



Powering Communities

UK FOOD & DRINK MANUFACTURING:
REGIONAL REPORT 2025

Contents

Executive Summary	3
United Kingdom	4
A complex and diverse food system	5
East of England	6
• Nomad Foods	
London	8
• Tate & Lyle	
South East	10
• Premier Foods and Mars	
South West	12
• Suntory Beverage & Food GB&I	
East Midlands	14
• Pepsico	
• Weetabix	
West Midlands	17
• Mondelēz International and Britvic	
Yorkshire and the Humber	19
• Haribo	
• Nestlé	
North East	22
• KP Snacks	
North West	24
• Pladis	
Scotland	26
• Nairn's	
Wales	28
• Kellanova	
Northern Ireland	30
Our vision for growth	31



Report prepared by
Uros Milosevic
FDF Senior Economic Analyst



Executive summary

The UK's food and drink manufacturing sector is a cornerstone of our national economy and a vital part of communities across every region of the country.

This report showcases the contribution of the economy to every region and nation of the UK, pulling together statistics and case studies which demonstrate the industry's impact.

As the UK's largest manufacturing industry, we contribute £37 billion to the economy and provide employment for nearly 500,000 people through more than 12,000 businesses. Our presence stretches from bustling cities to rural towns, creating jobs, driving investment, and delivering the products that millions of people enjoy every day.

This industry is built on quality, heritage, and innovation. From small family-run businesses to large-scale manufacturers, the sector brings together centuries of expertise to produce safe, nutritious, and affordable food and drink for every budget. Beyond the products on our shelves, it's the people and the communities behind them that make this industry so remarkable.

Our impact goes beyond domestic supply. The industry champions British products on the global stage, with exports reaching nearly £25bn in 2024, showcasing the quality and reputation of UK-made food and drink around the world.

As we look ahead, the sector faces both challenges and opportunities. To drive sustainable growth, foster innovation, and support healthier, more productive communities, we need the right strategic framework. This means ensuring that food and drink manufacturing is recognised as an advanced manufacturing sector within the UK's industrial strategy. It also calls for a food strategy that reduces unnecessary regulatory burdens while enabling businesses to invest in sustainability, healthier product portfolios, highly skilled workforces and innovative factories.

By working in partnership with government, we can unlock the full potential of the UK's largest manufacturing sector.

Food and drink manufacturing contributes **£37bn** to the UK economy

24.2% of total UK manufacturing turnover

12,195 food & drink manufacturers

Supply chain worth **£155bn** to the UK economy

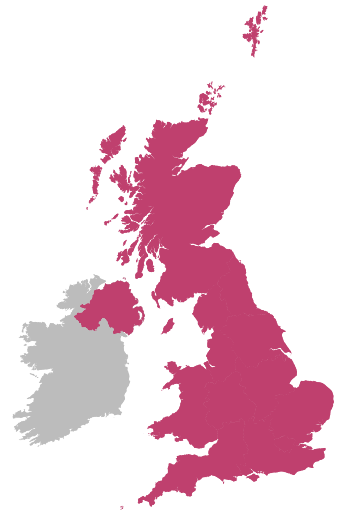
Supply chain employs **4.2 million** workers across the UK

£24.5bn of food & drink exports

UK

Food and drink is the UK's biggest manufacturing sector

GVA	£37.3bn	+2.3%
Employment	486,500	+1.9%
Businesses	12,195	-2.6%
Exports	£24.5bn	+0.4%



Source: ONS
 All figures use the latest available data
 2024: Business, GVA, Employment, Exports
 2023: Sectoral Employment

The UK delivers:
17.1% of total UK manufacturing GVA
24.2% of total UK manufacturing turnover

Top sectors by Gross Value Added:
 Other foods **£8.3bn**
 Meat **£5.7bn**
 Bread & pastry **£5.1bn**

GVA* grew **17.9%** since 2015

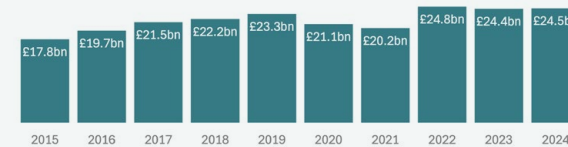


*Gross value added in chained volume measures

Top markets by value

Beverages	£8,195.4m	United States £1593.6m	France £548.2m	Ireland £503.4m
	-3.4%			
Cereals	£2,406.2m	Ireland £799.8m	Netherlands £176.2m	France £158.7m
	-13.0%			
Dairy	£2,122.7m	Ireland £654.1m	Netherlands £237.2m	France £158.5m
	+1.9%			

Export values over the years

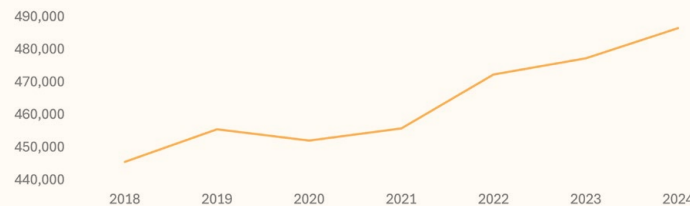


£24.5bn of exports
6.0% of total UK exports

UK food & drink **manufacturing** makes up:
18.8% of total manufacturing employment
1.3% of total employment

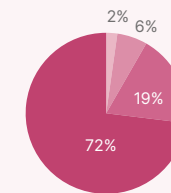
Top sectors by employment:
 Bread & pastry **106,697**
 Meat **82,853**
 Other foods **38,658**
 Prepared meals **29,599**
 Beer **21,059**

We added **41,000** jobs since 2018

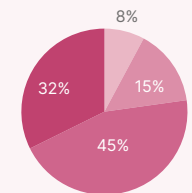


Top sectors by # of businesses:
 Bread & pastry **2,910**
 Beer **1,315**
 Other foods **1,260**
 Meat **995**
 Spirits **920**

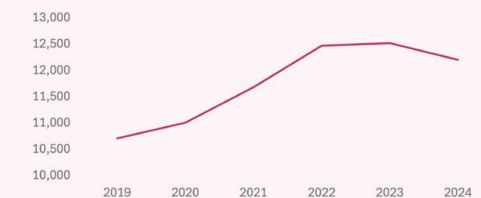
% of businesses by employment:



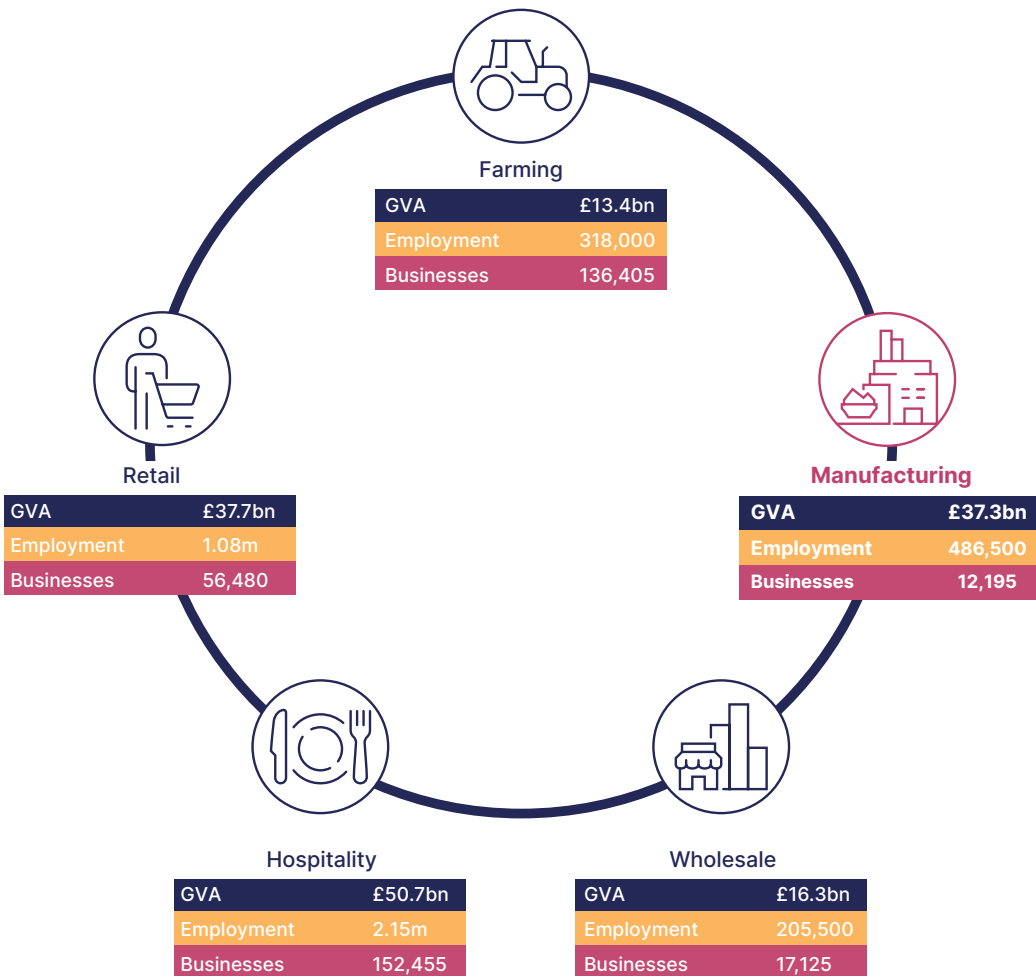
% of businesses by turnover:



Number of businesses grew 14.0% between 2019 and 2024



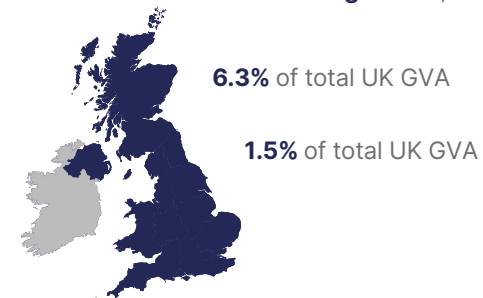
A complex and diverse food system



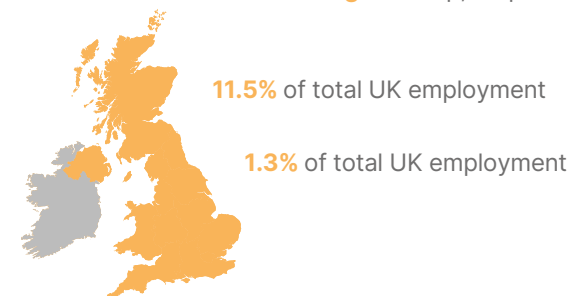
The UK's food and drink manufacturers are at the heart of a food and drink supply chain worth **£155bn** to the economy and employs almost **4.2 million** people.

GVA	£155.4bn
Employment	4,233,000
Businesses	374,660
Exports	£24.5bn
Imports	£63.1bn

In the United Kingdom, the agri-food **supply chain** & food and drink **manufacturing** deliver, respectively:



In the United Kingdom, the agri-food **supply chain** & food and drink **manufacturing** make up, respectively:



Data Sources: HMRC, ONS. Supply chain data is for 2023 and 2024.

East of England

GVA	£2.6bn +3.3%
Employment	41,000 +10.8%
Businesses	975 -2.5%
Exports	£1.2bn -7.8%

F&D manufacturing accounts for

13.3% of total manufacturing GVA
22.9% of total manufacturing turnover

The region delivers:

7.3% of total F&D manufacturing GVA
9.6% of total F&D manufacturing turnover

GVA* grew **13.8%** since 2012

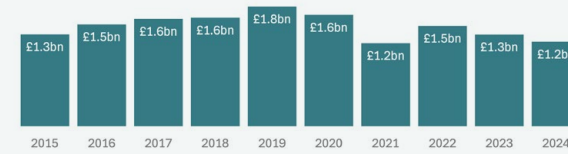


*Real GVA, index, 2019 = 100

Top markets by value

Category	Value	Change	Market 1	Market 2	Market 3
Cereals	£276.6m	-23.0%	Ireland	Netherlands	Germany
			£73.7m	£27.9m	£24.3m
			Fruit & veg	£179.0m	0.0%
			£47.0m	£19.4m	£13.1m
Coffee & tea	£141.1m	+6.6%	Ireland	Netherlands	France
			£23.1m	£11.0m	£10.9m

Export values over the years



£1.2bn of exports
5.3% of total F&D exports



Food & drink manufacturing makes up:

19.5% of total manufacturing employment
1.4% of total employment

Top sectors by employment:

Meat	11,000
Bread & pastry	6,000
Fruit & veg juices	3,500
Prepared meals	2,000
Beer	2,000

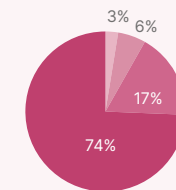
We added **6,500** jobs since 2017



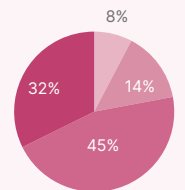
Top sectors by # of businesses:

Bread & pastry	230
Beer	105
Meat	85
Other foods	80
Spirits	55

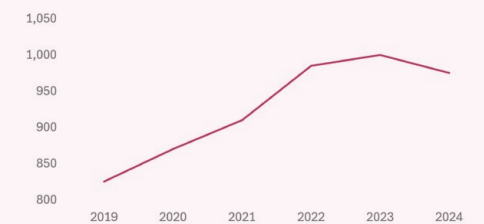
% of businesses by employment:



% of businesses by turnover:



Number of businesses grew **18.2%** between 2019 and 2024



All figures use the latest available data
2024: Business, Exports
2023: Employment
2022: GVA

East of England

With a £2.6bn GVA, the East of England is a leader in sugar, malt, poultry, and cider production. Major businesses such as British Sugar, Colman's, and Greene King drive economic growth, while Nomad Foods' Lowestoft site stands as the area's largest private employer, specialising in frozen foods.

Local specialities like Suffolk cider and Norfolk black turkey highlight the region's deep-rooted food heritage, reinforcing its long-standing role in the UK's food and drink industry.

Nomad Foods



Established in 1949, Nomad's Lowestoft factory is the largest private sector employer in the area with 800 colleagues and an apprenticeship programme in partnership with a local college.

The factory, spanning more than 25 acres, manufactures 250 products across a range of food categories including fish, chicken, potato, vegetable and plant-based products. 10% of production is currently exported.

The site has seen a huge amount of investment, particularly in terms of sustainability. The site runs on renewable electricity and investments in water treatment, low energy lighting and waste segregation have driven a double-digit reduction in carbon emissions at the site. The recycled content used for secondary packaging has been increased, and Nomad have conducted a site energy efficiency study to examine opportunities to supplement the green electricity with solar and/or wind power.

Investment has also been made on product creation and production innovation. These include Chunky Fish Fingers and Green Cuisine 'Chicken less' products. In the last few years, Nomad have invested over £12m on a new poultry line.

London

GVA	£3.2bn	+1.1%
Employment	34,000	-8.1%
Businesses	1,990	-1.5%
Exports	£2.8bn	-1.2%



All figures use the latest available data
 2024: Business, Exports
 2023: Employment
 2022: GVA

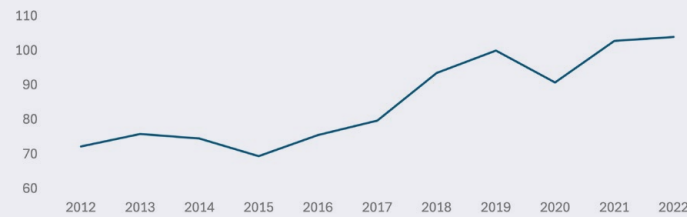
F&D manufacturing accounts for

31.8% of total manufacturing GVA
36.2% of total manufacturing turnover

The region delivers:

9.0% of total F&D manufacturing GVA
10.3% of total F&D manufacturing turnover

GVA* grew **43.9%** since 2012

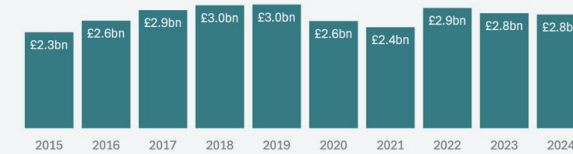


*Real GVA, index, 2019 = 100

Top markets by value

Category	Value	Change	Country	Value	Country	Value	Country		
Beverages	£1608.0m	-7.2%	United States	£358.2m	France	£86.1m	Singapore	£83.4m	
	Cereals	£204.0m	-5.4%	Ireland	£41.9m	France	£24.0m	UAE	£22.5m
				Coffee & tea	£110.5m	+4.0%	Ireland	£14.8m	Netherlands

Export values over the years



£2.8bn of exports
11.3% of total F&D exports

Food & drink manufacturing makes up:

28.6% of total manufacturing employment
0.6% of total employment

Top sectors by employment:

Bread & pastry	8,000
Prepared meals	6,000
Other foods	3,500
Soft drinks	3,500
Fruit & veg juices	2,250

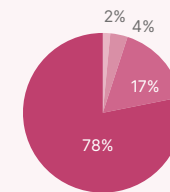
We added **2,000** jobs since 2017



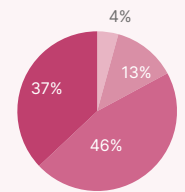
Top sectors by # of businesses:

Bread & pastry	530
Other foods	320
Beer	125
Spirits	110
Soft drinks & bottled water	110

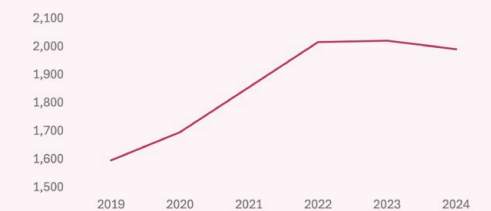
% of businesses by employment:



% of businesses by turnover:



Number of businesses grew **24.8%** between 2019 and 2024



London

London's food sector, valued at £3.2bn, is the city's largest manufacturing industry, balancing tradition with cutting edge innovation. The sector includes historic brands like Tate & Lyle Sugars, refining cane sugar since 1878, alongside a dynamic startup ecosystem fostering sustainable food solutions.

From pie and mash to salt beef bagels, London's diverse culinary history continues to shape its thriving food scene.

TATE & LYLE SUGARS



Tate & Lyle Sugars produces over 650 different products, including Lyle's Golden Syrup – an iconic British staple and the world's oldest, unchanged brand.

Their products are sold to consumers globally, specialising in unique cane sugars and syrups. Tate & Lyle Sugars has been refining cane sugar at their Silvertown site in East London since 1878. With a commitment to building economic and social wealth in the community, they employ 850 people in skilled roles and are an accredited London Living Wage Employer.

Tate & Lyle Sugars are on a journey to becoming the most ethical and sustainable cane sugar refiner in the world, with a particular focus on ethical supply chains, decarbonisation, and circularity.

The sustainable sourcing of their raw material, raw cane sugar, is of utmost importance to the company and they aim to only purchase raw sugar from suppliers who are independently certified against internationally recognised sustainability standards. Creating innovative and recyclable packaging is also an essential goal, currently 94% of Tate & Lyle Sugars' consumer packaging is already recyclable but they are now working towards ensuring that 100% of packaging found in customers' homes will be recyclable by 2025. Finally, with further investment planned for decarbonisation, their aim is to be carbon neutral by 2040, reaching net zero by 2050. To do this, Tate & Lyle Sugars are now exploring and investing in new technologies to help the refinery decarbonise, including carbon capture as well as fuel-switching to renewables like hydrogen.

South East

GVA	£3.9bn	-0.6%
Employment	27,500	-16.7%
Businesses	1,390	-2.5%
Exports	£1.2bn	-8.3%



All figures use the latest available data
 2024: Business, Exports
 2023: Employment
 2022: GVA

F&D manufacturing accounts for

15.0% of total manufacturing GVA
8.1% of total manufacturing turnover

The region delivers:

10.9% of total F&D manufacturing GVA
5.2% of total F&D manufacturing turnover

GVA* grew **79.1%** since 2012

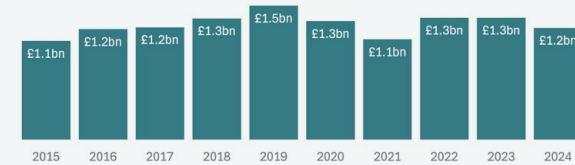


*Real GVA, index, 2019 = 100

Top markets by value

Coffee & tea	£276.0m	-8.8%	Ireland £71.3m	Netherlands £59.0m	Germany £24.9m
Cereals	£208.4m	-21.9%	Ireland £48.6m	Belgium £31.7m	Netherlands £21.2m
Beverages	£175.6m	-7.6%	United States £23.3m	Netherlands £16.1m	France £11.1m

Export values over the years



£1.2bn of exports
5.1% of total F&D exports

Food & drink manufacturing makes up:

10.5% of total manufacturing employment
0.6% of total employment

Top sectors by employment:

Bread & pastry	7,000
Fruit & veg juices	3,000
Other foods	2,500
Chocolate	2,250
Meat	2,150

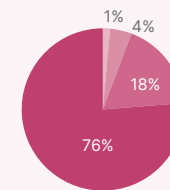
We added **5,500** jobs since 2020



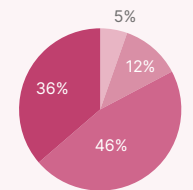
Top sectors by # of businesses:

Bread & pastry	335
Beer	195
Other foods	145
Spirits	100
Meat	80

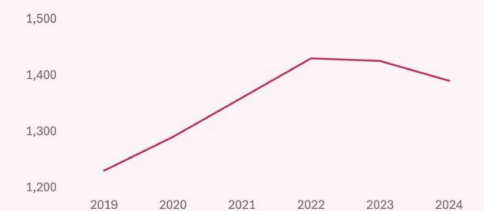
% of businesses by employment:



% of businesses by turnover:



Number of businesses grew **13.0%** between 2019 and 2024



South East

Generating £3.9bn in GVA, the South East leads in beverages, bakery, and premium foods.

The region supports a rich culinary landscape. Kentish ale, Sussex Pond Pudding, and artisan cheeses are local favourites, while Ashford's Premier Foods site drives innovation by reformulating classic brands like Batchelors soups and Bisto gravies to meet modern consumer demands.



Premier Foods' Ashford site employs around 400 people, operating 18 production lines and producing over 300 different products, including Angel Delight, Batchelors, Bird's, Bisto, Smash, Marvel, Mr Kipling cake mixes, and Paxo.

Since acquiring the site in 2006, Premier Foods has invested significantly in automation, including automated case packers and palletisers, to enhance efficiency.

Premier Foods operates 13 manufacturing and office sites across the UK and plans to approximately double capital investment in its supply chain compared to two years ago, with Ashford among the sites benefiting. For 2024/25 it is forecast to be between £40-£45m for the business overall, up from £33m invested in 2023/24.

The site also plays a role in product innovation, including the development of non-HFSS recipes and products for our foodservice arm, used by chefs and caterers across the industry - from schools, hospitals, and care homes to pubs, restaurants, and cafés.

South West

GVA	£2.5bn	+5.0%
Employment	32,000	0.0%
Businesses	1,195	-3.2%
Exports	£0.8bn	-11.0%

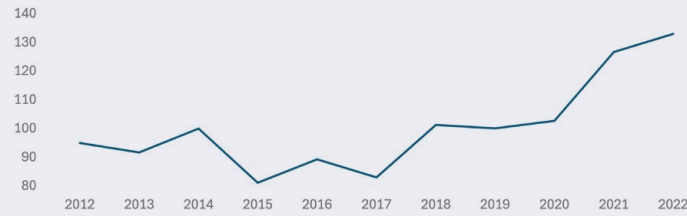


All figures use the latest available data
 2024: Business, Exports
 2023: Employment
 2022: GVA

F&D manufacturing accounts for
14.3% of total manufacturing GVA
19.6% of total manufacturing turnover

The region delivers:
7.1% of total F&D manufacturing GVA
7.0% of total F&D manufacturing turnover

GVA* grew **40.0%** since 2012

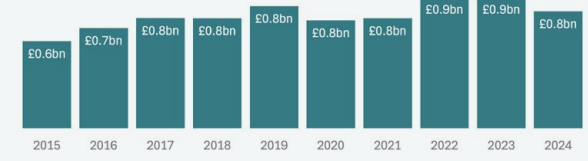


*Real GVA, index, 2019 = 100

Top markets by value

Category	Value	Change	Country	Value	Country	Value	
Dairy	£216.3m	-7.3%	United States	£60.4m	France	£26.7m	
	Fish	£116.1m	-23.3%	France	£59.0m	Spain	£10.0m
		Meat	£110.9m	-5.9%	France	£35.3m	Ireland
				Netherlands	£24.5m	Italy	£8.6m
			China	£15.2m			

Export values over the years



£0.8bn of exports

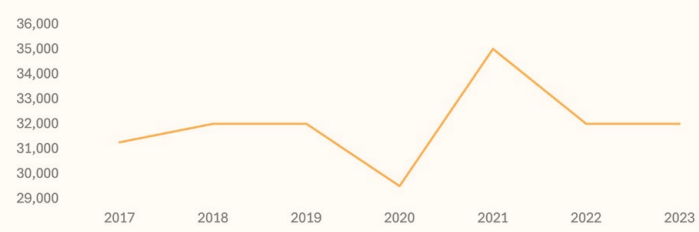
3.3% of total F&D exports

Food & drink **manufacturing** makes up:
15.2% of total manufacturing employment
1.2% of total employment

Top sectors by **employment:**

Bread & pastry	5,000
Meat	4,750
Other foods	2,500
Milk & cream	2,250
Beer	2,000

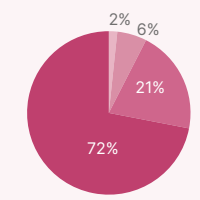
We added **750** jobs since 2017



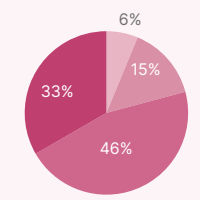
Top sectors by **# of businesses:**

Bread & pastry	230
Beer	150
Spirits	110
Other foods	105
Meat	85

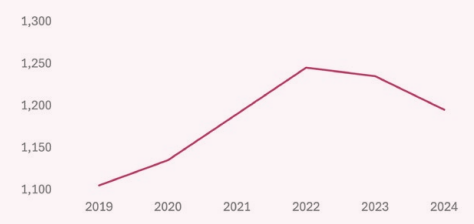
% of businesses by **employment:**



% of businesses by **turnover:**



Number of businesses grew **8.1%** between 2019 and 2024



South West

With a £2.5bn GVA, the South West is known for dairy, cider, and seafood. Coleford is home to Suntory Beverage and Food GB&I's factory which produces 800 million soft drinks annually.

The area is famed for iconic products such as Cornish pasties Cheddar cheese and scones, reflecting the region's historical contributions to the UK's food and drink sector.

SUNTORY
BEVERAGE & FOOD GB&I



Its Coleford factory in the Forest of Dean employs over 300 people and produces around 800 million drinks annually. It's at this site that SBF GB&I has produced its famous Lucozade and Ribena soft drinks brands for generations – all of which are now non-HFSS.

The site operates with 100% renewable purchased energy, has two boreholes to minimise local resource use, and sends zero waste to landfill. Since 2015, SBF GB&I has cut its carbon footprint by over 25%, aiming for a 50% reduction by 2030 and net zero across Scope 1, 2, and 3 by 2050.

In 2024, SBF GB&I announced a £6 million investment to reduce the factory's reliance on natural gas, securing its future as a key manufacturing hub site and employer in the region. A new energy model will upgrade the factory's power connection from 11kV to 33kV, increasing its access to electricity from renewable sources.

East Midlands

GVA	£4.2bn +2.6%
Employment	57,250 -2.1%
Businesses	745 -4.5%
Exports	£0.9bn -12.4%



All figures use the latest available data
 2024: Business, Exports
 2023: Employment
 2022: GVA

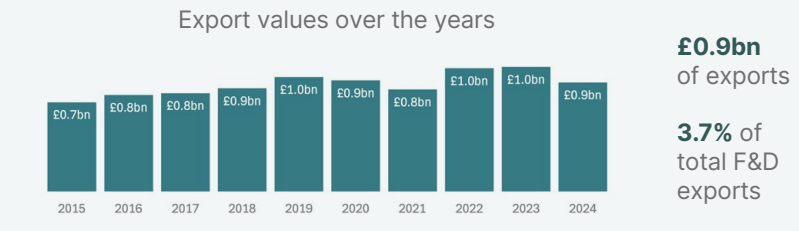
F&D manufacturing accounts for
20.6% of total manufacturing GVA
11.8% of total manufacturing turnover

The region delivers:
11.8% of total F&D manufacturing GVA
9.8% of total F&D manufacturing turnover



Top markets by value

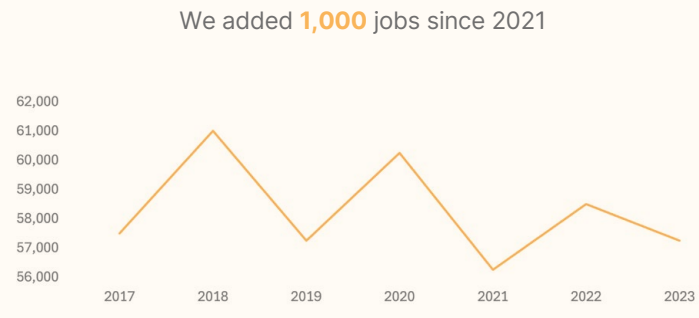
Category	Value	Country	Value	Country	Value
Cereals	£260.4m -36.1%	Ireland	£101.9m	Netherlands	£22.6m
		France	£34.2m	Germany	£26.7m
		Netherlands	£35.4m	Ireland	£23.1m
Meat	£128.1m -5.5%	France	£34.2m	Germany	£26.7m
		Netherlands	£35.4m	Ireland	£23.1m
		Ireland	£17.8m	France	£11.1m
Coffee & tea	£121.8m 23.0%	Netherlands	£35.4m	Ireland	£23.1m
		Ireland	£23.1m	France	£11.1m
		France	£11.1m		



Food & drink **manufacturing** makes up:
21.8% of total manufacturing employment
2.7% of total employment

Top sectors by **employment:**

Meat	12,500
Other foods	10,000
Bread & pastry	8,000
Fruit & veg juices	4,500
Prepared meals	4,500



Top sectors by **# of businesses:**

Bread & pastry	180
Beer	100
Other foods	85
Meat	65
Spirits	40

% of businesses by **employment:**

Large	3%
Medium	6%
Small	18%
Micro	72%

% of businesses by **turnover:**

Large	10%
Medium	15%
Small	41%
Micro	33%



East Midlands

The East Midlands food and drink manufacturing sector contributes £4.2bn to the UK economy. Industry giants like Weetabix and Müller drive innovation, while PepsiCo's Walkers, founded in Leicester in 1948, remains an iconic British brand.

The region's food heritage is reflected in products like Stilton cheese, Melton Mowbray pork pies, and Bakewell tarts, securing its position in the UK's food landscape.



PepsiCo's Walkers factory in Leicester, founded in 1948, is one of the world's largest crisp factories, employing over 1,200 people.

Since 2020, PepsiCo has invested over £140m in its UK manufacturing sites, reinforcing its commitment to the Midlands, where it employs over 2,100 people across Leicester, Coventry, and Lincoln. This investment focused on sustainability, facility upgrades for frontline workers, and a new production line for Walkers snacks, including a chickpea-based range. These new snacks contain less than 100 calories, 25% less salt than the average extruded product, and are a source of fibre.

Leicester is also home to one of PepsiCo's six global R&D hubs, where products are reformulated and developed for the UK and international markets. Work at the Beaumont Park R&D facility has led to an 18% salt reduction in Sensations crisps.

In 2024, PepsiCo expanded the use of hydrotreated vegetable oil (HVO) across its supply chain, cutting greenhouse gas emissions by an estimated 13,000 tonnes. HVO generates 85% less emissions than conventional diesel, significantly reducing the environmental impact of transport operations.

East Midlands



Based in Northamptonshire since 1932, Weetabix Food Company is a key local employer, contributing to both the national and local economy while supporting community projects such as Magic Breakfast and Fareshare.

Weetabix is one of the UK's best-selling, most trusted, and most recommended cereals, alongside iconic brands like Weetabix Crispy Minis, Alpen, Weetabix On The Go, Ready Brek, Weetos, and Alpen bars. The company produces 70 million biscuits a week at its Northamptonshire mills.

Weetabix products are found in over a third of British homes and are exported to 86 countries. The company has teams in the UK, Belgium, Madrid, and Dubai.

Through the Wheat Protocol, Weetabix sources its wheat from farms within 50 miles of its mills, working closely with its Growers Group, who share the company's commitment to sustainability. Sustainability is central to its strategy, known as the Change for Better approach, which focuses on maximising its positive impact on the environment, business, and communities.

West Midlands

GVA	£2.4bn
	+7.4%
Employment	38,000
	-15.6%
Businesses	955
	-3.0%
Exports	£1.0bn
	+14.6%

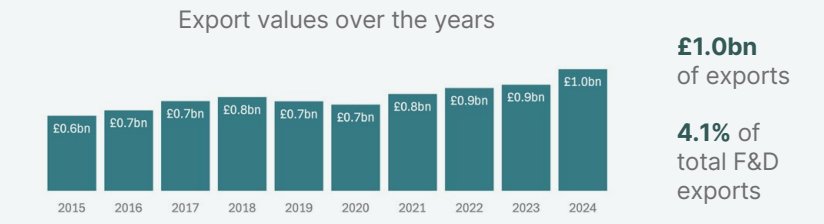
F&D manufacturing accounts for
11.5% of total manufacturing GVA
11.9% of total manufacturing turnover

The region delivers:
6.7% of total F&D manufacturing GVA
7.6% of total F&D manufacturing turnover



Top markets by value

Coffee & tea	£287.8m	+30.3%	Ireland £117.6m	Poland £57.0m	Netherlands £16.8m
Meat	£279.2m	+15.4%	France £110.4m	Netherlands £66.8m	Germany £42.3m
Cereals	£116.4m	+4.2%	Ireland £37.6m	Netherlands £18.0m	Australia £8.0m

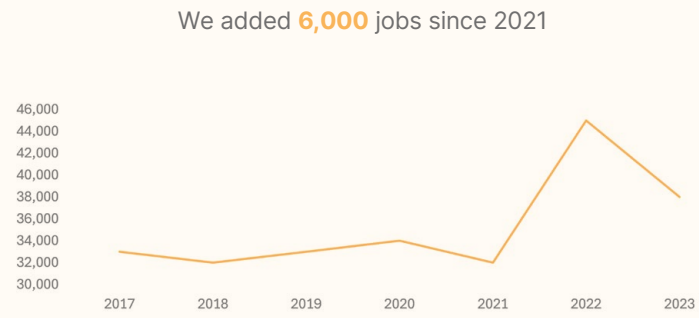


All figures use the latest available data
 2024: Business, Exports
 2023: Employment
 2022: GVA

Food & drink **manufacturing** makes up:
13.9% of total manufacturing employment
1.4% of total employment

Top sectors by **employment:**

Meat	12,000
Bread & pastry	6,000
Beer	3,000
Milk & cream	2,500
Other foods	2,500



Top sectors by **# of businesses:**

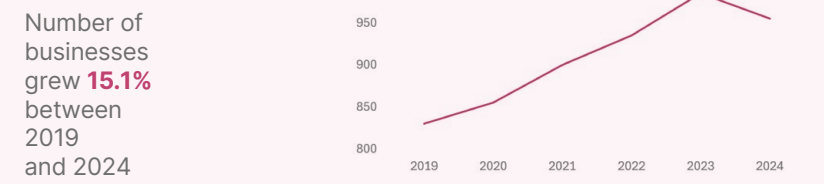
Bread & pastry	235
Meat	130
Other foods	115
Beer	100
Spirits	60

% of businesses by **employment:**

Large	3%
Medium	6%
Small	18%
Micro	73%

% of businesses by **turnover:**

Large	8%
Medium	16%
Small	44%
Micro	31%



West Midlands

The West Midlands' £2.4bn food industry is anchored by snacks and beverages. Mondelez and Marston's are key industry players, with Bournville remaining a global R&D hub for chocolate.

The region's food heritage includes Cadbury Dairy Milk and the Balti, while ongoing investments in sustainable production and skills training ensure continued growth.



Mondelez International invested over £3.25 million in its Bournville site in 2024. As part of Cadbury's 200th anniversary, £750,000 was allocated to refurbishing the Cadbury Archives, Cadbury Girls' Grounds, and Bournville Concert Hall, celebrating the brand's local heritage and revitalising key community assets.

The company also announced upgrades to its Global Centre of Excellence for Chocolate Research and Development. In 2024, 50 new Sensory Panellist (chocolate taster) roles were created at Bournville, which remains home to Mondelez's largest global R&D community, with over 400 food scientists, nutritionists, and engineers. Additionally, 85 young people joined the company's early careers programmes as graduates, interns, or apprentices, supported by partnerships with Psalt and Upreach to attract diverse talent.

Mondelez launched several non-HFSS products in 2024, including Cadbury Brunch Light (93 kcal per bar) and OREO No Added Sugar, launched after two years of research. In November 2024, Mondelez announced that 300 million Cadbury sharing bars in the UK and Ireland would transition to 80% recycled plastic. In August 2024, it introduced paper-based outer packaging for Cadbury biscuit bags, reducing virgin plastic use by 145 tonnes and ensuring recyclability.

Yorkshire & the Humber

GVA	£3.8bn	-0.9%
Employment	67,000	+18.6%
Businesses	1,005	-3.4%
Exports	£1.3bn	+9.5%



All figures use the latest available data
 2024: Business, Exports
 2023: Employment
 2022: GVA

F&D manufacturing accounts for

17.4% of total manufacturing GVA
21.6% of total manufacturing turnover

The region delivers:

10.7% of total F&D manufacturing GVA
13.7% of total F&D manufacturing turnover

GVA* grew **42.7%** since 2012

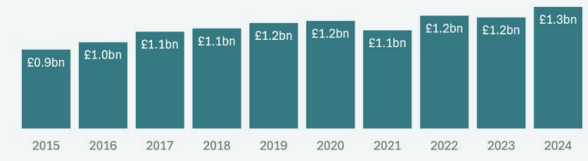


*Real GVA, index, 2019 = 100

Top markets by value

Category	Value	% Change	Country	Value	Country	Value	
Meat	£261.8m	-6.3%	Ireland	£64.2m	France	£47.1m	
	Coffee	£234.6m	+25.1%	Ireland	£45.2m	Netherlands	£38.1m
				China	£46.2m	United States	£19.1m
Cereals	£173.8m	0.0%	Ireland	£39.0m	France	£19.1m	
			Netherlands	£19.0m			

Export values over the years



£1.3bn of exports

5.5% of total F&D exports

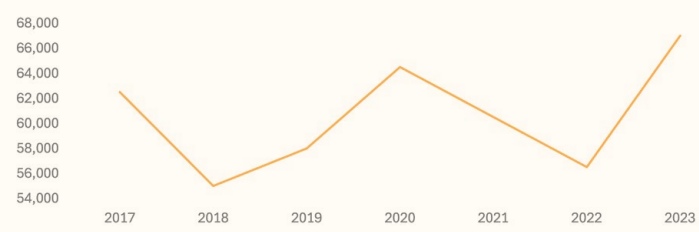
Food & drink manufacturing makes up:

24.7% of total manufacturing employment
2.7% of total employment

Top sectors by employment:

Meat	16,500
Bread & pastry	12,000
Other foods	5,000
Fish	4,500
Sugar confectionery	3,000

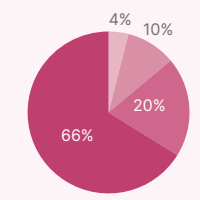
We added **4,500** jobs since 2017



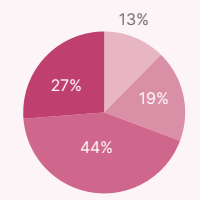
Top sectors by # of businesses:

Bread & pastry	225
Beer	130
Other foods	100
Meat	95
Spirits	55

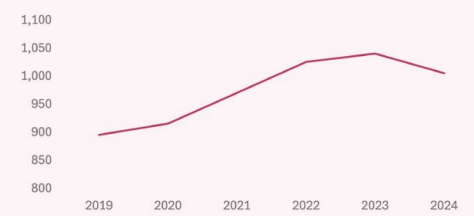
% of businesses by employment:



% of businesses by turnover:



Number of businesses grew **12.3%** between 2019 and 2024



Yorkshire & the Humber

Yorkshire's £3.8bn food sector is home to major firms like Nestlé, HARIBO, and KP snacks.

HARIBO's Pontefract and Castleford sites continue the region's confectionery tradition, dating back to Pontefract cakes in 1767. Yorkshire Pudding, Wensleydale cheese, and Parkin showcase the area's culinary legacy.

HARIBO



HARIBO is the UK's leading sweets manufacturer and one of Yorkshire's largest employers, operating two production sites in Pontefract and Castleford.

It employs 600 skilled staff across these sites, with an additional 100 colleagues in 11 retail stores across the UK.

In 2015, HARIBO invested £92m in a world-class manufacturing facility in Castleford, complementing its Pontefract site and strengthening UK production. A further £22m was invested in 2021 to increase capacity and efficiency. In 2023, two production lines reopened in Pontefract, while a new production and packing line is planned for Castleford in 2025. In October 2024, HARIBO began constructing a purpose-built warehouse in Castleford to manage increased volumes and safeguard 600 jobs.

As a responsible manufacturer, HARIBO invested millions in sugar reduction. Starmix and Tangfastics sweets contain 23% and 18% less sugar than similar brands. They have also recently launched TropiSlices (2024) and Alienauts (2025), making HARIBO the UK's leading manufacturer of reduced-sugar sweets.

HARIBO UK exports to Europe and North America, including the Netherlands, Belgium, the Republic of Ireland, and the United States.

Yorkshire & the Humber



The Nestlé York site is a major campus housing a 24/7 confectionery factory, a head office, a distribution centre, a Cereal Partners Worldwide R&D Centre, and the Nestlé Product Technology Centre – a global hub for confectionery research and development.

Employing over 2,000 people from 30+ nationalities, Nestlé is York's largest private employer. More than 55 apprentices, 15 graduates, and 5 placement students work at the site, with 58% of employees living within five miles.

The factory produces Aero, Polo, KitKat, and Yorkie. Nestlé has partnered with First Milk, a British farmer-owned dairy co-operative, since 2003 - which has ensured the sourcing high quality milk, an essential ingredient for KitKat chocolate, from local farms within 50 miles of Nestlé's Girvan factory in Ayrshire. Working closely with First Milk means that Nestlé can support dairy farmers who are working hard to reduce carbon emissions and improve biodiversity on farmland. KitKat products made in York are exported to over 40 countries.

Nestlé have invested over £85 million in the York site over the past decade, including refurbished office space and factory machinery upgrades to increase production capacity. In early 2025, Nestlé announced a £5.2 million investment for new cranes and upgrades at the on-site distribution centre.

Locally in York, Nestlé partners with York Cares, WildHearts, and PhunkyFoods to support local communities, careers education, and sustainability initiatives.

North East

- GVA** £0.6bn
-2.0%
- Employment** 13,000
+13.0%
- Businesses** 320
+1.6%
- Exports** £0.3bn
-6.7%

F&D manufacturing accounts for

- 6.7%** of total manufacturing GVA
- 8.0%** of total manufacturing turnover

The region delivers:

- 1.7%** of total F&D manufacturing GVA
- 1.8%** of total F&D manufacturing turnover

GVA* grew **13.9%** since 2015

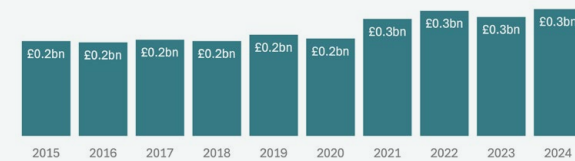


*Real GVA, index, 2019 = 100

Top markets by value

Category	Value	Change	Market	Value	Market	Value
Coffee & tea	£77.1m	+16.6%	Netherlands	£28.1m	Canada	£10.0m
			Ireland	£9.6m	Japan	£6.1m
			Lebanon	£6.6m	Dominican Rep.	£2.9m
Cereals	£43.6m	-22.1%	Netherlands	£3.7m	UAE	£2.2m
			France	£6.6m		
Dairy	£24.6m	-3.2%				

Export values over the years



£0.3bn of exports
1.3% of total F&D exports



All figures use the latest available data
2024: Business, Exports
2023: Employment
2022: GVA

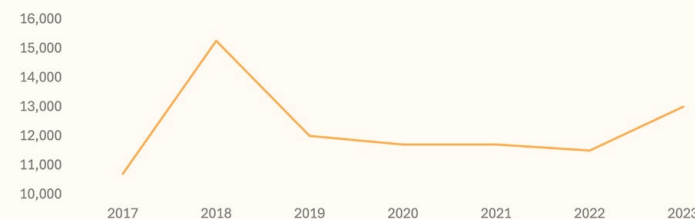
Food & drink manufacturing makes up:

- 11.7%** of total manufacturing employment
- 1.2%** of total employment

Top sectors by employment:

Bread & pastry	3,000
Beer	1,500
Biscuits	1,250
Meat	1,100
Other foods	900

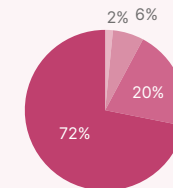
We added **2,300** jobs since 2017



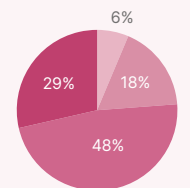
Top sectors by # of businesses:

Bread & pastry	75
Beer	55
Other foods	30
Spirits	20
Meat	20

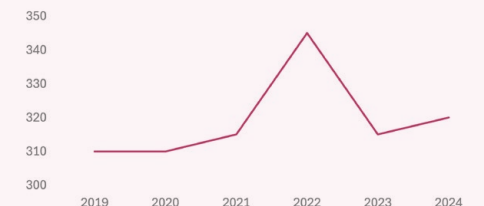
% of businesses by employment:



% of businesses by turnover:



Number of businesses grew **3.2%** between 2019 and 2024



North East

With a £600m GVA, the North East specialises in seafood, brewing, and baked goods. Major employers like Greggs and Quorn balance tradition with innovation, while KP Snacks' Billingham site produces nearly 1 billion packets annually, demonstrating the region's expertise in crisp production.

Local staples like stottie cake and pease pudding reflect its rich food heritage.



KP Snacks' Billingham site is the proud home of some of its iconic brands, including McCoy's, Pom-Bear, Hula Hoops Puft, and Discos.

Opened in 1969, KP's largest site now employs over 700 people and continues to grow. KP continues to invest in the site, and is expanding the facility to boost production capacity, enhance efficiency and quality, and improve workplace facilities for its colleagues.

The site has a rich history of snack production. It began operations in 1969 and started producing Hula Hoops in 1971 before shifting production to Ashby in 1982. McCoy's followed in 1985, and in 1989, the factory expanded to accommodate additional snack brands such as Frisps and Discos.

Further expansion in 2014 enabled in-house pellet production, allowing for the manufacture of Pom-Bear and Hula Hoops Puft. Today, the Billingham site produces an impressive 550 tonnes of snacks each week—equivalent to nearly 1 billion packets—solidifying its place as a key player in the UK snack industry.

North West

GVA	£4.4bn	+0.5%
Employment	57,000	-5.8%
Businesses	1,265	-1.9%
Exports	£2.0bn	-3.3%

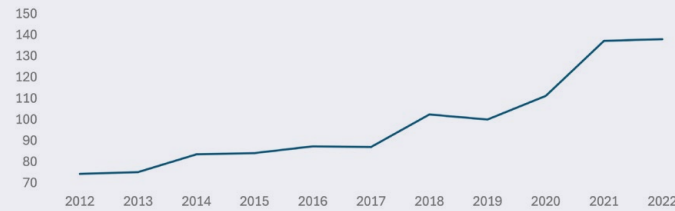
F&D manufacturing accounts for

- 15.0%** of total manufacturing GVA
- 16.4%** of total manufacturing turnover

The region delivers:

- 12.3%** of total F&D manufacturing GVA
- 12.9%** of total F&D manufacturing turnover

GVA* grew **85.7%** since 2012

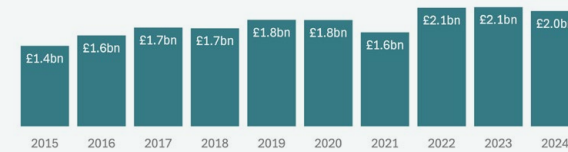


*Real GVA, index, 2019 = 100

Top markets by value

Category	Value	Change	Market 1	Market 2	Market 3
Cereals	£378.1m	-6.6%	Ireland	Australia	Belgium
			£112.3m	£23.2m	£22.7m
			Netherlands	France	Ireland
Dairy	£251.3m	-18.4%	Netherlands	France	Ireland
			£66.0m	£27.1m	£26.3m
			United States	Ireland	Netherlands
Beverages	£202.1m	-0.3%	United States	Ireland	Netherlands
			£36.5m	£19.6m	£12.6m

Export values over the years



£2.0bn of exports

8.2% of total F&D exports



All figures use the latest available data
 2024: Business, Exports
 2023: Employment
 2022: GVA

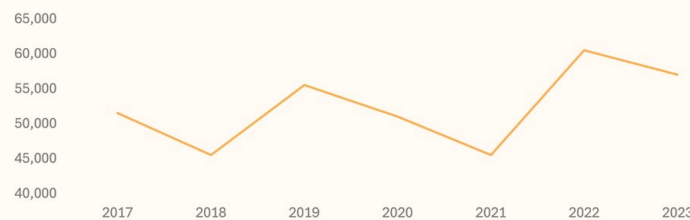
Food & drink manufacturing makes up:

- 17.9%** of total manufacturing employment
- 1.6%** of total employment

Top sectors by employment:

Bread & pastry	13,000
Meat	7,250
Biscuits	6,000
Prepared meals	6,000
Other foods	3,500

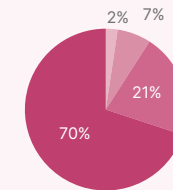
We added **5,500** jobs since 2017



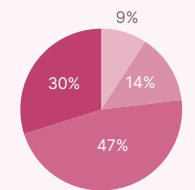
Top sectors by # of businesses:

Bread & pastry	325
Beer	135
Meat	130
Other foods	120
Spirits	75

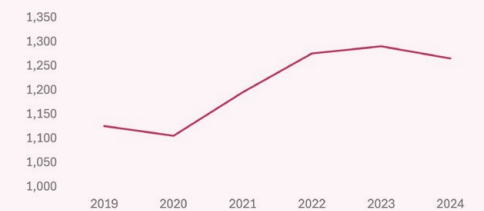
% of businesses by employment:



% of businesses by turnover:



Number of businesses grew **12.4%** between 2019 and 2024



North West

The North West's £4.4bn food industry excels in dairy, bakery, and soft drinks. Home to major firms like Kellanova and Warburtons, the region has a strong legacy in food innovation.

Carr's, dating back to 1831, pioneered biscuit production and remains a market leader. Famous for Lancashire Hotpot and Eccles Cakes, the region continues to invest in research and development, ensuring its status as a key player in the UK food industry.



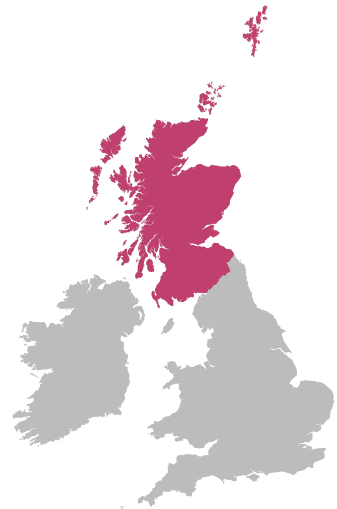
Originally known as the Carr's brand, established in 1831 by Jonathan Dodgson (JD) Carr, the factory in Carlisle was built over six years and opened in 1837, making it the oldest biscuit factory in the world. The world's first ever biscuit cutting machine was installed there in 1849.

pladis is renowned for producing the Carr's Table Water Crackers which are traditionally baked - to this day - in a brick oven to ensure their unique thin and crispy texture.

As part of his marketing strategy, JD Carr supplied multiple expeditions with his Table Water biscuits, including the maiden voyage of the Titanic. The site itself is approximately 103,500 m² in size and currently employs over 850 permanent employees with an average length of service of 12.5 years. pladis produce 246 products across 19 process lines, annually making some 80,000 tonnes of product.

Scotland

GVA	£5.2bn	-0.1%
Employment	47,000	+6.8%
Businesses	1,220	-2.4%
Exports	£6.9bn	-1.2%



All figures use the latest available data
 2024: Business, Exports
 2023: Employment
 2022: GVA

F&D manufacturing accounts for

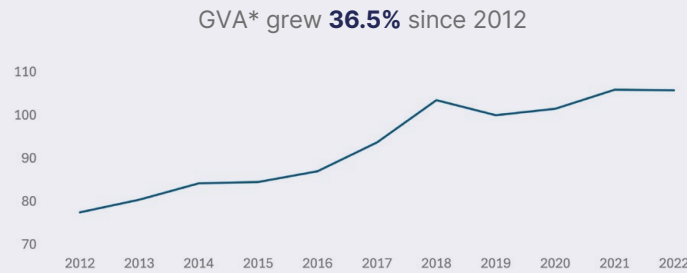
30.8% of total manufacturing GVA

31.1% of total manufacturing turnover

The region delivers:

14.4% of total F&D manufacturing GVA

11.1% of total F&D manufacturing turnover

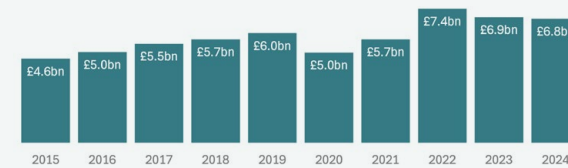


*Real GVA, index, 2019 = 100

Top markets by value

Category	Value	Change	Country	Value	Country	Value	Country		
Beverages	£4,992.5m	-4.8%	USA	£975.2m	France	£393.1m	Singapore	£243.3m	
	Fish	£1,206.2m	+16.9%	France	£721.2m	United States	£139.3m	China	£69.0m
				United States	£38.5m	Ireland	£36.9m	Netherlands	£24.1m
Cereals	£227.2m	-7.5%	United States	£38.5m	Ireland	£36.9m	Netherlands	£24.1m	

Export values over the years



£6.8bn of exports

28.0% of total F&D exports

Food & drink manufacturing makes up:

27.0% of total manufacturing employment

1.8% of total employment

Top sectors by employment:

Spirits	10,000
Fish	7,000
Bread & pastry	7,000
Meat	5,500
Biscuits	4,000

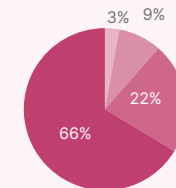
We added **4,000** jobs since 2017



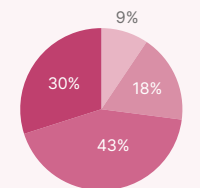
Top sectors by # of businesses:

Bread & pastry	260
Spirits	235
Beer	115
Fish production	110
Meat	95

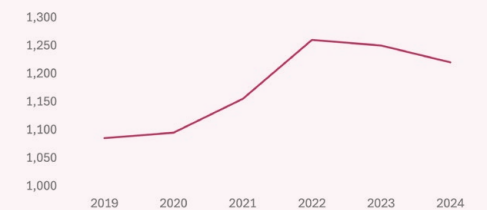
% of businesses by employment:



% of businesses by turnover:



Number of businesses grew **12.4%** between 2019 and 2024



Scotland

Scotland's £5.2bn food and drink sector is renowned for whisky, dairy, and bakery products. Nestlé's Girvan factory produces chocolate crumb for KitKats and Yorkies, using locally sourced Ayrshire milk.

Scotch whisky, Scottish Seafood and Scotch Beef contribute to Scotland's strong export market, while investment in regenerative farming and sustainability secures its future as a leader in high-quality food production.



Nairn's continues to invest in its sites annually to maximise production and ensure long-term efficiency.

A recent control system replacement on an older oven extended its lifespan by 10 years at a fraction of the cost of a new unit.

Over the past year, Nairn's has strengthened its team to support future growth, appointing a Marketing Director and Controller, creating a Board-level Head of HR role, and adding continuous improvement roles in Production and Supply Chain. An additional shift has been recruited to meet growing demand.

In early 2024, Nairn's launched a Marmite & Cheese oatcake in collaboration with Unilever, successfully attracting younger consumers to the oatcake category.

Sustainability remains a priority, with investments in solar panels and voltage optimisation reducing power usage. On sunny days, the company's gluten-free site can run entirely on solar power. A long-term agreement with Menzies Distribution Services has also cut food miles through more efficient transport routing and double-decker trailers. Nairn's has a clear ESG strategy in place to drive further progress in the coming years.

Wales

GVA	£1.7bn	+0.7%
Employment	26,500	+6.0%
Businesses	575	-3.4%
Exports	£0.7bn	+4.4%



All figures use the latest available data
 2024: Business, Exports
 2023: Employment
 2022: GVA

F&D manufacturing accounts for

14.7% of total manufacturing GVA
15.7% of total manufacturing turnover

The region delivers:

4.7% of total F&D manufacturing GVA
5.8% of total F&D manufacturing turnover

GVA* grew **45.3%** since 2012

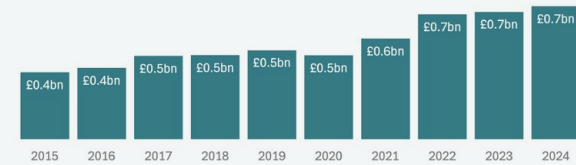


*Real GVA, index, 2019 = 100

Top markets by value

Category	Value	Change	Country	Value	Country	Value
Meat	£204.3m	+1.8%	France	£103.4m	Belgium	£43.1m
			Ireland	£55.9m	France	£12.8m
			Turkey	£11.9m		
Cereals	£169.6m	-3.2%	Ireland	£55.9m	Belgium	£16.1m
			Belgium	£15.5m		
			Ireland	£33.1m		
Dairy	£137.6m	+4.8%	Ireland	£33.1m	Belgium	£15.5m
			France	£103.4m		
			Turkey	£11.9m		

Export values over the years



£0.7bn of exports
3.0% of total F&D exports

Food & drink manufacturing makes up:

19.1% of total manufacturing employment
2.0% of total employment

Top sectors by employment:

Meat	5,500
Bread & pastry	4,500
Prepared meals	4,000
Other foods	2,250
Breakfast cereals	1,750

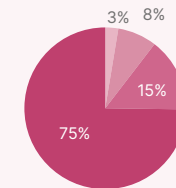
We added **3,750** jobs since 2017



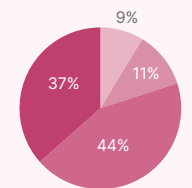
Top sectors by # of businesses:

Bread & pastry	140
Beer	85
Other foods	55
Meat	45
Spirits	35

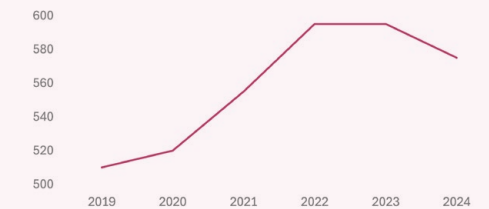
% of businesses by employment:



% of businesses by turnover:



Number of businesses grew **12.7%** between 2019 and 2024



Wales

Wales' £1.7bn food industry supports thousands jobs, combining heritage with modern manufacturing.

The region is famous for Welsh Cakes, Bara Brith, and Welsh Lamb, while Kellanova's Wrexham factory, Europe's largest cereal site, recently received a £75m investment to drive innovation.



In October 2024, Kellanova announced a £75m investment in the Kellogg's factory in Wrexham – the largest investment in British cereal production in 30 years.

This will make the Wrexham plant Europe's largest cereal factory, producing 1.5 million boxes per day and ensuring the continued UK production of iconic brands.

The investment will create at least 130 new jobs and support career development for 350 existing employees. It will also upgrade training facilities to provide employees with new skills and career progression opportunities.

Innovation remains key to Kellanova's growth. In 2024, the company introduced Special K Crunchy Golden Clusters, high in fibre, and new variety Krave Choco Brownie flavour. In January 2025, it launched Oaties, a high fibre, wholegrain oat cereal that is family friendly and non-HFSS.

As part of the £75m investment in Wrexham, two advanced production lines will use AI and machine learning to lower energy consumption, reducing cereal production CO2 emissions by 11% annually – the equivalent of 600,000 trees.

Northern Ireland

GVA	£1.2bn	+9.1%
Employment	22,895	+1.6%
Businesses	560	-2.6%
Exports	£2.3bn	+4.5%

F&D manufacturing accounts for

20.2% of total manufacturing GVA
33.0% of total manufacturing turnover

The region delivers:

3.3% of total F&D manufacturing GVA
5.1% of total F&D manufacturing turnover

GVA* grew **17.1%** since 2018

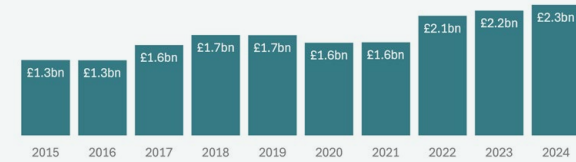


*Real GVA, index, 2019 = 100

Top markets by value

Dairy	£697.4m	Ireland £488.7m	Denmark £31.9m	Netherlands £31.0m
	+10.3%			
Beverages	£497.0m	Ireland £230.5m	United States £90.2m	Singapore £9.7m
	-1.2%			
Meat	£441.8m	Ireland £216.9m	France £69.7m	Netherlands £42.2m
	+4.3%			

Export values over the years



£2.3bn of exports

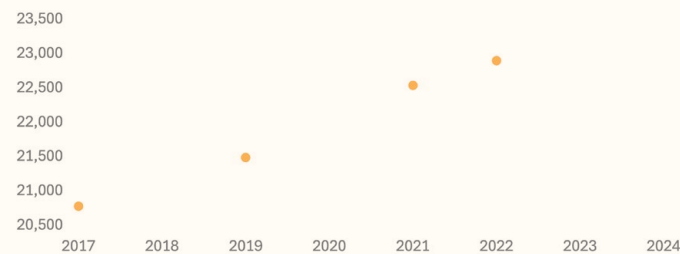
9.3% of total F&D exports



All figures use the latest available data
 2024: Business, Exports
 2023: Employment
 2022: GVA

Food & drink **manufacturing** makes up:
26.0% of total manufacturing employment
2.9% of total employment

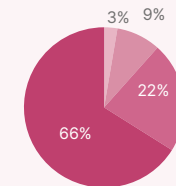
We added **2,119** jobs since 2017



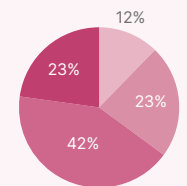
Top sectors by # of businesses:

Bread & pastry	140
Meat	65
Animal feed	50
Other foods	45
Fruit & veg juices	35

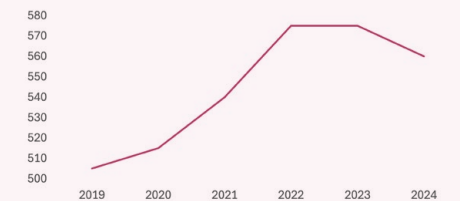
% of businesses by employment:

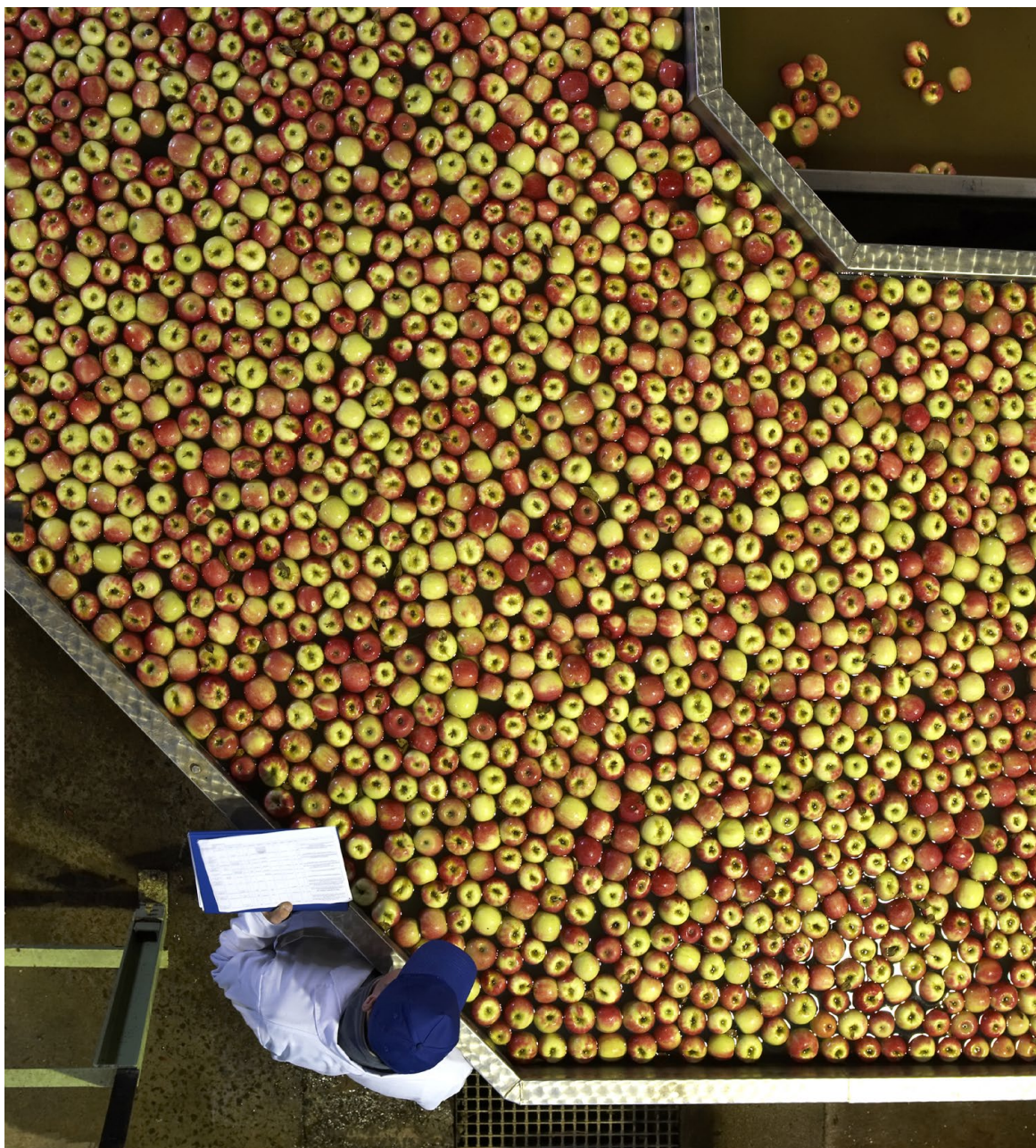


% of businesses by turnover:



Number of businesses grew **10.9%** between 2019 and 2024





Ingredients for growth

DRIVING GROWTH IN FOOD & DRINK MANUFACTURING

The food and drink manufacturing industry is uniquely placed to help the economy grow, create more, higher-skilled jobs, drive investment, boost trade and provide healthier choices for consumers.

Ingredients for Growth is our plan to remove roadblocks to growth and create a food system for the UK that is green and adaptive, productive and growing, nourishing and innovative.



Read the report
at fdf.org.uk



Shaping the future of food and drink manufacturing

Our industry is at the heart of everyone'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](https://www.fdf.org.uk) | [X: @FoodanddrinkFed](https://twitter.com/FoodanddrinkFed) | [Linkedin](#) | [Bluesky](#)