

**Required Report:** Required - Public Distribution

**Date:** June 29, 2023

**Report Number:** UK2023-0018

## **Report Name:** Retail Foods

**Country:** United Kingdom

**Post:** London

**Report Category:** Retail Foods

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### **Report Highlights:**

The cost-of-living crisis dominates this report, highlighting the increased price of food faced by consumers in the UK. In April 2023, the UK had its second highest food inflation rate for 45 years, standing at 19.1 percent. As a result, the way in which consumers shop has changed including shopping less often and spending more on private label products. The biggest change is the shakeup of the “big four” supermarkets which has dominated the UK grocery market for years. In September 2022, Aldi, a discounter showed unprecedented growth entering the top four, pushing Morrison’s to number five. Healthy products, as well as vegetarian and plant-based products remain popular with consumers.

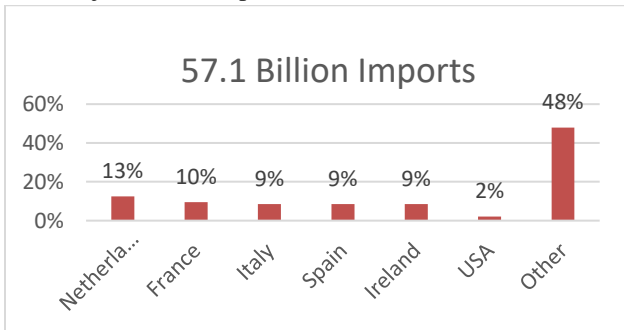
## Market Fact Sheet: United Kingdom

### Executive Summary:

According to the Office of National Statistics ([ONS](#)) data, the United Kingdom (UK) has a population of 67.1 million. It is a leading trading power and financial center and the third-largest economy in Europe, according to [CIA World Factbook](#). Agriculture is intensive, highly mechanized, and efficient by European standards, but accounts for less than one percent of the gross domestic product (GDP). While UK agriculture produces about 58 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 \$3.1 trillion GDP in 2022, the UK is the United States' fifth-largest market in the world for all goods and services. Demand for U.S. consumer-oriented food products continues to differentiate the UK from many of its European neighbors.

### Imports of Consumer-Oriented Products

According to Trade Data Monitor (TDM), in 2022, the UK imported consumer-oriented agricultural products worth \$57.1 billion, with the United States' market share at just over two percent or \$1.2 billion.



### Food Processing Industry:

According to the latest [Food and Drink Federation Factsheet](#), the food and drink sector is the single largest employer in the UK manufacturing sector. In 2022, around 468,000 people across the UK were employed in jobs associated with food and drink manufacturing, an increase of 3.4 percent from 2020. The food and drink manufacturing sector's output were valued at \$36 billion with an annual turnover of \$134 billion, up 4.2 and 4.8 percent, respectively.

### Food Retail Industry:

The food retail sector is saturated, highly consolidated, and competitive. The top four retail groups (see chart) together account for 65 percent of the market.

Independent stores continue to face strong competition from grocery retailers and online retailers. Online sales are predicted to increase to become the second fastest-growing channel post-2024, as rapid grocery deliveries between 30 minutes and an hour become increasingly popular. UK consumers are willing to try foods from other countries but expect quality products at a competitive price. Aldi has recently overtaken Morrisons to become the fourth-largest UK supermarket chain for the first time.

#### Quick Facts CY 2022 (\$1=£0.83)

##### Total Imports of Consumer-Oriented Products:

\$57.1 billion

##### UK's Top Consumer-Oriented Growth Products

- |                         |                       |
|-------------------------|-----------------------|
| 1) Eggs                 | 6) Bakery Goods       |
| 2) Coffee               | 7) Food Preparations  |
| 3) Poultry              | 8) Chocolate          |
| 4) Non-Alcoholic Bev    | 9) Processed Fruit    |
| 5) Processed Vegetables | 10) Condiments/Sauces |

##### Food Industry by Channels (USD billion) 2022

Food Industry Output - Turnover	134
UK Ag Total Exports to United States	2.9
UK Ag Total Imports from United States	2.5
Value of Grocery Retail Market	271
Value of Food Service Market	40

##### Top 10 Host Country Retailers

- |                |                     |
|----------------|---------------------|
| 1) Tesco       | 6) Lidl             |
| 2) Sainsbury's | 7) Cooperative      |
| 3) Asda        | 8) Waitrose         |
| 4) Aldi        | 9) Iceland          |
| 5) Morrisons   | 10) Marks & Spencer |

##### GDP/Population

Population (2021) (millions): 67.1 GDP (trillions): \$3.1  
GDP per capita: \$45,000

Sources: CIA World Factbook, TDM, Kantar Worldpanel, UK Government Statistics

Strength	Weakness
UK is one of the biggest markets in Europe with one of the highest per capita incomes globally	U.S. products face competition from tariff-free products from the EU and Free Trade Agreement (FTA) partners.
Opportunity	Challenge
Demand for sustainable, healthy, free-from, vegetarian, and convenience products are growing.	Higher cost-of-living causes consumers to spend less on non-essential items and switch to more private-label products.

## SECTION I. MARKET SUMMARY

As of June 2023, the UK cost-of-living crisis remains tough for consumers, with almost every essential cost considerably higher than in 2022. According to the Office of National Statistics ([ONS](#)), the increased price of food shopping is the main reason for higher living costs with 95 percent of households affected. This is therefore the biggest concern for the UK grocery industry.

In April 2023, [ONS](#) stated that two-thirds (68 percent) of adults in Great Britain were spending less on non-essentials items. The annual [inflation rate](#) for food and non-alcoholic drinks stands at 19.1 percent, slightly lower than the 19.2 percent in March 2023. This is the second highest food inflation in over 45 years. After a year of sharp increases in the price of food, it is anticipated that grocery price growth may have reached its peak, and that food prices will slowly start to fall.

Figures suggest that 25 percent of UK adults borrowed money in the past year to make ends meet, with more adults using credit cards for payments than in 2022. The conflict between Russia and Ukraine has been the primary driver behind the UK cost-of-living crisis, however, there are many other aspects which have impacted the crisis, including the Covid pandemic, supply chain issues, commodity prices and agriculture.

According to [Kantar](#), consumer grocery shopping habits markedly shifted since the pandemic. UK consumers shop less often, spend more on private label products, and join supermarket loyalty schemes for discounts. In May 2023, the average household made 16 trips to the supermarket per month, down from 18 trips prior to the pandemic, however, the amount spent in each shop has increased.

Almost 12 percent of UK grocery shopping is online, down from its peak of 15.4 percent in February 2021 during the height of the pandemic. This is, however, still considerably higher than pre-pandemic when it accounted for eight percent of grocery spending. Older people who took up online shopping during the pandemic have returned to shopping instore, however, the younger generation prefer to shop online. Deliver-to-door food subscriptions are also popular and growing; a wide range of models exist from local produce to pre-prepared meals.

According to [Kantar](#), in 2022, sales of supermarket private label products accounted for 54 percent of grocery sales, up from 45 percent in 2005. As food prices increased at their fastest rate in 45 years, it is one-way shoppers have found to reduce costs. Supermarkets have expanded their private label ranges offering different price points, including “saver” and “specialty” options. In 2014, in-store deals accounted for 40 percent of grocery spending, in 2023, they account for 25 percent of spending, as these types of offers decrease in line with the government’s healthier eating plan. Instead, shoppers are signing up to supermarket loyalty schemes to access discounts. The government is working on plans for a voluntary price cap on essential items such as bread and milk; however, the proposal has been criticized by retailers.

In June 2022, the [Institute of Grocery Distribution \(IGD\)](#) valued the UK retail grocery market at \$269 billion (£217 billion) and predicted an increase of 11.3 percent to \$298 billion (£241 billion) by 2027.

Discounters are expected to be the fastest growing channel between 2022 and 2027, with sales predicted to increase by 23.9 percent as consumers economize and look for both quality and value.

Consumers are choosing to support local businesses by shopping locally, with sales increasing 3.2 percent to \$56 billion in 2022. According to [Catering Insight](#), consumers conduct additional shopping trips to these shops for milk, bread, snack foods, and convenience meals. Mainstream grocery lines, such as confectionery, cereals, and baking mixes, are sold in independent convenience stores, which present an opportunity for U.S. products.

Health and well-being is a long-term trend; just under one third of food and drink are purchased for health reasons. However, with consumers becoming more price conscious, this is likely to decrease as people watch what they spend. Older shoppers are most concerned about their health and are likely to continue to buy products that are marketed as healthy. Health is high on the UK government agenda, with guidance actively encouraging citizens to eat healthier, reduce sugar and fat consumption, and cook with fresh ingredients. This increased consumer preferences for healthy foods.

UK consumers are buying more organic food. In 2022, according to the [Soil Association](#), the UK organic market achieved its 11th consecutive year of growth, increasing 1.6 percent to \$3.8 billion (£3.1 billion), the highest ever value for the UK organic market. The vegan and vegetarian diet trend continues to grow and highlights the importance of fruit and vegetables in the daily diet. In 2022, according to [Statista](#), 14 percent of the UK population followed a meat-free diet, including vegetarian (six percent), pescatarian (five percent), or vegan (three percent). One of the biggest trends is the move towards sustainable products. Consumers, including both vegetarians and non-vegetarians, are choosing to eat more plant-based or meat-alternative products to help the environment.

One of the biggest UK trends is sustainable food products. Consumers are more conscious about what they eat and the effect it has on the environment. With their food choices, these consumers want to feel that they are playing their part in reducing greenhouse gases and deforestation. Consumers want food sold by UK retailers to be produced more sustainably. Sustainability, climate change, and price are at the forefront of UK retailers' minds and part of their decision-making process.

**Packaging Regulations:** In recent years, there has been a rise in public awareness of the negative environmental impact of plastic pollution. Plastic packaging of food makes up a significant proportion of the UK's plastic waste. Manufacturers and retailers are exploring alternatives to single-use plastics, particularly in relation to fresh produce, including increasing the availability of loose items in supermarkets. The UK Government has a strong green agenda that brought in legislation to reduce single-use plastics. In April 2022, a new [Plastic Packaging Tax](#) came into effect which applies to plastic packaging manufactured in, or imported into, the UK that does not contain at least 30 percent recycled plastic. UK retailers joined together to sign up to the [UK Plastics Pact](#), a voluntary initiative with targets to reduce the use of plastics, and in February 2022, announced that by 2025 the vast majority of fresh fruit and vegetables will be sold loose. Further information on Plastic Packing Tax can be found [here](#) and further information on the UK Plastics Pact is found [here](#).

On October 1, 2023, the UK government was due to introduce legislation to restrict the marketing of food products that are high in fat, sugar, and salt ([HFSS](#)) by [volume price](#), meaning that multibuy offers would no longer be allowed. This regulation has been delayed several times with the government

announcing on [June 17, 2023](#), that it will yet again be delayed until October 2025. This will give the government the opportunity to review the restrictions on consumers and businesses considering the unprecedented global economic situation after receiving resistance with many feeling that it unfairly affects those with lower incomes. In October 2022, a restriction of HFSS products by location came into force. Meaning that food falling into this category can no longer be sold at key store locations, such as store entrances, aisle ends, and checkouts. This will bring a new challenge to food manufacturers as companies reformulate their products to avoid these restrictions. These regulations do not currently apply to convenience stores, creating an advantage for U.S. companies selling products that fall into this category. The HFSS regulations will extend to the ban of marketing and promotion of these products starting in 2025.

### Key Market Drivers and Consumption Trends

- **Health and Wellness Products:** the aging population and increased health consciousness of consumers is fueling demand for health and wellness products.
- **Convenience Ready Meals:** increasingly high-paced society and rising number of single households is driving demand for convenient ready-to-eat meals, desserts, and baking mixes.
- **Free-From Products:** products free from gluten, dairy, or lactose are increasingly popular with shoppers.
- **Locally Grown:** “Buy British” campaigns are attracting UK consumers to purchase locally grown products and to support local farmers.
- **Sustainability and Eco-Friendly Products:** Some consumers view their purchasing decisions as political or lifestyle statements. Traceability and information about production methods are required frequently.
- **Vegan & Vegetarianism:** UK consumers are choosing to become vegan, vegetarian, or flexitarian to be more sustainable and help the environment. Consumers are increasingly concerned about animal welfare.
- **Ethnic Foods:** the UK has an ethnically diverse population, which fuels demand for a wide range of cuisines.
- **Fair Trade and Organic Products:** are becoming increasingly popular, as they are perceived as healthier.
- **Private Label:** due to increased cost-of-living, consumers are buying more private-label products to save money.

**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 of importing from the United States.	The UK has well-established brands for mainstream products. Brand-building and marketing costs are substantial.
The U.S. has an opportunity to promote products that focus on the environment, sustainability, and health.	Trade barriers imposed on certain U.S. products, including meat and poultry. U.S. agriculture has regular negative portrayal in the UK media

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The country is English speaking and therefore an easier gateway into the rest of Europe for U.S. exporters.

A free trade agreement between the UK and EU means EU competitors do not pay import duty on goods to the UK. U.S. exporters face up to 25 percent import duty, depending on the product.

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, such as French cheeses, Spanish citrus, and Italian pasta.

Price is a challenge due to higher shipping costs and tariffs faced by U.S. suppliers.

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Source: FAS London

## SECTION II. ROAD MAP FOR MARKET ENTRY

### Entry Strategy

Company's first needs to decide the market sector they wish to penetrate and whether products will be private label or branded. Food importation is a specialized business with importers playing a pivotal role in navigating the hurdles of UK food law. It is much harder to supply UK retailers directly. Importers carry a large variety of products. Many importers of non-frozen and chilled foods have in-house distribution networks and warehousing facilities, while smaller importers contract out. Many fresh produce importers have temperature-controlled-atmosphere warehousing facilities, and almost all importers of frozen and chilled foods contract out to specialized storage, handling, and distribution companies. The terms and lengths of association between the U.S. company and the UK importer are normally established by contract.

Some of the largest importers will only consider a product if it has large volume potential in the UK supermarket chains and is backed by substantial marketing and financial support. Others specialize entirely in independent grocer or food service distribution. Costs vary widely, too. Some importers may ask for a start-up fee, some are commission-only agents, and others seek a fixed fee that switches to commission when sales reach a target level. A full brokerage rate ranges between 17 and 25 percent. Large U.S. companies with substantial financial backing may be able to work with an importer to supply the UK supermarket chains immediately upon market entry. For small and medium sized U.S. companies, it is normal to work with an importer to gain product listings in department store food halls, delicatessens, and independent retailers first. Once a sales volume and record of accomplishment has been established, it is then possible for the importer to attempt listings in smaller retail chains, with to the aim of ultimately supplying the major supermarket chains. If a U.S. company is looking to bring a brand to the UK, the retailers expect that they will support the brand financially.

A U.S. exporter needs to understand a UK importer's distribution capacity and ensure that the UK importer can supply the retail outlets that best fit the appropriate UK consumer base. Market entry to the UK requires substantial homework on the part of the U.S. exporting company to ensure that all import regulations and labeling laws are met. These are covered in the [Food and Agricultural Importer Regulations \(FAIRS\) Report](#).

Once U.S. companies have acquired this background information, they may consider attending or visiting one of Europe's [USDA-endorsed trade shows](#). They serve as a springboard into the market, helping companies to establish new trade contacts and gauge product interest. The [International Food and Drink Event](#), a USDA-endorsed tradeshow, will take place in London from March 25 to 27, 2024. It

is the UK’s largest food trade show and includes six shows in one. If you would like information about this show, please send an email to [aglondon@usda.gov](mailto:aglondon@usda.gov).

U.S. exporters can also contact their respective [U.S. State Regional Trade Groups \(SRTG\)](#), their [Commodity Cooperator Group](#), and their state’s Department of Agriculture to obtain additional support. SRTGs are non-profit trade development organizations that help U.S. food producers and processors to enter overseas markets. They are funded by USDA/FAS and private industry to conduct promotional activities that increase exports of U.S. high-value food and agricultural products. The [U.S. Agricultural Export Development Council](#) is composed of U.S. commodity trade associations and other organizations with an interest in promoting U.S. agricultural exports. They regularly organize reverse trade missions, often around trade shows or other events. These are excellent platforms for U.S. suppliers to meet foreign buyers.

### Market Structure

According to the latest data from the [Office of National Statistics](#), total consumer spending on food, drink, and eating out increased by 12.3 percent in 2022 to \$298 billion (£240 billion) returning to pre-pandemic levels. Expenditure on food and non-alcoholic drinks decreased by 0.8 percent while alcoholic drinks rose by 20.3 percent and eating out by 39.7 percent reflecting the effects of the pandemic and the emergence from lockdown measures.

### Profiles of Different Food Retailers in the United Kingdom

Retailer Name and Outlet Type	No. of Outlets (2023)	Market Share (May 2023)	Website
<b>Tesco</b> (Mid-range supermarket), Supermarkets & Express stores	4,169	27.1%	<a href="http://www.tesco.com">www.tesco.com</a>
<b>Sainsbury’s</b> (Mid-range supermarket) Supermarkets & convenience stores.	1,400	14.8%	<a href="http://www.sainsburys.co.uk">www.sainsburys.co.uk</a>
<b>Asda/Wal-Mart</b> (Mid-range)	633	13.9%	<a href="http://www.asda.co.uk">www.asda.co.uk</a>
<b>Aldi</b> (Discounter supermarket)	990	10.1%	<a href="http://www.aldi.co.uk">www.aldi.co.uk</a>
<b>Morrisons</b> (Mid-range supermarket)	497	8.7%	<a href="http://www.morrisons.co.uk">www.morrisons.co.uk</a>
<b>Lidl</b> (Discounter supermarket)	960	7.7%	<a href="http://www.lidl.co.uk">www.lidl.co.uk</a>
<b>Co-op</b> (Mid-range supermarket, primarily British products)	3,889	5.7%	<a href="http://www.coop.co.uk">www.coop.co.uk</a>
<b>Waitrose</b> (Upscale supermarket)	329	4.6%	<a href="http://www.waitrose.co.uk">www.waitrose.co.uk</a>
<b>Iceland</b>	900	2.3%	<a href="https://about.iceland.co.uk/">https://about.iceland.co.uk/</a>
<b>Ocado</b> (online)	N/A	1.7%	<a href="http://www.ocado.co.uk">www.ocado.co.uk</a>
<b>Whole Foods Market</b> (Very upscale supermarket)	1 main store and 6 smaller stores	n/a	<a href="https://www.wholefoodsmarket.co.uk/">https://www.wholefoodsmarket.co.uk/</a>
<b>Costco Wholesale</b> (Warehouse – Membership)	29	n/a	<a href="http://www.costco.co.uk">www.costco.co.uk</a>

Source: Supermarket websites & [Kantar Worldpanel](#)

### Retail Outlets

[Kantar’s](#) latest statistics show that five supermarket chains dominate UK food retailing, accounting for 74.6 percent of the market. The biggest change is that in September 2022, Aldi, a discounter, entered the

top four supermarket chains, pushing Morrisons to number five. This is unprecedented and shows the growing influence of discounter chains, with Aldi and Lidl now having a combined market share of 17.8 percent. Discounters show no signs of stopping, with plans to open hundreds of more stores in the next two years. Tesco is the market leader, with 27.1 percent market share, followed by Sainsbury's with 14.8 percent, Asda with 13.9 percent, Aldi with 10.1 percent, and Morrison's has 8.7 percent. Other UK supermarket chains include Lidl, The Cooperative, Waitrose, Iceland, and Marks and Spencer.

In addition to the above retail avenues, department store "food halls" and delicatessens present opportunities for listings of U.S. products. Some London-based department stores, including [Harvey Nichols](#) and [Selfridges](#), have expanded to other major UK cities like Birmingham, Manchester, and Leeds. Other notable department stores stocking U.S. products are [Fortnum and Mason](#) and [Harrods](#). Key London delicatessens for U.S. products include [Partridges](#) in Kensington and [Panzers](#) in St. John's Wood. Finally, [Whole Foods Market](#) has one flagship store and six smaller stores, and [Costco](#) has 29 UK stores. These stores are great advocates for U.S. products and sell a wide range. They offer U.S. companies a good starting point when breaking into the UK market.

**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. According to [Kantar](#), in 2022, sales of private-label products set a new record, increasing by 14.1 percent and now accounts for 54.7 percent of grocery sales, and 62.6 percent by volume. The reasons for this are squeezed incomes caused by the cost-of-living crisis, record high food inflation, with households forced to making savings wherever possible. Originally, private-label goods were a copy of a branded product, but today they are innovative and marketed as a premium or high-quality brand. They give retailers the opportunity to diversify their product ranges and develop new revenue streams.

**Technology Innovation among Retailers** – Retailers have launched apps that hold shopping lists, offer digital coupons, integrate with loyalty programs, and allow you to scan and buy your groceries in the app. Tesco, Sainsbury's, Asda, Waitrose, Marks and Spencer, and Morrisons all offer "click-and-collect" services which allow consumers to buy products online and collect them in store; discounters Aldi and Lidl are trialing the service in some stores.

**Convenience Stores or the "C-Sector"** - The UK's convenience store market is highly fragmented, with many retail operators. Store operators may be divided into several types: grocery stores, and specialist stores, such as newsagents and greengrocers. During the pandemic, convenience stores received a boom in sales, with more consumers shopping locally, and have since remained stable. However, these stores tend to charge more, and with the cost-of-living crisis, they need to be wary of consumers switching to alternative stores for cheaper alternatives.

### SECTION III. COMPETITION

The EU is the main competitor for U.S. consumer-oriented food. According to the [Office of National Statistics](#), the EU supplies 23 percent of food consumed in the UK. EU food exporters have relatively low transportation costs and fast delivery times. Their products do not face import duties, nor do they face major ingredient or labeling changes. Africa is the largest non-EU supplier to the UK, with five percent of all UK food and drink imports, followed by North America, and Asia both with four percent



each. The three largest imported commodity groups by value were fruit and vegetables, meat, and beverages.

### Overall Competitive Situation for Consumer-Oriented Products (2022)

Product Category Total UK Import	Main Suppliers in Percentage	Strengths of Key Supply Countries	Advantages and Disadvantages of Local Suppliers
<b>Wine &amp; Beer</b> (HS 2203, 2204, 2205, 2206) <b>USD 5.8 billion</b>	1. France - 31.8% 2. Italy – 20.8% 3. Spain – 8.0% <b>8. USA – 3.9%</b>	Proximity, reputation, climatic conditions for wine growing.	Limited wine grown in the UK, therefore necessity to import.
<b>Tree Nuts</b> (HS 0801 +0802 +200819) <b>USD 565 million</b>	1. <b>USA – 37.0%</b> 2. Vietnam – 23.4% 3. China – 5.3%	USA is the leading supplier of almonds, walnuts, pistachios, and hazelnuts.	Growing demand from the snack industry. Nuts benefit from their healthy reputation.
<b>Food Preparations</b> (HS 210690) <b>USD 1.7 billion</b>	1. Germany – 18.6% 2. Denmark – 12.3% 3. Netherlands – 10.2% <b>5. USA –6.6%</b>	Proximity and availability.	Strong domestic food industry.
<b>Distilled Spirits</b> (HS 2208) <b>USD 1.2 billion</b>	1. France – 21.2% <b>2. USA – 17.3%</b> 3. Italy – 10.4%	Proximity to the UK.	Scotland is a big producer of whisky and is competition for the United States. France exports brandy and Italy liqueurs.
<b>Fish &amp; Seafood</b> (HS 03 + HS 16) <b>USD 8.2 billion</b>	1. Norway – 10.2% 2. Thailand– 9.2% 3. Poland – 8.4% <b>20. USA – 1.5%</b>	USA is the third largest supplier of Alaska Pollock fillets, used as an alternative to cod or in fish fingers.	Tradition in seafood trading and processing. Fish is popular.
<b>Sauces and Preparations</b> (HS 2103) <b>USD 1.1 billion</b>	1. Netherlands – 22.9% 2. Italy – 12.3% 3. Germany – 8.5% <b>11. USA –3.1%</b>	Proximity and availability. USA is well known as a supplier of BBQ and hot sauces.	Strong domestic food industry.
<b>Sweet potatoes</b> (HS071420) <b>USD 94.3 million</b>	<b>1. USA – 42.8%</b> 2. Egypt – 20.7% 3. China – 16.2%	The United States is the largest exporter of sweet potatoes to the UK.	Supermarkets sell fresh and processed sweet potatoes
<b>Peanuts</b> (HS 1202) <b>USD 178.9 million</b>	1. Argentina – 35.3% <b>2. USA – 24.2%</b> 3. Brazil – 13.6%	Until 2022, U.S. had 25 percent import duty giving Argentina the advantage.	Not grown in the UK. Demand from snack food industry.

(Source: TDM)

#### IV. BEST PRODUCT PROSPECTS

**Products in the Market That Have Good Sales Potential:** **Processed Products:** health food, mainstream grocery, and snack foods. **Dried and Processed Fruit:** cranberries, dried cherries, prunes, raisins, and wild berries. **Nuts:** almonds, peanuts, pecans, pistachios, and walnuts. **Fish and Seafood:** cod, pollack, salmon, and other fish products. **Fresh Fruit and Vegetables:** apples, grapefruit, sweet potatoes, and table grapes. **Meat:** hormone-free beef and pork products. **Drinks:** craft beer, spirits, wine, and low-alcohol products. **Food Ingredients** and **Wood pellets** and other waste/residues for renewable fuels.

**Products Not Present Because They Face Significant Barriers:** **Food additives** not approved by the UK, **Red Meat and Meat Products** produced with growth promotants, most **Poultry and Eggs** and **Genetically Modified Products** that are not approved in the UK.

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

Product Category	U.S. Exports to UK 2022 (\$ million)	% Change 2021-22
Wine	166.4	-21.6
Tree Nuts	161.8	-6.1
Distilled Spirits	158.6	+48.7
Food Preparations	118.9	-21.9
Bakery Goods, Cereals, and Pasta	51.0	+6.3
Fresh Vegetables	50.2	-20.7
Non-Alcoholic Beverages, Exc. Juices	42.0	+0.7
Dairy Products	37.0	+25.0
Chocolate & Cocoa Products	34.1	+22.9
Processed Fruit	31.0	-13.7
Condiments & Sauces	29.0	-1.7
Confectionery	28.0	-21.9
Processed Vegetables	27.4	+13.5
Other Consumer Oriented	18.3	+24.3
Eggs and Products	17.3	-29.3
Dog & Cat Food	9.7	-5.5
Fruit & Vegetable Juices	8.7	+68.0
Beer	6.4	-49.1
Fresh Fruit	4.9	-46.6
Beef & Beef Products	4.3	+70.7
Pork & Pork Products	1.1	-71.7
Poultry Meat	0.3	+29.2

Source: [BICO Report/U.S. Bureau of the Census Trade Data](#)

## V. KEY CONTACTS AND FURTHER INFORMATION

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

United States Department of Agriculture (USDA), Embassy of the United States of America 33 Nine Elms Lane, London SW11 7US, Tel: +44 20 7891 3313 Email: [AgLondon@usda.gov](mailto:AgLondon@usda.gov)

Please review and follow FAS London's social media sites:

Twitter: [@USagricultureUK](https://twitter.com/USagricultureUK), Instagram: [@SavortheStates](https://www.instagram.com/SavortheStates), Website: [www.savorthestates.org](http://www.savorthestates.org) and [LinkedIn](#) account.

FAS London publishes other market and commodity reports available through the Global Agricultural Information Network (GAIN) at <https://gain.fas.usda.gov/#/home>

Further information on the UK retail grocery sector is available from the British Retail Consortium or the Institute of Grocery Distribution.

**British Retail Consortium (BRC)**, Tel: +44 20 7854 8900 Website: [www.brc.org.uk](http://www.brc.org.uk)

The British Retail Consortium is the lead trade association representing the entire range of retailers from large multiples and department stores through to independents.

**Institute of Grocery Distribution (IGD)**, Tel: +44 1923 857141 E-Mail: [igd@igd.com](mailto:igd@igd.com) Website: [www.igd.com](http://www.igd.com) The IGD is the UK trade association for information about the food and grocery chain. One service offered is the Retail Analysis - [www.igd.com/analysis](http://www.igd.com/analysis) .

### Attachments:

No Attachments