COUNTRY MARKET REPORT

United Kingdom Economic and Market Outlook

Market strengths, investment pathways and the operating environment

2FAST — MARKET DEVELOPMENT

November 2026 | Data cutoff 1 November 2026

England · Scotland · Wales · Northern Ireland

EXECUTIVE SUMMARY

A large market with specialised strengths

A substantial domestic economy, internationally traded expertise and distinctive industrial and research clusters provide several routes to market.

£3.04tn	69.5m	£522.8bn
Nominal GDP · 2025 [1]	Residents · mid 2025 [5]	Service exports · 2025 [13]

The United Kingdom combines a broad consumer market with advanced services, scientific capabilities and internationally connected manufacturing. Real GDP grew by 1.2% in 2025. Growth continued in the first half of 2026, with a 0.5% quarterly increase in the second quarter; the latest monthly release records 0.7% growth over the three months to August. These are different observation periods, not alternative annual growth estimates. [2–4]

Strength supported by evidence	Areas worth studying
International business services	Financial and professional services, enterprise software, cybersecurity and specialist support for industrial exporters.
Research and advanced production	Laboratory tools, diagnostics support, precision engineering, automation and qualified supply to aerospace and automotive businesses.
Energy and logistics networks	Grid equipment, efficiency services, maintenance, freight technology and temperature-controlled distribution.
A diverse household market	Differentiated foods and ingredients, practical consumer value and services adapted to smaller and older households.

2FAST areas for investigation, informed by [7–9, 13, 19–28]. These are not confirmed sales opportunities.

The operating case is selective. Market size does not remove the need to qualify suppliers, secure local service capacity or demonstrate value to customers. Pay, energy contracts, finance and premises must be costed together. The UK is also not a single regulatory route for goods: Northern Ireland has arrangements that differ from Great Britain. [25, 29, 34–45]

The near-term outlook is for modest growth. The October 2026 OBR forecast is 1.2% for 2026 and 1.0% for 2027; the IMF projects 1.3% and 1.2%. Their different vintages and assumptions should remain visible in business planning. [6, 30]

2FAST ANALYSIS Prioritise a defined customer problem, a credible local channel and a deliverable service proposition. National scale is the starting point for qualification.

SCOPE AND READING GUIDE

One United Kingdom with several operating environments

Data close on 1 November 2026. The report uses information actually published by that date.

The geographical scope is England, Scotland, Wales and Northern Ireland. Great Britain means England, Scotland and Wales only. England-only measures are never treated as UK totals. The Republic of Ireland, the Crown Dependencies and the Overseas Territories are outside the UK aggregates used here.

Read for	Pages
Market position and domestic demand	4–7
Economic structure and sector capabilities	8–13
Trade and inward investment	14–17
Operating costs, establishment and market access	18–21
Locations, logistics and real company examples	22–25
Outlook, commercial pathways and entry decisions	26–29
Methodology, credits and source register	30–34

How to read the evidence

Published observations are attributed to their source. Charts and tables state their period, unit and geography. "2FAST analysis" identifies interpretation or a proposed commercial line of enquiry. Forecasts retain the publishing institution and issue date; no 2FAST return forecast is presented.

The latest complete national accounts and trade year is 2025. Newer monthly and quarterly observations are shown separately. Annual inward FDI stocks and flows refer to 2024; investment project counts refer to the 2025/26 financial year. Research expenditure and regional GDP also have publication lags. [1–4, 13–18, 22–23]

Comparable measures rather than mixed totals

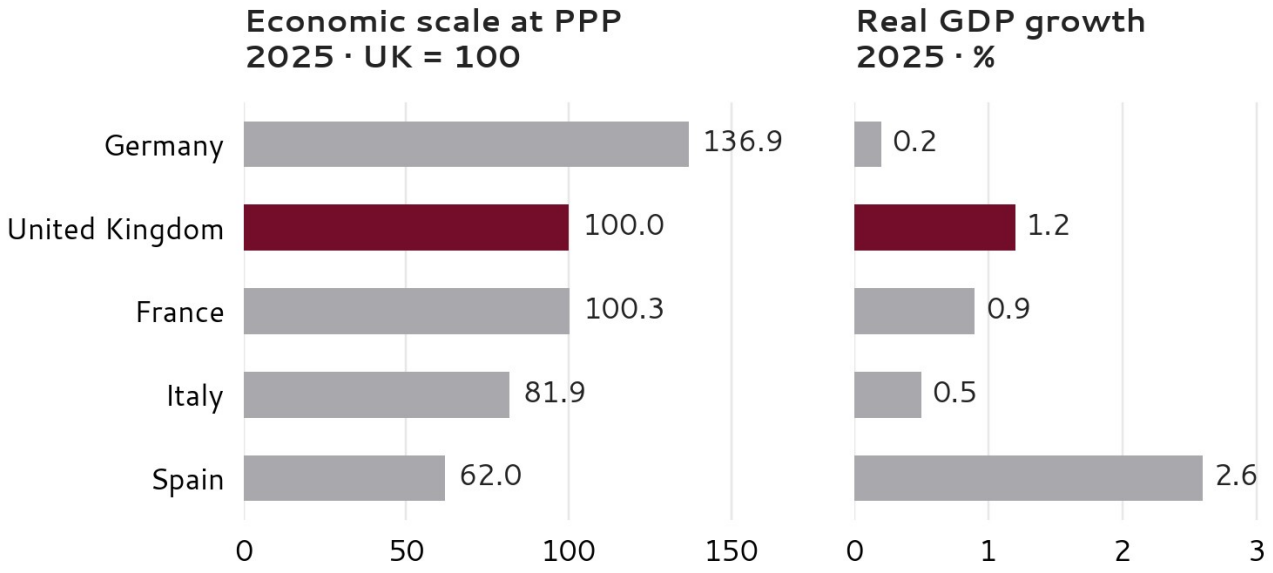
Domestic monetary values are in pounds sterling. European economic scale is compared using the IMF's purchasing power parity measure, indexed to UK = 100; no market exchange-rate conversion is used. A PPP comparison is a measure of real economic scale, not a forecast of sales revenue or the sterling value of foreign purchasing power. [6, 64]

GDP, sector GVA, company turnover, trade receipts and investment stocks answer different questions. They are not added together. The accompanying data workbook records the source, units, scope, period and calculation behind the reported figures.

EUROPEAN POSITION

A major economy alongside continental peers

A single IMF vintage supports comparisons with Germany, France, Italy and Spain.



Source: IMF October 2026 WEO and DataMapper [6, 64]. 2025 estimates. PPP GDP index is derived as country PPP GDP / UK PPP GDP × 100. Growth is annual real GDP change.

At purchasing power parity, the UK and France have similar economic scale, while Germany is larger. Italy and Spain have smaller aggregate economies in this five-country comparison. The measure adjusts for national price levels; it does not describe the cash value of cross-border transactions.

The same vintage places UK real growth in 2025 between Spain's stronger expansion and the slower growth recorded for Germany, France and Italy. The UK therefore offers a large addressable base without requiring a high-growth macroeconomic assumption. Sector demand and customer economics remain more informative than a national ranking. [6]

Country	2026 forecast	2027 forecast
Germany	1.3%	1.1%
United Kingdom	1.3%	1.2%
France	0.4%	0.7%
Italy	0.8%	0.6%
Spain	2.5%	1.8%

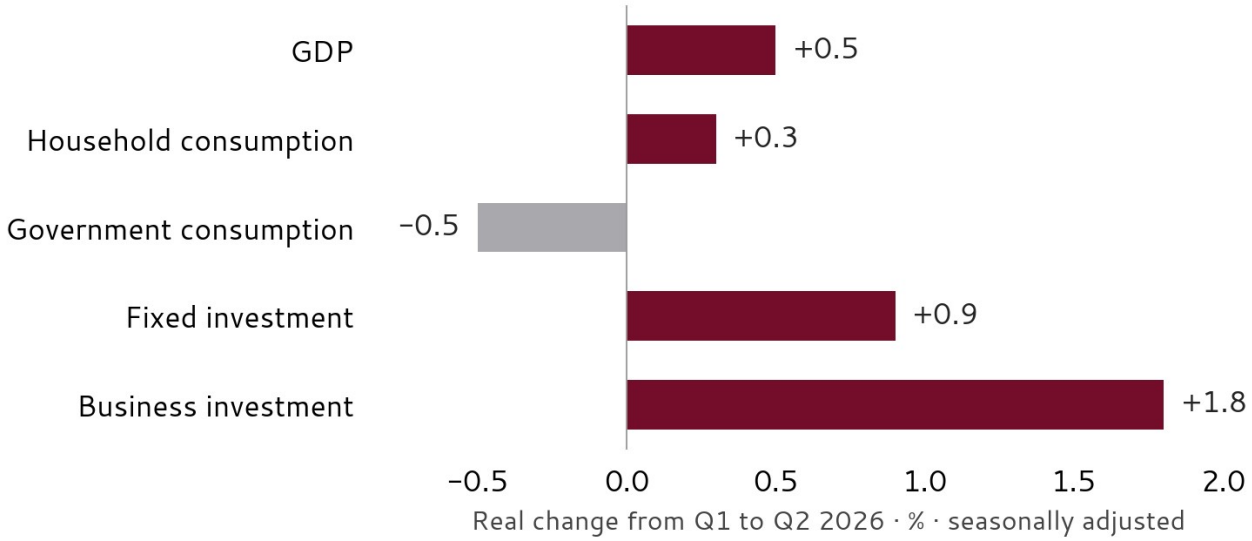
Annual real GDP growth, IMF October 2026 WEO [6]. Forecasts, not actual results.

2FAST ANALYSIS Use peer comparisons to test market scale and business assumptions, then assess the relevant UK customer segment and supply chain.

OUTPUT AND DEMAND

Growth is positive but uneven across expenditure

The economy reached £3.045 trillion at current market prices in 2025. Real growth was 1.2%, and real GDP per head increased by 0.9%. [1, 3]



Source: ONS quarterly national accounts [2]. UK, Q2 2026 versus Q1 2026, real volume, seasonally adjusted. Business investment is part of fixed investment and is not additive.

Household consumption expanded in the second quarter, while government consumption declined. Fixed investment increased, including a stronger rise in business investment. The quarterly national accounts identify net trade as an important contributor to growth. Expenditure components have different weights, so the percentage changes in the chart cannot be summed. [2]

The latest monthly signal

In the three months to August 2026, services output increased by 0.9%, production fell by 0.2% and construction fell by 1.0%. Monthly GDP rose by 0.1% in August. These short-term estimates are subject to revision and should be read with the quarterly accounts rather than annualised mechanically. [4]

Nominal expansion also includes changes in prices: the 4.8% increase in current-price GDP in 2025 was accompanied by a 3.6% rise in the GDP deflator. The deflator covers the price of domestically produced output and is not interchangeable with consumer price inflation. [3]

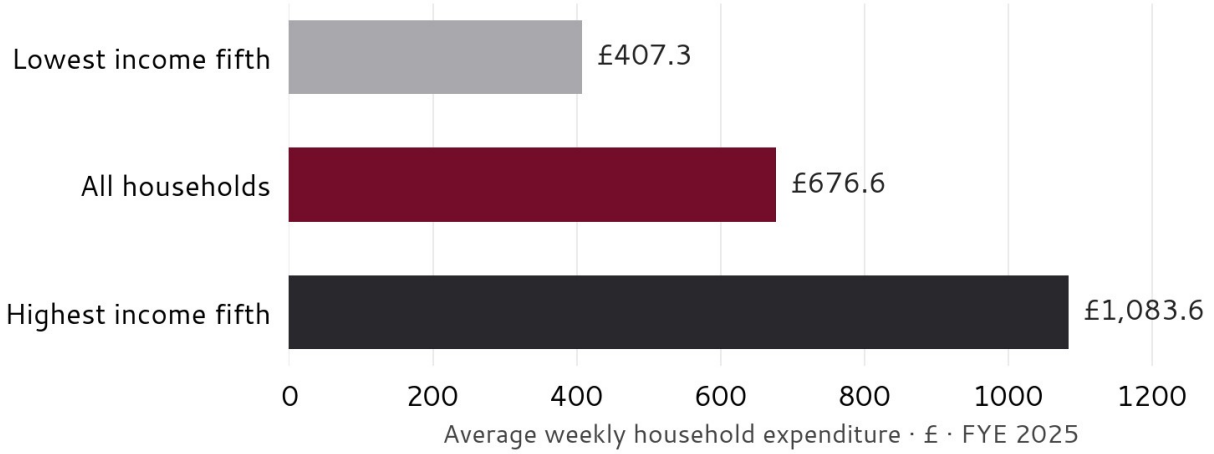
2FAST ANALYSIS Sales plans should distinguish unit volumes from pricing. Equipment demand may follow investment programmes even when aggregate consumer growth is modest.

HOUSEHOLDS AND PURCHASING POWER

A broad market with distinct spending segments

Population scale, household structure and income distribution shape both product positioning and channel economics.

29.0m	£39,200	29.5%
Households · 2025 [7]	Median disposable income · FYE 2025 [8]	One-person households · 2025 [7]



Source: ONS Family Spending [9]. UK, April 2024–March 2025, current £ per household per week. Income quintile groups; average spending is not an income measure.

The median equivalised household disposable income was £39,200 in the year ending March 2025, up 3.5% in real terms. Equivalisation adjusts for household size and composition. It is therefore unsuitable as a direct estimate of the cash budget of every household. [8]

Average weekly expenditure was £676.60. Housing, fuel and power accounted for £118.40 and transport £96.40. Spending in the highest income fifth was around 2.7 times that of the lowest fifth, illustrating the need to separate value, mainstream and premium propositions. These survey measures describe the 2024/25 period, not current retail prices. [9]

Almost half of people living alone were aged 65 or over. Smaller household formats, convenient delivery and accessible services have an identifiable demographic context, although demand for a specific product still requires customer evidence. [7]

2FAST ANALYSIS Segment by disposable budget, household type and distribution channel. A national average can obscure the customer's practical spending capacity.

PEOPLE AND SKILLS

A deep labour market with different local constraints

Employment, pay and recruitment indicators provide complementary signals rather than one definitive measure of hiring conditions.

75.3%
Employment rate ages 16–64 [10]

4.7%
Unemployment rate ages 16+ [10]

691,000
Vacancies July–September [10]

Indicator	Latest observation	Meaning for planning
Employment and unemployment	June–August 2026 · UK	Survey-based national labour availability; not an occupational recruitment forecast.
PAYE employees	30.3 million · September 2026 provisional · UK	Administrative payroll signal; early estimates are revised.
Regular earnings growth	3.7% nominal · June–August 2026 · GB	An average-pay growth measure; excludes Northern Ireland.
Median full-time weekly earnings	£811.20 · April 2026 · UK	ASHE gross employee pay; excludes employer on-costs.

Sources: ONS labour market overview and ASHE [10–11]. Periods and geographical scope differ deliberately.

Skills are linked to clusters

Research, regulated professional work and advanced production draw on different qualifications and experience. Scottish investment bodies identify energy, financial technology and life sciences capabilities; Invest Northern Ireland identifies cyber, financial technology and engineering specialisms. Welsh evidence links semiconductor activity to universities and production facilities. These are useful locations for skills investigation, not guarantees of available hires. [50–52]

Quality of the labour evidence

ONS moved Labour Force Survey and Annual Population Survey outputs from "official statistics in development" to "official statistics" in August 2026. This is not equivalent to reaccreditation. Survey uncertainty and response limitations still matter, particularly for small areas and subgroups. PAYE, vacancies and earnings should be used alongside the LFS; differences in coverage mean they need not move identically. [10]

2FAST ANALYSIS Validate occupations, shift patterns, commuting areas and training capacity before using regional wage averages in a site model.

ECONOMIC STRUCTURE

Services and industry reinforce each other

Services account for around four fifths of UK output, but many of their customers and applications sit in industrial value chains. [3]

Economic activity	Connection to business demand	Evidence and interpretation
Financial and professional services	Financing, insurance, legal work, accounting, engineering and cross-border operations	Financial and other business services are major export categories. [13]
Information and communications	Software, data infrastructure, digital products and industrial systems	A material contributor to 2025 output growth in the national accounts. [3]
Manufacturing and production	Transport equipment, pharmaceuticals, power systems and specialised components	Advanced goods exports coexist with substantial imported inputs and equipment. [13]
Construction and property services	Commercial facilities, infrastructure and housing	Construction expanded in 2025, but the latest three-month output measure was weaker. [3–4]
Public and household services	Health, education and everyday consumption	Demand depends on household budgets, commissioning and public spending priorities. [2, 8–9, 30]

In the 2025 national accounts, services output grew by 1.2%, production by 0.4% and construction by 0.6%. Information and communication contributed 0.27 percentage points to overall growth, while human health and social work contributed 0.26 points. These are growth contributions, not shares of GDP. Production includes activities beyond manufacturing, so its growth rate should not be presented as a manufacturing-only result. [3]

Why the links matter

An aerospace or life sciences product combines research, intellectual property, certification, software, testing, financing and distribution. Some of this activity is counted in services even when it supports a manufactured export. Conversely, a service exporter can depend on imported computing equipment or specialised instruments. A sector label alone does not reveal the full customer network.

Financial services access is activity-specific. Firms considering regulated activities must determine whether FCA authorisation, registration or an exemption applies. A corporate registration or distribution agreement does not itself confer regulatory permission. [57]

2FAST ANALYSIS For industrial entrants, specialist services can be a route to customers and a necessary part of the delivery model.

DIGITAL AND CREATIVE ECONOMY

Technology demand extends beyond technology companies

AI, software and creative capabilities intersect with finance, health, manufacturing and consumer-facing businesses.

Indicator	Published estimate	Definition
AI-related revenue	£33.6 billion · 2025	Attributed AI activity, not the entire turnover of every identified company.
AI-related employment	About 130,400 · 2025	Modelled sector estimate; not a count of vacancies.
AI businesses identified	10,488 · 2025	Study coverage expanded; annual changes include identification effects.
Creative industries GVA	£145.8 billion · 2024 provisional	Economic value added; not revenue and not additive to overlapping digital estimates.

Sources: AI sector study [19] and DCMS economic estimates [20]. UK; distinct methodologies and periods.

The AI study identifies rapid expansion in attributed activity, but it also records improved coverage and changes in how firms describe their products. The most defensible commercial conclusion is that the UK has a substantial supplier and adopter ecosystem; the headline growth rate is not a forecast of spending available to a new entrant. [19]

Where a proposition can be tested

Industrial data integration, workflow automation, customer service, compliance tooling and creative production support are applications worth examining. Buyers need reliable integration, measurable performance and control over sensitive data. An implementation partner or a paid pilot can establish the use case before a larger local commitment. This is 2FAST analysis, not evidence of a live procurement.

The ICO's AI guidance addresses lawful, fair and transparent processing of personal data. It is under review following changes in the Data (Use and Access) Act. Product design therefore needs current legal interpretation, appropriate data rights and sector-specific requirements rather than reliance on a generic "AI compliant" label. [58]

2FAST ANALYSIS Select a narrow workflow and demonstrate the improvement against the buyer's existing process, including the cost of integration and ongoing support.

LIFE SCIENCES AND HEALTH TECHNOLOGY

A research-intensive ecosystem with demanding routes to adoption

The opportunity set includes research tools, manufacturing inputs, diagnostics, devices and specialist services.

£125.8bn	306,700	8,800
Sector turnover · 2024/25 [21]	Sector employment · 2024/25 [21]	Associated sites · 2024/25 [21]

The Office for Life Sciences identifies biopharmaceuticals and medical technology as the two main subsectors. Biopharmaceuticals generated about 65% of turnover, while medical technology accounted for 52% of employment. A quarter of companies reported manufacturing as their primary activity. These company-based statistics are not equivalent to national accounts GVA. [21]

Market route	Relevant customer groups	Key qualification
Research tools and laboratory services	Universities, research institutes, pharmaceutical and biotechnology businesses	Technical validation, reproducibility, service capability and purchasing arrangements.
Manufacturing inputs and equipment	Drug and device manufacturers and their qualified suppliers	Quality systems, traceability, change control and reliable lead times.
Medical devices and diagnostics	Healthcare providers, distributors and procurement organisations	Device classification, conformity assessment, registration and evidence for adoption.

Cambridge's Discovery Centre is an example of research infrastructure integrated with a university and hospital environment. Regional sector statistics also show activity beyond the South East, including the North West and Northern Ireland. Registered-address employment is not the same as the physical location of every laboratory or factory. [21, 54]

On 21 October 2026, the government confirmed a policy of indefinite recognition of CE-marked devices in Great Britain. Implementation and device-specific requirements must still be checked. MHRA registration, the applicable responsible-person arrangements and post-market obligations remain relevant; Northern Ireland has a separate EU-based device framework. [41–42]

The latest sector release revised the previous year's employment and turnover down by 13% following dataset improvements. Older headline totals should not be joined to the new series as if they were comparable. [21]

2FAST ANALYSIS For research supply and medtech, technical acceptance and procurement evidence are stronger entry signals than sector turnover alone.

ADVANCED MANUFACTURING

Specialisation creates industrial entry points

Aerospace, automotive, pharmaceuticals and power engineering connect production facilities to international supply chains.

Selected UK goods exports	2025 value	Commercial context
Mechanical power generators intermediate	£45.7bn	Engine and power-system value chains; product and end-use definitions matter.
Medicinal and pharmaceutical products	£44.1bn	Research, production, quality assurance and specialist distribution.
Cars	£28.9bn	Vehicle platforms, components, electrification and aftersales.
Aircraft	£13.1bn	Airframes, wings, systems, qualified suppliers and maintenance.
Scientific instruments	£11.9bn	Measurement, testing and research applications.

Source: DBT core statistics using ONS [13]. UK goods exports, 2025, current £ billion, balance of payments basis. Selected categories are not the whole manufacturing sector.

Airbus is converting its former A380 wing facility at Broughton in Wales into an A321 production line. In September 2026 it reported the first wing under way, with all jigs expected to be operational by year end. This demonstrates an industrial upgrade in progress, rather than a completed capacity figure. [53]

Nissan began production of the next-generation LEAF at Sunderland in December 2025. A separate September 2026 announcement set out a planned £170 million investment for the Kicks e-POWER model. The two milestones should not be combined into a single operating-project claim. [55, 60]

Supplier requirements shape addressability

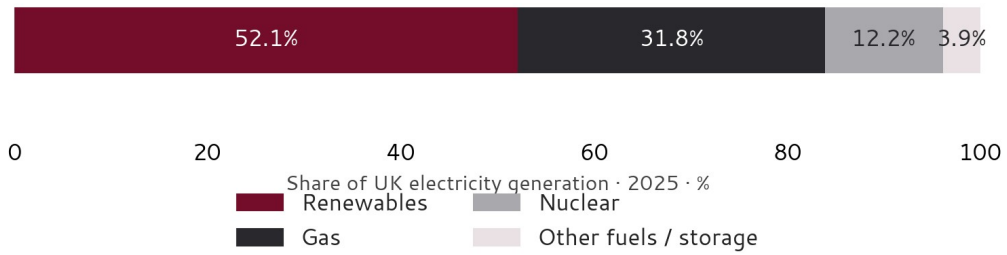
Precision tooling, inspection, factory software, energy efficiency and maintenance may fit these production systems. However, customer specifications, quality approval, incumbent supplier relationships and the ability to provide local support determine whether an entrant can compete. Product conformity and customs origin are separate requirements. [38, 40]

2FAST ANALYSIS Start with the manufacturing process and qualification pathway. A large export category does not establish an accessible purchasing requirement.

ENERGY SYSTEM

An expanding low-carbon base still needs system investment

Generation, networks, storage and demand efficiency are linked but have different procurement and financing models.



Source: DESNZ DUKES 2026 [24]. UK generation, calendar 2025. Other fuels/storage is the residual 100 − 52.1 − 31.8 − 12.2 = 3.9%. Shares are rounded.

Renewables supplied 52.1% of UK electricity generation in 2025. Wind accounted for 29.5% of the total and gas for 31.8%. Nuclear output contributed 12.2%, bringing low-carbon generation to 64.3%. These are electricity-generation shares, not shares of all UK energy use. Overall energy import dependency was 43.3%. [24]

Whitelee wind farm, East Ayrshire, Scotland. Thomas Nugent / Geograph, CC BY-SA 2.0. Photograph dated 21 April 2022; illustrative, not evidence of 2026 project status. [62]

Equipment, installation, grid connections and maintenance belong to different stages of a project. The business case for a supplier depends on an identified procurement package, technical standards, installation capacity and customer financing. Grid access and connection dates should be confirmed for both energy projects and electricity-intensive factories.

The British Industrial Competitiveness Scheme has an application window open at the data cutoff, but proposed benefits begin in 2027 and apply only to eligible Great Britain businesses. It is not a current universal reduction in industrial electricity bills. [47]

2FAST ANALYSIS Study grid and efficiency demand alongside generation. Use contracted prices and delivery schedules in project economics.

FOOD AND CONSUMER SUPPLY

Import demand supports a selective sourcing case

Food, feed and drink trade reveals an established requirement for external supply, alongside strong domestic production.

£67.8bn	£25.7bn	£42.1bn
Imports · 2025 [26]	Exports · 2025 [26]	Derived trade deficit [26]

Defra's updated customs-based figures show food, feed and drink imports increasing by 6% in current prices in 2025, and by about 5% in real terms. Export value increased by 5%, while real exports fell by 0.8%. The difference illustrates why price changes should be separated from physical market expansion. These customs statistics must not be added directly to the balance-of-payments tables elsewhere in this report. [26]

Potential proposition	Likely customer types	Evidence needed before entry
Ingredients and food manufacturing inputs	Food processors, ingredient distributors and contract manufacturers	Technical specification, sample approval, continuity of supply and delivered cost.
Differentiated packaged food	Specialist importers, retailers and food-service distributors	Consumer fit, label compliance, channel margin and repeat-purchase evidence.
Packaging and process efficiency	Manufacturers, co-packers and distribution operators	Line compatibility, waste reduction, measurable savings and service support.
Temperature-controlled logistics	Importers, wholesalers and healthcare or food operators	Lane demand, utilisation, monitoring, certification and liability allocation.

2FAST screening framework, informed by customs trade and household expenditure [9, 26]. Customer types are not named buyers or confirmed leads.

Products of animal origin require commodity-specific checks on permission to import, risk category, documentation and border procedures. Medium-risk imports generally require health certification; low-risk products have different documentation requirements. Composite products need their own classification. [59]

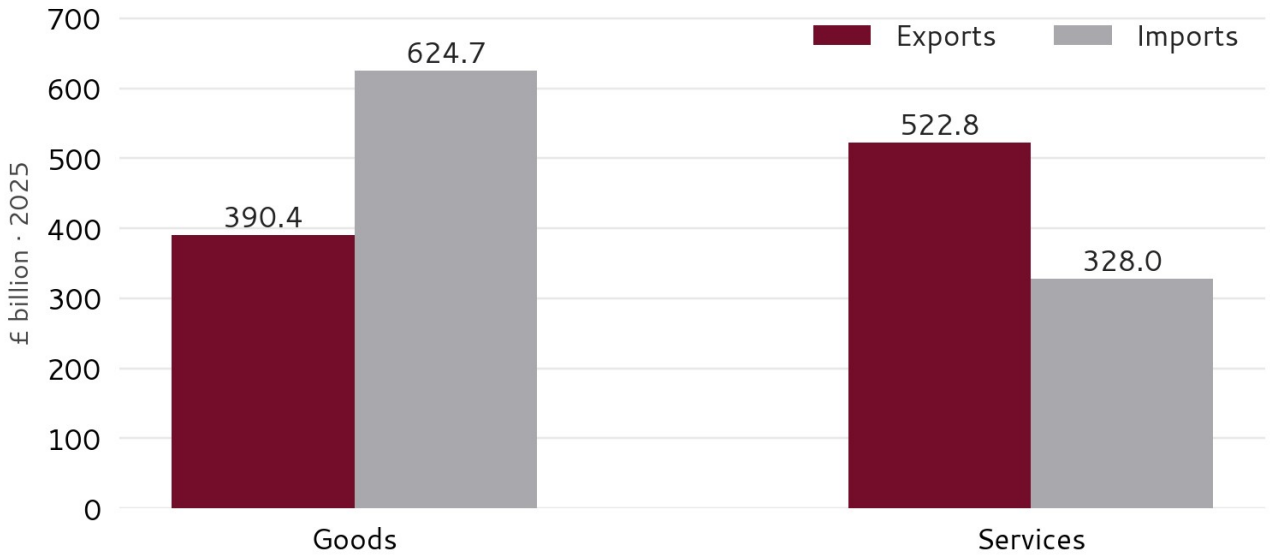
The planned UK–EU sanitary and phytosanitary agreement is expected to change parts of this environment, but it was not in force at the cutoff. Existing controls remain the basis for shipment planning. [43]

2FAST ANALYSIS The strongest case combines product differentiation with reliable import compliance, shelf life and distributor economics.

EXTERNAL TRADE

Services offset much of the goods deficit

The UK is both a large importer and an exporter of internationally traded expertise.



Source: DBT core statistics using ONS [13]. UK, 2025, current £ billion, balance of payments basis including precious metals. Exports and imports are gross flows.

Trade balance	2025	Calculation
Goods	−£234.3bn	390.4 − 624.7
Services	+£194.8bn	522.8 − 328.0
Goods and services	−£39.5bn	913.2 − 952.7

2FAST arithmetic from published values [13]. Rounding may affect totals in other source tables.

Services represented 57.2% of total export value in 2025, calculated from the same trade table. The composition matters for market development: UK exporters can be customers for international technology, industrial inputs and professional support, as well as competitors in third markets.

Separate the latest rolling period

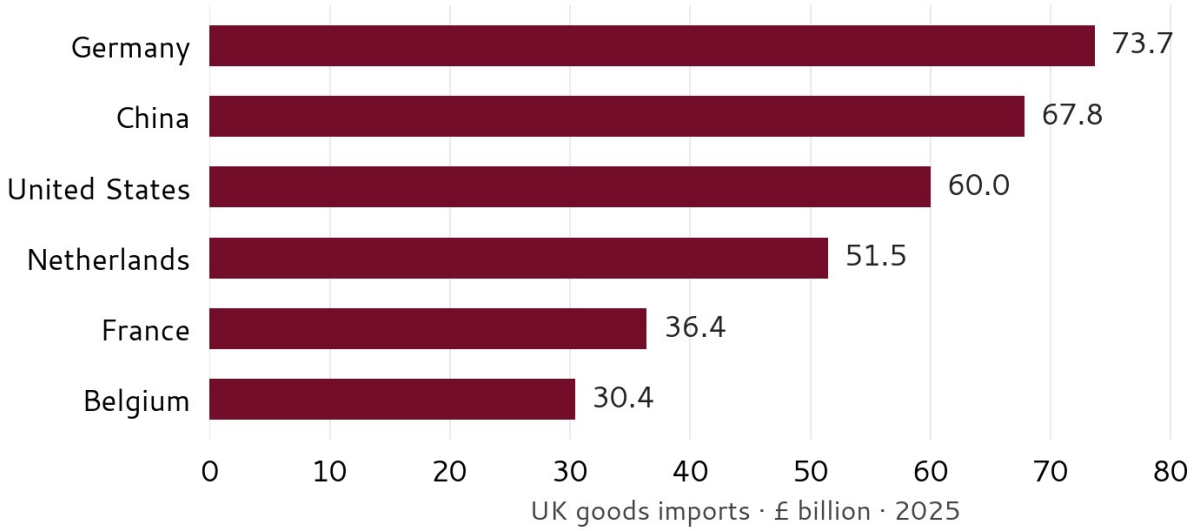
In the twelve months to August 2026, exports totalled £949.4 billion and imports £998.2 billion. This overlapping rolling period is not calendar 2026 or January–August trade. Changes in precious metals and other volatile categories can affect headline values, so a product decision should use the relevant commodity series. [14]

2FAST ANALYSIS An import requirement can support a sourcing thesis, but supplier selection depends on specification, origin, reliability and the full landed cost.

GOODS MARKETS

Partners and products identify different routes to demand

European supply remains central, while the United States and China are also major goods sources.



Source: DBT core statistics using ONS [13]. UK goods imports by partner, 2025, current £ billion, balance of payments basis. Selected partners; not a total.

Selected imported goods	£bn in 2025
Cars	47.0
Mechanical power generators intermediate	32.6
Medicinal and pharmaceutical products	26.3
Refined oil	23.0
Telecoms and sound equipment capital	22.6

Source: [13]. Published product groups; a category is not an addressable-market estimate for a particular supplier.

EU countries supplied 51.4% of UK goods imports and received 46.6% of goods exports in 2025. The scale of those relationships supports established transport and distribution networks, but preferential tariffs still depend on origin. A good shipped through an EU warehouse does not automatically become EU-originating. [13, 38]

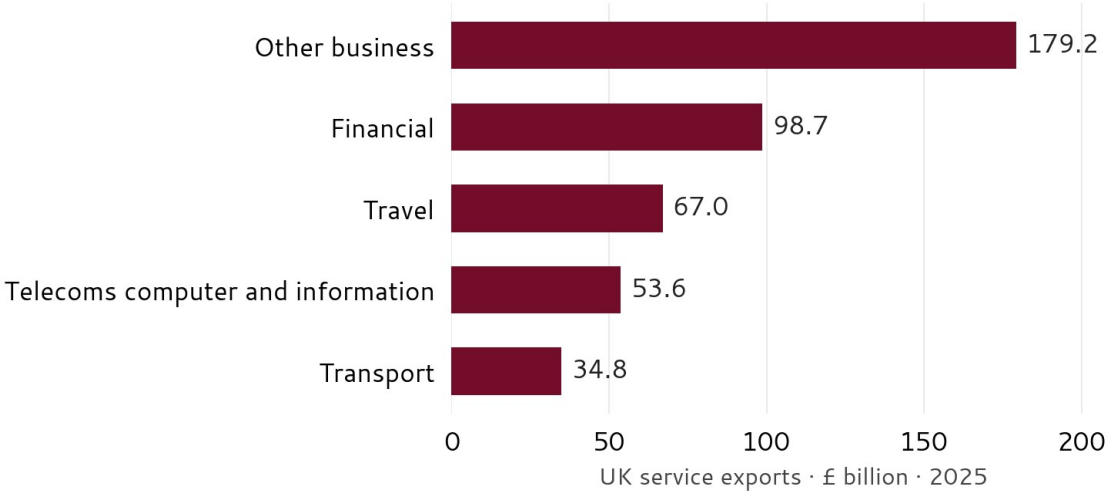
Commodity classification is the practical starting point. It determines the relevant tariff, potential origin rule and many product requirements. After that, the entrant can compare distributor access, direct industrial supply and local assembly against a consistent delivered-cost model. [38–40]

2FAST ANALYSIS Screen at product-code level and validate the buyer specification. Broad import categories include diverse products and established competitors.

INTERNATIONAL SERVICES

Export strength reaches well beyond finance

Business expertise, travel, digital services and transport are all part of the external earnings base.



Source: DBT core statistics using ONS [13]. UK service exports, 2025, current £ billion, balance of payments basis. Selected categories.

Other business services include a wide range of professional, technical and business activities. Financial services form another large export category, while telecommunications, computer and information services connect digital production with cross-border customers. The categories describe traded services, not the full domestic revenue of their industries. [13]

Entry route	Useful when	Main qualification
Specialist subcontracting	An incumbent provider needs defined technical or regional capability	Delivery evidence, security standards and a clear division of liability.
Local commercial presence	Buyers require account management, contracting or regulated capabilities in the UK	Permission, staffing, tax substance and service continuity.
Partnership with an established provider	Customer access and complementary expertise are central	Partner incentives, rights, data access and measurable service commitments.

2FAST analysis. Commercial structure must be tested against the activity and customer.

Regulated financial activities require a separate permissions analysis. Data-intensive services must also consider current data protection obligations and contractual controls, including the responsibilities of processors and controllers. Corporate presence alone does not resolve either requirement. [57–58]

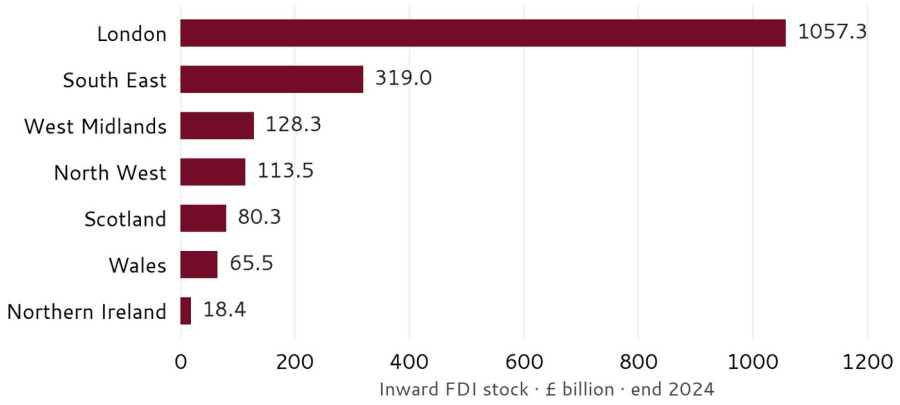
2FAST ANALYSIS Compete on a demonstrable capability, sector knowledge or delivery advantage. Market breadth also implies sophisticated customers and strong incumbents.

FOREIGN DIRECT INVESTMENT

A substantial installed base with uneven flows

Investment stocks, annual financial flows and recorded projects describe different aspects of inward investment.

£2.13tn	£13.4bn	£1.86tn
Inward stock · end 2024 [15]	Net inward flow · 2024 [15]	Outward stock · end 2024 [15]



Sources: ONS subnational FDI and DBT core statistics [13, 17]. Selected UK regions, inward FDI stock at end 2024, current £ billion. Regional allocations are not project counts.

Inward stock fell by £75.4 billion from 2023, while the inward net flow was lower by £27.9 billion. ONS identifies higher dividend payments as contributing to negative reinvested earnings. Financial flows can therefore weaken without representing an equivalent fall in new factory construction. Stock values also respond to valuation and exchange-rate changes. [15]

The United States was the largest immediate investor location, with £640.3 billion of inward stock. The Netherlands and Luxembourg were also major counterparties. Immediate ownership does not necessarily identify the ultimate controlling country; Jersey is an external Crown Dependency, not part of the UK. [13]

Selected sector	Projects 2025/26	New jobs
Software and computer services	197	14,575
Financial services	121	4,513
Environment infrastructure and transportation	117	18,922

DBT recorded inward-investment projects [16]. These are sector project measures, not sector FDI financial stocks, and are not added to ONS flows.

2FAST ANALYSIS The installed investor base indicates an established operating ecosystem. Site and sector selection still require project-specific commercial evidence.

OPERATING ECONOMICS

Evaluate the full cost of delivery

Pay, energy, finance and premises affect both the operating budget and the location decision.

Cost signal	Latest measure	Use and limitation
Employee earnings	£811.20 median full-time weekly pay · April 2026 · UK	Gross pay from ASHE; not total employer labour cost. [11]
Employer National Insurance	15% standard rate above £5,000 annual secondary threshold · 2026/27	Eligibility, reliefs, categories and Employment Allowance can change the outcome. [34]
National Living Wage	£12.71 per hour · ages 21+ · from April 2026	Legal floor; not a skilled-occupation pay benchmark. [35]
Non-domestic energy	Electricity 24.5p/kWh; gas 5.3p/kWh · Q2 2026 · UK	Average prices including Climate Change Levy; site contracts and consumption bands differ. [25]
Bank Rate	3.75% · September 2026 decision	A policy rate; commercial credit adds margins, fees and borrower-specific terms. [29]

A transparent labour-cost illustration

For an assumed £40,000 annual salary, standard employer NIC before reliefs is (£40,000 − £5,000) × 15% = £5,250. Salary plus that NIC is £45,250. This illustration excludes pensions, benefits, recruitment, training, leave cover and any available allowance. It is an assumption-based calculation, not an observed sector cost. [34]

Premises and productivity belong in the same model

Residential private rent averaged £1,406 per month in September 2026. This can inform the employee catchment and retention discussion but is not a commercial lease quotation. Industrial and office sites require local rent, business rates, fit-out, power capacity and connection-date evidence. [56]

OBR's October outlook links medium-term growth to productivity and labour supply. For an individual business, practical productivity improvements may involve equipment utilisation, process redesign, management and skills; the investment case needs its own measurable baseline. [30]

2FAST ANALYSIS Compare total annual cost and dependable output at each candidate site, including utilities, commuting and customer service requirements.

ESTABLISHMENT AND TAX

A clear corporate route with activity-specific obligations

Choose the commercial operating model first, then align incorporation, tax, permissions and staffing.

Requirement	Position at the data cutoff	Practical implication
Corporate identity	Mandatory Companies House identity verification began 18 November 2025; existing roles have transition deadlines. [36]	Confirm directors, persons with significant control, registered office and filing responsibilities.
Corporation Tax	Ordinary main rate 25%; small profits rate 19%; £50,000 and £250,000 thresholds before relevant adjustments. [32]	Associated companies and accounting periods affect thresholds; intermediate profits can receive marginal relief.
VAT registration	Domestic taxable turnover threshold £90,000; non-established taxable persons can have no threshold. [33]	Assess place of supply, importer arrangements and registration before trading.
Capital investment	Full expensing applies to qualifying new main-rate plant and machinery for companies, with exclusions. [37]	An accounting purchase is not automatically eligible; model asset class and tax position.
Sector permissions	Financial services, medical devices and controlled food imports have distinct requirements. [41, 57, 59]	Incorporation does not substitute for the licence, registration or approval needed for the activity.

Distinguish current rules from announced changes

Budget 2026 announced an increase in the main-rate first-year allowance from 40% to 50% from January 2027, and a reduction in the writing-down allowance to 12% from April 2027. These are future changes at the report cutoff and do not replace the qualifying full-expensing regime. Investment timing should be assessed using the enacted rules and the specific asset. [31, 37]

Planning, environmental consent, premises use, employment, immigration and local operating permissions depend on the activity and location. A distributor, an office-based service company and a manufacturing site will have different establishment requirements. Obtain site-specific confirmation before committing capital.

2FAST ANALYSIS Create a responsibility matrix covering the legal entity, importer, employer, licence holder and aftersales provider before signing customer or property contracts.

CUSTOMS AND REGULATION

Great Britain and Northern Ireland need separate checks

The UK–EU relationship supports substantial trade, with rules that remain consequential for sourcing and distribution.

Route or rule	Current operating meaning
UK–EU preferential tariffs	Zero tariffs and quotas under the trade agreement depend on qualifying origin and a valid preference claim. Shipment location alone is insufficient. [38]
Imports into Great Britain	Determine commodity code, customs value, origin, EORI and declarations, then establish duty, VAT and product requirements. [39]
Product marking in Great Britain	CE recognition or UKCA requirements depend on the sector. The general manufactured-products position must not be applied indiscriminately to devices or other specific regimes. [40–42]
Great Britain to Northern Ireland	Windsor Framework arrangements and UKIMS can simplify eligible movements for final UK use. Commercial eligibility, data and destination requirements still matter. [44–45]
Northern Ireland product route	Relevant EU goods rules continue to apply. Where applicable, CE or CE with UKNI has a distinct role; UKCA alone is not the NI route. [40–41]
Food and sanitary controls	The planned UK–EU SPS agreement was not in force at cutoff; government guidance envisaged implementation in mid 2027. Existing commodity controls continue. [43, 59]

Practical sequence for a supplier

Define the product and its final destination before pricing. Confirm whether the importer, distributor or customer carries each compliance responsibility. Then test the origin calculation, customs documentation, marking, labels and any sector approvals against the actual shipment route. A GB warehouse serving both GB and Northern Ireland may need more than one process.

For EU-linked supply chains, keep commercial invoices, bills of materials and supplier origin evidence aligned. Preferential tariff treatment and product conformity are independent tests. Passing one does not establish the other. [38–40]

2FAST ANALYSIS Design the distribution model around the destination rules from the outset. Regulatory clarity can be a commercial service advantage.

INNOVATION AND PUBLIC PROGRAMMES

Research capacity supports commercial development

The useful distinction is between a strategic commitment, an accessible programme and a delivered project.

£79.4bn	£55.6bn	70.0%
UK R&D performed · 2024 [22]	Business R&D · 2024 [23]	Derived business share of R&D

Business-performed R&D is part of total R&D, not an amount to add to it. The measure records where research is performed; it should not be confused with government financing or a company's global research budget. Universities, public laboratories and specialist technology organisations provide further research capacity. [22–23]

Instrument or platform	Status at 1 November 2026	What to verify
Modern industrial strategy	Published ten-year framework covering eight growth sectors, with sector plans and implementation updates. [46]	The named programme, available budget, delivery body and application requirements.
Horizon Europe	UK association covers eligible calls in the 2024–2027 work programmes. [48]	Topic eligibility, consortium requirements, deadlines and any restricted calls.
Catapult centres	Established research and technology organisations in areas including medicines, energy, digital and manufacturing. [49]	Technical fit, facility access, fees, IP arrangements and any competition-specific funding.
British Industrial Competitiveness Scheme	Applications open 1 October–30 November 2026; benefits scheduled from 2027 for eligible GB businesses. [47]	Sector and electricity criteria, evidence, application deadline and implementation conditions.

Universities and research centres can support collaboration, testing and skills development, but access to facilities or public finance is not automatic. The commercialisation case should specify ownership of intellectual property, customer validation and the resources needed after a grant or pilot ends.

2FAST ANALYSIS Treat incentives as a tested component of a viable business case. Exclude unawarded funding from the base case.

ECONOMIC GEOGRAPHY

A network extending beyond London

Selected economic and logistics centres across all four nations.

Source: Natural Earth public-domain boundaries [63]; 2FAST selection of centres informed by [18, 21, 27, 50–55]. Locations are approximate; combined labels indicate paired clusters. Republic of Ireland is context only. Crown Dependencies are excluded from UK totals.

The map is a location guide, not a ranking or a route-capacity model. Scotland's northern islands and Northern Ireland are included in the UK outline. London Gateway and other Thames ports are represented by the London area; the port list is deliberately selective.

2FAST ANALYSIS Use customer proximity and technical fit to create the shortlist, then compare skills, property, utilities and transport at site level.

NATIONS AND CLUSTERS

Location choice should follow the value chain

Regional statistics establish scale; cluster evidence explains the type of activity worth investigating.

Nation	2024 nominal GDP	Selected economic specialisms
England	£2,472.1bn	London services; Oxford and Cambridge research; Midlands engineering; North West digital and life sciences; North East vehicles; Bristol aerospace.
Scotland	£218.8bn	Edinburgh financial and digital services; Glasgow engineering and research; Aberdeen energy capabilities.
Wales	£100.3bn	Broughton aerospace; South Wales compound semiconductors and university-linked engineering.
Northern Ireland	£67.7bn	Belfast cyber and financial technology; advanced manufacturing and life sciences capabilities.

GDP: ONS regional accounts [18], current prices, 2024 regional vintage. Cluster context: [21, 50–55, 60]. UK regional total also includes £25.1bn Extra-Regio; these figures are not reconciled to the newer Blue Book total.

Connect specialisation to an operating requirement

A research supplier may value proximity to laboratories and technical staff. A component producer may prioritise an industrial customer, qualified suppliers and reliable power. A distribution operation may instead depend on port access, motorway routes and the location of its customers. These requirements can point to different sites within the same region.

London's current-price GDP was £656.3 billion in the regional 2024 release, but economic activity is not confined to the capital. The South East, North West and Midlands form substantial regional economies, while devolved investment bodies describe distinct capabilities in Scotland, Wales and Northern Ireland. [18, 50–52]

Avoid false precision in local comparisons

ONS suppressed some ITL2 estimates in the latest regional release because of boundary-conversion issues; ITL1 estimates were unaffected. GDP per head also reflects commuting and should not be presented as household income. For city and site selection, confirm the relevant labour catchment and physical operating location. [18]

2FAST ANALYSIS A cluster shortlist is a starting hypothesis. Compare actual staffing, premises and infrastructure availability before selecting a location.

LOGISTICS AND CONNECTIVITY

Match the route to the commodity and customer

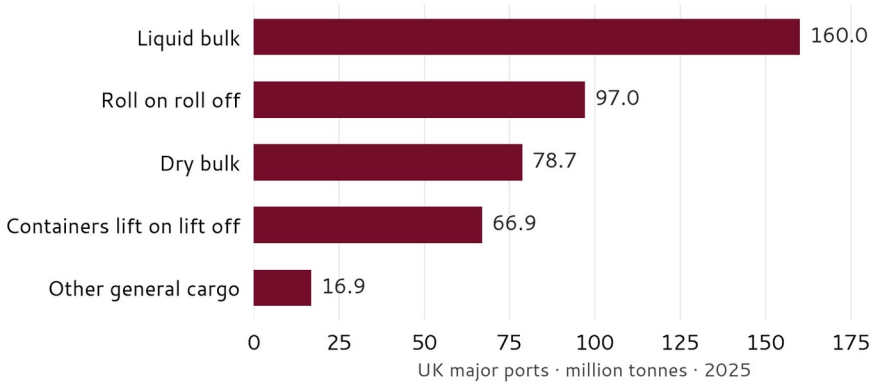
The UK's ports support bulk energy, industrial inputs, consumer goods and time-sensitive supply chains.

428.3m

Tonnes through all UK ports · 2025 [27]

66.9m

Container tonnes at major ports [28]



Source: DfT port freight statistics [28]. UK major ports, 2025, million tonnes. Major-port cargo groups do not equal the all-port headline. Containers are tonnage, not TEU.

Liquid bulk remained the largest major-port cargo group. Container tonnage increased by 10% in 2025, while roll-on/roll-off tonnage fell by 2%. Cargo type therefore gives a more useful operational signal than a single total-freight growth rate. [28]

Logistics requirement	Locations or networks to assess	Decision evidence
Containerised distribution	Thames and London Gateway, Felixstowe, Southampton and inland distribution sites	Sailing availability, inland cost, dwell time, customs service and final delivery distance.
Industrial and energy cargo	Humber and other bulk or project-cargo ports	Berth and lifting capability, storage, permits and customer connection.
High-value or time-sensitive supply	Air-freight routes and specialist road or cold-chain networks	Actual flight and lane capacity, handling standards and recovery plans.
Northern Ireland distribution	Belfast and Irish Sea connections	Destination rules, paperwork, service frequency and customer coverage.

2FAST route-screening framework. Network choices are illustrative, not verified capacity offers.

2FAST ANALYSIS Compare the complete delivery promise, including clearance and inland transport. The lowest port or freight charge need not give the lowest delivered cost.

REAL ECONOMY EXAMPLES

Projects show different stages of investment

Selected disclosures illustrate economic linkages. They do not imply procurement access or a relationship with 2FAST.

Company or facility	Verified position	Economic significance
Airbus Broughton · Wales	A321 wing-line conversion under way in September 2026; first wing started, with all jigs expected operational by year end. [53]	Advanced production combines tooling, engineering, skills and long-term aircraft supply chains.
AstraZeneca Discovery Centre · Cambridge, England	Research centre opened in 2021 within the Cambridge biomedical environment. [54]	An example of corporate research connected to universities, hospitals and specialist services.
Nissan Sunderland · England	New LEAF production began in December 2025. A further £170m Kicks e-POWER investment was announced in September 2026. [55, 60]	An operating vehicle programme and a separate planned programme illustrate different stages of industrial demand.
South Wales semiconductor cluster · Wales	Welsh Government identifies Vishay, KLA, CSconnected and university-linked research in the regional ecosystem. [51]	Design, compound semiconductor technologies, facilities and industrial research can reinforce one another.

Read announcements as milestones

A corporate announcement establishes what the company has disclosed at that date. It does not by itself establish completion, full production, the value of local procurement or the availability of supplier contracts. Those questions need subsequent evidence from the project owner or the responsible delivery body.

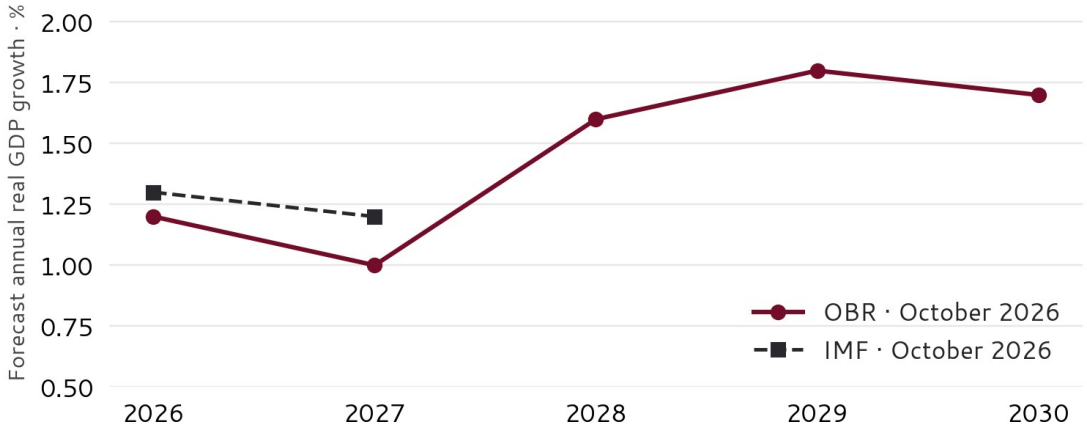
The examples span research infrastructure, production upgrades and planned investment. Their practical value is to identify the surrounding capabilities: testing, process equipment, industrial software, skills, maintenance and logistics. A supplier should then confirm which functions are procured locally and whether qualification is open.

2FAST ANALYSIS Use real projects to map value chains and possible customer types, then verify procurement status directly. No buyer commitment is inferred here.

MACROECONOMIC OUTLOOK

Published forecasts point to modest expansion

The latest OBR and IMF forecasts are separate views with different information sets and assumptions.



Sources: OBR October 2026 EFO [30] and IMF October 2026 WEO [6]. UK calendar-year real GDP growth, %. All chart values are forecasts. The OBR's historical base differs from the latest ONS outturn vintage.

The OBR expects growth of 1.2% in 2026 and 1.0% in 2027, followed by stronger growth later in its forecast. The IMF forecasts 1.3% and 1.2% for the first two years. The small difference should not be treated as a precise range of possible outcomes. [6, 30]

Factor	Potential support	Practical constraint
Investment and innovation	Research, digital adoption and industrial programmes can support capacity and efficiency.	Delivery, skills, funding and customer adoption determine the effect.
Household demand	A large household base supports diverse consumer markets.	Inflation and housing costs constrain discretionary spending.
Energy and external conditions	Domestic low-carbon generation can support longer-term system change.	Imported fuel prices, grid access and financing remain relevant.
Public finances	Public investment and procurement can sustain particular markets.	Debt service and fiscal choices limit the scope for general demand support.

2FAST analysis informed by [7–9, 12, 24, 29–31, 46]. These are business sensitivities, not quantified scenarios.

The September CPI rate was 3.5%, compared with CPIH at 3.6%. Bank Rate remained 3.75% after the September decision. Neither a return to target inflation nor lower borrowing costs should be assumed automatically. OBR forecasts public sector net debt of 95.5% of GDP in 2026/27; this is a fiscal-year forecast, not a current debt observation. [12, 29–30]

2FAST ANALYSIS Test demand, energy, financing and delivery assumptions separately. A viable base case should not depend on one favourable macroeconomic outcome.

COMMERCIAL PATHWAYS

Industrial and research markets to investigate

Each pathway is a testable commercial hypothesis, supported by sector evidence rather than a claim of confirmed orders.

Precision engineering and factory productivity

Demand evidence: aircraft, vehicle and power-equipment trade and disclosed production upgrades indicate established industrial systems. Products and services: inspection, tooling, automation, process software and maintenance. Customer types: manufacturers and qualified tier suppliers. Locations: Midlands, North East England, Bristol, Broughton and relevant Northern Ireland engineering clusters. [13, 52–53, 55, 60]

Entry: technical distributor, integrator or direct qualified supply. Requirements: conformity, customer quality approval, traceability and local support. Verify: the actual procurement package, approved-vendor route, capacity, incumbent competition and payment terms. A production expansion is not an invitation to supply.

Research tools and life sciences production support

Demand evidence: £125.8bn sector turnover and a large research and manufacturing base. Products and services: laboratory equipment, analytical tools, specialist consumables, validation and controlled logistics. Customer types: laboratories, drug and device manufacturers and research organisations. Locations: Cambridge, Oxford, London, the North West and established Scottish and Northern Irish clusters. [21–23, 50, 52, 54]

Entry: specialist distribution, service partnership or local technical team. Requirements: intended-use classification, quality systems and relevant MHRA obligations. Verify: tender eligibility, technical evidence, service response, reimbursement where relevant, and customer approval time. [41–42]

Energy networks and industrial efficiency

Demand evidence: a 52.1% renewable generation share alongside continuing gas dependence and measurable non-domestic energy costs. Products and services: monitoring, electrical equipment, maintenance, efficiency retrofits and project logistics. Customer types: energy operators, industrial users, engineering contractors and asset owners. Locations: Scottish energy clusters, Humber and industrial regions with a defined project pipeline. [24–25, 28, 50]

Entry: engineering partner, approved contractor or equipment distributor. Requirements: technical standards, site safety, grid and installation permissions. Verify: procurement status, project finance, connection dates, operating savings and warranty exposure.

2FAST ANALYSIS For all three pathways, commercial attractiveness depends on qualification, margins and delivery capability. Public programmes are additional evidence, not guaranteed revenue.

COMMERCIAL PATHWAYS

Services and consumer supply to investigate

The entry channel should match the buying process and the obligations attached to the product.

Enterprise digital and specialist business services

Demand evidence: large business-service exports and an expanding AI supplier ecosystem. Products and services: workflow integration, cybersecurity, industrial analytics and specialist operational support. Customer types: financial and professional firms, manufacturers and established service providers. Locations: London, Manchester and Leeds, Edinburgh and Glasgow, Belfast and customer-specific industrial clusters. [13, 19, 50, 52]

Entry: paid pilot, subcontracting or partnership with a local provider. Requirements: data protection, security, sector permissions where relevant and contractual accountability. Verify: data access, integration effort, procurement budget, competitor capability and a measurable improvement over the current process. [57–58]

Differentiated foods and manufacturing inputs

Demand evidence: £67.8bn of food, feed and drink imports in 2025 and distinct household spending segments. Products: ingredients, specialised packaged food and compatible packaging or processing inputs. Customer types: food manufacturers, importers, retailers and food-service distributors. Locations: buyer-led national distribution networks and relevant food-producing regions, including Scotland and Northern Ireland. [9, 26, 50, 52]

Entry: importer or distributor, private-label supply or direct industrial sourcing. Requirements: product safety, labelling, commodity-specific import controls and dependable shelf life. Verify: permitted origin, landed price, distributor margin, minimum order volumes and repeat demand. [38, 43, 59]

Specialist logistics and distribution support

Demand evidence: substantial goods imports and 428.3m tonnes of port freight in 2025. Services: customs coordination, traceability, warehouse technology, cold chain and industrial spare-parts distribution. Customer types: importers, manufacturers, laboratories and logistics operators. Locations: port-linked corridors, inland customer catchments and Northern Ireland routes. [13, 27–28]

Entry: partnership with an operator, a defined lane or a local fulfilment operation. Requirements: customs responsibilities, product handling and service-level commitments. Verify: contracted volume, facility capacity, utilisation, working capital, loss liability and the destination rules. [39, 44–45]

2FAST ANALYSIS These fields merit investigation. None should be described as a confirmed 2FAST opportunity until a real customer requirement and commercial terms are established.

FROM RESEARCH TO ENTRY

Build the evidence for a specific commercial decision

A staged approach makes the initial commitment proportionate to the information available.

Decision stage	Evidence to obtain	Practical output
Define the market	Product code or service activity, target use, customer problem and geography	A narrow segment definition with an explicit GB or NI route.
Validate demand	Customer discussions, technical specifications, buying process and competitor alternatives	A qualified requirement and a realistic procurement timetable.
Select the channel	Distributor coverage, partner capability, margin expectations and service obligations	A channel comparison and draft allocation of responsibilities.
Model delivery	Landed costs, duty and VAT treatment, staffing, premises, utilities and finance	A cash-flow model with transparent volume, price and cost assumptions.
Confirm compliance	Product approvals, registration, data rights, tax position and local permissions	A dated compliance matrix owned by the relevant parties.
Test and scale	Pilot performance, customer acceptance, repeat orders and operational reliability	Evidence-based decision on a local team, facility or larger commitment.

2FAST decision framework. No assumed buyer, contract, grant award or return is embedded in the sequence.

The location decision

Compare candidate locations using the same workload and service promise. Request actual premises and utility offers, check the recruitment catchment and confirm delivery times to customers. National averages should serve as reference points, not substitutes for quotations.

The investment decision

Separate existing demand from planned demand, and committed funding from announced support. Test lower utilisation, slower customer approval and different input prices without presenting those tests as forecasts. Identify which uncertainty can be resolved through a small commercial trial before a larger investment.

2FAST ANALYSIS The objective is a reviewable business case with traceable assumptions, a workable operating model and evidence of customer acceptance.

METHODOLOGY AND CREDITS

Definitions and limits behind the analysis

The report combines primary statistics, regulatory guidance and selected first-party disclosures.

Measure	Treatment in this report
GDP and GVA	GDP includes taxes less subsidies on products; GVA describes sector value added. Company turnover and trade values are separate concepts.
Prices and growth	Current-price levels are nominal. Real growth removes price changes. Quarterly GDP is seasonally adjusted; published annual and survey figures retain source definitions.
Trade	ONS balance-of-payments goods and services are distinguished from HMRC-derived customs food trade. Gross imports are not equivalent to an accessible sales market.
Investment	FDI stocks, net financial flows and recorded projects are separate. Immediate investor location may differ from ultimate ownership.
Geography and vintages	UK, GB and nation coverage are labelled. Regional accounts and forecast historical bases are not forced to reconcile with newer national totals.
Calculations	Balances equal exports minus imports; shares use matching denominators. PPP index = country GDP at PPP / UK GDP at PPP × 100. Workbook formulas expose derived values.

Publication lags are material: annual FDI is 2024; regional GDP and R&D are 2024; national trade and GDP are 2025. Household surveys and small-area labour estimates carry sampling uncertainty. Life sciences and AI estimates have coverage and methodology effects. Some ITL2 regional outputs were suppressed. These limitations constrain precision but do not remove the usefulness of the broader evidence. [10, 15, 18–23]

Image and map credits

Cover: "Canary Wharf skyline from Greenwich Park", Matt Brown, 1 May 2024, via Wikimedia Commons, CC BY 2.0; cropped. Energy page: "Whitelee wind farm from the air", Thomas Nugent / Geograph, 21 April 2022, CC BY-SA 2.0; resized without substantive alteration. Licence and original-file links are in sources [61–62]. No photographer endorsement is implied.

Map boundaries: Natural Earth, public domain [63]. Economic-centre selection and chart design: 2FAST. Source identifiers in brackets link to the register on pages 31–34; source URLs and access dates are retained in the data workbook.

Data cutoff: 1 November 2026. Figures are rounded for readability; calculations use the displayed source precision unless otherwise stated. Commercial pathways are areas for further investigation, not promises of returns or evidence of awarded business.

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2FAST — MARKET DEVELOPMENT

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