as well as print, broadcast, and online media coverage highlighting Scotland's strengths and international profile.

Section 11: Case Studies and Testimonies

Case Study - Unlocking Growth in Japan through Expo Osaka 2025

Brave New Spirits, an innovative and award-winning independent bottler and blender of Scotch whisky based in Glasgow, has established a reputation for its diverse portfolio, offering a wide range of single malts and blended whiskies, catering to both specialist retailers and high-volume supermarkets across more than 30 countries. Despite international recognition, including multiple gold and master awards from the IWSC, Whisky Magazine, Scottish Whisky Awards, Tokyo Whisky Awards, and Spirits Business Magazine, the Japanese market – the 7th largest market for Scotch whisky by value and the 4th largest market by volume in 2024 - required a strategic approach to unlock significant growth. This presented significant opportunities for Brave New Spirits, Whisky Heroes collection and the Cask Masters range of Single Malts, with a label design inspired by the Japanese paper-cutting art of Kirigami.

Brave New Spirits have been nurturing relationships in Japan for several years, building a network of retail partners with the support of Scottish Development International (SDI). Their participation in SDI's Japan roadshow and Scotland's Osaka Expo programme in April 2025 provided direct access to key decision-makers in the Japanese retail sector. Minister Lochhead accompanying the mission provided access to more senior leadership and added credibility to engagements - instrumental in converting long-standing discussions into tangible sales.

Export Director Tomek Weselik, says:

“The Osaka Expo mission came at just the right time for us as we had been in discussions with various partners and starting to do some good business. Participating in SDI's mission and being accompanied by Minister Lochhead helped to add credibility to these discussions. For one retail partner who we had been engaging with for over two years, after meeting their senior leadership during the Mission and visiting their store, we landed a significant new order, just weeks after coming back to Scotland.

“We are now supplying major Japanese supermarkets including Donki, Aeon as well as Department Store Isetan with our volume products. We also distribute our premium whiskies to specialist shops and bars. Plus we are not far away from finalizing sales to major supplier of bulk whisky for Japanese distilleries.

“The global environment for whisky – like many premium and luxury products – is difficult at the moment but the Japan market has been a success for us. The support from SDI – through introductions to buyers and opportunities to network – has played a big part in that success.”

The company forecasts an additional £4 million in export sales in Japan over the next three years as a result of participating in the Mission and the support delivered by SDI in the run up to it. The company also picked up two awards at Whisky Magazine's “Icons of Whisky” 2026 awards in December 2025 – Independent Bottler Of The Year & Sales Team of The Year – in part, as a result of the success they had achieved in the Japanese market.

Brave New Spirits' experience demonstrates the value of targeted trade missions and strategic partnerships. The support from SDI, combined with a compelling product portfolio and persistent relationship-building, enabled the company to overcome market challenges and achieve substantial growth in Japan.

June Activation – Company Case Studies:

Konpanion, a pre-revenue SME developing companion robots, reported that the Expo was highly beneficial in connecting with healthtech opportunities in Japan and strengthening ties within the Scottish healthcare ecosystem. Since the visit, Konpanion has established a working relationship with TOA Corporation, a Japanese sound equipment manufacturer, and secured a place on the Shibuya Startups accelerator in Tokyo. Additionally, the company has forged close links with the Dementia Services Development Centre at the University of Stirling and NHS Scotland's Regional Innovation Hubs, highlighting the advantage of combining companies and clinical leads in overseas missions.

iGii, a larger SME specialising in carbon nano materials, has converted Expo connections into tangible commercial progress. The company recently received a £25,000 purchase order from Immunosens Ltd, an Osaka-based innovation lab, to undertake electrode customisation and proof-of-concept work. This engagement is expected to lead to a licence and supply chain agreement in 2026. Immunosens will visit iGii in Scotland next year, and iGii is planning two further trips to Japan to advance discussions with major industry players including Kainos, Sysmex, Shimadzu, Sekisui and MetaWater.

Touchlab, a scale-ready company manufacturing touch sensors for robotics, also leveraged the Expo to accelerate its international ambitions. Following a successful pitch to join a Japanese accelerator, Touchlab has committed to return to Japan in January 2026 as part of Innovate UK's Robotics & Automation Manufacturing Global Business Innovation Programme. This opportunity positions the company to explore manufacturing partnerships and expand its global footprint.

September Activation – Company Case Study – OEG

OEG, a leading global energy solutions business, has been active in the Asia Pacific region for more than 20 years. We first entered the offshore wind sector in Taiwan in 2017 and have since grown our local presence with an in-country team, a broad range of topside and subsea equipment, and 4 Crew Transfer Vessels. Our track record in Taiwan spans wind turbine and blade maintenance, high-voltage operations, temporary power services, subsea work using Remotely Operated Vehicles and Electric Controlled Flow Excavator, cable support, offshore substation maintenance, and marine coordination and Crew Transfer Vessel operations. This experience forms the foundation of our capability in the region.

Building on this, OEG has expanded into Japan and Korea in recent years, establishing a Korean entity in April 2024 and our Japanese entity earlier in 2025. In Japan, OEG has successfully delivered Remotely Operated Vehicle services for the Akita Noshiro project, and this year, we also provided blade maintenance for the Ishikari project, as well as temporary power and turbine campaign services for the Hibikinada project. These early achievements demonstrate our ability to support Japanese offshore wind developers with specialised engineering and offshore operations services. In Korea, OEG has supported the Jeonnam 1 project by delivering temporary power and marine coordination services.

Leveraging strong execution experience in Taiwan and a proven technical track record in the UK and Europe, OEG is well positioned to continue supporting offshore wind development across the Asia Pacific region, including Japan and Korea, as markets progress toward construction and O&M (Operations and Maintenance) phases.

Company Testimonies

Selected feedback from participating companies across the Programme:

“Our experience on the Techscaler Japan programme broadened our horizons, both connecting us with the Tokyo startup ecosystem, and opening doors for us in building relationships with Japanese game studios. We came away with a much better understanding of how to do business in Japan, many new connections, and clear roadmap for expanding Buildstash into this exciting market.”

“That it's important to be in Japan, to be making personal connections and to keep those connections active. There are a lot of opportunities if you pursue them, but not if you don't! They won't come to you, but they're open to business and collaboration.”

“We now have a solid understanding of this market potential and the relevant market entry levels, market dynamics and pricing. Key takeaways – that Japan is open for business from Scotland, high level of perfectionism and significant opportunity.” (A new-to market spirits company)

“The trade mission helped making new customers to sign the contract, pushing existing customers to increase the purchasing volume, and getting contacts to the new prospective customers.”

“We gained a deeper understanding of Japanese consumer preferences. This insight will help us tailor our product positioning and messaging for the Japanese market. Secondly, we saw first -hand the importance of long -term relationship building in doing business in Japan”

“The meetings we had and contacts made were of a relevance and seniority that will assist us in continuing to build on the very strong relations between Scotland and Japan.”

“Participation in the Osaka Expo and the wider trade mission programme has been highly beneficial for our company. It provided a unique platform to showcase our capabilities to a diverse international audience and allowed us to gain visibility within the Japanese market.”

“Overall, the experience has strengthened our strategic positioning in the region and laid a strong foundation for future growth and partnerships.”

Section 12: Annex Section Header

The following Annexes are available in the supporting documents of this publication:

- Gaming Activation Programme
- Consumer Industries Programme
- Health Technologies Programme
- Offshore Wind & Renewables Programme
- Images of Scotland at Expo



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