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**Report Highlights:**

Four supermarket chains hold over 66 percent market share of the UK grocery sector. This report provides an overview of the UK retail outlets and guidance on how best to place U.S. products in the UK market. It also explains how COVID-19 has impacted the market and how consumer shopping habits have changed. Online grocery shopping has boomed and now accounts for 11.5 percent of all grocery sales. This sector has attracted more new shoppers in 2020 than it has in the previous five years combined.

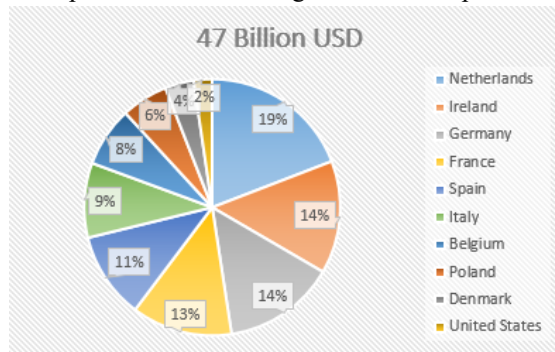
## Market Fact Sheet: United Kingdom

### Executive Summary

The UK, a leading trading power and financial center, is the third largest economy in Europe. Agriculture is intensive, highly mechanized, and efficient by European standards but, represents less than one percent of the Gross Domestic Product (GDP). While UK agriculture produces about 60 percent of the country's food needs with less than two percent of the labor force, the UK is heavily reliant on imports to meet the varied demands of the UK consumer who expects year-round availability of all food products. The UK is very receptive to goods and services from the United States. With its \$2.91 trillion GDP in 2019, the UK is the United States' largest European market and fifth largest in the world for all goods. Consumer-oriented products remain the most important sector for U.S. agriculture, amounting to \$970 million in 2019. Demand for U.S. consumer-oriented food products continues to differentiate the UK from many of its European neighbors. The UK is the 13th largest market in the world for U.S. consumer-oriented products.

### Imports of Consumer-Oriented Products

In 2019, the United Kingdom imported consumer-oriented agricultural products worth \$47.0 billion, with the top nine countries being from the European Union.



### Food Processing Industry

The food and drink sector is the largest single employer in the UK manufacturing sector. Food and drink is also the largest manufacturing industry in the UK, with an annual turnover in 2019 of \$126 billion (£105 billion). Around 430,000 people across the UK are employed in jobs associated with food and drink manufacture and sales. Around 106,000 of these workers are of EU nationality, amounting to about a quarter of the UK workforce.

### Food Retail Industry

The sector is saturated, highly consolidated, and competitive. The top five retail groups (see chart) together account for 74 percent of the market. Independent stores continue to face strong competition from modern grocery retailers. Online food

sales are showing tremendous growth, with the sector being valued at \$15.2 billion (£12.7 billion) in 2019. UK consumers are willing to try foods from other countries but expect quality products at a competitive price.

### Quick Facts CY 2019

#### Imports of Consumer-Oriented Products -\$49.0 billion

#### Top 10 Consumer-Oriented Growth Products in UK

- |                         |                    |
|-------------------------|--------------------|
| 1) Meat & Fish Extracts | 2) Lactose Syrup   |
| 3) Edible Fats          | 4) Maple Syrup     |
| 5) Chewing Gum          | 6) Pasta           |
| 7) Flavorings           | 8) Baby Food       |
| 9) Peanut Butter        | 10) Dog & Cat Food |

#### Food Industry by Channels (USD billion) 2019

UK Agriculture and Related Imports from United States	3.0
UK Food Exports to the United States – Agricultural Total	1.0
UK Food Imports from United States – Agricultural Total	1.4
Retail	261.0
Food Service	68.2

#### Top 10 Host Country Retailers

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

#### GDP/Population

Population (millions): 65.7    GDP (trillions USD): 2.91  
 GDP per capita (USD): 42,900

### Strengths/Weaknesses/Opportunities/Challenges

Strengths	Weaknesses
The UK is one of the biggest markets in Europe with one of the highest per capita income in the world.	U.S. exporters face competition from tariff-free products from other EU member states and FTA partners.
Opportunities	Threats
Speaking the same language, the UK's special relationship with the United States and its products and the potential of a free trade agreement make the UK an attractive market.	EU's focus on SPS-related trade barriers (beef, poultry, biotech) in combination with the UK's strict approach to import controls, creates potential for increased number of trade barriers

## **I. Market Summary**

The UK grocery sector is one of the most sophisticated in the world as many countries observe how operations are run in the UK. The UK was one of the first to pioneer the Click and Collect and online grocery shopping methods. The four leading supermarket chains compete fiercely for customers and there is a fast-growing number of discount chains. Within the UK retail sector, grocery retailing continues to record the biggest growth driven by state of the art retailers. Convenience stores, discounters and online grocery retailing are the formats seeing the strongest expansion, with major chains opening smaller stores in city and town centers while limiting large-format outlets in out-of-town locations.

2020 will be remembered for many years to come. Coronavirus has brought devastation to some areas of the market, but financial gains for others. The grocery sector is one sector that has flourished during the last few months. The ways in which people shop have changed in the past few months and it will likely continue this way for the foreseeable future. This has included consumers reverting to one large shop per week, choosing only one retailer and experiencing online grocery shopping for the first time.

Until February 2020, the grocery sector continued to flourish, with battles amongst the top food retailers to provide the lowest prices and to achieve the biggest market share. In March 2020, coronavirus swept across the UK and brought panic-buying and lockdown measures. Take-home grocery sales saw growth at the fastest rate since records began in 1994. At the same time, UK shopping habits changed and Brits adapted their lifestyles to adapt to the restrictions. Shoppers' priorities have changed since the beginning of the crisis. At the time of the writing, even though the virus is not as bad as it was a couple of months ago, people are increasingly deciding where to shop based on factors such as proximity, cleanliness, and crowds. With shoppers staying closer to home and looking to avoid queues at large supermarkets, smaller and independent stores have seen an increase in footfall.

Online shopping has been increasing year on year; however, Coronavirus has fueled this trend even further and it now accounts for 11.5 percent of all grocery sales. Online grocery shopping gained more ground and attracted more new shoppers in 2020 than it has in the previous five years combined. Online delivery company Ocado has also seen sales rise by 32.5 percent in the last four months while its market share reached a new high of 1.6 percent, up from 1.3 percent last year.

Sales at independent supermarkets were up 63 percent in the 12 weeks to May 17, 2020, with the sector reaching a market share of 2.5 percent, the biggest since 2009. This is great news for U.S. products, as many mainstream grocery lines such as confectionery, cereals, baking mixes etc. are sold in the independent stores.

With more time spent at home and with children to entertain, there has also been an increase in home baking, which is especially good for U.S. dried fruit and nut product imports. More consumers are getting used to buying wine and beer from online retailers, and it is likely that they will build relationships with the sites and choose to continue with this way of purchasing in the future rather than reverting to the supermarkets or high-end wine shops that don't have the wide range of products.

The UK retail grocery market sector was valued at \$232.3 billion (£193.6 billion) in September 2019, an increase of 1.7 percent on 2018. The Institute of Grocery Distribution (IGD) estimates that the UK grocery market will be worth \$261.0 billion (£217.7 billion) in 2024; a 12.5 percent increase on 2019.

Online grocery shopping will be the fastest growing channel and is expected to increase 41 percent over the next five years. By 2024, discounters will be worth \$41.6 billion (£34.3 billion) and convenience stores will remain the third-fastest growing sector with sales increasing from \$49.6 billion (£41.4 billion) in 2019 to \$57.8 billion (£48.2 billion) by 2024. Click and Collect sales will continue to increase rapidly. Discounters will continue to be the fastest growing channel as both quality and value are recognized by consumers. By 2024, they will claim 40 percent of every dollar (£4.00 in every £10.00) spent on grocery items. In addition, other stores such as B&M, Home Bargains, and Poundland continue to build up their grocery sections.

The latest research from Mintel reveals the online grocery market in the UK is forecast to grow by 33 percent in 2020 to reach an estimated value of £16.8 billion, up from £12.7 billion in 2019. This phenomenal rise follows four consecutive years of slowing growth: in 2019, growth fell to a historic low of just 2.9 percent.

Food prices had been decreasing in recent years due to the success of the discounters and competition. The discounters have continued to gain market share and with increased buying power, they have pledged to keep prices low. However, in recent months, prices have risen by nearly 20 percent, especially in the fresh produce categories. It is unknown at this point if they will remain at these prices or if they will drop again once things return to normal.

In the last few years, the UK has witnessed a remarkable shift in how and where consumers buy their food, with the discounters and online shopping being the winners. The UK convenience sector has been thriving for the last couple of years as shoppers respond positively to the greater choice of high quality local stores helping them shop a little at a time but often. All of the major food retailers are increasing their convenience store openings. This year the sector is expected to grow eight percent to \$53.6 billion (£47.7 billion.), up 2.6 percent from 2019.

Sales through larger format stores such as hypermarkets and superstores also have a more positive outlook as more investment is made into creating a big store experience for shoppers and is now key for consumers wanting a one stop shop for as many items as possible.

### **Key market drivers and consumption trends**

- Aging population and increased health consciousness of consumers is fueling the demand for health and wellness products, as well as functional food products.
- Increasingly high-paced society and the rising number of single households are driving the demand for convenient ready-to-eat meals, desserts, and baking mixes.
- Ethnic foods, health and super foods, “free from” products (e.g. gluten or lactose free), and locally grown are further trends that attract more and more UK consumers.
- Increasing share of consumers who have concern for animal welfare and who view their purchasing decision as a political or lifestyle statement.
- Consumers increasingly require traceability and information about production methods.
- Fair trade and organic products are becoming increasingly popular.

**Table 1: Advantages and Challenges**

<b>Advantages</b>	<b>Challenges</b>
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 a large number of specialty importers, capable and interested in importing from the United States.	The UK has well-established brands for mainstream products. Brand-building and marketing costs are substantial.
U.S. products are viewed by UK consumers as affordable.	U.S. poultry must not be treated with antimicrobials. All U.S. beef products must come from non-hormone treated cattle.
The country is English speaking and is therefore an easier gateway into the rest of Europe for U.S. exporters.	EU competitors do not pay import duty on goods to the UK. The United States pays 0-25 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, e.g. French cheeses, Spanish citrus, Italian pasta, South African produce. Anti U.S. lobby on food products has intensified with U.S.– UK trade agreement talks

Source: FAS London

## **II. Road Map for Market Entry**

The first thing a U.S. company needs to decide is what market sector they are looking to penetrate and whether their products will be private label or branded. For many years, importers have been key to doing business in the UK. Food importing is a specialized business, and an importer plays a pivotal role in navigating the hurdles of UK/EU food law. It is much harder to supply UK retailers directly. That said, with retailers trying to keep prices as low as possible and by using importers means adding 20-30 percent additional costs to the products, some are now looking to source directly from suppliers.

Importers normally 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 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 foreign 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 may seek a fixed fee that switches to commission when sales reach a target level. A full brokerage rate may range anywhere between 17 and 25 percent. Marketing costs from FOB level to retail may include some or all of the following: sea/air freight costs; insurance costs; import duty/value added tax/excise duty (if applicable); customs entry and clearance; handling charge to importer (can be a small charge deducted from wholesale price);

packaging and labeling; overheads, wastage, and shrinkage allowance; and mark-up by supermarket retailer (35-70 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/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 a view to ultimately supplying the four key 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. Many retailers still demand [BRC](#) or [IFS](#) accreditation for listing brands to protect themselves in case there are issues concerning the brand. If a U.S. company wants to penetrate elements of food service, convenience, or specialty grocery sectors where private label is not as strong, the financial support may not be as great.

In choosing a UK importer, it is essential to take into account the retail outlets to which they currently supply. 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/EU 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, available by emailing: [aglondon@fas.usda.gov](mailto:aglondon@fas.usda.gov). FAS GAIN Reports are good sources for country specific information: <http://gain.fas.usda.gov>.

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 interests. Although the UK does not have the huge shows that other European countries host, if you are specifically targeting the UK market, please send an email to Post who will be able to provide with a list of relevant shows.

U.S. exporters can also contact their respective U.S. State Regional Trade Groups (SRTG), their Commodity Cooperator Group, and their state Department of Agriculture to obtain additional support. **State Regional Trade Groups (SRTG)** 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 the private industry. They carry out promotional activities to increase exports of U.S. high-value food and agricultural products. For more information, contact the SRTG responsible for your state: <https://www.fas.usda.gov/state-regional-trade-groups>. The **U.S. Agricultural Export Development Council** is composed of U.S. commodity trade associations and other organizations, in addition to the SRTGs, with an interest in promoting U.S. agricultural exports. For an overview and additional information on the various Commodity Groups, you can go to [www.usaedc.org](http://www.usaedc.org). The [Commodity Cooperator Groups](#) regularly organize (reverse) trade missions, often organized around trade shows or other events. These also are excellent platforms for U.S. suppliers of food ingredients to meet with foreign buyers.

## Market Structure

The UK grocery market was valued at \$232.3 billion (£193.6 billion) in September 2019. This is an increase of 1.7 percent over 2018. According to data from the Office of National Statistics, the average

UK household spends \$3,868 (£3,224) on groceries and \$1,897 (£1,581) on restaurants and takeaways every year. As a result, in 2019 UK households spent 16 percent of their budgets on food and non-alcoholic drinks. Another 2.9 percent of budgets went to alcohol. Of this groceries account for 11 percent of total household spending in the UK, making it the third largest area of expenditure, following housing and transport. On average Brits conduct 24 grocery shopping trips per month. There are 87,141 grocery stores in the UK.

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

Retailer Name and Outlet Type	No. of Outlets (2019)	Market Share (May 2020)	Website
<b>Tesco</b> (Supermarket) Hypermarkets, Supermarkets & Express stores.	3,961	26.9%	<a href="http://www.tesco.com">www.tesco.com</a>
<b>Sainsbury's</b> (Supermarket) Supermarkets & convenience stores.	1,428	15.0%	<a href="http://www.sainsburys.co.uk">www.sainsburys.co.uk</a>
<b>Asda/Wal-Mart</b> (Supermarket)	631	14.1%	<a href="http://www.asda.co.uk">www.asda.co.uk</a>
<b>Morrison's</b> (Supermarket)	494	10.0%	<a href="http://www.morrisons.co.uk">www.morrisons.co.uk</a>
<b>Aldi</b> (Discounter)	870	7.7%	<a href="http://www.aldi.co.uk">www.aldi.co.uk</a>
<b>Coop</b>	4,022	7.0%	<a href="http://www.coop.co.uk">www.coop.co.uk</a>
<b>Lidl</b>	760	5.9%	<a href="http://www.lidl.co.uk">www.lidl.co.uk</a>
<b>Waitrose</b> (Upscale supermarket)	338	5.0%	<a href="http://www.waitrose.co.uk">www.waitrose.co.uk</a>
<b>Whole Foods Market</b>	1 main store and 6 smaller stores	n/a	<a href="http://www.wholefoodsmarket.com/stores/list/uk">www.wholefoodsmarket.com/stores/list/uk</a>
<b>Costco Wholesale</b> (Warehouse – Membership)	28	n/a	<a href="http://www.costco.co.uk">www.costco.co.uk</a>

Source: Supermarket websites & Kantar Worldpanel

Four supermarket chains dominate UK food retailing, accounting for 66 percent of the market. Tesco is the market leader, with 26.9 percent market share, followed by Sainsbury's with 15 percent, Asda with 14.1 percent each and Morrison's with 10.0 percent. Other UK supermarket chains include Aldi, The Coop, Waitrose, Lidl, and Iceland.

**Discounters** - The discounters Aldi and Lidl continue to gain market share. In the 12 weeks ending May 17, 2020, the discounters combined market share reached 13.6 percent. The discounters show no signs of stopping with plans to open hundreds of more stores between them in the next two years.

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.

**Internet or Online Shopping** - According to Mintel, the value of the UK online grocery market in 2019 was valued at \$15.2 billion (£12.7 billion); however, in 2020, it is forecast to grow by 33 percent to reach an estimated value of \$ 20.1 billion (£16.8 billion). This is as a result of a dramatic change in

online shopping habits over the COVID-19 lockdown period. Half of all Brits have tried to limit the time they spend in-store, while a further nine percent have used click-and-collect for their groceries. The virus has brought a new audience to online grocery, and this could boost the market long term with strong growth forecast through to 2024. Online grocery shopping is now offered by all of the major UK supermarket chains. Outside of these suppliers, the market is mainly populated by a wide range of niche, specialized retailers, many of which offer products that are not always available in major supermarkets.

**Click and Collect** - With the increasing popularity of online retailing, supermarkets and other retailers introduced Click and Collect, which has become hugely popular and is rapidly growing. Click-and-Collect is a concept, which brings together the benefits of online retailing with the advantages of maintaining a store-based retailing presence. Through these services, customers are able to access a vast catalogue of products, which often cannot be stocked by even the largest outlets from the comfort of their home, purchase the items online, and then collect the items from a store within easy reach. Some of the downsides are waiting times at collection points being too long. About 28 percent of consumers regularly use Click and Collect for grocery shopping.

**Convenience Stores or the “C-Sector”** - The UK’s convenience store market is highly fragmented, with a large number of retail operators. Store operators may be divided into several types: supermarket convenience stores, gas stations, other group food convenience stores, independent grocery stores, and specialist stores, such as newsagents, greengrocers, etc. Nine in 10 people visit a convenience store on a regular basis to buy everyday grocery items.

In addition to the above retail avenues, department store “food halls” and delicatessens present opportunities for listings of U.S. products. London-based department stores such as Harvey Nichols and Selfridges have expanded to other major UK cities - including 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 – [www.partridges.co.uk](http://www.partridges.co.uk), and Panzers in St. John’s Wood – [www.panzers.co.uk](http://www.panzers.co.uk)

### III. Competition

In the last decade, the UK consumer’s appetite for “healthy”, convenient, and ethnic foods has grown. There is an increasing demand for quick meal solutions, such as chilled ready meals or ingredients, and single snack portions. As a result, the UK domestic food manufacturing industry is sophisticated and advanced. UK new product development teams create innovative copies of international dishes and ready meals. If a U.S. product has been particularly successful in the UK, it is likely that a manufacturing site will be placed in the UK or EU.

The EU is the main competitor for U.S. consumer-orientated food. 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. This is subject to change depending on what trade deal is finalized with the EU following the UK’s departure from Europe. Products are sourced mainly from the Netherlands, France, Ireland, Denmark, Germany, Italy, and Spain. Fruits and vegetables primarily come from the EU.



The United States is the largest non-EU supplier to the UK, with around four percent of all UK food and drink imports. China, Brazil, South Africa, and Canada are some of the other top non-EU suppliers.

U.S. poultry currently faces significant barriers to entry into the European Union. In order to obtain the necessary export certification, U.S. poultry must not be treated with antimicrobials. As this practice is approved by the Food and Drug Administration (FDA) and is widespread in the U.S., an effective import ban is in place. All U.S. beef products must come from non-hormone treated cattle. Both U.S. beef and poultry must be slaughtered and processed in an EU-approved establishment. In regards to dairy products, they must come from an approved U.S. plant. For dairy, the approval of plants is managed by FDA (but the export license is issued by APHIS and AMS). All animal and animal products require an import license of some form, be it Product of Animal Origin (POAO), milk and milk products etc.

Anti U.S. lobby on agricultural products has been increasing for a number of years, but this has intensified with talks of a U.S. – UK trade agreement. At the time of writing, there are numerous media articles written on a daily basis against U.S. food products. In the past it has been the non-government organizations who have fed the media these stories, however in recent weeks there have been many from UK trade associations, as well as UK supermarkets and farmers wanting to protect UK products.

#### IV. Best Product Prospects

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

**Products Not Present Because They Face Significant Barriers:** Food additives not approved by the European Commission, Red meat and meat products produced with growth promotants, Most poultry and eggs and Genetically modified products that are not approved in the EU.

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

Product Category	Growth 2014 –2019 (%)	U.S. Exports to UK 2019 (\$ million)
Wine & Beer	+5.0	249.4
Tree Nuts	+23.1	210.8
Prepared Food	-11.4	151.0
Fresh Vegetables	+58.3	77.1
Processed Fruit & Vegetables	-49.6	48.7
Snack Foods (excl nuts)	-15.8	48.7
Chocolate & Cocoa Products	+56.6	41.0
Condiments	+27.0	33.3
Non Alcoholic Beverages Exc. Juices	0	22.6
Breakfast Cereals & Pancake Mix	+106.5	15.7
Fresh Fruit	-67.7	15.5

Eggs and Products	+19.0	13.1
Dairy Products	-16.2	12.4
Pet Foods (Dog & Cat Food)	+37.7	6.2
Fruit & Vegetable Juices	-38.3	6.1
Other Consumer-Oriented Products	+37.8	5.1
Pork & Pork Products	-32.0	3.4
Beef & Beef Products	-70.0	0.6
Poultry Meat	+100	0.4

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

## V. Key Contacts and Further Information

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

**United States Department of Agriculture**, Embassy of the United States of America, 33 Nine Elms Lane, London, SW11 7US, Tel: +44 20 7891 3313 E-Mail: [aglondon@fas.usda.gov](mailto:aglondon@fas.usda.gov)  
Website: [www.fas.usda.gov](http://www.fas.usda.gov) or <https://uk.usembassy.gov/>

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

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)**, 21 Dartmouth Street, London, SW1H 9BP  
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 whole range of retailers from large multiples and department stores through to independents.

**Institute of Grocery Distribution (IGD)**, Grange Lane, Letchmore Heath, Watford, Hertfordshire WD2 8DQ, 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). This covers more than 130 retailers in 50+ countries. Retail Analysis provides an understanding of retailer strategies, as well as the latest news in this sector.

## Attachments:

No Attachments