Foreign Agricultural Service
GAIN Report
Global Agriculture Information Network

Scheduled Report - public distribution

Date: 12/21/1999

GAIN Report #UK9065

United Kingdom

Exporter Guide

1999

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Report Highlights: This report provides information to U.S. companies interested in doing business in the United Kingdom. It focuses on exports of consumer oriented foods, beverages, edible fishery products and food ingredients.

Includes PSD changes: No
Includes Trade Matrix: No
Annual Report
London[UK1], UK

SECTION I. MARKET OVERVIEW

The UK economy is one of the strongest in Europe, with high growth of its Gross Domestic Product (GDP) , modest inflation and low unemployment. Data for the third quarter of 1999 shows that the economy continues to grow at an increasing pace. Growth in the service sector has regained some momentum, while the manufacturing sector has recovered from its earlier decline, and now shows increasing growth particularly in a number of hi-tech areas.

The UK population has grown steadily in recent years, recorded at just over 59.2 million in 1998. That said, the population is stabilizing, with some forecasters (including the United Nations) suggesting it will go into steady decline in the coming years, reaching 57 million by 2050. Almost 90 percent of the UK population is to be found in England, one of the most urbanized areas in Europe. Of this total, over 7 million people live in Greater London (the area within the M25 ringroad).

UK: Population Trends, 1994 -1998

'000s

	1994	1995	1996	1997	1998
Males	28,592	28,727	28,856	28,990	29,128
Females	29,803	29,878	29,946	30,019	30,108
Total	**58,395**	**58,606**	**58,801**	**59,009**	**59,237**

Source: Office for National Statistics, 1999

The UK population is getting older; in 1998, 15.7 percent of the population was 65 years of age or older. There is also an increasing proportion of working women and the number of one-person households is on the increase. This is affecting the demands being placed on the retail sector. The UK consumer is now demanding more convenience foods (including both fresh and frozen ready meals), a greater variety and more specialty foods. Healthy eating, or "watching what you eat", is a growing trait as is the popularity of vegetarian and organic foods. Unprocessed and semi-processed products are decreasing in popularity. Although price remains important, disposable incomes are on the rise (average weekly earnings rose 4.4 percent to US$612 in 1998) and the UK consumer is becoming increasingly discerning with quality an important concern.

Advantages and Challenges Facing the U.S. Products in the UK

Advantages	Challenges
Market dominated by few retailers with strong market penetration. Sophisticated replenishment systems mean U.S. product would be widely distributed.	Retailers 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 a large number of specialist importers.	The UK has well-established brands for mainstream products. Brand building costs are substantial.

The U.S. has a good brand image in the UK.	Strict (EU) regulation. Labeling/ingredient requirements.
The country is English speaking.	Culture clash - U.S. exporters must appreciate that the UK is not the 51st state. Negative UK reaction to biotechnology and other agricultural practices commonplace in the U.S. highlight the importance of understanding the market. Indeed consumers are more wary of imports than of domestic product.
The U.S. is a popular destination for the UK tourist and familiarity with U.S. products is widespread.	Popularity of specialty products from many EU countries and U.S. competitors is high, eg French cheeses, Spanish citrus, Italian pasta, South African wines. In addition to higher transport costs, the U.S. has to compete with the duty free nature of intra-EU trade.
Strong purchasing power, sophisticated market.	High marketing costs.
Strong interest in innovative products.	

SECTION II. EXPORTER BUSINESS TIPS

General Consumer Tastes and Preferences

These are some generalities often heard from British businessmen.

- Most businessmen would rather have lunch than breakfast or dinner.
- The British food retail environment is fairly direct.
- You should go through an importer because retailers want regular contacts with their suppliers.
- While the British are less formal than they used to be there are still formalities to be observed, such as being on time for meetings and dressing formally.
- You should have plenty of business cards and brochures.

Food Standards and Regulations

The UK follows EU policies regarding labeling and ingredient requirements. A more detailed report that specifically addresses labeling and ingredient requirements in the UK is entitled: The UK: Food and Agricultural Import Regulations & Standards Report (FAIRS) and can be obtained from the FAS homepage at http://www.fas.usda.gov.

General Import and Inspection Procedures

HM Customs are responsible for the clearance of all goods entering the UK. When any food or agricultural product does not have the required documentation - i.e. animal or plant health, food safety certification, officials bring this to the attention of the Ministry of Agriculture which in turn alerts the Foreign Agricultural Service Office of Agricultural Affairs. That office then alerts the relevant USDA agency and/or the exporter to advise them which documentation has to be provided in order for the goods to be cleared.

If products not meeting EU/UK animal and plant health, and food safety legislation should enter the UK they will often time be destroyed or the exporter will be advised that they must be shipped back to the place of origin in the export chain.

For further information, please refer to the UK: Food and Agricultural Import Regulations & Standards Report (FAIRS), which can be obtained from the FAS homepage at http://www.fas.usda.gov.

SECTION III. MARKET SECTOR STRUCTURE AND TRENDS

The structure of the UK food market is one of the most concentrated in Europe. The UK has experienced considerable movement towards the "one-stop shopping" concept. Several large multiple retail chains dominate, to the detriment of the independent retailer.

The distribution chain starts with the U.S. producer/manufacturer/exporter who normally sends the product to a UK importer/agent. The importer will have responsibility for distribution to multiple retailers, independent retailers, foodservice chains or wholesalers as appropriate.

Retail Food Sector

The dominance of the five major retailers has continued to rise year on year since 1995. In 1998, the five major retailers accounted for nearly 68.9 percent of total retail sales. Tesco is the leading UK supermarket, with 20.5 percent of the market, followed by Sainsbury (18.0 percent), Asda/Wal-Mart (11.9 percent), Safeway (9.4 percent) and Somerfield (9.0 percent). Tesco is the strongest in the south of the country, Sainsbury in London, Asda in the North East and Safeway in Scotland.

Superstores in the UK are smaller than their counterparts in Germany or France, much of this a result of tight UK planning law: the stores of the two major players, Tesco and Sainsbury, average around 3,500m^2. The aforementioned restrictions and the resulting limited availability of suitable sites has fueled the move back towards smaller stores by some of the big players.

With sophisticated replenishment systems, the UK leaders are able to offer full food range in smaller stores and compete more effectively with the minor multiples, whose share of the market remains fairly static, accounting for 7.9 percent of retail sales in 1998. The two leading minor retailers are Morrisons (3.5 percent) and Iceland (2.7 percent).

The neighborhood has traditionally been the home of the independent retailer. However, here too the major retailers are making an impact. Tesco and Safeway have developed forecourt (gas-mart) based supermarket formats while Sainsbury has opened "Local" stores.

The discount market, predominantly Lidl and Netto, has been showing recent growth in the UK. However, the discount market's 2 percent share of retail sales is not expected to show much more growth following the introduction of low cost ranges by some of the major multiples. This move is yet another example of the moves made by the major retailers who are anxious to maintain their stranglehold on the UK retail market.

A key way in which UK retailers stand out against their Continental counterparts is with their own brands. Each retailer looks on the business as a brand. All of the major multiples and some of the smaller retailers have a substantial number of private (or own) label lines. The market leader Tesco has 45.9 percent of its total product lineage as own label, with Sainsbury in front with 50.4 percent, Asda with 46.0 percent, Safeway with 40.5 percent and Somerfield with 37.4 percent (figures are at March 1997). Goods carrying the company's brand are not necessarily cheap but, rather, are often quality goods competing with the brand leader. A good example is Tesco's "Finest" brand. The quality and value for money of these brands are then used by the retailers as marketing tools to attract custom.

Company Profiles

Retailer Name	Outlet Type	Operating name	Store Type	Ownership	Sales CY98 ($ mil)	No. of Outlets	Location	Purchasing Agent Type
Tesco	Major Retailer	Tesco Superstore Tesco Express Tesco Metro Tesco Compact	Large Store Gas Mart Mini Metro Town Store	UK	24010	479 15 40 51	Nationwide South Nationwide Nationwide	Importer, Direct
Sainsbury	Major Retailer	Sainsbury's Sainsbury Local Savacentre	Large Store Mini Store Large Store	UK	20380	391 2 13	Nationwide London Nationwide	Importer Direct
Asda/Wal-Mart	Major Retailer	Asda Dales	Large Store Discount Store	US	11401	210 7	Nationwide Nationwide	Importer Direct
Somerfield	Major Retailer	Somerfield/Gateway Food Giant Kwik Save	Town Store Discount Store Discount Store	UK	10185	533 24 871	Nationwide Nationwide Nationwide	Importer, Direct
Safeway	Major Retailer	Safeway	Large Store	UK	9953	422	Nationwide	Importer, Direct
Marks & Spencer	Variety Store	Food Section	Large Store	UK	5178	289	Nationwide	Importer, Direct
Morrisons	Minor Retailer	n/a	Large Store	UK	3765	95	England	Importer, Direct
Waitrose	Minor Retailer	n/a	Large Store	UK	2742	117	England	Importer, Direct
Iceland	Minor Retailer	n/a	Large Store	UK	2568	734	Nationwide	Importer, Direct
Aldi	Discounter	n/a	Large Store	Germany	1036	180	All but the South	Importer, Direct
Budgens	Minor Retailer	n/a	Large Store	UK	634	177	Midlands & South East	Importer, Direct
Netto	Discounter	n/a	Large Store	Denmark	486	113	England	Importer, Direct

Lidl	Discounter	n/a	Large Store	Germany	448	100+	Nationwide	Importer, Direct

As mentioned previously, UK retailers generally prefer to purchase through importers. However, the Agricultural Office in London does hold details of the buying procedures of individual retailers should exporters still prefer to make direct contact.

Hotel, Restaurant and Institutional (HRI) Sector

The HRI sector is highly fragmented and is generally referred to as the food service or catering sector, and includes both private (profit) and public (cost) outlets. The profit sector includes hotels, restaurants,
pubs, fast food, travel, cafes, take-away and clubs. The public sector is comprised primarily of health care, education and public service.

Independent and small catering chains source primarily through the wholesale markets, often via secondary wholesalers. The national catering chains increasingly source direct from importers.

There are almost 300,000 catering establishments in the UK which can be broken down as follows:

Catering Outlets in the United Kingdom, 1997

Profit Sector	Approx. No.	% of Total	% Change 1996-97
Hotels	60,861	20.4	+0.2
Restaurants	15,925	5.3	+0.1
Fast food (major chains)	1,913	0.6	+22.3
Cafes/take away	30,369	10.2	-0.9
Pubs/clubs	57,408	19.2	+1.5
Leisure	47,912	16.0	+14.1
Subtotal: Profit Sector	215,701	72.1	-1.0

Cost Sector	**Approx. No.**	**% of Total**	**% Change 1996-97**
Staff catering	21,396	7.2	-5.2
Health Care	24,102	8.1	+1.1
Education	34,514	1.1	+0.9
Subtotal: Cost Sector	83,304	27.9	
TOTAL	229,005	100.0	-0.7

Source: The Advertising Association, Marketing Pocket Book 1998, NTC Publications

Wholesale

The main function of the wholesale markets is to break bulk, distribute produce to secondary wholesale operations and to supply regional independent grocers and catering outlets. In 1996 (the last year figures are available) the total wholesale sector produced a turnover of $22.9 billion, up from $22.6 billion in the previous year. Cash and Carry rose from $14.8 billion to $15.1 billion and delivered trade from $7.5 billion to $7.8 billion.

The major London markets are based at Covent Garden, Western International, Spitalfields, Smithfield (Meat) and Billingsgate (Fish). In addition, most major cities in the UK have smaller wholesale markets, which are serviced by the major importer/distribution companies or the London markets.

The wholesale market system is under considerable pressure, and has been for some time due to a number of factors, including the recent UK economic recession. The main cause of its decline, however, is the role that the multiple retailers play and their dominance.

The role of the wholesale market has been reduced to supplying independent retailers and caterers. Increasingly, wholesalers handling specialty produce supply primarily to the catering trade. As much as 80 percent of customers are thought to be from this sector. The wholesale sector is characterized by a strong "day-to-day" nature of the trading activity, being a price dominant market, with little long term loyalty shown by buyers to suppliers. Promotional activities can stimulate sales in the short term, but often do not sustain long term development.

Domestic Food Processing Sector

The British food processing sector, with an output of around $83 billion, is one of the most advanced and developed in the world. Companies such as Unilever, Guinness and Grand Metropolitan are among the largest in Europe. Many U.S. companies, for example Pepsico, Kellogg's, ADM, ConAgra and Cargill also have substantial interests in the UK. The commercial companies that produce further processed and branded products vary in size, but the major brands recognized by most British consumers are mainly owned and produced by the larger companies.

As the UK is 59 percent self sufficient in all types of food and feed and 76 percent self sufficient in indigenous products, there is substantial demand for imported products. It is estimated that around 20 percent of the UK's agricultural imports are of unprocessed products, of which almost two thirds are not indigenous to the UK. Lightly processed products account for around 50 percent of agricultural imports, one third of which are not produced in the UK. Of the remaining 30 percent of agricultural imports (highly processed products), around half are non native to the UK.

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

SECTION IV. BEST HIGH VALUE PRODUCTS PROSPECTS

Key ongoing markets for U.S. products which show good growth potential are canned salmon, meal accompaniments, cooking sauces, vegetable and salad oils and dressings, confectionery, dips and salsa, frozen foods, exotic meats, wine and beer.

U.S. exports of consumer-oriented product to the UK (US$ thousands)

Product	**1996**	**1997**	**1998**
Snack Foods (excl. Nuts)	17,353	38,635	48,403
Breakfast Cereals & Pancake Mix	2,608	4,131	3,996
Red Meats, Fresh/Chilled/Frozen	13,533	15,624	24,891
Red Meat, Prepared/Preserved	1,127	335	684
Poultry Meat	3,992	4,413	1,210
Dairy Products	7,993	10,552	11,436
Eggs & Products	2,562	2,478	4,737
Fresh Fruit	54,049	62,018	65,021
Fresh Vegetables	12,806	17,943	20,629
Processed Fruit & Vegetables	120,178	110,074	105,392
Fruit & Vegetable Juices	19,675	22,476	23,373
Tree Nuts	80,941	59,132	59,623
Wine & Beer	102,509	123,841	164,243
Nursery Products & Cut Flowers	2,717	3,539	2,806
Pet Food (Dog & Cat Food)	36,844	24,302	23,259
Other Consumer-Oriented Products	50,896	87,483	82,510
Total	**529,783**	**586,976**	**642,213**

Source: BICO

SECTION V. KEY CONTACTS AND FURTHER INFORMATION

Office of Agricultural Affairs, American Embassy
U.S. Mailing Address: American Embassy PSC 801 Box 48 FPO AE 09498-4048
International Mailing Address: Embassy of the United States of America
24 Grosvenor Square, Box 48 London W1A 1AE
Phone: 44 207 408 8063
Fax: 44 207 408 8031
e-mail: aglondon@fas.usda.gov

FAS homepage: http://www.fas.usda.gov

KEY FOOD AND BEVERAGE TRADE ASSOCIATIONS

Food and Drink Federation
6 Catherine Street
London WC2B 5JJ
Tel: 0171 836 2460
Fax: 0171 836 0580

The Food and Drink Federation represents and promotes welfare of food and drink manufacturers, providing authoritative information to media, consumers, distributors, legislators, health professional, academics and schools. Its services division provides the secretariat for over 36 other food and beverage sector trade associations including the Association of Cereal Manufacturers, Association of Fish Canners, the Bakery Allied Traders' Association, British Fruit and Vegetable Canners Association, Fresh Produce Association, the Pet Food Manufacturers' Association, the Rice Association and the British Starch Industry Association.

Institute of Grocery Distribution
Letchmore Heath
Watford WD2 8DQ
Tel: 01923 857141
Fax: 01923 852531

IGD is a prominent source of data and analysis of the grocery industry - retail trade and manufacturing trade supplying the retailers. Its membership is made up of mainly food manufacturers and multiple grocers (national supermarket chains). The Institute offers its services to both members and non-members. Research/Information services fees can run from 15BPS for a minimal request (size of a particular product market and the provision of two names within that market) to 40BPS per hour for more detailed research/information. Within its publications service, the Institute publishes a monthly Grocery Market Bulletin reporting on the latest trends in national and international manufacturing, wholesaling, distribution and retailing.

Importers Division
Fresh Produce Consortium
266-270 Flower Market
New Covent Garden Market
London SW8 5NB
Tel: 0171 627 3391
Fax: 0171 498 1191

The Fruit Importers Division of the Fresh Produce Consortium operates through an elected Chairman. It provides market information to members,specifically Covent Garden Market prices (3 times a week), customs tariffs, etc.(when implemented), and a circular (once a week) on such items as requests from overseas Countries for contacts with members to handle their fresh produce in the UK, and information on new regulations.

MAJOR MULTIPLE SUPERMARKETS (UK-WIDE DISTRIBUTION)

J. Sainsbury plc
Mr. Robin Whitbread
Director, Grocery and non-foods
Stamford House
Stamford Street
London SE1 9LL
Phone: (0171) 921-6000
Fax: (0171) 921-6132

Tesco Food Stores
Mr. T. J. R. Mason
Marketing Director
Tesco House
Delamare Road
Cheshunt, Herts. EN8 9SL
Phone: (01992) 632222
Fax: (01992) 630794
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Mr. Roger Partington
Marketing Director
Safeway Food Stores
Argyll House
6 Millington Road
Hayes, Middlesex UB3 4AY
Phone: (0181) 848-8744
Fax: (0181) 573-1865
Telex: 934888

Mr. Steven Cain
Marketing Director
ASDA Stores
Asda House
Southbank
Leeds LS11 5AD
Phone: (0113) 243 5435
Fax: (0113) 241 8666

Mr. David Coles
Marketing Director
Somerfield Holdings
Somerfield House
Hawkfield Business Park
Whitchurch Lane
Bristol BS14 0TJ
Phone: (0117) 935 9359
Fax: (0117) 978 0629

OTHER MAJOR MULTIPLES (REGIONAL DISTRIBUTION)

Mr. John Dowd
Managing Director
William Morrison Supermarkets plc
Hilmore House
Thornton Road
Bradford BD8 9AX
Phone: (01274) 494166
Fax: (01274) 494831

Mr. Joe Imrie
Director of Food Purchasing
Waitrose
Doncastle Road
Southern Industrial Area
Bracknell
Berkshire RG12 8YA
Phone: (01344) 424680
Fax: (01344) 825294
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Mr. Mike Igoe
Marketing Controller, Retail Division
William Jackson & Son PLC
Gibson Lane
Melton
East Yorkshire HU14 3HH
Phone: (01482) 632099
Fax: (01482) 632419

Ms. Stephanie Rice
Marketing Controller
Budgens Stores Ltd.
P.O. Box 9
Stonefield Way
Ruislip
Middx. HA4 0JR
Phone: (0181) 422-9511
Fax: (0181) 864-2800

Mr. Chris Egan
Buying Director
Walter Willson Ltd.
Auckland House
Earlsway
Team Valley Trading Estate
Gateshead
Tyne & Wear NE11 0TB
Phone: (0191) 487-5086
Fax: (0191) 482-6676

CO-OPERATIVE SOCIETIES

Mr.G.J. Melmoth
Chief Executive
Co-operative Wholesale Society Ltd.
New Century House
P.O. Box 53
Corporation Street
Manchester M60 4ES
Phone: (0161) 834-1212
Fax: (0161) 834-4507
Telex: 667046

Mr. J. Plumley
Food Marketing Manager
Co-operative Retail Services Ltd.
Sandbrook Park, Sandbrook Way
Rochdale, OL11 1SA
Phone: (01706) 713000
Fax: (01706) 891207

Mr. Harry Taylor
General Manager Food Procurement
United Norwest Co-operatives Ltd.
Pit Lane
Talke Pits
Stoke on Trent
Staffs. ST1 5NW
Phone: (01782) 783588
Fax: (01782) 787331

Mr. Harridence
Marketing Manger
Central Midlands Co-operative Society Ltd.
Knightons Field Estate
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Phone: (01162) 704477
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DISCOUNTERS

Mr. G. Bowler
Managing Director
Kwik-Save Group PLC
Warren Drive
Prestatyn
Clwyd. LL19 7HU
Phone: (01745) 887111
Fax: (01745) 882005

Mr. T.M. Coates
Managing Director
Aldi Stores Ltd.
Holly Lane
Atherstone
Warwickshire CV9 2SQ

Phone: (01827) 711800
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FOOD HALLS IN DEPARTMENT STORES

Mr. Guy McCracken
Managing Director
Marks and Spencer
Michael House
47-67 Baker Street
London W1A 1DN
Phone: (0171) 935-4422
Fax: (0171) 487-2679

Mr. J.H. Corfield
Grocery Buyer
Fortnum & Mason
181 Piccadilly
London W1A 1ER
Phone: (0171) 734-8040
Fax: (0171) 437-3278
Telex: 21160

Vacant at 9/4/98
Director of Food Halls
Harrods
Knightsbridge
London SW1X 7XL
Phone: (0171) 730-1234
Fax: (0171) 225 6555

Mr. Tony Sweet
Foodhall Manager
Harvey Nichols & Co.
Knightsbridge
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Telex: 8814214

Ms. Sue McMillan
Head of Grocery Buying
Selfridges
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Fax: (0171) 495-8321
Telex: 24537

CONVENIENCE CHAINS

Europa Foods
Rowdell Road
Northolt
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Phone: (0181) 845 1255
Fax: (0181) 842 1353

WAREHOUSE CLUBS

Mr. Phil Lind
General Merchandise Manager
Price-Costco Europe (UK) Limited
Colne House
21 Upton Road
Watford
Herts. WD1 7TB
Phone: (01923) 213113
Fax: (01923) 218428

ORGANIC STORES

Mr. Jonathan Dwek/ Ms. Renee Elliott
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Planet Organic Limited
42 Westbourne Grove
London
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Phone: (0171) 221 7171
Fax: (0171) 221 1923

A. KEY TRADE & DEMOGRAPHIC INFORMATION

Agricultural Imports From All Countries ($Mil) / U.S. Market Share (%)	$28,484 / 6%
Consumer Food Imports From All Countries ($Mil) / U.S. Market Share (%)	$20,680/ 2%
Edible Fishery Imports From All Countries ($Mil) / U.S. Market Share (%)	$2,150 / 5%
Total Population (Millions) / Annual Growth Rate (%)	59.2 / 0.03%
Urban Population (Millions) / Annual Growth Rate (%)	19.95 / 2%
Number of Major Metropolitan Areas	8
Size of the Middle Class (Millions) / Growth Rate (%)	27.3/-2%
Per Capita Gross Domestic Product (U.S. Dollars)	$ 21,200
Unemployment Rate (%)	5.5%
Per Capita Food Expenditures (U.S. Dollars)	$1,965
Percent of Female Population Employed	38.7
Exchange Rate (US$1 = British Pound)	.6115

B. CONSUMER FOOD & EDIBLE FISHERY PRODUCTS IMPORTS

United Kingdom Imports (In Million of Dollars)	Imports from the World 1996	1997	1998	Imports from the U.S. 1996	1997	1998	U.S. Market Share 1996	1997	1998
CONSUMER-ORIENTED AG TOTAL	19,546	20,041	20,680	656	716	794	3	4	4
Snack Foods (Excl. Nuts)	961	1,003	1,038	14	15	19	1	2	2
Breakfast Cereals & Pancake Mix	62	70	70	2	7	12	3	9	17
Red Meats, Fresh/Chilled/Frozen	1,388	1,367	1,101	15	12	16	1	1	1
Red Meats, Prepared/Preserved	1,828	1,611	1,406	7	10	1	0	1	0
Poultry Meat	720	700	846	1	1	0	0	0	0
Dairy Products (Excl. Cheese)	829	865	879	4	5	6	0	1	1
Cheese	983	936	978	1	1	1	0	0	0
Eggs & Products	63	65	55	3	4	6	4	6	11
Fresh Fruit	2,371	2,431	2,521	79	89	100	3	4	4
Fresh Vegetables	1,477	1,555	1,633	13	15	18	1	1	1
Processed Fruit & Vegetables	1,933	1,878	1,976	122	127	121	6	7	6
Fruit & Vegetable Juices	469	371	441	22	23	28	5	6	6
Tree Nuts	197	212	182	66	59	55	34	28	30
Wine & Beer	2,745	3,135	3,437	132	148	196	5	5	6
Nursery Products & Cut Flowers	686	792	873	13	11	10	2	1	1
Pet Foods (Dog & Cat Food)	207	235	267	45	38	37	22	16	14
Other Consumer-Oriented Products	2,625	2,815	2,978	118	154	168	4	5	6
FISH & SEAFOOD PRODUCTS	1,901	1,916	2,150	113	106	111	6	6	5
Salmon	204	182	174	89	76	77	44	42	44
Surimi	45	36	28	1	2	1	3	5	5
Crustaceans	514	513	567	4	9	6	1	2	1
Groundfish & Flatfish	579	576	711	4	5	11	1	1	2
Molluscs	27	30	28	4	4	4	15	12	13
Other Fishery Products	532	578	643	10	11	12	2	2	2
AGRICULTURAL PRODUCTS TOTAL	28,187	28,554	28,484	1,525	1,630	1,610	5	6	6
AGRICULTURAL, FISH & FORESTRY TOTAL	33,649	34,403	34,391	1,977	2,113	2,047	6	6	6

Source: FAS' Global Agricultural Trade System using data from the United Nations Statistical Office

C. TOP 15 SUPPLIERS OF CONSUMER FOODS & EDIBLE FISHERY PRODUCTS

UNITED KINGDOM IMPORTS

CONSUMER-ORIENTED AGRICULTURAL TOTAL ($1,000)

	1996	1997	1998
United States	656,464	715,502	793,732
France	2,955,274	3,220,251	3,411,129
Netherlands	2,895,204	2,753,710	2,995,781
Ireland	2,430,638	2,487,008	2,399,027
Spain	1,373,359	1,583,670	1,683,054
Italy	1,364,823	1,402,521	1,477,971
Germany	1,280,743	1,239,738	1,275,578
Belgium	924,241	939,547	1,063,187
Denmark	1,067,973	1,037,389	933,569
New Zealand	719,937	669,396	597,429
S.Afr.Cus.Un	429,512	436,507	477,790
Australia	342,207	403,670	425,485
Brazil	229,302	244,812	250,246
Turkey	210,691	214,624	216,995
Chile	169,007	171,523	198,110
Other	2,496,612	2,520,847	2,481,062
World	19,546,052	20,040,733	20,680,166

FISH & SEAFOOD PRODUCTS TOTAL ($1,000)

	1996	1997	1998
United States	112,686	106,148	111,197
Norway	223,822	241,342	297,435
Iceland	270,877	253,112	295,002
Denmark	147,124	130,288	163,762
Thailand	115,593	123,421	157,941
Faroe Islands	170,327	167,752	140,535
Canada	98,560	86,824	100,117
Netherlands	59,608	64,052	65,903
Russian Federation	71,610	61,298	58,723
Spain	33,142	52,090	55,252
Indonesia	21,667	35,551	51,149
France	57,064	45,269	46,708
Germany	37,034	36,023	42,803
Ireland	28,970	31,502	39,781
Ghana	18,420	35,580	39,397
Other	434,752	445,430	484,090
World	1,901,257	1,915,691	2,149,811

Source: United Nations Statistics Division