Food and Drink Federation
Making a real difference

UK Food & Drink Export Performance
Full Year 2009

Research carried out by
Leatherhead Food Research
for
the Food and Drink Federation (FDF)

April 2010

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UK Food & Drink Export Performance
Full Year 2009

Top Line Performance

- UK food and non-alcoholic drink exports grew 4.4% in 2009 to £9.65bn, a fifth consecutive year of record food and non-alcoholic drink export performance.
- Compared to the 19.8% growth rate in 2008, the 2009 performance could be viewed as lacklustre, but with trading conditions proving increasingly difficult as the year progressed (food and non-alcoholic drink export growth slowed markedly after the first quarter) and the economic climate continuing to prove challenging as global demand slumped, the end result was highly credible. Growth of 4.4% compares extremely favourably to the 11.8% drop in exports for all UK commodities during 2009, meaning food and drink outperformed the export activity of UK manufacturing as a whole.
- The continued weakness of the Pound has certainly helped in the last year (£1 was worth €1.12 in 2009 versus €1.28 in 2008 and US$1.55 in 2009 versus US$1.88 in 2008), however, most of the benefit was seen in the first half of the year as the Pound strengthened later on making UK exports less competitive.
- Including alcoholic drinks, total food and drink exports were worth £14.31bn in 2009, 5.0% up on 2008. The key whisky sector, worth £3.21bn alone, achieved only 2.5% growth for the year and much of this was down to a strong final quarter performance (whisky exports were down on 2008 up until that point).
- The best performing sector in 2009 was non-alcoholic drinks (soft drinks and waters), albeit the smallest sector, with growth of 20.6% to £318.6m driven by strong gains in the major European markets such as Ireland, France, Spain and Germany.
- The only other sector in double digit growth was fish and seafood, up 15.0% to £1,160.4m including strong growth for all key product sectors except crustaceans which continue to struggle in the key Spanish market.
- British beef (+20.8% to £257.5m) and lamb (+18.6% to £311.9m) continue to see good progress in European markets and the meat category as a whole posted a solid 5.0% gain for the year, taking the value of meat exports to £1,289.6m.
- The dairy sector was the laggard of the year, down 6.9% to £776.9m. The strong growth seen in cheese exports in recent years has come to a shuddering halt, with just a 0.5% rise in 2009 and exports to key cheese markets such as the Netherlands and the USA struggling to get near previous year levels.
- Other major added value product areas in strong growth include breakfast cereals at +17.2%, sweet biscuits at +8.3%, sauces and condiments at +9.2% and sugar confectionery at +10.9%
- The EU share of UK food and non-alcoholic drinks exports was 79.2% in 2009 but non-EU countries led the way in terms of growth (7.3% growth for non-EU vs. 3.6% growth for EU). Key non-EU countries leading the charge include the USA (+17.4%, with growth driven by fish and seafood), Canada (+10.5%, driven by tea and sauces and condiments), the UAE (+18.3%, with dairy, breakfast cereals and bakery products strong performers), Australia (+17.2%, with chocolate and breakfast cereals well up) and Saudi Arabia (+14.0%, with sauces and condiments and breakfast cereals strong).

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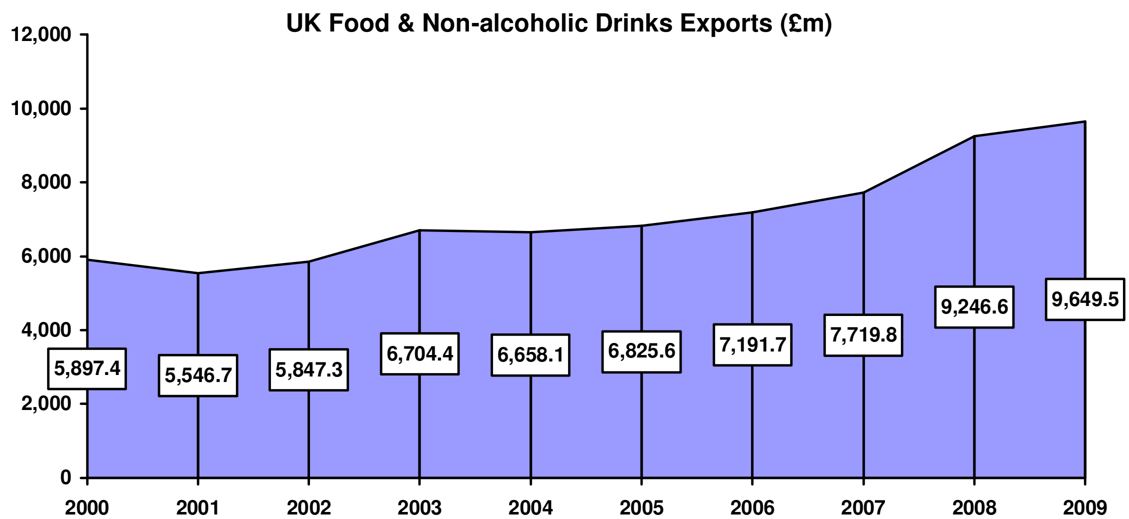
- The main EU economies still dominate the top 10 list of UK food and non-alcoholic drink export markets (only the US from outside the EU makes it into the top 10) and have largely had a solid if unspectacular 2009 in terms of growth. For example, growth for the top 3 markets of Ireland, France and the Netherlands was 5.7%, 6.0% and 9.0% respectively.
- Export progress to the EU markets within the Central European region however has faltered somewhat with exports to Poland, for example, down 3.0%.
- UK food and non-alcoholic drink exports to the 16 members of the Eurozone grew by 5.0% in 2009, above the 3.6% growth rate for the EU as a whole and reinforcing the UK's reliance on the major Eurozone trading partners within Europe.



Source: Leatherhead Food Research

UK Exports of Food & Non-alcoholic Drinks by EU / Non-EU, 2008-2009 (£ million)

	2008	2009	% change 08-09
Total Food & Non-alcoholic drinks exports	9,246.6	9,649.5	**4.4**
Total EU	7,377.5	7,644.3	**3.6**
Total Non-EU	1,869.1	2,005.2	**7.3**
EU % share	79.8	79.2	
Non-EU % share	20.2	20.8	

Source: Leatherhead Food Research

Notes for comparison:

- Including alcoholic drinks, total food and drink exports were £14.31bn, 5.0% up on 2008.

- All UK commodities exports at £226.86bn in 2009 were down 11.8% on 2008 (i.e. the food/non-alcoholic drinks sector continues to significantly outperform the total of all export sectors, and food/non-alcoholic drinks share of total UK exports for 2009 is 4.3%).

- Imports of food and non-alcoholic drinks were £29.92bn, up just 2.7% on the same period in 2008 as food and non-alcoholic drinks exports continue to grow ahead of imports, reversing the trend over the last decade.

- However, the food and non-alcoholic drinks trade gap has grown 1.9% from a deficit of £19.89bn in 2008, to a deficit of £20.27bn in 2009.

Top Sectors

UK Exports of Food & Non-alcoholic Drinks by Sector, 2008-2009 (£ million)

Sector	2008	2009	% change 08-09
Other Prepared Foods*	2,177.4	2,317.7	6.4
Cereals & Bakery	1,888.3	1,914.5	1.4
Meat & Animal Products	1,228.5	1,289.6	5.0
Fish & Seafood	1,009.6	1,160.4	15.0
Dairy	834.0	776.9	-6.9
Fruit & Vegetables	730.7	717.0	-1.9
Tea, Coffee, Cocoa, Spices	676.7	714.9	5.7
Sugar & Sugar Confectionery	437.3	440.0	0.6
Non-alcoholic Drinks	264.2	318.6	20.6
Total	**9,246.6**	**9,649.5**	4.4

Source: Leatherhead Food Research

**inc. fats & oils, preserved fruit/veg, fruit juice, soups, sauces & condiments, ice cream, vinegar, animal feeds and other miscellaneous products*

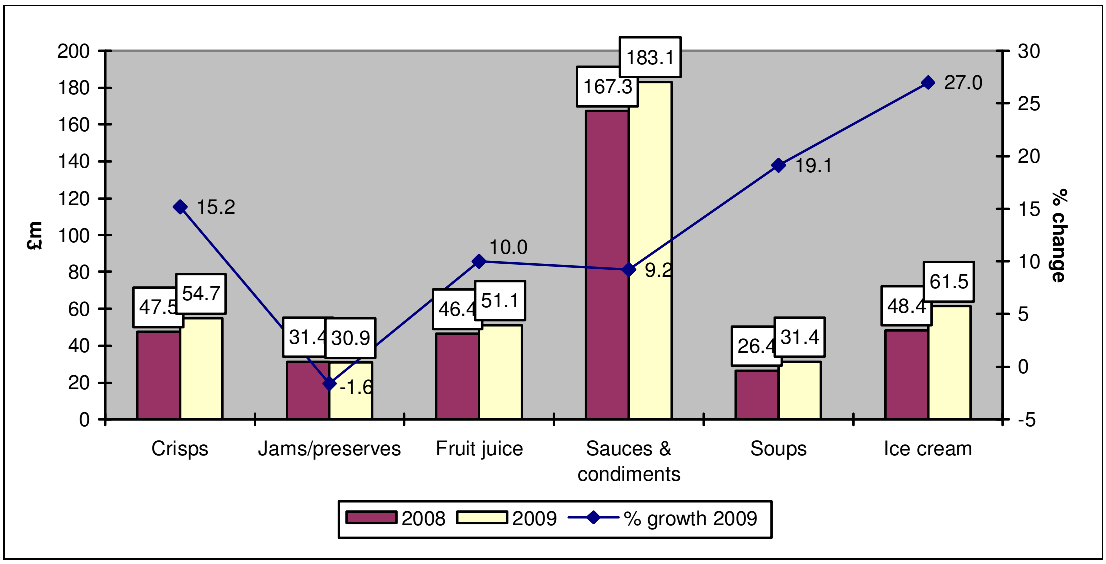
UK Exports of Food & Non-alcoholic Drinks: 20 key top products, 2009

	2009 (£m)	% change 08-09
Breakfast cereals	413.4	17.2
Chocolate	365.9	1.1
Lamb	311.9	18.6
Fresh fish	309.0	28.2
Soft drinks	291.5	23.4
Cheese	282.6	0.5
Beef	257.5	20.8
Crustaceans	238.9	-1.4
Poultry	229.3	5.5
Sweet biscuits	220.9	8.3
Frozen fish	208.1	23.9
Milk & cream (not cnrt/swt)	194.7	-2.4
Prepared meat	191.1	-4.4
Sauces & condiments	183.1	9.2
Tea	179.8	2.4
Cakes	168.3	6.2
Sugar confectionery	140.4	10.9
Fish fillets	120.6	16.4
Pork	112.8	-14.7
Molluscs	112.0	19.7

Source: Leatherhead Food Research

- **Prepared foods** exports (including £430.1m worth of fats & oils which were 3.7% up, preserved fruit/veg, fruit juice, soups, sauces & condiments, ice cream, vinegar, animal feeds and other misc. products) grew 6.4% in 2009 to £2,317.7m, including:
    - **Sauces and condiments** +9.2% to £183.1m (no.1 market Ireland +22.2%, no.2 the Netherlands +42.3%).
    - **Ice cream** +27.0% to £61.5m (no.1 market Ireland +24.4%, no.2 France +50.4%, no.3 the Netherlands +120.5%, no.4 Italy +50.5%).
    - **Crisps** +15.2% to £54.7m (no.1 market Ireland +24.8%, no.7 Denmark +180.7%).
    - **Fruit juice** +10.0% to £51.1m (no.1 market Ireland +10.4%, no.2 France +70.7%).
    - **Soups** +19.1% to £31.4m (no.1 market Ireland +37.9%, no.3 Belgium +103.4%).

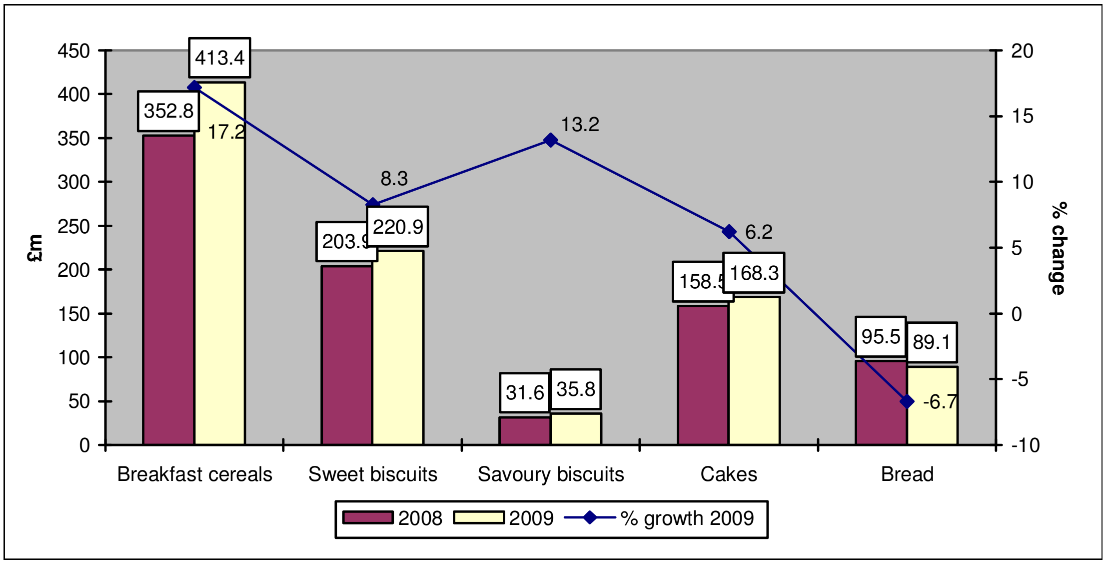
UK Exports of Selected Prepared Foods, 2008-2009 (£ million)



Source: Leatherhead Food Research

- **Cereal & bakery products** exports were £1,914.5m in 2009, a rise of just 1.4% on 2008, largely restricted by a 17.4% drop in the commodity cereals market to £453.1m (many of the major European markets showing significant declines). Growth areas were:
    - **Breakfast cereals** +17.2% to £413.4m (no.1 market Ireland +10.2%, no.2 France +17.4%, no.3 Italy +19.4%, no.5 Belgium +65.5%).
    - **Sweet biscuits** +8.3% to £220.9m (no.1 market Ireland +11.7%, no.2 France +38.8%).
    - **Cakes** +6.2% to £168.3m (Ireland accounting for a 59% share seeing 9.8% growth).
    - **Savoury biscuits** +13.2% to £35.8m (no.1 market the US +19.4%, no.2 Ireland +11.4%, no.3 Canada +35.1%, no.4 Belgium +22.8%).

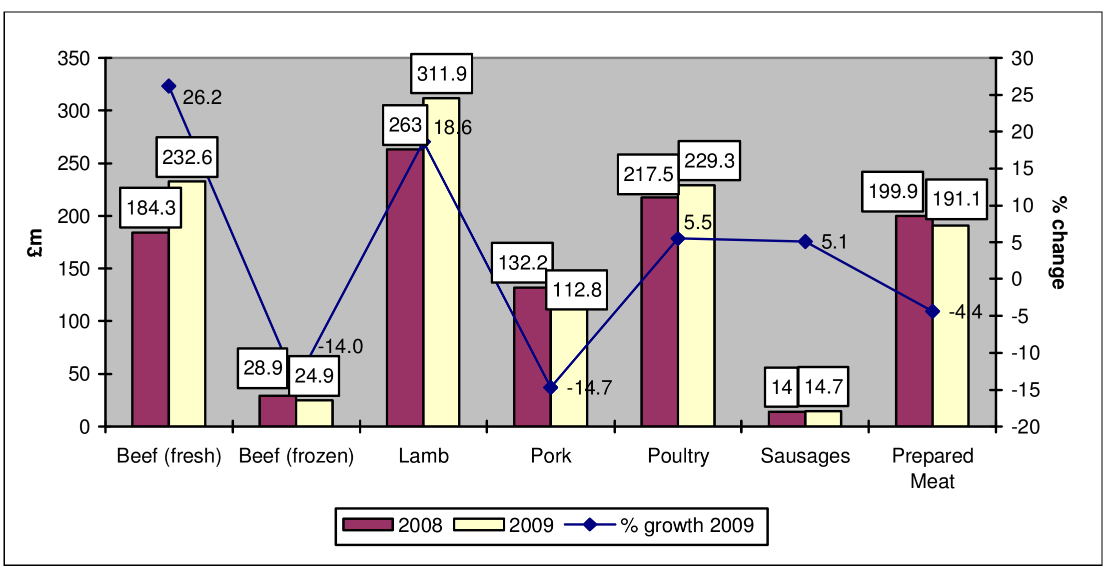
UK Exports of Selected Bakery Products, 2008-2009 (£ million)



Source: Leatherhead Food Research

- **Meat** (and related animal products) exports were up 5.0% to £1,289.6m (despite being dragged down by a 14.7% decline in pork exports). Key segments in growth were:
    - **Lamb** +18.6% to £311.9m (no.1 market France +14.5%, no.2 Belgium +43.5%, no.3 Italy 38.6%, no.4 Germany +26.6%).
    - **Beef** +20.8% to £257.5m overall masking a 14.0% drop in frozen beef exports (including a rise of 29.2% in fresh beef to no.1 market the Netherlands, +68.1% in fresh beef to no.3 Italy and +44.6% in fresh beef to no.4 France, as well as a huge 156.8% jump to the now no.6 market Switzerland).
    - **Poultry** +5.5% to £229.3m (no.1 market Ireland +10.9%, no.3 Germany +24.9% and large rises in exports to Hong Kong (now no.6 with +181.1%) and Ghana).
    - **Sausages** +5.1% to £14.7m (no.2 market Spain +20.8%, Germany jumping 167.9% to no.3 spot and no.4 Afghanistan +61.5%).

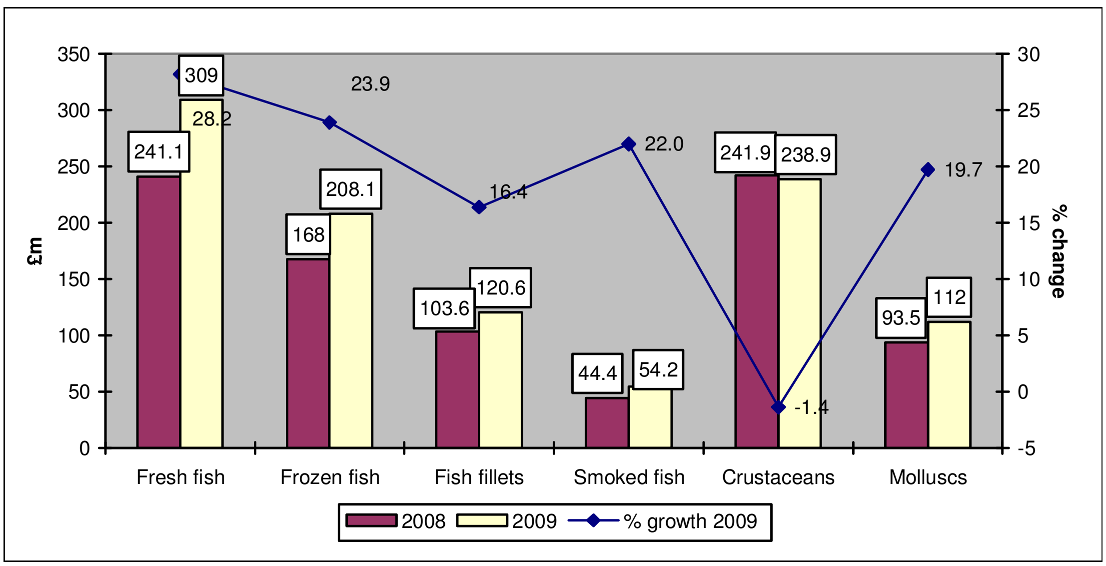
UK Exports of Selected Meat Products, 2008-2009 (£ million)



Source: Leatherhead Food Research

- **Fish & seafood** exports grew 15.0% to £1,160.4m, including:
  - **Fresh fish** +28.2% to £309.0m including a 42.3% rise in the key **fresh salmon** sector which is now 63% of fresh fish exports (no.1 fresh salmon market USA +75.1%, no.2 France +20.5%, no.3 Ireland +33.0, with Poland an emerging market at no.5 with +138.9%).
  - **Frozen fish (excluding fillets)** +23.9% to £208.1m including a 45.3% rise in the key **frozen mackerel** sector (no.1 market Russia +29.1%, no.2 the Netherlands +70.6%, no.3 China +204.0%). Despite a 440.5% rise in exports of **frozen cod** to no.1 market Portugal, overall frozen cod exports were down 2.4%.
  - **Fish fillets** +16.4% to £120.6m including a 34.4% rise to no.1 market France and a huge jump from £0.9m to £11.5m (£10.6m of which is salmon fillets) to the USA, now the no.4 market.
  - **Molluscs** +19.7% to £112.0m (no.1 market France +75.7% and now accounting for a 51% share of all UK molluscs exports alone).
  - **Smoked fish** +22.0% to £54.2m, with **smoked salmon** (accounting for a 77% share of smoked fish exports) up 27.1% (no.1 smoked salmon market Italy +37.3%, no.2 France +10.2% and no.3 Germany +78.3%).
  - The big loser continues to be the sizeable **crustaceans** sector (down 1.4% to £238.6m with the key Spanish market dropping 6.2%).

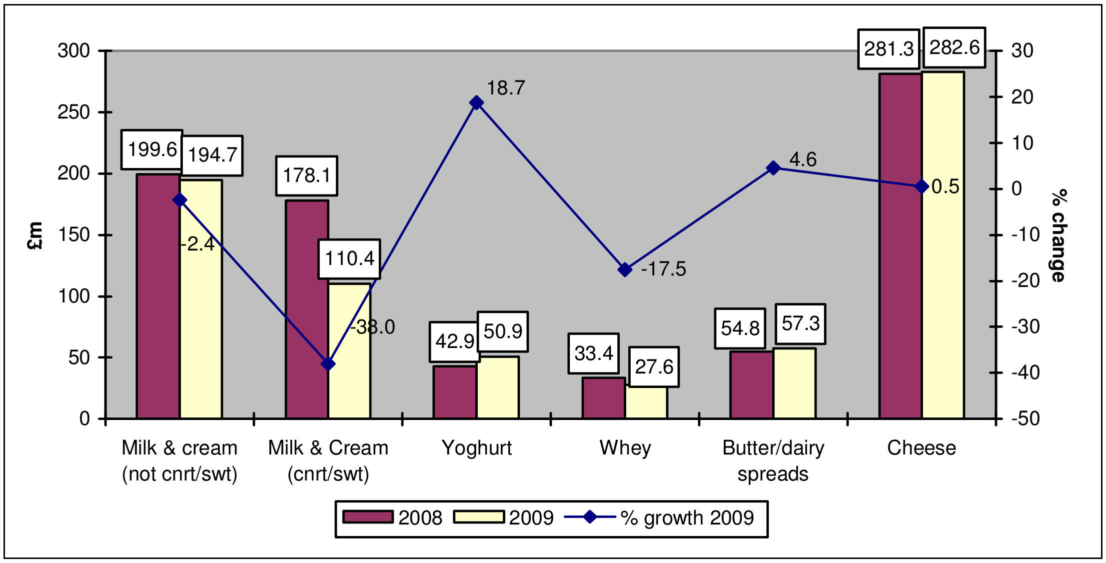
UK Exports of Selected Fish & Seafood Products, 2008-2009 (£ million)



Source: Leatherhead Food Research

- **Dairy** has seen the sharpest fall in exports of any category in 2009, down 6.9% to £776.9m, with cheese virtually static at just +0.5% to £282.6m (a poor performance compared to the stellar growth of recent years), milk and cream (not concentrated/sweetened) down 2.4% to £194.7m, milk and cream (concentrated/sweetened) down 33.0% to £110.4m, and whey down 17.5% to £27.6m.
  - Within cheese, **cheddar** was up 4.2% to £100.7m (no.1 market Ireland +7.3%, no.4 France +21.4%, but no.2 Netherlands -18.8% and no.3 USA -5.8%).
  - **Territorial cheeses** were up 3.8% but the no.1 market, the USA (which has seen its share of this category drop from 70% in 2008 to 55% in 2009), was down 19.2%. High growth from small bases was seen in the Netherlands, Ireland, Germany and Australia.
  - **Blue cheese** was down 17.1% (no.1 market USA -24.8%).
  - **Processed cheese** exports were also well down, -7.4%.

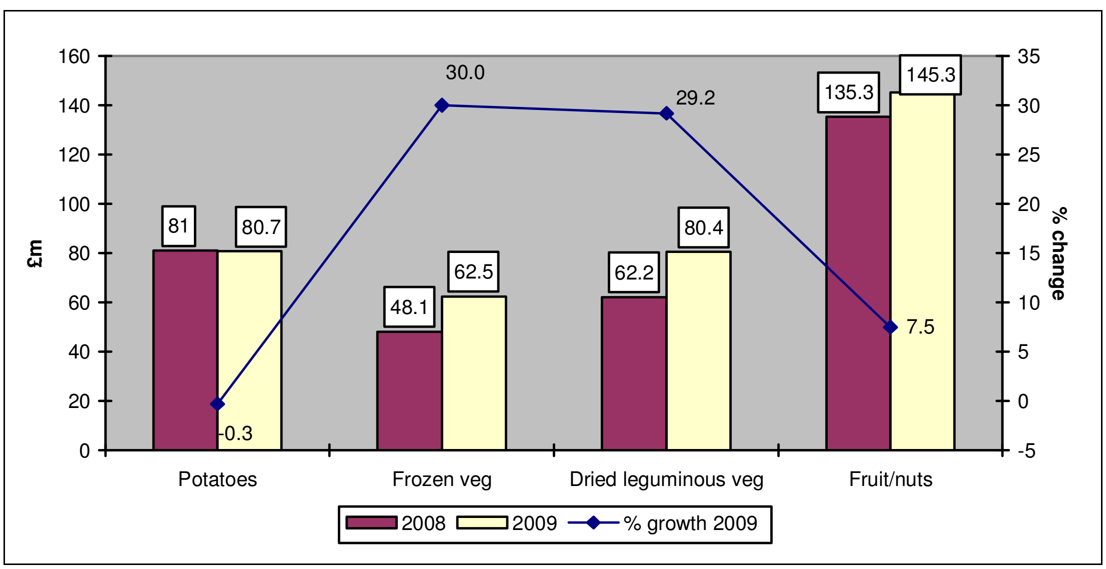
UK Exports of Selected Dairy Products, 2008-2009 (£ million)



Source: Leatherhead Food Research

- **Fruit & vegetable product** exports were down 1.9% to £717.0m with potato exports down 0.3% (including a drop of 5.2% to no.1 market Ireland). Segments of growth included:
    - **Fruit/nuts** +7.5% to £145.3m (no.2 market the Netherlands +64.4%).
    - **Dried leguminous vegetables** +29.2% to £80.4m (no.1 market Egypt +36.2%).
    - **Frozen vegetables** +30.0% to £62.5m (no.1 Ireland +29.6%, no.2 Belgium +83.6%).

UK Exports of Selected Fruit & Vegetables, 2008-2009 (£ million)

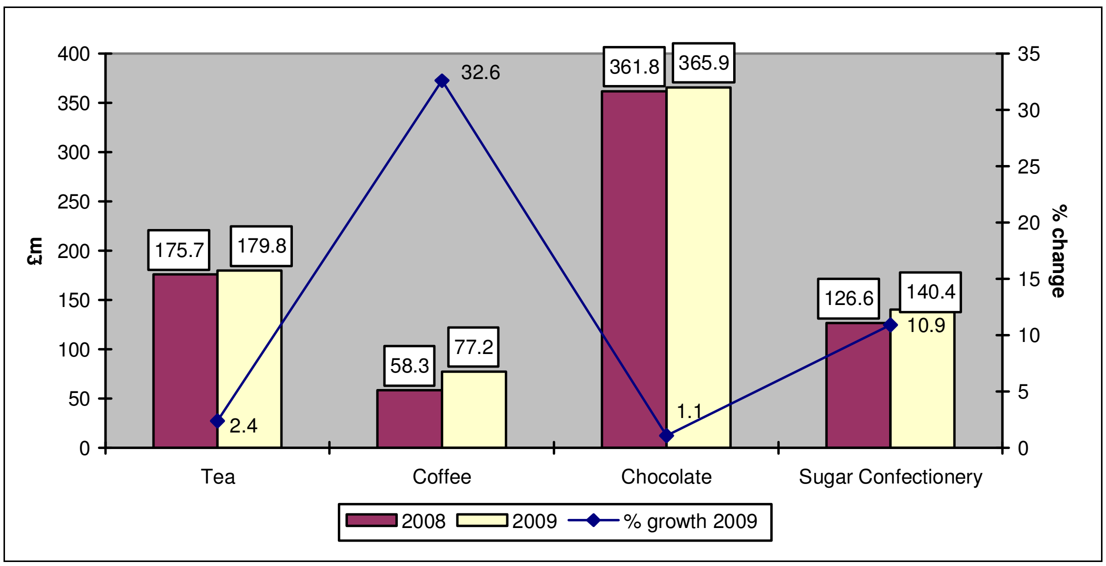


Source: Leatherhead Food Research

- **Tea, coffee, cocoa & spices** exports were £714.9m, up 5.7% including:
  - **Chocolate** +1.1% to £365.9m (no.1 market Ireland +10.9% and fast growth coming from no.8 market Australia at +72.0%).
  - **Tea** +2.4% to £179.8m (no.1 market Canada +26.3%, no.2 Ireland +15.2% and no.8 market Belgium showing strong growth at +34.2%).
  - **Coffee** +32.6% to £77.2m (no.1 market Ireland +36.9%, no.2 France +116.5%, no.3 Germany +114.3%).

- **Sugar & sugar confectionery** exports were up 0.6% to £440.0m.
  - **Sugar confectionery** +10.9% to £140.4m (no.1 Ireland +18.3%, no.2 Germany +10.2% and no.5 the USA +50.0%).

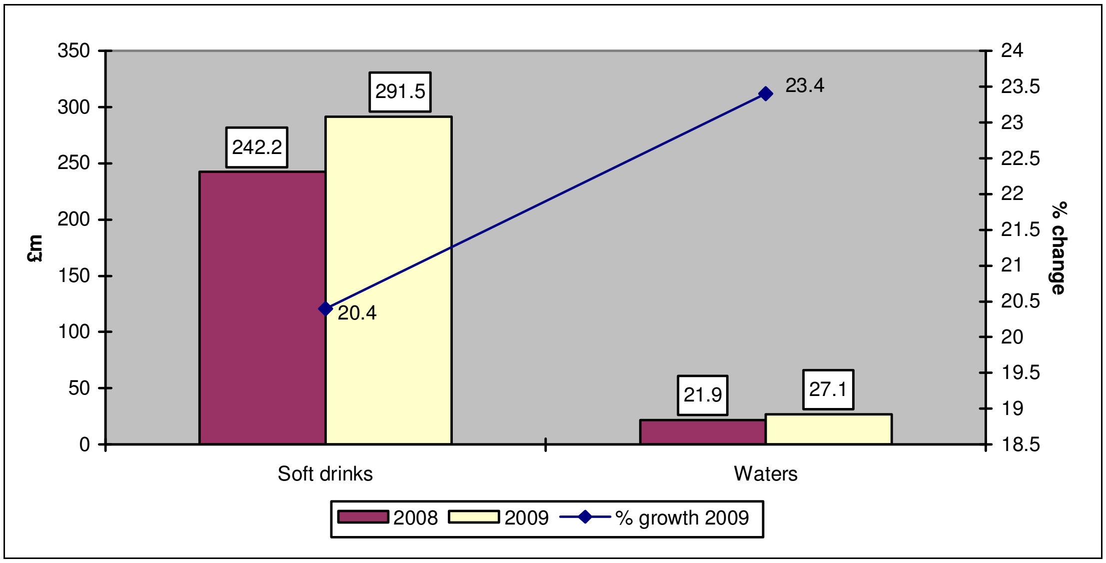
UK Exports of Coffee/Tea, Chocolate/Sugar Confectionery, 2008-2009 (£ million)



Source: Leatherhead Food Research

- **Non-alcoholic drinks** (not including fruit juices which are part of the prepared foods category) saw the highest growth of any category (albeit from the smallest base), rising 20.6% to £318.6m, including:
  - **Soft drinks** +20.4% to £291.5m (no.1 market Ireland +9.7%, no.2 France +161.5%, no.4 Spain +94.9% and no.5 Germany +54.3%).
  - **Waters** +23.4% to £27.1m (no.1 market Ireland +59.2%).

UK Exports of Non-alcoholic Drinks, 2008-2009 (£ million)



Source: Leatherhead Food Research

Top Markets

- In 2009, the top 9 countries for UK exporters continued to be the same, although Portugal has displaced Sweden in 10th place. The top 10 countries account for 76% of all UK food and non-alcoholic drink exports.
- The two top 10 markets to suffer a fall in exports in 2009 were Germany (down 4.2%, largely due to a 26.6% decline in pork exports), and Denmark (down 27.5%, with a 76.1% fall off in frozen fish, as well as a 22.2% drop in pork).
- Double digit growth in exports was recorded to:
  - The **USA** (+17.4%, including 82.7% growth in the leading category **fish and seafood,** which now accounts for just under a third of all food and non-alcoholic exports to the US).
  - **Portugal** (+29.6%, with a 440.5% jump in **frozen cod** and a 166.5% rise in **lamb,** along with a solid 11.3% growth in the leading category of **commodity cereals**).
  - **Canada** (+10.5%, with a 26.3% rise in **tea** and a 17.9% rise in **sauces and condiments**).
  - The **UAE** (+18.3%, with a 131.3% rise in **dairy**, a 65.7% rise in **breakfast cereals**, and a 62.3% rise in **cakes/pastries/bread**).
  - **Australia** (+17.2%, including 72.0% growth in **chocolate** and 41.5% growth in **breakfast cereals**).
  - **Saudi Arabia** (+14.0%, including 54.4% growth in **sauces and condiments**, and 30.0% growth in **breakfast cereals**).
- Fast growth markets just outside the top 20 are **Egypt** at no.21 (+42.9% with shelled beans a fast growing sector), **Hong Kong** at no.22 (+21.0%, including +43.3% in meat and +59.8% in fish and seafood), **Switzerland** at no.23 (+15.4%, including +98.7% in meat) and **China**, no.25 (+30.7%, including +190.8 in fats and oils, and +34.4% in sauces and condiments).
- Poland, Russia, Japan and Greece all recorded negative performances in 2009. Poland down 3.0% (including a 16.4% drop in meat), Russia down 3.2% (including a 17.5% drop in sauces and condiments), Japan down 7.5% (including a 6.8% decline in tea, and 37.5% drop in coffee) and Greece down 8.5% (including a 75.6% drop in sugars).

UK Exports of Food & Non-alcoholic Drinks: Top 20 Countries, 2008-2009 (£ million)

Rank	Country	2008	2009	% change 08-09
1 (-)	Ireland	2,449.2	2,589.0	5.7
2 (-)	France	1,142.3	1,211.4	6.0
3 (-)	Netherlands	777.5	847.8	9.0
4 (-)	Germany	688.6	659.9	-4.2
5 (-)	Spain	574.6	579.7	0.9
6 (-)	Italy	427.0	451.0	5.6
7 (-)	Belgium	358.4	373.5	4.2
8 (-)	United States	258.1	303.0	17.4
9 (-)	Denmark	220.9	160.2	-27.5
10 (+1)	Portugal	118.6	153.6	29.6
11 (-1)	Sweden	129.7	129.8	0.0
12 (-)	Norway	116.8	127.6	9.2
13 (+1)	Canada	112.5	124.3	10.5
14 (-1)	Poland	116.4	113.0	-3.0
15 (-)	Russia	100.0	96.8	-3.2
16 (+2)	United Arab Emirates	75.4	89.2	18.3
17 (+2)	Australia	68.8	80.7	17.2
18 (-1)	Japan	86.1	79.7	-7.5
19 (-3)	Greece	86.1	78.8	-8.5
20 (-)	Saudi Arabia	66.6	75.9	14.0

Source: Leatherhead Food Research

Changes in ranking position are versus 2008

Regional Analysis

EU

- The performance of UK food and non-alcoholic exports across the EU in 2009 varied from a high of +29.6% to Portugal (a market on the bounce due to a rise in commodity cereals, as well as frozen cod and lamb) to a low of -27.5% to Denmark (with declines in large categories such as pork and frozen fish).
- The larger EU markets have seen steady if not spectacular growth:
    - Ireland (+5.7%, including 10.1% growth in breakfast cereals and 22.2% in sauces and condiments)
    - France (+6.0%, including 13% growth in meat, +14.5% in lamb and +44.6% in fresh beef, as well as 24.5% growth in fish and seafood)
    - The Netherlands (+9.0%, including 85.8% growth in fats and oils and 29.2% in fresh beef)
- The progress of Central European countries seen in recent years has been largely halted. Poland's progress reversed with a 3.0% decline in 2009, Hungary is well down at -30.7% as are many of the smaller states. The major exceptions are the Czech Republic (+23.5%, driven by a 294.2% jump in meat exports), and Bulgaria (+27.4%, with 275.5% growth in fish and seafood).
- Growth in exports to the Eurozone countries was 5.0%, higher than for the EU as a whole. Indeed, it was many of the non-Eurozone countries (such as Denmark, Hungary and Latvia) that saw steep falls in 2009.

UK Exports of Food & Non-alcoholic Drinks to the EU, 2008-2009

		2008	2009	% change 08-09
	TOTAL EU	7,377.5	7,644.3	3.6
1 (-)	**Ireland**	2,449.2	2,589.0	5.7
2 (-)	**France**	1,142.3	1,211.4	6.0
3 (-)	**Netherlands**	777.5	847.8	9.0
4 (-)	**Germany**	688.6	659.9	-4.2
5 (-)	**Spain**	574.6	579.7	0.9
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8 (-)	Denmark	220.9	160.2	-27.5
9 (+1)	**Portugal**	118.6	153.6	29.6
10 (-1)	Sweden	129.7	129.8	0.0
11 (-)	Poland	116.4	113.0	-3.0
12 (-)	**Greece**	86.1	78.8	-8.5
13 (-)	**Finland**	42.5	47.1	10.8
14 (-)	**Cyprus**	42.3	45.7	8.2
15 (+3)	Czech Republic	32.2	39.8	23.5
16 (-)	**Austria**	33.6	37.5	11.6
17 (-)	**Malta**	33.0	35.7	8.3
18 (-3)	Hungary	40.2	27.9	-30.7
19 (-)	Romania	15.2	14.7	-3.1
20 (-)	**Slovakia**	11.4	10.6	-7.3
21 (-)	Lithuania	9.7	10.1	4.4
22 (+2)	Bulgaria	5.5	7.0	27.4
23 (-)	Estonia	7.0	6.3	-9.3
24 (-2)	Latvia	8.5	5.6	-34.9
25 (-)	**Slovenia**	3.6	4.3	19.1
26 (-)	**Luxembourg**	3.3	4.2	26.5

Source: Leatherhead Food Research

Note: Eurozone members in **bold**

Changes in ranking position are versus 2008

Non-EU

- The non-EU region showing the highest rate of growth for UK food and drink exporters in 2009 was Oceania, up 15.9% including 17.2% growth to Australia and 6.8% growth to New Zealand.
- Exports to North America were also well up at +14.8%, with the US and Canada showing strong performances, up 17.4% and 10.5% respectively.
- Exports to Other Western Europe grew 11.9% with Switzerland leading the way at +15.4% (strongly led by meat), followed by Turkey at +13% (growth being driven by the dairy and bakery categories) and Norway at +9.2% (sugars +20.7%).
- Asia remains a buoyant region as well, up 11.3% overall with Vietnam continuing to be one of the fastest growing non-EU markets, up 68.0% (with meat +54.8%) and China also progressing (+30.7% including fats and oils +190.8%). A decline of 7.5% to the leading Asian market of Japan, however, has dampened the performance of the region as a whole.
- The Middle East region also continues to perform strongly up 10.8% with the two key Middle Eastern markets of the UAE and Saudi Arabia well up at +18.3% and +14.0% respectively.
- The sluggish Russian market (-3.2%) has dragged down the non-EU Eastern Europe region (just +0.3% overall), whilst a 72.6% collapse in exports to Venezuela (due to a sharp drop in exports of milk powder), led to a 18.8% decline in exports to Latin America and the Caribbean.

UK Exports of Food & Non-alcoholic Drinks to the Non-EU, 2008-2009

	2008	2009	% change 08-09
Other Western Europe	**241.2**	**269.8**	**11.9**
Norway	116.8	127.6	9.2
Switzerland	55.2	63.7	15.4
Turkey	23.1	26.1	13.0
Eastern Europe	**124.9**	**125.3**	**0.3**
Russia	100.0	96.8	-3.2
Ukraine	12.6	16.5	31.0
North America	**372.9**	**428.3**	**14.8**
United States	258.1	303.0	17.4
Canada	112.5	124.3	10.5
Asia	**337.9**	**376.1**	**11.3**
Japan	86.1	79.7	-7.5
Hong Kong	55.3	66.9	21.0
China	38.0	49.7	30.7
Thailand	23.9	23.9	0.2
South Korea	22.4	23.2	3.4
Malaysia	19.4	22.6	16.7
Singapore	18.2	21.3	16.9
Vietnam	12.1	20.3	68.0
India	11.5	12.8	11.1
Middle East	**279.9**	**310.1**	**10.8**
United Arab Emirates	75.4	89.2	18.3
Saudi Arabia	66.6	75.9	14.0
Israel	30.3	35.9	18.2
Kuwait	30.4	26.4	-13.0
Africa	**295.9**	**290.6**	**-1.8**
Nigeria	58.3	63.6	9.2
Egypt	51.9	74.1	42.9
South Africa	31.4	27.9	-11.4
Algeria	34.5	23.8	-31.0
Latin America & the Caribbean	**130.7**	**106.1**	**-18.8**
Brazil	17.9	19.6	9.3
Venezuela	38.0	10.4	-72.6
Mexico	8.5	7.7	-9.0
Oceania	**81.7**	**94.7**	**15.9**
Australia	68.8	80.7	17.2
New Zealand	12.2	13.0	6.8

Source: Leatherhead Food Research