October 2026

INPUT COST BULLETIN
Q2 2026

Food and drink producer prices, consumer prices and inflation

- In June 2026, EU food and drink producer prices decreased by 2.1% compared to June 2025.
- Consumer food prices increased by 0.9% over the same period.
- General inflation was up by 2.9% in June 2026 compared to June 2025.

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Energy prices

Crude oil and natural gas

- In June 2026, average crude oil prices were up 20% compared to June 2025.
- EU natural gas prices were up 23% compared to June 2025.

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Transport costs

Global shipping and air freight

- The world container freight rate index increased by 13.4% between June 2025 and June 2026.
- Air freight rates increased by 34% compared to June 2025.

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Packaging

Wood and paper

- In June 2026, the producer price index of wooden containers increased by 4% compared with June 2025.
- Producer price indices of pulp, paper and paperboard decreased by 2% compared to June 2025.

Plastics and metal

- The producer price index of plastic packing goods increased by 7% compared to June 2025.
- The producer price index of light metal packaging increased by 1% compared to June 2025.

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Machinery for processing

- The producer price index of machinery for food and drink processing increased by 2% compared to June 2025.

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Labour

Manufacturing job vacancy rate continues to decline

- The EU manufacturing job vacancy rate declined by 6% year-on-year in Q2 2026.
- In Q2 2026, variations in the job vacancy rate ranged from 4.1% in the Netherlands to 0.5% in Romania and Spain.

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Agricultural raw materials

- The FAO Food Price Index was 1.5% higher than a year earlier.
- For further details, please see the table under this section.

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Animal feed

- In June 2026, the producer price index of prepared animal feeds was down 1% compared to June 2025.

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Fertilizers

- In June 2026, diammonium phosphate, triple superphosphate and urea prices were respectively 10%, 15% and 8% higher than a year earlier.

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Methodology

The EU food and drink industry is identified by NACE Rev.2 codes C10 (manufacture of food products) and C11 (manufacture of beverages).

Sources

European Commission, Eurostat data and indices
https://ec.europa.eu/eurostat/home

European Commission, Eurostat statistics explained
https://ec.europa.eu/eurostat/statistics-explained/index.php?title=Main_Page

European Commission, Eurostat short-term statistics
https://ec.europa.eu/eurostat/data/database

European Commission, Eurostat, labour markets
https://ec.europa.eu/eurostat/databrowser/view/jvs_q_nace2/default/table?lang=en

The World Bank, Commodity markets, monthly prices
https://www.worldbank.org/en/research/commodity-markets

Note on indicators

- **Producer Prices Index (PPI)**
  The PPI for a specific economic activity measures the monthly change in the trading price of products and related services. The PPI is an output index - it measures price changes from the seller's perspective. The prices collected in period *t* should refer to orders booked during period *t* (at the moment of the order) and not the moment when the commodities leave the factory gates.
- **Job vacancy**
  A job vacancy is defined as a paid post that is newly created, unoccupied, or about to become vacant:
  - for which the employer is taking active steps and is prepared to take further steps to find a suitable candidate from outside the enterprise concerned; and
  - which the employer intends to fill either immediately or within a specific period of time.

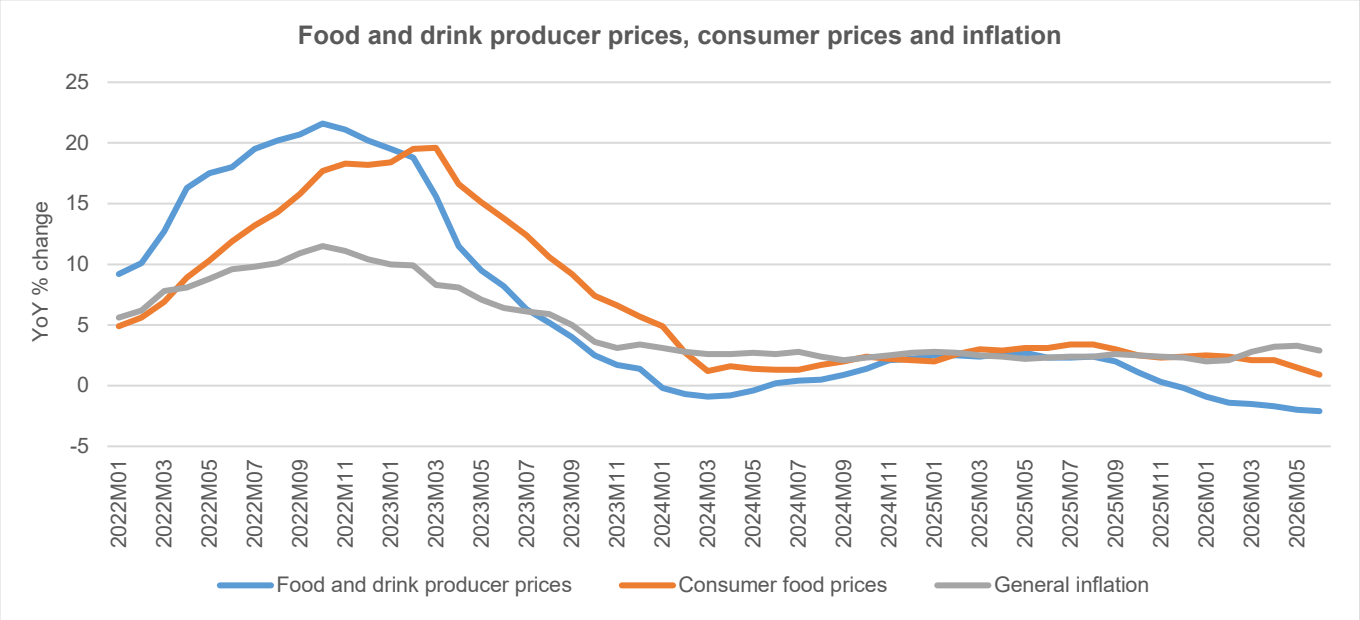
  Job vacancy represents the unmet demand for labour.

For more information on FoodDrinkEurope and its activities, including the Quarterly Economic Bulletin, please visit: www.fooddrinkeurope.eu

INPUT COST BULLETIN

Annex

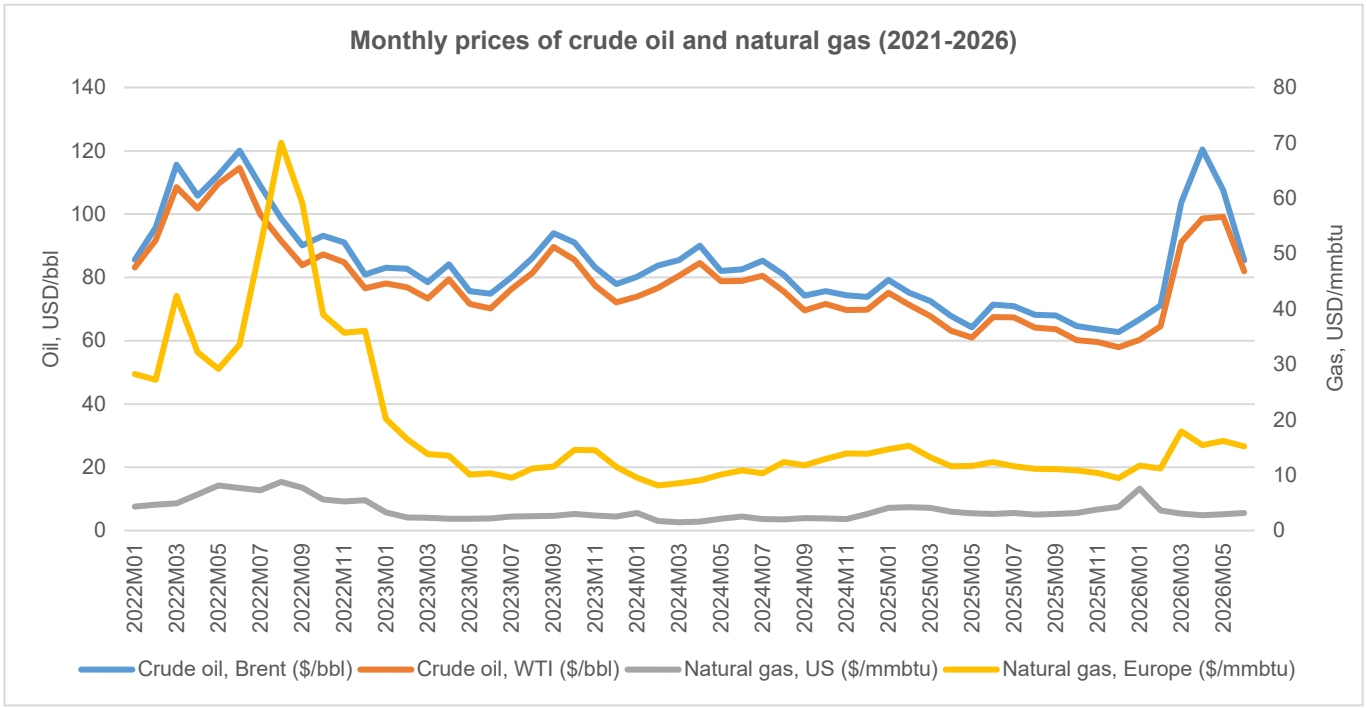
Food and drink producer prices, consumer prices and inflation



	Food and drink producer prices	Consumer food prices	Inflation
		2026M06 / 2025M06 (% change)	
EU	-2.1	0.9	2.9
Austria	-0.8	1.4	3.2
Belgium	-4.6	-0.4	3.3
Bulgaria	2.5	2.2	5.2
Croatia	-0.7	0.7	4.2
Cyprus	na	4.6	4.1
Czech Republic	-4.6	-3.8	1.1
Denmark	-0.7	-1.5	1.8
Estonia	na	-1.5	2
Finland	1.4	0.3	2.7
France	-0.6	0.9	2
Germany	-4.1	0.6	2.4
Greece	1.6	2.6	3.9
Hungary	-5.6	-3	2.1
Ireland	2.4	0.5	3.2
Italy	-1.5	1.8	3
Latvia	na	-1.1	3.3
Lithuania	-3.3	-0.5	5.4
Luxembourg	na	1.1	3.7
Malta	na	1.5	2
Netherlands	-6.5	-0.6	2.5
Poland	-4.5	-0.2	3
Portugal	na	3.1	3.1
Romania	4	5.1	9.2
Slovakia	na	-1.1	3.5
Slovenia	0.9	0.6	3.7
Spain	-0.4	2	3.6
Sweden	0.4	-6.2	1

Source: Eurostat

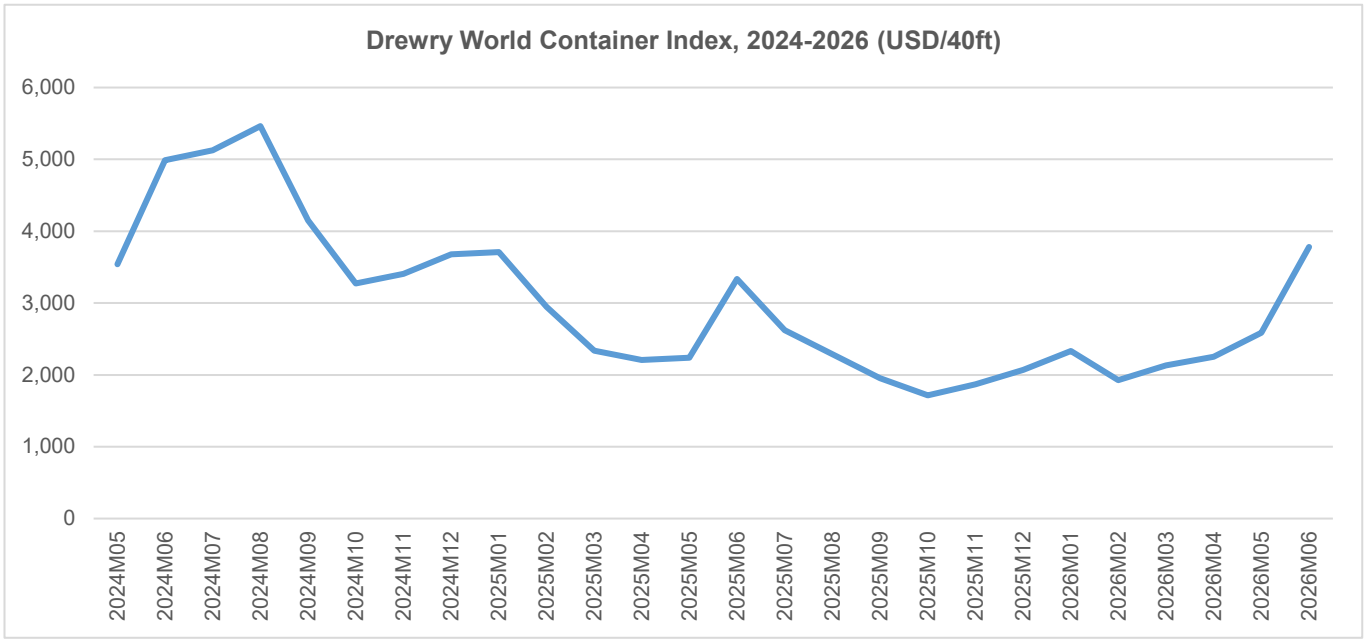
Energy prices



Source: World Bank Commodity Price Data

	Crude oil, Brent (USD/bbl)	Crude oil, WTI (USD/bbl)	Natural gas, Europe (USD/mmbtu)	Natural gas, US (USD/mmbtu)
2024M06	83	79	11	3
2024M07	85	81	10	2
2024M08	81	76	12	2
2024M09	74	70	12	2
2024M10	76	72	13	2
2024M11	74	70	14	2
2024M12	74	70	14	3
2025M01	79	75	15	4
2025M02	75	71	15	4
2025M03	73	68	13	4
2025M04	68	63	12	3
2025M05	64	61	12	3
2025M06	71	67	12	3
2025M07	71	67	12	3
2025M08	68	64	11	3
2025M09	68	64	11	3
2025M10	65	60	11	3
2025M11	64	60	10	4
2025M12	63	58	9	4
2026M01	67	60	12	8
2026M02	71	65	11	4
2026M03	104	91	18	3
2026M04	120	99	15	3
2026M05	108	99	16	3
2026M06	85	82	15	3

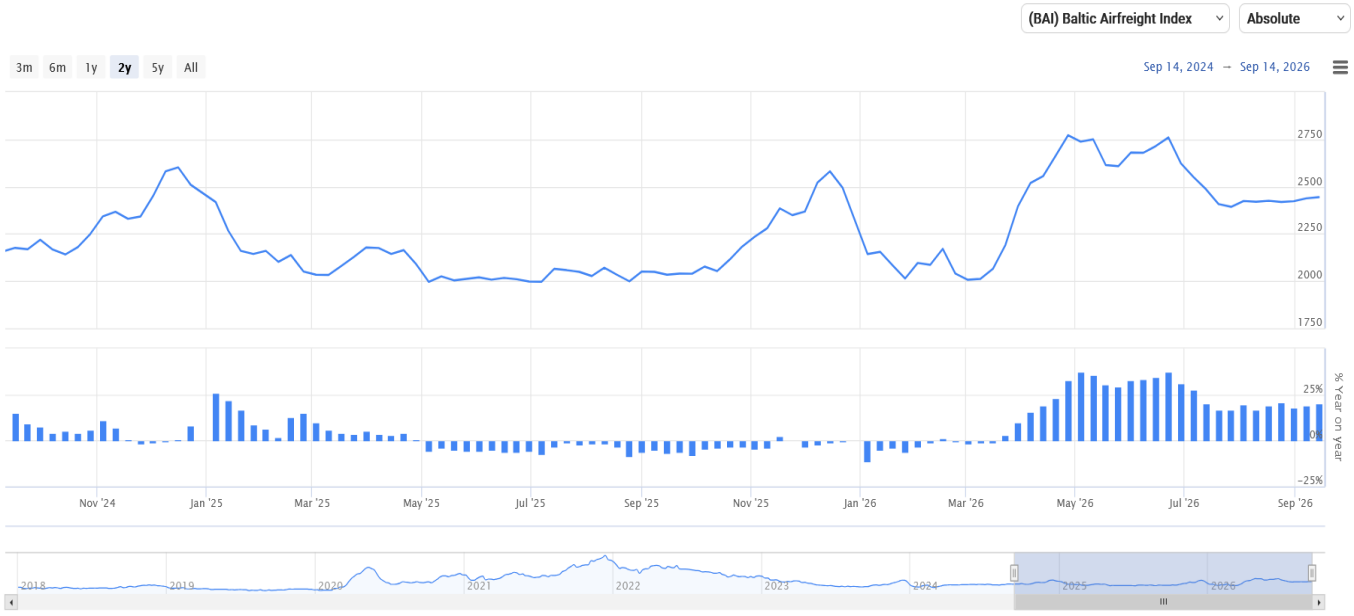
Transport costs



Source: Drewry World Container Index

The World Container Index, otherwise known by the acronym, WCI, reports actual spot container freight rates for major East West trade routes. The weekly updated Index consists of 8 route-specific indices representing individual shipping routes and a composite index. All indices are reported in USD per 40ft container.
The World Container Index is a composite of the 8 route indices weighted for volume on each of the routes representative trade.

Air freight index

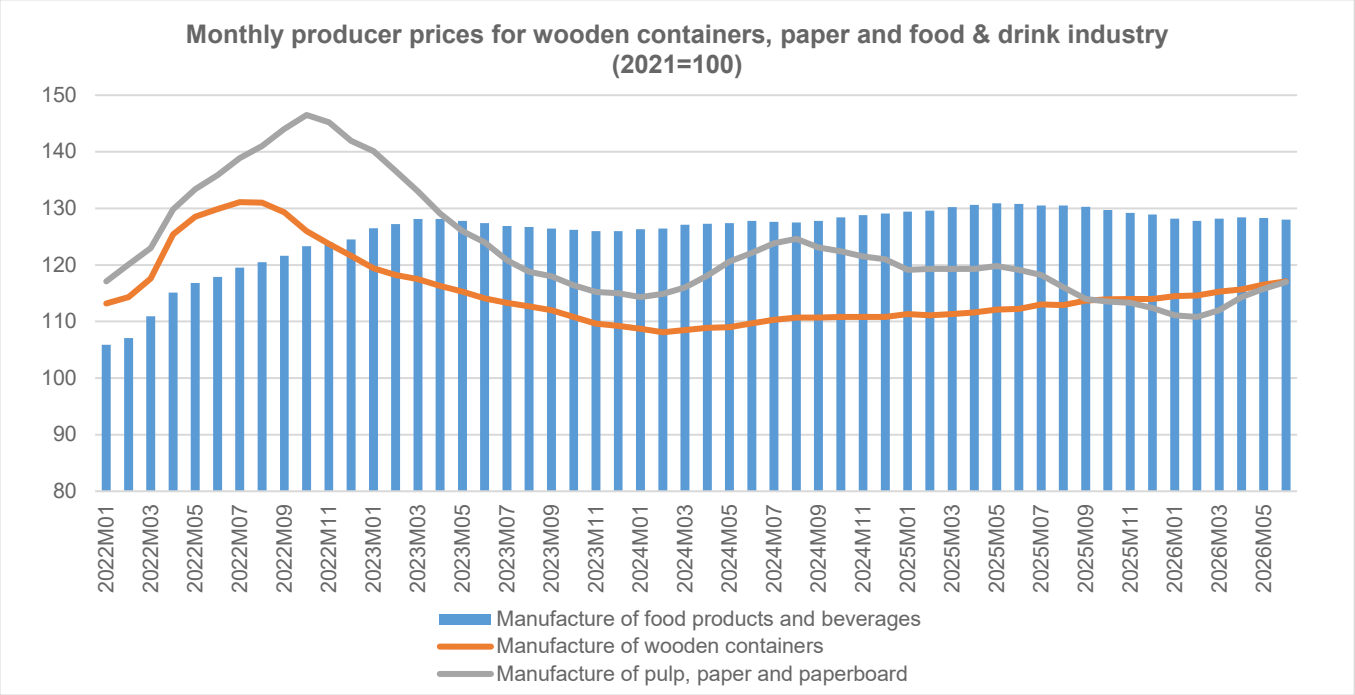


Source: Baltic airfreight index

The Baltic Exchange Airfreight Index (BAI) - powered by TAC data - reflects the price per kilogram of general cargo flown on 17 key trade lanes, from origin airport to destination region. The Baltic Air Freight Indices (BAI) reflect weekly transactional rates for general cargo as provided by freight forwarders. The data includes a headline index - the BAI Index - a weighted average of the 17 underlying destination basket routes, as well as six outbound indices - a weighted average of the destination baskets from each of the six origin airports.

Packaging

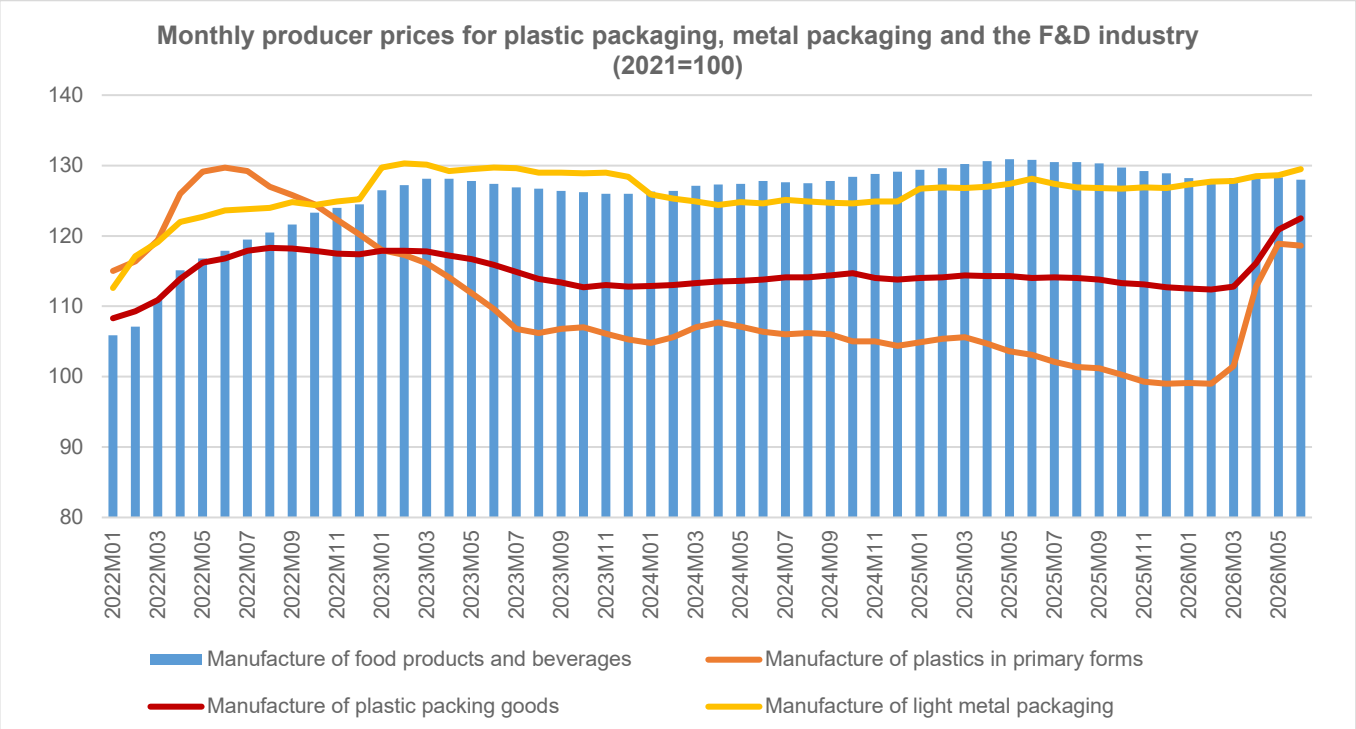
Wood and paper industries



Source: Eurostat (STS)

	Manufacture of wooden containers	Manufacture of pulp, paper and paperboard
2024M06	110	122
2024M07	110	124
2024M08	111	125
2024M09	111	123
2024M10	111	122
2024M11	111	122
2024M12	111	121
2025M01	111	119
2025M02	111	119
2025M03	111	119
2025M04	112	119
2025M05	112	120
2025M06	112	119
2025M07	113	118
2025M08	113	116
2025M09	114	114
2025M10	114	113
2025M11	114	112
2025M12	114	111
2026M01	115	111
2026M02	115	111
2026M03	115	112
2026M04	116	114
2026M05	117	116
2026M06	117	117

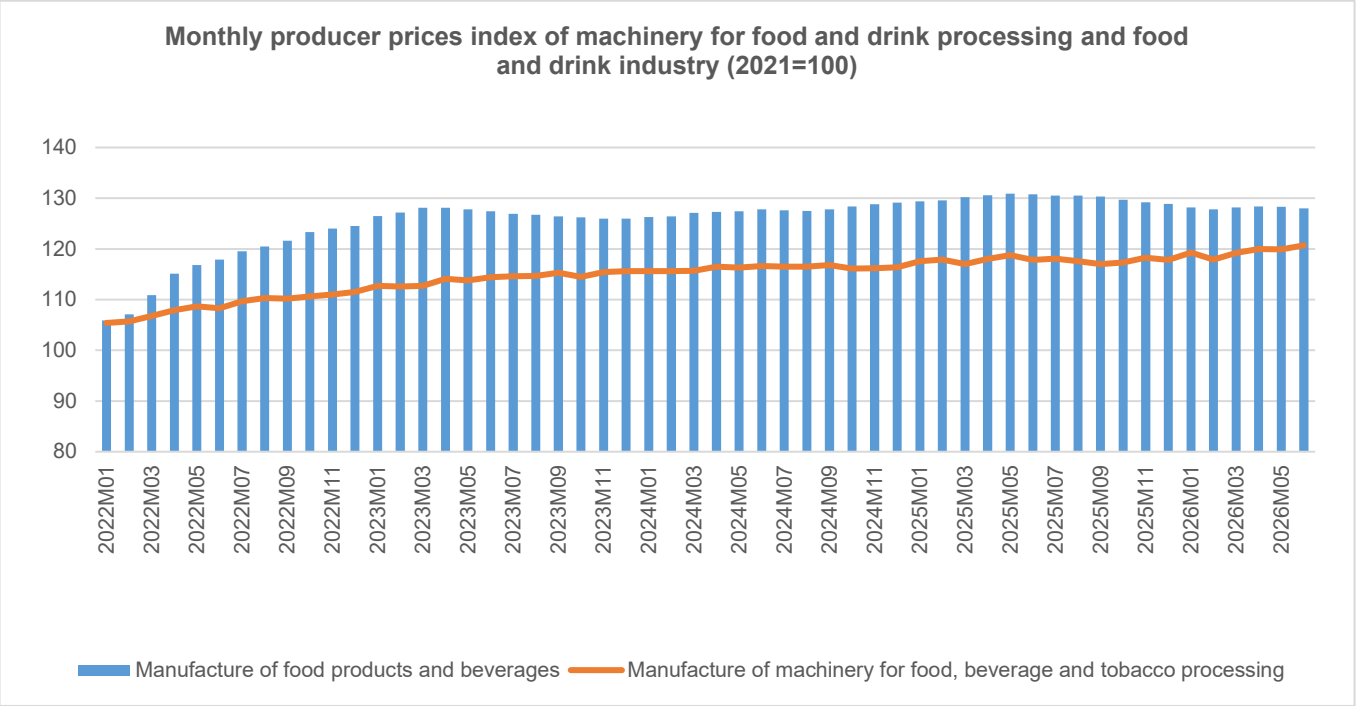
Plastic and metal industries



Source: Eurostat (STS)

	Manufacture of plastics in primary forms	Manufacture of plastic packing goods	Manufacture of light metal packaging
2024M06	106	114	125
2024M07	106	114	125
2024M08	106	114	125
2024M09	106	114	125
2024M10	105	115	125
2024M11	105	114	125
2024M12	105	114	125
2025M01	105	114	127
2025M02	105	114	127
2025M03	106	114	127
2025M04	105	114	127
2025M05	104	114	127
2025M06	103	114	128
2025M07	102	114	127
2025M08	101	114	127
2025M09	101	114	127
2025M10	100	113	127
2025M11	99	113	127
2025M12	99	113	127
2026M01	99	113	127
2026M02	99	112	128
2026M03	102	113	128
2026M04	113	116	129
2026M05	119	121	129
2026M06	119	123	130

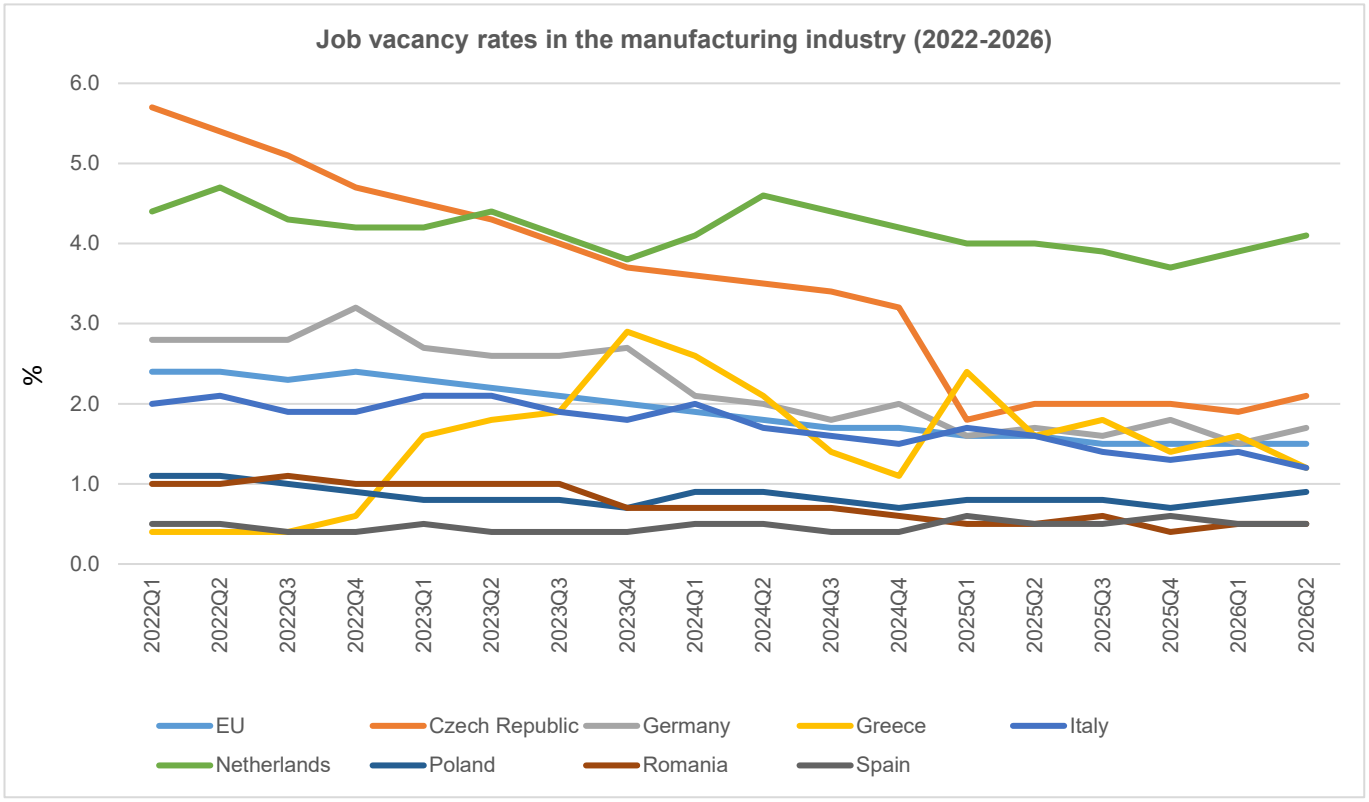
Machinery for food and drink processing



Source: Eurostat (STS)

	Manufacture of machinery for food, beverage and tobacco processing
2024M06	117
2024M07	117
2024M08	117
2024M09	117
2024M10	116
2024M11	116
2024M12	116
2025M01	118
2025M02	118
2025M03	117
2025M04	118
2025M05	119
2025M06	118
2025M07	118
2025M08	118
2025M09	117
2025M10	117
2025M11	118
2025M12	118
2026M01	119
2026M02	118
2026M03	119
2026M04	120
2026M05	120
2026M06	121

Labour



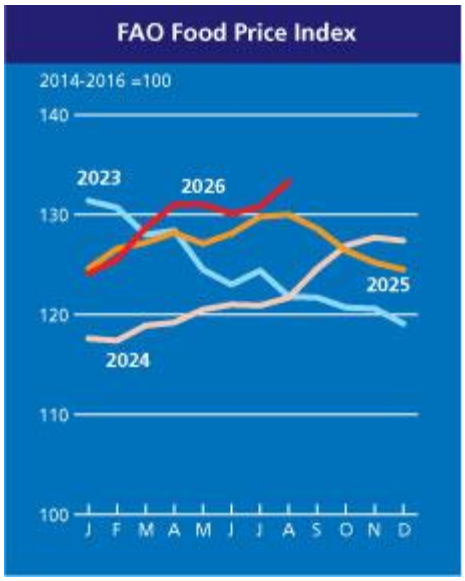
Source: Eurostat (Job vacancy statistics)

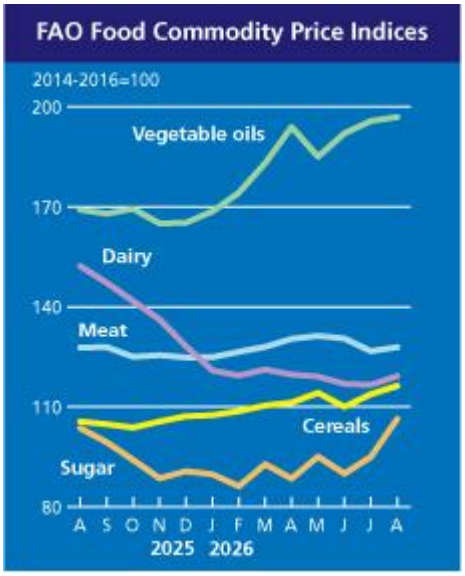
Job vacancy rate in the manufacturing industry (%)

	2025Q2	2025Q3	2025Q4	2026Q1	2026Q2
EU	1.6	1.5	1.5	1.5	1.5
Czech Republic	2	2	2	2	2
Germany	1.7	1.6	1.8	1.5	1.7
Greece	1.6	1.8	1.4	1.6	1.2
Italy	1.6	1.4	1.3	1.4	1.2
Netherlands	4	3.9	3.7	3.9	4.1
Poland	0.8	0.8	0.7	0.8	0.9
Romania	0.5	0.6	0.4	0.5	0.5
Spain	0.5	0.5	0.6	0.5	0.5

Source: Eurostat

Agricultural raw materials





Source: FAO Food Price Index

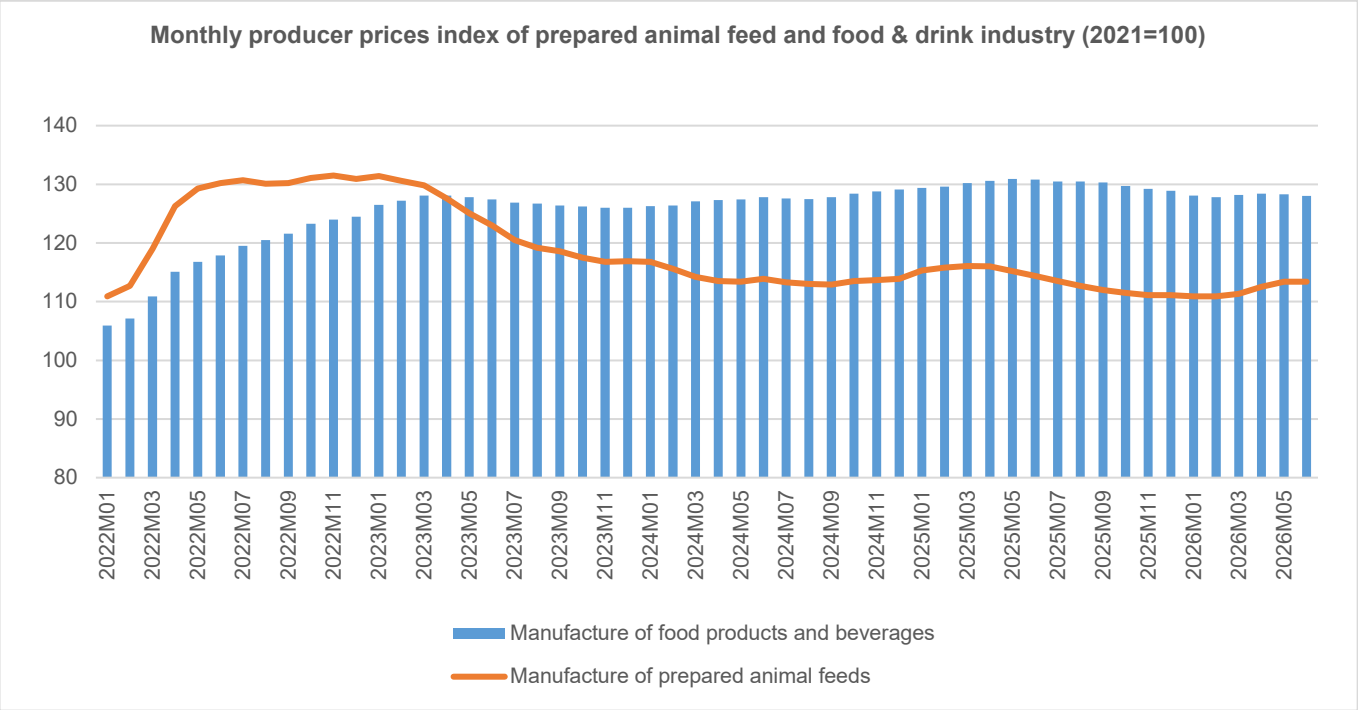
Agricultural commodity prices (June 2026)

	EU			WORLD			
	Monthly average	Annual change	Monthly change	Monthly average		Annual change	Monthly change
	EUR/T	%	%	*USD/T*	EUR/T	%	%
CEREALS							
Maize	210	-1.8%	1.5%	196	169	-2.2%	-8.2%
Soft wheat	194	-0.1%	-0.5%	243	209	8.7%	-5.7%
MEAT							
Beef	6,581	-1.6%	-1.4%	7,460	6,422	9.3%	-5.4%
Pork	1,569	-26.3%	-3.1%	2,822	2,429	-7.4%	-2.2%
Poultry	3,012	-1.5%	2.2%	1,414	1,217	-4.5%	3.4%
DAIRY							
Butter	3,909	-47%	-1.3%	5,906	5,084	-27.7%	0.8%
SMP	2,729	12.4%	-2.2%	3,669	3,158	26.1%	1.6%
WMP	3,240	-25.5%	-3%	3,675	3,163	-12.8%	-0.6%
Cheese*	3,145	-32.1%	-0.1%	4,600	3,960	-10.2%	-1%
SUGAR							
White sugar	501	-6.5%	-0.8%	449	386	-7%	2.8%

**Cheddar cheese*

Sources:
https://agridata.ec.europa.eu/extensions/DashboardPrice/DashboardMarketPrices.html (EU)
https://fpma.fao.org/giews/fpmat4/#/dashboard/tool/international; https://www.worldbank.org/en/research/commodity-markets; https://www.ers.usda.gov/data-products/sugar-and-sweeteners-yearbook-tables; https://www.clal.it/en/index.php; https://www.fao.org/markets-and-trade/commodities-overview/basic-foods/fao-meat-price-index/en (World)

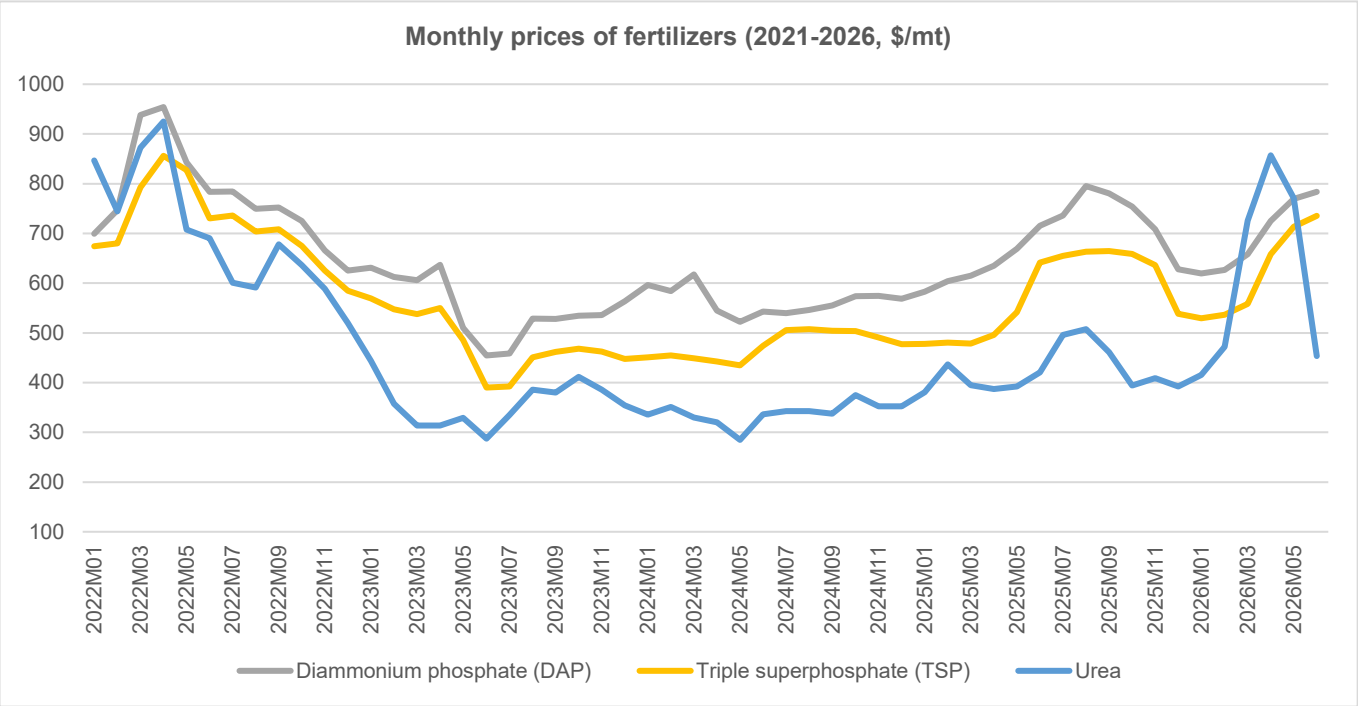
Animal feed



Source: Eurostat (STS)

	Manufacture of prepared animal feeds
2024M06	114
2024M07	113
2024M08	113
2024M09	113
2024M10	114
2024M11	114
2024M12	114
2025M01	115
2025M02	116
2025M03	116
2025M04	116
2025M05	115
2025M06	114
2025M07	114
2025M08	113
2025M09	112
2025M10	112
2025M11	111
2025M12	111
2026M01	111
2026M02	111
2026M03	111
2026M04	113
2026M05	113
2026M06	113

Fertilisers



Source: World Bank Commodity Price Data

	Diammonium phosphate DAP ($/mt)	Triple superphosphate TSP ($/mt)	Urea ($/mt)
2024M06	543	474	336
2024M07	539	506	343
2024M08	546	507	343
2024M09	555	504	338
2024M10	573	504	375
2024M11	575	491	352
2024M12	568	478	352
2025M01	583	478	381
2025M02	604	481	437
2025M03	615	479	395
2025M04	635	496	387
2025M05	669	542	392
2025M06	715	641	421
2025M07	736	655	496
2025M08	795	663	508
2025M09	781	664	461
2025M10	754	659	394
2025M11	708	636	409
2025M12	628	539	393
2026M01	619	529	415
2026M02	627	536	472
2026M03	658	558	726
2026M04	725	658	857
2026M05	770	714	771
2026M06	784	736	453