

ANALYSIS

19 January 2026

Trends in producer price indices in Q4 2025 and in the year 2025

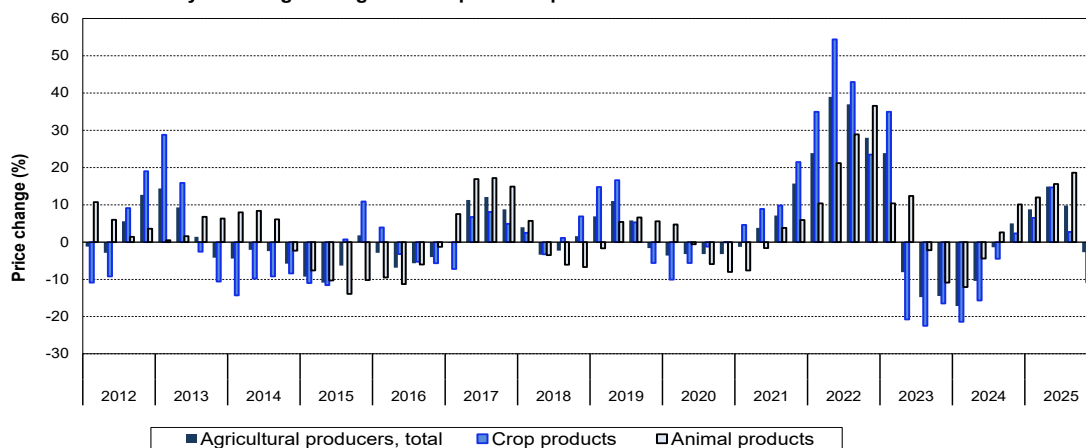
In Q4 2025, compared to Q3 2025, agricultural producer prices went down by 1.8%. Year-on-year (y-o-y) they grew by 5.0% in Q4 2025. Industrial producer prices decreased by 0.2% in Q4 2025 compared to Q3 2025. Y-o-y they were lower by 1.5% in Q4 2025. Construction work prices increased by 0.7% in Q4 2025 compared to Q3 2025. Y-o-y they rose by 3.1% in Q4 2025. Service producer prices in the business sphere grew by 1.4% in Q4 2025 compared to Q3 2025. Y-o-y they went up by 4.2% in Q4 2025.

Compared to 2024, on average for the whole year 2025, agricultural producer prices (+7.9%), construction work prices (+3.0%) and service producer prices in the business sphere (+4.1%) went up, while industrial producer prices decreased (-0.8%).

In Q4 2025, compared to Q3 2025, agricultural producer prices were lower by 1.8%. Decrease was recorded for prices of pigs for slaughter (-11.8%), vegetables (-11.5%), cereals (-7.1%), oilseeds (-3.4%) and milk (-0.3%). Rising were prices of eggs (+19.5%), cattle for slaughter (+3.2%) and poultry (+2.8%). **Agricultural producer prices** increased by 0.9%, **y-o-y**, in **Q4 2025**. Prices in crop production dropped by 5.9% due to lower prices of fruit (-19.3%), potatoes (-18.3%), vegetables (-17.7%), cereals (-7.0%) and oilseeds (-2.2%). In animal production, prices were higher by 12.7%. Increase occurred in prices of cattle for slaughter (+39.8%), eggs (+35.4%), poultry (+11.9%) and milk (+10.3%). The decrease was in prices of pigs for slaughter (-13.1%).

Compared to 2024, on average for the whole year 2025, agricultural producer prices grew by 7.9% (-5.9% in 2024). Prices in crop production rose by 3.0% and prices for animal production by 14.7%. Rising were prices of oilseeds (+13.2%), cereals (+5.2%) and fruit (+3.8%). Prices of potatoes (-20.1%) and vegetables (-10.8%) dropped. In animal production, prices of eggs (+36.0%), cattle for slaughter (+32.0%), milk (+16.8%) and poultry (+8.0%) grew, while prices of pigs for slaughter declined (-9.8%).

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



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In **Q4 2025**, compared to Q3 2025, **industrial producer prices** were lower by 0.2%. Prices fell in 'crude petroleum and natural gas' (-4.2%), 'chemicals and chemical products' (-2.0%) and 'food products' and 'paper and paper products' (-1.4% both). Higher were prices in 'wood and products of wood and cork, except furniture' (+2.9%), 'printing and recording services' (+1.9%) and 'electricity, gas, steam and air conditioning' (+1.2%).

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

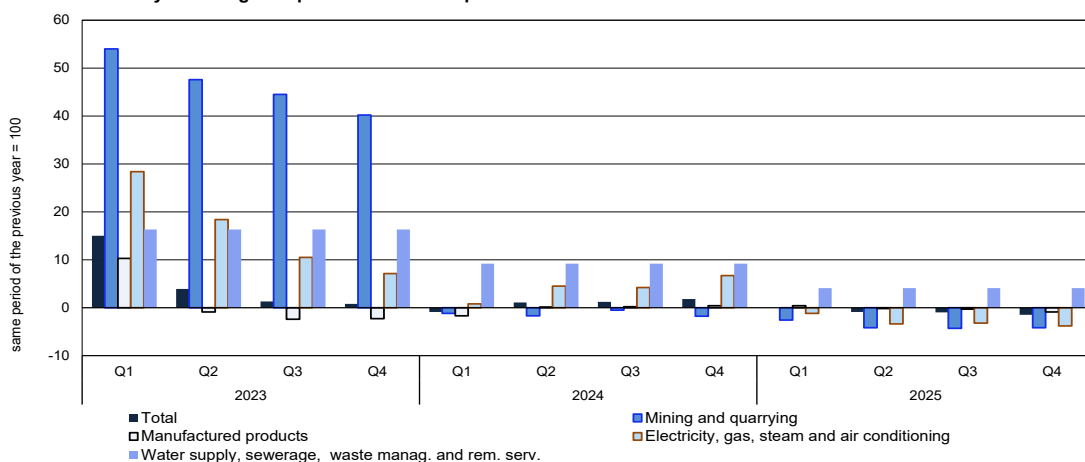
Code	Name	Year			
		2025			
		Q1	Q2	Q3	Q4
	TOTAL	100,6	98,5	99,6	99,8
B	Mining and quarrying	97,1	99,5	99,6	99,6
C	Manufactured products	100,6	99,5	99,6	99,4
D	Electricity, gas, steam and air conditioning	100,8	94,9	99,3	101,2
E	Water supply, sewerage, waste manag. and rem. serv.	104,1	100,0	100,0	100,0

In **Q4 2025**, **industrial producer prices** were lower by 1.5% **y-o-y** (-1.0% in Q3 2025). Prices decreased considerably in 'crude petroleum and natural gas' (-15.0%). Prices fell in 'coal and lignite' (-10.0%) and 'chemicals and chemical products' (-8.1%). Prices grew in 'wood and products of wood and cork, except furniture' (+7.5%), 'other mining and quarrying products' (+5.2%) and 'other transport equipment' (+4.2%).

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

Code	Name	Year				
		2025				
		Q3	October	November	December	Q4
	TOTAL	99,0	98,8	98,7	97,9	98,5
B	Mining and quarrying	95,7	95,9	95,9	95,8	95,8
C	Manufactured products	99,7	99,3	99,2	98,9	99,1
D	Electricity, gas, steam and air conditioning	96,8	97,4	96,8	94,4	96,2
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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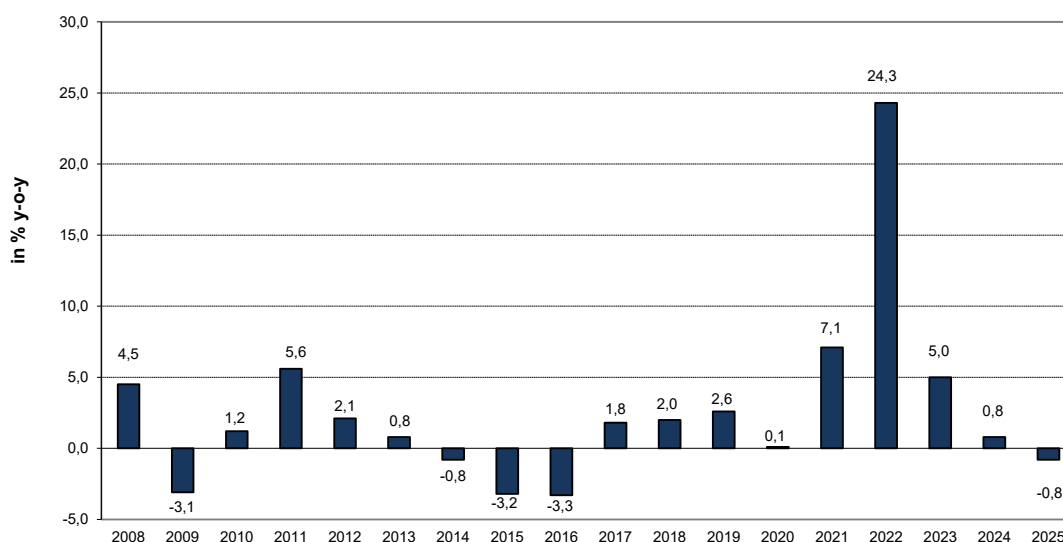
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Prices of **industrial producers** decreased on average by 0.8% in 2025 y-o-y (+0.8% in 2024). Prices fell in 'crude petroleum and natural gas' (-15.5%), 'coal and lignite' (-9.6%) and 'chemicals and chemical products' (-5.6%). On the increase were prices in 'other mining and quarrying products' (+5.8%), 'wood and products of wood and cork, except furniture' (+4.8%) and 'repair and installation services of machinery and equipment' and 'natural water; water treatment and supply services' (+4.1% both). Prices rose in 'food products' (+2.6%), thereof 'dairy products' (+8.3%), 'prepared animal feeds' (+4.0%) and 'vegetable and animal oils and fats' (+6.4%). Lower were prices in 'other food products' (-2.7%) and 'grain mill products, starches and starch products' (-0.7%).

Chart 3 Y-o-y changes of prices of industrial producers



In **Q4 2025**, as estimated, **construction work prices** compared to **Q3 2025** (after updating) were higher by 0.7%. Prices of construction material and products input went up by 0.3%. **Construction work prices**, according to the estimate, grew by 3.1%, **y-o-y**, in **Q4 2025** compared to **Q4 2024** (after updating). Prices of construction material and products input rose by 1.2%, y-o-y.

Compared to 2024, on average for the whole year **2025**, **construction work prices**, as estimated, grew by 3.0% (+2.0% in 2024 after updating). Prices of construction material and products input increased by 1.0% on average for the whole year 2025 (-0.5% in 2024).

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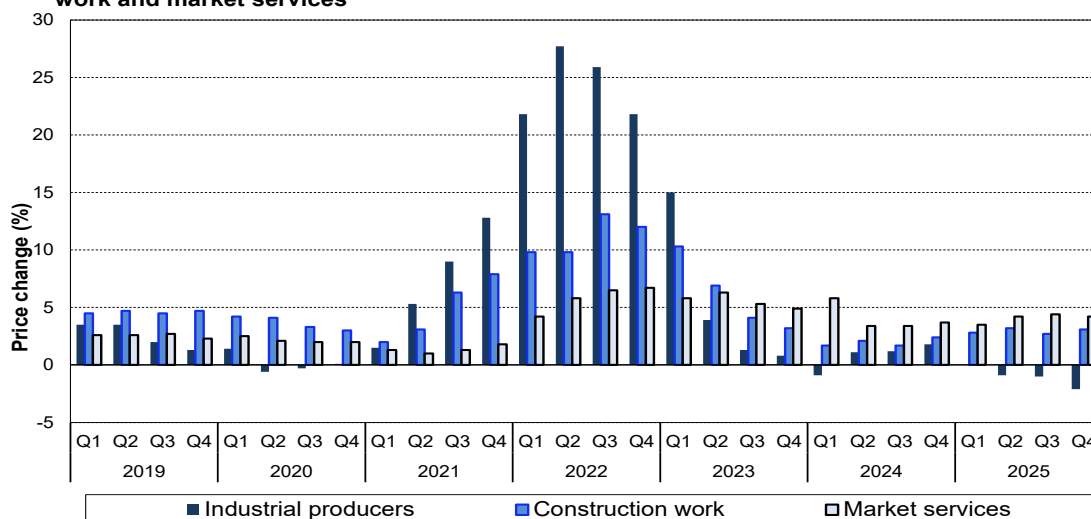
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Chart 4 Year-on-year changes of prices industrial producers, construction work and market services



In **Q4 2025**, compared to **Q3 2025**, **service producer prices in the business sphere** grew by 1.4%. Increasing were prices in ‘advertising and market research services’ (+17.1%), ‘programming and broadcasting services’ (+13.7%), ‘information services’ (+1.3%) and ‘publishing services’ (+1.1%). Service producer prices in the business sphere, excluding advertising services, went up by 0.1%. In **Q4 2025**, compared to **Q4 2024**, **service producer prices in the business sphere** rose in total by 4.2%. Prices increased for ‘advertising and market research’ (+16.7%), ‘programming and broadcasting services’ (+15.2%), ‘security and investigation services’ (+12.0%) and ‘employment services’ (+8.9%). Service producer prices in the business sphere, excluding advertising services, were higher by 3.1%.

Compared to 2024, on average for the whole year 2025, service producer prices in the business sphere increased by 4.1% (+3.8% in 2024). Prices were higher for ‘programming and broadcasting services’ (+16.1%), ‘advertising and market research services’ (+13.9%), ‘security and investigation services’ (+11.7%), ‘employment services’ (+9.2%), ‘warehousing and support services for transportation’ (+6.1%), ‘publishing services’ (+5.1%), ‘insurance, reinsurance and pension funding services, except compulsory social security’ (+4.5%), ‘postal and courier services’ (+4.3%) and ‘real estate services’ (+3.9%). Prices of ‘land transport services’ did not change. Service producer prices in the business sphere, excluding advertising services, increased by 3.3% (same as in 2024).

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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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