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The Market for Health Foods, Vitamins and Nutraceuticals in the United Kingdom

June 1999

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Le marché de: Le marché des aliments de santé, des vitamines et des nutraceutiques au Royaume-Uni)

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THE MARKET FOR HEALTH FOODS, VITAMINS, AND NUTRACEUTICALS IN THE UNITED KINGDOM

Team Canada • Équipe Canada

EXECUTIVE SUMMARY

Due to the increase in the number of over-the-counter medicines, Britain's National Health Service (NHS) has begun imposing tighter controls on prescription medicines while encouraging consumers to use more vitamins, minerals, and herbal medicines. As a result, throughout the 1990s, the health food, vitamin, and nutraceutical markets have experienced strong growth, which is forecast to continue for the foreseeable future.

The health food market was estimated to be worth over £886 million in 1998, a 7% increase from 1997. Although this amount represents less than 2.5% of the total food market in the United Kingdom, health foods have experienced steady growth throughout the 1990s, and experts forecast this market will be worth £1.1 billion by 2003. More specifically, the market for vitamins, minerals, and supplements was estimated to be approximately US$530 million in 1997. This market is the fastest-growing over-the-counter health care sector in the U.K. and is forecast to grow by an average of 5% annually until 2004.

Although the U.K. represents less than 5% of the world's total consumption of nutraceuticals, the country is the third-largest market for nutraceuticals in Europe. Moreover, demand is forecast to increase 83% from US$246 million in 1997 to approximately US$450 million in 2007.

Domestic manufacturers currently dominate production of health foods, vitamins, and nutraceuticals in the United Kingdom. Recently, however, foreign manufacturers, especially from the United States, have gained an increased share of this growing market. Canadian producers presently represent only a small portion of the total market.

TABLE OF CONTENTS

THE MARKET FOR HEALTH FOODS, VITAMINS, AND NUTRACEUTICALS IN THE UNITED KINGDOM

Team Canada • Équipe Canada

MARKET OVERVIEW

As a result of the number of new health food products released, the boundaries between mainstream and health foods have become blurred. There is also substantial overlap in the markets for vitamins, supplements, and nutraceuticals since many products are made up of similar materials. In addition, as more products enter this market, many products which were initially considered health foods are now considered mainstream foods. As a result, import/export figures vary considerably, depending on the products that are included in each category.

With a population of nearly 60 million, the United Kingdom is the third-largest economy in Western Europe and represents a growing market for health products. A general trend toward health-consciousness, combined with demographic factors such as stabilizing levels of income, a greater number of women in the workforce, and an aging population, have resulted in an increasingly career-oriented and health conscious consumer base. These trends highlight the demand for nutritional foods that require little or no preparation.

British consumers are among the most demanding in the world, a fact that has resulted in an extremely competitive marketplace as manufacturers cater to consumers demands in an attempt to gain market share. Larger package sizes, a stream of new products, and private label brands have been introduced to the health foods, vitamins and nutraceuticals market and are the result of an increasingly competitive market.

Between 1991 and 1997, the market for health foods, vitamins, and supplements grew by 54% -- the largest growth of any over-the-counter drug sector. Moreover, growth in these sectors is forecast to continue to grow by 5% to 6% annually through 2004.

Given the infancy of Britain's health food, vitamin, and nutraceutical markets, many consumers have yet to develop strong brand loyalty. As a result, new and more specialized products have an opportunity to gain a favourable share of the market. However, Canadian companies need to ensure that they provide competitive pricing, adequate advertising and aggressive sales strategies when introducing new products to the U.K. market.

One increasingly popular subsector of the health foods sector is the organic foods sector. Organic foods are those that are produced with very few or no chemicals added. However, the United Kingdom Register of Organic Food Standards [UKROFS] does allow more than 30 additives to be used in organic food production including flavourings, colourings and preservatives. Although most organic products tend to be 10% to 35% more expensive than conventional foods, sales of organic foods in the United Kingdom have been increasing by 20% annually over the last decade. In 1996, the market for organic foods was estimated to be worth £200 million and is projected to grow to nearly £500 million by 2001. While approximately 70% of all organic foods are currently imported, a growing number of British farmers are producing organic foods. In fact, the British Soil Association estimates that by 2005, 10% to 15% of all farming in the U.K. will be organic.

Key Factors Shaping Market Growth

One of the key factors shaping market growth in the health foods sector is the growing number of vegetarians. There are estimated to be 3 million vegetarians in the United Kingdom. In response to this heightened demand for vegetarian foods, various retail outlets have increased the amount of space allotted to these products. However, despite increasing the amount of shelf space, many retailers have trouble maintaining adequate stocks of health foods as production is low and supply continues to be inconsistent to meet market demands. In addition, due to the high level of competition in this market, many producers are unable to acquire any shelf space whatsoever.

One of the major factors inhibiting growth of in the health foods sector is the significantly longer preparation times needed for health foods than for non-health foods. Although many manufacturers have begun producing products and meal packages that require less preparation time, many vegetarian products still have comparatively long preparation times.

Sales of health food products have benefitted from recent concerns about food quality and safety in the United Kingdom. Incidences of salmonella and listeria and the bovine spongiform encephalopathy (BSE) meat scare have encouraged British consumers to consider other types of foods, particularly organic products.

However, the greatest hindrance to growth of the organic food market has been the lack of dependable supply. While most supermarkets have expanded their organic product lines and continue to call for increased investment in the organic sectors, consumers have been frustrated by the lack of available products. A recent survey by Nielsen disclosed that 25% of consumers buy food on a regular basis, but also revealed that a larger percentage of consumers would buy organic food if the range of products was greater and supply was dependable.

Cutbacks in health care have also led to increased demand for health products as more consumers are using health foods, vitamins, and nutraceuticals on a daily basis as a preventative measure. In addition, more consumers are using vitamins and minerals to treat minor illnesses rather than consulting their medical physician.

Opportunities

Canadian producers must realize that nearly all products and services within the health care market can be provided by domestic businesses. However, improved versions of existing products and niche items which offer good value for money have a good chance of establishing themselves within this market. Canadian producers may find it difficult to sell competitively priced products from Canada.

Organic foods represent an excellent opportunity for Canadian exporters to enter the U.K. market. Organic products include meats, produce, yogurt, flour, oils, chocolates and cheeses. One of the best opportunities for organic foods is in the baby food sector. Organic baby food sales, which represented 6% of total sales in 1997, are steadily increasing due to the fact that parents tend to be willing to pay more for safer or healthier products for their children.

The relatively new herbal and fruit teas sector has also experienced strong growth in recent years as consumers turn to these products as an alternative to caffeine-based products. As manufacturers develop higher-quality products and a broader variety of teas, the popularity of these products is expected to grow, thus presenting an opportunity for Canadian exporters.

Opportunities for sales of bulk vitamins and minerals are also anticipated to increase in coming years. Both bulk vitamins and minerals are forecast to grow by over 5% annually through 2002 to reach a value of US$83 million and US$141 million, respectively.

Within the vitamin and supplement sectors, there are expected to be growing opportunities for sales of vitamin E and children's dietary supplements. The U.K. vitamin E market, currently worth US$9.3 million, is projected to show strong growth in the coming years, while the children's supplements sector, currently valued at US$15 million, is forecast to continue to grow by 20% annually through 2002.

Actual and Planned Projects

In August 1997, NBTY Inc., a U.S.-based health food company, acquired the Holland & Barrett health food chain, the largest vitamin retailer in the U.K. (sales of US$168.8 million in 1997). The NBTY takeover will increase sales by approximately 100% annually. NBTY will continue to operate the 410 Holland & Barrett stores under their original name.

In 1998, the British government continued to debate the legal levels of dietary supplements of vitamin B-6, which are consumed by 3 million people in the United Kingdom. Implementation of legislation to control the sale of supplements containing more than 10 mg of vitamin B-6 has been deferred for two years.

In December 1998, U.K.-based Irwin Naturals/4 Health Inc. came to an agreement with Holland & Barrett to sell its diet supplement product, Diet System 6. This agreement is a follow-up to an October 1998 agreement with Boots' drugstores to market the same product through its 1300 stores. Irwin hopes to continue expanding its distribution of Diet System 6 through similar agreements with other retail outlets in 1999.

As of January 1, 1999, the British Herbal Medicine Association (BHMA) introduced a set of standards to which all manufacturers must adhere. The new legislation, which addresses quality concerns over non-licensed products, sets out raw material and manufacturing standards for all herbal medicine producers.

COMPETITIVE ENVIRONMENT

Local Capabilities

Domestic companies have dominated production of most health foods and vitamins as many products are less expensive to produce domestically. In 1997, Seven Seas held 28% of the vitamin, mineral, and supplement market, followed by Roche (13%), and Boots (11%). A large portion of this market is supplied through private label brands.

In 1965, the Health Food Manufacturers Association (HFMA) was formed to promote and protect the interests of domestic manufacturers, distributors, and suppliers. Currently, the HMFA helps new British producers access the market in addition to helping maintain a strong health food sector.

The National Association of Health Stores (NAHS), an organization primarily composed of independent retailers, represents the interests of health food retailers. The NAHS currently represents approximately 35% of all independent retailers in the British health food market.

International Competition

Canadian health food and vitamin exporters will primarily face competition from the United States and European Union (EU) countries such as Germany, France, and the Netherlands. Location and preferential tariffs give EU countries a considerable advantage over non-EU countries such as Canada.

A number of U.S. companies have accessed this market by purchasing controlling interest of vitamin and health food manufacturers in the United Kingdom. While not an option for most Canadian companies, this method has allowed U.S. companies such as NBTY Inc. to gain access to this market.

Canadian Position

Currently, Canadian exports of health foods, vitamins, and nutraceuticals to the United Kingdom are minimal. However, opportunities exist for Canadian companies to benefit from the projected growth of these markets in coming years. Consumers in the U.K. generally perceive Canada to be a relatively clean and natural country, a perception that may aid Canadian exporters in gaining access to these markets.

Opportunities exist for joint ventures with manufacturers of health foods, vitamins and nutraceuticals. Both small and large manufacturers are interested in joint ventures, although such partnerships with smaller producers may be more plausible. Exporters should note that dealing with smaller companies may limit distribution capabilities.

Competitive Advantage through Canadian Government Policies and Initiatives

The Export Development Corporation (EDC) offers export financing and insurance to Canadian exporters. Additionally, insurance can be provided for larger transactions that are subject to the terms and conditions established by the buyer. EDC prefers to work through letters of credit, banks credits or bank guarantees. Details and approval for financing will be considered case by case. For more information, please contact EDC.

The Canadian Commercial Corporation (CCC) also offers small and medium-sized Canadian companies access to financing and better payment terms under the Progress Payment Program (PPP). The PPP concept was developed as a partnership between major Canadian financial institutions and the CCC. It enables the exporter's bank to open a project line of credit for the exporter's benefit, based on CCC approval of the project and the exporter's ability to perform. For more information, please contact the CCC.

The Program for Export Market Development (PEMD) is the government's primary international business development program. The objective of PEMD is to increase export sales of Canadian goods and services by sharing the costs of activities that companies normally could not or would not undertake alone, thereby reducing risks involved in entering a foreign market. The PEMD refundable contribution is a minimum of $5,000 and a maximum of $50,000. Preference is given to companies with annual sales greater than $250,000 and less than $10 million, or with less than 100 employees for a firm in the manufacturing sector and 50 in the service industry. Eligible activities, the costs of which are shared on a

50/50 basis, include market visits, trade fairs, incoming buyers, product testing for market certification, legal fees for marketing agreements abroad, transportation costs of off-shore company trainees, product demonstration costs, promotional materials, and other costs necessary to execute the market development plan (Other components of the program deal with international bid preparation under Capital Project Bidding, and with Trade Associations when developing international marketing activities for their membership). For additional information, or to receive an application, please contact the International Trade Centre in your province.

PRIVATE-SECTOR CUSTOMERS

The popularity of health foods, vitamins, and nutraceuticals varies among consumers. Generally, consumption tends to be highest among the elderly and lowest among teenagers, while women tend to be the largest consumers of health products within each age group. Sales of health foods, vitamins, and nutraceuticals also tend to be seasonal -- highest during the winter months when consumers are attempting to avoid or fight viruses and colds.

PUBLIC-SECTOR CUSTOMERS

Successful businesses must demonstrate their ability to complete contracts on a timely basis; meet required standards; establish a respectable financial and commercial reputation; and gain insight into government purchasing procedures. While it is not necessary to be a British-based company, many British government departments do like to see an overseas firm partnered with a U.K. or European firm.

National Health Service (NHS) purchasing tends to be highly centralized and currently the NHS is attempting to substantially reduce the number of suppliers which is uses. As a result, it is unlikely that Canadian producers would be able to sell directly to the government. However, Canadian manufacturers who are interested in selling to the NHS should use a U.K. distributor which will eliminate worries about public procurement procedures.

MARKET LOGISTICS

Channels of Distribution

Boots and Superdrug dominated the market for over-the-counter vitamins, minerals, and supplements in 1998. In fact, these two retailers together accounted for approximately 50% of total sales. Other pharmacies claimed a 21% share of the market, while grocery stores and health food outlets held roughly 20% and 8%, respectively.

Independent health food retailers have steadily lost a share of the health food market to supermarkets and other large retail outlets in recent years. Although large retailers have gained a greater share of the health food market at the expense of independent retailers, large supermarkets are also responsible for the surging popularity of health foods by facilitating the expansion of health food lines. The leading independent health food outlets include Natures Store, Brewhurst Health Food Supplies, Goodness Foods, Suma Wholefoods, and Queenswood.

As Table 1 illustrates, Holland & Barrett is the single largest chain of specialist health food stores, followed by Health and Diet Centres and General Nutrition Company (GNC).

Table 1. Number of Specialist Health Food Stores In The U.K., 1995-1998

	1995	1996	1997	(*e*)1998
Holland & Barrett	350	380	410	450
Health and Diet Centres (acquired by GNC in 1995)	22	22	22	19
GNC	-	3	15	25
Others	1,405	1,354	1,265	1,150
Total	1,877	1,759	1,712	1,644

Source: *Key Note, Health Foods in the U.K., November 1998.*

Tesco is the largest supermarket retailer of health foods (with 23% of the market), followed by Sainsbury (with 20%) and Asda and Safeway (12% and 11%, respectively).

Direct Sales

As a result of increasing price competitiveness, which has led retailers to attempt to cut costs to consumers by importing products directly from the manufacturer, direct sales of vitamins, minerals, and supplements have become more popular in recent years. However, exporters are encouraged to use the services of an agent even when selling directly to a retailer in order to ensure that all U.K. food regulations are met.

While direct sales of health food products have been less common than the use of distributors or wholesalers, recent efforts to adopt direct sales are aimed at attaining a level of price competitiveness with normal food products.

Distributors and Wholesalers

In order to ensure efficient product distribution, exporters are encouraged to retain the services of a distributor/wholesaler. There are many knowledgeable distributors and wholesalers in the U.K., many of which deal specifically with health foods, vitamins, and supplements. However, distributors and wholesalers have varying degrees of market coverage; many cover large portions of the country, while others service only urban centres. More than one distributor or wholesaler may therefore be necessary to guarantee national distribution although Canadian exporters may wish to establish themselves regionally before attempting national distribution. Brewhurst is currently the largest wholesaler in the U.K. health food market.

When choosing a distributor or wholesaler, Canadian exporters are encouraged to consider the distributors' relationships with local governments, buyers and banks; the condition of their facilities; and their willingness and ability to keep inventory.

Agents and Sales Representatives

Agents are excellent channels through which exporters can introduce new products into the U.K. market. While agents solicit business and enter into agreements on behalf of the exporter they are representing, they do not take ownership over products which they sell.

An exporter needs to weigh a number of factors when selecting an agent, such as which region(s) the agent covers, their reputation, product knowledge, experience in handling the exported product, the commission to be paid, what (if any) after sales service is provided, the track record, and the size and quality of the agent's staff.

Market-entry Considerations

As the market for health products becomes increasingly competitive, effective advertising has become crucial to market success. With the large number of new products entering the market and the correspondingly limited shelf space, a strong advertising campaign can make the difference between success and failure. Between 1995 and 1997, advertising expenditure on vitamins and supplements more than doubled, reflecting the growing importance that manufacturers have put on successful marketing.

Although there are many opportunities for health food and vitamin exporters, a number of retailers in the U.K. have developed private-label brands. Drug stores, supermarkets, and other retail outlets have found that private-label brands are both increasingly popular and less expensive to produce. These private-label brands will create increased competition for Canadian exporters.

Increased pressure from large speciality stores, pharmacies, and supermarkets, combined with high business rates and an increased number of foreign-made products are forecast to result in either the amalgamation or closure of many independent retailers. As a result, the number of independent health food retailers is anticipated to decrease. Therefore, Canadian exporters should carefully consider the financial stability and long-term prospects of potential distributors before signing contracts.

Suggested Business Practices

British business practices are not substantially different than those found in Canada. However, Canadian exporters should note that there are a number of minor differences, which can have a significant impact on business relations.

The British business climate is one of conservative formality. The British have developed a reputation for being reserved both on a personal level and in their business relationships. Developing more casual or personal relationships with British counterparts can be a slow process.

Contacts play a key role in the British business community, since many businesspeople feel more comfortable being introduced by a mutual business associate. Canadian exporters are encouraged to use the services of a third party, such as an agent, to introduce themselves to a potential business partner.

Import Regulations

As a member of the European Union, the U.K. follows the Community Integrated Tariff (TARIC) system, which applies duties to all imports from non-EU countries. EU/British import regulations, duties, and tariff-rate-quotas protect domestic industries by limiting the range of foreign products entering the market. Combined with transportation costs, these factors usually result in higher-priced Canadian products.

Currently, both vitamins and pharmaceuticals (which include nutraceuticals) are tariff-free. Tariffs on health foods are food supplements vary considerably depending on the specific products. Canadian producers should consult with British agents/distributors to determine applicable tariff rates. However, most health foods, depending on the composition, are subject to a tariff rate of at least 10%.

Local Standards, Certificates or Registrations

Commercial invoice: The commercial invoice serves as a bill to the buyer from the exporter. The invoice should be thoroughly checked, since any errors or omissions can result in serious delays, fines or even confiscation. No special form is required, and must include:

- place and date of issue;
- names and addresses of the importer and exporter;
- a detailed description of the merchandise, including identifying marks, quantities (in units customary to international trade), quality and varieties;method of shipment;
- all freight and insurance charges;
- signature of the responsible officer, along with the name and title; and
- shipper's invoice number and the customer's order number.

Certificate of origin: A certificate of origin verifies that the goods originate in Canada and are therefore subject to all duties or taxes that apply to Canadian products. Certificates of origin are not required for all products, but it is recommended that exporters complete these forms to avoid any possible problems or delays.

Packaging and labelling: It is recommended that Canadian exporters examine both British and EU regulations regarding packaging and labelling standards in order to ensure that products adhere to all regulations. All imported health food, vitamin, and nutraceutical labels are required to be in English and to include the following general information:

- name of the product;
- statement of what the product is;
- list of ingredients and weights in metric units;
- list of additives, preservatives, or colouring used;
- expiry date and any other storage requirements;
- product's country of origin;
- all nutritional information; and
- manufacturer's lot or batch number.

Information on vitamins and minerals must be expressed as a percentage of the recommended daily allowance. This percentage may be displayed in graphical form.

If products cannot be labelled, the appropriate information must be included on any packaging, accompanying printed material, or product literature.

Authentication of documents: Documents that need to be authenticated, such as certificates of sale and letters authorizing an exporter's local agent or importer to act on

Department of Foreign Affairs and International Trade
Authentication and Service of Documents (JLAC)
125 Sussex Dr., Ottawa K1A 0G2
Tel: (613) 992-6602
Fax: (613) 992-2467

Export Credit Risks, Restrictions on Letters of Credit or Currency Controls

Credit/payment terms are generally between 30 and 60 days, with open account terms representing the most common method.

PROMOTIONAL EVENTS

Event / Description	Organizer
Food & Drink Expo March 19-22, 2000 Birmingham, England Food & beverage, catering, fresh produce, food ingredients.	**Miller Freeman** 630 Chiswick High Rd London, W4 5BG, England Tel: (44-181) 742-2828 Fax: (44-181) 742-4936 Internet: http://www.unmf.com

Food & Drink Processing
April 1999
Birmingham, England
Process plant equipment & services, handling & packaging, storage, ingredients.

Reed Exhibitions Ltd.
Oriel House, 26 The Quadrant
Richmond-Upon-Thames
Surrey, TW9 1DL, England
Tel: (44-181) 910-7910
Fax: (44-181) 910-7930
Internet: http://www.reedexpo.com

Interphex
November 7-9, 2000 and November 2002
Birmingham, England
Processing, production and packaging equipment and services for the manufacture of pharmaceuticals.

Reed Exhibitions Ltd.
Oriel House, 26 The Quadrant
Richmond-Upon-Thames
Surrey, TW9 1DL, England
Tel: (44-181) 910-7910
Fax: (44-181) 910-7930
Internet: http://www.reedexpo.com

Chemex
September 5-6, 1999
London, England
Retail pharmacy show.

Miller Freeman
630 Chiswick High Rd
London, W4 5BG, England
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Fax: (44-181) 742-4936
Internet: http://www.unmf.com

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Western Europe Division

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Internet: http://www.bdc.ca/

Canadian Commercial Corporation
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Ottawa, ON K1A 0S6
Tel: 1-800-748-8191 or (613) 996-0034

125 Sussex Dr.
Ottawa, ON K1A 0G2
Tel: (613) 995-8269
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Department of Foreign Affairs & International Trade
Market Support Division
125 Sussex Dr.
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Alliance of Manufacturers and Exporters Canada
75 International Blvd, 4th Floor
Toronto, ON M9W 6L9
Tel: (416) 798-0000
Fax: (416) 798-8050
Internet: http://www.plantir.ca/the-alliance
E-mail: national@the-alliance.com

Fax: (613) 995-2121
Internet: http://www.ccc.ca
E-mail: info@ccc.ca

Agriculture and Agri-Food Canada
930 Carling Avenue, 10th Floor
Ottawa, ON K1A 0C5
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Fax: (613) 759-7506

Export Development Corporation
151 O'Connor St.
Ottawa, ON K1A 1K3
Tel: (613) 598-2500
Fax: (613) 237-2690
E-mail: export@edc4.edc.ca
Internet: http://www.edc.ca

U.K. Government Contacts

Ministry of Agriculture, Fisheries and Food (MAFF)
Nobel House, 17 Smith Square
London, SW1P 3HX U.K.
Tel: (44-171) 238-5332 or 238-5324
Fax: (44-171) 238-6609
Internet: http://www.maff.gov.uk/

British Overseas Trade Board
Department of Trade and Industry
Kingsgate House
66-74 Victoria St.
London, SW1E 6SN U.K.
Tel: (44-171) 215-5000
Fax: (44-171) 215-8000

Invest in Britain Bureau
Department of Trade and Industry
London House, 19 Old Court Place
London, W8 4PF U.K.
Tel: (44-171) 215-2501
Fax: (44-171) 215-8451

Department of Trade and Industry
Publications Unit
151 Buckingham Palace Rd
London, SW1W 9SS U.K.
Tel: (44-171) 215-1770
Fax: (44-171) 215-4146

British Standards Institution
Linford Wood
Milton Keynes, MK14 6LE U.K.
Tel: (44-1908) 221-166
Fax: (44-1908) 320-856

H.M. Customs and Excise
King's Beam House, 22 Upper Ground
London, SE1 9PJ U.K.
Tel: (44-171) 620-1313
Fax: (44-171) 865-4944

British Trade & Investment Office
British Consulate General
777 Bay St., Suite 2800
Toronto, ON M5G 2G2
Tel: (416) 593-1290
Fax: (416) 593-1229
Internet: http://www.uk-canada-trade.org/

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Bank of Montreal
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London, EC4N 8ED U.K.
Tel: (44-171) 236-3225
Fax: (44-171) 236-2655

Bank of Nova Scotia
Scotia House, 33 Finsbury Square
London, EC2A 1BB U.K.
Tel: (44-171) 638-5644
Fax: (44-171) 638-8488

Canadian Imperial Bank of Commerce
Cottons Centre
London, SEI 2QL U.K.
Tel: (44-171) 234-6220
Fax: (44-171) 407-6456

National Bank of Canada
Princes House, 95 Gresham St.
London, EC2V 7LU U.K.
Tel: (44-171) 726-6581
Fax: (44-171) 726-4265

Royal Bank of Canada
71 Queen Victoria St.
London, EC4V 4DE U.K.
Tel: (44-171) 489-1188
Fax: (44-171) 329-6144

Toronto Dominion Bank
Triton Court, 14/18 Finsbury Square
London, EC2A 1DB U.K.
Tel: (44-171) 920-0272
Fax: (44-171) 638-1042

Food & Beverage Trade Associations

Food and Drink Federation
6 Catherine St.,
London, WC2B 5JJ U.K.
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Institute of Grocery Distribution
Letchmore Heath
Watford, WD2 8DQ U.K.
Tel: (44-1923) 857-141
Fax: (44-1923) 852-531

Health Food Manufacturers' Association (HFMA)
63 Hampton Court Way
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Surrey, KT17 0LT, England
Tel: (44-181) 398-4066
Fax: (44-181) 398-5402

Institute of Health Food Retailing
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Internet: http://www.nutrition.org.uk

National Association of Health Stores (NAHS)
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Millhouses
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Fax: (44-114) 236-0433

Soil Association Ltd.
Bristol House
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Leatherhead Food RA. *U.K. Developments in Healthier Food and Drink*, January 1998.

Market Assessment. *Vitamins and Food Supplements in the U.K.*, March 1998.

Newsday. *NBTY Completes Purchase of U.K. Health Food Chain*, August 9, 1997.

PJB Publications. *Vitamins, Minerals and Supplements in Europe to 2003*, November 1998.

The Scotsman. "Cancer Links Revealed in 'Healthy' Organic Produce", October 14, 1998.

United States Department of Agriculture. *Annual Marketing Plan*, 1997.

Wall Street Journal. "NBTY to Purchase Health-Food Firm for $168.8 Million", August 8, 1997.

OTHER REFERENCE MATERIAL

Useful Internet Sites

Agri-Food Trade Service:
http://ats.agr.ca

British Chambers of Commerce:
http://www.britishchambers.org.uk/

Department of Foreign Affairs and International Trade:
http://www.dfait.maeci.gc.ca

European Central Bank:
http://www.ecb.int/

European Federation of Associations of Health Product Manufacturers:
http://www.ehpm.org/members/hfma.htm

ExpoGuide:
http://www.expoguide.com

Exportsource:
http://exportsource.gc.ca/

Food & Drink:
http://www.foodanddrink.co.uk/

Government Statistical Service:
http://www.statistics.gov.uk/

Leatherhead Food Research Association:
http://www.lfra.co.uk/

Media U.K. Internet Directory:
http://www.mediauk.com/directory/

Ministry of Agriculture, Fisheries and Food:
http://www.maff.gov.uk/

Office for National Statistics:
http://www.ons.gov.uk/ons_f.htm

Reports U.K.:
http://www.carol.co.uk/reports/index.html

Strategis:
http://strategis.ic.gc.ca

Tradeport:
http://www.tradeport.org

Trade Show Central:
http://www.tscentral.com

U.K. Department of the Environment, Transport and the Regions:
http://www.detr.gov.uk/

U.K. Department of Trade & Industry:
http://www.dti.gov.uk/

U.K. Department of Trade & Industry Reports:
http://www.foresight.gov.uk/publications/

U.K. Government Information Service:
http://www.open.gov.uk/

U.K. Local Governments:
http://www.oultwood.com/localgov/england.htm

U.K. Politics Pages:
http://sun1.bham.ac.uk/turnersj/pollinks.html

U.K. Treasury Department:
http://www.hm-treasury.gov.uk/

U.S. Department of Agriculture:
http://www.fas.usda.gov/

World Bank:
http://www.worldbank.org/

READER EVALUATION

Please help the Team Canada Market Research Centre to produce market reports which meet your information needs by completing this evaluation form and returning it by fax (613) 943-1103. Thank you for your valuable input.

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1. How did you obtain a copy of this market report?

☐ InfoCentre FaxLink system
☐ InfoCentre help line
☐ Local government office
☐ Government worldwide web site
☐ InfoCentre bulletin board system
☐ Other: ___________________________

2. How would you describe this market report?

	Strongly agree	Agree	No opinion	Disagree	Strongly disagree
Useful	☐	☐	☐	☐	☐
Complete	☐	☐	☐	☐	☐
Well organized	☐	☐	☐	☐	☐
Well written	☐	☐	☐	☐	☐
Ideal length	☐	☐	☐	☐	☐

3. In what form do you prefer to obtain these reports?

☐ Print ☐ Electronic

4. Based on the information in this report, what specific action(s) does your organization plan to take in this market? Check all that apply.

☐ Seek an agent/distributor
☐ Visit the market
☐ Do more research
☐ Other: ____________________________
☐ Contact Canadian trade office abroad
☐ Participate in a trade show abroad
☐ Nothing

5. What other market reports would be of benefit to your organization? Please identify specific products and countries.

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6. Which of the following categories best describes your organization? Check one only.

☐ Processor/manufacturer
☐ Trading house
☐ Export service provider
☐ Industry/trade association
☐ Government
☐ Student/academia
☐ Consultant
☐ Other: _______________________________

7. What were your organization's total sales last year, in Canadian dollars?

☐ Less than 10 million
☐ 10 million to 50 million
☐ More than 50 million
☐ Not applicable

Additional comments/suggestions for improvement:

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OPTIONAL — The name of your organization is: ________________

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