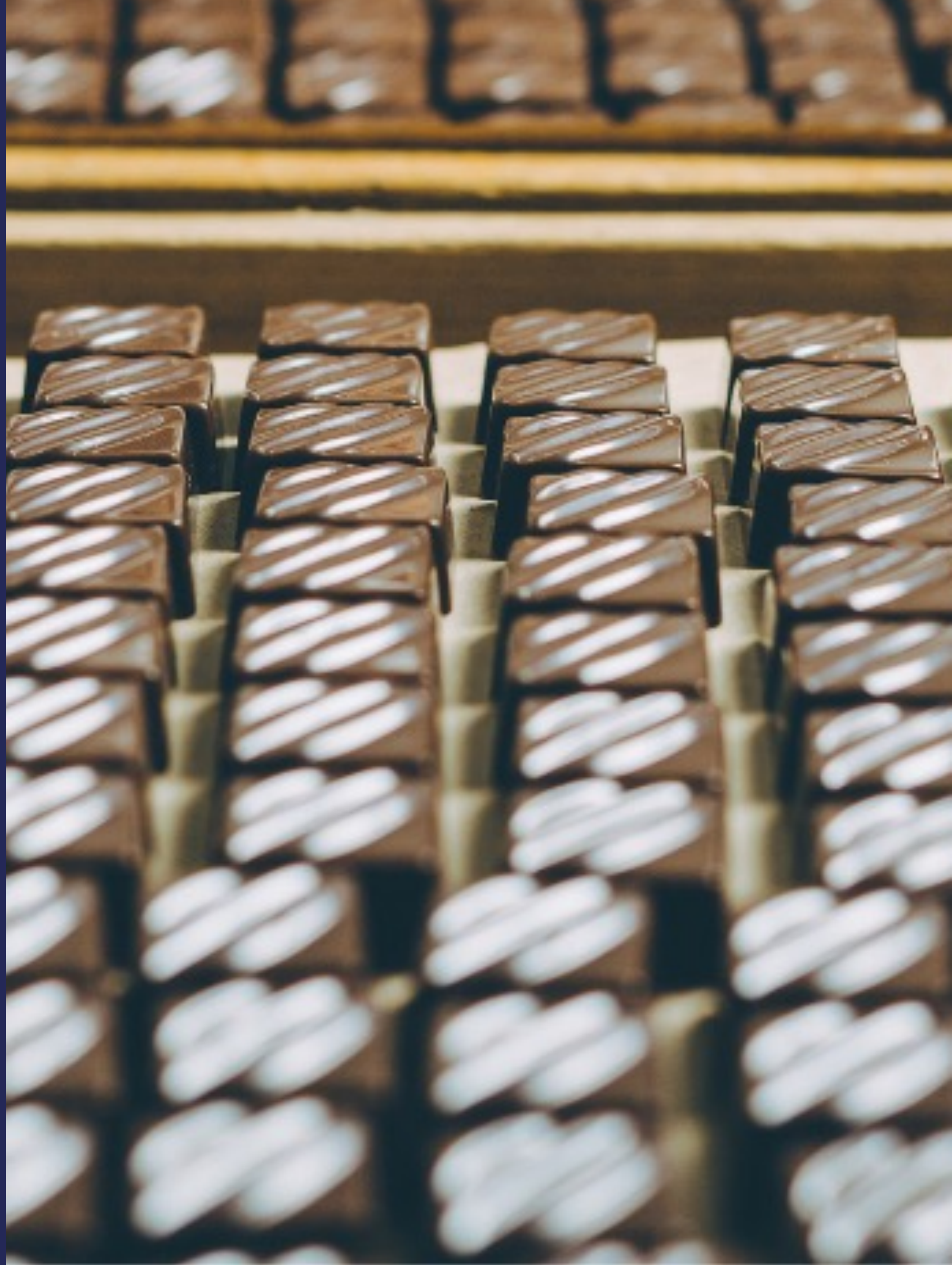


# Trade Snapshot 2024



**fdf** food & drink  
federation

**F|D|E|A**  
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 for the whole of 2024. It explores the key trends, challenges and opportunities in global markets.

**Export volumes of food are down** compared to last year. Opportunities exist to leverage FTAs such as CPTPP and to target emerging markets like Türkiye and GCC countries. Exports to the USA showed strong growth, with prospects of a UK-US trade deal that could preempt tariffs being an opportunity to protect vulnerable sectors.

**Imports of food and drink are at their highest ever level.** However, challenges remain on ensuring universal food safety regulatory compliance, with many products now subject to enhanced UK import controls. Improved engagement with suppliers and competent authorities abroad is required. Moreover, a facilitative regime for importing product samples would help unlock key investment in the industry, making the UK a hub for food and drink R&D.

It has been five years since the UK's departure from the European Union. **The UK's global food export volumes have declined significantly more than other major European countries**, demonstrating that the UK's challenges aren't part of a global trend but rather unique to the UK's post-Brexit circumstances. Working towards an SPS agreement would help mitigate trade disruptions and enhance competitiveness.





## EXPORTS

- Food and non-alcoholic drink exports totalled £16.9bn, the highest recorded value with year-on-year growth at 2.6%. Food and drink exports reached £24.5bn, with a modest 0.3% increase.
- Food and drink price inflation is on the rise again, and this must be considered in the overall context, with kilogram volumes down 12.6% year-on-year.
- Following HMRC corrections to identified underreporting issues, whisky data has been revised and now shows a value of £5.5bn, a 3.5% rise in volume.
- Salmon exports have surged with an almost 50% increase in volume, making it one of the top performing products.
- For exporters, [Türkiye](#) is a valuable market for high-quality value-added products, and it has seen 23.4% growth. There is untapped potential to [increase quotas](#) currently exceeded by UK exporters.
- Ireland, France and the USA remain the top three markets, with the USA showing remarkable growth of 11.8%.
- Two years on from entry into force of the FTA, exports to Australia are rising. Earlier guidance would help exporters use the FTA sooner.
- An ambitious agreement with the GCC could significantly grow exports of British products including breakfast cereals, herbal teas and ice cream.

Data Sources: His Majesty's Customs & Excise

### KEY INDICATORS

	2024	2023	Change 2023 - 24
Food and non-alcoholic drink	£16.9bn	£16.5bn	2.6%
All food and drink	£24.5bn	£24.4bn	0.3%
EU	£14.0bn	£14.0bn	0.5%
Non-EU	£10.4bn	£10.4bn	0.2%
EU share	57.3%	57.3%	0.0pp
Non-EU share	42.7%	42.7%	0.0pp

### TOP TEN EXPORTS

	2024	Value change 2023 - 24	Volume change 2023 - 24
Whisky	£5.5bn	-3.9%	3.5%
Chocolate	£953.3m	10.9%	1.4%
Salmon	£950.2m	41.7%	49.2%
Cheese	£887.9m	8.6%	9.8%
Milk and cream	£768.1m	-22.2%	-4.9%
Soft drinks	£683.7m	8.2%	N/A
Beef	£672.2m	15.0%	9.0%
Breakfast cereals	£609.3m	-12.2%	-33.0%
Lamb and mutton	£596.2m	6.5%	-5.3%
Fish	£534.2m	-5.3%	5.5%

### TOP PERFORMING PRODUCTS



Juices

YTD value **£69.1m**  
YOY growth **60.4%**



Salmon

YTD value **£950.2m**  
YOY growth **41.7%**



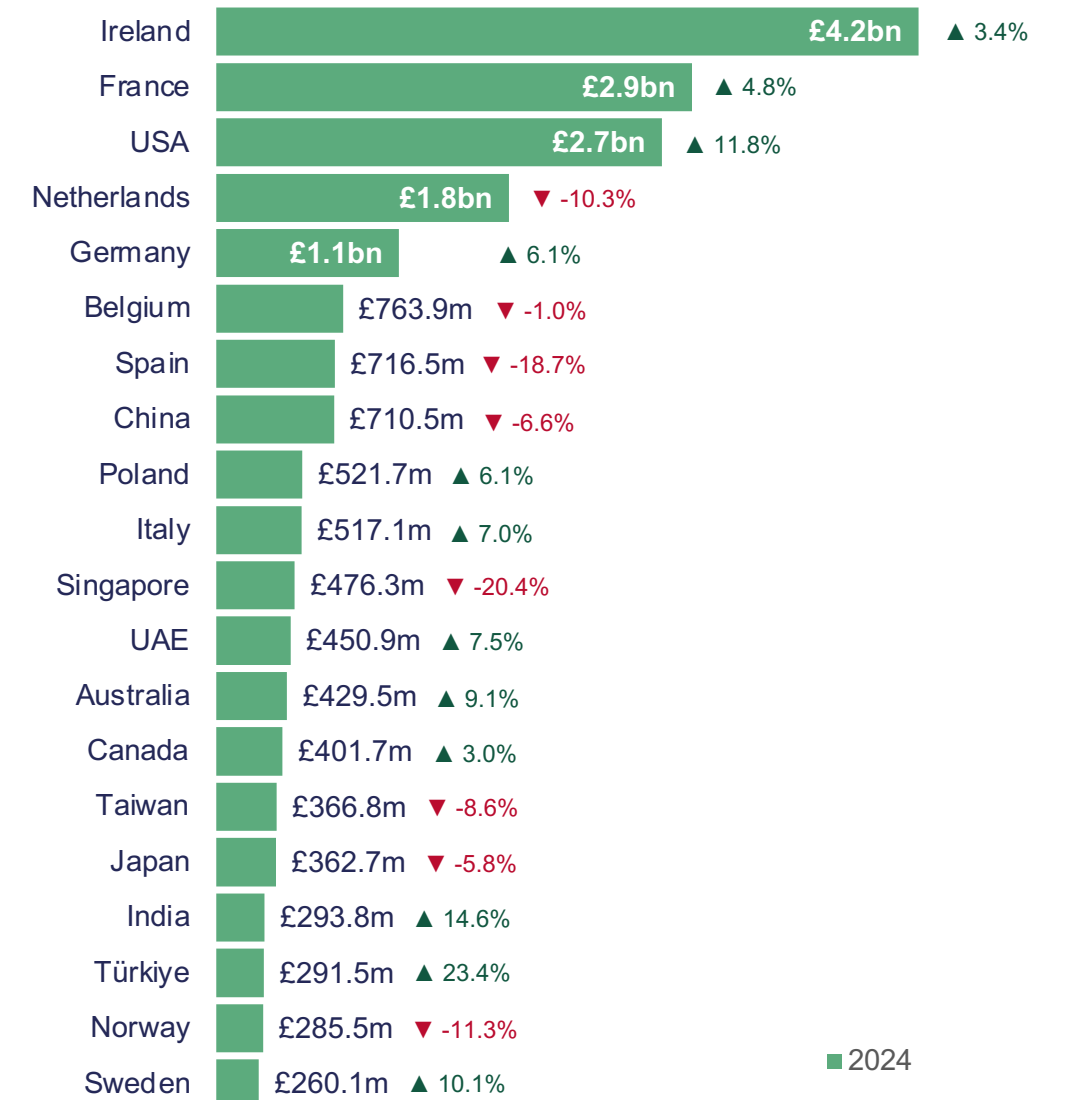
Coffee

YTD value **£257.5m**  
YOY growth **36.5%**

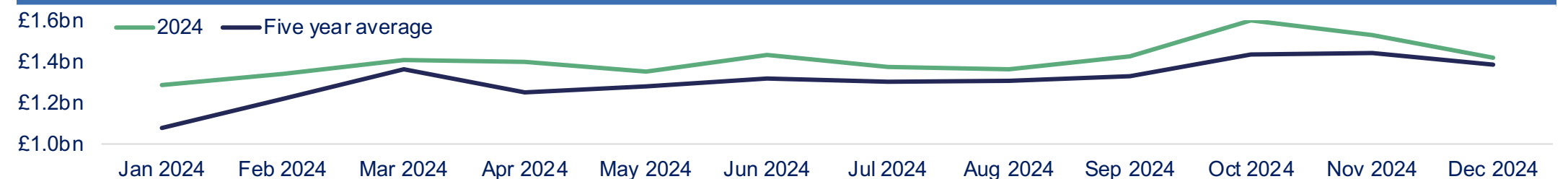
### EXPORT VOLUMES

Unit of measurement	2024	Change 2022 - 2024	Change 2023 - 2024
Kilograms (KG)	8.4bn	-14.4%	-12.6%
Litres (L)	1.2bn	-1.6%	3.3%
Litres of pure alcohol (LPA)	507.8m	-15.7%	4.0%

### TOP TWENTY MARKETS



### FOOD AND NON-ALCOHOLIC DRINK EXPORTS



## IMPORTS

- Imports of food and drink are at their highest ever level, worth £63.1bn. Imports from the EU and non-EU both increased by 3.3% and 7.4%, respectively.
- There was steady demand for imported produce, with Morocco (30.4%) South Africa (13.8%), and China (13.1%) seeing the largest increases.
- Import volumes measured in kilograms and litres both grew year-on-year.
- Fruits remains our top import product, growing by 5.3% in volume and reaching £5.2bn. Poultry (5.7%) and cheese (3.9%) were also in higher demand
- A more permissive regime for importing product samples is required. The system should incorporate the flexibility of the current approach to personal imports and make use of existing import assurances to mitigate risk.
- A better samples regime that builds on international best practice systems like the USA and Singapore will help unlock key investment in UK food and drink manufacturing and help the UK become a hub for food and drink R&D.
- Rest of world imports continue to see the benefits of the permissive, risk-based approach of the Border Target Operating Model. This has allowed many products to be exempt from burdensome checks and certification requirements on entry into UK.

Data Sources: His Majesty's Customs & Excise

### KEY INDICATORS

	2024	2023	Change 2023 - 24
Food and non-alcoholic drink	£57.6bn	£54.6bn	5.4%
All food and drink	£63.1bn	£60.4bn	4.5%
EU	£44.7bn	£43.2bn	3.3%
Non-EU	£18.5bn	£17.2bn	7.4%
EU share	70.7%	71.5%	-0.8pp
Non-EU share	29.3%	28.5%	0.8pp

### TOP TEN IMPORTS

	2024	Value change 2023 - 24	Volume change 2023 - 24
Fruits	£5.2bn	14.0%	5.3%
Wine	£3.9bn	-3.7%	2.3%
Vegetables	£3.6bn	3.9%	N/A
Poultry	£3.3bn	3.0%	5.7%
Chocolate	£2.9bn	13.9%	0.0%
Savoury snacks	£2.3bn	2.0%	3.3%
Pork	£2.2bn	-2.4%	0.1%
Cheese	£2.1bn	4.6%	3.9%
Fish	£2.0bn	-0.4%	2.9%
Soft drinks	£1.9bn	4.5%	N/A

### EU IMPORT PROCESS FOR PRODUCT SAMPLES



Importing samples is needlessly complicated and is often too costly for such a small quantity of product

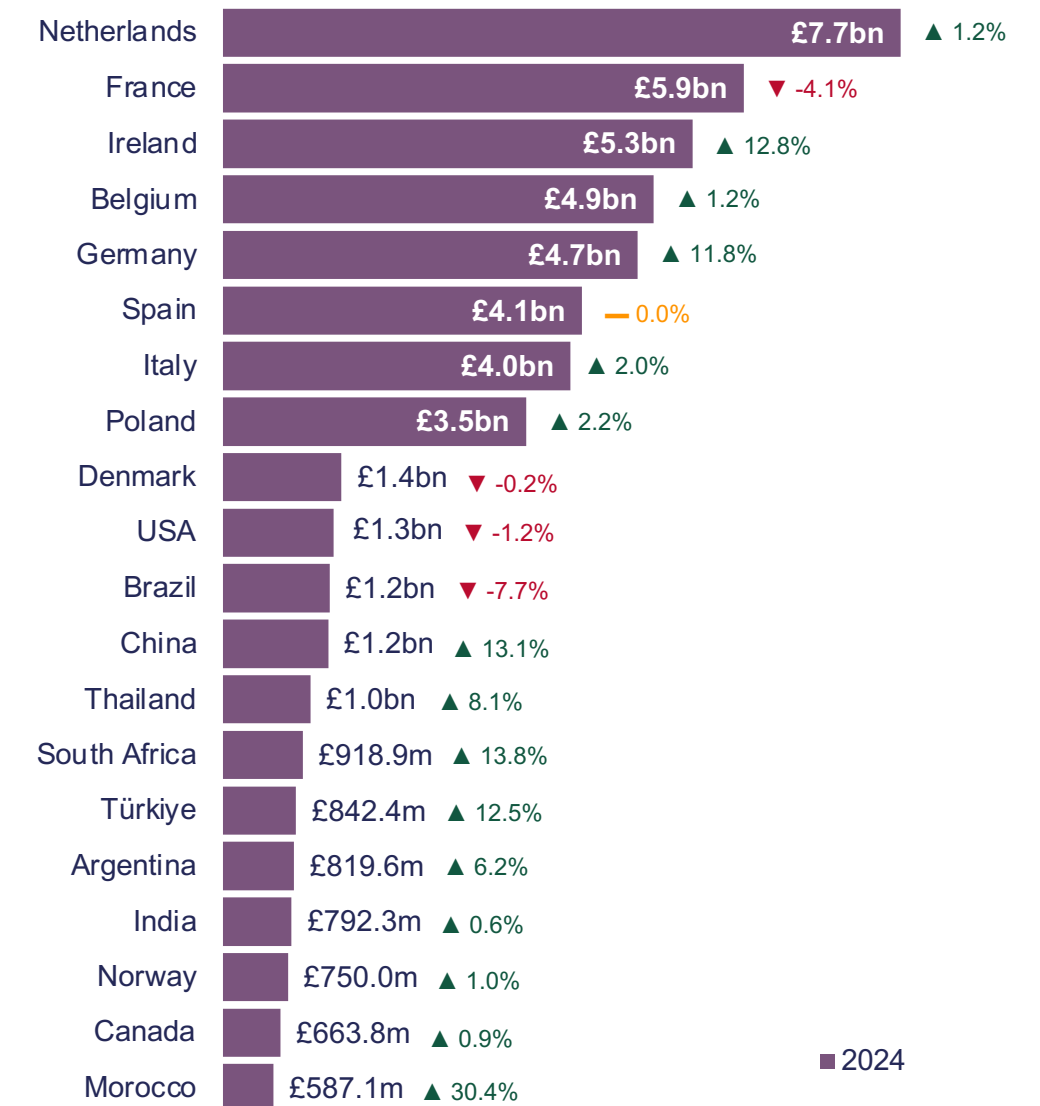


A 2kg personal import of the same product can be brought into the UK with no requirements and consumed at home

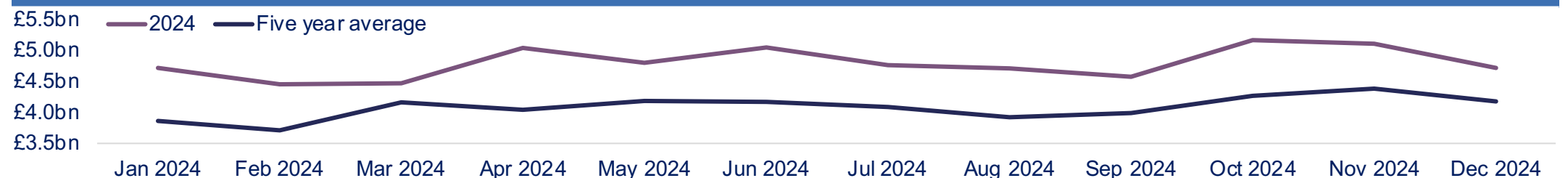
### IMPORT VOLUMES

Unit of measurement	YTD 2024	Change 2022 - 2024	Change 2023 - 2024
Kilograms (KG)	37.6bn	8.8%	10.3%
Litres (L)	4.7bn	-4.4%	1.1%
Litres of pure alcohol (LPA)	89.4m	-4.3%	-4.4%

### TOP TWENTY MARKETS



### FOOD AND NON-ALCOHOLIC DRINK IMPORTS

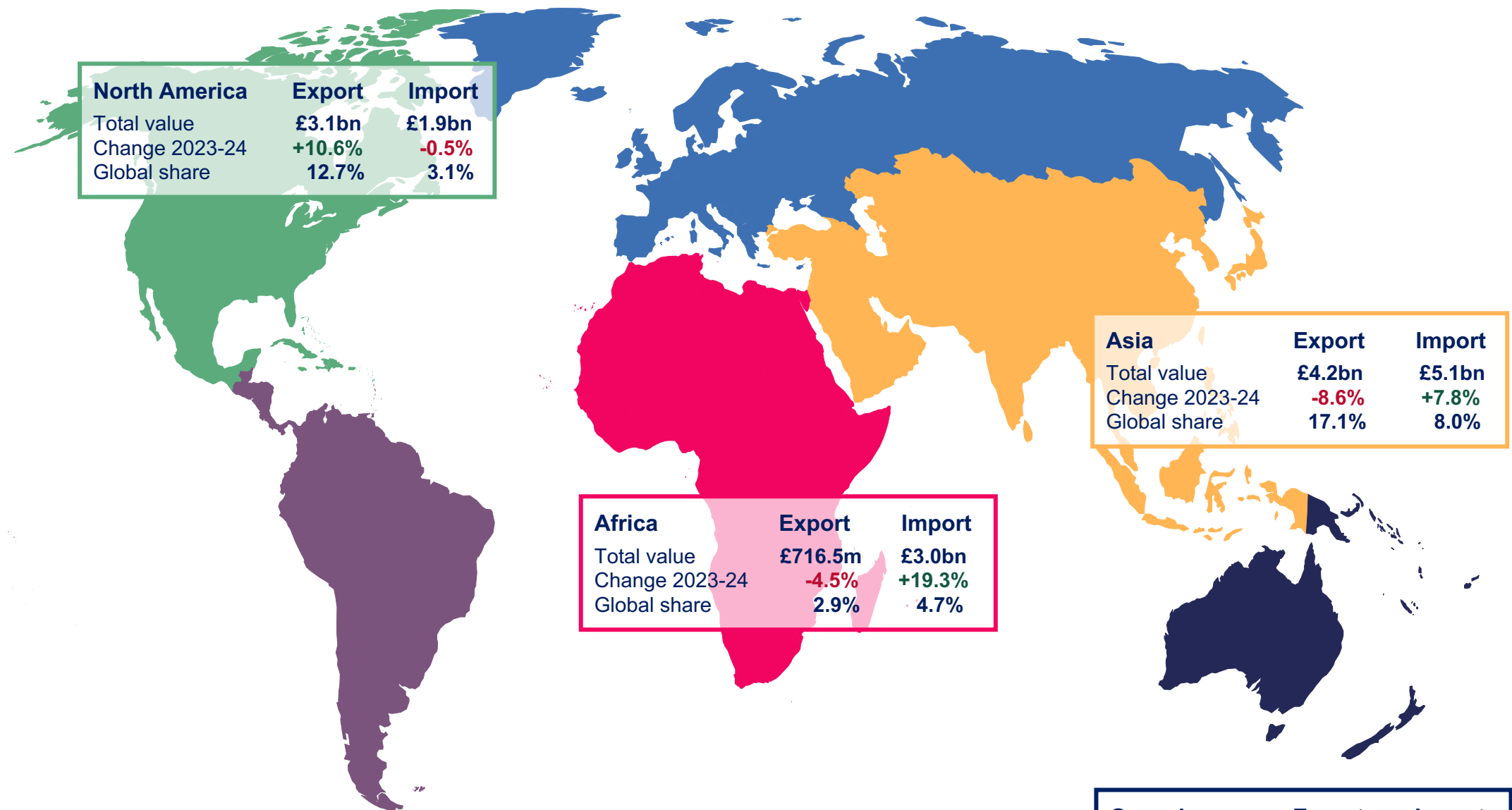


## WORLD TRADE

- Europe is our most important trade partner, representing 61.8% of our exports and 75.6% of our imports.
- However, in 2024, food export volumes to the EU fell by 17.2%. In contrast, rest of the world food export volumes increased by 5.7%.
- Exports to Asia fell by 8.6% over 2024. The UK's accession to CPTPP should help address this decline.
- Import duties are a key foreign policy mechanism for the new US administration. Canada, Mexico, and China have been hit by new tariffs, which has caused retaliatory tariffs.
- Although the UK doesn't have a trade deficit with the US, reciprocal tariffs that match foreign VAT could impose tariffs of up to 20% on some UK exports.
- Products that are heavily exposed to the US include alcoholic beverages (share to the US ranges from 18-40%), infant food (51%), salmon (29%) and tea (20%).
- The prospects of a UK-US trade deal that could preempt tariffs are an opportunity to protect vulnerable sectors.
- US tariff policies have indirect effects on the UK food and drink sector, despite the absence of direct tariffs. Supply chain disruptions and potential inflation may impact the industry, with outcomes becoming more apparent as it unfolds.

World	Export	Import
Total value	£24.5bn	£63.1bn
Change 2023-24	+0.3%	+4.5%

Europe	Export	Import
Total value	£15.1bn	£47.7bn
Change 2023-24	+0.9%	+3.9%
Global share	61.8%	75.6%



North America	Export	Import
Total value	£3.1bn	£1.9bn
Change 2023-24	+10.6%	-0.5%
Global share	12.7%	3.1%

Asia	Export	Import
Total value	£4.2bn	£5.1bn
Change 2023-24	-8.6%	+7.8%
Global share	17.1%	8.0%

Africa	Export	Import
Total value	£716.5m	£3.0bn
Change 2023-24	-4.5%	+19.3%
Global share	2.9%	4.7%

Central and South America	Export	Import
Total value	£896.6m	£4.3bn
Change 2023-24	+6.6%	-0.5%
Global share	3.7%	6.8%

Oceania	Export	Import
Total value	£481.6m	£1.2bn
Change 2023-24	+5.1%	+8.8%
Global share	2.0%	1.8%

## EUROPEAN UNION



- It has been five years since the UK's departure from the European Union. The UK's food and drink trade volumes to its most important trading partner have experienced notable changes.
- The top exports to the EU are whisky, chocolate and cheese. Ireland remains a key trading partner for milk & cream exports and beef imports.
- Export volumes of food have declined sharply to the bloc, reaching 6.37bn kilograms in 2024. This is a 34.1% decline compared to 2019. Meanwhile, import volumes are at their highest level.
- The UK's global food export volumes are almost 20% lower on average between 2020-2024 than they were between 2015-2019. Comparing the UK to other major European partners, Germany, Italy, and the Netherlands all saw an increase in their average volumes. France had a decline of -5.7%.
- This decline shows that the UK's challenges aren't part of a global trend but rather unique to the UK's post-Brexit circumstances. Working towards a traditional SPS agreement would help mitigate trade disruptions and enhance competitiveness.
- Due to the current easements in place for certain EU fruit and vegetables ending in July this year, and checks on all goods set to rise, EU imports will be subject to higher friction when entering the UK.

European Union		Top Exports		Top Imports	
Export	Import	Whisky	£1.5bn	Wine	£2.9bn
£14.0bn	£44.7bn	Chocolate	£664.4m	Vegetables	£2.8bn
		Cheese	£641.6m	Chocolate	£2.8bn

Ireland		Top Exports		Top Imports	
Export	Import	Milk & cream	£374.5m	Beef	£1.2bn
£4.2bn	£5.3bn	Soft drinks	£313.2m	Cheese	£352.4m
		Chocolate	£264.7m	Savoury snacks	£329.6m

France		Top Exports		Top Imports	
Export	Import	Salmon	£490.9m	Wine	£1.3bn
£2.9bn	£5.9bn	Whisky	£426.3m	Savoury snacks	£378.7m
		Lamb & mutton	£329.1m	Chocolate	£313.6m

Netherlands		Top Exports		Top Imports	
Export	Import	Chocolate	£157.0m	Vegetables	£772.8m
£1.8bn	£7.7bn	Beef	£115.8m	Poultry	£612.9m
		Cheese	£98.9m	Potatoes	£552.2m

Germany		Top Exports		Top Imports	
Export	Import	Whisky	£173.5m	Chocolate	£571.7m
£1.1bn	£4.7bn	Lamb & mutton	£105.0m	Savoury snacks	£292.8m
		Cheese	£48.1m	Pork	£262.3m

Belgium		Top Exports		Top Imports	
Export	Import	Lamb & mutton	£77.3m	Potatoes	£547.0m
£0.8bn	£4.9bn	Whisky	£77.1m	Chocolate	£496.0m
		Butter	£60.7m	Wine	£298.6m

## PAN EURO-MEDITERRANEAN RULES OF ORIGIN

The PEM harmonizes preferential origin rules among EU, EFTA, Faroe Islands, Turkey, Balkans, Middle East, and North Africa.

It enables diagonal cumulation, simplifying preferential tariff access.

Ingredients from one PEM member can be 'originating' when processed for export to another.

## COMPREHENSIVE SPS AGREEMENT

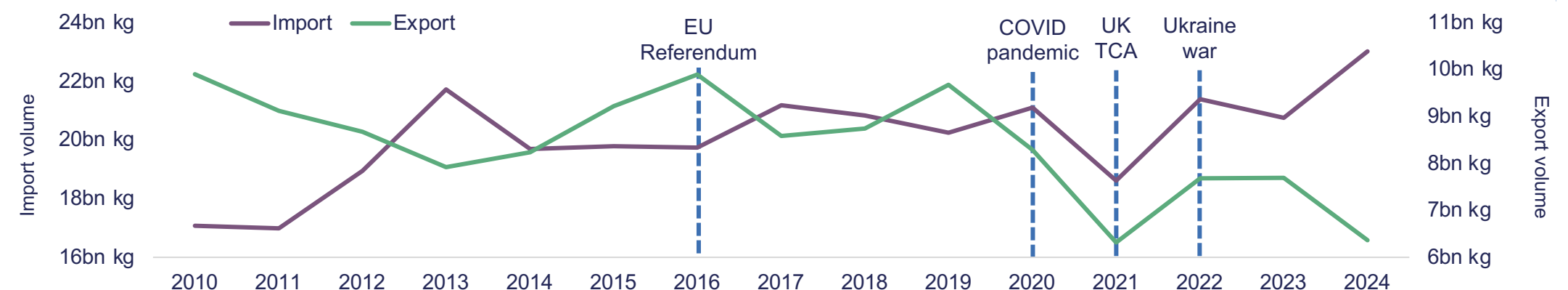
An agreement could lead to the following benefits:

- Full digitisation/electronic submission of food and drink certification
- Certification equivalence
- Streamlined border clearance
- Reduced physical inspections
- Reduced border fees

## GLOBAL FOOD EXPORT VOLUMES

	Qtly average 2015 - 19	Qtly average 2020 - 2024	Change
United Kingdom	3.0bn kg	2.4bn kg	-19.8%
France	14.9bn kg	14.0bn kg	-5.7%
Germany	13.0bn kg	13.4bn kg	3.0%
Italy	4.6bn kg	5.0bn kg	7.2%
Netherlands	12.7bn kg	14.3bn kg	12.2%

## UK FOOD VOLUMES WITH THE EUROPEAN UNION





CHINA



- China is an important trading partner for food and drink, representing the UK's 8<sup>th</sup> largest export market, and 12<sup>th</sup> largest import market in 2024.
- Fish (£246.4m) and poultry (£120.4m) are the top imports. China is a supplier of increasing importance for organic ingredients and ingredients not easily sourced from elsewhere including green tea and pumpkin seeds.
- Exports to China fell by 6.6% year-on-year, while imports increased by 13.1%. The trade deficit in 2024 is the largest we have seen over the past ten years.
- The UK is a significant supplier of whisky and pork to China. Exports of salmon performed well, increasing by 97.5% in volume.
- Regional contributions to UK food and drink exports to China showed Scotland leading with £182.0m over the last four quarters, followed by the North West at £96.2m.
- Food safety regulatory compliance needs to be a key area of focus, with China having the third highest failed safety checks over 2024. Further engagement with Chinese suppliers is therefore required.
- China and the USA are embroiled in an escalating trade war, which will disrupt food and drink trade flows globally.

KEY INDICATORS			
	2024	2023	Change 2023 - 24
Exports	£710.5m	£760.5m	-6.6%
Imports	£1.2bn	£1.1bn	13.1%
Trade Balance	£-497.7m	£-308.0m	-61.6%

BORDER NOTIFICATIONS



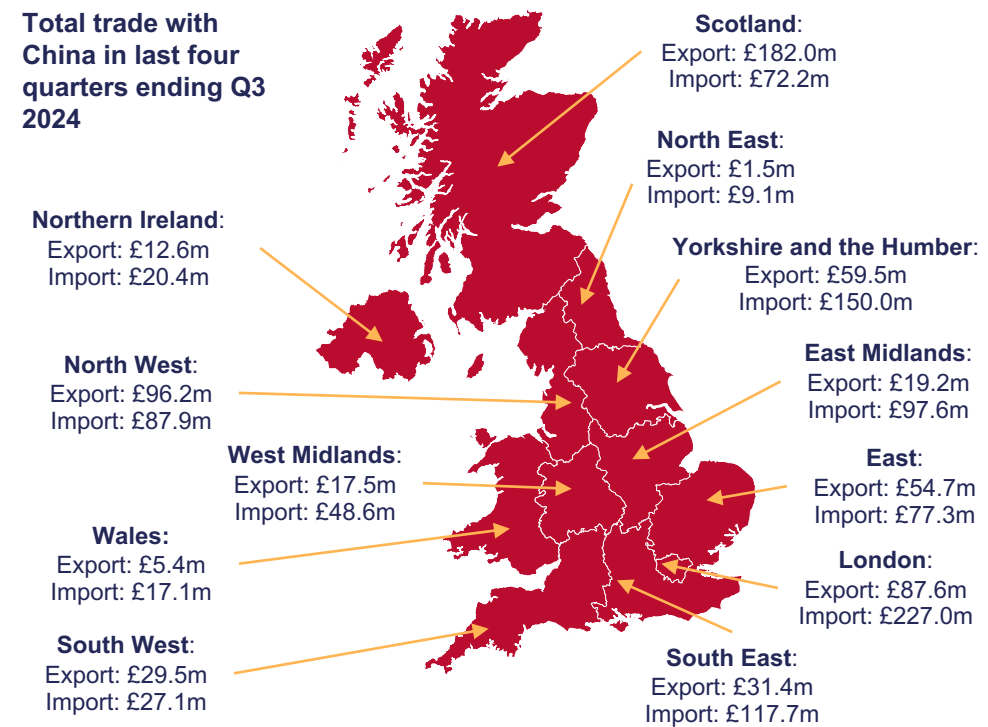
China had the third highest failed safety checks, with 39 **rejections** over 2024. This is only behind India and Nigeria.



28% of these border notifications were for tea products, which now require laboratory sampling and a health certificate.

REGIONAL FOOD AND DRINK EXPORTS

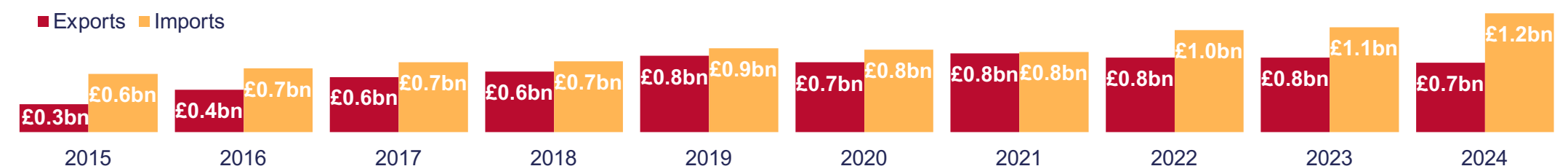
Total trade with China in last four quarters ending Q3 2024



TOP TEN EXPORTS			
	2024	Value change 2023 - 24	Volume change 2023 - 24
Whisky	£163.1m	-31.2%	-0.7%
Pork	£162.0m	-9.6%	7.0%
Food preparations	£85.3m	1.0%	N/A
Salmon	£76.3m	58.5%	97.5%
Malt extracts	£52.2m	3.1%	4.8%
Infant food	£26.0m	80.2%	17.0%
Protein concentrates	£21.4m	97.9%	18.0%
Beer	£21.1m	47.0%	45.8%
Shellfish	£20.2m	-10.5%	-8.4%
Fish	£16.7m	8.0%	66.8%

TOP TEN IMPORTS			
	2024	Value change 2023 - 24	Volume change 2023 - 24
Fish	£246.4m	-6.0%	6.8%
Poultry	£120.4m	28.1%	36.6%
Vegetables	£86.5m	17.1%	N/A
Food preparations	£59.9m	43.0%	N/A
Confectionery	£55.4m	19.9%	22.5%
Pasta	£48.4m	21.9%	18.4%
Spices	£45.9m	3.9%	26.8%
Prepared vegetables	£40.8m	9.4%	N/A
Honey	£37.4m	11.4%	20.6%
Oilseeds	£31.8m	31.4%	61.2%

FOOD AND DRINK TRADE



## CANADA & MEXICO



- Canada and Mexico are the only CPTPP members yet to ratify UK accession. Mexico will soon complete the process with a timeline for Canada yet to be confirmed.
- Trade with Canada has increased, with both exports and imports increasing moderately year-on-year. In contrast, Mexico has seen a more significant decline in trade, with exports down 12.5%, and imports down 16.5%.
- Beef exports to Canada have increased by 154%, with cereals (49.4%) and tea (19.1%) performing well. On imports, the UK sourced a higher number of Canadian oilseeds and salmon.
- Whisky and spirits make up a significant proportion of the UK's food and drink exports to Mexico. Moreover, malt extracts and coffee are top export products, with the latter benefitting from a reduced CPTPP tariff once Mexico ratifies the agreement.
- UK manufacturers will benefit from more flexible rules of origin, enabling businesses to source inputs from any member nation while still qualifying for preferential tariffs.
- Canada and Mexico face an uncertain trade environment with the USA. From Canada, vulnerable sectors include cereals prep and animal/veg oils. From Mexico, beverages and fruit & nuts are the top exports to the USA. Retaliatory tariffs will also have an impact.

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

### CANADA FOOD AND DRINK TRADE

	2024	2023	Change 2023 - 24
Exports	£401.7m	£389.9m	3.0%
Imports	£663.8m	£658.0m	0.9%
Trade Balance	£-262.1m	£-268.0m	2.2%

### PRODUCT TRADE WITH CANADA

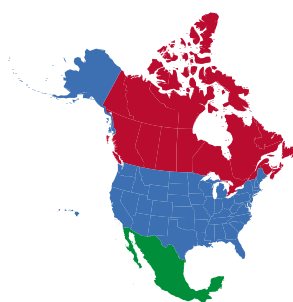
Top Exports		Value Change	Top Imports		Value Change
Whisky	£102.5m	-4.7%	Wheat	£150.3m	-23.7%
Beer	£34.1m	14.4%	Cereal grains	£111.3m	2.4%
Beef	£26.1m	154%	Pulses	£76.6m	-5.4%
Chocolate	£24.4m	4.9%	Oilseeds	£63.3m	217%
Gin	£21.1m	6.2%	Shellfish	£50.8m	18.6%
Sweet biscuits	£19.8m	16.5%	Salmon	£38.1m	95.7%
Tea	£16.5m	19.1%	Savoury snack	£34.0m	-21.3%
Cheese	£14.3m	-25.5%	Sugars	£23.8m	30.5%
Food prep	£14.2m	21.2%	Fish	£12.7m	-12.1%
Cereals	£12.7m	49.4%	Food prep	£9.2m	16.7%

### TRADE WITH THE USA

Canada to USA:		USA to Mexico:	
Food and drink	£33.3bn	Food and drink	£23.3bn
Cereals prep	£5.4bn	Cereals	£5.7bn
Animal & veg oils	£4.0bn	Meat	£3.8bn
Meat	£3.1bn	Oil seeds	£2.3bn

USA to Canada:		Mexico to USA:	
Food and drink	£21.2bn	Food and drink	£37.9bn
Food prep	£2.5bn	Beverages	£10.3bn
Cereals prep	£2.5bn	Fruit & nuts	£8.7bn
Beverages	£2.4bn	Vegetables	£8.0bn



### MEXICO FOOD AND DRINK TRADE

	2024	2023	Change 2023 - 24
Exports	£117.6m	£134.3m	-12.5%
Imports	£127.1m	£152.1m	-16.5%
Trade Balance	£-17.8m	£-9.5m	9.7%

### PRODUCT TRADE WITH MEXICO

Top Exports		Value Change	Top Imports		Value Change
Whisky	£89.4m	-21.7%	Spirits	£42.9m	-40.2%
Spirits	£8.1m	1212%	Fruits	£13.1m	0.0%
Malt extracts	£4.0m	21.6%	Vegetables	£12.7m	0.0%
Coffee	£2.2m	-30.6%	Coffee	£9.9m	0.7%
Gin	£2.0m	-60.9%	Sauces	£7.8m	15.6%
Ice cream	£1.7m	59.6%	Prepared fruit	£7.8m	-3.6%
Prepared veg	£1.5m	76.0%	Vegetable oils	£6.6m	-25.3%
Food prep	£1.3m	89.3%	Jam & spreads	£5.6m	10.8%
Beer	£1.1m	24.9%	Honey	£5.5m	8.0%
Prepared fruit	£0.6m	126%	Prepared veg	£5.1m	34.8%

### MEXICO EXPORT OPPORTUNITIES



Coffee

2024 value **£2.2m**  
Current Tariff **45%**  
CPTPP Tariff **36%**



Prepared pork

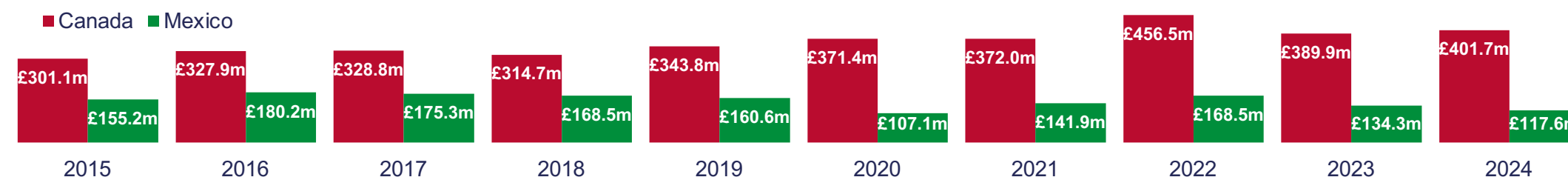
2024 value **£0.2m**  
Current Tariff **20%**  
CPTPP Tariff **0%**



Chocolate

2024 value **£0.2m**  
Current Tariff **25%**  
CPTPP Tariff **0%**

### FOOD AND DRINK EXPORTS







The Food & Drink Federation (FDF) is the voice of the food and drink manufacturing industry – the UK's largest manufacturing sector.

We contribute over £38 billion to the country's economy, supporting half a million jobs in every region and nation, and producing products that are loved in the UK and beyond.

Find out more about our latest news and the work we do at:

[FDF.org.uk](https://www.fdf.org.uk)

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[LinkedIn](https://www.linkedin.com/company/fdf)