

Trade Snapshot

H1 2025

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FIDEIA
Food & Drink
Exporters Association



Executive summary

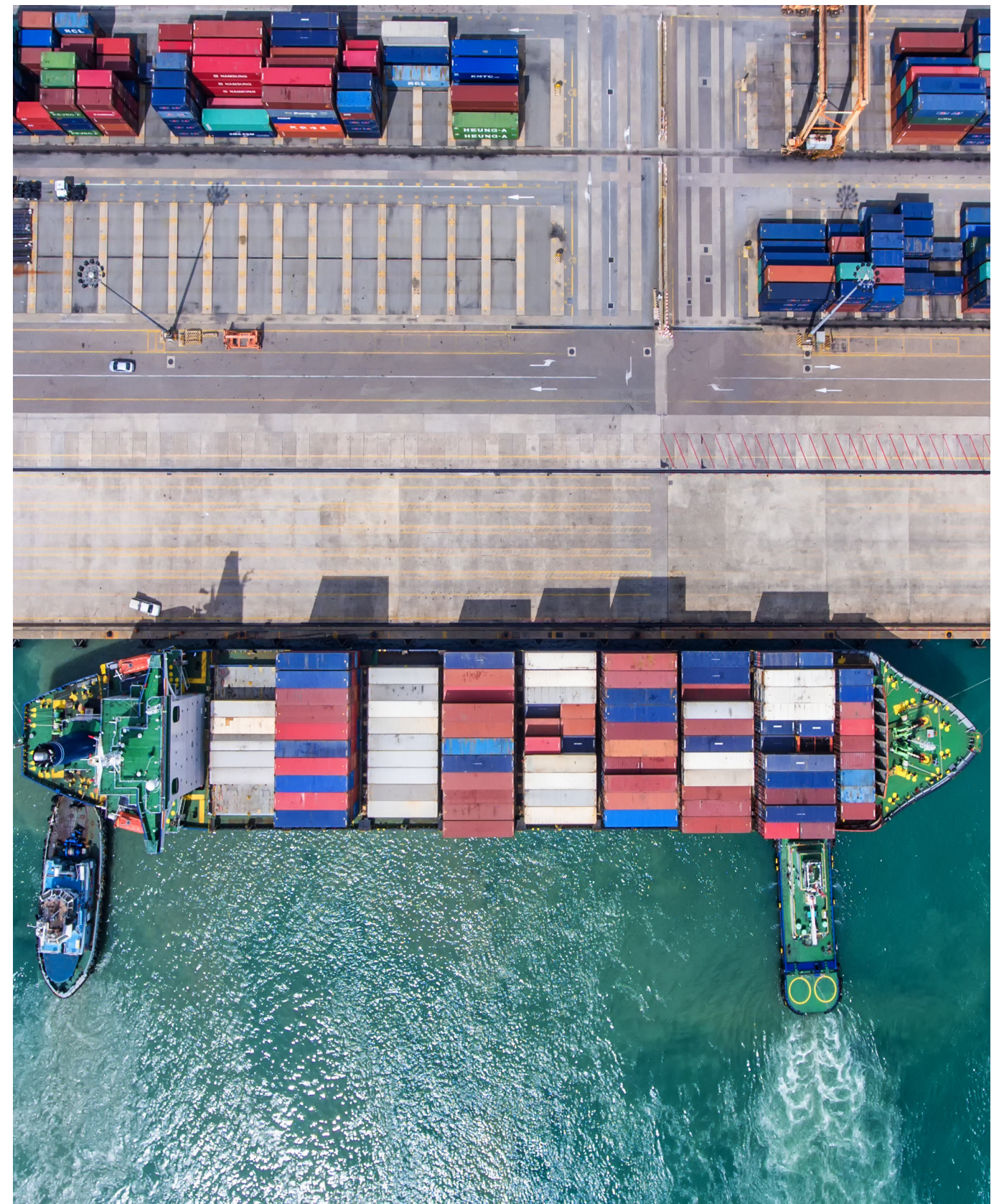
The Food and Drink Federation's (FDF) Trade Snapshot provides an overview of the UK's food and drink trade performance. It explores the key trends, challenges and opportunities in global markets. The data for H1 illustrates a fast-evolving trade landscape following the introduction of the US administration's global tariffs on 5 April.

UK food and drink exports across H1 reached £12.4bn, up 6.8% year-on-year; excluding alcohol exports totalled £8.9bn. While export volumes rose 7.2% year-on-year, exports remain 13% lower than 2023 levels. UK exporters continue to diversify across global markets with non-EU export growth continuing to outperform those to the EU. The top export destinations remain Ireland, France and the USA, with the USA showing a robust 18.9% year-on-year rise despite the introduction of new US tariffs.

Imports of food and drink reached a record £32.8bn (+5.5% year-on-year), with non-EU imports climbing 15.1%, a 2.7pp increase in the share of total imports. Canada and China led this growth, with imports rising 39.0% and 17.5%, respectively. Under the Common Sanitary and Phytosanitary (SPS) agreement, the UK and EU are expected to adopt the same controls on imports as Rest of World countries. This could lead to additional burdens for non-EU imports, with the removal of the current UK risk-based approach introduced in 2024.

The UK-EU negotiations on a Common Sanitary and Phytosanitary (SPS) Area provide an opportunity to amplify gains in EU trade by cutting certification and inspection burdens, particularly for short shelf-life goods and mixed consignments. There are positive signs of recovery for EU exports, which have struggled since 2019. Maintaining clear guidance and predictable processes at the border remains essential to preserve momentum going into H2.

The UK has an opportunity to make progress on wider trade policy. The 10% universal tariff increase with the US still applies to UK food and drink products despite the Economic Prosperity Deal. The EU has now concluded an agreement with the US, where in some cases their products have more favourable outcomes than the UK. Prioritising lowering US barriers after strong H1 momentum would sustain competitiveness moving forward. Retaliatory and rebalancing measures against US goods are also opening near-term export opportunities for UK suppliers, especially across North America and China.



EXPORTS

- All food and drink exports reached £12.4bn for the first half of 2025, a 6.8% increase year-on-year. Food and non-alcoholic drink exports reached £8.9bn.
- Export volumes are showing recovery, with kilogram exports 7.2% higher than the previous year. Although volumes remain 13% lower than 2023 levels, the return to year-on-year growth marks a welcome and positive shift in trend.
- The Non-EU share of exports continues to grow. It is important that this is considered in UK/EU SPS negotiations to maintain our industry's global footprint.
- Most products are delivering robust value gains, with salmon (+22.1%) and milk & cream (+21.3%) also having strong volume growth.
- India enters the top twenty markets with 11.6% growth. The UK-India trade deal signed at the end of July will remove or reduce tariffs on selected UK food and drink exports. By year 10, 85% of UK exports will enter India tariff free.
- It has been two years since the Australia-New Zealand trade deal was signed. Exports to Australia remain broadly stable compared to last year, while shipments to New Zealand grew 19.7%.
- Given low MFN tariffs and limited domestic production in the GCC, we expect a range of new export opportunities to be provided at entry into force of a comprehensive trade agreement.

Data Sources: His Majesty's Customs & Excise



KEY INDICATORS

	H1 2025	H1 2024	Change 2024 - 25
Food & non-alcoholic drink	£8.9bn	£8.2bn	8.4%
All food & drink	£12.4bn	£11.6bn	6.8%
EU	£7.1bn	£6.8bn	4.2%
Non-EU	£5.3bn	£4.7bn	10.6%
EU share	57.6%	59.1%	-1.5pp
Non-EU share	42.4%	40.9%	1.5pp

TOP TEN EXPORTS

	H1 2025	Value change 2024 - 25	Volume change 2024 - 25
Whisky	£2.5bn	1.0%	-3.1%
Salmon	£586.8m	22.1%	42.0%
Milk and cream	£502.0m	21.3%	2.0%
Cheese	£482.6m	10.9%	-0.6%
Chocolate	£454.3m	12.3%	-7.8%
Beef	£366.5m	15.3%	-8.8%
Soft drinks	£362.1m	11.2%	N/A
Lamb and mutton	£345.2m	14.9%	16.9%
Gin	£298.4m	17.6%	6.3%
Breakfast cereals	£292.6m	-3.0%	6.7%

TOP PERFORMING PRODUCTS

		
Infant food	Whey	Cereal grains
H1 2025 value Value change Volume change	H1 2025 value Value change Volume change	H1 2025 value Value change Volume change
£106.3m 84.1% 34.0%	£68.5m 39.1% 26.6%	£27.6m 28.6% 31.1%

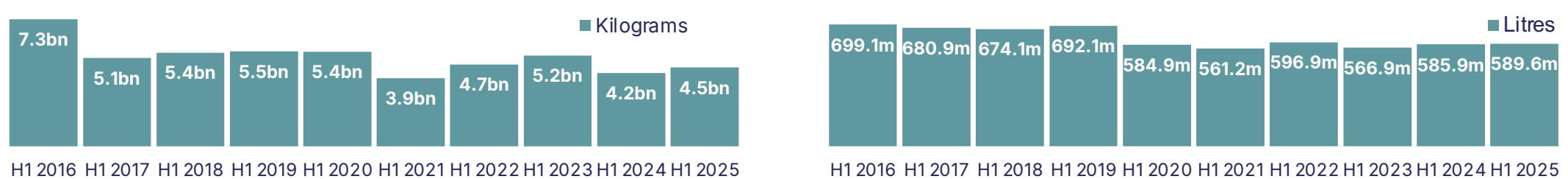
EXPORT VOLUMES

Unit of measurement	H1 2025	Change 2023 - 2025	Change 2024 - 2025
Kilograms (KG)	4.5bn	-13.0%	7.2%
Litres (L)	589.6m	4.0%	0.6%
Litres of pure alcohol (LPA)	230.1m	-1.8%	0.5%

TOP TWENTY MARKETS

Ireland	£2.2bn	▲ 6.9%
France	£1.4bn	▲ 1.5%
USA	£1.4bn	▲ 18.9%
Netherlands	£883.2m	▼ -1.4%
Germany	£540.0m	▼ -0.7%
Belgium	£434.6m	▲ 15.3%
China	£396.3m	▲ 10.0%
Spain	£354.2m	▲ 6.0%
Italy	£273.5m	▲ 10.3%
Poland	£228.7m	▼ -0.2%
UAE	£226.3m	▲ 7.6%
Canada	£212.7m	▲ 15.6%
Australia	£202.6m	▼ -0.9%
Turkey	£201.3m	▲ 68.6%
Singapore	£199.6m	▼ -10.9%
Norway	£161.1m	▲ 30.0%
Japan	£153.7m	▼ -11.7%
Sweden	£153.4m	▲ 18.1%
Taiwan	£152.1m	▼ -8.4%
India	£148.7m	▲ 11.6%

EXPORT VOLUMES OVER TIME



IMPORTS

- Imports continue their strong upward trend, with all food & drink reaching £32.8bn, up 5.5% year-on-year. This is supported by growth in beef, chocolate and fish imports.
- H1 2025 is a record year in terms of food volume imports too. Non-EU inflows are becoming a larger share, now 2.7pp higher than the previous year.
- Under the SPS agreement, the UK and EU are expected to adopt the same controls on imports from rest of world countries. This could lead to additional burdens compared to the current UK risk-based approach introduced in 2024.
- Canada (+39.0%) and China (+17.5%) are leading the growth of Non-EU inflows. Other notable increases include Norway and Morocco.
- The temporary easement on medium-risk fruit and vegetables from the EU was extended to the end of the Transitional Staging Period (31 Jan 2027) ahead of the SPS deal. This easement ensures business continuity and keeps produce supply chains efficient during the period of negotiation.
- Imports from Ireland showed strong growth and will benefit from the decision to [cancel checks](#) on medium risk goods from the island of Ireland.
- The UK extended tariff concessions for most Ukraine trade until 2029, underpinning continuity in oils, grains, and agri-inputs relevant to food manufacturing.

Data Sources: His Majesty's Customs & Excise

KEY INDICATORS

	H1 2025	H1 2024	Change 2024 - 25
Food & non-alcoholic drink	£30.4bn	£28.5bn	6.4%
All food & drink	£32.8bn	£31.1bn	5.5%
EU	£22.3bn	£22.0bn	1.5%
Non-EU	£10.5bn	£9.1bn	15.1%
EU share	67.9%	70.6%	-2.7pp
Non-EU share	32.1%	29.4%	2.7pp

TOP TEN IMPORTS

	H1 2025	Value change 2024 - 25	Volume change 2024 - 25
Fruits	£3.0bn	8.8%	8.4%
Vegetables	£2.0bn	-3.0%	N/A
Poultry	£1.8bn	12.4%	5.0%
Wine	£1.7bn	-6.5%	-6.4%
Chocolate	£1.4bn	18.0%	-9.9%
Fish	£1.1bn	14.3%	1.2%
Cheese	£1.1bn	11.4%	5.3%
Savoury snacks	£1.1bn	-0.8%	-1.0%
Soft drinks	£999.2m	5.3%	N/A
Beef	£997.6m	20.6%	-2.7%

UKRAINE TARIFF CONCESSIONS



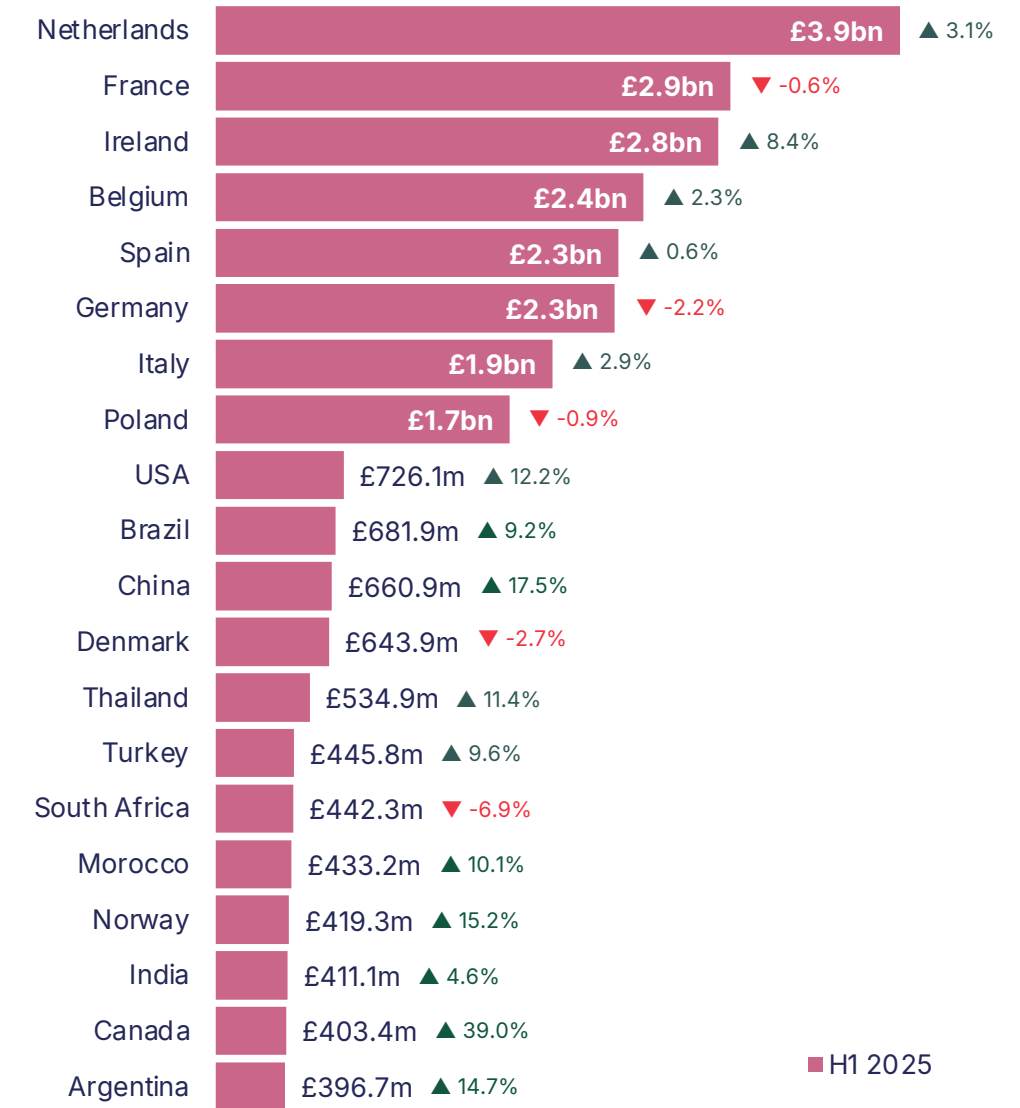
Most UK-Ukraine trade stays tariff-free until 2029, supporting Ukraine's recovery and giving businesses long-term certainty.

Oils, grains, and other agri-foods are flagged for opportunity under the extension.

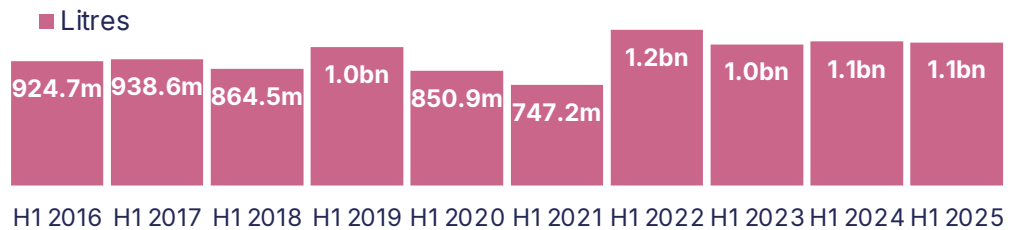
IMPORT VOLUMES

Unit of measurement	H1 2025	Change 2023 - 2025	Change 2024 - 2025
Kilograms (KG)	19.6bn	17.1%	5.5%
Litres (L)	2.3bn	-0.5%	-1.2%
Litres of pure alcohol (LPA)	46.7m	-3.6%	20.9%

TOP TWENTY MARKETS



IMPORT VOLUMES OVER TIME



USA

- On 8 May, the UK and US announced an Economic Prosperity Deal framework. For food and drink, the deal's immediate effects are limited with no change to the additional 10% duty that was introduced from 5 April 2025.
- Exports to the USA reached £1.4bn in H1 2025, a 18.9% increase year-on-year, with volumes up across kilograms (+18.3%) and litres (+18.7%). This growth shows momentum persisted into Q2.
- [US Customs decision to exempt in-transit cargo loaded before 5 April and arriving by 27 May from the 10% duty](#), likely mitigated near-term impacts and sustained orders.
- High growth in UK exports were seen in infant food (+160.0%), salmon (+98.6%), soft drinks (+42.4%), and animal oils (+43.0%).
- The UK faces higher rates than the EU on some products such as infant food, ice cream, and soft drinks, but holds relative advantages on others such as roasted coffee, sweet biscuits and breakfast cereals. Focus should turn to reducing tariffs where we are experiencing a higher duty than EU producers, to maintain competitiveness.
- Global retaliatory measures against US goods are opening short-term export opportunities for UK suppliers, with clear export gains overall across North America and China.
- This is amid notable declines in US food and drink exports to Canada (-8.9%), Mexico (-3.9%) and China (-51.0%) during H1.




Data Sources: His Majesty's Customs & Excise
ITC Trade Map

KEY INDICATORS			
	H1 2025	H1 2024	Change 2024 - 25
Exports	£1.4bn	£1.2bn	18.9%
Imports	£726.1m	£647.2m	12.2%
Trade Balance	£678.7m	£534.6m	27.0%

TOP TEN EXPORTS			
	H1 2025	Value change 2024 - 25	Volume change 2024 - 25
Whisky	£458.9m	-3.9%	-3.4%
Salmon	£227.6m	98.6%	131.1%
Gin	£99.6m	23.8%	7.1%
Animal oils	£77.7m	43.0%	21.4%
Infant food	£62.4m	160.0%	109.4%
Beer	£49.5m	3.6%	10.5%
Spirits	£48.2m	45.9%	8.3%
Wine	£47.8m	25.9%	43.5%
Soft drinks	£45.1m	42.4%	N/A
Cheese	£36.3m	20.4%	3.3%


VOLUMES TRADED WITH THE USA				
Unit of measurement	Exports H1 2025	Change 2024 - 2025	Imports H1 2025	Change 2024 - 2025
Kilograms (KG)	166.4m	18.3%	929.2m	44.6%
Litres (L)	73.4m	18.7%	32.0m	-6.4%
Litres of pure alcohol (LPA)	33.6m	20.0%	14.3m	26.2%

COMPARISON OF TARIFFS INTO THE USA			
	Previous tariff	UK tariff	EU tariff
1806: Chocolate	3.5 - 10%	13.5 - 20%	15%
2105: Ice cream	20%	30%	20%
220210: Soft drinks	10%	20%	15%
090121: Roasted coffee	0%	10%	15%
210390: Mixed sauces	6.4%	16.4%	15%
190110: Infant food	14.9 - 17.5%	24.9 - 27.5%	15 - 17.5%
190531: Sweet biscuits	0%	10%	15%
090230: Tea	0%	10%	15%
190410: Breakfast cereals	1.1%	11.1%	15%
1704: Sugar confectionery	5.6%	15.6%	15%

EXPORT OPPORTUNITIES WITH COUNTRIES HIT BY US TARIFFS														
	H1 imports from USA and notable declines		H1 imports from UK and notable increases			H1 imports from USA and notable declines		H1 imports from UK and notable increases			H1 imports from USA and notable declines		H1 imports from UK and notable increases	
Canada	Total	£12.3bn -8.9%	Total	£212.7m +15.6%	Mexico	Total	£11.0bn -3.9%	Total	£54.4m +37.3%	China	Total	£3.9bn -51.0%	Total	£396.3m +10.0%
	Cereals	£266.7m -35.0%	Fish	£26.5m +305.5%		Fish	£17.3m -47.8%	Animal & veg oils	£0.2m +121.9%		Cereals	£23.0m -98.0%	Cereals prep	£32.7m +52.3%
	Animal & veg oils	£329.0m -18.4%	Fruit & nuts	£0.2m +181.6%		Vegetables	£219.4m -35.8%	Coffee, tea	£2.4m +97.9%		Fruit & nuts	£54.1m -80.2%	Confectionery	£1.6m +43.2%
	Vegetables	£1.3bn -17.7%	Dairy	£10.3m +101.7%		Confectionery	£440.2m -26.6%	Beverages	£46.0m +48.3%		Fruit & veg prep	£25.3m -67.7%	Fish	£90.2m +39.6%





EUROPEAN UNION





- Exports to the EU reached £7.1bn in H1, a 4.2% year-on-year increase, with volumes up in both kilograms (+4.5%) and litres (+0.6%).
- Volumes traded in Q2 rebounded, reversing the year-on-year decline seen in Q1. This is a welcome upturn given EU-bound exports have struggled since 2019.
- Over time, the profile of UK exports to the EU has evolved. This is led by rising demand for coffee, animal & vegetable oils and cereal grains, alongside declines in soups, oilseeds and wheat.
- With volumes turning positive and value growth steady, an SPS agreement would help amplify gains by cutting certification and inspection burdens, particularly for short shelf-life goods and mixed consignments. Small businesses will benefit most from cutting this red tape.
- Until SPS changes take effect, maintaining clear guidance and predictable processes at the border remains essential to preserve momentum going into H2.
- A new EU-US framework agreement for reciprocal, fair and balanced trade was agreed in August. Many EU exports face up to 15% into the US while the EU opens more to US goods.
- Over the course of H1, EU exports to the US reached £12.5bn (+2.2%), with some big movers such as cocoa and coffee & tea. The US sent £4.9bn worth, a 12.9% increase, with cereals and dairy seeing large increases.


Data Sources: His Majesty's Customs & Excise
ITC Trade Map


		Top Exports		Top Imports	
European Union	Export	Whisky	£679.5m	Vegetables	£1.5bn
	Import	Cheese	£345.1m	Chocolate	£1.3bn
	£7.1bn	£22.3bn	Lamb & mutton	£334.2m	Wine

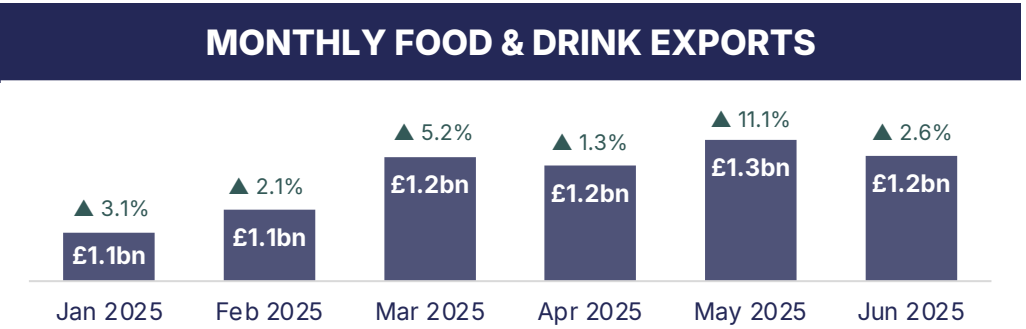
		Top Exports		Top Imports	
Ireland	Export	Milk & cream	£235.9m	Beef	£691.9m
	Import	Soft drinks	£160.2m	Cheese	£196.7m
	£2.2bn	£2.8bn	Chocolate	£122.9m	Chocolate

		Top Exports		Top Imports	
France	Export	Salmon	£211.1m	Wine	£542.9m
	Import	Whisky	£207.2m	Savoury snacks	£186.7m
	£1.4bn	£2.9bn	Lamb & mutton	£201.9m	Cheese

		Top Exports		Top Imports	
Netherlands	Export	Chocolate	£64.3m	Vegetables	£377.2m
	Import	Cheese	£61.6m	Poultry	£352.3m
	£883m	£3.9bn	Beef	£58.6m	Potatoes

		Top Exports		Top Imports	
Germany	Export	Whisky	£78.6m	Chocolate	£258.4m
	Import	Lamb & mutton	£54.6m	Savoury snacks	£144.8m
	£540m	£2.3bn	Chocolate	£28.2m	Soft drinks

		Top Exports		Top Imports	
Belgium	Export	Lamb & mutton	£44.2m	Potatoes	£271.9m
	Import	Whisky	£37.5m	Chocolate	£257.8m
	£435m	£2.4bn	Butter	£33.1m	Soft drinks



VOLUMES TRADED WITH THE EU

Unit of measurement	Exports H1 2025	Change 2024 - 2025	Imports H1 2025	Change 2024 - 2025
Kilograms (KG)	3.5bn	4.5%	10.9bn	-5.5%
Litres (L)	433.1m	0.6%	1.9bn	-1.0%
Litres of pure alcohol (LPA)	81.7m	-9.6%	28.6m	17.9%

TOP PERFORMING EXPORTS OVER TIME

	H1 average 2016 - 2025	H1 average 2006 - 2015	Change
Vegetable flours	4.4m kg	1.7m kg	158%
Coffee	13.6m kg	5.3m kg	155%
Animal & veg oils	83.0m kg	32.9m kg	152%
Cereals grains	91.1m kg	43.7m kg	109%
Spirits	10.2m kg	5.0m kg	106%

WORST PERFORMING EXPORTS OVER TIME

	H1 average 2016 - 2025	H1 average 2006 - 2015	Change
Soups	4.4m kg	12.1m kg	-63.4%
Oilseeds	73.1m kg	190.2m kg	-61.6%
Turkey	6.2m kg	15.4m kg	-59.6%
Sugar	64.7m kg	137.0m kg	-52.8%
Wheat	376.6m kg	769.9m kg	-51.1%

EU TRADE WITH THE USA

H1 total

£4.9bn

12.9%

Big changes

Cereals

£468.6m

263.2%

Dairy

£38.9m

117.6%

Fruit & nuts

£1.4bn

26.9%

Cocoa

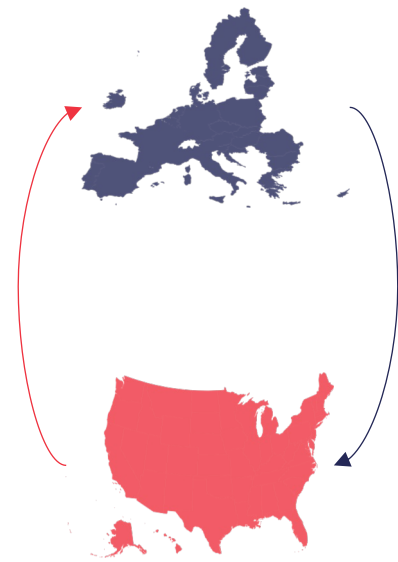
£20.2m

-73.9%

Fruit & veg prep

£80.2m

-33.4%



H1 total

£12.5bn

2.2%

Big changes

Cocoa

£730.3m

65.2%

Meat & fish prep

£211.0m

21.3%

Coffee, tea

£248.1m

11.0%

Cereals

£24.2m


-73.3%

Meat

£233.0m

-10.6%

TURKEY



- Round one of negotiations for an enhanced UK–Turkey FTA took place in summer 2025. With exports up 68.6% to a record £201.3 million, an updated agreement provides an opportunity to maintain this growth.
- Updating this agreement provides the opportunity to increase Tariff Rate Quotas, exceeded by the UK in previous years, such as in sweet biscuits, tea, and oats.
- The mix of imports show some faster-growing lines: chocolate rose to £15.7m (+550%), juices (+77.1%), and pulses to £14.1m (+23.7%).
- Turkey is an agricultural powerhouse, producing many commodities that are non-sensitive to the UK. By reducing UK tariffs on products such as hazelnuts, sweet potatoes and olive oil, there are opportunities to diversify our supply chains.
- Eggs (+28.1%), sauces and condiments (+43.3%), and coffee (+54.6%) saw impressive export growth, alongside strong gains in selected alcoholic drinks.
- An update to the agreement provides the opportunity for the removal of costly bureaucratic processes such as the financial liability levy and the Resource Utilisation Support Fund.
- Turkey had the third-highest number of failed safety checks in 2024 with 40 rejections, highlighting the importance of successful robust SPS cooperation and clear guidance.

Data Sources: His Majesty's Customs & Excise
Food Standards Agency

TURKEY FOOD AND DRINK TRADE

	H1 2025	H1 2024	Change 2024 - 25
Exports	£201.3m	£119.4m	68.6%
Imports	£445.8m	£406.7m	9.6%
Trade Balance	-£244.5m	-£287.3m	-14.9%

TOP TEN EXPORTS

	H1 2025	Value change 2024 - 25	Volume change 2024 - 25
Whisky	£131.8m	99.9%	34.1%
Eggs	£14.4m	28.1%	11.7%
Gin	£9.4m	135%	44.1%
Sauces and condiments	£3.9m	43.3%	N/A
Chocolate	£3.8m	7.8%	-12.3%
Potatoes	£2.2m	-14.4%	-25.1%
Coffee	£1.9m	54.6%	16.9%
Spirits	£1.9m	-2.0%	-18.5%
Soft drinks	£1.6m	151%	N/A
Confectionery	£1.6m	41.4%	41.3%

TARIFF RATE QUOTA OPPORTUNITIES

	2024 exports	Tariff rate quota	Turkey global tariff
Tea	50 tonnes	45% tariff within 33t	7% + \$3,427 – \$10,125/t
Sugar confectionery	746 tonnes	0% tariff within 417t	9.1% + €89.67/100kg
Flaked Oats	20 tonnes	22.5% tariff within 17t	45%
Savoury biscuits	977 tonnes	0% tariff within 250t	€18.74/100kg
Sweet biscuits	284 tonnes	0% tariff within 167t	9%

H1 FOOD & DRINK TRADE

Exports

Year	Exports (£m)
H1 2016	£59.2m
H1 2017	£58.8m
H1 2018	£63.6m
H1 2019	£64.6m
H1 2020	£55.9m
H1 2021	£53.3m
H1 2022	£89.0m
H1 2023	£115.1m
H1 2024	£119.4m
H1 2025	£201.3m

Imports

Year	Imports (£m)
H1 2016	£169.1m
H1 2017	£186.0m
H1 2018	£216.9m
H1 2019	£236.9m
H1 2020	£255.8m
H1 2021	£266.5m
H1 2022	£325.2m
H1 2023	£374.2m
H1 2024	£406.7m
H1 2025	£445.8m


VOLUMES TRADED WITH TURKEY

Unit of measurement	Exports H1 2025	Change 2024 - 2025	Imports H1 2025	Change 2024 - 2025
Kilograms (KG)	21.4m	23.6%	260.9m	12.1%
Litres (L)	1.0m	71.0%	31.7m	-2.2%
Litres of pure alcohol (LPA)	8.5m	34.1%	0.0m	-35.9%


TOP TEN IMPORTS

	H1 2025	Value change 2024 - 25	Volume change 2024 - 25
Fruits	£111.7m	4.8%	-15.1%
Fish	£71.1m	11.0%	-4.8%
Confectionery	£32.2m	-21.2%	-23.4%
Prepared vegetables	£23.6m	-8.1%	N/A
Prepared fruit & veg	£21.9m	-10.6%	N/A
Soft drinks	£21.1m	15.6%	N/A
Vegetables	£17.8m	8.9%	N/A
Chocolate	£15.7m	550%	162.0%
Juices	£14.9m	77.1%	N/A
Pulses	£14.1m	23.7%	44.8%

BORDER NOTIFICATIONS



Turkey had the third highest number of failed safety checks, with 40 **rejections** over 2024.



70% of these rejections were of fruit & vegetables, followed by a few rejections in pet food and fish.

H1 FOOD & DRINK TRADE

Exports

Year	Exports (£m)
H1 2016	£59.2m
H1 2017	£58.8m
H1 2018	£63.6m
H1 2019	£64.6m
H1 2020	£55.9m
H1 2021	£53.3m
H1 2022	£89.0m
H1 2023	£115.1m
H1 2024	£119.4m
H1 2025	£201.3m

Imports

Year	Imports (£m)
H1 2016	£169.1m
H1 2017	£186.0m
H1 2018	£216.9m
H1 2019	£236.9m
H1 2020	£255.8m
H1 2021	£266.5m
H1 2022	£325.2m
H1 2023	£374.2m
H1 2024	£406.7m
H1 2025	£445.8m



Shaping the future of food and drink manufacturing

Our industry is at the heart of the nation's daily lives, providing nourishment and joy with a wide range of affordable and nutritious products for all.

Join us in creating a secure, sustainable future for food and drink.

fdf.org.uk

