

## Commentary

Estimated economic result of Czech agriculture for 2025 reached CZK 26,546.6 million, representing a year-on-year increase of 110.2%. This is the highest value of entrepreneurial income since 2004.

According to preliminary results, the output of the agricultural industry at basic current prices reached CZK 193,360.3 million in 2025, of which crop output accounted for CZK 98,506.3 million, animal output CZK 81,384.2 million, agricultural services output CZK 6,771.6 million, and inseparable non-agricultural secondary activities CZK 6,698.3 million.

The value of crop output increased year-on-year by 7.7%. A year-on-year increase in production value occurred for cereals (+8.4%), industrial crops (+2.3%), forage plants (+2.9%), fresh vegetables (+14.1%), fruit (+195.8%), and wine (+50.7%). A year-on-year decline was recorded for potatoes (-1.4%).

The increase in crop production value was mainly due to good harvests. Compared with the previous year, harvests increased for most crop commodities: wheat (+13.2%), barley (+10.8%), oats (+35.4%), grain maize (+12.7%), rape seed (+7.9%), sunflower (+43.5%), protein crops (+15.1%), and hops (+6.4%). Vegetable (+18.6%) and potatoes (+12.0%) yields also increased year-on-year, while their prices fell (vegetables -3.6%, potatoes -12.1%). A significant year-on-year increase occurred in fruit (+197.1%) and wine (+37.1%) harvests. Sugar beet recorded both a decrease in harvest (-7.9%) and price (-17.2%).

The value of animal output increased by 15.5% compared with 2024. Production value rose for cattle (+36.4%) and poultry (+9.1%), while it declined for pigs (-4.3%). The value of animal products increased by 16.7%, with higher production of milk (+14.1%) and eggs (+43.6%).

The increase in animal output value was mainly driven by higher prices of cattle (+33.6%), poultry (+12.3%), milk (+16.8%), and eggs (+36.0%). Pig prices, on the other hand, declined (-10.0%).

In the output of the agricultural industry at basic current prices in 2025, the share of crop production (50.9%) predominated over animal production (42.1%). Agricultural work carried out by contractors, i.e. the agricultural services output, accounted for 3.5% and inseparable non-agricultural secondary activities, covering also renewable energy production, for 3.5%.

Within crop output, the largest components were cereals (39.9%), industrial crops (22.6%), and forage plants (14.9%); within animal output, milk production predominated (54.5%), followed by cattle for slaughter (15.6%), pigs for slaughter (11.6%), and poultry (10.7%).

The production value includes subsidies on products; their total volume decreased year-on-year by 2.1%.

Intermediate consumption increased slightly year-on-year by 1.5% to CZK 117,750.0 million. Its share in agricultural output (excluding subsidies on products) amounted to 61.5%. Intermediate consumption consisted mainly of animal feedingstuffs (30.7%) and energy and lubricant consumption (16.3%). Gross value added reached CZK 75,610.3 million, representing a year-on-year increase of 28.9%.

In constant 2000 prices, agricultural output reached CZK 116,057.4 million in 2025, an increase of 5.8% compared with the previous year. The value of crop output increased year-on-year by 10.8% to CZK 60,118.2 million. The value of animal output rose slightly by 0.6% to CZK 49,615.6 million. Output values in constant prices are directly influenced by the volume of production.

The estimated amount of other subsidies on production for 2025 reached CZK 33,492.5 million, a year-on-year increase of 0.8%.

*Compared with 2024, the compensation of employees was higher (+3.5%), while the estimated number of full-time equivalent workers decreased year-on-year by 0.2%.*

