

## ANALYSIS

10 April 2025

### Development of consumer price indices in the Q1 2025

**In Q1 of 2025, consumer prices rose by 1.3% compared to the Q4 2024. In a year-on-year comparison, consumer prices rose by 2.7% in Q1 2025, which is 0.2 percentage points lower than in Q4 2024.**

The quarter-on-quarter development of consumer prices in Q1 2025 was mainly influenced by price increases in 'food and non-alcoholic beverages', 'alcoholic beverages and tobacco' and in 'recreation and culture'. To a lesser extent, prices also increased in most other divisions. The drop in prices occurred in 'clothing and footwear'. In 'food and non-alcoholic beverages', prices of oils and fats increased by 0.2%, bread and cereals by 0.6%, milk, cheese and eggs by 3.8%, meat by 1.1%, fruits by 4.5%. Prices of vegetables rose by 7.2%, of which prices of potatoes by 12.7%. In 'alcoholic beverages, tobacco', prices of spirits were higher by 5.9%, wine by 4.0%, beer by 2.0% and tobacco products by 2.1%. In 'recreation and culture', prices of package holidays increased by 6.9%. In 'transport', prices of fuels and lubricants for personal transport equipment increased by 1.6%. Prices of motor cars were higher by 0.4%. In 'housing, water, electricity, gas and other fuels', prices of actual rentals for housing rose by 2.0%, water supply by 4.2%, sewage collection by 3.7%. Owner occupied housing costs (imputed rental) increased by 0.4%. On the contrary, prices of electricity decreased by 1.4%, natural gas by 1.5%, solid fuels by 0.4% and heat and hot water by 0.1%. In 'clothing and footwear', prices of garments fell by 2.1% and prices of shoes and other footwear by 3.3%. The average month-on-month change in the overall consumer price index in Q1 2025 was 0.5%, in Q4 2024 it was 0.0%.

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

DIVISION	2024				2025
	Q1	Q2	Q3	Q4	Q1
TOTAL	101.4	100.8	100.5	100.1	101.3
Food and non-alcoholic beverages	98.6	100.8	100.5	101.0	102.6
Alcoholic beverages, tobacco	102.6	101.9	100.3	99.9	102.9
Clothing and footwear	99.1	100.0	98.8	101.5	97.8
Housing, water, electricity, gas and other fuels	103.2	99.9	100.5	100.6	100.4
Furnishings, household equipment and routine household maintenance	100.0	100.8	99.8	100.5	100.5
Health	101.3	102.2	100.9	99.3	101.5
Transport	100.8	102.0	98.4	98.9	101.0
Communication	100.3	100.3	100.0	100.1	100.0
Recreation and culture	103.3	99.2	104.7	96.5	102.8
Education	100.5	100.1	103.5	106.9	100.3
Restaurants and hotels	102.8	101.9	101.2	100.9	101.1
Miscellaneous goods and services	101.8	101.0	100.5	100.1	101.5

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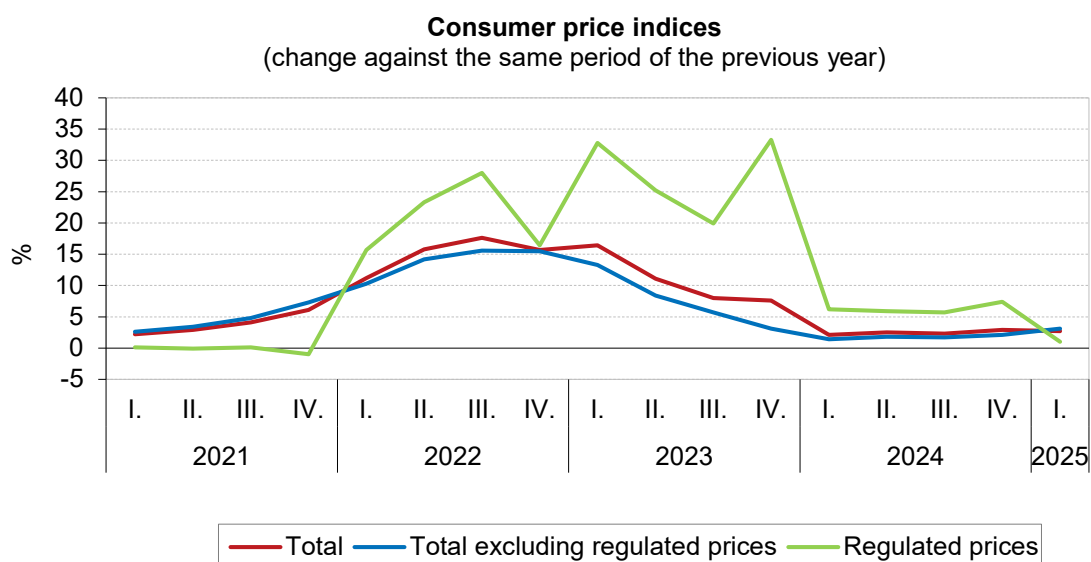
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Consumer prices rose by 2.7%, **year-on-year (y-o-y), in the Q1 2025 compared to the Q1 2024**, i.e. by 0.2 percentage points less than in the Q4 2024. The slowdown in price growth was mainly due to price developments in 'housing, water, electricity, gas and other fuels' and in 'restaurants and hotels'. In the opposite direction, the acceleration of price growth in 'food and non-alcoholic beverages' was mainly the cause.

Changes in the development of prices in Q1 2025 were reflected in an acceleration in the year-on-year growth of market prices to 3.1% (2.1% growth in Q4 2024). Regulated prices increased by 1.0% (7.4% growth in Q4 2024).



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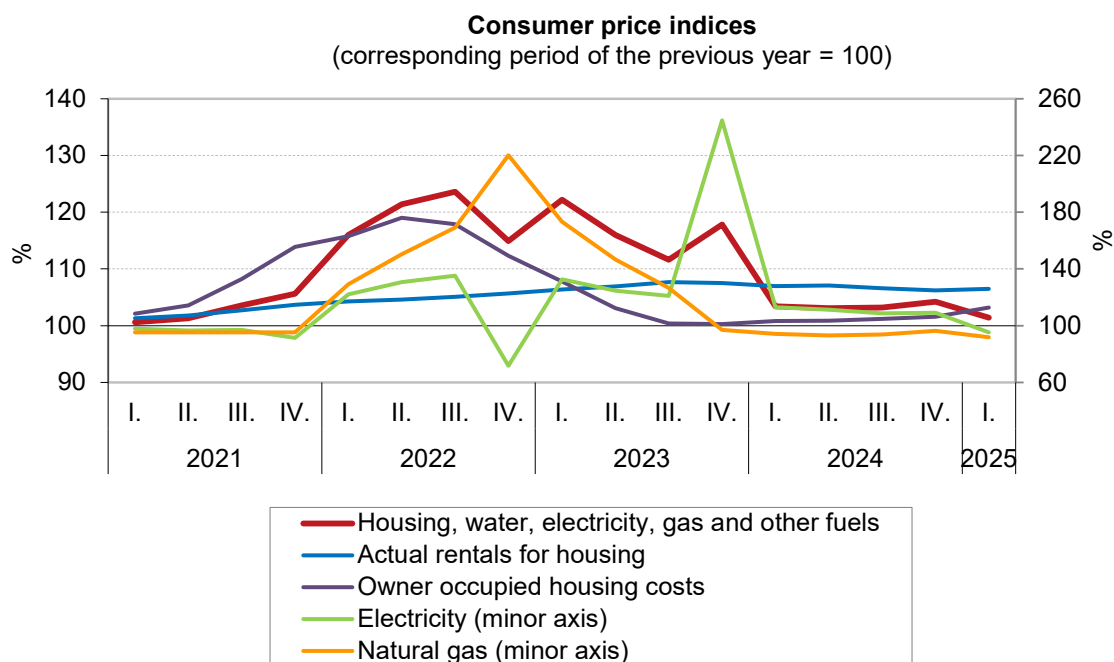
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In **'housing, water, electricity, gas and other fuels'**, prices of actual rentals for housing increased by 6.5, %, services for the maintenance and repair of the dwelling by 3.5%, water supply by 4.2%, sewage collection by 3.7%, solid fuels by 1.2%, heat and hot water by 4.4%. The owner occupied housing costs (imputed rental) was higher by 3.2%. Prices of electricity went down by 4.8% and natural gas by 8.1%.



In **'restaurants and hotels'**, prices of catering services increased by 4.9% and prices of accommodation services by 8.5%.

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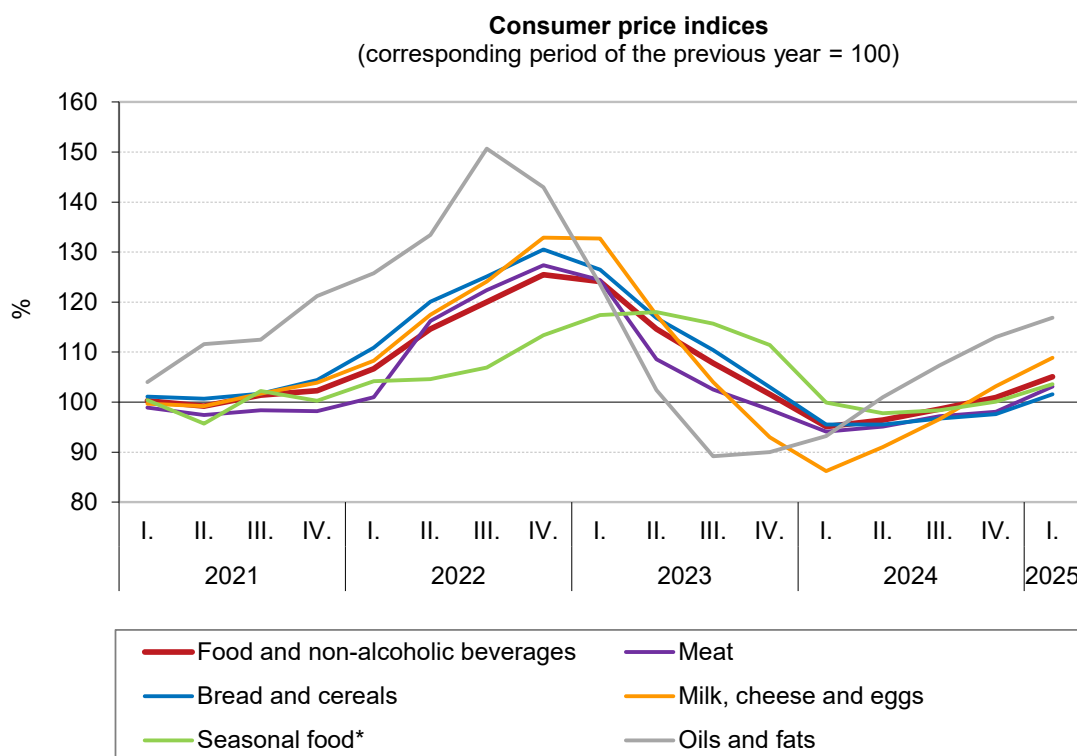
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In **'food and non-alcoholic beverages'**, prices of oils and fats increased by 16.9% year-on-year in Q1 2025, milk, cheese and eggs by 8.9%, fruit by 7.9%, bread and cereals by 1.6%, meat by 3.1%, coffee by 18.0%. Prices of vegetables increased by 1.0%, while prices of potatoes were lower by 18.6%. Prices of sugar fell by 22.3%.



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

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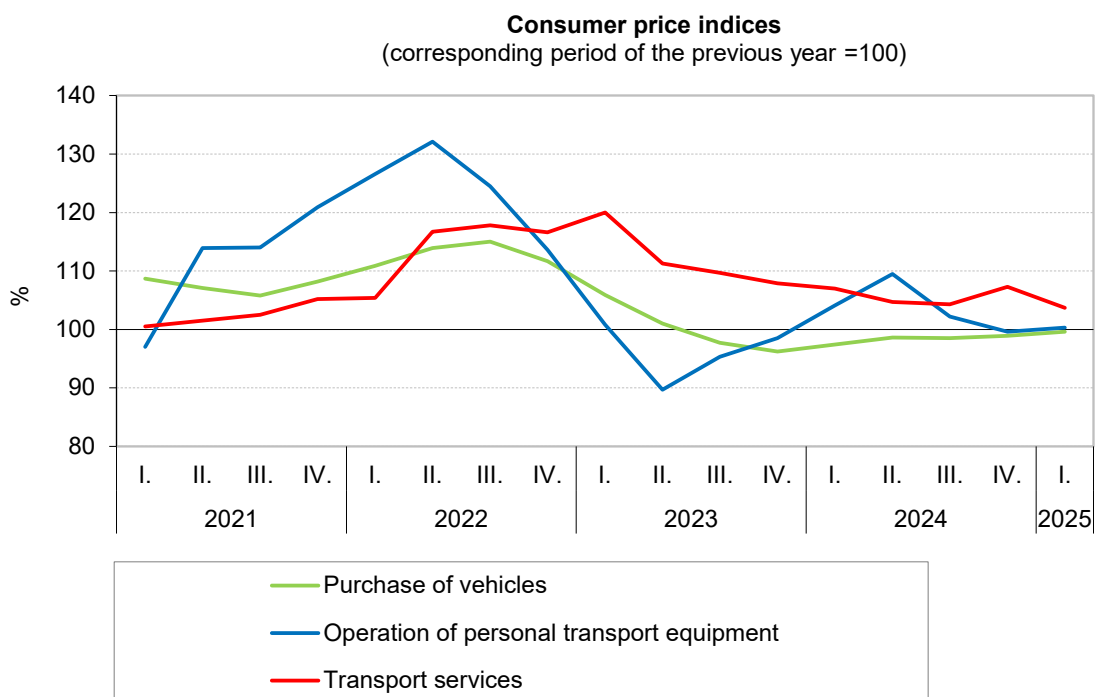
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In **'clothing and footwear'**, prices of garments decreased by 1.3% and prices of shoes and other footwear by 4.9%.

In **'transport'**, prices of fuels and lubricants for personal transport equipment fell by 4.4% in Q1 2025. The average price of Natural 95 petrol was CZK 35.25 per litre and the price of diesel was CZK 34.83 per litre in March. Prices of motor cars fell by 0.2%.



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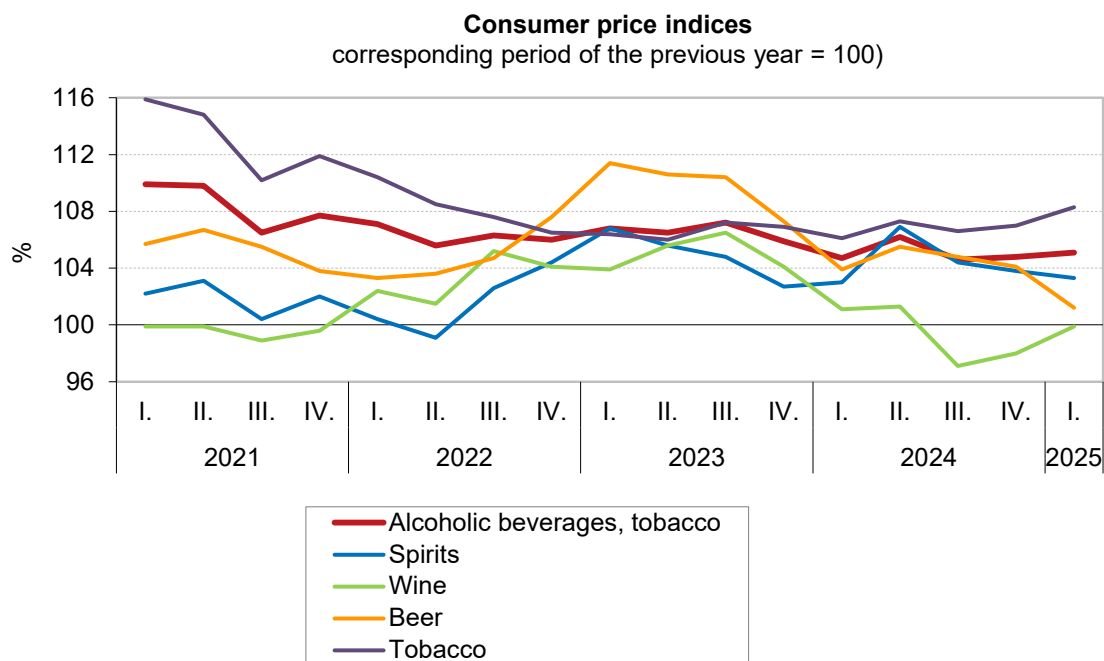
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In **'alcoholic beverages, tobacco'**, prices of tobacco products increased by 8.3%, beer by 1.2%, spirits by 3.3%. Prices of wine were lower by 0.1%.



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

In **'recreation and culture'**, prices of package holidays increased by 3.0% and recreational and recreational and cultural services by 4.7%.

In **'furnishings, household equipment and routine household maintenance'**, prices of furniture and furnishings increased by 2.8%. Prices of non-durable household goods went down by 1.2%.

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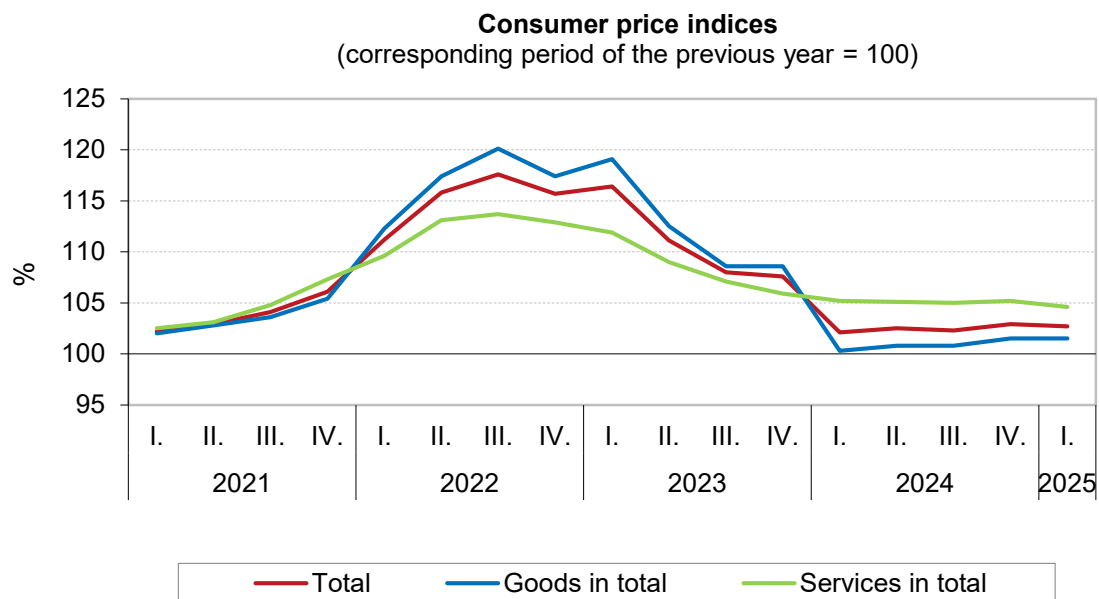
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The aforementioned fluctuations in consumer prices resulted in a rise in prices of **goods in total** by 1.5% and prices of **services** by 4.6%.



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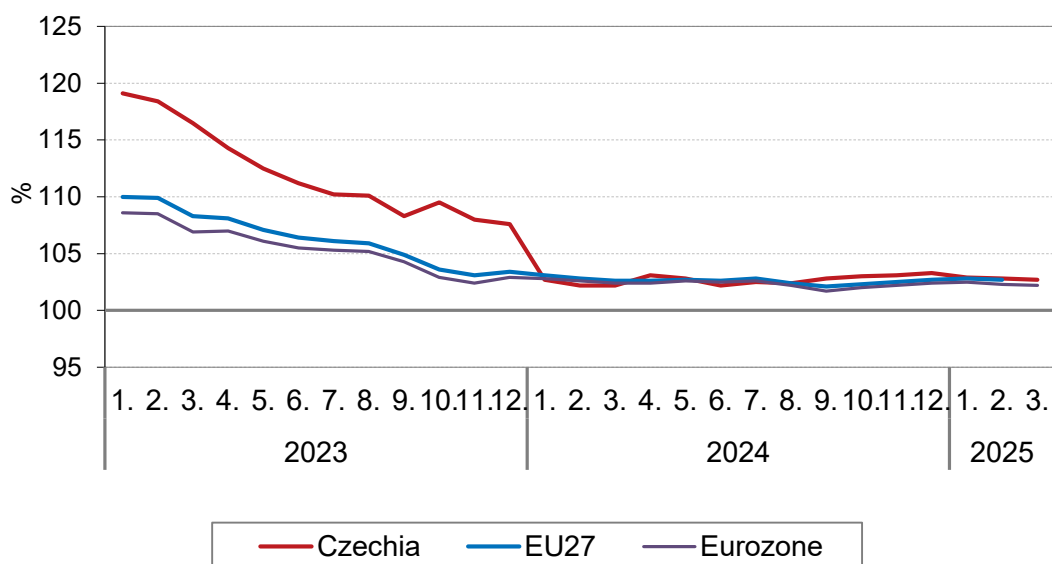
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### Harmonized index of consumer prices (HICP) <sup>1)</sup>

According to preliminary calculations, the HICP in Czechia in **March** increased by 0.1% **month-on-month** and 2.7% (2.8% in February), **year-on-year**. According to flash estimates of Eurostat, **the MUICP** (Monetary Union Index of Consumer Prices) in **March 2025** amounted to 2.2% year-on-year (2.3% in February), 2.3% in Germany. It was the highest in Estonia, Croatia and Slovakia in March (identically 4.3%) and the lowest in France (0.9%). 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 2.7% in February, which was 0.1 percentage points down on January. In February, the rise in prices was the highest in Hungary (5.7%) and the lowest in France (0.9%).

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



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

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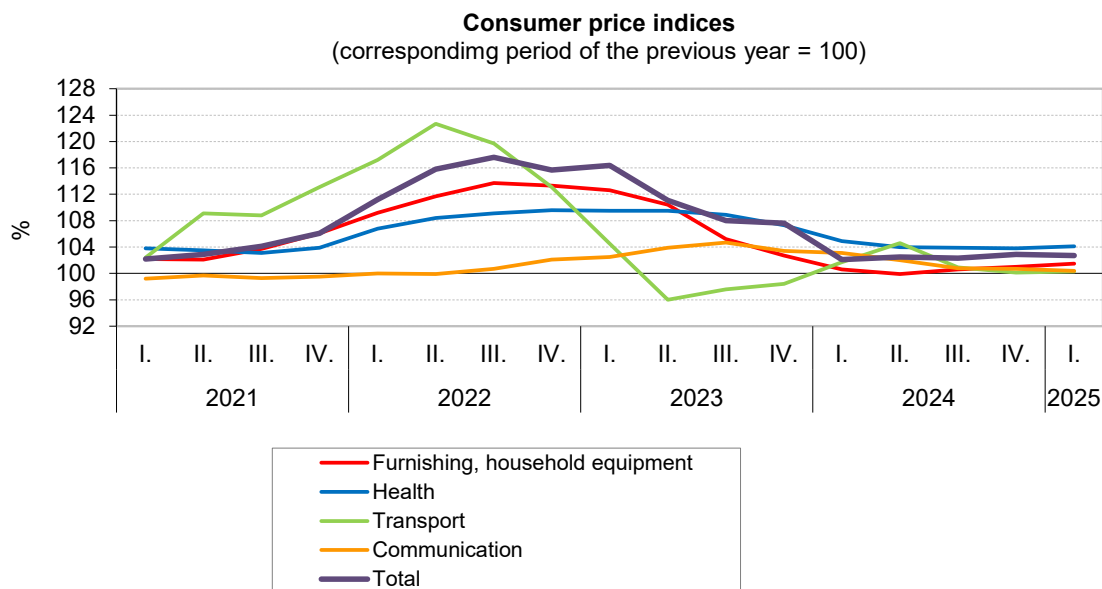
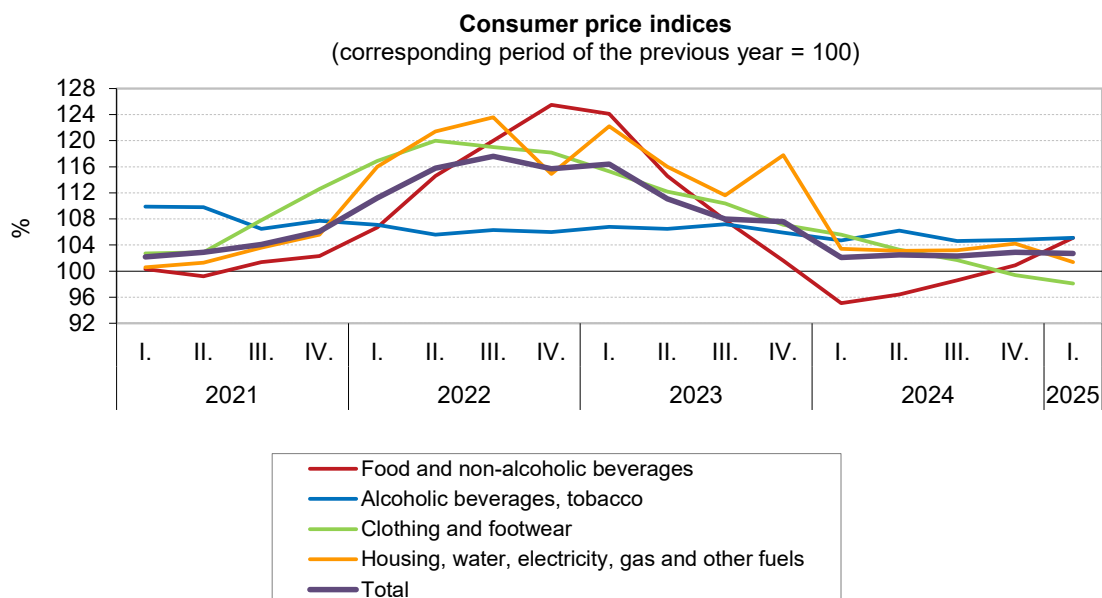
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### Development of the consumer price index broken down by ECOICOP divisions



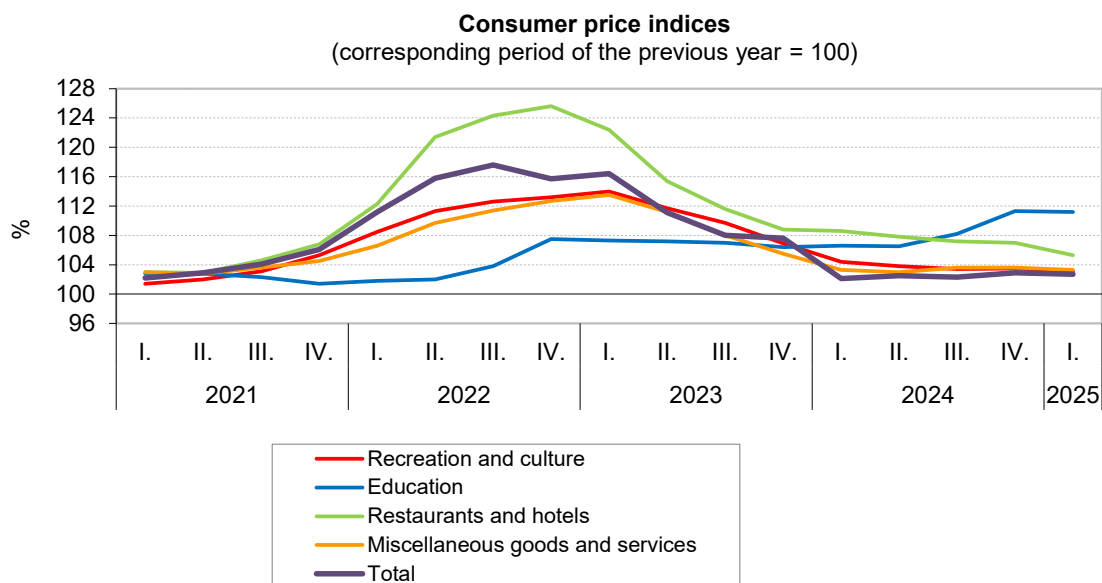
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Division	Constant weights of 2022 v %	2024				2025			
		corresponding period of the previous year = 100							
		1.Q	2.Q	3.Q	4.Q	January	February	March	1.Q
Total	1000.0	102.1	102.5	102.3	102.9	102.8	102.7	102.7	102.7
including									
Food and non-alcoholic beverages	177.4	95.1	96.4	98.6	100.9	104.8	104.4	106.1	105.1
of which :									
Breads and cereals	28.4	95.5	95.5	96.7	97.6	101.4	101.5	102.1	101.6
Meat	40.6	94.1	95.1	97.2	98.1	103.5	102.1	103.7	103.1
Alcoholic beverages, tobacco	84.6	104.7	106.2	104.6	104.8	104.8	105.3	105.2	105.1
Clothing and footwear	44.0	105.6	103.3	101.7	99.4	98.3	98.1	97.8	98.1
Housing, water, electricity, gas and other fuels	258.4	103.4	103.1	103.2	104.2	101.3	101.3	101.5	101.4
of which :									
Actual rentals for housing	33.2	107.0	107.1	106.6	106.2	106.6	106.7	106.3	106.5
Owner occupied housing costs (imputed rentals for housing)	103.4	100.8	100.9	101.2	101.6	102.9	103.1	103.6	103.2
Electricity	44.3	113.1	111.2	108.6	109.2	95.3	95.2	95.2	95.2
Natural gas and town gas	19.1	94.3	93.2	93.9	96.4	92.3	92.1	91.5	91.9
Furnishing, household equipment and routine household maintenance	58.0	100.6	99.9	100.6	101.0	101.4	101.7	101.4	101.5
Health	27.9	104.9	104.0	103.9	103.8	104.1	104.5	103.5	104.1
Transport	105.6	101.7	104.6	100.9	100.1	102.1	100.7	98.1	100.3
of which									
Fuels and lubricants for personal transport equipment	35.4	101.4	108.4	96.5	92.7	99.6	96.1	91.5	95.6
Communication	29.4	103.1	102.0	100.8	100.7	100.3	100.6	100.3	100.4
Recreation and culture	78.2	104.4	103.8	103.4	103.5	103.3	102.9	103.1	103.1
of which									
Package holidays	18.7	104.2	105.1	102.8	105.5	103.6	102.7	102.7	103.0
Education	6.2	106.6	106.5	108.2	111.3	111.1	111.2	111.2	111.2
Restaurants and hotels	64.8	108.6	107.8	107.2	107.0	105.6	105.3	105.1	105.3
Miscellaneous goods and services	65.5	103.3	103.0	103.6	103.6	103.3	103.3	103.2	103.3

Elaborated by Consumer Prices Statistics Unit of the CZSO

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