

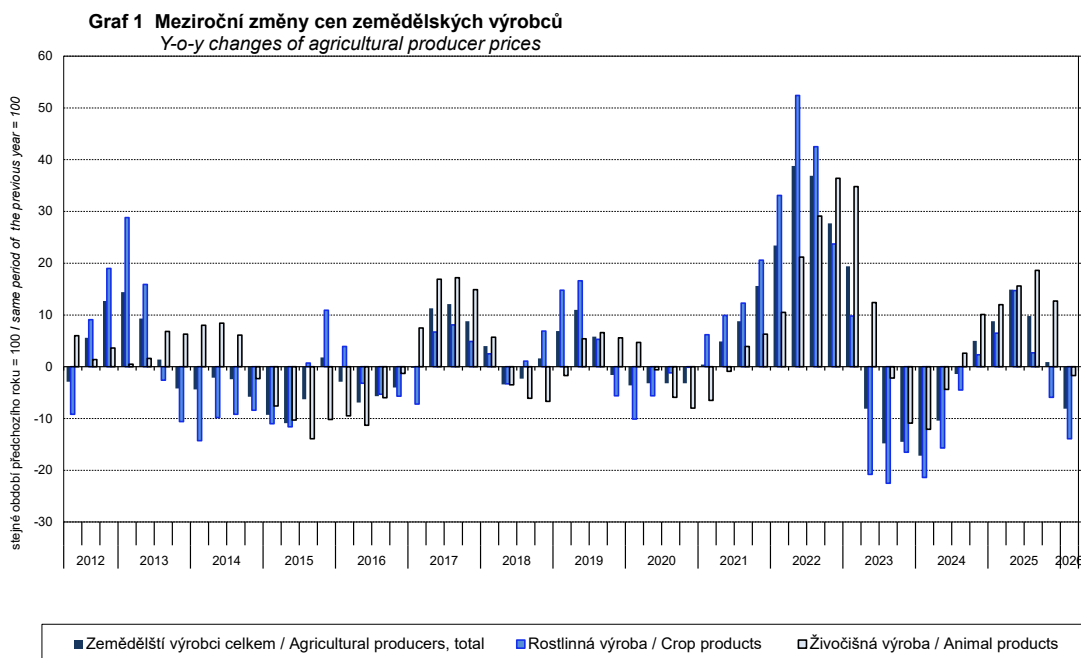
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20 April 2026

Trends in producer price indices in Q1 2026

In Q1 2026, compared to Q4 2025, agricultural producer prices went down by 6.2%, and were lower by 8.1% year-on-year (y-o-y) in Q1 2026. In Q1 2026, compared to Q4 2025, industrial producer prices fell by 0.2%. In Q1 2026, industrial producer prices dropped by 2.3% y-o-y. Construction work prices rose by 0.9% in Q1 2026 compared to Q4 2025 and were higher by 2.7% y-o-y in Q1 2026. Service producer prices in the business sphere grew by 0.2% in Q1 2026 compared to Q4 2025 and went up by 3.5% y-o-y in Q1 2026.

In Q1 2026, compared to Q4 2025, agricultural producer prices were lower by 6.2%. Falling were prices of milk (-14.7%), pigs for slaughter decreased (-12.3%), cereals (-3.3%) and poultry (-0.4%). Growth was recorded in prices of eggs (+4.7%), oilseeds (+0.9%), vegetables (+0.8%) and cattle for slaughter (+0.7%). **Agricultural producer prices** decreased by 8.1%, y-o-y, in Q1 2026. Prices in crop production fell by 13.9% due to lower prices of fruit (-36.7%), potatoes (-23.8%), vegetables (-23.5%), cereals (-14.6%) and oilseeds (-9.6%). Prices in animal production dropped by 1.7%. Prices decreased for prices of pigs for slaughter (-17.8%) and milk (-11.4%). Prices of cattle for slaughter (+30.5%), eggs (+21.2%) and poultry (+9.3%) rose.



In Q1 2026, compared to Q4 2025, industrial producer prices were lower by 0.2%. Prices fell in 'electricity, gas, steam and air conditioning' (-3.5%) and 'food products' (-2.6%). Thereof, price were lower in 'dairy products' (-8.3%) and 'preserved meat and meat products' (-2.6%). Prices rose in 'water supply, sewerage, waste management, remediation services' (+3.9%), 'wood and

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of products of wood and cork, except furniture' (+3.0%) and 'printing and recording services' (+2.6%).

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

Kód	Název	2025			2026	Name
		Q2	Q3	Q4	Q1	
	ÚHRN	98,5	99,6	99,8	99,8	TOTAL
B	Těžba a dobývání	99,5	99,6	99,6	100,3	Mining and quarrying
C	Výrobky a služby zpracovatelského průmyslu	99,5	99,6	99,4	100,6	Manufactured products
D	Elektrina, plyn, pára a klimatizovaný vzduch	94,9	99,3	101,2	96,5	Electricity, gas, steam and air conditioning
E	Zásobování vodou; služby související s odpadními vodami	100,0	100,0	100,0	103,9	Water supply, sewerage, waste manag., remed. services

In Q1 2026, industrial producer prices were lower by 2.3% y-o-y (-1.5% in Q4 2025). Prices went down in 'chemicals and chemical products' (-9.1%) and 'electricity, gas, steam and air conditioning' (-7.9%). Prices fell in 'food products' (-2.4%), thereof 'dairy products' (-11.5%). Prices were higher in 'processed and preserved fruit and vegetables' (+1.2%). Prices rose in 'wood and products of wood and cork, except furniture' (+10.0%), 'water supply, sewerage, waste management, remediation services' and 'repair and installation services of machinery and equipment' and 'printing and recording services' (+3.9% all).

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

Kód	Název	2025	2026			Q1	Name
		Q4	leden January	únor February	březen March		
	ÚHRN	98,5	97,0	97,1	98,9	97,7	TOTAL
B	Těžba a dobývání	95,8	98,1	98,5	100,4	99,0	Mining and quarrying
C	Výrobky a služby zpracovatelského průmyslu	99,1	98,2	98,3	101,2	99,2	Manufactured products
D	Elektrina, plyn, pára a klimatizovaný vzduch	96,2	92,6	92,9	90,8	92,1	Electricity, gas, steam and air conditioning
E	Zásobování vodou; služby související s odpadními vodami	104,1	103,9	103,9	103,9	103,9	Water supply, sewerage, waste manag., remed. services

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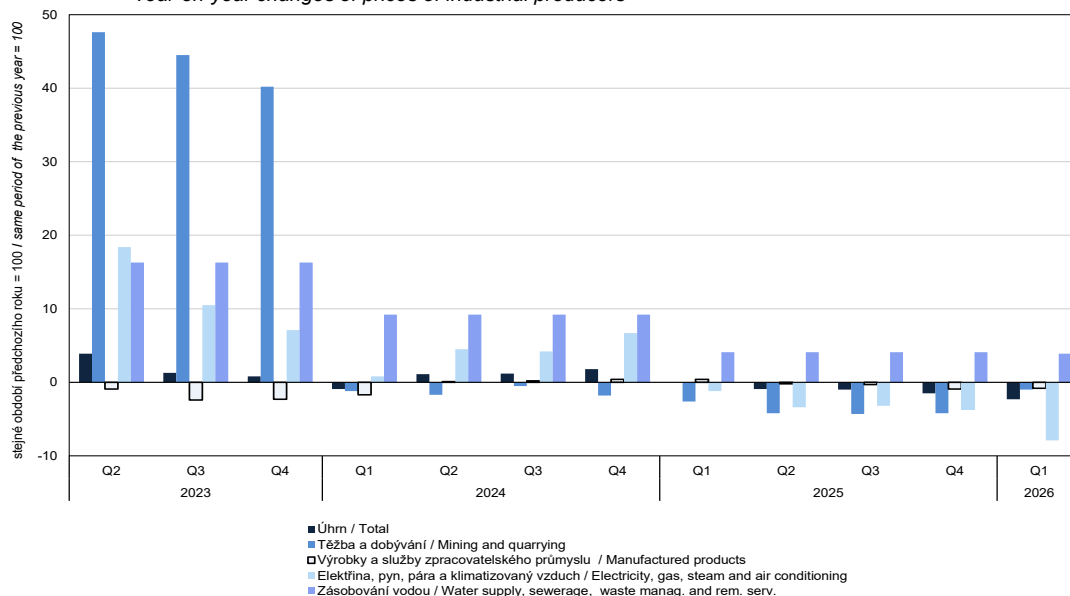
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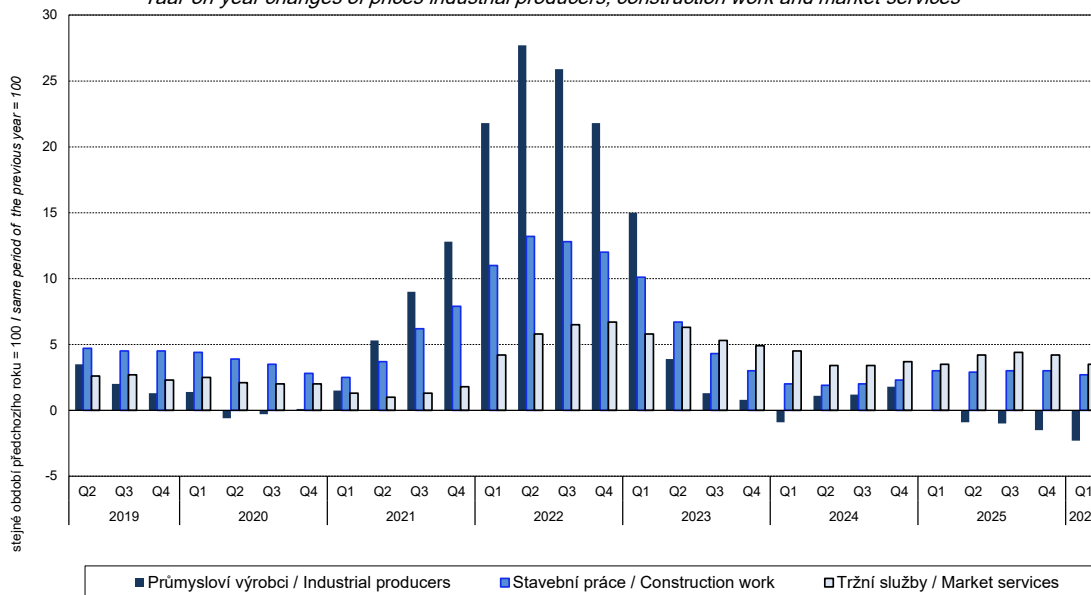
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Graf 2 Meziroční změny cen průmyslových výrobců
Year-on-year changes of prices of industrial producers



In **Q1 2026**, according to the estimate, **construction work prices** compared to **Q4 2025** (after updating) were higher by 0.9%. Prices of construction materials and products input rose by 1.5%. **Construction work prices**, as estimated, grew by 2.7% in **Q1 2026** compared to **Q1 2025** (after updating). Prices of construction materials and products input increased by 2.1%, **y-o-y**.

Graf 3 Meziroční změny cen výrobců
Year-on-year changes of prices industrial producers, construction work and market services



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In **Q1 2026**, compared to **Q4 2025**, **service producer prices in the business sphere** rose by 0.2%. On the increase were prices in 'security and investigation services' (+4.3%), 'motion picture, video and television programme production services, sound recording and music publishing' (+3.6%), 'information services' (+2.9%) and 'warehousing and support services for transportation' (+1.5%). Decreasing were prices of 'advertising and market research services' (-10.1%) and 'programming and broadcasting services' (-13.5%). Service producer prices in the business sphere, excluding advertising services, went up by 1.3%. **Service producer prices in the business sphere** grew in total by 3.5%, **y-o-y**, in **Q1 2026**. Prices in 'advertising and market research services' (+19.4%), 'programming and broadcasting services' (+13.4%), 'motion picture, video and television programme production services, sound recording and music publishing' (+7.0%), 'employment services' (+8.1%) and 'security and investigation services' (+6.9%) were higher. Service producer prices in the business sphere, excluding advertising services, grew by 2.4%.

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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