

ANALYSIS

14 April 2026

Development of consumer price indices in the Q1 2026

In Q1 2026, consumer prices rose by 0,7% compared to the Q4 2025. In a year-on-year comparison, consumer prices rose by 1,6% in Q1 2026, which is 0.6 percentage points lower than in Q4 2025.

The quarter-on-quarter development of consumer prices in Q1 2026 was mainly influenced by price increases in 'alcoholic beverages, tobacco' and a transition from decline to growth in 'transport' and in 'recreation, sport and culture'. The opposite effect was mainly due to the slowdown in prices in 'housing, water, electricity, gas and other fuels'. In 'alcoholic beverages, tobacco', prices of spirits and liquors increased by 5.6%, wine by 3.0% and beer by 3.7%. Prices of tobacco products were higher by 1.7%. In 'transport', prices of fuels and lubricants for personal transport equipment increased by 3.9% and prices of passenger transport services by 1.1%. In 'recreation, sport and culture', prices of package holidays increased by 5.6%, recreational services by 1.8% and cultural services by 2.0%. In 'housing, water, electricity, gas and other fuels', prices of electricity were lower by 9.0% and natural gas by 0.2%. On the contrary, there was an increase in prices of actual rentals, which were higher by 2.0%, water supply by 3.9% and sewage collection by 3.8%. Prices of solid fuels increased by 0.7% and heat and hot water by 0.3%. Owner occupied housing costs (imputed rentals) increased by 0.7%. In 'food and non-alcoholic beverages', prices of oils and fats decreased by 8.3%. Prices of meat were lower by 1.6% and prices in group 'milk, dairy products and eggs' decreased by 1.7%. Prices of fruits increased by 4.3% and prices of vegetables by 9.7%, of which prices of potatoes were higher by 24.8%. The average month-on-month change in the overall consumer price index in Q1 2026 was 0.5%, in Q4 2025 it was 0.0%.

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Consumer price indices (previous quarter = 100)

DIVISION	2025				2026
	Q1	Q2	Q3	Q4	Q1
TOTAL	101.3	100.4	100.7	99.8	100.7
Food and non-alcoholic beverages	102.7	101.0	99.5	99.3	100.4
Alcoholic beverages, tobacco	102.9	100.1	100.5	100.6	102.8
Clothing and footwear	97.9	100.1	98.8	101.3	97.3
Housing, water, electricity, gas and other fuels	100.4	100.4	100.6	100.4	99.5
Furnishings, household equipment and routine household maintenance	100.5	100.7	100.0	100.0	100.6
Health	101.6	101.6	100.5	99.4	102.5
Transport	101.1	99.0	100.2	99.9	101.7
Information and communication	100.5	100.6	100.8	100.2	100.6
Recreation, sport and culture	103.3	99.3	106.2	94.9	102.1
Education services	100.3	100.1	101.2	102.4	100.2
Restaurants and accommodation services	101.1	101.5	101.1	100.8	101.1
Insurance and financial services	102.0	101.6	100.5	101.0	102.0
Personal care, social protection and miscellaneous goods and services	101.3	100.8	100.1	100.3	102.4

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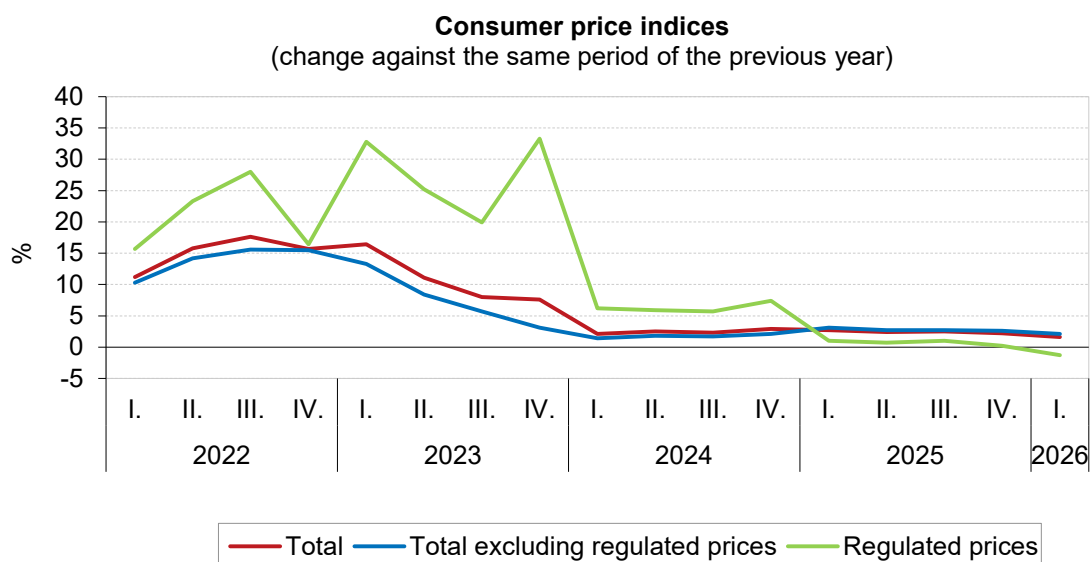
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Consumer prices rose by 1.6%, **year-on-year (y-o-y), in the Q1 2026 compared to the Q1 2025**, i.e. by 0.6 percentage points less than in the Q4 2025. The slowdown in price growth was mainly due to price developments in 'food and non-alcoholic beverages' and in 'housing, water, electricity, gas and other fuels'.

Changes in the development of prices in Q1 2026 were reflected in an acceleration in the year-on-year growth of market prices to 2.1% (2.6% growth in Q4 2025). Regulated prices decreased by 1.3% (0.2% growth in Q4 2025).



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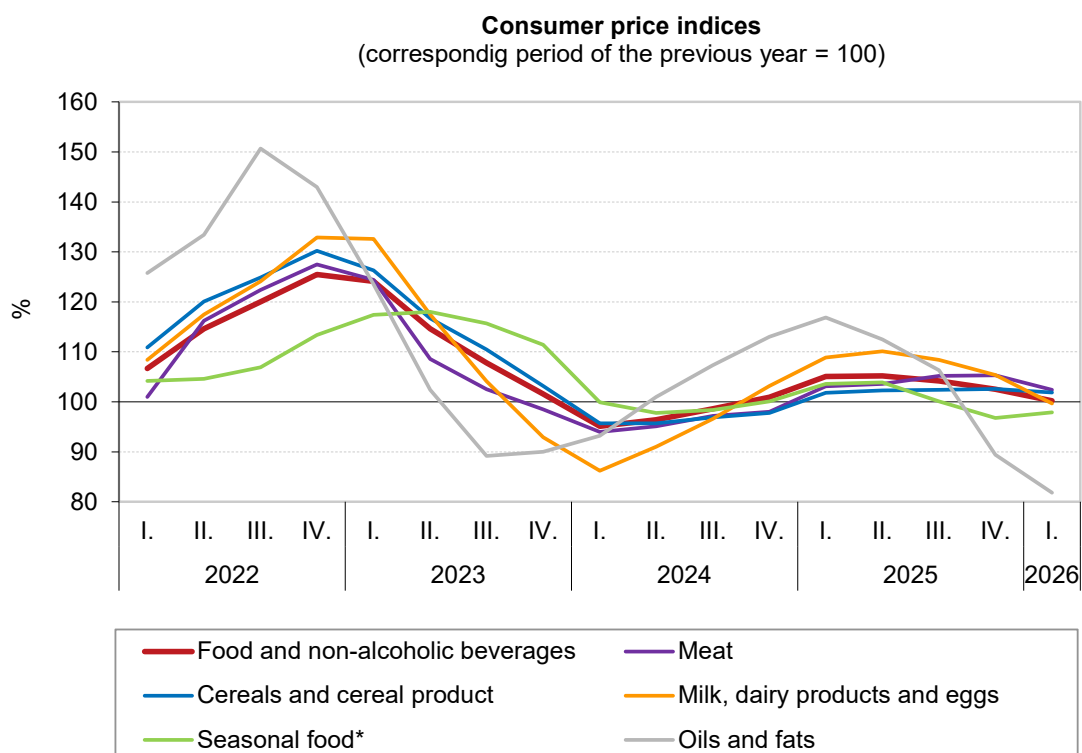
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In 'food and non-alcoholic beverages', prices of oils and fats decreased by 18.2% year-on-year in Q1 2026, fruits by 5.3%, vegetables by 0.9%, of which prices of potatoes by 19.4%. Prices of cereals and cereal products increased by 1.9%, meat by 2.4%, coffee by 13.3%. Prices in group 'milk, other dairy products and eggs' were lower by 0.3%.



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

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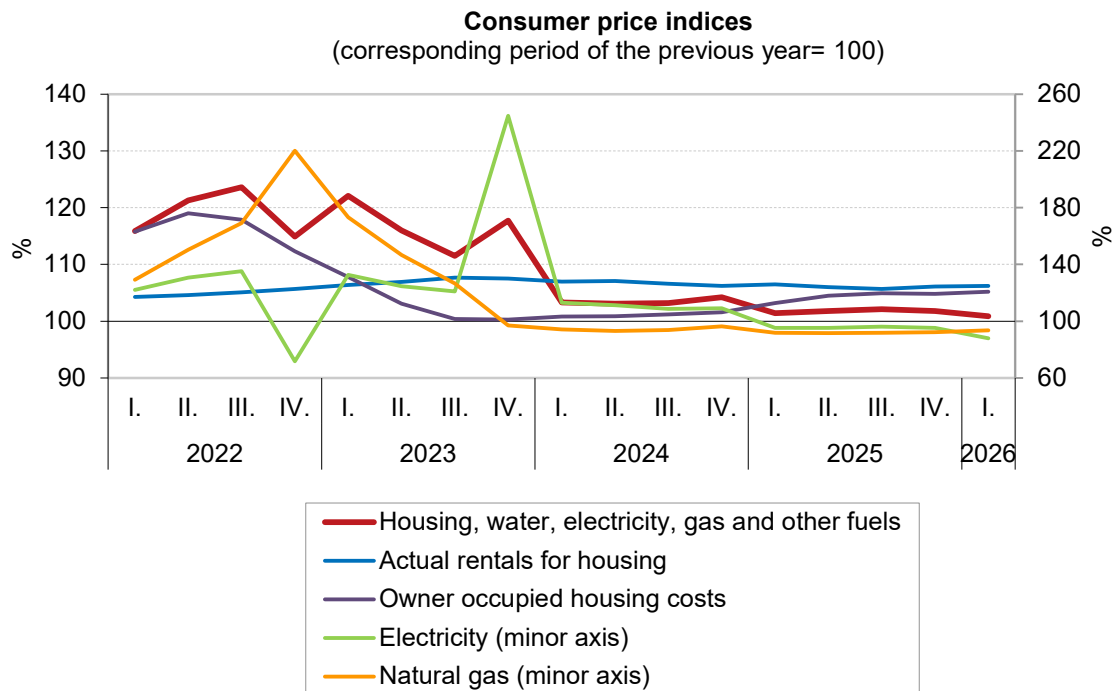
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In 'housing, water, electricity, gas and other fuels', prices of actual rentals for housing increased by 6.2%, prices of materials and services for the maintenance and repair of the dwelling by 3.5%, water supply by 3.9%, sewage collection by 3.8%, heat and hot water 2.1%. Owner occupied housing costs (imputed rentals) were higher by 5.2%. Prices of electricity went down by 12.0%, natural gas by 6.5% and solid fuels by 1.5%.



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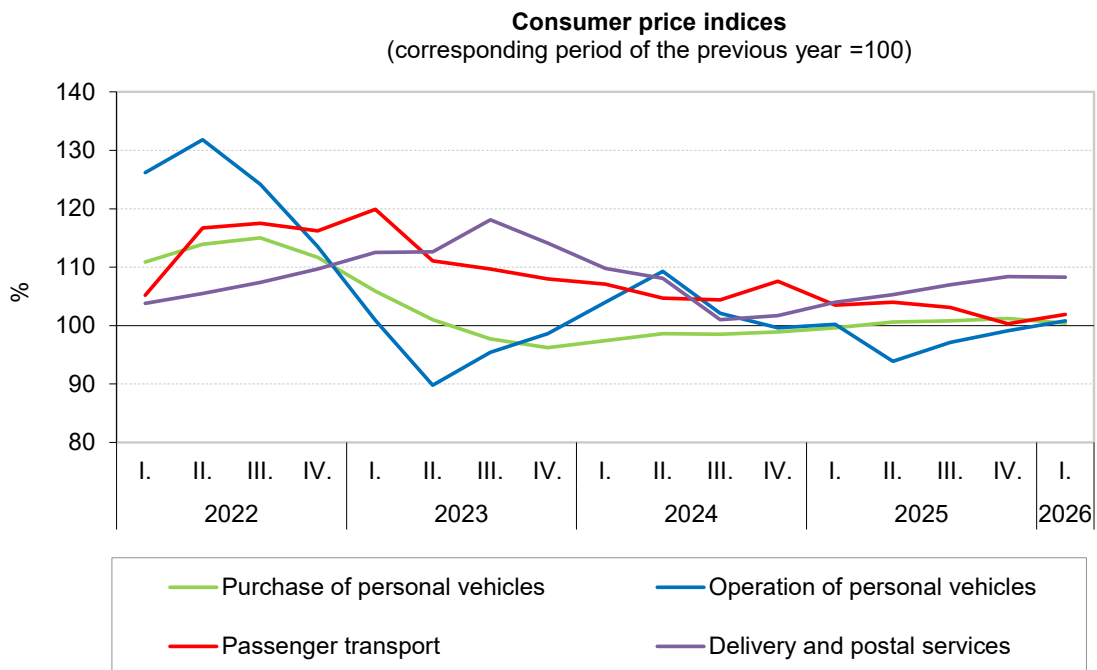
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In **'transport'**, prices of motor cars rose by 0.4% and passenger transport services by 1.9%. Prices of fuels and lubricants for personal transport equipment fell by 1.6% in Q1 2026. The average price of Natural 95 petrol was CZK 38.06 per litre and the price of diesel was CZK 42.02 per litre in March.



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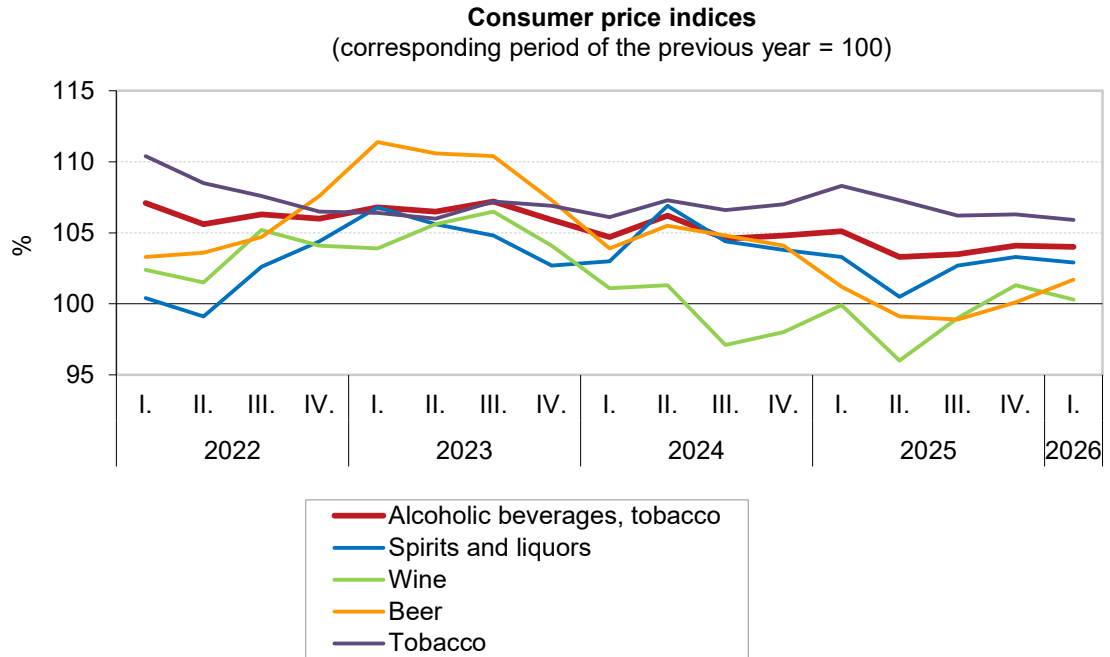
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In 'alcoholic beverages, tobacco', prices of tobacco products increased by 5.9%, wine by 0.3%, beer by 1.7% and spirits and liquors by 2.9%.



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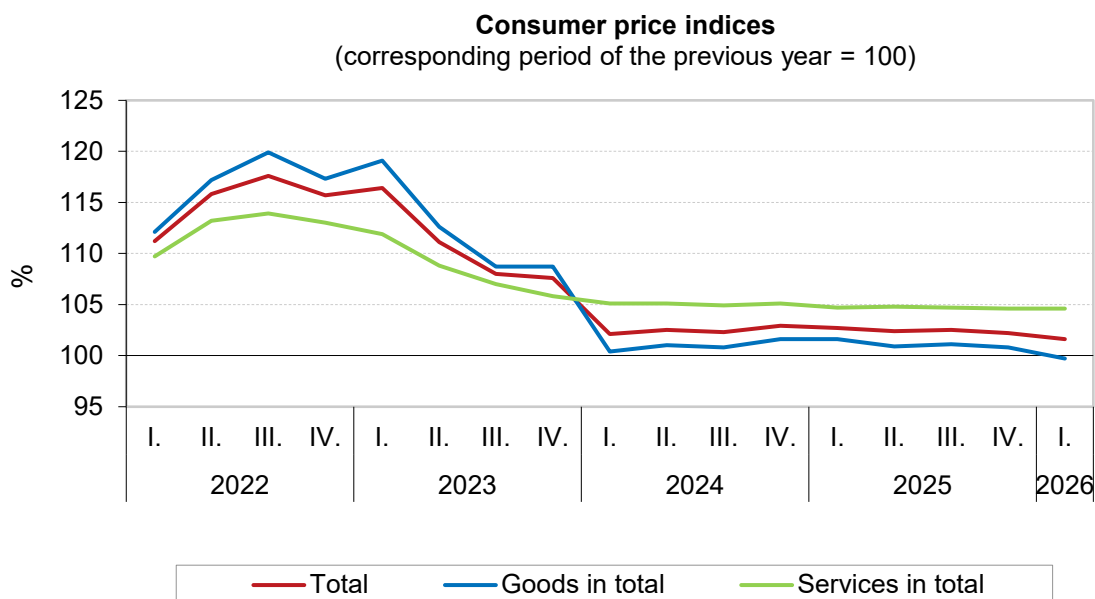
In **'restaurants and accommodation services'**, prices of food and beverage serving services increased by 4.2% and prices of accommodation services by 6.7%.

In **'personal care, social protection and miscellaneous goods and services'**, prices of goods and services for personal care were higher by 1.4%.

In **'recreation, sport and culture'**, prices of package holidays increased by 2.6% and recreational services by 5.8%.

In **'furnishings, household equipment and routine household maintenance'**, prices of furniture and furnishings increased by 2.0%. Prices of non-durable household goods went down by 2.2%.

The aforementioned fluctuations in consumer prices resulted in a decrease in prices of **goods in total** by 0.3% and an increase in prices of **services** by 4.6%.



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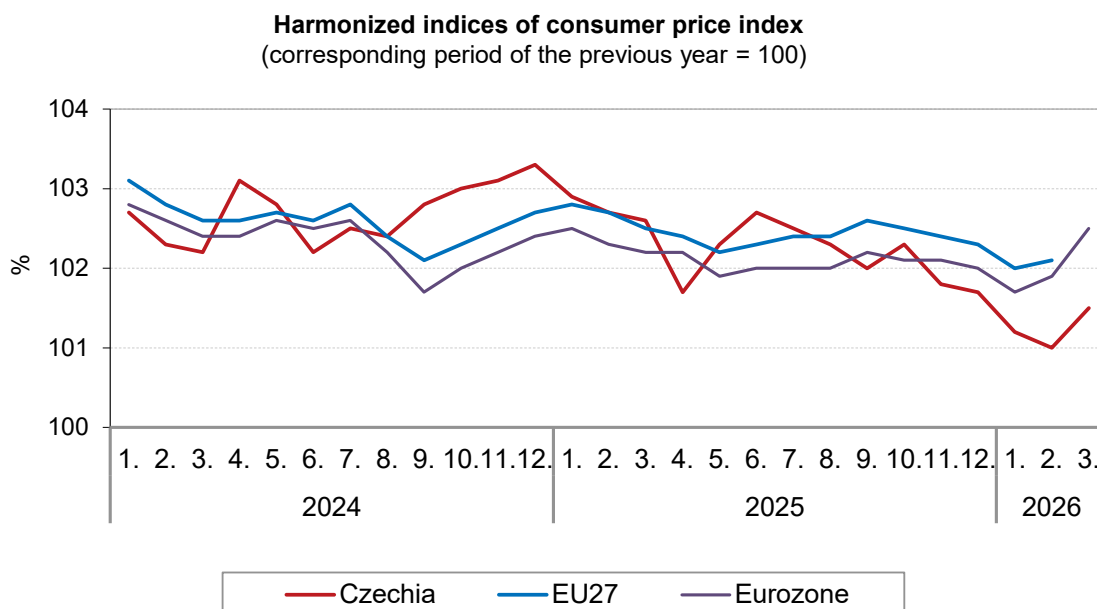
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Harmonized index of consumer prices (HICP) ¹⁾

According to preliminary calculations, the HICP in Czechia in **March** increased by 0.6%, **month-on-month** and by 1.5% (1.0% in February), **year-on-year**. According to flash estimates of Eurostat, the MUICP (Monetary Union Index of Consumer Prices) in **March 2026** amounted to 2.5%, year-on-year (1.9% in February), 2.8% in Germany and 3.7% in Slovakia. It was the highest in Croatia (4.7%) in March and the lowest in Italy and in Cyprus (equally 1.5%).

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 2.1% in February (0.1 percentage point up on January). In February, the rise in prices was the highest in Romania (8.3%) and the lowest in Denmark (0.5%).



¹⁾ Imputed rentals are excluded from the HICP.

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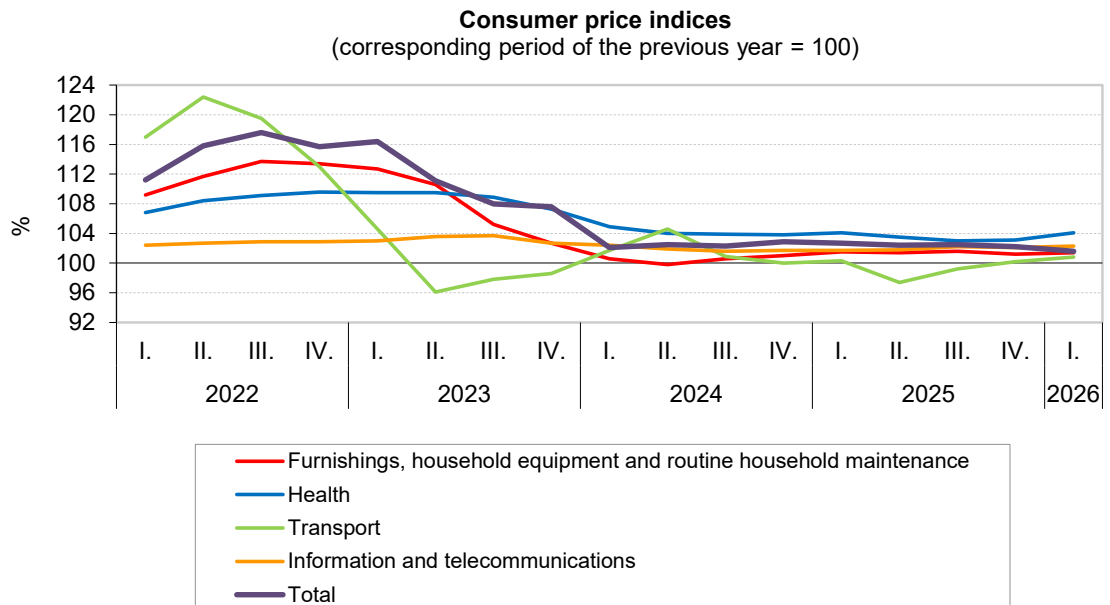
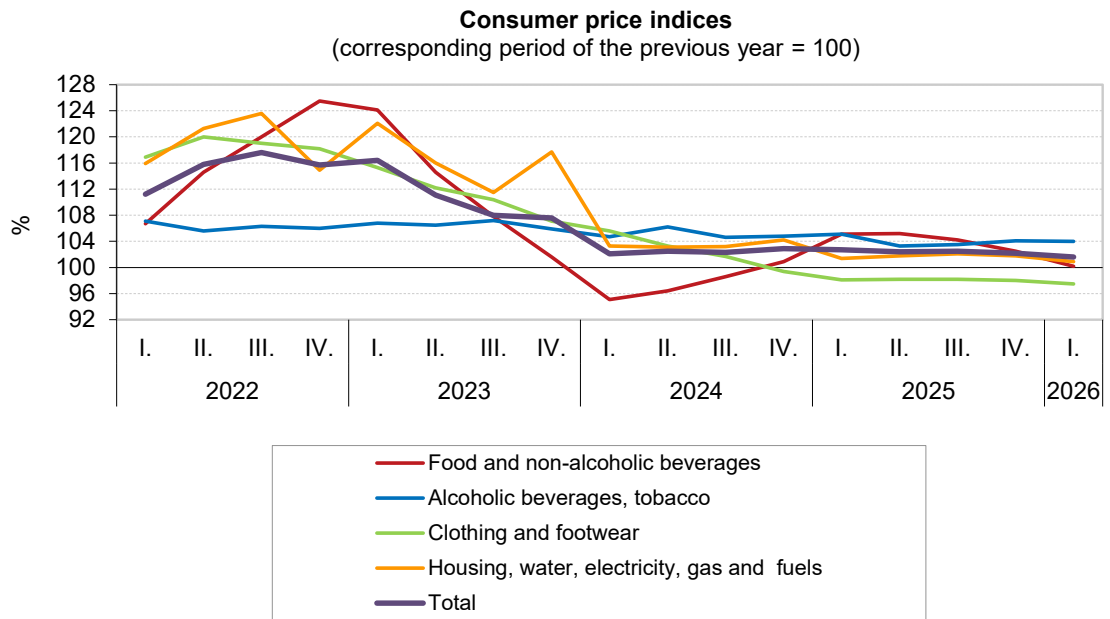
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Development of the consumer price index broken down by COICOP divisions



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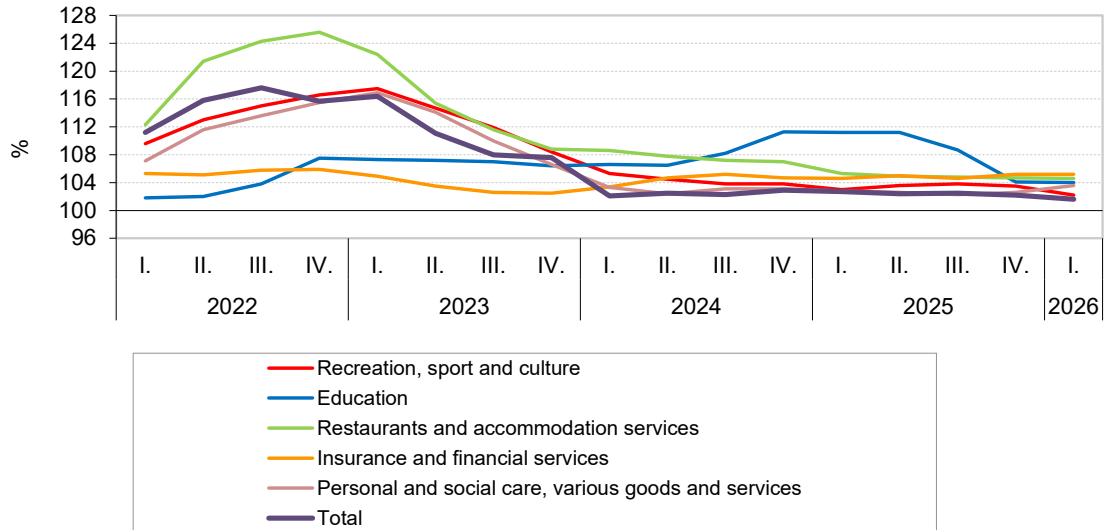
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Consumer price indices
(corresponding period of the previous year = 100)



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Consumer price indices in the Q1 2026

COICOP	Division	Constant weights of 2024 in %	2025				2026			
			corresponding period of the previous year = 100							
			1.Q	2.Q	3.Q	4.Q	January	February	March	1.Q
00	Total	1000.0	102.7	102.4	102.5	102.2	101.6	101.4	101.9	101.6
	including									
01	Food and non-alcoholic beverages	168.6	105.1	105.2	104.2	102.5	101.3	100.4	98.9	100.2
01.11	Cereals and cereal products	27.4	101.8	102.3	102.4	102.6	103.2	101.5	100.8	101.9
01.12	Meat	38.7	103.1	103.6	105.2	105.3	102.6	102.9	101.6	102.4
02	Alcoholic beverages, tobacco	82.9	105.1	103.3	103.5	104.1	104.7	104.0	103.3	104.0
03	Clothing and footwear	39.1	98.1	98.2	98.2	98.0	97.4	97.7	97.4	97.5
04	Housing, water, electricity, gas and other fuels	269.8	101.4	101.8	102.1	101.8	100.8	100.8	101.0	100.9
	of which :									
04.1	Actual rentals for housing	34.5	106.5	106.0	105.7	106.1	106.3	106.1	106.1	106.2
04.2	Owner occupied housing costs (imputed rentals for housing)	119.3	103.2	104.5	104.9	104.8	105.1	105.1	105.4	105.2
04.510	Electricity	43.0	95.2	95.3	96.2	95.4	87.8	88.1	88.2	88.0
04.521	Natural gas and town gas	18.0	91.9	91.6	91.9	92.3	93.5	92.8	94.1	93.5
05	Furnishings, household equipment and routine household maintenance	51.2	101.5	101.4	101.6	101.2	101.3	101.1	101.7	101.4
06	Health	25.7	104.1	103.5	103.0	103.1	104.4	103.9	103.9	104.1
07	Transport	99.1	100.3	97.4	99.2	100.2	98.4	98.5	105.5	100.8
	of which									
07.22	Fuels and lubricants for personal transport equipment	30.6	95.6	87.9	93.3	96.4	91.1	91.6	113.1	98.4
08	Information and communication	47.5	101.7	101.8	102.2	102.1	101.5	102.4	102.9	102.3
09	Recreation, sport and culture	78.5	103.0	103.6	103.8	103.5	102.5	101.7	102.5	102.2
	of which									
09.80	package holidays	18.5	103.0	105.2	105.1	103.8	102.4	102.2	103.1	102.6
10	Education services	6.1	111.2	111.2	108.7	104.1	104.0	104.1	103.9	104.0
11	Restaurants and accommodation	68.2	105.3	104.9	104.8	104.7	104.9	104.6	104.4	104.6
12	Insurance and financial services	17.8	104.6	105.0	104.6	105.2	105.9	105.0	104.6	105.2
13	Personal care, social protection and miscellaneous goods and services	45.5	102.8	102.6	102.3	102.6	103.4	103.7	103.7	103.6

Elaborated by Consumer Prices Statistics Unit of the CZSO

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