

Market Report

October 2025

Procurement
Partners



Meat & Poultry

- The category remains challenging with high pricing on Beef and Chicken. Pork continues to replace red meat as a cheaper alternative but is driving up demand. Talk has now turned to turkey as producers gear up for the festive season. It is predicted to be the most challenging in recent years with record level prices and tight supply.
- The beef category remains under pressure with cattle numbers down 5% annually. Predictions for 2026 suggest a further reduction of 6%. Despite this, demand is up 1.5% year on year in the UK. Whilst prices remain high, the volatility has settled and there are small pockets of reductions to be had as suppliers look to retain or win back spend.
- Poultry prices are up 10% year on year although short term stability is expected as the market anticipates some drops in feed pricing. Chicken continues to be an affordable alternative to red meat and so demand remains high. The good news is that welfare standards are improving with more higher quality products available.
- Turkey supply remains tight and is likely to struggle in the run up to the festive season. There is limited frozen availability and suppliers are turning to Brazilian sources to plug the gaps. Prices are around 30% higher than last year and this will likely rise as we enter the next few months.
- Pork prices in the wider market continue to creep up as consumers switch into this lower cost alternative. We have seen minimal impacts this month on pricing.
- Following the new season lamb prices reaching record highs this spring, prices have remained elevated. We have seen some movement this month in the region of around 0.5%. Production is up but demand is expected to have declined by around 7% for 2025 so we should see some softening of prices over the next quarter as this balances out.

Recommendations

- Consider cheaper beef options like topside or feather blade as an alternative to sirloin if it is to remain on menus.
- Speak to your suppliers now regarding turkey prices and availability – securing volume now could help alleviate problems nearer to Christmas.
- Review centre plate options, considering poultry and pork alternatives.



Seafood

- Typically September to November is the best season for our native species. That said, weather conditions at this time of year can affect availability with limited notice. The challenges in the whitefish category continues to impact price volatility and product availability. Salmon enters into its busiest demand period following a good period of stability and price reductions. Lobster prices are on the rise again after some relief during the Canadian season, which has now closed. Mussels are back in this month and provide a sustainable and cost effective menu option.
- Some positive news for Haddock quotas that have seen an increase this season. Whilst this should bring some softening to prices, the anticipated reductions to Cod quotas will add pressure and likely reverse any price benefits in due course. For now though we are seeing cost reductions of around 5% this month. The new Icelandic quota starting on the 1st September is also welcomed.
- Despite ongoing tariff impositions from the US, Salmon has afforded some healthy price reductions over the last few months. In some cases we have seen reductions of between 5-10%. This has filtered down into smoked salmon prices too as producers secure stock at the lower prices. Expect further increased though as we head into the festive season.
- Monkfish landings remain steady and pricing stable, with prices 4-5% lower over the last few months. The natural increase in price will take hold over the coming months as Christmas demand peaks so expect increased upwards of 10% from current prices.
- Gurnard will be coming into season shortly providing some flexibility in round fish species.
- Prices are slowly increasing following the end of the Canadian lobster season, around 12% month on month and around 8% since June. Native lobster is available but stocks are being impacted by an invasion of squid and octopus in some key areas so it is expected that prices will start to rise soon. Take advantage while you can.
- Mussels are now in season and offer great value on menus alongside native crab and scallops.

Recommendations

- Consider MSC ratings on your fish choices and look for sustainable options – these will likely come with some price benefit.



Fruit & Veg

- We now see the shift from ample abundance of UK grown summer favourites to the first signs of autumn; which brings a drop off in availability of predominantly berries and salad lines but an uptake in autumn favourites such as apples, pears, brassicas and roots. Prices remain steady across most crops although we see the first signs of the switch over into imported products.
- Berries pricing has started to increase slowly over the month by around 5% from some suppliers as availability slows and quality dwindles. There are still plenty of them around though.
- Salads are in their crossover phase with the last of the UK varieties coming through, mixed in with some Dutch volumes, specifically on tomatoes, peppers and cucumber. Prices have crept up by around 2% across the whole category this month.
- Due to poor harvests in South Africa we are seeing pressure on pricing of citrus fruits with prices increasing by up to 25% in some cases. This tends to be temporary as origin switches over into Europe however harvests are reportedly poor so prices may not come back down for a while.
- British apples and pears are in full swing with good availability.
- Concerns remain about the impact of the hot summer on potatoes with the planting of winter crops delayed. Current quality is good though and pricing reasonable and steady with some price benefits recorded in the region of 4-5%. The impact will likely be felt later in the year or early 2026.
- Brassicas have struggled with the hot weather leading to poor availability and quality. Price increases of up to 40% have been seen on Cauliflowers this month as supplier seek alternative sources. Broccoli was impacted to a lesser extent but we still saw increases of around 10% in some cases.
- Autumn favourites such as kale, savoy cabbage and leeks are showing great quality this month. Consider featuring earlier on menus.

Recommendations

- Keep close to seasonal produce at this time of year and take advantage of new season varieties; avoiding sharp price increases where availability tails off.



Dairy and Eggs

- Dairy prices have been high for most of year with some slight relief coming from spot milk prices for a short period across the summer. This did not translate into reductions on other key commodities such as cream and butter so prices remained firm. Cattle feed and labour costs remain a challenge for the industry and price benefits are few and far between at moment.
- Milk pricing saw a small rise this month of around 1.5% following the increased availability during the summer months and favourable spot milk pricing. Farmgate milk prices rose again in August.
- We saw small increases of around 2% on butter this month driven by higher farmgate milk prices in August. Recent reports suggest that there is some softening due in these prices for September but it remains to be seen if these benefits will reach consumers.
- Cheese demand remains high, driven by QSR and casual dining outlets. We have seen increases of around 2% this month in line with milk and butter.

- The eggs category seems to be slowly stabilising following a tough few years. While prices remain high, availability is improving as producers see less occurrences of Avian Flu. Some producers are reporting good availability which is leading to reductions being available on pricing of around 10% in some cases.

Recommendations

- Stick with dairy suppliers over generalists who can provide sharp pricing direct from producers.
- Consider bulk purchasing on butters and creams to benefit from economies of scale.
- Review opportunities to reduce dairy content in dishes and consider plant based alternatives that can drive down recipe costs and reduce allergens.



Dry Stores & Frozen

- Food price inflation rose for the fifth month in a row for August with commodity cost prices rising at the fastest rate since the beginning of last year. The cost of food grew at an annual rate of 5.1%, according to ONS with beef, butter, milk and chocolate the biggest contributors.
- Chocolate prices continue to rise with increases of around 15% recorded to Aug 2025. Adverse weather conditions in cocoa growing countries such as Ghana have seen raw material costs double.
- Coffee similarly to Chocolate has seen increases of around 15% year to date but demand has not dampened with the continue rise in café culture. Climate, rising global transport costs and higher input costs have all contributed.
- Oil prices remain impacted by a multitude of factors, given the global nature of supply. Olive Oil prices are bouncing back after a difficult few years and prices have stabilised somewhat in recent months. Rapeseed prices are standing firm and small increases of around 1-2% have filtered through this month.

- Nuts prices are continuing to rise as global demand peaks. Predominantly driven by plant based alternative milks and their popularity as a healthy snack alternative. The category is seeing increases of around 25% across the board.

Recommendations

- Review dry store purchases and consider tendering key lines to seek more competitive prices.
- Evaluate current supply / collection of food oils as prices are volatile, and the value of waste oil is also increasing so ensure that your terms reflect this.

