



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

Snapshot Report - October 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 150.6 in October 2025, recording a month-on-month (MoM) decline of -0.3%. This movement marks a significant break in trend, representing the first monthly fall in wholesale food costs after six consecutive months of increases. However, year-on-year (YoY) inflation remains elevated at +3.8%, indicating that while immediate pressure has eased, the sector continues to operate within a structurally high-cost environment compared to 2024.

Global market signals have heavily influenced this month's cooling. The FAO Food Price Index (FFPI) averaged 126.4 points in October 2025, down 2.1 points (1.6%) from the revised September level of 128.5 points, marking its second consecutive monthly decline. Lower price indices for cereals, dairy products, meat, and sugar outweighed an increase in the vegetable oil index. Overall, the FFPI was slightly below its October 2024 level and remained 33.8 points (21.1%) lower than its peak in March 2022. Energy costs also provided relief, with average Brent Crude oil pricing falling to £48.86, down from £52.13 in September.

Inflation Ups & Downs against September..



In the UK, this easing was most visible in the Vegetables category, which fell by -1.6% MoM. Improved seasonal availability and better crop emergence across the UK supported this decline, although challenges persist with variable potato yields and smaller brassica sizes due to prior heat stress. The Milk, Cheese & Eggs category also contributed to the downward trend, dropping -1.5%, reflecting a global softening in dairy markets where declines in whole milk powder and cheese quotations helped alleviate costs. Additionally, Sugar, Jam, Syrups & Chocolate fell by -1.2%, and Oils & Fats dipped by -1.1%, offering further respite to operators.

However, significant volatility remains in key protein and fresh categories. Meat & Poultry moved against the wider trend, rising by +0.7%. Despite global meat indices softening, the UK poultry market is facing acute instability due to renewed Avian Flu outbreaks and unprecedented 30-day export bans on major turkey suppliers, creating severe shortages ahead of the festive trading period. Similarly, Fruit prices rose by +1.1% as the domestic strawberry season ended, forcing a shift to higher-cost glasshouse imports from Holland and Belgium, while supply issues in Spanish citrus further underpinned inflation.

Looking ahead, while the month-on-month decline provides a welcome breathing space, the market remains fragile. The divergence between falling global commodity indices and specific domestic supply shocks—particularly in poultry and fresh produce—suggests that operators should view this easing with caution. With structural costs such as labour and non-commodity energy remaining high, and festive demand accelerating, agile sourcing strategies will be essential to navigate the uneven pricing landscape expected through winter.



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