

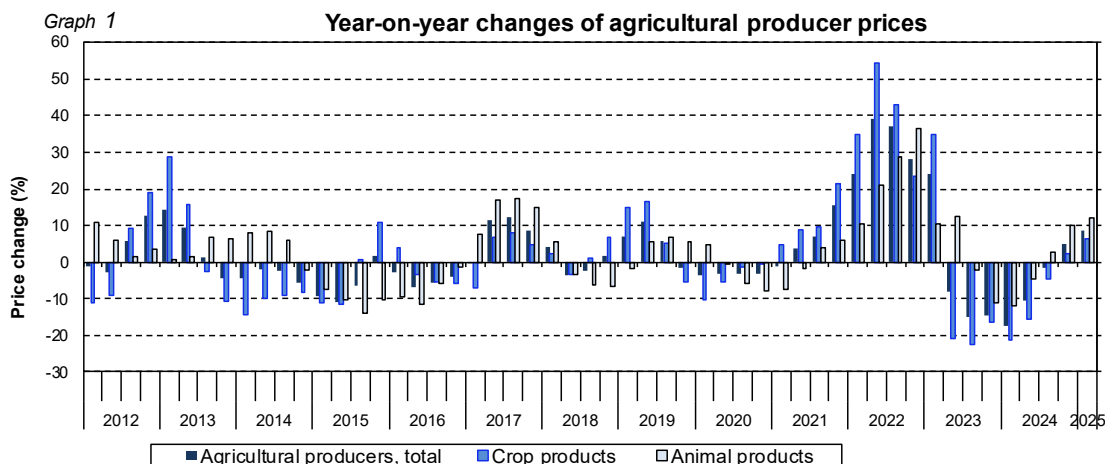
## ANALYSIS

16 April 2025

### Trends in producer price indices in Q1 2025

In Q1 2025, compared to Q4 2024, agricultural producer prices went up by 3.0%, and were higher by 8.8% year-on-year (y-o-y) in Q1 2025. In Q1 2025, compared to Q4 2024, industrial producer prices were higher by 0.6 %. In Q1 2025, industrial producer prices remained stable, year-on-year. Construction work prices rose by 1.0% in Q1 2025 compared to Q4 2024, and were 2.8% higher y-o-y in Q1 2025. Service producer prices in the business sphere grew by 0.9% in Q1 2025 compared to Q4 2024, and were 3.5% higher y-o-y in Q1 2025.

In Q1 2025, compared to Q4 2024, **agricultural producer prices** were higher by 3.0%. Rising were prices of eggs (+16.9%), fruit (+9.3%), oilseeds (+9.2%), vegetables (+8.6%), cattle for slaughter (+7.8%), milk (+6.3%), cereals (+5.2%) and poultry (+2.0%). Prices of pigs for slaughter decreased (-7.3%). **Agricultural producer prices** increased by 8.8%, **y-o-y**, in Q1 2025. Prices in crop production grew by 6.5% due to higher prices of fruit (+25.6%), oilseeds (+25.0%) and cereals (+9.5%). Prices of vegetables (-13.3%) and potatoes (-18.3%) went down. Prices in animal production increased by 12.0%. Prices of eggs (+25.1%), cattle for slaughter (+20.1%), milk (+17.9%) and poultry (+2.6%) rose. Prices of pigs for slaughter were lower by 11.1%.



In Q1 2025, compared to Q4 2024, **industrial producer prices** were higher by 0.6%. Prices grew in 'natural water; water treatment and supply services' (+4.1%), 'other mining and quarrying products' (+3.1%), 'wearing apparel' (+3.0%), 'other transport equipment' (+2.9%) and 'electricity, gas, steam and air conditioning' (+0.8%). On the increase were also prices in 'food products' (+1.1%). Prices fell in 'coal and lignite' (-7.3%), 'crude oil and natural gas' (-3.4%), 'basic metals' and 'paper and paper products' (-1.8% both) and 'printing and recording services' (-1.1%).

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

Code	Name	Year			
		2024			2025
		Q2	Q3	Q4	Q1
	TOTAL	99,5	99,6	100,3	100,6
B	Mining and quarrying	101,2	99,7	99,5	97,1
C	Manufactured products	100,2	99,7	100,0	100,6
D	Electricity, gas, steam and air conditioning	97,1	99,2	101,9	100,8
E	Water supply, sewerage, waste manag. and rem. serv.	100,0	100,0	100,0	104,1

**In Q1 2025, industrial producer prices** stayed unchanged **y-o-y** (in Q4 2024 they rose by 1.8%). Prices increased in 'other mining and quarrying products' (+6.1%), 'natural water; water treatment and supply services' (+4.1%) and 'food products' (+2.2%), thereof 'dairy products' (+12.4%) and 'vegetable and animal oils and fats' (+7.1%). Lower prices were recorded in 'coke, refined petroleum products'. On the decrease were prices in 'crude petroleum and natural gas' (-14.9%), 'coal and ignite' (-6.3%), 'basic metals' (-2.5%) and 'electricity, gas, steam and air conditioning' (-1.2%).

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

Code	Name	Year				
		2024	2025			
		Q4	January	February	March	Q1
	TOTAL	101,8	100,5	99,9	99,7	100,0
B	Mining and quarrying	98,2	99,2	97,2	96,0	97,4
C	Manufactured products	100,4	101,3	100,4	99,6	100,4
D	Electricity, gas, steam and air conditioning	106,7	98,0	98,4	100,0	98,8
E	Water supply, sewerage, waste manag. and remediation serv.	109,2	104,1	104,1	104,1	104,1

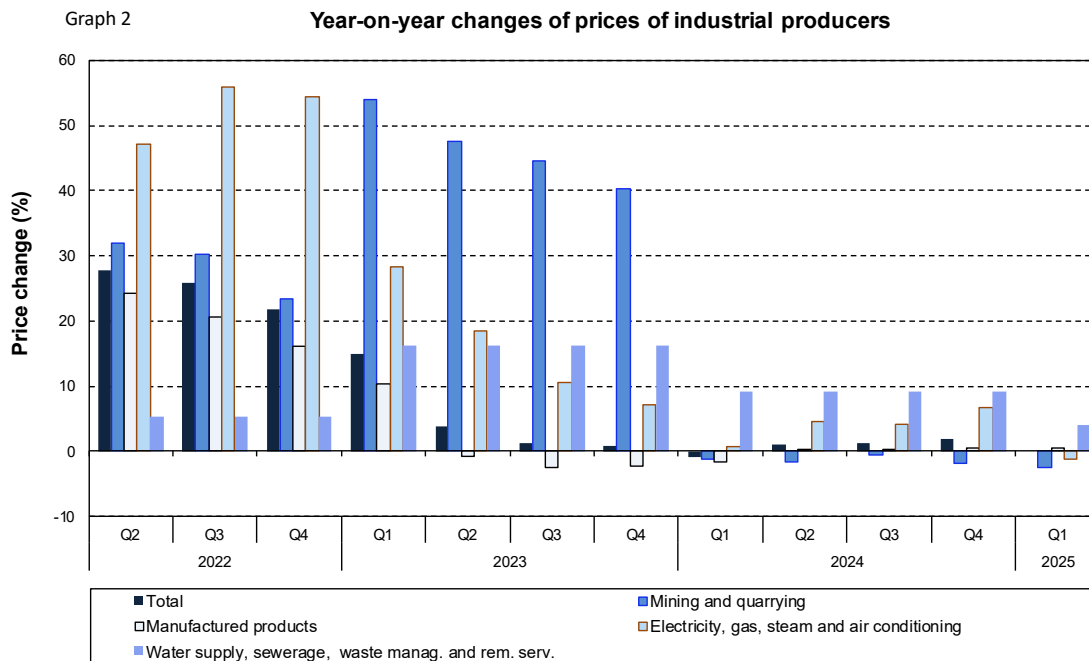
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In **Q1 2025**, according to the estimate, **construction work prices** compared to **Q4 2024** (after updating) were higher by 1.0%. Prices of construction materials and products input rose by 0.6%. **Construction work prices**, as estimated, grew by 2.8% in **Q1 2025** compared to **Q1 2024** (after updating). Prices of construction materials and products input increased by 0.7%, **y-o-y**.

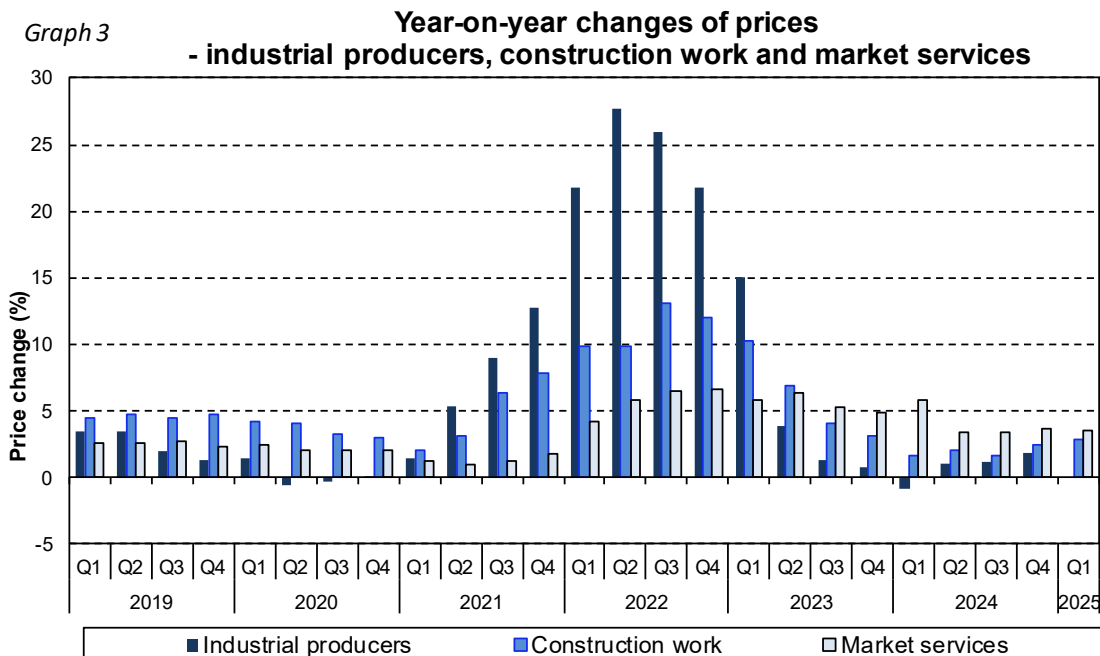
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In **Q1 2025**, compared to **Q4 2024**, **service producer prices in the business sphere** rose by 0.9%. On the increase were prices in 'security and investigation services' (+9.3%), 'postal and courier services' (+3.0%), 'publishing services' (+2.8%) and 'employment services' (+2.3%). Decreasing were prices of 'programming and broadcasting services' and 'advertising and market research services' (-12.1% both). Service producer prices in the business sphere, excluding advertising services, went up by 1.9%. **Service producer prices in the business sphere** grew in total by 3.5%, **y-o-y**, in **Q1 2025**. Prices in 'security and investigation services' (+10.0%), 'employment services' (+8.6%), 'advertising and market research services' (+5.2%) and 'real estate services' (+5.1%) were higher. 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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