

Bwyd a Diod Cymru
Food & Drink Wales

Welsh Food and Drink Economic Appraisal – 2025

The Gross Value Added (GVA) figures haven't been included in this release due to the postponement to September 2026 of the 'Regional economic activity by gross domestic product, UK: 1998 to 2024' data by the Office for National Statistics. We will update this release with the GVA figures as soon as possible.

Food Foundation Sector

The Welsh food foundation sector incorporates food and drink businesses that produce, process, manufacture and wholesale food and drink goods, including secondary businesses required in the food and drink industry[1].

In 2025 the sector saw an increase in turnover from 2024, increasing by £811.3m (8%) from £10.2bn to £11.1bn. This increase came from select sub-sectors such as drinks and wholesale, whilst others, namely prepared animal feed saw a decrease in turnover. Some of these sub-sectors are explored further, later in the appraisal. Over the longer term, the sector has seen growth in turnover, increasing by £2.9bn (35%) from £8.2bn in 2019.

There were 1,520 local business units in the sector in 2025, a decrease of 15 units from 2024 but an increase of 115 since 2019. 73% of the business units within the sector were classified as micro (employing fewer than 10 people) in 2025, the same as in 2024. This is similar to the other UK nations, with England at 74%, Northern Ireland at 71%, and Scotland at 67%.

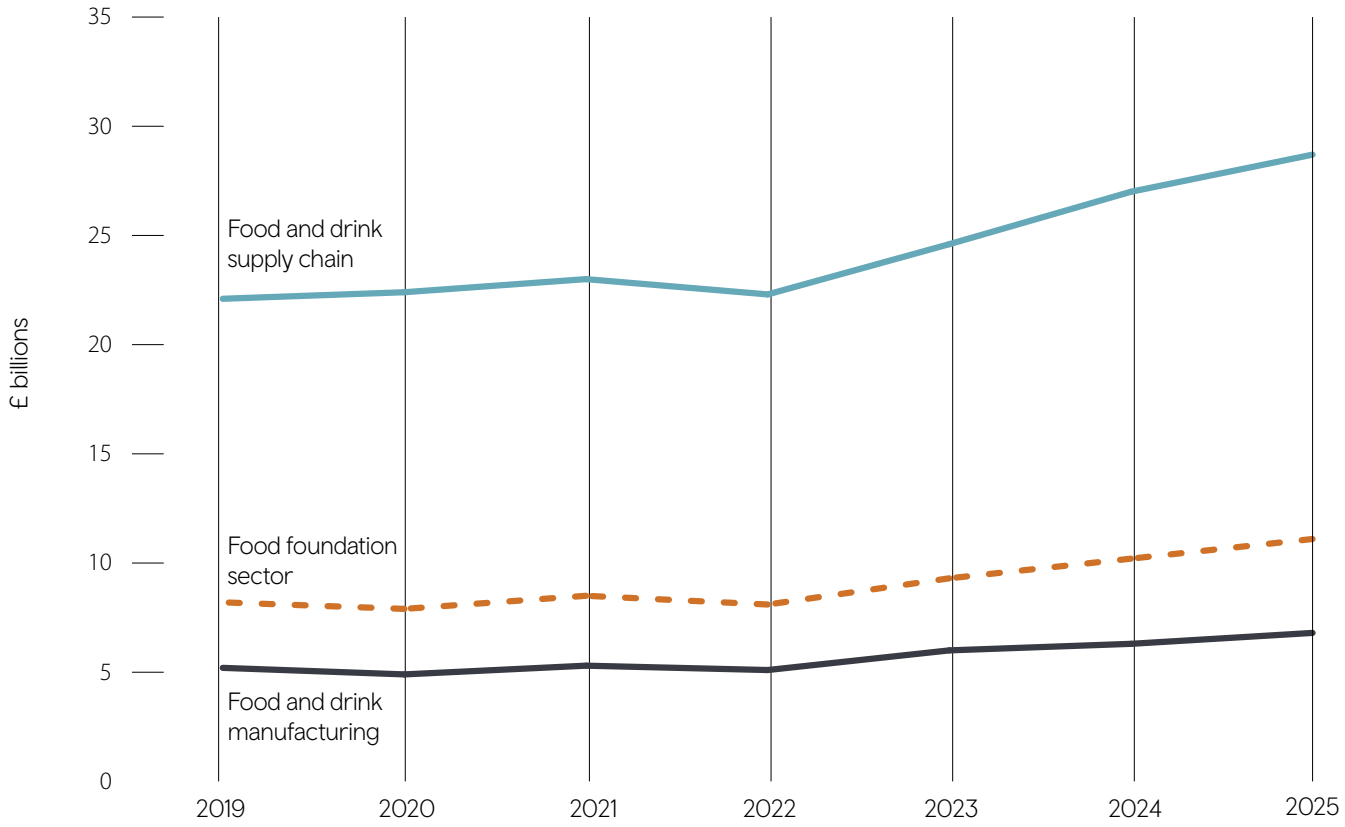
Across the remaining business units in Wales for the sector, 17% were small (employing between 10 and 49 people), 8% were medium (employing between 50 and 249 people) and 2% were large (employing at least 250 people). There were 90 (7%) Welsh businesses in the sector that had a turnover greater than £10m in 2025.

The sector employed 38,000 people in 2024, a 5% decrease from 40,000 in 2023. 89% of employees in the sector worked full-time equivalent (FTE). The median salary for the sector in Wales was £30,028 in 2025, an increase of £2,455 (9%) from £27,574 in 2024. Across the same time period, UK median earnings increased by £1,223 (4%), from £31,534 to £32,757. 77% of all workers in the sector earned at or above the Real Living Wage in 2025, an increase from 74% in 2024.



1 Such as the manufacture of plastic and glass products used in the food system. A full breakdown of the categories that make up the foundation sector can be found in The Food and Drink Foundation Sector Definition.

Turnover by sector 2019-2025, (£ billions)



Source: Welsh Government analysis of the Inter-Departmental Business Register (IDBR).

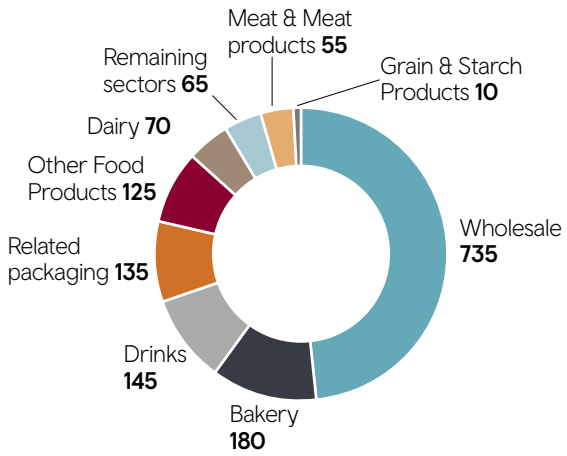
The number of business units decreased by 15 from 2024 to 2025, with most of this decrease coming from there being 10 less micro businesses. In the longer term the number of business units in the sector has increased by 115, with 115 new micro business units, with very little change in the number of small, medium and large business units.

In 2025, 31% of employees in the sector worked for medium sized businesses, 50% for large businesses, with micro and small sized businesses having a much lower employment share of the market, at 19%.

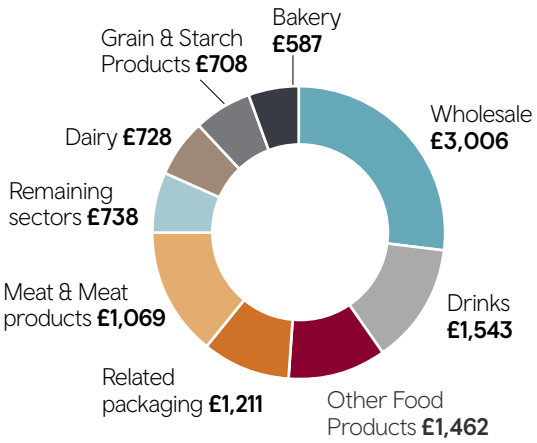
The sub-sector which had the largest growth in business units from 2019 to 2025 was wholesale, with 70 new units with almost all of these being micro business units, the largest micro business growth out of all sub-sectors.

In 2025, 875 (70%) of Welsh businesses in the food foundation sector had a turnover of less than £1m. This 70% of businesses accounted for 11% of employees and 3% of the turnover in the sector. 90 (7%) of Welsh businesses in the sector had a turnover value greater than £10m. These businesses accounted for 70% of employees and 82% of turnover. A full breakdown of businesses, employees and turnover by turnover band is available in Appendix A.

Food foundation sector local unit counts by sub-sector, 2025



Food foundation sector turnover by sub-sector (£ millions), 2025



Source: Welsh Government analysis of the Inter-Departmental Business Register (IDBR).

Food foundation sector business units, turnover and employee count by employee size, 2025

Business size	Local Units 2025	% of Total Units	Turnover 2025 (£m)	% of Total Turnover	Employees 2025	% of Total Employees
Large (250+)	30	2	5,532	50	18,100	50
Medium (50-249)	120	8	3,478	31	11,100	31
Small (10-49)	265	17	1,355	12	4,400	12
Micro (0-9)	1,110	73	686	6	2,500	7
Total	**1,520**	**100**	**11,051**	**100**	**36,200**	**100**

Source: Welsh Government Analysis of the Inter-Departmental Business Register (IDBR). The employee figures in this table are taken from the IDBR, unlike the employee figures discussed during the other sections of this report, which are from the Business Register Employment Survey (BRES). BRES data is recommended to be used over the IDBR when discussing employee figures, however for the purposes of comparing employee figures across business sizes, IDBR employment data has been used. The 'Remaining Sectors' category includes prepared animal feed, fruit and veg, and fish and crustaceans.

Food and Drink Supply Chain

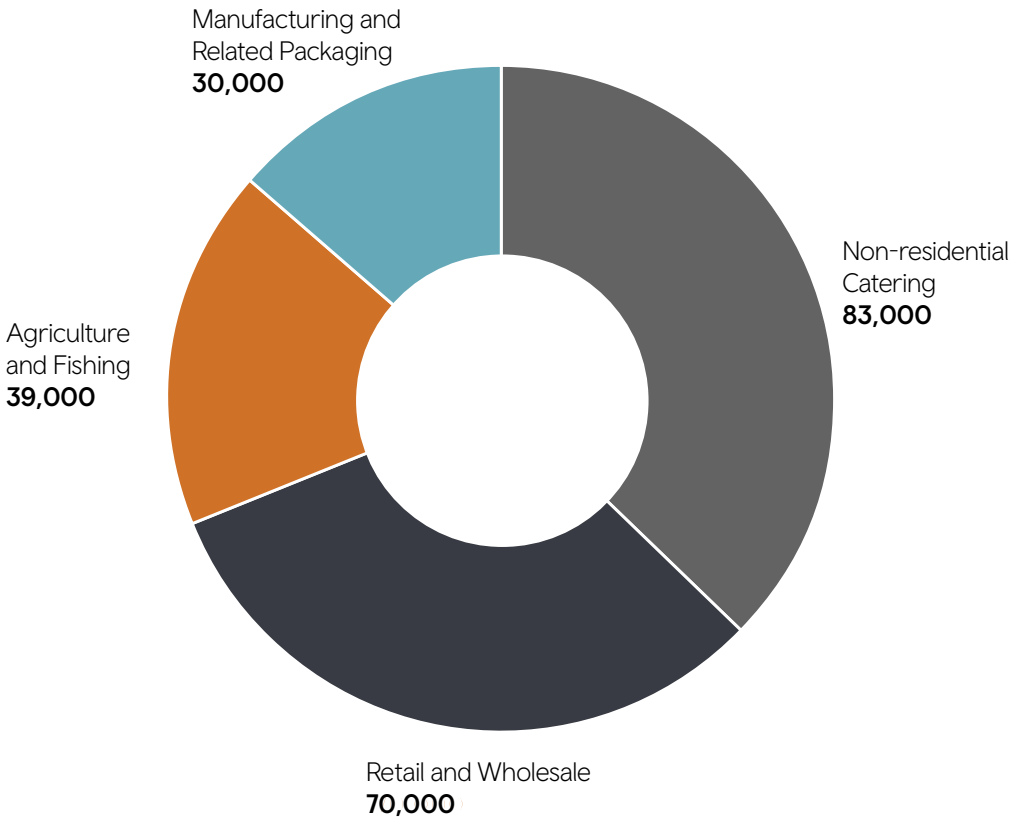
The Welsh food and drink supply chain also saw growth in 2025, this sector contains manufacturing and related packaging, agriculture and fishing, retail and wholesale, and non-residential catering. Businesses in the sector had a total turnover value of £28.7bn in 2025, an increase of £1.7bn (6%) from £27.0bn in 2024. Exports increased in 2025 compared to 2024, rising from £838.9m to £954.5m an increase of £115.5m (14%)[2].

The number of business units in the sector dropped slightly, decreasing by <1% from 28,085 in 2024 to 28,020 in 2025. 85% of the business units within the sector were classified as micro in 2025, the same as in 2024. Compared to the other UK nations Wales had the second highest proportion of micro businesses in the food and drink supply chain, with Northern Ireland at 89%, Scotland at 79%, and England 78%.

In 2024 the supply chain employed 222,000 individuals in Wales – a 1% decrease from 2023 – accounting for 16% of Wales' total workforce. 47% of employees in the sector worked full-time equivalent (FTE) an increase from 46% in 2023. Median annual earnings in the sector for 2025 were £21,320, increasing by £2,724 (15%) from £18,596 in 2024. The UK median salary for the sector was £22,882 in 2025, which increased by £898 (4%) from £21,985 in 2024. 58% of employees in the sector earned at or above the Real Living Wage in 2025, an increase from 52% in 2024.

Welsh food and drink continued to expand its award-winning products, winning 153 Great Taste Awards in 2025, a decrease of 10 from 163 in 2024. Wales had 24 protected food names as of April 2026. This is the same as in 2025.

Food and drink supply chain sub-sector employment, 2024



Source: Welsh Government analysis of the Business Register and Employment Survey (BRES).

2 Export figures are based on the Food and drink annual export in goods: 2025 publication, of which was published on the 14 May 2026.

Food and Drink Manufacturing

The Welsh food and drink manufacturing sector in 2025 experienced an increase in turnover by £502.6m (8%) from 2024, increasing from £6.3bn to £6.8bn.

The sector employed 25,000 in Wales in 2024, a 4% decrease from 26,000 in 2023. 92% of employees in the sector worked full-time equivalent (FTE). The median salary for the sector in 2025 was £28,381, an increase of £1,972 (7%) from £26,409 in 2024. The UK median salary for the sector was £32,269 in 2025, which increased by £1,319 (4%) on the year prior. 74% of individuals in the sector earned at or above the Real Living Wage in 2025, an increase from 69% in 2024.

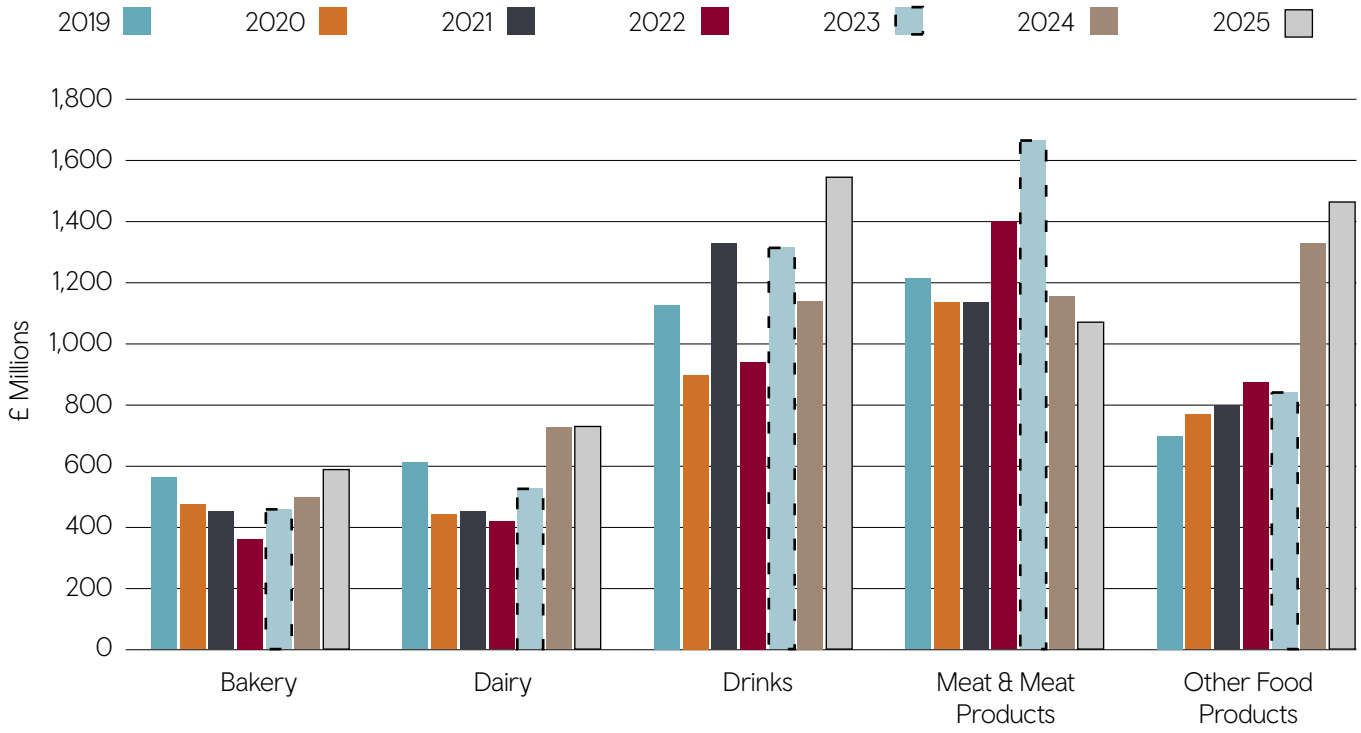
There were 650 food and drink manufacturing business units in Wales in 2025, a decrease of 15 from 665 in 2024.

69% of the 650 business units were classed as micro, 18% small, 10% medium and 4% were large. Compared to the other UK nations Wales had the joint highest proportion of micro businesses in the food and drink manufacturing sector, with England at 69%, Northern Ireland at 64% and Scotland at 61%. There were 45 (8%) Welsh businesses in the sector with a turnover greater than £10m in 2025.

In 2025 the business birth rate was 10% in the sector with 57 new businesses, down from 11% in 2024. The 5-year survival rates for businesses in the sector from 2020-2025 was 46%, a decrease from 48% between 2019-2024.

Over the longer-term, the sector has seen strong growth; turnover increased by £1.6bn (30%) from £5.2bn in 2019 to £6.8bn in 2025. Median annual earnings in the sector for 2025 was £28,381, increasing by £6,810 (32%) from £21,571 in 2019. The UK median salary for the sector increased by £8,213 (34%) from £24,056 in 2019 to £32,269 in 2025.

Turnover by food and drink manufacturing sub-sector, 2019-2025 (£ millions)



Source: Welsh Government analysis of the Inter-Departmental Business Register (IDBR).

Meat and Meat Products

The Welsh meat and meat products sector had a turnover of £1.1bn in 2025, a decrease of £83.6m (7%) from £1.2bn in 2024.

The sector employed 5,000 individuals in 2024, the same as in 2023. 90% of the employees in the sector in 2024 worked full-time equivalent (FTE), the same as in 2023. The median wage for the sector in 2025 was £27,161, an increase of £4,180 (18%) from £22,981 in 2024.

There were 55 business units in the sector in 2025, a decrease from 60 in 2024. Up to the 31st December 2025 the number of establishments approved for handling, preparing or producing meat products was 36 for red meat and 20 for poultry. This is a decrease from the previous year, which had 37 for red meat and 21 for poultry.

The total value of exports for meat and meat products in 2025 was £360.3m. This is comprised of £123.0m of live animal exports, and £237.3m of meat products. This is an increase of £67.6m (23%) from £292.7m in 2024. Individually, the exports of live animals increased by £34.6m and meat products increased by £33.0m from 2024.

According to Hybu Cig Cymru (HCC), in 2025 exports of sheep meat of Welsh origin were worth approximately £223.8m, which alongside offal were estimated to be worth a total of £230.5m. Approximately £215.0m (96%) of exported sheep meat went to the EU. Exports of Welsh beef in 2025 were estimated to be worth £102.5m, which alongside offal were estimated to be worth a total of £112.4m. Approximately £95.0m (92%) of exported beef meat went to the EU.

Retail spend on meat in Wales increased by £36.4m (4%) from £838.1m in 2024 to £874.5m in 2025. In comparison, the GB total increased by £1.2bn (7%) from £15.4bn in 2024 to £16.6bn in 2025.

In retail, fresh meat held the highest share of the meat categories, with the share increasing from 37% in 2024 to 38% in 2025. This category is followed by cooked meat (19%), and fresh poultry (19%). These three categories accounted for 76% of retail spend on meat.



> The median wage for meat and meat products in 2025 was £27,161, an increase of £4,180 (18%) from £22,981 in 2024.

Drinks

The drinks sector in Wales had a turnover of £1.5bn in 2025, an increase of £405.2m (36%) from £1.1bn in 2024. The sector has also seen a similar increase over the long term, increasing by £418.1m (37%) from £1.1bn in 2019. The drinks sector continues to see large fluctuations in turnover year-on-year which started in 2019, the mean change since 2019 has been £333.1m.

The sector employed 2,000 individuals in 2024, a decrease of 20% from 2,500 in 2023. 88% of the employees in the sector worked full-time equivalent (FTE), a decrease from 90% in 2023. The median salary for the sector was £25,153 in 2023, a £7,920 (24%) decrease from £33,073 in 2020. The UK median salary for the sector in 2023 was £37,359 a £3,227 (9%) increase from £34,132 in 2020. The UK median salary for the sector in 2025 was £39,992 a £3,165 (9%) increase from £36,827 in 2024. The Wales median salary figures for 2025, 2024, 2022 and 2021 cannot be disclosed due to either low sample size or high variance and is therefore disclosive or is deemed unreliable for publication.

There were 145 business units in the sector in 2025, a decrease from 155 in 2024. 81% of the business units in the sector were classified as micro in 2025, the same as in 2024.

Retail spend on drinks in Wales totalled £1.4bn in 2025, an increase of £16.2m (1%) from £1.4bn in 2024. In comparison, the GB total increased by £713.6m (3%) from £24.1bn in 2024 to £24.8bn in 2025.

Sales of beers, wines and spirits (BWS) accounted for around three-fifths (61%) of the Welsh retail spend on drinks, with wine having the largest share at 23%. Still water had the largest percentage increase in the sector from £33.0m in 2024 to £40.7m in 2025, a £7.7m (23%) increase.



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The ðrinks sector in Wales hað a turnover of £1.5bn in 2025, an increase of £405.2m (36%) from £1.1bn in 2024.

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Other Food Products

The other food products sector includes businesses involved in the following manufacturing activities: sugar, cocoa, chocolate, confectionery, tea, coffee and coffee substitute manufacturing, condiments and seasonings, prepared meals and dishes, and homogenised food preparation and dietetic food[3].

The other food products sector in Wales had a turnover of £1.5bn in 2025, an increase of £137.6m (10%) from £1.3bn in 2024. Compared to 2019, the sector has increased by £765.0m (110%) from £697.1m.

The sector employed 7,000 individuals in 2024, the same as in 2023. Almost all of the employees in the sector worked full-time equivalent (FTE) in 2024. The median salary for the sector in 2025 was £33,916, an increase of £7,411 (28%) from £26,505 in 2023. The UK median wage for the sector increased by £3,115 (11%) from £27,629 in 2023 to £30,744 in 2025. The Wales median salary figures for 2024 cannot be disclosed due to either low sample size or high variance and is therefore disclosive or is deemed unreliable for publication.

There were 125 business units in the sector in 2025, the same as in 2024. 69% of the businesses were classified as micro, the same as in 2024.

Welsh retail spend on sugar and chocolate confectionery increased by £9.3m (3%) from £317.5m in 2024 to £326.8m in 2025. Spending on tea and coffee increased by £8.0m (7%) from £117.9m to £125.9m. Spending on table sauces, condiments and pickles increased by £2.1m (3%) from £60.2m to £62.3m. Across GB, retail spend on sugar and chocolate confectionery increased by £388.1m (7%) from £5.4bn to £5.8bn. Spending on tea and coffee increased by £120.7m (6%) from £2.2bn to £2.3bn and table sauces, condiments and pickles increased by £30.6m (3%) from £1.2bn to £1.2bn.

Retail spend on ambient, chilled and frozen ready meals decreased in Wales by £4.7m (3%) from £181.9m in 2024 to £177.3m in 2025. Across GB the same categories increased by £194.2m (6%) from £3.2bn to £3.4bn.



> The other food products sector in Wales had a turnover of £1.5bn in 2025, an increase of £137.6m (10%) from £1.3bn in 2024.

3 Examples of homogenised food preparation and dietetic food include baby formula, follow-on milk, gluten free foods, low sodium foods and diabetic foods.

Dairy

The Welsh dairy sector had a turnover of £727.8m in 2025, an increase of £2.5m (<1%) from £725.4m. Compared to 2019, the sector has increased by £116.6m (19%) from £611.2m.

In 2024 the sector employed 1,750 individuals, the same as in 2023. Almost all of the employees in the sector worked full-time equivalent (FTE), an increase from 86% in 2023. The median salary for the sector in Wales was £34,180 in 2024, an increase of £8,111 (31%) from £26,068 in 2023. The UK median salary for the sector in 2024 was £35,307 a £3,553 (11%) increase from £31,754 in 2023. The UK median salary for the sector in 2025 was £38,117 a £2,809 (8%) increase from £35,307 in 2024. The Wales median salary figures for 2025 cannot be disclosed due to either low sample size or high variance and is therefore disclosive or is deemed unreliable for publication.

In 2025 there were 70 business units in the sector, an increase from 65 in 2024. 61% of these 70 business units were classified as micro, this is 1 percentage point lower than in 2024. 25% of the 70 business units were classified as small, an increase of 1 percentage point from 2024.

Up to the 31st of December 2025, there were 107 establishments approved for processing eggs or egg products, a decrease from 109 the previous year. There were also 101 establishments approved for processing raw milk and dairy products, decreasing from 109 in 2024.

Numbers for dairy cattle (female 2+ with offspring) increased by 2,799 (1%) from 251,313 in 2024 to 254,112 in 2025. The number of chickens used for egg production was 4.5m in 2025, an increase of 142,075 (3%) from 4.4m in 2024.

Retail spend on dairy products in 2025 was £808.6m, an increase of £38.3m (5%) from £770.3m in 2024. GB retail spend for dairy products increased by £1.1bn (8%) from £14.5bn in 2024 to £15.7bn in 2025. Milk continued to have the highest share of dairy spend in 2025 at 29%, a 1 percentage point decrease from 2024 whilst baby milk had the strongest growth of 47% from £6.8m in 2024 to £10.0m in 2025.



> The Welsh ðairy sector hað 70 business units in the sector in 2025, an increase from 65 in 2024.

Bakery

The bakery sector in Wales had a turnover of £586.5m in 2025, an increase of £90.4m (18%) from £496.1m in 2024. Over the longer term, the sectors turnover has increased by £26.4m (5%) from £560.1m in 2019.

The sector employed 6,000 individuals in 2024, the same as in 2023. 83% of those employed within the sector worked full-time equivalent (FTE), the same as in 2023.

In 2025 there were 180 business units in the sector, an increase from 175 in 2024. 68% of the business units were classified as micro, a decrease from 70% in 2024.

In 2025 the median salary for the sector in Wales was £23,585, a decrease of £1,263 (5%) from £24,848 in 2024. The UK median salary increased, by £226 (1%) from £29,076 in 2024 to £29,302 in 2025.

Retail spend in the Welsh bakery sector was £689.1m in 2025, a decrease of £3.7m (1%) from £692.7m in 2024. The retail spend across GB increased by £522.7m (4%) from £13.1bn in 2024 to £13.6bn in 2025. Ambient cake continued to have the highest share of the bakery retail spend in Wales at 14% in 2025 the same as in 2024. Fresh baked desserts had the largest percentage growth in the sector with retail spend increasing by £0.2m (21%) from £1.1m in 2024 to £1.4m in 2025.



> In 2025 the turnover for the bakery sector was £586.5m, an increase of £90.4m (18%) from £496.1m in 2024.

Retail and Wholesale

The retail industry had a turnover of £10.6bn in 2025, an increase of £496.5m (5%) from £10.1bn in 2024.

The retail sector employed 62,000 individuals in 2024, a 7% increase from 58,000 in 2023. 25% of those employed in the sector worked full-time equivalent (FTE), this is a 2% decrease from 2023. In GB, the percentage of FTE employees in the sector was 33% in 2024, an increase from 32% in 2023. The median salary for the sector in Wales in 2025 was £17,460, an increase of £943 (6%) from £16,517 in 2024. The median salary for the sector across the UK increased by £1,454 (8%) from £17,320 in 2024 to £18,774 in 2025.

In 2025 there were 4,070 business units in the sector, a decrease of 20 from 4,090 in 2024. 69% of the units in the sector were classified as micro in 2025, a decrease from 70% in 2024.

Total retail spend on groceries was £7.6bn in 2025, increasing by £103.8m (1%), from £7.5bn in 2024. The total retail spend across GB increased by £6.3bn (4%), from £141.6bn in 2024 to £147.9bn in 2025.

Tesco accounted for 28% of the total spend share in Wales during 2025, the largest of any supermarket, increasing it's share by <1 percentage point from 2024. Tesco is followed by Asda (11%), Aldi (10%), Lidl (8%) and then Morrisons (7%). The order of spend share by supermarket in 2024 was Tesco (28%), Asda (11%), Aldi (10%), Morrisons (7%), Sainsburys (7%).

The wholesale sector had a turnover of £3.2bn in 2025, an increase of £327.8m (12%) from £2.8bn in 2024.

The wholesale sector employed 8,000 individuals in 2024, a 33% increase from 6,000 in 2023. 75% of the employees in the sector worked full-time equivalent (FTE), the same as in 2023. The median salary in Wales in 2025 was £30,797, a decrease of £1,789 (5%) from £32,586 in 2024. Across the UK, median wages for the sector increased by £1,058 (3%) from £31,693 in 2024 to £32,751 in 2025.



“The wholesale sector employed 8,000 individuals in 2024, a 33% increase from 6,000 in 2023.”

Catering

The catering sector incorporates all non-residential catering including restaurants and cafes, foodservice, mobile caterers, take away, and events catering.

The sector had a turnover of £3.6bn in 2025, an increase of £332.9m (10%) from £3.3bn in 2024.

The sector employed 83,000 individuals in 2024, an 8% decrease from 90,000 in 2023. 35% of the employees in the sector worked full-time equivalent (FTE), an increase from 34% in 2023. The median salary for the sector in Wales was £14,540 in 2025, an increase of £3,036 (26%) from £11,504 in 2024. Median salaries across the UK increased by £573 (4%), from £15,160 in 2024 to £15,733 in 2025.

In 2025 there were 8,970 business units in the sector, an increase of 25 (<1%) from 8,945 in 2024. 74% of the business units in the sector were classified as micro in 2025, the same as in 2024.

According to the Living Costs and Food Survey, people in Wales spent on average £27.00 per week on catering services (restaurants, café meals, alcoholic drinks away from home and take-away) between the year ending 2022 and the year ending 2024. This is the second lowest amount of the four UK nations, average spendings for each nation were the following, Scotland was £22.90, England was £28.60 and Northern Ireland was £34.00 across the same time period.



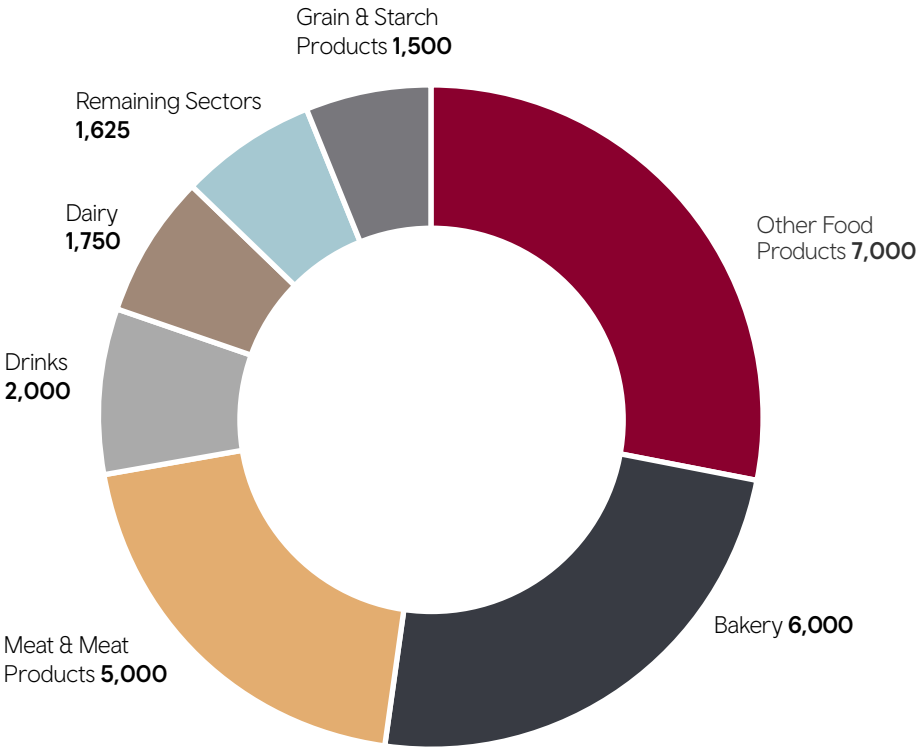
> The median salary for the catering sector in Wales was £14,540 in 2025, an increase of £3,036 (26%) from £11,504 in 2024.

Appendix A: Welsh Food and Drink industries – Additional statistics

Welsh food and drink turnover and business units relative to the UK

Metric	Wales	UK	Wales as % of UK
Food foundation sector			
Turnover 2025	£11.1bn	£308.5bn	**4%**
Business Units 2025	1,520	38,235	**4%**
Food and drink supply chain			
Turnover 2025	£28.7bn	£709.4bn	**4%**
Business Units 2025	28,020	468,155	**6%**
Food and drink manufacturing sector			
Turnover 2025	£6.8bn	£143.3bn	**5%**
Business Units 2025	650	13,980	**5%**

Employment by food and drink manufacturing sub-sector in Wales, 2024



Source: Welsh Government analysis of the Business Register and Employment Survey (BRES). The 'Remaining Sectors' category includes Prepared Animal Feed, Fruit and Veg, and Fish and Crustaceans.

Food foundation sector: turnover growth 2019-2025

Year	Wales			UK		
	Turnover	Turnover Growth	Turnover Growth %	Turnover	Turnover Growth	Turnover Growth %
2019	£8.2bn	£0.6bn	9%	£228.6bn	£4.9bn	2%
2020	£7.9bn	£-0.3bn	-3%	£232.7bn	£4.1bn	2%
2021	£8.5bn	£0.6bn	7%	£233.6bn	£0.9bn	0%
2022	£8.1bn	£-0.4bn	-5%	£230.4bn	£-3.2bn	-1%
2023	£9.3bn	£1.2bn	15%	£245.0bn	£14.6bn	6%
2024	£10.2bn	£0.9bn	10%	£287.6bn	£42.6bn	17%
2025	£11.1bn	£0.8bn	8%	£308.5bn	£20.9bn	7%

Food and drink supply chain: turnover growth 2019-2025

Year	Wales			UK		
	Turnover	Turnover Growth	Turnover Growth %	Turnover	Turnover Growth	Turnover Growth %
2019	£22.1bn	£0.8bn	4%	£548.9bn	£10.6bn	2%
2020	£22.4bn	£0.3bn	1%	£562.8bn	£13.9bn	3%
2021	£23.0bn	£0.6bn	3%	£569.8bn	£7.1bn	1%
2022	£22.3bn	£-0.7bn	-3%	£553.6bn	£-16.3bn	-3%
2023	£24.6bn	£2.3bn	10%	£588.0bn	£34.4bn	6%
2024	£27.0bn	£2.4bn	10%	£667.3bn	£79.4bn	13%
2025	£28.7bn	£1.7bn	6%	£709.4bn	£42.1bn	6%

Food and drink manufacturing: turnover growth 2019-2025

Year	Wales			UK		
	Turnover	Turnover Growth	Turnover Growth %	Turnover	Turnover Growth	Turnover Growth %
2019	£5.2bn	£0.4bn	8%	£104.5bn	£4.7bn	5%
2020	£4.9bn	£-0.4bn	-7%	£102.7bn	£-1.7bn	-2%
2021	£5.3bn	£0.5bn	10%	£104.2bn	£1.4bn	1%
2022	£5.1bn	£-0.2bn	-4%	£107.3bn	£3.1bn	3%
2023	£6.0bn	£0.9bn	17%	£112.9bn	£5.6bn	5%
2024	£6.3bn	£0.3bn	5%	£131.3bn	£18.4bn	16%
2025	£6.8bn	£0.5bn	8%	£143.3bn	£11.9bn	9%

Food foundation sector industry breakdown – businesses headquartered in Wales

Year		Turnover Size Band	Entity Count	Employee Count	Turnover (£m)
2024		**Total**	**1,275**	**22,200**	**5,698**
	a.	<£1m	935	2,900	212
	b.	£1m – £2m	105	700	140
	c.	£2m – £3m	45	500	102
	d.	£3m – £4m	30	600	97
	e.	£4m – £5m	15	400	75
	f.	£5m – £10m	55	1,700	367
	g.	>£10m	100	15,400	4,706
2025		**Total**	**1,260**	**22,600**	**6,163**
	a.	<£1m	875	2,400	213
	b.	£1m – £2m	130	900	186
	c.	£2m – £3m	60	600	134
	d.	£3m – £4m	20	400	68
	e.	£4m – £5m	20	400	93
	f.	£5m – £10m	60	2,100	430
	g.	>£10m	90	15,900	5,039

Source: Welsh Government analysis of the Inter-Departmental Business Register (IDBR).

Appendix B: Methodological notes

The data in this appraisal were compiled between December 2025 and July 2026. The statistics presented in this appraisal were the most up-to-date available at the time of writing.

Sources

Data	Data Source	Latest year available for Report
Employment	Welsh Government analysis of the Business Register and Employment Survey (BRES)	2024
Business Statistics (local units, entity counts, turnover)	Welsh Government analysis of the Inter-Departmental Business Register (IDBR)	2025
Protected Geographical food and drink names	Protected geographical food and drink names – GOV.UK (www.gov.uk)	2026
Earnings	Welsh Government analysis of the Annual Survey of Hours and Earnings (ASHE)	2025
Food Standards Agency Approved Businesses	Approved Food Establishments: www.data.food.gov.uk/catalog/datasets/1e61736a-2a1a-4c6a-b8b1-e45912ebc8e3	2025
Taste of Wales Awards	www.greattasteawards.co.uk/	2025
Retail Expenditure	Copyright © 2026 Nielsen Consumer LLC. All Rights Reserved Note: Prior to this year's publication, a different data source was used; therefore, figures are not directly comparable with previous years	2025
Export Values	Welsh Government analysis of Regional Trade in Goods	2025
Export Values for Welsh lamb and beef	Estimations from Hybu Cig Cymru (HCC)	2025
Average expenditure on catering services	Living Costs and Food survey	2022-2024

If you have any questions please contact:
FoodDivisionalBusiness@gov.wales or economic.stats@gov.wales

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