

PRESTIGE

Optimising Hospitality Procurement

WELCOME TO THE CGA PRESTIGE FOODSERVICE PRICE INDEX ANNUAL BRIEFING 2025

CGA PRESTIGE

FPI

FOODSERVICE PRICE INDEX
ANNUAL BRIEFING 2025



EP

Business in Hospitality

UKH
UK HOSPITALITY

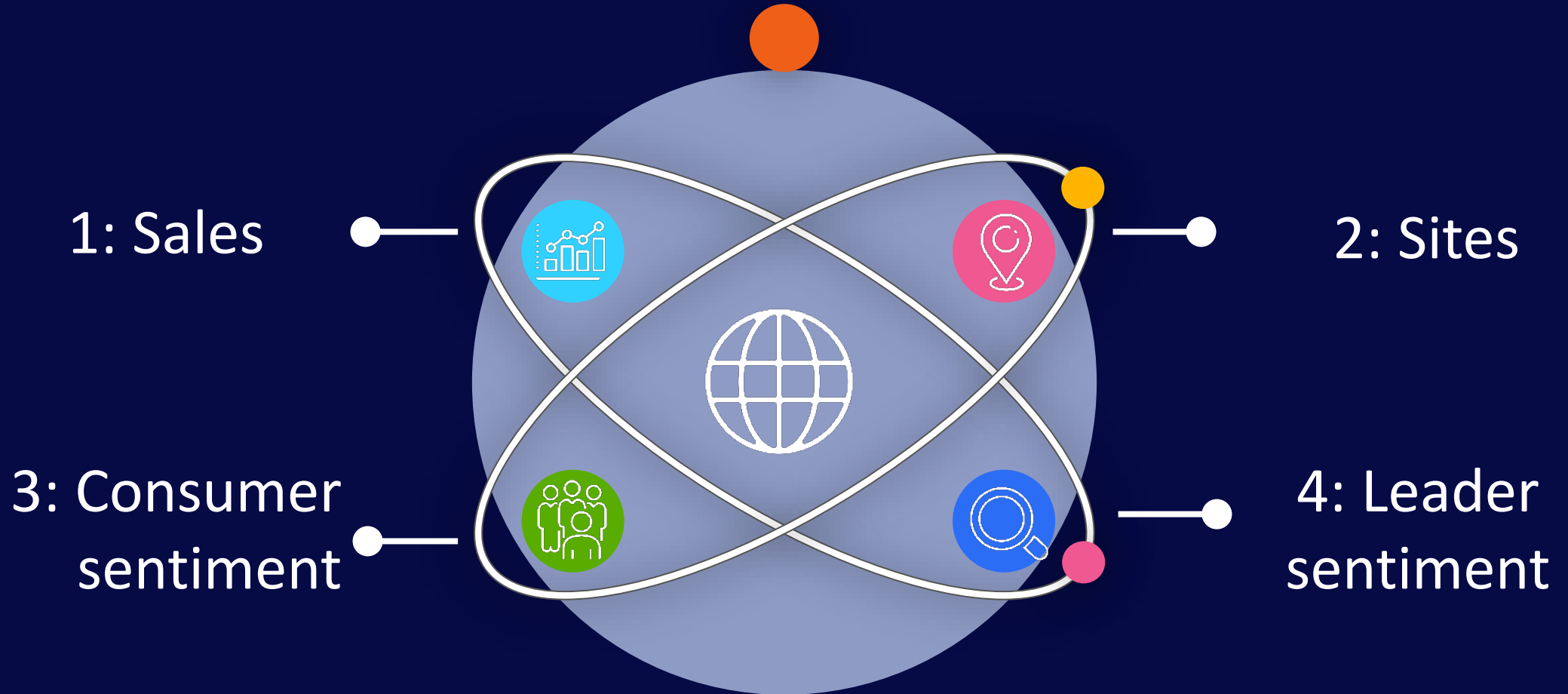
CGA
Powered by NIQ

Market dynamics and connecting with consumers

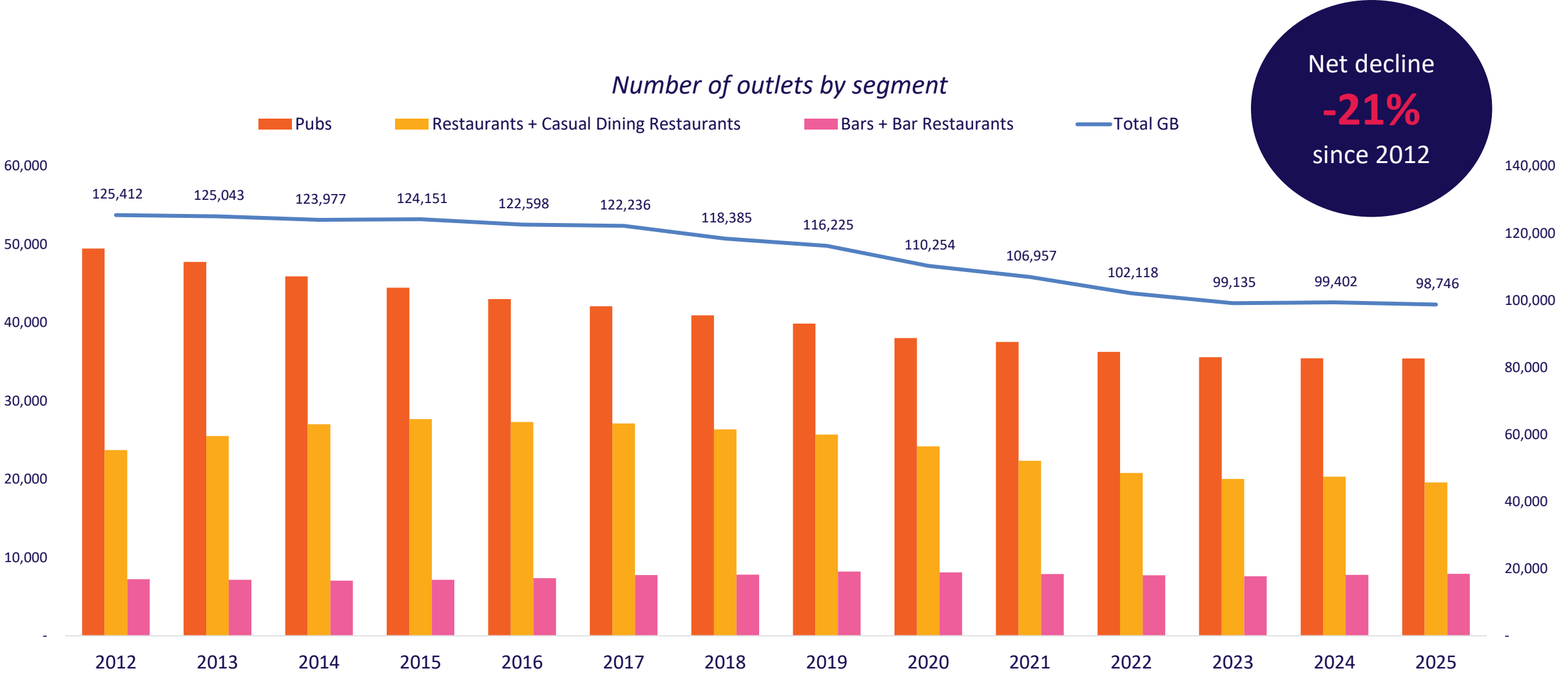
Karl Chessell,
Director, CGA by NIQ



Sites, sales & sentiment



The significant rate of net closures over the pandemic has slowed but the market is still shrinking and there is underlying churn



Loss of independents in larger food-led channels and nightclubs have tipped the overall market into year-on-year decline

At the end of September 2025, there were

99,296

licensed sites in Great Britain.
Over the past year,

- 572

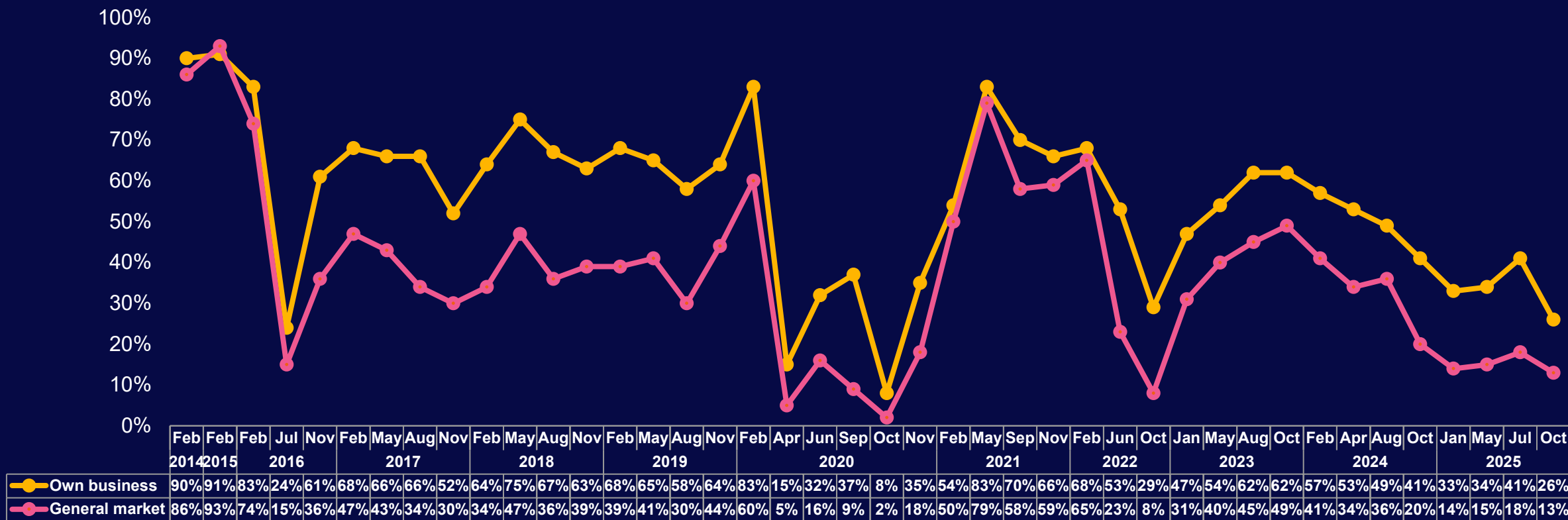
net sites have been lost,
seeing the market decline by

- 0.6%

Sector	YoY % change	QoQ % change
Bar Restaurant	+2.4%	+3.6%
Bar	+1.3%	+0.8%
High Street Pub	+0.5%	+0.5%
Community Pub	+0.2%	-0.2%
Casual Dining Restaurant	-0.1%	+2.0%
Food Pub	-2.0%	-0.2%
Restaurant	-2.7%	+2.2%

Leaders' confidence in their own businesses has declined by 15pp on last quarter, falling to a level only worse throughout the COVID-19 pandemic

Business leader optimism in the **general market** and in **own business** (over the next 12 months)



Jun-16
Brexit referendum

2020
COVID lockdowns

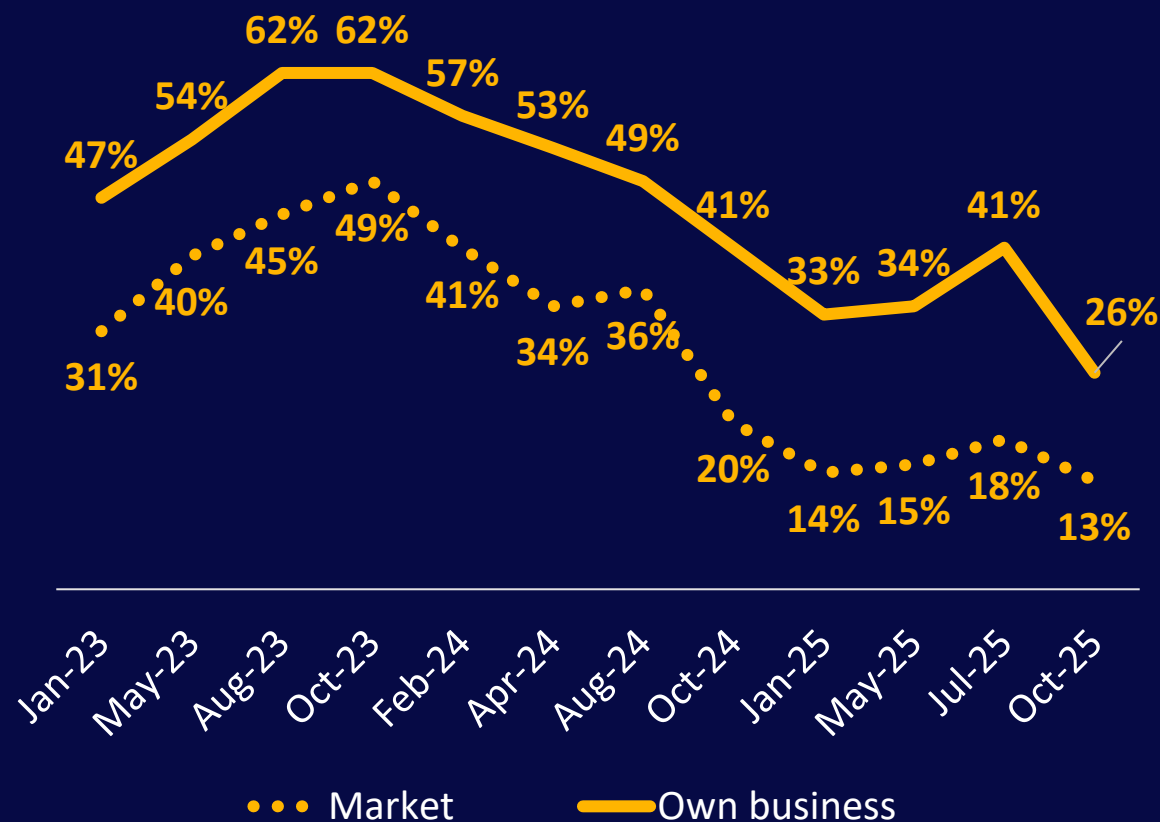
Oct-22
Inflation at a 40-year high

Apr-25
Spring Statement

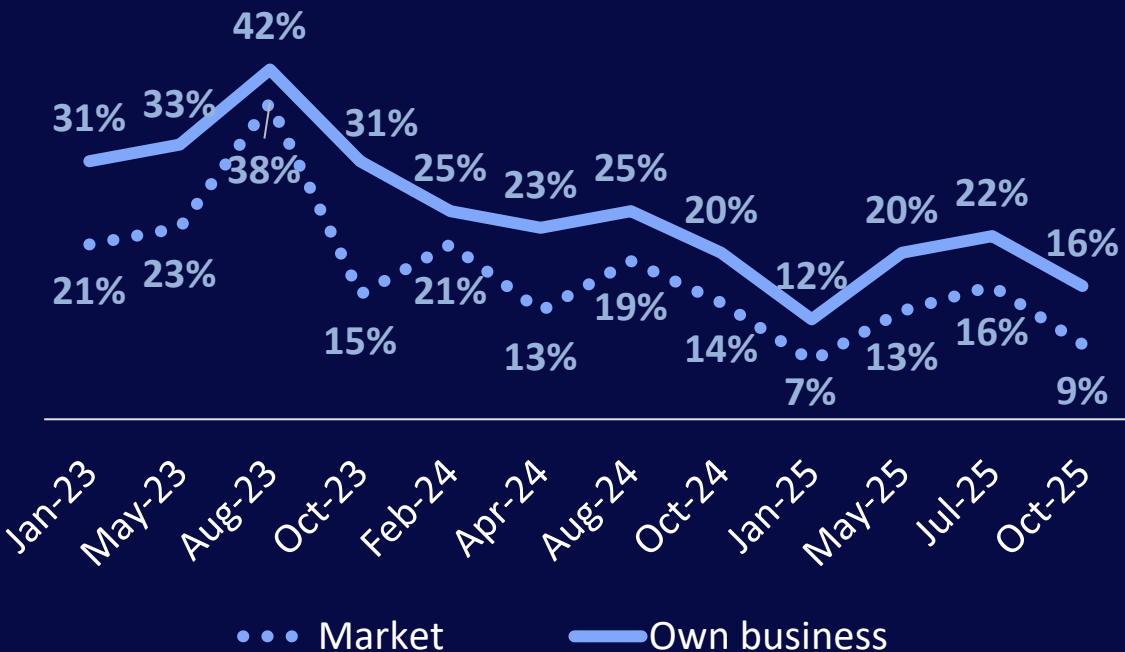
CGA by NIQ, Business Confidence October 2025, in partnership with Sona.

Confidence among independents has also declined on last quarter and is significantly below leaders of larger businesses

Leaders' confidence



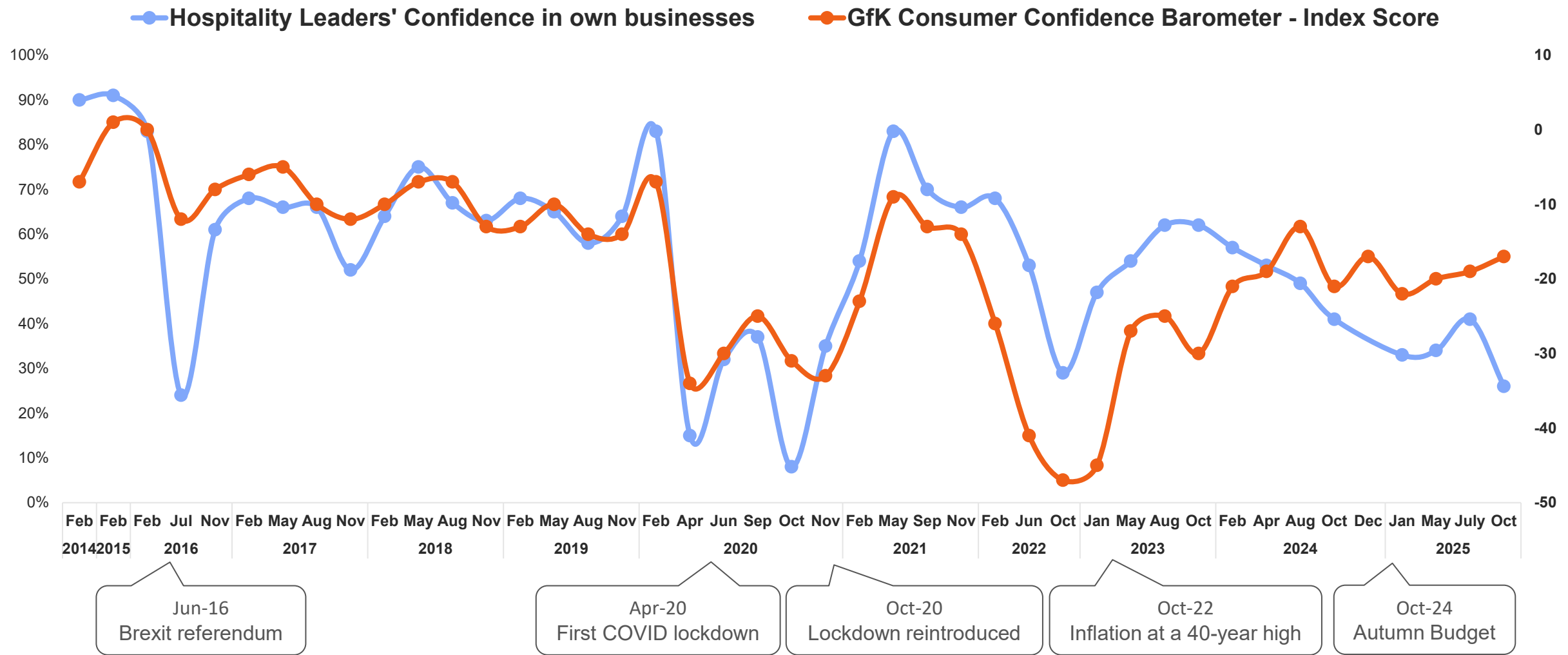
Independents' confidence



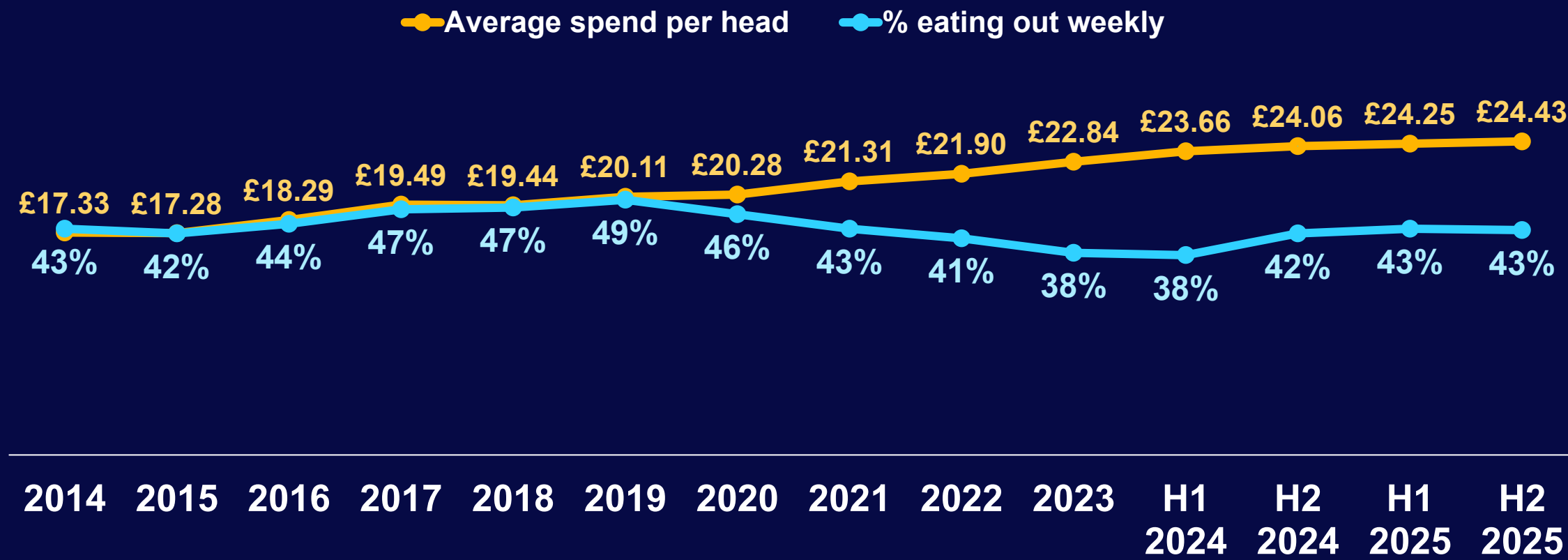
CGA by NIQ, Business Confidence October 2025, in partnership with Sona.



Strengthening savings have led to incremental consumer confidence gains, but pre-budget anticipation caused industry confidence to diverge



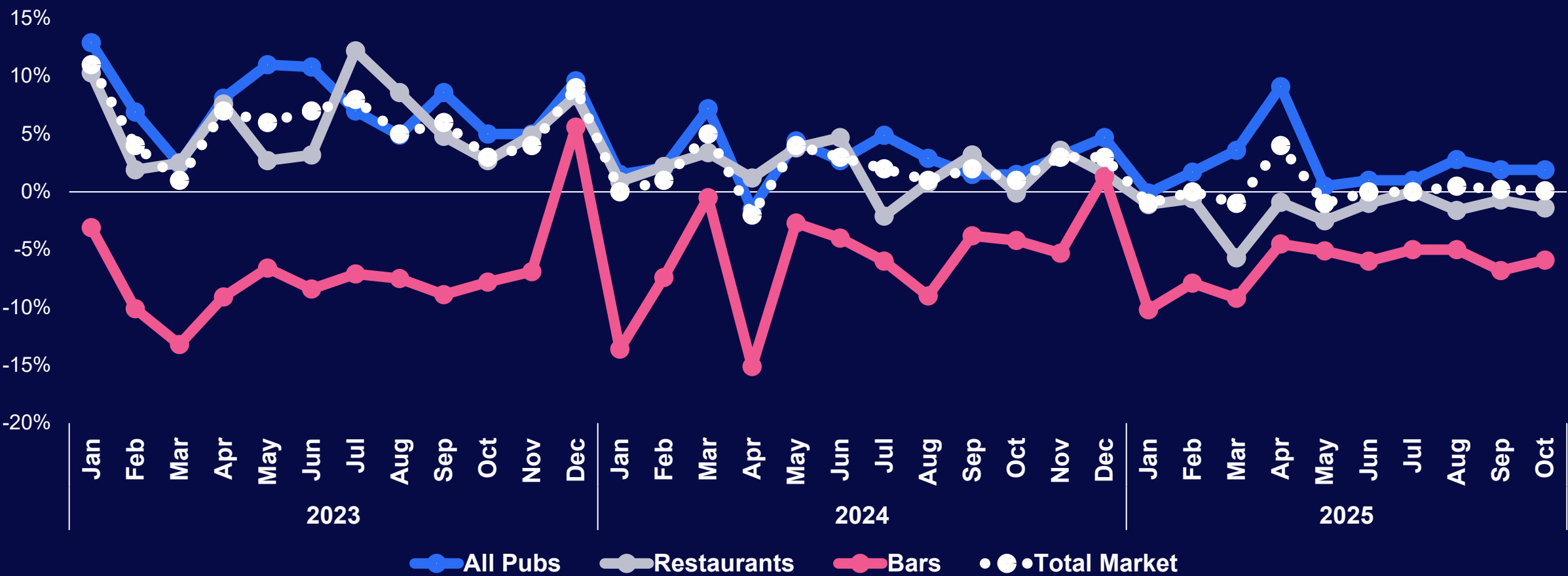
However, there are some encouraging signs that consumer visit frequencies are in revival



CGA by NIQ, BrandTrack survey
Frequency: "How often, if at all, have you eaten out during the past 6 months?"
Spend per head: "When visiting [BRANDS] how much did you spend per head on food and drink combined?"

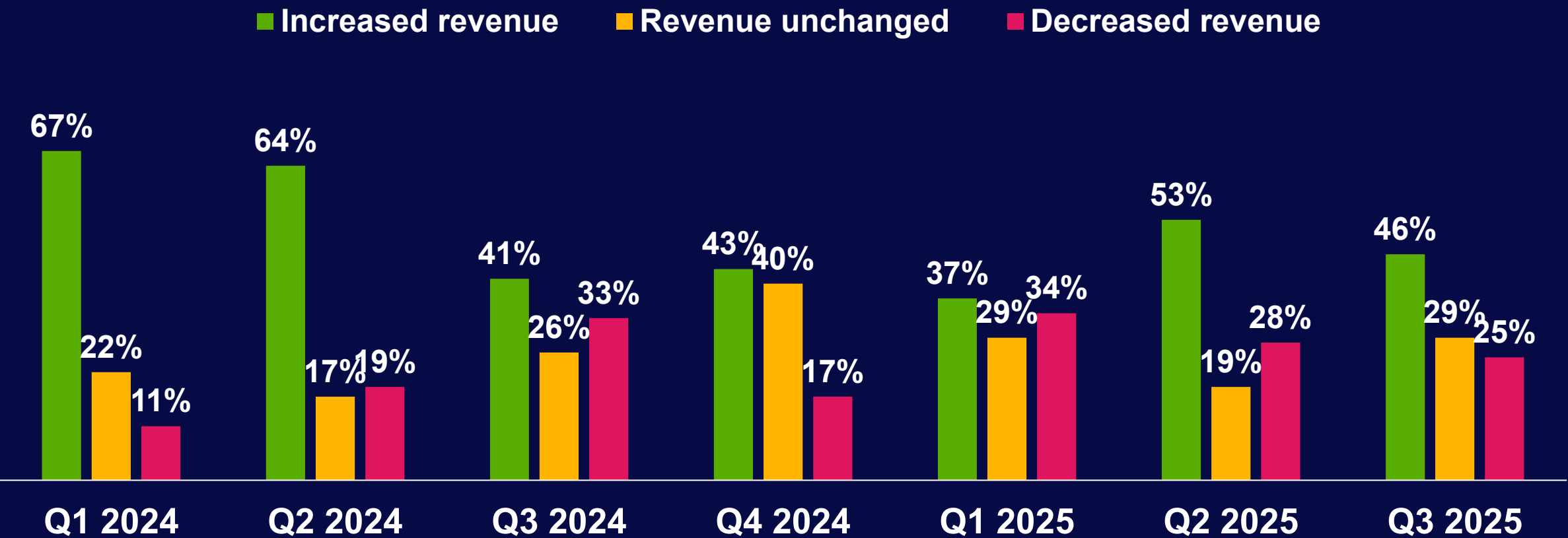
Like for like sales are fairly flat placing further pressures on profit. However new site openings are still powering growth in the managed market

Year-on-year sales growth across like-for-like sites



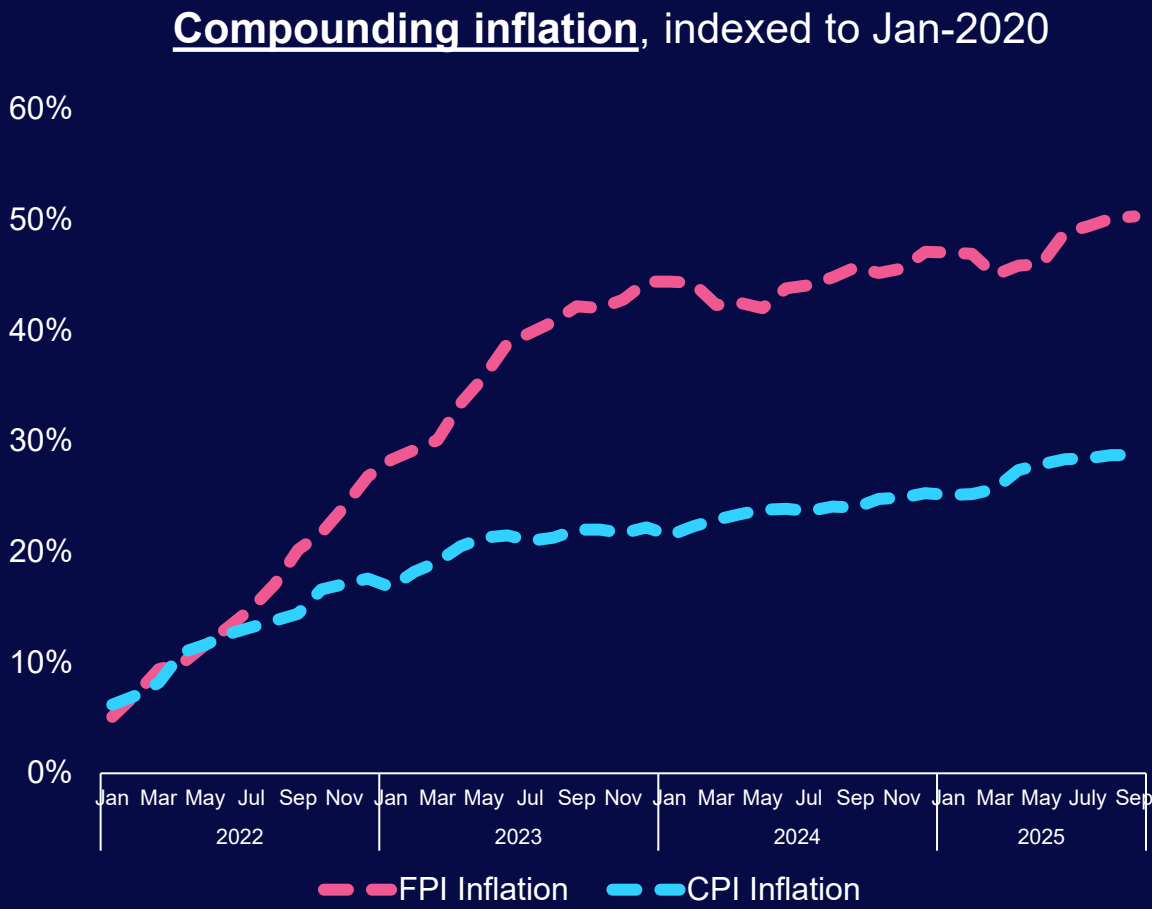
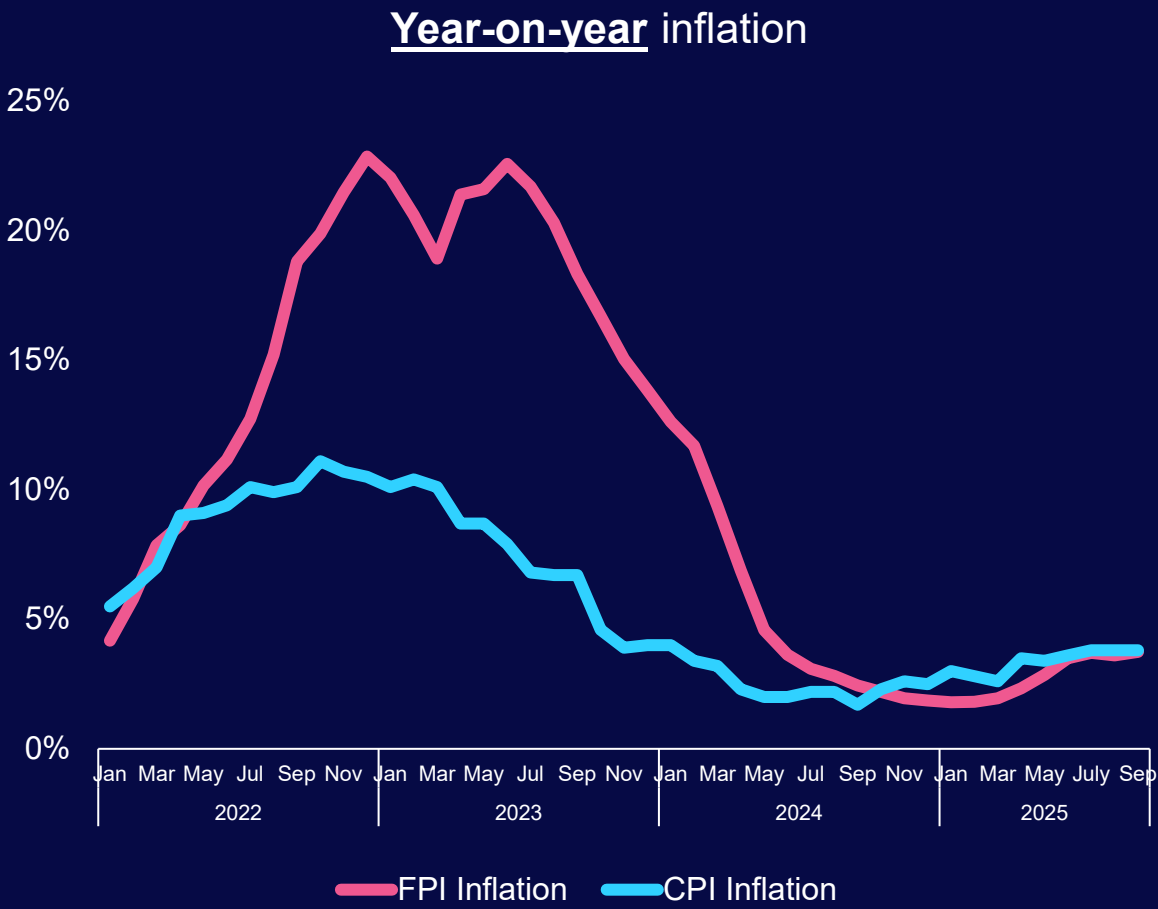
Pressured revenues are reflected in Leaders' survey responses, with a quarter continuing to see year-on-year decline in Q3, but almost half (46%) still seeing growth in consumer spend

How would you describe your business's **REVENUE** performance over the quarter, compared to the same time last year?



CGA by NIQ, Business Confidence October 2025, in partnership with Sona.

Food purchasing prices are now 50% higher than they were in Jan-2020, and FPI has begun to climb once again



CGA and Prestige, Foodservice Price Index

With more limited cash reserves and financing options, independents are resorting to more rapid consumer price increases

Among those who have raised prices... *(weighted by number of sites)*

Leaders have raised prices YoY by an average of

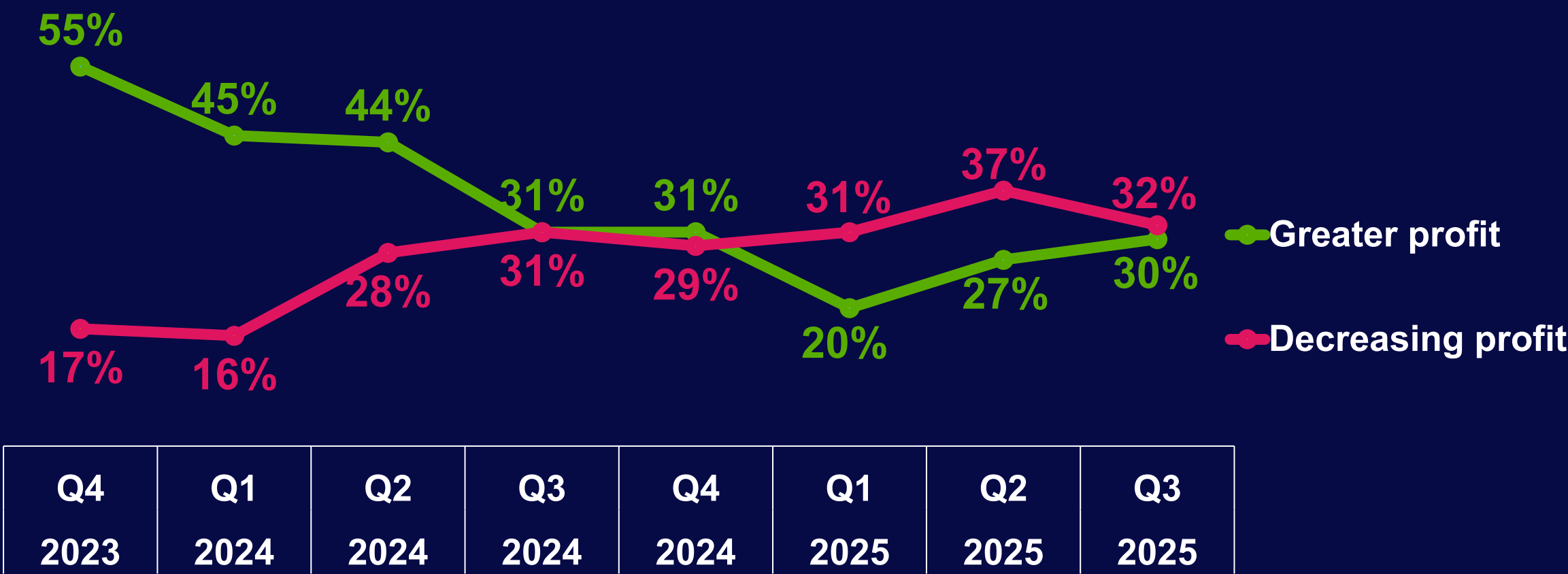
7.6%

Independents have raised prices YoY by an average of

10.7%

With spend under scrutiny, 87% of Leaders are managing to stay in profit, but this is way down versus Q4 of 2023

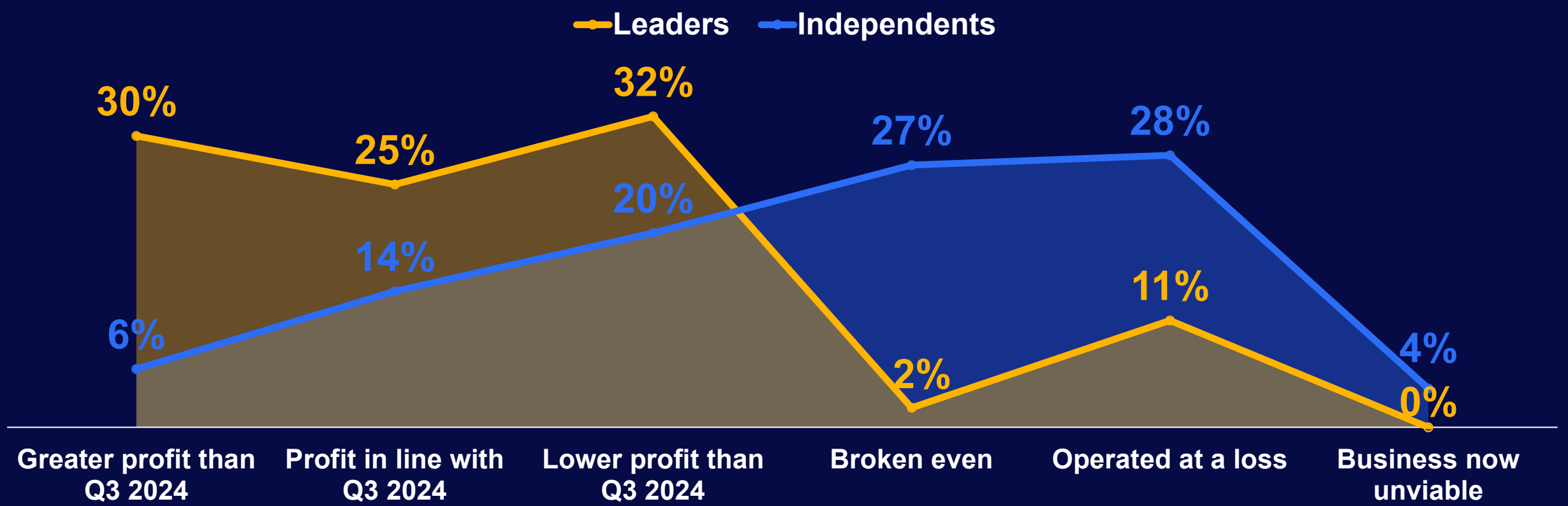
How would you describe your business's **PROFIT** performance over the quarter, compared to the same time last year?



CGA by NIQ, Business Confidence October 2025, in partnership with Sona.

While most Leaders remain profitable the cohort is divided, with a minority (11%) operating at a loss. Independents as a whole have fared much worse, with 59% failing to make profit

How would you describe your business's **PROFIT** performance over the quarter, compared to the same time last year?



CGA by NIQ, Business Confidence October 2025, in partnership with Sona.

Eating and drinking is a crucial part of consumers' lives

73%

I absolutely love eating/drinking out and would be lost without it

23%

I enjoy eating/drinking out and would feel disappointed if I could no longer do it

50%

I like eating/drinking out but could easily not do it

21%

I could very easily stop eating/drinking out and it would have no impact on my life

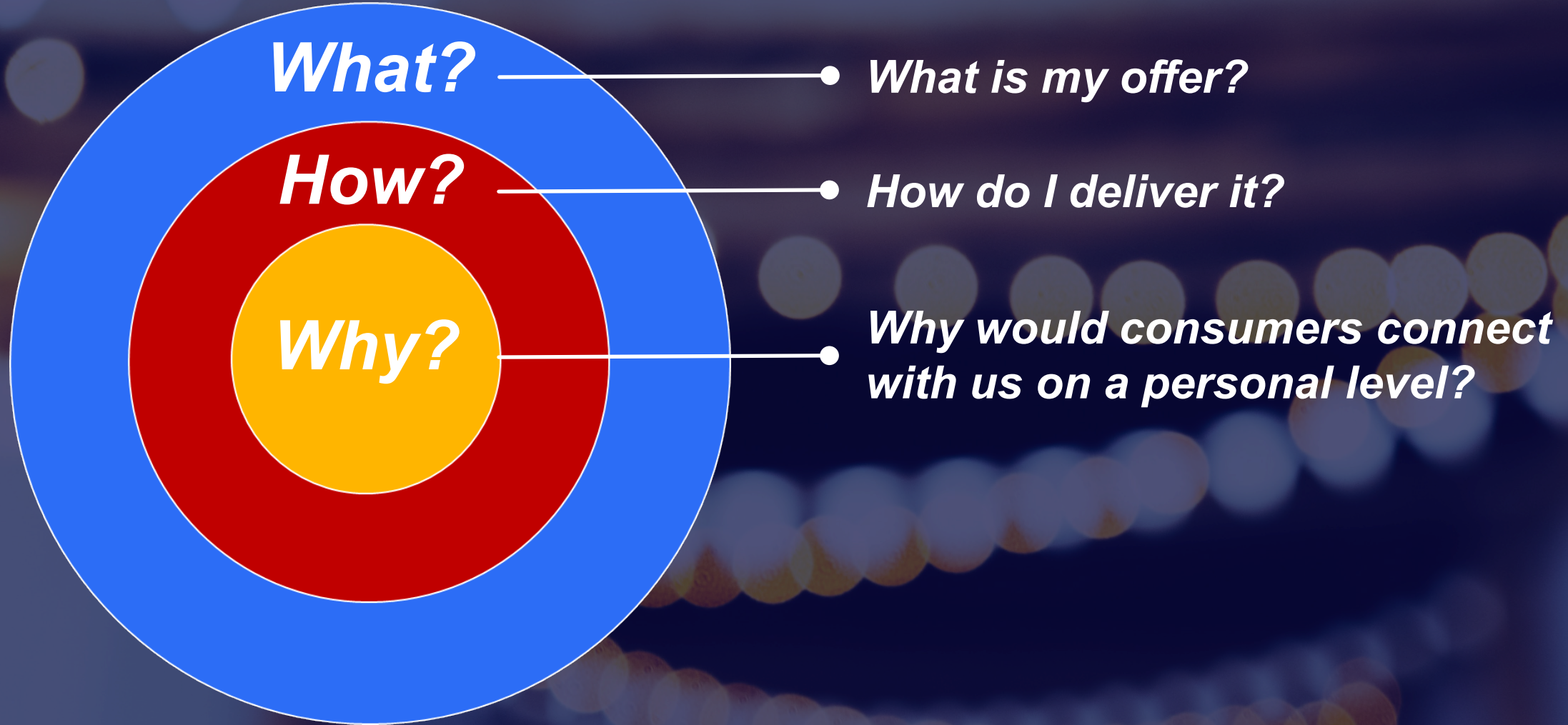
7%



NIQ



So how do operators build connections with consumers?



What is my offer?

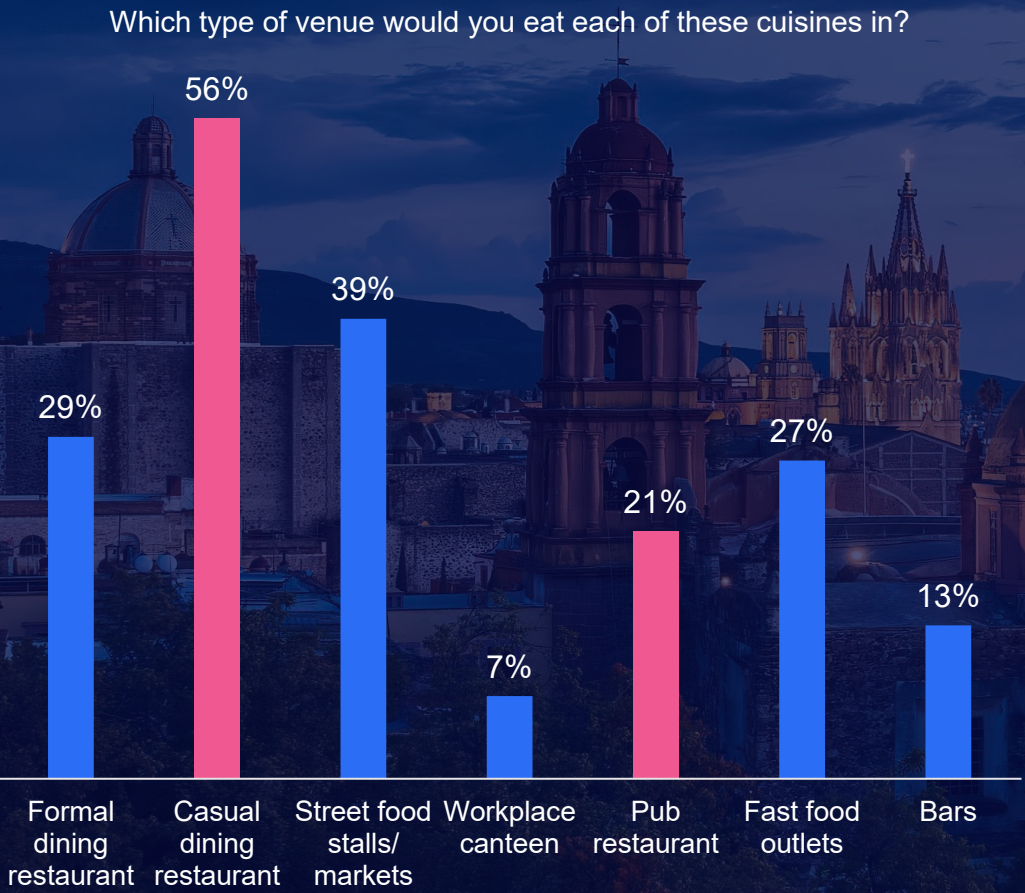
Cuisine type

Space and design

Value for money

Healthy options

Mexican cuisine appeals to over half of GB consumers within the casual dining sector, but there is room for innovation elsewhere



CGA by NIQ, Food Insights Report 2025, Sample: 874; @dominos_uk, @brewskirestaurants



Mainstream pizza operator, Domino's, translates Mexican flavours into their ultimate Chicken Mexicana offering



The team at Brewski adds their own unique twist to Mexican classics with their stuffed crust burritos

TACOS
2 X 4 INCH SOFT FLOUR TORTILLAS TOPPED WITH...

ITALIAN BEEF AND NDUJA

£7.50

Slow cooked italian beef, Nduja, pickled peppers, crispy onions and blacksticks sour cream

DEEP FRIED CAULIFLOWER

£6.50

Deep fried cauliflower, white truffle cheese sauce, chipotle sour cream and pickled chillies

STEAK ELOTE

£8.00

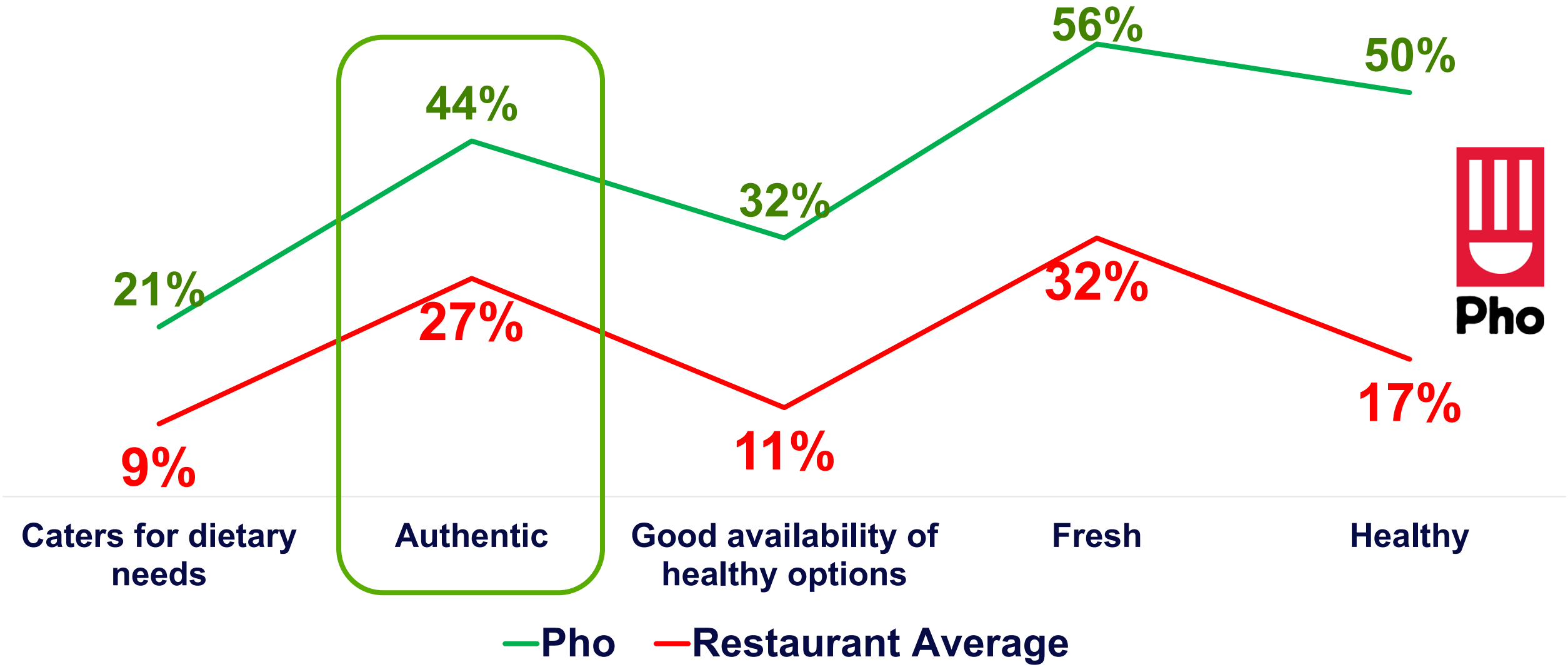
Cheesy bacon and jalapeno corn topped with chargrilled bavette steak, pickled chillies and bacon bits

STUFFED CRUST BURRITOS

ALL WRAPPED IN A 3 CHEESE QUESADILLA AND SERVED WITH FAJITA SEASONED FRIES AND CHIVE RANCH

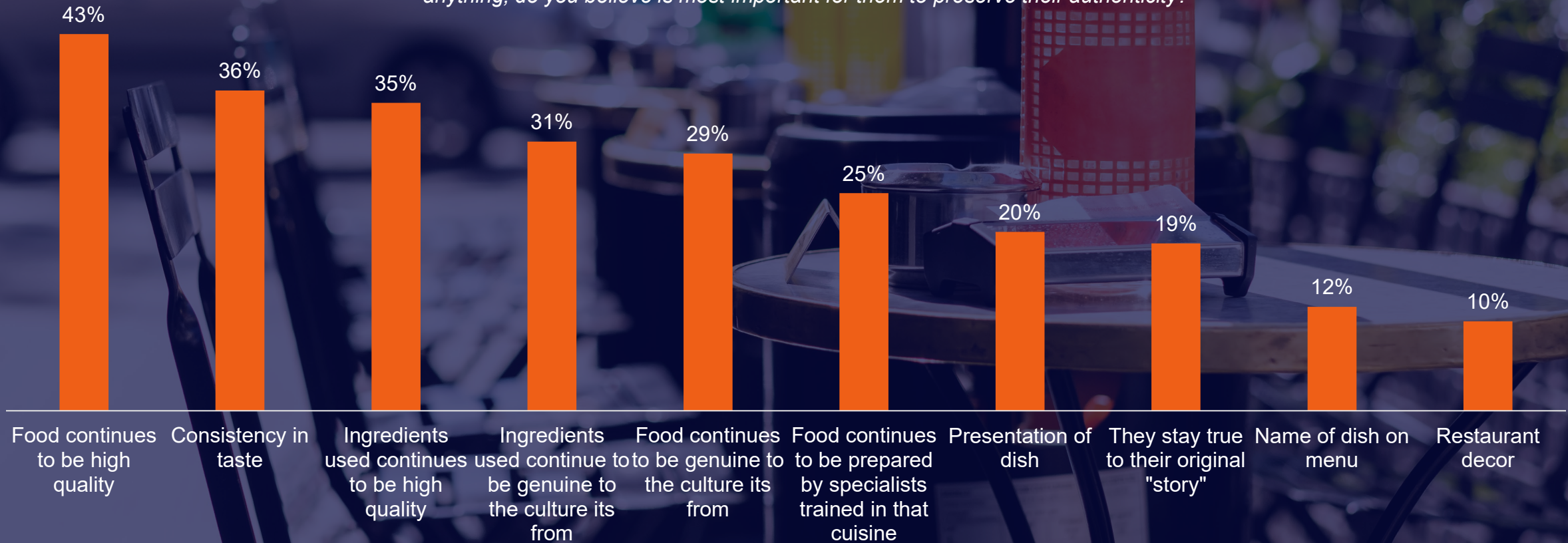
- BREWSKI BURRITO**
£21.50
Slow cooked then deep fried pork belly, iceberg lettuce, cajun onions, crispy beef, hot sauce, pickled red chillies, nduja hot honey, pico de gallo, 3 cheese mix and chipotle sour cream
- FRIED CHICKEN BURRITO**
£20.50
Brewski fried chicken thigh, chipotle sour cream, iceberg lettuce, grilled cajun onions, homemade nachos, chive ranch, red peppers and BBQ sauce

Pho has clear USPs such as “fresh” and “healthy” but authenticity is at the heart of consumer drivers to the brand



For larger restaurant chains, ingredients used from the country of origin are important, but consistency and quality are of more slightly more significance

Thinking about chain restaurants (large restaurant groups, typically 5+ sites), what, if anything, do you believe is most important for them to preserve their authenticity?



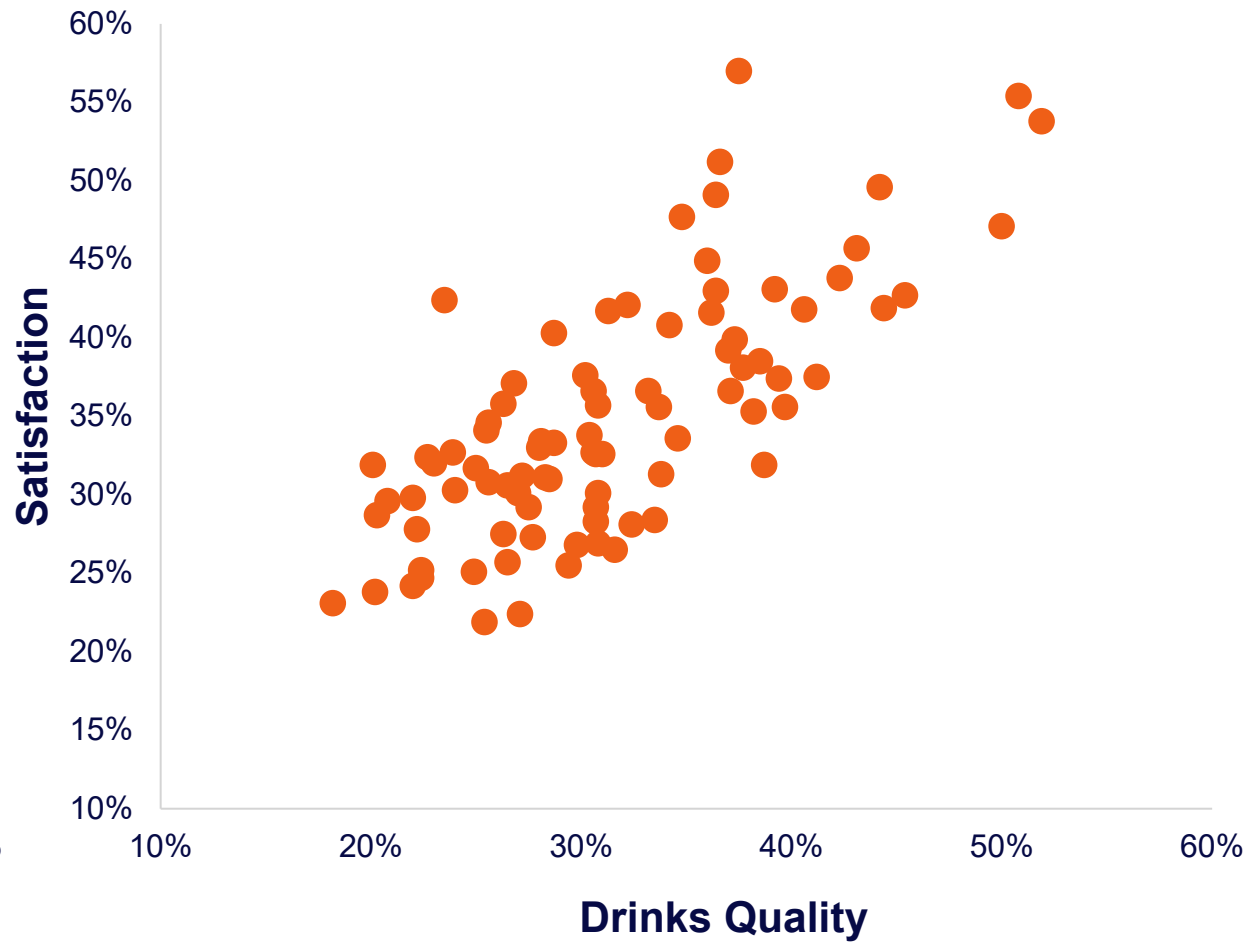
CGA by NIQ, Food Insights Report 2025, Sample Size: 1999

Quality fundamentally underpins visit satisfaction

Food quality vs Satisfaction

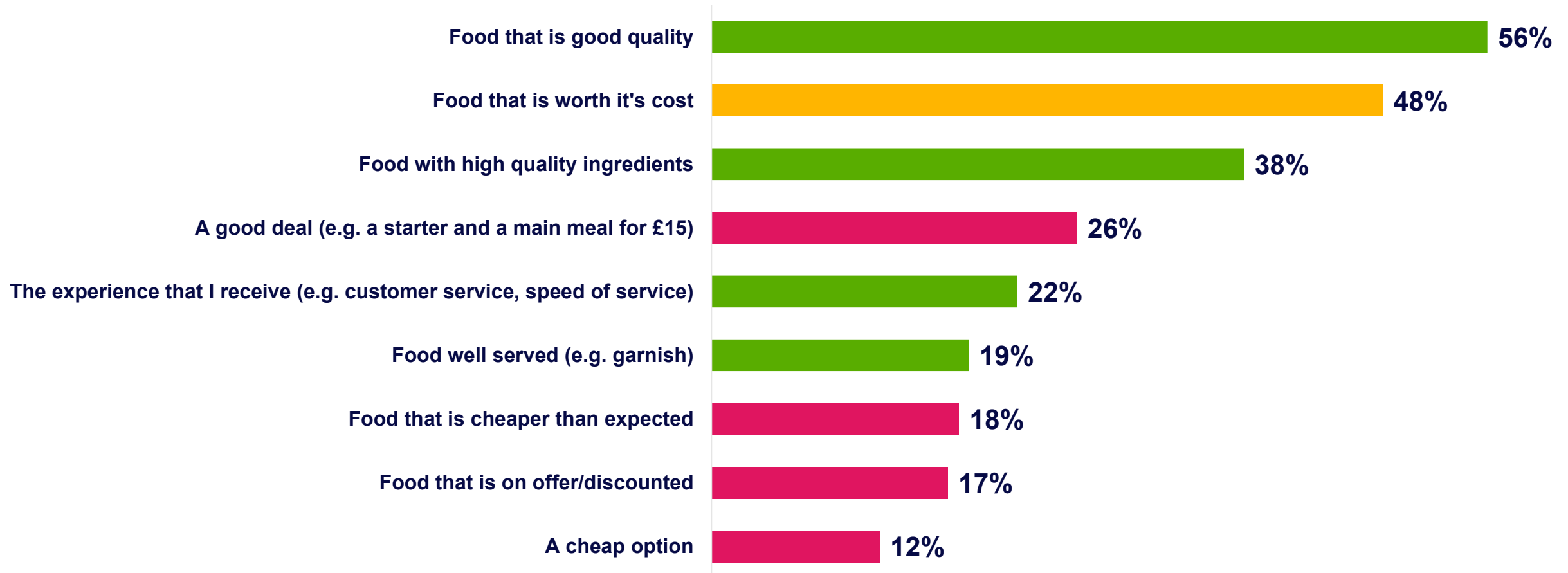


Drinks quality vs Satisfaction

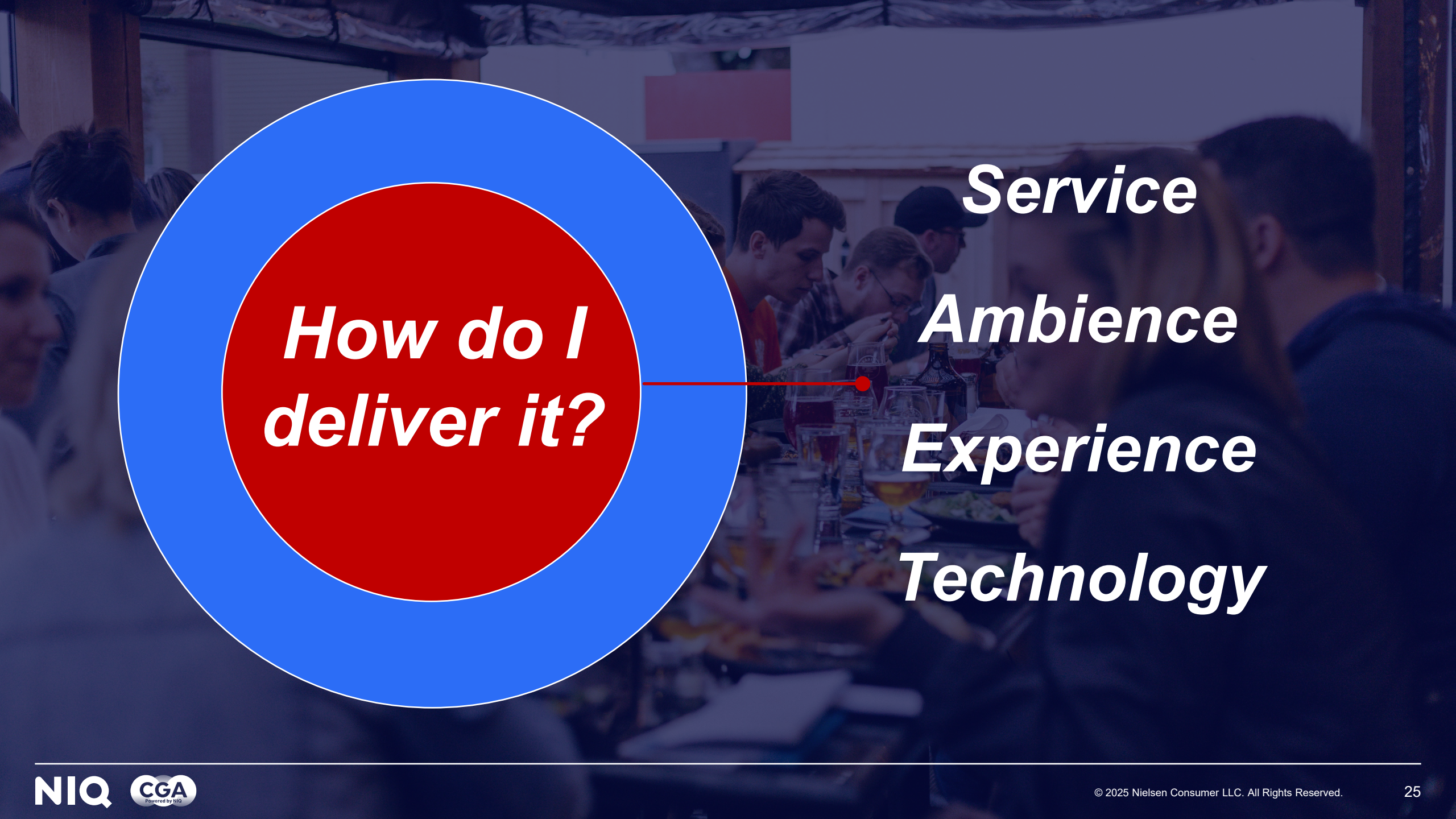


When determining food-led value for money **quality** trumps **cost**

Based on what I spend when I eat out, good value for money is...



BrandTrack August 2025. Sample size: 3,230



***How do I
deliver it?***

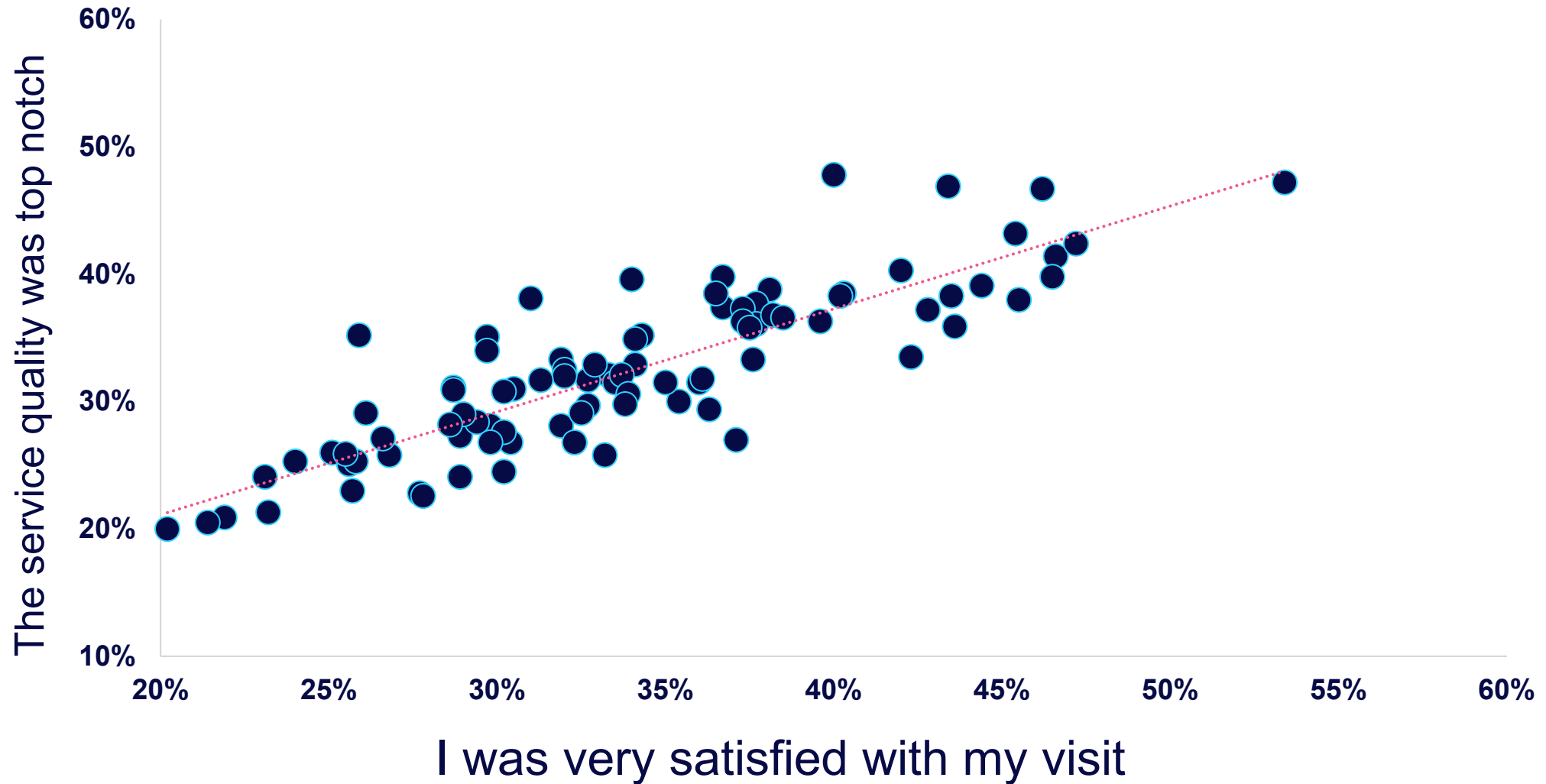
Service

Ambience

Experience

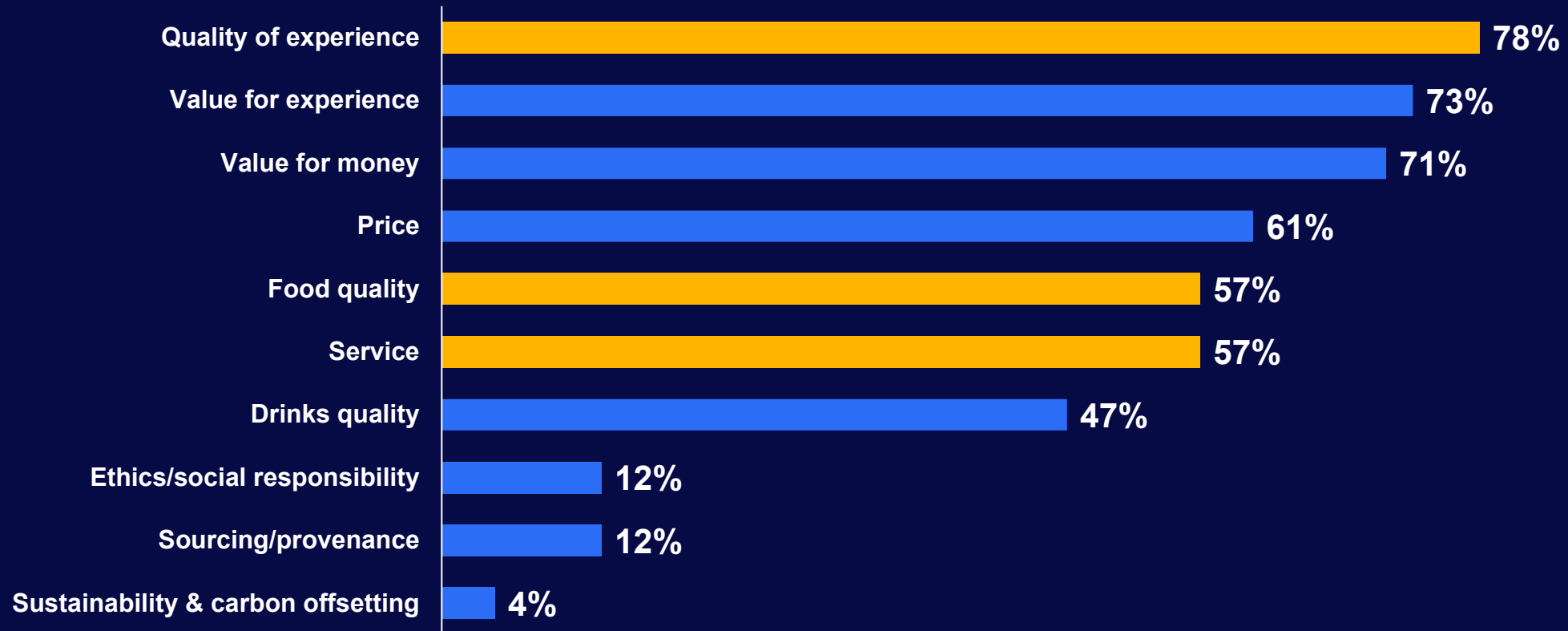
Technology

Service quality vs overall satisfaction



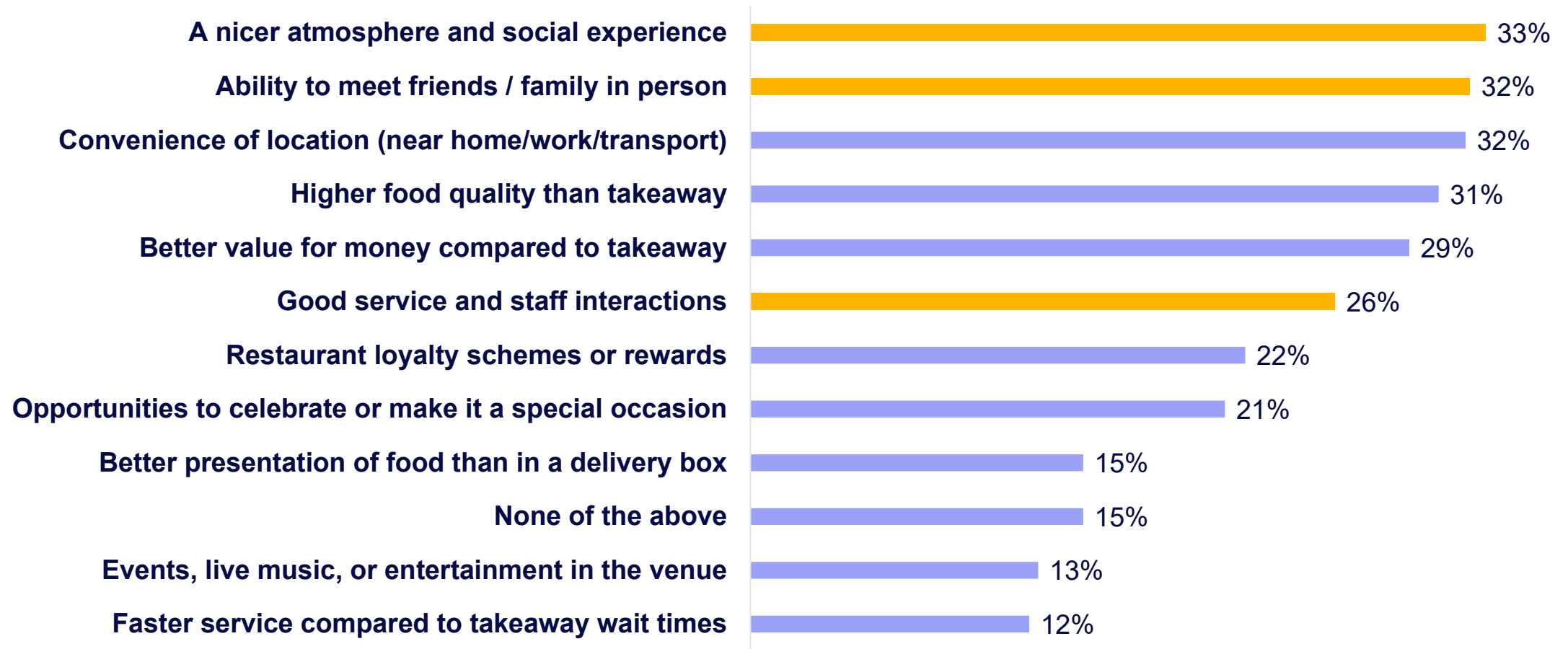
Throughout 2025 Leaders have placed an equal focus on food quality and service, but above all prioritised a holistic approach to quality of experience

Which of the following do you see as key drivers for consumers when they choose where to eat and drink out in 2025?



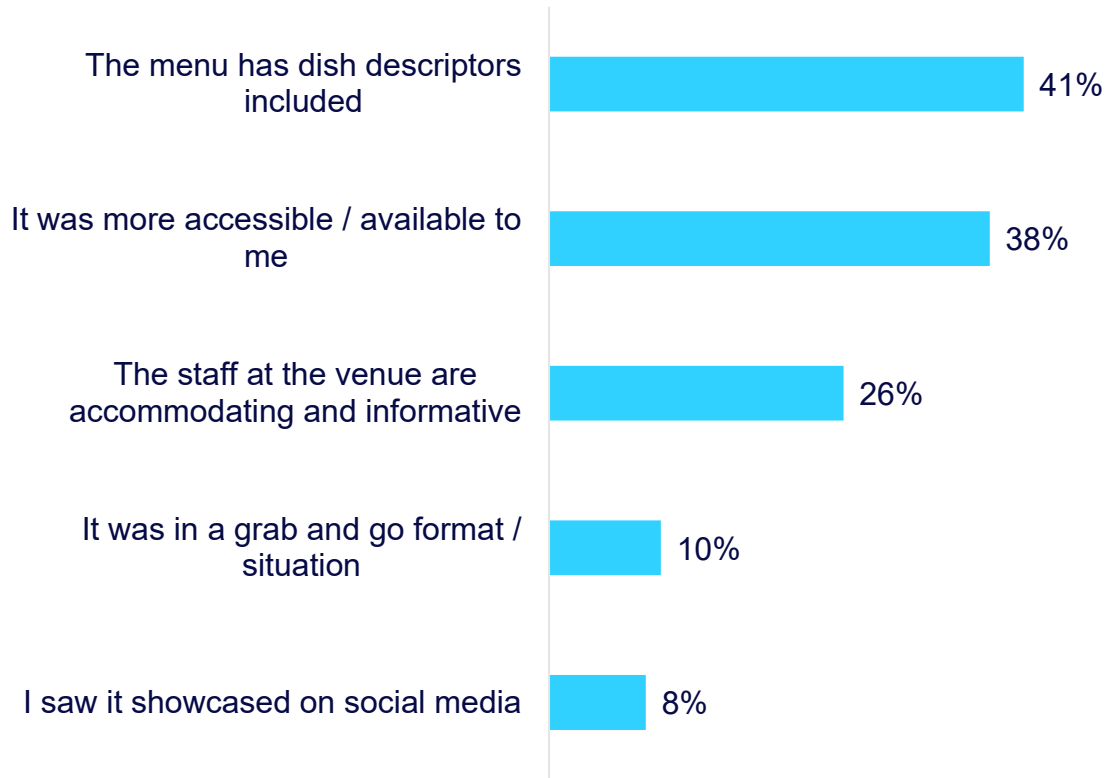
The social experience and communal nature of hospitality, between both visiting customers and staff, are all reasons to visit in person

Which of these options would encourage you to visit restaurants instead of ordering online?



Educating consumers is key to driving engagement with innovative dishes especially through menu descriptors and informative staff

I would be more likely to try an innovative dish/food /meal in the next 12-18 months if...

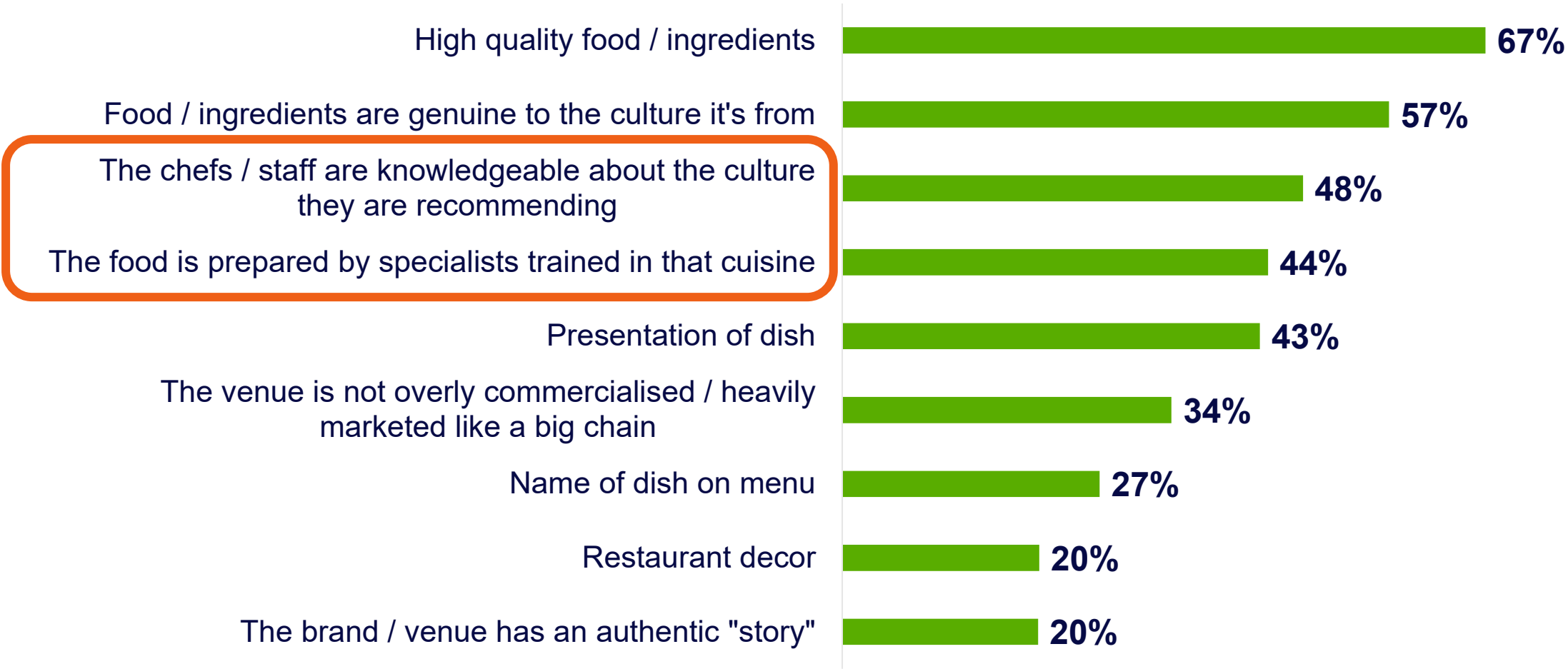


CGA by NIQ, Food Insights Report 2025, Sample Size: 844



Quality and authenticity are interlinked. For consumers, authenticity is also underpinned by a knowledgeable and specialist workforce

What elements of authenticity are most important to you?



Staff skill

“Welcome to Cook the Book, our brand new series where our Chefs bring the pages of the Dishoom cookbook to life.

Beyond eating

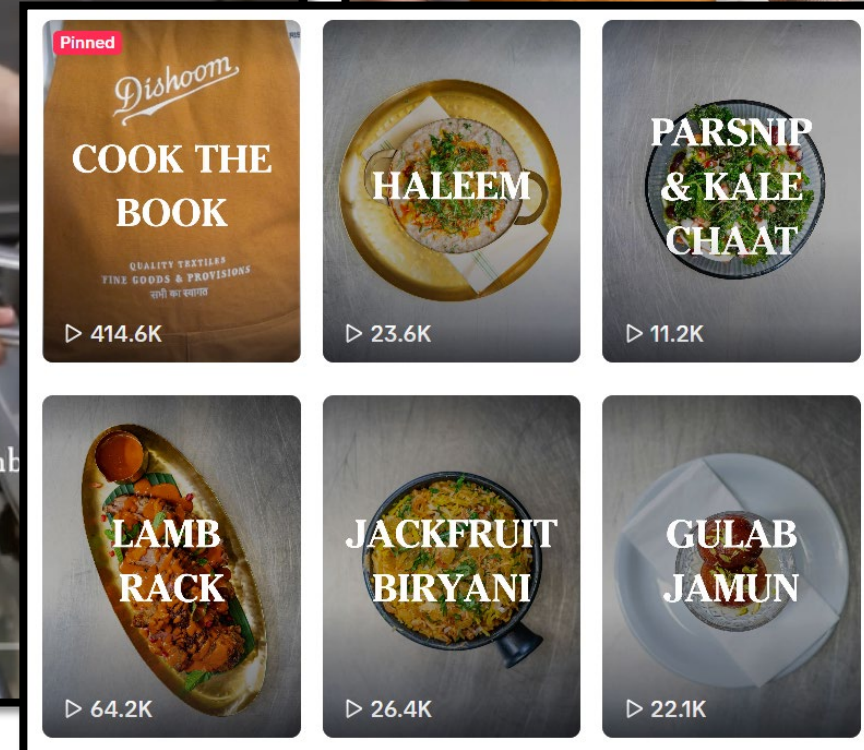
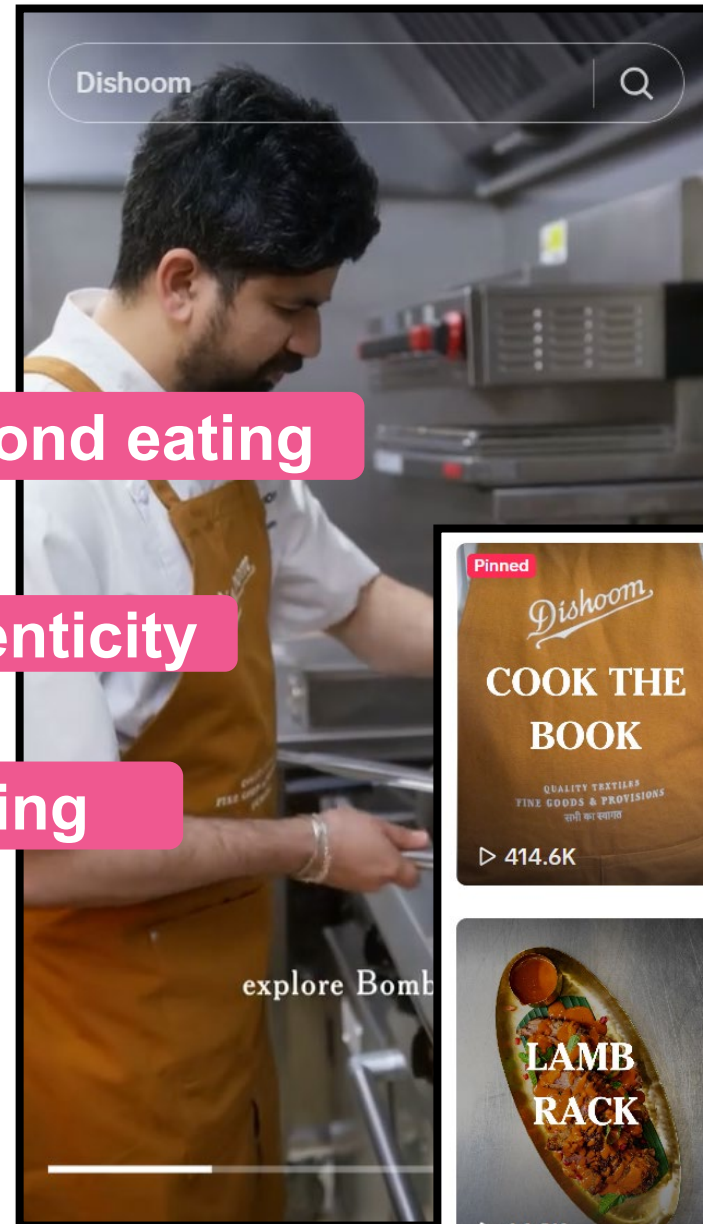
Join us as we explore Bombay's beloved classics from Pau Bhaji to Vada Pau.

Authenticity

Storytelling

Expect bold flavours, vibrant tales, and a whole lot of heart in every dish.”

Emotional connection

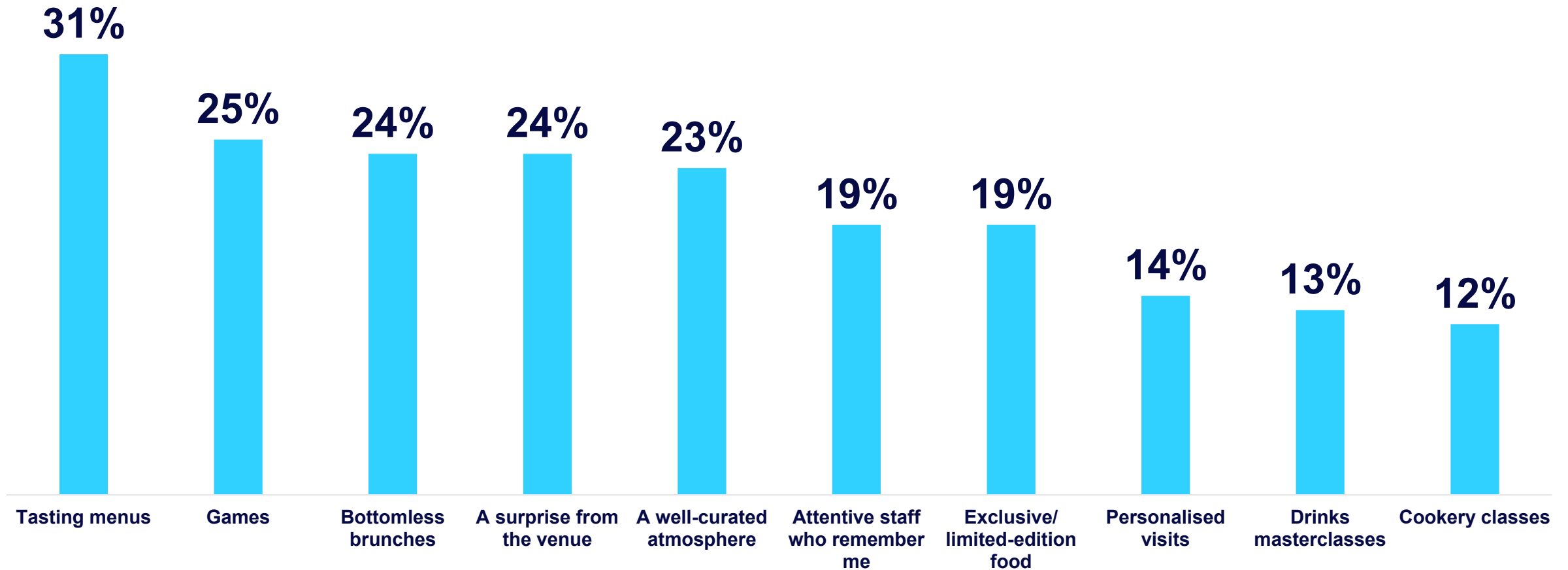


74%

**of consumers say
they would visit a
venue for an
'elevated
experience'**

Activities, engagement, and a sense of community can all connect with consumers in a way that food and drink alone cannot

Top 10 elevated experiences consumers would visit a venue for



Lost and Found with bespoke events



Saturday



26th Jul

£40 per person

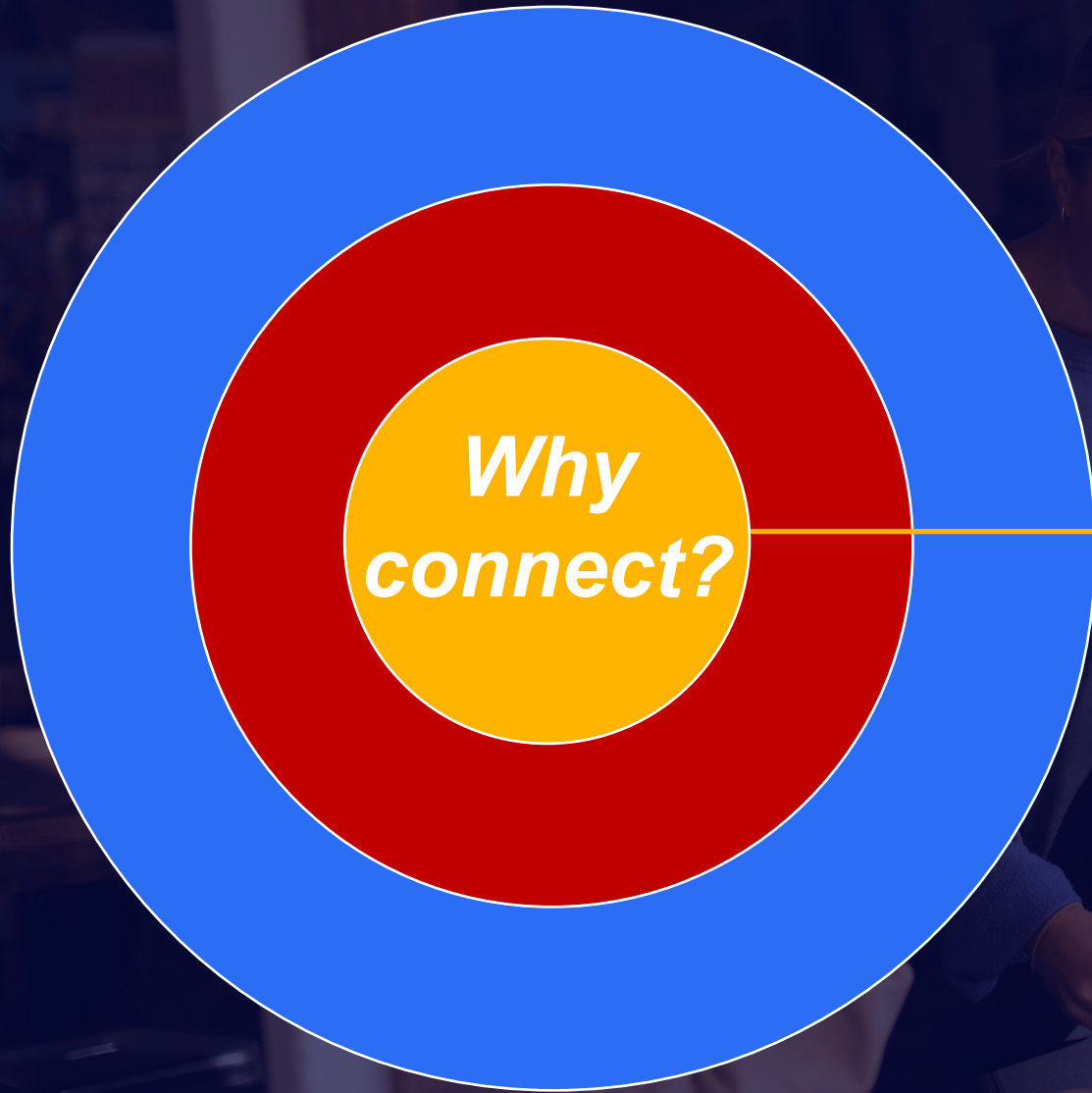
DON'T BRUNCH BACK IN ANGER!

Britpop 90's Brunch - for those of you that didn't manage to get Oasis...

No Children Allowed

[BOOK NOW](#)

[Read More →](#)



Local community

Sustainability

Emotional connection

Staff treatment

Ethics

Consumers love the industry for its direct and indirect contribution to their lives

71%

Say that sustainability is important to them when choosing a venue to visit

69%

Hospitality venues play an important role in my community

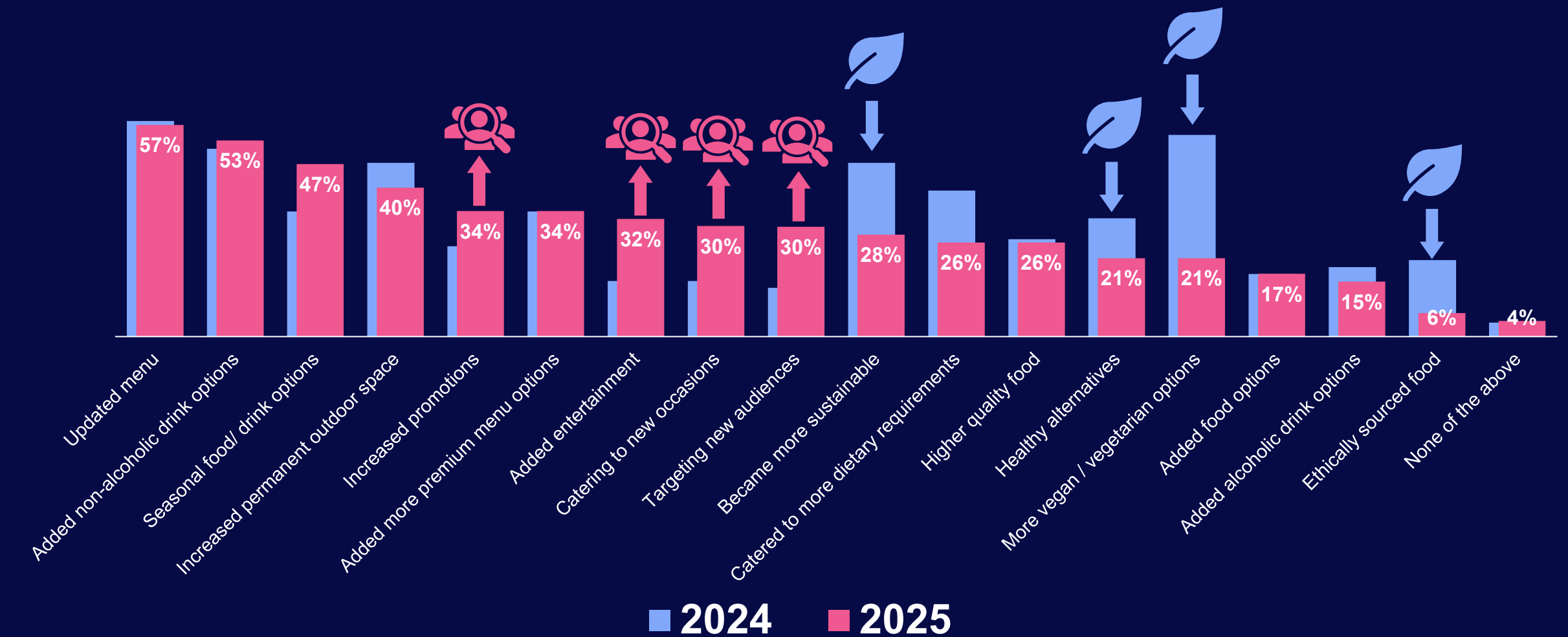
72%

The hospitality industry is a good local employer

Go Technology, The Social Value of Hospitality, Zonal, UKHospitality, and CGA. Sample size:5,000. And GB Opus, Jan 2024. Sample size: 4,996

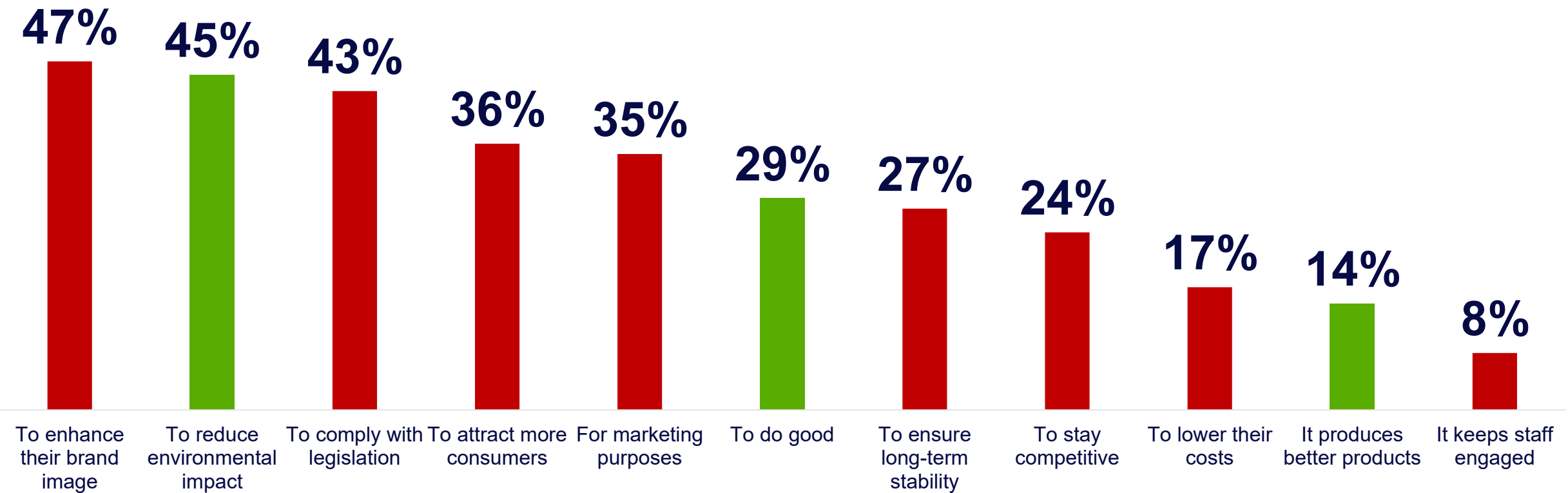
New opportunity and audience expansion are taking the investment focus away from sustainability with squeezed margins

Have you made any enhancements or changes to your offer in the last two years?



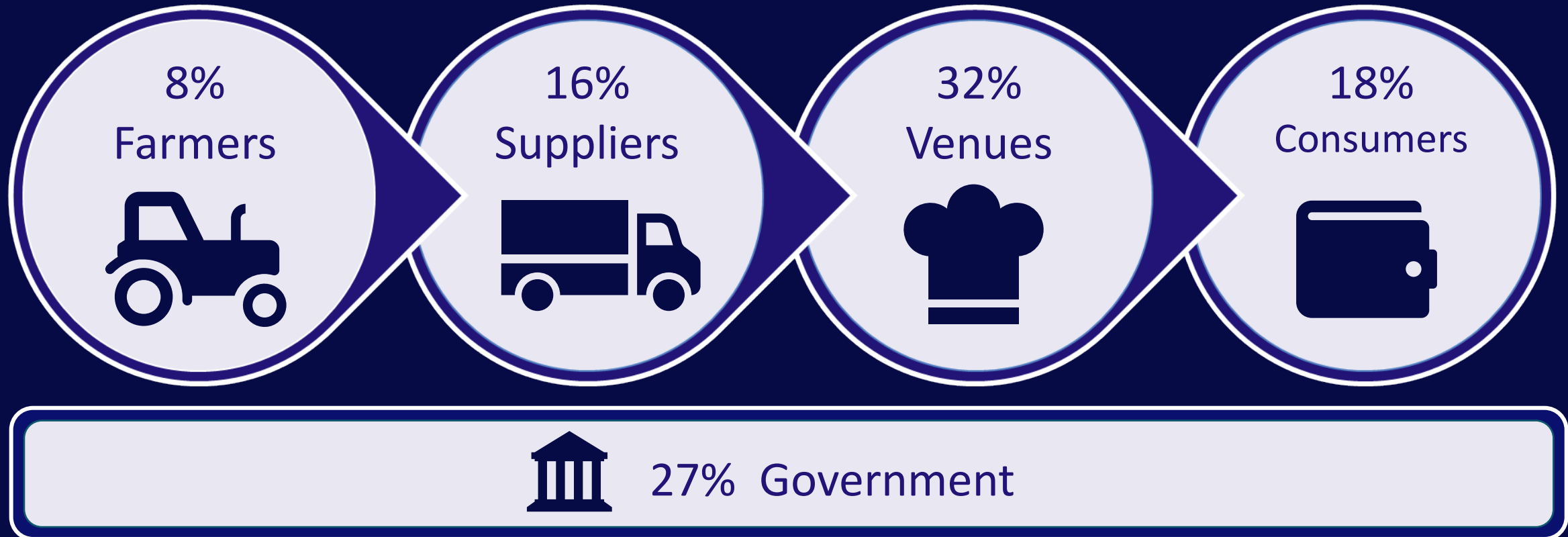
While most consumers agree the goal of sustainability is to reduce environmental impact, far fewer believe in the other more altruistic aspects

Why do you think businesses invest in sustainability?



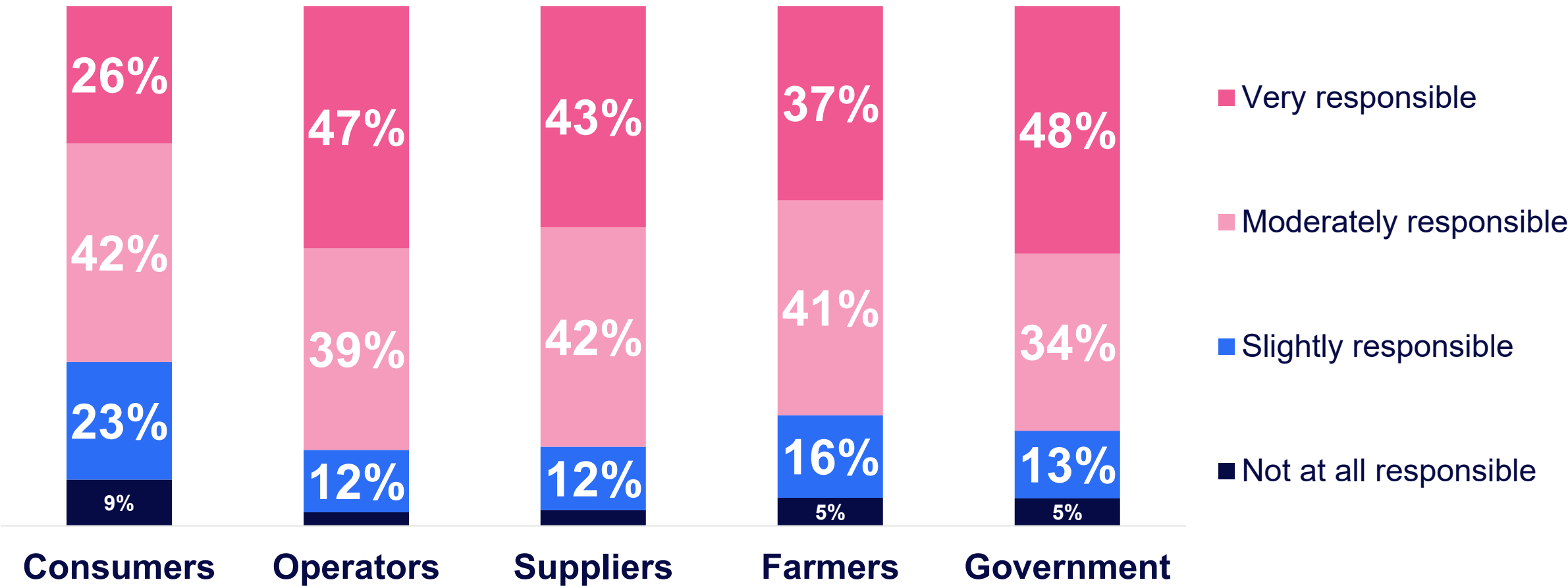
In 2024, consumers identified venues as being most responsible for ensuring sustainability

Who do you think is most responsible for ensuring that eating and drinking out of home is sustainable?



But digging deeper in 2025 shows that while operators are viewed as most responsible, the burden is widely shared. Though, slightly more consumers wish to excuse themselves

To what extent are each of the following responsible for ensuring sustainability out-of-home?

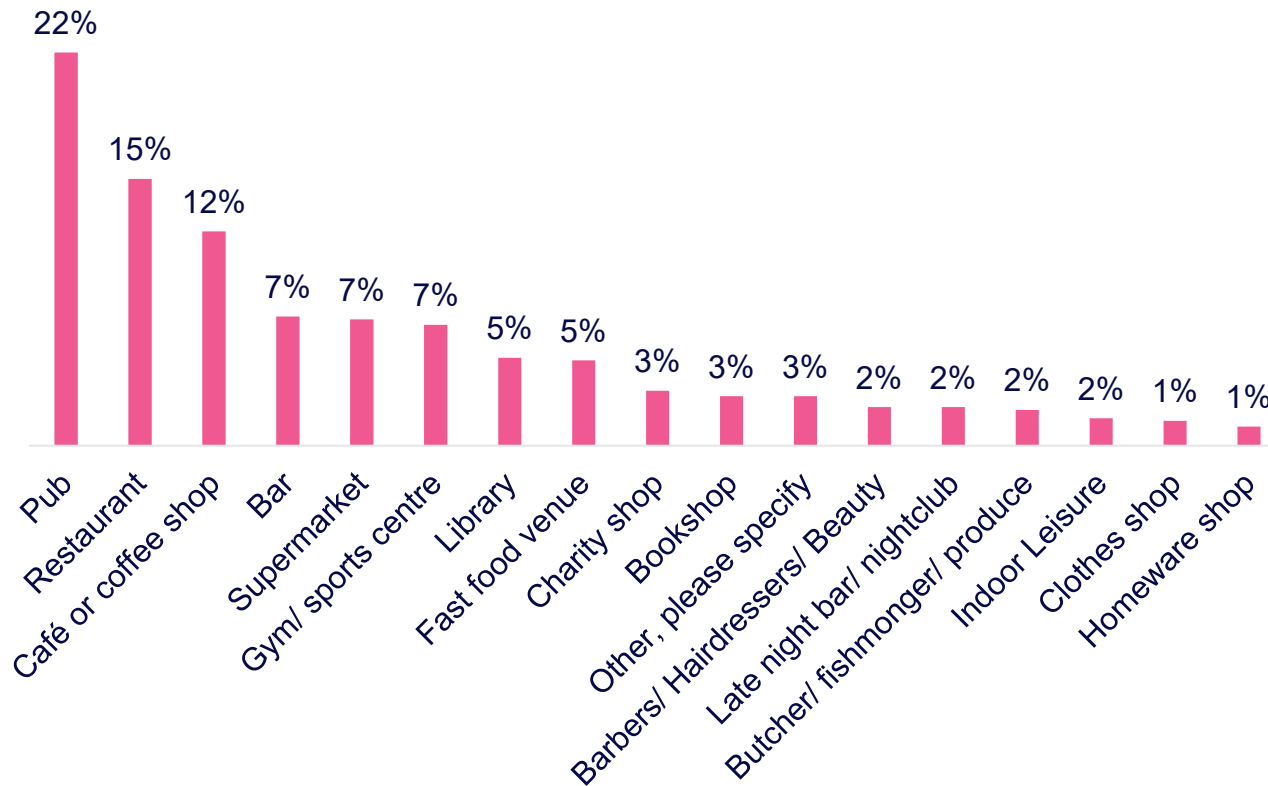


64%
of consumers have a
favourite local venue
that holds special
significance to them

Go Technology, The Social Value of Hospitality, Zonal, UKHospitality, and CGA. Sample size:5,000



Do you have a favourite local venue that holds special significance to you? If so, what type of venue is it?



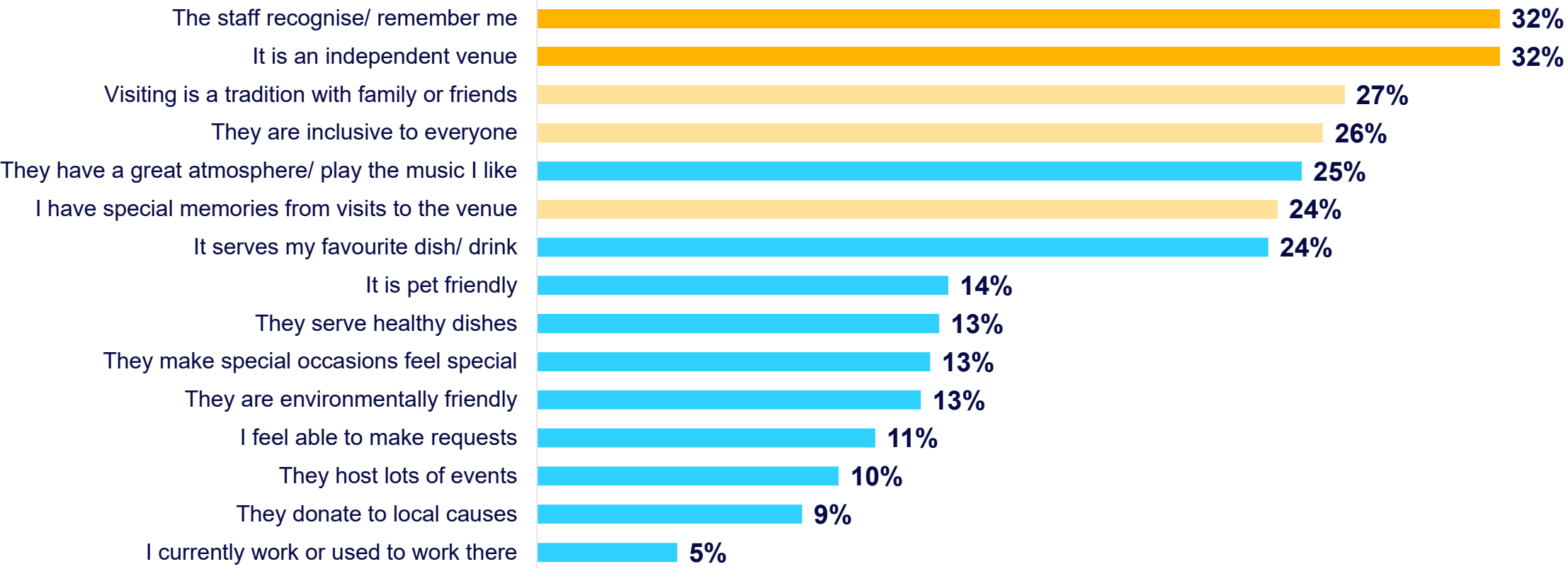
Among only those
who have a favourite
venue

66%

**of consumers say it is
in hospitality**

There are two standout drivers of special connections in venues, being remembered and being independent, both demonstrating close ties to the community. Traditions, memories, and inclusivity occupy strong secondary factors

You said your favourite local venue is in hospitality. What makes it feel special?



Go Technology, The Social Value of Hospitality, Zonal, UKHospitality, and CGA. Sample size:2,054



COW & SOW

The Master Butcher

Welcome Gift: Cow & Sow branded hoody plus a set of two branded Cow & Sow wine glasses (worth £70 in total),

Spin the wheel on sign-up and after every visit to **guarantee a gift for you next visit.** Win desserts, sides, drinks, vouchers & more (worth £5–£130)

Includes everything in The Apprentice Butcher, plus:

Monthly **complimentary sharing steak** of the month with two sides and two sauces (worth up to £130)

Monthly **complimentary bottle of Cow & Sow Malbec** (worth £42)

Birthday bottle of Hennes English Sparkling Wine

Priority reservations via WhatsApp Concierge and **fast-track booking** link

Invitations to exclusive **member-only tastings** and feedback events

Spend £5,000 and receive a **luxury Jo Malone gift**

Tapping into personal passions from music...

HOME

TEA & COFFEE

ALCOHOL & NO/LOW

DJS

Ōdiobā

Artisan coffee shop by day
Listening bar by night

...to art

Blow Water Cafe

About

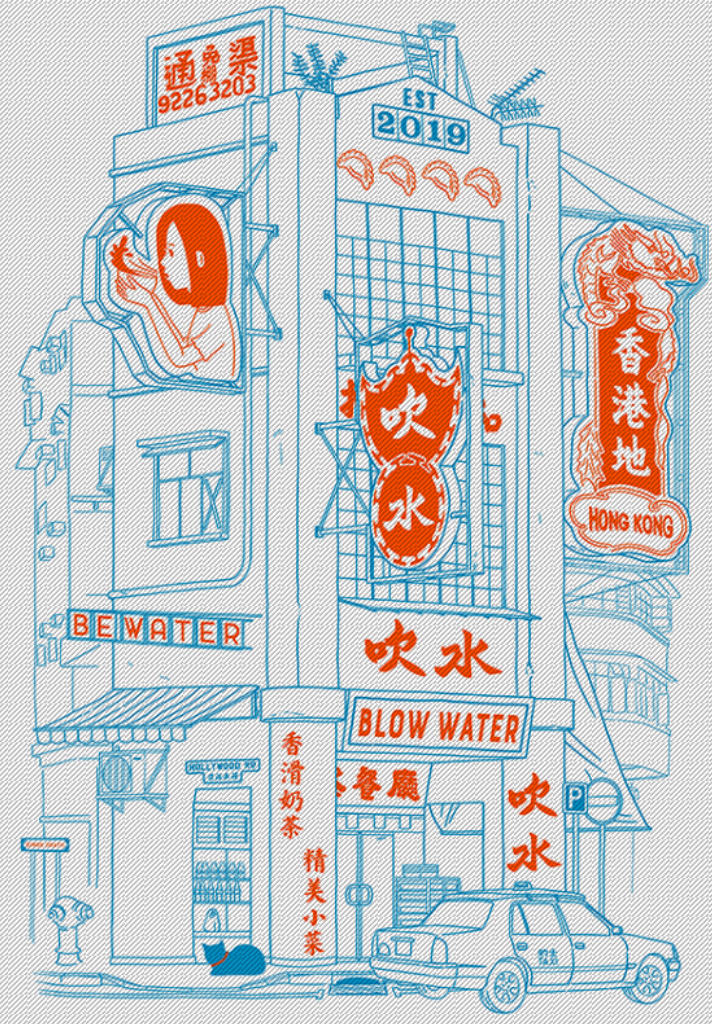
Blow Water Cafe is a Hong Kong inspired eatery and arts space. We are dedicated to Hong Kong Culture, connecting the far East with Birmingham through the arts and food.

A female-led enterprise, Blow Water builds a cultural bridge to introduce people to the spirit of Hong Kong through authentic cuisine and creative events. Blow Water was founded in 2019 by Sabrina, born and raised in Hong Kong. Moving to England for studying BSc Event Management with Arts and Entertainment in 2013. Following her passion of culture then MA Creative Industries and Cultural Policy at Birmingham City University, she saw a gap for healthy and authentic East Asian food in the suburban community.

Hosting Hong Kong supper clubs with a western twist, Blow Water collaborates with creatives, encouraging people to celebrate social diversity together. We are aiming to create a platform involving East Asian and female-led organisations.

blowwater.co@gmail.com

4B Heathfield Road, Kings Heath, Birmingham B14 7DB



Delight and something extra plays a key role in building emotional connection

At Flat Iron steak restaurants, a cleaver-shaped token is given to diners at the end of their meal, which can be redeemed at anytime for a complimentary ice cream or kept as a keepsake.



Hickory's Smokehouse restaurants offer complimentary popcorn to guests, sometimes even upon arrival. Additionally, Hickory's restaurants have movie rooms where children can enjoy fresh popcorn while watching films.

Hickory's
Smokehouse

#1

Child-friendly
restaurant



SWAP A TOY FOR PIZZA

We're teaming up with **Cash For Kids** again this Christmas to help bring some festive joy to kids in need.

Bring a new and unwrapped toy for children ages 4-17 into any Rudy's pizzeria between **12pm-5pm** on **Monday 1st December – Thursday 4th December** and you can enjoy a pizza on us when you hand over your toy.

One toy = one free pizza. Toys must be a minimum value of £10*.

Market dynamics and connecting with consumers

- The market is fairly flat from a sales and venue perspective but is still under significant cost pressures
- Business confidence is low and there are a lot of concerns post-budget
- Consumers still love hospitality it is a sector that enhances people's lives
- Building true connections and delighting consumers is the way to drive loyalty
- The food, the offer, value of money, design all have to be right
- However, how that proposition is delivered is critical with knowledgeable staff, events and the right use of technology all playing a role
- Finally, focus on the "why". Building personal connections through targeted messages, tapping into passions, delivering delightful moments and being at the core of communities. Please do not forget the planet which also connects to many people's core values

Thank you

To learn more or to speak to a member of the team,
please feel free to get in touch:



Karl Chessell

Director

karl.chessell@nielseniq.com



NIQ



FOOD & DRINK INFLATION 2025 PERFORMANCE & OUTLOOK FOR 2026

SHAUN ALLEN
CEO



SUPPLY MARKET IS GLOBAL PRICING IS GLOBAL



58%
UK



24%
EU



18%
ROW



42%
**TOTAL
IMPORT**

2024 SUMMARY

FPI & CPI YOY INFLATION

FPI

5.3%

2024 YoY AVERAGE

2.9%

2025 YoY AVERAGE
(YTD)

CPI

2.7%

2024 YoY AVERAGE

4.2%

2025 YoY AVERAGE (YTD)

3.8%

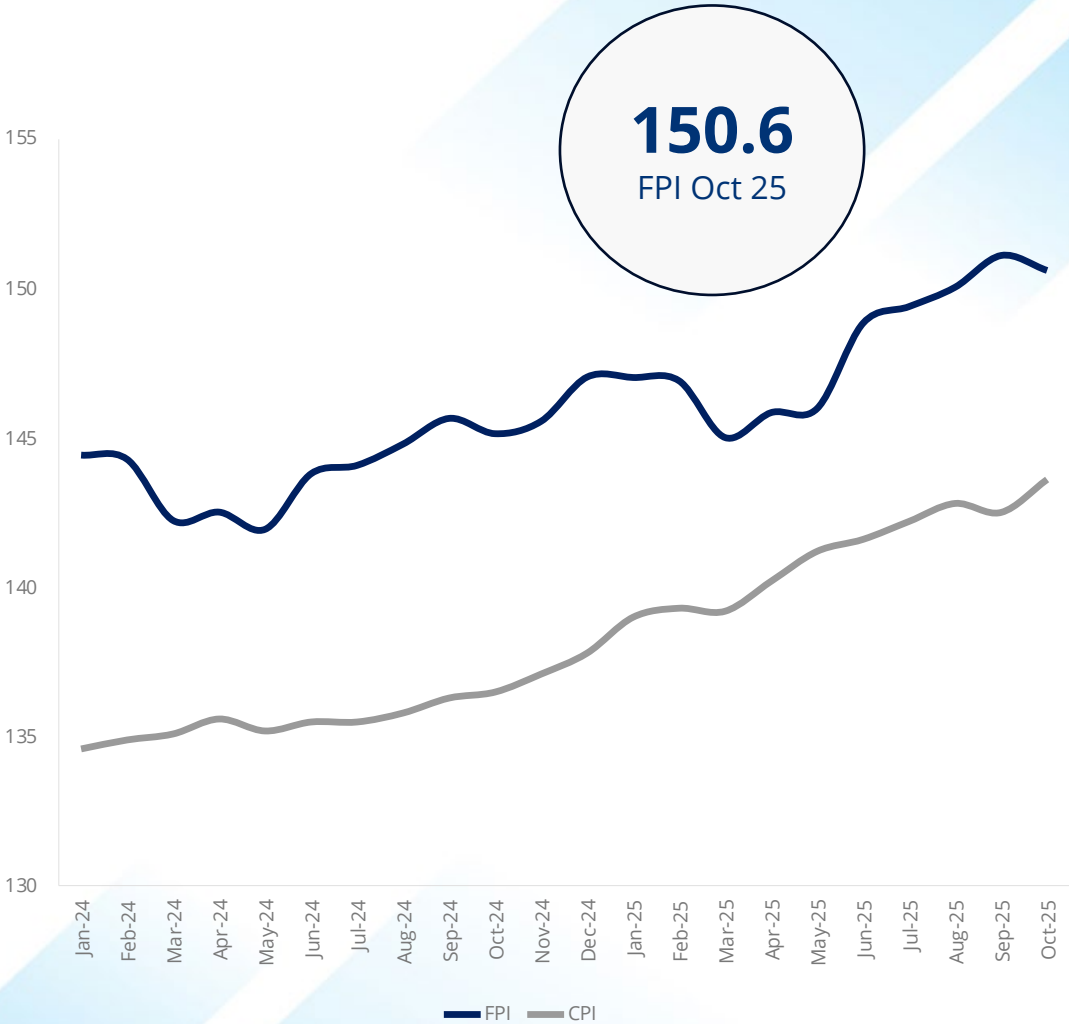
FPI Oct 25
YoY

2024 SUMMARY

FPI & CPI
PRICE INDEX

FPI
144.3
2024 AVERAGE
148.1
2025 AVERAGE

CPI
135.8
2024 AVERAGE
141.2
2025 AVERAGE



There are 4 primary cost factors impacting food prices to varying degrees:



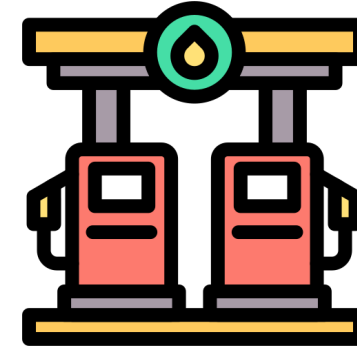
COMMODITY
INFLATION



WAGE
INFLATION



ENERGY
INFLATION



FUEL
INFLATION

COMMODITIES



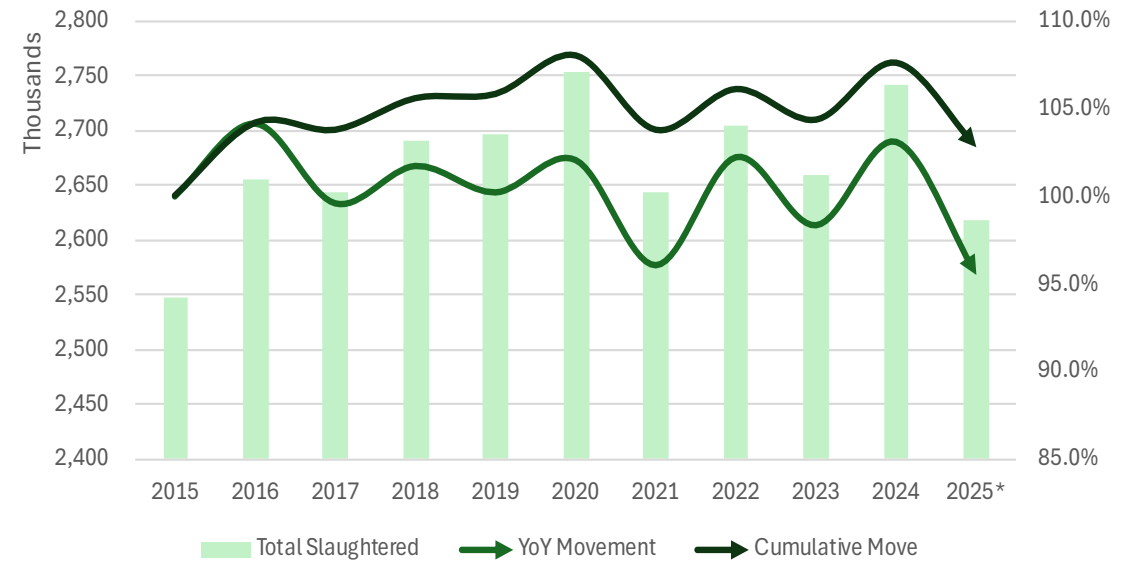
KEY COMMODITY MOVEMENTS

BEEF UK PRODUCTION

2024
2,742k mt

2025
2,618k mt
-4.5%

UK Cattle Slaughter Count



KEY COMMODITY MOVEMENTS

BEEF

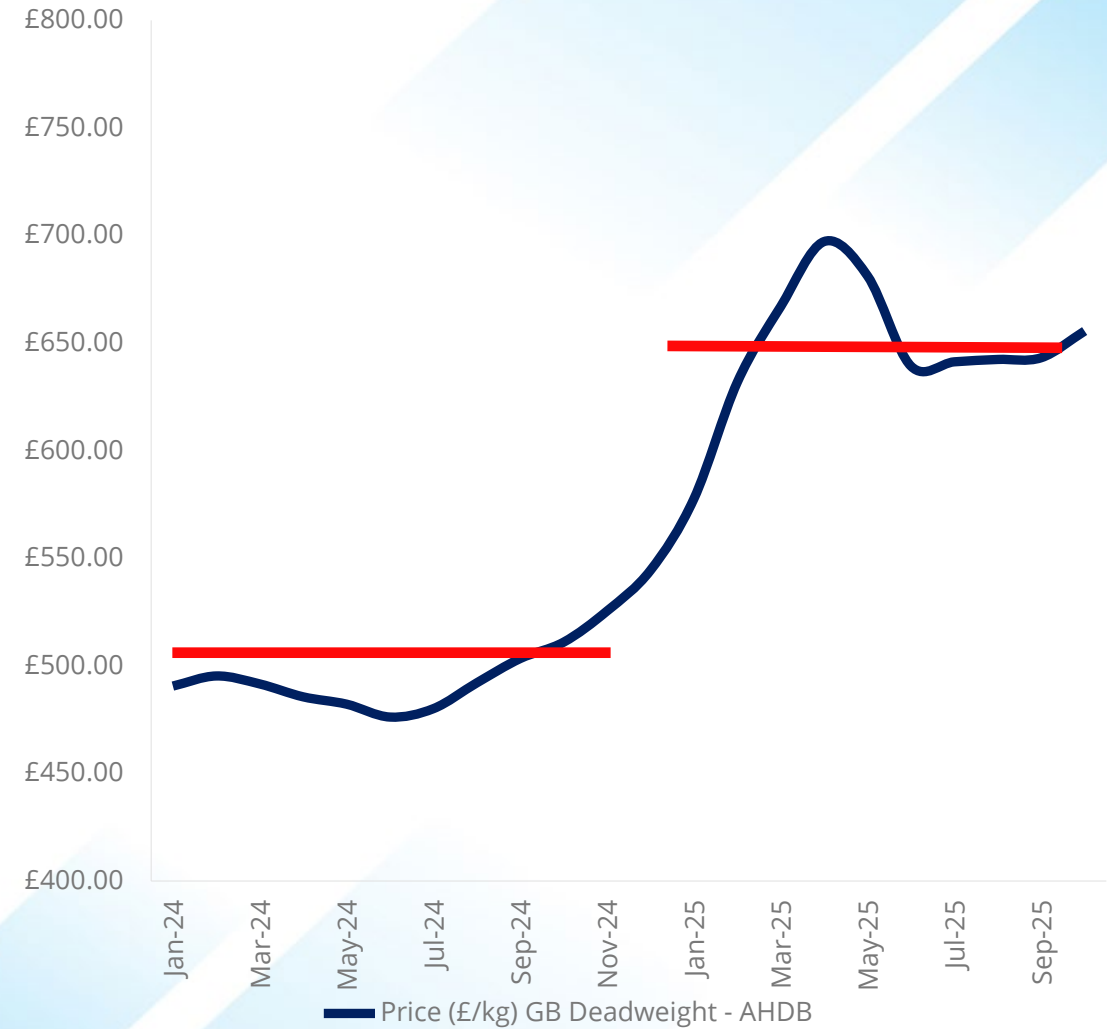
2024

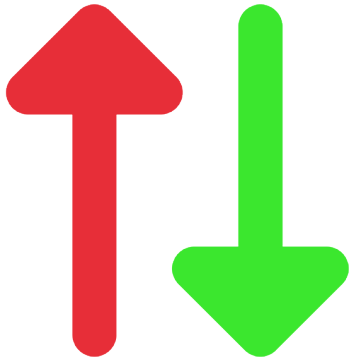
£4.98
FULL YEAR AVERAGE

2025

£6.48
JAN-OCT AVERAGE

+30%





**NOT ALL PRICING
MOVES EQUALLY
ON BEEF PRODUCTS**



**STEAK PRICING SEEN
LESS % PRESSURE
ON INCREASES**



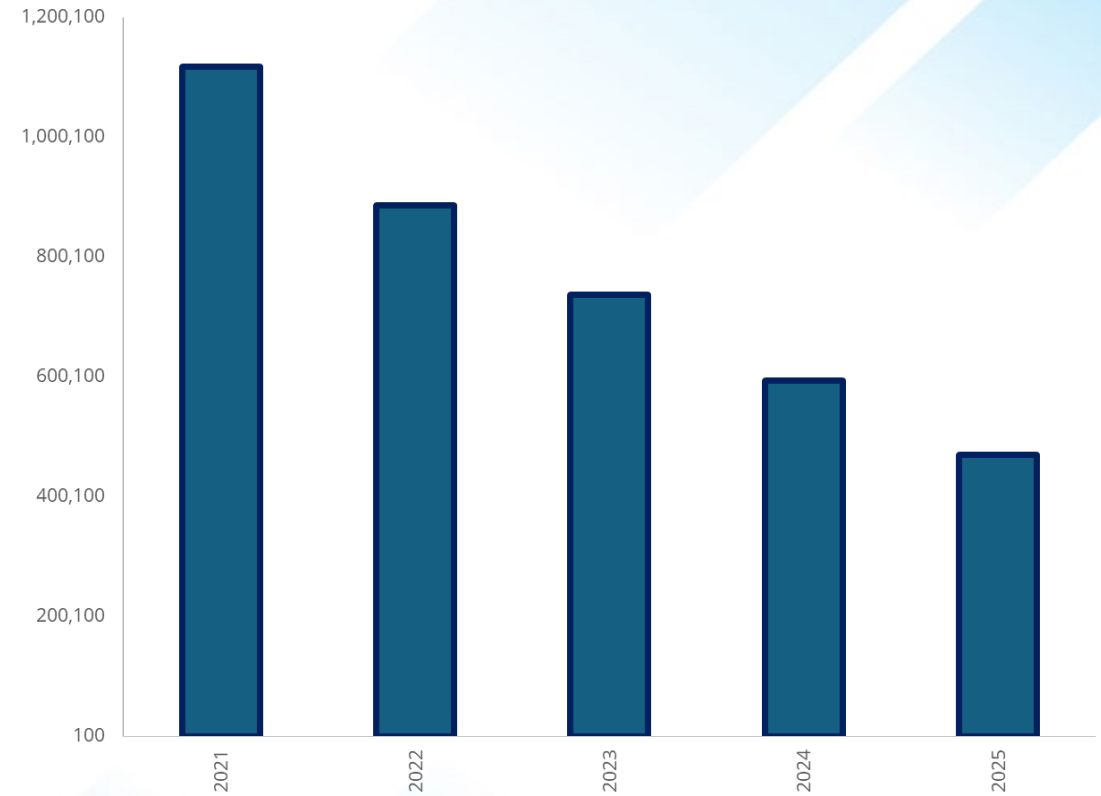
**LOWER VALUE CUTS
AND TRIM SEEN HIGHER
% LEVELS OF PRESSURE ON
INCREASES**

KEY COMMODITY MOVEMENTS

FISH QUOTAS

2024	2025
594k mt	470k mt
QUOTA	QUOTA

-21%



Cod & Haddock

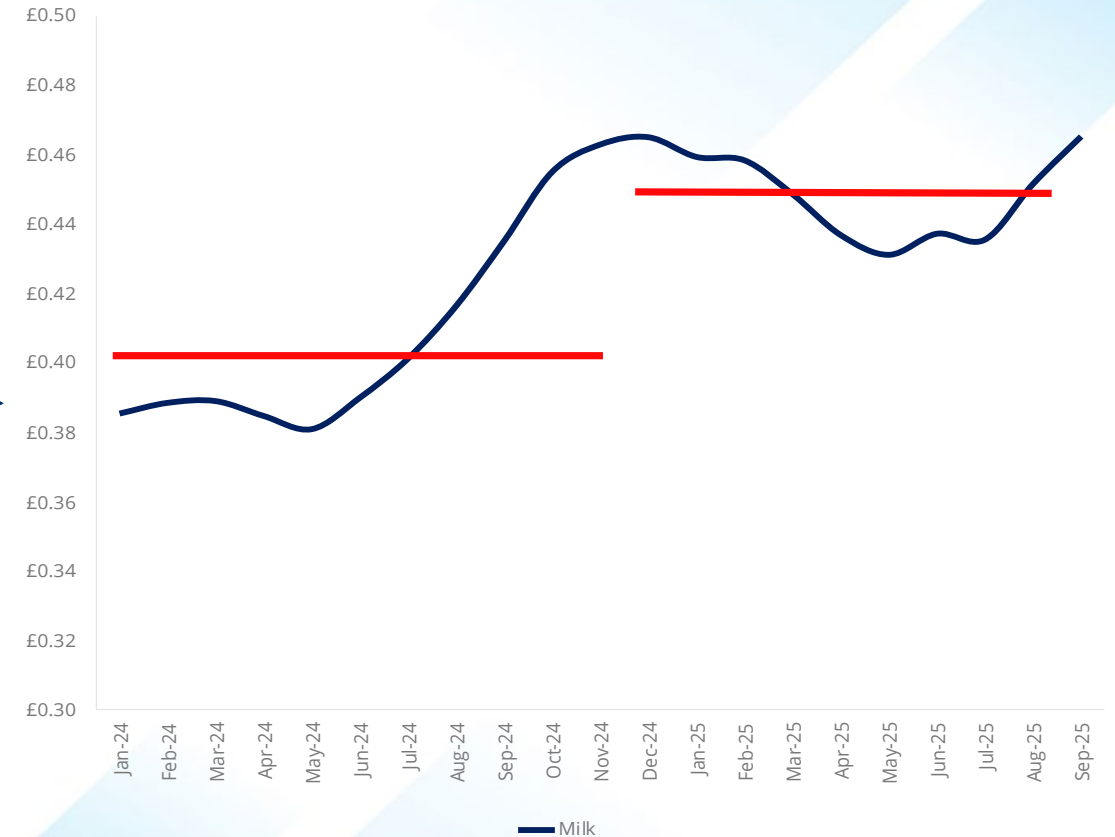
KEY COMMODITY MOVEMENTS

DAIRY

2024
41 ppl
FARMGATE MILK
FULL YEAR AVERAGE

2025
45 ppl
FARMGATE MILK
JAN-OCT AVERAGE

+10%



KEY COMMODITY MOVEMENTS

DAIRY

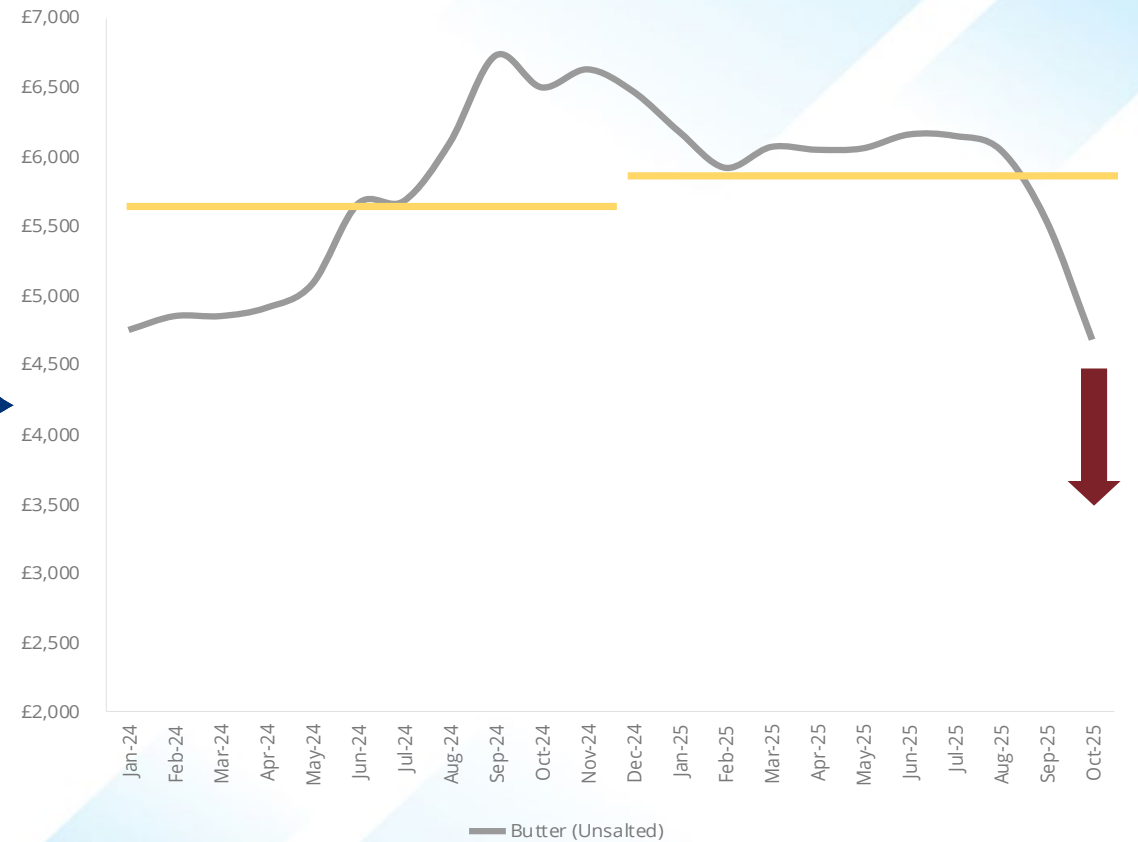
2024

£5,684
BUTTER UNSALTED
FULL YEAR AVERAGE

2025

£5,886
BUTTER UNSALTED
JAN-OCT AVERAGE

+3.5%



KEY COMMODITY MOVEMENTS

RAPESEED OIL

2024

£1,063
FULL YEAR AVERAGE

2025

£1,205
JAN-OCT
AVERAGE

+13%



KEY COMMODITY MOVEMENTS

OLIVE OIL

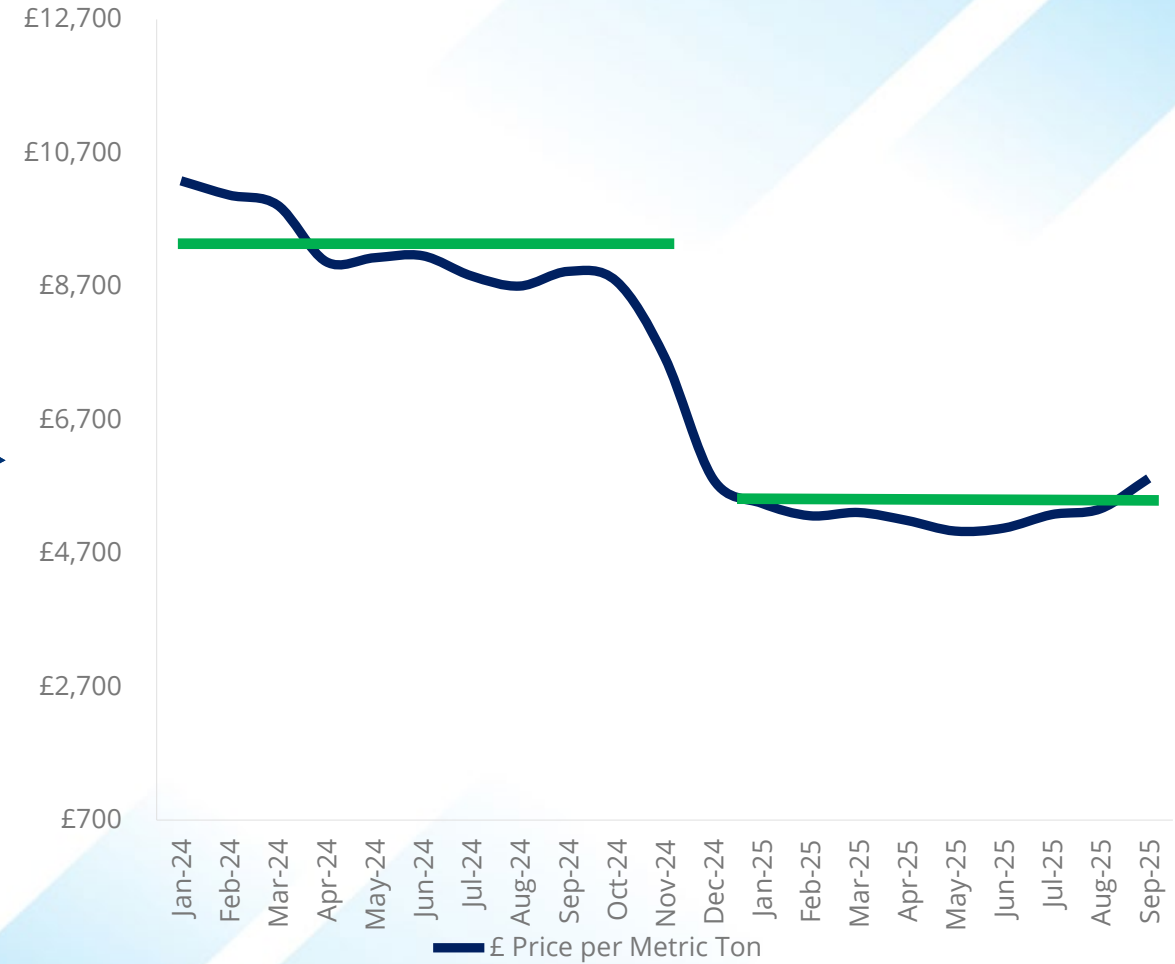
2024

£8,860
FULL YEAR AVERAGE

2025

£5,309
JAN-OCT
AVERAGE

-40%



KEY COMMODITY MOVEMENTS

WHEAT

2024
—
£178
FULL YEAR AVERAGE

2025
—
£165
JAN-OCT AVERAGE
-7.5%

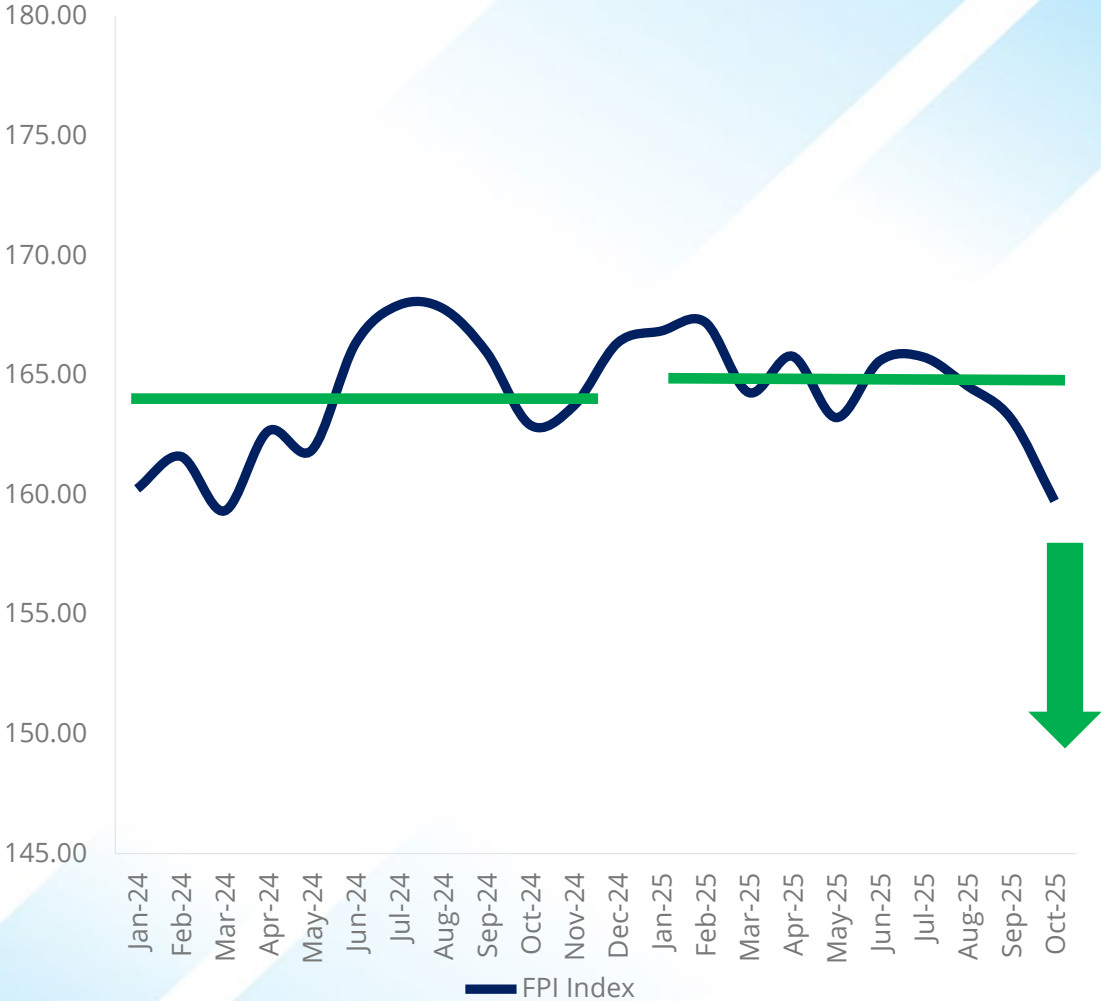


KEY COMMODITY MOVEMENTS

POTATOES

2024
163.9
FPI FULL YEAR
AVERAGE

2025
164.8
FPI JAN-OCT
AVERAGE
+0.5%



WAGES, ENERGY & FUEL COSTS

LABOUR COSTS

WAGES

2023

£2,262
FULL YEAR
AVERAGE

2024

£2,400
FULL YEAR
AVERAGE

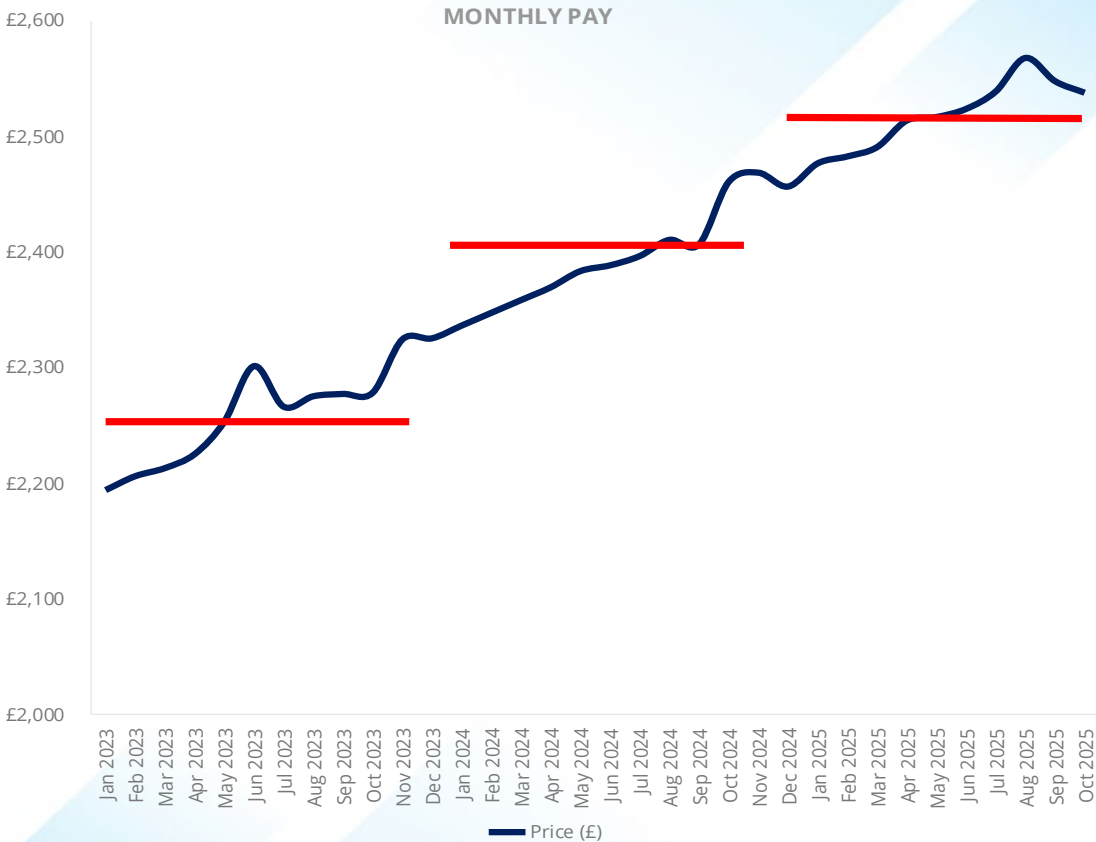
+6.1%

2025

£2,520

JAN-OCT
AVERAGE

+5% YoY

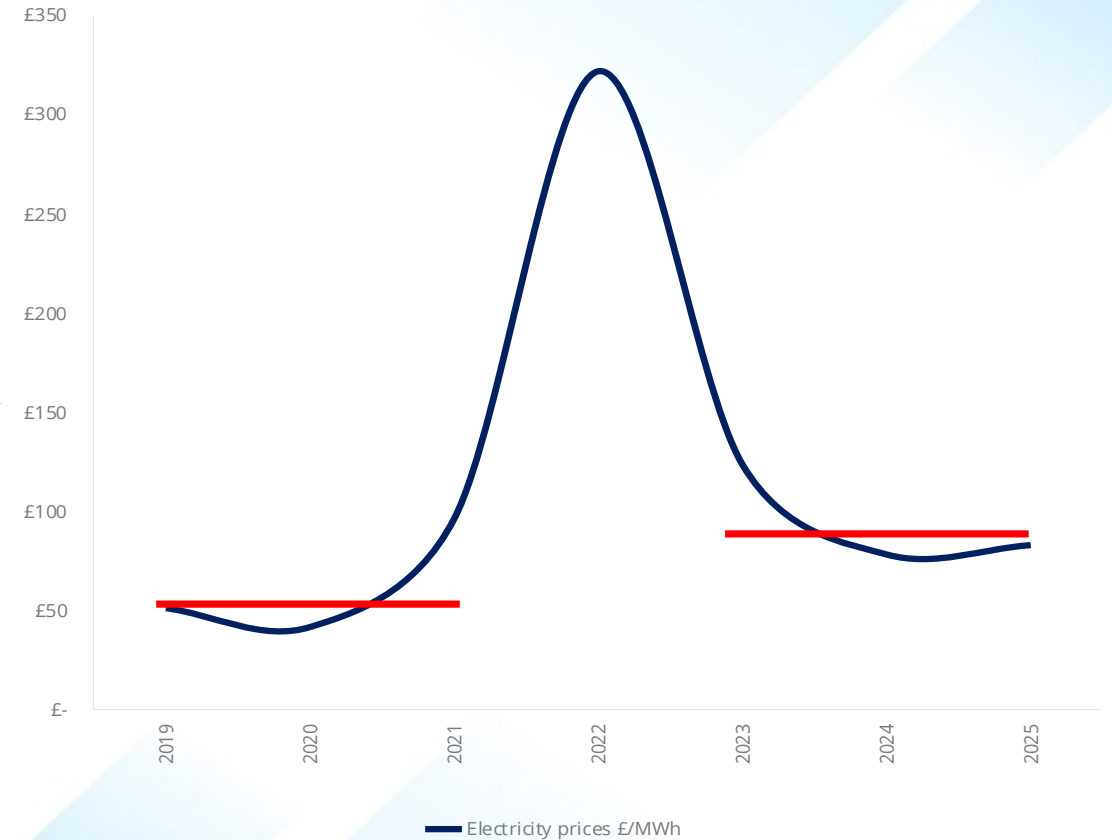


ENERGY PRICES ELECTRICITY

2023
—
£124
FULL YEAR
AVERAGE
PER MONTH

2024
—
£78
FULL YEAR
AVERAGE
PER MONTH

2025
—
£83
JAN-OCT
AVERAGE
+6% YoY



FUEL COSTS

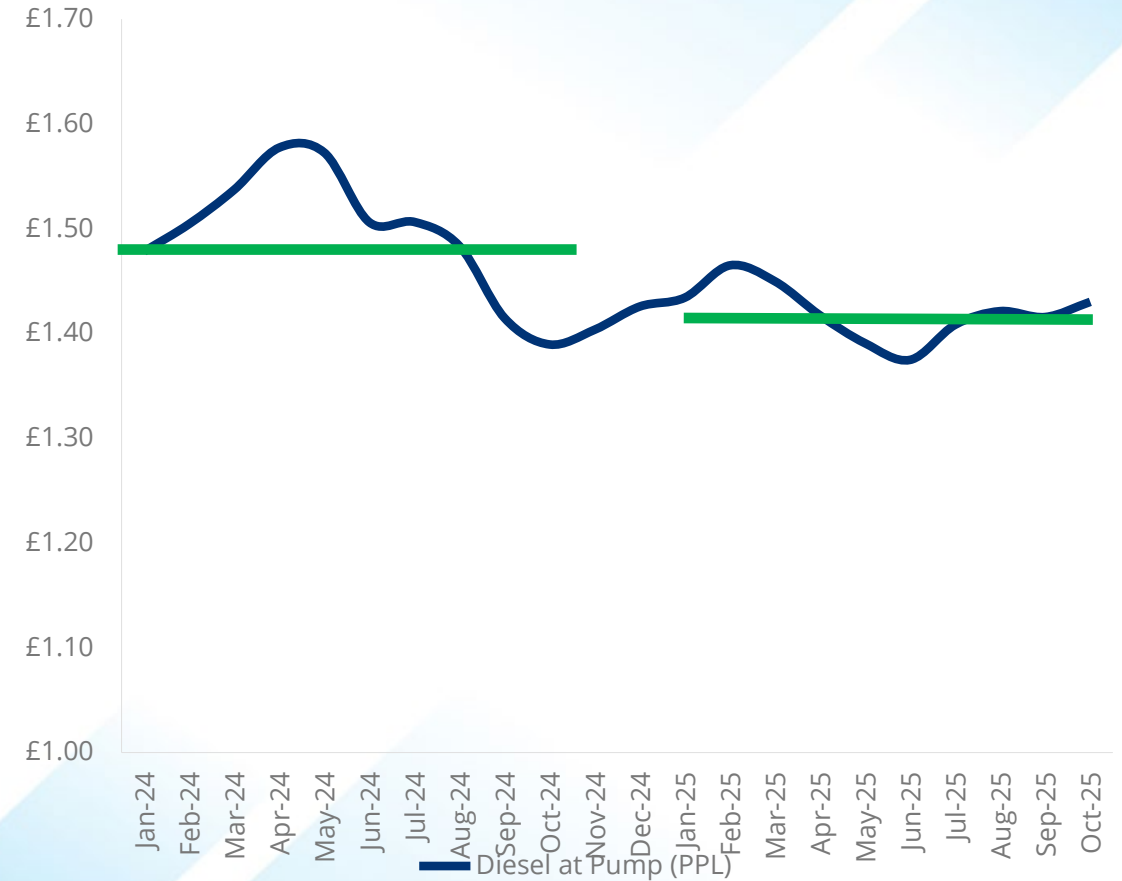
DIESEL

2024

£1.48
DIESEL AT PUMP
FULL YEAR
AVERAGE

2025

£1.42
DIESEL AT PUMP
FPI JAN-OCT
AVERAGE
-4%



There are 4 primary cost factors impacting food prices to varying degrees:



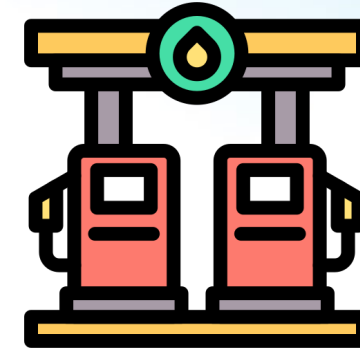
COMMODITY
INFLATION



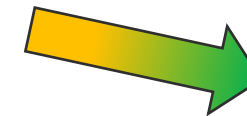
WAGE
INFLATION



ENERGY
INFLATION



INFLATION



Each one of these drivers can be impactful on their own depending on the product.

MITIGATING COST PRESSURES

- LABOUR COSTS EFFICIENCIES
- COMPETITIVE PRICING
- SEASONALITY



SEASONALITY IN MENU RANGES

- SEASONALITY BENEFITS
- LOCAL PRODUCE
- SWITCHING PRODUCTS BETWEEN SEASONS
- QUALITY
- PRICE

**BEING MORE AGILE CAN OFFSET
SEASONAL ON-COSTS AND IMPROVE
QUALITY**

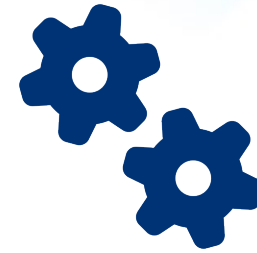




**NOT COMPROMISING ON
QUALITY – INVESTING IN
PREMIUMISATION**



**DRIVING EFFICIENCIES
THROUGH THE SUPPLY
CHAIN**



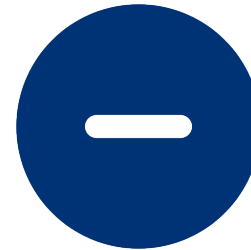
**EXPLORING ALL COST
LINE IN THE P&L NOT
JUST FOOD AND DRINK**



**RISE IN NATIONAL
MINIMUM WAGE**



**RISE IN COSTS THROUGH
BUSINESS RATE
VALUATIONS**



**NO BUSINESS CAN AFFORD
TO HAVE SUB OPTIMAL
SUPPLY CHAIN**

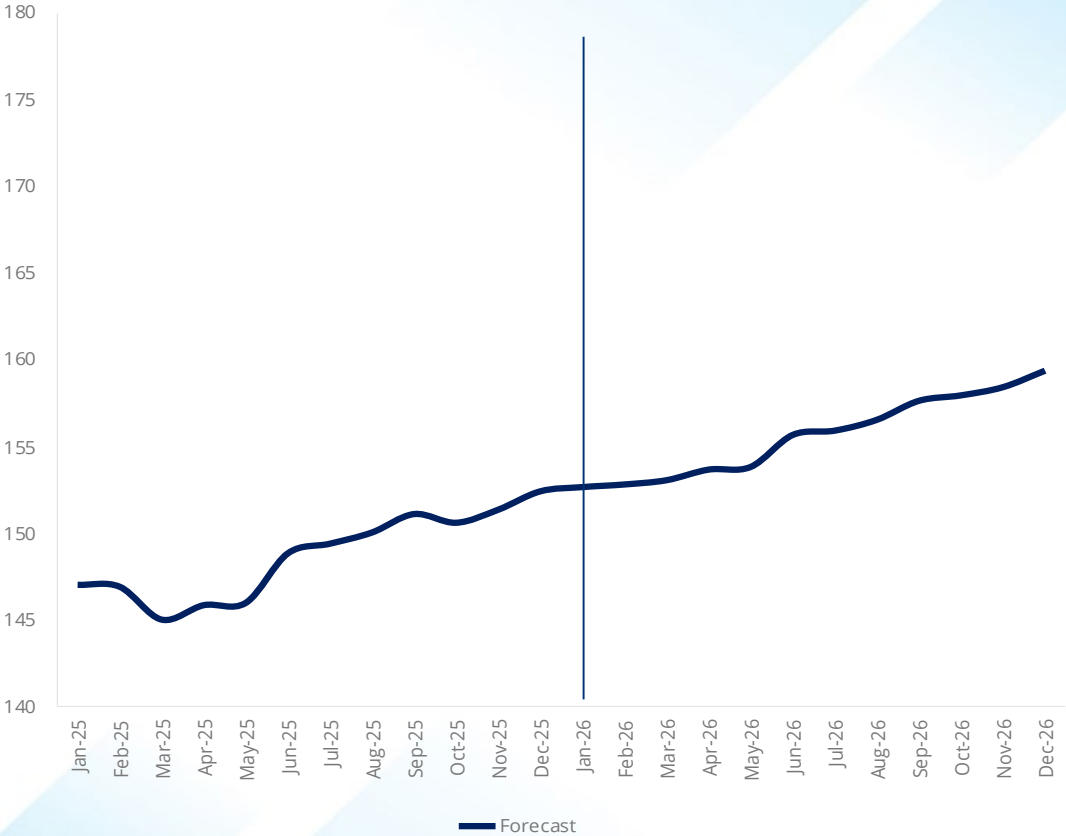
WHAT DO WE EXPECT TO SEE IN 2026?

WHAT DO WE EXPECT TO SEE IN 2026

INDEX

2025
148.1
JAN-OCT 25
AVERAGE

2026
155.6
2026 FORECASTED
AVERAGE

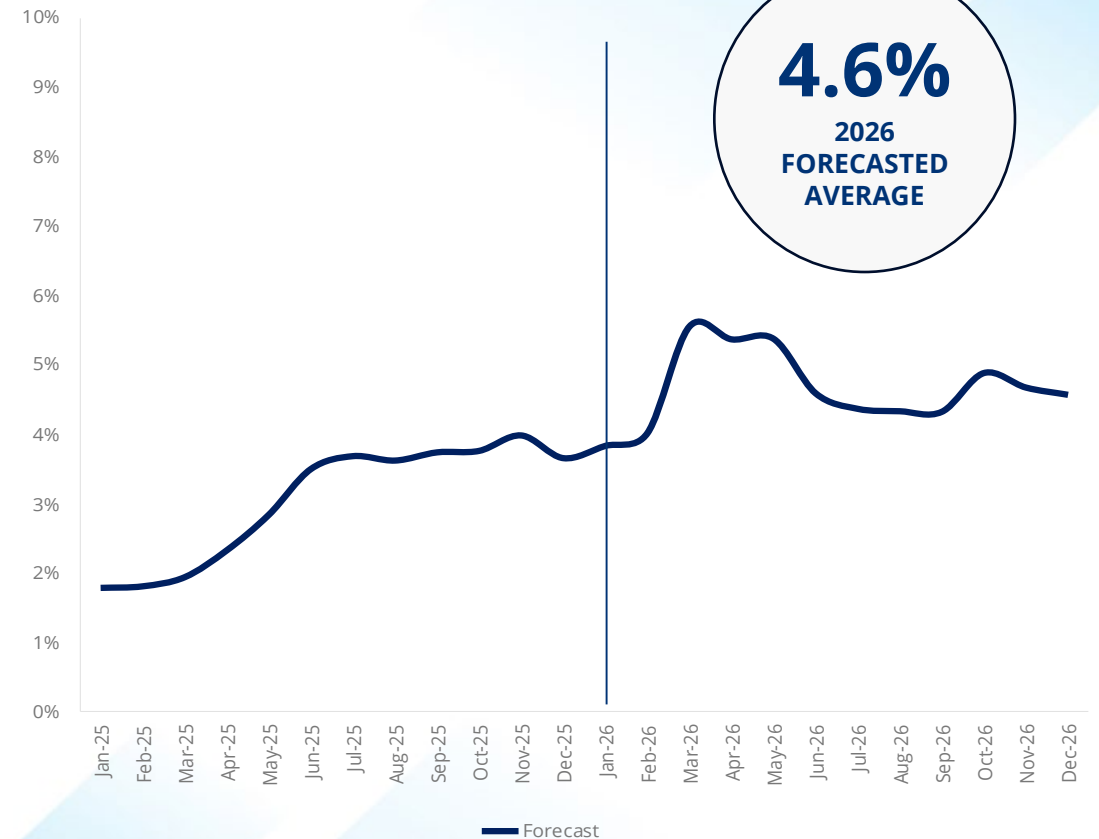


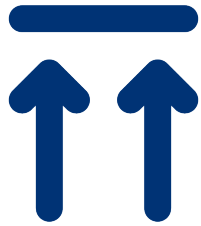
WHAT DO WE EXPECT TO SEE IN 2026

INFLATION

2025
2.9%
JAN-OCT 25
AVERAGE

2026
4.6%
2026 FORECASTED
AVERAGE





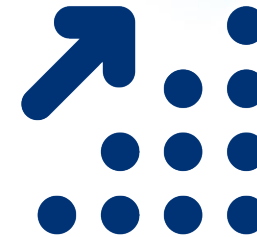
Maximising value through your procurement & supply chain

Focus on the costs you can
control



Sweat the Small Stuff

Ensure all costs for goods and
services in your P&L are
optimal



Strategic Procurement initiatives

has seen our clients deliver on
average improvement of
10.7% to the bottom line and
2.5% improvement to GP

SUSTAINABILITY

Whilst priorities have shifted to be cost focussed over the past 12 months – Sustainability is still a critical boardroom Agenda item

Environmental impact: Food production is a major contributor to climate change, deforestation, and water use. Sustainable practices help mitigate these issues.

Biodiversity: Sustainable agriculture helps preserve biodiversity, which is threatened by current farming methods.

Social equity: Supporting social equity by promoting fair wages, safe working conditions, and sustainable livelihoods for farmers and workers



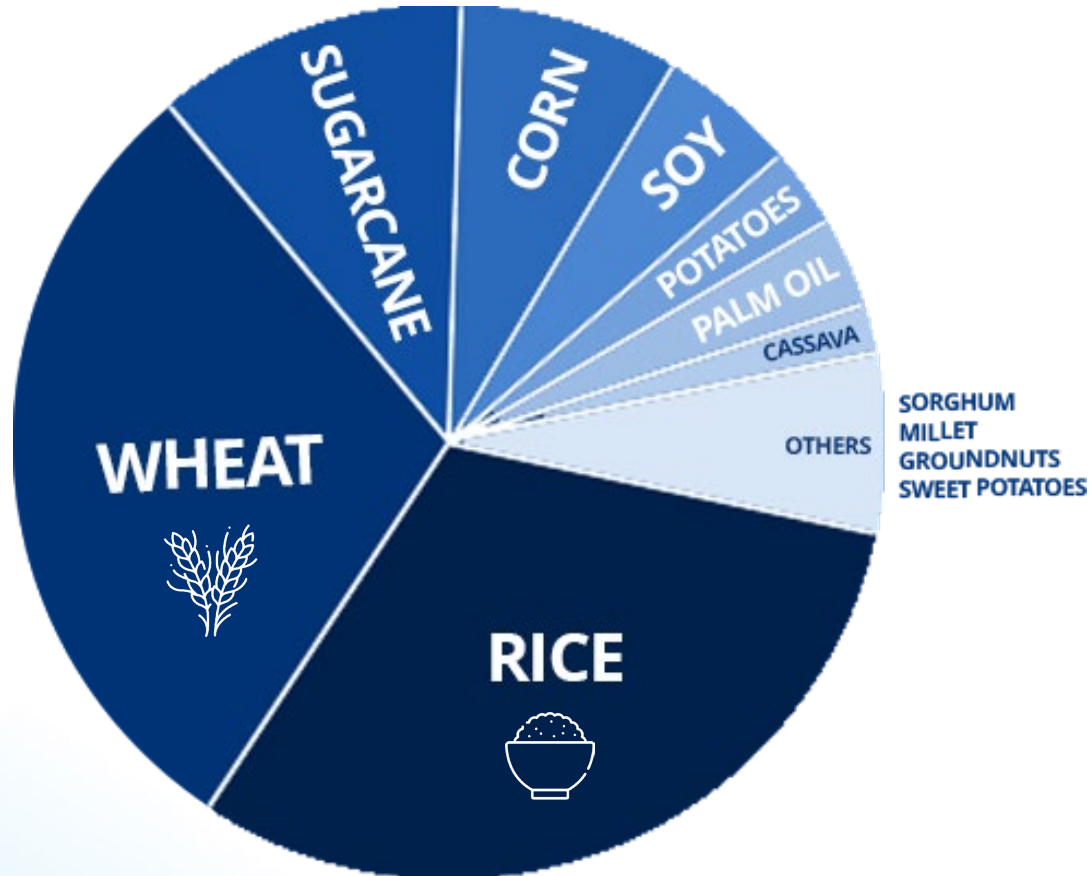
75% of our calories now come from just 12 crops and 5 animals, leading to:

- reduced diversity in our nutrition
- crops (and animals) that are vulnerable to climate volatility, pests, and diseases
- demolition of alternative species
- farmers with limited choices of crops to grow

Over 300,000 plants are potentially fit for consumption



**61% OF OUR
CALORIES
12 CROPS**



**THE REMAINING
14% COMES
FROM 5 ANIMALS**



CATTLE



CHICKEN



PIG



GOAT



BUFFALO

Fleet Street.

PEACH
20/20

PLANET
PEACH

THE SUSTAINABILITY SUMMIT



ZERO
CARBON
FORUM

PRESTIGE

Optimising Hospitality Procurement

4 MARCH 2026 | KINGS PLACE | LONDON

“**Conventional Farming** is the most common farming approach to produce products in scale to achieve consistent standards with the quickest and highest yields”

“**Regenerative Farming** is an approach to farming that seeks to regenerate the land, soil and water, as well as enhance the wider environment and improve the nutrient density of food produced”

IMPORTANCE OF UNDERSTAND FARMING AND WHAT IT MEANS TO PRODUCTS IN YOUR BUSINESS



 OPTIMISE
— VENDOR —

The Club
— VENDOR —

Data&Insight
SERVICES — VENDOR —

David Read

PRESTIGE

Optimising Hospitality Procurement

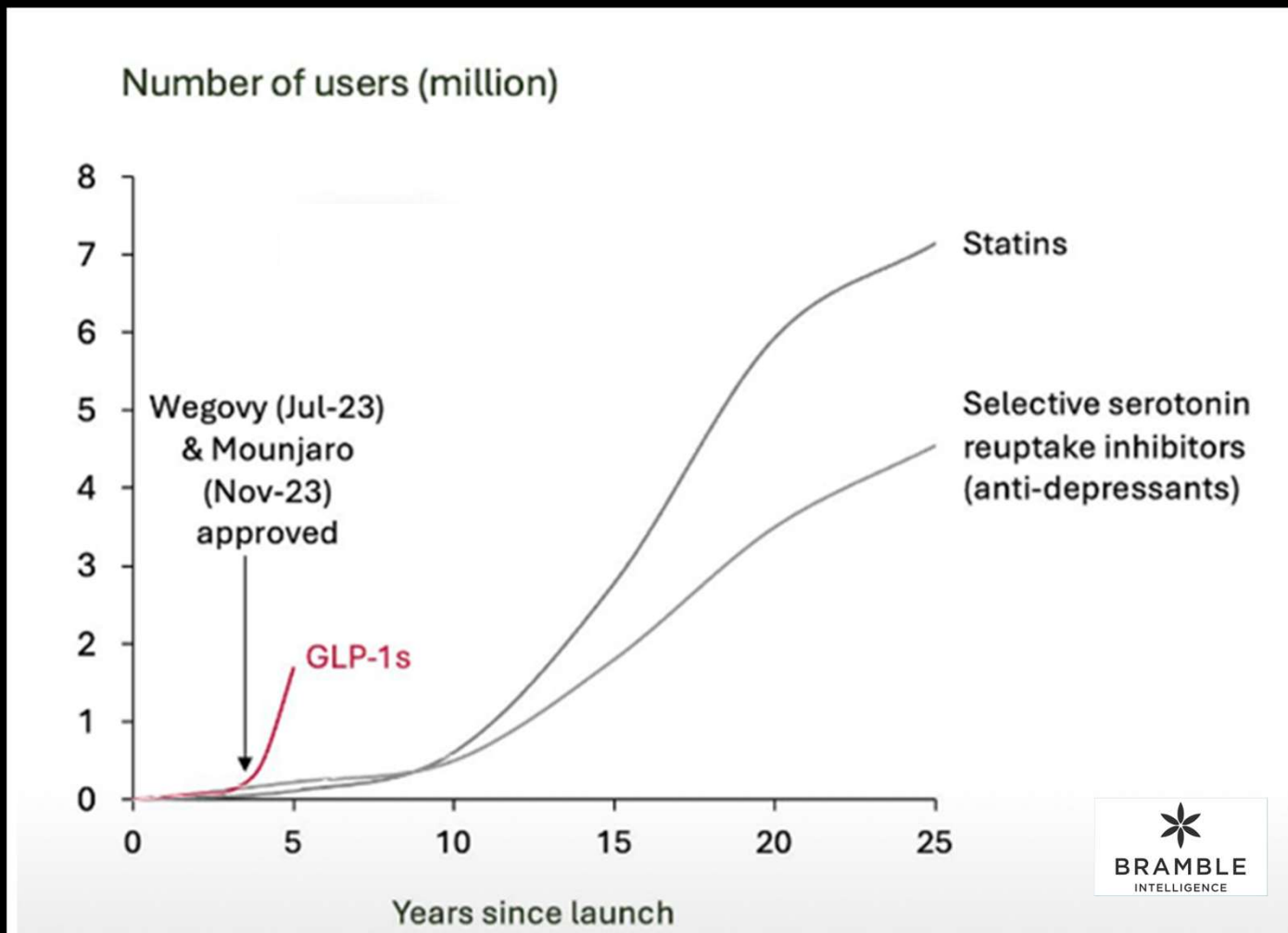
SIGNIFICANT WAVES OF CHANGE

HEALTH



Weight Loss Drugs

UPF



**Weight-loss drugs
in the UK have
experienced a very
fast start
compared to
STATINS and ANTI-
DEPRESSANTS**

1.7m users now (2.5%) – as many as 13m users (19%) by early 2030s

GLP-1 USERS ARE...

Doing more

- **Healthy options**
- **Nutrient dense options**
- **Proteins, Fruit Vegetables**
- **Sharing others food**
- **Selecting fewer courses**
- **LESS visits & LESS Food/Alcohol**

Doing less

- **Snacks**
- **Alcohol**
- **Carbonated Soft Drinks**
- **High Carb foods**
- **Sugar/Fat treats**
- **All you can eat/pile it high**

**Restaurant choice influenced by recognition of different needs
LESS single diners, MORE starters and sharing plates, LESS sugary desserts**

Unprocessed/ Minimally processed	Processed ingredients	Processed	Ultra - processed
 Fruit	 Oils	 Ham	 Supermarket bread
 Vegetables	 Sugar	 Cheese	 Ready meals
 Eggs	 Salt	 Bread	 Breakfast cereal
 Milk	 Honey	 Bacon	 Cakes
 Meat	 Butter	 Salted nuts	 Crisps

“Ultra-processed foods are designed to be over-consumed”

“They are the #1 cause of diet related diseases, including obesity and early death”

“We have lost our understanding of how weight gain really works”

Dr. Chris van Tulleken
Associate Professor UCL

SIGNIFICANT WAVES OF CHANGE

HEALTH



Weight Loss Drugs

UPF Foods

AI



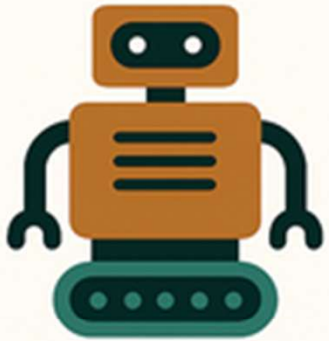
Gut science

Farming techniques

AI AND GUT HEALTH



TECHNOLOGY IN FARMING



AI ROBOTICS



SOIL & WEATHER
DATA



DRONE USE FOR
DISEASE CONTROL



SOIL EMISSIONS
& BIODIVERSITY

UK Farming is starting to use AI/Robotics

Data driven innovation is now proven to impact yield, and enable environmental improvements

Robotics enabling efficiency in planting and picking

Enhanced disease management

SIGNIFICANT WAVES OF CHANGE

HEALTH



Weight Loss Drugs

UPF Foods

AI



Gut science

Farming techniques

GOVERNMENT



Good Food Cycle

Food strategy

DEFRA'S GOOD FOOD CYCLE



**BALANCE
DIETS**



**TACKLE FOOD
WASTE**



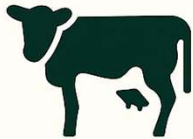
**HEALTHY
SOILS**



**EMPLOYER
BETTER**



**STABLE (=)
PRICES**



**GOOD ANIMAL
WELFARE**



**REDUCE
EMISSIONS**



**PROTECT
BIODIVERSITY**

PLUS +

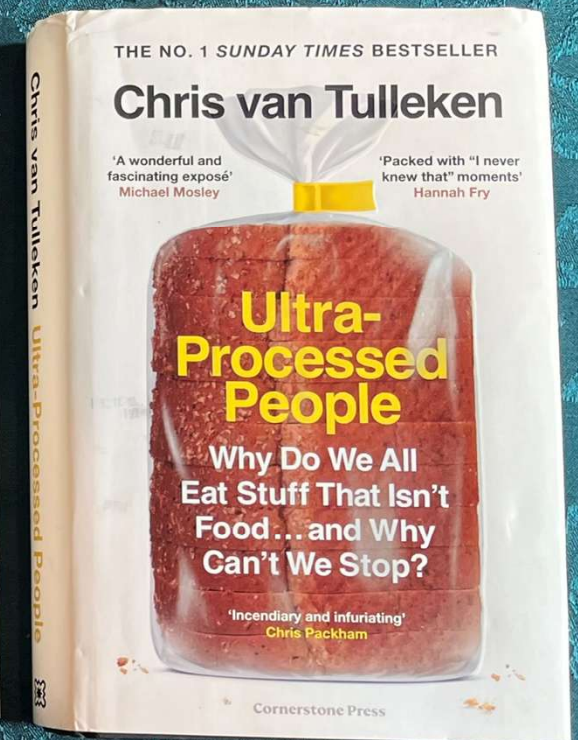
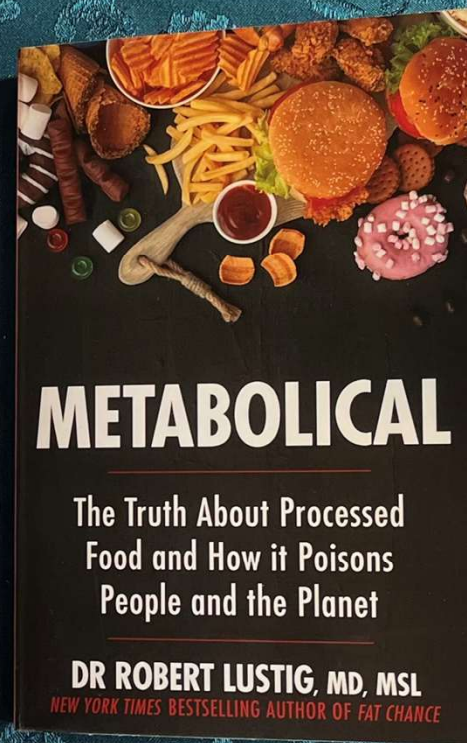
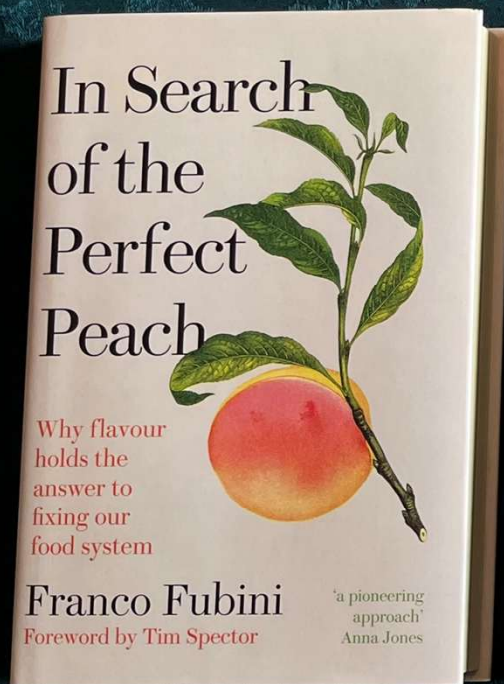
Accessible for all

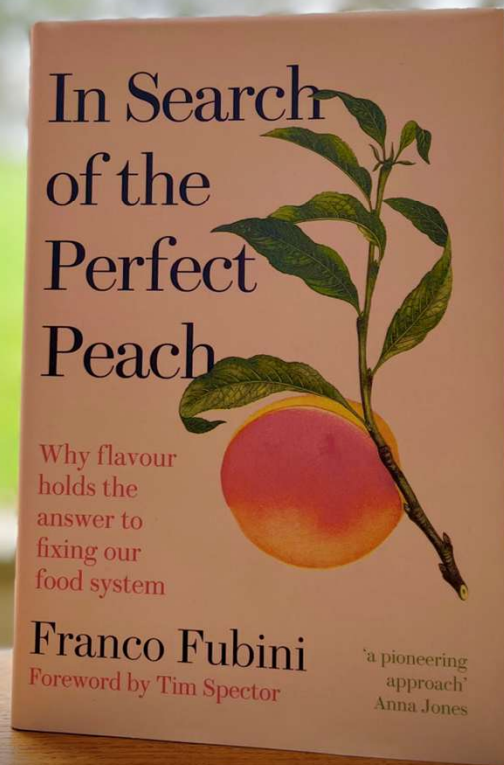
Security of UK supply

Vibrant Food cultures

Cooking skills for all

Better trade policy





Franco Fubini



THANK YOU TO OUR SPONSORS



NATOORA

Saucery
Fresh from the Chef



The **FoodHEROES**

BELU
DRINK THE DIFFERENCE

Bitiful
gut health

A FAMILY BUSINESS
STEPHENSONS
Supporting The Catering Trade Since 1868

MINT
hospitality & events people



CGA PRESTIGE
FPI
FOODSERVICE PRICE INDEX
ANNUAL BRIEFING 2025

PRESTIGE
Optimising Hospitality Procurement

**THANK YOU FOR JOINING US
ENJOY COCKTAILS AND DRINKS COURTESY OF**

