

ANALYSIS

10 July 2025

Development of consumer price indices in the Q2 2025

In Q2 of 2025, consumer prices rose by 0.5% compared to the Q1 2025. In a year-on-year comparison, consumer prices rose by 2.4% in Q2 2025, which is 0.3 percentage points lower than in Q1 2025.

The quarter-on-quarter development of consumer prices in Q2 2025 was mainly influenced by price increases in 'food and non-alcoholic beverages', 'housing, water, electricity, gas and other fuels' and in 'restaurants and hotels'. To a lesser extent, prices also increased in most other divisions. The price decline occurred mainly in 'transport'. In 'food and non-alcoholic beverages' prices of bread and cereals increased by 1.2%, milk, cheese and eggs by 1.7%, meat by 1.6%, fruits by 2.7%. Prices of vegetables fell by 1.3%, with prices of potatoes being by 14.5% higher. Prices of oils and fats decreased by 3.7%. In 'housing, water, electricity, gas and other fuels' prices of actual rentals for housing increased by 1.1%, heat and hot water by 1.0%. Owner occupied housing costs (imputed rental) increased by 1.2%. On the contrary, prices of electricity decreased by 0.7%, natural gas by 2.8% and solid fuels by 0.4%. In 'restaurants and hotels' prices of catering services rose by 1.0% and prices of accommodation services by 4.9%. In 'transport' prices of fuels and lubricants for personal transport equipment decreased by 5.5%. Prices of motor cars were higher by 1.2% and transport services by 1.3%. The average month-on-month change in the overall consumer price index in Q2 2025 was 0.2%, in Q1 2025 it was 0.5%.

Consumer price indices (previous quarter = 100)

DIVISION	2024			2025	
	Q2	Q3	Q4	Q1	Q2
TOTAL	100.8	100.5	100.1	101.3	100.5
Food and non-alcoholic beverages	100.8	100.5	101.0	102.6	101.0
Alcoholic beverages, tobacco	101.9	100.3	99.9	102.9	100.1
Clothing and footwear	100.0	98.8	101.5	97.8	100.1
Housing, water, electricity, gas and other fuels	99.9	100.5	100.6	100.4	100.5
Furnishings, household equipment and routine household maintenance	100.8	99.8	100.5	100.5	100.7
Health	102.2	100.9	99.3	101.5	101.7
Transport	102.0	98.4	98.9	101.0	99.0
Communication	100.3	100.0	100.1	100.0	100.1
Recreation and culture	99.2	104.7	96.5	102.8	99.8
Education	100.1	103.5	106.9	100.3	100.1
Restaurants and hotels	101.9	101.2	100.9	101.1	101.5
Miscellaneous goods and services	101.0	100.5	100.1	101.5	101.0

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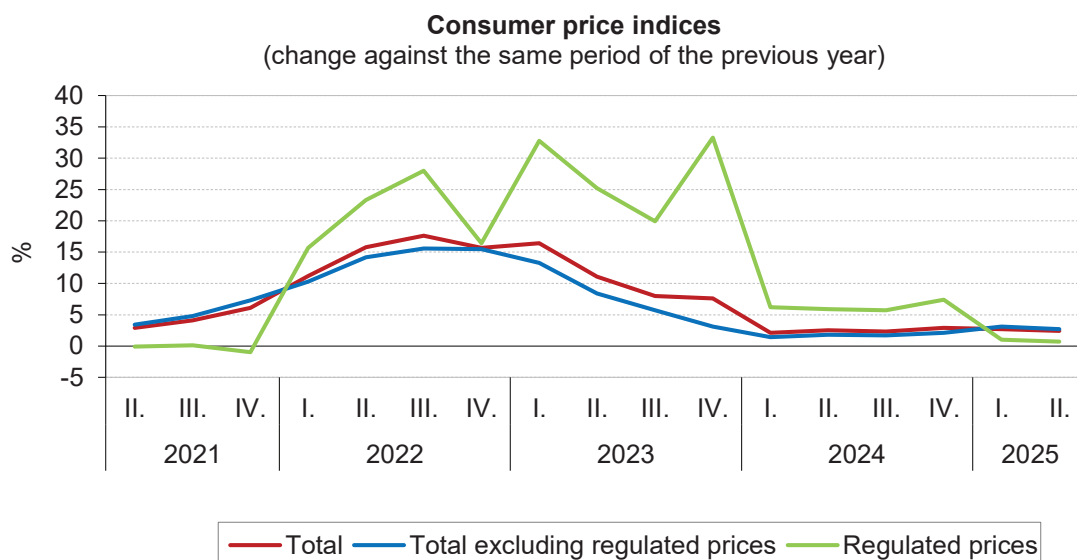
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Consumer prices rose by 2.4%, **year-on-year (y-o-y), in the Q2 2025 compared to the Q2 2024**, i.e. by 0.3 percentage points less than in the Q1 2025. The slowdown in price growth was mainly due to price developments in 'transport' and in 'alcoholic beverages, tobacco'. In the opposite direction, the acceleration of price growth in 'housing, water, electricity, gas and other fuels' was mainly the cause.

Changes in the development of prices in Q2 2025 were reflected in an acceleration in the year-on-year growth of market prices to 2.7% (3.1% growth in Q1 2025). Regulated prices increased by 0.7% (1.0% growth in Q1 2025).



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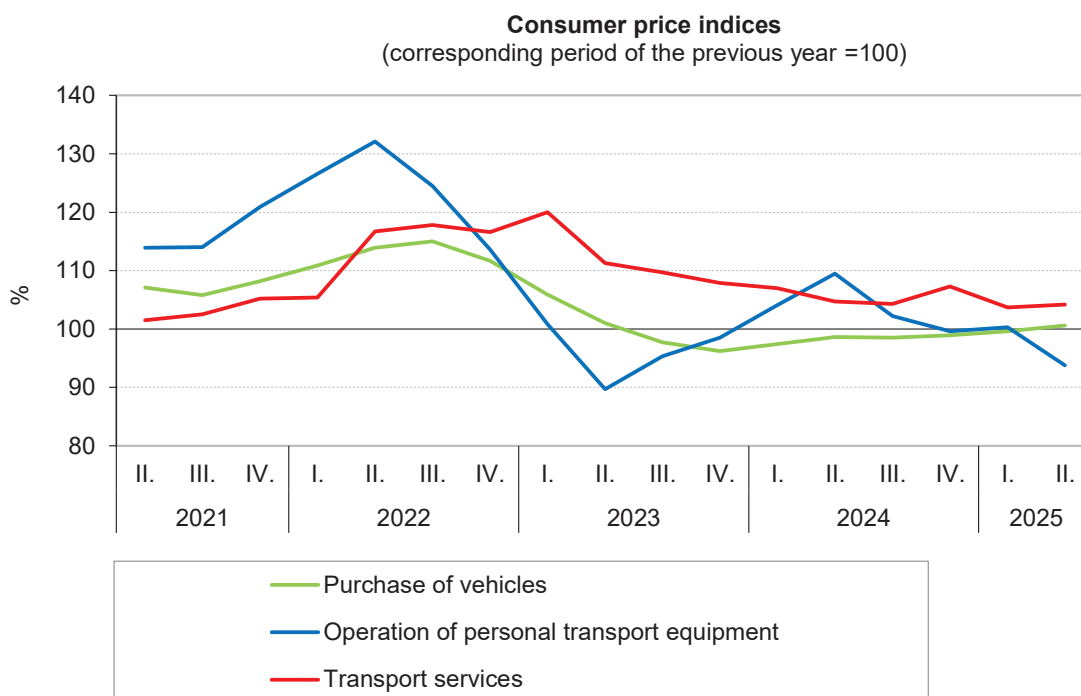
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In **'transport'**, prices of fuels and lubricants for personal transport equipment fell by 12.1% in Q2 2025. The average price of Natural 95 petrol was CZK 34.30 per litre and the price of diesel was CZK 33.04 per litre in June. Prices of motor cars were higher by 0.8%.



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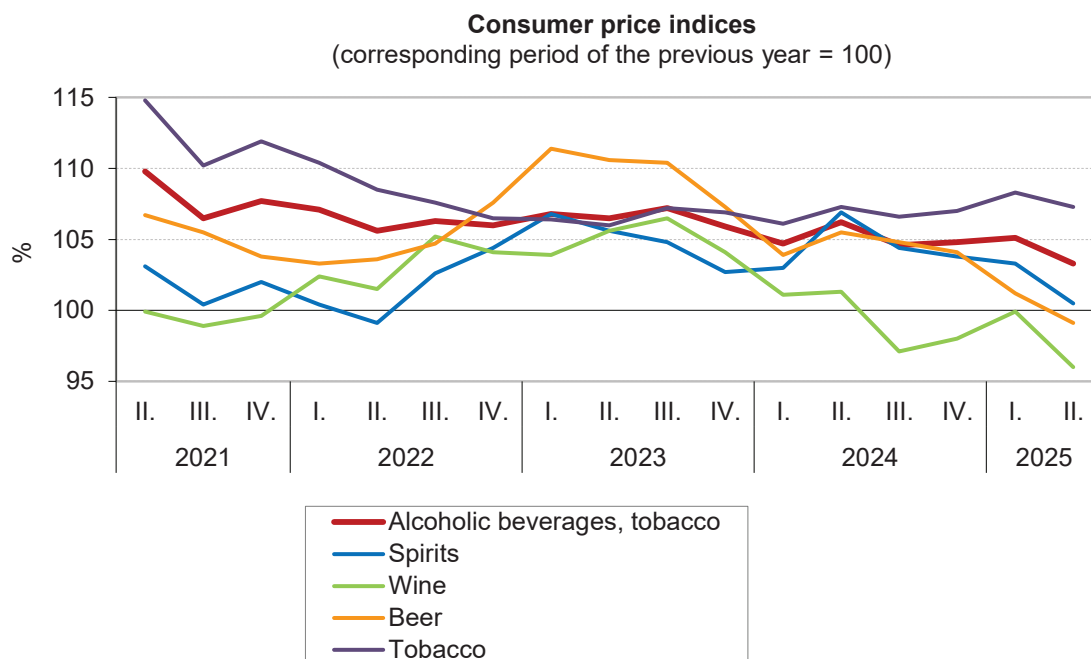
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In **'alcoholic beverages, tobacco'**, prices of tobacco products increased by 7.3%, and spirits by 0.5%. Prices of wine were lower by 4.0% and beer by 0.9%.



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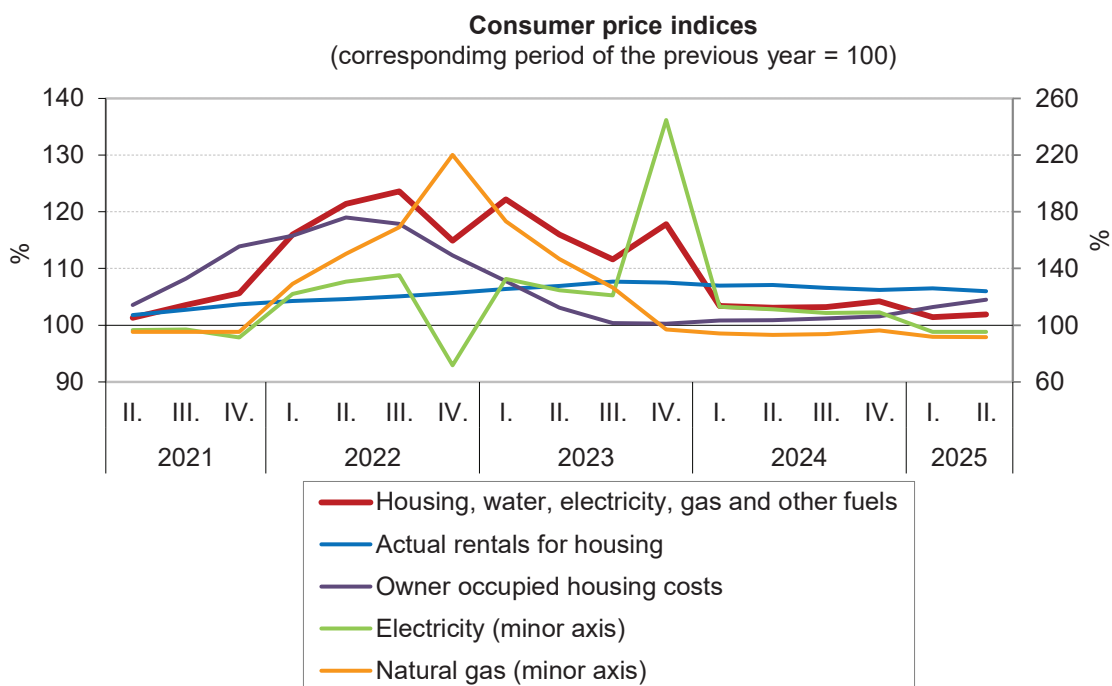
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In **'housing, water, electricity, gas and other fuels'**, prices of actual rentals for housing increased by 6.0, %, materials and services for the maintenance and repair of the dwelling by 3.4%, water supply by 4.2%, sewage collection by 3.7%, solid fuels by 1.8%, heat and hot water by 4.1%. The owner occupied housing costs (imputed rental) was higher by 4.5%. Prices of electricity went down by 4.7% and natural gas by 8.4%.



In **'restaurants and hotels'**, prices of catering services increased by 4.5% and prices of accommodation services by 7.9%.

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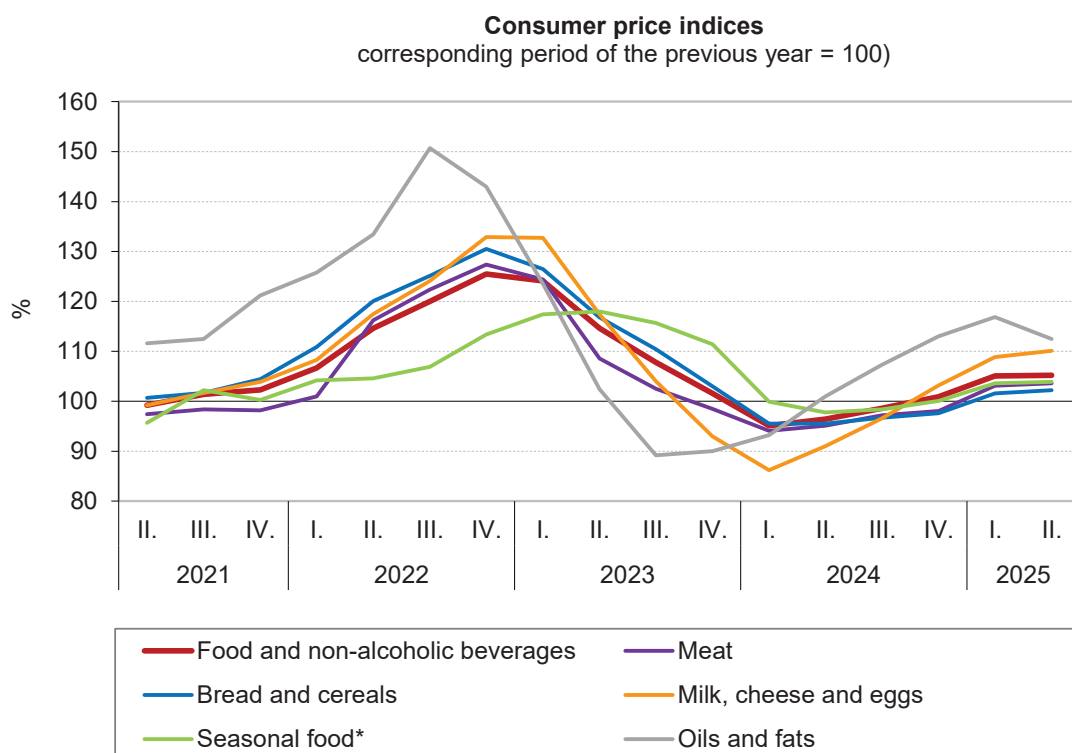
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In **'food and non-alcoholic beverages'**, prices of oils and fats increased by 12.5% year-on-year in Q2 2025, milk, cheese and eggs by 10.1%, fruits by 13.5%, bread and cereals by 2.2%, meat by 3.6%, coffee by 23.7%. Prices of vegetables fell by 2.6%, while prices of potatoes were lower by 17.7%. Prices of sugar fell by 26.4%.



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

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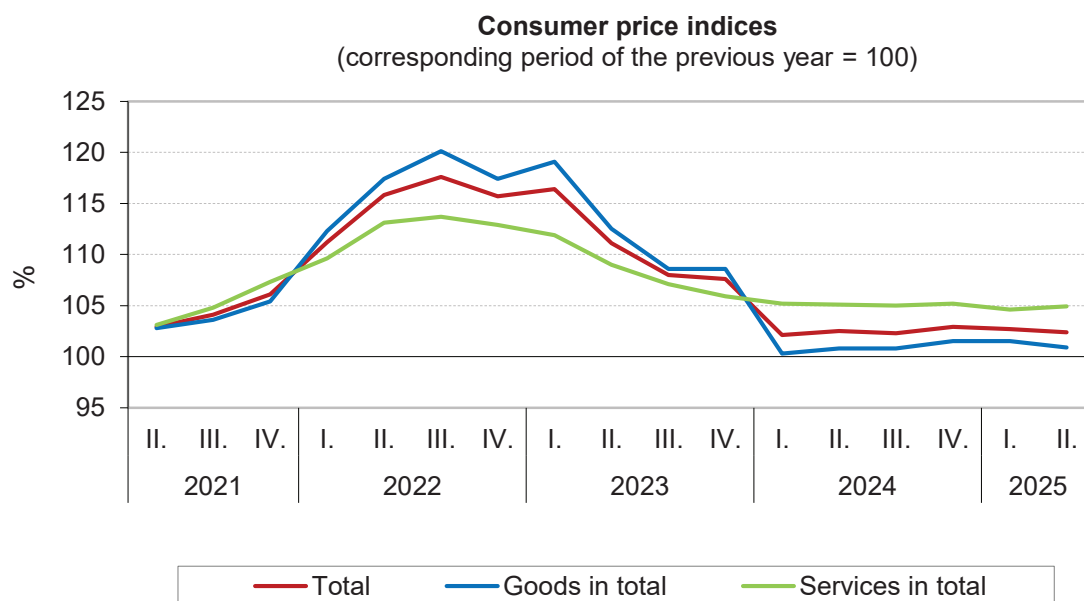
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In '**miscellaneous goods and services**', prices of goods and services for personal care were lower by 0.2%.

In '**recreation and culture**', prices of package holidays increased by 5.2% and recreational and cultural services by 5.8%.

In '**furnishings, household equipment and routine household maintenance**', prices of furniture and furnishings increased by 2.7%. Prices of non-durable household goods went down by 1.7%.

The aforementioned fluctuations in consumer prices resulted in a rise in prices of **goods in total** by 0.9% and prices of **services** by 4.9%.



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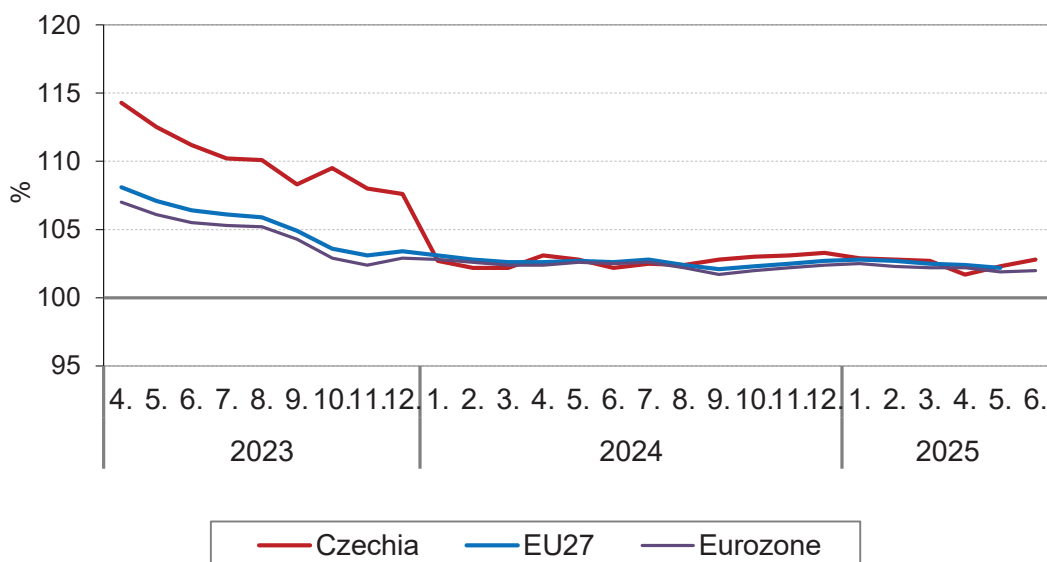
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Harmonized index of consumer prices (HICP) ¹⁾

According to preliminary calculations, the HICP in Czechia in **June** increased by 0.2% **month-on-month** and by 2.8% (2.3% in May), **year-on-year**. According to flash estimates of Eurostat, **the MUICP** (Monetary Union Index of Consumer Prices) in **June 2025** amounted to 2.0%, year-on-year (1.9% in May), 2.0% in Germany and 4.6% in Slovakia. It was the highest in Estonia in June (5.2%) and the lowest in Cyprus (0.5%). 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 2.2% in May (0.2 percentage points down on April). In May, the rise in prices was the highest in Romania (5.4%) and the lowest in Cyprus (0.4%).

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



¹⁾ Imputed rentals are excluded from the HICP.

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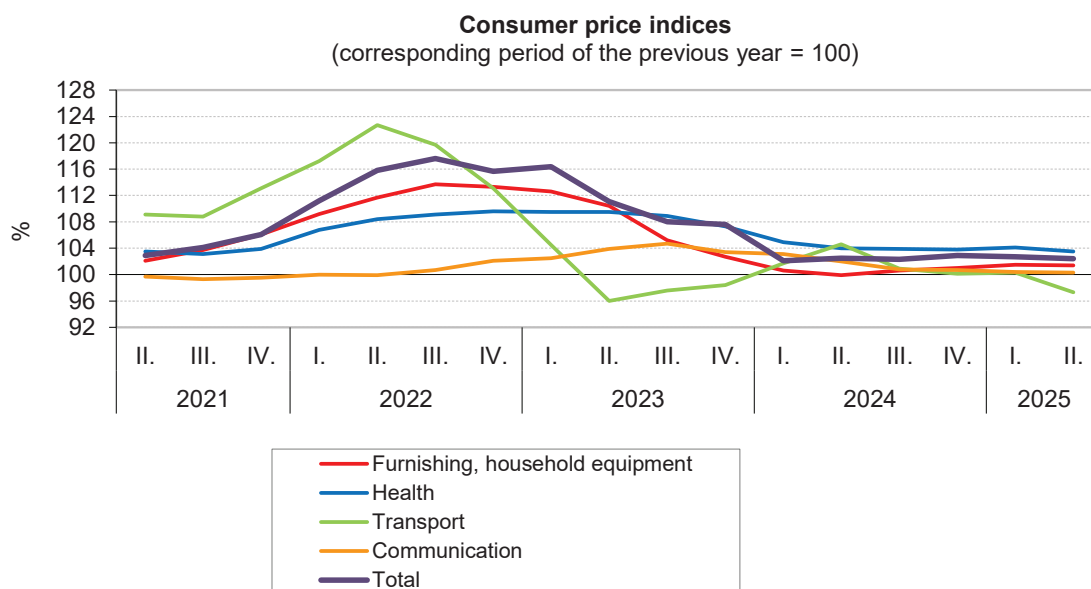
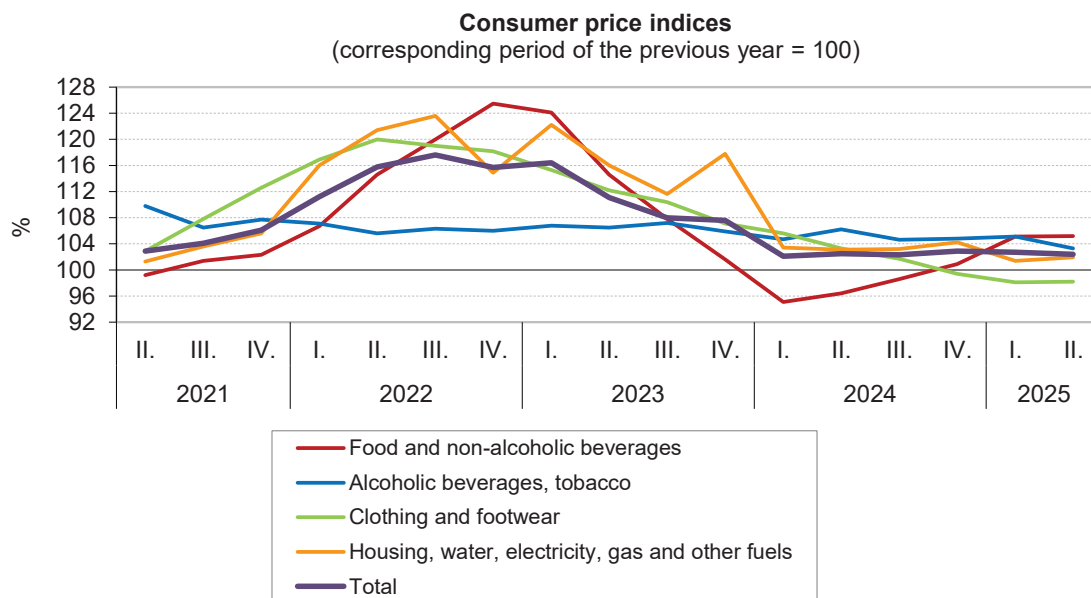
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Development of the consumer price index broken down by ECOICOP divisions



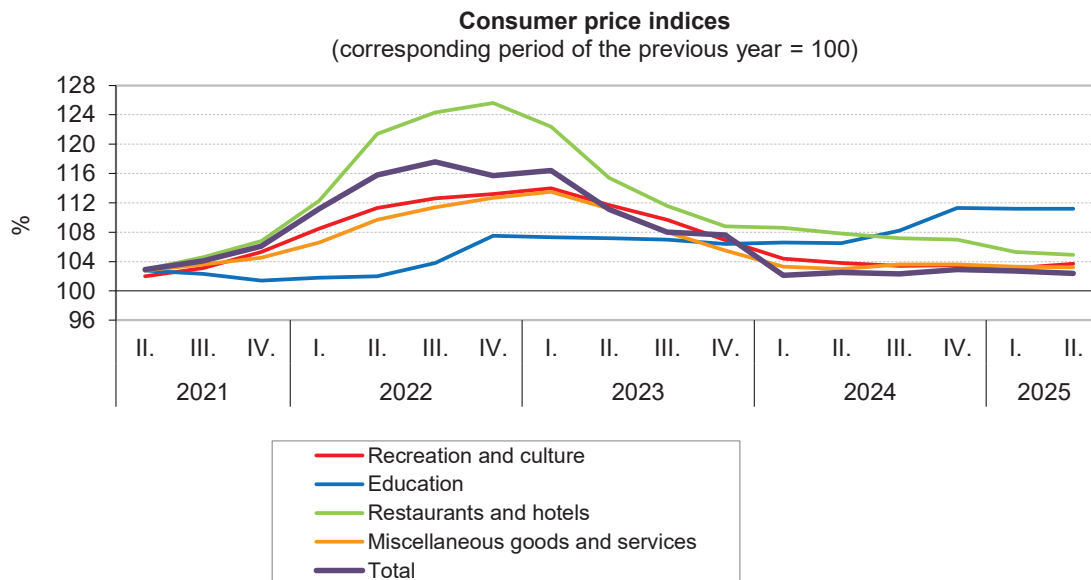
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ECOICOP	Division	Constant weights of 2022 v %	2024			2025				
			corresponding period of the previous year = 100							
			2.Q	3.Q	4.Q	1.Q	April	May	June	2.Q
E00	Total	1000.0	102.5	102.3	102.9	102.7	101.8	102.4	102.9	102.4
	including									
E01	Food and non-alcoholic beverages	177.4	96.4	98.6	100.9	105.1	104.1	105.4	106.2	105.2
	of which :									
E01.11	Breads and cereals	28.4	95.5	96.7	97.6	101.6	101.5	102.2	103.0	102.2
E01.12	Meat	40.6	95.1	97.2	98.1	103.1	101.4	103.6	105.9	103.6
E02	Alcoholic beverages, tobacco	84.6	106.2	104.6	104.8	105.1	102.0	103.7	104.1	103.3
E03	Clothing and footwear	44.0	103.3	101.7	99.4	98.1	98.0	98.1	98.5	98.2
E04	Housing, water, electricity, gas and other fuels	258.4	103.1	103.2	104.2	101.4	101.7	101.9	102.0	101.9
	of which :									
E04.1	Actual rentals for housing	33.2	107.1	106.6	106.2	106.5	105.9	105.7	106.3	106.0
E04.2	Owner occupied housing costs (imputed rentals for housing)	103.4	100.9	101.2	101.6	103.2	104.1	104.6	104.9	104.5
E04.510	Electricity	44.3	111.2	108.6	109.2	95.2	95.3	95.4	95.2	95.3
E04.521	Natural gas and town gas	19.1	93.2	93.9	96.4	91.9	91.1	91.6	92.2	91.6
E05	Furnishing, household equipment and routine household maintenance	58.0	99.9	100.6	101.0	101.5	100.8	101.4	102.0	101.4
E06	Health	27.9	104.0	103.9	103.8	104.1	103.1	103.7	103.7	103.5
E07	Transport	105.6	104.6	100.9	100.1	100.3	96.8	96.7	98.5	97.3
	of which									
E07.22	Fuels and lubricants for personal transport equipment	35.4	108.4	96.5	92.7	95.6	86.6	86.5	90.8	87.9
E08	Communication	29.4	102.0	100.8	100.7	100.4	100.4	100.2	100.2	100.3
E09	Recreation and culture	78.2	103.8	103.4	103.5	103.1	103.0	103.9	104.2	103.7
	of which									
E09.60	Package holidays	18.7	105.1	102.8	105.5	103.0	104.0	104.6	106.9	105.2
E10	Education	6.2	106.5	108.2	111.3	111.2	111.1	111.1	111.3	111.2
E11	Restaurants and hotels	64.8	107.8	107.2	107.0	105.3	105.0	105.0	104.8	104.9
E12	Miscellaneous goods and services	65.5	103.0	103.6	103.6	103.3	103.0	103.2	103.4	103.2

Elaborated by Consumer Prices Statistics Unit of the CZSO

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