

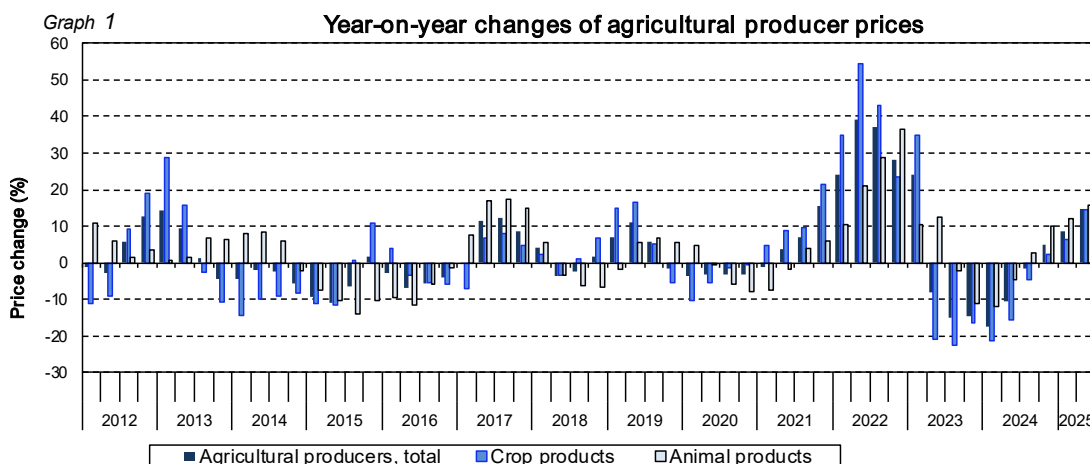
## ANALYSIS

16 July 2025

### Trends in producer price indices in Q2 2025

In Q2 2025, compared to Q1 2025, agricultural producer prices went up by 3.9%, and were higher by 14.9% year-on-year (y-o-y) in Q2 2025. In Q2 2025, compared to Q1 2025, industrial producer prices were lower by 1.5 %, and fell by 0.9% y-o-y in Q2 2025. Construction work prices rose by 0.8% in Q2 2025 compared to Q1 2025, and were 3.2% higher y-o-y in Q2 2025. Service producer prices in the business sphere grew by 2.3% in Q2 2025 compared to Q1 2025, and were 4.2% higher y-o-y in Q2 2025.

In Q2 2025, compared to Q1 2025, **agricultural producer prices** were higher by 3.9%. Rising were prices of cattle for slaughter (+13.0%), eggs (+7.9%), pigs for slaughter (+4.5%), poultry (+3.6%) and cereals (+2.1%). Prices of oilseeds and milk grew equally (+2.8%). **Agricultural producer prices** increased by 14.9%, **y-o-y**, in Q2 2025. Prices in crop production grew by 14.7% due to higher prices of fruit (+28.3%), oilseeds (+24.3%), cereals (+14.9%) and fresh vegetables (+6.9%). Prices of potatoes went down (-23.8%). Prices in animal production increased by 15.6%. Prices of eggs (+41.8%), cattle for slaughter (+28.0%), milk (+19.7%) and poultry (+6.0%) rose. Prices of pigs for slaughter were lower by 9.8%.



In Q2 2025, compared to Q1 2025, **industrial producer prices** were lower by 1.5%. Prices fell primarily in 'coke, refined petroleum products'. Prices decreased in 'crude petroleum and natural gas' (-6.6%), 'electricity, gas, steam and air conditioning' (-5.1%) and 'chemicals and chemical products' (-4.2%). On the increase were prices in 'wood and of products of wood and cork, except furniture' (-3.2%) and 'other mining and quarrying products' (+1.6%). Prices rose in food products' and 'rubber and plastic products' (+1.2% both).

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## ANALYSIS

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

Code	Name	Year			
		2024		2025	
		Q3	Q4	Q1	Q2
	TOTAL	99,6	100,3	100,6	98,5
B	Mining and quarrying	99,7	99,5	97,1	99,5
C	Manufactured products	99,7	100,0	100,6	99,5
D	Electricity, gas, steam and air conditioning	99,2	101,9	100,8	94,9
E	Water supply, sewerage, waste manag. and rem. serv.	100,0	100,0	104,1	100,0

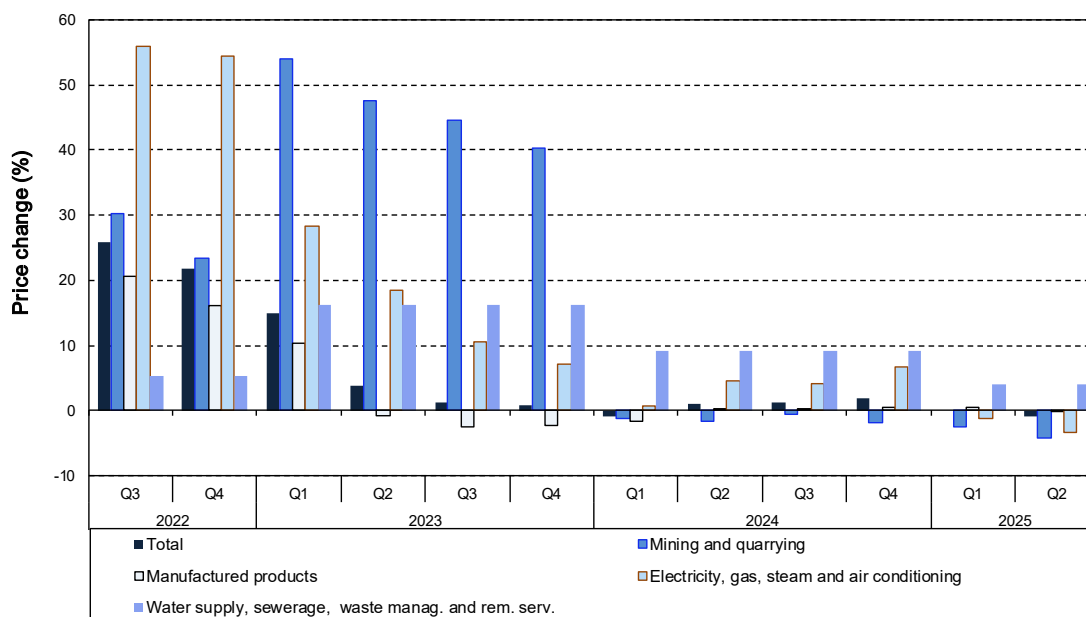
In **Q2 2025**, industrial producer prices were lower by 0.9% **y-o-y** (in Q1 2025 they stayed unchanged). Prices decreased markedly in 'coke, refined petroleum products'. Lower were prices in 'crude petroleum and natural gas' (-16.8%), 'coal and lignite' (-10.4%) and 'chemicals and chemical products' (+7.1%). Prices grew in 'other mining and quarrying products' (+6.2%), 'wood and of products of wood and cork, except furniture' (+4.9%) and 'wearing apparel' (+4.7%).

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

Code	Name	Year				
		2025				
		Q1	April	May	June	Q2
	TOTAL	100,0	98,7	99,2	99,3	99,1
B	Mining and quarrying	97,4	95,5	95,8	96,1	95,8
C	Manufactured products	100,4	99,1	100,0	100,3	99,8
D	Electricity, gas, steam and air conditioning	98,8	97,1	96,5	96,3	96,6
E	Water supply, sewerage, waste manag. and remediation serv.	104,1	104,1	104,1	104,1	104,1

Graph 2

**Year-on-year changes of prices of industrial producers**



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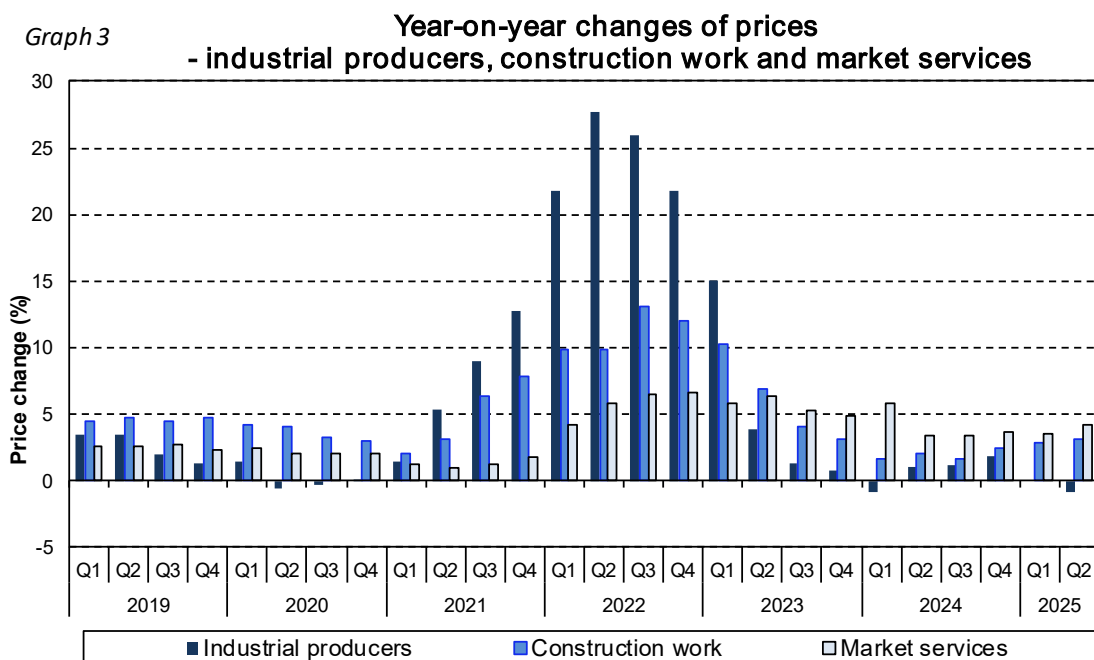
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In **Q2 2025**, according to the estimate, **construction work prices** compared to **Q1 2025** (after updating) were higher by 0.8%. Prices of construction materials and products input rose by 0.5%. **Construction work prices**, as estimated, grew by 3.2% in **Q2 2025** compared to **Q2 2024** (after updating). Prices of construction materials and products input increased by 0.9%, **y-o-y**.



In **Q2 2025**, compared to **Q1 2025**, **service producer prices in the business sphere** rose by 2.3%. On the increase were prices in 'programming and broadcasting services' (+23.6%), 'advertising and market research services' (+21.4%), 'employment services' (+5.2%), 'motion picture, video and television programme production services, sound recording and music publishing' (+4.8%) and 'security and investigation services' (+2.4%). Service producer prices in the business sphere, excluding advertising services, went up by 0.9%. **Service producer prices in the business sphere** grew in total by 4.2%, **y-o-y**, in **Q2 2025**. Prices in 'programming and broadcasting services' (+18.8%), 'advertising and market research services' (+14.8%), 'security and investigation services' (+12.5%) and 'employment services' (+10.1%) 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.*

### Contact person

Ing. Miloslav Beránek  
Industrial and International Trade Prices Statistics Unit  
E-mail: [miloslav.beranek@csu.gov.cz](mailto:miloslav.beranek@csu.gov.cz)  
Phone: (+420) 274 052 665

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