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**Prepared By:** Julie Vasquez-Nicholson

**Approved By:** Wang Yao

**Report Highlights:**

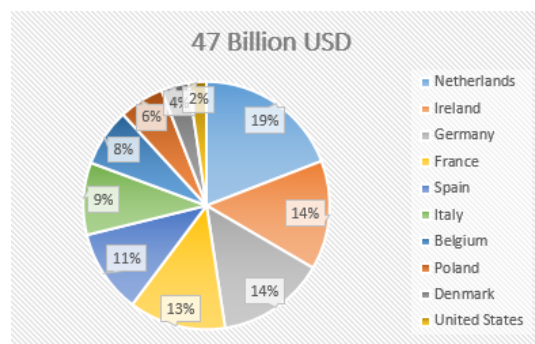
The United Kingdom has strong social and cultural ties to the United States, demonstrated by the similarities in consumer trends in the retail and foodservice markets. The UK presents strong market opportunities for many U.S. consumer-orientated products, including specialty food products, “healthy” food items, wine, sauces, fruit, nuts, and juices. “Health” and convenience foods are the main driving forces in the UK value-added food and beverage market. Consumers in this country are looking for variety in high quality food products, especially those perceived to have health benefits. Over the past 10 months, the UK grocery and foodservice markets have changed dramatically and possibly forever. Grocery retailers have benefited while the foodservice sector has been decimated. Meanwhile, online grocery shopping has gained its biggest market share ever.

## Market Fact Sheet: United Kingdom

### Executive Summary:

The United Kingdom (UK), a leading trading power and financial center, is the third largest economy in Europe. Agriculture is intensive, highly mechanized, and efficient by European standards but, represents less than one percent of the Gross Domestic Product (GDP). While UK agriculture produces about 60 percent of the country's food needs with less than two percent of the labor force, the UK is heavily reliant on imports to meet the varied demands of the UK consumer who expects year-round availability of all food products. The UK is very receptive to goods and services from the United States. With its \$2.92 trillion GDP in 2019, the UK is the United States' largest European market and fifth largest in the world for all goods. Consumer-oriented products remain the most important sector for U.S. agriculture, amounting to \$978 million in 2019. Demand for U.S. consumer-oriented food products continues to differentiate the UK from many of its European neighbors. The UK is the 13th largest market in the world for U.S. agricultural products.

### Consumer-Oriented Imports in 2019



### Food Processing Industry:

The food and drink sector is the largest single employer in the UK manufacturing sector. Food and drink is also the largest manufacturing industry in the UK, with an annual turnover in 2019 of \$126 billion. Around 430,000 people across the UK are employed in jobs associated with food and drink manufacture and sales.

### Food Retail Industry:

The food retail sector is saturated, highly consolidated, and competitive. The top five retail groups (see chart) together account for 74 percent of

the market. Independent stores continue to face strong competition from modern grocery retailers. Online food sales are showing tremendous growth, with the sector being valued at \$15.2 billion (£12.7 billion) in 2019. UK consumers are willing to try foods from other countries but expect quality products at a competitive price.

**Population:** 66.7 million (2019 est.)

**GDP:** \$2.92 trillion

**GDP/Capita:** \$44,300 (2017 est.)

### Top Ten Growth Food Products

- 1) Prepared Food
- 2) Fresh vegetables
- 3) Chocolate and cocoa products
- 4) Condiments and sauces
- 5) Tree nuts
- 6) Wine and beer
- 7) Distilled Spirits
- 8) Processed fruits and vegetables
- 9) Soybeans
- 10) Snack foods (excludes nuts)

### Food Industry by Channels

Consumer-Oriented Imports	\$47 billion
Food Processing Industry	\$126 billion
Food Retail	\$261 billion

### Top Ten Food Retailers

1. Tesco
2. Sainsbury's
3. Asda
4. Morrison's
5. Aldi
6. Cooperatives
7. Lidl
8. Waitrose
9. Iceland
10. Marks & Spencer

Strength	Weakness
UK is one of the biggest markets in Europe with one of the highest per capita income globally	U.S. products face competition from tariff-free products from the EU and FTA partners.
Opportunity	Challenge
Common language and the potential FTA make the UK an attractive market.	UK's strict animal welfare standards create barriers for animal origin products.

Data sources include: Global Agricultural Trade System, Global Trade Atlas, The World Factbook, The World Bank. For additional information, contact [aglondon@fas.usda.gov](mailto:aglondon@fas.usda.gov).

The United Kingdom (England, Wales, Scotland and Northern Ireland), a leading trading power and financial center, is the third largest economy in Europe, after Germany and France. Services, particularly banking, insurance, and business services, account for the largest proportion of Gross Domestic Product (GDP) while overall manufacturing continues to decline in importance. Agriculture is intensive, highly mechanized and efficient by European standards but, in terms of gross added value, represents less than one percent of GDP. While UK agriculture produces about 60 percent of the country's food needs with less than two percent of the labor force, the UK is heavily reliant on imports to meet the varied demands of the UK consumer who also expect year-round availability of all food products.

The UK is very receptive to goods and services from the United States. With its \$2.92 trillion GDP, the UK is the United States' top European market and the fifth largest market worldwide for all goods after Canada, Mexico, China and Japan. In 2019, the United States exported \$60.5 billion of industrial and agricultural goods to the UK. U.S. agricultural, fish, and forestry exports to the UK reached \$2.81 billion in 2019. Consumer-oriented food and beverage products remain the most important UK market sector for U.S. agriculture, amounting to \$970 million. Wood pellet exports for renewable energy remains strong, driving U.S. forest product exports to the UK to \$934 million in 2019. Demand for U.S. consumer-oriented food products continues to differentiate the UK from many of its European neighbors. The UK is the 13th largest market in the world for U.S. agricultural products.

### **COVID-19**

Over the past 10 months, Covid-19 has brought devastation to the food service sector but gains for grocery retailers. Two groups of people have formed out of this crisis: those who lost their jobs, with the associated worries, and those who kept their jobs, spending more time at home with their families and having greater disposable income. Shopping and socializing habits have changed. Changes include consumers reverting to one large shop per week, choosing only one retailer, and experiencing online grocery shopping for the first time for many consumers. On the foodservice side, consumers can purchase takeaway wine and beer and even takeaway pub lunches for the first time.

### **Grocery Retailers:**

The UK grocery market benefited hugely from increased sales with most of the population spending more time at home. Take-home grocery sales grew at the fastest rate since records began in 1994. Shoppers are moving a greater proportion of their eating and drinking back into the home, as a direct response to Covid-19. Online grocery shopping has increased year on year, accounting for 11.5 percent of all grocery sales now as a result of Covid restrictions. Online grocery shopping gained more ground and attracted more new shoppers in 2020 than it has in the previous five years combined. One in five households now orders groceries online. There has also been a switch in purchasing behavior with many preferring to shop local. This has led to an increase in sales at independent supermarkets by 63 percent with the sector reaching a market share of 2.5 percent - the biggest share since 2009. This is great news for U.S. products, as many mainstream grocery lines such as confectionery, cereals, and baking mixes are sold in independent stores.

### **Foodservice Market:**

The success of the grocery retail market has been at the detriment of the foodservice industry, which this time last year was the UK's fourth largest employer. With pubs and restaurants forced to close for months, the sector has been decimated. When allowed to open, they have had to abide by government restrictions such as reduced opening hours and limits on capacity. Changes in consumer behavior due to

Covid-19 will have long-term effects on the drinks and hospitality industries, resulting in a “new different” rather than a “new normal.”. Consumer reaction to not being able to socialize in the usual ways has been polarizing. The impact has had a knock-on effect on suppliers. Drink suppliers have had to find new distribution channels and rethink how they build their brands and engage with consumers. The beer industry has pivoted to selling beer directly to consumers. Online wine sales have also rocketed.

### **Current Situation:**

At the writing of this report, the UK finished its second lockdown on December 1. From December 2, 2020, a new tier system came into force with the country divided into three bands: medium, high, and very high. Most of the country falls into the high category. Shops, restaurants and bars reopened but need to abide by specific rules depending on their tier. Alcohol can only be served alongside a substantial meal. They also need to abide by reduced opening hours and restrictions on meeting people outside one’s bubble. As of December 20, with the rise in new cases in London and the Southeast of the UK, and many of those cases having a new virus strain, the rules were tightened even further. A new tier 4 was created for these affected areas and only essential shops are open and meeting people outside your household was restricted even further. The grocery retail sector will see increased sales with more people spending the holiday season at home. With many places being shut and people wanting to cheer themselves up, it is expected that consumers will indulge and spend more than they ordinarily would.

### **BREXIT:**

Brexit will bring opportunities for food and agricultural exports from the United States to Great Britain (GB) - England, Wales and Scotland - when it departs the European Union’s single market and customs union on December 31, 2020. Northern Ireland will remain within the EU system to avoid disruption to trade with the Republic of Ireland. GB’s new status will mean increased documentary checks, and so increased costs, on trade from the EU to GB. The United States is also currently negotiating a trade deal with the UK, which has the scope to further smooth trade between the two nations once an agreement is reached.

### **UK Demographics:**

In June 2019, according to the UK Office for National Statistics (ONS), the population of the United Kingdom was estimated at 66.7 million, up 316,000 from the previous year. It is projected to reach 73 million by 2041. According to 2019 data, the South East of England is home to some 9.18 million residents (13.7 percent of the population), followed by London, which has 8.9 million people (13.3 percent of the population). Over a quarter of the UK population live in London and in the South East of the country. These two regions cover less than one tenth of the UK’s land area. The North West (Manchester, Liverpool etc.) has the third largest population with 7.34 million residents (11 percent of the population). In 2019, 87.2 percent of the UK population was listed as white with 12.8 percent (about 8 million people) belonging to mixed, non-white, and other ethnic groups. There are many ethnic groups in the UK including large populations from Asia, Caribbean, and Africa. The UK has a wide variety of ethnic restaurants particularly in London and other major cities in the country.

## Key Influences on UK Consumer Demands

- **Slow population growth**
- **Aging population** - (11.9 million aged over 65 – 18 percent of population and 1.6 million over 85 years old – 2.4 percent of population)
- **Number of household units growing** – (27.6 million in 2019 and 19.2 million families).
- **Smaller households** (notably one-person households)
- **Growing personal disposable income** (boosting premium/convenience/eating out)
- **Rise in number of working women** (46 percent of total workforce)
- **International consumer tastes** e.g., Chinese, Indian, Italian, Thai, Mexican
- **Reduction in formal meal occasions**, leading to an increase in “snacking” and “grazing”
- **Increasing public debate centered on food**, incorporating safety, environmental, ethical (animal welfare), social and economic issues
- **Improvements in efficiency across the supply chain**, reducing the real cost of food
- **Increased retail concentration** (supermarkets growth vs. independent retailers)
- **More population living in urban areas than rural areas**

**Table 1: Advantages and Challenges**

Advantages	Challenges
Market dominated by a few retailers with strong market penetration. Sophisticated replenishment systems mean U.S. products can be widely distributed.	Supermarket chains demand significant volume and their concentration can make market access difficult initially. Trial listings must give results in a short time or product will be de-listed.
There are many specialty importers, capable and interested in importing from the United States.	The UK has well established brands for mainstream products. Brand-building and marketing costs are substantial.
U.S. products are viewed by UK consumers as affordable.	U.S foods are perceived as being high volume, low standards while U.S. agriculture has regular negative portrayal in the UK media.
The country is English speaking and is therefore an easier gateway into the rest of Europe for U.S. exporters.	From January 1, 2021, the UK will depart the single market and customs union, increasing transaction costs (e.g. document checks and paperwork) on imports from the EU. This will increase the competitiveness of U.S. food and agricultural products versus EU origin product in the UK.
The United States is a popular destination for UK tourists and familiarity with U.S. products is widespread.	Popularity of specialty products from many EU countries is high, e.g. French cheeses, Spanish citrus and Italian pasta.

## II. EXPORTER BUSINESS TIPS

**Essential UK Market Considerations:** When looking at the UK market, consider the following factors: Basic market research, market sector - retail, foodservice or processing, UK business partner and terms, import duty and excise tax, UK value added tax, price points and competitors, labeling, EU food standards restrictions, UK animal welfare standards, and promotion budget and resources.

### General Consumer Tastes and Preferences

- **Food Safety:** As a result of food scares over the past two decades, the UK food supply chain is now heavily scrutinized, meaning that UK retailers, foodservice operators and manufacturers are uncompromising on traceability and quality assurance. UK buyers often require technical specifications above the level mandated by government legislation.
- **Animal Welfare and Sustainability:** Largely driven by the news agenda, U.S. food and agriculture is perceived as having lower animal welfare and environmental standards than their British counterparts. Several supermarket chains, including up-scale supermarket chain Waitrose, has pledged to “never stock chlorinated chicken” even if a U.S.-UK trade deal is reached. During the lockdown, confidence in U.S. agriculture dipped considerably as consumers looked to buy British.
- **Biotech (GE):** Biotech products or products that contain biotech ingredients can only be sold in the EU if the genetically engineered (GE) trait has been given approval. The onus is on the UK importer to ask the necessary questions of the U.S. exporter whether the product contains biotech ingredients. Products with biotech ingredients that are EU approved, require appropriate labelling, i.e., a positive statement of GE presence in the food product. (See: [https://ec.europa.eu/food/plant/gmo/traceability\\_labelling](https://ec.europa.eu/food/plant/gmo/traceability_labelling). Food products containing biotech-derived ingredients in the UK are minimal. Large supermarket chains have generally determined that they will not stock products with biotech ingredients in their private label products (typically these, account for 45-50 percent of supermarket lines). Many large companies with a presence in the UK/EU have also taken a non-GE approach, as well as many restaurants and cafes.
- **Organic:** Sales of organic food and drink have increased in the last several years with sales in 2019 reaching a record \$3.5bn (£2.5bn), an increase of 4.5 percent over the previous year. Supermarket sales have grown by 2.5 percent, independent retailers by 6.5 percent, home delivery by 11.2 percent, and organic sales with foodservice by 8.3 percent. Despite another positive year for organic produce, sales fell 2.4 percent in 2019, partly due to unsustainable low prices in non-organic produce. However, with the onset of Covid-19, sales have again increased. Many chains like McDonald’s, Nando’s and Pret-A-Manger include organic items on their menus. Organic products that have had increased success include baby food, milk, vegetable and seed oils and non-food products such as textiles and health and beauty products. Young consumers and families choosing to pay more for organic products have pushed sales up. The organic market, though, is still dwarfed by the size of the overall food and drink sector, worth \$39.2 billion. Searches for the organic box scheme increased by 174 percent in a year. Sales in organic wine had the biggest increase (50 percent).
- **Health:** Consumers are looking for food to improve their health which is driving sales of premium, less processed food, functional food, fresh fruit, fruit juices and low-fat or low sugar processed food. Sales of vegetarian and plant-based products have increased significantly with those aged over 55 being the biggest buyers.

### III. IMPORT FOOD STANDARDS & REGULATIONS AND IMPORT PROCEDURES

#### Food Standards and Regulations

With the UK officially leaving the EU on January 31, 2020, the UK has rolled over all EU labeling law and will therefore continue to follow EU policies regarding labeling and ingredient requirements. The one main difference is that any products for sale in UK retailers will need to have a UK importer address on the packaging and not one that is based in Europe. The EU Food and Agricultural Import Regulations & Standards Country Report ([FAIRS](#)) specifically addresses labeling and ingredient requirements. It is available through the FAS reporting website or by emailing [aglondon@fas.usda.gov](mailto:aglondon@fas.usda.gov)

#### General Import and Inspection Procedures

Her Majesty's Revenue & Customs (HMRC) is responsible for the clearance of all goods entering the UK, for further information and customs forms please go to [www.hmrc.gov.uk](http://www.hmrc.gov.uk) .

### IV. MARKET SECTOR STRUCTURE AND TRENDS

#### Products in the market that have good sales potential

- Processed products – health food, mainstream grocery, snack foods etc.
- Dried and Processed Fruit: Cranberries, dried cherries, prunes, raisins, wild berries
- Nuts: Almonds, peanuts, pecans, pistachios, walnuts
- Fish and Seafood: Cod, pollock, salmon, scallops & other fish products
- Fresh Fruit and Vegetables: Apples, grapefruit, pears, sweet potatoes, table grapes
- Meat: Hormone-free beef and pork products
- Drinks: Craft beer, spirits, wine
- Food Ingredients

#### Products not present because they face significant boundaries

- Food additives not approved by the European Commission
- Red meat and meat products produced with growth promotants
- Most poultry and eggs
- Biotech-derived products that are not approved in the EU

The UK food and grocery market is set to grow by 10 percent to \$295 billion between 2019 and 2022, according to the Institute of Grocery Distribution (IGD). Other key statistics include:

- In 2019, UK households spent 16 percent of their annual budgets on food and non-alcoholic drinks. Another 2.9 percent was spent on alcohol (ONS). Food and grocery is the third largest area of expenditure after housing and transport.
- The average UK household spends \$4,513 (£3,224) on groceries and \$2,213 (£1,581) on eating out every year. (ONS).
- Four in five shoppers have visited a discounter for grocery shopping in the past month (IGD).
- One in four consumers now buy groceries online at least once a week, while 75 percent of consumers have ordered food groceries online. (Waitrose Report).
- Nine in ten people visit a convenience store on a regular basis to buy grocery necessities.
- Online shopping will represent a greater share of the overall spending, accounting for nearly nine percent spent on groceries in 2022. (IGD).

## Retail Sector

**Supermarket Chains** - Four supermarket chains dominate UK food retailing, accounting for 67 percent of the market. Tesco is the market leader, with 27 percent market share, followed by Sainsbury's with 15.3 percent, Asda with 14.4 percent, and Morrison's has 10.2 percent. Other UK supermarket chains include Aldi, The Cooperative, Waitrose, Lidl, Iceland, and Marks and Spencer.

### Market Shares of the UK's Supermarket Chains

Retailer	Market Share %	Retailer	Market Share %
Tesco	27.0	Lidl	6.1
Sainsbury's	15.3	Waitrose	5.1
Asda	14.4	Iceland	2.3
Morrison's	10.2	Others	1.9
Aldi	7.8	Symbols/Independents	1.9
Cooperative	6.4	Ocado	1.7

Source: Kantar Worldpanel, market share summary, November 1, 2020.

\*These market shares are updated monthly, so there can be a slight change month to month.

**Discounters** - The discounters Aldi and Lidl continue to gain market share. With a combined market share of 13.9 percent of the British grocery market. Aldi plans to create another 4,000 jobs with the opening of 100 new stores and a new online ordering service as part of a \$1.82 billion (£1.3bn) investment drive in the UK. The new jobs are on top of 3,000 permanent roles the discount supermarket chain created this year after grocery sales surged during the coronavirus pandemic.

In general, each chain focuses on a specific market segment. For example, Tesco targets the middle market, providing both economy and up-scale products. Sainsbury's is pitched slightly up-market of Tesco, with Asda/Walmart slightly down-market. Morrison's and the Cooperative both compete at much the same level as Asda/Walmart, while Waitrose, part of the John Lewis Partnership, is the most up-market of the leading chains. Iceland, Aldi, and Lidl are all price-focused outlets.

**Private Label** - The UK has one of the most advanced private label markets in the world and is seen as a flagship market for private label development. The UK's major supermarket chains dominate the private label market and on average 50 percent of products in their stores are private label. Originally, private label goods were a copy of a branded product but today they are often innovative and marketed as a premium or high-quality brand. They give UK retailers the opportunity to diversify their product ranges and develop new revenue streams.

**Internet or Online Shopping** – Online shopping has been increasing year on year; however, Covid-19 has fueled this trend even further and it now accounts for 11.5 percent of all grocery sales. Online grocery shopping gained more ground and attracted more new shoppers in 2020 than it has in the previous five years combined. Online delivery company Ocado has seen sales rise by 32 percent in the last four months while its market share reached a new high of 1.6 percent. Online market share will increase from 6.2 percent in 2019 to 8.9 percent in 2022. Online is the fastest-growing channel in 2020,



following dramatic increases in shopper numbers and bigger order sizes. According to Mintel, in 2019, the UK online grocery market was valued at \$15.2 billion; however, in 2020, it is forecast to grow by 33 percent to reach an estimated value of \$20.1 billion. This is because of a change in online shopping habits over the Covid-19 lockdown period. Half of the British population has limited the time spent in stores, while a further nine percent have used click and collect for their groceries. Click and collect allows customers to order all their grocery shopping online and then drive to the store to collect it from a designated point. Click and collect lockers are also available at some underground stations. With the virus, a new audience to online grocery shopping has emerged, and this could boost the market long term with strong growth forecast through to 2024. Online grocery shopping is now offered by all the major UK supermarket chains. Outside of these suppliers, the market is mainly populated by a wide range of specialized retailers, many of which offer products that are not always available in major supermarkets.

**Department Stores** - Marks and Spencer (M&S) food halls continue to maintain successful business growth. Most M&S customers tend to buy the bulk of their groceries from less high-end retailers. A typical shopper uses M&S for special occasions, for convenience food such as ready-meals and as a top-up to their regular shop with a few luxury items. M&S consistently offers innovative, high quality and rigorously checked food. The London-based Department Stores: Harvey Nichols and Selfridges have expanded to other major UK cities such as Birmingham, Manchester, and Leeds. This has increased sales of U.S. products sold in their food halls. Other notable department stores stocking products from the United States are Fortnum & Mason and Harrods. Department Store food halls provide a unique opportunity for U.S. specialty foods. Also, the department stores do not sell vast quantities of products like the major supermarket chains do, allowing smaller U.S. companies can keep up with demand.

**Convenience Chains** - The focus of these stores is mainly brands that are well known to the British consumers. They are in town centers, train and metro stations as a convenient stop for commuters and families making small purchases on evenings or weekends. Also, major supermarket chains have all opened small format convenience type stores.

**Other Retailers** - B&M and Home Bargains now sell a lot of non-perishable grocery items, both of which also carry a large U.S. fixture of predominately confectionery ranges. The UK has other outlets for U.S. products such as health food stores, mail/internet order companies and delicatessens. U.S. exporters typically work through UK importers to reach these smaller customers. For further information on the UK retail sector, please see the UK Retail Market Briefs, which can be found looking at the [FAS reporting](#) website.

## **Hotel, Restaurant & Institutional (HRI) Sector**

In the UK, the HRI Sector is known as the Catering or Foodservice Industry and is generally considered to have two sectors:

- **Cost Sector:** Caterers within the cost sector traditionally do not derive substantial margins. Meal provision is out of necessity rather than as a result of a business opportunity being identified. Provision is governed by contract where pricing is controlled, if not fixed. Examples are: schools, hospitals, prisons and specialist care homes.

- **Profit Sector:** Here, potential business gains are the main motivator. It is usually allied to hospitality and leisure. Pricing is flexible. Examples are: restaurants, fast food chains, pubs, hotels and leisure venues.

In 2019, the UK foodservice sector (food and beverage sales to consumers) was estimated to be worth \$71 billion (£52.6 billion). The foodservice sector is the UK’s fourth largest consumer market following retail, cars, clothing and footwear and can provide many opportunities for prepared U.S. exporters. Although there are no official figures for 2020, between March and November sales dropped dramatically. The UK food service sector is now in the middle of a crisis having either been closed or operating under severe restrictions for most of the year. The average UK consumers ate out twice per week in 2019. The average amount spent per outing was \$12.62 per person on dinner, \$8.55 on lunch, \$4.27 on breakfast and \$5.34 on snacks per visit. People aged 18-29 tend to eat out the most. These figures include restaurants and pubs, but exclude hotels, health care and education.

**Supply Chain** - There are two main ways to enter the UK catering market. Some companies go direct to suppliers, domestic or foreign. However, by far the most popular way is through an intermediary such as a UK-based importer. Because there are many small companies operating in the catering market, intermediaries skilled at filling small orders play a crucial role in the distribution of products. The importer normally takes title of the goods (i.e. ownership) following the purchase from a supplier to resell to trade customers. The UK’s foodservice industry holds many avenues of opportunity for U.S food and beverage products. Networking within the industry is vital to ascertain the best market entry strategy. For further information on the HRI sector please see UK HRI report which can be found using the following link: [Foodservice.](#)

## V. AGRICULTURAL AND FOOD IMPORTS

### Top Imports from the United States of Most Popular Products

Product Category	Growth 2014 –2019 (%)	U.S. Exports in 2019 (\$ million)
Forest Products	+45.7	930.0*
Wine & Beer	+5.0	249.4
Tree Nuts	+23.1	210.8
Prepared Food	+71.4	151.0
Distilled Spirits	+21.3	111.3
Soybeans	-7.0	100.0
Fish Products	-45.4	77.2
Fresh Vegetables	+58.3	77.1
Processed Fruit & Vegetables	-49.6	48.7
Snack Foods (excl nuts)	-15.8	48.7
Chocolate & Cocoa Products	+56.6	41.0

Live Animals	-59.8	36.6
Condiments	+27.0	33.0

Source: BICO Report/U.S. Bureau of the Census Trade Data

\*Denotes Highest Export Levels Since at Least CY 1970.

## VI. KEY CONTACTS AND FURTHER INFORMATION

If you have any questions or comments regarding this report, require a listing of UK importers or need any other assistance exporting to the United Kingdom, please contact the USDA office in London.

### United States Department of Agriculture

Embassy of the United States of America, 33 Nine Elms Lane, London, SW11 7US

Tel: +44 20 7891 3313, E-Mail: [aglondon@fas.usda.gov](mailto:aglondon@fas.usda.gov) Twitter: @USagricultureUK

Website: [www.fas.usda.gov](http://www.fas.usda.gov) or <https://uk.usembassy.gov/embassy-consulates/government-agencies/foreign-agricultural-service/fas-contact/>

**Department for Environment, Food & Rural Affairs** – Government Agency for Agriculture.

Tel: +44 20 7238 6951 E-mail: [helpline@defra.gsi.gov.uk](mailto:helpline@defra.gsi.gov.uk) Website: [www.defra.gov.uk](http://www.defra.gov.uk)

**Food Standards Agency** - Government Association on UK food safety standards and policies

Tel: +44 20 7276 8829 Email: [helpline@foodstandards.gsi.gov.uk](mailto:helpline@foodstandards.gsi.gov.uk) Website: [www.food.gov.uk](http://www.food.gov.uk)

**United States Mission to the European Union** - U.S. Government Office for EU agricultural policy.

Tel: +32 2 811 4154 E-mail: [AgUSEUBrussels@fas.usda.gov](mailto:AgUSEUBrussels@fas.usda.gov) Website: <http://www.usda-eu.org/>

### UK Trade Associations

**Institute of Grocery Distribution** - Food and grocery chain trade association.

Tel: +44 1923 857141 E-mail: [askigd@igd.com](mailto:askigd@igd.com) Web: [www.igd.com](http://www.igd.com)

**Food and Drink Federation** - Trade association for UK food and drink manufacturing industry.

Tel: +44 20 7836 2460 E-mail: [generalenquiries@fdf.org.uk](mailto:generalenquiries@fdf.org.uk) Website: [www.fdf.org.uk](http://www.fdf.org.uk)

**Fresh Produce Consortium** - UK trade association for the fresh produce industry

Tel: +44 1733 237117 E-mail: [info@freshproduce.org.uk](mailto:info@freshproduce.org.uk) Website: [www.freshproduce.org.uk](http://www.freshproduce.org.uk)

**British Health Food Manufacturer's Association** - Association for natural health products industry.

Tel: +44 20 8481 7100 E-mail: [hfma@hfma.co.uk](mailto:hfma@hfma.co.uk) Website: [www.hfma.co.uk](http://www.hfma.co.uk)

**British Frozen Food Federation** - UK trade association for all aspects of the frozen food industry.

Tel: +44 1400 283 090, E-mail: [generaladmin@bff.co.uk](mailto:generaladmin@bff.co.uk) Website: [www.bfff.co.uk](http://www.bfff.co.uk)

### Attachments:

No Attachments