

ANALYSIS

13 January 2026

Development of consumer price indices in the Q4 2025 and in the year 2025

In Q4 of 2025, consumer prices decreased by 0.2% compared to Q3 2025. In a year-on-year comparison, consumer prices rose by 2.2% in Q4 2025, which is 0.3 percentage points less than in Q3 2025.

The quarter-on-quarter development of consumer prices in Q4 2025 was mainly influenced by price decreases in 'recreation and culture' and in 'food and non-alcoholic beverages'. The price increase occurred mainly in 'housing, water, electricity, gas and other fuels'. In 'recreation and culture' prices of package holidays decreased by 15.3%. In 'food and non-alcoholic beverages', prices of fruits fell by 3.6%, prices of oils and fats by 8.4%, prices of meat by 0.7% and prices of non-alcoholic beverages by 1.4%. Prices of vegetables fell by 0.8%, of which prices of potatoes were lower by 16.3%. Prices of bread and cereals increased by 0.5% and prices in group milk, cheese and eggs also by 0.5%. In 'housing, water, electricity, gas and other fuels', prices of actual rentals increased by 1.4%. Owner occupied housing costs (imputed rentals) increased by 1.6%. On the contrary, there was a decrease in prices of electricity by 1.7%, natural gas by 1.8% and solid fuels by 1.0%. In 'restaurants and hotels', prices of catering services increased by 1.0%, whereas prices of accommodation services were lower by 0.7%. In 'transport', prices of fuels and lubricants for personal transport equipment as well as prices of transport services decreased by 0.5%. The average month-on-month change in the aggregate consumer price index in Q3 and Q4 2025 was identically 0.0%.

Consumer price indices (previous quarter = 100)

DIVISION	2024	2025			
	Q4	Q1	Q2	Q3	Q4
TOTAL	100.1	101.3	100.5	100.6	99.8
Food and non-alcoholic beverages	101.0	102.6	101.0	99.5	99.3
Alcoholic beverages tobacco	99.9	102.9	100.1	100.5	100.6
Clothing and footwear	101.5	97.8	100.1	98.8	101.2
Housing, water, electricity, gas and other fuels	100.6	100.4	100.5	100.6	100.5
Furnishings, household equipment and routine household maintenance	100.5	100.5	100.7	100.0	100.1
Health	99.3	101.5	101.7	100.5	99.4
Transport	98.9	101.0	99.0	100.2	99.9
Communication	100.1	100.0	100.1	100.3	100.0
Recreation and culture	96.5	102.8	99.8	105.1	96.3
Education	106.9	100.3	100.1	101.2	102.3
Restaurants and hotels	100.9	101.1	101.5	101.1	100.9
Miscellaneous goods and services	100.1	101.5	101.0	100.2	100.5

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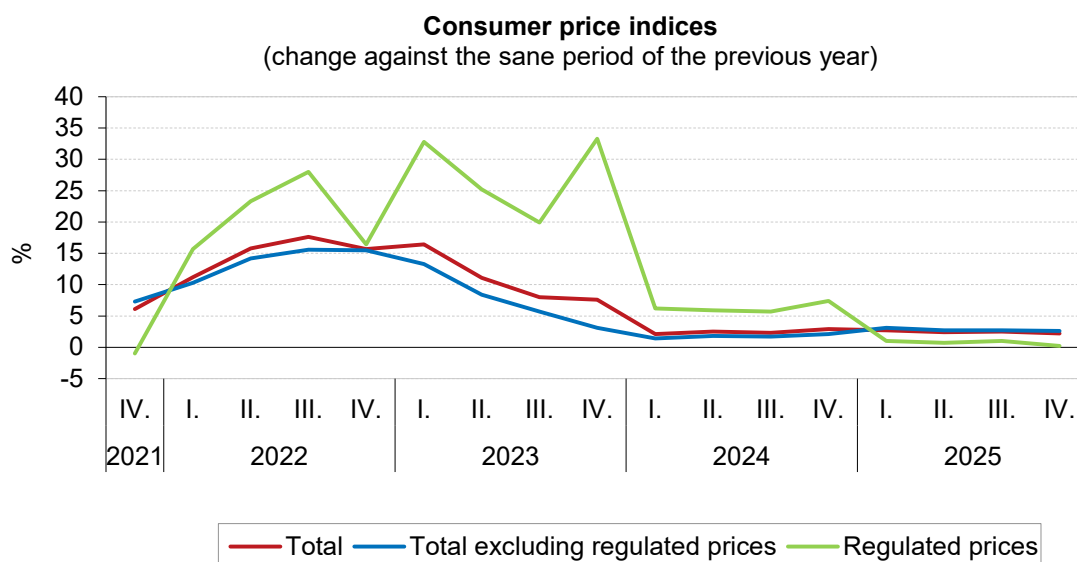
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Consumer prices rose by 2.2%, **year-on-year (y-o-y), in Q4 2025** compared to **Q4 2024**, i.e. by 0.3 percentage points less than in Q3 2025. The slowdown in price growth was mainly influenced by price developments in 'food and non-alcoholic beverages'. The opposite effect was particularly due to the transition from a decline to a slight increase in 'transport'.

Changes in the development of prices in Q4 2025 were reflected in the year-on-year growth of market prices by 2.6% (2.7% growth in Q3 2025). Regulated prices increased by 0.2% (1.0% growth in Q3 2025).



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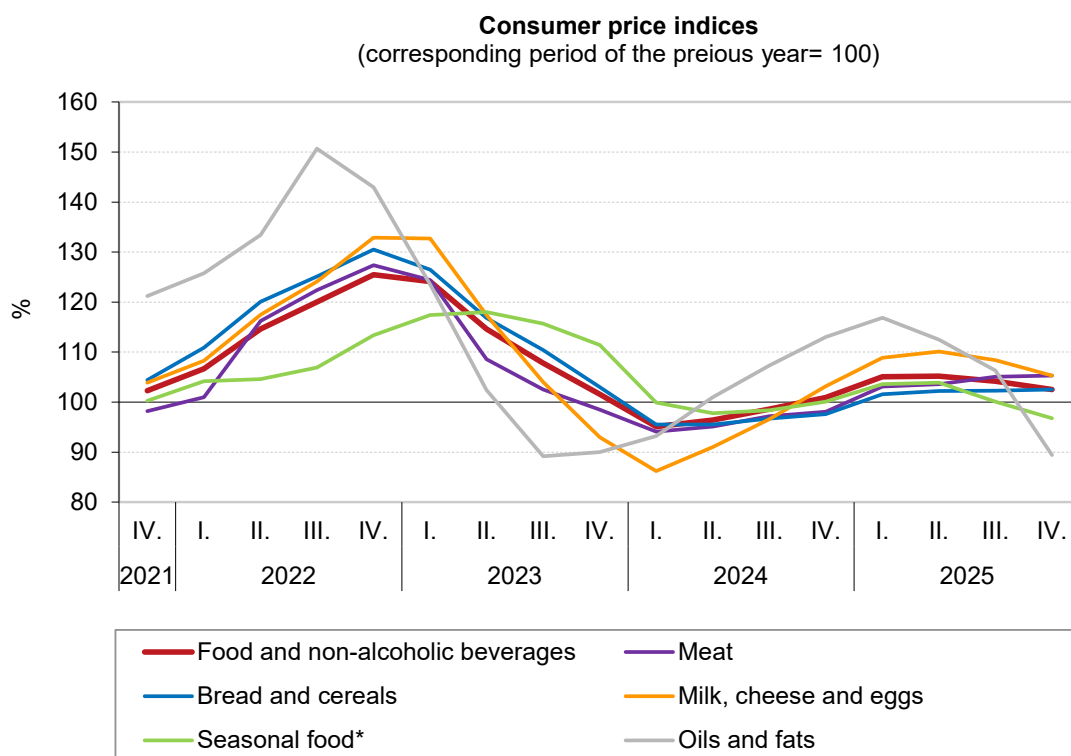
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In **'food and non-alcoholic beverages'**, prices of oils and fats in Q4 2025 decreased year-on-year by 10.6%, fruit by 4.9%, vegetables by 3.0%, of which prices of potatoes by 27.2%. Prices of sugar fell by 2.1%, Prices of bread and cereals increased by 2.5%, meat by 5.3%, coffee by 22.3%. Prices in group milk, cheese and eggs were higher by 5.3%.



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

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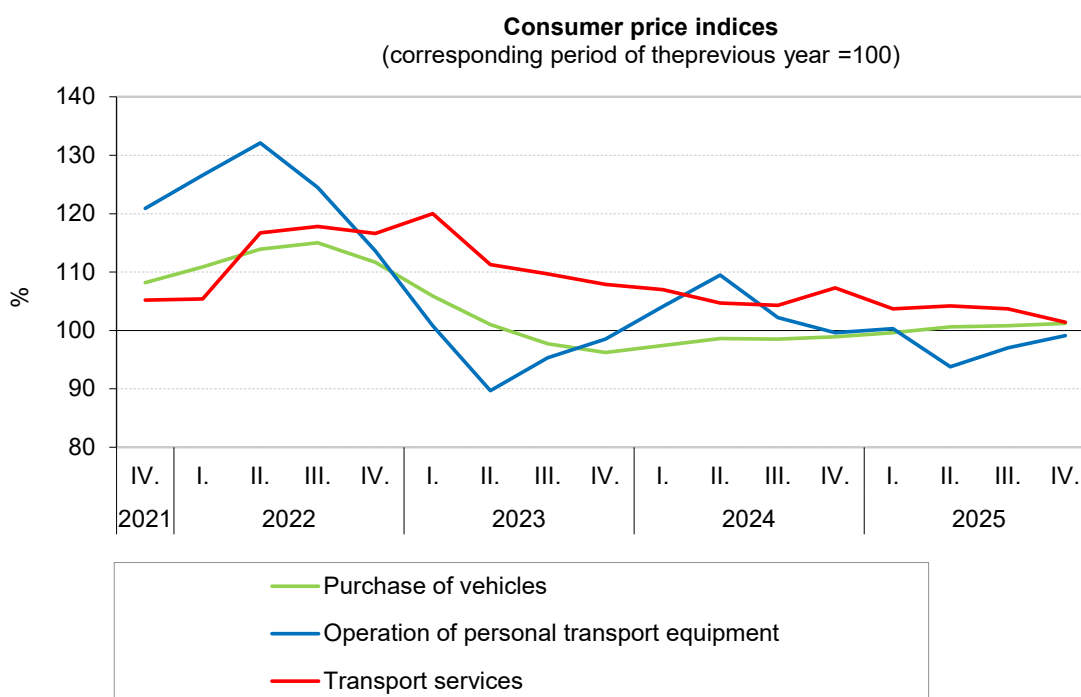
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In 'transport', prices of motor cars increased by 1.2% and transport services by 1.4%. Prices of fuels and lubricants for personal transport equipment fell by 3.6% in Q4 2025%. The average price of Natural 95 petrol was 33.88 CZK per litre and the price of diesel was 33.50 CZK per litre in December.



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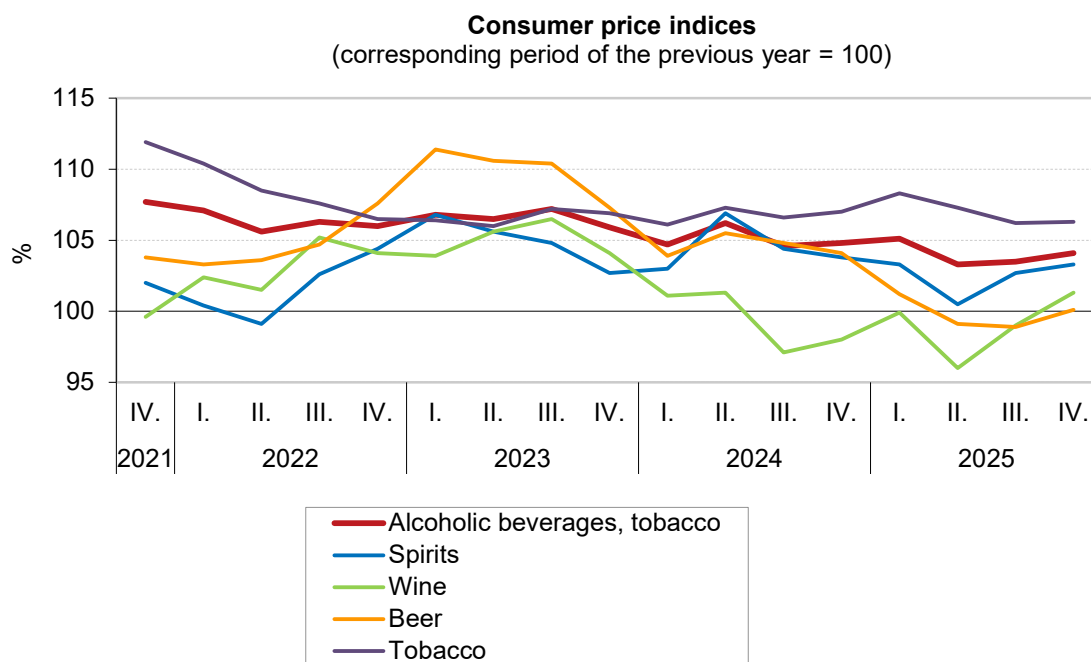
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In 'alcoholic beverages, tobacco' prices of tobacco products increased by 6.3%, wine by 1.3%, beer by 0.1% and spirits by 3.3%.



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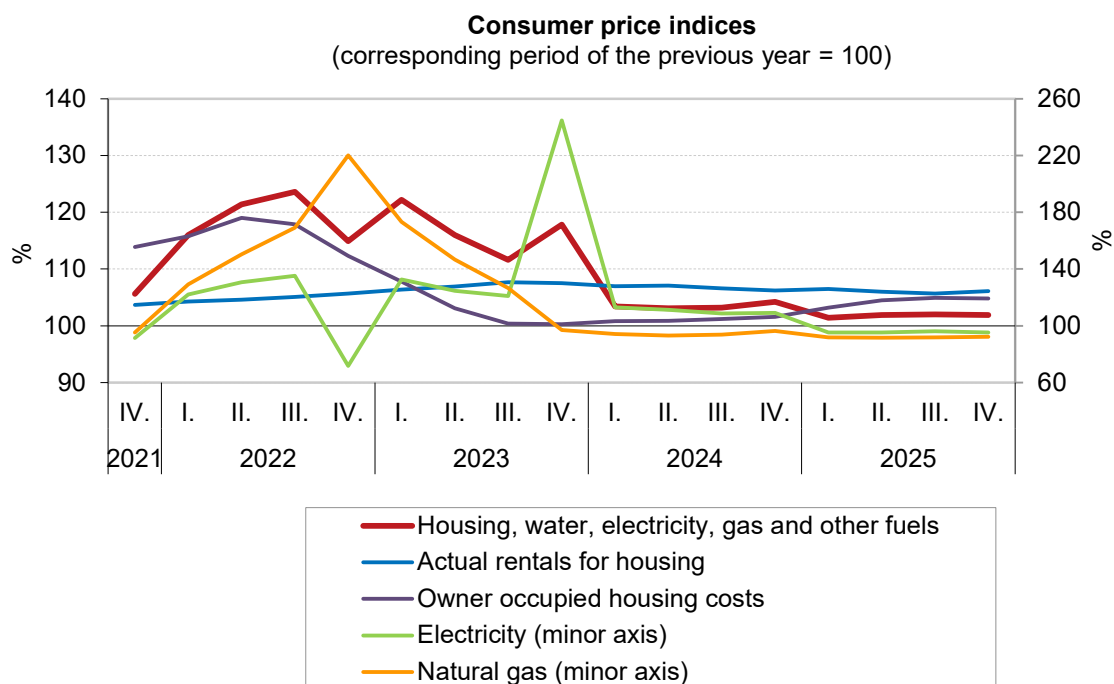
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In 'housing, water, electricity, gas and other fuels', prices of actual rentals for housing increased by 6.1%, materials and services for the maintenance and repair of the dwelling by 3.4%, water supply by 4.2%, sewage collection by 3.7%, heat energy by 1.7%. Owner occupied housing costs (imputed rentals) were higher by 4.8%. Prices of electricity fell by 4.6%, natural gas by 7.7% and solid fuels by 2.5%.



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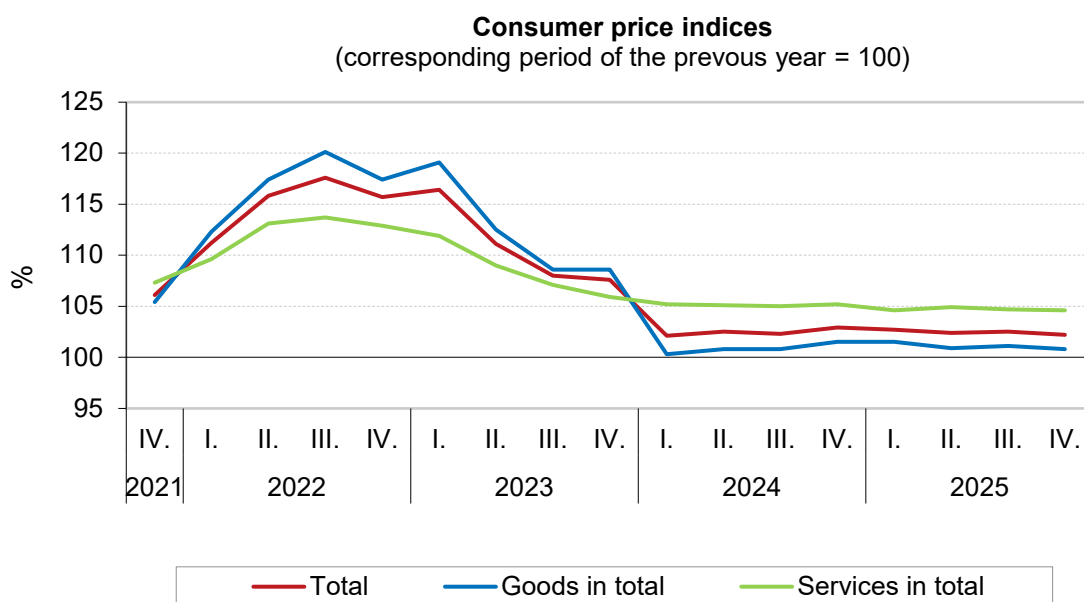
In **'restaurants and hotels'**, prices of catering services increased by 4.4% and prices of accommodation services by 6.7%.

In **'miscellaneous goods and services'**, prices of goods and services for personal care were higher by 0.8%.

In **'recreation and culture'**, prices of package holidays increased by 3.8% and recreational and cultural services by 6.7%.

In **'furnishings, household equipment and routine household maintenance'**, prices of furniture and furnishings increased by 2.6%. Prices of non-durable household goods decreased by 2.9%.

The aforementioned fluctuations in consumer prices resulted in a rise in prices of **goods in total** by 0.8% and prices of **services** by 4.6%.



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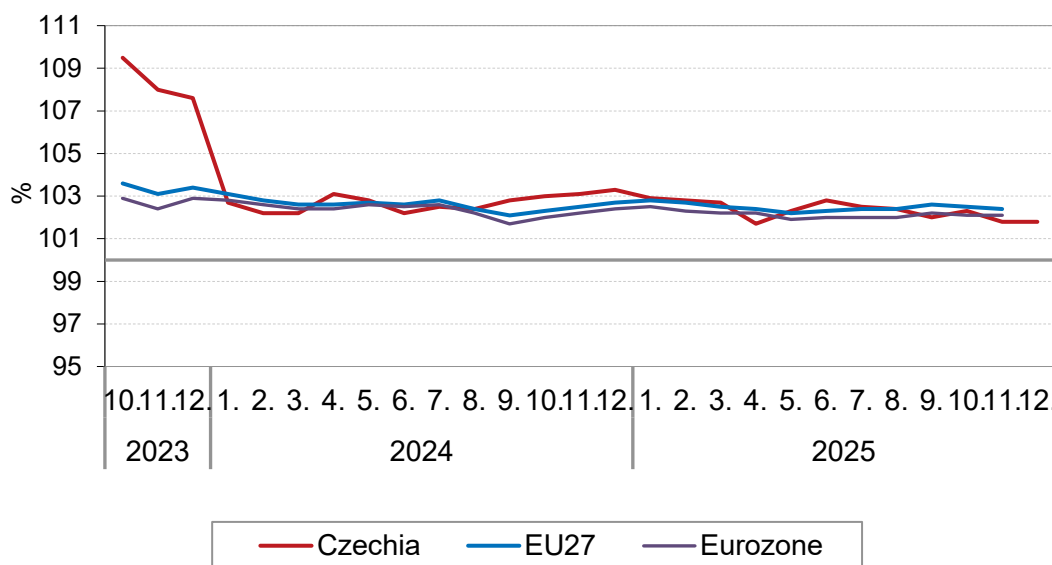
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Harmonized index of consumer prices (HICP) ¹⁾

According to preliminary calculations, the HICP in Czechia **in December** decreased by 0.3% **month-on-month** and increased by 1.8% (1.8% also in November), **year-on-year**. According to flash estimates of Eurostat, the MUICP (Monetary Union Index of Consumer Prices) **in December 2025** amounted to 2.0% year-on-year (2.1% in November), 2.0% in Germany. It was the highest in Slovakia and in Estonia in December (identically by 4.1%) and the lowest in Cyprus (0.1%).

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 November**, (0.1 percentage point down on October). In November, the rise in prices was the highest in Romania (8.6%) and the lowest in Cyprus (0.1%).

Harmonized indices of consumer price index
(corresponding period of the previous year = 100)



¹⁾ Imputed rentals are excluded from the HICP.

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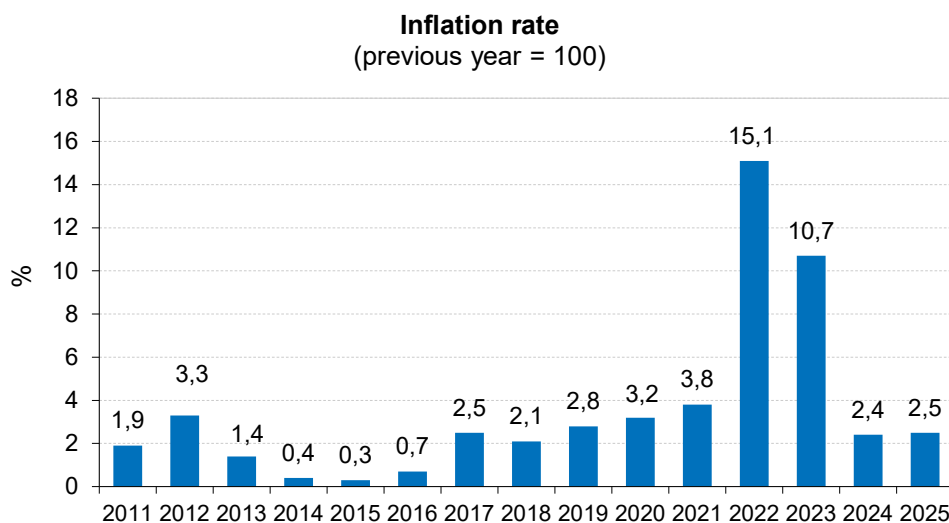
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Development of the consumer price index in 2025

The average inflation rate in 2025 reached 2.5%, which was by 0.1 percentage points more than in 2024. During 2025, the annual growth rate ranged between two and three percent, except for April (the lowest growth 1.8%). The highest annual growth was in June (2.9%).

The development of inflation in 2025 was mainly influenced by price growth in 'food and non-alcoholic beverages'. To a lesser extent, the rise in 'alcoholic beverages, tobacco', in 'housing, water, electricity, gas and other fuels' and in the most other divisions also influenced increasing inflation. In the opposite direction, i.e. on the reduction of the price level, the price development in 'clothing and footwear' and in 'transport' had an effect.

The development of prices in the individual divisions of the consumer basket was manifested by an increase in the prices of goods by a total of 1.1% and services by 4.7%.



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The share of the individual divisions of consumer basket on the overall price level in 2025 illustrates the breakdown of the aggregate increase in the consumer price index.

Breakdown of the year-on-year change in the consumer price index in 2025 in percentage points

DIVISION	
TOTAL	2.5
Food and non-alcoholic beverages	0.8
Alcoholic beverages, tobacco	0.4
Clothing and footwear	-0.1
Housing, water, electricity, gas and other fuels	0.4
Furnishings, household equipment and routine household	0.1
Health	0.1
Transport	-0.1
Communication	0.0
Recreation and culture	0.3
Education	0.1
Restaurants and hotels	0.3
Miscellaneous goods and services	0.2

In **'food and non-alcoholic beverages'**, prices of bread and cereals increased by 2.2%, of which prices of bread by 2.0%. Prices of cheese and curd were higher by 6.2%, UHT semi-skimmed milk by 6.8%, yoghurt by 5.6%. Prices of sugar fell by 19.0%. Prices of fruits increased by 5.3% and prices of vegetables fell by 2.2%, whereas prices of potatoes were lower by 20.8%. Prices of meat were higher by 4.3%, of which prices of smoked meat and sausages by 1.3%. Prices of pork decreased by 1.0%. Prices of eggs were higher by 29.3%. Prices of butter increased by 10.2% and prices of non-alcoholic beverages by 6.2%, of which prices of coffee by 22.5%.

The increase in prices in **'alcoholic beverages, tobacco'** was due to an increase in prices of tobacco products by 7.0%, spirits by 2.4%. Prices of beer fell by 0.2% and prices of wine decreased by 1.0%.

In **'housing, water, electricity, gas and other fuels'**, prices of actual rentals increased by 6.1%, water supply by 4.2%, sewage collection by 3.7%, solid fuels by 0.2% and heat energy by 3.3%. Owner-occupied housing (imputed rentals) increased by 4.4%.

Prices of electricity were lower by 4.5% and natural gas by 8.1%.

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The increase in prices in **'restaurants and hotels'** was mainly influenced by price rise of catering services, whose prices were higher by 4.6%. Prices of accommodation services increased by 7.4%.

In **'recreation and culture'**, prices of package holidays increased by 4.3% and recreational and cultural services by 5.8%.

'Miscellaneous goods and services' include various items, of which prices of goods and services for personal care increased by 0.1% and prices of insurance by 5.9%. Prices of financial services rose by 3.6% and prices of social services by 9.2%.

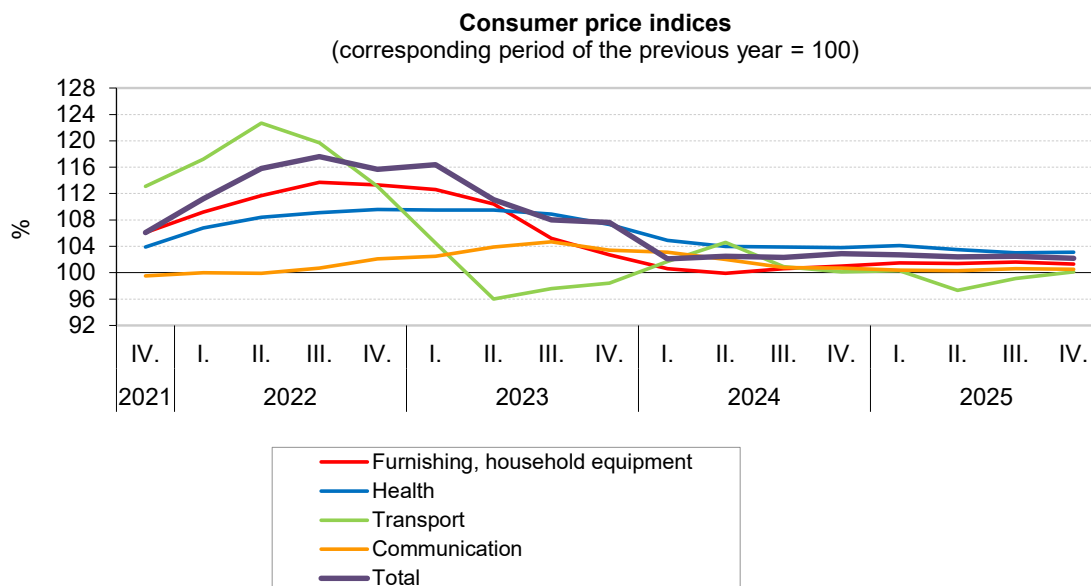
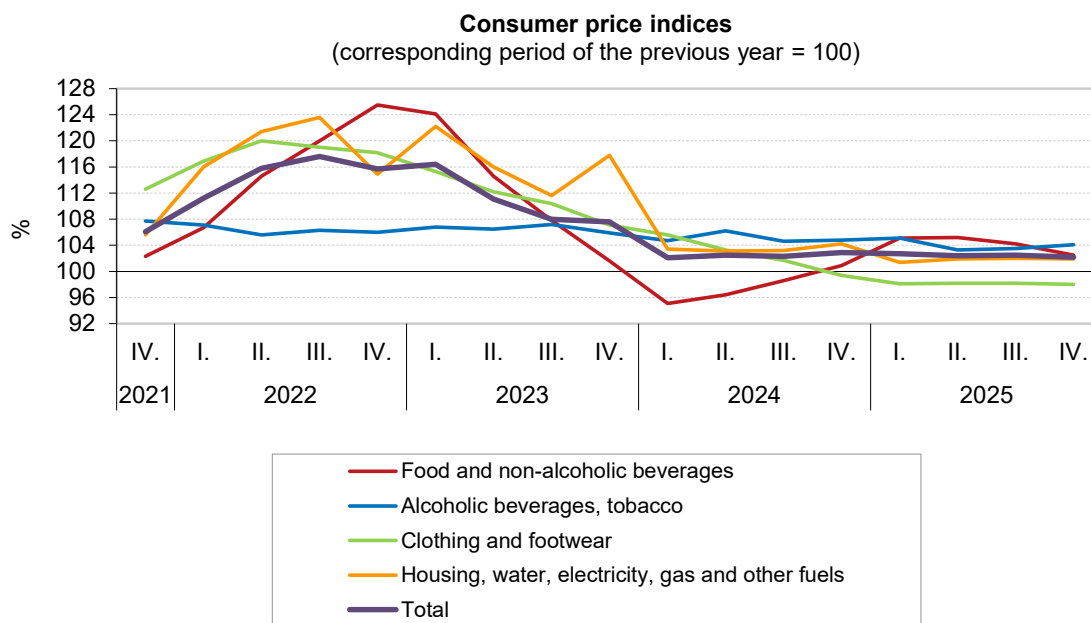
In **'clothing and footwear'**, prices of garments decreased by 1.5% and prices of shoes and other footwear by 4.2%.

In **'furnishings, household equipment and routine household maintenance'** prices of furniture and furnishings were higher by 2.7%. Prices of non-durable household goods fell by 2.3%.

In **'transport'**, prices of fuels and lubricants for personal transport equipment decreased by 6.8%. Prices of motor cars increased by 0.7% and prices of transport services by 3.2%.

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Development of the consumer price index broken down by ECOICOP divisions



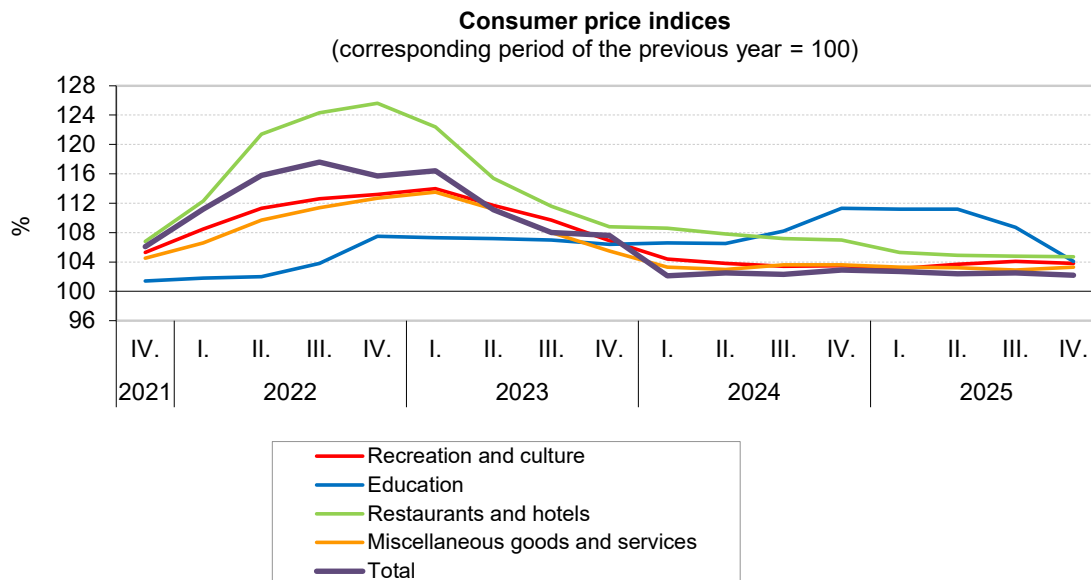
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ECOICOP	Division	Constant weights of 2022 v %	2024	2025							
			corresponding period of the previous year = 100								
			4.Q	1.Q	2.Q	3.Q	October	November	December	4.Q	year
E00	Total including	1000.0	102.9	102.7	102.4	102.5	102.5	102.1	102.1	102.2	102.5
E01	Food and non-alcoholic beverages of which :	177.4	100.9	105.1	105.2	104.2	103.6	102.2	101.7	102.5	104.2
E01.11	Breads and cereals	28.4	97.6	101.6	102.2	102.3	103.0	102.1	102.4	102.5	102.2
E01.12	Meat	40.6	98.1	103.1	103.6	105.1	106.3	105.3	104.3	105.3	104.3
E02	Alcoholic beverages, tobacco	84.6	104.8	105.1	103.3	103.5	104.3	104.0	104.1	104.1	104.0
E03	Clothing and footwear	44.0	99.4	98.1	98.2	98.2	98.3	97.9	97.9	98.0	98.1
E04	Housing, water, electricity, gas and other fuels of which :	258.4	104.2	101.4	101.9	102.0	101.9	101.7	101.9	101.9	101.8
E04.1	Actual rentals for housing	33.2	106.2	106.5	106.0	105.7	105.8	106.2	106.4	106.1	106.1
E04.2	Owner occupied housing costs (imputed rentals for housing)	103.4	101.6	103.2	104.5	104.9	104.8	104.8	105.0	104.8	104.4
E04.510	Electricity	44.3	109.2	95.2	95.3	96.2	96.4	95.0	94.9	95.4	95.5
E04.521	Natural gas and town gas	19.1	96.4	91.9	91.6	91.9	92.1	91.5	93.3	92.3	91.9
E05	Furnishing, household equipment and routine household maintenance	58.0	101.0	101.5	101.4	101.6	101.4	101.0	101.4	101.3	101.4
E06	Health	27.9	103.8	104.1	103.5	103.0	103.2	102.9	103.3	103.1	103.4
E07	Transport of which	105.6	100.1	100.3	97.3	99.1	100.2	100.4	99.8	100.1	99.2
E07.22	Fuels and lubricants for personal transport equipment	35.4	92.7	95.6	87.9	93.3	96.6	97.5	95.2	96.4	93.2
E08	Communication	29.4	100.7	100.4	100.3	100.6	100.5	100.5	100.4	100.5	100.4
E09	Recreation and culture of which	78.2	103.5	103.1	103.7	104.1	104.2	103.7	103.6	103.8	103.7
E09.60	Package holidays	18.7	105.5	103.0	105.2	105.1	105.4	103.3	102.8	103.8	104.3
E10	Education	6.2	111.3	111.2	111.2	108.7	104.1	104.1	104.1	104.1	108.7
E11	Restaurants and hotels	64.8	107.0	105.3	104.9	104.8	104.7	104.6	104.7	104.7	104.9
E12	Miscellaneous goods and services	65.5	103.6	103.3	103.2	102.9	103.1	103.2	103.5	103.3	103.2

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