



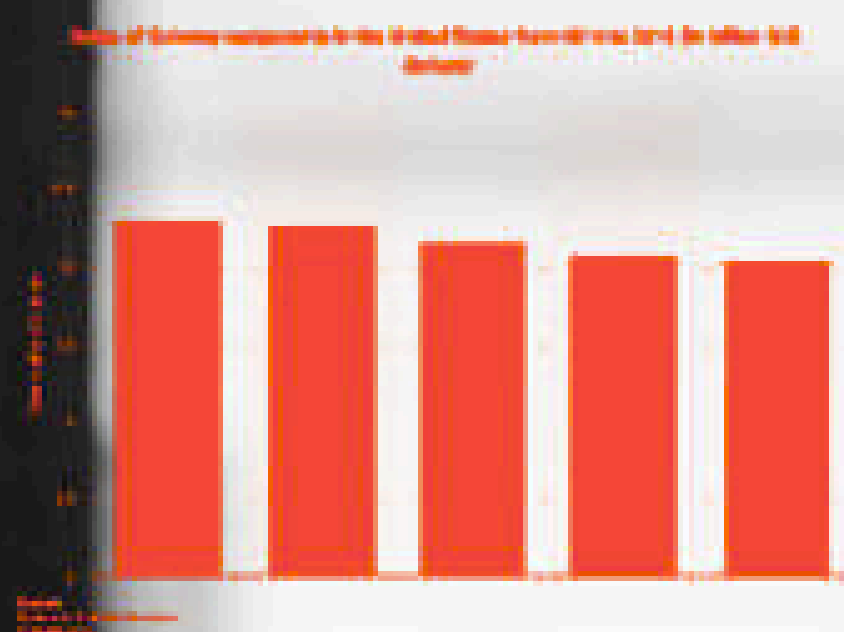
FoodByUs Index EOFY Report

Empowering hospitality: From kitchen to boardroom, data-driven decisions served fresh.

July 2025



1421	Leisure	\$80.00
111	Niches	\$44.00
1254	Casual	\$35.20
1423	Hamburger Buns	\$33.33
111	Jack Cheese	\$11.25
12456	Beef	\$0.00
327	Shredded Cheese	\$0.00
	Other	\$ 0.00



Overall restaurant transactions
Compared to the same period last year

Introduction

Real-time intelligence from the coalface of Australia's \$65 billion foodservice industry.

The 2024-25 financial year tested every assumption about how Australia's foodservice sector operates. The FBU Index captures what's happening in kitchens, supplier warehouses, and restaurant cash flows—right now.

We track the financial year as it unfolds through real transaction data from thousands of venues across the country. When chicken prices spike in July or avocado costs surge earlier than expected, our operators know immediately, not when the next quarterly report drops.

We don't forecast trends. We report what's already moving markets.

Built from the daily purchasing decisions of Australia's independent restaurants, cafes, pubs, and catering operations, the FBU Index delivers the market heartbeat that matters most: the actual cost of running a food business today.

This isn't consumer sentiment or supply chain theory—it's the raw data of profit margins, menu planning, and survival strategies.

Our financial year analysis cuts through complexity to focus on the fundamental question every Australian operator asks: "What will this cost me tomorrow?"

The difference between knowing about markets and knowing markets.

The venues in our network represent the backbone of Australian hospitality—the operators who can't absorb cost shocks through corporate purchasing power or financial hedging strategies. Their purchasing patterns reveal market realities that aggregate industry data often obscures.

This financial year report doesn't just chronicle what happened—it explains why certain cost pressures emerged, which categories showed resilience, and where operators found their margin relief. These insights come from being embedded in the industry, not observing it from the outside.

FoodByUs Inflation

Food inflation tracks how much more operators pay for the same ingredients over time. Unlike the Consumer Price Index that measures household shopping baskets, the FBU Index captures the specific cost pressures hitting commercial kitchens—from wholesale meat prices to bulk cooking oils.

When floods wipe out lettuce crops or energy costs spike freight charges, these impacts hit venue budgets immediately. A 30% jump in egg prices doesn't just mean adjusting one menu item—it can reshape entire profit margins for operators running tight food cost percentages.

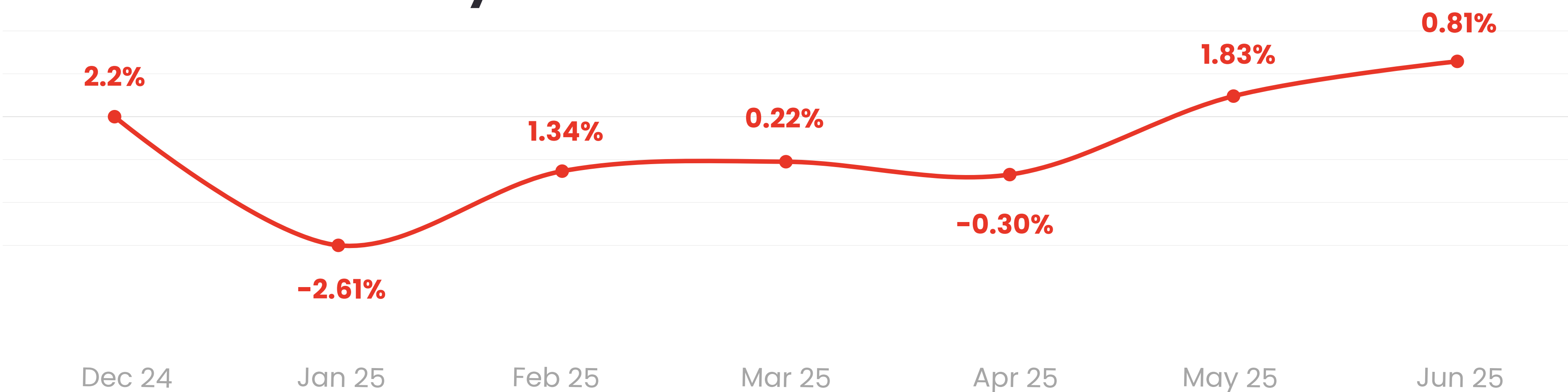
The factors driving price increases include:

- Weather disruptions affecting growing regions
- Transport and energy cost fluctuations
- Supply chain bottlenecks
- Labour shortages in production & logistics

For most venues, food costs represent 28–35% of revenue. Even modest ingredient price increases compound quickly when you're ordering by the case, not the kilo. The FBU Index tracks these wholesale price movements as they happen, giving operators early visibility into cost pressures before they hit monthly supplier invoices.

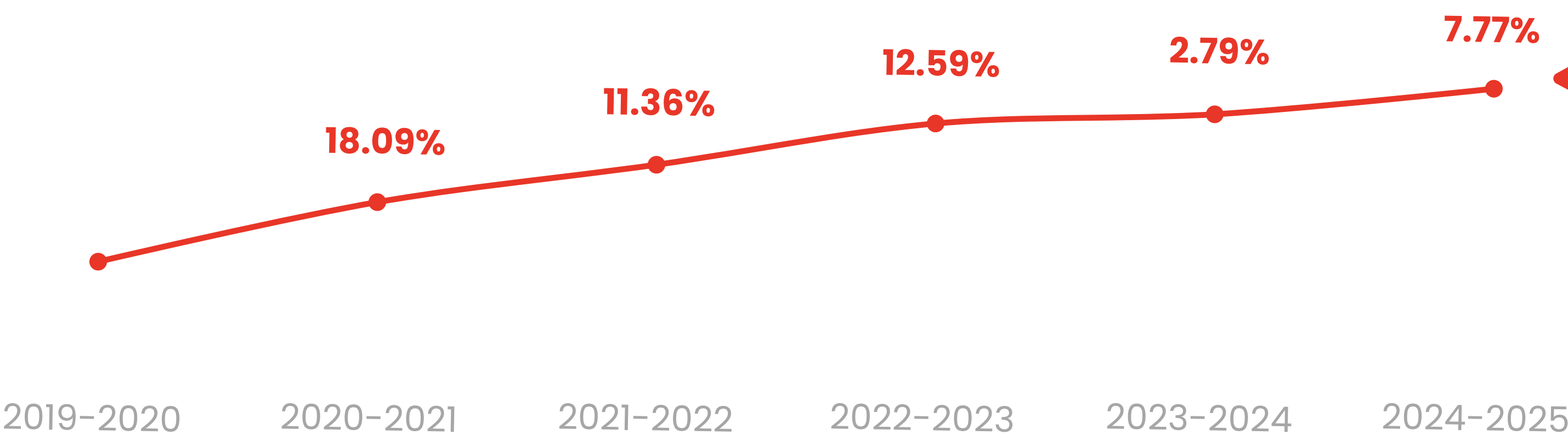
Real-time ingredient intelligence beats reactive menu repricing every time.

Overall inflation by month



% inflation of all products on FoodByUs (monthly)

Overall inflation by financial year



% inflation of all products on FoodByUs (financial years)

Our FBU Index of food service inflation finished up 7.77% for the financial year.

Category Inflation








The 2025 financial year revealed dramatic cost disparities across food categories, creating distinct challenges for different types of operations. While baked goods operators faced a perfect storm of energy and input cost pressures, meat-focused venues benefited from stable protein pricing and increased processing capacity.

The biggest category of inflation is Alcohol, up a staggering 44% since January. This is due to rising taxes, specifically excise taxes with automatic twice-yearly CPI indexation delivering Australia's third-highest spirit taxes globally. Licensed venues absorbed \$5,400 in additional annual costs per outlet. However, the government has announced a two-year freeze on draught beer excise from August 2025, recognising the pressure on hospitality businesses—though this relief excludes spirits and packaged beer.

Baked goods – up 12.2%. This reflects the energy crisis hitting commercial kitchens. Energy costs alone increased 50% over three years, compounded by sugar prices rising 46% and cocoa spiking 200%. Energy-intensive operations like bakeries and pastry-heavy venues faced operational costs that many couldn't absorb, forcing widespread menu redesigns and supplier renegotiations.

Meat and poultry's relative stability at 2.6% bucked the inflation trend thanks to enhanced processing capacity and strong export demand. As the centre of plate, stable meat pricing provides crucial cost relief for venues where protein drives menu pricing and customer satisfaction. Protein-focused menus maintain cost competitiveness, while pastry and alcohol-heavy operations may require adjustments to their business models to preserve margins in Australia's challenging cost environment.

Category Inflation for 2025

 Alcohol	+44% ↑	 Seafood	+3.0% ↑
 Baked Goods	+12.2% ↑	 Meat & Poultry	+2.6% ↑
 Dairy & Eggs	+8.1% ↑	 Pantry	+0.7% ↑
 Fruit & Veg	+4.9% ↑		

% inflation of all products on FoodByUs by category (since January 2025)

FoodByUs Finds

Our Take On The Avo On Toast Index

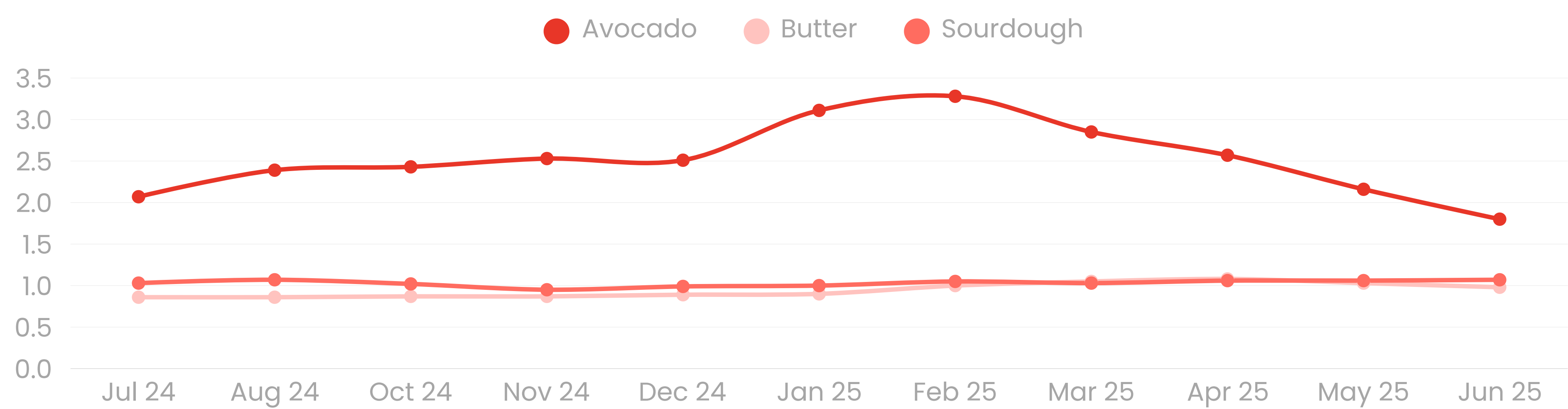
The ingredient costs of Avo on Toast peaked in Feb at \$5.33 but has fallen off considerably to \$3.85 at end of June. The cost of avocados has been the influence for this, with other ingredients like sourdough and butter remaining relatively stable.

Avocado on Toast Price Movement



price changes in cost to make Avocado on Toast (monthly)

Avocado on Toast Price Movement



price changes in Avocado, Butter & Sourdough (monthly)



FoodByUs Finds continued

Olive Oil

Olive oil is up 35.2% this financial year, rising further in 2 consecutive years: up 16% from 2022 to 2023 and 32% from 2023 to 2024. That's an average of \$8.50 per liter up to \$15 per liter. The price of olive oil has surged due to severe drought and extreme heat in Spain (which produces nearly half the world's supply) that halved production for two consecutive years, creating a global supply crisis that pushed prices to record highs.

Olive Oil

+35.2%

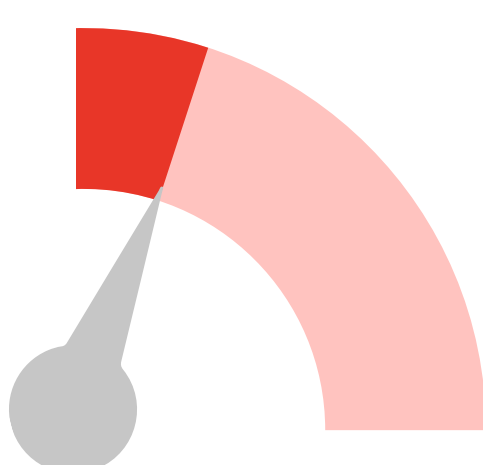


Baked Goods

Baked goods faced a triple hit with butter surging 20% in the final month alone, while flour rose 25% and eggs climbed 44% over the full financial year – a combination that eliminated any margin relief for operators already grappling with the category's 12.2% annual inflation rate.

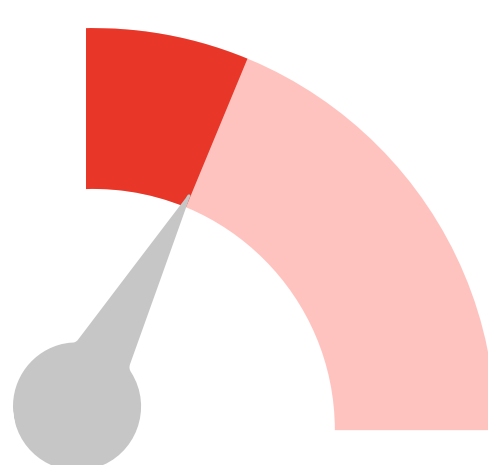
Butter

+20%



Flour

+25%



Eggs

+44%



Pub Environment

Australian pubs are spending 10% less on ingredients due to a perfect storm of rising labor costs (7.25% wage increases over two years), reduced consumer spending (29% drop in dining expenditure), and strategic menu simplification to survive in the industry's most challenging operating environment in decades.

Our Data Footprint

FoodByUs is data driven at the core. We categorise, consolidate and measure purchasing activity from foodservice venues with product level detail. Our data footprint does not include QSR, retail or FMCG.



Restaurants



Cafes



Pubs



Clubs



Caterers



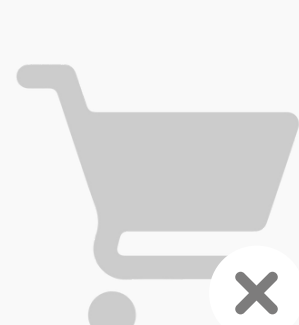
Aged Care



QSR



Retail



FMCG

FoodByUs is Australia's #1 wholesale food ordering software that goes beyond simple ordering. Our platform offers a comprehensive solution for multi-venue operators and individual operators through to multi site groups looking to manage their business profitability strategically.

Our platform provides:

- Simple ordering from any distributor across all categories
- Advanced menu costing tools
- Seamless accounting integrations
- Point of sale integrations
- Real-time procurement management

With a growing network of 3000 suppliers and processing over 20,000 carts monthly, we're transforming how foodservice businesses approach purchasing and financial planning.

Founded in 2017 by the co-founders of Menulog, our team brings deep expertise in technology, data, and the intricate dynamics of the food service industry.

Our customised data snapshots deliver transparent, unbiased, live transactional data from the independent food service market.

We're not just tracking trends; we're revolutionising food service procurement. Our software is designed to help businesses stay ahead of market fluctuations, optimise operations, and drive profitability.

Stay tuned for more insights from the FBU Index and discover how our cutting-edge procurement software can transform your business.

Want to learn more?

For more information about our data & insights and marketing products please contact:

Amber Phelps

Data & Insights Sales Manager
FoodByUs
P: 0423 334 201
E: amber@foodbyus.com

Ben Lipschitz

Chief Executive Officer
FoodByUs
P: 0401 879 617
E: ben@foodbyus.com

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