



USDA Foreign Agricultural Service

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## United Kingdom

### Exporter Guide

### UK Exporter Guide

### 2007

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**Report Highlights:**

The UK has strong historic and political ties to the US, and continues to mirror closely consumer trends in the US retail and foodservice markets. The UK presents market opportunities for many US consumer-orientated products. The best prospects include high quality food products, healthy food items, wine, sauces, fruit juices and other consumer orientated food products. Health and convenience foods are the main driving forces in the UK value-added food and beverage market. The UK is a country with cash rich consumers looking for a variety of high quality food products from around the world, including the United States.

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## SECTION I. MARKET OVERVIEW

### Economic Situation

The UK is a major trading power house and financial center, that is actively engaged in all sectors of the country's economy. The UK is also one of the quintet of trillion dollar economies in Western Europe with rich consumers looking for high quality food products from around the world, including the United States. Services, particularly banking, insurance and business services account for three quarters of GDP while the manufacturing industry continues to decline in its importance. The country's economic growth is currently running at 2.7% annually with the mighty "British Pound Sterling" at its highest levels against the US dollar and other major currencies. Still, the economy is one of the strongest in Europe. Measured in terms of gross added value, UK agriculture represents less than 1% of total GDP.

The UK is very receptive to US goods and services. With its \$1.9 trillion GDP, the UK remains one of the United States' top European markets and fifth largest market worldwide, after Canada, Mexico, Japan and China.

As a percentage of all food products (locally produced and consumed), the UK can meet only 60 percent of the country's food needs; the other 40 percent of food needs are met with imports from the EU and other countries including the United States.

### UK Demographics

According to the UK Office for National Statistics (ONS), in 2006, the population of the United Kingdom was estimated at 60.6 million.

Since 1971, UK population has grown by 8 per cent. Growth has been faster in more recent years. The average growth per year since 2001 has been 0.5 per cent.

According to the latest data available, the South East of England is the region of the UK with the largest population, with 8.2 million residents in 2006, followed by London, which is home to 7.5 million people. Over a quarter of the UK population lives in London and in the South East of the country. These two regions together cover less than a tenth of the UK's land area. The North West had the third largest population with 6.9 million residents.

The UK has an ageing population. This is a result of a decline in the mortality rate and also fertility rates. This led to a declining proportion of the population under 16 and an increasing proportion of people over 65 years old.

The UK population comprises an ethnic mix of 4 percent Indian/Pakistani/Bangladeshi; 2 percent Black - Caribbean/African/Other; and 0.4 percent Chinese. There is also an increasing number of Latinos from South America. Consequently, the UK has the largest number of a variety of ethnic restaurants especially in London and other major cities in the country.

The UK, in common with much of the rest of Europe, has seen a substantial increase in the number of single person households. Over 30 percent of British households have just one member.

Summary of key influences on UK consumer demand:

- 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)

#### Trends in Imports of Consumer-Orientated Foods

Product Category	Growth 2002 –2006 (%)	US Exports to UK 2006 (\$m)
Wine & Beer	+37	262
Processed Fruit & Vegetables	+30	102
Fresh Fruit	+39	89
Other Consumer-Orientated Products	-5	87
Tree Nuts	+114	80
Salmon, Canned	+15	69
Snack Foods (excl nuts)	+64	40
Fruit & Vegetable Juices	+324	25
Fresh Vegetables	+93	23
Eggs & Products	+192	18
Red Meats, Fresh/Chilled/Frozen	+124	14
Pet Foods (Dog & Cat Food)	-4	12
Breakfast Cereals & Pancake Mix	-16	5
Red Meats, Prepared/Preserved	+353	3
Nursery Products & Cut Flowers	+6	2
Poultry Meat	-77	<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 US food industry may offer price competitiveness on large volume orders	Competition from EU member states (import duty payable on US products)
The UK climate limits growing seasons and types of products grown	Poultry and red meat are effectively banned from the EU, and dairy imports from the US are also restricted
The diversity of the US 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
US has good brand image in UK. The US is a popular destination for the UK tourist and familiarity with US products is widespread	Labels on packaged food need to be changed, particularly the nutritional panel. 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 US	Biotech (GMO) ingredients are not widely accepted by the UK consumer
Strong interest in innovative products, and currently there is high interest in natural, wholesome and health food categories.	Taste buds differ in the UK – e.g. there is little affinity for popcorn, peanut butter & US manufactured chocolate

**SECTION II. EXPORTER BUSINESS TIPS**

In order to meet export goals, it is essential for an exporter to do his homework:

- Why will the product work in the UK? - Do basic market research
- What is the target sector (retail/HRI/processing)?
- What is the preferred UK business partner & terms?
- What is the import duty, and excise tax (if alcoholic beverage)?
- Is the product liable for UK Value Added Tax?
- What are the sea/air freight & insurance costs?
- What is the UK final price point you are aiming for?
- Will the product label need to be altered?
- Are there any ingredients present that are not permitted in the EU?
- What resources can you offer to promote the products?

FAS has exporter assistance available at [www.fas.usda.gov](http://www.fas.usda.gov) ; direct questions on the UK can be directed to FAS London using the contact details on page 13 of this report.

**Local Business Customs**

Dress	Business suit or jacket, shirt, tie or no tie
Meals	UK trade contacts prefer a lunch meeting to either breakfast or dinner
Meetings	Bring business cards, brochures, samples; highlight company sales record
Negotiation	It is customary for UK contact to negotiate down from first price given
Agencies	An importer usually takes possession of the goods while an agent will not. Exclusive contracts are common to protect the investment made by the UK company. Fees and negotiated contracts vary, normally 5-15 percent is acceptable.
Entry	An importer usually checks import duty, labeling & ingredient regulation; a retailer or hotel chain may expect the U.S. company to organize this

**General Consumer Tastes and Preferences**

Food Safety	The UK has experienced several large food scares over the past two decades. As a result, the UK food chain is now heavily scrutinized, meaning that UK retailers, foodservice operators and manufacturers are uncompromising on trace-ability 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 they have been given approval. If the biotech ingredient is approved it may be sold with the appropriate labeling - see GAIN Report E47044 available at: <a href="http://www.fas.usda.gov/scripts/AttacheRep/default.asp">http://www.fas.usda.gov/scripts/AttacheRep/default.asp</a> The presence of biotech products in the UK is minimal. Large supermarket chains have 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 have also taken a non-GMO approach, as well as many restaurants and cafes.
Organic	According to The Soil Association, the UK organic category has expanded beyond its niche market origins, moved into the mainstream, and is now worth over BPS 2 billion (USD 4bn). Retail sales of organic products through organic box and mail order schemes and other direct routes increased from BPS 95 million in 2005 to BPS 146 million in 2006 - 53 per cent growth. Supermarket chains dominate retail sales of organic foods, accounting for an estimated 82 percent of sales by value. Organic product ranges now extend to a wide range of convenience and grocery items. The UK will continue to source imports to meet demand.
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. Organic, at least in the mind of the consumer, is also seen as a contributor to improved health.
Package Sizes	UK households are mainly comprised of 1-4 people. In addition, kitchens and refrigerators are small. Shopping is undertaken every couple of days, with perhaps a "large shop" every 2-3 weeks. US suppliers should consider this in determining export package size.
History & Culture	As in the US, there are major brands and products that UK consumers have grown up with day to day. British taste and product usage can differ greatly to American. Examples are chocolate, sodas and popcorn.

## 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: The UK: Food and Agricultural Import Regulations & Standards Country Report (FAIRS) and can be obtained from the FAS homepage [www.fas.usda.gov](http://www.fas.usda.gov) choose Countries, Market Reports, Attaché Reports, or for further information on EU policies, please see the following report: <http://www.fas.usda.gov/gainfiles/200707/146291677.doc>

## 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](http://www.hmrc.gov.uk).

The UK FAIRS Country report as mentioned above addresses UK import and inspection procedures; please obtain this report for further information.

## SECTION III. MARKET SECTOR STRUCTURE & TRENDS

The UK retail grocery market was worth £123.9 billion (\$234.2 billion) in 2006, an increase of 3.4 percent on 2005

Groceries account for 12.7 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 49 percent of retail spending

The Institute of Grocery Distribution (IGD) has estimated that the UK retail grocery market will grow at an average rate of 2.9 percent over the next five years. It is expected to be worth £138.2 billion (\$261.2 billion) by 2010, at current prices.

## Retail Sector

### Supermarket Chains

Four large supermarket chains dominate UK food retailing, and together they account for almost 75 percent of the market. Tesco is the market leader, by a sizeable margin. Tesco has 31.4 percent market share, followed by Asda/Wal-Mart (16.6 percent), Sainsbury's (15.7 percent) and Morrison's (11.1 percent). Other UK supermarket chains include Waitrose, Somerfield, Iceland, Aldi, Budgens, Netto and Lidl.

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

Retailer	Share %	Sales Growth % 2005/2006
Tesco	31.4	10.1
Asda/Wal-Mart	16.6	5.6
Sainsbury's	15.7	6.9
Morrisons	11.1	3.2
Somerfield	4.6	12.6

Waitrose	3.9	11.7
Aldi	2.5	15.3
Lidl	2.1	5.0
Iceland	1.6	4.9
Netto	0.7	4.9

*Source: TNS Data, market share summary, 12 weeks to October 8, 2006*

In general, each chain services a particular consumer base. For example, Tesco targets the middle market, providing both economy and up-scale products. Sainsbury's is pitched a little up-market of Tesco, with Asda/Wal-Mart pitched a little down-market of Tesco. Morrison's and Somerfield 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, Budgens, Netto and Lidl are all price-focused outlets.

As a result of town planning regulations, supermarkets in the UK are smaller than their counterparts in Germany or France. For example, Tesco and Sainsbury's stores are just 3,500m<sup>2</sup> (37,700 sq ft) on average. Planning restrictions have resulted in limited availability of suitable sites. This in turn has fueled a move back towards smaller stores by the large supermarket chains, and created a polarization between superstores and convenience stores formats. The major UK supermarket chains have also developed store formats that sit alongside gas forecourts. For example, Morrison's has a partnership with BP gas, Tesco with Exxon, and Sainsbury's with Shell.

The UK has one of the most advanced private label markets in the world (worth around \$100 billion). The UK's major supermarket chains dominate the private label market and on average 40-50 percent of products in their stores are private label. Originally, private label goods were a 'me too' copy of a branded product, but today they are often innovative. They give UK retailers the opportunity to diversify their product ranges and develop new revenue streams.

The Institute of Grocery Distribution (IGD) estimates that UK internet grocery sales are currently worth £1.6 billion (\$3 billion), just one percent of the total grocery market. However, IGD forecasts that on-line shopping will double between 2006 and 2011. Tesco is the only retailer to make on-line shopping profitable so far.

The UK has one of the most advanced private label markets (worth around \$100 billion), and leads developments in this sector throughout Europe. The UK's major supermarket chains dominate the private label market and on average 40-50 percent of their products are private label. Originally, a 'me too' copy of a branded product, private label foods today are often innovative. They give UK retailers the opportunity to diversify their product ranges and develop new revenue streams. The UK private label market is expected to show continued growth.

Product entry into the major UK supermarket chains is not easy to achieve. New direct suppliers are not necessarily encouraged since the cost of adding a supplier to the stock management, food safety and logistical systems is high. Most US food and drink products are supplied to UK retailers through UK importers. Importers provide a valuable service in undertaking regulatory checks and customs clearance procedures. A small proportion of US products are delivered direct to UK retailers. This route-to-market depends on the complexity of the product and the tenacity of the retailer in their sourcing. Opportunities

with major UK retailers exist for US products where there is a price advantage in product from US large manufacturing facilities or for product innovative by virtue of its concept or technology.

### Department Stores

Marks and Spencer (M&S) food halls continue to maintain successful business growth. Most M&S customers buy the majority of their food from other mainstream grocery retailers. They use 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 recently to other major UK cities such as Birmingham, Manchester and Leeds. This has increased the sale of US products sold to their food halls by UK importers. Other notable department stores stocking US products are Fortnum & Mason and Harrods. Department Store food halls provide an opportunity for U.S. specialty foods. There are a number of importers servicing this sector; importer information can be obtained from sending an e-mail to [aglondon@usda.gov](mailto:aglondon@usda.gov) specifying what your product is.

### Convenience Chains

The focus of these stores is mainly on well-known brands. They are located in the heart of town or in busy suburbs to provide convenience mainly to commuters during the day and families in the evening or at weekends. In the last couple of years the major supermarket chains have opened many smaller convenience type stores.

### Other Retailers

The UK has other outlets for US 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 at [www.fas.usda.gov](http://www.fas.usda.gov).

## **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 worth around \$70 billion in 2006. The \$70 billion foodservice market accounts for one third of all consumers food purchases.

The breakdown of market value by operator type is shown in the table below:

	Food Sales (£ Millions)	Share (%)
Restaurants	8,033	21.5
Fast Food	9,160	24.5
Pubs	5,724	15.3
Hotels	6,825	18.2
Leisure	2,921	7.8
Staff Catering	2,488	6.6
Health Care	854	2.3
Education	1,215	3.2
Services/Welfare	218	0.6
<b>Total</b>	<b>37,439</b>	<b>100.0</b>

Source: Horizons FS Limited, 2006

In 2006, there was an estimated 262,888 UK foodservice outlets operating nationwide. The breakdown by operator type is show in the table below:

	Number of Outlets	Share (%)
Restaurants	26,629	10.1
Fast Food	29,784	11.3
Pubs	50,989	19.4
Hotels	46,564	17.7
Leisure	19,234	7.3
Staff Catering	20,436	7.8
Health Care	31,577	12.0
Education	34,608	13.2
Services/Welfare	3,068	1.2
<b>Total</b>	<b>262,888</b>	<b>100.0</b>

Source: Horizons FS Limited, 2006

The foodservice market is the UK's fourth largest consumer market is the UK's fourth largest consumer market following retail, motoring and clothing and footwear. In 2005, 8.3% of every consumer's pound was spent on eating out. In 2005, 478 million meals were consumed in the workplace, this was the top outlet out of home. 434 million meals were consumed in restaurants & 410 million in pubs/bars. The amount spent on food & drink out of the home grew by 2.6% in 2005.

It is estimated that by 2025 the UK consumers will be spending more of their disposable income on "eating out" than they spend on food cooked at home.

### Supply Chain

The catering market is supplied in two main ways, either direct from a supplier or through an intermediary such as an importer or importer plus further distributor. Because there is a large number of small companies operating in the catering market, intermediaries skilled at fulfilling small orders efficiently play a crucial role in the distribution of products.

Wholesalers represent an avenue of further distribution. The wholesaler normally takes title of the goods (i.e. ownership) following the purchase from a supplier/importer and prior to resale to trade customers. Wholesalers provide a link between agriculture (for fresh food), manufacturing (for finished products) and the foodservice and retail sectors.

The UK's foodservice industry holds many avenues of opportunity for US 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 on the USDA website.

### **Food Processing**

The food and drink industry is the country's largest single employer, employing over 3.5 million people in the UK. Food retail is the largest consumer market, with food service the fourth largest. Food and drink is also the largest manufacturing industry in the UK, with an annual turnover over \$145 billion. Around 500,000 people across Britain are employed in jobs associated with food and drink manufacture and sales, accounting for 13% of total employment in the country.

In 2006 there were 6,657 food-manufacturing enterprises in the UK. As far as type of food production is concerned, there has been a switch from commodity products to further-processed and value-added lines. UK companies such as Unilever, Guinness and Grand Metropolitan are among the largest in Europe. Many US companies, like, Pepsico, Kellogg's, ADM, ConAgra and Cargill also have substantial interests in the UK.

As the UK is around 58.1 percent self-sufficient in all types of food and feed and 75 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. Consumer ready 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 not 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. 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 2006 (\$ million)	UK Imports From US 2006 (\$ million)	Average Annual US Import Growth (last 5 yrs)	US Import Tariff Rate	Key Constraints to Market Development	Market Attractiveness for USA
Fish and Seafood HS: 03	2,465	77.1	15%	0-22%	Highly fragmented market, domestic shortfall currently bridged by Baltic States	US #1 canned salmon supplier, developing interest in other products and species
Chocolate confectionery HS: 1806	1,157.5	9.8	13%	8-27%	Domestic & EU competition, low acceptance of American chocolate taste	British eat more chocolate than any other nationality, apart from the Swiss
Vegetables & Fruit prepared in Vinegar HS: 2001	70.5	1.7	34%	0-16%	Competition from Turkey, Netherlands and India	Food has long shelf life
Preserved fruit & nuts HS: 2008	433.7	17.3	11%	7-27%	Competition from EU + Thailand & South Africa	US nut butters perceived as high quality, exotic preserved fruits of interest for gift/specialty trade
Fruit & Vegetable Juice HS: 2009	857.2	7.1	4%	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	593.0	14.8	-3%	0-10%	Domestic & EU copy-cat products, Australia now also entering this market	US #4 supplier, UK wants authentic tex-mex, BBQ sauces, marinades & salad dressings
Soft drinks HS: 2202	840.4	9.6	9	0-10%	Domestic & EU competition, strong brands, market reaching saturation	New US concepts in beverages always attractive, e.g. functional drinks
Beer HS: 2203	678.7	1.9	-16%	0%	Domestic & EU competition, major brewers located in EU	US micro-brew beers, generally quirky beers with a story are attractive to a niche audience
Wine HS: 2204	4,256.2	233.67	-2%	18-25%	Competition from EU + Australia + Latin America. Figure shows a minus due to wine being shipped to Italy and then the UK.	UK #1 export market for US wine, California wine has 14% market share, other parts of US should benefit in future

Source: World Trade Atlas

**SECTION V. KEY CONTACTS AND FURTHER INFORMATION****Foreign Agricultural Service**

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Embassy of United States of America  
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**Commission of the European Communities**

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**United States Mission to the European Union**

Office of Agricultural Affairs

Organization chart: <http://useu.usmission.gov/agri/staff.html>

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<http://useu.usmission.gov/agri/foodsafety.html>

<http://useu.usmission.gov/agri/usda.html>

**UK Trade Associations****Institute of Grocery Distribution**

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**Fresh Produce Consortium**

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**British Frozen Food Federation**

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**British Health Food Manufacturer's Association**

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