

## CBI MARKET SURVEY

THE NATURAL COLOURS, FLAVOURS AND THICKENERS  
MARKET IN THE UNITED KINGDOM

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**Report summary**

This CBI market survey discusses, amongst others, the following highlights for the natural colours, flavours and thickeners market in the United Kingdom:

- In the UK, demand for natural colours, flavours and thickeners is relatively high compared to other EU countries. The reason for this is the presence of a large food ingredients industry.
- The UK can not be considered to be a large producer of raw material for natural colours, flavours and thickeners. For a great part, this is due to climatic conditions.
- The UK is the third largest importer of natural colours, flavours and thickeners.
- In 2005, developing country suppliers were important, accounting for 45% of total import value. Especially with respect to essential oils and natural gums, resins and balsams, developing country suppliers played an important role.

This survey provides exporters of natural colours, flavours and thickeners with sector-specific market information related to gaining access to the United Kingdom. By focusing on a specific country, this survey provides additional information, complementary to the more general information and data provided in the CBI market survey 'The natural colours, flavours and thickeners market in the EU', which covers the EU market in general. That survey also contains an overview and explanation of the selected products dealt with, some general remarks on the statistics used, as well as information on other available documents for this sector. It can be downloaded from <http://www.cbi.eu/marketinfo>

**1. Market description: industrial demand and production****Industrial demand*****Total market size***

Industry sources indicate that the UK can be considered to have a relatively large industrial demand for natural colours, flavours and thickeners. The reason for this is the presence of several large production facilities of multinational food ingredient companies like IFF, Givaudan and Danisco. The UK also has a large market for end-products with natural colours, flavours and thickeners. Between 2004 and summer 2005, the UK had the highest number of new product releases labelled as "all natural" or without preservatives or additives (Mintel (international market research company), 2005). Expected growth of the food industry, together with increased health awareness of consumers in the UK and surrounding countries, will positively affect the demand for natural colours, flavours and thickeners in the UK.

***Product groups***

According to industry sources, the UK has a particularly large industrial demand for natural flavours and essential oils. Since several leading companies in the flavour industry have production facilities in the UK, industrial demand for these flavours and essential oils is relatively high compared to other EU countries.

Industry sources indicate that, compared to other EU countries, the UK is one of the leading consumers of raw materials for natural colours, as there are several manufacturing facilities of leading food colour companies like Overseal and Sensient Food Technologies.

A number of companies processing agar-agar, carrageenan, xanthan gum, gum Arabic, locust bean gum and guar gum are located in the UK. Demand from these companies for raw materials is relatively high when compared to other EU countries.

### **Production**

The production described here is limited to the production of raw materials as the processing into end-products has already been described above.

#### ***Total production***

The UK can be regarded as a small producer of raw materials for natural colours, flavours and thickeners. Industry sources indicate that it is not expected that this will change in the immediate future. For a great part, this is the result of climatic conditions which are not suitable for the production of raw material for natural colours, flavours and thickeners.

#### ***Product groups***

The UK is a minor producer of raw material for essential oils compared to other EU countries. It only produces small amounts of lavender oil, mint oil and garden sage. By far the largest part of the production of raw material for essential oil takes place in Italy, Spain and France.

Information on production in the UK of raw materials for other natural colours, flavours and thickeners was not encountered. However, the lack of information indicates that production is negligible as, apparently, it is of too little importance to document. Moreover, other sources describing EU production do not refer to the UK, indicating the minor importance of the UK compared to other EU countries.

#### ***Major players***

Refer to Section 3 for companies with processing facilities in the UK.

### **Trends in industrial demand and production**

- Continued growth in the consumption of ethical products, especially fair trade products.
- Continued growth in the consumption of healthier products.
- Increased demand for convenience food with a long shelf-life, which often includes more food additives.

### **Opportunities and threats**

- New applications for many hydrocolloids can increase the demand for these products.
- Increased scepticism concerning 'green' products may temper the expected increase in demand for natural colours, flavours and thickeners.

### **Useful sources**

- FDF (<http://www.fdf.org.uk>): Food and Drink Federation
- FIAI (<http://www.faia.org.uk>): Food Additives and Ingredients Association
- BEMA (<http://www.bemaorg.org>): The British Essence Manufacturers' Association

## **2. Trade: imports and exports**

### **Imports**

#### ***Total imports***

In 2005, the United Kingdom was the third largest importer of natural colours, flavours and thickeners, with an import value amounting to € 259.7 million. Therefore, the United Kingdom can be considered as an importer of great significance. However, in the period 2001 – 2005, imports showed no growth. The share of developing countries in the United Kingdom's imports accounted for 45% in 2005. In the period between 2001 and 2005, the value of the imports sourced in developing countries increased only slightly, by 1% annually.

In 2005, the leading developing country supplier of natural colours, flavours and thickeners was Argentina, accounting for 10% of total imports, followed by Sudan (8%). Noteworthy is the high annual growth of the value of imports from Sudan (65%) in particular, which were partly caused by price increases for Arabic gum, and also from Argentina (14%).

The supply of natural colours, flavours and thickeners, is not dominated by a handful of countries but is more or less evenly divided over a variety of countries. Therefore the import market of the United Kingdom can be considered to be fragmented.

## Imports by product group

**Table 2.1 Leading suppliers of natural colours, flavours and thickeners to the United Kingdom (share in imported value, 2005)**

Product	2001 € million	2003 € million	2005 € million		Leading suppliers in 2005 (share in %)	Share in United Kingdom imports (%)
<b>Total</b>	257.6	220.1	259.7	Intra-EU:	France (11), Germany (6), Denmark (5), Spain (3), Italy (3)	33
				Extra-EU excl DC*:	USA (18), Japan (1), Australia (1), Singapore (1), Hong Kong (1)	23
				DC*:	Argentina (10), Sudan (8), India (7), China (7)	45
Natural Colours	20.0	21.7	19.2	Intra-EU:	Denmark (18), France (13), The Netherlands (10), Germany (8), Spain (7)	65
				Extra-EU excl DC*:	USA (6), Hong Kong (5), Israel (1)	12
				DC*:	India (15), Peru (6), Kenya (1), China (1)	24
Flavours	29.2	13.6	15.0	Intra-EU:	France (11), Germany (9), The Netherlands (1)	21
				Extra-EU excl DC*:	Japan (16), Norway (3), Singapore (3), Hong Kong (1), USA (1)	25
				DC*:	China (30), India (23), Brazil (1)	54
Manioc starch	0.6	0.8	0.6	Intra-EU:	Germany (12), The Netherlands (1), Denmark (1)	14
				Extra-EU excl DC*:	USA (4)	4
				DC*:	Thailand (57), Brazil (12), Vietnam (9), Ghana (2), Colombia (2)	82
Natural gums, resins and balsams	15.0	16.5	38.0	Intra-EU:	France (14), Germany (4), Belgium (1), The Netherlands (1), Sweden (1)	21
				Extra-EU excl DC*:	USA (7)	7
				DC*:	Sudan (57), Nigeria (4), India (4), Iran (2), Cameroon (1)	72
Pectates, agar-agar, mucilages and thickeners	50.1	44.9	48.3	Intra-EU:	Denmark (17), Germany (16), France (11), Spain (10), Italy (6)	65
				Extra-EU excl DC*:	USA (7)	8
				DC*:	Philippines (8), India (6),	27

Product	2001 € million	2003 € million	2005 € million		Leading suppliers in 2005 (share in %)	Share in United Kingdom imports (%)
					China (5), Indonesia (4), Morocco (2)	
Essential oils	142.6	122.6	138.7	Intra-EU:	France (11), Germany (3), Italy (3), The Netherlands (1), Austria (1)	22
				Extra-EU excl DC*:	USA (28), Australia (1), Singapore (1), United Arab Emirates (1)	33
				DC*:	Argentina (18), China (7), India (5), Brazil (4), Mexico (3)	45

Source: Eurostat (2006)

\*DCs: Developing countries

In 2005, the most important product group was essential oils, accounting for 53% of total import value. However, in the period 2001 – 2005, the import value of essential oils declined by 1% annually. The most important developing country supplier of essential oils was Argentina, with a share of 18%. Between 2001 and 2005, Argentina's share in total imports of essential oils increased by 14% annually.

Although natural gums, resins and balsams account for only 15% of total imports, making them the third most important product group, it was the only product group which increased, demonstrating an annual growth of 26% in the period between 2001 and 2005. The most important developing country supplier in this product group was Sudan, accounting for 57% of the import value of natural gums, resins and balsams.

India plays a particularly important role in the UK food colouring market. India not only supplies raw materials for food colours, it also supplies ready-to-use food colourings through 2 major companies: Neelikon Food Dyes & Chemicals Limited and Roha Dychem Limited.

## Exports

The United Kingdom is the fourth largest exporter of natural colours, flavours and thickeners in the EU and can be considered as a large-sized exporter. In 2005, exports amounted to 20.0 thousand tonnes with a value of € 157 million, representing 12% of total EU export value. In the period between 2001 and 2005, export value decreased by 4%, which is therefore in line with the EU average. In 2005, United Kingdom exports of natural colours, flavours and thickeners consisted of essential oils (52%), natural gums, resins and balsams (16%), pectates, agar-agar, mucilages and thickeners (14%), natural colours (13%), flavours (5%) and manioc starch (0%).

## Opportunities and threats

- The UK is a net importer of natural colours, flavours and thickeners; developing countries account for an import share of 45% which is larger than the EU average (36%). This indicates that developing country exporters are in a strong position to export to the UK.
- The UK is known to import a lot of raw material which is processed into food ingredients which are then exported. Many products from developing countries reach the food industries in other EU countries through the UK.

## Useful sources

- EU Expanding Exports Helpdesk - <http://export-help.cec.eu.int/>  
Go to: trade statistics.
- Eurostat – official statistical office of the EU - <http://epp.eurostat.cec.eu.int>  
Go to: 'themes' on the left side of the home page - 'external trade' - 'data – full view' - 'external trade - detailed data'.

### 3. Trade structure

#### Trade channels

The UK is covered by the EU distribution network for natural colours, flavours and thickeners which consists of a relatively small number of multinational processors, traders and agents. Therefore, the trade structure in the UK cannot be described separately from the trade structure given in the survey covering the EU market.

The market for colours and flavours is dominated by compounders, which supply the largest food manufacturers. These multinational processors are often vertically integrated including import, production/processing, marketing and sales. Moreover, they are often integrated horizontally as well to include many different, but related products (i.e. colours and flavours). In 1998, the shares in the UK market of the major manufacturers of natural food colours were as follows: Overseal (27%), Chr. Hansen (22%), Sensient Technologies Corporation (15%), Hoffman-La Roche (12%), Phytone (12%), others (11%). The share in the flavours market of Sensient Technologies Corporation was approximately 7.5% after the acquisition of Pointing Holding Ltd. in 1999 (Competition Commission of the UK, 1999).

In general, manufacturers supplying food colours to UK customers handle the distribution themselves. They have sales offices in many different countries, including the UK, to cover specific countries or regions. IFF, for example, has sales offices in 11 EU countries. Although smaller markets such as Ireland are often covered by sales offices located in other countries, larger markets such as the UK are generally covered by one office dedicated solely to that market. The reasons for the multinationals to have offices in many different countries are market coverage and knowledge of customer requirements. By having offices in different countries, they can reach more buyers and gather more specific information about country, regional and company specific requirements. This enables them to compete better with other suppliers.

Sometimes, the multinationals use a separate distributor. CP Kelco for example, has appointed S Black to distribute its range of hydrocolloids to the UK food and beverage industry (Foodnavigator, 15-6-2006). There are two main reasons for the existence of UK-based distribution intermediaries in the market for ready-to-use natural colours, flavours and thickeners: the need for readily available customer service and for just-in-time delivery. Moreover, smaller food manufacturers in the UK are also mainly supplied by independent traders and agents. Similar to the compounders, some traders have set up local offices in different countries from where they sell their products. Sometimes, local sales offices have their own purchasing department. They basically operate independently, but under the same flag.

The EU-wide scope of the multinational processors, traders and agents requires that developing country exporters assess carefully the channels through which country and company products reach end-users. The location of end-users is often different from where the products are imported. Many thickeners such as locust bean gum, which are sold to UK buyers by the sales office of Danisco for example, might come from one of the production facilities in Denmark. This means that products from a developing country exporter aiming to supply large food manufacturers in the UK might have to go to Denmark first.

Major compounders, traders and agents active in the UK market for colours, flavours and thickeners are listed below. Many of the major players are multinational companies which are mentioned in the survey covering the EU market. For each company, an indication is given of the location of the headquarters, production facilities or sales offices. Note that only those offices and facilities are mentioned which are active in the markets for colours, flavours or thickeners:

- Overseal Food Ltd. (<http://www.overseal.co.uk/>): leading supplier of colours and food ingredients in the UK



- Chr. Hansen (<http://www.chr-hansen.com/>): largest producer of colours in the world, based in Denmark, supplier of colours, flavours, cultures, enzymes and more.
- Sensient Technologies Corporation (<http://www.sensient-tech.com>): second largest producer of colours in the world and sixth largest flavour company. Acquired amongst others Pointing Holding Ltd. in the UK.
- Phytone Limited (<http://www.phytone.co.uk/>): major manufacturer of natural food colours
- Givaudan (<http://www.givaudan.com>): largest flavour company in the world (acquired Quest in March 2007), based in Switzerland, buying essential oils and other flavour ingredients. Has a production facility, 2 creative offices and 2 sales offices in the UK.
- International Flavours & Fragrances Ltd (<http://www.iff.com>): manufacturer of flavours. Has a manufacturing plant, a creative laboratory and a sales office in the UK.
- Danisco (<http://www.danisco.com>): Danish supplier of value-added ingredients such as colours, emulsifiers, essential oils, hydrocolloids, etc. Recently purchased Rhodia Food Ingredients. Has, amongst others, a production facility for flavours in the UK.
- Firmenich (<http://www.firmenich.com>): third largest flavour company in the world, based in Switzerland, buying essential oils and other flavour ingredients. Has 2 offices in the UK. Distributes its products through S. Black.
- Arthur Branwell & Co Ltd (<http://www.branwell.com>): manufacturer of gums and hydrocolloids (Arabic gum, guar gum, locust bean gum, carrageenan).
- Honeywill & Stein (<http://www.honeywill-stein.com>): distributor of colours, flavours and thickeners

Other companies active in the UK market for natural colours, flavours and thickeners are: Treatt PLC, Ringe & Kuhlmann, Bush Boake Allen, Haarrman & Reimer Ltd., Cargill, Aroma Trading, Fuerst Day Lawson, Tate & Lyle, Frutarom Industries Ltd, Kanegrade, Symrise, Diana Vegetal SA, GNT International B.V.

### Trends

- The consolidation in the EU market for colours, flavours and thickeners is also applicable to the UK market.
- Another trend is the increasing production scale. Particularly the large companies invest in upgrading the capacity of their production facilities.

### Useful sources

- FIAI (<http://www.faia.org.uk>): Food Additives and Ingredients Association
  - BEMA (<http://www.bemaorg.org>): The British Essence Manufacturers' Association
- For more suppliers of colours, flavours and thickeners: <http://www.thomasglobal.com>.

## 4. Prices and margins

### Prices and margins

Please refer to the CBI market survey covering the EU market for prices of natural colours, flavours and thickeners. The price indications given there are the best reference point for prices in the UK. If any price differences exist, they are the result of differences in transport costs and individual buyer preferences for product origin, quality, packaging, etc. These differences are considerable both between countries and within countries. Nonetheless, global market prices as mentioned in the survey covering the EU market are the basis for price calculations in every country. Actual prices are dependent on negotiation with partner companies.

The margins charged by different intermediaries in the trade of natural colours, flavours and thickeners are influenced by many different factors. These include the product type, the current and expected future harvest situation, the availability or number of sources for the particular product, the level of demand and the trend in prices. Particularly margins for colour and flavour compounders in the UK have been under pressure from imports in the last decade (Ex post evaluation of mergers, Competition Commission of the UK, 2006).

**Useful sources**

- The Public Ledger (<http://www.public-ledger.com>): Prices for selected colours, flavours and thickeners
- MCX India (<http://www.mcxindia.com/>): Prices for menthol and guar
- Chemical Marketing Reporter
- Quarterly Review of Food Hydrocolloids: Prices for hydrocolloids
- Organic Trade Services (<http://www.organictrade.com/>): Prices for organic products

**5. Market access requirements**

As a manufacturer in a developing country preparing to access the United Kingdom, you should be aware of the market access requirements of your trading partners and the UK government. Requirements are demanded through legislation and through labels, codes and management systems. These requirements are based on environmental, consumer health and safety and social concerns.

**Legislative requirements**

National legislation in EU countries is compulsory for all products traded within the country concerned. Therefore, as an exporter in a developing country you have to comply with the legislative requirements which are applicable to your products. For information on legislation go to 'Search CBI database' at <http://www.cbi.eu/marketinfo>, select your market sector, and the EU country of your interest in the category search, click on the search button and click on legislative requirements for an overview of all documents on legislation in your country of interest.

**Non-legislative requirements**

Social, environmental and quality-related market requirements are of growing importance in international trade and are often requested by European buyers through labels, codes of conduct and management systems. For information on non-legislative requirements, go to 'Search CBI database' at <http://www.cbi.eu/marketinfo>, select your market sector and the EU country of your interest in the category search, click on the search button and click on your subject of interest under non-legislative requirements for an overview of all documents on the subject concerned in your country of interest.

**Packaging, marking and labelling**

For general information on packaging, refer to the survey covering the EU. You can download information on requirements on packaging, marking and labelling in specific EU markets from <http://www.cbi.eu/marketinfo>.

**Tariffs and quota**

Tariffs and quota are set by the European Commission and are the same for all EU countries. Refer to the survey covering the EU for more information.

**Useful sources**

- CBI Database <http://www.cbi.eu/marketinfo>
- Taric Homepage [http://europa.eu.int/comm/taxation\\_customs/dds/en/tarhome.htm](http://europa.eu.int/comm/taxation_customs/dds/en/tarhome.htm)
- Directorate General XXI [http://europa.eu.int/comm/taxation\\_customs/common/publications/info\\_docs/taxation/index\\_en.htm](http://europa.eu.int/comm/taxation_customs/common/publications/info_docs/taxation/index_en.htm)

**6. Business practices****Selecting a suitable trading partner**

New suppliers of natural colours, flavours and thickeners are likely to meet with resistance from buyers, as this is a very conservative market depending to a great extent on trust regarding supply and quality. Producers and buyers also closely guard information and "secrets". Once stable trading relationships have been established, however, reliable markets can be gained.

Due to the restraints of buyers of natural colours, flavours and essential oils regarding new suppliers, a common procedure in this market is for buyers to send an agent to the producing country, to visit potential suppliers. However, it is also common for exporters to contact buyers. In many cases, first contact is preferably made by e-mail. This e-mail should include a quotation with a material safety data sheet and a technical data sheet, quantities, prices, delivery times, etc.

As in many other industries, price/quality ratio is the main criterion which importers use to select their supplier. Other important criteria are related to reliability. Food manufacturers like Cargill need constant supplies of basic raw materials. They check the financial stability of potential suppliers and what kind of measures the companies take to deal with disappointing harvests and shortages. Large companies like Cargill also spread risks by sourcing from multiple suppliers.

A major trader in natural ingredients for food products, Danisco, performs a commercial, technical and qualitative audit of a potential supplier of raw materials, before selecting a new supplier. They will look into documents such as the annual report, the banker's credit report and product range information.

Note that processing of the raw material is not always preferred by importers. Some of them have their own processing facilities which add value to the product and increase their margins.

### Reaching an agreement with your trade partner

Buyers will often request a sample for approval before actual shipment takes place. The sample should be accompanied by some of the following documents, depending on the requirements of the buyer:

- Material safety data sheet
- Technical data sheet
- Pesticide residue analysis
- GMO-free declaration
- Declaration of non-animal product derivatives
- Kosher and Halal certificates
- Organic certificate
- Fairtrade certificate

(ITC's marketing manual for organic spices, herbs and essential oils, 2004).

The buyer will carefully analyse the sample and test its physico-chemical quality. Samples should be representative of the complete shipment to prevent procedural problems. Reliability of delivery in terms of product specifications is mentioned by importers as a critical condition for a good trade relationship.

Natural ingredients are agricultural products which depend on weather conditions for their production. The quality of these products is difficult to control. Large buyers, such as Nielsen Massey (vanilla) often send inspectors to audit their suppliers with the objective of controlling quality as much as possible.

Buyer and supplier should agree on terms of payment in advance. The most commonly used terms of payment are the *Letter of Credit* (L/C) and *Cash Against Documents* (CAD). When using a L/C, risks are divided between buyer and supplier. The supplier only receives payment after the goods are consigned to a carrier and the buyer only receives the goods after payment. CAD carries the greatest risk for the exporter as the exporter will only receive payment when the buyer picks up the goods. Other payment terms which carry even more risk for the exporter are bank transfers after 30 days and consignment. In case of co-operation agreements with overseas companies, payment terms could also include periodical payments. Once trading relationships are established, clean payments are often used. The selected payment method often depends on the degree of trust between buyer and supplier.



Export terms of sale determine which costs are covered in the price of the cargo, at which point ownership transfers to the buyer and at which point responsibility for the cargo is transferred. The most commonly used terms of sale are FOB (Free on Board), CFR (Cost and Freight) and CIF (Cost, Insurance, Freight). It is recommended that quotations to European buyers of natural colours, flavours and thickeners should be made on a CIF basis. However, supplier and importer are free to negotiate and agree whether quotations and subsequent trade are based on CIF or FOB prices. Special attention should also be given to contract fulfilment in reference to contingencies which might occur while the sale order is being processed, shipped etc.

### Cultural differences

A profound knowledge of the British business culture is one of the main keys to a durable relationship. In spite of all modern communication tools, the personal relationship with a trading partner often decides a durable co-operation. The general business culture of the United Kingdom is described below.

- Polite, direct with an understated use of language.
- Treats counterpart as equal but expects respect for achieved status/position. Wait till your counterpart assigns you a seat.
- Extremely task-oriented – ‘hello, nice to meet you’ and then straight to the point – although this may confuse an exporter, who thinks his trading partner is relationship building. Questions are purely ritual and over very quickly.
- A British trading partner will give the exporter the opportunity to sell himself, his company and his products.
- He will be interested in the track record/achievements of your company and your products.
- When convinced, he will be prepared to give it a try on the basis of a trial shipment.
- He becomes slightly irritated by small talk and formalities, preferring to get down to business. Do not talk about politics, religion and private/family matters.
- He expects his counterparts to have their own opinion and voice it, even when disagreeing.
- He expects counterparts to take initiative and expects assertive communication.

Internet provides many source on business practices and culture, such as <http://www.communicaid.com/british-business-culture.asp>. Please keep in mind that the above concerns general remarks. Therefore, when conducting business, use you intuition and an understanding attitude.

### Sales promotion

Common practices of trade promotion in the United Kingdom should not differ considerably from other European countries. In general, good care should be taken of existing contacts, by using prompt, constant and reliable communication. Letters of inquiry should always be replied to. An essential tool used in sales is a detailed and up-to-date customer database.

Please refer to CBI's *Export planner* and *Your image builder* for more information on this subject.

Assistance with market entry can also be sought through local business support organisations, import promotion organisations such as CBI and branch organisations focusing on natural colours, flavours and thickeners, or the food ingredients sector. Interesting *trade associations* in the United Kingdom are:

- FDF (<http://www.fdf.org.uk>): Food and Drink Federation
- FIAI (<http://www.faiia.org.uk>): Food Additives and Ingredients Association
- BEMA (<http://www.bemaorg.org>): The British Essence Manufacturers' Association
- Ice Cream Alliance (<http://www.ice-cream.org>): Association of ice cream manufacturers.

Trade fairs offer companies in developing countries the opportunity to establish contacts, promote their products and conduct EU market orientation. Major fairs of EU-wide significance

are mentioned in the Survey covering the EU. *Trade fairs* of interest in the United Kingdom are:

- IFE 2007 - International Food Exhibition: <http://www.ife.co.uk>
- Food Ingredients Europe (<http://europe2007.fi-events.com/>): leading trade fair in the EU food industry.
- The Ice Cream Alliance (<http://www.ice-cream.org/>): (30 October – 1 November)
- Natural Products Europe (<http://www.naturalproducts.co.uk>): trade fair for natural and organic products.
- Please also refer to the Export Marketing Guidelines on natural colours, flavours and thickeners.

Trade press can function as a means for gaining insight into market developments and competition, but can also have a promotional function. This concerns finding potentially interesting companies, as well as promotion of your own activities and products. Major trade press of EU-wide significance is mentioned in the Survey covering the EU. Trade press of interest in the United Kingdom is:

- Food News: <http://www.agra-food-news.com>
- Food and Beverage International: <http://www.foodandbeverageinternational.com/>
- Food and Drink International: <http://www.foodanddrinkinternational.co.uk/>
- Food Manufacture: <http://www.foodmanufacture.co.uk/>

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