Trade Snapshot

Q3 2025

fdf

FDEA
Food & Drink Exporters Association

Executive summary

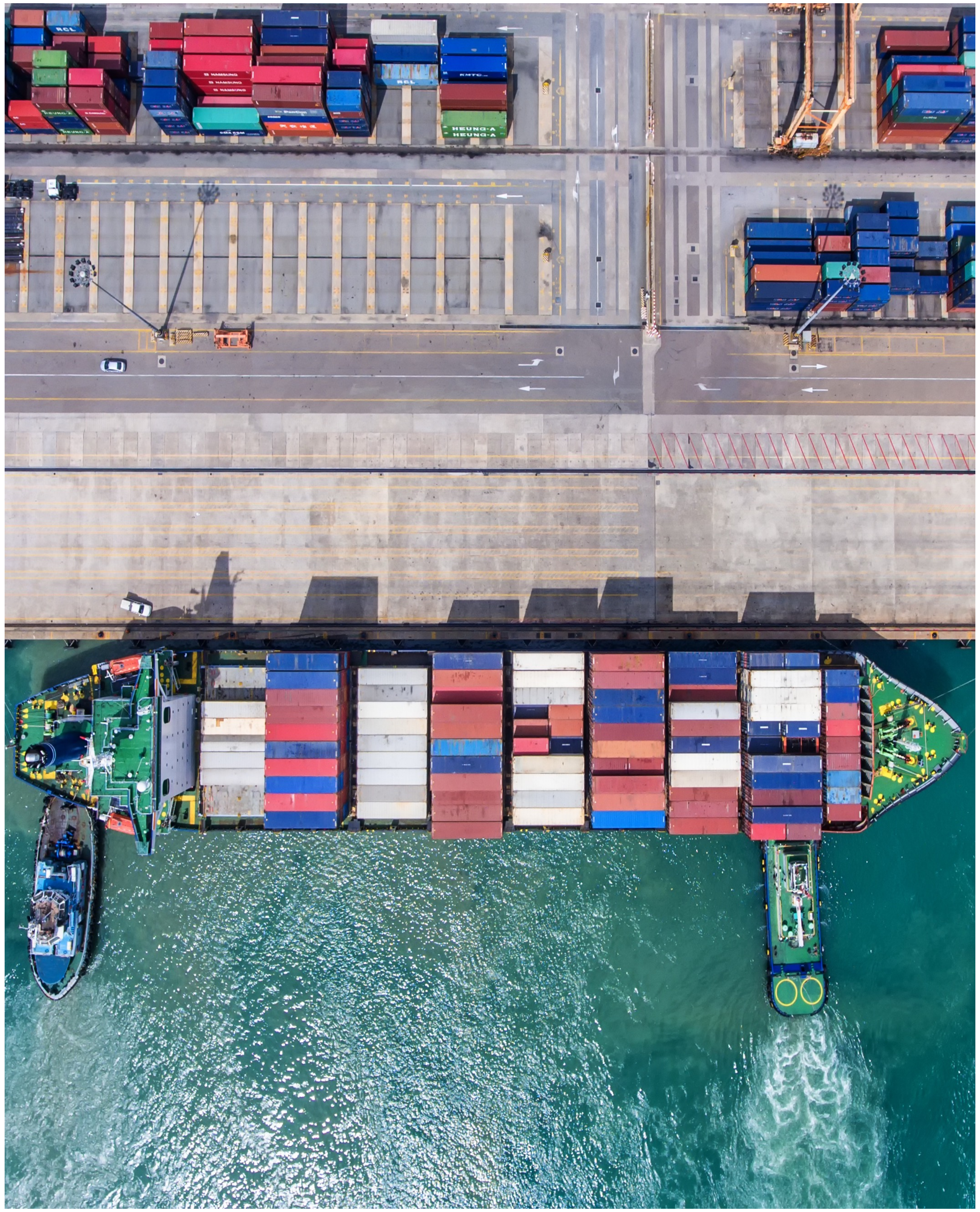
The Food and Drink Federation's (FDF) Trade Snapshot provides an overview of the UK's food and drink trade performance. It explores the key trends, challenges and opportunities in global markets. The data for the first three quarters of 2025 illustrates sustained export growth amid evolving trade dynamics.

UK food and drink exports reached £18.9bn year-to-date, up 5.8% year-on-year. Excluding alcohol, exports totalled £13.4bn. Export volumes showed a welcome recovery, with kilogram exports rising 6.9% to 6.6bn, although they remain 10.1% below 2023 levels. UK exporters continue to diversify across global markets with non-EU exports growing 6.2% and EU exports rising 5.5%. The top export destinations remain Ireland, France and the USA.

Imports of food and drink reached £49.6bn (+6.6% year-on-year). Non–EU imports drove this growth, with volumes climbing 17.1% in the past year. Brazil, Canada and China led this growth, reflecting expanding supply chain networks. As UK-EU SPS negotiations progress, BTOM easements that have facilitated non-EU imports will expire as the UK reverts to EU border controls, requiring clear government communication to minimise supply chain disruption.

The UK-EU negotiations on a Common Sanitary and Phytosanitary (SPS) Area provide an opportunity to amplify gains in EU trade by reducing certification and inspection burdens, particularly for short shelf-life goods and mixed consignments. There are positive signs of recovery for EU exports, with volumes to the EU rising 5.1% to 5.0bn kg, though food export volumes remain 23.4% below 2016-2020 averages. Early and transparent communication on the SPS framework will allow companies to assess implications and plan for compliance.

There continue to be opportunities for food and drink through free trade agreements (FTA). The recent announcement on the updated UK-South Korea FTA, and the ongoing negotiations with the Gulf Cooperation Council (GCC) are opportunities to increase preferential access and reduce technical barriers to trade. A comprehensive GCC agreement should target cutting costs through harmonised certification and tariff reductions on key exports such as breakfast cereals, oats and chocolate, helping the UK close the market share gap with EU competitors. Meanwhile, an updated South Korea FTA will allow more flexible sourcing of ingredients through generous rules of origin products specific rules.



EXPORTS

- Food and drink exports sustained an upward trajectory in Q3, totalling £18.9bn so far in 2025, an increase of 5.8% year-on-year. Food and non-alcoholic drink exports reached £13.4bn.
- Export volumes are continuing their welcome recovery, with kilogram exports up 6.9% to 6.6bn kg year-to-date and litre exports up 7.7% compared to 2023. However, food export volumes remain 10.1% below 2023 levels, with the sector yet to return to pre-2019 performance.
- Key products that are showing robust demand include salmon (+26.4%), breakfast cereals (+21.3%), and lamb & mutton (13.5%).
- The FDF Ambition for Growth outlines our target to grow exports to £35bn over the next decade. Government partnership can help achieve this by developing a comprehensive SME export plan alongside the UK-EU SPS framework, simplifying compliance and building business confidence.
- With £54.2m in year-to-date oat exports across 92 markets, The UK are the world's ninth largest oat exporter.
- Government could look to partner with industry to fund a £2.6m joint industry-government export promotion programme, matching the support offered in devolved nations, to ensure trade deal utilisation and export growth.
- UKEF's Small Export Builder scheme provides government-backed insurance and credit growth for smaller exporters, enabling them to compete and grow in markets they couldn't otherwise access.

Data Sources: His Majesty's Customs & Excise

KEY INDICATORS

	YTD 2025	YTD 2024	Change 2024 - 25
Food & non-alcoholic drink	£13.4bn	£12.4bn	8.0%
All food & drink	£18.9bn	£17.9bn	5.8%
EU	£10.9bn	£10.3bn	5.5%
Non-EU	£8.1bn	£7.6bn	6.2%
EU share	57.4%	57.5%	0.1pp
Non-EU share	42.6%	42.5%	-0.1pp

TOP TEN EXPORTS

	YTD 2025	Value change 2024 - 25	Volume change 2024 - 25
Whisky	£4.1bn	-0.4%	-5.7%
Salmon	£779.6m	12.4%	26.4%
Chocolate	£744.3m	9.4%	-7.3%
Milk and cream	£734.1m	19.4%	3.3%
Cheese	£723.5m	10.2%	0.6%
Beef	£593.0m	22.1%	-4.8%
Soft drinks	£555.3m	10.1%	N/A
Lamb and mutton	£491.1m	15.9%	13.5%
Gin	£462.0m	16.7%	1.8%
Breakfast cereals	£443.5m	-1.5%	18.1%

UK OAT EXPORTS

The UK has exported £54.2m worth of oats in the first three quarters of 2025, reaching 92 different destinations

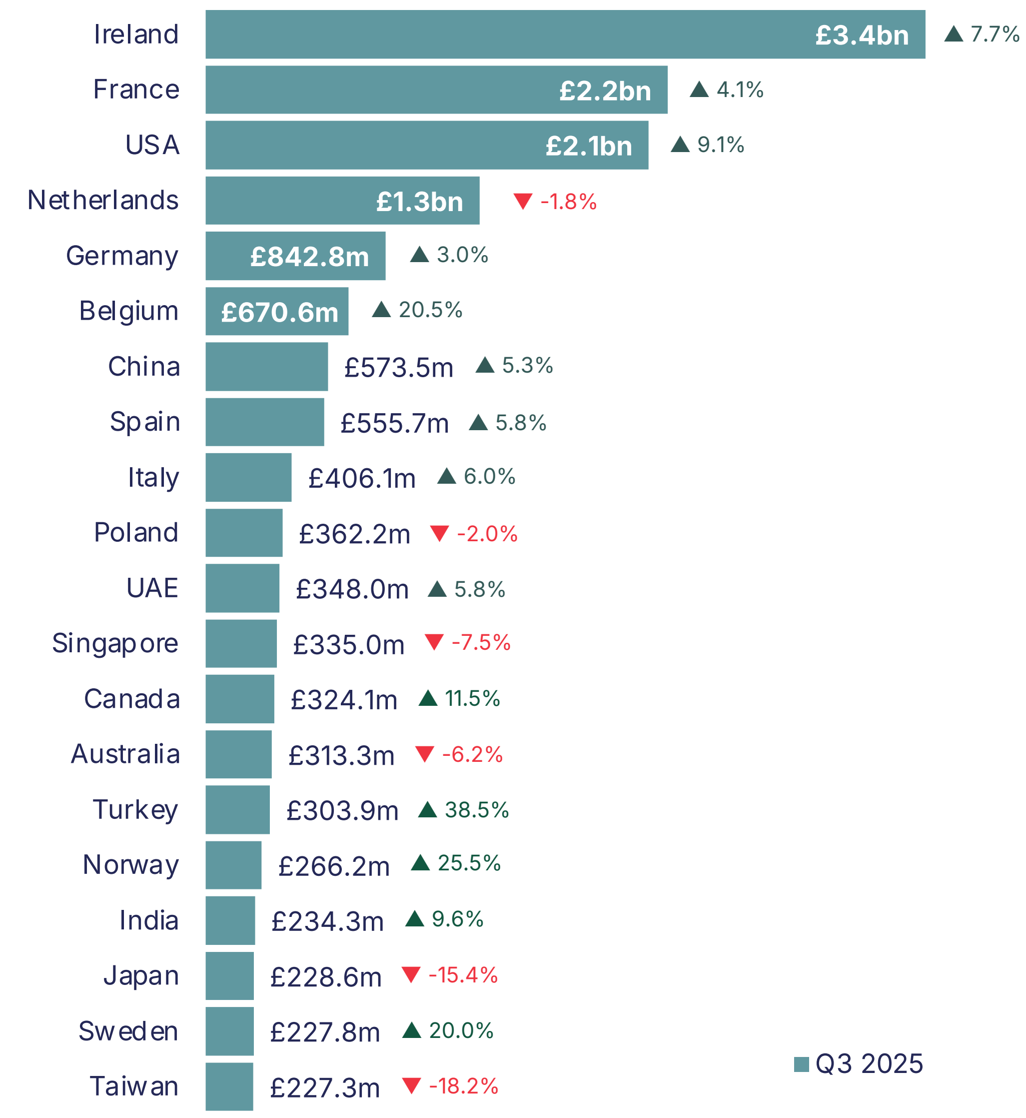
Top export destinations

Spain	£7.3m	UAE	£4.1m
Ireland	£7.3m	Israel	£2.9m
Belgium	£5.0m	Saudi Arabia	£2.6m

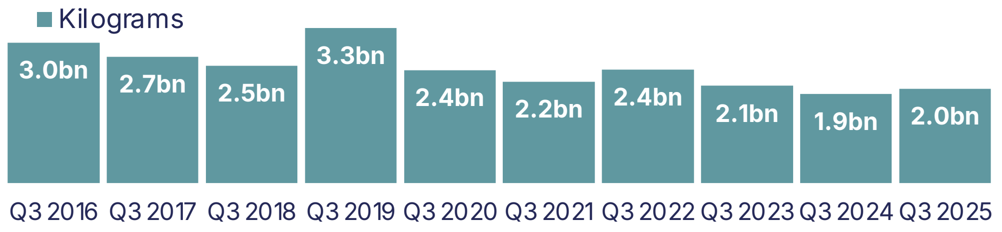
EXPORT VOLUMES

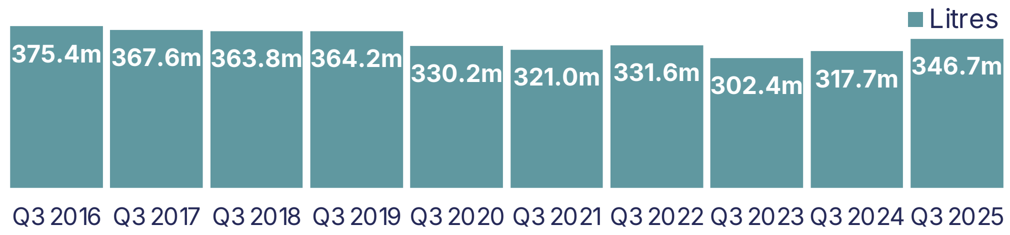
Unit of measurement	YTD 2025	Change 2023 - 2025	Change 2024 - 2025
Kilograms (KG)	6.6bn	-10.1%	6.9%
Litres (L)	936.3m	7.7%	3.6%
Litres of pure alcohol (LPA)	363.5m	-2.1%	-3.1%

TOP TWENTY MARKETS



Q3 EXPORT VOLUMES OVER TIME





IMPORTS

- Imports reached new highs, totalling £49.6bn year-to-date, up 6.6% year-on-year. This is supported by growth in beef and poultry imports, and a notable surge in non-EU imports.
- Imports of food in terms of volume increased by 3.8% to 28.9bn kg and is a substantial 15% increase since 2023.
- Brazil (+20.4%), Canada (+18.6%), and China (+12.7%) are leading the growth of Non-EU inflows, underscoring expanding supply chain networks.
- Non-EU imports are 17.1% higher year-on-year as businesses take advantage of BTOM easements. As UK-EU SPS negotiations progress, these easements will expire as the UK reverts to EU border controls. Government must communicate any upcoming changes to ensure minimal disruption to supply chains.
- Government should adopt a more proportionate approach to product sample imports from non-EU countries – independent of SPS negotiations – to unlock investment in UK food and drink R&D.
- The next round of High-Risk Food of Non-Animal Origin controls will come into effect in early 2026. This will primarily impact importers of spices from India through mandatory supplier certification and additional compliance for Northern Ireland shipments via GB.
- We welcome government plans to review import tariffs on non-sensitive ingredients and streamline the duty suspension process to lower input costs and ease inflationary pressures.

Data Sources: His Majesty's Customs & Excise

KEY INDICATORS

	YTD 2025	YTD 2024	Change 2024 - 25
Food & non-alcoholic drink	£45.8bn	£42.6bn	7.5%
All food & drink	£49.6bn	£46.5bn	6.6%
EU	£34.1bn	£32.9bn	3.5%
Non-EU	£15.5bn	£13.6bn	14.0%
EU share	68.7%	70.8%	-2.1pp
Non-EU share	31.3%	29.2%	2.1pp

TOP TEN IMPORTS

	YTD 2025	Value change 2024 - 25	Volume change 2024 - 25
Fruits	£4.3bn	10.7%	8.0%
Poultry	£2.8bn	15.3%	7.2%
Vegetables	£2.7bn	-0.5%	N/A
Wine	£2.6bn	-4.5%	-4.6%
Chocolate	£2.4bn	18.3%	-7.1%
Savoury snacks	£1.7bn	2.5%	-1.1%
Cheese	£1.7bn	9.9%	3.8%
Fish	£1.7bn	14.0%	1.1%
Soft drinks	£1.6bn	7.4%	N/A
Beef	£1.5bn	23.8%	-1.1%

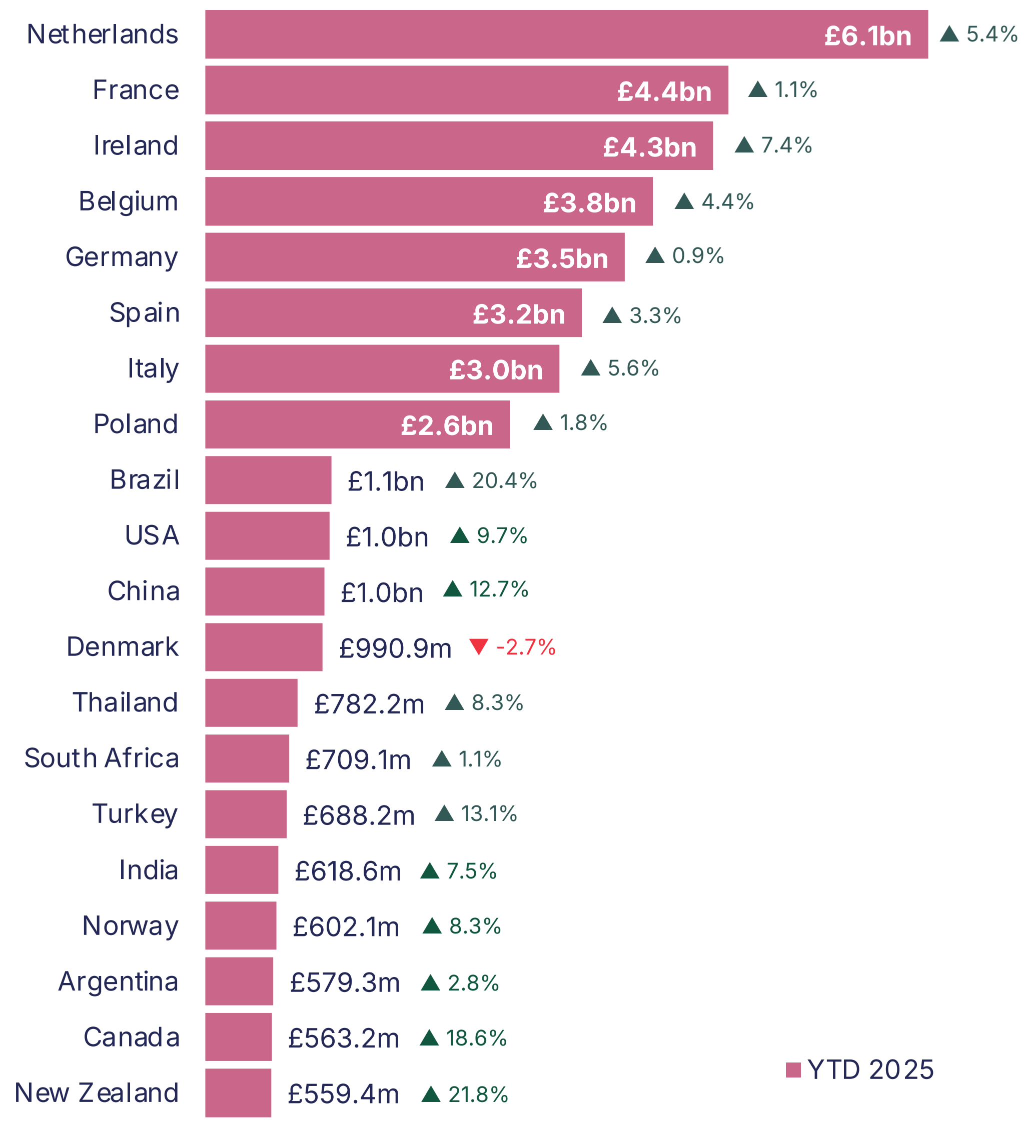
REST OF WORLD IMPORT VOLUMES

Unit of measurement	YTD 2025	Change 2023 - 2025	Change 2024 - 2025
Kilograms (KG)	12.6bn	24.7%	17.1%
Litres (L)	579.4m	-0.5%	-1.9%
Litres of pure alcohol (LPA)	14.0m	-40.0%	-49.5%

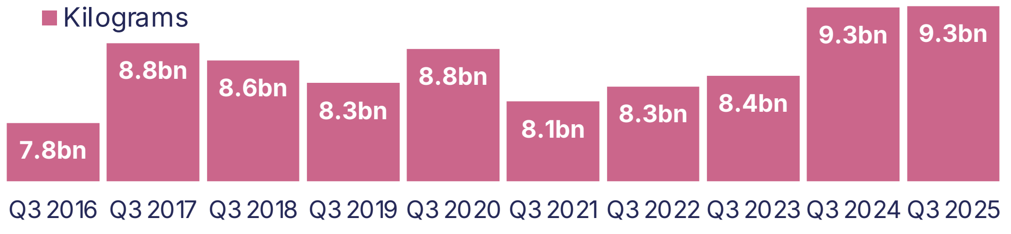
IMPORT VOLUMES

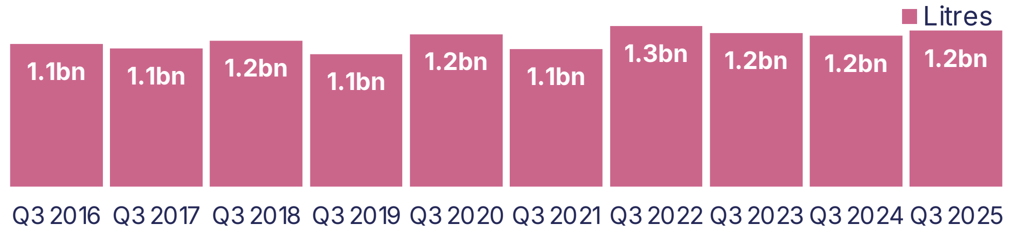
Unit of measurement	YTD 2025	Change 2023 - 2025	Change 2024 - 2025
Kilograms (KG)	28.9bn	15.0%	3.8%
Litres (L)	3.5bn	0.3%	0.5%
Litres of pure alcohol (LPA)	70.3m	-5.7%	11.7%

TOP TWENTY MARKETS



Q3 IMPORT VOLUMES OVER TIME





EUROPEAN UNION

- UK exports to the EU maintained positive momentum in the first three quarters of 2025, reaching £10.9bn, a rise of 5.5% year-on-year. This was also underpinned by a recovery in volumes, which rose 5.1% to 5.0bn kg.
- Total year-to-date food export volumes to the EU remain significantly depressed, with a 23.4% decline across 2021 – 2025 compared to 2016 – 2020. This is across every top European export destination, with Germany down 59.1% compared to the pre-Brexit baseline, the Netherlands down 22.9%, and Belgium down 39.9%.
- Access to the EU remains critical for every UK region. The UK-EU Common Understanding marks a major step forward in reducing post-Brexit trade barriers in food and drink.
- Early and transparent communication will allow companies to assess the implications, identify areas of divergence, and plan for compliance and investment.
- SPS measures remain the most trade-sensitive barrier. Alignment in veterinary and plant health systems should be the immediate priority to deliver simplification for meat, dairy, and horticulture traders.
- Where the UK intends to align with EU law, parallel risk assessments duplicate effort and slow innovation. A mechanism to fast-track the adoption of EU assessments should be developed to reduce bureaucratic delays.

Data Sources: His Majesty's Customs & Excise

European Union

Export	Import	Top Exports		Top Imports	
£10.9bn	**£34.1bn**	Whisky	£1.1bn	Chocolate	£2.2bn
		Chocolate	£535.3m	Vegetables	£2.1bn
		Beef	£530.3m	Wine	£1.9bn

Ireland

Export	Import	Top Exports		Top Imports	
£3.4bn	**£4.3bn**	Milk & cream	£330.1m	Beef	£993.3m
		Soft drinks	£251.0m	Cheese	£311.1m
		Chocolate	£214.4m	Savoury snacks	£241.5m

France

Export	Import	Top Exports		Top Imports	
£2.2bn	**£4.4bn**	Whisky	£323.7m	Wine	£840.3m
		Salmon	£289.4m	Savoury snacks	£283.7m
		Lamb & mutton	£282.5m	Chocolate	£231.6m

Netherlands

Export	Import	Top Exports		Top Imports	
£1.3bn	**£6.1bn**	Chocolate	£95.1m	Vegetables	£670.0m
		Beef	£90.9m	Poultry	£540.8m
		Cheese	£87.6m	Cocoa	£379.9m

Germany

Export	Import	Top Exports		Top Imports	
£843m	**£3.5bn**	Whisky	£128.9m	Chocolate	£450.0m
		Lamb & mutton	£78.4m	Savoury snacks	£225.0m
		Chocolate	£48.1m	Soft drinks	£197.3m

Belgium

Export	Import	Top Exports		Top Imports	
£671m	**£3.8bn**	Lamb & mutton	£69.3m	Potatoes	£437.7m
		Cocoa	£67.8m	Chocolate	£391.1m
		Whisky	£56.1m	Soft drinks	£268.5m

Spain

Export	Import	Top Exports		Top Imports	
£556m	**£3.2bn**	Whisky	£154.0m	Vegetables	£745.9m
		Shellfish	£51.3m	Fruits	£728.5m
		Cheese	£39.7m	Wine	£199.1m

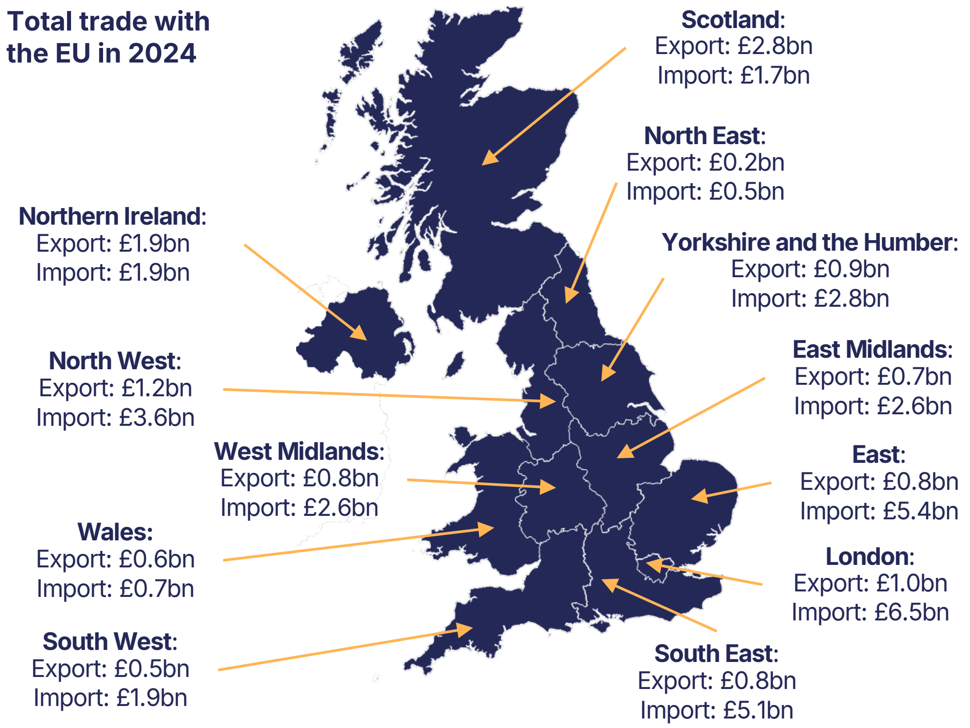
VOLUMES TRADED WITH THE EU

Unit of measurement	Exports YTD 2025	Change 2024 - 2025	Imports YTD 2025	Change 2024 - 2025
Kilograms (KG)	5.0bn	5.1%	16.3bn	-4.6%
Litres (L)	690.3m	4.0%	3.0bn	0.9%
Litres of pure alcohol (LPA)	130.9m	-8.2%	42.4m	9.7%

FOOD EXPORT VOLUMES OVER TIME

	YTD average 2021 - 2025	YTD average 2016 - 2020	Change
EU27	5.1bn kg	6.7bn kg	-23.4%
Ireland	2.3bn kg	2.5bn kg	-5.5%
Netherlands	839.7m kg	1.1bn kg	-22.9%
Spain	425.8m kg	708.7m kg	-20.7%
France	424.4m kg	535.0m kg	-15.0%
Belgium	331.7m kg	390.1m kg	-39.9%
Germany	206.7m kg	504.8m kg	-59.1%
Poland	95.1m kg	124.9m kg	-51.9%
Italy	84.4m kg	175.2m kg	-20.7%
Sweden	82.8m kg	104.4m kg	-23.9%
Denmark	80.0m kg	126.8m kg	-36.9%

ANNUAL REGIONAL FOOD AND DRINK EXPORTS



GCC

- The Gulf Cooperation Council (GCC) continues to demonstrate its value as a high-growth priority region for UK exporters. Total food and drink exports to the region reached £589.1m year-to-date, up a modest 1.1% year-to-date.
- Exports to the UAE rose 5.8% to £348.0m, representing almost 60% of exports to the GCC. Saudi exports are down 5.0% to £131.0m so far this year.
- Milk and cream exports have seen a boost, up 74.8% on the year, whilst chocolate exports fell 18.0% by value.
- While the UK accounts for 1.6% of GCC food and drink imports, it trails major EU competitors including the Netherlands (2.9%), France (2.0%), and Italy (1.8%). This highlights the benefits of securing preferential access which is vital to compete effectively and close this gap.
- While the UK is securing a comprehensive, bloc wide agreement with the entire GCC, the EU is advancing through bilateral deals with individual member states. This presents a unique opportunity for British exporters who will benefit from a more harmonised and simplified regulatory framework.
- The GCC's top source of breakfast cereal and oats is the UK. These products, as well as chocolate, sauces, ice cream and herbal infusions would benefit from tariff-free access from entry into force.
- UK exports would benefit from GCC wide certification, enabling the use of self-certification which will reduce costs and deliver much needed consistency for UK exporters.

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

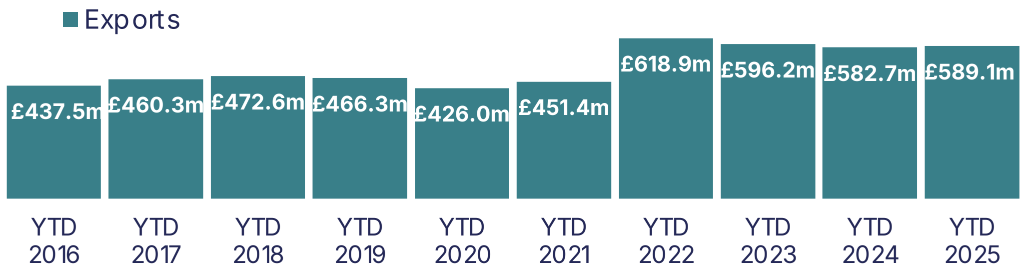
GCC FOOD AND DRINK EXPORTS

	YTD 2025	YTD 2024	Change 2024- 25
Total	£589.1m	£582.7m	1.1%
UAE	£348.0m	£329.0m	5.8%
Saudi Arabia	£131.0m	£137.8m	-5.0%
Kuwait	£40.1m	£43.7m	-8.1%
Qatar	£31.4m	£35.4m	-11.2%
Bahrain	£23.2m	£23.3m	-0.1%
Oman	£15.3m	£13.6m	12.9%

TOP FOOD AND NON-ALCOHOLIC DRINK EXPORTS

Product	Market	YTD 2025	Value change 2024 - 25	Volume change 2024 - 25
Breakfast cereals Value £60.2m Change 4.0%	UAE	£28.9m	14.7%	32.9%
	Saudi Arabia	£16.4m	-13.9%	11.9%
	Kuwait	£6.8m	12.2%	44.2%
Chocolate Value £47.3m Change -18.0%	UAE	£18.9m	0.2%	-12.5%
	Saudi Arabia	£16.8m	-31.4%	-35.1%
	Kuwait	£6.1m	-12.4%	-26.4%
Milk and cream Value £38.2m Change 74.8%	UAE	£21.5m	62.7%	93.5%
	Saudi Arabia	£11.7m	99.1%	104.9%
	Oman	£2.0m	349%	190%
Cheese Value £31.9m Change -2.9%	UAE	£15.3m	-9.6%	-3.3%
	Saudi Arabia	£9.1m	44.6%	30.9%
	Bahrain	£2.7m	-35.2%	-46.3%
Sweet biscuits Value £28.3m Change 2.7%	UAE	£12.0m	10.7%	7.3%
	Saudi Arabia	£8.0m	-15.3%	-7.5%
	Kuwait	£4.3m	7.1%	-16.0%

FOOD & DRINK EXPORTS TO THE GCC



VOLUMES TRADED WITH THE GCC

Unit of measurement	Exports YTD 2025	Change 2024 - 2025	Imports YTD 2025	Change 2024 - 2025
Kilograms (KG)	107.3m	6.3%	17.6m	-37.0%
Litres (L)	20.3m	24.0%	5.6m	-2.8%
Litres of pure alcohol (LPA)	7.5m	2.7%	0.0m	-71.1%

TRADE DEAL OPPORTUNITIES

Breakfast cereals
YTD value **£60.2m**
Tariff **(5-12%)**
Top three import markets: UK, Poland, and Spain

Chocolate
YTD value **£47.3m**
Tariff **(5-8%)**
Top three import markets: Italy, Egypt, and Netherlands

Oats
YTD value **£8.8m**
Tariff **(5%)**
Top three import markets: UK, Malaysia, and France

Sauces & condiments
YTD value **£9.8m**
Tariff **(5-12%)**
Top three import markets: Ireland, USA, and Denmark

Ice cream
YTD value **£5.3m**
Tariff **(5-15%)**
Top three import markets: USA, France, and Turkey

Herbal infusions tea
YTD value **£11.1m**
Tariff **(5-6%)**
Top three import markets: Ireland, USA, and Germany

Most GCC states require complex origin documentation with legalisation and at individual country embassies with significative administrative costs and delays for businesses. The UK should press for an outcome allowing the use of UK origin certificates.

SHARE OF TOTAL GCC FOOD AND DRINK IMPORTS

	2024 value	Share of total GCC imports
UK	£819.8m	1.6%
Netherlands	£1.6bn	2.9%
France	£1.1bn	2.0%
Italy	£944.9m	1.8%
Spain	£770.7m	1.5%
Germany	£704.0m	1.3%
Ireland	£205.8m	0.4%

SOUTH KOREA

- The UK and South Korea have announced a finalised agreement to update the existing FTA.
- During 2025, total UK food and drink exports to South Korea stood at £158.4m, a decline of 11.5% year-on-year. Imports from South Korea also dropped by 9.6% to £74.0m, narrowing the trade surplus to just over £84m.
- Despite overall trade value declines, some export categories performed strongly: soft drinks (+37.1%), butter (+34.6%), and cheese (+14.6%) all saw robust growth. Conversely, fish exports fell 28.1% and malt extracts declined 30.7% by value.
- South Korea's top food and drink exports to the UK include pasta (£33.2m), prepared fruit and nuts (£9.4m), and prepared vegetables (£5.0m), though pasta imports fell 21.5% year-on-year.
- Despite year-on-year declines in 2025, trade flows remain substantially elevated relative to pre-pandemic baselines, with imports the second-highest recorded over the past decade.
- The updated FTA will secure more flexible rules of origin product specific rules, allowing businesses to take advantage of global sourcing to access preferential tariffs.
- Trade facilitation provisions will reduce bureaucracy and reduce friction and delays at the border. The commitment for 48-hour release of food is welcomed, especially for perishable goods.

Data Sources: His Majesty's Customs & Excise

KEY INDICATORS

	YTD 2025	YTD 2024	Change 2024 - 25
Exports	£158.4m	£179.0m	-11.5%
Imports	£74.0m	£81.8m	-9.6%
Trade Balance	£84.4m	£97.2m	-13.1%

VOLUMES TRADED WITH SOUTH KOREA

Unit of measurement	Exports YTD 2025	Change 2024 - 2025	Imports YTD 2025	Change 2024 - 2025
Kilograms (KG)	15.0m	-38.7%	15.1m	-11.9%
Litres (L)	7.7m	3.5%	4.2m	-12.9%
Litres of pure alcohol (LPA)	3.1m	-14.1%	0.1m	-38.3%

TOP TEN EXPORTS

	YTD 2025	Value change 2024 - 25	Volume change 2024 - 25
Whisky	£76.8m	-18.5%	-19.1%
Shellfish	£26.8m	13.8%	-0.2%
Molluscs	£26.5m	13.3%	-1.2%
Spirits	£8.2m	19.7%	18.1%
Beer	£5.8m	-4.4%	-0.6%
Soft drinks	£2.9m	37.1%	N/A
Malt extracts	£2.4m	-30.7%	-19.5%
Butter	£2.1m	34.6%	-15.5%
Fish	£2.1m	-28.1%	-86.6%
Cheese	£1.6m	14.6%	50.4%

TOP TEN IMPORTS

	YTD 2025	Value change 2024 - 25	Volume change 2024 - 25
Pasta	£33.2m	-21.5%	-18.2%
Prepared fruit & nuts	£9.4m	13.4%	N/A
Prepared vegetables	£5.0m	-13.6%	-8.9%
Sauces & condiments	£4.6m	0.0%	N/A
Soft drinks	£4.2m	-8.4%	N/A
Breakfast cereals	£3.5m	30.9%	19.2%
Savoury snacks	£1.8m	0.1%	-8.2%
Fish	£1.8m	-3.0%	-29.5%
Malt extracts	£1.2m	-35.7%	-15.1%
Vegetable oils	£1.2m	120.9%	112.4%

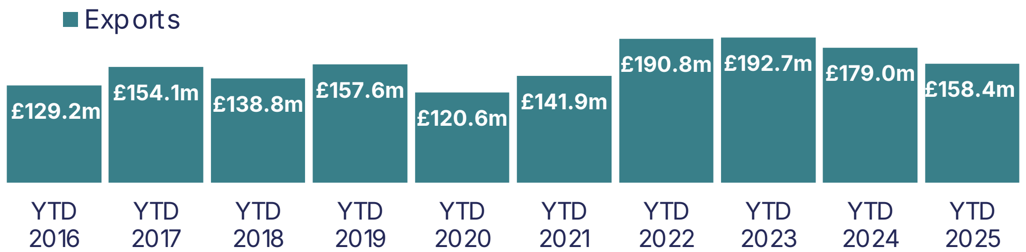
OPPORTUNITIES FROM AN UPDATED UK-SOUTH KOREA TRADE DEAL

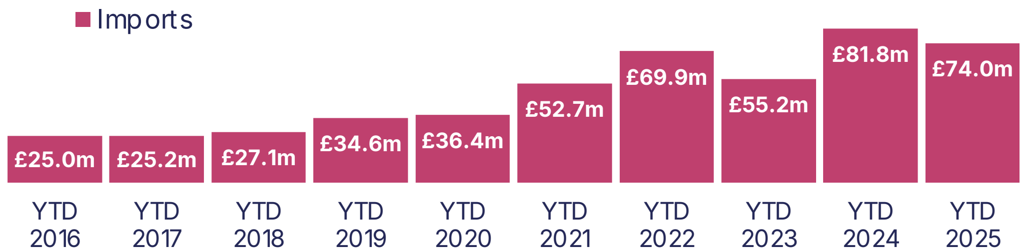
Product	YTD value	Change
Green tea	£0.0m	-69.2%
Sugar confectionery	£0.9m	262%
Prepared fruit & veg	£0.6m	-45.6%
Juices	£0.0m	919%
Prepared meat & fish	£22.5m	38.9%
Chocolate	£1.4m	-19.4%
Jams	£0.2m	-39.9%
Ice cream	£0.5m	-4.1%

The updated free trade agreement between the UK and South Korea will secure more flexible rules of origin product specific rules, with these products benefitting.

This will allow businesses to take advantage of global sourcing to access preferential tariffs.

FOOD & DRINK TRADE WITH SOUTH KOREA





fdf

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