

## ANALYSIS

10 October 2025

### Development of consumer price indices in Q3 of 2025

**In Q3 of 2025, consumer prices rose by 0.6% compared to the Q2 2025. In a year-on-year comparison, consumer prices rose by 2.5% in Q3 2025, which is 0.1 percentage points more than in Q2 2025.**

The quarter-on-quarter development of consumer prices in Q3 2025 was mainly influenced by price increases in 'recreation and culture' and 'housing, water, electricity, gas and other fuels'. To a lesser extent, prices also increased in most other divisions. The most significant drop in prices occurred in 'food and non-alcoholic beverages'. In 'recreation and culture', prices of package holidays rose by 18.6%. Prices of recreational and cultural services increased by 1.8%. In 'housing, water, electricity, gas and other fuels' prices of actual rentals for housing increased by 1.5%, heat and hot water by 0.8%. Owner occupied housing costs (imputed rental) increased by 1.6%. On the contrary, prices of electricity decreased by 0.8%, natural gas by 1.8% and solid fuels by 0.7%. In 'food and non-alcoholic beverages', prices of fruit increased by 8.1% and prices in milk, cheese and eggs by 0.9%. Prices of vegetables decreased by 7.7%, of which prices of potatoes were lower by 32.6%. Prices of bread and cereals rose by 0.2%, meat by 3.2%, oils and fats by 1.1% and non-alcoholic beverages by 1.0%. In 'restaurants and hotels', prices of catering services increased by 1.0% and accommodation services by 1.4%. In 'transport', prices of fuels and lubricants for personal transport equipment rose by 0.9% and transport services by 0.7%. Prices of motor cars were lower by 0.4%. The average month-on-month change in the overall consumer price index in Q3 2025 was 0.0%, in Q2 2025 it was 0.2%.

#### Consumer price indices (previous quarter = 100)

DIVISION	2024		2025		
	Q3	Q4	Q1	Q2	Q3
ÚHRN	100.5	100.1	101.3	100.5	100.6
Food and non-alcoholic beverages	100.5	101.0	102.6	101.0	99.5
Alcoholic beverages, tobacco	100.3	99.9	102.9	100.1	100.5
Clothing and footwear	98.8	101.5	97.8	100.1	98.8
Housing, water, electricity, gas and other fuels	100.5	100.6	100.4	100.5	100.6
Furnishings, household equipment and routine household maintenance	99.8	100.5	100.5	100.7	100.0
Health	100.9	99.3	101.5	101.7	100.5
Transport	98.4	98.9	101.0	99.0	100.2
Communication	100.0	100.1	100.0	100.1	100.3
Recreation and culture	104.7	96.5	102.8	99.8	105.1
Education	103.5	106.9	100.3	100.1	101.2
Restaurants and hotels	101.2	100.9	101.1	101.5	101.1
Miscellaneous goods and services	100.5	100.1	101.5	101.0	100.2

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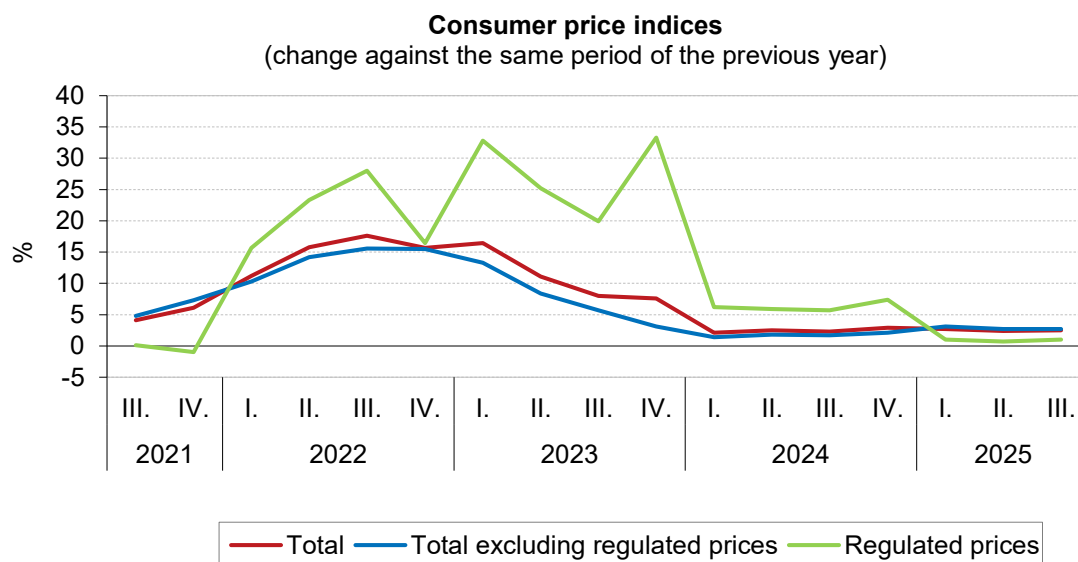
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Consumer prices rose by 2.5%, **year-on-year in the Q3 2025 compared to the Q3 2024**, i.e. by 0.1 percentage points more than in the Q2 2025. The acceleration in price growth was mainly caused by price development in 'transport'. The opposite effect was mainly due to the slowdown in price growth in 'food and non-alcoholic beverages'.

Changes in price developments in Q3 2025 were reflected in a year-on-year increase in market prices by 2.7% (in Q2 2025 growth also by 2.7%). Regulated prices increased by 1.0% (0.7% growth in Q2 2025).



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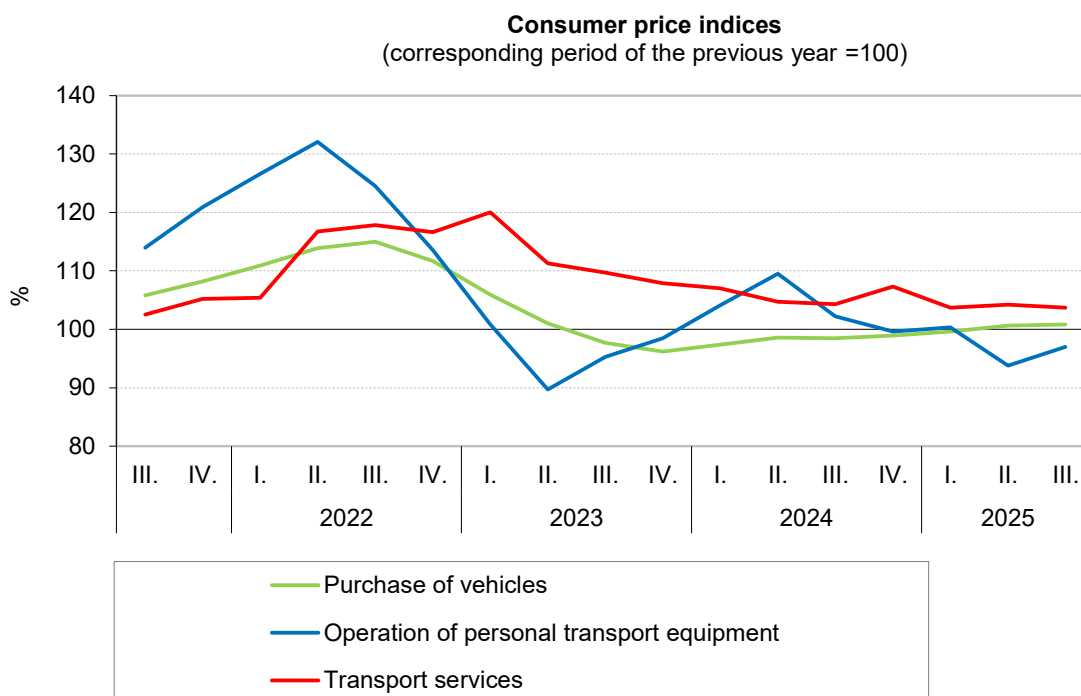
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In **'transport'**, prices of fuels and lubricants for personal transport equipment decreased by 6.7% in Q3 2025. The average price of Natural 95 petrol was CZK 34.32 per litre and the price of diesel was CZK 33.19 per litre in September. Prices of motor cars were higher by 0.9%.



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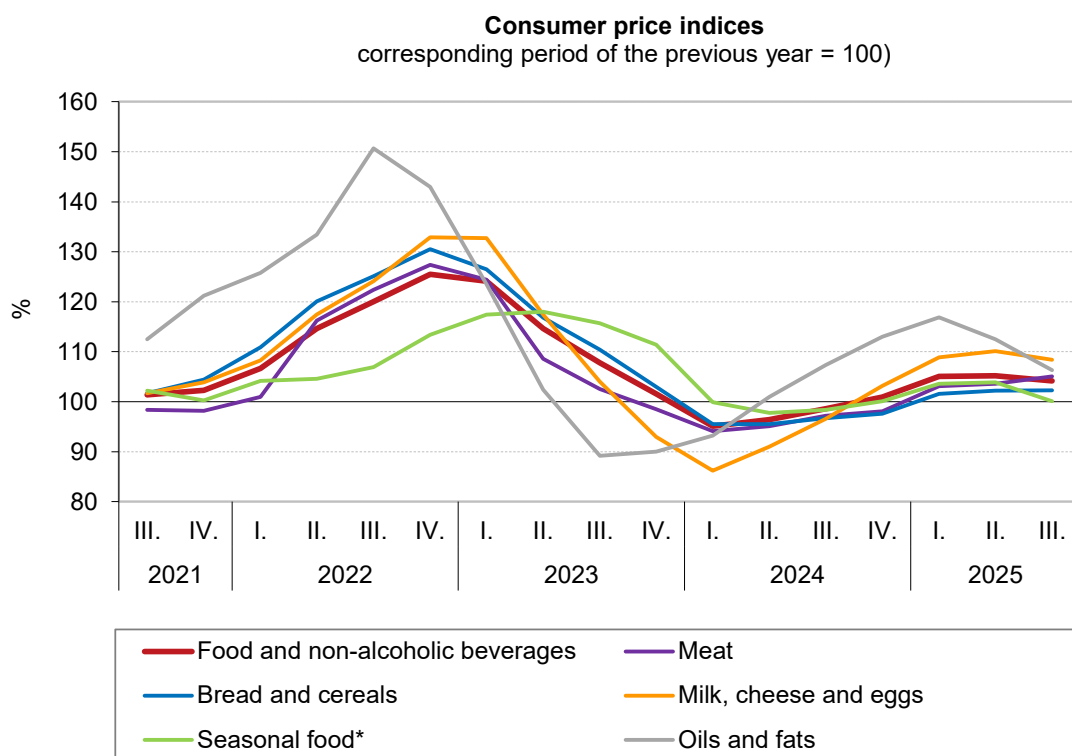
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In **'food and non-alcoholic beverages'**, prices of oils and fats increased by 6.3%, in Q3 2025, milk, cheese and eggs by 8.4%, fruit by 5.3%, bread and cereals by 2.3%, meat by 5.1%, coffee by 25.9%, year-on-year. Prices of vegetables fell by 4.1%, of which prices of potatoes were lower by 22.4%. Prices of sugar decreased by 21.9%.



\* Seasonal foods include fish and seafood, fruits and vegetables.

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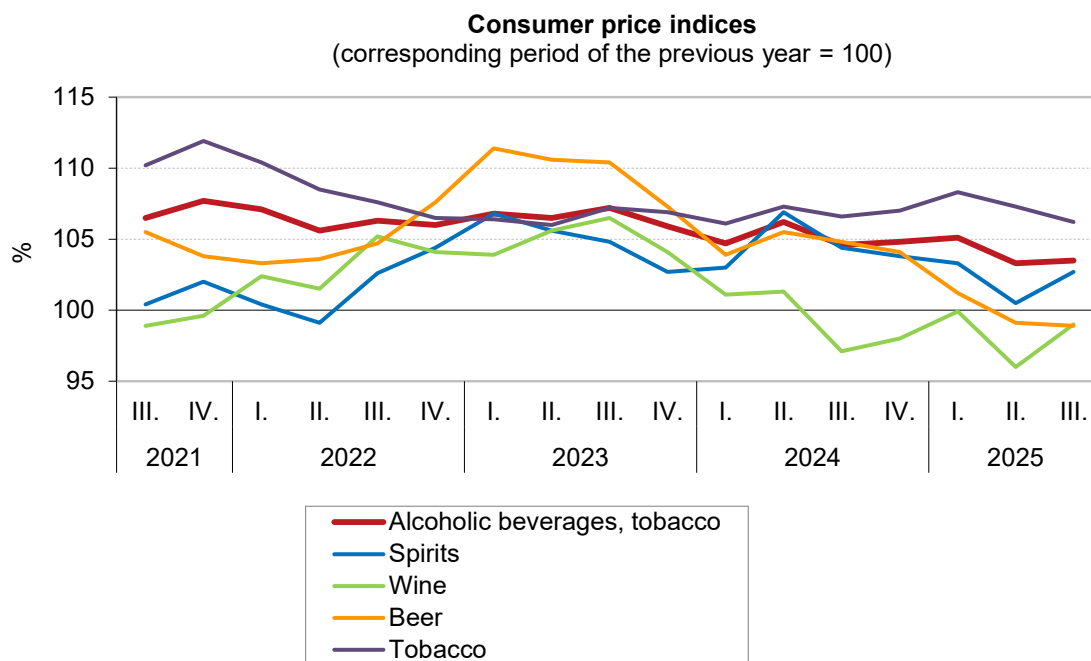
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In **'alcoholic beverages, tobacco'** prices of tobacco products increased by 6.2% and spirits by 2.7%. Prices of wine were lower by 1.0% and beer by 1.1%.



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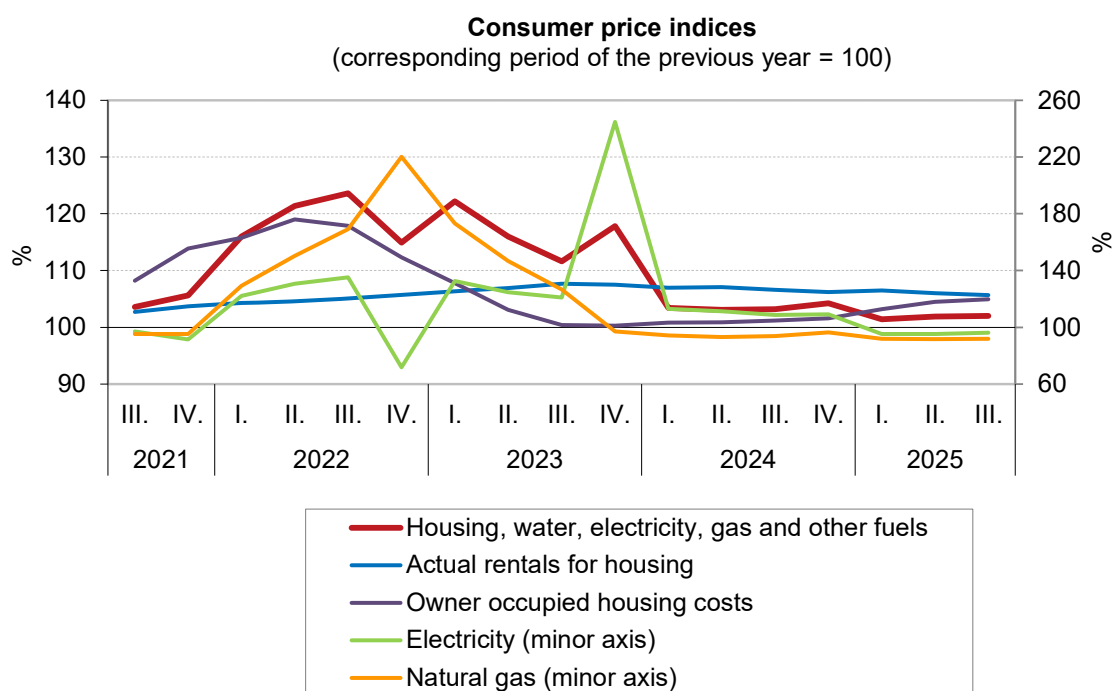
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In 'housing, water, electricity, gas and other fuels', prices of actual rentals for housing increased by 5.7%, products and services for maintenance and repair of the dwelling by 3.2%, water supply by 4.2%, sewage collection by 3.7%, solid fuels by 0.4%, heat and hot water by 3.2%. Owner occupied housing costs (imputed rental) was higher by 4.9%. Prices of electricity went down by 3.8% and natural gas by 8.1%.



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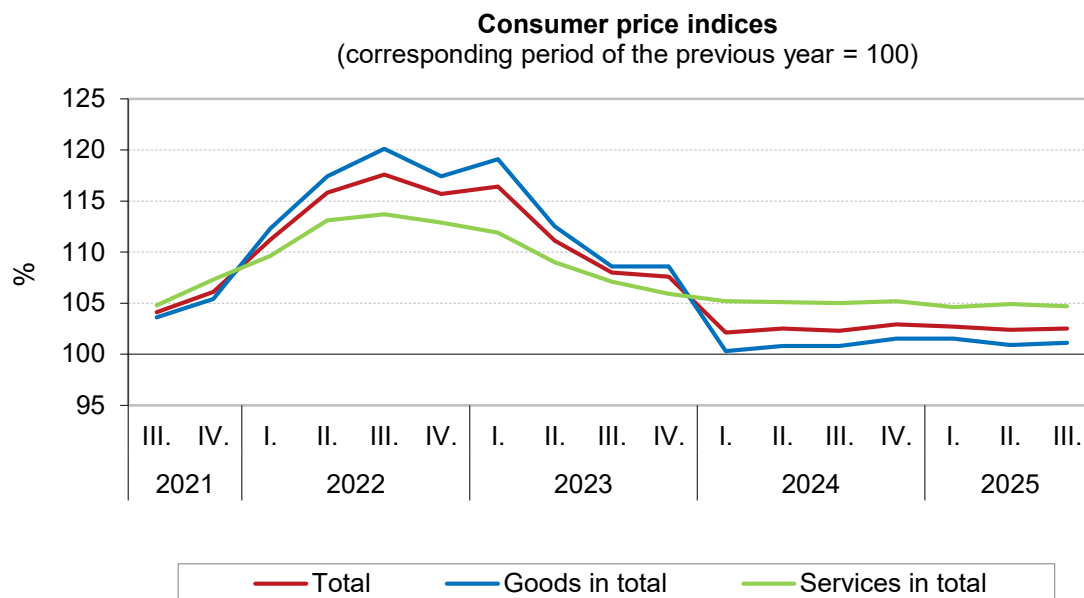
In '**restaurants and hotels**', prices of catering services increased by 4.5% and prices of accommodation services by 6.7%.

In '**miscellaneous goods and services**', prices of goods and services for personal care were lower by 0.5%.

In '**recreation and culture**', prices of package holidays increased by 5.1% and recreational and cultural services by 5.9%.

In '**furnishings, household equipment and routine household maintenance**', prices of furniture and furnishings increased by 2.9%. Prices of non-durable household goods went down by 3.2%.

The aforementioned fluctuations in consumer prices resulted in a rise in prices of **goods in total** by 1.1% and prices of **services** by 4.7%.



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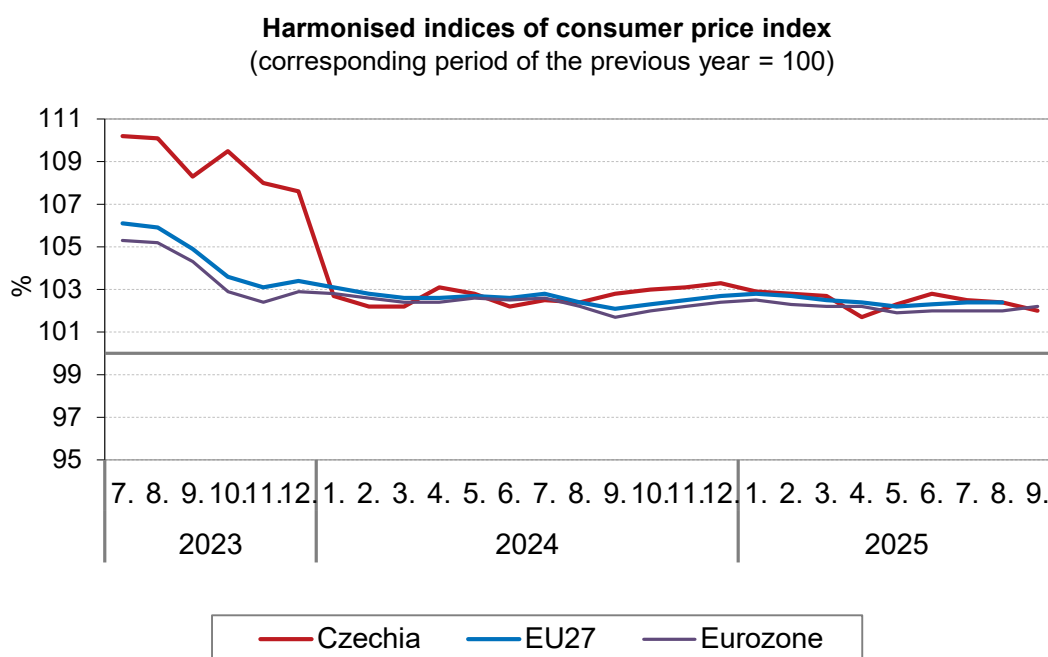
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### Harmonized index of consumer prices (HICP) <sup>1)</sup>

According to preliminary calculations, the HICP in Czechia in **September** decreased by 0.8% **month-on-month** and increased by 2.0% (2.4% in August), **year-on-year**. According to flash estimates of Eurostat, **the MUICP** (Monetary Union Index of Consumer Prices) in **September 2025** amounted to 2.2% year-on-year (2.0% in August), 2.4% in Germany and 4.6% in Slovakia. It was the highest in Estonia in September (5.2%) and the lowest in Cyprus, where the prices remained unchanged (year-on-year change 0.0%).

According to preliminary data of Eurostat, the **year-on-year** change in the average **harmonized index of consumer prices (HICP)** in the **EU27 member states** amounted to 2.4% in **August** as in July. In August, the rise in prices was the highest in Romania (8.5%) and the lowest in Cyprus, where the prices remained unchanged, year-on-year (0.0%).



<sup>1)</sup> Imputed rentals are excluded from the HICP.

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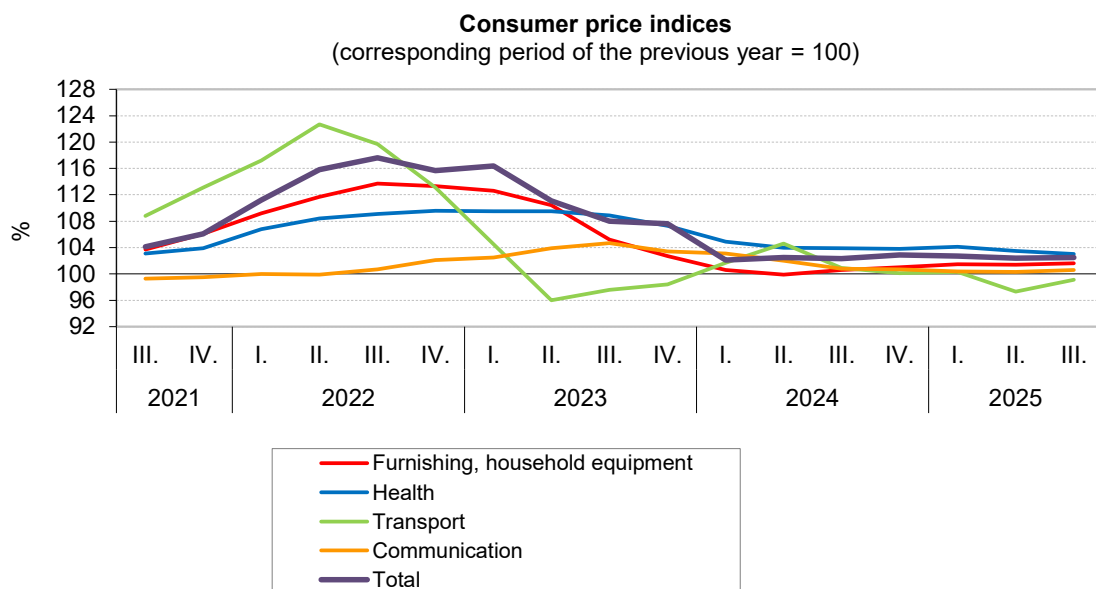
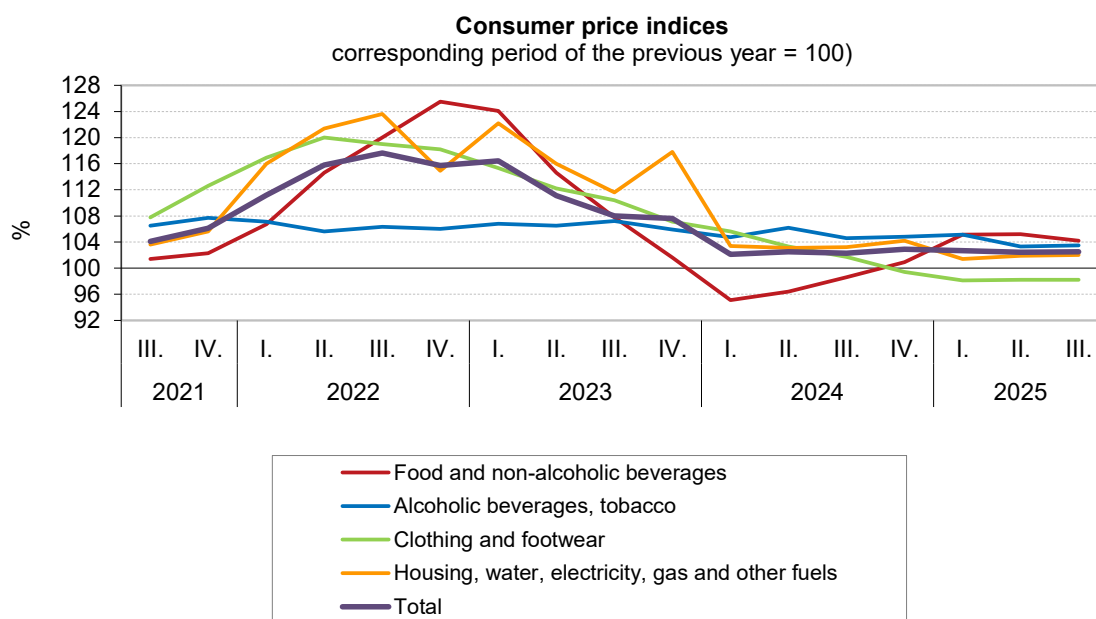
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### Development of the consumer price index broken down by ECOICOP divisions



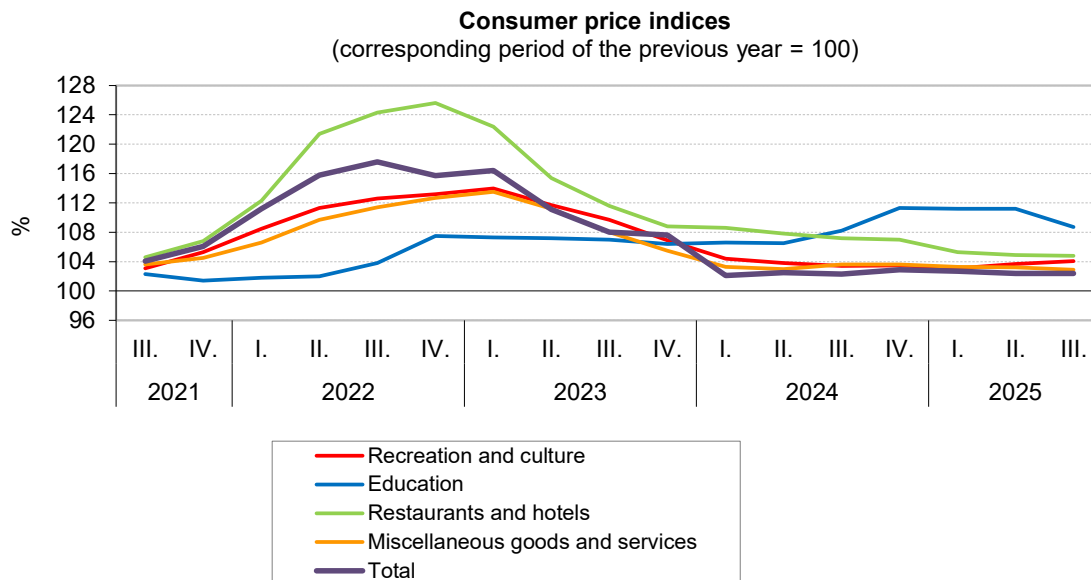
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### Consumer price indices in the Q3 2025

ECOICOP	Division	Constant weights of 2022 v %	2024		2025					
			corresponding period of the previous year = 100							
			3.Q	4.Q	1.Q	2.Q	July	August	September	3.Q
E00	<b>Total</b>	1000.0	102.3	102.9	102.7	102.4	102.7	102.5	102.3	102.5
	including									
E01	<b>Food and non-alcoholic beverages</b>	177.4	98.6	100.9	105.1	105.2	105.2	104.7	102.7	104.2
	of which :									
E01.11	Breads and cereals	28.4	96.7	97.6	101.6	102.2	102.2	102.6	102.1	102.3
E01.12	Meat	40.6	97.2	98.1	103.1	103.6	104.1	107.0	104.4	105.1
E02	<b>Alcoholic beverages, tobacco</b>	84.6	104.6	104.8	105.1	103.3	104.4	102.7	103.3	103.5
E03	<b>Clothing and footwear</b>	44.0	101.7	99.4	98.1	98.2	98.3	98.1	98.3	98.2
E04	<b>Housing, water, electricity, gas and other fuels</b>	258.4	103.2	104.2	101.4	101.9	102.1	102.0	102.0	102.0
	of which :									
E04.1	Actual rentals for housing	33.2	106.6	106.2	106.5	106.0	105.6	105.7	105.7	105.7
E04.2	Owner occupied housing costs (imputed rentals for housing)	103.4	101.2	101.6	103.2	104.5	104.9	104.9	104.9	104.9
E04.510	Electricity	44.3	108.6	109.2	95.2	95.3	96.0	95.9	96.5	96.2
E04.521	Natural gas and town gas	19.1	93.9	96.4	91.9	91.6	92.1	92.0	91.5	91.9
E05	<b>Furnishing, household equipment and routine household maintenance</b>	58.0	100.6	101.0	101.5	101.4	101.6	101.8	101.5	101.6
E06	<b>Health</b>	27.9	103.9	103.8	104.1	103.5	103.2	102.7	103.1	103.0
E07	<b>Transport</b>	105.6	100.9	100.1	100.3	97.3	98.3	98.9	100.2	99.1
	of which									
E07.22	Fuels and lubricants for personal transport equipment	35.4	96.5	92.7	95.6	87.9	91.2	92.4	96.4	93.3
E08	<b>Communication</b>	29.4	100.8	100.7	100.4	100.3	100.6	100.6	100.5	100.6
E09	<b>Recreation and culture</b>	78.2	103.4	103.5	103.1	103.7	103.9	104.2	104.1	104.1
	of which									
E09.60	Package holidays	18.7	102.8	105.5	103.0	105.2	105.0	105.3	105.0	105.1
E10	<b>Education</b>	6.2	108.2	111.3	111.2	111.2	111.3	111.2	104.2	108.7
E11	<b>Restaurants and hotels</b>	64.8	107.2	107.0	105.3	104.9	104.8	104.8	104.8	104.8
E12	<b>Miscellaneous goods and services</b>	65.5	103.6	103.6	103.3	103.2	102.8	103.0	102.9	102.9

Elaborated by Consumer Prices Statistics Unit of the CZSO

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