

Powering communities across our nation





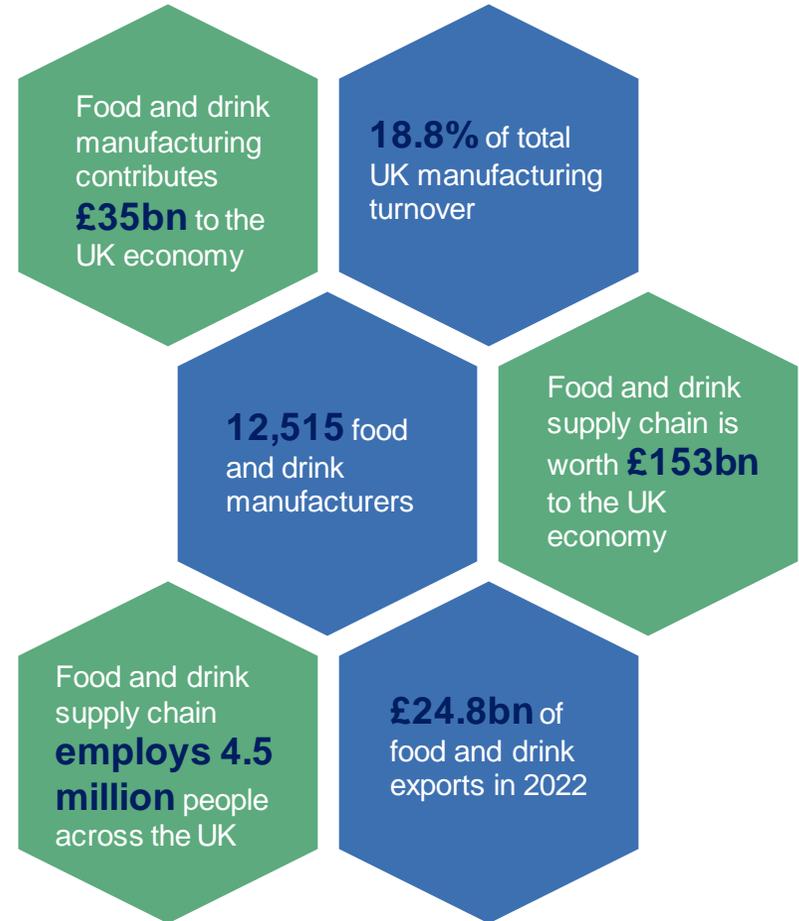
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Executive Summary

This report highlights the strong and resourceful story of our industry - with manufacturing sites in communities right across the UK, supporting nearly half a million people with good jobs and great careers and adding £35 billion to the UK economy. From factory kitchens to family businesses, our brands stand for quality and boast centuries of expertise, providing nutritious, delicious and safe products for everyone at all budgets.

The data in this report demonstrates the resilience of our industry, at a time when manufacturers have faced several challenges over recent years, from Brexit, Covid-19, extreme weather and the ongoing war in Ukraine. Each region and nation of the UK has played a vital role in ensuring food & drink is enjoyed by consumers at home and exported around the world, helping to power communities in all four corners of the UK.



Report compiled by
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 Economic Analyst
 FDF



UNITED KINGDOM

Food and drink is the United Kingdom's biggest manufacturing sector

GVA £35.0bn
▲ 7.7%

Exports £24.8bn
▲ 22.7%

Employment 472,000
▲ 3.5%

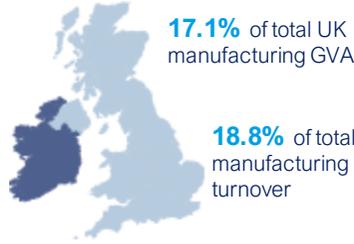
Businesses 12,515
▲ 0.4%

**FOOD & DRINK
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Source: ONS
All figures use the latest available data
2023: Business and Wages
2022: Exports and Employment
2021: GVA

The United Kingdom **delivers:**



Top three sectors by **Gross Value Added:**



GVA* grew **29.8%** since 2011

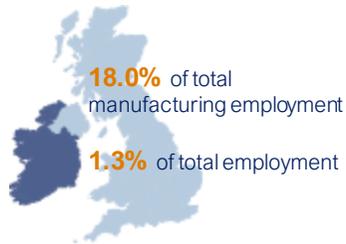


*Real GVA, index, 2019 = 100

GVA & Turnover

Employment

In the United Kingdom, food and drink **manufacturing** makes up:



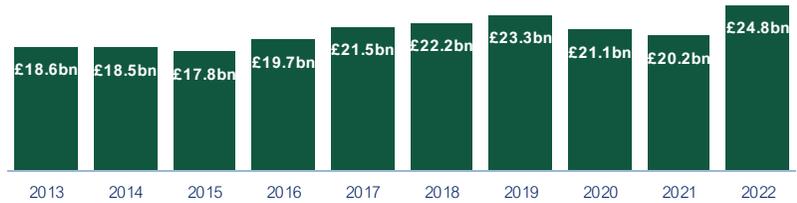
Top five sectors by **employment:**



We added **38,500** jobs since 2015



Top markets by value



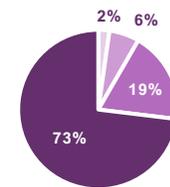
Exports

Businesses

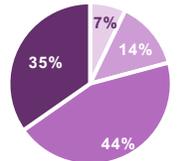
Top five sectors by number of **businesses:**



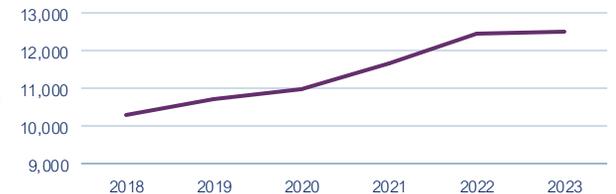
Percent of businesses by **employment:**



Percent of businesses by **turnover:**



Number of businesses grew **21.4%** between 2018 and 2023



The Agri-Food Supply Chain



The UK's 12,515 food and drink manufacturers sit at the heart of a food and drink supply chain which is worth £153bn to the economy and employs almost 4.5 million people.

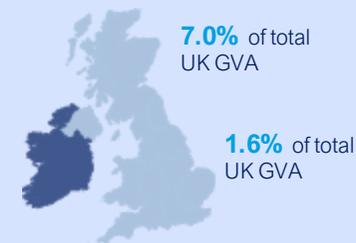
The food and drink industry is the UK's largest manufacturing sector, and forms part of a diverse and complex supply chain.

GVA	£153.3bn
Employment	4,477,500
Businesses	377,360
Exports	£24.8bn
Imports	£669bn



Agri-food chain

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:



EAST OF ENGLAND

Food and drink is the East of England's biggest manufacturing sector

GVA **£2.5bn**
▲ 2.3%

Exports **£1.5bn**
▲ 20.8%

Employment **37,000**
▼ 1.3%

Businesses **1,000**
▲ 1.5%

In the region, food and drink **manufacturing** accounts for:

13.4% of total manufacturing GVA

21.5% of total manufacturing turnover

The East of England **delivers:**



8.8% of total UK food and drink manufacturing GVA

9.2% of total UK food and drink manufacturing turnover

GVA* grew **19.2%** since 2011



*Real GVA, index, 2019 = 100

GVA & Turnover

Employment

Exports

Top markets by value



£367m
▲ 47.1%



£192m
▼ 3.6%



£178m
▲ 35.7%

Ireland **£67m**



China **£69m**



Ireland **£37m**



Spain **£59m**



France **£26m**



Netherlands **£23m**



Netherlands **£47m**



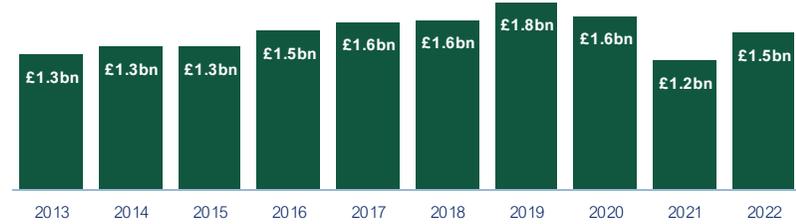
Ireland **£17m**



Spain **£18m**



£1.5bn of exports
6.2% of total UK F&D exports



FOOD & DRINK POWERS OUR NATION



In the East of England, food and drink **manufacturing** makes up:

17.7% of total manufacturing employment

1.3% of total employment

Top five sectors by **employment:**

- Meat **11,500**
- Bread and pastry **6,000**
- Fruit and vegetable juices **3,000**
- Prepared meals **1,750**
- Other food products **1,750**

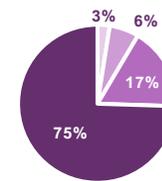
We added **6,000** jobs since 2016



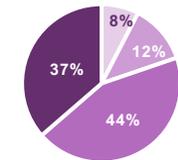
Top five sectors by number of **businesses:**

- Bread and pastry **230**
- Beer **110**
- Meat **100**
- Other food products **85**
- Fruit and vegetable juices **55**

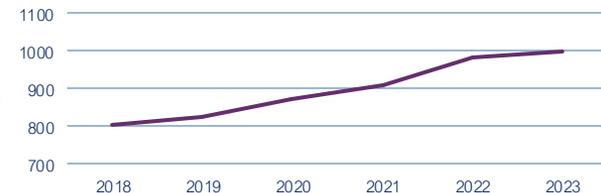
Percent of businesses by **employment:**



Percent of businesses by **turnover:**



Number of businesses grew **24.2%** between 2018 and 2023



Source: ONS
All figures use the latest available data
2023: Business
2022: Exports, Employment and Wages
2021: GVA

EAST OF ENGLAND

Food and drink is the East of England's biggest employer in the manufacturing sector

GVA **£2.5bn**
▲ 2.3%

Exports **£1.5bn**
▲ 20.8%

Employment **37,000**
▼ 1.3%

Businesses **1,000**
▲ 1.5%

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Source: ONS
All figures use the latest available data
2023: Business
2022: Exports, Employment and Wages
2021: GVA

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

Food and drink is London's biggest manufacturing sector

GVA	£2.6bn ▲ 0.6%
Exports	£2.9bn ▲ 19.1%
Employment	37,000 ▼ 9.8%
Businesses	2,020 ▲ 0.2%

In the region, food and drink **manufacturing** accounts for:



London **delivers:**



GVA* grew **47.2%** since 2011



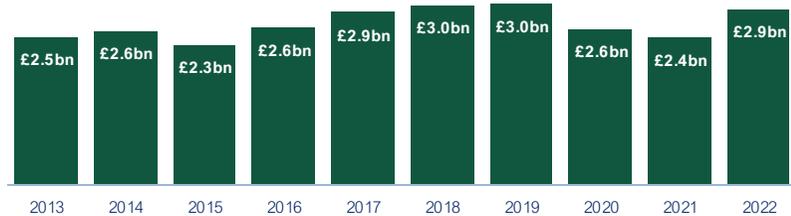
*Real GVA, index, 2019 = 100

GVA & Turnover

Employment

Exports

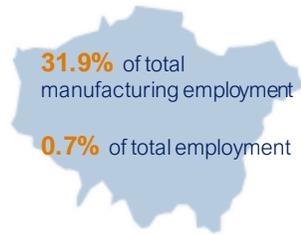
Top markets by value



FOOD & DRINK POWERS OUR NATION



In London, food and drink **manufacturing** makes up:



Top five sectors by **employment**:

Bread and pastry	9,000
Prepared meals	6,000
Other food products	5,000
Soft drinks	3,000
Fruit and vegetable juices	2,500

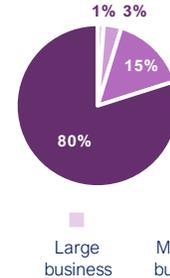
We added **10,750** jobs since 2016



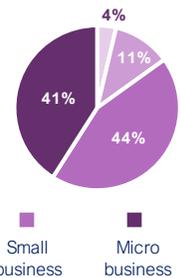
Top five sectors by number of **businesses**:

Bread and pastry	565
Other food products	290
Beer	125
Meat	125
Spirits	110

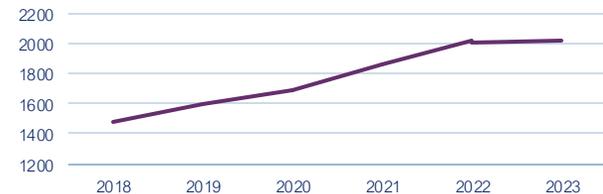
Percent of businesses by **employment**:



Percent of businesses by **turnover**:



Number of businesses grew **36.0%** between 2018 and 2023



Source: ONS
All figures use the latest available data
2023: Business and Wages
2022: Exports and Employment
2021: GVA

LONDON

Food and drink is London's biggest employer in the manufacturing sector

GVA	£2.6bn ▲ 0.6%
Exports	£2.9bn ▲ 19.1%
Employment	37,000 ▼ 9.8%
Businesses	2,020 ▲ 0.2%

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Source: ONS
All figures use the latest available data
2023: Business and Wages
2022: Exports and Employment
2021: GVA

TATE & LYLE SUGARS



Tate & Lyle Sugars is a cane sugar refiner, producing over 650 different products on-site, including **Lyle's Golden Syrup** – an iconic British staple. Our products are sold to consumers globally, specializing in unique sugars and functional ingredients.

Tate & Lyle Sugars has been refining cane sugar at our Silvertown site in East London since 1878. With a commitment to building economic and social wealth in our community, we have employed **850 people** in skilled roles, and are an accredited London Living Wage Employer.

Over the next few years, we are looking to expand key areas such as reformulation of products, for example, sugar production has halved at the refinery since 2010. To create innovative and **recyclable packaging** is also an essential goal for the company, currently 94% of our consumer packaging is already recyclable but we are now working towards ensuring that 100% of our packaging found in customers' homes will be recyclable by 2025.

With further investment planned for decarbonisation, our aim is to be carbon neutral by 2040, reaching **net zero by 2050**. To do this, we are now exploring and investing in new technologies to help the refinery decarbonize, including carbon capture as well as fuel-switching to renewables like hydrogen.

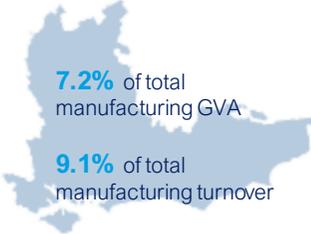


SOUTH EAST

Food and drink manufacturing GVA is up 28.4% in the South East since 2015

GVA	£1.8bn ▲ 0.3%
Exports	£1.3bn ▲ 21.6%
Employment	33,000 ▲ 32.0%
Businesses	1,425 ▼ 0.3%

In the region, food and drink **manufacturing** accounts for:



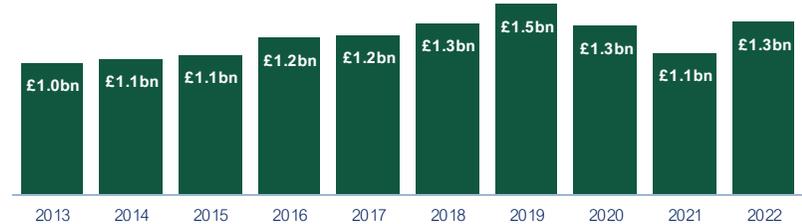
The South East **delivers**:



GVA* grew **28.4%** since 2015



Top markets by value



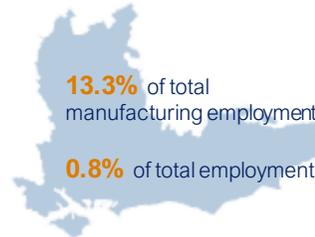
GVA & Turnover

Exports

Employment

Businesses

In the South East, food and drink **manufacturing** makes up:



Top five sectors by **employment**:

Bread and pastry		8,000
Fruit and vegetable juices		4,000
Other food products		3,500
Meat		2,750
Chocolate		2,250

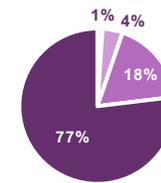
We added **11,000** jobs since 2020



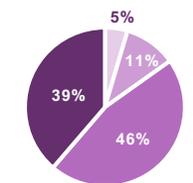
Top five sectors by number of **businesses**:

Bread and pastry		355
Beer		190
Other food products		130
Spirits		95
Meat		90

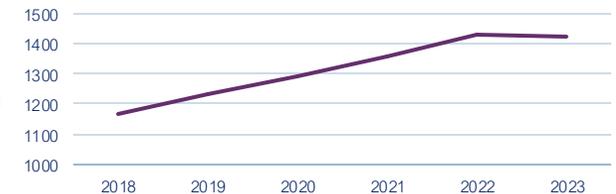
Percent of businesses by **employment**:



Percent of businesses by **turnover**:



Number of businesses grew **22.3%** between 2018 and 2023



FOOD & DRINK POWERS OUR NATION



Source: ONS
All figures use the latest available data
2023: Business and Wages
2022: Exports and Employment
2021: GVA

SOUTH EAST

Food and drink manufacturing has created 11,000 jobs in the South East since 2020

GVA £1.8bn
▲ 0.3%

Exports £1.3bn
▲ 21.6%

Employment 33,000
▲ 32.0%

Businesses 1,425
▼ 0.3%

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Source: ONS
All figures use the latest available data
2023: Business and Wages
2022: Exports and Employment
2021: GVA



Premier Foods' Ashford site employs roughly 400 people, operating 17 production lines which product over **300 different products**, including *Batchelors* instant soups and savoury products, *Saxa* salt and pepper, *Bisto* gravies and sauces, *Paxo* stuffing, *Bird's* instant custard, *Angel Delight*, *McDougall's* jelly, *Mr Kipling* and *Cadbury's* flour-based mixes. £30 million has been invested in the site since 2007, including automated and smart packaging lines, and new sprinkler system.

The site has been **integral** to the development of new and reformulated products. This activity includes the introduction of plant-based Pasta N Sauce sachet - low in fat, no artificial preservatives, no added Monosodium Glutamate (MSG), the removal of MSG in *Batchelors* Soup Range, and the introduction of *Angel Delight* non-HFSS compliant recipes. Premier Foods plans to upgrade the Soup and Savouries filling lines in 2024/25.

MARS WRIGLEY

Slough has been at the heart of Mars' business ever since the first Mars bar was produced in the town over 90 years ago. Today, Mars produces more than three million bars a day – including iconic items like the Mars, Snickers and Galaxy bars. Employing 1200 associates, our Slough factory is the **second-largest** confectionery factory in Europe.

Mars continues to make multimillion-pound investments in Slough, focused on boosting the productive capacity of its plant and the sustainability of its operations. This has included recent upgrades to the lines producing Maltesers, Snickers and Mars. Like all of Mars' UK sites, its Slough factory and office are **100% powered by renewable energy**. Mars has invested in packaging innovations that have reduced plastic use by 647,000 square metres a year - the equivalent area of over 90 football pitches. The Mars bar has also been certified as carbon neutral, and Mars is currently trialling recyclable paper packaging for Mars bars.



SOUTH WEST

Food and drink manufacturing GVA is up 42.5% in the South West since 2017

GVA	£2.0bn ▲ 2.1%
Exports	£0.9bn ▲ 19.5%
Employment	32,000 ▼ 8.6%
Businesses	1,235 ▼ 0.8%

In the region, food and drink **manufacturing** accounts for:

12.7% of total manufacturing GVA

20.1% of total manufacturing turnover

The South West **delivers**:

7.0% of total UK food and drink manufacturing GVA

7.2% of the UK's food and drink manufacturing turnover



*Real GVA, index, 2019 = 100

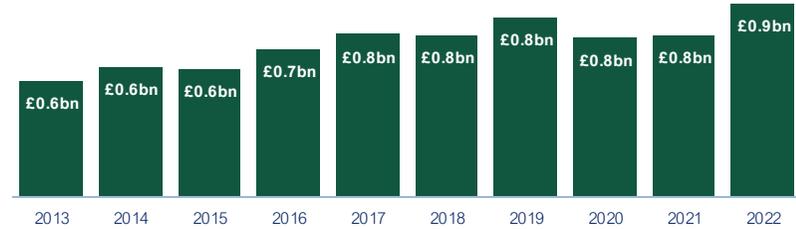
GVA & Turnover

Employment

Top markets by value

Dairy	£220m ▲ 22.7%	USA £50m	France £29m	Netherlands £25m
Meat	£137m ▲ 26.7%	France £54m	Ireland £24m	Netherlands £13m
Fish	£135m ▲ 26.9%	France £67m	Spain £16m	Italy £11m

£0.9bn of exports
3.9% of total UK F&D exports



Exports

Businesses

FOOD & DRINK POWERS OUR NATION

In the South West, food and drink **manufacturing** makes up:

14.7% of total manufacturing employment

1.2% of total employment

Top five sectors by **employment**:

Bread and pastry		4,500
Meat		3,750
Other food products		2,500
Beer		2,500
Milk and cream		2,250

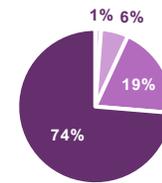
We added **2,500** jobs since 2020



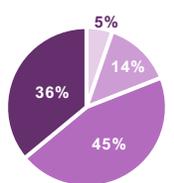
Top five sectors by number of **businesses**:

Bread and pastry		240
Beer		155
Spirits		110
Other food products		105
Meat		90

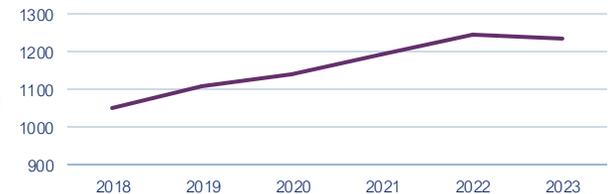
Percent of businesses by **employment**:



Percent of businesses by **turnover**:



Number of businesses grew **17.6%** between 2018 and 2023



Source: ONS
All figures use the latest available data
2023: Business and Wages
2022: Exports and Employment
2021: GVA

SOUTH WEST

Food and drink manufacturing has created 2,500 new jobs in the South West since 2020

GVA **£2.0bn**
▲ 2.1%

Exports **£0.9bn**
▲ 19.5%

Employment **32,000**
▼ 8.6%

Businesses **1,235**
▼ 0.8%

**FOOD &
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Source: ONS
All figures use the latest available data
2023: Business and Wages
2022: Exports and Employment
2021: GVA

SUNTORY BEVERAGE & FOOD GB&I

Suntory Beverage & Food GB&I is one of the leading soft drinks businesses in the UK and Ireland. Its much-loved soft drinks brands include Lucozade Energy, Lucozade Sport, Ribena and Orangina. Their Coleford factory in the Forest of Dean is the beating heart of its operations, employing over 300 people and producing around **800 million drinks per year**. Famously, 90% of all blackcurrants grown in the UK are used in the production of Ribena.

Coleford is one of the largest Suntory owned factories in Europe, meaning it has a huge role to play in how the company 'grows for good'. In 2020, the company invested £13m in a state-of-the-art bottling line – which fills 55,000 bottles an hour and cuts energy and water to make a bottle by 40% – reducing the site's energy and water consumption as a whole by 4.4%. It also enables the company to create more lower sugar and non-HFSS drinks at pace – **all of SBF GB&I's drinks are non-HFSS** after significant reformulation and innovation investments over the past 10 years.

The site uses 100% renewable purchased energy, has two bore holes minimizing its impact on local resources, and is zero waste to landfill. Since 2015, the company has reduced its carbon footprint by over a quarter, so is on track for a 50% reduction by 2030 and **net zero across Scope 1, 2 and 3 by 2050**.



EAST MIDLANDS

Food and drink is the biggest manufacturing sector in the East Midlands

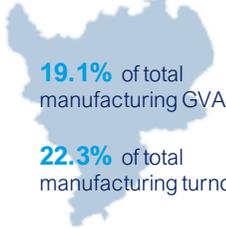
GVA £3.7bn
▼ 0.6%

Exports £1.0bn
▲ 20.8%

Employment 58,500
▲ 4.0%

Businesses 780
▼ 0.6%

In the region, food and drink **manufacturing** accounts for:



The East Midlands **delivers**:



GVA* grew **38.9%** since 2015



*Real GVA, index, 2019 = 100

GVA & Turnover

Employment

Exports

Businesses

In the East Midlands, food and drink **manufacturing** makes up:



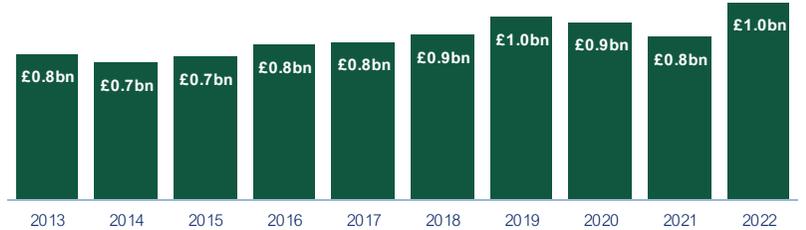
Top five sectors by **employment**:

- Meat: 13,500
- Other food products: 10,000
- Bread and pastry: 8,000
- Prepared meals: 5,000
- Fruit and vegetable juices: 5,000

The industry is the biggest **manufacturing** employer in the region



Top markets by value



FOOD & DRINK POWERS OUR NATION

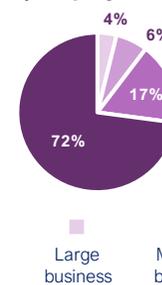


Source: ONS
All figures use the latest available data
2023: Business and Wages
2022: Exports and Employment
2021: GVA

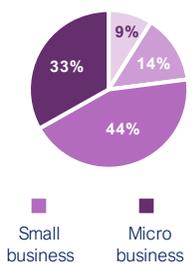
Top five sectors by number of **businesses**:

- Bread and pastry: 180
- Beer: 105
- Other food products: 80
- Meat: 75
- Spirits: 40

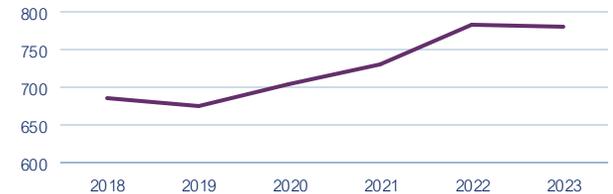
Percent of businesses by **employment**:



Percent of businesses by **turnover**:



Number of businesses grew **13.9%** between 2018 and 2023



EAST MIDLANDS

Food and drink is the East Midlands' biggest employer in the manufacturing sector

GVA	£3.7bn ▼ 0.6%
Exports	£1.0bn ▲ 20.8%
Employment	58,500 ▲ 4.0%
Businesses	780 ▼ 0.6%

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Source: ONS
All figures use the latest available data
2023: Business and Wages
2022: Exports and Employment
2021: GVA



Based in Northamptonshire since 1932, Weetabix Food Company is a local employer that is proud to contribute to both the national and the local economy and support community projects such as Magic Breakfast and Fareshare. We make Weetabix, the UK's number one selling, most trusted and most recommended cereal along with some of Britain's most famous and iconic brands including Weetabix Crispy Minis, Alpen, Weetabix On The Go Breakfast Drinks, Ready Brek, Weetos and Alpen bars. We make **70 million biscuits a week** so, it's safe to say that this keeps us pretty busy at our Northamptonshire mills! As well as featuring in over a third of British homes*, We export to 86 countries and have teams in the UK, Belgium, Madrid and Dubai – our biggest international brand is Weetabix.

Our Wheat Protocol means that we source our Weetabix Original wheat from farms within 50 miles of our mills and our Growers Group farmers, are as passionate & committed to the environment as we are. Sustainability is in our DNA and our strategy, the **Change for Better approach**, is split into four key workstreams that remain focussed on the main prize, which is for the Weetabix Food Company to have the biggest possible positive impact on our world, our business and our communities.



PEPSICO

PepsiCo's Walkers factory in Leicester was founded in 1948 and is one of the largest crisp factories in the world, employing over 1,200 employees across the site. It is at the forefront of innovation, investment and reformulation and in 2023 we announced a **£58 million investment into our Leicester site**, marking our biggest investment in the UK in the past 25 years. This brings the total invested into our UK manufacturing operations and supply chain to **£120 million since 2020**. The investment is split across three key areas designed to deliver sustainable growth, including new equipment to help cut greenhouse gas emissions and virgin plastic usage, an upgrade of facilities for our frontline workers and a new production line to increase capacity and enable the production of more Walkers snacks.

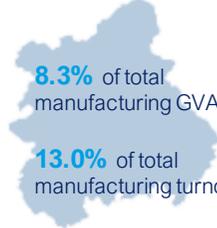
Our Leicester campus is also home to one of PepsiCo's six global R+D hubs. It's here that we've reformulated our existing product range and devised innovative, new products for the UK, some of which are then exported to markets around the world including Europe. In April 2022 our Walkers brand announced an industry-leading, new ambition to transform our UK portfolio. By 2025, our ambition is for **50% of our snacks sales to come from products that are non-HFSS or sold in portions of 100 calories or less**. To support this ambition, we made an initial investment of **£35 million over three years**, with our experts at our Leicester R+D hub leading the innovation.

WEST MIDLANDS

Food and drink manufacturing GVA is up 41.6% in the West Midlands since 2015

GVA	£1.7bn ▲ 5.0%
Exports	£0.9bn ▲ 5.9%
Employment	45,000 ▲ 40.6%
Businesses	985 ▲ 5.3%

In the region, food and drink **manufacturing** accounts for:



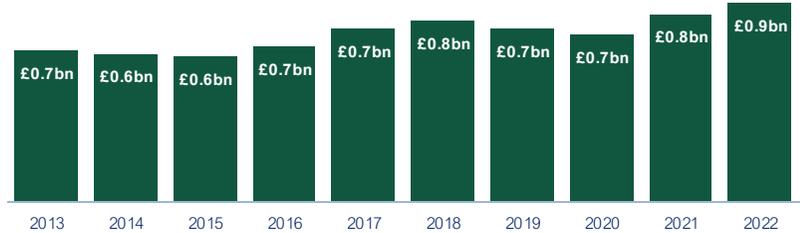
The West Midlands **delivers**:



GVA* grew **41.6%** since 2015



Top markets by value



GVA & Turnover

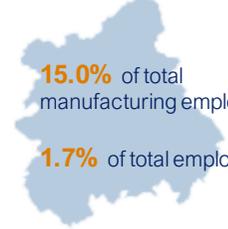
Exports

Employment

Businesses

FOOD & DRINK POWERS OUR NATION

In the West Midlands, food and drink **manufacturing** makes up:



Top five sectors by **employment**:



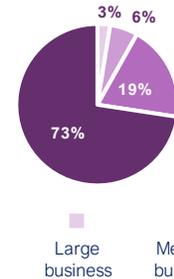
We added **13,000** jobs in the past year



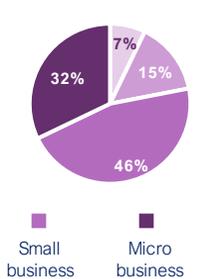
Top five sectors by number of **businesses**:



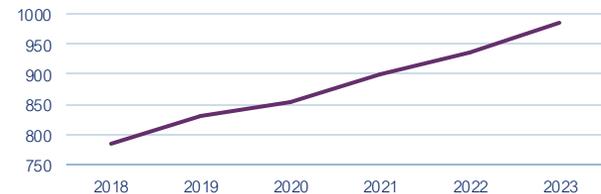
Percent of businesses by **employment**:



Percent of businesses by **turnover**:



Number of businesses grew **25.5%** between 2018 and 2023



Source: ONS
All figures use the latest available data
2023: Business and Wages
2022: Exports and Employment
2021: GVA

WEST MIDLANDS

Food and drink manufacturing has created 13,000 jobs in the West Midlands in the past year

GVA **£1.7bn**
▲ 5.0%

Exports **£0.9bn**
▲ 5.9%

Employment **45,000**
▲ 40.6%

Businesses **985**
▲ 5.3%

**FOOD &
DRINK
POWERS
OUR
NATION**



Source: ONS
All figures use the latest available data
2023: Business and Wages
2022: Exports and Employment
2021: GVA

Mondelēz
International



Mondelēz International's Bournville site has inspired and invested in a nation of chocolate lovers for nearly 200 years. Opened in 1879, the site now directly **employs 2804 people**, and indirectly supports a further 1,320 jobs in the local area. Each year, the site produces around 132,000 tonnes of chocolate.

Between 2012 and 2021, Mondelēz International **invested £272 million** into their UK manufacturing sites to modernise and increase their production capacity. This includes a recent £15 million investment in Bournville to create a new line capable of producing an additional 125 million large sharing bars of Cadbury Dairy Milk annually. The site can also produce 6 tonnes of Bournville Cadbury Roses and Heroes lines an hour, and technical upgrades have allowed for the production of a wider variety of Cadbury Buttons. In 2022, £121 million worth of exports were provided by the site. Mondelez International recently launched their first non-High in Fat Sugar or Salt (HFSS) chocolate product – Cadbury Dairy Milk Fruiter and Nuttier Trail mix.

BRITVIC
plc



In summer 2022, Britvic celebrated the 35th anniversary of its Rugby factory. Over the past 35 years, Rugby has become well known for showcasing some of the fastest and best manufacturing technology in Europe – producing much loved brands including Robinsons, Tango and Pepsi MAX. The site produces **3150 bottles and 9333 cans per minute**.

Based on Glebe Farm Industrial Estate, the site has seen over £138 million of investment since 2018, with the factory recently benefitting from a £13 million investment in its fifth state of the art canning line in March 2023, which took the site into the top five largest soft drinks manufacturing sites in Europe. Continued investment in the factory has seen the workforce increase at the site, bringing the total number of employees to more than 340 and reinforcing Britvic's commitment to the local community. Employees include engineering and team leader apprentices, with the Rugby site giving them **the perfect environment** to learn and grow within a leading manufacturing business.

The site uses automated goods vehicles that take away finished goods and supply empty pallets to the line. Each line has a stretch wrapper which wraps finished goods and case turners – robotic guides which turn the pack. The Rugby factory has also played a **key role** in Britvic's sustainability efforts. Continuous improvements have seen the factory cut the amount of water it uses – most recently by using the cooling water from its combined heat and power plant as a source of hot water for the site – helping Britvic work towards its net zero carbon emissions target.

YORKSHIRE AND THE HUMBER

Food and drink is Yorkshire and the Humber's biggest manufacturing sector

GVA **£3.3bn**
▼ 1.8%

Exports **£1.2bn**
▲ 14.8%

Employment **56,500**
▼ 6.6%

Businesses **1,040**
▲ 1.5%

In the region, food and drink **manufacturing** accounts for:

16.2% of total manufacturing GVA

22.1% of total manufacturing turnover

Yorkshire and the Humber **delivers**:

11.6% of total UK food and drink manufacturing GVA

14.3% of the UK's food and drink manufacturing turnover

GVA* grew **33.4%** since 2011



*Real GVA, index, 2019 = 100

GVA & Turnover

Employment

Exports

Businesses

In Yorkshire and the Humber, food and drink **manufacturing** makes up:

20.1% of total manufacturing employment

2.3% of total employment

Top five sectors by **employment**:

- Meat **16,000**
- Bread and pastry **10,000**
- Other food products* **6,000**
- Fish **4,000**
- Biscuits **2,000**

The industry is the biggest **manufacturing** employer in the region

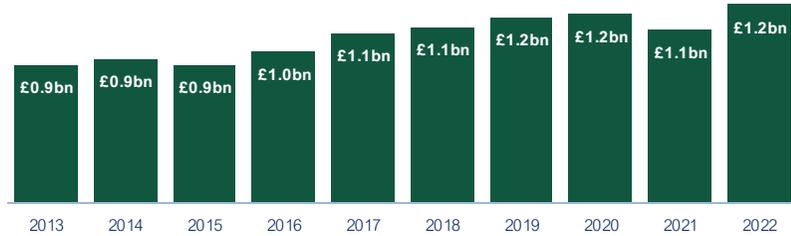


Top markets by value



£1.2bn of exports

5.3% of total UK F&D exports



FOOD & DRINK POWERS OUR NATION

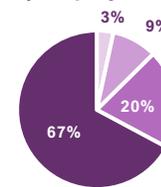


Source: ONS
All figures use the latest available data
2023: Business and Wages
2022: Exports and Employment
2021: GVA

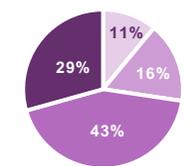
Top five sectors by number of **businesses**:

- Bread and pastry **235**
- Beer **145**
- Meat **105**
- Other food products **95**
- Spirits **55**

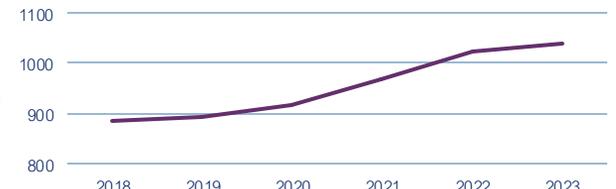
Percent of businesses by **employment**:



Percent of businesses by **turnover**:



Number of businesses grew **17.5%** between 2018 and 2023



YORKSHIRE AND THE HUMBER

Food and drink is Yorkshire and the Humber's biggest employer in the manufacturing sector

GVA £3.3bn
▼ 1.8%

Exports £1.2bn
▲ 14.8%

Employment 56,500
▼ 6.6%

Businesses 1,040
▲ 1.5%

**FOOD &
DRINK
POWERS
OUR
NATION**



Source: ONS
All figures use the latest available data
2023: Business and Wages
2022: Exports and Employment
2021: GVA

HARIBO



HARIBO is the UK's leading sweets manufacturer and one of **Yorkshire's largest employers**, situated across two production facilities in Pontefract and Castleford. At present, HARIBO has 600 skilled employees across its two sites with an additional 90 colleagues throughout its ten retail stores across the UK.

In 1972, HARIBO acquired a majority stake in Dunhills (Pontefract) in West Yorkshire and maintained Dunhills' traditional lines of fruit gums and liquorice products.

In 2015, HARIBO opened its new world-class manufacturing facility in Castleford, an investment worth £92m. The additional site, along with the existing facility in Pontefract, would enhance the company's production and set the foundations to support **future growth** within the UK. Six years later, HARIBO announced a further £22m investment into its Castleford site to deliver additional capacity and greater efficiency to meet the growing demand of its popular treats in the UK.

As for recent site investments, HARIBO reopened two production lines at their site in Pontefract to meet the growing demand for its products in 2023 and is set to install a new production and packing line in Castleford in 2025. At the beginning of 2024, HARIBO announced it has received planning approval for a new, purpose-built warehouse at its Castleford site, that will allow them to manage increased volumes of finished product, stock more raw materials and packaging, and will help safeguard 600 jobs across both our West Yorkshire sites.

As a responsible manufacturer, HARIBO has invested millions in reducing sugar throughout their products. Specifically, popular products such as Starmix and Tangfastics, are already **23%** and **18%** lower in sugar than their rivals. At its site in Yorkshire, HARIBO has invested and developed sugar-reduced products, introducing Fruitilicious, a best-selling reduced-sugar sweet in the market, which is available in different formats including portion-sized packs.

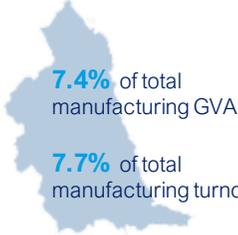
Currently HARIBO UK exports to the Netherlands, Belgium and Ireland.

NORTH EAST

Food and drink manufacturing GVA is up 25.2% in the North East since 2015

GVA	£0.6bn ▲ 5.5%
Exports	£0.3bn ▲ 7.0%
Employment	11,500 ▼ 1.7%
Businesses	315 ▼ 8.7%

In the region, food and drink **manufacturing** accounts for:



The North East **delivers:**



GVA* grew **25.2%** since 2015



GVA & Turnover

Employment

Top markets by value



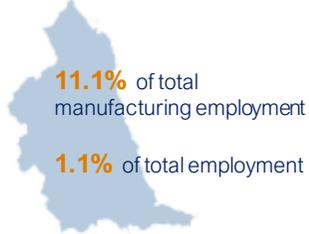
Exports

Businesses

FOOD & DRINK POWERS OUR NATION



In the North East, food and drink **manufacturing** makes up:



Top five sectors by **employment**:

Meat	5,050
Fish	800
Potatoes	600
Fruit and vegetable juices	600
Fruit & veg	600

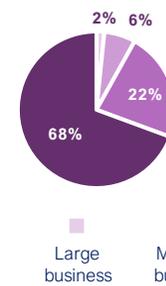
We added **800** jobs since 2017



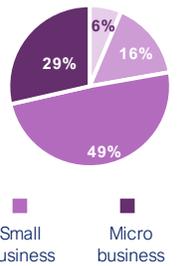
Top five sectors by number of **businesses**:

Bread and pastry	80
Beer	50
Other food products	30
Meat	25
Spirits	20

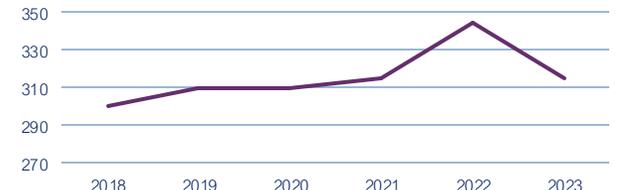
Percent of businesses by **employment**:



Percent of businesses by **turnover**:



Number of businesses grew **5.0%** between 2018 and 2023



Source: ONS
All figures use the latest available data
2023: Business and Wages
2022: Exports and Employment
2021: GVA

NORTH EAST

Exports of cereals from the North East have increased by 18.5% over the past year

GVA £0.6bn
▲ 5.5%

Exports £0.3bn
▲ 7.0%

Employment 11,500
▼ 1.7%

Businesses 315
▼ 8.7%

FOOD &
DRINK
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NATION



Source: ONS
All figures use the latest available data
2023: Business and Wages
2022: Exports and Employment
2021: GVA

KP Snacks

KP Snacks' Teesside site in Billingham is home of brands including McCoy's, Pom-Bear, Hula Hoops Puft and Discos, **producing 550,000 tonnes** of product per week. The site opened in 1969 and employs over 700 people. KP regularly invests in the site, focusing on efficiency and quality, new product development, infrastructure and facilities for our colleagues.

The factory first opened in 1969 and started producing Hula Hoops in 1971 before being later transferred to Ashby in 1982. The site started producing McCoy's in 1985 and in 1989 the factory was extended for snacks production, making brands such as Frisps and Discos. Wheat Crunchies were acquired from Golden Wonder in 2007. In 2014 **pellet production started**, allowing the site to produce brands such as Pom-Bear and Hula Hoops Puft.

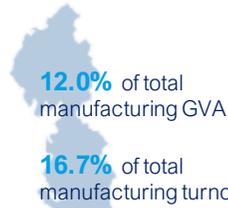


NORTH WEST

Food and drink manufacturing GVA is up 62.8% in the North West since 2015

GVA	£3.4bn ▲ 1.0%
Exports	£2.1bn ▲ 26.3%
Employment	60,500 ▲ 33.0%
Businesses	1,290 ▲ 1.2%

In the region, food and drink **manufacturing** accounts for:



North West **delivers:**



GVA* grew **60.3%** since 2011

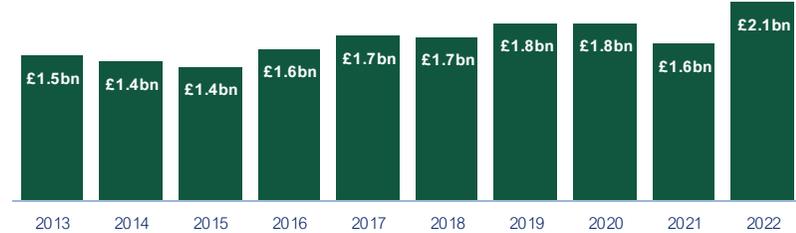


*Real GVA, index, 2019 = 100

GVA & Turnover

Employment

Top markets by value

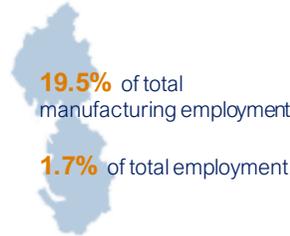


Exports

Businesses

FOOD & DRINK POWERS OUR NATION

In the North West, food and drink manufacturing accounted for:



Top five sectors by **employment:**

Bread and pastry	14,000
Meat	8,500
Biscuits	6,000
Prepared meals	6,000
Other food products	4,500

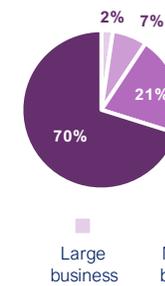
We added **15,000** jobs in the past year



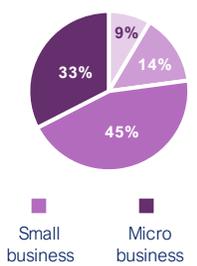
Top five sectors by number of **businesses:**

Bread and pastry	335
Meat	140
Beer	135
Other food products	120
Spirits	80

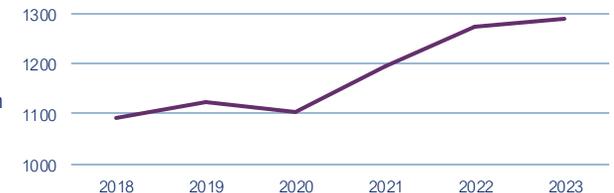
Percent of businesses by **employment:**



Percent of businesses by **turnover:**



Number of businesses grew **18.3%** between 2018 and 2023



Source: ONS
All figures use the latest available data
2023: Business and Wages
2022: Exports and Employment
2021: GVA

NORTH WEST

Food and drink is the North West's biggest employer in the manufacturing sector

GVA **£3.4bn**
▲ 1.0%

Exports **£2.1bn**
▲ 26.3%

Employment **60,500**
▲ 33.0%

Businesses **1,290**
▲ 1.2%

**FOOD &
DRINK
POWERS
OUR
NATION**



Source: ONS
All figures use the latest available data
2023: Business and Wages
2022: Exports and Employment
2021: GVA



The **Carr's brand** is almost 200 years old. It was established in 1831 by Jonathan Dodgson Carr. The factory was built over six years and opened in 1837 and the first ever Biscuit cutting machine was installed in 1841.

We're famously renowned for producing the Carr's Table Water Crackers which are traditionally baked in a brick kiln to ensure a thin and crispy texture. As part of his marketing and PR strategy, Jonathan Dodgson Carr supplied multiple expeditions with his Table Water biscuits, including the maiden voyage of the Titanic. The site itself is approximately 55,000 m² and **currently employs over 750 permanent employees with an average length of service of 14 years.**

We produce 246 products across 19 process lines, annually making some 84,000 tonnes of product.

In a day we produce:

- Approx. 330+ tonnes of product
- Use 220 tonnes of flour
- 1,600,000 packets of biscuits
- 7,000,000 Table Water biscuits
- 7,000,000 Ginger Nuts
- 6,000,000 Bourbons

In 2023 we invested in an extension of our warehouse to include 1,100 additional pallet spaces.



SCOTLAND

Food and drink is Scotland's biggest manufacturing sector

GVA	£4.2bn ▲ 10.0%
Exports	£7.4bn ▲ 29.6%
Employment	44,000 ▼ 8.3%
Businesses	1,250 ▼ 0.8%

In the nation, food and drink **manufacturing** accounts for:

26.6% of total manufacturing GVA

29.2% of total manufacturing turnover

Scotland **delivers:**

14.6% of total UK food and drink manufacturing GVA

10.8% of the UK's food and drink manufacturing turnover

GVA* grew **30.6%** since 2015



*Real GVA, index, 2019 = 100

GVA & Turnover

Employment

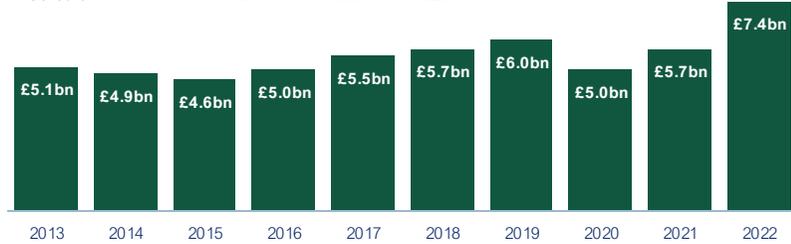
Exports

Top markets by value

Category	Market	Value	Change
Beverages	USA	£1,071m	▲ 36.6%
	France	£438m	
	Taiwan	£253m	
Fish	France	£624m	▲ 2.1%
	USA	£73m	
	Netherlands	£41m	
Cereals	USA	£40m	▲ 38.8%
	Ireland	£33m	
	Netherlands	£25m	

£7.4bn of exports

31.3% of total UK F&D exports



FOOD & DRINK POWERS OUR NATION



In Scotland, food and drink **manufacturing** makes up:

25.7% of total manufacturing employment

1.7% of total employment

Top five sectors by **employment:**

Spirits	7,000
Fish	7,000
Bread and pastry	5,800
Meat	4,000
Biscuits	

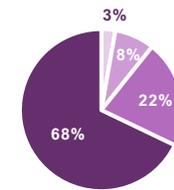
We added **2,000** jobs since 2016



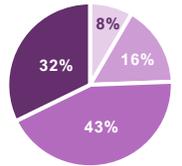
Top five sectors by number of **businesses:**

Bread and pastry	260
Spirits	245
Beer	125
Fish	110
Meat	100

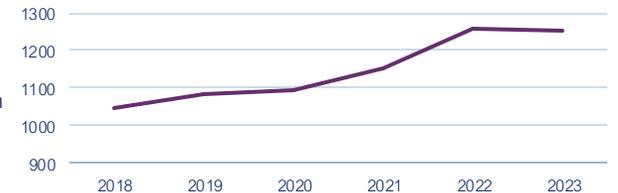
Percent of businesses by **employment:**



Percent of businesses by **turnover:**



Number of businesses grew **19.6%** between 2018 and 2023



Source: ONS
All figures use the latest available data
2023: Business and Wages
2022: Exports and Employment
2021: GVA

SCOTLAND

Food and drink is Scotland's biggest employer in the manufacturing sector

GVA	£4.2bn ▲ 10.0%
Exports	£7.4bn ▲ 29.6%
Employment	44,000 ▼ 8.3%
Businesses	1,250 ▼ 0.8%

**FOOD & DRINK
POWERS
OUR
NATION**



Source: ONS
All figures use the latest available data
2023: Business and Wages
2022: Exports and Employment
2021: GVA



Nairn's is the **largest producer of oatcakes** in the UK and one of the UK's leading and most trusted gluten free brands. Their range is made using the finest wholegrain oats supplied by farmers and millers in the Scottish Borders.

The business was founded in 1896 as a family-run village bakery in Strathaven, Lanarkshire. It now employs 220 people across two sites – one making their famous oatcakes and biscuits and the other making their gluten free range. Most recently the business has invested £4.5 million in their **state-of-the art** gluten free factory to increase production.

12% of Nairn's business currently comes from exports, and in 2022 Nairn's won a Queen's Award for Enterprise in International Trade. The business has seen **export growth of 600 per cent** over the last ten years, reaching £5 million export sales in this financial year. They export to more than 35 markets, including the Republic of Ireland, USA and Canada. Nairn's aims to achieve total sales of £50m within the next two years, accelerated by international sales growth.



The Nestlé factory at Girvan, South Ayrshire, makes chocolate milk crumb - a key ingredient which is integral for creating some of the nation's favourite chocolate confectionery products, and used at other Nestlé factories in the UK to make popular products such as **KitKat, Quality Street, Aero, and Yorkie**.

Approximately 25 thousand tonnes of milk crumb are produced at the site each year, **using 5 - 7% of all the milk** produced in Scotland each year.



Nestlé **employs 48 people** at the site: 33 are involved in production processes and craft, and 15 are managers and other staff. The milk is sourced from local farmers, Nestlé works with approximately [48 farmers](#) in Ayrshire – through the [FirstMilk](#) dairy cooperative – to source the high-quality milk for our products.

The **First Milk initiative** helps Nestlé to achieve its goal to lessen environmental impact by improving the sustainability and efficiency of the supply chain. Through the [Nestlé MilkPlan](#), each farmer receives a 'sustainability bonus' for taking practical measures that protect and enhance natural assets on their land and the adoption of regenerative farming techniques. First Milk farmers have enrolled in a programme that's aiming to reduce the carbon footprint of their operations by 50% by 2026. The factory has reduced the amount of total waste it sends to landfill to zero since 2010. Girvan's achievement of "zero waste to landfill" from June 2010 was audited and verified by independent auditors, Bureau Veritas*.

WALES

Wales has the UK's fastest food and drink manufacturing GVA growth since 2001

GVA £1.6bn
▲ 1.4%

Exports £0.7bn
▲ 24.2%

Employment 25,000
▲ 3.1%

Businesses 595
◀▶ 0.0%

In the nation, food and drink **manufacturing** accounts for:

13.4% of total manufacturing GVA

14.8% of total manufacturing turnover

Wales **delivers**:

5.6% of total UK food and drink manufacturing GVA

5.2% of the UK's food and drink manufacturing turnover

GVA* grew **70.6%** since 2011



*Real GVA, index, 2019 = 100

GVA & Turnover

Employment

Exports

Top markets by value



£197m
▲ 49.5%



£160m
▲ 15.6%



£138m
▲ 29.9%

France
£106m

Ireland
£41m

Belgium
£35m

Ireland
£36m

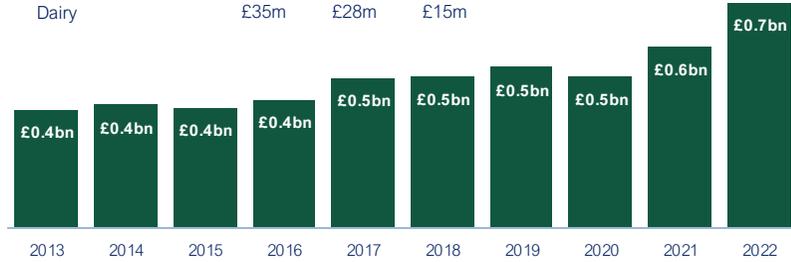
Belgium
£11m

Ireland
£28m

Belgium
£25m

Saudi Arabia
£11m

Netherlands
£15m



FOOD & DRINK POWERS OUR NATION



Source: ONS
All figures use the latest available data
2023: Business and Wages
2022: Exports and Employment
2021: GVA

In Wales, food and drink **manufacturing** makes up:

18.1% of total manufacturing employment

1.9% of total employment

Top five sectors by **employment**:

- Meat 5,250
- Bread and pastry 4,500
- Prepared meals 4,000
- Other food products 2,250
- Breakfast cereals 1,750

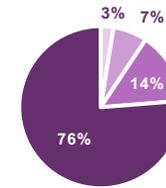
We added **5,750** jobs since 2016



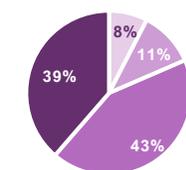
Top five sectors by number of **businesses**:

- Bread and pastry 145
- Beer 85
- Meat 55
- Other food products 50
- Spirits 35

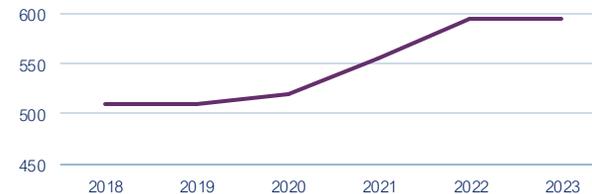
Percent of businesses by **employment**:



Percent of businesses by **turnover**:



Number of businesses grew **16.7%** between 2018 and 2023



WALES

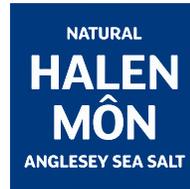
Food and drink is Wales' biggest employer in the manufacturing sector

GVA	£1.6bn ▲ 1.4%
Exports	£0.7bn ▲ 24.2%
Employment	25,000 ▲ 3.1%
Businesses	595 ◀▶ 0.0%

FOOD &
DRINK
POWERS
OUR
NATION



Source: ONS
All figures use the latest available data
2023: Business and Wages
2022: Exports and Employment
2021: GVA



Halen Môn specialises in interesting, unusual and delicious sea salt and seasonings that bring **depth and flavour to your cooking**. In 1997, we left a saucepan of seawater to boil on the Aga in our family kitchen and as the salt crystals started to form, we knew we'd struck culinary gold. We started supplying Halen Môn Sea Salt to Swains, our local butchers in Menai Bridge on the Isle of Anglesey.

Today, our **Welsh sea salt** is enjoyed around the world by chefs, food lovers and even Barack Obama. It has been served at the London 2012 Olympics, political summits and royal weddings and is a vital ingredient in Green & Blacks chocolate and Piper's Crisps.

Sea salt is where we started and our speciality: we make ours by hand from the seawater that surrounds the beautiful island of Anglesey. We also have a smokery where we make our **award-winning 'Smoked Water'** – a 100% natural condiment that brings depth to a huge range of foods. Our latest addition to the range is a gin distilled with Pure Sea Salt for a clean flavour as deep as the sea itself. We export to around 15 countries around the world, and our MD, Alison Lea-Wilson, was named an export champion for Wales in 2022.

We started our business because we love the landscape of Wales, and wanted to make our home here. It makes sense then that we look after it – and we have won the **Queen's Award for sustainability** in recognition of our commitment to being as green as we can.



NORTHERN IRELAND

Food and drink is Northern Ireland's biggest manufacturing sector

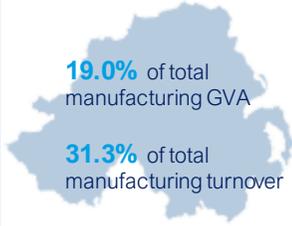
GVA	£1.2bn
	▼ 1.4%
Exports	£2.1bn
	▲ 27.6%
Employment	22,895
	▲ 1.6%
Businesses	575
	◀▶ 0.0%

FOOD & DRINK POWERS OUR NATION



Source: ONS
All figures use the latest available data
2023: Business and Wages
2022: Exports and Employment
2021: GVA

In the nation, food and drink **manufacturing** accounts for:



Northern Ireland **delivers**:



GVA* grew **15.4%** since 2017

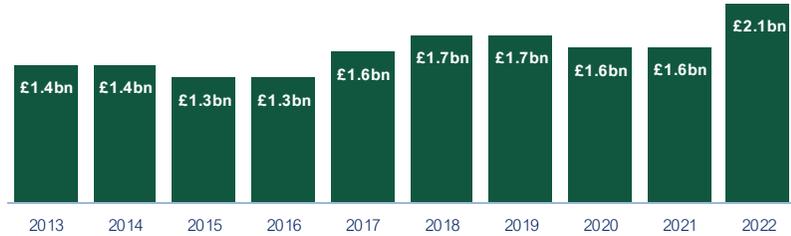


*Real GVA, index, 2019 = 100

GVA & Turnover

Employment

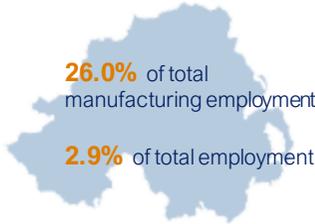
Top markets by value



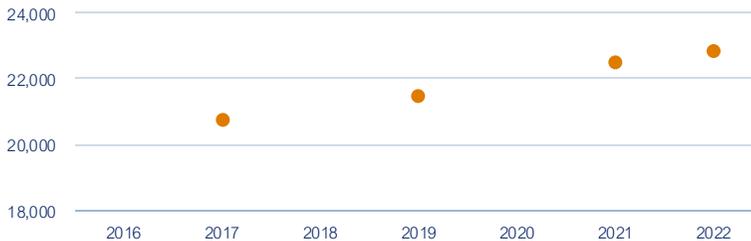
Exports

Businesses

In Northern Ireland, food and drink **manufacturing** makes up:



We added **2,119** jobs since 2016*

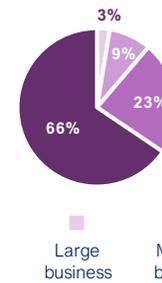


* Employment data not available in 2016, 2018, 2020

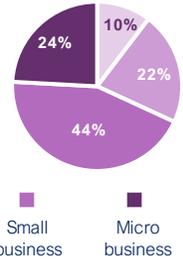
Top five sectors by number of **businesses**:

- Bread and pastry **145**
- Meat **65**
- Prepared feeds **55**
- Other food products **40**
- Fruit and vegetable juices **30**

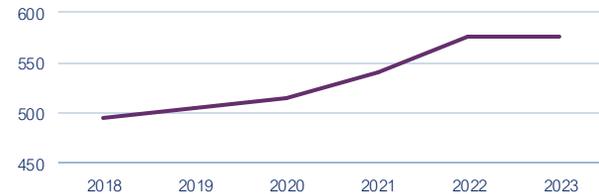
Percent of businesses by **employment**:



Percent of businesses by **turnover**:



Number of businesses grew **16.2%** between 2018 and 2023



Powering our nation into the next decade

Over the next ten years we intend to continue our ambitious work building a resilient, sustainable and growing food and drink manufacturing sector that supports the wider supply chain.

To do that, we need to partner with the next government to tackle the challenges of today and embrace the opportunities of tomorrow.

This is as much a challenge for government as it is for industry, so we must work together to drive change.

Find out more about our 2024 Manifesto at fdf.org.uk/manifesto

We want to partner with government to transform our food system to be:



fdf

**FOOD & DRINK
POWERS OUR NATION**



The Food and Drink Federation (FDF) is the voice of the food and drink manufacturing industry – the UK’s largest manufacturing sector. We contribute over £30 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 around the world. [Food and drink powers our nation.](#)

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

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

X: [@FoodanddrinkFed](#)

[Linkedin](#)

