Sectoral Analysis

February 2026

Food Sovereignty in France & the UK

Smoothing Cross-Channel Trade and Leveraging AgriTech

agriDées
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CROSS CHANNEL *Institute*

By the FRANCO BRITISH *Chamber*

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Foreword

Olivier Campenon
Chairman, The Cross-Channel Institute

Charles Meaudre
President, Agridées

In the space of just a few years, food sovereignty has emerged as a major strategic issue, both in France and in the United Kingdom. Long viewed solely through an agricultural lens, it now sits at the crossroads of essential concerns: economic competitiveness, climate disruption, security and social cohesion.

It is from this shared observation that the Cross-Channel Institute — the think tank of the Franco-British Chamber of Commerce and Industry — and Agridées, the agricultural enterprise think tank, decided to jointly undertake an in-depth reflection on agricultural and agrifood relations between France and the UK. Very quickly, food sovereignty proved to be a particularly fruitful framework for analysis, given how interdependent our economies remain, including in the context of the 2021 Trade & Cooperation Agreement and the UK-EU Reset.

Warning signs are numerous. We are expecting France's agricultural trade balance to have moved into deficit in 2025. The United Kingdom has already been in this situation for several years, with a structural dependence on imports. In an international environment marked by geopolitical tensions, conflict risks, the multiplication of trade barriers and logistical fragilities, this dependence increases the vulnerabilities of both our nations.

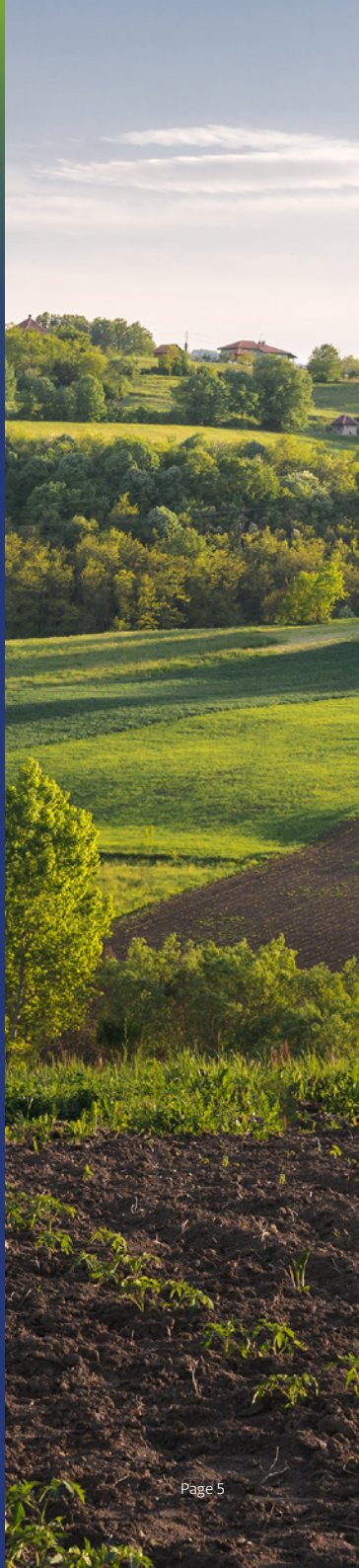
Added to these challenges is the growing impact of climate change, reflected in increasingly frequent extreme events (precipitation and temperature): pressure on yields and livestock conditions and strain on natural resources — particularly regarding access to water. French and British agricultural sectors are undergoing profound transformations that directly affect producers — whose economic viability is being tested — as well as consumers, for whom access to affordable quality food remains a major concern.

In this context, strengthening cross-Channel cooperation appears not only desirable but essential. Agridées and the Cross-Channel Institute, true to their mission of independent analysis, sector expertise, and dialogue between public and private stakeholders, have chosen to combine their perspectives and capabilities to shed light on these structuring issues.

This sectoral analysis entitled *"Food Sovereignty in France & the UK: Smoothing Cross-Channel Trade and Leveraging AgriTech,"* pursues a dual objective. First, it provides a precise overview of agricultural and agrifood trade between our two countries, in order to better understand existing interdependencies and structural vulnerabilities. It then highlights the decisive role those new technologies — through AgriTech — can play in strengthening the resilience of farmers and supply chains, securing supply systems, and supporting the transition toward more robust and sustainable models.

Our work clearly shows that innovation is no longer a marginal concern; it has become central. Digitalisation, automation, optimisation of water use, loss reduction, new renewable energy sources — the solutions being deployed in agriculture within the bioeconomy are already providing concrete responses to highly operational challenges. France and the United Kingdom benefit from a remarkable network of technological innovation and a dynamic investment ecosystem. The combination of these strengths constitutes a powerful lever for strengthening our shared food sovereignty.

This publication is intended as both a tool for understanding, a space for dialogue, and an invitation to action. Given the scale of the challenges, investing in innovation, structuring cross-Channel partnerships, and supporting field actors are no longer matters of choice but of necessity. It is on this condition that sustainable, resilient, and shared food sovereignty between our two countries can be built.



I

Agrifood trade between France and the UK Facts and figures

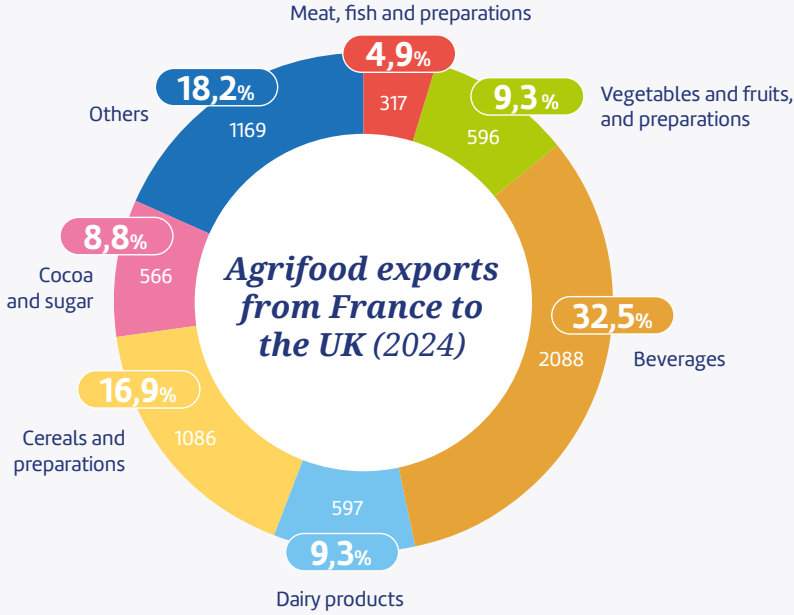
Quentin Mathieu
Head of Business and Economic Forecasting
Agridées

The United Kingdom and France maintain a close trade relationship, characterised by longstanding and intense exchanges encompassing all product categories. In 2024, French exports to the United Kingdom amounted to €37.7 billion, while British exports to France reached €26.9 billion. This two-way trade confirms the European Union as the UK's main trading partner and enables France to generate a surplus of more than €10 billion, which is vital for the balance of national accounts.

In the agrifood sector, France was the **leading customer** for British agrifood exports and its **second largest** supplier, behind the Netherlands in 2024. The British market has historically been a major outlet for high value added French products, including **wine** and other beverages (more than **€2 billion**), **cereals** and cereal products (over **€1 billion**), as well as **cheese** and other dairy products (around **€600 million**), as illustrated in Figure 1.

France, for its part, is a key customer for British **fisheries products** (about **€900 million**), certain **meat products** (notably lamb and beef cuts, with approximately **€700 million**), as well as for iconic cheeses and spirits such as **cheddar**, **gin**, and **whisky**.

Figure 1



Source: Eurostat, Agridées treatment ***in million €***

This relationship reflects the mutual interest and shared gastronomic heritage on both sides of the Channel, and it has demonstrated resilience despite major geopolitical and political disruptions in recent years. Nevertheless, Brexit has had considerable impacts on this trade, including a decline in volumes exported from France to the UK and an increase in trade costs between the two countries.

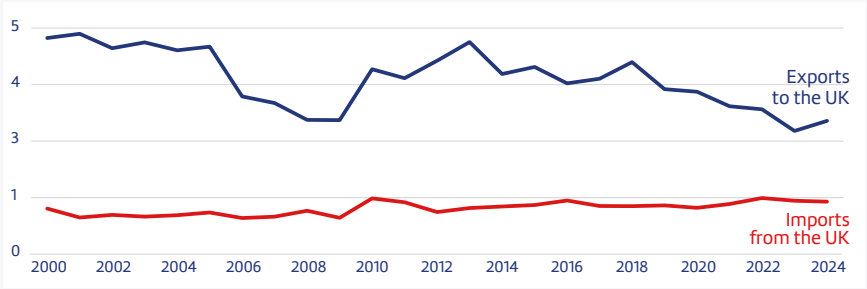
Over the past decade, the amount of food shipped from France have gradually shrunk, with a total decline of 25%, which is roughly equivalent to around one million tonnes of agrifood products compared with the pre-Brexit period (Figure 2).

This reduction is particularly sharp between 2021 and 2022, following the implementation of the EU-UK Trade and Cooperation Agreement, a period during which French agrifood exports fell by 500,000 tonnes in just one year.

Figure 2

Agrifood trade in volume between France and the United Kingdom

in million tones



Source: Eurostat

Several economic factors and mechanisms contribute to this trend

Structurally rising inflation in the United Kingdom since the Brexit announcement has forced British consumers to make consumption tradeoffs, to the detriment of highvalue products such as cheese and wines with appellations of origin. Moreover, tensions in global supply for certain commodities have pushed prices up, diverting British demand away from French products in favour of other countries, as the UK has signed trade agreements with non-EU countries to diversify its suppliers.

From 2016 to 2024, export volumes of beverages—including wine—from France fell by 15%. Major field crops and processed products also recorded sharp declines: –40% for sugar, –30% for cereals, and –20% for oilseeds.

A second factor explaining the drop in volume lies in the **rise of nontariff trade barriers and logistical costs**, which have severely affected Franco-British trade since the Trade and Cooperation Agreement entered into force in 2021.

These costs result from numerous technical difficulties encountered during sanitary inspections and customs clearances at the border, causing delivery delays and additional expenses (product losses, logistical penalties, insurance fees). Perishable products—such as dairy, fruit, vegetables, and meat—are hit particularly hard. For example, volumes of dairy products shipped from France have dropped by 30%, and fruit by 13% compared with the ten year average. Vegetables also experienced a sharp downturn when the 2021 agreement was implemented, with exports halving in 2022, although the situation later partially stabilised thanks to French exporters adapting to new regulatory requirements.

This situation does not only impact France but all trade between the European Union and the United Kingdom. A study published in *The World Economy* estimated that implementation of the agreement and frictions linked to nontariff barriers resulted in:

- **A 36% decline in British exports to the EU in value,** and **46% in volume**;
- **A 23–37% decline in British imports from the EU in volume**, and **14–29% in value;**
- **A 35–45% reduction in the range of EU food products shipped to the UK,** reflecting the exclusion of many small and medium-sized European companies from the British market under this new framework.

[1] *Du, J., Shepotylo, O., & Shi, Y. (2025). Trade Disintegration and Agrifood Trade: United Kingdom Exit From EU. The World Economy.*

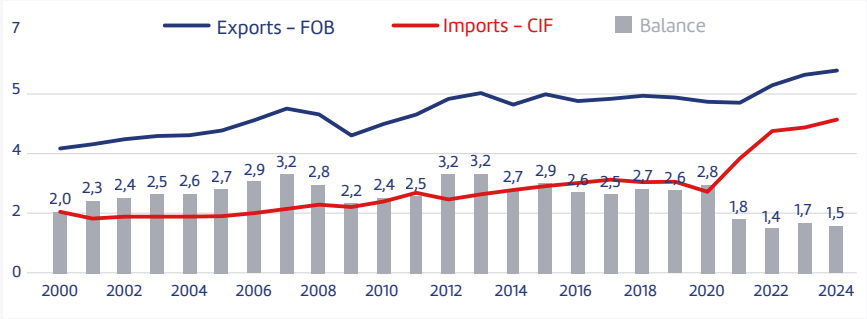
This trend is particularly visible in Franco-British exchanges. Overall, France's agrifood surplus with the United Kingdom—close to €3 billion—has nearly halved in value over the past five years (Figure 3). This deterioration is explained by falling French export volumes and, conversely, rising import costs for British products.

However, this development should be viewed in the context of asymmetries in customs clearance and France's role as a major customs clearance office for British goods entering the EU market. This "hub effect" tends to overestimate French import statistics, as around 30% of British agrifood goods transit through France, and one third of these volumes are sent to other Member States.

Higher contractual costs (freight, insurance) due to increased logistical and legal risks also contribute to this overestimation. This effect is particularly significant for seafood products and lamb meat, introducing a bias in France's import statistics from the UK and therefore downplays the apparent deterioration in the French trade balance with its British partner. It is also worth noting that the rise in French agrifood export value despite falling volumes (cf. Figure 1) is mainly the result of a price effect linked to global inflation on key agricultural commodities. In essence, the simultaneous rise in bilateral trade flows in value does not reflect the real underlying trend: FrancoBritish trade is deteriorating in terms of volumes exchanged.

Figure 3 **Bilateral agricultural and food trade** *between France and the United Kingdom*

in billion €



Source: Eurostat, Agridées treatment

Revitalising trade and strengthening relations between French and British operators is therefore once again a strategic necessity for both nations, in an increasingly unpredictable global geopolitical environment where food sovereignty issues extend far beyond national borders.

The current situation is detrimental both to consumers—who face higher prices and less diversity—and to producers, who face increasing difficulties in accessing markets. For French agriculture, it is urgent to secure and strengthen access to profitable export markets in a difficult global trading environment, where highvalue products such as wine and cheese are increasingly subject to retaliatory trade measures from major partners such as China and the United States.

In this context, the prospect of an EU-UK sanitary and phytosanitary agreement represents an opportunity to achieve this objective of trade revitalisation, provided that the British authorities:
(1) commit to dynamically aligning their national regulations with EU regulations; and (2) recognise the European Court of Justice as the competent authority for resolving commercial disputes within a shared legal framework.

Based on renewed mutual trust and upward alignment of rules and standards French and British agrifood stakeholders will be able to resume prosperous and mutually beneficial trade, while contributing to the construction of strong and reliable food sovereignty on both sides of the Channel.

FVE welcomes this project from the Franco-British Chamber of Commerce and Industry which outlines that strong sanitary and phytosanitary cooperation and continued investment in veterinary services, as guardians of safe and trusted trade, underpin a resilient Franco-British agrifood trade. Veterinarians are central to delivering animal health, welfare, and public health, ensuring food and feed safety and enabling smooth and safe cross-border movement of animals and products.

The EU and UK veterinary professions have always worked closely, sharing expertise, surveillance data, and good biosecurity practice to manage disease risks and support public confidence. This collaboration must continue and the FVE fully supports all efforts to maintain and strengthen these links. The forthcoming Franco-British sector analysis project, with key facts, figures, and insights on trade, food security, and AgriTech innovation, will help identify ways to improve joint disease surveillance, mutual recognition of standards, and regulatory alignment. Through evidence-led guidance and practical recommendations, it can support veterinary services, authorities, and industry in enhancing cooperation across the agrifood system — empowering the role of the veterinary profession and benefiting society in delivering safe, sustainable, and resilient agrifood supply chains.

FVE
(Federation of Veterinarians of Europe)

Five years after Brexit, the smooth functioning of Franco-British agrifood trade rests on a dual requirement: regulatory alignment and sanitary preparedness. The initiative to establish a common SPS area offers a pragmatic perspective, provided that a high level of protection is ensured. On a day-to-day basis, however, it is the coordination of monitoring and surveillance systems that shapes the resilience of supply chains. The recent experience of avian influenza has underscored that early warning and technical dialogue—on both the French and British sides—are critical to preventing trade disruptions. It is the combined efforts of official veterinary inspectors, veterinary practitioners, and veterinary epidemiologists that ensure continuity between field operations and regulatory frameworks. Strengthening data sharing, training in cross-veterinary inspections, and mutually recognising standards help secure trade flows and uphold shared sanitary sovereignty. It also reasserts that food safety is built on alliances of trust, not on administrative barriers.

SNVEL
(Professional organisation of French veterinary practitioners)

II

Mastering Sanitary and Phytosanitary (SPS) Regulations

A key competitive advantage in food trade between France and the United Kingdom (UK)

Noam Gamondes
Business Development Project Manager
Getlink

Note: Although Northern Ireland is legally part of the UK customs territory, it applies, in accordance with the Windsor Framework, the sanitary and phytosanitary rules of the European Union (EU). This unique dual regime has made it possible to avoid the re-establishment of a physical border between the UK and the EU on the island of Ireland following Brexit.

Two demanding but distinct regimes for food trade between EU Member States and the UK

Since the UK's effective exit from the EU, companies trading agricultural and agrifood goods between EU Member States and the UK must adapt to two distinct SPS regimes on each side of the Channel.

For exports to the UK, imported agrifood products are subject to **control requirements that vary according to the risk category** assigned to the goods: high, medium or low risk.

For imports into the EU, 100% of regulated consignments (animals, products of animal origin, plants subject to restriction) from third countries **are subject to both documentary and physical control.**

The new SPS control obligations have weakened the price competitiveness of food products traded between the EU and the UK

1. Health certification of products and border inspection fees generate direct costs of several hundred million euros per year for companies

Exporting companies on both sides of the Channel must now have their products certified by approved veterinarians. The unit cost of a health certificate varies from €100 to more than €300, depending on the nature of the product and the service provider.

Another direct charge: border inspection fees, which finance the new infrastructure dedicated to the inspection of imported products subject to sanitary and phytosanitary control. These costs vary from a few dozen euros per lot to around one hundred euros in France and the UK.

At the macroeconomic level, these new formalities represent a significant cost for companies trading agricultural and agrifood products between the EU and the UK. **The British government itself estimates that SPS import controls on EU agrifood products entail a total additional cost of around £330 million per year.**

2. Indirect costs arise from logistical delays and administrative burden

Before Brexit, intra-European agrifood trade flowed almost freely. In September 2025, at Sevington (Kent), the main entry point on the British side for EU products transported by truck, **the average time a vehicle spent on site was 3 hours 17 minutes** (excluding the driver's mandatory break). In some peak periods or in the case of complex loads, the **total waiting time can exceed 5 hours.**

For transporters and customers, this waiting time translates **into equipment immobilisation costs** (trucks blocked), **staff costs**, and **increased energy consumption** (refrigeration units operating during the wait). In addition, late penalties frequently apply if delivery exceeds scheduled time slots, not to mention the potential loss of revenue for perishable goods if the use-by date is exceeded.

For ultra-perishable products, the impact can become critical: a few hours' delay is enough to alter their commercial value. This operational risk, difficult to quantify precisely, unfortunately leads some suppliers to stop exporting the most sensitive products or to significantly increase their prices to compensate for the uncertainty.

Furthermore, the need for additional human resources to manage customs and sanitary formalities is also an important cost factor for companies, especially since experts in sanitary and phytosanitary regulations are scarce and their training is lengthy.

Mastering SPS regulations limits operational obstacles and generates economic gains (case studies)

1. *Case study no. 1:* **The importance of flawless documentary compliance**

Getlink Customs Services, the division dedicated to customs and regulatory formalities within the Getlink group, intervened urgently to unblock a large amount of pork meat imported from the UK and held at the SIVEP (Veterinary and Phytosanitary Inspection Service at the borders) in the port of Calais. The health certificate presented a cross-out line without the veterinarian's initials. Any addition, deletion or correction on a health certificate must be countersigned and stamped by the certifying veterinarian; otherwise, the document may be rejected at the inspection post as invalid. **Thus, a single missing stamp on a modified box can immobilise an entire truck.** Although the transporter ultimately obtained a new compliant document with the assistance of Getlink Customs Services, they still lost half a day before continuing their journey.

This administrative rigour, although necessary to guarantee the authenticity of certificates, represents a real challenge for inexperienced operators. As a result, careful proofreading of certificates before shipment has become an essential step. Some companies have implemented internal quality checklists, and service providers such as Getlink Customs Services offer pre-verification services (concordance of HS codes, weights, official stamps, etc.) to avoid costly errors.

2. *Case study no. 2:* **The importance of combining sanitary and phytosanitary expertise with customs expertise**

Getlink Customs Services also assisted a French entrepreneur selling whey-based protein supplements, who found herself in great difficulty because a batch imported from the UK was blocked.

At the beginning of 2022, her first batch shipped from the UK was refused by the French SIVEP and sent back to the sender without clear explanation and with high administrative costs.

Upon analysing the case, Getlink Customs Services identified a double problem: on the one hand, **the customs code used was inadequate** (placing the product in a category requiring a more restrictive health certificate); on the other hand, **the British production site was not correctly registered with the British authorities** (incomplete approvals).

A plan of action was drawn up in collaboration with the entrepreneur:

- **On the British side,** update of factory approvals with the Department for Environment, Food and Rural Affairs (DEFRA), use of a specialised certifying veterinarian to review the product description and issue of a certificate compliant with the correct category.
- **On the French side,** revision of the customs code based on the exact composition of the product and support for the new import via Calais with a fully compliant file.

Outcome: The client was able to present her goods again at the border, pass SIVEP controls, and resume sales. However, she lost time, paid for two certifications instead of one, and bore additional logistical costs. This case illustrates the cost of the post-Brexit regulatory learning curve: an error in classification or approval can destroy the profitability of a shipment, hence the importance of expert support for SMEs from the design stage of an import or export project.

These two cases show that the main economic risk of sanitary and phytosanitary controls is not so much the payment of a €30 or £30 fee at the border, but rather the risk of an unforeseen delay or refusal that disrupts the logistics chain.

The key for traders and their logistic partners is therefore to anticipate and secure each step: quality of documents, choice of the correct corridor and inspection slot, close coordination with certifying veterinarians and customs and sanitary authorities.

The EU and the UK seek to adjust sanitary and phytosanitary regulations to strengthen the competitiveness and resilience of their food trade

1. More than five years after Brexit, the regained sovereignty in sanitary controls comes at a price: complexity and friction in trade

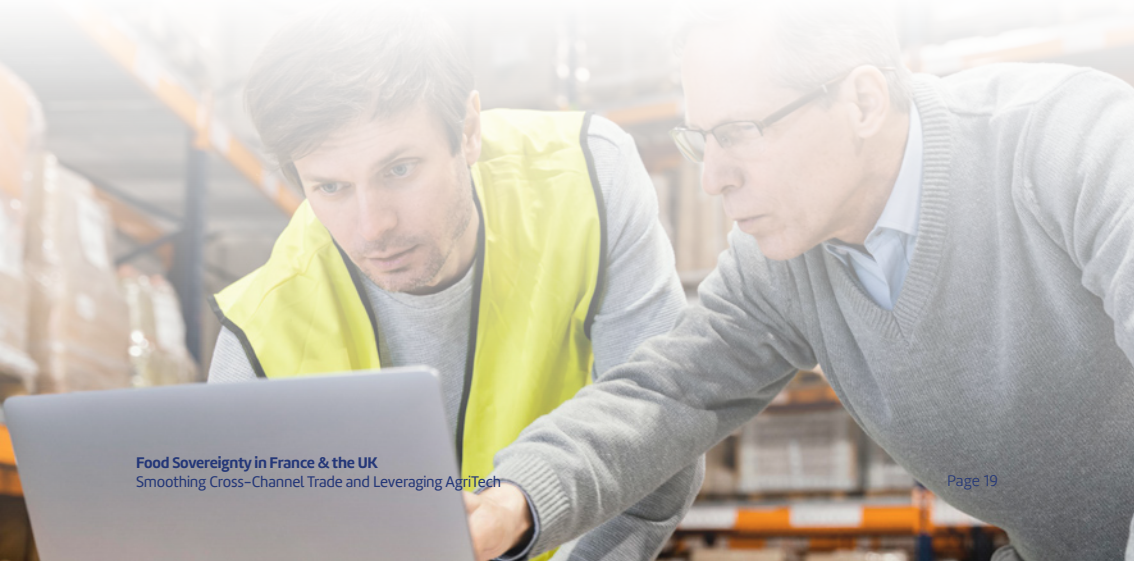
From the point of view of sovereignty and food traceability, the assessment is positive: both territories (EU and UK alike) now fully control what enters their borders and can apply their standards without compromise.

The EU has been able to preserve its very strict "sanitary shield" by controlling British products like any other third-country import (thus protecting its agricultural sectors from disease and external risks).

The UK, being a net importer in agricultural and agrifood trade with the EU, has been able to define a tailor-made regime adapted to its own risk assessment. Inspection frequencies are, for example, more flexible than those applied by the EU.

From a sanitary safety standpoint, no major incident has been reported: the certification and control systems in place have maintained a level of safety equivalent to the pre-Brexit period. **However, from an economic competitiveness perspective, the conclusion is more mixed.**

Border waiting times result in a decrease in logistical efficiency and increased costs that penalise companies and may ultimately raise prices for consumers. These costs amount to hundreds of millions of euros per year and have contributed to a contraction in certain agricultural and agrifood exchanges between the UK and the EU.



2. **Public authorities on both sides of the Channel are aware of this and are seeking solutions to mitigate these frictions without compromising food safety.**

Several optimisation measures have been identified so far:

Reinforcement of human and technical resources at control points: for example, France has recruited additional veterinarians (including foreign nationals thanks to a 2019 decree) and converted fixed-term contracts into permanent ones to stabilise SIVEP teams. The UK has improved the infrastructure at Sevington and launched an inter-ministerial project to optimise its use.

Bilateral cooperation and mutual recognition: this is the objective of the future joint SPS zone under negotiation. An agreement between the EU and the UK could lead to mutual recognition of certain standards and therefore remove the requirement for certificates for some low-risk products, or to shared controls (a lot inspected in the UK would no longer be systematically reinspected upon entry into the EU, and vice versa). This would drastically reduce compliance costs. The counterpart, however, would be closer regulatory alignment—a political dilemma between sovereignty and integration. Nonetheless, pressure from businesses seems to be pushing towards a compromise.

A pragmatic risk-based approach: while awaiting a potential agreement on a joint SPS zone, the UK is already adjusting its model to make it more sustainable. For example, it maintains the possibility of self-declaration of certain information and applies auto-validation for some low-risk lots to avoid overwhelming inspection sites.

In conclusion, the post-Brexit period has highlighted the importance of sanitary and food traceability controls, but also their operational costs, creating barriers in trade that was once frictionless. **The EU and the UK now seem to be seeking to rebuild a smoother trading space without compromising their regained sovereignty.**

In the meantime, companies must continue to invest in compliance to turn it into a competitive advantage: those that succeed in navigating this dual framework while minimising delays and extra costs gain an edge over less agile competitors. **At GCS, we enable our clients to turn these obligations into opportunities to achieve sustainable performance through flows that are safe, fast, and economically viable in the long term.**

In agricultural and agrifood trade between France and the United Kingdom, the issue is no longer merely the movement of goods, but the circulation of trust. Fish, meat, vegetables and dry products remain strategically important on both sides of the Channel, even as the regulatory, sanitary and documentary environment continues to evolve. In this context, the role of transport operators, logistics providers and customs declarants is decisive: they structure documentary compliance, ensure adherence to European Union and United Kingdom rules, and deliver end-to-end traceability, which underpins both food safety and the continuity of supply chains.

Such traceability is not an optional addition; it constitutes the operational evidence that reduces risk, facilitates inspection and secures accountability. It relies on rigorous customs risk analysis specific to sanitary matters, on control mechanisms and on dedicated inspection points, including SIVEPs, defined here as border posts for veterinary and phytosanitary checks. The quality of the work carried out in France, at the intersection of regulatory stringency and operational execution, deserves recognition. For a pan-European group such as Groupe Sterne, acting as a transport operator, logistics provider and customs broker, anticipating regulatory complexity, standardisation requirements and the ongoing evolution of control systems remains essential to fluidify trade flows, meet delivery commitments and safeguard food sovereignty.

Loïc Chavaroche
Chief Quality, Safety, Security, Environment, CSR-ESG,
Sterne Group

In the context of agricultural and agrifood trade between the United Kingdom and the European Union, BLR BELLEREAUX holds a strategic position at the heart of these flows, with a physical presence at the two main post-Brexit entry points: Calais and Dunkirk.

The perishable goods expert team at BLR BELLEREAUX ensures close and continuous regulatory monitoring, working in direct and ongoing cooperation with the relevant sanitary authorities (SIVEP and DGAL) to closely follow regulatory developments.

In our view, future challenges will mainly concern composite products, combining ingredients of both animal and plant origin. Their increasing complexity leads to varying regulatory interpretations from one inspector to another, and therefore to differing documentation requirements.

These challenges directly affect the acceptance or rejection of goods at the border. In the event of a refusal, the resulting logistical costs can have a significant impact on the client. This is why our long-term vision is to involve experts such as BLR BELLEREAUX upstream of the first border crossings, in order to clearly identify the applicable regulations and secure flows from the outset.

Clément Alloul
Managing Director, BLR BELLEREAUX (Groupe BBL)

III

Food security in a shared European food system: a UK perspective

Ged Manning
Agriculture and Food Security Attaché
British Embassy, Paris

Food security has become one of the defining questions for European agriculture, not because food has disappeared, but because the conditions that make food systems stable have become less predictable. Across the UK and France, agricultural policy is increasingly shaped by the same background pressures: climate volatility, animal and plant disease risk, pressure on labour and inputs, geopolitical disruption, and sharper swings in commodity prices. These forces are now structural rather than exceptional, and they are experienced in parallel on both sides of the Channel. They show that food security touches on our economic and national security.

Food security is best understood as the capacity of the food system to continue delivering safe, affordable and nutritious food over time, even as those pressures intensify. **That understanding aligns closely with the internationally recognised definition built around availability, access, utilisation and stability.** What has changed in recent years is the prominence of the final pillar. Stability has moved from the margins to the centre of policy thinking, shaping how risks are assessed and how resilience is pursued.

This way of thinking sits naturally alongside France's approach, where the underlying concerns are strikingly similar: maintaining productive capacity, ensuring fair and sustainable farm incomes, reducing exposure to critical dependencies, and preserving the ability to respond collectively to shocks. In practice, food security describes a shared response to well-understood European challenges — how to sustain agriculture, protect consumers and manage vulnerability in a more volatile world.

That shared challenge is visible in the structure of the UK and French food systems themselves. The UK imports a significant proportion of the food it consumes. France, while remaining a major agricultural producer and exporter, is also deeply embedded in European and global markets for inputs, processing and distribution. Supply chains for feed, fertilisers, veterinary medicines, breeding stock, packaging and logistics link the two countries directly and indirectly.

These interconnections matter because they shape how shocks are transmitted. When climate events affect harvests, when disease risks emerge, or when global markets for energy and fertilisers tighten, the effects are felt simultaneously across borders. Commodity price movements, in particular, have become a defining feature of food security. Sharp increases challenge household affordability and shift consumption patterns; sudden drops place pressure on farm viability and long-term investment. In both cases, resilience depends on how well the system absorbs volatility rather than on where national boundaries sit.

In practical terms, this matters at every stage of the food chain — from a producer in Scotland managing input costs and disease risk, through processors, hauliers and retailers navigating regulation and logistics, to a consumer in France for whom price, availability and trust in standards ultimately converge at the point of purchase.

This is one reason why food security has become inseparable from broader economic and security considerations. In both the UK and France, recent debates have highlighted that food security is not only about production, but also about accessibility and confidence. Consumers experience insecurity through prices and availability; farmers experience it through income uncertainty and exposure to costs they cannot fully control. Managing these tensions requires coordinated responses across the value chain.

Trade plays an essential part in this picture. The UK–France agrifood relationship is long-standing and highly complementary. French producers supply the UK with high-value products that reflect France's agricultural strengths, while British producers contribute well-established seafood, meat and dairy products that support French consumption and processing. These flows are not incidental; they are part of a shared food economy that has developed over decades.

Since the reconfiguration of UK–EU trading arrangements, this relationship has had to adapt to new administrative and regulatory realities. Additional certification, inspections and procedures are now part of the everyday functioning of trade. For many businesses, this has required adjustment and investment. For some, particularly smaller operators and those dealing in perishable goods, the added complexity has narrowed margins and limited participation.

From a food security perspective, the significance lies not in the presence of controls, but in how they operate. High sanitary, phytosanitary and welfare standards are a shared asset for the UK and France, underpinning consumer trust and protecting production systems from systemic risk. Where regulatory frameworks are predictable and well aligned, they support resilience by allowing supply chains to plan, adapt and recover more effectively from shocks.

This is why cooperation on regulatory implementation, including SPS arrangements, is increasingly discussed as part of the food security landscape. The aim is not to dilute protections, but to ensure that controls function efficiently for authorities and operators on both sides. Reducing duplication, improving predictability and focusing resources on genuine risk strengthens the capacity of the system as a whole. For farmers, veterinarians, processors and retailers in both countries, this translates into greater confidence rather than weaker oversight.

The Channel itself illustrates this dynamic clearly. It operates as one of Europe's most important food corridors, carrying time-sensitive and tightly regulated goods in both directions. Its reliability matters for consumer access, for farm incomes, and for the resilience of processing and retail systems. When this corridor functions smoothly, it absorbs stress elsewhere in the system. When it becomes unpredictable, pressure accumulates rapidly across supply chains.

Looking ahead, the UK's approach to food security remains grounded in this shared European reality. Domestically, it will continue to focus on sustainable productivity, innovation, biosecurity and transparency around risk. This includes the contribution of AgriTech, which in the UK is increasingly treated as part of the wider industrial strategy guiding economic priorities over the coming decade, reflecting its role in productivity growth, resilience and the long-term sustainability of essential systems. Internationally, the UK will prioritise engagement on the drivers of instability that no country can address alone: climate change, disease, conflict, volatile input markets and sudden trade disruption.

For the UK and France, the implication is not that one model should replace another, but that resilience is built most effectively when complementary approaches reinforce one another. Food security and food sovereignty, in their practical expression, converge on the same objective: a food system that is robust, fair and capable of withstanding uncertainty. One that sees food security and national security as two of the same.

Indeed, in a world where volatility is becoming the norm, the strength of European food security will increasingly depend on how well neighbouring systems align their efforts, maintain high standards and keep essential food corridors functioning. For the UK, working alongside France within that shared system is not simply advantageous; it is integral to the resilience of both our countries.

As Sodiaal's leading export market, the United Kingdom is an eminently strategic destination where we combine two types of activities. The first is through our Yoplait brand, which enables us—via our Petits Filous line—to hold a leading position in the children's yogurt segment. The second is through our 'Sodiaal Dairy International' (SDI) operations, which allow us to export—through our Entremont, Candia Professional, and Douceur de France brands—cheese, butter, and cream, primarily for foodservice professionals. Overall, the United Kingdom accounts for 17% of Sodiaal Cooperative's export revenue.

As a net importer of dairy products, the United Kingdom is a long-standing trading partner for Sodiaal. Our products, such as Comté and Roquefort, continue to be highly valued by consumers seeking high-quality products and the expertise of French regional know-how.

Frédéric Chausson

Head of External Relations and Sustainable Development, Sodiaal

Vodafone is a global connectivity provider, and partnerships are central to everything we do. Strong collaboration enables growth across the digital ecosystem and supports a more resilient Europe. In line with the objectives of the Franco-British Chamber of Commerce and Industry (FBCCI) and the shared societal values of our two nations, we see opportunities for partnership: particularly in agriculture.

Take IoT as an example. Vodafone IoT has millions of SIMs deployed worldwide in agriculture-related solutions. In France, our technology supports farmers through telematics for agricultural machinery, monitoring of animal feed systems, bovine birth alert solutions, environmental monitoring, food quality testing, smart rodent control, and industrial refrigeration.

These innovations are unlocking data-driven farming. With seamless connectivity, farmers can integrate real-time insights from sensors, Near Infrared analysers and feeding systems to boost efficiency. This reduces costs, increases productivity, and enhances sustainability.

The same insights also benefit adjacent sectors such as supply chain, machinery maintenance, and food processing, adding value across the entire ecosystem. Strategic partnerships, combined with risk-based safeguards and investment in European capabilities, are essential to building a sovereign, secure, and competitive Europe. Vodafone looks forward to working with FBCCI members, policymakers, and like-minded partners to drive this vision forward.

Marika Auramo
CEO, Vodafone Business

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United Kingdom and France, leaders in AgriFoodTech

Marie-Cécile Damave
Head of Innovation and International Affairs
Agridées

In the past decade, significant research, development, and innovation has emerged in agriculture and food production, not only in large companies and public research organisations, but also in innovative startups.

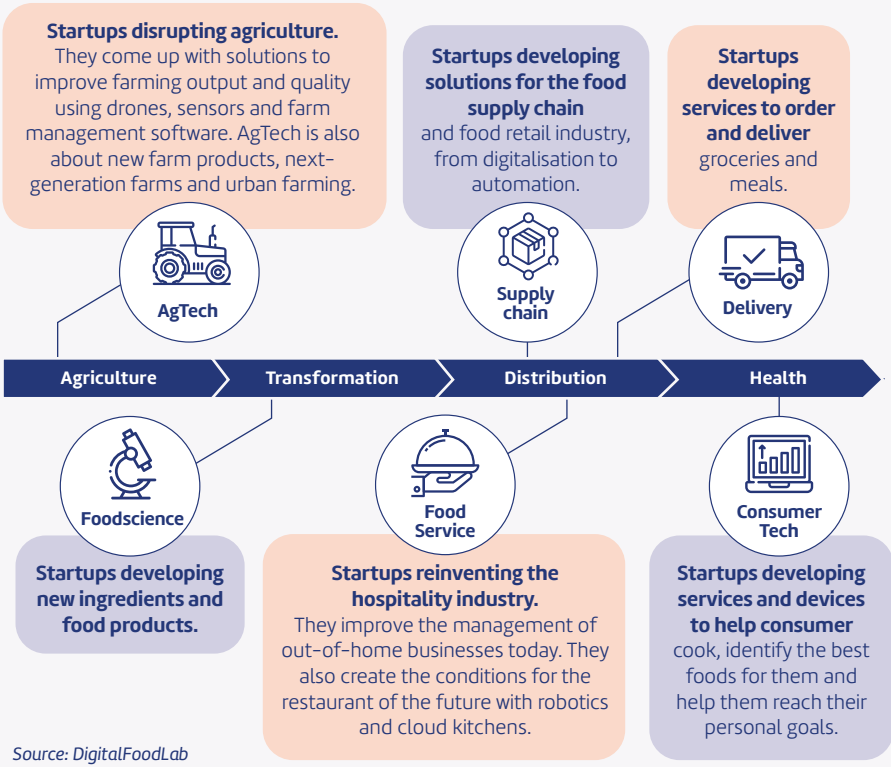
AgriFoodTech encompasses a range of technologies across the entire food chain and is spreading worldwide. AgriTech (or AgTech), which is more closely linked to farmers, includes solutions to improve farm production (e.g., biosolutions, digital solutions such as farm management software, sensors, drones, robots, new agricultural products, and vertical farms). FoodTech includes solutions further downstream in the value chain: innovative ingredients and food products, digitalisation and automation of the supply chain and distribution, food and meal ordering and delivery services, as well as consumer-oriented technologies (meal preparation, personalized nutrition)[1].

[1] *DigitalFoodLab (2025) Investments, innovation hubs and trends report on the State of the European FoodTech ecosystem*

Figure 1

What is AgriFoodTech?

DigitalFoodLab's definition is: "FoodTech is the ecosystem made up of all the agrifood entrepreneurs and startups (from production to distribution) innovating in terms of products, distribution, marketing or business model."



Source: DigitalFoodLab

In Europe, the United Kingdom and France are among the countries where these investments are most dynamic and significant.

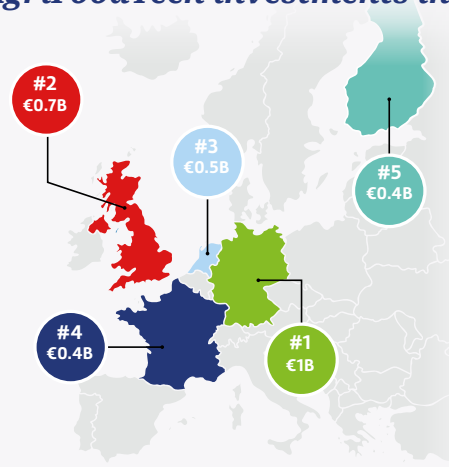
Globally, investment in AgriFoodTech startups has ranged from $10 billion to $35 billion since 2015, and peaked in 2021 at $56 billion. Investment at the European level has followed this trend, ranging from €1 billion to €4 billion, with a peak in 2021 at €10 billion.

In 2024, investments in AgriFoodTech in Europe amounted to €4.1 billion, representing 28% of global investments estimated at $15 billion. Germany, the United Kingdom, the Netherlands, France, and Finland are the five leading countries in AgriFoodTech in Europe.

[2] AgFunder (2025) Global AgriFoodTech Investment report

Figure 2

European countries leading AgriFoodTech investments in 2024



Source: DigitalFoodLab

There are differences in how funding is spread out in each country. In the UK, investments were mainly in food science (36%), delivery (30%), and AgriTech (22%) in 2024. In France, AgriTech attracted the lion's share of investment (44%), followed by food science (29%) and delivery (13%) in 2024.

The AgriTech startup that received the largest investment in the UK in 2024 was GrowUp Farms, with €43 million. This company produces salads in controlled conditions, without pesticides, in locally based vertical farms using renewable energy, all year round.

The AgriTech startup that received the largest investment in France in 2024 was Elicit Plant, with €45 million. It develops solutions based on a technology using naturally sourced phytosterols to help field crops withstand periods of water shortage until harvest.

Diversity of innovation systems

These innovation dynamics are made possible by vibrant, structured innovation ecosystems rooted in local areas, providing fertile ground, not only for startups, but also for larger companies, agricultural organisations, and public research bodies, working closely with farmers and on the ground. In France, competitiveness and innovation clusters are essential ecosystems for creating networking opportunities; supporting dynamic entrepreneurs; developing, improving & testing innovative solutions; and building private-private or public-private partnerships. These are essential for deploying AgriTech innovations. One example in France is Bioeconomy for Change (B4C), a competitiveness cluster specialising in the bioeconomy and acting as a catalyst for bio-based innovation and its industrialisation at the regional level. B4C supports the development of more efficient, less polluting, and less toxic processes and products.

Agridées and the British Embassy in Paris brought together the French and British bioeconomy ecosystems in March 2018 in a jointly organised conference "Innovating for the future: the bioeconomy in the UK and France." This event coincided with the launch of both countries' national bioeconomy strategies. It provided an opportunity to exchange views not only on policy guidelines, but also on business, R&D and innovation approaches to the bio-based economy. The B4C cluster (then known as IAR - Industrie et Agro-Ressources) was naturally among the French organisations participating. On the British side, the Biorenewables Development Centre (BDC) was present. The BDC is an research, developement and demonstration centre for biorefineries, aiming to optimise the use of renewable and bio-based products for producing chemicals, materials, and fuels.

There are many other AgriTech innovation ecosystems in France and the United Kingdom. One example is Agronov, an agroecology innovation hub based in Dijon, which is a flagship and rallying point in the Bourgogne-Franche-Comté region (see the contribution from its Director, Liselore Martin, p. 34-37). Another example is the Terrasolis innovation hub, based in the Grand-Est region. Terrasolis supports the low-carbon transition of players in the agricultural sector with the aim of achieving carbon neutrality by 2050 through concrete and strategic solutions for the future. In June 2025, Terrasolis and Agridées jointly organised the conference "Territorial Bioeconomy, Challenges and Realities," highlighting several innovative initiatives in renewable energy, biomaterials, and environmental services production thanks to the commitment of farmers and their partners in the bioeconomy.

AgriTech is emerging in the United Kingdom, as in France, through the deployment of digital technologies in agriculture. Ten years ago, Agridées and the British Embassy in Paris jointly organised the event "Farms of the Future: Big Data and Precision Agriculture" (October 2016). AgriTech ecosystems were just beginning to take shape, but British AgriTech centres were already present with Agrimetrics (specialising in big data applied to agriculture) and Agri-EPI (precision agriculture, robotics). Today, the UK AgriTech Centre is the agricultural innovation centre that supports commercially viable solutions and their adoption, in collaboration with agricultural and food production stakeholders, businesses, public authorities, and world-renowned research institutes to accelerate impactful AgriFoodTech innovations.

With the current geopolitical, climatic, and economic constraints, France and the United Kingdom need more than ever to come together and stimulate innovation in agriculture and throughout the agro-industrial value chain to achieve greater food sovereignty. This also applies to farmers' performance and resilience. As entrepreneurs, they must adopt long-term strategies to manage their operations. Pooling the technological strengths and complementarities of our two countries can only strengthen and unite the stakeholders in already high-performing ecosystems in a long-lasting way to address these shared challenges.

Contribution of new technologies to collaboration between French and British agriculture

Liselore Martin
Director of AgrOnov, agricultural innovation park AgrOnov

The agricultural challenges facing France and the United Kingdom overlap in terms of adapting to climate change, reducing inputs, the environment and transforming economic models regarding farms and their critical size. While France has always been a major exporter, the United Kingdom imports 40% of its food. France's trade balance is fragile and heading towards a deficit, as Agridées pointed out in its analysis in autumn 2025. This also brings the challenges facing the two countries closer together. The complementary nature of our agricultural sectors is an obvious lever for collectively addressing these challenges.

What strengths can be pooled to meet the challenges facing agriculture?

As a hub of innovation in agroecology, with a model that is unique in France, combining a site and research and experimentation skills, players from the agricultural world and innovative companies, AgrOnov is working, among other things, on the benefits of new technologies for agricultural transitions.

From low-carbon agriculture to biotechnologies for reducing inputs and preserving biodiversity, including soil understanding and water resource management, the association aims to accelerate agricultural transitions by creating links between needs and skills to bring about new solutions. AgrOnov connects ecosystems at regional, national and international levels.

Structured and powerful ecosystems

Innovation ecosystems are a common feature of both France and the United Kingdom, with stakeholders committed to the same objectives, driven by recognised structures, and whose actions are supported by public policies.

France has put technological startups in the spotlight through "La Mission French Tech" and the comprehensive ecosystem supporting French entrepreneurs. Created in 2013, the French Tech Mission is the government agency responsible for implementing public policies aimed at start-ups and bringing together the French startup ecosystem, both in France and internationally. The term French Tech refers to startups and the players that surround them. French Tech leads calls for projects and certifies startups to benefit from dedicated support and funding. With more than 245 startups supported in national programmes and a rich Agritech ecosystem, the innovative technological solutions deployed in France can meet, for example, the needs of traceability and food safety. FoodPilot is a company whose mission is to provide an all-in-one solution that facilitates the sustainable transition of companies in the agrifood sector. The data used is real and verified to ensure an accurate and reliable approach, enabling users to effectively manage their environmental and social commitments and, above all, to assess their impact.

The French ecosystem is also structured to bring together expertise in robotics, both in terms of technology and regulation. This work can save valuable time when it comes to labour issues. The RobAgri association, created in 2017, specialises in this subject and created the FIRA, the International Forum for Agricultural Robotics, in 2016. Since then, the GOFAR association has taken over the organisation of this forum, and much more. GOFAR aims to promote and develop the agricultural robotics sector internationally to meet a real need for visibility and networking in the agricultural robotics sector. The Syletkis company is a good example: it has developed an asparagus harvesting robot incorporating FANUC technology, a leader in industrial robotics. With high-quality production that detects asparagus ready for harvesting and addresses labour issues, Sylektis is contributing to the relocation of market gardening production.

The United Kingdom is investing heavily in modern technologies and developing advanced solutions (genome editing, bio-inputs) and has a strong biotech agricultural industry that can also feed into research work in France. Given the long development time required for a biosolution to reach the market, collaborations in this area would be beneficial.

While the United Kingdom is a strong country in biotechnology, France can provide a first-rate testing ground, structured with competent players who have valuable references on data from a wide variety of territories. This makes it a rich resource for the agroecological transition. The different climates between the two territories are also a major point of interest for sharing experimental results and data. While the south of France can provide insights into drought conditions, the United Kingdom can provide keys to disease resistance in high humidity conditions.

Public–private partnerships and technologies serving the sovereignty of territories

Collaboration between public and private actors is as functional in France as it is in the United Kingdom. Take, for example, the Hydroglen project, developed in Scotland, involving Water to Water, a company, and The James Hutton Institute for scientific services. This project was supported in 2022 by the Scottish Government's Just Transition Fund. The aim is to create 'hydrogen hubs' in rural areas and farms.

By reducing their dependence on the electricity grid, agricultural and rural areas will be better able to cope with energy price volatility, power cuts and potential shortages. This aims to have a very positive impact on food security in the United Kingdom. It is a full-scale pilot project that can inform discussions and projects on decarbonisation in the agricultural and food sectors in France. In addition, AgrOnov is currently working on a feasibility study for such a system in the Bourgogne-Franche-Comté region, looking at the energy consumption of farms and their renewable energy installations. This project involves the French livestock research institute IDELE and Water-To-Water and is a fine example of public-private collaboration between France and the United Kingdom.

Artificial intelligence solutions are used by engineering consultancies in France to assess the impact of projects on biodiversity. Once again, the benefits of collaboration are clear, especially as this type of project is likely to multiply more rapidly in the United Kingdom once the results of the pilot have been obtained. Artificial intelligence is advancing rapidly, and these technologies are of great interest for assessing the impact of a choice before implementing it in the field, in a digital twin model. This is valuable for agriculture and eliminates the risk-taking effect. Netcarbon can simulate the benefits of agroecological infrastructure for carbon storage in agricultural plots, but also for regional and municipal planning and infrastructure choices. This addresses the challenges of biodiversity, biosecurity and, above all, the challenge of simulation to make informed choices that are valid in the long term. It is a technology with significant potential in the United Kingdom, where reducing greenhouse gas emissions is a priority.

Synergies in the winegrowing and livestock sectors

If we now analyse the possible connections by sector, we see a significant gain for the UK wine industry. According to a study by Business France (July 2024), "in 2022, the United Kingdom produced 8.3 million bottles of sparkling wine and 3.9 million bottles of still wine, for a total of 12.2 million bottles, reflecting the rapid growth of the wine sector (+40% since 2020). What's more, the outlook is promising, with wine production in Great Britain estimated to reach between 25 and 29 million bottles by 2032." With the climate being unpredictable, vineyard protection technologies that have already been tried and tested in France have a promising future in the UK. BIENESIS, for example, was recently awarded the

Best Innovation Award at CES in Las Vegas in 2025, the highest distinction in the FoodTech/AgriTech category. Research into resistant grape varieties and the genomic characteristics of vines can accelerate positive results in the field.

In the livestock sector, the United Kingdom stands out for its sheep population, and discussions on protein self-sufficiency in livestock farming can be grouped together and shared, particularly regarding fodder seeds, their adaptation to the climate, and even the deployment of agrivoltaics. Mixed farming is one of the most impactful levers for agroecological transition, if experiences were shared. On the issue of animal welfare, which is also linked to biosecurity and the quality and quantity of production, France is not lagging in terms of progress. Take Obione, for example, a company specialising in the health, nutrition, welfare and management of farm and companion animals. Obione is recognised for the quality of its services, training, livestock interventions and products, but also for its expertise in promoting 'happy' livestock farming through its 'Happy' initiative. When it comes to food safety in dairy products, there are numerous quality standards in place to guarantee the necessary hygiene. DELIN, a company based in Côte d'Or, focuses on production and pays farmers more, providing them with a decent income that also allows them to invest in innovative tools to detect anomalies in production at the farm level, such as analysis tools directly linked to milking robots. Better health management limits the use of antibiotics, which is crucial for public health.

Finally, and this is true in all agricultural sectors, the success of the controlled designation of origin scheme could also be an interesting connection point for ensuring food safety, and new technologies are bringing automation to controls and monitoring.

In conclusion, it should be noted that, as France is a supplier to the United Kingdom, the new technologies used in agriculture on our territory will in fact contribute to the issue of safety and transparency for importing countries. Collaboration between the two countries could provide numerous opportunities to jointly address the challenges of adapting to climate change by sharing experience and results, and therefore data, tools and new technologies used, and finally, the organisational structures of the actors or support mechanisms put in place.

Orange's Vision and Experience with Smart Agriculture within Agridées

As a key player in digital transformation, Orange supports innovation in agriculture through the Agridées initiative. Smart agriculture, integrated into this initiative, enables resource optimisation, increased productivity, and sustainability. Technical advancements such as precision machinery, drones, and robots improve working conditions and product quality. The progress in data exchange along the entire value chain, supported by European and national reforms, enhances trust and transparency in agricultural exchanges.

On a European level, France faces shared challenges related to food sovereignty amid climate and demographic pressures. Trade between our countries in the agrifood sector is growing but requires innovative solutions to ensure food security. AgriTech, with AI, hybrid connectivity, and secure data management, plays a vital role in strengthening the resilience of agricultural supply chains.

Orange Business is committed to supporting these sectors by providing technological solutions that respect security, sovereignty, and trust. Our focus on hybrid connectivity, AI, and data security helps promote best practices while ensuring compliance with regulations. Public-private collaboration, driven by innovation, is essential to building a sustainable, competitive, and sovereign agricultural future.

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