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CGA PRESTIGE
FPI
FOODSERVICE PRICE INDEX

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

Snapshot Report - November 2025

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

Monthly Snapshot..

Executive Summary

The UK Foodservice Price Index (FPI) reached 151.1 in November 2025. This return to inflationary growth follows a brief decline in October, signalling that the previous month's easing was temporary as the sector entered the critical festive trading period. Despite some global softening, hospitality operators continue to face a structurally higher cost base compared to 2024.

A clear divergence has emerged between global commodity trends and UK wholesale realities. The FAO Food Price Index (FFPI) averaged 125.1 points in November 2025, down 1.5 points (1.2%) from October, marking a third consecutive monthly decline. Decreases in the price indices for dairy products, meat, sugar, and vegetable oils outweighed an increase in the cereal index. Overall, the FFPI stood 2.6 points (2.1%) below its November 2024 level. However, these global reductions have not fully translated into the UK market, where domestic supply chain shocks and operational overheads remain dominant. Energy costs also crept upward, with average Brent Crude oil pricing rising to £49.07, up from £48.86 in October, adding marginal pressure to distribution and processing expenses.

Inflation Ups & Downs against October..



In the UK, the return to inflation was driven by sharp reversals in key categories. Milk, Cheese & Eggs swung from a decline in October to a +1.1% rise in November. While global dairy markets softened, domestic prices were forced up by renewed Avian Flu outbreaks tightening egg supplies. Similarly, Sugar, Jam, Syrups & Chocolate rose by +1.0%. Although global sugar indices fell, persistent multi-decade highs in cocoa futures due to West African harvest failures kept chocolate prices elevated during peak seasonal demand.

The Meat & Poultry category also remained firm, rising +0.5% MoM. This contrasts with the global FAO Meat index, which declined. The UK market is facing specific, acute challenges: Avian Flu has prompted 30-day export bans on major turkey suppliers, creating significant shortages and driving up spot prices just as festive procurement volumes hit their peak. Coffee, Tea & Cocoa continued its inflationary trend, rising +1.0% due to tight global coffee supplies and weather disruptions in key growing regions like Brazil and Vietnam.

Conversely, some categories provided a buffer against wider inflation. Vegetables recorded a decline of -0.4%, supported by good seasonal availability of UK root vegetables and brassicas, though potato yields remain regionally inconsistent. Bread & Cereal saw a fractional decrease of -0.2%, despite a global rise in the FAO Cereal index, suggesting some temporary domestic stability in this category.

Looking ahead, the disconnect between falling global indices and rising UK foodservice prices highlights the impact of localised volatility—specifically Avian Flu and structural labour/energy costs. With the festive season exacerbating demand-side pressure, operators are advised to maintain agile sourcing strategies to navigate a winter period defined by specific, high-impact supply shocks.



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.

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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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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, NIQ provides the Full View™.

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, 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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