



NIQ

PRESTIGE
PURCHASING

CGA PRESTIGE
FPI
FOODSERVICE PRICE INDEX

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

Snapshot Report - December 2025

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

Monthly Snapshot..

Executive Summary

Food and drink prices in the hospitality sector rose by 1.1% in December, with the Foodservice Price Index (FPI) reaching 152.8, NIQ and Prestige Purchasing revealed. This sharp upward movement marked a significant acceleration in inflation to close the year, driven by intense seasonal demand and persistent supply-side constraints during the festive trading period.

The month was characterised by steep increases across high-volume categories. Milk, Cheese & Eggs recorded the highest rise at +1.9%, as domestic price pressures intensified despite continued softening in global dairy commodity markets. Avian Flu-related disruptions specifically reinforced volatility in egg supply chains, compounding costs during a peak usage window. Fruit prices followed closely, rising +1.8% as the market shifted to higher-cost glasshouse production for soft fruits and faced significant yield reductions in Spanish citrus.

Inflationary momentum also remained critically high in Coffee, Tea & Cocoa. Coffee markets continued to trade near multi-year peaks due to adverse weather in Brazil and Vietnam, while cocoa prices remained close to record levels, underpinned by weak West African harvests and exceptionally tight inventories.

Inflation Ups & Downs against November..



**COFFEE, TEA
& COCOA** ↑

Up 1.7%



FRUIT ↑

Up 1.8%



**MILK, CHEESE
& EGGS** ↑

Up 1.5%



MEAT & POULTRY ↑

Up 1.9%

The festive centrepiece category, Meat & Poultry, saw inflation accelerate to +1.5%. Strong seasonal demand collided with structural challenges; beef traded at historically strong levels due to tight domestic availability, while poultry markets remained volatile as Avian Flu disruptions influenced supply dynamics throughout December. Oils & Fats and Sugar, Jam, Syrups & Chocolate also contributed to the rising index, highlighting a broad-based inflationary environment where domestic energy, labour, and logistics costs limited the pass-through of any global commodity softening.

The 1.1% month-on-month surge in December is a stark reminder of the volatility that continues to plague the supply chain. While global indices for sugar and vegetable oils showed signs of easing in 2025, the reality for UK operators was very different. Acute supply shocks—from Avian Flu in poultry and eggs to climate-driven shortages in coffee and cocoa—combined with high domestic operational costs to drive prices up significantly just as the sector needed stability the most.



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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