

UK Food and Drink Manufacturing Sector — Overview, Trends and Opportunities

September 2020



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The report was written in September 2020 using desk research methodologies and drawing on numerous sources of publicly available information, as well as sources available to EI clients from the Market Research Centre at Enterprise Ireland.

Enterprise Ireland has commissioned KnowledgeWorks, an Irish market intelligence firm to produce this report.

For more information on KnowledgeWorks see:

www.knowledgeworks.ie

For more information on the Market Research Centre see:

www.enterprise-ireland.com/en/Export-Assistance/Market-Research-Centre/



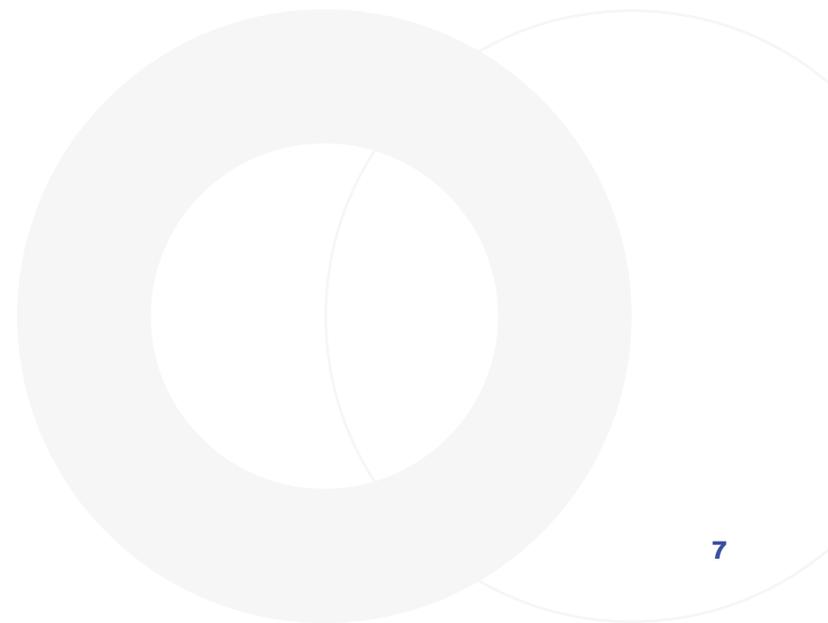
1. Industry Overview

Introduction to the Sector

The UK Food and Drink sector is the largest manufacturing industry in the UK. According to the Food and Drink Federation, the sector contributes £31.1bn to the economy. This makes it larger than both automotive and aerospace manufacturing combined.

The UK has a strong tradition of producing quality food and drink, from fresh food produce such as beef and cheese to global alcohol brands such as Gordon's London Dry Gin and Johnnie Walker. Building on this drinks heritage, the UK currently stands as the third largest drinks exporter in the world at \$10.2 Billion USD and the largest whisky exporter globally by a factor of six.

Food and drink manufacturing is also one of the more stable sectors in the UK, rising from 13% of the total manufacturing output in the UK in 1999 to 16% in 2019. The sector also sustained growth through the global financial crisis in 2008 proving its resilience to outside factors. This resilience will be soon tested again through Brexit's impact on imports and exports, as well as the yet uncertain long term impact of the global Covid-19 pandemic.

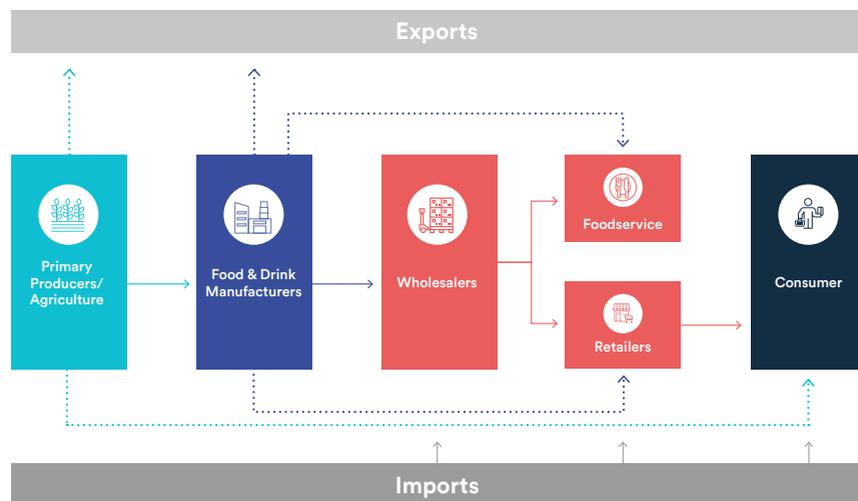


How the sector works

The food and drink sector encompasses the supply chain from the farmer right through to the retailers and restaurants and on to the consumer.

This flow of raw materials begins with the primary producers or farmers where it is then processed by food and drink manufacturers (who also process imported raw materials) before it reaches the end consumer either in the UK or in one of the UK's export markets.

This report will focus on the processors in this supply chain, the food and drink manufacturers, as well as the key trends and insights across each sub sector.



The potential impact of Brexit on this industry

The UK is very much dependent on imports to keep supermarket shelves stacked with the variety of products that British consumers demand.

Roughly 30% of all food consumed in the UK is imported from the EU with the UK almost solely dependent on EU countries for a number of specific products.

Exports are also potentially under threat, with more than £14 billion worth of the UK's food exports going to EU markets. Some categories and products are under particular pressure, for example, 98% of British lamb is exported to the EU.

New regulatory barriers, including customs declarations, are unavoidable and in the event that no alternative trade agreement is established, exporters potentially face tariffs under the WTO or UK Global Tariff regime. This will impact exports of UK produced food products as well as supply to UK consumers.

Changes in the industry brought about by the Covid-19 pandemic

Lockdown and post lockdown restrictions on movement in the UK brought about a huge upsurge in online shopping, including grocery shopping.

However, foodservice is still reeling after months of restrictions, with this source of sales reduced in volume to food and drink manufacturers. The shift from on to off license sale of alcohol is having an impact on some drinks producers.

Food exports have been hard hit by the pandemic, with the FDF reporting a 12.7% drop in exports in the first quarter of 2020. Sales to the EU dropped by 17% with the closure of the hospitality industry during the second quarter.

One positive impact of the pandemic is the increased interest among UK consumer to purchase locally produced food products. Other positive impacts may become evident over time. A 'bounce back' plan of trade measures for the agriculture, food and drink industry has been announced by the UK government to help support businesses that have been impacted by coronavirus.

How the impact of both Brexit and Covid-19 develops over the next 12 months remains to be seen. There is potential for new opportunity alongside significant threat. Enterprise Ireland will keep a watching eye on changes and how these might impact manufacturers.

Watch our social media channels for webinars with key opinion leaders to discuss these issues in the coming months.



2. Issues Impacting Food & Drink Manufacturing

UK government initiatives

The UK government is a key stakeholder to consider when looking at the UK food and drink manufacturing industry. From changing of agricultural regulations to promotional activities there are several ways the UK Government influences the sector and its constituents.

2016-2020 International Action Plan

We have just come to the end of the government's 2016-2020 International Action Plan to accelerate growth in food and drink manufacturing. This plan was focused on international trade, aiming to "boost the confidence and ambition of those wishing to export". The pillars of this campaign were: encouraging first time exporters; increasing capability and innovation in the sector and opening trade opportunities with new markets.

The action plan identified key potential markets for UK food and drink manufacturers, such as India, USA, and Latin America. Also mentioned in this report are France and Germany as potential markets which in hindsight, post Brexit, may not be as suitable as previously envisaged for UK exporters.

Made Smarter UK

An industry-led review in 2017 outlined the downfalls and issues in digital adoption in UK manufacturing. This review identified a lack of effective leadership of industrial digitalisation, poor levels of adoption particularly among SME's and under-leveraged innovation to support start-ups. The findings of the review led to the formation of Made Smarter UK which focuses on innovation and automation adoption to help improve the competitiveness of UK manufacturers in the global market.

Made Smarter aims to make the UK the "leader in industrial digitalisation by 2030". It uses its government funding to help provide advice on production, grant funding around technology adoption and access to student placements etc.

This may be of interest to Irish companies: there may be an increased willingness to adopt new technology within UK food and drink manufacturers as any risk will be reduced through education and funding provided by organisations like Made Smarter.

Bounce back from Coronavirus plan

In June 2020 the UK government announced a 'bounce back' plan to help UK agriculture and the food and drink industry recover from the effects of coronavirus in light of falling exports. Features of the plan also bolster efforts to export beyond the EU, led by the Department for International Trade (DIT). The measures announced include:

- Launch of a GREAT DIT Food & Drink Exporting Masterclass, an extensive and bespoke programme of webinars.
- Launch of Food & Drink SME E-commerce Accelerator Pilot to leverage DIT's E-exporting Programme to increase the level of international e-commerce support for food and drink SMEs, including agri-tech.
- Promote 50 Food and Drink Export Champions to stimulate aspiring exporters, while utilising International Trade Advisor specialist networks focused on agri-food.
- Announce the first Defra Agri-food Counsellor serving the UAE and wider Gulf Region, with the role focussing on supporting our food and drink sector and representing the interests of UK businesses already exporting to the area, as well as those looking to export for the first time.
- Launch of a programme of physical and virtual events, using innovative, interactive software to connect buyers, promote the UK and reach international markets.
- Leveraging Defra's Food is GREAT campaign, which will extend into the UAE and the EU later this year, to provide impactful and targeted activity in priority export markets, such as USA, China and Japan.
- Two Virtual Investor Roundtables chaired by Lord Grimstone, Minister for Investment, with agri-food and drink, and agri-tech companies to inform the development of the UK's investment strategy, the UK Agri-Tech International Strategy and the launch of Phase 2 of the High Potential Opportunity Programme.
- Uplift of UK Export Finance's "Exporters' Edge" campaign to further outreach and engagement to identify and respond to the needs of the industry and raise awareness of how UKEF and Trade Finance can help businesses win and fulfil export contracts

Workforce outlook

The food and drink manufacturing sector is a large provider of jobs to the UK, with 450,000 jobs provided by the sector, as per the FDF.

As opposed to the common image proposed of these jobs being seasonal and low paid, many of the almost half a million jobs provided are above the average for the UK economy in terms of earnings and tenure. Furthermore, in comparable sectors, the average salary of a food and drink engineer is higher than that of a civil engineer or an aerospace engineer at £48,155.

Additionally, according to a report published by the University of Cambridge, the average tenure of an employee in the sector is just under nine years with only 6% of the jobs in the sector being temporary.

In recent years there has been a particularly high employment rate across the UK, with unemployment figures at their lowest point since 1975. This has resulted in the food and drink manufacturing sector struggling to fill vacancies nationwide as the labour market tightens. Furthermore, it is expected that the industry will need a further 140,000 positions before 2024 to keep up with the population growth in the UK.

Also of concern from a workforce perspective is the potential impact of Brexit on the EU workers in the sector. According to ONS figures, the food and drink manufacturing sector currently employs 106,000 EU workers, constituting one quarter of the total workforce in the sector. This makes the sector dependant on central government to put in place an immigration system that retains access to this workforce.

Currently, the transitional agreement sets out that EU citizens will likely have full freedom of movement in and out of the UK until 2021. After that, EU citizens with over 5 years in the UK will be granted settled status with new arrivals having to apply for a work visa.

If the influx of immigrant workers from the EU was to slow significantly post Brexit due to these visa requirements, vacancies would rise notably across the sector and there would be a pronounced skill drain in food and drink manufacturers.

Automation

As referred to earlier, UK food and drink manufacturing is far from being a world leader in industrial automation. The sector lags behind when it comes to technology adoption and process engineering. This was clearly identified in the Made Smarter report which outlines the failings of the industry.

Globally, the UK ranks 22nd when it comes to installed industrial robots per 10,000 employees. In 2017, figures from the Independent Federation of Robotics (IFR) revealed that the UK accounted for merely 0.6% of annual global shipments of industrial robots and 3.5% of European shipments. This metric of automation adoption positions the UK behind countries such as Slovenia, Belgium and Finland. The IFR diagnosed that British industry is in need of investment to modernise and improve productivity.

On an SME level across the UK, there are investments being made by MadeSmarter and MakeUK in the form of matched funding grants and training in the automation and industrial digitisation space. This may create a greater willingness to adopt these technologies across the sector which could grow demand for solution providers.

On an industry level, it remains to be seen whether enough investment is being made into automation to cause significant change. Over the coming years, this issue may be forced on manufacturers as they seek to improve productivity and efficiency in the face of their EU competitors.





3. Trends in Food & Drink Consumption

Buy British

A new trend towards “Buying British” is evident across the shelves of British supermarkets. For example, brands like Arla foods have decided to place to British flag prominently on their products.

This is bolstered by the Department of Environment Food & Rural Affairs’ FOOD is GREAT” campaign designed to improve the perceptions of British food domestically and internationally. While this is not unfamiliar for Irish consumers as similar campaigns have been prevalent in Ireland for a number of years, it is notable as it is part of a wider shift in the market.

This shift has only been heightened by the recent COVID-19 pandemic as there has been an onus on consumers to ‘support local’. According to the Food Standards Agency (FSA), there has been a distinct move towards ‘local’ food purchasing with 35% of consumers stating they are ‘buying local’ more often than pre-Covid.

From a government perspective, across Europe we have seen a call for what the French Agriculture Minister has coined as “food patriotism”. The UK is no different, with calls for government to back British food during the pandemic. In the House of Commons the President of the National Farmers’ Union of England and Wales, Minette Batters, called for 100% procurement of British food wherever possible.

It’s difficult to know whether this global trend is due to the pandemic or whether ‘food patriotism’ is around to stay.

Premiumisation

There is an undeniable appetite for premium products across the board in the food and drink sector.

British consumers now expect more from their supermarket purchases and show a growing desire for authentic and fresh produce previously only found in artisan producers. Consumers perceive these products as being healthier and of higher quality, granting more satisfaction to the consumer for their purchase.

Food and drink manufacturers are bridging the gap between traditional mass market products and luxury products to produce premium products that retain the volumes required for these producers. The examples of this trend are ample: the craft boom in beer, the prevalence of sourdough or premium baked goods on the shelves, better quality ready meals and the craft gin rise throughout Britain. It is clear that consumers are now willing to pay higher prices for 'value-added' products.

The benefits to the manufacturer are clear as premium products provide greater margins and strong associations for UK brands.

Whether this trend is recession proof is yet to be seen as the likely roadblock for premiumisation is the tightening of consumer wallets that comes in a downturn.



Health conscious consumer

Health consciousness in food choices has been a steadily growing trend in the UK over the past decade, impacting consumer preferences as they seek healthy options.

For example, more and more UK residents are choosing meat free or meat light diets. One in four Marks & Spencer's shoppers chose a flexitarian diet in 2020. This has led to the growth of organic, healthier products into the mainstream that may were once considered niche products. It has also been a huge driver in new product development across the sector as emerging brands try to capture their portion of the trend and established brands aim to pivot towards the tastes of this new consumer. This is evident across the board, from the prevalence of milk alternatives such as pea and oat milk replacing cow's milk to the rise of plant-based alternatives to traditional meat options.

As well as a consumer led change, there has been an emphasis on better health from the UK government.

Public Health England has set industry targets of a 20% sugar and calorie reduction for 2020 in a number of food categories. In April 2018, the Soft Drinks Industry Levy (SDIL) commonly known as the 'sugar tax' was introduced to reduce childhood obesity and led producers to reduce the sugar content in their soft drinks. In July 2020 the UK government announced a controversial new strategy to tackle obesity and protect the NHS.

This has been a catalyst for change in soft drink brands who have been steadily losing market share to healthier substitutes in the sector. Most publicly we have seen Coca-Cola rebrand 'Coke Zero' as 'Coke Zero Sugar' leaving nothing to the imagination by emphasising the reduced sugar content of their soft drink.

This trend of repositioning traditionally unhealthy foods is likely to continue globally as governments continue to tax and disincentivise junk food and drink products.

Private Label

The UK has seen a substantial growth in private label products over the last number of years. The influx of discounters such as Aldi and Lidl, who are very own-brand orientated, has made consumers question the long-held notion that branded goods and products are of higher quality.

Consumers now view private label as a viable option that can allow them to eat well whilst not impacting the wallet as much as the brand name alternative.

To compete with Aldi's "like brands, only better" approach, supermarkets have ramped up their private label production. This has been a successful endeavour as the quality of own brand products has increased, so too have the profit margins of their respective supermarkets. This has been aided by the ability today to quickly react and mimic leading products in the market, meaning their own brand products no longer lag behind brand names from a quality and new product development perspective. According to Kantar, own brand products now account for over half the sales in UK supermarkets (52.7% in 2019).

Successful own brands also provide supermarkets with a degree of leverage with suppliers as they have been able to take ownership of their own shelf space. We are now at the point where private label is one of the main volume drivers for many of the product categories in supermarkets.

An example of this is in bread and pastry products where the recent value growth in the sector is attributed to premium own brand products that have mirrored artisanal baked products.

Private label products themselves are manufactured by independent manufacturers who often have their own branded products on the same shelves.

These food and drink manufacturers must balance the benefits of supplying own brand products to supermarkets and focusing on their own branded products. They hope to benefit from the added volume of sales by producing this perceived lower value product but must consider the risk of eating into demand for their own higher margin brand products. Also by engaging in this process they build stronger relationships with retailers as they become both suppliers and partners.

More and more this is a dilemma that food and drink manufacturers have to consider as private label continues to erode the market for their branded products.



4. Food and Drink Category Profiles

Bread & Pastry Products

Businesses
2530

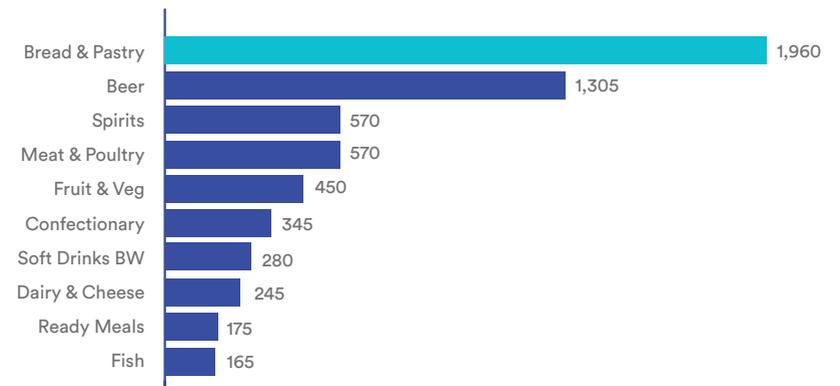
Employees
74,277

Turnover
£7.6 billion

There are around 2,500 bread and pastry manufacturers in the UK, making it one of our largest categories.

However, a large and above average proportion of these are small businesses, with 46% having less than five employees and 86% with a turnover below the £1m mark.

Number of businesses in category with small turnover (<£1M)



According to the Federation of Bakers, three companies alone account for almost three quarters of the bread market by value. These are the three largest manufacturers in the sector: Allied Bakeries (Kingsmill), Hovis and Warburtons. Aside from these three, private label represents a large portion of the remaining volume of sales.

The William Jackson Food Group supply private label bread to the Co-Op supermarket, in a new deal announced July 2020, taking over from Allied Bakeries. Allied previously lost the contract to supply Tesco private label and as a result ceased all bakery production at its Cardiff site.

The Federation of Bakers reveals that large plant bakers account for 85% of volume produced with the remaining 15% spread across a large pool of small manufacturers, often high street bakers.

Industry trends

Bread remains a staple in UK shopping trolleys. 99.8% of British households buy bread regularly and this equates to nearly 11 million loaves purchased every day. This makes bread the most popular food item in UK households, according to Kantar.

The market today is driven by the movement of consumer tastes towards fresh, handcrafted breads. This demand was initially filled by smaller independent suppliers, but now large manufacturers have started to take advantage of this trend.

While still popular, growth in bread has been held back by price rises and the growing health trend. Players in the sector have made an effort to capture some of the lost demand from health-conscious consumers launching healthier alternatives and vegan options. For example, Allied Bakeries (Kingsmill) launched a white bread with high fibre claims, which also includes added vitamins and minerals.

Some key companies in this category

The three largest manufacturers in the sector are Allied Bakeries (Kingsmill), Hovis and Warburtons.

Other manufacturers in this category:

- Roberts Bakeries
- Braces Bakery
- William Jackson
- Village Bakeries
- Carrs Foods
- The Polish Bakery
- Nicholas & Harris
- Henllan Bread
- Crosta & Mollica
- David Wood Baking
- Garth Bakery

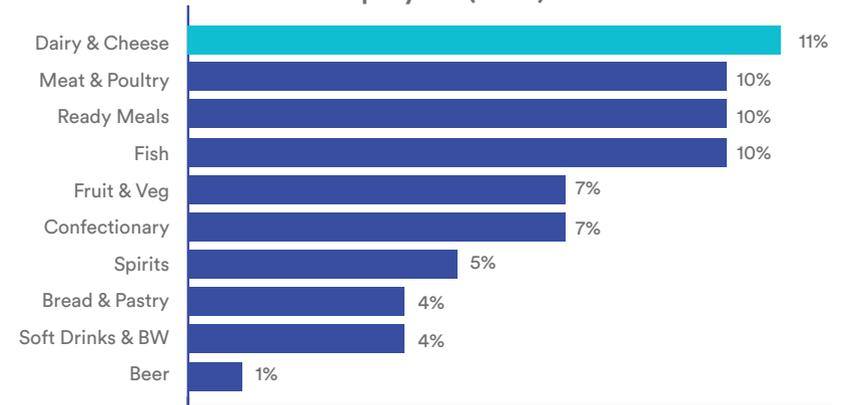
Dairy & Cheese

Businesses	370
Employees	24,435
Turnover	£10.5 billion

16% of companies in this category have a turnover of more than £10 million: however, this is a small category so this equates to just 60 businesses.

In terms of employees, 40 dairy & cheese businesses (or 11%) employ more than 100 people.

% of businesses in each category which are large employers (100+)



The UK dairy & cheese industry processes and distributes over seven billion litres of milk each year. A further 3 billion litres is converted to cheese with the remainder turned into butter, cream, milk powders and condensed milk.

Dairy products continue to be a staple in British fridges with 96% of adults buying UK produced milk and a further 94% buying UK produced cheeses.

Dairy UK, the industry association, has set specific environmental targets for the industry to achieve by 2025:

- 30% reduction in carbon related energy use at processing sites
- 30% reduction in food waste from site in line with EU Regulations
- Elimination of single use plastic in dairy packaging, improving recyclability where possible.

Industry trends

A significant trend in dairy has been the growth of milk alternatives as the popularity of traditional cow's milk begins to wane. New substitutes to dairy milk such as oat, pea and almond milk contributed much of the volume growth in 2019. This growth is driven by the desire for healthier options by consumers from their milk products.

In July 2019 Mintel estimated that almost one quarter of British people used one of these plant based milk options, although 96% of the market remains dairy milk. The majority of take up of plant based was among 16-24 year olds, according to Mintel.

Private label continues to dominate the sector in terms of value across milk, butter and cheese. Competitive prices, promotional activities and broadening product ranges are central to this dominance of the sector.

Butter sales have seen a resurgence in growth as the health benefits of natural butter has come to the fore. The same can't be said for margarine and spreads which saw a decline in 2019 with large players such as Kerrygold and Muller losing shelf space in key retailers.

Cheese is seeing a boost from the growth of the adult snacking trend and now proving popular with adults as well as children.

Some key companies in this category

- Arla Foods Ltd
- Muller UK
- Ornuva Foods UK
- Dale Farm
- Ornuva Foods UK
- Dairy Crest
- Meadow Foods
- Dale Farm
- Yeo Valley
- Glanbia Cheese

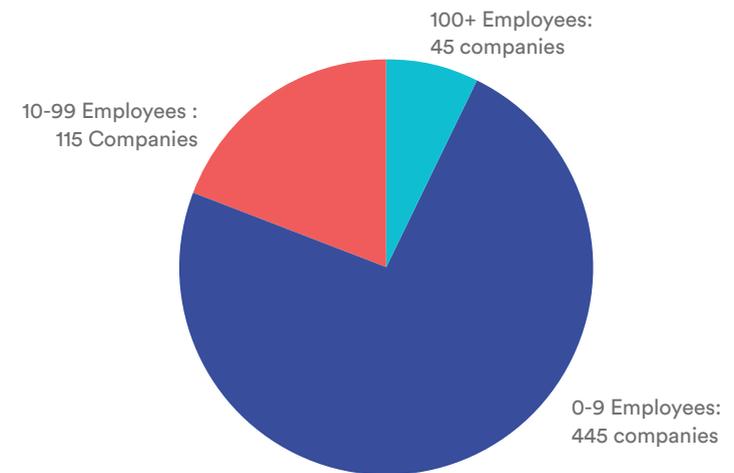
Fruit & Vegetables

Businesses	605
Employees	33,693
Turnover	£71 billion

There are 605 businesses in the fruit and vegetable processing/manufacturing sector in the UK. Fruit and vegetable processors are one of the smaller employers in the UK FDM industry with 74% of businesses in this sector employing less than 10 people and 60% employing less than five.

As the total number of businesses is relatively small (605) this means that there are just 45 businesses employing 100 or more people.

Fruit & Vegetable processors: employee numbers



Products range from lightly prepared fruit and vegetables through to processed items such as jams and nut butters.

Industry trends

Consumers' ever-increasing awareness of the health benefits of foods is driving demand for fruit & vegetables. Plant based foods overall are growing in popularity, with vegetarian, vegan and flexitarian diets currently in vogue, and this is helping drive sales in this category.

According to Euromonitor, transparency is also a key issue for UK consumers — and this has an impact on manufacturing concerns such as labour practices, and the environmental impact of processing fruit and vegetables.

Many UK consumers are keener than ever to 'buy local' for environmental reasons as well as to support their local economy.

Hot weather in 2018 and 2019 impacted yields and the effects of climate change mean this could be set to continue. Euromonitor says that growers may need to invest in greenhouses to better control the effect of weather on their crops but the cost of this would be significant.

Snacking is currently a significant food trend in the UK and the awareness of the health benefits of fruit make them a popular choice for eating between meals or on the go.

Some key companies in this category

- Bakkavor Foods
- Wm Morrison Produce
- Birds Eye
- SH Pratt Group
- The Hain Daniels Group
- Whitworths
- Gerber Emig
- Innocent
- Fresh Direct
- Pinguin Foods
- Empire World Trade
- DG Fruit UK
- Worldwide Fruit

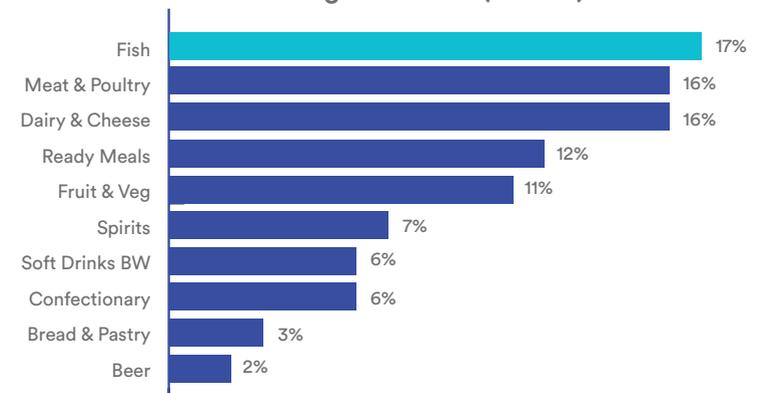
Fish & Shellfish

Businesses	300
Employees	14,193
Turnover	£3.0 billion

There are 300 businesses in this category, with 17% of them having a 'large' turnover of £10 million or more. This equates to 50 businesses.

Of the 300 fish and shellfish processors, 30 employ more than 100 people; 110 employ between 10 and 99 and 160 employ fewer than ten people. More fish businesses have a medium turnover (£10M+) than any other category.

% of businesses in each category with large turnover (£10M+)



The fish and shellfish processing industry is going through a period of change. It is an industry very much dependant on catch volumes i.e. higher catch volumes give processors more produce to prepare and sell on. These catch volumes are determined, in large part, by fishery regulations. For a long time these regulations have been determined by the EU and in 2021 responsibility will return to UK regulators. Seafood stocks are expected to increase because of this changeover in regulations.

The UK industry authority, Seafish, says that Humberside and the Grampian area of Scotland dominate the industry with over 60% of employment located in these regions. Seafish estimates that in Scotland, 59% of those employed in the sector were from non UK EEA countries, presenting a Brexit-related risk for the local industry.

Industry trends

Global demand for seafood is on the rise which is leading to higher prices in the UK. This is having a knock-on effect, with higher prices reducing demand in Britain. Salmon remains the most popular fish despite some fall in demand. Growth is being seen in alternatives such as prawns which are seen as providing a good source of protein at a lower price.

Growth due to the healthy attributes of fish is being held back due to lack of knowledge around preparation. The easier to cook fish often come in batter or breadcrumbs negating some of the health benefits from the raw materials of the product.

Some key companies in this category

- J Marr
- Youngs Seafood
- Whitby Seafoods
- Hilton Food Group
- Nomad Foods
- New England Seafood

Meat & Poultry

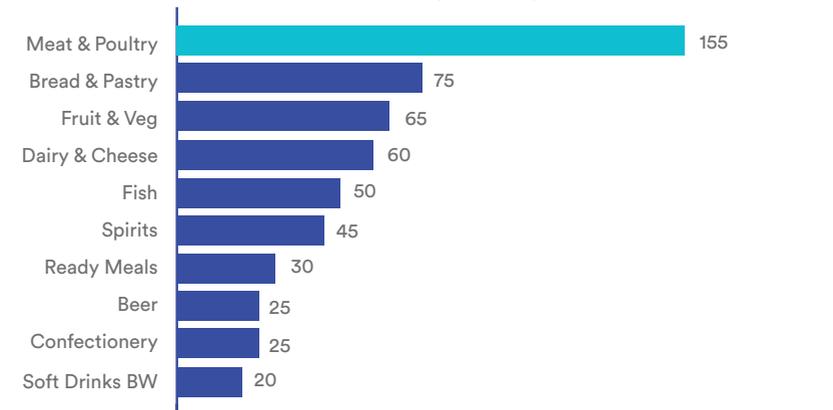
Businesses	1,000
Employees	98,577
Turnover	£19.7 billion

Meat & poultry is one of the larger categories in this industry, with 1,000 of these businesses in the UK.

In terms of size, meat & poultry businesses are about average in the industry, with around 10% employing more than 100 people and 42% employing less than 5.

In terms of turnover, relatively few meat & poultry processors fall into the Small (<£10 M) category. An above the average proportion of meat & poultry businesses are in the large turnover category, 16% of the total or 155 businesses.

Numbers of businesses in each category with large turnover (£10M+)



Meat & Poultry processors slaughter livestock to produce cuts for retail sale. The majority of products produced by the meat industry are from pigs, cattle and sheep. They are usually sold either as full carcasses, animal sections or smaller cuts like steaks and chops. Some of the meat produced also goes on for further processing into products like sausages, bacon and other cured meats, pies and other manufactured foods.

Euromonitor data shows that profit margins have increased in this sector from around 5.5% in 2013 to over 6% in 2018. During that time overall profits have also increased. Turnover in general across the sector is forecast to increase in the years 2018-2023.

Industry trends

Environmental concerns gaining traction during 2019/2020 were one of the factors which led to an increase in veganism and vegetarianism, bringing about a small drop in year on year growth in sales of meat products.

Commentators like the British Meat Processor's Association are fighting to defend meat's record and reputation in this area, with messaging around the relatively small environmental impact of British beef.

Environmental concerns have not had the same impact on poultry meat consumption as on meat. The growing awareness of poultry as a protein-rich and relatively convenient food is helping sustain consumption levels.

Automation of processes using software and other tools is a priority for the industry: labour shortages are a concern and more efficient processes and conditions could help safeguard against this threat.

Some key companies in this category

According to IBIS, the poultry processing companies holding the largest market share include:

- Boparan Holdings Ltd
- Moy Park Limited
- Avara Foods Ltd
- Cranswick Plc.

The largest meat processors are:

- Dunbia Ltd
- ABP Food Group
- Wm Morrison Supermarkets Plc
- Hilton Food Group Plc
- Cranswick Plc
- 2 Sisters Food Group
- Foyle Food Group
- Tulip Ltd.

Beer & Spirits

Businesses

1,980

Employees

28,953

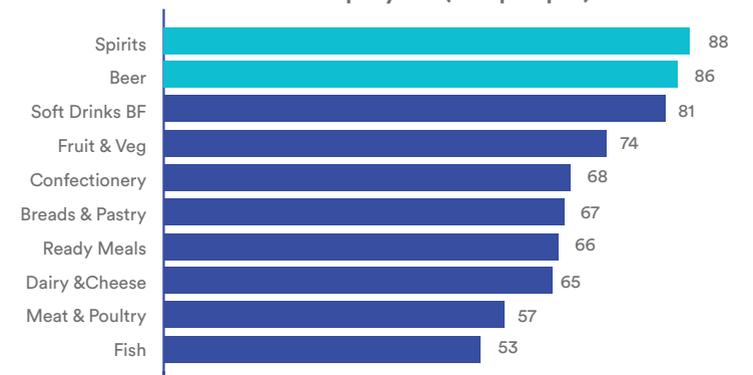
Turnover

£15.1 billion

Of the 2,120 beer companies, 90% are small, with a turnover of less than £1 million. Just 1% of the total has a turnover of over \$10 million – 15 companies.

Spirits companies number just over 600 and they are also a typically small employer.

% of businesses in each category which are small employers (<10 people)



The bulk of revenue in this sector comes from largest suppliers such as Heineken, Anheuser Busch and Diageo with just 2% of companies in this sector generating revenues over £10 million and 88% generating less than £1 million.

Industry trends

Beer

Premiumisation has been a growing trend in this sector for a number of years. Preferences are moving away from affordability towards quality and experiences. In response to this trend the number of independent breweries in the UK has doubled in the last five years with new premium beers reaching the market every month.

However, the growth of independent breweries has slowed of late as the large industry players look to capitalise on this premiumisation trend. By investing heavily in their own craft breweries or by purchasing existing ones they aim to capture market share held by independent breweries. For example, two of the biggest craft brands, Camden Town Brewery and Lagunitas are now owned by Anheuser Busch InBev and Heineken respectively.

Craft breweries have helped to remove the stigma around canned beverages that was once prevalent in the sector. 25% of beer is now sold in canned format. EebriaTrade, which sells alcohol direct to consumer in the UK stated that breweries which switched to cans in 2017 saw their rate of sales almost triple.

Consumer demand for no or low alcohol drinks has risen in line with growing health consciousness. Sales of products in this category have grown by 18% over the last five years and are set to grow by a further 12% by the end of 2022.

Spirits

A report by private equity firm, Growthdeck, revealed that turnover of the UK's independent spirits industry broke £2 billion for the first time, reaching £2.14 billion in 2017/18, up from £1.98 billion in 2016/17. This is driven by the trend towards gin as the preferred spirit for consumers in the UK.

Mirroring the craft beer sector, a significant number of new distilleries has entered the industry to capture their slice of the craft spirit pie. Entrants to the industry are often referred to as “ginentrepreneurs”. The number of gin distilleries has increased rapidly since 2014. This rapid growth can be attributed to the demand firstly for artisan and local spirits and also to the low barriers to entry for new distilleries. Gin, unlike whisky or cognac, does not require aging meaning that new companies can bring a product to market relatively quickly.

Some key companies in this category

Beer

- Molson Coors
- AB Inbev UK
- Heineken UK Ltd
- Carlsberg UK Ltd
- Diageo

Spirits

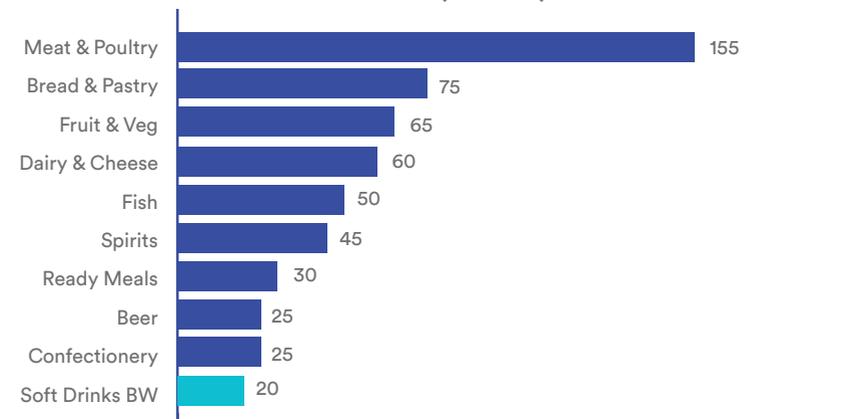
- Diageo
- Chivas Brothers
- Erdington Group Ltd
- William Grant & Sons Distillers

Soft Drinks & Bottled Water

Businesses	345
Employees	12,473
Turnover	£5.6 billion

There are 345 soft drinks and bottled water manufacturers in the UK. These have a greater spread among small and medium sized business – in terms of turnover – with just 6% (or 20 businesses) in the 'large' category of £10M+.

Numbers of businesses in each category with large turnover (£10M+)



In terms of employee numbers, these are generally small employers, with 81% employing less than 10 people, coming just behind beer and spirits manufacturers in this respect.

Industry trends

Soft drinks which are positioned as healthy drinks are experiencing ongoing growth in light of the ongoing interest in healthy eating.

In parallel with this, the new interest in low and no alcohol drinks is also driving growth in soft drinks.

In efforts to sustain growth in the sector traditional soft drink producers are investing significantly in the following areas:

- Reformulating existing products
- Innovating to produce new products with no sugar and low sugar
- Increasing availability of small pack sizes
- Investing in the promotion of drinks with low or no sugar

Recently there has been several product innovations in this sector, e.g. the introduction of Ready to Drink refrigerated coffee through brands like Honest Cold brew and Costa. There has also been a proliferation of plant based natural “energy drinks” such as Tenzing Natural Energy, Coca-Cola Energy and Purdeys and growth in kombucha and carbonated tea.

Some key companies in this category

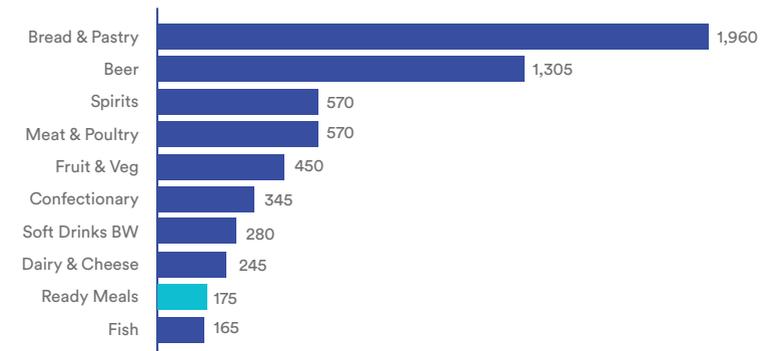
- Coca-Cola
- Britvic
- Danone
- Nestle Waters UK Ltd
- Lucozade Ribena Suntory
- Red Bull
- AG Barr
- Highland Spring
- Tropicana

Ready Meals

Businesses	250
Employees	35,096
Turnover	£4.3 billion

This is our smallest category, with 250 businesses involved in the manufacture of ready meals in the UK. Two thirds of these businesses are small, employing less than 10 people. However, an above average number is large, with 10%, or 25 businesses, employing more than 100 people.

Number of businesses in category with small turnover (<£1M)



Companies in this category manufacture chilled, frozen or canned meals. The image of these meals has improved in recent years, in both taste and health benefits, in line with consumer demands.

According to Euromonitor, the ready meal category performed well in both retail volume and current value terms in 2019.

Industry trends

The sector has benefited from growth in employment levels: meaning more consumers have less time to prepare and cook meals. At the same time, the drive toward healthier, more environmentally friendly eating is driving innovation in this space, with meal kits increasingly popular, and a continued demand for better quality vegetarian and vegan options, using high quality ingredients.

There is increased crossover between retail and food service, and this is very evident in the ready meal category, with retailers trialling various initiatives in-store. Own brand retailer ready meals are performing very strongly.

IBIS World has commented that companies in this category are focusing on the convenience attributes of packaging as well as the products themselves. In this context, improved quality of takeaway food and cooking at home kits will prove competitive.

Some key companies in this category

- Bakkavor Foods
- Birds Eye
- Northern Foods
- Greencore
- Kerry Foods
- Kraft Heinz UK

Confectionery

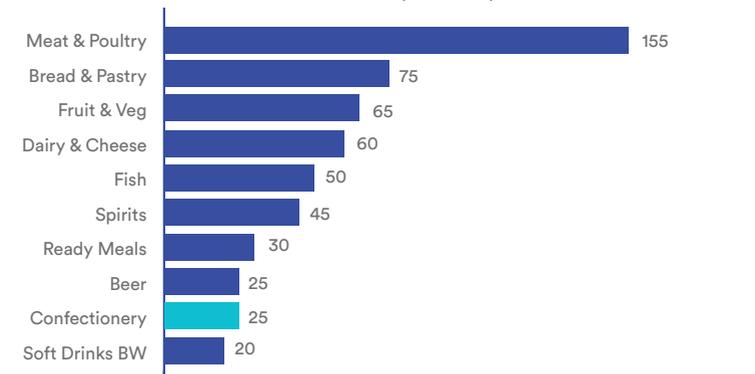
Businesses	420
Employees	17,383
Turnover	£4.6 billion

There are 420 companies involved in confectionery in the UK. These businesses are average in terms of their employment levels:

- 68% employ less than 10 people
- 25% employ between 10 and 100
- 7% employ more than 100 people.

Confectionery businesses are at the lower end of the scale when it comes to turnover, with just 6% having sales of more than £10M (compared with e.g. 17% of fish businesses or 16% of dairies). This 6% equates to just 25 businesses.

Numbers of businesses in each category with large turnover (£10M+)



Manufacture of confectionery in the UK includes processing of chocolate, sugar confectionery and chewing gum.

Industry trends

According to IBIS World the confectionery industry has performed weakly over the past five years, with revenue declining in every year of the period.

Factors contributing to this decline include the ongoing trend towards healthy eating, as well as fluctuations in the price of cocoa and the drop in value of the pound.

A key issue affecting this industry is the question over where manufacturing bases are located. The largest players are all multinationals, and production has gradually been moving out of the UK in recent years, with the exception of the Bournville plant, to which Mondelez returned from Poland following investment in automation and processes.

Some key companies in this category

- Mars Wrigley
- Nestle
- Barry Callebaut
- Mondelez Europe
- Divine Chocolate





5. Regional Overview — Key subsectors and manufacturers

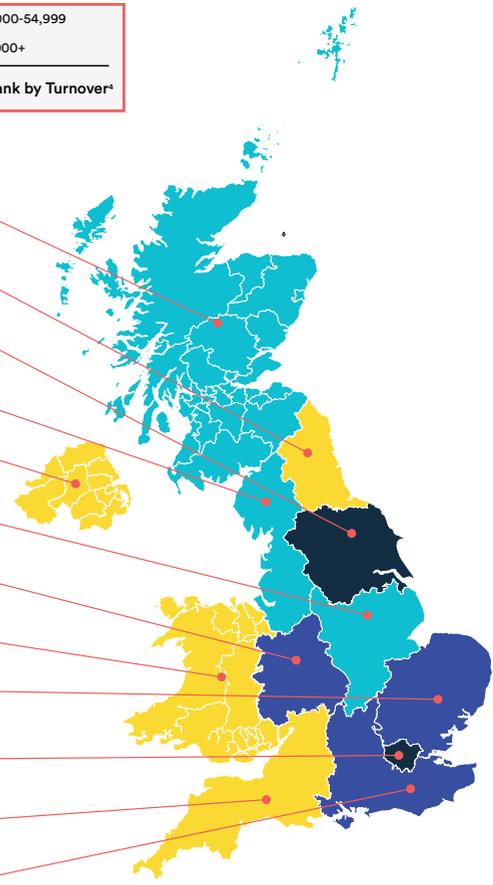
Food and Drink Manufacturing in the regions

Key: Employment Heat Map

Below 25,000	40,000-54,999
25,000 -39,000	55,000+

▲ Company Count¹ ↑ Employee² £ Turnover³ ■ Rank by Turnover⁴

Scotland	▲ 1,090	↑ 41,689	£ 11,989,719,000	■ 3
North East	▲ 310	↑ 6263	£ 943,316,000	■ 12
Yorkshire and The Humber	▲ 895	↑ 74,328	£ 15,125,640,000	■ 2
North West	▲ 1,125	↑ 49,708	£ 10,820,593,000	■ 5
Northern Ireland	▲ 505	↑ 23,525	£ 4,780,646,000	■ 9
East Midlands	▲ 675	↑ 46,266	£ 9,284,079,000	■ 7
West Midlands	▲ 830	↑ 39,978	£ 11,243,280,000	■ 4
Wales	▲ 510	↑ 14,220	£ 2,590,369,000	■ 11
East of England	▲ 830	↑ 29,934	£ 9,894,614,000	■ 6
London	▲ 1,595	↑ 62,100	£ 15,472,591,000	■ 1
South West	▲ 1,105	↑ 24,312	£ 4,057,530,000	■ 10
South East	▲ 1,230	↑ 35,074	£ 8,253,851,000	■ 8



London

London is home to many of the head offices of the major manufacturing companies accounting 15% of the food and drink turnover in the UK.

However London accounts for just 2% of the UK's employees in large manufacturers as many of the large factories serving the population of London are placed in the surrounding regions.

What is found within the M25 is a number of distribution centres, smaller processing sites and legacy manufacturing sites on the outskirts of the city region. As evident in the list below, many of these locations are smaller sites for large manufacturers that may serve one specific function e.g. Kerry foods site in Spurway manufacturing Ethnic Snacks.



No.	Company Name	Sector	Manufacturing Sites	Employees
1	Coca-Cola European Partners	Soft Drinks and Bottled Water	Edmonton, London	23,300
2	Kerry Foods	Ready Meals and Ethnic Snacks	Southall (Ready Meals) and Spurway (Snacks)	2,874
3	Bakkavor Group PLC	Ready Meals	Harrow (Pizza), Park Royal (Ready meals) and Wembley (Ready Meals)	20,105
4	United Biscuits UK Ltd	Confectionary	Harlesden	4,256
5	Ferrero UK Ltd	Confectionary	Greenford, London	231
6	Tate and Loyal Sugars	Ingredients	Royal Docks London	615
7	Nomad Foods Europe Ltd	Frozen food	Feltham, London	213
8	Kolak Snackfood	Confectionary	Wembley, London	912
9	New England Seafood	Fish and Shellfish	Chessington, London	627
10	Tilda Ltd	Rice	Romford London	270

South East

The South East region of the UK is the eighth largest in terms of turnover contributing 8% of the total turnover to UK Food and Drink manufacturing sector.

The region benefits from its proximity to London and its ease of access to the EU market from the port of Southampton with the region accounting for almost 25% of the UK's manufacturing exports.

The area has a varied profile of manufacturers across different subsectors with the region encompassing the London commuter belt and the more rural regions to the south. It is home to some of the largest food manufacturers in the UK such as Mars Wrigley Confectionery, Nestle UK and Hovis Limited as seen below.



No.	Company Name	Sector	Manufacturing Sites	Employees
1	Nestle UK Ltd	Dairy	Redhill	4,765
2	Mars Wrigley Confectionary UK Ltd	Confectionary	Slough	1,558
3	Hovis Limited	Bread and Pastry	Wycombe	2,878
4	Oscar Mayer Limited	Ready Meals (Private label)	Portsmouth	3,665
5	Noble Foods Limited	Confectionary	Strotford	714
6	Stock Spirits Limited	Beer and Spirits	Wycombe	1,080
7	Barry Callebaut Manufacturing	Chocolate Ingredients	Banbury	197
8	Limited Natures Way Foods Limited	Fruit and Veg	Chichester, Portsmouth	1,188
9	John Dewar and Sons Ltd	Beer and Spirits	Winchester, Southampton	412
10	Lantmannen Unibake UK limited	Bakery	Bagshot, Guildford	672

South West

The South West is the England's largest and most rural region, home to nearly a quarter of all agricultural holdings in the UK.

The region has more cattle, calves, sheep and lambs than any other. As you can expect this makes the region a key contributor to the UK's Dairy and Cheese and Meat and Poultry industries. These make Food and Drink the second biggest manufacturing industry in the South West just behind Automobiles and Aerospace



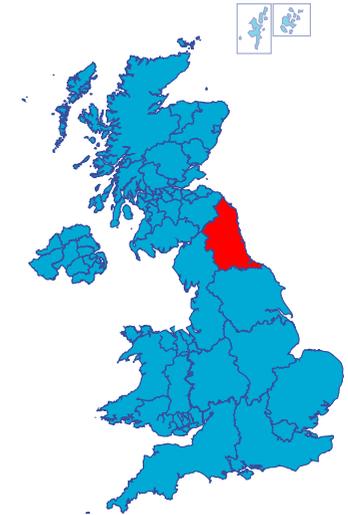
No.	Company Name	Sector	Manufacturing Sites	Employees
1	Kerry Ingredients	Ingredients	Bristol	1,711
2	Dunbia UK	Meat and Poultry Processing	Exeter	1,703
3	St Austell Brewery Company Limited	Beer and Spirits	Plymouth	1,519
4	Apetito	Meals for Care homes, hospitals, local authorities	Bath	1,151
5	Lyons Seafoods Limited	Fish and Shellfish	Bath	327
6	Thatchers Cider Company Limited	Beer and Spirits	Bristol	221
7	Wyke Farms Ltd	Dairy and Cheese	Bath	261
8	Andros UK Limited	Fruit and Veg	Bath	211
9	Dairy Partners Limited	Dairy and Cheese	Gloucester	154
10	Crediton Dairy Limited	Dairy and Cheese	Exeter	145

North East

While known for its strong automotive sector, there is a smaller food and drink manufacturing base in the North East.

The region is the smallest in terms of both employees and turnover with only 1.4% of the food and drink employees working here.

The food and drink presence in the North East is a mixed one with a number of large drinks manufacturers such as Camerons Brewery and Newcastle Lakes Distillery and varied food manufacturers.



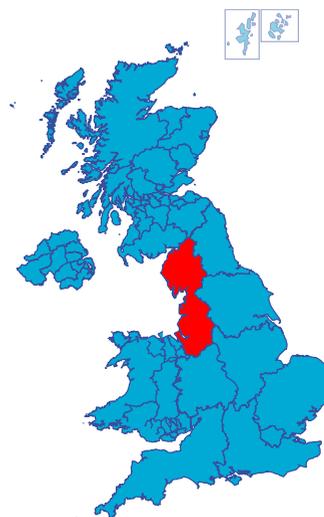
No.	Company Name	Sector	Manufacturing Sites	Employees
1	Froneri Ice Cream	Dairy and Cheese	Darlington	932
2	Marlow Foods Ltd	Manufactures Quorn Products	Middlesborough	829
3	The Kerfoot Group Ltd	Manufactures Cooking oils	East Darlington	122
4	Camerons Brewery Ltd	Beer and Spirits	Hartlepool	522
5	Ringtons Holdings Ltd	Tea Manufacturer	Newcastle upon Tyne	722
6	Kavli UK Ltd	Cheese Manufacturer	Gateshead	272
7	SK Chilled Foods	Ethnic Chilled Foods	Middlesborough	400
8	Wensleydale Dairy Products Ltd	Dairy and Cheese	East Darlington	256
9	It's All Good Ltd	Confectionary/Snacks	Gateshead	209
10	Northumbrian Fine Foods Ltd	Biscuit Manufacturer	Gateshead	236

North West

The North West is the UK's second largest manufacturing region in terms of gross value added.

The North West has a strong manufacturing heritage dating back to the industrial revolution where cities like Manchester and Liverpool were key manufacturing hubs in the UK.

From a food and drink perspective, the North West ranks third in terms of employment trailing London and Yorkshire and the Humber. In particular, the North West is home to the manufacturing sites of a number of household brand names such as Kelloggs, Warburtons, McVities and Unilever.



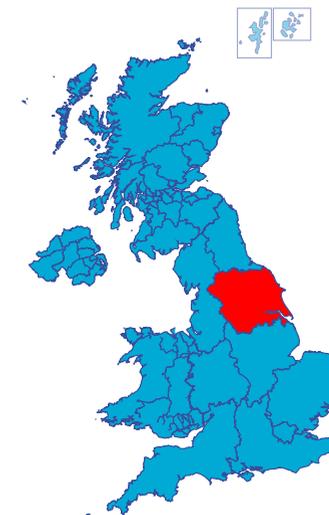
No.	Company Name	Sector	Manufacturing Sites	Employees
1	Unilever Plc	Consumer goods	Wirral, Liverpool	1,800
2	Warburtons	Bakery	Bolton, Runcorn, Burnley	4,504
3	Meadow Foods Limited	Dairy and Cheese	Chester	310
4	Dale Farm Ltd	Dairy and Cheese	Kendal, Lancaster	192
5	Halewood Wines and Spirits PLC	Beer and Spiritis	Liverpool	907
6	McVities	Confectionary	Carlisle and Manchester	800
7	Frank Bird Poultry Ltd	Meat and Poultry	Carlisle	220
8	Stateside Foods Ltd	Chilled foods	Bolton	1,066
9	CSM UK Ltd	Bakery	Trafford, GM	1,590
10	Park Cakes Ltd	Bakery	Oldham and Bolton	1,614

Yorkshire and the Humber

Yorkshire and the Humber is the largest food and drink region based on employees in the UK and it's the second largest based on turnover.

Yorkshire has a strong tradition of producing quality food and drink with several products such as Yorkshire Pudding, Yorkshire curd tart and ginger beer greatly associated with the region.

Within the region itself, food and drink is the largest manufacturing subsector, accounting for over a fifth of the region's manufacturing gross value added. Much of this value added is contributed to large manufacturers such as Arla Foods, 2 Sisters Food Group and Greencore who call the region home.

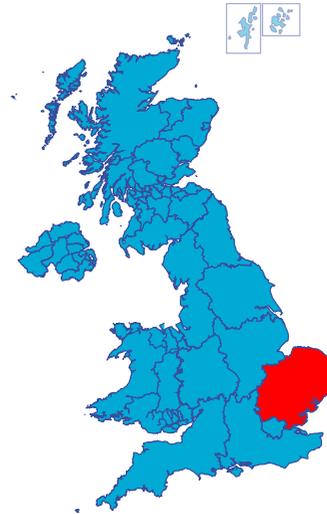


No.	Company Name	Sector	Manufacturing Sites	Employees
1	Arla Foods Ltd	Dairy and Cheese	Leeds	3,460
2	2 Sisters Food Group	Multi Sector, Frozen Chilled foods	Wakefield	5,983
3	Cranswick Country Foods PLC	Meat and Poultry	Hull	3,802
4	Greencore Food to Go Ltd	Multi Sector	Sheffield	7,882
5	WM Morrison	Meat and Poultry	Bradford	2,905
6	Young's Seafood Ltd	Fish and Shellfish	Grimsby	2,380
7	McCain Foods	Frozen	Scarborough	1,560
8	Forza Foods Ltd	Meat and Poultry	Wakefield	1,587
9	AAK UK Ltd	Oils and Fats	Hull	430
10	Country Style Foods Ltd	Bakery	Leeds	2,503

East of England

East of England is the sixth biggest region in the UK based on food and drink turnover and food and drink is the largest manufacturing sub sector in the region.

As evident in the below listing, much of East Anglia is rural and agricultural. Meat and poultry and dairy and cheese are strong sub sectors in the region. There are also several large malt producers in the region who feed the strong UK beer brewing sector from East Anglia.



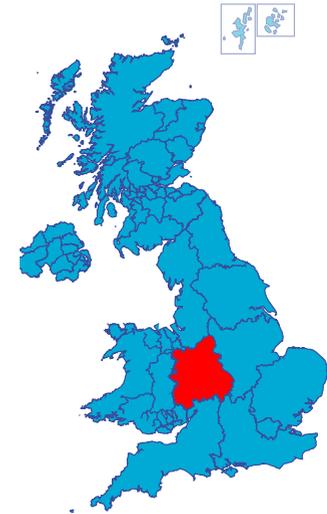
No.	Company Name	Sector	Manufacturing Sites	Employees
1	Greene King Plc	Beer and Spirits	Ipswich	38,894?
2	Hilton Food Group	Meat and Poultry	Huntingdon	969
3	Volac International Ltd	Dairy and Cheese	Royston	445
4	Bairds Malt Ltd	Malt Producer	Wiltham	227
5	Crisp Malting Group	Malt Producer	Ipswich and Norwich	379
6	Direct Table Foods Ltd	Meat and poultry	Ipswich	511
7	Shepherd Neame Ltd	Beer and Spirits	Medway	1,684
8	Hotel Chocolat	Confectionary	Royston, Stevenage	1,253
9	Paul's Malt Ltd	Malt Producer	Ipswich	121
10	Greenyard Frozen UK Ltd	Fruit & Veg	Peterborough	294

West Midlands

The West Midlands is the fourth largest food and drink Region in the UK based on turnover.

It is an attractive location within the UK for manufacturers to set up due to its strong transport links to the rest of the UK and with HS2, the new high speed rail line, on the horizon.

The region has a strong capability in food and drink machinery, with machinery manufacturing being the largest manufacturing subsector in the West Midlands. In terms of large manufacturers, Cadbury's site in Bournville and Muller's in Telford are key to the region and there is also a strong brewery cluster in Burton-on-Trent.



No.	Company Name	Sector	Manufacturing Sites	Employees
1	Muller UK and Ireland Group	Dairy and Cheese	ITelford	7,476
2	Marston's PLC	Beer and Spirits	Birmingham	14,038?
3	Ornua Foods UK Ltd	Ingredients	Leek, Stoke-on-Trent	599
4	KTC (Edibles) Ltd	Ingredients	Wednesbury, Walsall	327
5	Avara Foods	Meat and Poultry	Hereford	1,800
6	Mondelez UK Confectionary Production Ltd	Confectionary	Birmingham	553
7	Aston Manor	Beer and Spirits	Birmingham	302
8	Agrial Fresh Produce Ltd	Fruit and Veg	Lichfield, Walsall	1,236
9	Molson Coors Brewing Company	Beer and Spirits	Burton-on-Trent	2,035
10	Kanes Foods Ltd	Fruit and Veg	Evesham, Worcester	1,473

East Midlands

The East Midlands is the seventh largest food and drink manufacturing region in the UK with 10% of the food and drink workforce employed in the region.

Almost a quarter of its overall manufacturing gross value added can be attributed to the food and drink sector making it the strongest sub sector in the region.

The East Midlands benefits from similar location and transport links as the West Midlands with a diverse food and drink manufacturing base built around Northampton, Leicester and Nottingham.



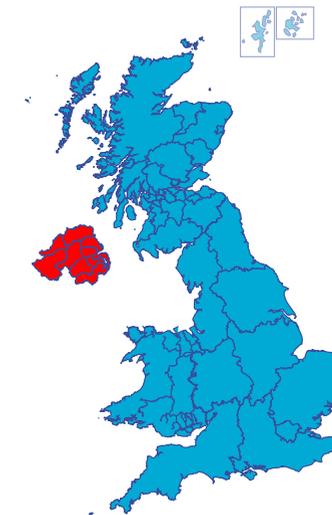
No.	Company Name	Sector	Manufacturing Sites	Employees
1	Samworth Brothers Limited	Ready meals, Sports nutrition, Meat and Poultry	Melton Mowbray, Leicester	8,798
2	Faccenda Foods Ltd	Meat and Poultry	Brackley, Northampton	3,588
3	Carlsberg UK Limited	Beer and Spirits	Northampton	385
4	Addo Food Group Ltd	Bakery, Meat and Poultry	Nottingham	2,722
5	Weetabix Ltd	Other	Kettering, Northampton	1,002
6	Alpro UK Ltd	Dairy and Cheese	Kettering, Northampton	247
7	Tayto Group Ltd	Confectionary	Corby, Northampton	1,521
8	Roquette UK Ltd	Other	Corby, Northampton	132
9	Orchard House Foods Ltd	Fruit and Veg	Corby, Northampton	1,292
10	Branston Ltd	Fruit and Veg	Lincoln	715

Northern Ireland

Northern Ireland is the ninth largest region by turnover contributing 5% of the UK's total food and drink turnover.

Food and drink is the largest manufacturing sub sector in Northern Ireland with over a quarter of total manufacturing output.

As evident in the list below, Northern Ireland, similar to the Republic, is particularly strong in the "Meat and Poultry" and "Dairy and Cheese" sub sectors due to its strong agricultural base. Brands like Dunbia and Dale Farm founded in the North of Ireland also have strong bases now in the UK and offer a potential connection for suppliers to Britain itself.



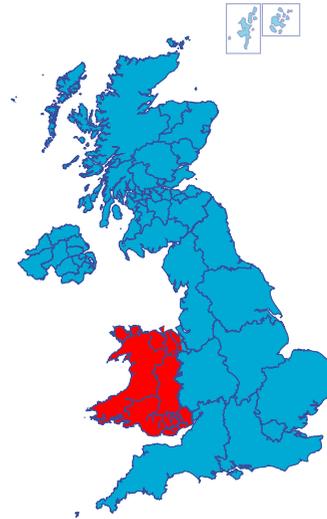
No.	Company Name	Sector	Manufacturing Sites	Employees
1	Moy Park Ltd	Meat and Poultry		10,061
2	Hilton foods Ltd	Meat and Poultry		1,092
3	Dale Farm Ltd	Dairy and Cheese		821
4	Foyle Food Group Limited	Meat and Poultry	Omagh	1,271
5	Lacpatrick Dairies	Dairy and Cheese		249
6	Dunbia Ltd	Meat and Poultry	Tyrone	701
7	Linden Foods Ltd	Meat and Poultry	Dungannon, Tyrone	1,070
8	Cranswick Country Foods	Meat and Poultry	Ballymena, Antrim	308
9	Strathroy Dairy Limited	Dairy and Cheese	Omagh, Tyrone	151
10	Finnebrogue	Meat and Poultry	Downpatrick	444

Wales

Wales is the eleventh largest contributor to food and drink providing 2% of overall turnover to the market.

Food and drink is the second largest subsector of Welsh manufacturing with 14.6% of total manufacturing GVA trailing automotive and aerospace.

The food and drink capability is mixed in Wales as evident below. Much of Wales is rural with its mountainous and mild climate suiting livestock farming. This is represented in the sample of manufacturers below as meat and poultry and dairy and cheese are key in the region.



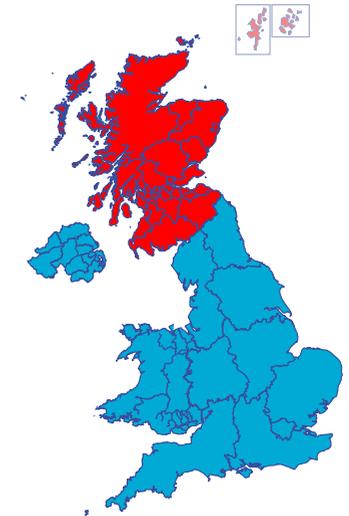
No.	Company Name	Sector	Manufacturing Sites	Employees
1	Finsbury Food Group Plc	Bakery	Cardiff	3,062
2	Dunbia Wales	Meat and Poultry	Llanybyder, Swansea	477
3	ABP	Meat and Poultry	Ellesmere, Shrewsbury	950
4	Euro Quality Lambs Ltd	Meat and Poultry	Craven Arms, Shrewsbury	103
5	OP Chocolate Limited	Confectionary	Methyr Tydfil, Cardiff	534
6	Fei Foods Limited	Other	Pontyclun and Swansea	361
7	Radnor Hills Mineral Water Company Ltd	Soft Drinks and Bottled Water	Knighton, Llandrindod Wells	194
8	CDT Sidoli Ltd	Confectionary	Welshpool, Shrewsbury	397
9	Halo Foods Limited	Confectionary	Newport	246
10	Kepak	Meat and Poultry	Merthyr Tydfil, Cardiff	800

Scotland

Scotland is the third largest region by food and drink turnover in the UK and a key contributor to the sector.

Food and drink is by far the largest sub-sector of manufacturing in the region with over 28% of manufacturing gross value added.

This is due to its particularly strong beer and spirits sector with global brands like Diageo, Pernod Ricard and Brewdog having significant presences in the region. This is further bolstered by strong seafood and meat and poultry sectors.



No.	Company Name	Sector	Manufacturing Sites	Employees
1	Diageo Scotland Ltd	Beer and Spirits	Edinburgh+ Leven	3,126
2	William Grant and Sons Group Ltd	Beer and Spirits	Keith, Aberdeen	2,626
3	Chivas Brothers Ltd	Beer and Spirits	Dumbarton, Glasgow	1,746
4	2 Sisters Poultry Ltd	Meat and Poultry	Blairstown, Perth	3,547
5	Scotbeef Ltd	Meat and Poultry	Stirling, Falkirk	891
6	The MacCallan Distillers Ltd	Beer and Spirits	Aberlour, Aberdeen	121
7	Mowi Consumer Products UK Ltd	Fish and Shellfish	Edinburgh	397
8	Bakkavor Salads	Fruit and Veg	Bo'ness, Edinburgh	1,500
9	Walkers Shortbread Ltd	Confectionary	Elgin	1,439
10	Brewdog PLC	Beer and Spirits	Cupar, Kirkcaldy	1,254

Sources

Information was obtained from numerous secondary data sources including statistics provided by the Food and Drink Federation, Make UK, UK Office for National Statistics and a large number of industry associations and news websites.

Some examples of specific sources are outlined below:

Office for National Statistics: data from Inter Departmental Business Register (IDBR)

National Statistics: Food Statistics in your pocket 2017: Food Chain, Updated 9 October 2018

BDO, Food and Drink Report, 2018 edition

Food & Drink Federation: The food and drink industry: Economic contribution and growth opportunities.

Make UK, Sector Bulletin: Food and Drink 2020 Update

Food & Drink Federation: our industry at a glance (infographic)

Euromonitor: various reports

IBIS World: Various reports

Marketline: Various reports

Frost and Sullivan – Automation in Food and Beverage

Plimsoll: various reports

DEFRA: Survey of the UK Food and Drink Manufacturing Industry, January 2019

University of Cambridge: Value of food & drink manufacturing to the UK

UK 'bounce back' plan for food and drink sector: 'More trade is absolutely critical': <https://www.foodnavigator.com/Article/2020/06/22/UK-bounce-back-plan-for-food-and-drink-sector-More-trade-is-absolutely-critical>



Anchor flies the British flag: <https://www.arlafoods.co.uk/overview/news--press/2017/pressrelease/anchor-flies-the-british-flag-2044916/>

Consumers go local as food purchasing changes amid pandemic: <https://www.foodmanufacture.co.uk/Article/2020/06/29/Coronavirus-Consumers-buy-local>

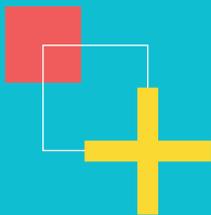
<https://www.politico.com/news/2020/05/17/coronavirus-reheats-europes-food-nationalism-262251>

Piling on the pounds: the route to reformulation: <https://www.foodmanufacture.co.uk/Article/2019/03/22/Food-firms-struggle-with-reformulation-challenges>

UK food and drink sector grows despite uncertainties, states report: <https://www.newfoodmagazine.com/news/101712/uk-food-and-drink-sector-grows-despite-uncertainties-states-report/>

Examples of Industry Associations:

- Association of Bakery Ingredients Manufacturers (ABIM): www.abim.org.uk
- British Retail Consortium (BRC): www.brc.org.uk
- British Soft Drinks Association (BSDA): www.britishsoftdrinks.com
- Chilled Food Association: www.chilledfood.org
- Federation of Bakers: www.fob.uk.com
- Society of Independent Brewers: www.siba.co.uk
- Seafish: www.seafish.org
- British Meat Processors Association: www.britishmeatindustry.org
- Fresh Produce Consortium: www.freshproduce.org.uk



Enterprise Ireland is the Government agency responsible for the development and growth of Irish enterprises in world markets. Enterprise Ireland is an international organisation with a network of 40 international offices, facilitating access to more than 60 countries worldwide.

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