

Consumer price indices in Q2 2010

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Consumer price indices in Q2 2010

Consumer prices increased in **Q2 2010 compared with Q1 2010** by 0.6%. The consumer price growth was contributed to primarily by raising prices in 'alcoholic beverages, tobacco', where an excise tax increase since January 2010 was shown with a delay. In 'clothing and footwear', the quarter-on-quarter rise in prices was caused by a smaller range of sales campaigns. In 'housing, water, electricity, gas and other fuels', prices of natural gas went up (they were increased in October 2008 for the last time). In 'health', prices and additional payments for medical products increased, particularly in April and May. In 'transport', the rise in prices of automotive fuel continued, even though with a more moderate rate.

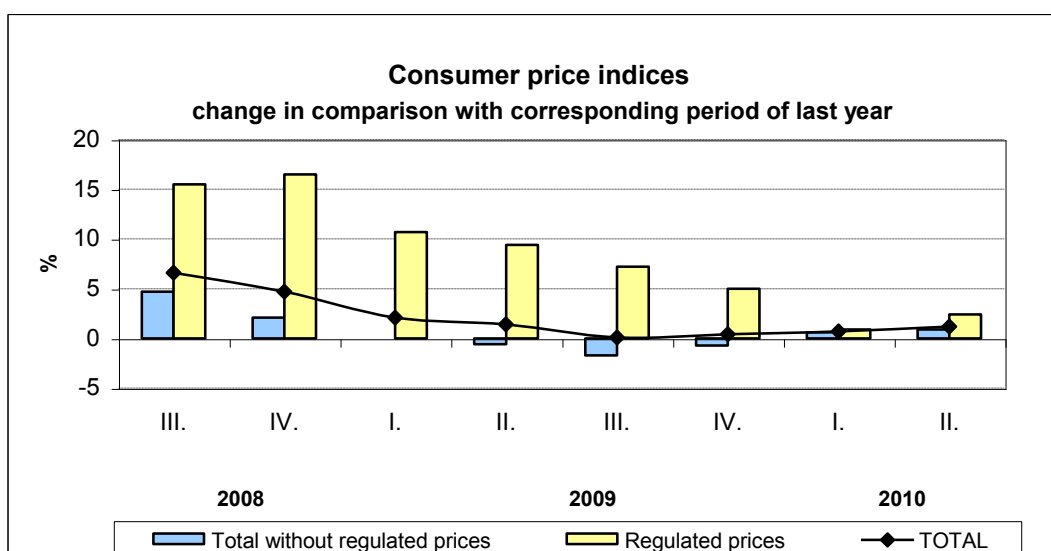
Prices were lower compared with Q1 2010 primarily in 'recreation and culture' due to a permanent drop in prices of audio-visual, photographic and information processing equipment. In 'communications', a decrease in prices of mobile phones and telephone and telefax services continued similarly.

The average m-o-m growth rate in Q2 2010 was 0.1%, while in Q2 2009 it made up 0.0%.

Consumer price indices previous quarter =100

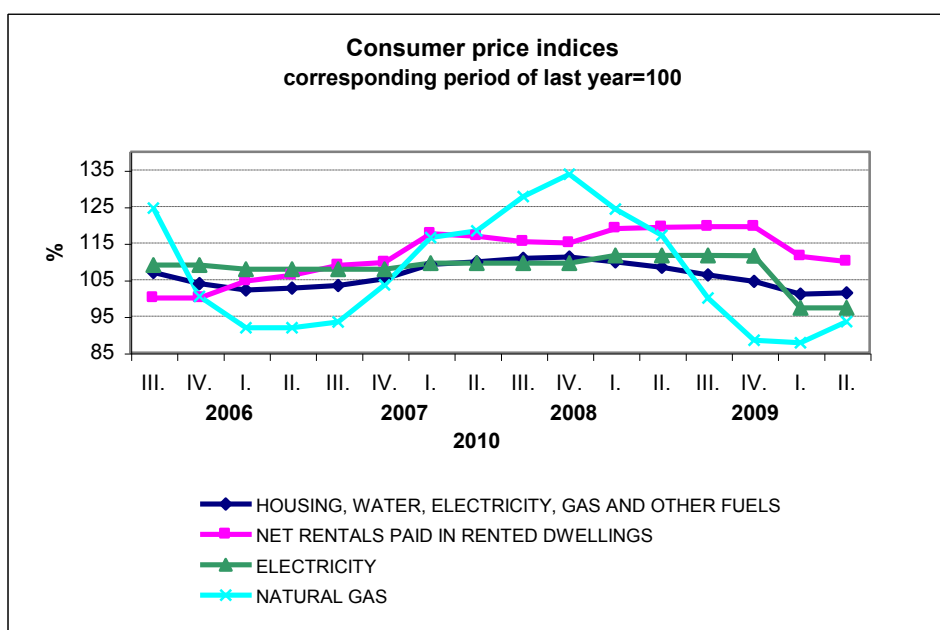
DIVISION	2009			2010	
	Q2	Q3	Q4	Q1	Q2
TOTAL	100.1	99.4	99.7	101.5	100.6
Food and non-alcoholic beverages	98.2	96.0	99.8	103.7	100.6
Alcoholic beverages and tobacco	100.8	100.0	100.5	102.5	101.2
Clothing and footwear	100.7	96.8	103.2	96.6	101.5
Housing, water, electricity, gas and other fuels	100.1	99.8	99.8	101.5	100.4
Furnishings, household equipment, repairs	100.0	99.4	99.8	100.2	100.0
Health	96.4	100.4	100.4	103.0	102.6
Transport	103.3	101.4	99.2	101.0	101.6
Communications	99.6	97.9	99.3	100.3	99.6
Recreation and culture	99.5	101.9	96.7	100.8	99.6
Education	100.0	100.4	100.9	100.1	100.0
Restaurants and hotels	100.5	100.3	100.2	101.4	100.7
Miscellaneous goods and services	100.3	100.5	99.9	100.5	99.9

In **Q2 2010 compared to Q2 2009** consumer prices raised by 1.2%, y-o-y, which is by 0.5 p.p. more than in Q1 2010. This acceleration was contributed to mainly by the price development in 'alcoholic beverages, tobacco', 'housing, water, electricity, gas and other fuels', 'health' and 'food and non-alcoholic beverages'. The growth of market prices accelerated to 0.9% (from 0.6% in Q1) and administrative prices to 2.4% (from 0.9% in Q1).



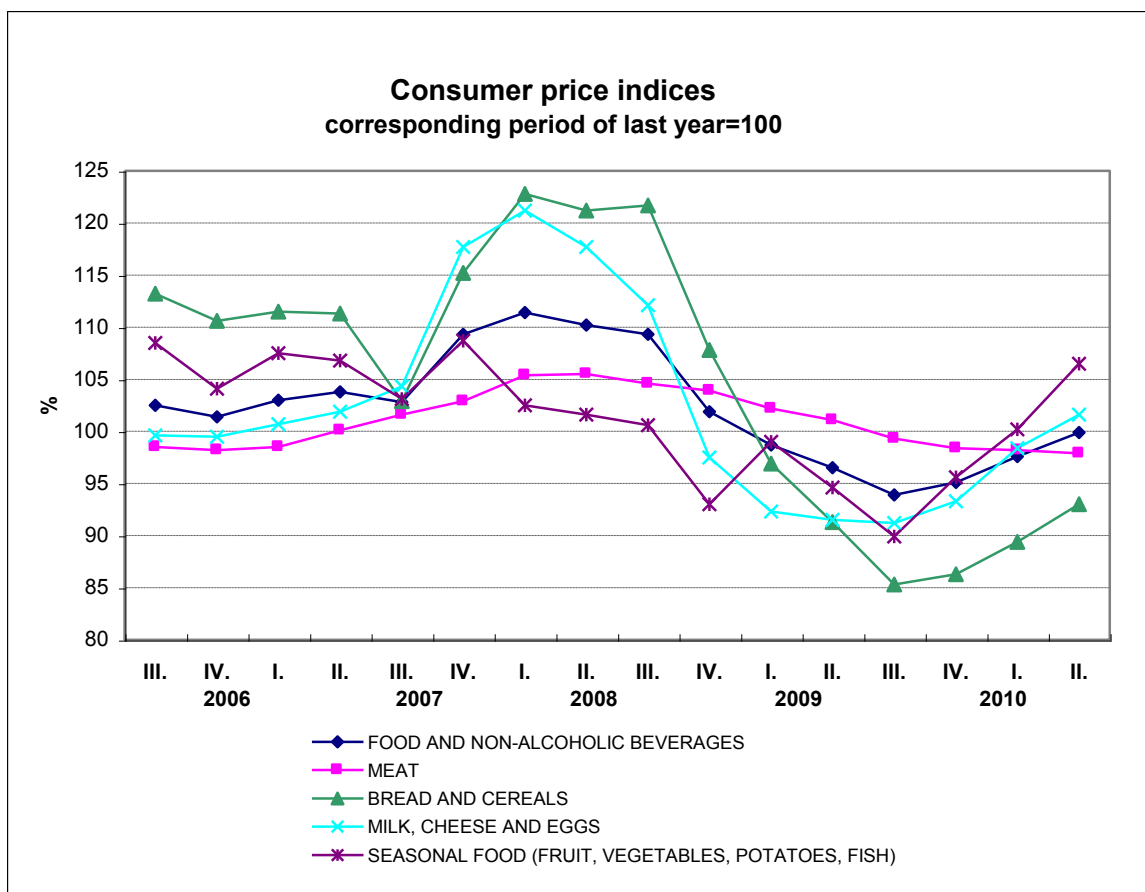
In **'alcoholic beverages, tobacco'** prices of tobacco products grew due to higher excise tax and partly to the market by 3.7% from 2.4% in Q1.

An acceleration of the price growth in **'housing, water, electricity, gas and other fuels'** was due to higher prices of natural gas since April 2010 by 3.3%. This slowed down the y-o-y drop to -6.5% (in Q1 2010 a decrease -12.3%).

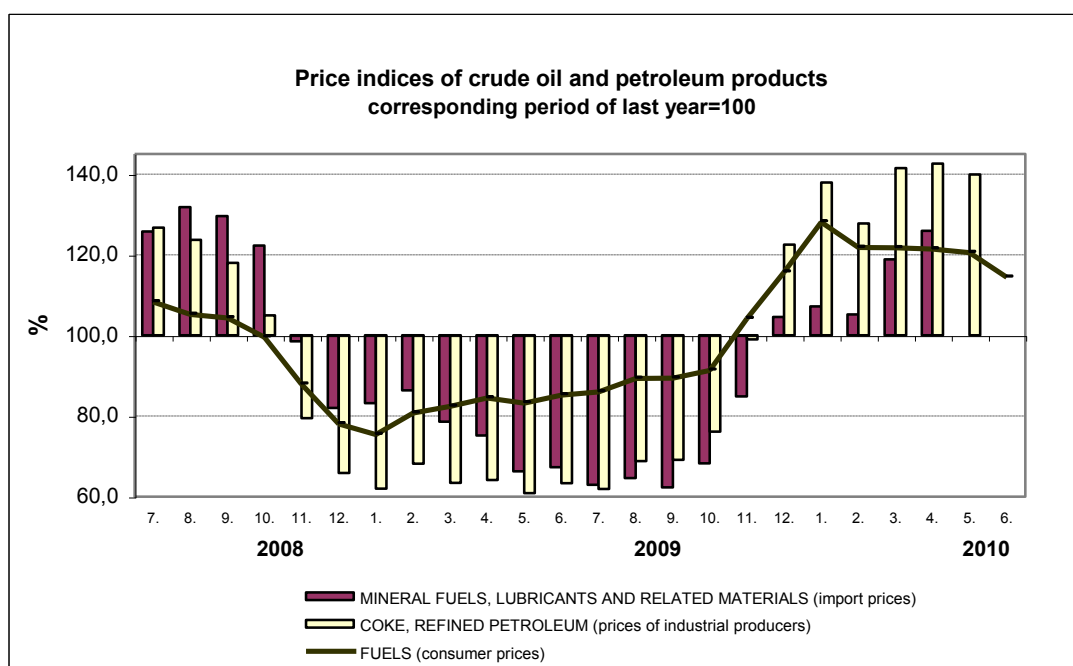


In **'health'**, prices and fees paid by patients on prescription drugs increased by 12.2%, which came partly from their significant decrease in Q2 2009.

In **'food and non-alcoholic beverages'** the year-on-year decrease in prices, running from Q1 2009, finished. A slowdown of the price drop or an acceleration of the price growth was recorded for many kinds of food in Q2 2010. This development corresponded to price movements of agricultural producers.

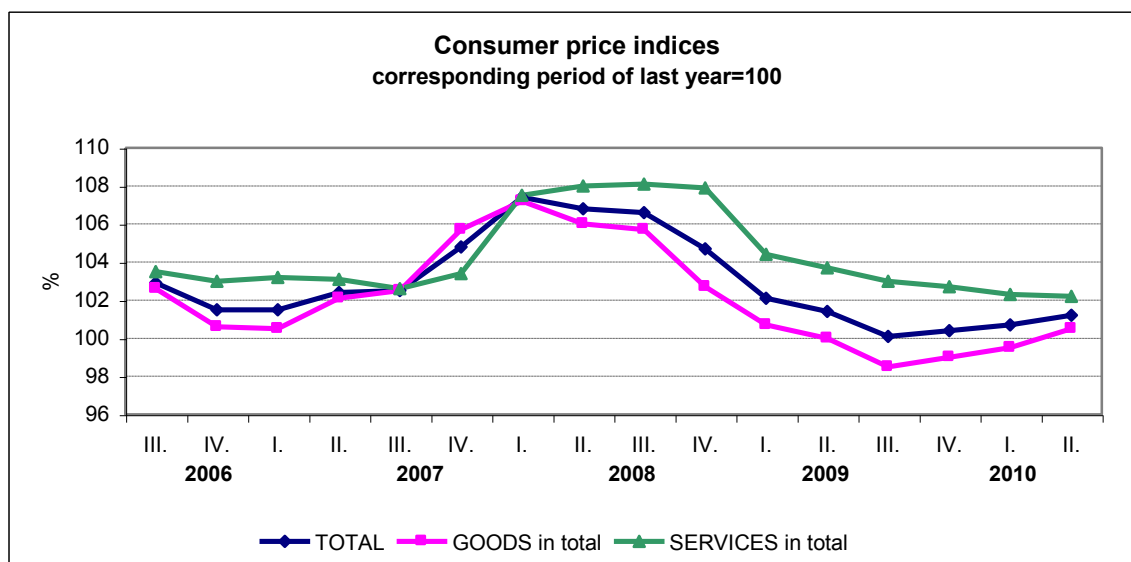


A slowdown of price growth in **'transport'** came mainly from automotive fuel prices, which in Q2 2010 increased, y-o-y, by 18.7%, while in Q1 2010 they were by 23.8% up. This was caused by a slower month-on-month growth of automotive fuel prices in Q2 2010 than in Q2 2009. The price rise in 'transport' slowed down due to lower prices of cars by 11.5%.



A long-term moderate price decrease continued in clothing, household appliances, mobile phones and services provided by mobile phone operators, audio-visual and photographic equipment and information processing equipment.

Prices of **goods in total** increased by 0.5% (from a drop -0.5% in Q1) and prices of **services** by 2.2% (in Q1 by 2.3%).



Harmonized index of consumer prices in the EU27

The development of the year-on-year increase in the **harmonized index of consumer prices (HICP)** in the EU 27 member states and the Czech Republic was similar, actual values established in the Czech Republic were approximately by 1 p.p. lower.

