

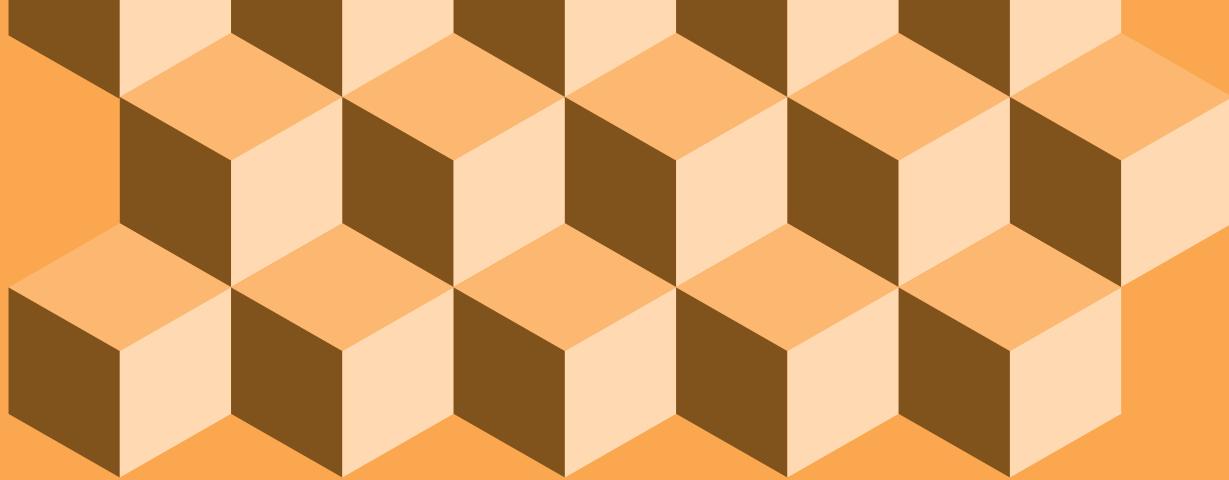
INTERNATIONAL TRADE TRENDS 2026

UK MANUFACTURERS IN GLOBAL MARKETS



CONTENTS

Introduction	3
Export intensity: How export-heavy are UK manufacturers?	4
Where are UK manufacturers exporting to, and how are these export markets performing?	6
Destinations	6
Manufacturers' market outlook	8
Sentiment for the year ahead	8
The Impacts of Trade Policy and the External Environment	10
Post-Brexit trade experience with the EU	11
Policy and the pressures of competition over the past five years	12
Britain's trade reputation and its service to manufacturers	13
Barriers, risk and global competition	14
Routes to Market and Growth Strategy	15
Exporting strategies for the future	16
Support for growth	19
Input sourcing geographies	20
Logistics in enabling trade	20
Conclusion	22
About	23



INTRODUCTION

The global trading environment for UK manufacturers feels uniquely unpredictable. Over the past decade businesses have endured overlapping waves of disruption, from the UK's exit from the EU and more recent geopolitical tensions to pandemic-related supply shocks and the ensuing energy market crisis.

Global value chains have changed structurally as a result, and now adaptation is no longer a discrete process, but rather a continuous activity UK manufacturers undertake to trade their way forwards in uncertain times.

Make UK has partnered with DHL to undertake this research in international trade from the perspective of UK manufacturers, including fieldwork from a representative sample for the sector of 119 exporting UK manufacturers. The objective of this research is to reveal just how UK manufacturers are navigating the rapidly evolving global trading environment by drawing directly on the experiences of the firms that participate in these markets.

The research sets out to explore three key themes, the scale and composition of export activity across the sector, the performance and subsequent outlook for UK goods destination markets and the practical and policy challenges which are steering businesses' international ambitions.

Together, the answers to the questions contained within these themes will offer an evidence-based understanding of how, and if, trade is acting as a driver of growth and resilience, and where competitiveness may be being eroded by trade barriers.

The commission of this research comes at a pivotal moment for the UK economy. As of the time of its undertaking, UK productivity growth is suppressed, domestic demand is inconsistent and exports continue to provide an indispensable contribution to the UK's economic trajectory.

Manufactured goods exports account for just under half the value of all UK exports. As both the Government and the sector seek to build longer-term stability into both the country and their firms respectively, the insight into the real world experience of exporting manufacturers will prove invaluable for industry, policymakers and wider stakeholders alike.

UK MANUFACTURING'S EXPORT FOOTPRINT AND OUTLOOK

EXPORT INTENSITY: HOW EXPORT-HEAVY ARE UK MANUFACTURERS?

As outlined, the quantitative fieldwork supporting this research exclusively included exporting manufacturers, to understand the international trade outlook for those UK businesses currently engaged in export. The fieldwork shows that, through a weighted average approach on survey data asking what percentage of annual sales export are, 33% of annual sales are related to export. In other words, showing that, for exporting manufacturers in the UK, approximately a third of revenue is generated from exports.

Understanding the proportion of revenue exposure to export markets for the sector at the outset of this research sets the scene for further discussion, related to policy and market access, amongst other things, about the international interconnectedness of the UK's manufacturing sector and the implications for global value chains.

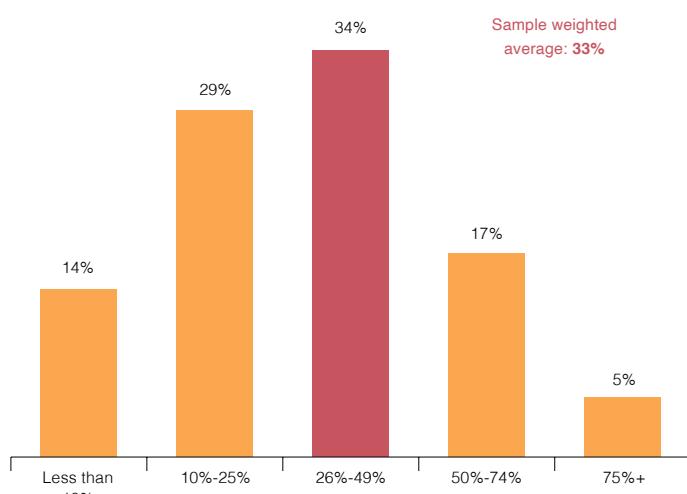
This data also shows that a sizeable minority see their business thrive through export, just under six in ten manufacturing exporters (56%) derive at least a quarter of their sales from exports, by assessing those in the data who lie above the 26%+ bands.

Further, an even more intensive grouping lies in the 50%+ band, with just over one in five (22%) reporting that the majority of their turnover is export related. This is an important finding on export exposure for the sector, that 22% of manufacturing exporters have the majority of their businesses dependent on overseas demand.

This finding demonstrates that there is a meaningful cohort of firms that are structurally dependent on the export market and that, for this group of firms, the export market is not treated as a source of 'overflow' demand.

Chart 1: Export prevalence

% of respondents indicating what proportion of their annual sales are related to goods exports



Source: Make UK/DHL International Trade Trends Survey 2025

1/5 OF INTERNATIONALLY TRADING MANUFACTURERS HAVE THE MAJORITY OF THEIR SALES ARISING FROM EXPORT



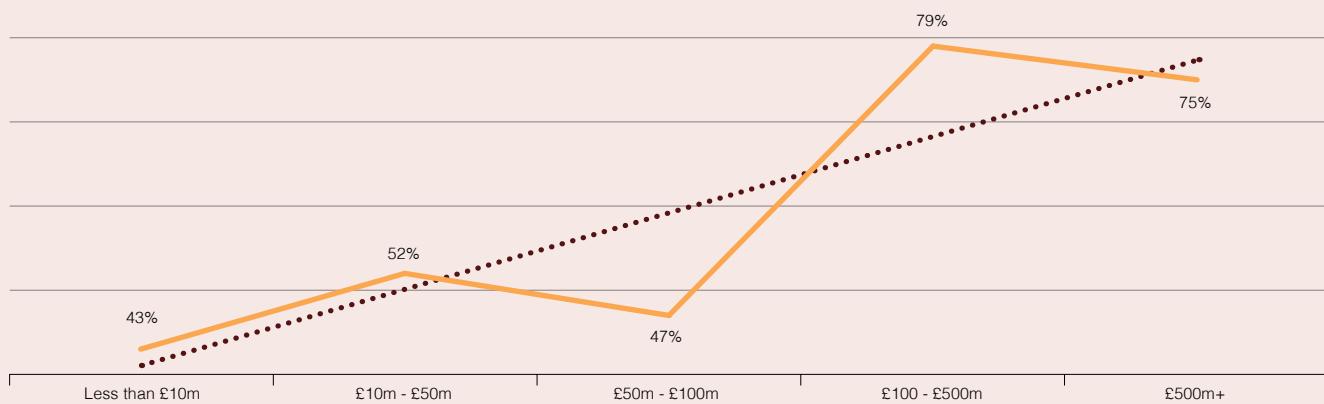
EXPORT INTENSITY CORRELATES WITH COMPANY SIZE

The findings reveal a strong correlation between firm size and export exposure. For smaller firms, those with a £10m or less turnover, only 43% report falling into the categories above 26% export sales. This rises to just over half (52%) for those £10m-£50m firms, and almost four in five (79%) for those firms within the £100-£500m band. In the largest band, £500m+, 75% of firms have at least of quarter of revenue arising from export.

This sample would indicate that export intensity generally scales with company size, with those manufacturers in the mid-to-large categories being more greatly embedded into global value chains, and by extension, these firms' prospects will be increasingly aligned with the global outlook in comparison to non-exporting domestic operators.

Chart 2: Export revenue proportion correlates to company size

Proportion of firms which generate more than 25% of turnover from export stratified by firm turnover band



Source: Make UK/DHL International Trade Trends Survey 2025

WHERE ARE UK MANUFACTURERS EXPORTING TO, AND HOW ARE THESE EXPORT MARKETS PERFORMING?

Destinations

European markets, as was the case before the UK left the EU, remain the core export destination. 82% of exporting manufacturers report exporting to the EU, confirming that the EU's Single Market is still the main recipient of UK-manufactured goods. A further 16% exports into the wider EEA, including Switzerland and Norway.

This export exposure to EU markets indicates that, despite the UK's exit from the EU, the importance of EU standards, rules and customs procedures remain of paramount importance for exporting UK manufacturers.

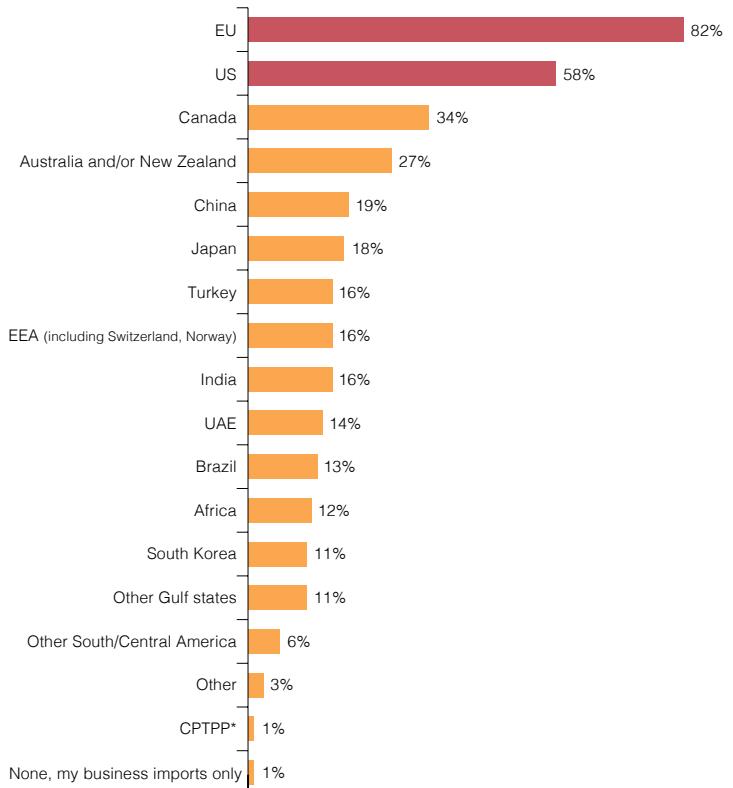
The US is the largest single country destination for UK-manufactured goods, and the second largest market overall, with 58% reporting to export there. A further 34% also export to Canada.

However, despite the top destinations surging ahead in terms of their prevalence as destination markets for UK exported goods, UK manufacturers are global in their reach, with more than 10% of the sector exporting into most markets across the world. Just over a quarter (27%) export to Australia and New Zealand, 13% to Brazil and 11% to South Korea, to name a few.

This global export exposure means that trade relationships, and subsequent negotiations, carry weight for the sector, even for those relationships that are lesser known such as with Indian and Gulf FTAs. Interestingly, respondents suggested there was little engagement with Comprehensive and Progressive Agreement for Trans-Pacific Partnership (CPTPP) markets as a bloc, even though many of those countries are separately represented on the list.

Chart 3: EU and US dominate export destination prevalence

% respondents indicating which markets their company exports to



*Comprehensive and Progressive Agreement for Trans-Pacific Partnership

Source: Make UK/DHL International Trade Trends Survey 2025

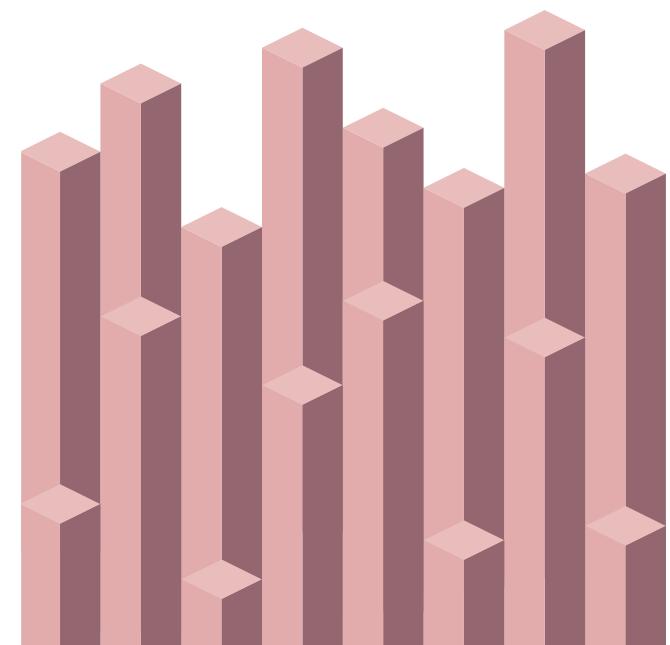
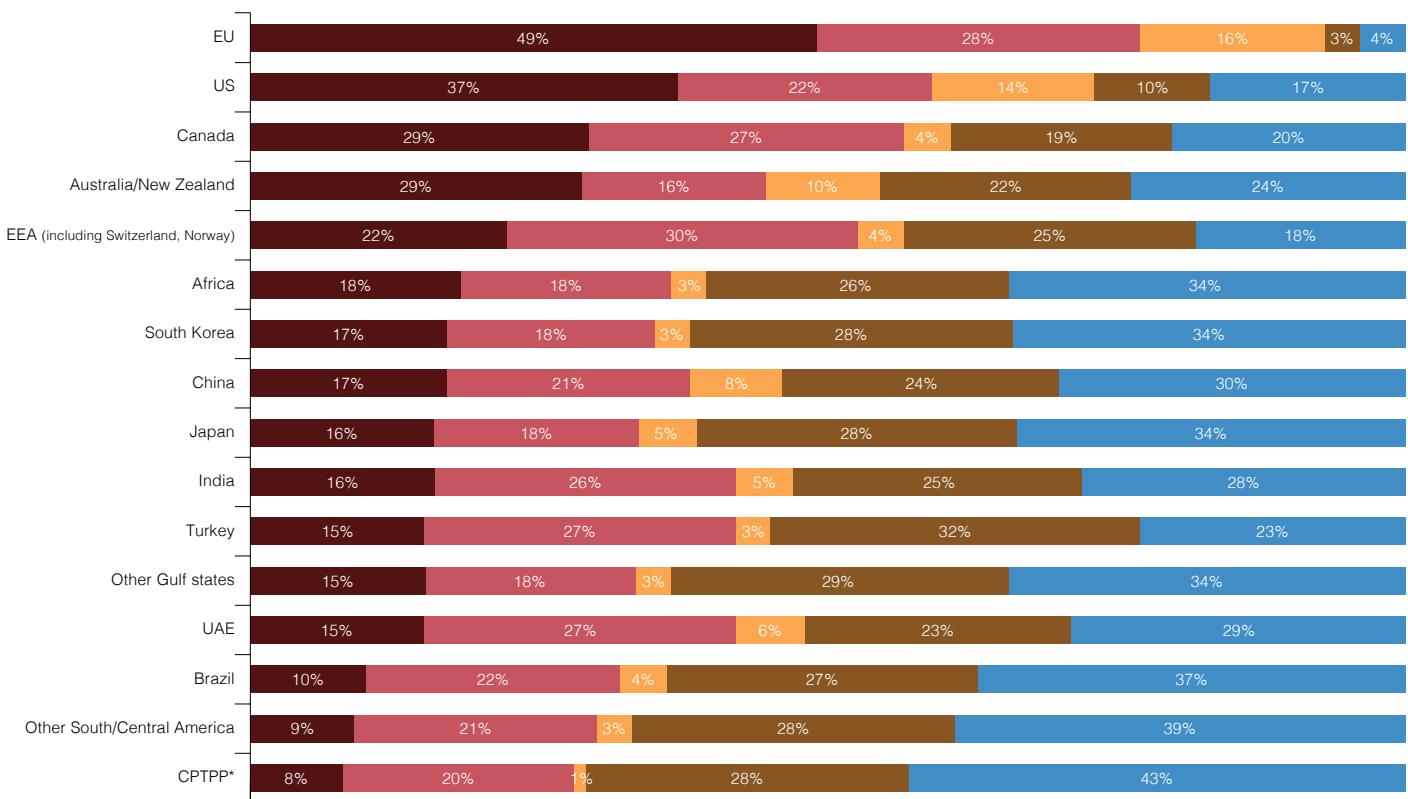


Chart 4: UK export market evolution since pre-COVID 2020 baseline

% respondents indicating how their export sales into markets have fared compared to five years ago

■ Increased ■ Remained the same ■ Decreased ■ Not selling into this market but considering ■ Not selling into this market and no plans to



*Comprehensive and Progressive Agreement for Trans-Pacific Partnership

Source: Make UK/DHL International Trade Trends Survey 2025

Performance compared to pre-COVID baseline

The large swathe of data contained in Chart 4 shows that exports to established '1st tier' trading partners have grown on balance since the pandemic's inception. In the case of the EU, 49% of the sample suggest that export sales are higher than they were five years ago, with 16% reporting lower sales over the same period, resulting in a net positive balance of +33%.

Similar is observed in the US, with a net positive balance between those seeing increased market sales against those seeing them decrease by +23%. The Canadian market has seen the largest net positive balance change since 2020, with a net positive balance figure for market sales expansion of +25%.

This data shows that, for these 1st tier export markets, despite the challenges presented by the pandemic and other trade dampeners in the past five years, on balance,

more within the UK's manufacturing sector have managed to grow their exports into these established markets than those which have seen their volumes decline. While the balance is positive, it has not been a universal experience of export growth to these 1st tier markets.

'Second tier' markets, such as Australia, New Zealand, the wider EEA, India and Japan, show net positive balance figures for market growth in most cases, however, much larger shares of firms have indicated that volumes have mostly remained the same.

There is a fairly long tail in the data for under-penetrated markets, as can be seen in the lower half of Chart 4, where far greater proportions of the sector suggest they fall into the categories of having no plans to sell into these markets, or are considering selling into these markets but have not yet done so.

Manufacturers' market outlook

Despite the quantitative research's focus on exports, sourcing has been considered in the fieldwork to understand how the trend of near-shoring and reshoring is evolving amongst the UK's manufacturing base. The evidence is conclusive in this trend, that not only has there been an increasing shift towards domestic sourcing over the past five years, but that the sector reports that this is set to accelerate in the coming five years as well.

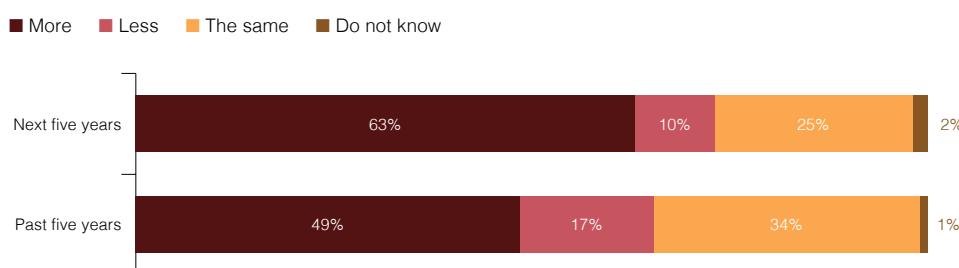
The data shows compelling figures to support the notion that UK manufacturers are increasingly seeking to source domestically. Looking back over the past five years, almost

exactly half of the exporting sector (49%) suggests that they have sourced more material from the UK, with only 17% suggesting they have sourced less, resulting in a net positive balance figure of +32%, indicating UK sourcing has increased.

Looking ahead over the next five years, this accelerates. 63% expect UK sourcing to increase in the future, with only 10% suggesting less, leading to a net positive balance of +53% reporting that they expect UK sourcing to increase in the coming five years, robust sentiment evidence of the trend towards domestic sourcing for UK exporting manufacturers.

Chart 5: UK manufacturers report a trend of domestic sourcing set to continue

% respondents indicating whether their business has sourced more or less material from the UK and how they expect that to change in the coming five years



**ON BALANCE
THE MAJORITY OF
MANUFACTURERS
EXPECT UK-SOURCING
TO INCREASE
IN THE COMING
FIVE YEARS**

Source: Make UK/DHL International Trade Trends Survey 2025

Sentiment for the year ahead

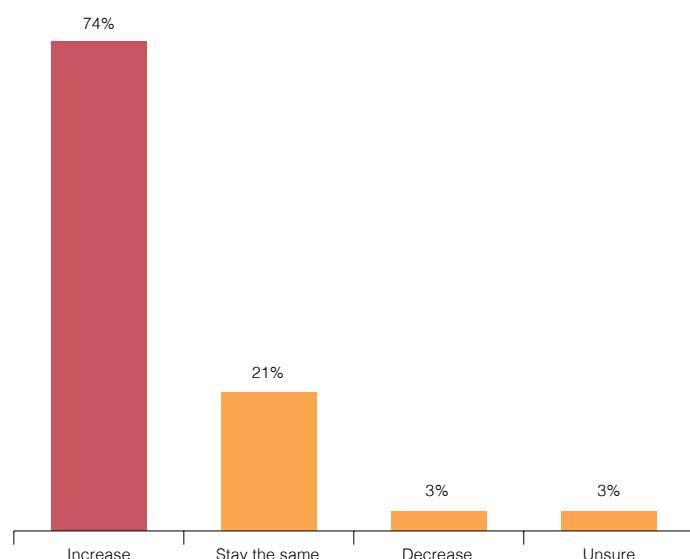
Somewhat remarkably, especially given the mood music around the wider UK economy at the time of this research, exporting manufacturers are optimistic about their export volumes in the year ahead. Three out of four (74%) expect their export volumes to increase in the next 12 months, with 21% expecting no change and a vanishingly small 3% expecting a decline. This robust positivity in what the sector expects to be a growth year for exports, albeit to an unknown degree of scale based on this data, shows that the currently exporting segment of the manufacturing sector is entering the next year with a growth mindset, even despite geopolitical concerns and dwindling confidence in the domestic economy.

The outlook is somewhat more nuanced when we analyse the data by group structure. UK-only companies are less confident in their exporting outlook than international firms.

While still positive, for UK-only companies the optimism for growth in exports is only shared by 66% of the segment, whereas for those that are part of an international group, this rises to 76% or 82%, the former being for those firms which are an international subsidiary and the latter UK firms with international subsidiaries.

Chart 6: Exporters are particularly optimistic about volumes in the year ahead

% respondents indicating how they expect their company's overall volumes to change in the coming 12 months



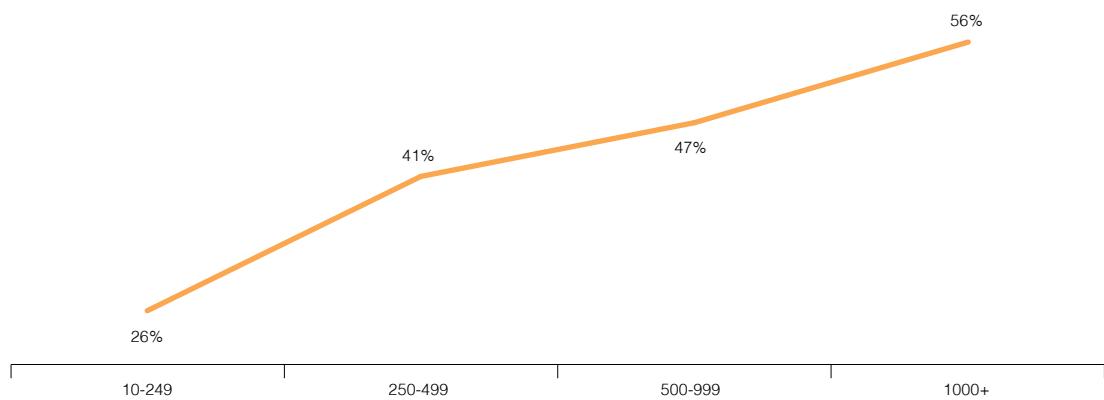
Source: Make UK/DHL International Trade Trends Survey 2025

By company size, exporting confidence for the year ahead scales strongly across company sizes when the data is stratified by company headcount band. Chart 7 shows prevalence of 'very confident' views on the year ahead's

export prospects. However, the data is more consistent across size band for those that are only somewhat confident or hold a negative view.

Chart 7: Exporting confidence for the year ahead scales strongly with firm size

% respondents within company headcount bands reporting 'very confident' in how they expect their company's overall exports volumes to change in the coming 12 months



Source: Make UK/DHL International Trade Trends Survey 2025



THE IMPACTS OF TRADE POLICY AND THE EXTERNAL ENVIRONMENT

Similar, but slightly apart from manufacturers' confidence in their own export volumes, we turn to their outlook for the wider UK's trade prospects. Consistent with our previous findings, we see that the sector is, overall, confident in the UK's trading prospects in the coming year, with 79% suggesting as much. A further third of the same consider themselves 'very' confident in the UK's trading prospects in the year ahead.

On geopolitical concerns, the research asked how the geopolitical environment over the past five years has affected confidence in trading, and on balance, there is a slim positive balance that suggests it has had a positive impact on trade. It is interesting to reveal that geopolitical turbulence is not universally viewed as a drag on trade. However, views are mixed as can be seen in the infographic. When this data is cut by company size, we see a trend that geopolitical concerns have been more disruptive to smaller firms than larger ones, at approximately twice the severity in terms of the proportion of firms in either category, suggesting a positive impact arising from geopolitical factors for some segments.

What impact on trading confidence has the Geopolitical environment had in the past five years?

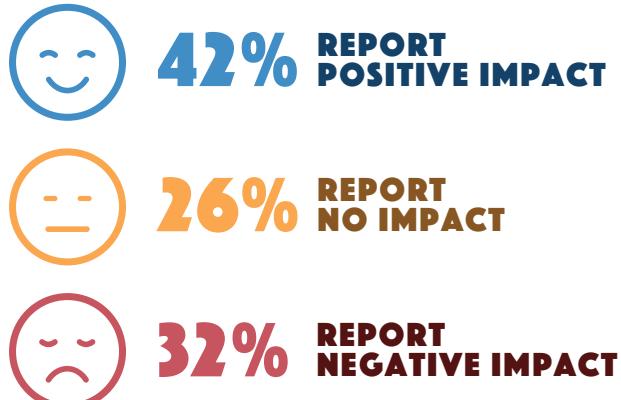
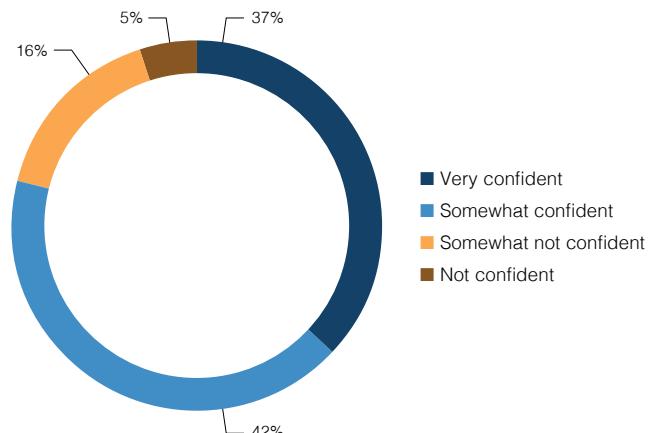


Chart 8: Manufacturers are also confident in the wider UK's trade prospects

% respondents reporting their confidence in the UK's wider trade prospects in the coming 12 months



Source: Make UK/DHL International Trade Trends Survey 2025



POST-BREXIT TRADE EXPERIENCE WITH THE EU

Despite presenting a mixed picture, our research into the performance and market selection of exporting manufacturers post-Brexit shows, on balance, a moderately positive picture relative to the 2020 baseline.

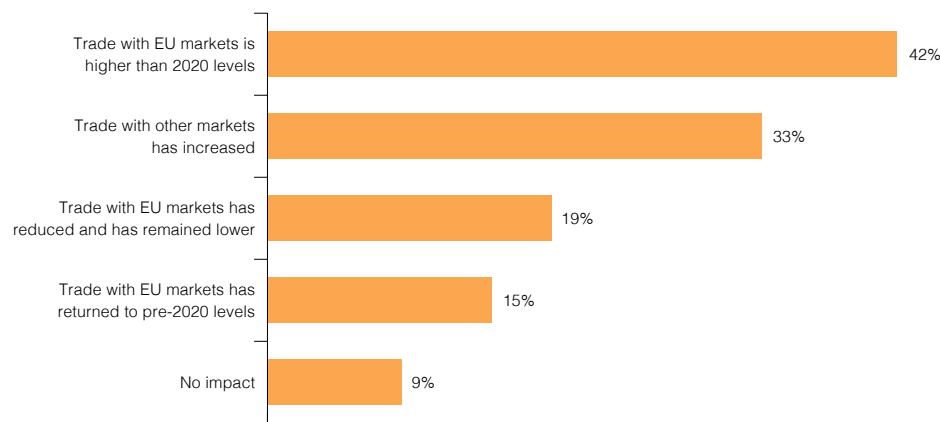
The data reveals a mixed bag of results for UK manufacturers, with some firms achieving growth beyond the baseline but a significant minority seeing contraction. 42% report that their trade with EU markets is now higher than what it was at 2020 levels, 19% say that it had reduced and remained lower, and 15% suggest it had remained at the same level as it was. The balance between those reporting an improved picture and a worsened or stationary one stands at only +8% across the sample, suggesting that, on aggregate, exporting manufacturers are only slightly outperforming their 2020 EU trading relationships.

One in three firms says that their trade with non-EU markets has increased since 2020, indicating that trade diversification has occurred alongside, as opposed to instead of, any efforts to rebuild trading relationships with either new or existing EU trading partners. Just under one in ten (9%) say that there has been no impact, reinforcing the point that UK-EU trade has been structurally reshaped, independent of whether trading volumes have ultimately grown or contracted.

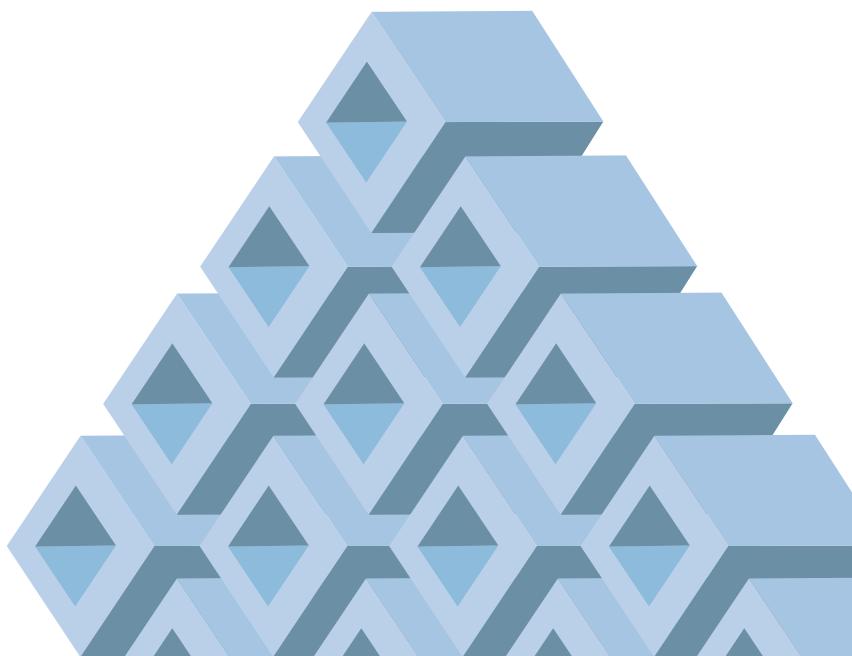
Firms in the 10-249 employee category were more likely to report ongoing reduced trade with the EU, with 54% reporting as much. In comparison, firms in the 250-499 band were more likely to report 'no impact', or that had returned to at least 2020 levels, suggesting that smaller and lower turnover firms are more likely to have reduced their EU activity, and that middle-sized and larger firms have either remained steady or expanded volumes under the new trading relationship.

Chart 9: On balance, the data suggests improved EU trading compared to the 2020 baseline

% respondents responding to the question "Since the UK's exit from the EU, how has your trade with the EU been affected?"



Source: Make UK/DHL International Trade Trends Survey 2025



POLICY AND THE PRESSURES OF COMPETITION OVER THE PAST FIVE YEARS

Our research shows that despite tariffs and duties emerging as the most prevalent reported factor impacting trade, there are plenty of other factors that are consistently impacting the sector's trading experience. Eight out of ten exporting manufacturers reported that tariffs and other duties were impacting their business, and a similarly large majority, 76%, also reported the same about meeting changing regulations.

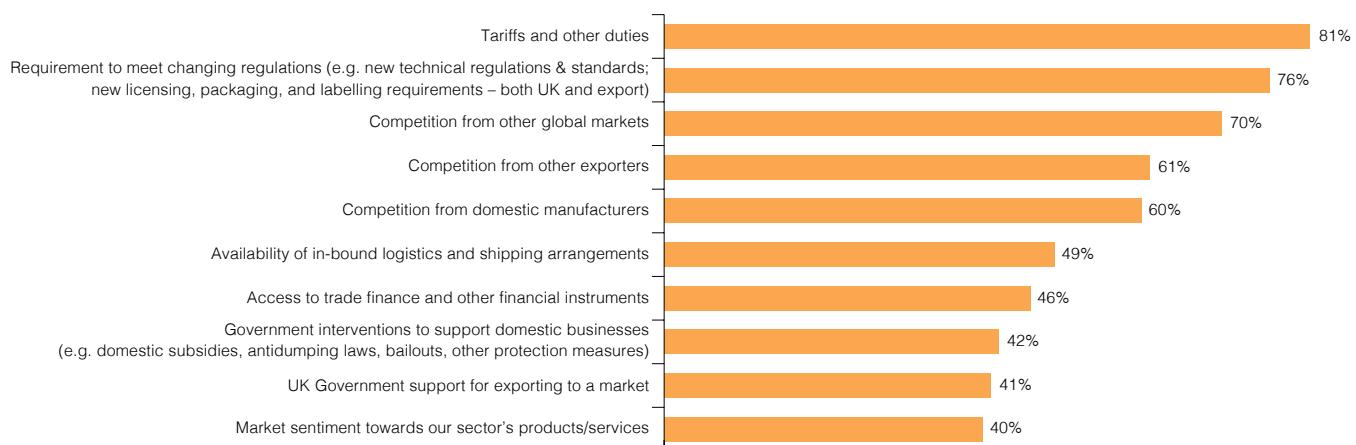
The trading policy environment has been in flux for manufacturers over the past five years. The cumulative effects of EU-UK regulatory divergence, changes to US industrial policy and the continued evolution of product standards have all combined, to name a few, meaning that adaptation

to external factors has become something the sector has needed to adjust to continually, as opposed to reacting to individual discrete events.

Impacts from competition feature prominently in the data, with 70% reporting that competition from other global markets has had an impact, 61% reporting that competition from other exporters has also had the same, and 60% suggesting competition from the domestic market has been influential. The tight grouping of these concerns reveals a double exposure the sector faces in terms of competition, both from within the UK manufacturing ecosystem, but also in even measure competition from other nations' sectors too.

Chart 10: Tariffs dominate as the most prevalent factor impacting manufacturers' trade

% respondents indicating whether the shown factors have impacted their business's trade in the past five years



Source: Make UK/DHL International Trade Trends Survey 2025





BRITAIN'S TRADE REPUTATION AND ITS SERVICE TO MANUFACTURERS

The UK, and the associated British brand, is widely recognised by the sector to be an asset in their export operations. Of course, there is a degree of implicit bias given the fieldwork included exclusively British (or international firms with a British manufacturing presence), however, virtually none of the sample disagreed with the sentiment that UK goods have a reputation for quality, reliability and durability. This sentiment is replicated across other concerns, such as trust and legal compliance when doing business with Britain, as shown in Chart 11.

85% of respondents suggest that they lean into the 'Britishness' of their product or company in their global

marketing, leveraging what is evidenced in other questions contained in Chart 11 to be perceived as a strong positive sentiment associated with the UK's businesses on a global stage.

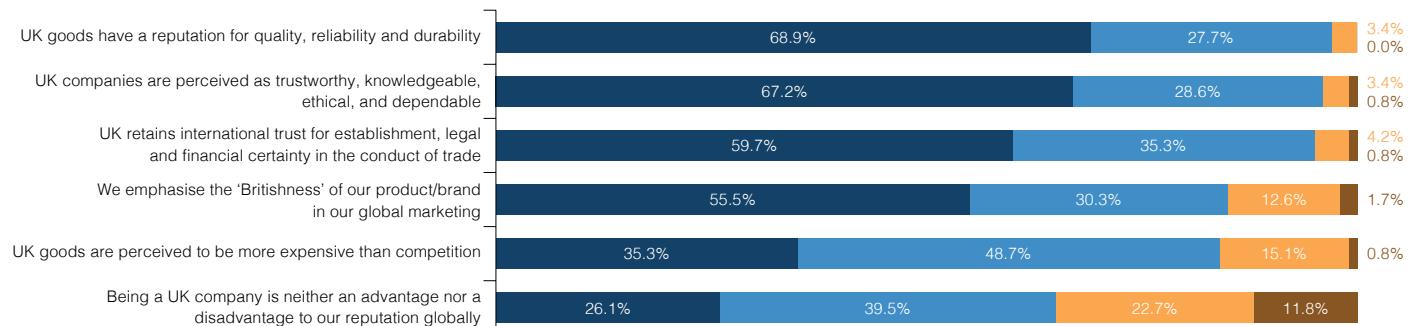
However, the data shows a degree of self-awareness from respondents that UK-made products have a reputation for being more costly than those of competitors, with a strong majority of 84% agreeing this to be the case.

This data suggests that, on balance, the sector sees the 'Britishness' of their global offer to be one predominantly of quality and trust, rather than a cost-competitive proposition.

Chart 11: The British brand is perceived as a valuable asset by the sector

% respondents responding to "Thinking about the reputation of Britain in global trade, to what extent do you agree with the following statements"

■ Agree ■ Somewhat agree ■ Somewhat disagree ■ Disagree



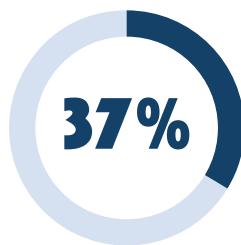
Source: Make UK/DHL International Trade Trends Survey 2025

BARRIERS, RISK AND GLOBAL COMPETITION

Perhaps unsurprisingly, almost no firm in the sector reports trading in a frictionless environment, only 3% reported facing no barriers to trade when participating in the market. Tariffs and other related entry requirements are the most prevalent reported barrier, cited by 58% of respondents, this is then followed by customs delays at 50% and transport costs at 46%.

Lack of demand (19%) and lack of internal export skills (13%) are cited by the small minority, which shows that from the point of view of exporting manufacturers, barriers to their trading performance predominantly lie beyond their control and that they are systemic and policy related.

Just over a third of exporting manufacturers are avoiding markets due to complexity or risk

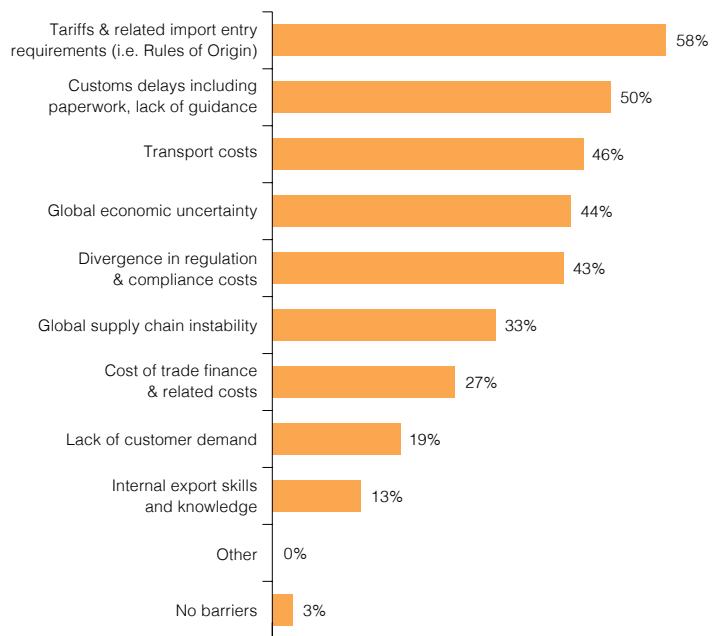


avoiding markets
due to risk

The market avoidance data is relatively consistent across company size bands, indicating that the concerns are present for even the largest £500+ million turnover firms, even though intuition might have suggested the largest companies would have the means to mitigate the perceived risks to market penetration, where smaller firms might not.

Concern about global competition is almost universal, 87% of manufacturers are concerned about the level of global competition that they face, with 31% reporting that they are very concerned and 56% saying they are somewhat concerned. Only one in ten (13%) say that they are not concerned at all.

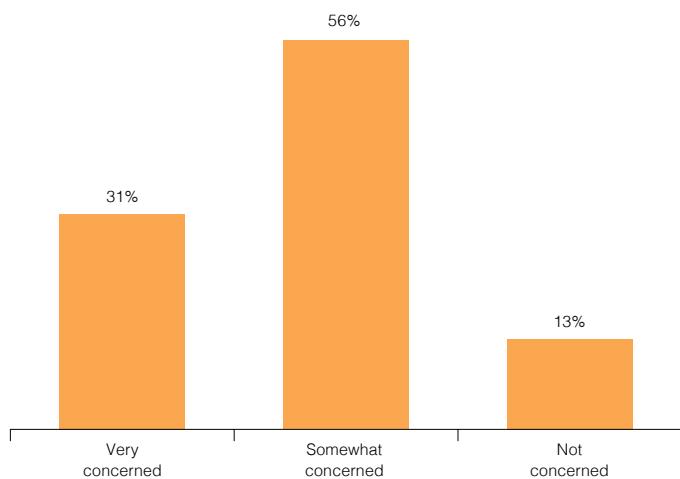
Chart 12: The prevalence of barriers to export
% respondents highlighting what the barriers to their export are



Source: Make UK/DHL International Trade Trends Survey 2025

Chart 13: Concern about global competition is widespread

% respondents reporting to what degree they are concerned about global competition facing their business



Source: Make UK/DHL International Trade Trends Survey 2025

ROUTES TO MARKET AND GROWTH STRATEGY

The research set out to understand more practical questions about how the sector is conducting its trade, such as how firms are selling to customers, how they are planning for growth and what mitigating steps they might be taking to smooth any impacts from the most recent US tariff regime.

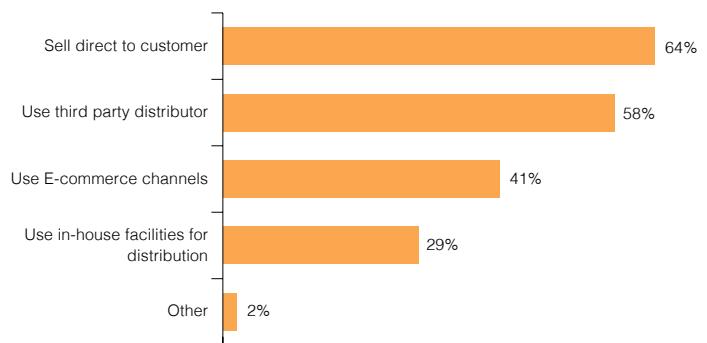
The data shows that most exporters are using a mix of direct and intermediated routes to come to market. With the knowledge that these options were not exclusive, 64% reported selling direct to customers, and 58% said they used third-party distributors. 41% use e-commerce themselves, and 29% operate distribution facilities in-house. This is a truly mixed approach, with little in the way of dominance emerging in terms of a common route to market.

Direct sales and distributor approaches are common across the board throughout all company sizes, yet digital approaches are skewed towards mid-market and larger exporters. Among those firms reporting to use e-commerce, three-quarters have a turnover in excess of £50m, with only one in five beneath the £50m turnover mark.

Likewise, for the use of in-house distribution facilities, this also leans towards larger and mid-market manufacturers, with a third of the firms using this route residing within the £50m-£100m turnover band. Direct-to-consumer selling is spread relatively evenly across size bands. These findings lend evidence to the intuition that the scale of the firm matters when considering using digital-forward or capitally intensive routes to market.

Chart 14: A genuinely mixed route to market for UK manufacturing exporters

% respondents reporting which mode they use to bring their product to market (multiple selection)



Source: Make UK/DHL International Trade Trends Survey 2025

EXPORTING STRATEGIES FOR THE FUTURE

Perhaps the most important finding of this section is seen in the unanimous view of the sector that effectively all firms will either create or change an export strategy in the next five years. 0% suggest that they have no plans to change their export strategy, and only 1% say that they will not create one. This is overwhelmingly robust evidence that the exporting UK manufacturing base is poised to be adaptive with its export strategy in the coming years.

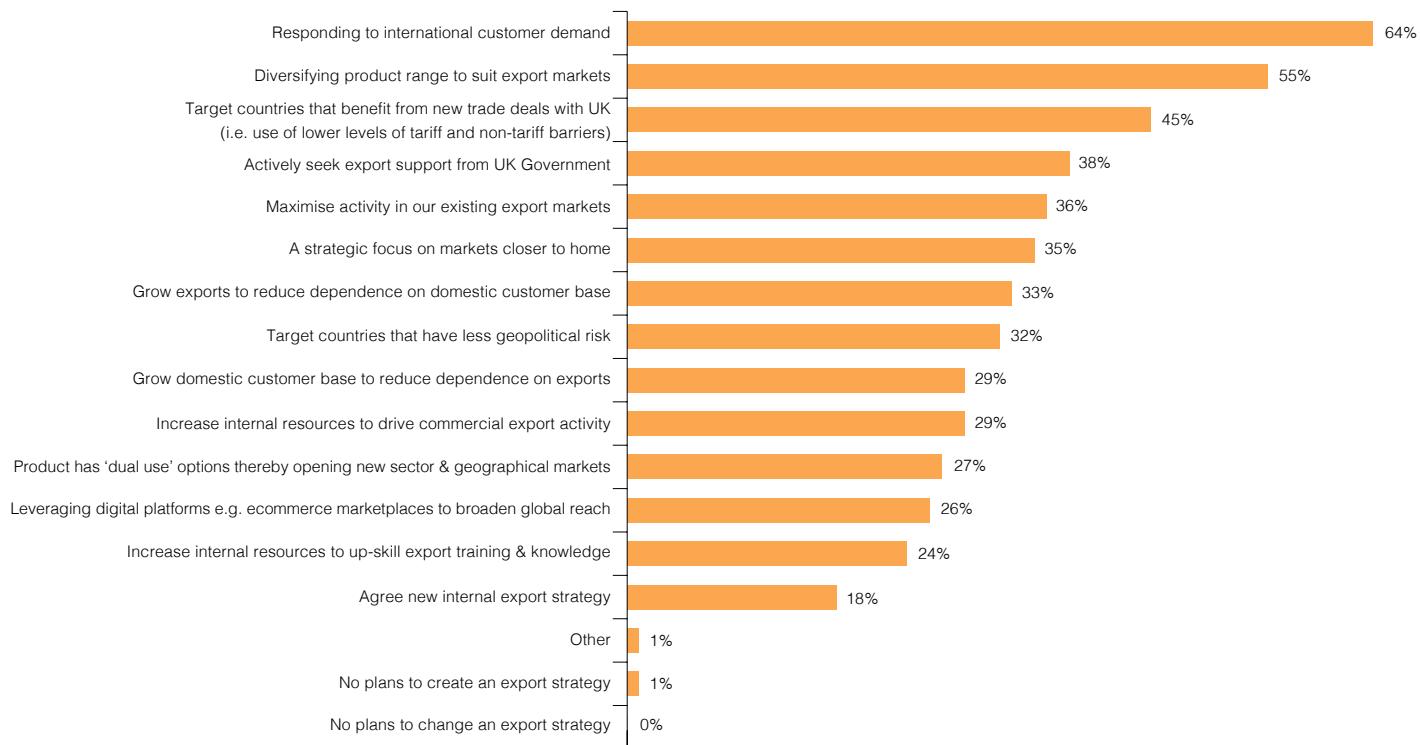
The research shows that manufacturers plan to focus on leading growth through demand and appropriate product

diversification, with these levers being adopted by 64% and 55% of exporting manufacturers, respectively. Following the trend of appropriate product diversification, just over one in four manufacturers (27%) report that their product has 'dual-use' opportunities, therefore potentially opening up new sectors and geographical markets.

Combined, these insights suggest that product adaptation to expand market accessibility is a prevalent strategy for the year ahead.

Chart 15: Planning for growth: Manufacturers' strategies in the coming years

% respondents reporting which actions they will take as part of their export strategy in the coming five years



Source: Make UK/DHL International Trade Trends Survey 2025

**JUST OVER 1 IN 4 MANUFACTURERS
PLAN TO EXPLORE THE POTENTIAL OF
'DUAL-USE' PRODUCTS
IN THEIR PORTFOLIO TO OPEN UP MORE
SECTOR AND GEOGRAPHICAL OPPORTUNITIES
IN THE COMING FIVE YEARS**



US IN FOCUS: A LIVE TEST CASE FOR ROUTE-TO-MARKET RESILIENCE

The recent sweeping changes to US tariff policy have sent a shock through trading relationships globally, leading to direct and indirect impacts for UK exporters, and not just to the US market. The timeliness of this research has meant we have been able to take advantage of manufacturers' mitigating actions to see how the sector has responded to such aggressive stimuli.

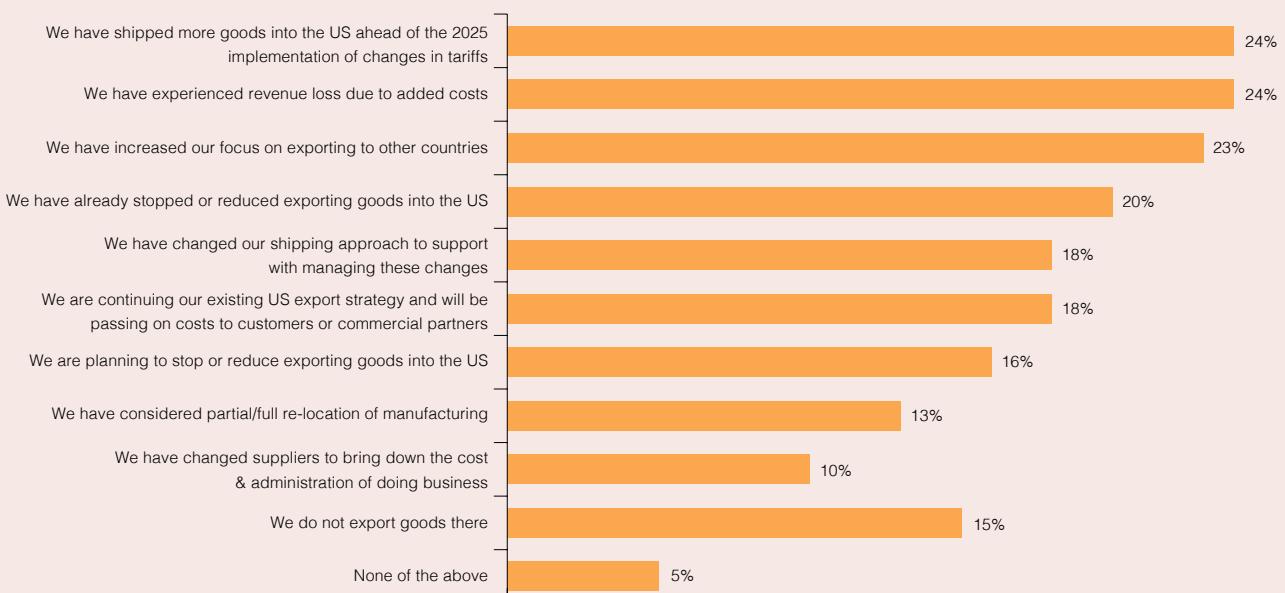
The data shows that US tariffs have driven both short-term accelerations in trade, but also market retrenchment by some. One in four respondents (24%) report having

shipped more goods into the US ahead of new tariffs coming into effect, however, a similar 24% also report revenue loss associated with increased costs arising from tariffs. 23% report having focused on other markets as a mitigating action, and one in five (20%) say that they have stopped or reduced exporting goods into the US as a result.

The data contained in Chart 16 reveals the duality of the response from the sector, with some in almost equal measure accelerating trade and others exiting the US market as a result.

Chart 16: Manufacturers reveal the impacts when faced with new US tariffs

% respondents reporting which of the specified apply to their business regarding exporting to the US



With 20% reporting to have already stopped or reducing exports to the US, plus an extra 16% who say they are planning to do so, there is a not-insignificant minority who are exiting the US market as a result of tariff policy changes. A similarly relevant portion (15%) does not

export to the US at all, however, this does not mean these firms are necessarily excluded from tariff impacts, as trade diversion from other markets, such as with the EU, may well impact UK exporting manufacturers that never had an export relationship with the US in the first place.

Chart 17: What mitigating strategies are manufacturers taking in light of US tariffs?

% respondents reporting which alterations to their own US trade strategies they are considering



Source: Make UK/DHL International Trade Trends Survey 2025





SUPPORT FOR GROWTH

Only 6% of firms say that they do not need any support to grow their exports, a compelling case for the need for supportive domestic government policy to facilitate future growth. The most popular highlighted form of support identified is direct UK government export support, with the majority of 55% reporting so.

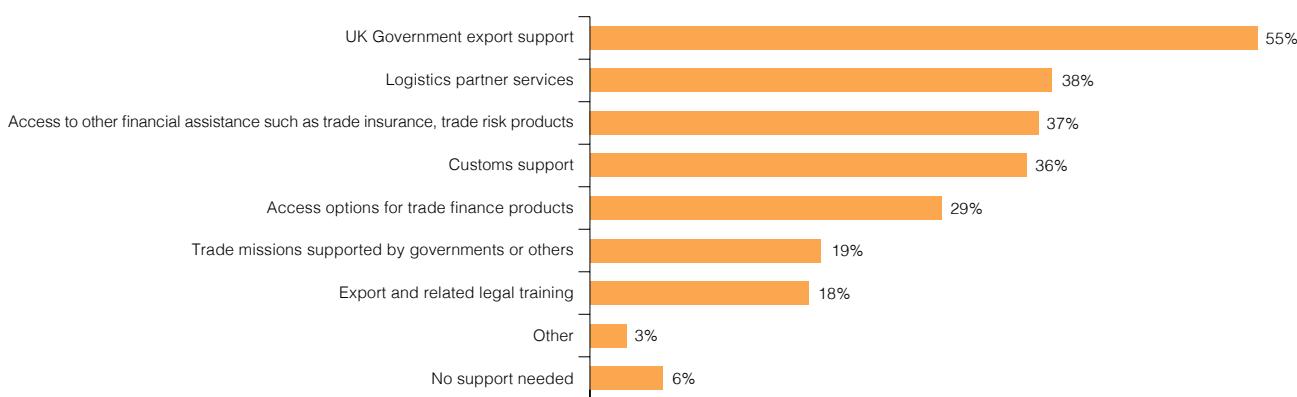
This category is generally defined as a call for an enhancement in coordinated and proactive government help to penetrate foreign markets, this can cover strategic guidance, promotional work, improving the UK Export finance offer and smoothing regulatory pathways.

This option allowed respondents to share the views in a general non-specific manner, despite the existence of more explicit options within the fieldwork. This is particularly prevalent in the mid-market, the £50m-£100m turnover bracket, which accounts for four in ten of all responses in that category.

Logistics partner services feature as the second most called for form of support, with 38% of respondents identifying this. Logistics, customs and finance support all form the top priorities for support beyond government support. In each case, just over a third of respondents all call for further support in these areas.

Chart 18: Manufacturers identify the support needed for export growth

% respondents reporting what support their business needs to grow exports



Source: Make UK/DHL International Trade Trends Survey 2025

SPOTLIGHT

SUPPLY CHAINS & LOGISTICS

INPUT SOURCING GEOGRAPHIES

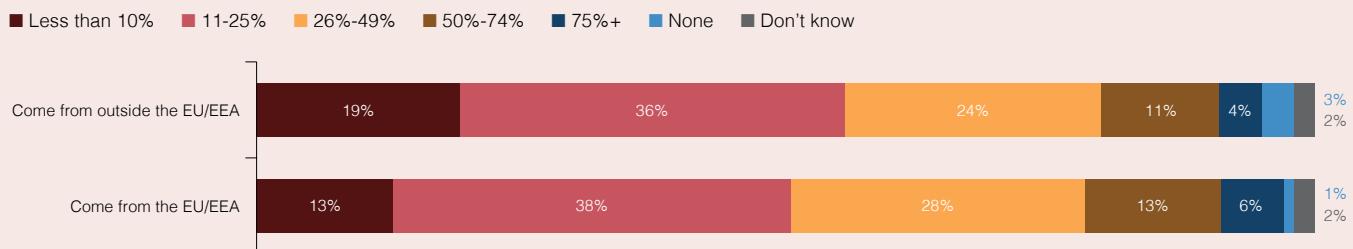
This research has focused on the export market for UK manufacturers, although it also conducted fieldwork to understand what the import geography make-up consisted of for exporting UK manufacturers. On average, the data shows that exporting manufacturers in the UK report broadly similar patterns for both EU/EEA and non-EU/EEA sources for their inputs.

Even visually, it is quite apparent from Chart 18 that the

evidence shows that, for exporting UK manufacturers, there is an international supply base, with a slight skew towards EU/EEA sourcing. Very few respondents report having no foreign inputs, with only 1% of respondents reporting that they have no EU/EEA inputs, and only 3% saying they have no non-EU/EEA inputs, highlighting the deeply integrated nature of supply chains despite the earlier evidence of progressive intentions to move towards a greater proportion of domestic sourcing.

Chart 19: Input sourcing: where are the inputs coming from?

% respondents reporting which geography their UK input is sourced from



Source: Make UK/DHL International Trade Trends Survey 2025

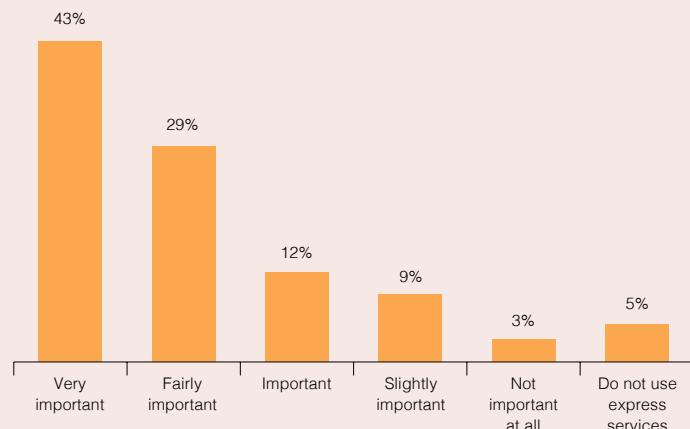
LOGISTICS IN ENABLING TRADE

As revealed earlier in the report (Chart 18), logistics support is a critical area that the sector has identified as instrumental to its ability to grow exports. The research set about to understand how important express services were to remain competitive.

Evidence from the sector overwhelmingly suggests it is critical to compete internationally, with 93% of the sector reporting that express services are important to at least some degree for the international competitiveness of their business, with 43% saying it is very important to the competitiveness of their business. Only 3% say it is not important at all, with 5% reporting having not used these services in any case.

Chart 20: Express logistics are critical to international competition

% respondents reporting how important express logistics services are to their businesses' ability to compete internationally



Source: Make UK/DHL International Trade Trends Survey 2025

What is an 'express service'?

Express services are an offering by logistics providers that denote premium, time-definite domestic and international shipping that prioritises speed, reliability and end-to-end visibility, often including assistive services such as expedited customs clearance support.

This importance scales very strongly with company size. At the smaller end of company size, 10-249 and 250-499 employees, 38% and 35% respectively consider express services very important. This scales to just over 50% for 500-999 employee firms, then rising to just under 70% for those firms with 1000+ employees.

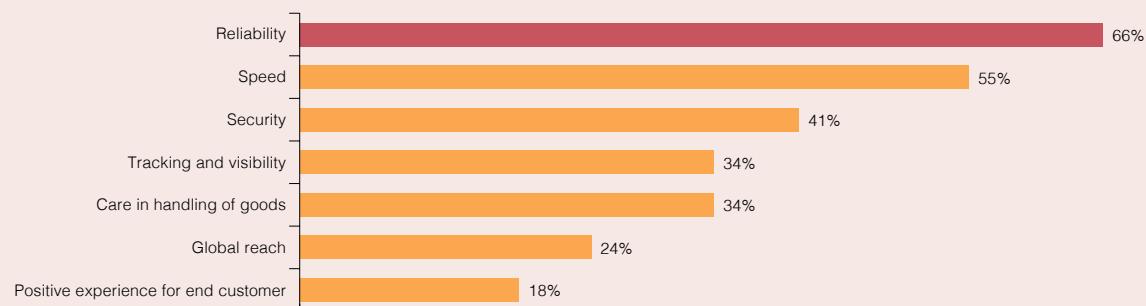
But why are these express services important to a

business' competitiveness? A supplementary question was asked of the panel on the importance of these services.

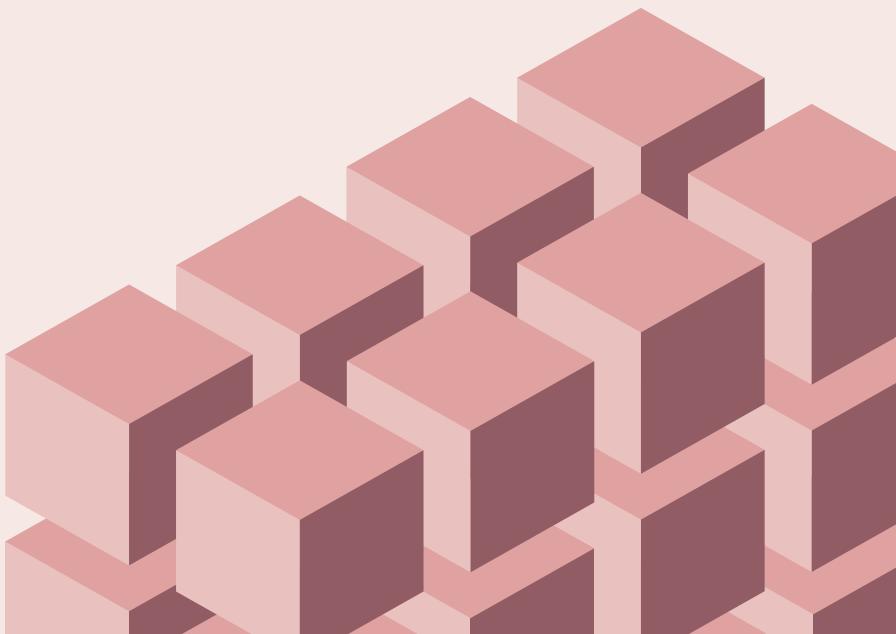
The most prevalent feature identified as a priority of air express services is their reliability, a view shared by two out of three (66%) respondents. Just over half (55%) cite its speed as a priority, and four in ten highlight its security as an important feature.

Chart 21: Which factors do manufacturers consider important in air freight?

% respondents reporting which service features they prioritise when they choose to ship goods via air freight



Source: Make UK/DHL International Trade Trends Survey 2025



CONCLUSION

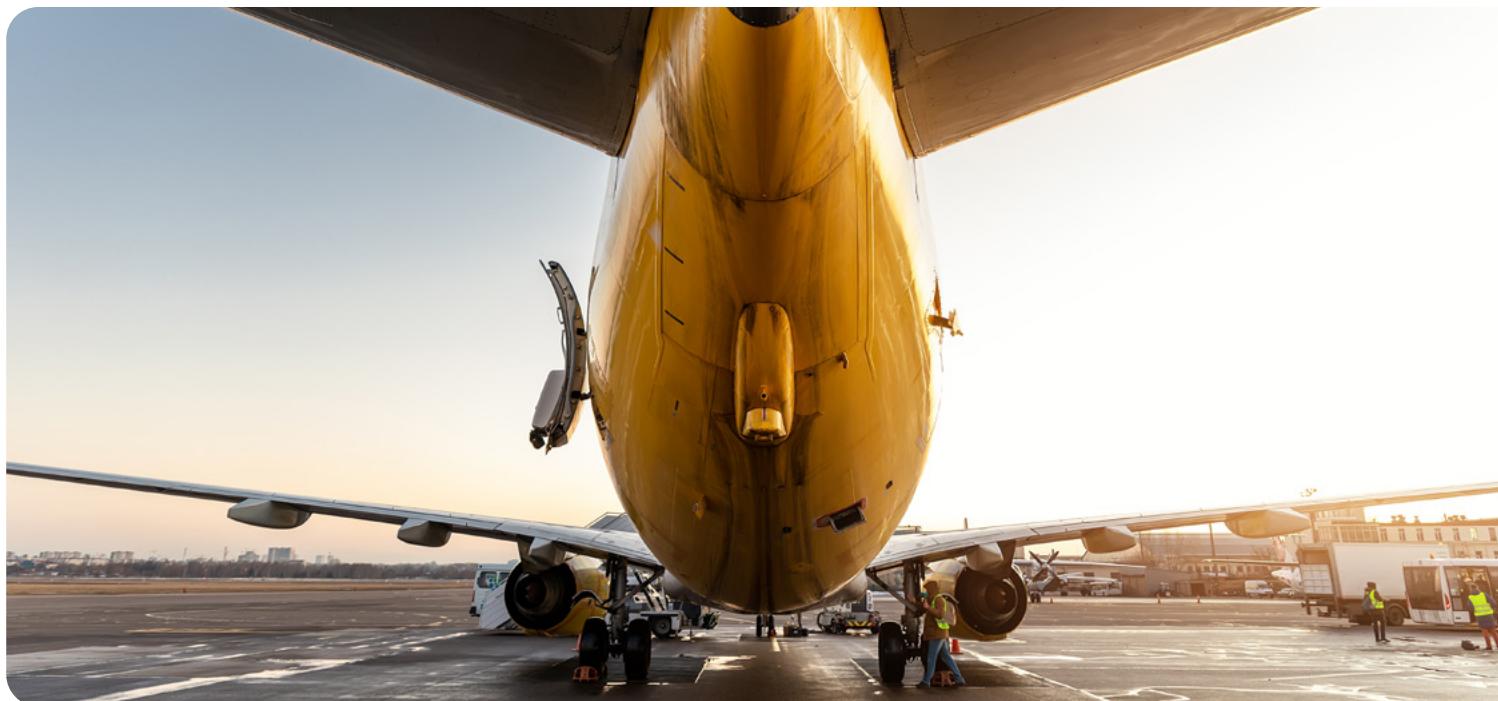
The research's broad findings have emphasised the key role international markets play in the success and proliferation of the UK manufacturing base. It's shown that exporters are, on average, generating a third of their annual revenue from overseas customers, with a significant minority generating the lion's share of their sales through export. What this shows is clear, international market participation is not just peripheral to the sector's prospects, it underpins it. For many firms that were participant to this research, export activity goes well beyond a 'nice-to-have', but rather is a core driver of growth, competitiveness and the catalyst for investment.

The enduring dominance of both the EU and US as key export destinations demonstrates the continuing importance of maintaining active, mutually beneficial trading arrangements with these markets and has highlighted the value of the stability of the policy environment, regulatory consistency and low-friction market access. However, the wider market coverage of the sector's exports has demonstrated the sector's adaptability to further-afield markets and the global ambition the sector holds.

Looking ahead to the coming few years, the mixed performance of export markets for UK manufacturers relative to the pre-pandemic baseline demonstrates a

trading environment still characterised by volatility. Whether this volatility is driven by structural change, geopolitical tension or yet unforeseen factors, the sector reports a strong future intention to drive growth through export expansion into both new markets and existing, with a willingness to meet the complexities of global trade expansion head-first.

What the industry now requires is a strategic and coordinated approach that bolsters the UK's competitiveness through enhancing key partnerships, streamlining UK-EU trading arrangements, supporting new market access and ensuring domestic regulation development exists to enable exporters.





Make UK, The Manufacturers' Organisation, is the representative voice of UK manufacturing, with offices in London, every English region, and Wales.

Collectively we represent 20,000 companies of all sizes, from start-ups to multinationals, across engineering, manufacturing, technology, and the wider industrial sector. Everything we do – from providing essential business support and training to championing manufacturing industry in the UK and internationally – is designed to help British manufacturers compete, innovate, and grow.

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www.linkedin.com/company/makeuk

For more information, please contact:

Richard Rumbelow

Director of International Business
Make UK
rrumbelow@makeuk.org

James Brougham

Senior Economist
Make UK
jbrougham@makeuk.org



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For more information, please contact:

Katy Starling

Head of External Communications
DHL Express UK
katy.starling@dhl.com



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JB.26.01.2026