

# Trade Snapshot

2025

fdf



# 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 2025 illustrates record trade values set against a backdrop of post-Brexit adjustment, US tariff disruption and shifting global trade dynamics.

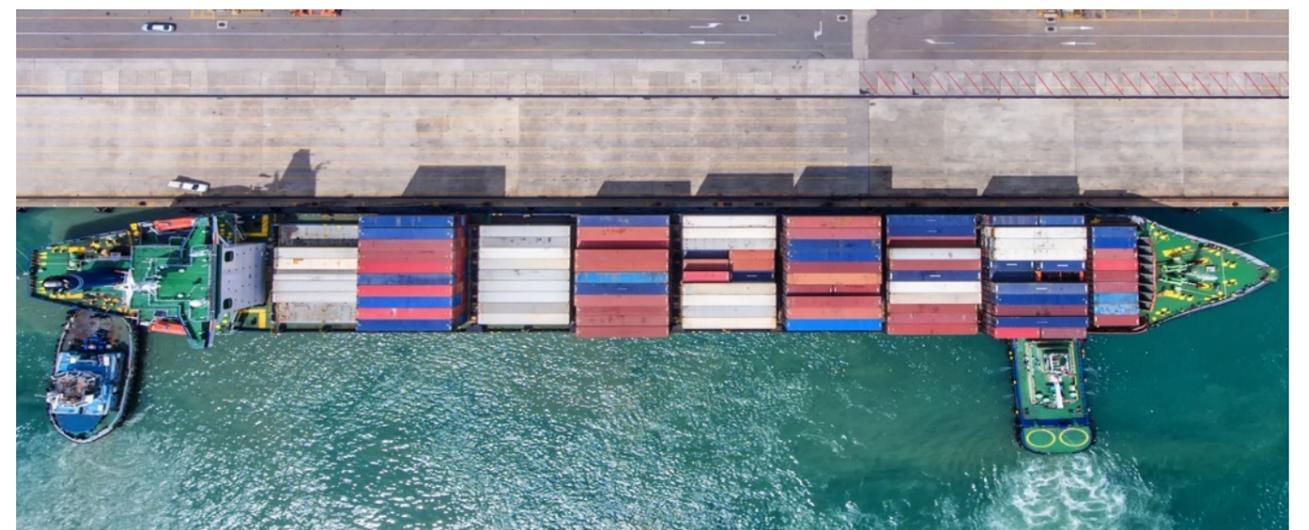
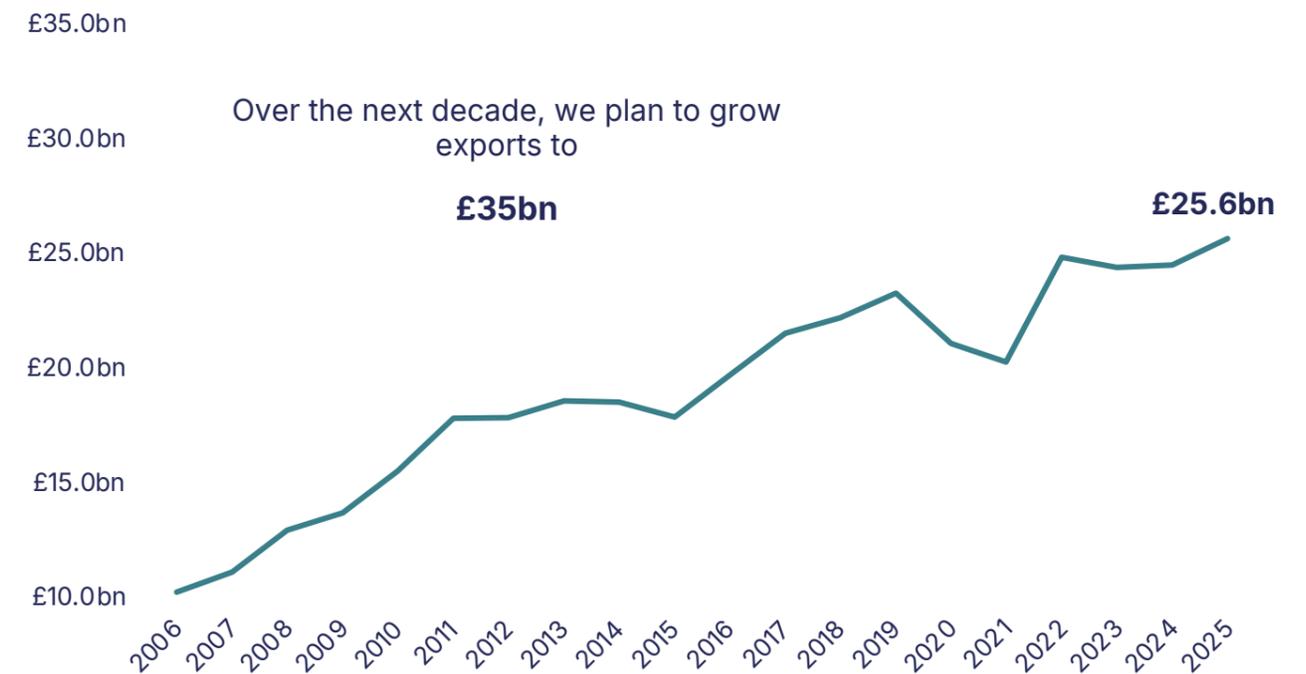
**UK food and drink exports reached £25.6bn in 2025 – the first time that food and drink has broken through the £25bn barrier** - up 4.8% year-on-year and the strongest annual export value on record. Excluding alcohol, exports totalled £18.1bn, up 6.9%. Export volumes showed a welcome recovery, with kilogram exports up 6.0% and litre exports up 6.2%, although they remain considerably lower than pre-Brexit levels. The top export destinations remain Ireland, France and the USA, though the re-introduction of US tariffs in 2025 – including a 10% levy now in place – underlines the importance of market diversification, with UK food and drink exports to the US falling 8.6% in H2 year-on-year.

**Imports of food and drink reached a historic high of £66.9bn, up 5.9% year-on-year.** Non-EU imports drove the fastest growth, with values rising 11.8% to £20.7bn and volumes climbing 13.9% in the past year, reflecting continued supply chain diversification towards Brazil, Canada and China. The top import categories were fruits, poultry and wine. Strong value growth alongside falling volumes for chocolate and beef points to the persistent impact of global inflation on import costs.

**The UK-EU Common Understanding requires all food and drink businesses — not just exporters — to dynamically align with EU food and agricultural regulations by mid-2027.** With EU food export volumes still around 31% below 2019 levels, reflecting the cumulative impact of Brexit, customs friction and TCA reorganisation, the stakes are high. Early and transparent communication on the SPS framework, and pre-alignment where the EU has moved ahead, will be essential to avoid further disruption and support a volume recovery.

**The UK's membership of CPTPP delivered its first meaningful returns in 2025,** with food export volumes to members growing 7.8% and exports to Mexico growing 26.2% to £148.4m, with further tariff benefits on the horizon — including ice cream tariffs, which will fall to zero. Indonesia, a CPTPP applicant, was a standout export performer with UK exports surging 52.0% to £40.5m. [The UK-Indonesia Economic Growth Partnership](#) signed in January 2026 formally commits the UK to share its CPTPP accession with Indonesia, who applied to join CPTPP in 2024. Indonesia accession to CPTPP would provide a significant market access opportunity.

## AMBITION FOR GROWTH: EXPORTS TRACKER



## EXPORTS

- Total food and drink exports reached £25.6bn for 2025, the strongest annual export performance on record in value terms. Food and non-alcoholic drink exports grew 6.9% year-on-year.
- Volumes exported showed a welcome recovery, with both kilogram and litre exports up at least 6.0%. There is still more recovery to be had, with volumes still considerably below the pre-Brexit peaks.
- Dairy products were a standout performer in 2025: milk and cream exports rose 22.5% in value and 10.3% in volume, approaching the £1bn threshold. Cheese exports also performed strongly, growing 9.4% to £971m.
- Exports to India have increased by 12.4% over 2025, reaching £330.3m. The UK-India FTA signed in July 2025 is the most significant post-Brexit trade deal, and the period between now and implementation is an opportunity to build distributor relationships and prepare for the commercial opportunity.
- Some of the fastest growing markets in 2025 were economies with growing middle class consumer bases. Colombia, Algeria and Indonesia are some of these, and this diversification is key for the industry to reach the £35bn in annual exports by 2035 set out in the [FDF's Ambition for Growth](#).
- FDEA:** Despite US tariff chaos, exports rose by 3.6% in 2025 - Premium chocolate, teas and organics thrive in health/indulgent trends, especially in affluent, wellness-driven California and New York.

Data Sources: His Majesty's Customs & Excise

## KEY INDICATORS

	2025	2024	Change 2024 - 25
Food & non-alcoholic drink	£18.1bn	£17.0bn	6.9%
All food & drink	£25.6bn	£24.5bn	4.8%
EU	£14.8bn	£14.0bn	5.2%
Non-EU	£10.9bn	£10.4bn	4.2%
EU share	57.6%	57.4%	-0.2pp
Non-EU share	42.4%	42.6%	0.2pp

## TOP TEN EXPORTS

	2025	Value change 2024 - 25	Volume change 2024 - 25
Whisky	£5.5bn	-0.8%	-4.3%
Chocolate	£1.0bn	10.0%	-6.8%
Milk and cream	£992.0m	22.5%	10.3%
Cheese	£971.2m	9.4%	4.4%
Salmon	£924.0m	-2.8%	6.3%
Beef	£837.4m	24.5%	-3.1%
Soft drinks	£745.2m	9.0%	N/A
Lamb and mutton	£677.5m	13.6%	9.9%
Breakfast cereals	£604.6m	-0.8%	18.7%
Gin	£602.6m	13.7%	0.3%

## FAST GROWING EXPORT MARKETS

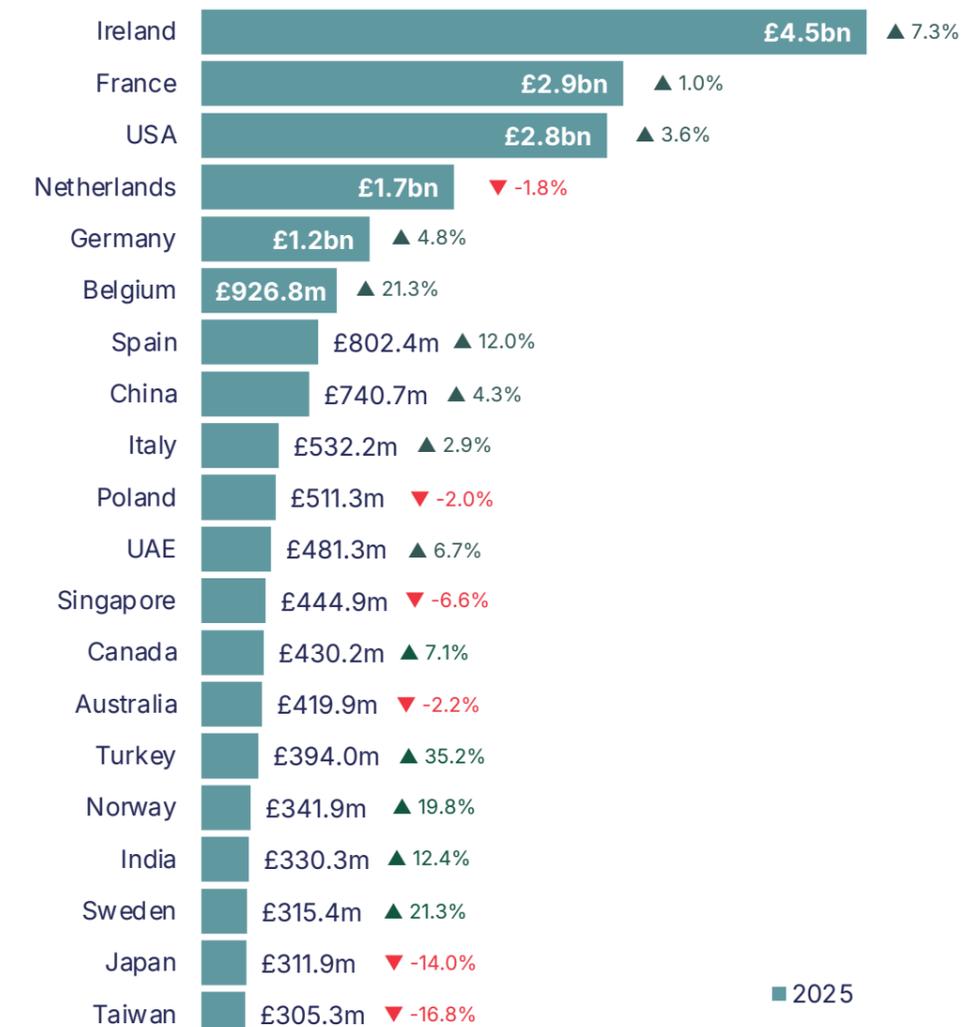
These are the fastest growing markets with export values over £10m, helping contribute to the export recovery of food and drink in 2025.

Colombia	£164.0m	153.7%
Pakistan	£28.8m	88.4%
Algeria	£30.7m	54.8%
Indonesia	£40.5m	52.0%
Lithuania	£80.4m	48.6%

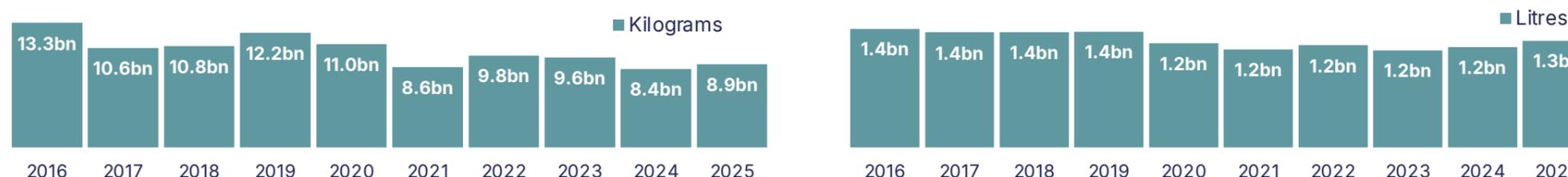
## EXPORT VOLUMES

Unit of measurement	2025	Change 2023 - 2025	Change 2024 - 2025
Kilograms (KG)	8.9bn	-7.3%	6.0%
Litres (L)	£1.3bn	9.7%	6.2%
Litres of pure alcohol (LPA)	490.6m	0.5%	-3.4%

## TOP TWENTY MARKETS



## EXPORT VOLUMES OVER TIME



## IMPORTS

- UK food and drink imports reached a historic high of £66.9bn in 2025, up 5.9% on 2024. Import volumes also rose to 38.5bn kg, 13.1% higher than in 2023 and 2.5% up on 2024.
- Non-EU imports grew fastest, with values up 11.8% to £20.7bn, and their share of imports increased to 30.9%, reflecting increased sourcing from countries such as Brazil, Canada and China; non-EU volumes were also 24.5% higher than in 2023 and 13.9% higher than in 2024.
- The top import categories were fruits, poultry, and wine. There is some contrast between strong value growth and negative volume growth for chocolate and beef, pointing to the impact of global inflation in driving up import bills.
- The [FDF's Ambition for Growth](#) calls on government to reduce import tariffs on non-sensitive ingredients for UK manufacturing by reviewing the UK global tariff and improving the duty suspensions programme to deliver more regular and predictable timetables.
- [International evidence](#) on healthy diets shows that where tariffs are applied to imported food products, they account for a small share of final retail prices, with domestic costs dominating consumer bills, while [IMF analysis](#) of 18 advanced economies concludes that "productivity gains from reducing input tariffs dominate those from reducing output tariffs", together strengthening the case for a focused UK duty suspension regime that prioritises key non-sensitive imported inputs, supporting both the cost of living and the growth agenda.

Data Sources: His Majesty's Customs & Excise

## KEY INDICATORS

	2025	2024	Change 2024 - 25
Food & non-alcoholic drink	£61.5bn	£57.6bn	6.7%
All food & drink	£66.9bn	£63.2bn	5.9%
EU	£46.2bn	£44.7bn	3.4%
Non-EU	£20.7bn	£18.5bn	11.8%
EU share	69.1%	70.7%	-1.6pp
Non-EU share	30.9%	29.3%	1.6pp

## TOP TEN IMPORTS

	2025	Value change 2024 - 25	Volume change 2024 - 25
Fruits	£5.8bn	10.2%	7.8%
Poultry	£3.8bn	14.2%	6.1%
Wine	£3.8bn	-4.6%	-6.0%
Vegetables	£3.6bn	0.6%	N/A
Chocolate	£3.4bn	15.9%	-6.1%
Savoury snacks	£2.4bn	3.4%	-0.6%
Cheese	£2.3bn	9.5%	4.7%
Fish	£2.2bn	13.5%	0.6%
Beef	£2.1bn	24.1%	-2.3%
Soft drinks	£2.1bn	7.6%	N/A

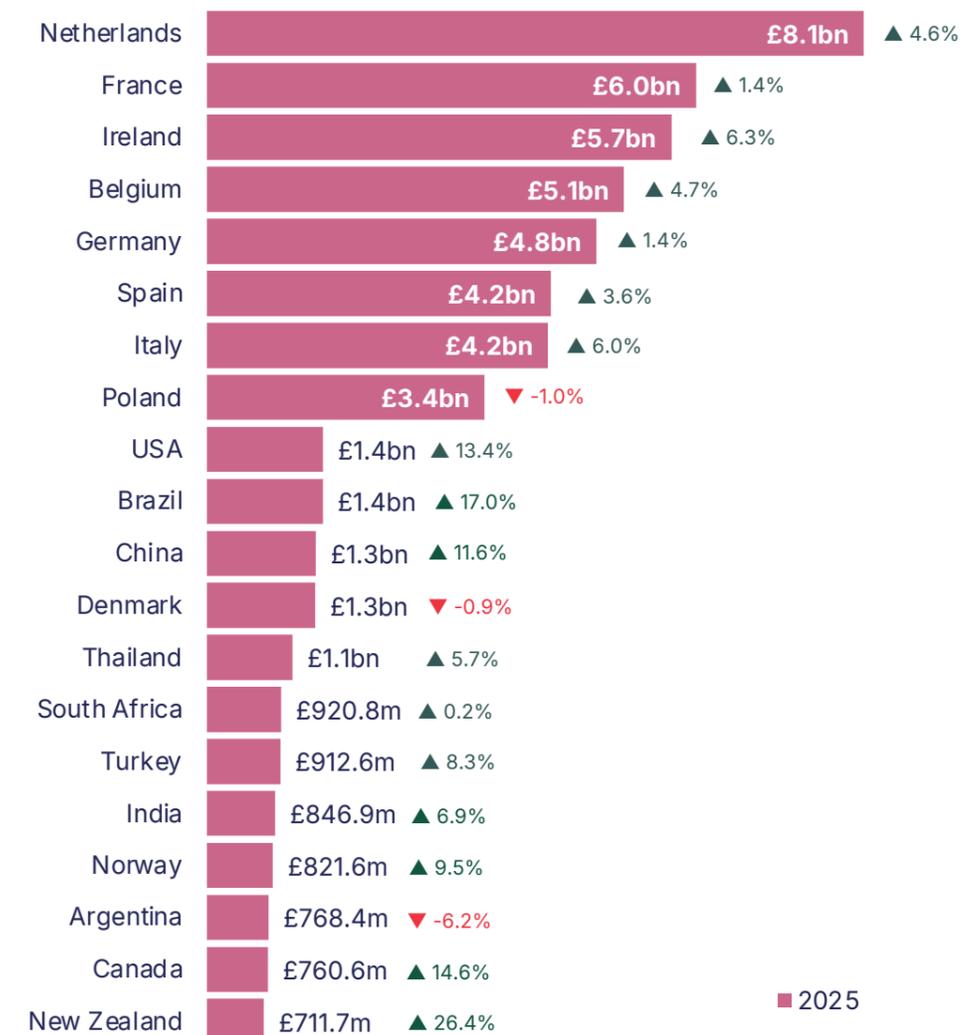
## REST OF WORLD IMPORT VOLUMES

Unit of measurement	2025	Change 2023 - 2025	Change 2024 - 2025
Kilograms (KG)	16.6bn	24.5%	13.9%
Litres (L)	778.1m	0.5%	-4.5%
Litres of pure alcohol (LPA)	38.3m	8.7%	9.4%

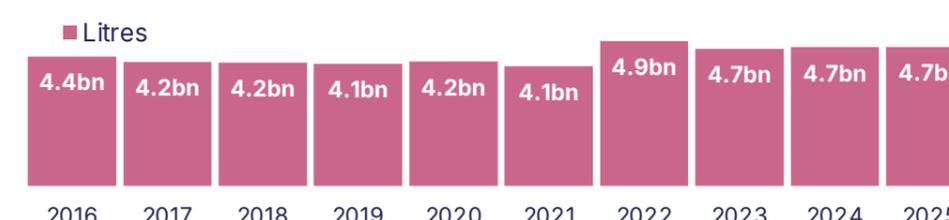
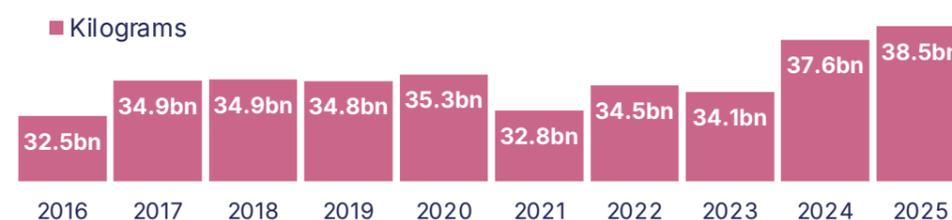
## IMPORT VOLUMES

Unit of measurement	2025	Change 2023 - 2025	Change 2024 - 2025
Kilograms (KG)	38.5bn	13.1%	2.5%
Litres (L)	4.7bn	1.4%	0.3%
Litres of pure alcohol (LPA)	96.5m	3.2%	7.9%

## TOP TWENTY MARKETS



## IMPORT VOLUMES OVER TIME

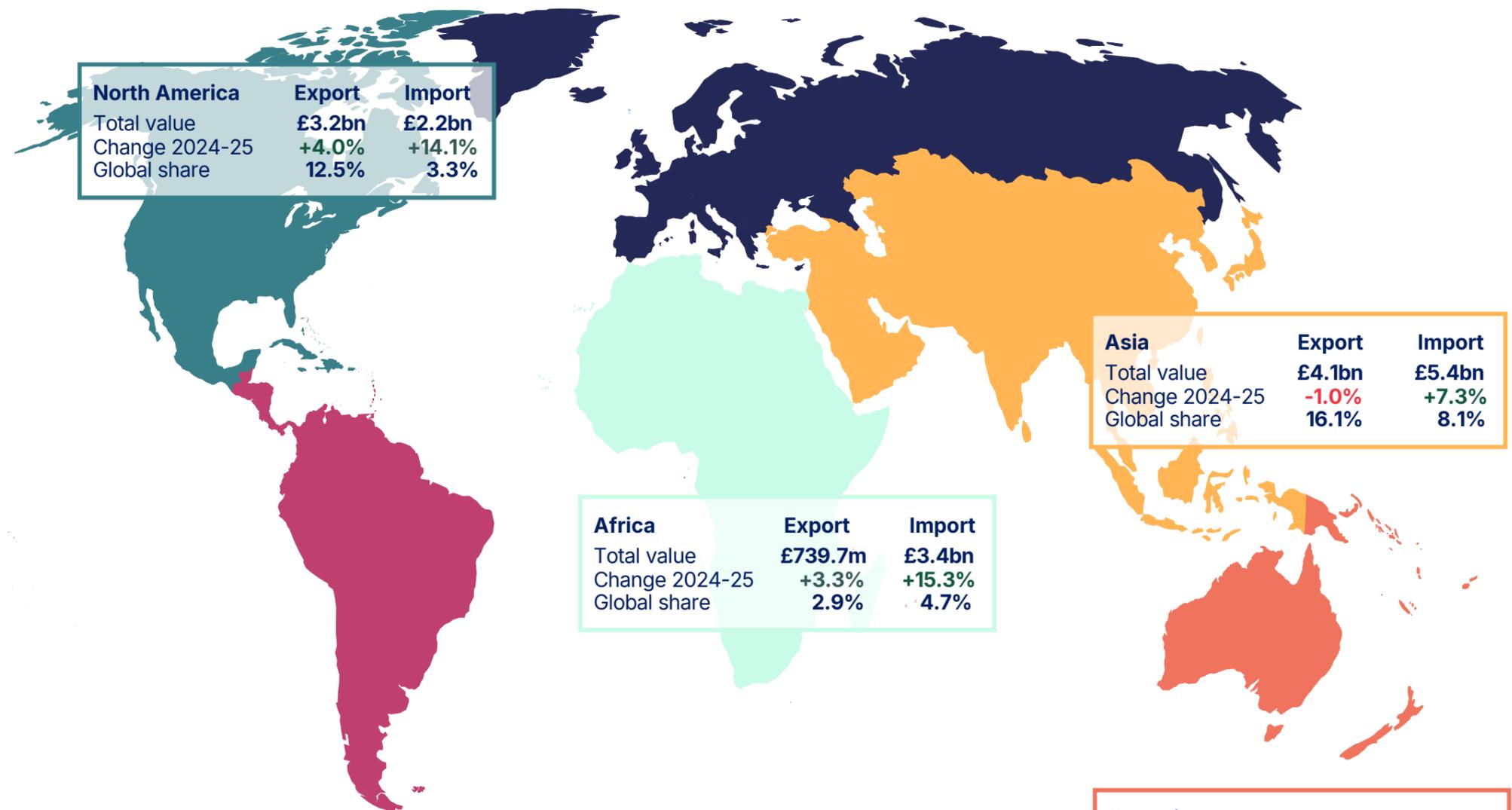


## WORLD TRADE

- Europe is our most important trade partner, representing 62.5% of our exports and 74.1% of our imports.
- Asia remains the UK's 2<sup>nd</sup> largest export region at £4.1bn, but fell by 1.0% in 2025. Ongoing Middle East disruption will make holding this level difficult, although FTA negotiations with the GCC are ongoing.
- Over 2025, the most significant development affecting UK food and drink trade prospects was the re-introduction of US tariffs. A 10% levy is now in place, replicating the UK's previous rate following the Supreme Court ruling against Trump's reciprocal tariffs.
- In H2 2025, UK food and drink exports to the US were 8.6% lower than in H2 2024, with categories like infant formula seeing sharp declines, underlining the impact of the new US tariff regime on the UK's largest non-EU export market. This contrasts with the 18.9% growth seen in H1 before the full impact of the tariffs.
- China's role in global food and drink trade is being reshaped by US tariffs. Chinese exports to the US fell 21.5% in 2025, while UK imports from China rose 11.6%, and Chinese exports to India and Turkey surged 78.6% and 67.1%, respectively. China is re-routing trade away from the US towards fast growing markets such as India, with the UK remaining an important destination.
- The UK's FTA with fast growing India is expected to take effect in summer 2026, with tariffs on products such as breakfast cereals, chocolate and soft drinks reduced in stages over ten years.

World	Export	Import
Total value	<b>£25.6bn</b>	<b>£66.9bn</b>
Change 2024-25	<b>+4.8%</b>	<b>+5.9%</b>

Europe	Export	Import
Total value	<b>£16.0bn</b>	<b>£49.5bn</b>
Change 2024-25	<b>+6.0%</b>	<b>+3.7%</b>
Global share	<b>62.5%</b>	<b>74.1%</b>



North America	Export	Import
Total value	<b>£3.2bn</b>	<b>£2.2bn</b>
Change 2024-25	<b>+4.0%</b>	<b>+14.1%</b>
Global share	<b>12.5%</b>	<b>3.3%</b>

Asia	Export	Import
Total value	<b>£4.1bn</b>	<b>£5.4bn</b>
Change 2024-25	<b>-1.0%</b>	<b>+7.3%</b>
Global share	<b>16.1%</b>	<b>8.1%</b>

Africa	Export	Import
Total value	<b>£739.7m</b>	<b>£3.4bn</b>
Change 2024-25	<b>+3.3%</b>	<b>+15.3%</b>
Global share	<b>2.9%</b>	<b>4.7%</b>

Central and South America	Export	Import
Total value	<b>£1.1bn</b>	<b>£4.8bn</b>
Change 2024-25	<b>+17.2%</b>	<b>+12.8%</b>
Global share	<b>4.1%</b>	<b>7.2%</b>

Oceania	Export	Import
Total value	<b>£474.6m</b>	<b>£1.4bn</b>
Change 2024-25	<b>-1.5%</b>	<b>+24.7%</b>
Global share	<b>1.9%</b>	<b>2.2%</b>

## EUROPEAN UNION

- The UK has committed to align with a wide range of EU food and agricultural regulations - extending beyond higher-risk SPS (Sanitary and Phytosanitary) measures to cover most food policy.
- This deal will impact all domestically produced/sold food and drink, as based on dynamic alignment, broad areas of EU food law will apply to the UK market. The key message is that **all UK businesses will need to be ready** to dynamically align with EU rules on the production, sale and trade of plants and animal products and food and feed safety by mid-2027, not just exporters to the EU.
- The [FDF has made ten recommendations](#) for the implementation of the UK-EU Common Understanding.
- The export volume graph underlines how UK exports have structurally reset at a lower level since 2020. Despite some recovery in 2025, food export volumes are 31% lower in 2025 than in 2019.
- UK food exports to the EU have fallen sharply across most product groups post-Brexit, including categories that face minor or no SPS control (such as sugar confectionery, bakery goods and chocolate) suggesting that changes in supply chains and administrative barriers such as customs and logistics under the TCA are also having a significant impact.
- FDEA:** Agricultural attachés are actively removing bespoke border frictions and tradeshows like SIAL, Anuga, ISM and PLMA will provide a powerful showcase for UK innovations - securing deals and recovering lost volumes.

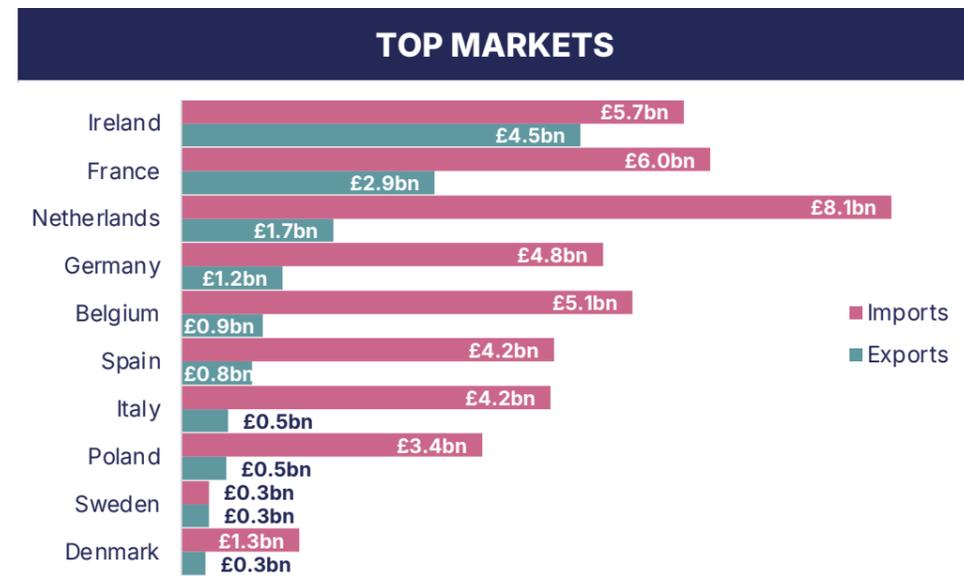
Data Sources: His Majesty's Customs & Excise

### SPS AGREEMENT: NOT JUST FOR EXPORTERS

Who	What	When
All UK food & drink businesses	Dynamic alignment with EU SPS rules	All businesses must be ready by mid-2027
Including domestic-only producers	<ul style="list-style-type: none"> <li>Food safety</li> <li>Animal health</li> <li>Plant health</li> <li>Feed safety</li> </ul>	~ 18 months from now

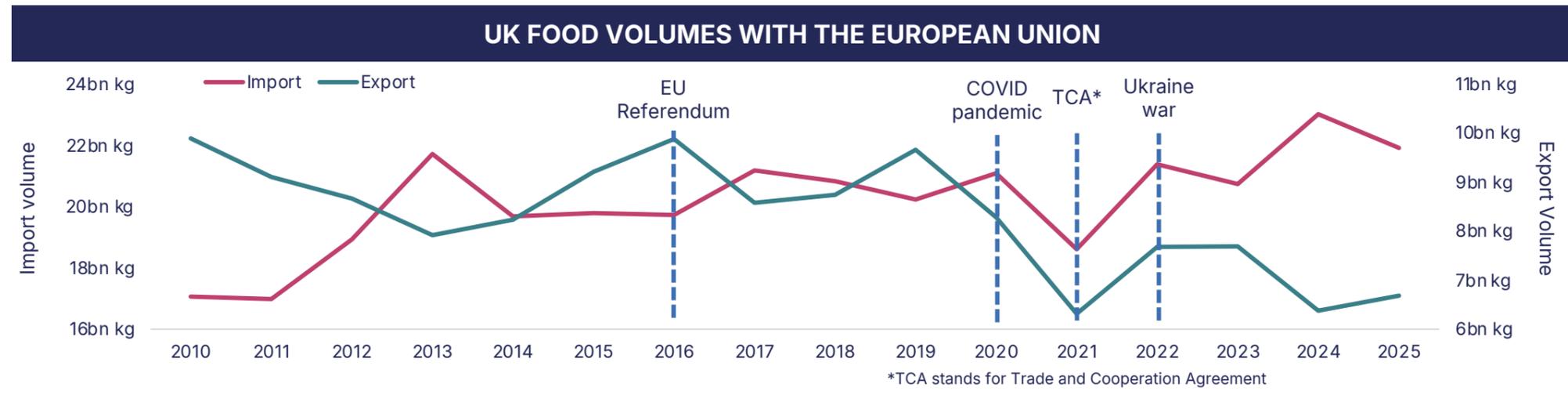
- ### IMPLEMENTATION OF UK-EU COMMON UNDERSTANDING
- The following recommendations set out how the Common Understanding can be used as a springboard for readiness, competitiveness, and long-term resilience.
- Use the Common Understanding as a springboard for business preparation.
  - Pre-align in areas where the EU has outpaced the UK.
  - Communicate forthcoming changes to UK border policy.
  - Robustly assess the impact of retaining national regulation of retained policies.
  - Futureproof the agreement and maintain emergency flexibility.
  - Provide transitional periods and clarity for long shelf-life products.
  - Plan for the future of the Northern Ireland Retail Movement Scheme.
  - Monitor future EU policy development.
  - Ensure appropriate UK voice and access to EU systems and databases.
  - Support export readiness and promotion.

European Union		Top Exports		Top Imports	
Export	Import	Whisky	£1.5bn	Chocolate	£3.2bn
£14.8bn	£46.2bn	Chocolate	£754.5m	Wine	£2.8bn
		Beef	£754.5m	Vegetables	£2.8bn



### EXPORT VOLUMES OVER TIME BY PRODUCT

Product	Annual average 2014 - 19	Annual average 2020 - 25	Change
Cereals	2.4bn kg	1.6bn kg	-33.8%
Dairy products	1.1bn kg	1.1bn kg	0.9%
Meat	647.8m kg	522.9m kg	-19.3%
Bakery goods/prep	554.0m kg	489.1m kg	-11.7%
Fish & crustaceans	310.5m kg	243.3m kg	-21.6%
Sugars & sugar confectionery	372.1m kg	191.1m kg	-48.6%
Chocolate & cocoa prep	146.8m kg	136.8m kg	-6.8%



## CPTPP



- The UK's membership of CPTPP and accession in December 2024 has begun to provide some benefits, including the UK's first FTAs with Malaysia and Brunei.
- Total food and drink exports to CPTPP members reached £2.1bn, a modest decline of 1.4% in value year-on-year. This is down to a decline in exports of alcoholic and non-alcoholic drinks. Food export volumes grew by 7.8%.
- Imports of food from CPTPP were at a record high of £4.1bn in 2025, climbing by 25.4% in volume, reflecting supply chain diversification and the increasing importance of these trade partners.
- Performance across CPTPP was mixed, with food and drink imports up with all but two members, and strong export increases in Canada and New Zealand, with declines to Japan and Singapore.
- CPTPP will deliver tariff benefits in Mexico. Ice cream tariffs - previously at 20% +\$0.36/kg - will be eliminated to zero. Mexico was a highlight for exports in 2025, growing 26.2% to £148.4m, with imports up 21.1% to £153.9m
- The CPTPP expansion pipeline offers more opportunities for the UK. Uruguay, a prospective member where high tariffs constrain food and non-alcoholic exports, is a key opportunity. CPTPP already facilitates trade with markets covering around 15% of global GDP, a share set to grow over the coming years.
- FDEA:** The Philippines, a prospective member, offers strong potential driven by growing urban demand for quality imported food and drink.

Data Sources: His Majesty's Customs & Excise

## CPTPP FOOD AND DRINK TRADE

CPTPP Total		Australia		Brunei	
Export	Import	Export	Import	Export	Import
£2.1bn	£4.1bn	£419.9m	£553.4m	£2.9m	£0.0m
-1.4%	18.8%	-2.2%	28.7%	6.2%	-9.5%

Canada		Chile		Japan	
Export	Import	Export	Import	Export	Import
£430.2m	£760.6m	£82.3m	£406.4m	£311.9m	£96.3m
7.1%	14.6%	3.9%	-0.4%	-14.0%	35.2%

Malaysia		Mexico		New Zealand	
Export	Import	Export	Import	Export	Import
£72.4m	£149.6m	£148.4m	£153.9m	£52.8m	£711.7m
-2.1%	18.1%	26.2%	21.1%	5.2%	26.4%

Peru		Singapore		Vietnam	
Export	Import	Export	Import	Export	Import
£27.9m	£482.0m	£444.9m	£63.2m	£77.5m	£701.5m
-13.4%	15.7%	-6.6%	10.3%	3.8%	23.2%

## MEXICO EXPORT TARIFF CHANGES

	Export Value 2025	Tariff under bilateral	Tariff under CPTPP
Malt extracts	£3.6m	10% +\$0.36/kg	1% (2026), 0% (2027) + \$0.03/kg of sugar
Roasted coffee	£1.8m	45%	36%
Ice cream	£1.1m	20% +\$0.36/kg	0%

## VOLUMES TRADED WITH CPTPP

Unit of measurement	Exports 2025	Change 2024 - 2025	Imports 2025	Change 2024 - 2025
Kilograms (KG)	367.6m	7.8%	2.9bn	25.4%
Litres (L)	57.6m	-9.0%	357.5m	-5.8%
Litres of pure alcohol (LPA)	59.5m	-11.7%	2.8m	22.5%

## CPTPP PROSPECTIVE MEMBERS

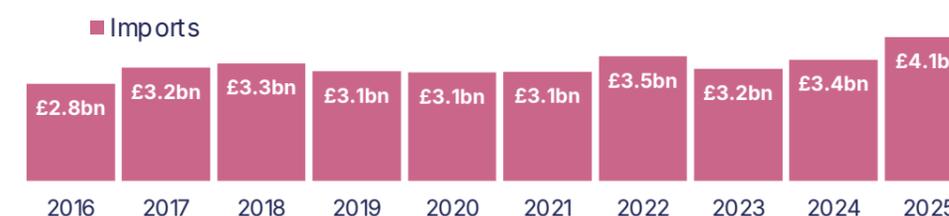
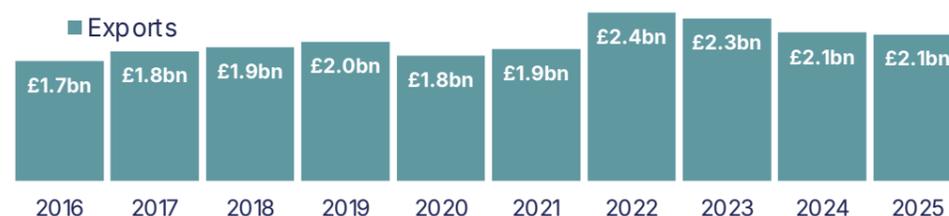
	Top export products		Top import products	
Uruguay	Whisky	£38.7m	Oilseeds	£50.9m
	Gin	£1.8m	Beef	£35.6m
	Spirits	£1.5m	Rice	£18.9m
	Cocoa	£0.4m	Fish	£1.6m
	Vodka	£0.4m	Fruits	£1.1m

	Top export products		Top import products	
Philippines	Pork	£24.5m	Juices	£26.3m
	Eggs	£9.0m	Fish	£23.5m
	Milk	£6.4m	Fruit & nuts	£20.4m
	Whisky	£6.2m	Fruits	£15.9m
	Chocolate	£3.0m	Savoury snacks	£2.9m

## MEXICO IMPORT TARIFF CHANGES

	Import Value 2025	Tariff under bilateral	Tariff under CPTPP
Asparagus	£6.5m	0% up to 600t	0%
Natural honey	£6.2m	16%	0%
Fresh bananas	£0.0m	£58/1000kg up to 12,000t, £95/1000kg outside	£62/1000kg

## FOOD & DRINK TRADE WITH CPTPP



## INDONESIA

- Indonesia emerged in 2025 as one of the growth stories in UK food and drink trade, recording the 4<sup>th</sup> fastest export growth of major markets, with exports reaching £40.5m in 2025, a 52.0% increase in value. This growth was volume driven with a 49.9% increase in food exports.
- The standout export performer was milk and cream, which grew an extraordinary 494% in value and 490% in volume to £13.1m. Potatoes, breakfast cereals and oats all showed strong growth too.
- Indonesia's graduation from the UK's Developing Countries Trading Scheme (DCTS) in 2027 is on the horizon. Under DCTS, a range of Indonesian food and drink exports to the UK currently benefit from preferential tariff rates.
- When Indonesia graduates to Most Favoured Nation (MFN) status, these preferences will expire, with notable increases across key categories: tuna tariffs will rise from 16.5% to 20%, and shrimp from 4.2% to 12. Government needs to communicate and ensure businesses can plan for this transition.
- [The UK-Indonesia Economic Growth Partnership](#) signed in January 2026 formally commits the UK to share its CPTPP accession with Indonesia, who applied to join CPTPP in 2024. Indonesia accession to CPTPP would provide a significant market access opportunity.
- FDEA:** Retailers like Ranch Market or The Foodhall stock premium imported goods for urban upper middle consumers seeking quality, sustainable innovation.

Data Sources: His Majesty's Customs & Excise

### KEY INDICATORS

	2025	2024	Change 2024 - 25
Exports	£40.5m	£26.7m	52.0%
Imports	£210.4m	£192.7m	9.2%
Trade Balance	-£169.9m	-£166.0m	-2.3%

### TOP TEN EXPORTS

	2025	Value change 2024 - 25	Volume change 2024 - 25	Tariff rate
Milk & cream	£13.1m	493.7%	490.0%	5%
Cocoa	£6.8m	N/A	N/A	5%
Potatoes	£4.1m	140.7%	113.5%	0%
Cheese	£1.5m	32.1%	38.3%	5%
Cereal flours	£1.4m	14869.9%	22440.2%	5%
Breakfast cereals	£1.0m	64.3%	100.8%	10%
Oats	£1.0m	88.4%	102.8%	5%
Malt extracts	£0.9m	-33.2%	-38.0%	5%
Chocolate	£0.9m	-3.2%	-15.3%	5 - 20%
Savoury snacks	£0.6m	30.3%	1.5%	20%

#### Indonesia applied to join CPTPP in 2024.

The UK-Indonesia Economic Growth Partnership signed in January 2026 says the UK will continue to share its CPTPP accession experience with Indonesia.



#### Potential upsides for UK food & drink if Indonesia joins CPTPP:

- Better access to Indonesia under a shared CPTPP trade framework.
- Lower trade friction through more consistent rules and less paperwork.
- More flexible regional sourcing and supply chain options across CPTPP markets.

### VOLUMES TRADED WITH INDONESIA

Unit of measurement	Exports 2025	Change 2024 - 2025	Imports 2025	Change 2024 - 2025
Kilograms (KG)	25.5m	49.9%	385.4m	-3.0%
Litres (L)	0.1m	-77.8%	0.0m	-55.6%
Litres of pure alcohol (LPA)	0.1m	105.3%	N/A	N/A

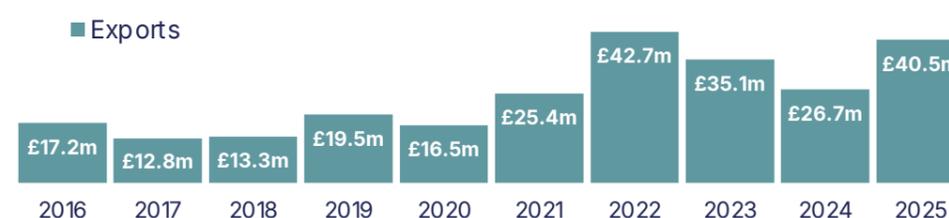
### TOP TEN IMPORTS

	2025	Value change 2024 - 25	Volume change 2024 - 25	Tariff rate
Coffee	£52.0m	185.2%	217.1%	0%
Vegetable oils	£23.8m	-35.0%	N/A	10%
Shellfish	£17.6m	-18.7%	-29.0%	10 - 20%
Fish	£17.5m	-7.0%	-2.1%	8 - 20%
Fruits	£10.3m	94.9%	26.9%	0 - 18%
Molasses	£8.5m	3280.1%	9802.4%	0%
Prepared pineapple	£7.5m	0.8%	N/A	16 - 18%
Spices	£4.5m	9.7%	15.6%	0%
Savoury snacks	£3.1m	41.5%	55.4%	8%
Juices	£3.0m	6.9%	-20.5%	16%

### TARIFF CHANGES FOLLOWING DCTS GRADUATION

	Import Value 2025	Tariff under DCTS	MFN Tariff (from 2027)
Tuna	£8.5m	16.5%	20%
Pineapple	£6.0m	14.5%	18%
Shrimp	£4.9m	4.2%	12%
Prepared shrimp	£3.6m	7%	20%
Prepared crab	£3.1m	2.8%	8%
Jelly confectionery	£1.6m	4.5%	8%

### FOOD & DRINK TRADE WITH INDONESIA





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