

# YEAR-ON-YEAR GROWTH OF CONSUMER PRICES ACCELERATED MODERATELY

## Consumer price indices – inflation – October 2025

Consumer prices increased by 0.5%, month-on-month. This development came mainly from higher prices in 'food and non-alcoholic beverages'. The year-on-year growth of consumer prices amounted to 2.5% in October, which was 0.2 percentage points up on September.

### Month-on-month comparison

Consumer prices in October increased by 0.5%, month-on-month. In 'food and non-alcoholic beverages', especially prices of bread and cereals were higher by 1.6%, fruit by 2.1%, pork by 2.1%, eggs by 5.1%, chocolate and chocolate products by 4.9% and UHT semi-skimmed milk by 3.4%. Prices of butter decreased by 9.4% and potatoes by 10.9%, month-on-month. Consumer prices growth in 'alcoholic beverages, tobacco' came mainly from higher prices of wine by 4.2% and tobacco products by 0.9%. In 'housing, water, electricity, gas and other fuels', prices of actual rentals were higher by 0.5%. In 'recreation and culture', mainly prices of package holidays rose by 0.5%. In 'clothing and footwear', prices of shoes and other footwear were higher by 2.2% and prices of garments by 0.6%.

Prices of goods in total increased by 0.7% and prices of services by 0.4%.

### Year-on-year comparison

*"Consumer price development in October was again significantly influenced by prices of food and non-alcoholic beverages, which accelerated their year-on-year growth to 3.6%. In comparison with the last month, they increased by 1.1%,"* noted Pavla Sediva, head of Consumer Price Statistics Unit of CZSO.

Consumer prices increased by 2.5% in October, which was 0.2 percentage points up on September, year-on-year. This **acceleration**<sup>1)</sup> of the year-on-year price growth was mainly influenced by price development in 'food and non-alcoholic beverages' and in 'alcoholic beverages, tobacco'. In 'food and non-alcoholic beverages', especially prices of bread and cereals accelerated their increase to 3.0% (increase by 2.1% in September), meat to 6.3% (increase by 4.4% in September) and items in group milk, cheese and eggs to 7.7% (increase by 5.9% in September). In 'alcoholic beverages, tobacco', prices of spirits were higher by 4.0% (increase by 3.3% in September) and tobacco products by 6.0% (increase by 5.5% in September). Prices of wine turned from decrease by 1.0% in September into rise by 2.0% in October and prices of beer turned from decrease by 0.7% into rise by 1.1%.

The biggest influence on the **growth of the year-on-year price level** in October came from prices in 'food and non-alcoholic beverages', where, beside already mentioned above, prices of chocolate and chocolate products increased by 18.1%, coffee by 25.8% and cocoa by 20.2%. Next in order of influence were prices in 'housing, water, electricity, gas and other fuels', where beside owner occupied housing costs, prices of actual rentals<sup>2)</sup> increased by 5.8%, water supply by 4.2%, sewage collection by 3.7% and heat and hot water by 1.8%. Prices of electricity decreased by 3.6%, natural gas by 7.9% and solid fuels by 2.6%, year-on-year. Prices in 'alcoholic beverages, tobacco' increased by 4.3%. Price development in 'recreation and culture' came mainly from higher prices of recreational and cultural services by 6.1% and prices of package holidays by 5.4%. In 'restaurants and hotels', prices of catering services were higher by 4.4% and accommodation services by 6.6%. Year-on-year overall price level decrease came again (continuously already from the last

<sup>1)</sup> **Acceleration/slowdown** of the year-on-year price index growth is difference between current and previous year-on-year index. It therefore depends on the change of current month-on-month index and also on the change of base – month-on-month index (growth/decrease) in the same month of the last year.

<sup>2)</sup> Actual rentals includes both newly concluded contracts and existing ones.

year October) from prices in 'clothing and footwear', where prices of garments were lower by 1.6% and foot and other footwear by 3.3%.

Owner occupied housing costs (imputed rentals) increased by 4.8%, year-on-year (increase by 4.9% in September), mainly due to growth of prices of new real estates. The overall consumer price index excluding owner occupied housing costs was 102.2%, year-on-year. (More information: [Methodological note](#).)

Prices of goods in total and services went up (1.3% and 4.6%, respectively).

Level of consumer price base index with base period the average of 2015 = 100, was 156.1% in October (155.3% in September).

Inflation rate, i.e. the increase in the average consumer price index in the twelve months to October 2025 compared with the average CPI in the previous twelve months, amounted to 2.6% (2.6% also in September).

#### **Harmonized index of consumer prices (HICP)<sup>3)</sup>**

According to preliminary calculations, the HICP in Czechia **in October** increased by 0.5%, **month-on-month** and 2.3% (2.0% in September), **year-on-year**. According to flash estimates of Eurostat, **the MUICP** (Monetary Union Index of Consumer Prices) **in October 2025** amounted to 2.1%, year-on-year (2.2% in September), 2.3% in Germany and 3.8% in Slovakia. It was the highest in Estonia in October (4.5%) and the lowest in Cyprus (0.3%).

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 2.6% **in September** (0.2 percentage point up on August). In September, the rise in prices was the highest in Romania (8.6%) and the lowest in Cyprus, where the prices remained unchanged, year-on-year (0.0%).

(More information on the Eurostat's web pages: [HICP](#).)

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Starting **from January 2026**, the consumer price indices will be calculated on the base of updated Classification of Individual Consumption by Purpose (CZ-COICOP) see [CZ-COICOP 2018](#)

Starting **from January 2026**, according to Regulation (EU) 2016/792 of the European parliament and the Council also new index time series with the base period average of 2025 = 100 will be introduced. The indices to other bases will be calculated from this time series (previous month = 100, corresponding period of last year = 100 and annual rolling average, i.e. the average of index numbers over the last 12 months to the average for the previous 12 months).

Starting **from January 2026**, consumer price indices will be calculated on updated weights, which will be based on household expenditures in 2024 and will be modified by the estimate of expenditures in 2025.

Survey of Average Consumer Prices of Food (preliminary monthly one-time field survey) will be terminated at the end of year 2025. Information about monthly average prices are available in table "[Average consumer prices of selected goods](#)". These data are calculated from "scanner data" (data from cash registers of retail chains) and are the basis for calculation of monthly price indices of consumer prices.

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<sup>3)</sup> Imputed rentals are excluded from the HICP.