

ANALYSIS

15 January 2014

PRODUCER PRICE INDICES IN Q4 2013 AND IN THE YEAR 2013

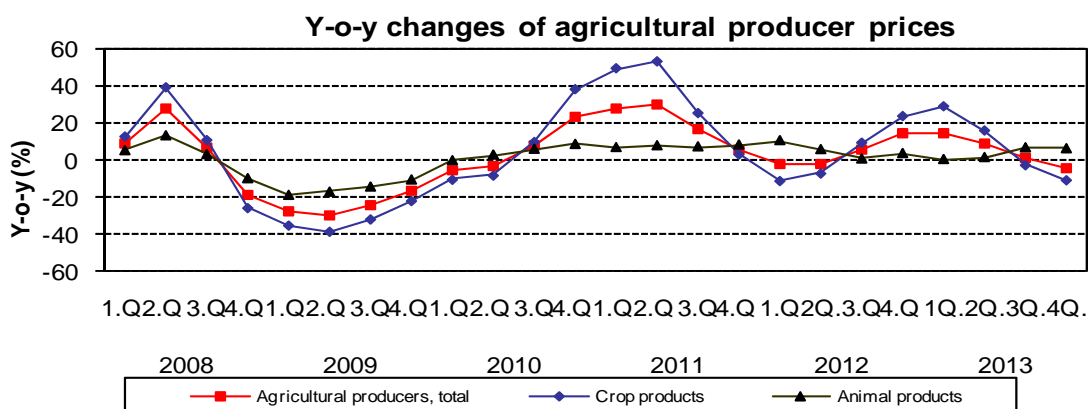
Compared to Q3 2013, in Q4 2013 agricultural producer prices fell by 1.9%, industrial producer prices increased by 0.3%, construction work prices were higher by 0.1% (according to an estimate) and prices of market services grew by 1.0%.

In Q4 2013 compared to Q4 2012, prices of agricultural producers were lower by 4.2%, construction work prices (according to an estimate) by 0.8% and prices of market services by 1.9%. Prices of industrial producers were higher by 0.8%.

In comparison with the year 2012, on average for the whole year 2013 prices of agricultural producers and industrial producers were both higher by 4.5% and 0.8%, respectively. Prices of construction works and market services were both lower by 1.1% and 1.5%, respectively.

Compared to Q3 2013, agricultural producer prices fell by 1.9% in Q4 2013. Decreasing were prices of fresh vegetables (-16.6%), cereals (-8.1%), oil plants (-4.4%), fruit (-4.1%) and potatoes (-2.2%). Among animal products price increases were recorded in eggs (+15.0%), milk (+7.7%) and pigs for slaughter (+2.9%).

Prices of agricultural producers in Q4 2013 compared to Q4 2012 were lower by 4.2%. Prices of crop products fell by 10.6% and animal products increased (+6.3%). Lower prices in crop products were mainly affected by prices of oil plants (-16.6%) and cereals (-20.7%). On the increase were prices of potatoes (+64.5%), fresh vegetables (+14.6%) and fruit (+3.3%). Among animal products price increases were recorded in milk (+19.9%) and pigs for slaughter (+1.1%). Prices of eggs (-21.1%) and cattle for slaughter (-5.2%) were both lower.



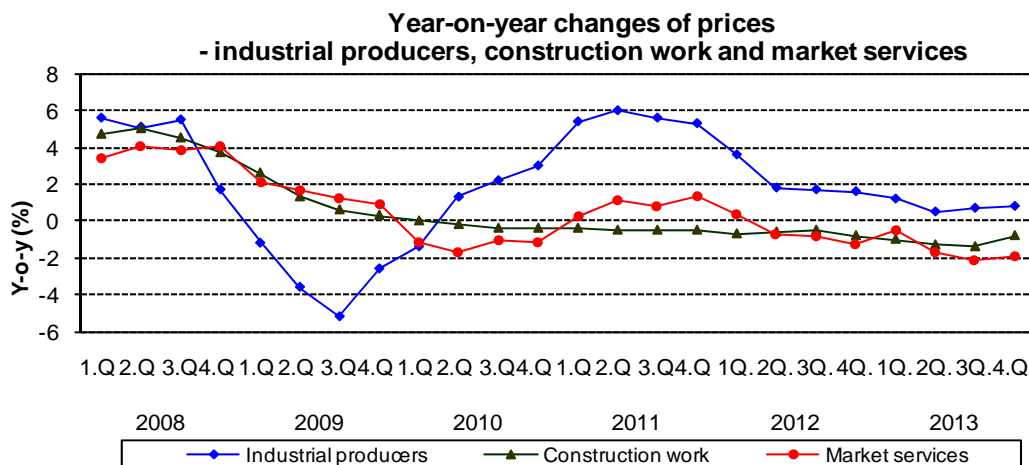
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In comparison with Q3 2013, prices of **industrial producers** increased by 0.3% in **Q4 2013**. Prices rose the most in 'transport equipment' (+2.5%), 'wood, wood products, paper, printing' (+1.2%) and 'rubber and plastic products, other non-metallic mineral products' (+1.1%). Prices fell in 'basic pharmaceutical products' (-1.6%), 'coke refined petroleum products' (-1.5%), 'chemicals and chemical products', 'food products, beverages, tobacco' and 'mining and quarrying' (-0.6% all).

Industrial producer price indices (previous quarter = 100)

Code	Name	2013			
		Q1	Q2	Q3	Q4
	TOTAL	100,9	99,3	100,2	100,3
B	Mining and quarrying	101,5	100,4	98,0	99,4
C	Manufactured products	100,3	99,2	100,2	100,4
CA	Food products, beverages, tobacco	100,7	99,5	100,6	99,4
CB	Textiles, clothes, leather and leather products	100,3	100,6	99,7	99,9
CC	Wood, wood product, paper, printing	100,1	99,6	99,9	101,2
CD	Coke, refined petroleum products	98,5	95,4	103,7	98,5
CE	Chemicals and chemical products	100,8	97,5	99,6	99,4
CF	Basic pharmaceutical products	100,7	97,9	99,5	98,4
CG	Rubber and plastic prod., other non-metallic min. prod.	100,2	99,6	99,7	101,1
CH	Basic metals, fabricated metal products	99,6	99,8	99,4	100,8
CI	Computer, electronic and optical products	100,0	99,7	100,0	100,9
CJ	Electrical equipments	100,7	99,7	98,7	100,7
CK	Machinery and equipment n.e.c.	100,6	99,3	99,9	100,6
CL	Transport equipment	100,8	100,1	100,0	102,5
CM	Furniture, other manufactured product	100,9	100,2	100,2	100,2
D	Electricity, gas, steam and air conditioning	103,7	99,6	100,1	100,4
E	Water supply, sewerage, waste manag. and rem. serv.	105,7	100,0	100,0	100,0

Prices of **industrial producers** rose by 0.8% in **Q4 2013 y-o-y** (+0.7% in Q3 2013). Prices were higher in 'electricity, gas, steam and air conditioning' (+3.7%), 'transport equipment' (+3.5%) and 'furniture, other manufactured products' (+1.3%). Prices increased in 'food

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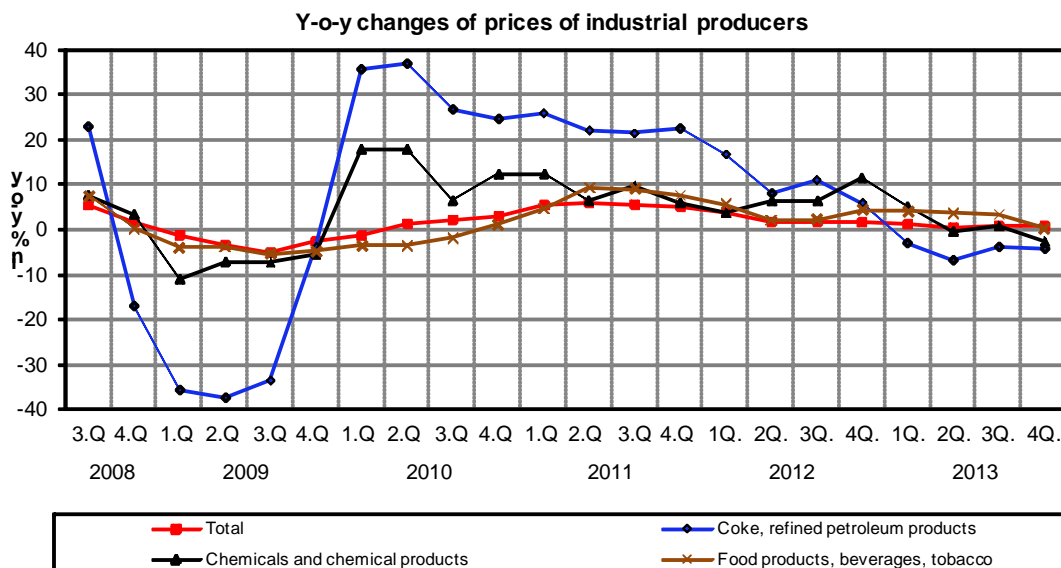
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products, beverages, tobacco' (+0.2%). Lower were prices in 'coke, refined petroleum products' (-4.1%), 'basic pharmaceutical products' (-3.5%) and 'chemicals and chemical products' (-2.7%).



According to an estimate, **construction work** prices in **Q4 2013** compared to **Q3 2013** (after specification) were higher by 0.1%, prices of construction material input increased by 0.5% quarter-on-quarter.

According to an estimate, **construction work** prices in **Q4 2013** compared to the **corresponding period of 2012 (after specification)** decreased by 0.8%, prices of construction material input increased by 0.5% y-o-y.

In comparison to Q3 2013, prices of **market services** increased by 1.0% in **Q4 2013**. Higher were especially prices of 'advertising and market research services' (+9.6%), prices of 'land transport services and transport services via pipelines' (+0.7%) and 'postal and courier services' (+2.4%). Prices of market services excluding advertising services went up by 0.3%.

In Q4 2013, prices of **market services** fell by 1.9% in total compared to **Q4 2012**. Price decreases were recorded for 'telecommunication services' (-21.0%), 'warehousing and support services for transportation' (-7.8%), and 'land transport services and transport services via pipelines' (-2.4%). Higher prices were in 'advertising and market research services' (+6.9%). Prices of market services excluding advertising services decreased by 2.4%.

Price trend in the year 2013

In comparison to 2012, **agricultural producer** prices in 2013 were higher by 4.5% (+3.8% in 2012) on average. Prices of crop and animal products grew by 5.1% and 3.8% respectively. Prices of cereals (+5.0%), fresh vegetables (+23.4%) and potatoes (+54.7%) were higher.

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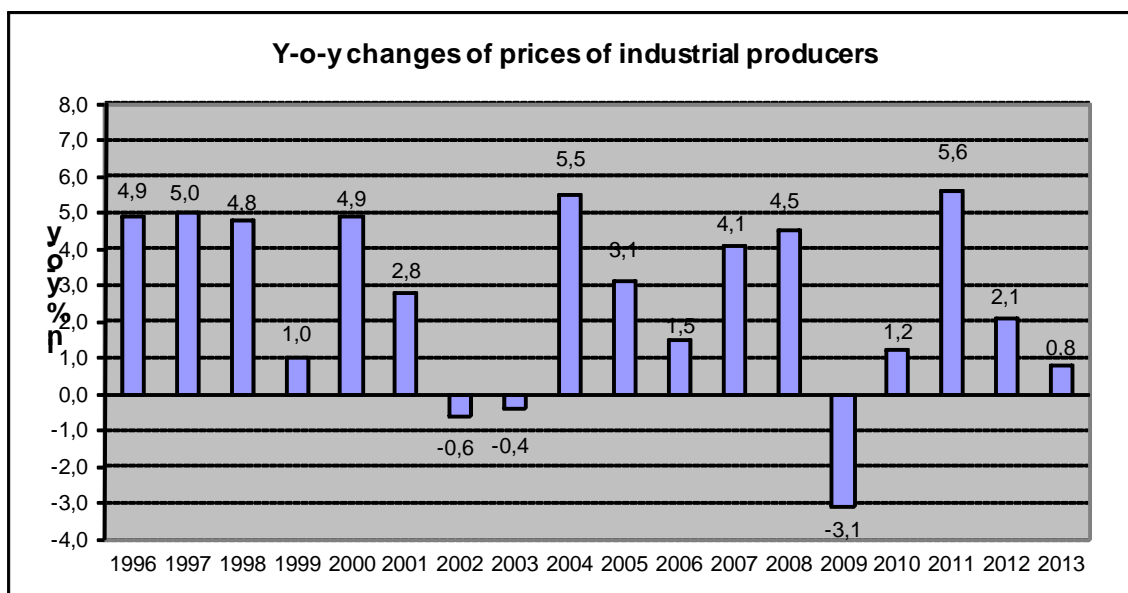
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Prices of oil plants fell by 1.1%. Among animal products price increases were recorded in milk (+7.8%), poultry (+7.1%) and pigs for slaughter (+2.6%). Prices of eggs decreased (-20.0%)

Compared with the year 2012, **industrial producer** prices rose by 0.8% in the year 2013 (+2.1% in the year 2012). Prices grew in 'water supply, sewerage, waste management and remediation services' (+5.7%) and 'electricity, gas, steam and air conditioning' (+3.6%). Prices rose in 'food products, beverages, tobacco' by 2.8% on average (in the individual quarters with the decreasing trend of growth: +4.0%, +3.7%, +3.4% and +0.2%), Prices grew in 'transport equipment' by 1.5% on average (the growth in the quarters: +0.8%, +0.6%, +1.2% and +3.5%, in the fourth quarter due to the weakening of the Czech crown against the euro). Prices went down in 'coke, refined petroleum products' (-4.4%), 'basic metals, fabricated metal products' (-1.5%) and 'mining and quarrying' (-1.3%).



Construction work prices in 2013 were lower by 1.1% y-o-y according to quarterly estimates (-0.7% in 2012 after specification) on average. Construction material input prices stayed unchanged (+1.0 in 2012).

Market services prices in 2013 in the business sphere were lower by 1.5% (-0.6% in 2012) on average. Price decreases were observed in 'telecommunication services' (-14.4%), 'warehousing and support services for transportation' (-7.2%), thereof 'storage' went down by 16.6% and 'land transport services and transport services via pipelines' (-2.4%). On the increase were prices in 'advertising and market research services' (+4.2%), 'postal and courier services' (+3.8%) and 'financial services, except insurance and pension funding' (+1.5%). Market services prices excluding advertising services were lower by 1.9% (-0.2% in 2012).

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Industrial producer price indices

Code	Name	Corresponding period of the previous year = 100				
		2013				
		Q3	October	November	December	Q4
	TOTAL	100,7	100,0	100,7	101,7	100,8
B	Mining and quarrying	98,0	97,0	100,2	100,3	99,2
C	Manufactured products	100,1	99,2	99,8	101,3	100,1
CA	Food products, beverages, tobacco	103,4	100,7	99,8	100,2	100,2
CB	Textiles, clothes, leather and leather products	99,5	100,6	100,7	100,1	100,4
CC	Wood, wood product, paper, printing	99,6	100,2	100,6	101,7	100,8
CD	Coke, refined petroleum products	96,2	91,5	94,4	102,0	95,9
CE	Chemicals and chemical products	100,7	96,9	95,9	99,0	97,3
CF	Basic pharmaceutical products	98,0	97,1	96,2	96,2	96,5
CG	Rubber and plastic products, other non-metallic min. products	99,1	100,2	100,6	101,0	100,6
CH	Basic metals, fabricated metal products	98,0	98,2	99,8	101,1	99,7
CI	Computer, electronic and optical products	98,9	99,0	100,7	102,0	100,6
CJ	Electrical equipments	99,6	99,0	99,9	100,9	99,9
CK	Machinery and equipment n.e.c.	100,3	100,0	100,4	100,7	100,4
CL	Transport equipment	101,2	101,7	103,7	105,1	103,5
CM	Furniture, other manufactured products	101,2	101,2	101,4	101,4	101,3
D	Electricity, gas, steam and air conditioning	103,6	103,8	103,8	103,5	103,7
E	Water supply, sewerage, waste manag. and remediation serv.	105,7	105,7	105,7	105,7	105,7

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