



clearBorder

The State of the Border

Business Experience
of the UK Border 2024



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Executive Summary



Executive Summary

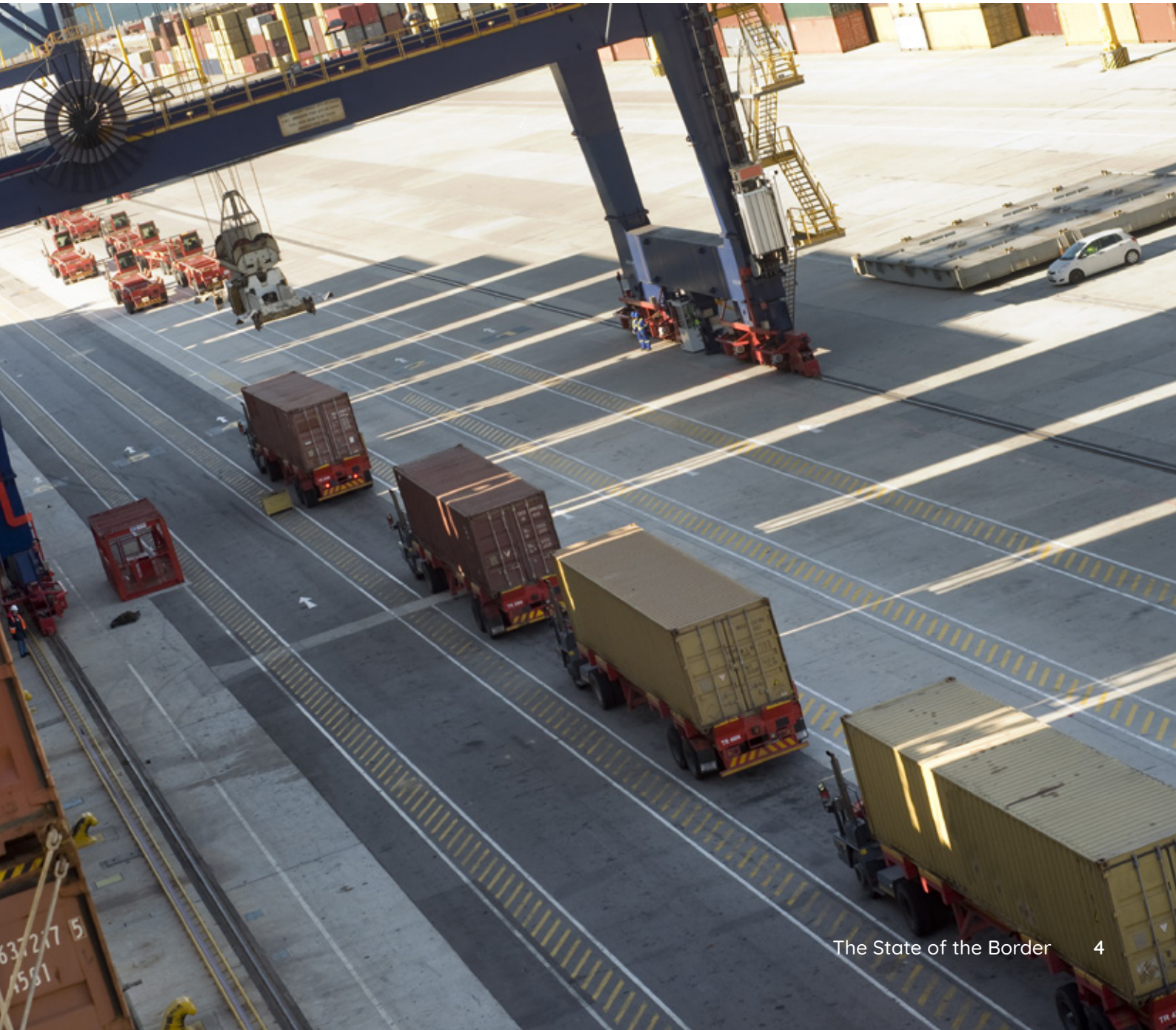
Introduction

This report explores the experiences of 900 businesses across the UK, France and Germany during 2024. It reveals both the issues experienced with cross-border trade and the response of business decision-makers to the challenges they face.

In the results we see a consistent story of poor border performance but also of ongoing business adaptation. We reveal notable differences between countries and the impact of world conditions on decision-makers' expectations.

900

We surveyed 900 businesses across the UK, France and Germany, assessed the most recent trade statistics and interviewed 9 decision makers in depth.





Key findings

- **Border experience is worsening:** Over half of all businesses in all countries experienced increased fees and delays at the border, on both imports and exports. More than half of French and German businesses experienced delays at their own border. The proportion of UK businesses experiencing delays rose from 54% in 2023 to 64% in 2024, reversing an improving trend since 2021.
- **Export controls add to difficulties:** Businesses dealing with export controls experienced more delays and increased costs, leading them to invest in more mitigating actions. German and UK businesses experienced more substantial cost increases than French.
- **Veterinary controls are a challenge for EU businesses:** About 1 in 4 French and German businesses struggle with health certificates and finding vets, about twice the figure for UK businesses. This has implications for UK demands in negotiations with the EU.
- **Businesses are adapting:** Most businesses have made at least one change to their operations in the past year. A higher proportion of German businesses report changes compared to French businesses. UK businesses reported the least year-on-year change.
- **Delivery times are lengthening:** Border issues are the most common reason for extending delivery times in all countries. UK and German businesses report increased border-related delivery delays. Net, French businesses report shorter delivery times relative to last year.
- **Confidence holds:** Businesses remain generally confident in their ability to adapt to border difficulties. German businesses are most optimistic despite reporting the most challenges. UK businesses are less confident than they were in 2023. French businesses are the most pessimistic, especially regarding trade with the UK.
- **Tariffs, costs and instability loom:** German businesses are most optimistic for trade but worry about cost pressures and tariffs. French businesses are most pessimistic and focused on domestic instability. All three countries anticipate improvements in EU/UK trade and, to some extent, US trade.

“We will be able to grow the business... The doubt about it is whether it happens through the UK, or another country.”

Herb and spice supplier

An aerial, top-down view of a large port facility. The image is dominated by rows of colorful shipping containers in shades of red, blue, yellow, and white. Several large gantry cranes with blue and yellow structures are positioned over the container stacks. A paved area with yellow markings and a few small vehicles, including a yellow truck and a red truck, is visible in the lower half of the frame. The water of the harbor is visible on the right side.

The State of the Border 2024

The State of the Border 2024

The UK border

The UK border remains an impediment to growth. As the world plunges into protectionism, international trade faces more challenges than at any time in living memory. For countries like the UK, France and Germany (read the EU) seeking growth for their sluggish economies, the ability of their borders to do two things – protect the functions of the state and facilitate the flow of commerce – is critical. On the evidence available here, those borders are failing. And they are getting worse.

Our survey data shows a consistent pattern of cost and delay created by under-resourcing, outdated technology and poor processes. This applies to UK businesses' experience of the UK border. It also applies to German and French businesses' experience of the UK and – to some extent – of their own borders.

clearBorder helps businesses of all sizes and sectors trade internationally. In our experience, this pattern of delay and cost is not the flip side of a more secure border. Non-compliance is rife. Perhaps a third to a half of customs declarations are incorrect. Very few are checked or corrected. This means the government does not know what is arriving on its territory or what VAT and duties are owed.

Border processes are failing

Businesses struggle to follow customs requirements because they are arcane and inadequate for a world of digital information and e-commerce. Most non-compliance is accidental but a great deal is opportunistic. All of it represents risk – and therefore cost – for businesses and missed opportunities for government.

More than half of French, UK and German businesses experienced an increase in delay and cost in 2024. Over half have made changes in response. The most significant of these was to extend delivery times. 62% of all businesses cited difficulties with goods entering or leaving their country as the reason for changes to deliveries.





Businesses are adapting

Besides longer delivery times, businesses are adapting in other ways and report considerable confidence in their ability to handle the border. In all three countries, they display similar levels of confidence in their own ability to manage imports and exports (36%-42%) and their supply chains (39%-40%). They are less confident in the import and export process to/from the EU (20%-26%). UK businesses are more confident in importing and exporting from non-EU (30%) markets than the EU (20%).

Our findings suggest UK businesses have moved further in adapting to the post-Brexit trading environment than their French and German counterparts, perhaps reflecting that their needs have been more acute. But none of our evidence suggests notable improvement in the management of the UK border as a service to business, which might have been expected from a government with full control over its trade regime.

Fishing for success: sardines or swordfish?

Our findings do suggest opportunities for improvement, though there are pitfalls too.



Sardines: a “veterinary agreement”

A key UK demand in UK/EU ‘reset’ discussions relates to controls on food, plant and animal products, commonly referred to as a veterinary agreement. But who gains and what is the price?

We have clear evidence that simplified SPS¹ controls would benefit EU businesses at least as much as UK ones. This is because the UK imports more of these products than it exports and because EU (French and German) businesses find requirements more difficult than their UK counterparts: they are almost twice as likely to find completing health certificates and organising an official veterinarian a challenge.

Before the UK concedes ground to achieve a veterinary agreement, it should be clear who will gain most from new arrangements. Since leaving the EU, the UK has operated a more flexible and scientifically sound approach to bio-security than the EU. The UK now permits gene-editing to improve the productivity of crops and uses a simplified SPS process to benefit imports from elsewhere in the world.

Aligning with EU regulations would remove that flexibility and the potential for further adaptation. EU businesses would benefit more than their UK counterparts at the price of restricting potential productivity-enhancing innovations.

“...SPS to Europe [is] a problem for us because we are doing 10 or more trucks to Europe every week – it’s taking 5-10 days.”

Herb and spice supplier

¹ Sanitary and Phytosanitary (SPS) controls applied to food, plant and animal products.

Swordfish: automation and facilitation

Much greater opportunity lies in automating and streamlining processes across the border.

Businesses on both sides of the Channel report consistent causes of delays at the border. While UK experience of delays has improved, these are still noticeably longer than those experienced by French or German businesses. Broadly, more than 40% report time taken for checks, paperwork and capacity at the border as reasons for delay in both directions (French businesses report slightly lower percentages in some cases).

Automation and trade facilitation offer solutions that can be pursued independently of negotiations – or, indeed, further enhanced by cooperation.

Automation refers to the digital exchange of information between traders and government similar to what we routinely see with VAT returns or Open Banking reforms in the UK. Under current systems customs data is submitted to the government only as the goods approach the border. This may be electronic but it is not truly automatic.

The first and second advantages would address the problems reported by traders and improve governments' surveillance.

“One improvement would be a simplified digital system for small businesses like ours... to clear goods, rather than relying on transport companies to file paperwork on our behalf.”

Electronic component supplier

Automation would have three big advantages

one

First, greater automation within government systems would vastly increase the capacity of border authorities to interrogate data.

two

Second, automatic receipt of customs data would greatly simplify the process for businesses of assembling and submitting customs information.

three

Third, it would allow for early submission and correction of errors – something that can only currently happen at the border, addressing the complaints of businesses about the time taken for checks.

Trade facilitation refers to simplifications for traders who meet certain standards of trust. This could be as simple as reducing the information required for each declaration or allowing declarations in bulk – at the end of the month like a VAT return, for example.

Such schemes already exist but they are poorly structured and expensive for little real gain – in the UK at least.

Real benefits would come by considering both: greater automation and redesigned processes to support trade facilitation. And this would be further transformed by communication between UK and EU customs systems themselves – all of which is technically possible, without compromising independence, if political agreement allowed it.

Conclusion

Borders have become more important to businesses every year since we started this research in 2021.

2021

In 2021 the UK left the EU. This produced the largest single change in a trade relationship in history.

2022

In 2022, Russia invaded Ukraine. International supply chains, already strained by deteriorating relations with China, suddenly looked hopelessly fragile.

2023

In 2023, war erupted in the Middle East: the Suez Canal closed due to attacks.

2024

In 2024, President Trump won a second term, committing to import tariffs and extensive export controls.

2025

2025 looks no less tumultuous. Never has the need for businesses to understand and plan their cross-border operations been greater. Never has the requirement to modernise borders been more pressing as governments scramble for growth in their economies.



Business Experience



Business Experience

Delay and cost are the themes of our respondents' experience of UK/EU cross-border trade. Border issues identified in our previous reports persist and are getting worse.

We can see continuity in the experience of UK respondents. The majority of businesses cited increased fees or delays across imports and exports. Based on UK businesses' responses, both got worse in 2024.

French and German businesses reported a similar experience. We cannot compare these findings with previous years but the similarity of their responses to those of UK businesses suggest common experience. A notable majority report increased fees, delays at the UK border and delays at their own borders.

Within this overall picture we can identify a number of more detailed trends.

Controls on dual-use and military technologies (referred to in the report under the collective heading of 'export controls') are a clear factor in exacerbating border issues. They are associated with greater difficulties and with a greater degree of adjustment on the part of businesses that experience them.

Border bio-security measures to protect sanitary and phytosanitary health (SPS controls) are another notable feature of UK/French/German business experience. This reflects the unusually high level of SPS trade between the UK and EU. French and German businesses find this more of a challenge than UK businesses. This may be because full UK SPS controls only started in 2024 and are still new. It may reflect wider problems with French/German authorities' ability to support their exporting businesses.²

² After Brexit, the UK initially suspended SPS controls on EU imports to protect trade flows. A new UK regime for SPS controls began in 2024 under the 'Border Target Operating Model (BTOM)'



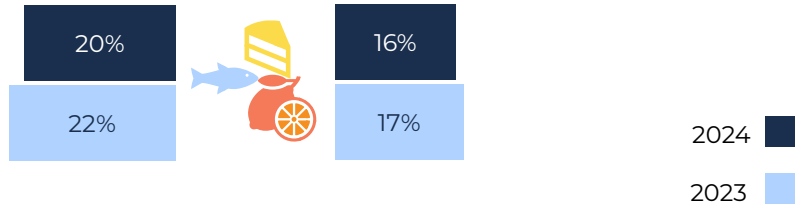
Import and export experience

UK experience: 2024 vs 2023

% of UK importers who have experienced each problem

% of UK exporters who have experienced each problem

Perishable goods held up at the border



Goods being rejected or impounded at the border



Changing your usual port of entry/exit



Unfulfilled orders



Delays at the UK border



Increased fees



Question: Since the start of [2023/2024], have you experienced any of the following on your imports?

Question: Since the start of [2023/2024], have you experienced any of the following on your exports?

IMPORTERS

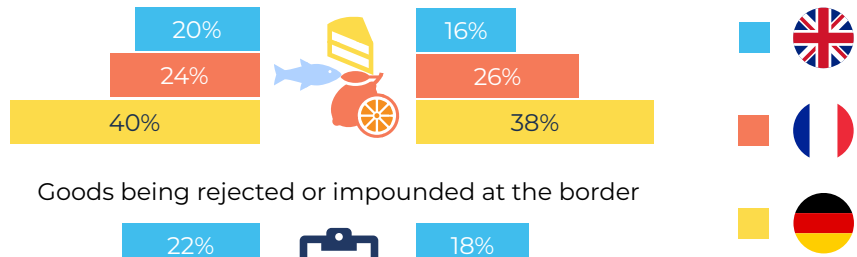
EXPORTERS

UK/French/German experience 2024

% of UK importers and FR/DE businesses who import from the UK who have experienced each problem

% of UK/FR/DE exporters who have experienced each problem

Perishable goods held up at the border



Goods being rejected or impounded at the border



Changing your usual port of entry/exit



Unfulfilled orders



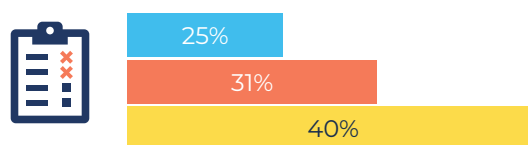
Delays at the UK border



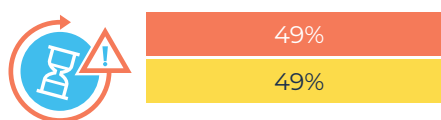
Increased fees



Export control license issues*



Delays at the French/German border*



Question: Since the start of 2024, have you experienced any of the following on your imports/exports?

* Not asked of Importers'

IMPORTERS

EXPORTERS

Border challenges

UK, French and German businesses have a consistent view of the challenges facing their cross border trade.

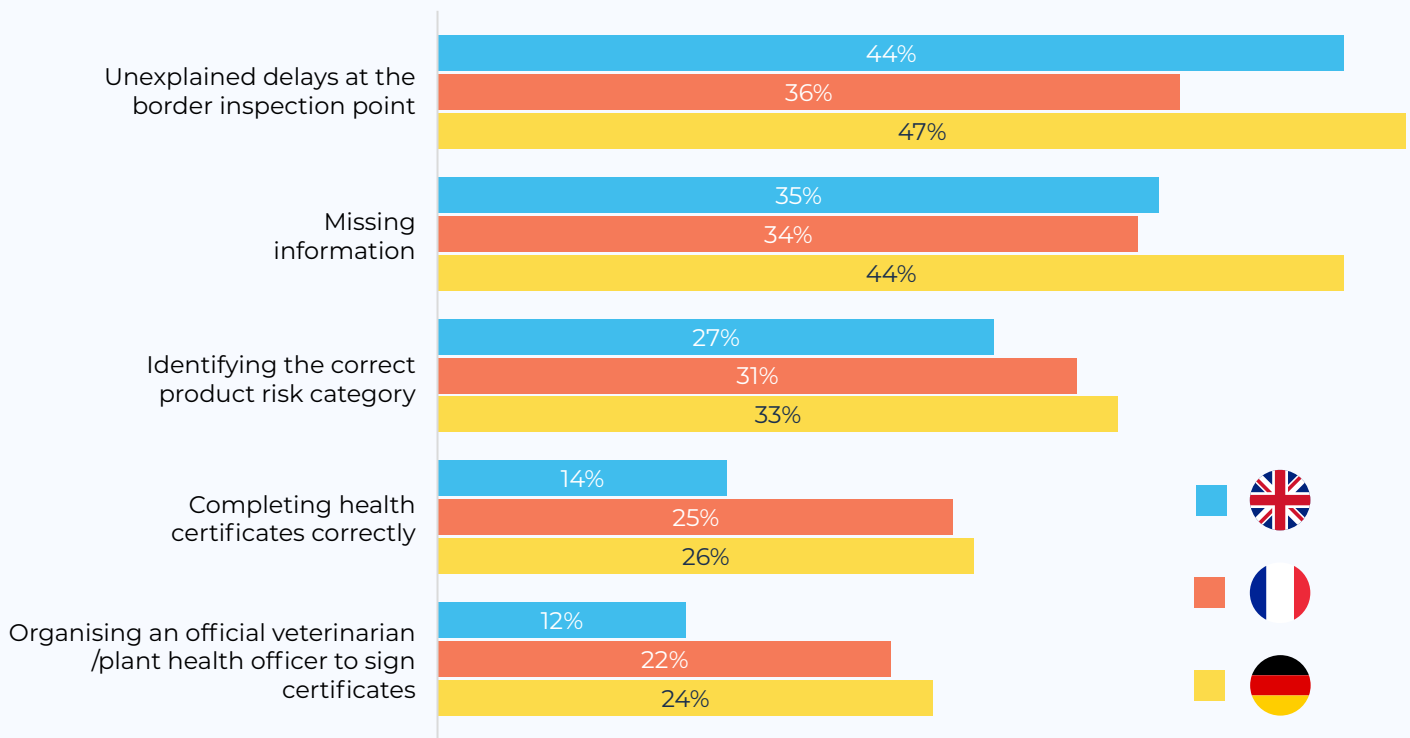
French and German businesses report significantly more concern about SPS requirements than do their UK counterparts. Finding official veterinarians and completing export health certificates³ are a worry for a quarter of those businesses.

UK businesses are notably less troubled by these requirements for exports to the EU. This might reflect the fact that the UK only imposed these controls fully in 2024, meaning French and German businesses are still new to the requirement. The EU, by contrast, introduced controls on UK products immediately on the UK's departure. UK businesses have therefore had four years to adjust to the requirements.

In all markets, businesses that experienced export control issues were more likely to face these challenges.

Challenges faced at the UK border

% of all respondents selecting all challenges that apply



Question: Above are a number of challenges businesses may have faced at the UK border. Which, if any, have you faced during 2024? Please select all that apply.

³ EHCs are required for moving food, plant and animal products internationally. They must be signed by a state-authorized 'Official Veterinarian' (OV). Exporting companies are responsible for the EHCs and finding the OVs to sign them.

Delays

Checks are the most commonly cited reason for delay across French, German and UK businesses. All reported the border's inability to "handle high volumes" as the other top reason for delays. German and UK businesses reported a significantly worse experience than French businesses, which were notably more forgiving in their assessment of the reasons for delays.

UK businesses report experiencing delays more often than in 2024, though the mean length of delay on imports was lower (3.42 days, compared to 8.77 days in 2023).

On both inbound and outbound flows, UK businesses report longer average delays (over 3 days) than their French and German counterparts (less than 3 days).

Export controls caused significant issues for businesses that experience them. UK and German businesses were particularly affected, being around one and a half times more likely to report an increase in delays during 2024.

Inbound delays

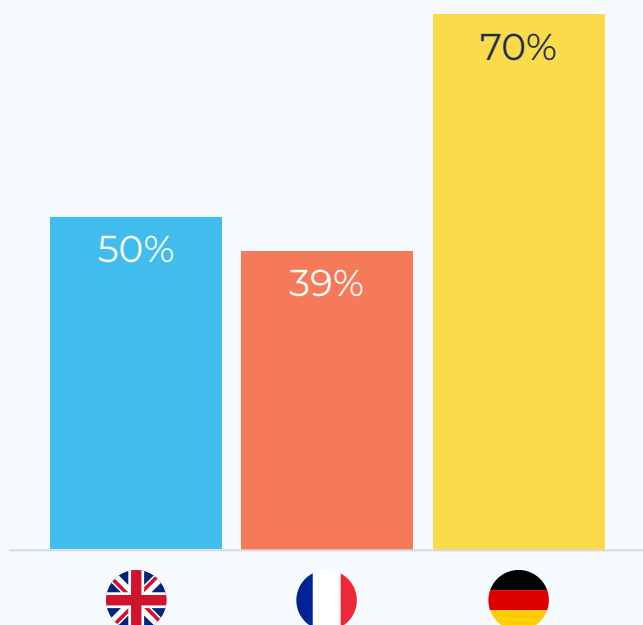
- Most UK and German businesses reported experiencing delays more often in 2024 compared to 2023
- UK businesses experienced longer delays than their French and German counterparts, though shorter than in 2023

“One thing was stuck for a month and a half, with questions flying around.”

Space / Communications Company

Frequency of delays

Net % experiencing more delays on imports



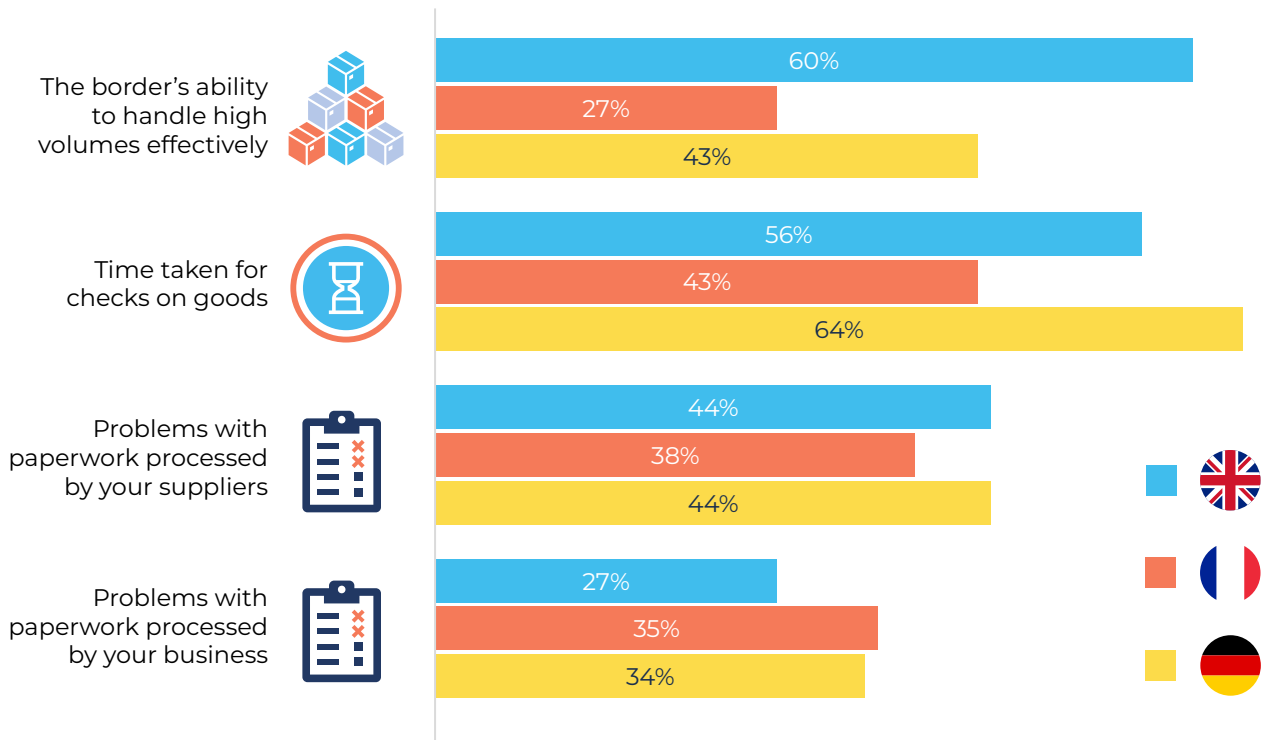
Mean length of delay experienced

% of respondents who experienced delays on their imports selecting each option

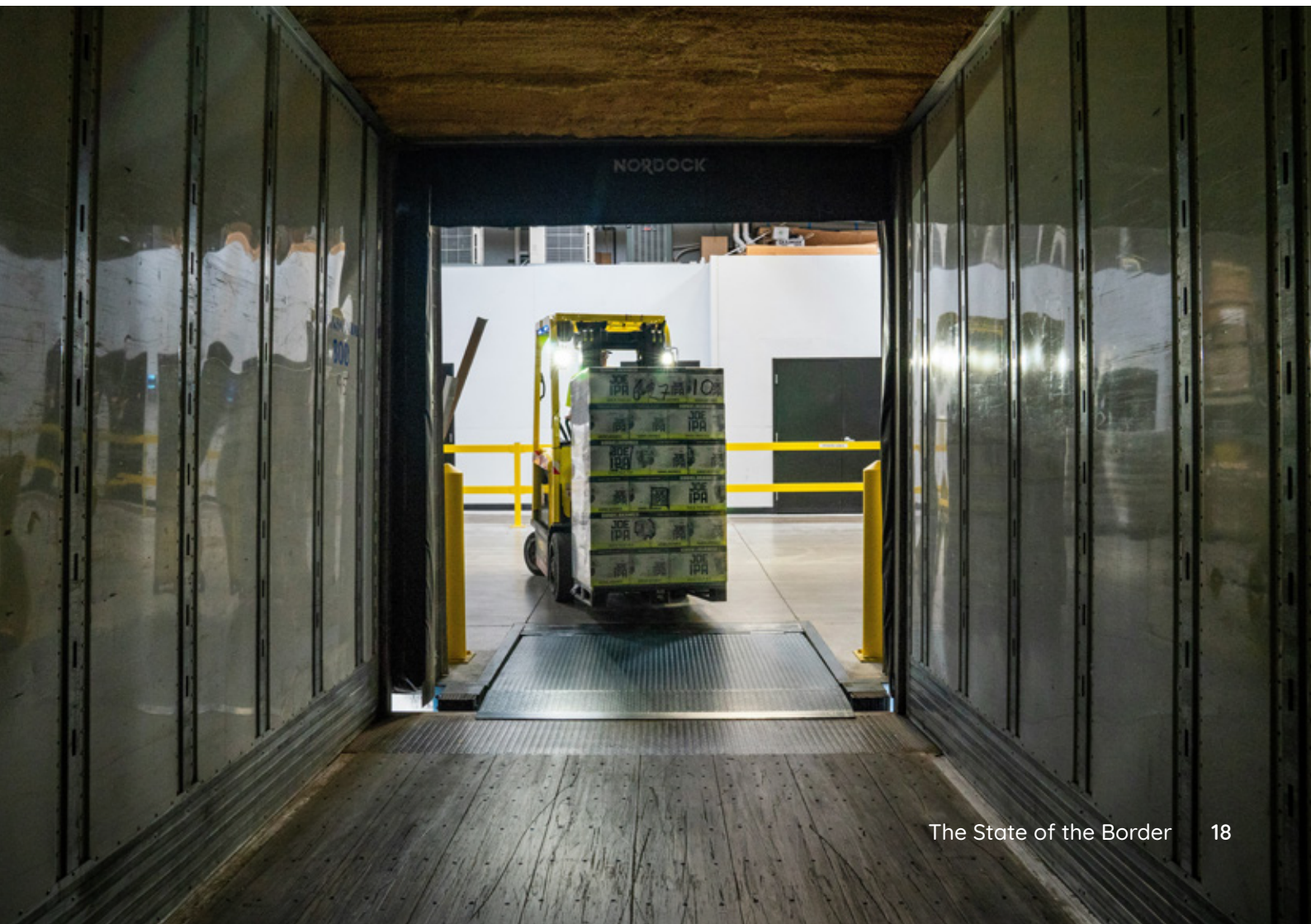


Reasons for delays on imports at the UK border

% of UK/French/German respondents who experience delays on imports at the UK border



Question: You said that you have experienced delays on imports at the UK border. Which of the following has caused the delays you have experienced?



“The uncertainty has been going on since Brexit ... still causing delays ... trucks can be stuck at the border for hours.”

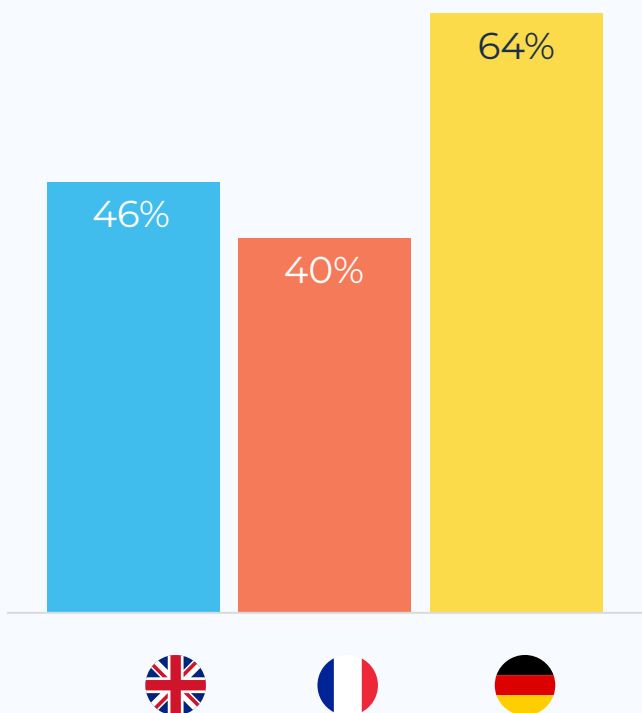
Shipping company

Outbound delays

- UK exporters still experience significantly longer delays than their French and German counterparts (3.55 days vs 2.93 and 2.81 respectively)
- Paperwork, border capacity and time for checks are widely cited as reasons for delays by all

Change in frequency of delays in exports at the UK border

Net % experiencing more delays



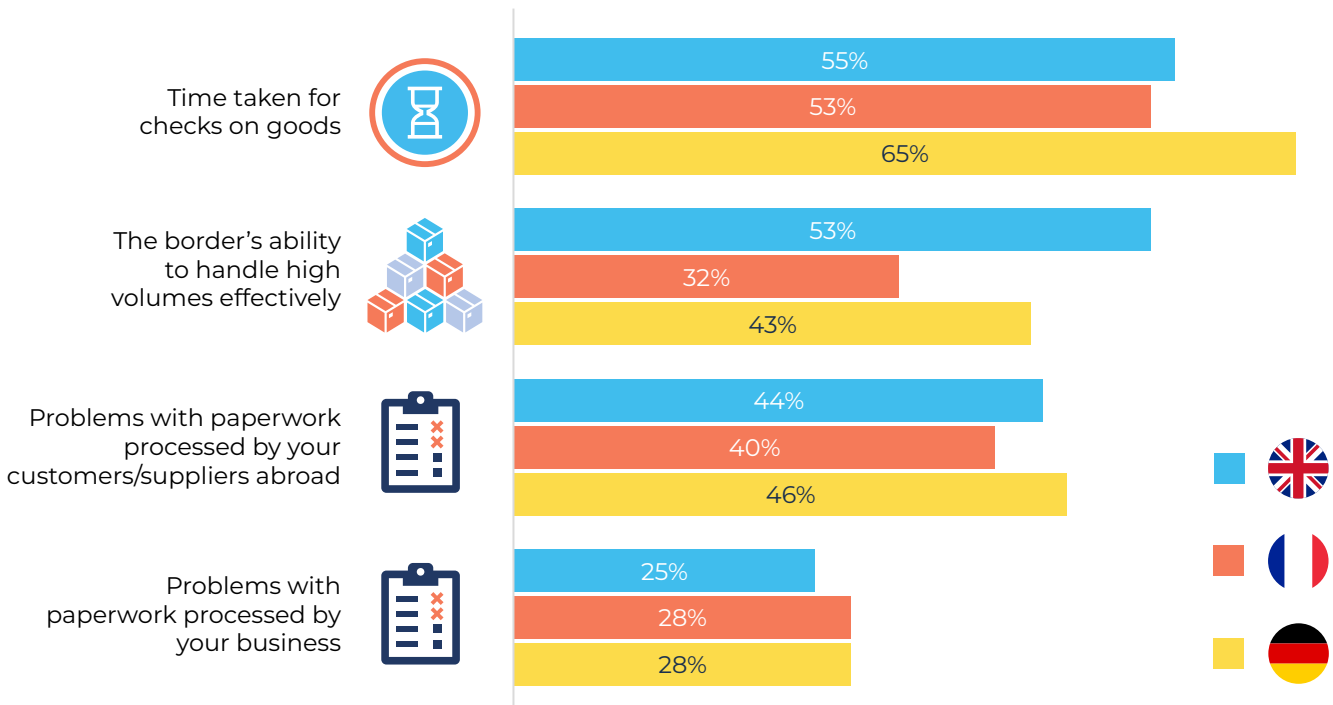
Mean length of delay experienced

% of respondents who experienced delays on their exports selecting each option



Reason for delay on exports at the UK border

% of respondents who experienced delays on their exports selecting each option



Question: You said that you have experienced delays on exports at the UK border. Which of the following has caused the delays you have experienced? Select all that apply





Costs

- At least a third of businesses across all markets blame border and customs issues
- German and UK businesses were notably more likely to report cost increases than were French businesses
- General inflationary pressures were the most commonly cited reason for these increases

Businesses across France, the UK and Germany reported a general increase in fees for imports and exports.

In addition, over 50% cited increases in international freight costs and 40% increases in staff costs to handle international shipments. For the UK, this is consistent with reported cost pressures in 2023.

General inflationary pressure was the most commonly cited reason for cost increases. German businesses reported the greatest experience of cost increases and the highest impact of rising costs of logistics staff.

German and UK businesses were notably more likely to cite instability in global supply chains, perhaps reflecting their exposure to deteriorating relations between East and West - and, indeed, the tremors of tensions within the West.

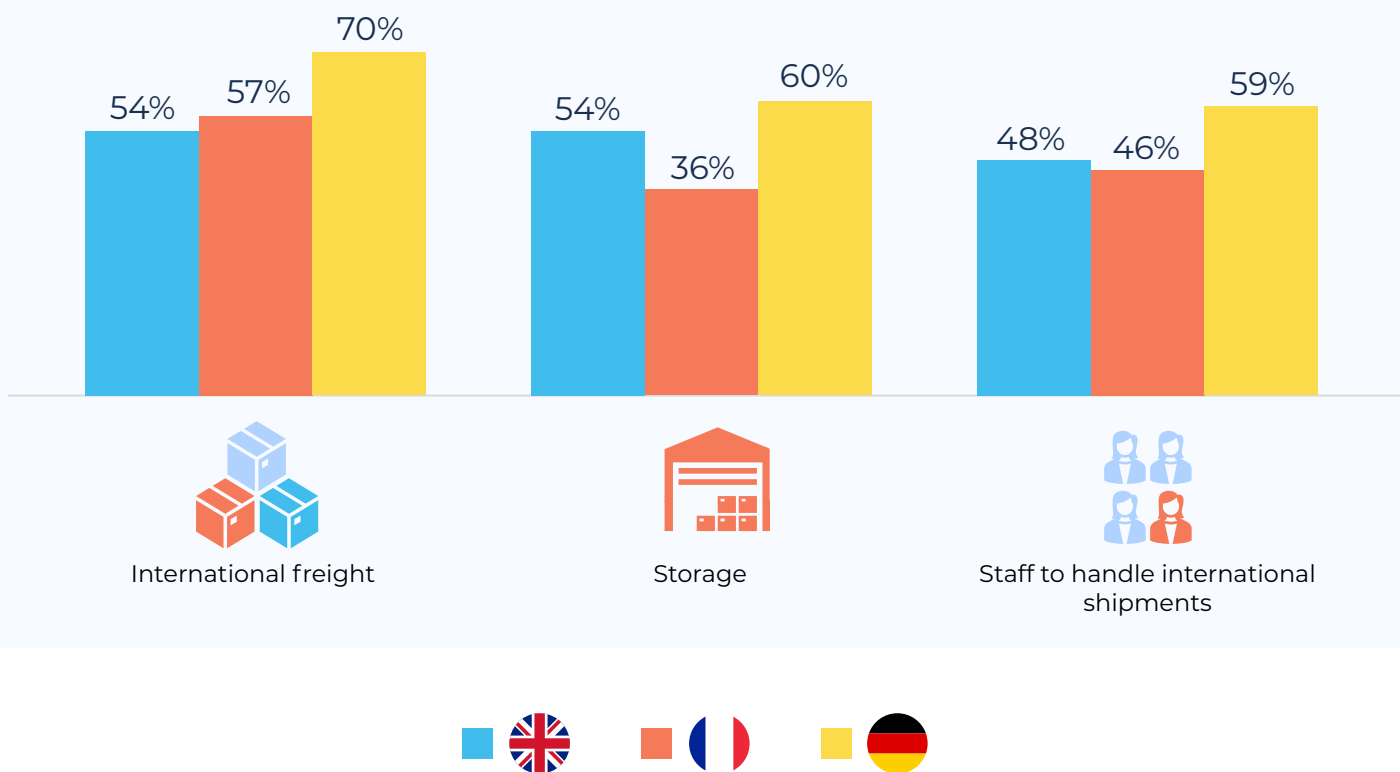
French businesses appear to have been least affected by inflationary costs or instability in global supply chains.

UK businesses that experienced export control issues were much more likely to report increased staffing costs compared to those that did not (70% vs 54%).

Larger UK and German businesses (over £50m) were much more likely to experience cost increases.

Costs of international shipments

Changing costs, Jan 2024-Jan 2025
% of all respondents selecting their costs have increased



Reasons for higher costs of freight

% of UK/French/German respondents who said international freight costs have increased selecting each explanation

64% 43% 60%

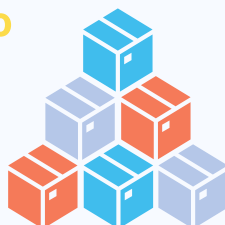
General inflationary pressures which hit all goods and services

49% 29% 43%

Instability in global supply chains

40% 44% 49%

Logistics staff costs



34% 30% 38%

Difficulties at the border or with customs

25% 38% 30%

We are shipping more often

18% 31% 33%

Reduced availability of planes/ships/lorries

Business Response



Business Response

- Most businesses have made at least one change to their border operations
- French and German businesses are more likely have made changes
- UK businesses are notably less likely to have made use of official authorisations

Responses across the UK, France and Germany show extensive evidence of changing business behaviour.

Most companies reported at least one change to their operations. This response was particularly marked among French and German businesses.

French and German businesses were much more likely to make use of official authorisations (like Authorised Economic Operator or processing reliefs) than their UK counterparts.

UK businesses show a lesser response across all categories, particularly on applying for authorisations, employing new staff or purchasing software. This may reflect that UK businesses have been more acutely exposed to customs processes since Brexit and have already made these changes.

French and German businesses, by contrast, have been less impacted overall and may have benefited from the UK's slower adoption of import controls. Nevertheless, this finding also reflects the poor state of UK customs management.

As with costs, export controls appear to be a notable exacerbating factor. Businesses dealing with export controls experience more issues and are more likely to have taken mitigating actions in response.

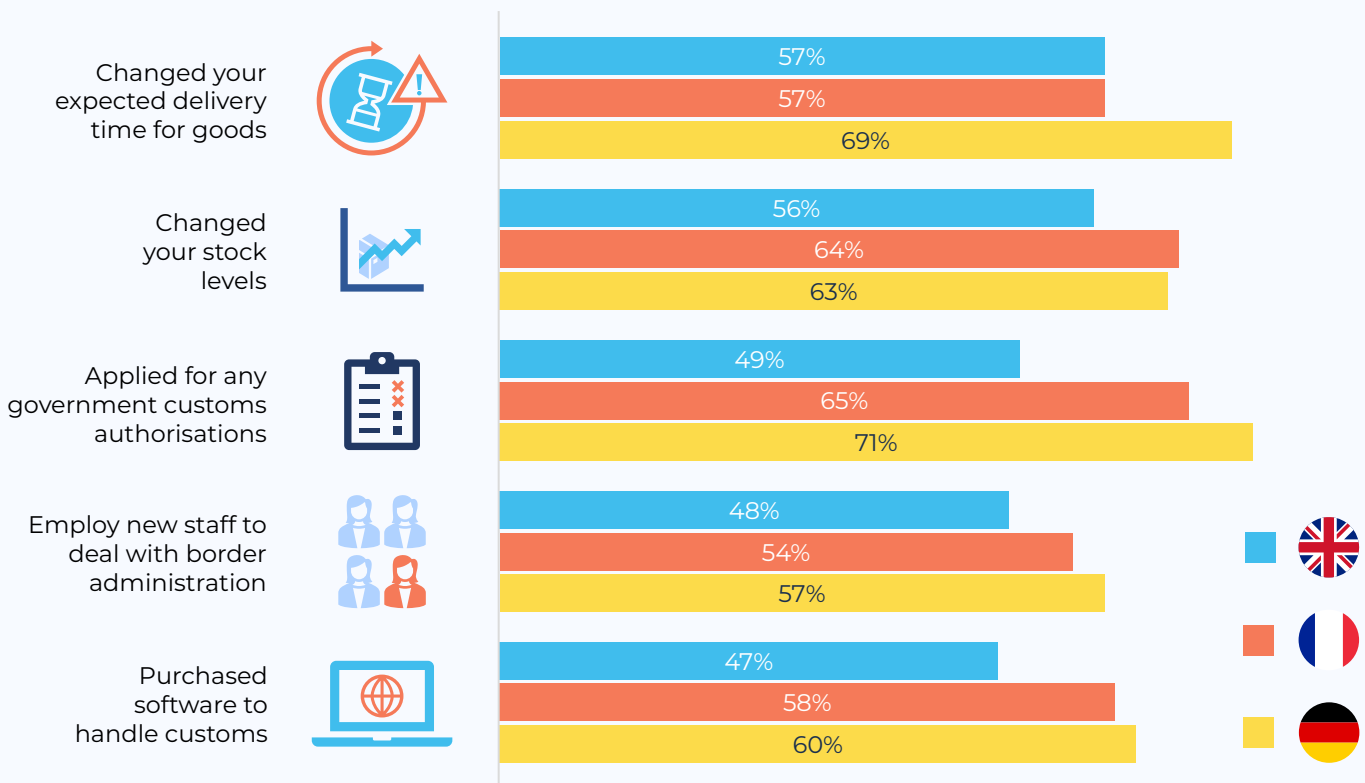
“Latterly, we do a lot more pre-clearance... that streamlined the delivery... But that only came in 12-24 months ago.”

Electronic component supplier



Changes in UK, French and German businesses activity

% of respondents saying they have had to do this



Question: Thinking about your business operation since the start of 2024, have you done any of the following?

Delivery times

- French businesses reported shorter delivery times compared to previous years, unlike UK and German businesses
- Businesses in all countries cite difficulties with the border as the most common reason for longer delivery times
- UK responses show a sharp rise in respondents blaming the border for longer deliveries compared to 2023

Consistent with UK findings from previous reports, increasing delivery times remains one of the responses most commonly associated with difficulties at the border. This is consistent with UK findings from our previous reports.

For businesses, potential border delays (whether or not they actually occur) represent an operational risk. In response, businesses have tended to build in contingency to protect

those operations. Extending their delivery times is one way to do this. Delivery times therefore represent cost but are also a barometer of confidence in supply chains.

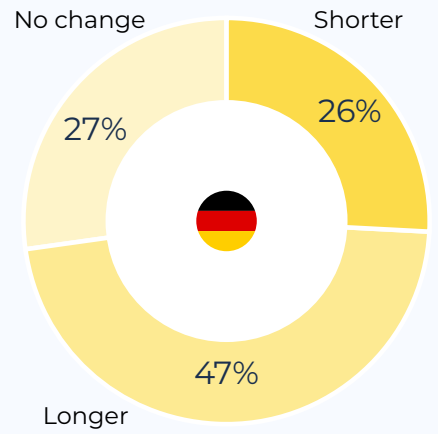
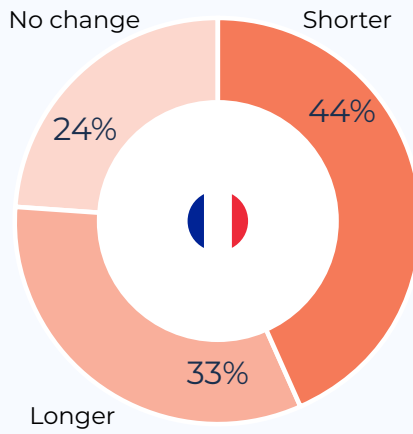
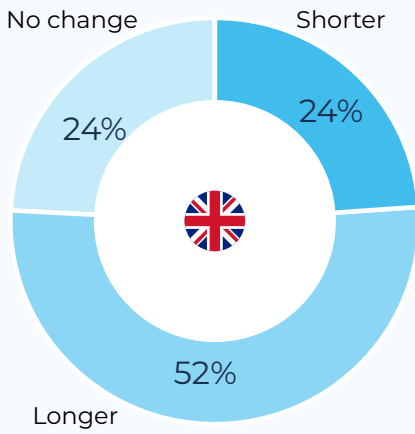
UK responses show a significant increase in businesses blaming difficulties at the border as a reason for higher delivery times. In 2024, the proportion citing difficulties at the border jumped to 65% compared to 41% in 2023, 47% in 2022 and 41% in 2021.

French businesses bucked the trend in reporting net shorter delivery times in 2024 compared to 2023. This may relate to different EU versus non-EU trade patterns in France, compared to UK and German trade.

German businesses reported more acute capacity issues than their French and UK counterparts (e.g. shortages of containers/ shipping and drivers at home).

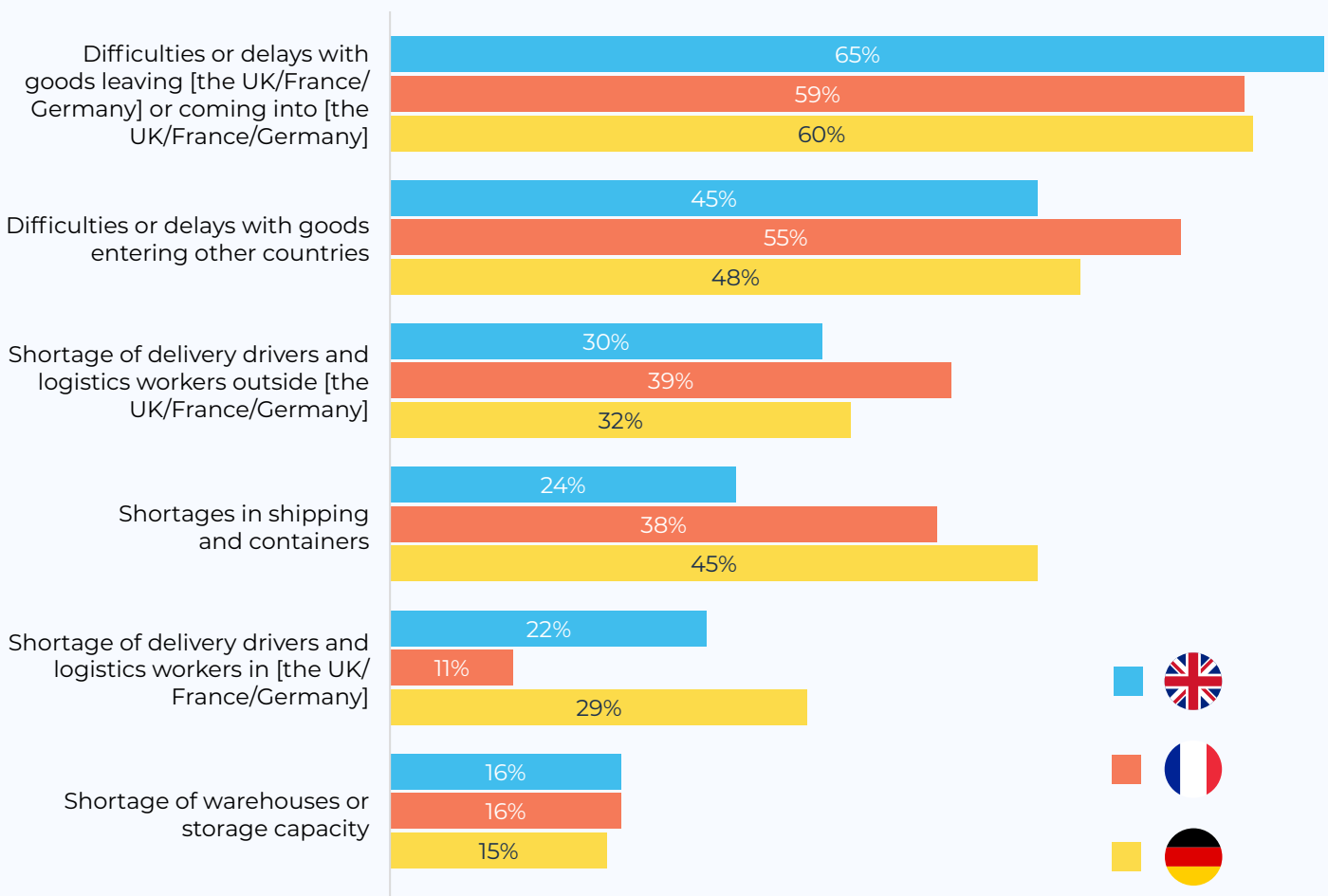
Change in expected delivery time 2024

% of all UK/French/German respondents who have changed their expected delivery times



Reasons for increased delivery times

% of UK/French/German respondents with higher delivery times selecting each explanation



Question: What are the main reasons for this change in expected delivery times for the UK?

Operations

- Businesses have adjusted operations in a similar way across the three countries
- Businesses are paying more for import administration and representation in overseas markets
- The proportion of UK businesses applying for government authorised schemes increased from 28% in 2023 to 46% in 2024

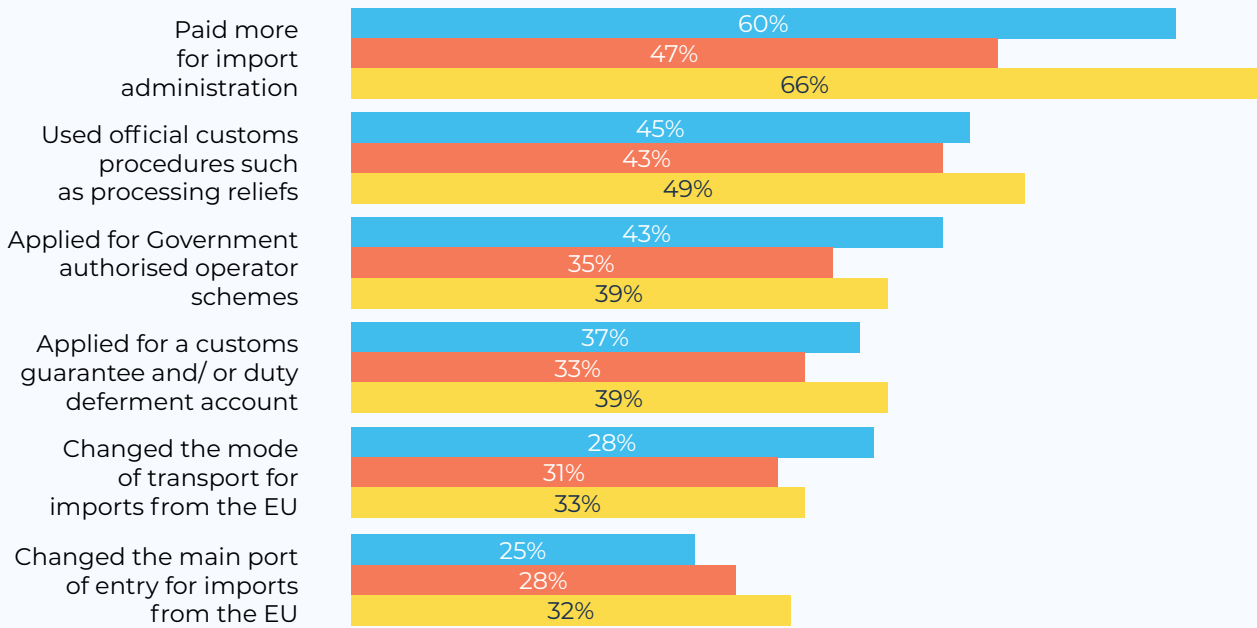
Businesses across the UK, France and Germany continue to adapt their operations to the border. A significant proportion use customs procedures or authorised schemes for both imports and exports. However, there are differences in how they have responded to imports and export requirements.

For imports, businesses in all countries are most likely to be paying more for administration. Less than a third of businesses have changed routes or their mode of shipping. These levels are similar to previous years for UK respondents, suggesting this is a natural level of churn and adaptation.

For exports, German businesses are more likely to have found or established representation in the UK. A slightly smaller proportion of French and UK businesses (36% and 39% vs 49%) have done the same in their respective export markets.

Changes implemented by importers

% of UK/French/German respondents who have done each action since the start of 2024

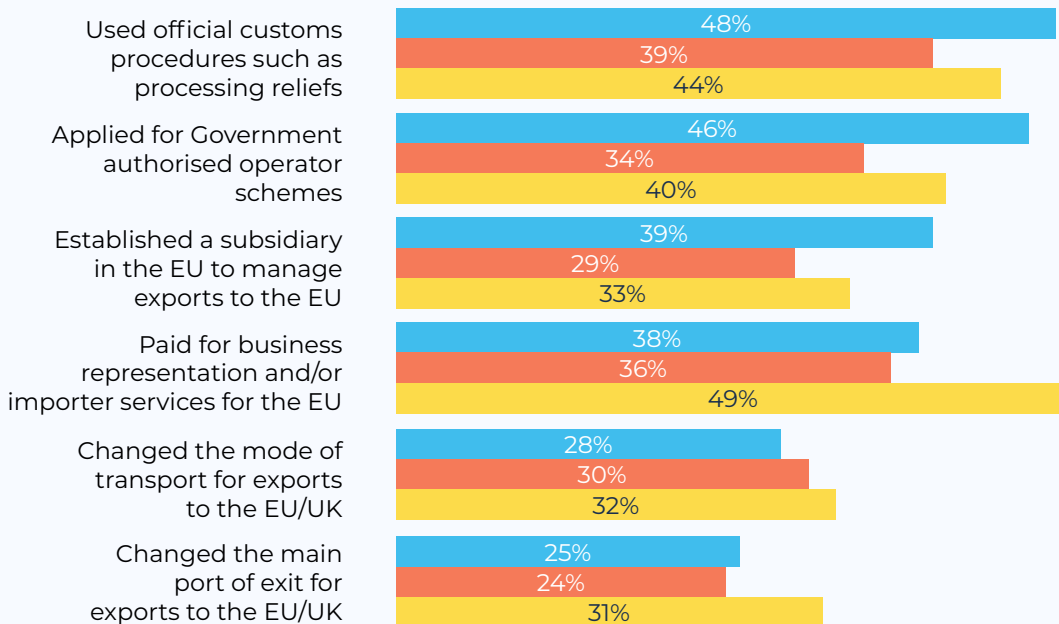


Question: You said that you import from the [EU/UK]. As part of your import process, have you done any of the following since the start of 2024?



Changes implemented by exporters

% of UK/French/German respondents who have experienced each problem



Question: You said that you export to the UK/EU. As part of your export process to the UK/EU, have you done any of the following since the start of 2024?

Inventory

- Responses suggest the majority of businesses in all countries increased inventory by 10% or more
- French businesses were less concerned about global supply chains and more concerned about future price rises
- Demand is a more important determinant of inventory than border issues

As with previous UK results, inventory levels appear to be more closely associated with demand factors than border operations.

Businesses from all three countries reported increases in stock of similar proportions. Most had increased stock levels by 10% or more. Most cited increases in demand (40%+), bulk deals and concerns over future price rises as reasons for increasing inventory. Border issues represented less than a third for responses.

French businesses appear to be notably more concerned about future price rises and German businesses more concerned about the UK border and global supply chain instability. French businesses were least concerned about global supply chains.

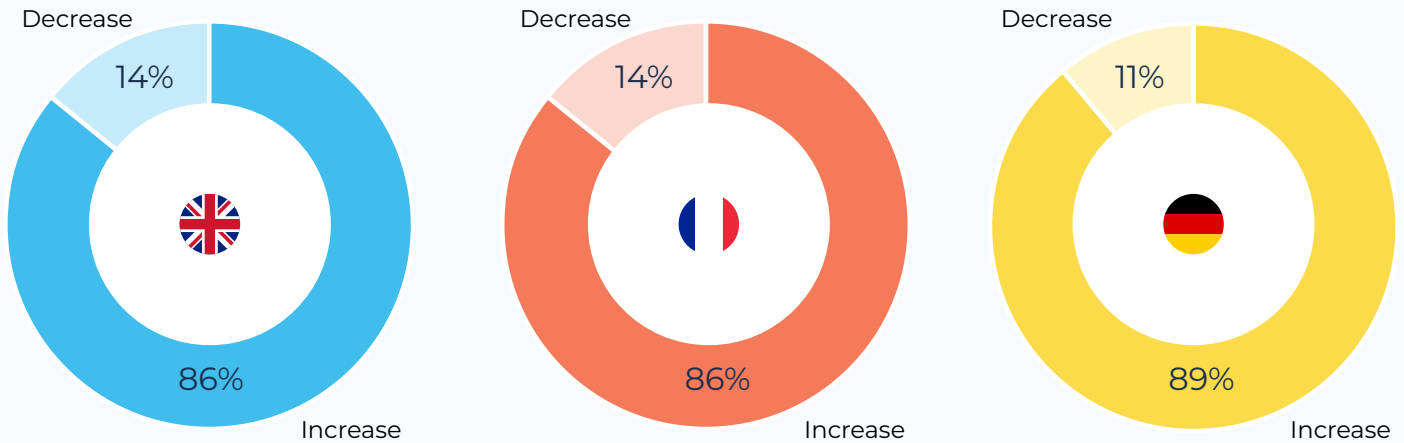
“There is always more complexity. The Single Trade Window has been postponed and that shows that it will remain complex for a quite a bit of time.”

Train operator



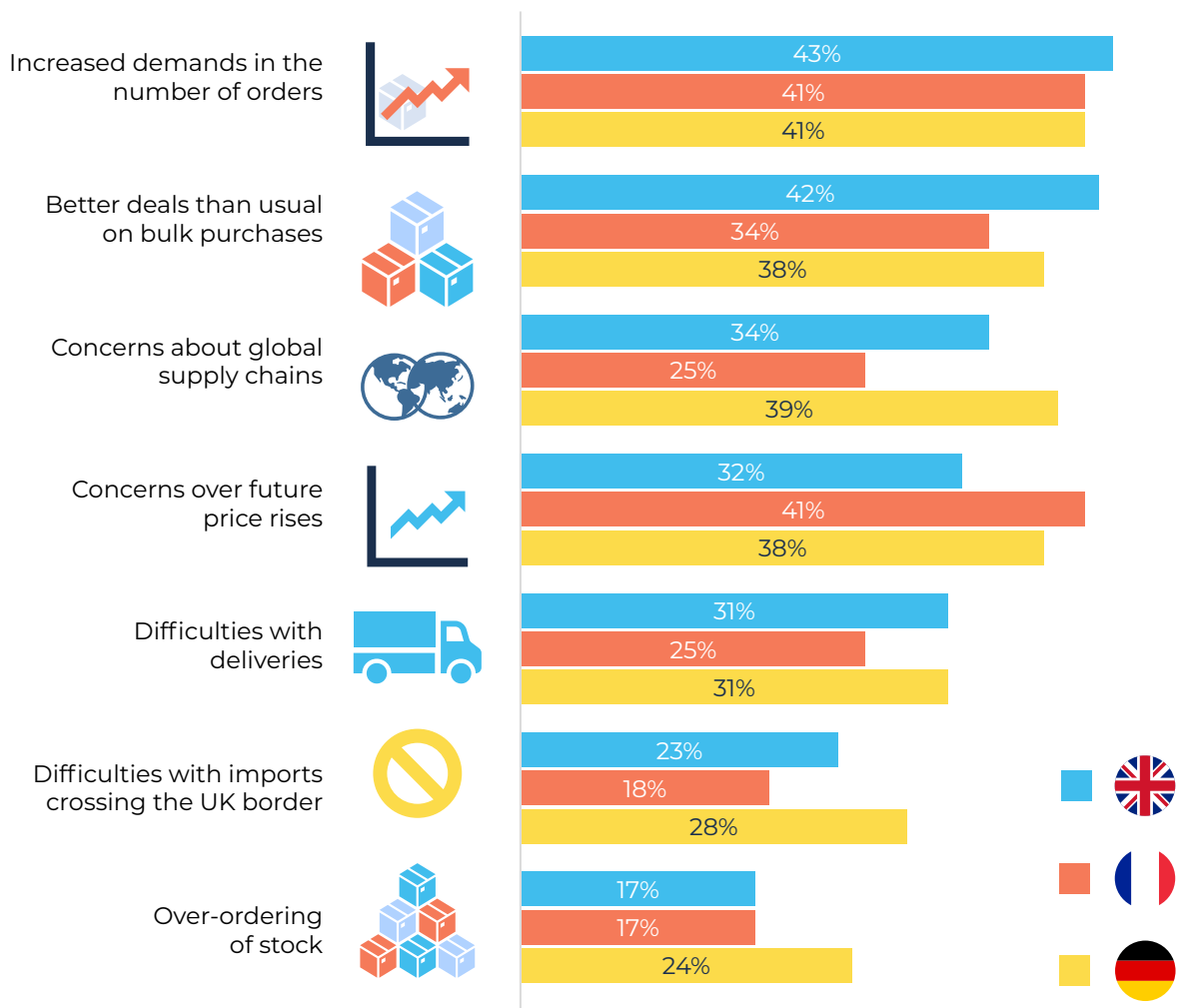
Changes in inventory

% of UK/French/German respondents who have changed stock levels



Reasons for change in inventory

% of UK/French/German respondents who said they changed stock selecting each explanation



Question: What are the main reasons you have changed your stock level?

The Future





The Future

Businesses remain confident in their ability to adapt to the issues presented by the border. They continue to consolidate their strategies in response to external pressures.

Perhaps surprisingly, German companies – despite facing the greatest difficulties at the UK border – are the most optimistic about trade in the year ahead.

UK businesses are notably less confident than they were in 2023, across all areas. We do not have data for French and German businesses before 2024, but their levels of confidence are similar to those of UK businesses in the same year.

Perhaps not surprisingly, businesses in all countries expressed greatest confidence in their own processes, their own country's borders and deliveries in their own territories.

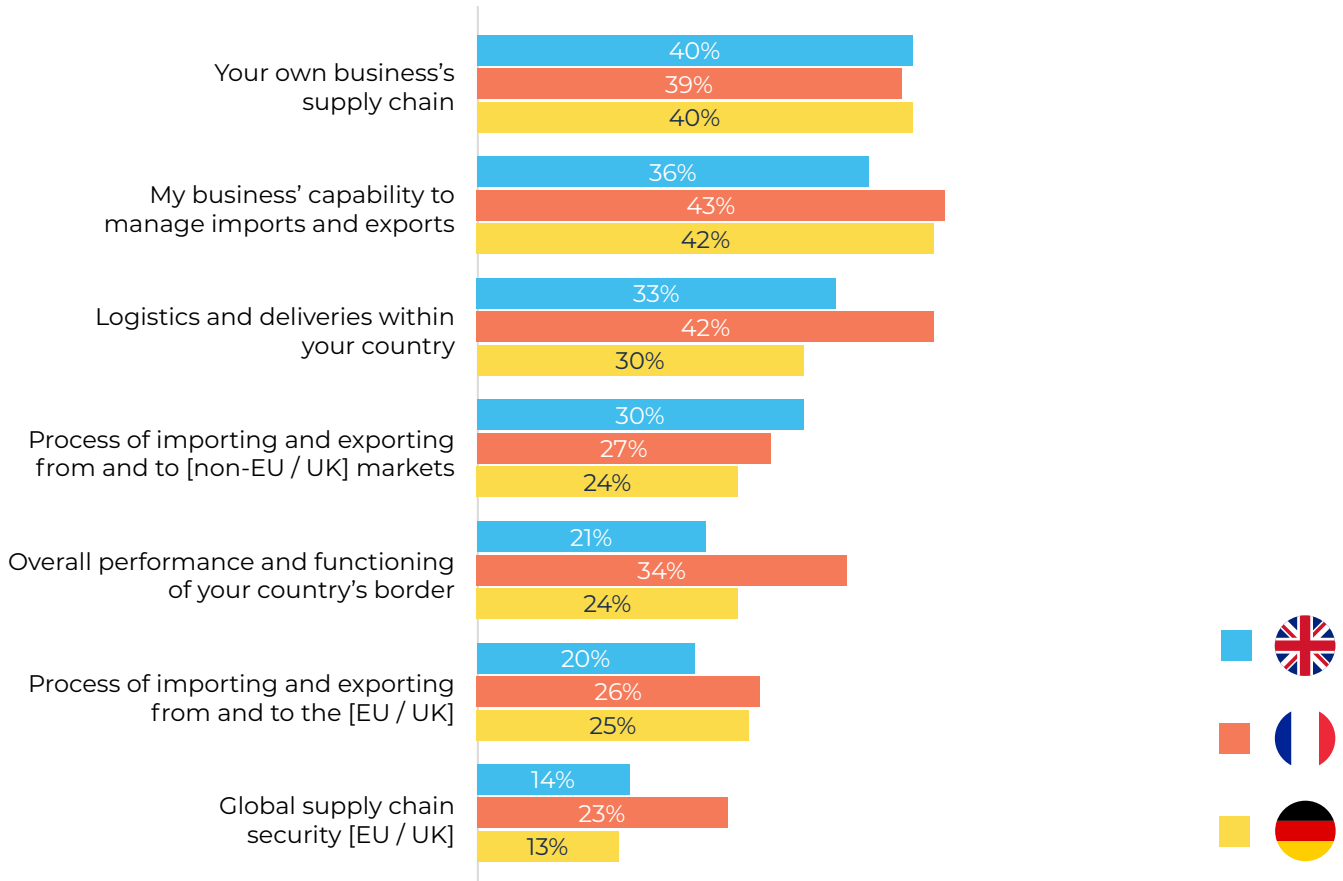
In each country, businesses showed similar levels of confidence in different sources of help. French and German businesses showed considerable trust in the EU as a source of meaningful assistance. UK businesses understandably placed less trust in the EU. Surprisingly, 46% of UK respondents did still express confidence in receiving meaningful assistance from the EU – a similar level to confidence in receiving assistance from their own government (44%).

“You never know what the US is going to do – that is a bit stressful.”

Space / Communications company

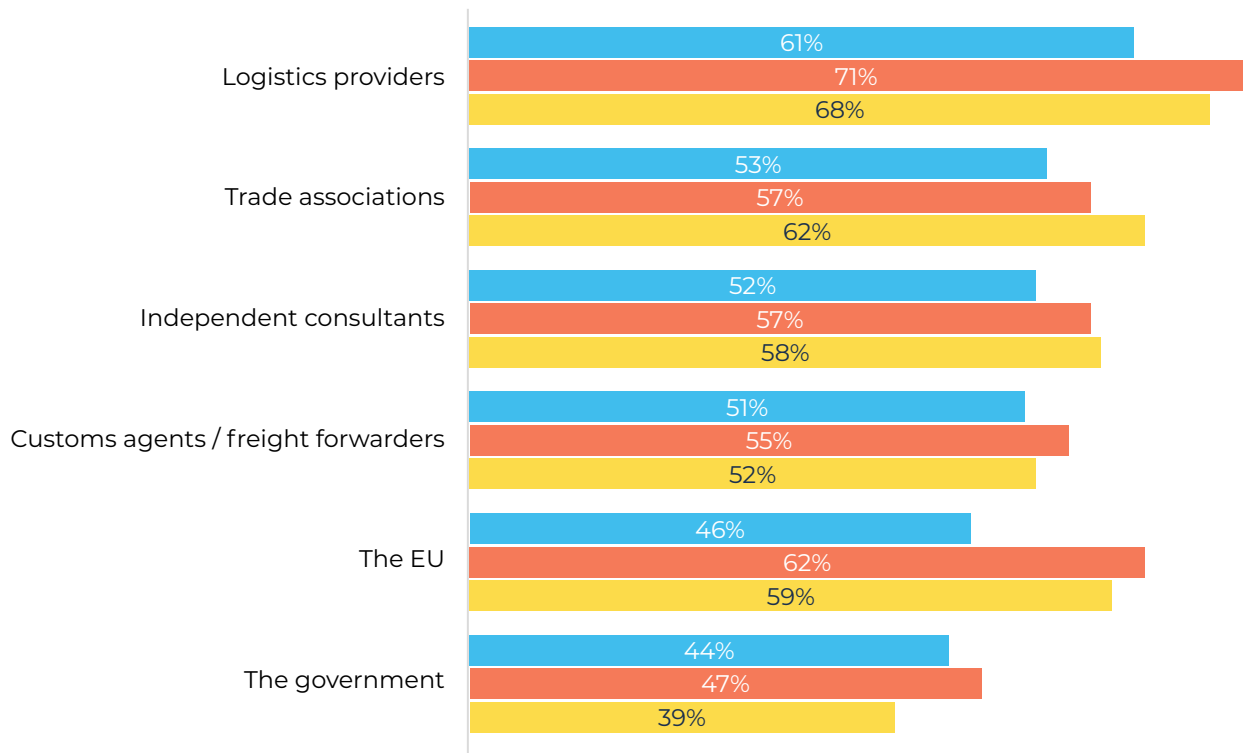
Net confidence in:

% of all respondents that are 'more confident' minus % of all respondents that are 'less confident'



Net confidence in receiving assistance from:

% of all respondents that are 'confident' minus % of all respondents that are 'unconfident'



Question: If trading conditions deteriorate in the near future, how confident would you be about receiving meaningful assistance from any of the following?

Expectations

- German businesses are most optimistic for trade in 2025: 52% expect trade with the UK to grow, and 58% with the rest of the world
- French business are most pessimistic, particularly in their expectations for trade with the UK (36% expect growth)

UK, French and German businesses are broadly consistent in their expectations for EU/UK trade – and mildly positive. They expect this to improve in 2025. They are similarly positive in their expectations for trade with the US – though our survey pre-dated President Trump's announcement of tariffs.

Looking ahead, German businesses are most concerned about cost pressures and tariffs, with the UK businesses largely sharing those concerns. French businesses, by contrast,

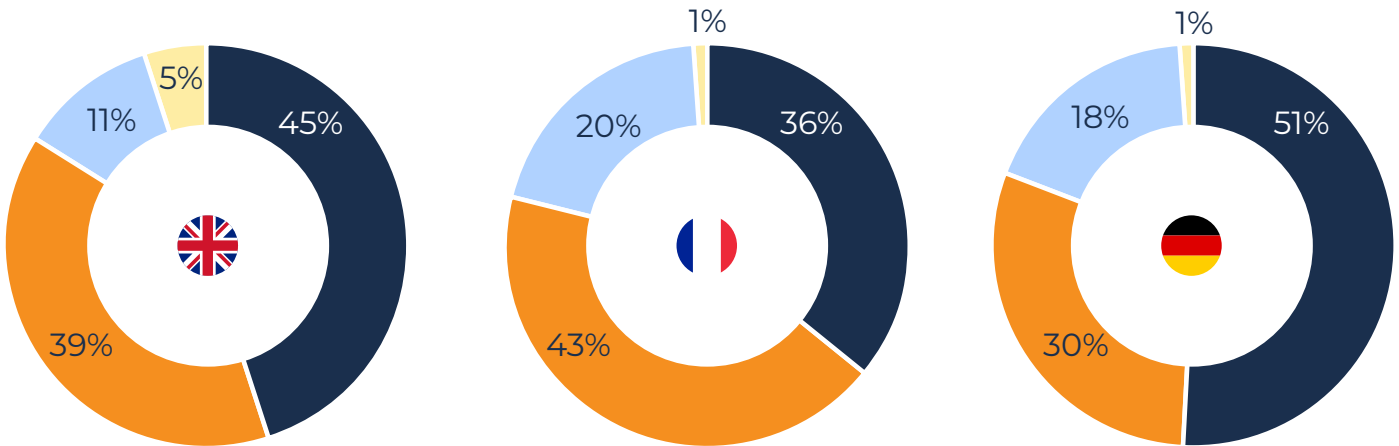
are much less concerned about supply chain stability. They are instead concerned about instability at home, likely reflecting the crisis in French domestic politics at the time of our survey.

UK businesses are evenly balanced in their expectations for their globalised supply chains in general: they have no clear view on whether they expect to rely more on cross-border or localised supply chains in 2025. They are also noticeably less concerned about tariffs than their counterparts.

French and German businesses, by contrast, are notably more pessimistic about globalised supply chains. They both expect to rely less on international and more on local supply chains.

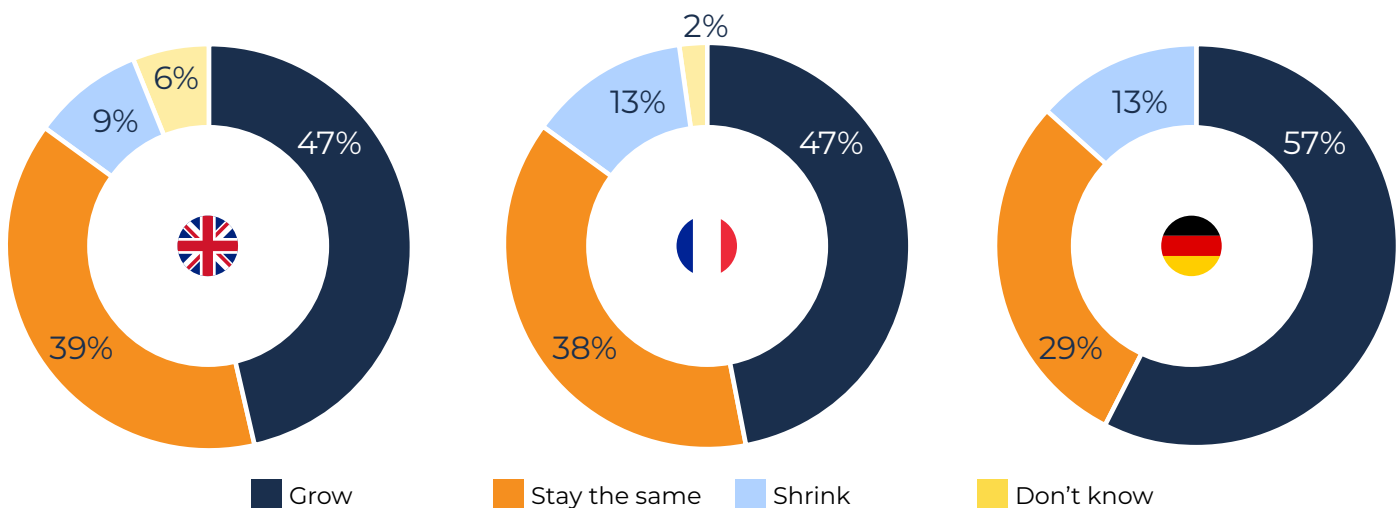
Expectations of UK/EU trade

% of respondents selecting each option



Expectations of rest-of-world trade

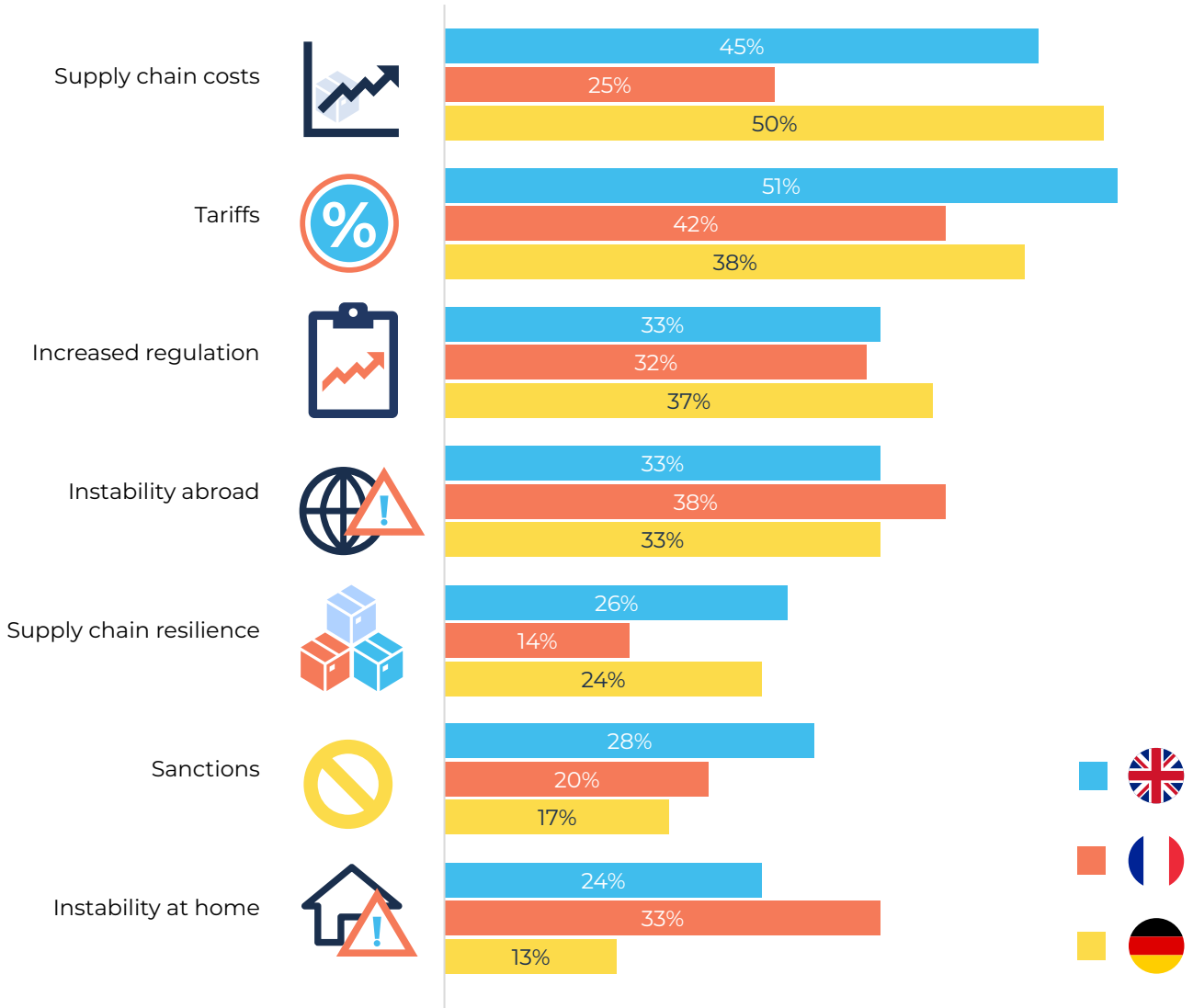
% of UK respondents selecting each option



Grow
 Stay the same
 Shrink
 Don't know

Concerns for the future of trade

% of all respondents selecting their top three concerns



Question: Above are a number of challenges businesses may have faced at the UK border. Which, if any, have you faced during 2024? Please select all that apply.

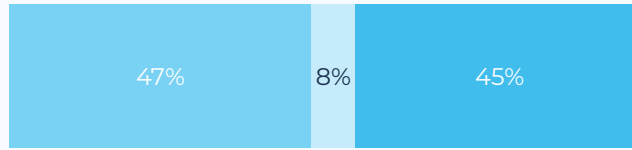


Attitude to globalised supply chains

% of respondents saying which statement comes closest to their view

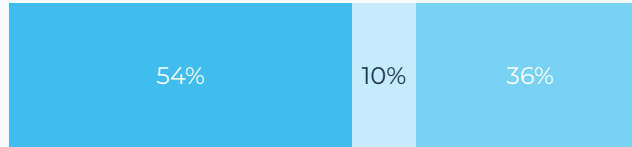


I expect trade between the UK and the US to get materially easier over the next year



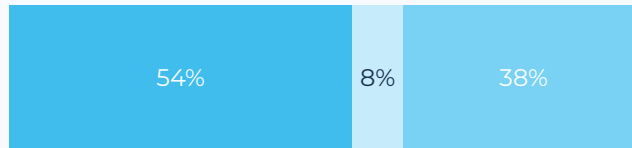
I expect trade between the UK and the US to get materially harder over the next year

I expect trade between the UK and the EU to get materially easier over the next year



I expect trade between the UK and the EU to get materially harder over the next year

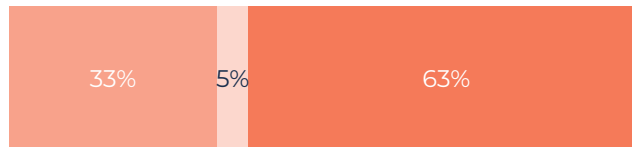
I anticipate businesses in my sector will increasingly depend on cross-border trade to enhance growth and competitiveness



I anticipate businesses in my sector will reduce reliance on cross-border trade and prioritise localised production to strengthen supply chains

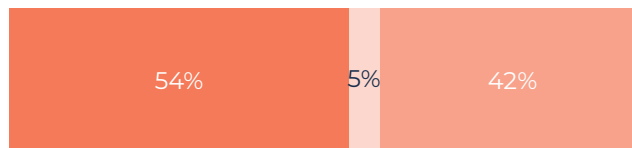


I expect trade between France and the US to get materially easier over the next year



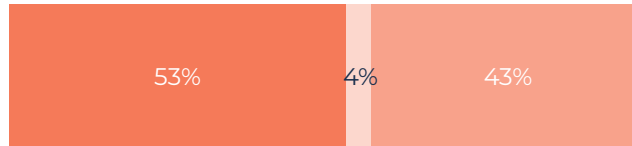
I expect trade between France and the US to get materially harder over the next year

I expect trade between France and the UK to get materially easier over the next year



I expect trade between France and the UK to get materially harder over the next year

I anticipate businesses in my sector will increasingly depend on cross-border trade to enhance growth and competitiveness



I anticipate businesses in my sector will reduce reliance on cross-border trade and prioritise localised production to strengthen supply chains

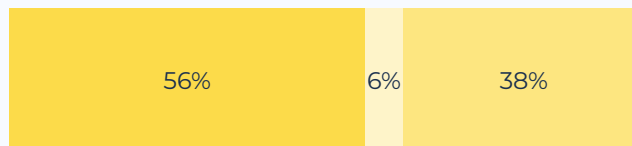


I expect trade between Germany and the US to get materially easier over the next year



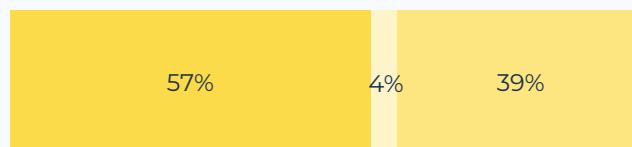
I expect trade between Germany and the US to get materially harder over the next year

I expect trade between Germany and the UK to get materially easier over the next year



I expect trade between Germany and the UK to get materially harder over the next year

I anticipate businesses in my sector will increasingly depend on cross-border trade to enhance growth and competitiveness



I anticipate businesses in my sector will reduce reliance on cross-border trade and prioritise localised production to strengthen supply chains

Trade and Customs Traffic



Trade and Customs Traffic

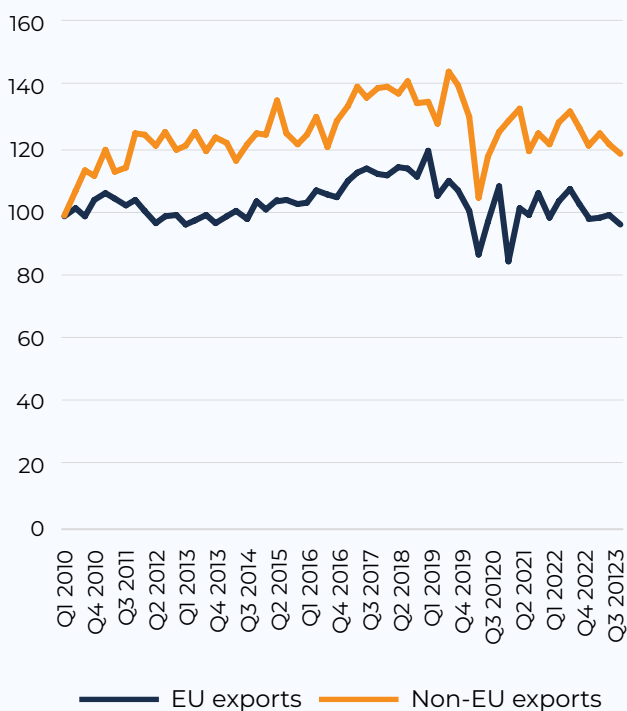
UK trade in 2024 appears to have sustained patterns established in the wake of the Covid pandemic and Brexit.

Adjusted for inflation, UK goods exports lost the momentum they held before the pandemic. This applies to trade with the EU and the rest of the world.

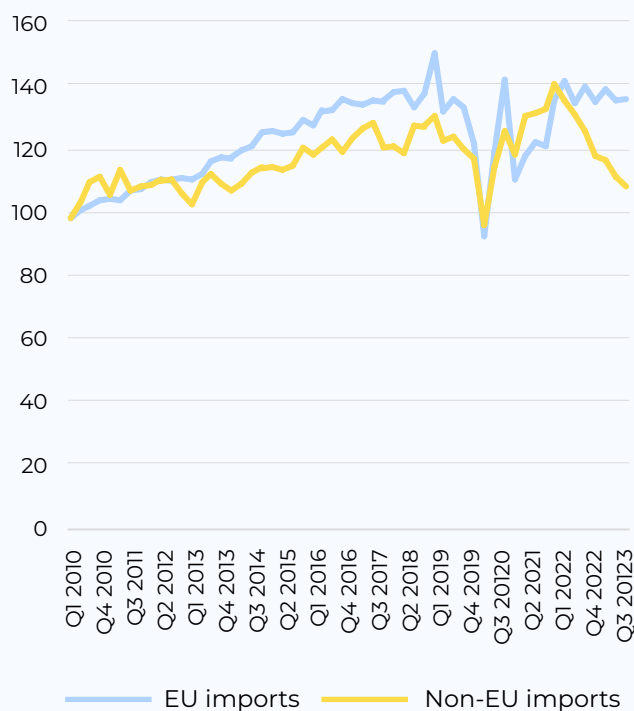
Disentangling a 'Brexit effect' from the general effects of weak global growth is difficult. There was a clear drop in UK exports to the EU after 2021 which has not recovered. Whether this results from Brexit or weak EU demand is hard to say – it seems likely that both will have played a part (see UK Imports and Exports).

UK import and exports, adjusted for inflation

UK exports
Inflation adjusted



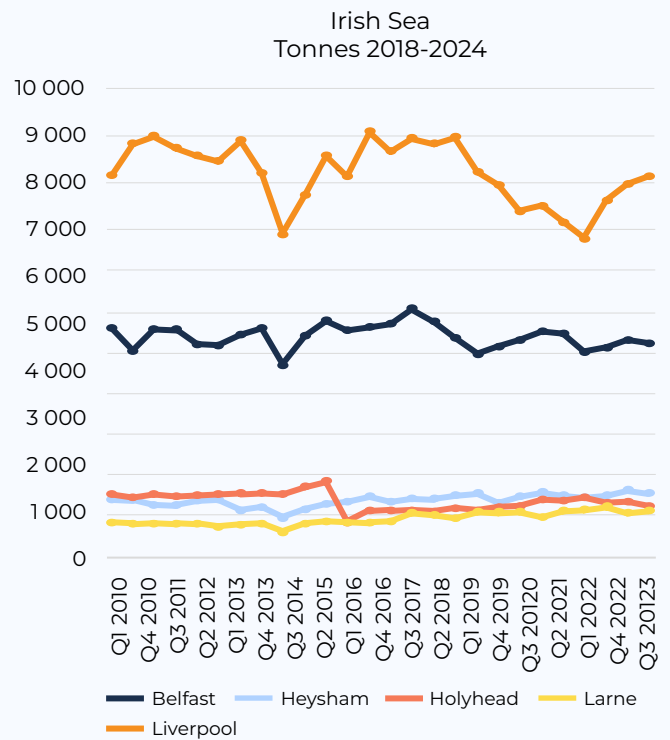
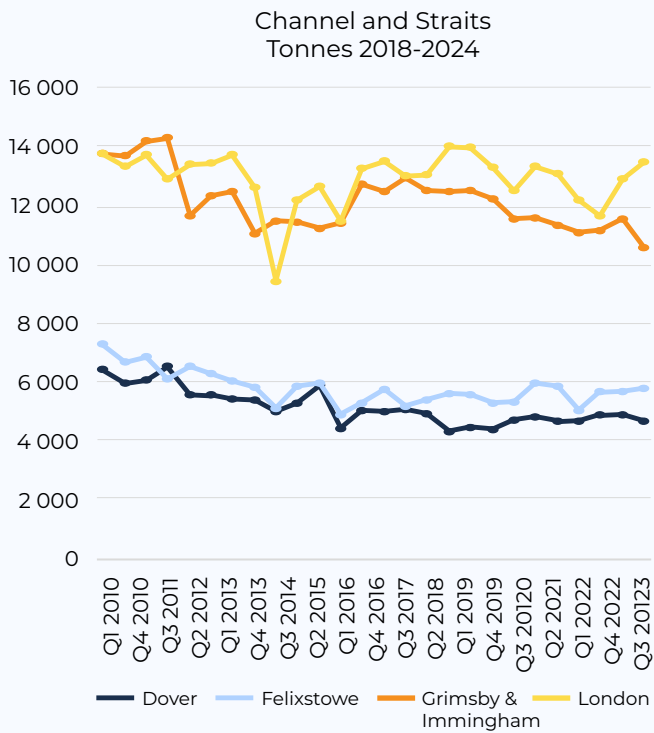
UK imports
Inflation adjusted



UK imports from the EU have been more resilient than both imports from the rest of the world and exports to the EU (see UK Imports and Exports). The UK's gradual approach to import controls may have favoured imports from the EU since Brexit. This approach concluded in early 2024 when the UK began to apply controls consistently across EU and non-EU imports. We may see the effects of this in future years.

Brexit effects now seem firmly established for 'transit' between the EU and Ireland. The most important of these is the impact on the landbridge linking France and Ireland via Dover and Holyhead (see RoRo patterns). Volumes at both of these ports have fallen significantly since 2021.

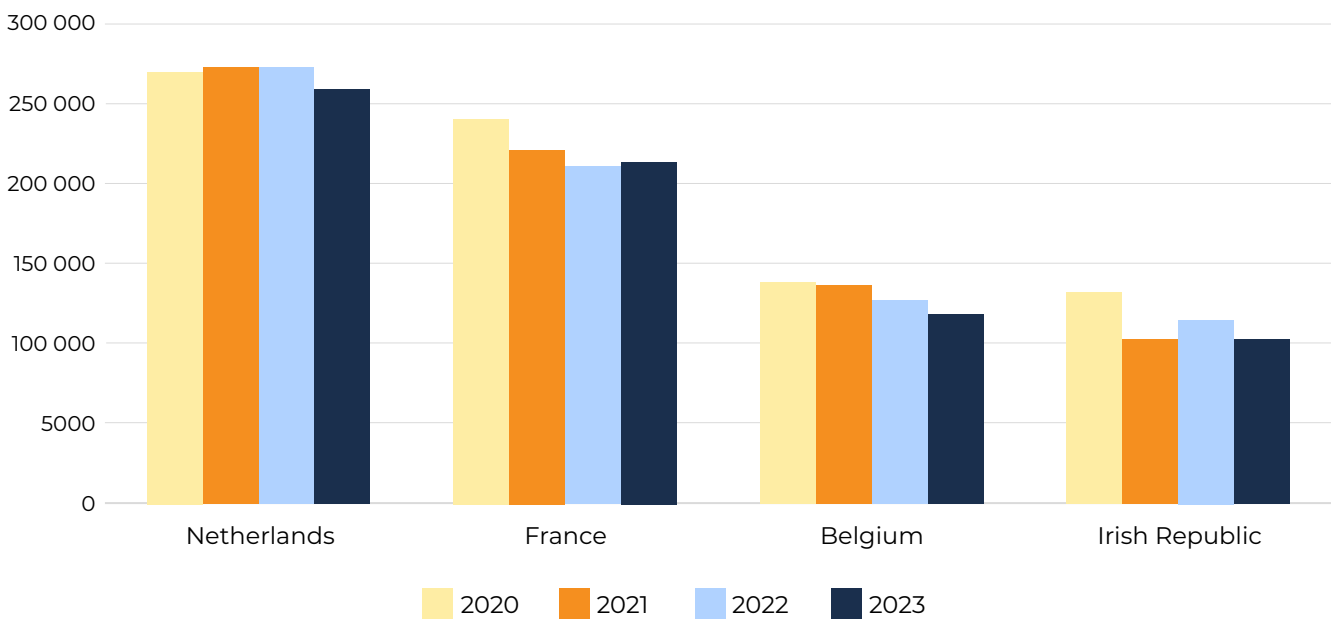
Selected UK ports' trade by volume



On the other hand, London appears to be a clear winner in the competition for eastern seaboard and global trade, mostly at Felixstowe's expense. On Irish Sea routes, Liverpool has consolidated its hold on Great

Britain – Northern Ireland movements, suggesting trade to Northern Ireland now travels north and across rather than across and up through the Irish Republic as before.

UK trade volumes with neighbouring countries



These transit choices are reflected in national patterns of port traffic between the UK and its neighbours. Volumes through France and Ireland have both fallen. The Netherlands has

been much more stable. Harder to explain is a modest but sustained fall in transit through Belgium.

Approach



Approach

The findings in this report draw on research using a variety of methodologies and data sources to build a comprehensive picture of experiences of using the UK border:

Analysis of trade statistics

We reviewed trade data from official sources, including ONS and DfT. The findings from this review provide context for the original primary research and describe the UK experience of trade. All figures are inflation adjusted, except where noted otherwise.

Survey of trading businesses

We conducted an online survey of senior decision-makers at businesses which import products, export products from and/or carry out international deliveries. Our sample consisted of 300 businesses in each of UK, France and Germany. But changes to sample composition mean that comparisons should be treated with caution. Note that in some cases totals may not add to 100% due to rounding.

In-depth interviews with trading businesses

We conducted in-depth qualitative interviews with 11 senior decision-makers at 9 different businesses with direct experience of using the UK border. The findings are used to provide explanatory insight and illustrative colour to supplement the findings from the quantitative survey.

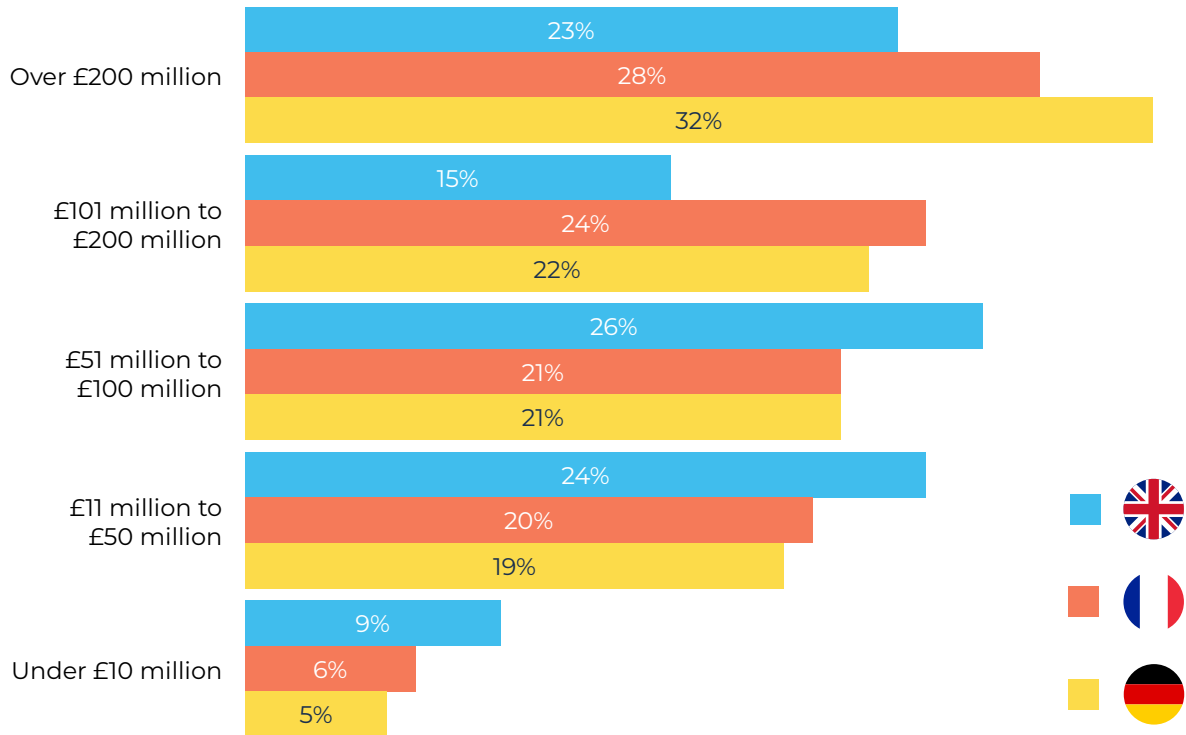
Where relevant to UK businesses, this report compares findings with the findings from our previous State of the Border research.



Profile of respondents

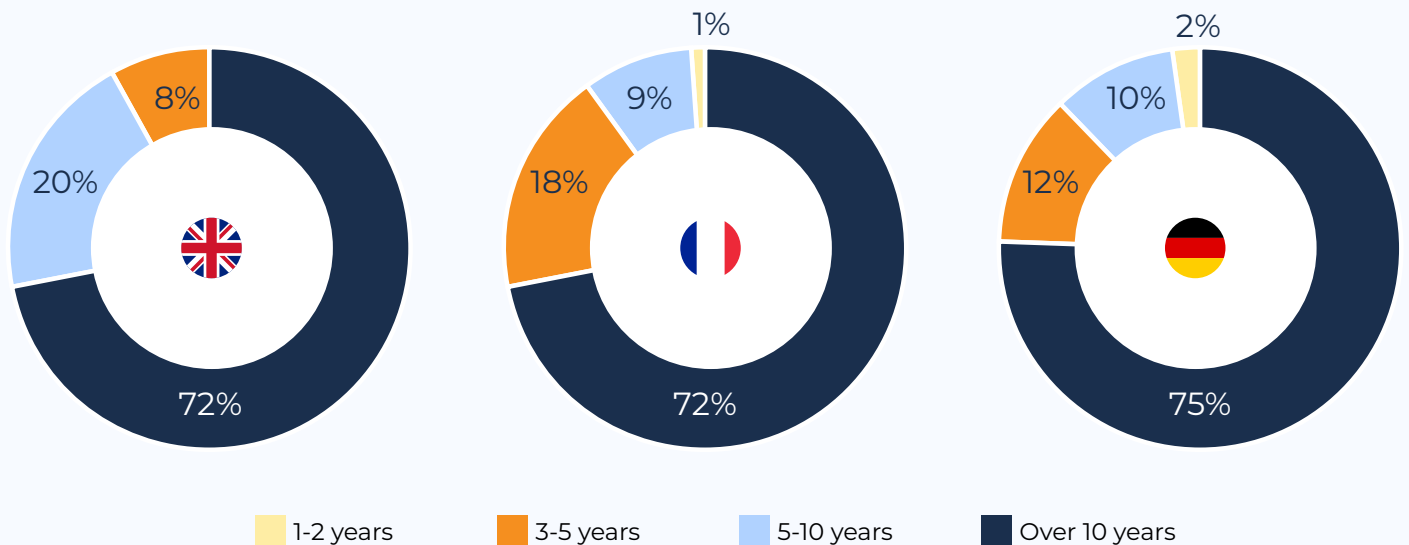
Commercial characteristics

Annual revenue January 2024-January 2025 UK/France/Germany
 % of all respondents selecting each option as their approximate revenue for this time period



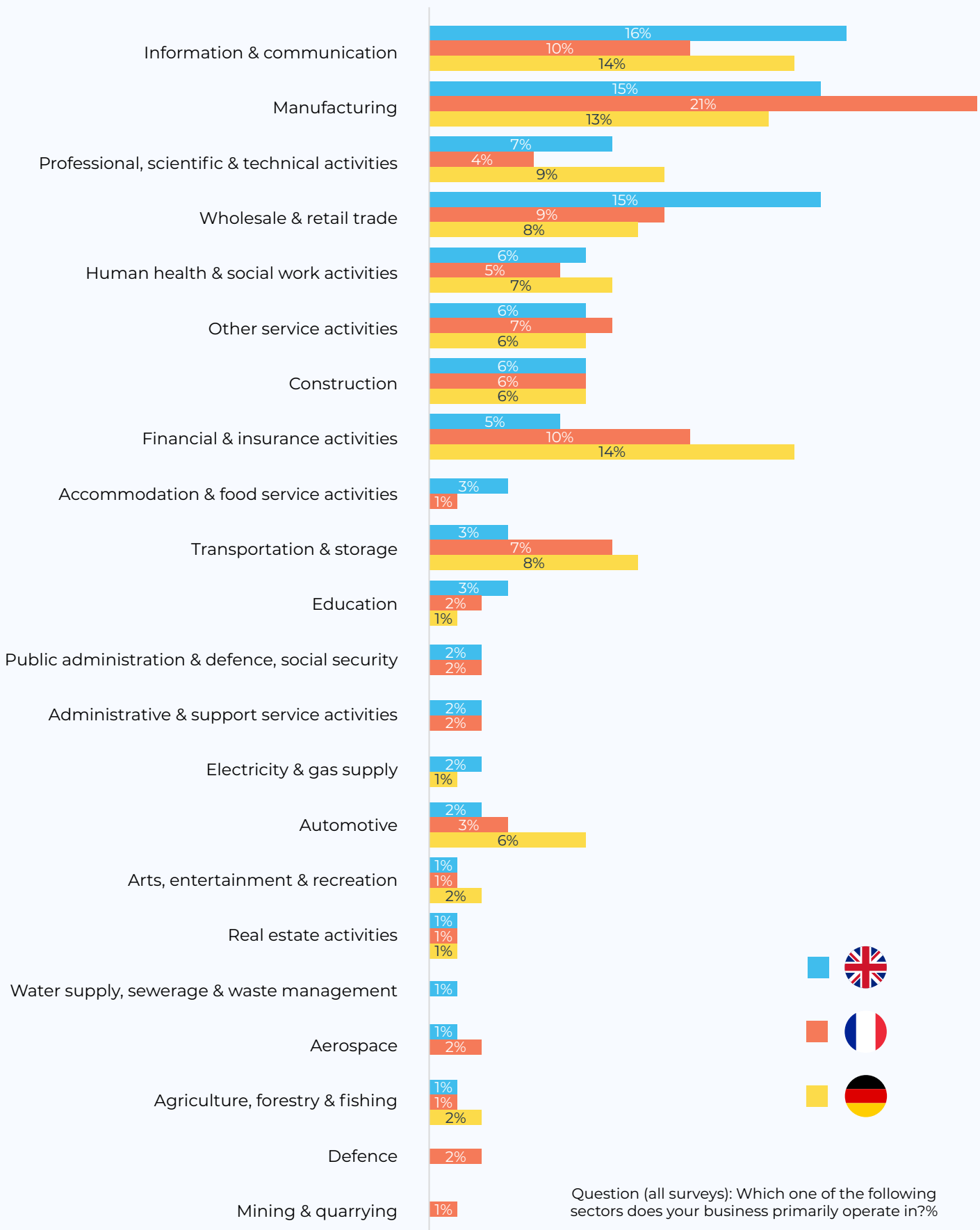
Length of operations

% of all UK/French/German respondents selecting each time frame
 as how long their business has been operating



Sector composition

% of all UK/French/German respondents selecting each sector as the one they operate in

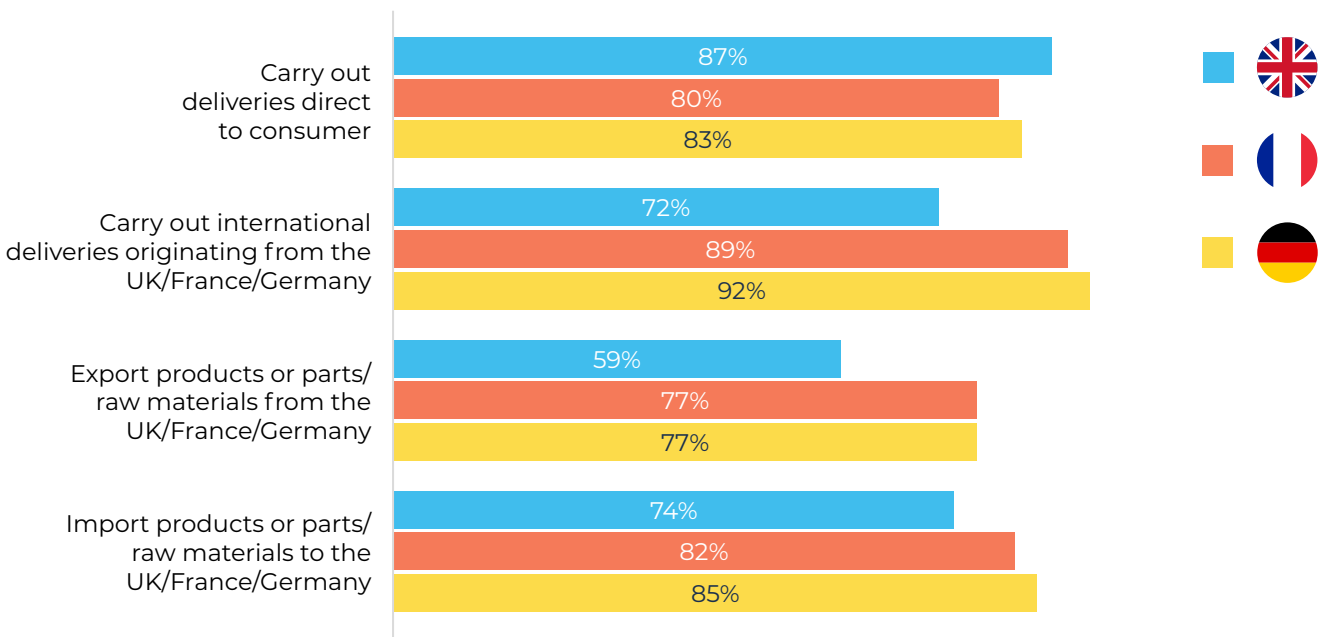




Trade characteristics

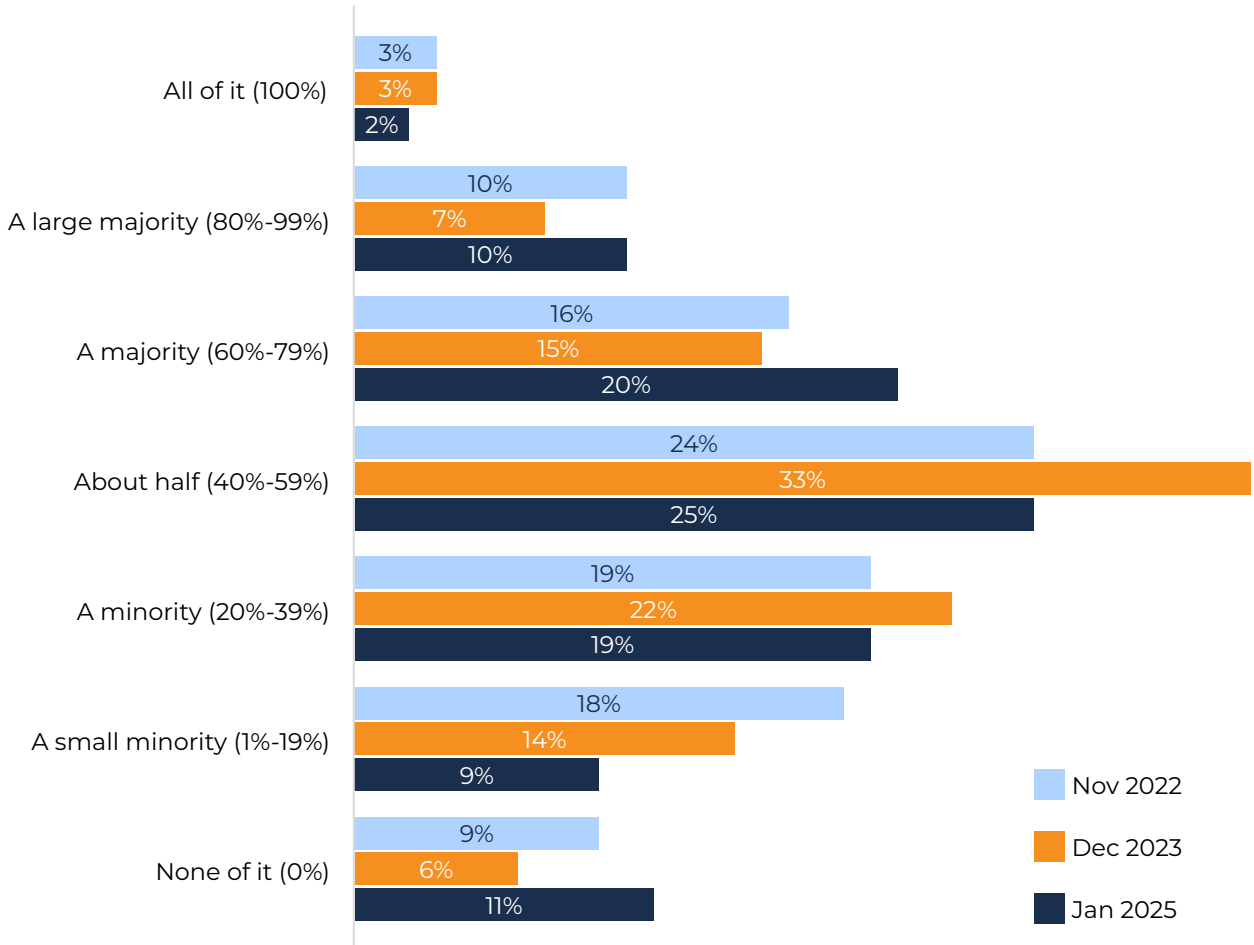
Importers, exporters and international deliveries

% of all UK/French/German respondents selecting each as a business activity they do



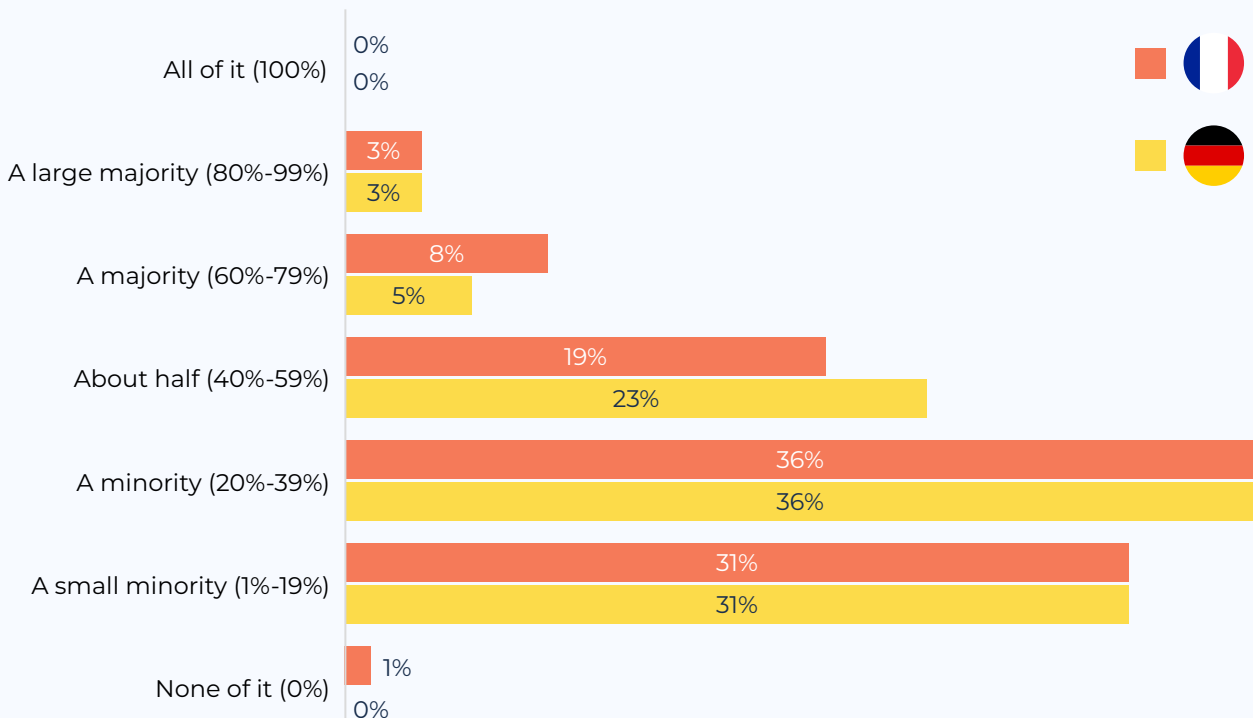
Amount of turnover from EU trade

% of all UK respondents selecting each option as the proportion of their turnover from EU trade



Amount of turnover from UK trade

% of all French/German respondents selecting each option as the proportion of their turnover from UK trade



Profile of interviewees

We conducted in-depth interviews with decision-makers at nine businesses with direct experience of using the UK border. Interviews were conducted online and lasted 30-45 minutes.

Global Director, Snack manufacturer, 1000+ employees

Supply and Operations Manager, Logistics services, 1000+ employees

Central Logistics team, PPE manufacturer, 500-999 employees

Supply Chain Executive, Spices importer, 100-249 employees

Head of Customs, Retailer, 1000+ employees

Export Control Officer, Scientific and technical parts exporter, 50-99 employees

Customs implementation, Customs brokerage service, 1000+ employees

Head of Strategy, Customs brokerage advisory, 1000+ employees

Former COO, Commercial cycle equipment business, 6-9 employees



Authors

Written by Christopher Salmon. This report was produced by clearBorder with support from Global Counsel. Polling design and survey analysis led by Emma Morris with Chris Levy. Trade statistics analysis by Stephen Adams. Polling was conducted between 30th January and 3rd February 2025. Interviews were completed between Thursday 16th January and Thursday 13th February.

Full survey results are available [here](#).

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Published on 24/03/25

clearBorder

About clearBorder

clearBorder helps businesses fix the problems of cross-border trade. We provide expert strategic advice, trade management services and compliance support to help businesses

overcome the challenges of cross-border supply chains. Our expert insight into policy and technology helps businesses shape the future of trade borders.

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The UK Major Ports Group represents nine of the UK's largest port operators, handling 75% of the UK's port volumes. The group's members include some of the busiest ports in the UK, which play a crucial role in facilitating international trade and connecting the UK to global markets.

ukmajorports.org.uk