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UK KOSHER FOOD MARKET BRIEF

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Although small, the UK Kosher food market presents opportunities for U.S. products. The best market opportunities lie in servicing the Jewish communities at a local level with quality, shelf-stable products. British consumers are following the established consumer trends toward convenience products, healthy alternative, and organic products. USDA believes they would like to buy exciting, great tasting U.S. kosher products.

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SECTION I. MARKET OVERVIEW

According to the most recent figures from the UK Board of Deputies, in 1995 the UK Jewish community comprised 285,000 people. Trade sources indicate that the trend in the Jewish population is likely to have fallen below 250,000.

Jews in the United Kingdom live mainly in the London area. In the past decade, Jewish communities in Manchester, Leeds, Glasgow, Brighton, Birmingham, Liverpool and Southend have declined. London and the Home Counties now account for 72 percent of UK Jewry.

The largest market for US product lies predominately in the Northern London/Hertfordshire area. The Jewish communities have gradually moved from their traditional London East End district of Ilford to Golders Green, Finchley, Hendon, Kenton, Edgware, Stanmore, Bushey, Borehamwood, and Radlett.

There are over 2 million Muslim consumers in the UK -- a community that is growing. Trade sources think that some Muslims may find it acceptable to consume Kosher foods. At this time, there is no information to ascertain what percentage may accept kosher food. Trade sources report that UK vegetarians look for kosher food as they know that they can trust the "parve" labeling to guarantee no meat or dairy content. Vegetarians are growing in numbers in the UK. According to a 1997 Realat Gallup Survey, there are now more than 3 million vegetarians in the UK. This figure constitutes a dramatic 20-percent increase over a poll conducted in 1995.

Still, the actual size of the existing market is small and growth is relatively slow. In the short term, U.S. companies will find it difficult to sell large volumes of product without undertaking considerable consumer education. The UK general population is not familiar with various kosher certification symbols. This can be addressed by an aggressive marketing strategy.

As for market entry, most opportunities lie in servicing the Jewish communities at a local level with quality shelf-stable products. UK kosher consumers are following the established UK consumer trends towards convenience products, healthy alternatives, organic products etc. and would like to buy exciting, great tasting Kosher products. This represents opportunities for snack foods, cookies, sauces, dips, breakfast cereals, soft drinks, and other ambient grocery items which would appeal to a sophisticated consumer. There is also a market for Kosher wines, particularly for mainstream grape varietals which are showing much more growth than the sweet dessert wines.

Opportunities also exist for US products to be "made to order", designed to specifications. Some Israeli manufacturers are already doing this.

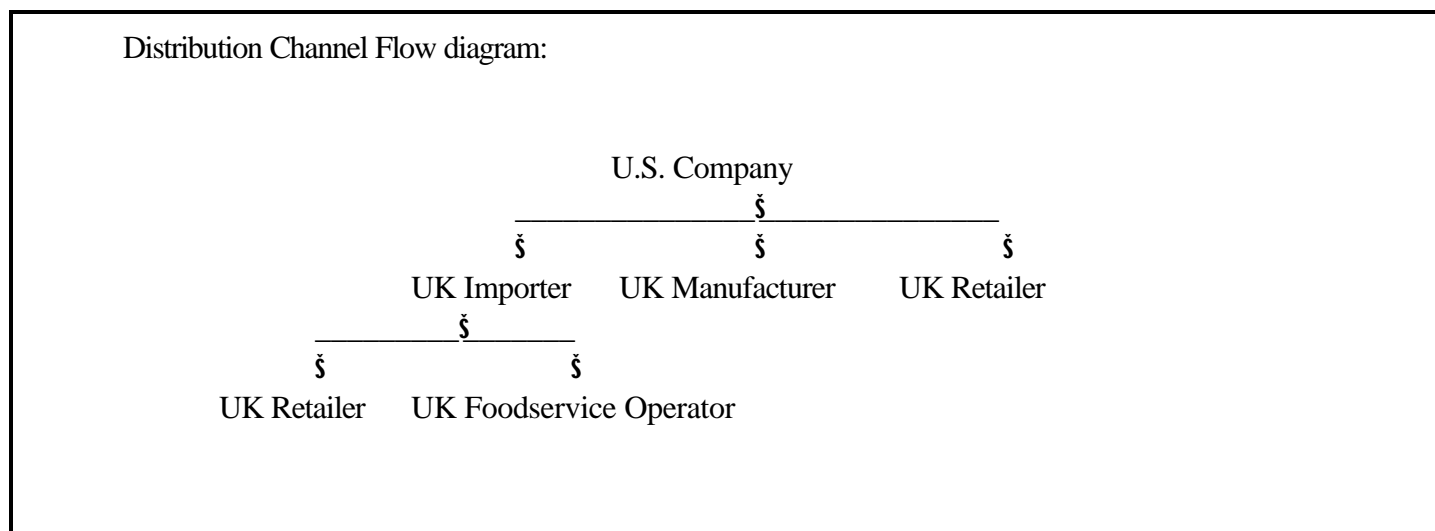
All U.S. kosher certification symbols are accepted in the United Kingdom, with the Union of Orthodox Jewish Congregations of America (OU) symbol being the most familiar to UK consumers. Certification acceptance may vary with the individual consumer.

There are several points to consider concerning this market:

Advantages	Challenges
US products that are not already available as kosher-supervised in the UK can be of special interest	Small size of market
UK food manufacturing base is small, so domestic prices tend to be high. Efficient U.S. producers may be price competitive.	UK import regulations, import duties and quotas, particularly on meat, poultry & dairy may offset a U.S. price advantage
Trade sources show that overall, UK consumers prefer taste of U.S. products to Israeli products	Public concern and UK labeling regulations as pertains to Genetically Modified Organisms

SECTION II. MARKET SECTORS

The following graphic illustrates the distribution system for food products:



Retail Sector

The majority of Kosher products sold at retail level are sold through independent stores located in the heart of the Jewish community. These stores obtain their product from UK manufacturers, UK importers, or directly from the US or competitor country.

The remaining kosher retail sales are through the large UK multiple supermarkets. These are a considerable force in mainstream UK retailing with the top ten chains accounting for around 70 percent of all UK retail grocery sales. All UK retail chains will have a number of stores which have a Kosher food fixture. To illustrate, the UK's largest retailer - Tesco has 650 stores, of these, around 25 have Kosher fixtures. The location of stores which will have Kosher lines is determined by the demand from any local Jewish population.

All UK retailers see an increase in sales of their Kosher products during the four main Jewish festivals, but particularly Passover. As a result, retailers purchase special products, even substituting these for normal lines, during this time. Passover may represent an opportunity to test-market a particular US product so as to obtain a permanent listing.

Example Retail Prices, as taken from a Waitrose supermarket September 6, 1999.

<u>Product</u>	<u>Weight</u>	<u>Price in British Pounds</u>
Dry Soup Mix	150g	0.89
Canned Soup	400g	0.56
Shredded Beets	946ml	1.75
Stock cubes	45g	0.43
Pickled Cucumber	560g	1.19
Matzo Ball Mix	84g	0.89
Falafel Mix	90g	0.68
Farina Potato Flour	500g	1.09
Sesame Halva Vanilla	100g	0.45
Egg Noodles	250g	0.96
Macaroni	250g	0.86
Toasted Coucous	250g	0.96
Toasted Farfels	250g	0.96
Tomato Soup	396g	0.59
Matzo Crackers	150g	0.72
Tomato Paste	100g	0.37
Plain Cookies	200g	0.79
Sesame Crackers	250g	0.88
Wheaten Matzos	150g	0.75
Fine Matzo Meal	375g	0.99

For further information see list of independent UK Kosher retail stores in the contact list below. A report giving more information on the UK retail trade is available. Currently a listing of UK supermarket chains can be found at www.fas.usda.gov in the UK Market Information Report of August 1998. The London Beth Din web site lists its certified delicatessens and "take aways" or carry outs, in London area - www.kosher.org.uk

Hotel and Restaurant Industry (HRI)/Food Service Sector

There is a small market for Kosher meals in all branches of UK foodservice. For most mainstream operators, preparing kosher products on-site is not cost-effective. Generally, kosher meals are bought in frozen from specialized suppliers, or a "non-offensive acceptable meal" is provided, such as a vegetarian dish.

Frozen meals provided by licensed suppliers are usually in specialized protective plastic or foil containers. They are labeled, taped with tamper-proof seals and coded with kosher licence details which meet kosher, food hygiene and labeling regulations. These meals are supplied to hospitals, schools, restaurants and hotels for functions with kosher-observant guests.

There are around 15-20 Kosher restaurants in the UK, with the majority located in London. To date, kosher food has not attracted the interest shown in other cuisines. This is thought to be attributable to its specialized nature and associated added costs to the consumer.

Opportunities for US foodservice products and food ingredients for catering can be found through contact with the specialist kosher foodservice manufacturers shown in the HRI/Foodservice list below and through contact with the UK Kosher restaurants.

Further information is available in the list of major UK kosher caterers. A Market Brief that covers the mainstream UK Foodservice Market is available from the Internet web site: www.fas.usda.gov
Check under Attache Reports.

The London Beth Din web site lists its certified caterers, hotels and restaurants in London area at www.kosher.org.uk

Food Processing Sector

The UK has a number of Kosher food manufacturers, a list of which is provided below. This section also gives an indication of the products each company manufactures. There are also opportunities for U.S. companies to supply food ingredients to local producers of consumer-ready foods. Further information is available from the London Beth Din web site, which lists its certified manufacturing establishments in the London area. www.kosher.org.uk

SECTION III. KEY CONTACTS**A. UK Kosher Contacts**

The London Beth Din
Court of the Chief Rabbi
Kasrut Division
735 High Road
London N12 0US
Tel: +44 20 8343 6255
Fax: +44 20 8343 6254
Email: info@kosher.org.uk
Web site: www.kosher.org.uk

Kedassia, The Joint Kashrus Committee of England
67 Amhurst Park
London N16
Tel: +44 20 8802 6226/7 also +44 20 8800 6833
Fax: +44 20 8809 7092

Manchester Beth Din
435 Cheetam Hill Road
Manchester M8
Tel: +44 1262 740 9711

Board of Deputies of British Jews
Commonwealth House
1 New Oxford Street
London WC1
Tel: +44 20 7543 5423/0010

Federation of Synagogues
65 Watford Way
London
NW5 3AQ
Tel: +44 20 8202 2263
Fax: +44 20 8203 0610

B. UK Importers**Importers from US:**

A. Poortman (London) Ltd., Prescott House, Prescott Street, London, E1 8BB
Tel: 0171 481 2110 Fax: 0171 702 1513
Managing Director: Mr. A. Jacobs.
Products: Dried Beans, Lentils, Natural Foods, Spices, Herbs, Ethnic Food.
Business Type: Importers, Merchants

Eliko Food Distributors Ltd, Unit 1, 12/48 Northumberland Park, London N17 0TX
Tel: +44 20 8801 9977 Fax: +44 20 8365 1104
Contact: Mr. E. Kohn
Currently import kosher food products from various US companies. Other lines in their portfolio are frozen foods, wines and baby foods.

Foundation Food Co Ltd, Chantry Place, Headstone Lane, Harrow, Middlesex HA3 6NY
Tel: +44 20 8420 1010 Fax: +44 20 8420 1691
Contact: Mr. Douglas Specter

When permissible trades in kosher frozen poultry, also imports frozen pizzas.

Snowcrest Ltd, Snowcrest House, 1-7 Garman Road, London N17 0UN

Tel: +44 20 8365 0000 Fax: +44 20 8808 9789

Contact: Mr. E. Maghnagi

When permissible trades in kosher frozen and cooked whole turkey and chicken parts. Also, in prepared meals and low fat frankfurters.

Tofutti UK Ltd, 5th Floor, Congress House, Harrow, Middlesex HA1 2FD

Tel: +44 8861 4443 Fax: +44 8861 0444

Contact: Mr. Shailesh Patel

Imports a range of non-dairy premium frozen desserts, instant soups, and a full range of kosher products from a variety of US companies.

Trustin Unimerchants, Lancaster Way Business Park, Ely, Cambridgeshire CB6 3NP

Tel: +44 1353 660560 Fax: +44 1353 660539

Contact: Mr. David Roberts

Importers from other than US

Agrexco Agricultural Export Co. Ltd, Carmel House, Clayton Road, Hayes, Middlesex, UB3 1AX

Tel: 0181 848 7788 Fax: 0181 848 1106

General Manager: Mr. G. Locker

Products: Fruits & Vegetables

Business Type: Importers from Israel

Carmel Food Ltd, 81 Mile End Road, London E1 4UJ

Tel: 0171 790 5904 Fax: 0171 790 5905

Managing Director: Dr. G. Berger

Products: Kosher Wines & Spirits, Kosher Foods.

Business Type: Importers

Drumsticks Products Co., 5 Paget Road, London N16 5ND

Tel: 0181 800 6261 Fax: 0181 809 1749

Managing Director: Mr. R. Spitzer

Products: Kosher Foods

Business Type: Importers

Nathan Frost Ltd, Unit 12 Millhead Industrial Estate, Millmead Road, Tottenham, London N17 9QU

Tel: 0181 808 4106 Fax: 0181 801 4601

Managing Director: Mr. D. Frost

Products: Gherkins, Tomato Puree, Halva. Herrings, Olives, Onions, Capers, Beans & Pulses, CousCous.

Business Type: Importers, Wholesalers

Honeywill & Stein Ltd., Times House, Throwley Way, Sutton, Surrey, SM1 4AF
Tel: 0181 770 7090 Fax: 0181 770 7295
Managing Director: Mr. M.E. Perkins
Products: Food Supplements & Flavors.
Business Type: Importers, Distributors

Kippax Biscuits, King Street Bakery, King Street, Colne, Lancashire BB8 9HU
Tel: 01282 864 198 Fax: 01282 868 891
Managing Director: Mr.R. Farnell
Products: Kosher Biscuits.
Business Type: Importers, Manufacturers

M&B (Specialised) Confectioners Ltd, 3A Millmead Industrial Estate, Millmead Road, London N17 9ND
Tel: 0181 801 7948 Fax: 0181 801 4663
Managing Director: Mr.G.W. Scott
Products: Kosher Glycerine.
Business Type: Importers, Distributors

Meca Foods Ltd., Unit 1, Europa Building, Bethune Road, London NW10 6ND
Tel: 0181 963 1038 Fax: 0181 963 1037
Managing Director: Mr. Sadi
Products: Middle Eastern Foods
Business Type: Importers, Distributors

Rumplers Confectionery, Unit 14, 38-40 Upper Clapton Road, London E5 8BQ
Tel: 0181 806 7065 Fax: 0181 806 3845
Managing Director: Mr. E. Rumpler
Products: Strictly Kosher Confectionery & Biscuits, General Kosher Foods.
Business Type: Importers, Distributors

C. UK Retail outlets

Also see London Beth Din list on web site: www.kosher.org.uk

Raj Superstore
7 Russell Parade
Golders Green Road
London NW11 9NN
Tel: +44 20 8455 0134
Contact: Dr. Raj Kadiwar

Contact: Mr. Chandresh Patel

A Country Market
136-144 Golders Green Road
London NW11
Tel: +44 20 8455 3289

Kosher King
223 Golders Green Road
London NW11
Tel: +44 20 8455 1429

Kosher Paradise
10 Ashbourne Parade

London W11
Tel: +44 20 8455 2454

Leeds LS17 6PY
Tel: +44 113 268 0473
Contact: Mr. Peter Myers/Mr. Malcolm Sorkin

Myers Famous Kosher
410 Harrogate Road

D. UK HRI/Foodservice Contacts

Hermolis (London)
Abbeydale Road
Wembley
Middlesex HA10 1AY
Tel: +44 20 8810 4321 Fax: +44 20 8810 4331
Contact: Mr. M. Lissner

M&G Caterer Contracts Ltd
13 Leylands Road
Leeds LS2 7QR
Tel: +44 113 293 5120
Fax: +44 113 293 0701
Contact: Mr. Michael Goldberg/Mr. David Myers

Tony Page Caterers
6 Chapmans Park
378 High Road
London
NW10 2DY
Tel: +44 20 8830 4000 Fax: +44 20 8830 2000
Contact : Mr. Tony Page

Kosher Cuisine
Unit C, Colindale Business Park
Carlisle Road
London NW9
Tel: +44 20 8200 5060

E. UK Kosher Manufacturers

P. Aranovitch & Sons Ltd., 2 Tapley Place, Edge Lane, Liverpool, Merseyside, L13 1AP
Tel: 0151 228 6186
Sales Manager: Mr. N. Wolfson
Products: Kosher Cooked Meats, Wurst, Salami, Saveloys, Cocktail Viennas, Pickled Beef and Brisket.
Business Type: Manufacturers

Ashley Chase Estate, The Estate Office, Parks Farm, Litton Cheney, Dorchester, Dorset, DT2 9AZ
Tel: 01308 482 580 Fax: 01308 482 608
Managing Director: Mr. C. Littman
Products: Gruyere Kosher Cheese and other cheeses.
Business Type: Manufacturers

Better Tasting Snack Foods Plc., Units 8-12, Bridge Street Industrial Estate, Uttoxeter, Staffordshire, ST14 8ST
Tel: 01889 567 338 Fax: 01889 562 701
Products: Vegetable Crisps & Kosher Products
Business Type: Manufacturers

Broom Lane Enterprises, Quality House, 73 Windsor Road, Prestwick, Greater Manchester, M25 0DB

Tel: 0161 721 4418 Fax: 0161 740 4186
Managing Director: Mr. M. Leitner
Products: Chocolate, Kosher Foods, Potato Snacks.
Business Type: Manufacturers

Coffee Gourmet Ltd., P.O. Box 52, 30 Holden Road, Broughton Park, Salford, Greater Manchester, M7 4PT
Tel: 0161 792 9668 Fax: 0161 708 9799
Chairman: Ms. H. Orenstein
Products: Chocolate, Cocoa, Coffee, Confectionery, Flavors, Teas, Vanilla Beans, Waffles & Syrups.
Business Type: Distributors, Manufacturers

J. Grodzinski & Daughters Ltd., 170 Clapton Common, London E5 9AG
Tel: 0181 802 4166 Fax: 0181 880 1980
Managing Director: Mr. J. Grodzinski
Products: Kosher Foods & Bakery Products.
Business Type: Manufacturers

J.A. Hyman, 123-129 Waterloo Road, Manchester, M8 8BT
Tel: 0161 792 1888 Fax: 0161 792 7670
Managing Director: Mr.S. Hyman
Products: Kosher Fish Products & Smoked Salmon. Distribution of Kosher Raw & Cooked Meats, French Kosher Dairy Products.
Business Type: Distributors, Manufacturers

Macrae Foods, 66 St. Peter Street, Petershead, Aberdeenshire, AB42 1QB
Tel: 01779 472 115 Fax: 01779 474 215
Managing Director: Mr. R. Porteous
Products: Marinated Herring & Peeled Onions
Business Type: Manufacturers

Overseal Foods Ltd, Swains Park, Park Road, Overseal, Swadlincote, Derbyshire, DE12 6JX
Tel: 01283 224 221 Fax: 01283 222 006
Managing Director: Mr. J.R. Handley
Products: Natural Colours for food products and Kosher Foods.
Business Type: Manufacturers, Suppliers

W. Simons & Son, 389 Burnt Oak Broadway, Edgware, London, HA8 5TX
Tel: 0181 905 6611 Fax: 0181 905 6622
Managing Director: Mr. R. Simmons
Products: Israeli & Kosher Foods
Business Type: Manufacturers, Packers

Sova Foods Ltd., 1 Garnham Street, London N16 7JA
Tel: 0171 249 0862 Fax: 0171 502 0272
Managing Director: Mr. H. Greenberg
Products: Pasta, Peanut Butter, Jam.
Business Type: Distributors, Manufacturers

Tropical Foods Ltd., 7 Stafford Road, Birmingham, W. Midlands, B21 9DT
Tel: 0121 554 4343 Fax: 0121 554 4343
Managing Director: Mr.B.S. Bhandal
Products: Continental Foods.
Business Type: Distributors

F. Local UK government organisations

(see also the UK Food and Agricultural Import Regulations and Standards (FAIRS) Report #UK9036)

Ministry of Agriculture, Fisheries & Food (MAFF)
Ergon House, c/o Nobel House
17 Smith Square, London SW1P 3HX
Tel: 011 44 207 238 6000
Fax: 011 44 207 238 6591
E-MAIL: helpline@inf.maff.gov.uk
Website: www.maff.gov.uk

Ministry of Agriculture, Fisheries and Food
Veterinary Services Division
Hook Rise South
Tolworth, Surbiton
Surrey KT6 7NF
Tel: 011 44 20 330 4411
Fax: 011 44 20 8337 3640

HM Customs & Excise
Portcullis House
27 Victoria Avenue
Southend on Sea
Essex SS2 6AL
Tel: +44 1702 366077
Fax: +44 1702 367342
Web site: www.hmce.gov.uk