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Exporter Guide

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Report Highlights:
The UK has strong social and cultural ties to the US, demonstrated by the similarities in consumer trends in both the retail and foodservice markets. The UK presents strong market opportunities for many US consumer-orientated products, including specialty food products, “healthy” food items, wine, sauces, fruit, nuts and juices. “Health” and convenience foods are main driving forces in the UK value-added food and beverage market. Consumers in this wealthy country are looking for variety in high quality food products, especially those perceived to have health benefits.

Post:
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SECTION I. MARKET OVERVIEW

Economic Situation

The UK, a leading trading power and financial center, is the sixth largest economy in the world and the second largest economy in Europe, after Germany. Services, particularly banking, insurance, and business services, account for the largest proportion of Gross Domestic Product (GDP) while 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 1 percent of GDP. While UK agriculture produces about 60 percent of the country's food needs with less than 2 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 government raised value added tax (VAT) in 2011 from 17.5 percent to 20 percent hoping to improve the financial situation.

The UK is very receptive to U.S. goods and services. With its $2.3 trillion GDP, the UK remains one of the United States' top European markets and the fifth largest market worldwide for all goods, after Canada, Mexico, China and Japan. In 2012, the U.S. exported $54.8 billion of industrial and agricultural goods to the UK.

U.S agricultural, fish, and forestry exports to the UK reached $2.0 billion in 2012, a record. Consumer oriented food and beverage products remain the most important sector, amounting to 50 percent ($896 million) of total U.S. exports of agricultural, fish and forestry products to the UK. Demand for U.S. consumer oriented food products versus bulk commodities continues to differentiate the UK from its European neighbors. This figure secures the UK as the top EU destination and fourth largest global destination for U.S. consumer-orientated goods.

UK Demographics

According to the UK Office for National Statistics (ONS), in July 2012, the population of the United Kingdom was estimated at 63.7 million, up by 420,000 since June 2011.

According to the latest data available (2011), the South East of England is home to some 8.6 million residents (13.7 percent of the population, followed by London, which has 8.2 million people (13 percent of the population). Thus, over a quarter of the UK population lives in London and in the South East of the country. The two regions together cover less than one tenth of the UK's land area. The North West (Manchester, Liverpool etc.) had the third largest population with 7.0 million residents (11.2 percent of the population).

The UK population continues to age gradually. The number of people aged 85 and over was more than 1.5 million in 2012 accounting for 2.4% of the total population.

In 2012, just over ninety percent of the UK population was listed as white with 9.1 percent belonging to mixed or non-white ethnic groups. There are many ethnic groups in the UK including large populations from Asia, the Caribbean and Africa. Consequently, the UK has a wide variety of ethnic restaurants particularly in London and other major cities in the country.

Almost two thirds of households in the UK are one or two person households.

Key Influences on UK Consumer Demands

- Slow population growth
- Ageing population
- Number of household units growing
- Smaller households (notably one-person households)
- Growing personal disposable income (boosting premium/convenience/eating out)
- Rise in number of working women (46% 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, 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)
- Higher number of population urban based rather than rural.

Trends in Imports from the United States of Consumer-Orientated Foods

Product Category	Growth 2008 –2012 (%)	U.S. Exports to UK 2012 ($m)
Wine & Beer	+0.12	226
Other Consumer-Oriented Products	+60	164
Tree Nuts	+49	130
Processed Fruit & Vegetables	-24	95
Salmon, Canned	+1.9	73
Snack Foods (excl nuts)	+32	61
Fresh Fruit	-51	50
Fresh Vegetables	+33	36
Rice	-48	20
Eggs and Products	-7.8	15
Fruit & Vegetable Juices	-25	9

Breakfast Cereals & Pancake Mix	+16	9
Dairy Products	-67	7
Pet Foods (Dog & Cat Food)	-57	4
Red Meats, Fresh/Chilled/Frozen	-90	3
Red Meats, Prepared/Preserved	+65	2
Poultry Meat	-70	2
Nursery Products & Cut Flowers	-39	1

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

Relative strengths/weaknesses of U.S. Supplier to UK market

Opportunities	Constraints
The scale of the U.S. food industry may offer price competitiveness on large volume orders.	Competition from EU member states (import duty payable on U.S. products).
The UK climate limits growing seasons and types of products grown.	Poultry and red meat are highly regulated from the EU, as are dairy product imports from the U.S.
The diversity of the U.S. population creates innovative food products and concepts which are often mirrored in the UK.	Must meet strict UK/EU/retailer rules on food safety, traceability, environmental issues and plant inspection.
U.S. has good brand image in UK. The U.S. is a popular destination for the UK tourist and familiarity with U.S. products is widespread.	Labels, including nutritional panels need to be changed. Pack sizes and palletization may also need changing.
A common language means that the UK is a natural gateway into Europe.	Need to develop relationship with UK trade contacts and invest in marketing product.
The UK has a core group of experienced importers with a history of sourcing from the U.S.	Biotech (GMO) ingredients are not widely accepted by the UK consumer, perhaps due to aggressive negative press.
Strong interest in innovative products. Currently there is high interest in natural, “wholesome” and “health” food categories.	Taste buds differ in the UK, eg. here popcorn is sweet, relishes are like jam, and spicy does not mean high chili content.

The UK can be a successful market for those companies willing to invest the time and resources to cement contacts. It is a good place to “test the waters” of the broader EU market. It normally takes on average 18 months from initial market survey to the time product appears on shelves. Exhibiting at UK food trade shows is an effective way to put new product in front of a wider audience.

SECTION II. EXPORTER BUSINESS TIPS

Essential UK Market Considerations

When looking at the UK market the following considerations should be thought about.

- Basic market research
- 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
- 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.
Biotech (GMO)	Biotech products or products that contain biotech ingredients can only be sold in the EU if the biotech (GMO) trait has been given approval. This is generally not an issue as normally the EU has approved all U.S.-grown mainstream ingredients before a product could be imported. The onus is on the UK customer to ask the necessary questions of the U.S. exporter to know whether the product contains biotech ingredients. If the product does contain biotech ingredients that are EU approved, it may be sold with the appropriate labelling - that involves a positive statement of its presence in the food product, please see: http://ec.europa.eu/food/food/biotechnology/gmfood/labelling_en.htm . 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 (these, typically, account for 45-50% of supermarket lines). Many large companies with a presence in the UK/EU have also taken a non-GMO approach, as well as many restaurants and cafes.
Organic	The United Kingdom, unlike most European nations, has suffered from declining organic sales in recent years. Sales peaked in 2008 and have since then been in decline. However, some organic products have had increased success; including, baby food, vegetable and seed oils and non-food products such as textiles and health and beauty products. The United Kingdom has lacked sufficient marketing for organics, and mainstream British consumers remain unconvinced, or uneducated, about the benefits of organic products. Organic products have become increasingly popular throughout Europe, except for in the United Kingdom where organic farmland decreased by 8.7 percent in 2012 and the market experienced a 4 percent loss in organic producers. UK sales of organic products in 2012 were £1.64 billion ($2.5 billion); 1.5 percent down on the previous year.
Health	Like the U.S., the UK has a high incidence of heart disease and cancer. Consumers are looking for foods 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.
Package Sizes	UK households are mainly comprised of 2 people. In addition, kitchens and refrigerators are small. Shopping is undertaken every couple of days, with perhaps a “large shop” every 2-3 weeks. U.S. suppliers should consider this in determining export package size.

Food Standards and Regulations

The UK follows EU policies regarding labeling and ingredient requirements. A detailed report that specifically addresses labeling and ingredient requirements is available, entitled: EU Food and Agricultural Import Regulations & Standards Country Report (FAIRS) can be obtained from the FAS homepage: http://gain.fas.usda.gov/Pages/Default.aspx or alternatively email aglondon@fas.usda.gov

General Import and Inspection Procedures

Her Majesty’s Revenue & Customs (HMRC) are responsible for the clearance of all goods entering the UK, for further information and customs forms please go to www.hmrc.gov.uk .

SECTION III. MARKET SECTOR STRUCTURE & TRENDS

The UK retail grocery market was valued at ₤169.7 billion ($263.0 billion) in 2012, an increase of 3.7 percent on 2011.

In 2013 groceries account for 9 percent of total household spending in the UK, making it the third largest area of expenditure (the largest is housing, and the second largest is transport).

Food and grocery expenditure accounts for 54.9p in every £1.00 of retail spending.

Convenience store shopping now accounts for 20.5 percent of the total UK food & grocery market. 21p in every £1.00 in food and grocery is spent in convenience stores.

17 percent of UK grocery shopping is now done via the internet.

Retail Sector

Supermarket Chains

Five supermarket chains dominate UK food retailing, accounting for 82 percent of the market. Tesco is the market leader, with 30.2 percent market share, followed by Asda/Wal-Mart with 17.3 percent, Sainsbury’s has 16.6 percent, Morrison’s has 11.1 and the Cooperative rounds out the quintet with 6.5 percent. Other UK supermarket chains include Waitrose, Iceland, Aldi, Lidl and Marks and Spencer.

Market Shares of the UK’s Supermarket Chains

Retailer	Market Share %
Tesco	30.2
Asda/Wal-Mart	17.3
Sainsbury’s	16.6
Morrison’s	11.1
Cooperative	6.5
Waitrose	4.9
Marks & Spencer	3.8
Aldi	3.7
Lidl	3.0
Iceland	2.0

Source: Kantar Worldpanel, market share summary, 12 weeks to September 15, 2013.
These market shares are updated monthly, so there can be a slight change month to month.

In a similar pattern to that of three years ago, the discounters (Aldi & Lidl) are seeing strong growth in sales. With a 30% annual sales rise in sales at Aldi and Lidl increasing its marketshare to 3.1% an all-time high.

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/Wal-Mart slightly down-market. Morrison’s and the Cooperative both compete at much the same level as Asda/Wal-Mart, 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.

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 47 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. In comparison the Netherlands has 38 percent private label products and the United States has only 19 percent.

The Institute of Grocery Distribution (IGD) estimates that UK internet grocery sales amounted to £6.5 billion ($10.4 billion) in 2013, up 50% since 2010. Although this growth is rapid, online sales still remain a small part of the market. 17% of shoppers now use the internet for their food grocery shopping. Although this is still a small part of the industry sales are growing year on year.

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 offer 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 U.S. products are Fortnum & Mason and Harrods. Department Store food halls provide a unique opportunity for U.S. specialty foods.

Convenience Chains

The focus of these stores is mainly brands that are well known to the British consumers. They are located 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 begun to open small format convenience type stores.

Other Retailers

The UK has other outlets for U.S. products such as health food stores, mail/internet order companies and delicatessens. An importer is vital to reach these smaller customers.

For further information on the UK retail sector, please see UK Retail Market Briefs which can be found by clicking on the following hyper links: Retail, Outlets, Supermarket Chains.

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 tends to be 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: This is the area of the foodservice market in which the potential business gains are the main motivator. It is also usually allied to hospitality and leisure. Pricing is flexible and examples are: restaurants, fast food chains, pubs, hotels and leisure venues.

The UK foodservice market was estimated to be valued at $69.4 billion (£43.4 billion) in 2012. The consumer spend on out of home catering is approximately £75 billion. This includes spending on hotel services like accommodation. This compares to £95 billion spent in retail.

Breakdown of Food Market Value by Operator Type in 2012

	Food Sales (£ Millions)	Share (%)
Restaurants	10,181	23.4
Fast Food	11,683	25.4
Pubs	5,185	11.9
Hotels	8,366	19.3
Leisure	3,733	8.6
Staff Catering	2,523	5.8
Health Care	916	2.1
Education	1,254	2.9
Services/Welfare	265	0.6
Total	43,406	100.0

	Number of Outlets	Share (%)
Restaurants	28,606	11.0
Fast Food	31,811	12.3
Pubs	45,042	17.4
Hotels	45,401	17.5
Leisure	19,888	7.7
Staff Catering	18,412	7.2
Health Care	32,044	12.4
Education	34,349	13.3
Services/Welfare	3,076	1.2
Total	258,630	100.0

Source: Horizons FS Limited 2012

The food service sector is the UK's fourth largest consumer market following retail, cars, clothing and footwear.

Shoppers are currently eating out more frequently than they were 5 years ago. IGD estimates that 30% of shoppers eat out once a week or more, compared to only 13% 5 years ago.

About 3 million meals are eaten at work every day of which two million are prepared by contract caterers. British consumers are exposed to many different cuisines from around the world, with non-European foods being popular. As many as 7 out of 10 of Britons state that they like and eat non-European styles of food. The food service sector serves 8.6 billion meals a year, equivalent to 39,000 a minute.

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 a large number of 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 food service 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

Food Processing

The food and drink manufacturing industry is the country's largest single employer. Food and drink is also the largest manufacturing industry in the UK, with an annual turnover in 2012 of $121.6 billion (£76.0 bn). Around 400,000 people across Britain are employed in jobs associated with food and drink manufacture and sales, accounting for 15% of total employment in the country.

In 2012, there were more than 6,500 food-manufacturing enterprises in the UK. Many of these are small companies employing less than 10 people. UK multinationals such as Unilever and Diageo are among the largest in Europe. Many U.S. companies, such as Kraft, Pepsico, Kellogg's, ADM, ConAgra and Cargill, also have substantial interests in the UK.

The major unprocessed commodities that are not commercially produced by the UK are rice, citrus fruit, bananas, corn, coffee, cocoa, stone fruit, tea and some oilseeds. Although the UK produces beet sugar, cane sugar is imported. Processed products that the UK has to import include wine and preserved/frozen fruit and fruit juices.

SECTION IV. BEST HIGH-VALUE PRODUCT PROSPECTS

Product Category	Total UK Imports 2012 ($ million)	UK Imports From U.S. 2012 ($ million)	Average Annual U.S. Import Growth (last 5 yrs)	U.S. Import Tariff Rate	Key Constraints to Market Development	Market Attractiveness for USA
Fish and Seafood HS: 03	2,502	61.7	-24%	0-22%	Highly fragmented market, domestic shortfall.	U.S. #1 canned salmon supplier, developing interest in other products and species
Chocolate confectionery HS: 1806	1,742.0	22.6	+36%	8-27%	Domestic & EU competition, low acceptance of American chocolate taste	British eat more chocolate than any other nationality.

Vegetables & Fruit prepared in Vinegar HS:2001	136.9	0.3	-5.7%	0-16%	Competition from Turkey, Netherlands and India	Food has long shelf life
Preserved fruit & nuts HS: 2008	587.2	26.5	+50%	7-27%	Competition from EU, Thailand & South Africa	U.S. nut butters perceived as high quality, exotic preserved fruits of interest for gift/specialty trade
Fruit & Vegetable Juice HS: 2009	1,120	9.0	-23%	16-23%	Competition from EU and Brazil	High focus on healthy living in UK. Juices now more popular than carbonated drinks
Sauces, Condiments, Seasonings HS: 2103	837.9	24.9	+0.7%	0-10%	Australia starting to enter the market	U.S. #4 supplier, UK wants authentic tex-mex, BBQ sauces, marinades & salad dressings
Soft drinks HS: 2202	975.1	8.2	-4.2%	0-10%	Domestic & EU competition, strong brands, market reaching saturation	New U.S. concepts in beverages always attractive, e.g. functional drinks
Beer HS: 2203	686.3	5.9	-41%	0%	Domestic & EU competition, major brewers located in EU	U.S. micro-brew beers, generally unique beers with a story. They are attractive to a niche audience
Wine HS: 2204	5,062.1	224.4	-7.2%	18-25%	Competition from EU, Australia, Latin America & S. Africa. Figure shows a minus due to wine being shipped to Italy and then the UK.	UK #1 export market for U.S. wine, California wine has 16% market share, other parts of U.S. should benefit in future

Source: Global Trade Information Services.

SECTION V. KEY CONTACTS AND FURTHER INFORMATION

Foreign Agricultural Service
U.S. Department of Agriculture
Embassy of United States of America
24 Grosvenor Square
London W1A 1AE

Tel: +44 20 7894 0040
E-mail: AgLondon@fas.usda.gov
Web: www.usembassy.org.uk/fas/index.html

Contact For: U.S. Government Agency for information on UK market, exporting from the U.S. to the UK. Policy information etc.

Department for Environment, Food & Rural Affairs
Nobel House, 17 Smith Square, London, SW1P 3JR
Tel: +44 20 7238 6951 Fax: +44 20 7238 2188
E-mail: helpline@defra.gsi.gov.uk
Website: www.defra.gov.uk

Contact For: UK Government Agency for any information on the UK Agricultural sector.

Food Standards Agency
Aviation House, 125 Kingsway, London WC2B 6NH
Tel: +44 20 7276 8829 Fax: +44 20 7238 6330
Email: helpline@foodstandards.gsi.gov.uk
Website: www.food.gov.uk

Contact For: UK Government Association for information on UK food safety standards and policies.

United States Mission to the European Union
Office of Agricultural Affairs
Boulevard du Regent 27
B-1000 Brussels
B-Belgium

Tel: +32 2 811 4154 Fax: +32 2 811 5560
e-mail: AgUSEUBrussels@fas.usda.gov
http://www.usda-eu.org/

Contact For: U.S. Government Office dealing with EU agricultural policy information.

UK Trade Associations

Institute of Grocery Distribution
Grange Lane, Letchmore Heath, Watford, Hertfordshire, WD25 8GD
Tel: +44 1923 857141 Fax: +44 1923 852531
E-mail: igd@igd.com
Web: www.igd.com

Contact For: UK trade association for information about the food and grocery chain.

Food and Drink Federation
6 Catherine Street, London, WC2B 5JJ
Tel: +44 20 7836 2460 Fax: +44 20 7836 0580
E-mail: generalenquiries@fdf.org.uk
Website: www.fdf.org.uk

Contact For: UK trade association which is the voice of the UK food and drink manufacturing industry.

Fresh Produce Consortium
Minerva House, Minerva Business Park
Lynch Wood, Peterborough PE2 6FT
Tel: +44 1733 237117 Fax: +44 1733 237118
E-mail: info@freshproduce.org.uk
Website: www.freshproduce.org.uk

Contact For: UK trade association for the fresh produce industry.

British Health Food Manufacturer's Association
1 Wolsey Road, East Molesey, Surrey KT8 9EL
Tel: +44 20 8481 7100 Fax: +44 20 8481 7101
E-mail: hfma@hfma.co.uk
Website: www.hfma.co.uk

Contact For: UK trade association which works effectively to represent the interests of the UK natural health products industry at all levels of the legislative, regulatory and Parliamentary process.

British Frozen Food Federation
Warwick House, Unit 7, Long Bennington Business Park
Main Road, Long Bennington, Newark, NG23 5JR

Tel: +44 1400 283 090 Fax: +44 1400 283 097
E-mail: generaladmin@bff.co.uk
Website: www.bfff.co.uk

Contact For: UK trade association for all aspects of the frozen food industry.

APPENDIX - STATISTICS

TABLE A. KEY TRADE & DEMOGRAPHIC INFORMATION FOR 2012

UK Agricultural Imports From All Countries ($Mil) U.S. Market Share (%) [1/]	69.0 2.9%
UK Consumer Food Imports From All Countries ($Mil) U.S. Market Share (%) [1/]	45.8 1.9%
UK Edible Fishery Imports From All Countries ($Mil) U.S. Market Share (%) [1/]	4.0 3.3%
UK Total Population (Millions) / Annual Growth Rate (%)	63.7 Million 0.5% Growth
UK Urban Population (Millions)	55 Million
Number of Major Metropolitan Areas [2/]	36
Size of the Middle Class (%) [3/]	30-43%
Per Capita Gross Domestic Product (U.S. Dollars)	$37,500
UK Unemployment Rate (%)	8.0%
UK Per Capita Food Expenditures (U.S. Dollars) per person per week	$29.54
UK Percent of Female Population Employed [4/]	65.4 %
Exchange Rate (U.S.$1 = £)	1.6

Footnotes

1/ From Global Trade Atlas

2/ Population in excess of 1,000,000

3/ Middle class is "defined as individuals who have average incomes of more than £25,500"

4/ Percent of number of women (16- 64 year olds).

TABLE B. CONSUMER FOOD & EDIBLE FISHERY PRODUCT IMPORTS

(In billions of United States Dollars, rounded to the nearest million)

Commodity	UK Imports from the World			UK Imports from the U.S.			U.S. Market Share %		
	2010	2011	2012	2010	2011	2012	2010	2011	2012
Consumer Oriented Agric. Total	40.6	45.3	45.8	0.8	0.8	0.8	1.9	1.7	1.9
Fish & Seafood Products	3.4	4.1	4.0	0.1	0.1	0.1	2.9	2.4	3.3
Agricultural Total	52.7	59.1	59.6	1.5	1.6	1.5	2.8	2.7	2.6
Agricultural, Fish & Forestry	61.3	68.5	69.0	1.9	2.1	2.9	3.1	3.1	2.9

Source: Global Trade Information Services.

TABLE C – TOP 15 SUPPLIERS OF CONSUMER FOODS & EDIBLE FISHERY PRODUCTS

UK - Top 15 Suppliers of Consumer Food Imports

	2010 ($ millions)	2011 ($ millions)	2012 ($ millions)
Netherlands	6,434.7	7,010.1	7,298.5
Ireland	4,472.3	5,081.9	5,052.9
France	4,641.4	5,064.6	5,445.4
Germany	3,575.0	4,054.7	4,203.2
Spain	2,877.6	3,313.6	3,291.9
Italy	2,788.6	2,992.3	2,990.7
Belgium	2,352.8	2,735.5	2,657.3
Denmark	1,685.6	1,922.1	1,844.9
Poland	926.6	1.205.8	1,380.6
New Zealand	853.9	938.4	903.7
United States 1/	**815.9**	**870.3**	**877.2**
Thailand	741.1	837.8	799.0
Brazil	632.4	700.2	725.1
South Africa	767.3	707.8	725.1
Chile	649.6	725.8	658.8
World	**40,610.7**	**45,277.7**	**45,877.3**

1/ note that this data under-represents actual U.S. sales to the UK as an undetermined amount of products is transshipped via other EU member states.

Source: Global Trade Atlas

UK – Top 15 Suppliers of Fish & Seafood Products Imports

	2010 ($ millions)	2011 ($ millions)	2012 ($ millions)
Iceland	444.6	445.4	423.5
Thailand	230.6	321.8	312.6
Denmark	248.8	268.0	272.2
Germany	228.8	274.2	264.4
China	217.9	293.3	259.4
Faroe Islands	183.4	249.2	232.0
Norway	168.5	158.7	195.0
Canada	123.7	136.4	140.4
United States 1/	**117.9**	**145.1**	**137.9**
Netherlands	123.6	144.6	129.7
Sweden	116.4	113.9	121.1
Mauritius	106.5	94.5	111.5
Russia	73.5	81.4	115.5
Poland	87.4	93.7	110.0
Vietnam	92.0	123.1	103.8
World	**3,421.1**	**4,057.8**	**4,034.4**

1/ note that this data under-represents actual U.S. sales to the UK as an undetermined amount of products is transshipped via other EU member states.

Source: Global Trade Atlas