

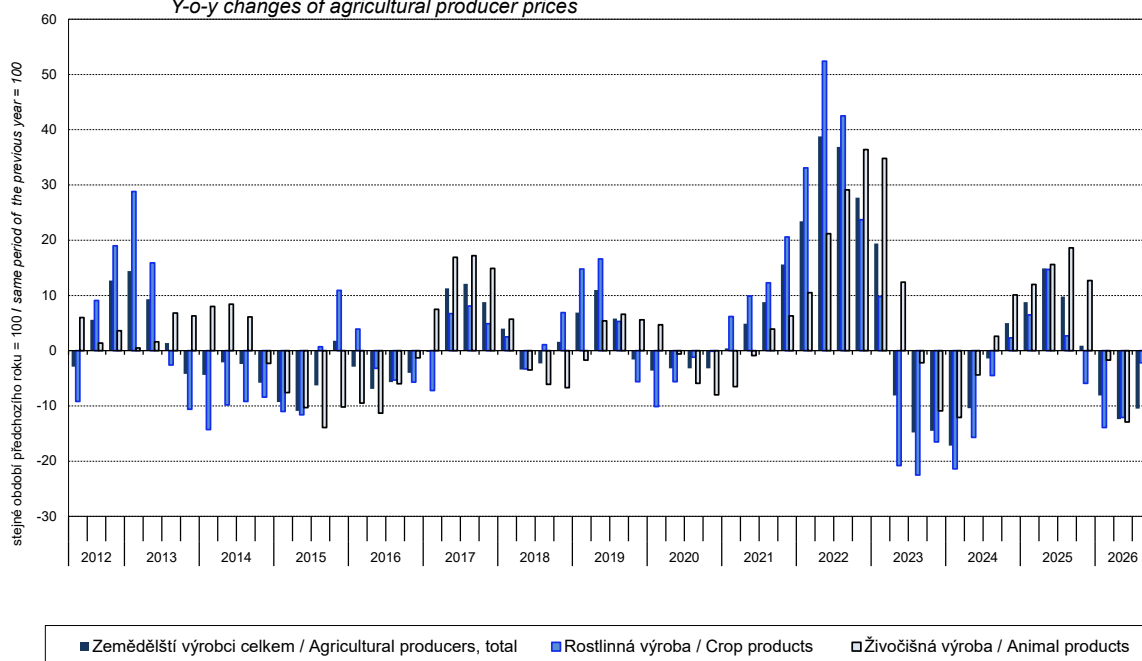
Trends in producer price indices in Q3 2026

16. 10. 2026

In Q3 2026, compared to Q2 2026, agricultural producer prices went down by 1.9% and were lower by 10.5% year-on-year (y-o-y) in Q3 2026. In Q3 2026, compared to Q2 2026, industrial producer prices were higher by 0.7 % and increased by 2.4% y-o-y in Q3 2026. Construction work prices rose by 0.8% in Q3 2026 compared to Q2 2026 and were 4.3% higher y-o-y in Q3 2026. Service producer prices in the business sphere fell by 0.6% in Q3 2026 compared to Q2 2026 and rose by 2.8% y-o-y in Q3 2026.

In **Q3 2026**, compared to **Q2 2026**, **agricultural producer prices** were lower by 1.9%. Falling were prices of milk (-2.4%), pigs for slaughter (-6.8%), cattle for slaughter (-9.2%) and eggs (-20.3%). Growth was recorded in prices of poultry (+0.4%), oilseeds (+2.0%) and cereals (+2.9%). **Agricultural producer prices** decreased by 10.5%, **y-o-y**, in **Q3 2026**. Prices in crop production fell by 2.2% due to lower prices of cereals (-7.2%) and fruit (-4.1%). Prices rose for oilseeds (+1.6%), vegetables (+6.0%) and potatoes (+7.6%). Prices in animal production decreased by 19.4%. Falling were prices of eggs (-7.1%), cattle for slaughter (-9.5%), pigs for slaughter (-25.6%) and milk (-27.1%). Increase was observed in prices of poultry (+2.2%).

Graf 1 Meziroční změny cen zemědělských výrobců
Y-o-y changes of agricultural producer prices



In **Q3 2026**, compared to Q2 2026, **industrial producer prices** were higher by 0.7%. Prices rose markedly in 'coke, refined petroleum products'. Higher were prices in 'textiles' (+4.2%), 'basic metals' (+2.5%) and 'wood and products of wood and cork, except furniture' (+2.4%). Prices increased in 'electricity, gas, steam and air conditioning' (+1.6%). Prices decreased in 'food products' (-0.8%), thereof 'preserved meat and meat products' (-2.0%).



Tab. 1 Indexy cen průmyslových výrobců, mezičtvrtletní srovnání
Industrial producer price indices, quarter-on-quarter comparison

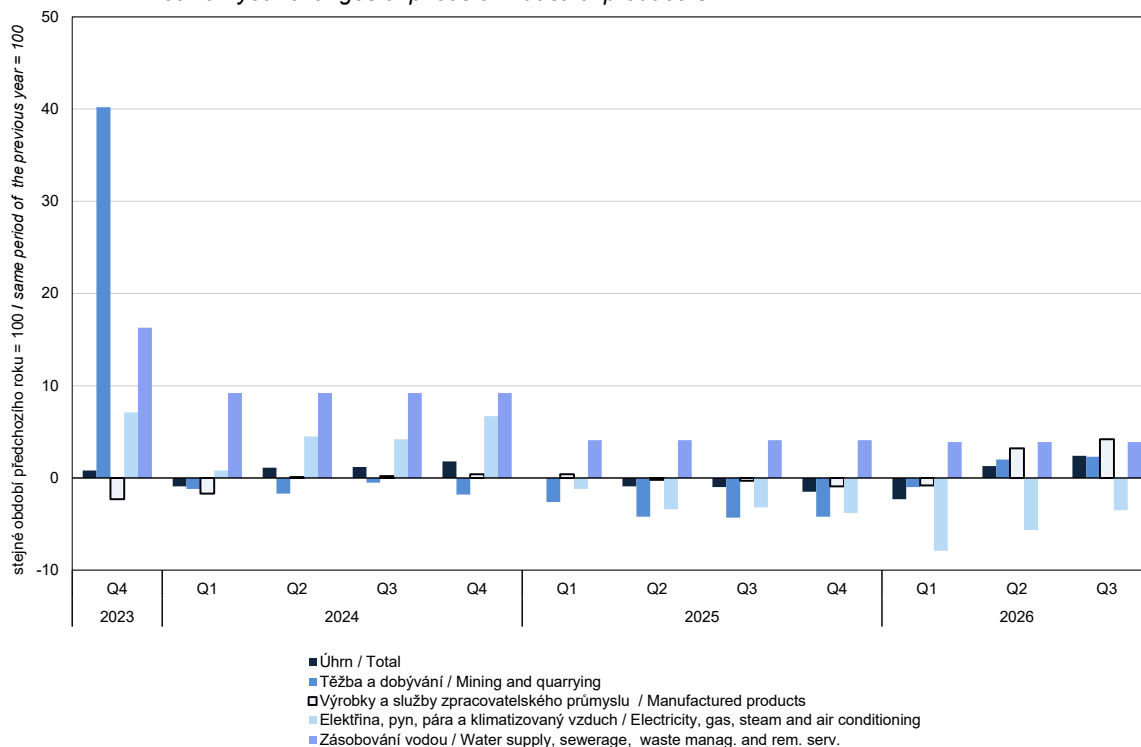
Kód	Název	2025	2026			Name
		Q4	Q1	Q2	Q3	
	ÚHRN	99,8	99,8	102,2	100,7	TOTAL
B	Těžba a dobývání	99,6	100,3	102,6	99,8	Mining and quarrying
C	Výrobky a služby zpracovatelského průmyslu	99,4	100,6	103,5	100,6	Manufactured products
D	Elektřina, plyn, pára a klimatizovaný vzduch	101,2	96,5	97,3	101,6	Electricity, gas, steam and air conditioning
E	Zásobování vodou; služby související s odpadními vodami	100,0	103,9	100,0	100,0	Water supply, sewerage, waste manag., remed. services

In Q3 2026, industrial producer prices were higher by 2.4% y-o-y (+1.3% in Q2 2026). Prices went up significantly in 'coke, refined petroleum products'. Prices were higher in 'chemicals and chemical products' (+13.9%), 'wood and products of wood and cork, except furniture' (+11.4%), 'printing and recording services' (+7.1%) and 'basic metals' (+5.5%). Prices decreased in 'electricity, gas, steam and air conditioning' (-3.5%) and 'paper and paper products' (-1.1%). Prices went down in 'food products' (-5.3%), thereof 'dairy products' (-14.9%) and 'preserved meat and meat products' (-6.7%).

Tab. 2 Indexy cen průmyslových výrobců, meziroční srovnání
Industrial producer price indices, year-on-year comparison

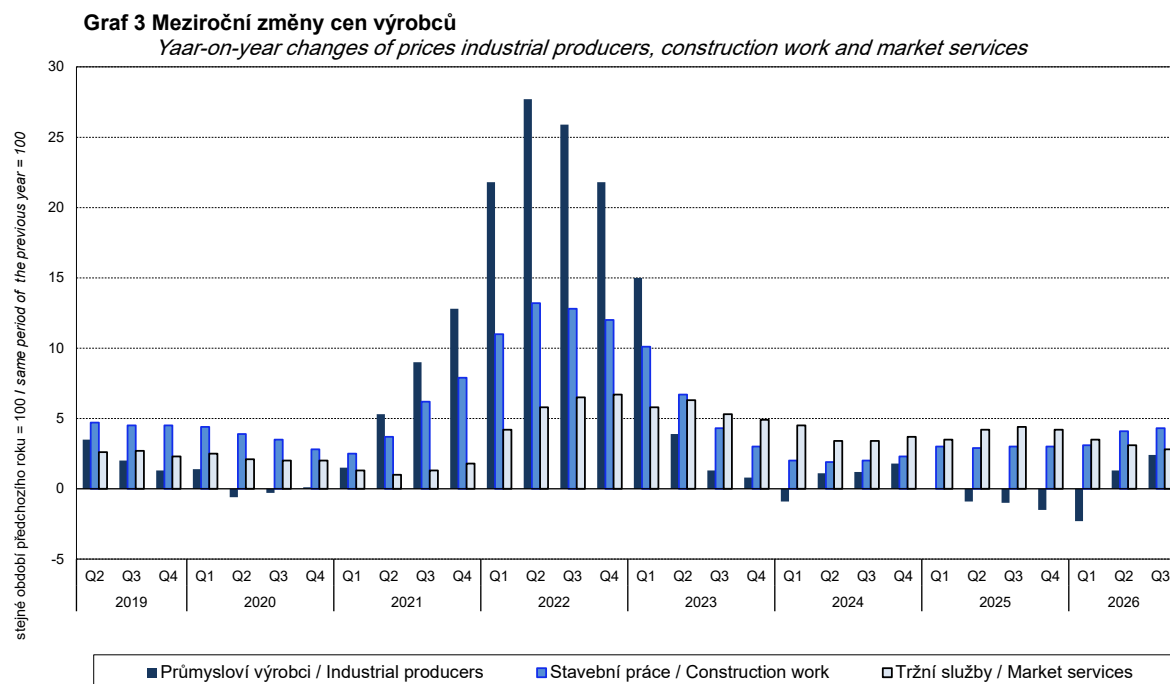
Kód	Název	2026					Name
		Q2	červenec July	srpen August	září September	Q3	
	ÚHRN	101,3	101,6	102,0	103,7	102,4	TOTAL
B	Těžba a dobývání	102,0	101,9	102,3	102,6	102,3	Mining and quarrying
C	Výrobky a služby zpracovatelského průmyslu	103,2	103,2	104,0	105,3	104,2	Manufactured products
D	Elektřina, plyn, pára a klimatizovaný vzduch	94,4	96,1	95,2	98,4	96,5	Electricity, gas, steam and air conditioning
E	Zásobování vodou; služby související s odpadními vodami	103,9	103,9	103,9	103,9	103,9	Water supply, sewerage, waste manag., remed. services

Graf 2 Meziroční změny cen průmyslových výrobců
Year-on-year changes of prices of industrial producers





In **Q3 2026**, according to the estimate, **construction work prices** compared to **Q2 2026** (after updating) rose by 0.8%. Prices of construction materials and products input also rose by 0.8%. **Construction work prices**, as estimated, grew by 4.3% in **Q3 2026** compared to **Q3 2025** (after updating). Prices of construction materials and products input increased by 6.9%, **y-o-y**.



In **Q3 2026**, compared to **Q2 2026**, **service producer prices in the business sphere** fell by 0.6%. On the decrease were prices for 'programming and broadcasting services' (-11.1%), 'advertising and market research services' (-9.8%) and 'motion picture, video and television programme production services, sound recording and music publishing' (-1.4%). Rising were prices of 'employment services' (+1.8%) and 'publishing services' (+1.0%). Service producer prices in the business sphere, excluding advertising services, went up by 0.3%. **Service producer prices in the business sphere** grew in total by 2.8%, **y-o-y**, in **Q3 2026**. Increasing were prices of 'advertising and market research services' (+11.8%), 'employment services' (+11.2%), 'security and investigation services' (+6.3%) 'information services' (+4.8%) and 'motion picture, video and television programme production services, sound recording and music publishing' (+5.6%). Prices of 'architectural and engineering services' (-2.3%) were lower. Service producer prices in the business sphere, excluding advertising services, grew by 2.2%.

Note: For internal reasons, the Czech decimal comma is used instead of the English decimal point as a decimal separator in tables of this analysis.

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