

## Briefing Paper

# Trade, Trade Agreements and Tariffs and the Impact on Health, Well-being and Equity in Wales



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## Public Health Wales (PHW) is the public health agency for Wales.

It is a public body with a remit for promoting and protecting public health and well-being. It provides independent public health advice. Its Long-Term Strategy focuses on 6 priority areas including action on:

- Influencing the wider determinants of health
- Promoting mental and social well-being
- Promoting healthy behaviours
- Supporting the development of a sustainable health and care system focused on prevention and early intervention
- Delivering excellent public health services to protect the public and maximise population health outcomes
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# 1. Introduction

This briefing paper discusses the **potential health, well-being and equity impacts of trade tariffs on the Welsh population**. It is aimed at stakeholders in Wales working in the areas of trade, public health and health services to support them to better understand the potential impacts that trade tariffs can have on population health.

It begins with a brief introduction to trade agreements and to tariff and non-tariff barriers to trade. It then outlines the most recent trade deals the United Kingdom (UK) has signed up to before discussing how tariffs can affect population health, well-being and equity in Wales. It concludes with some options on how health and well-being can be better considered in trade agreements and identifying the impacts of tariffs. Finally, it presents two case study examples of how trade can impact the people and economy in Wales.

Trade agreement negotiation is a reserved matter for the UK Government, but Wales and the other devolved nations have their own trade policies. **Negotiating trade agreements is a complex, dynamic and unpredictable process and readers should note that some of the contents of this paper may quickly be superseded. Therefore, this presents a snapshot in time in late 2025.**





## 2. Trade agreements, tariffs (and non-tariff barriers)

Trade agreements between two or more countries can reduce restrictions on trade in goods and services and make buying and selling between countries easier and cheaper. Some, like the Trade and Cooperation Agreement (TCA) which was negotiated when the UK left the European Union (EU), are tariff-free. However, some trade agreements include tariffs (or taxes) ([Employment Law Solicitors, 2025](#); [Kane et al., 2025](#)) as well as non-tariff barriers (such as requirements for goods to be inspected) ([Institute for Government, 2017](#)). Tariffs can apply to UK goods **exported** overseas or overseas goods **imported** into the UK.

## 3. Determinants of health

**Trade is a key determinant of health and well-being** and trade agreements that include tariffs can have a range of impacts on **health and well-being**. These impacts can range from the wider economy to income levels, employment, healthcare and food ([Petchey and Cresswell, 2021](#)). Collectively, these factors are known as the **wider determinants of health** and their **effects can vary across populations** ([Dahlgren and Whitehead, 1991](#); [Silva and Petchey, 2023](#); [World Health Organization, 2024](#)). Table 1 ([can be found in the appendix](#)) (adapted from the [Faculty of Public Health Health Knowledge, n.d.](#); [Green et al., 2023](#)) demonstrates that these impacts can be **positive** but there can also be unintended **negative** impacts ([Green et al., 2024](#); [Barlow et al., 2022](#); [Petchey and Cresswell, 2021](#); [Cyrus, 2018](#)).



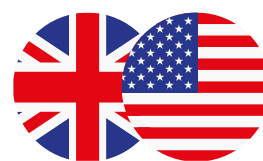
## 4. Current UK trade agreements

As an independent trading nation, the UK now has 39 trade agreements in place with 73 partners. Agreements are in force for 72 partners ([UK Government, 2025a](#)). The following section provides an overview of some of these agreements and some of the trade tariff provisions included in them. Although the UK-EU agreement does not include tariffs it is included here for comparison purposes.



**39 trade agreements in place with 73 partners**

### 4.1 Economic Prosperity Deal between the UK and the United States (US)



In May 2025, the UK signed a trade agreement with the US ([UK Government, 2025b](#)). The agreement currently covers goods although negotiations are continuing for services ([Jozepa and Webb, 2025](#)). Although not officially a trade agreement, the '**Economic Prosperity Deal (EPD)**', sometimes known as the UK-US trade deal, is a non-binding memorandum of understanding between the two nations ([Hanson, 2025](#)).

Under the agreement there is a **10% tariff on all UK goods exported to the US** ([Lester, 2025](#)). However, since the tariffs were first announced **some have been either reduced or removed** such as car export tariffs that will reduce from 27.5% to 10% on the first 100,000 UK cars exported to the US (almost the total the UK exported last year); steel industry tariffs have been reduced to 25%, lower than the 50% imposed on every other importer to the US ([British Chambers of Commerce, 2025](#)); and 10% tariffs on aerospace goods have been removed ([UK Government, 2025c](#)). The EPD also states that the UK will have preferential treatment on pharmaceutical tariffs once agreed (the UK is the second largest exporter to the US) ([Inge and Hug, 2025](#)). In return, the UK Government will remove a 20% tariff within a quota of 1,000 metric tons on US beef and will open a duty-free quota of 13,000 metric tons on US beef. In addition, the UK will also grant a duty-free quota of 1.4 billion litres for US ethanol. In exchange, the US will reallocate to the UK 13,000 metric tons of its existing "Other Countries" tariff rate quota for beef ([Jozepa and Webb, 2025](#)). Separately, the agreement states there will be no weakening of UK food standards for imports ([UK Government, 2025b](#)).



The EDP is expected to have little or no effect on UK Gross Domestic Product ([National Institute of Economic and Social Research \(NIESR\), 2025](#)). Nevertheless, the US is an important market for Wales. Trade in goods between Wales and the US in 2024 was valued at £6.4 billion ([Welsh Government, 2025a](#)). Around 1,066 Welsh business exported goods to the US during this time and a further 1,220 businesses imported. In 2023, the US was Wales's highest value trading partner by country with the biggest export being machinery and transport equipment (accounting for 5.3% of Wales's exports) while 8.1% of Wales's imports came from the US ([Senedd Research, 2025](#)).

## 4.2 UK-India Comprehensive Economic and Trade Agreement (CETA)



In May 2025, the UK also agreed a Free Trade Agreement (FTA) with the Republic of India for goods and services. Under the **Comprehensive Economic and Trade Agreement (CETA)**, **India's previous average tariff on UK products will drop from 15% to 3%** ([UK Government 2025d](#)). The agreement reduces 90% of tariff lines between the two countries with a further agreement that 85% of these will become tariff-free within 10 years ([UK Government, 2025d](#)).

**Tariffs will be reduced on key UK exports** including Scotch whisky and gin (reduced immediately from 150% to 75% and then dropped even further to 40% over the next ten years); other goods with reduced tariffs include cosmetics, aerospace, lamb, medical devices, salmon, electrical machinery, soft drinks, chocolate and biscuits. Reduced tariffs on goods imported to the UK from India include clothes, footwear and food products ([UK Government, 2025d](#)). Further details of the agreement are still to be announced.

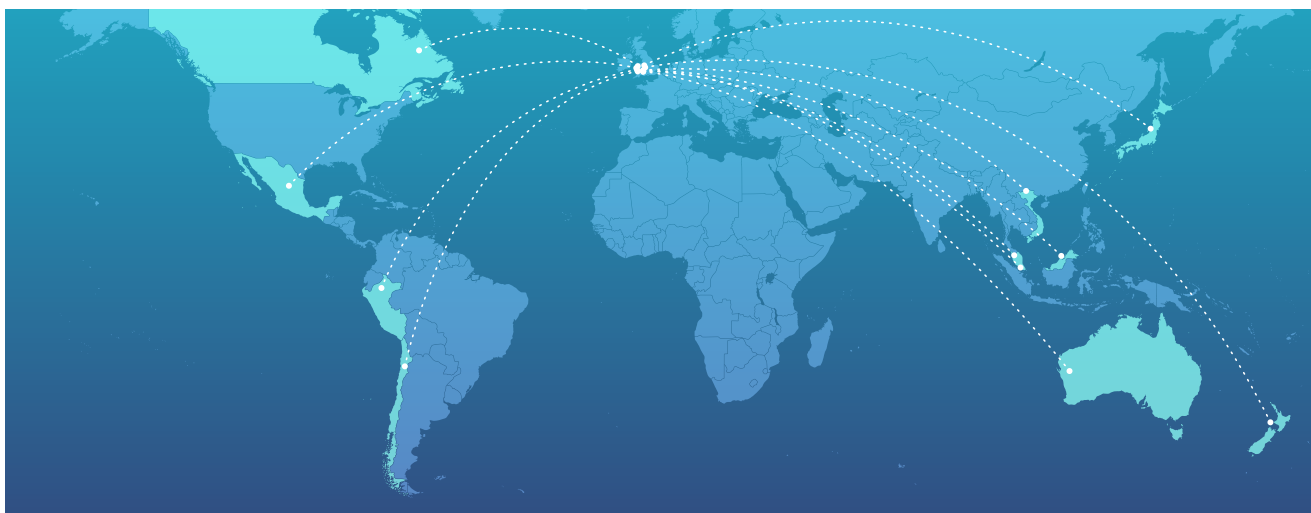


The UK Government ([2025d](#)) says it expects the deal to increase bilateral trade by £25.5 billion, UK GDP by £4.8 billion and wages by £2.2 billion each year in the long run.

India represents an important market for Wales. In 2024 around 256 Welsh businesses exported goods to India and 389 businesses imported goods. The overall goods trade between India and Wales was valued at £762.8 million, with services trade estimated at £373 million in 2022 ([Welsh Government, 2025b](#)).

### 4.3 Comprehensive and Progressive Trans-Pacific Partnership (CPTPP) Agreement

In December 2024, the UK joined the **Comprehensive and Progressive Agreement for Trans-Pacific Partnership (CPTPP)**. The CPTPP is an Asia-Pacific trade bloc made up of 11 countries plus the UK. The original members are Australia, Brunei Darussalam, Canada, Chile, Japan, Malaysia, Mexico, New Zealand, Peru, Singapore and Vietnam. The agreement covers goods and services.



Under the agreement **more than 99% of current UK goods exports to CPTPP members will be tariff-free**. Overall, the UK Government estimates that by 2040, the agreement could boost the UK economy by around £2 billion annually ([UK Government, 2024a](#)). An impact assessment of the agreement (published by the previous UK Government) ([UK Government, 2024b](#)) said that **joining CPTPP will eventually remove nearly all tariffs imposed on UK imports from CPTPP nations**. However, the UK already has bilateral trade agreements with 9 of the 11 CPTPP countries and many see the gains from joining CPTPP as geopolitical rather than economic ([Webb, 2024](#)).

...the agreement could boost the UK economy by around **£2 billion annually**

In the year ending June 2023, 5.8% of Wales's total goods exports with a value of £1.2 billion were destined for CPTPP member countries. The Welsh Government says that the region is important for Wales but has also expressed reservations with some aspects of the agreement ([Welsh Government, 2023](#)). These reservations include that the CPTPP was an existing plurilateral agreement, meaning that the UK had to prove compliance with the existing terms of the CPTPP agreement, falling short of ambition we would normally expect in new and comprehensive FTAs. Furthermore, with the UK Government also signing bilateral trade agreements with CPTPP members, it is difficult to understand where additional benefits come for Welsh producers. Lastly, the importance of the EU market should be vital and any new FTA must not harm the UK/EU trade relationship or set a precedent for future trade deals with other trading partners ([Welsh Government, 2023](#)).

#### 4.4 UK and European Union Trade Cooperation Agreement and the Common Understanding Agreement



In 2021, the UK and the EU agreed a **Trade and Cooperation Agreement (TCA)** and ended the UK's membership of the single market and customs union. Following a change of government in May 2025, the UK-EU held a summit with a view to potentially strengthen bilateral cooperation between the two parties. The Common Understanding between the EU and the UK sets out the outcome of these talks which include further changes to the TCA including **zero tariff and zero quotas** on all trade of EU and UK goods that comply with rules of origin. Both the TCA and Common Understanding include an ongoing commitment to a 'level playing field' ([UK Government, 2025e](#)).

The EU is Wales's most significant trading partner and its largest source of inward investment ([Welsh Government, 2025c](#); [Senedd Research 2025](#)). From July

The EU is Wales's most significant trading partner.

2024 to June 2025, the EU made up the largest share of Welsh export values, accounting for 56.8%, with Germany accounting for most of that with a value of £2.7 billion, compared with the second most, the United States, with £2.2 billion ([Welsh Government, 2025d](#)).

## 5. The effect of tariffs on the determinants of health

### 5.1 Tariffs on exports

In the UK and Wales, the 10% tariff on most exports to the US is broadly expected to impact **negatively** on export markets and the wider UK economy ([NIESR, 2025](#); [Kane et al., 2025](#)). The consequences of this could potentially lead to **reduced incomes and job losses** as demand is reduced through making goods and inputs more expensive in the importing country ([Green et al., 2023](#); [McNamara and Labonte, 2016](#); [Trustnet Learn, 2025](#); [Furceri et al., 2020](#)). Ultimately this may **affect the health and well-being of individuals and communities and those on lower incomes** in particular ([Thurston, 2025](#); [Collis, 2025](#)).

Conversely, the **removal or reduction of export tariffs** can make goods more attractive to overseas consumers and **create opportunities for exporters** thereby **increasing job security and economic prosperity of individuals and communities**. Steel tariffs remaining at 25% but less than the 50% for other countries and the reduction of tariffs on car exports as part of the EPD (particularly when compared to other countries) are expected to benefit UK and Welsh exporters in these sectors and may lead to **increased incomes and employment** ([Jozepa and Webb, 2025](#)). Changes to existing tariff rate quotas ([Agriculture and Horticulture Development Board \(AHDB\), 2025](#)) will also mean that UK and Welsh farmers will be able to export up to 13,000 tonnes of beef to the US, tariff-free. Following the UK-India agreement, India's average tariff on UK products will drop

from 15% to 3%. This is expected to have a **positive impact** as British companies selling products to India will find it easier to sell to the Indian market ([UK Government, 2025f](#)) thereby **increasing incomes** for **businesses** and **workers** with subsequent benefits for health and well-being for them and their families. Under the CPTPP agreement, almost all UK goods exports to CPTPP member countries will be tariff-free. However, the overall volume of trade expected under the CPTPP means any **positive** or **negative** impacts are **likely to be limited** ([Webb, 2024](#)).



Some studies have noted that although **medicines are currently excluded from US tariffs** for the UK ([Mishra et al., 2025](#); [Navarro et al., 2025](#)), **raw materials may not be**. Pharmaceuticals are currently tariff-free since the EPD gave the UK preferential treatment on tariffs, but talks are ongoing and President Trump has threatened to impose tariffs of up to 100% on pharmaceutical imports ([Bloom and Hug, 2025](#)). Pharmaceuticals and the raw materials involved in producing pharmaceuticals, might be exposed to higher tariffs. This could result in increased production costs for US exporters if these medicines are subsequently imported into the UK, and consequently increasing costs for businesses and consumers. This has the potential to have a **negative impact** on **people with ongoing health conditions** and those on **lower incomes** ([Raju and Patel, 2025](#)).

Some studies have noted that the **new US tariffs on UK goods will be lower than those applied to other countries**, meaning UK exports could become cheaper than competing countries and may therefore increase exports as a result ([Beck, 2025](#); [Jozepa and Webb, 2025](#)). Furthermore, if the US introduces and maintains higher tariffs, businesses in countries subject to the steep US retaliatory tariffs might shift their operations to the UK to gain better access to the US market. As a result, the **UK could experience an increase in foreign investment** ([Lilico, 2025](#)). Such a scenario has the potential to have **positive direct** and **indirect impacts** on growth, jobs, incomes and sustainability ([Unite, 2017](#)) with associated impacts on the health and well-being of individuals and the wider community.

## 5.2 Import tariffs

For UK businesses, **tariffs on imports** can also have both **negative** and **positive** impacts ([Matthews, 2025](#); [Senedd Research 2025](#); [Jozepa and Webb, 2025](#)). Import tariffs can lead to increased costs, supply chain disruptions, and reduced profits for businesses. **Workers** in sectors affected by import tariffs may experience **job insecurity and unemployment** ([Cyrus, 2018](#)); workers would experience this if firms recoup increased costs through cuts to employment. This can **negatively** impact their health and well-being and potentially lead to anxiety, depression and even substance misuse.

However, the **removal or lowering of tariffs** on imported goods could also have a **negative impact** on **workers** in UK businesses as they face increased competition from foreign businesses ([Trades Union Congress, 2018](#)). Under the EPD, the UK and the US have agreed to remove a 20% import tariff on US beef as well as a preferential beef tariff rate quota equal to the export quota for UK producers. Despite this, the AHDB has expressed concerns over imports of high value, premium cuts from the US that could potentially have a considerable impact on the UK domestic market ([AHDB, 2025](#)). The UK is also thought to be at risk from premium beef imports from Australia and New Zealand as a result of existing trade deals with with these countries ([AHDB, 2025](#)).

One potential **positive** impact under the CETA, is that **reduced tariffs** on Indian goods will make it easier and cheaper for British businesses to buy components and materials used in industries such as advanced manufacturing or luxury and consumer goods ([UK Government, 2025f](#)), **potentially** leading to **increased job security for workers** and their families.

For consumers, the **removal or lowering of tariffs** can also have **positive** impacts for **individuals and families**, particularly those on **low incomes** as they respond to increased competition and lower consumer prices. Although some evidence suggests that joining the CPTPP has the potential to lead to reduced tariffs on a wider variety of food products from other member states and therefore cheaper food ([Dayan and McCarey, 2021](#); [Schram et al., 2018](#)), these **impacts are likely to be modest** in view of the limited economic benefits expected from the deal ([Webb, 2024](#)). However, where lower prices lead to the **consumption of unhealthy products** such as alcohol, tobacco and processed foods this can have a **negative** impact on population health through escalating heart disease, lung cancer and diabetes ([Siegel et al., 2016](#); [Cyrus, 2018](#); [Schram et al., 2018](#)). For **people on lower incomes** in particular, this can lead to a range of health issues amongst both adults and children and can affect both their **physical** and **mental health**.

## 6. Case Studies

The two case studies below highlight how health and equity is directly and indirectly impacted by trade and trade agreements.

### Case study 1: Welsh farmers and the Comprehensive and Progressive Trans-Pacific Partnership (CPTPP) Agreement

Following the UK's accession to the CPTPP Welsh food and drink producers have increased opportunities to export to CPTPP member countries where they previously faced high tariff and non-tariff barriers. This has potential positive and negative impacts for Welsh farmers, people living in rural areas and the wider population.

The National Farmers' Union has expressed concern over the potential for the expansion of sheep meat exports to some CPTPP countries. UK farmers would have to compete against Australia and New Zealand who are the dominant suppliers in the region. Australia and New Zealand produce to lower animal welfare standards, standards of production, less strict environmental, climate and labour regulations and lower cost of production than UK producers, which means they can sell their products at cheaper prices, potentially giving them a market advantage.

On the other hand, there are opportunities for exports to other Southeast Asian countries in the medium to long term. Malaysia presents an opportunity for mutton as it is widely used in Malaysian diets and the country is currently almost completely reliant on imports. The UK does not currently have a bilateral deal with Malaysia, meaning that access to the Malaysian market would provide an additional export opportunity for Welsh and UK sheep farmers.

An increase in tariff-free imports from CPTPP members could lead to UK and Welsh farmers facing increased competition from much larger overseas competitors able to take advantage of economies of scale and the associated reduced costs.

[Green et al., 2023](#); [National Farmers' Union, 2022](#); [House of Lords, 2021](#); [Corsair, 2024](#)



## Case study 2 : Imports of US ethanol

The removal of import tariffs on US produced ethanol has already affected the health and well-being of British workers. British ethanol is mainly made from feed wheat which supports farmers across the UK and Wales. It is used to create E10 petrol blend to reduce emissions. UK bioethanol plants currently have capacity to purchase around two million tonnes of wheat each year from UK farmers. The process also creates two important by-products of carbon dioxide and high protein animal feed.

The US is the world's largest producer of ethanol. Due to high production levels and associated low costs it is able to export at a competitive price on the international market. The recently negotiated US-UK trade deal will remove the current 19% tariff on ethanol imports to the UK and replace this with a duty-free tariff rate quota of 1.4 billion litres.

The new tariff changes mean there is a risk that more competitively priced US ethanol imports will be preferred to UK produced ethanol. Concerns raised by industry observers about serious impacts on UK jobs have been realised following an announcement that the UK's largest bioethanol plant based in the north of England is to close operations due to tariff-free imports from the US.

[Collis, 2025](#); [Jack and Hooker, 2025](#); [Narwan, 2025](#)



## 7. Conclusion

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Trade has many positive impacts on health for example, it can raise living standards, increase national and individual income and allow for improved health and well-being through greater spending on healthcare, food and other determinants of health. However, it can also worsen intranational inequality, leading to reduced income, unemployment and poorer health outcomes ([Cyrus, 2018](#); [Petchey and Cresswell, 2021](#)). Examining contemporary trade and investment agreements reveals multiple tensions between the goals and effects of trade and investment liberalisation and the protection and promotion of population health ([Friel et al., 2015](#)).

Recent events have shown that trade agreement negotiation is a complex, dynamic and ever evolving process. Although much of the detail is still to be agreed, the inclusion (or exclusion) of **tariffs can have a major impact on population health, well-being and equity both positively and negatively, directly and indirectly.**

Trade policies affect the options and resources available to health policymakers. It has already been noted that trade negotiation is a reserved matter for the UK Government. However, the Welsh Government has its own trade policy ([Welsh Government, 2025e](#)) underpinned by the Well-being of Future Generations Act, which itself incorporates a Health in all Policies approach ([Welsh Government, 2025f](#)).

Increased transparency in trade policymaking benefits the health sector and the health and well-being of the wider population. Governments must ensure that health and trade policy objectives are aligned ([Barlow et al., 2022](#)), and that participation in trade policymaking by health interests should be encouraged ([Jarman, 2017](#)) so that an understanding of health consequences can be factored into decision-making.

Health Impact Assessment (HIA) is a beneficial process to identify the impact on health, wellbeing and equity when trade agreements are being negotiated at a national or regional level and can highlight the impact any tariffs or barriers which may be contained within them could have. **HIAs on potential and completed trade agreements** (with or without tariffs) should routinely be carried out in order to identify and evaluate **positive** and **negative** impacts on population health. Once identified, mitigating actions can be taken to **reduce the impact of unintended negative impacts on health, well-being and equity** and **maximise opportunities** to ensure a healthier future for the people of Wales.

# Appendix:

**Table 1: Increased trade and health impacts** (adapted from the [Faculty of Public-Health Knowledge, n.d.](#); [Green et al., 2023](#))

Direct impacts		Indirect impacts	
Positive +	Negative -	Positive +	Negative -
<ul style="list-style-type: none"> <li>Increased availability of goods beneficial to health (e.g., medicines, healthy food)</li> <li>Increased access to cheaper imports for consumers and households who benefit from lower prices and increased choice (<a href="#">Department for International Trade, 2018</a>)</li> <li>Reduced export tariffs can increase business opportunities for British companies leading to increased job security for workers</li> </ul>	<ul style="list-style-type: none"> <li>Increased availability of less healthy foods</li> <li>Increased costs of medicines and medical products can affect people with long-term conditions and those on lower incomes</li> <li>Tariffs on imports can lead to increased costs for UK businesses and potential job insecurity or job losses for workers</li> <li>Removal of tariffs can lead to increased competition and potential job losses for workers</li> <li>Smaller businesses may face increased competition from larger overseas companies</li> </ul>	<ul style="list-style-type: none"> <li>Poverty reduction through employment</li> <li>Increased GDP and other development leading to improved services</li> <li>Increased knowledge through academic and industry collaborations</li> <li>Increased collaboration between countries encourages countries to respond to what happens outside their borders when developing health policy and interventions</li> </ul>	<ul style="list-style-type: none"> <li>Increased transportation from more trade exports and imports, resulting in greater use of fossil fuels for transport and economic development</li> <li>Possible increased pollution from reduced standards</li> <li>Climate change, potentially including droughts, floods and rising sea levels from increased emissions and transportation</li> <li>Reduced food standards and safety leading to poorer diet and nutrition</li> </ul>

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