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PRESTIGE PURCHASING

CGA PRESTIGE FPi FOODSERVICE PRICE INDEX

CGA Prestige **Foodservice Price Index (FPI)**

Snapshot Report - September 2025

Your source for accurate data, analysis and insights into today's food prices.

Monthly Snapshot..

Executive Summary

The CGA Prestige Foodservice Price Index (FPI) reached 151.1 in September 2025, reflecting a month-on-month (MoM) inflation rate of +0.7%. This latest movement marks the sixth consecutive month that wholesale food and beverage prices have risen for UK hospitality and foodservice operators. Year-on-year (YoY) inflation for the sector now sits at +3.7%, a minor increase of 0.1% from the previous month, highlighting the sustained and structural nature of current market pressures. The broader global environment offered mixed signals: the FAO Food Price Index (FFPI) averaged 128.8 points, showing a fractional decline from August as falls in the cereal, dairy, sugar, and vegetable oil indices outweighed a rise in meat prices. Energy costs, a major underlying concern, saw Brent Crude oil prices move up +0.5% MoM, settling at £52.13, though they remained lower by -6.4% YoY. This global moderation failed to translate fully into UK landed costs, with domestic operational factors remaining the primary cost driver.

The most acute price pressures in the UK were seen in Oils & Fats, which recorded the highest MoM surge at +2.9%. International vegetable oil markets exhibited mixed movements, with the overall decline in palm and soybean oil prices more than offset by climbing sunflower and rapeseed oils, which continued to be driven by ongoing supply tightness in the Black Sea region and Europe. The Bread & Cereal category followed closely with a +1.6% increase. While global grain markets showed some softening—with wheat prices falling for the third consecutive month due to large harvests—UK bakery producers continue to face higher energy, packaging, and labour costs, largely negating the benefit of softer commodity prices and keeping finished product prices firm.

Inflation Ups & Downs against August..

BREADS & CEREALS

Up 1.6%

FISH

Up 1.4%

MEAT & POULTRY

Down 0.1%

OILS & FATS

Up 2.9%

Supply chain restrictions and adverse climate continued to drive costs in other critical areas. The Fish category rose by +1.4% as acute whitefish shortages persisted. Cod quotas in the North Sea and Barents regions have been further restricted, driving market prices significantly higher, compounded by high input costs across fuel, freight, and labour. Domestically, challenging summer weather contributed to a +0.5% rise in Vegetables. Prolonged heat and water scarcity affected yields across the board, with broccoli, cauliflower, and potatoes all suffering reduced yields or smaller tuber sizes, leading growers to warn that consistent rain and moderate temperatures will be essential to stabilise supply into winter. Fruit also saw a +0.5% rise, supported by persistent cost pressures across Europe, notably in labour-sensitive lines like berries and sharply down Spanish lemon yields following frost losses.

Inflationary signals were complex in the beverage and dairy segments. The Coffee, Tea & Cocoa category rose +1.4%, driven by tightening global supplies in coffee and tea, with Arabica futures rallying on lower certified stocks. This contrasts sharply with a significant plunge in global cocoa futures, a market correction that may eventually offer relief to chocolate supply chains but is currently being absorbed by persistent logistical and processing costs. This cocoa volatility contributed to the +1.3% rise in the Sugar, Jam, Syrups & Chocolate category, despite European white sugar prices softening. Milk, Cheese & Eggs increased by +0.8%, reflecting sustained upward pressure supported by high production costs for feed, fuel, and labour, alongside a continued decline in the national milking herd. Meat prices, while flat at -0.1% MoM, continued to reflect sustained inflationary pressure with escalation in beef and lamb prices underpinned by declining cattle numbers. Finally, the Mineral Water, Soft Drinks & Juices category offered a rare moment of monthly relief, contracting slightly by -0.4% due to easing pressure on major inputs like softened sugar futures, PET resin, and transport-fuel costs. However, underlying structural costs such as packaging tax changes and labour increases are expected to prevent a broader reversal in this sector.

Prestige Purchasing are a leading expert in Value Chain. We provide knowledge, insight, and practical support to hospitality and foodservice businesses. We improve profitability by improving the way in which our clients source and manage what they sell.

Our services are tailored to allow us to assist businesses of any scale in the sector. Offering a bespoke consultancy based model we offer services contextualised in the statements below for our clients.

Supply Optimisation
For growing businesses that have not yet established a mature supply chain function we provide outsourced services that deliver profit improvement through the application of best in class techniques, using our team of experienced and capable buyers.

Procurement Transformation
For established businesses that have yet to establish "strategic procurement" and wish to introduce national, regional or global supply arrangements, often establishing their own team to develop and maintain them.

Procurement Support Services
A portfolio of services to support fully established procurement and supply chain teams in their mission to add value to their organisation. Services include Insight, Training, Analytics and Benchmarking.

Our services are 100% Transparent FIXED fee based and deliver between 2 and 7 times return on investment all backed up with financial guarantees.

We do not aggregate volume with other operators and build each project or service bespoke for each of our clients' needs delivering the maximum benefit to our clients bottom line.

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CGA by NIQ provides definitive On Premise consumer intelligence that reveals new pathways to growth for the world's most successful food and drink brands. With more than 30 years of best-in-class research, data, and analytics, CGA by NIQ provides the Full View™.

CGA by NIQ works with food and beverage suppliers, consumer brand owners, wholesalers, government entities, pubs, bars, and restaurants to protect and shape the future of the On Premise experience. Using the most complete and clear understanding of measurement and insights, CGA by NIQ provides a competitive edge to guide winning strategies for On Premise businesses.

NIQ was founded in 1923 and is an Advent International portfolio company. For more information, visit NIQ.com or www.cgastrategy.com.

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