

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

Snapshot Report - September **2026**

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

Monthly Snapshot..

Executive Summary

The UK Foodservice Price Index reached 155.5 in September 2026, recording a month-on-month inflation rate of 0.9%. Following the relatively modest movements seen throughout the summer, this distinct upward shift indicates that market pressures are steadily building as the industry transitions into the autumn and winter seasons. Year-on-year inflation also continues to remain up, underscoring a persistently elevated cost base that is increasingly vulnerable to global macroeconomic shocks. This domestic firming aligns closely with a broader strengthening across international food and energy markets.

The FAO Food Price Index averaged 136.0 points in September, rising 1.5% from its revised August level, driven by increases across all crop-based commodity groups including cereals, vegetable oils, and sugar. This pushes the global index 5.8% higher than a year ago, although it remains below its 2022 peak. Crucially, these agricultural pressures are being compounded by a severe energy shock, with the average Brent Crude oil price surging to £82.43 per barrel in September, up significantly from £63.83 in August. This substantial jump in fuel costs is actively inflating logistics, packaging, and processing expenses across the entire supply chain.

Inflation Ups & Downs against August..

BREADS & CEREALS ↑

Up 1.8%

FISH ↑

Up 2.0%

MEAT & POULTRY ↓

Down 0.2%

OILS & FATS ↑

Up 3.4%

The impact of these global pressures was clearly visible across the UK basket, particularly within the bread and cereal category, which experienced a 1.8% month-on-month increase as international wheat and maize markets reacted to Black Sea disruptions and adverse weather. The oils and fats category also surged by 3.4% as strong import demand and dry weather in Southeast Asia pushed palm oil prices higher. Furthermore, the sugar, jam, syrups, and chocolate category rose by 1.5%, directly reflecting a 6.1% jump in the FAO Sugar Price Index caused by lower European beet forecasts and harvest disruptions in Brazil. Fresh produce is also beginning to reflect the strain of the transition away from the domestic summer harvest. Vegetables rose by 0.7% month-on-month as the lingering effects of prolonged hot and dry European weather became apparent, particularly impacting yields and quality for potatoes and onions. Fruit similarly increased by 0.8% as reliance shifted towards imported goods, exposing the category to higher freight costs and currency fluctuations. The fish category remained one of the most inflationary areas, climbing 2.0% as strict North Atlantic quota reductions for cod and haddock prevented any seasonal easing.

Amidst this broad-based firming, the meat and poultry category offered the only notable relief, declining by 0.2% month-on-month as global poultry and pork markets softened due to ample export availability and recovering animal growth rates. However, with dairy markets also creeping up by 1.0% due to tightening European milkfat availability, the overall September data paints a picture of a market where underlying supply constraints and resurgent energy costs are setting the stage for firmer pricing. While the current 0.9% monthly movement remains measured, it represents a clear loss of the stability enjoyed over the summer, signalling that operators must prepare for a more challenging procurement landscape throughout the remainder of the year.

PRESTIGE PURCHASING

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.

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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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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.

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NIQ

NielsenIQ (NYSE: NIQ) is a leading consumer intelligence company, delivering the most complete and trusted understanding of consumer buying behavior and revealing new pathways to growth. By combining an unmatched global data footprint and granular consumer and retail measurement with decades of AI modeling expertise, NIQ builds decision systems that help companies turn complex data into confident action.

With operations in more than 90 countries, NIQ covers approximately 82% of the world's population and more than $7.4 trillion in global consumer spend. Through cloud-based platforms, advanced analytics and AI-driven insights, NIQ delivers The Full View™—helping brands and retailers understand what consumers buy, why they buy it, and what to do next.

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