

ANALYSIS

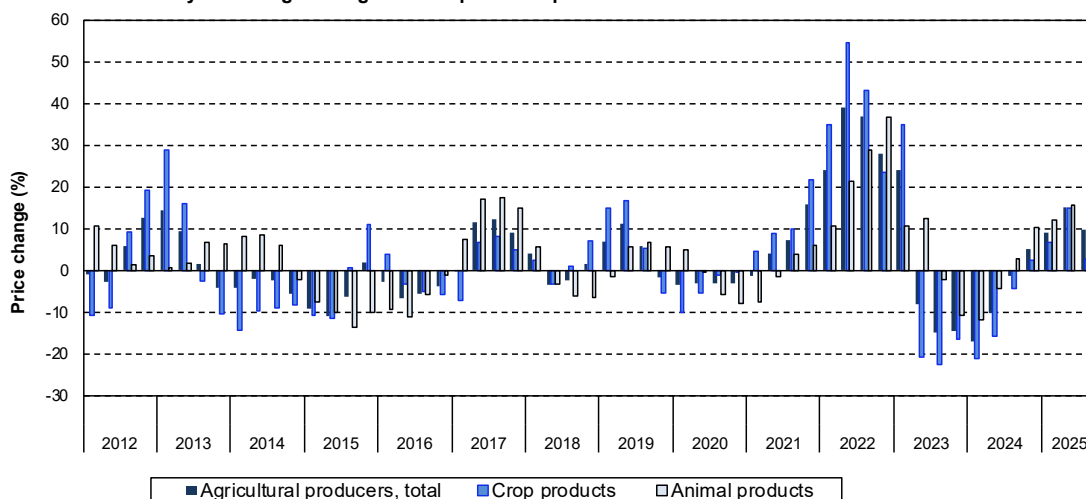
16 October 2025

Trends in producer price indices in Q3 2025

In Q3 2025, compared to Q2 2025, agricultural producer prices went down by 4.0%, and were higher by 9.8% year-on-year (y-o-y) in Q3 2025. In Q3 2025, compared to Q2 2025, industrial producer prices were lower by 0.4 %, and fell by 1.0% y-o-y in Q3 2025. Construction work prices rose by 0.4% in Q3 2025 compared to Q2 2025, and were 2.7% higher y-o-y in Q3 2025. Service producer prices in the business sphere declined by 0.4% in Q3 2025 compared to Q2 2025, and were 4.4% higher y-o-y in Q3 2025.

In Q3 2025, compared to Q2 2025, agricultural producer prices were lower by 4.0%. Falling were prices of fresh vegetables (-21.4%), eggs (-10.2%), oilseeds (-9.8%) and cereals (-6.9%). Growth was recorded for prices of cattle for slaughter (+11.2%), poultry (+3.1%), pigs for slaughter (+1.7%) and milk (+1.3%). **Agricultural producer prices** increased by 9.8%, **y-o-y**, in Q3 2025. Prices in crop production grew by 2.7% due to higher prices of oilseeds (+8.9%), fruit (+8.2%) and cereals (+4.3%). Prices of potatoes (-20.7%) and fresh vegetables (-7.7%) went down. Prices in animal production rose by 18.6%. Increase was observed in prices of eggs (+43.4%), cattle for slaughter (+38.9%), milk (+19.7%) and poultry (+11.3%). Prices of pigs for slaughter were lower by 5.3%.

Chart 1 Year-on-year changes of agricultural producer prices



In Q3 2025, compared to Q2 2025, **industrial producer prices** were lower by 0.4%. Prices were lower in 'chemicals and chemical products' (-2.8%), 'crude petroleum and natural gas' and 'rubber and plastics products' (-1.6% both). Prices rose in 'coke, refined petroleum products'. Higher were prices in 'wood and products of wood and cork, except furniture' (+0.5%), 'food products' and 'other non-metallic mineral products' (+0.4% both).

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Table 1 Industrial producer price indices, quarter-on-quarter comparison

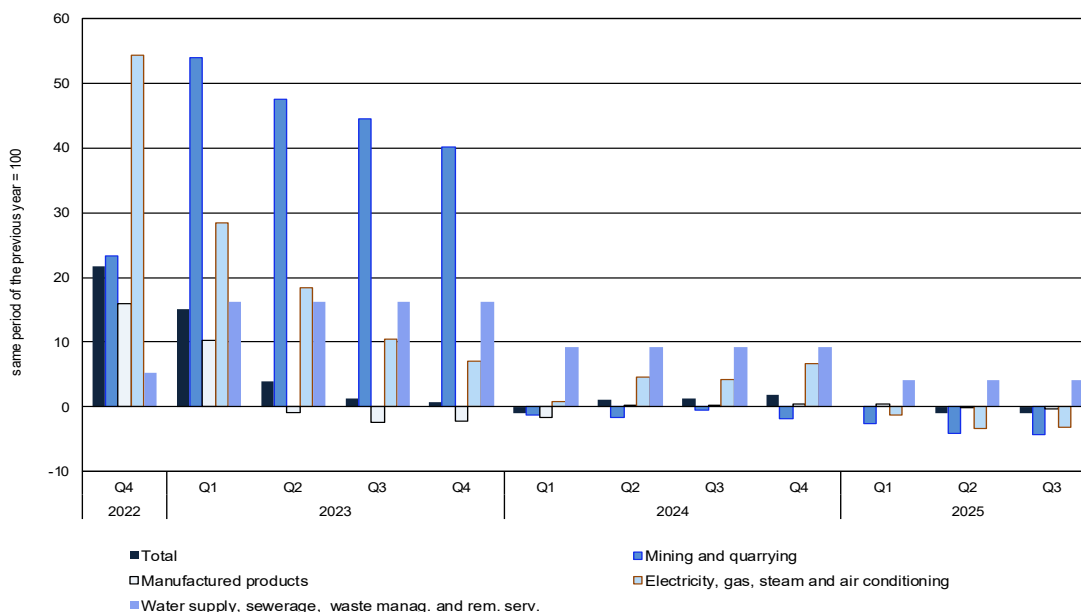
Code	Name	Year			
		2024	2025		
		Q4	Q1	Q2	Q3
	TOTAL	100,3	100,6	98,5	99,6
B	Mining and quarrying	99,5	97,1	99,5	99,6
C	Manufactured products	100,0	100,6	99,5	99,6
D	Electricity, gas, steam and air conditioning	101,9	100,8	94,9	99,3
E	Water supply, sewerage, waste manag. and rem. serv.	100,0	104,1	100,0	100,0

In Q3 2025, industrial producer prices were lower by 1.0% **y-o-y** (-0.9% in Q2 2025). Prices decreased markedly in ‘crude petroleum and natural gas’ (-14.2%). Lower were prices in ‘coke, refined petroleum products’. Prices fell also in ‘coal and lignite’ (-10.6%) and ‘chemicals and chemical products’ (-7.1%). Prices grew in ‘other mining and quarrying products’ (+5.9%), ‘wood and products of wood and cork, except furniture’ (+4.9%) and ‘wearing apparel’ (+4.4%). On the increase were also prices in ‘food products’ (+3.4%).

Table 2 Industrial producer price indices, year-on-year comparison

Code	Name	Year				
		2025				
		Q2	July	August	September	Q3
	TOTAL	99,1	98,8	99,2	99,0	99,0
B	Mining and quarrying	95,8	95,8	95,6	95,9	95,7
C	Manufactured products	99,8	99,6	99,6	99,9	99,7
D	Electricity, gas, steam and air conditioning	96,6	96,0	98,0	96,2	96,8
E	Water supply, sewerage, waste manag. and remediation serv.	104,1	104,1	104,1	104,1	104,1

Chart 2 Year-on-year changes of prices of industrial producers



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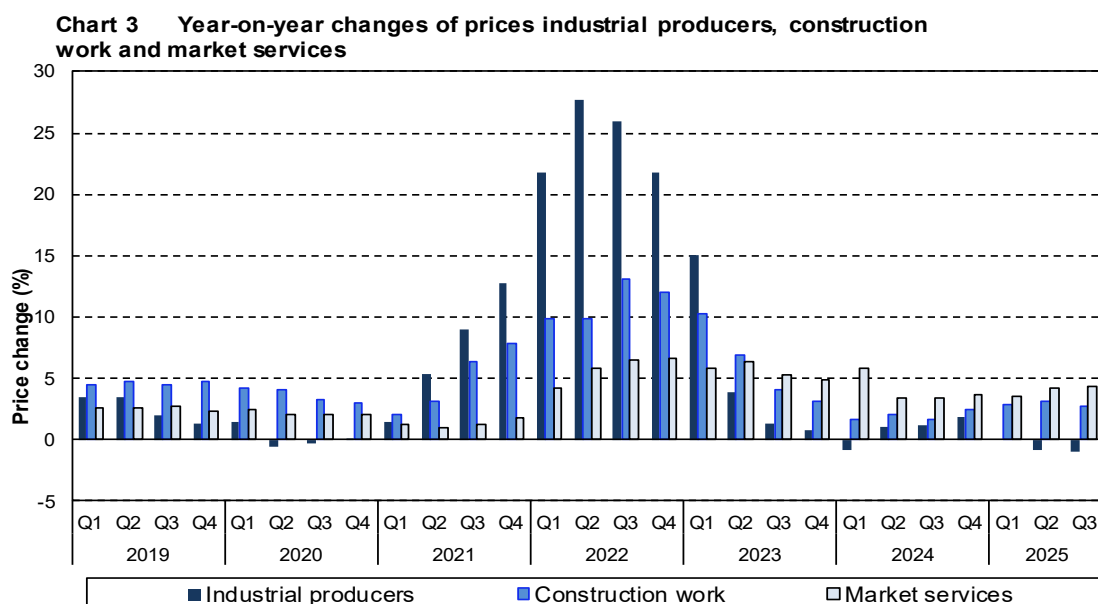
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In **Q3 2025**, according to the estimate, **construction work prices** compared to **Q2 2025** (after updating) were higher by 0.4%. Prices of construction materials and products input fell by 0.1%. **Construction work prices**, as estimated, grew by 2.7% in **Q3 2025** compared to **Q3 2024** (after updating). Prices of construction materials and products input increased by 1.0%, **y-o-y**.



In **Q3 2025**, compared to **Q2 2025**, **service producer prices in the business sphere** went down by 0.4%. On the decrease were prices in 'programming and broadcasting services' (-6.7%), 'advertising and market research services' (-6.6%), 'motion picture, video and television programme production services, sound recording and music publishing' (-2.2%) and 'employment services' (-0.9%). Rising were prices of 'information services' and 'insurance, reinsurance and pension funding services, except compulsory social security' (+0.9% both) and 'services of head offices; management consulting services' (+0.7%). Service producer prices in the business sphere, excluding advertising services, went up by 0.2%. **Service producer prices in the business sphere** grew in total by 4.4%, **y-o-y**, in **Q3 2025**. Prices of 'programming and broadcasting services' (+21.2%), 'advertising and market research services' (+18.0%), 'security and investigation services' (+12.2%) and 'employment services' (+9.2%) increased. Service producer prices in the business sphere, excluding advertising services, grew by 3.3%.

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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