

A photograph of a worker in a glass factory. The worker is wearing a dark blue uniform, a brown hard hat, and safety glasses. He is standing in profile, looking towards a conveyor belt where several glowing orange glass bottles are being processed. The background shows industrial machinery and bright factory lights. The bottom half of the image is overlaid with a blue geometric pattern.

ASOCIACE SKLÁŘSKÉHO
A KERAMICKÉHO PRŮMYSLU ČR

Association of the Glass and Ceramic Industry of the Czech Republic

ANNUAL REPORT

OF THE GLASS AND CERAMIC INDUSTRY
OF THE CZECH REPUBLIC FOR 2025

SEPTEMBER 2026

Foreword

Dear friends, glassmakers, ceramic manufacturers and porcelain producers,

A year ago, my predecessor posed a question here: will we be the ones who define the future of our industry, or the ones who let it slip away? The year 2025 gave a clear answer - tradition and craftsmanship alone will not secure the future.

The stability we had grown accustomed to is gone. The crisis in the Middle East is a lasting reality affecting global logistics and markets. A gas price of EUR 80/MWh is devastating for our energy-intensive industry - without meaningful action by the Czech government and Europe, we cannot remain competitive globally in the long term. Last year's blackout, which paralysed part of the Czech Republic for several hours, also painfully reminded us that the issue is not only the price of energy, but also its reliability. The vulnerability of supply chains for raw materials such as limestone, feldspar and synthetic soda ash is another reminder: when inputs are disrupted, furnaces stop.



At the same time, European administration is making absurd missteps - sanctions "forgot" Russian mirrors, placing our manufacturers at a competitive disadvantage. Aggressive Chinese dumped imports are putting severe pressure on both large and small companies, glassworks and jewellery manufacturers alike - while jewellery and art glass are pillars of our cultural DNA that we must not lose. Our close links with Germany and the worrying closure of a number of factories in our industry in the Czech Republic and neighbouring countries only confirm how sensitive the region around us is.

Let us not wait for a miracle from Brussels. Let us stand together, speak with one voice through the Association, and protect what we have inherited.

Thank you for your perseverance.

Ing. Jan Hadraba
President

Association of the Glass and Ceramic Industry of the Czech Republic



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Association of the Glass and Ceramic Industry of the Czech Republic

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INTRODUCTION

The introductory section of the Annual Report provides an overview of the position of the glass and ceramic industry within the manufacturing sector of the Czech Republic, its structure and its development in 2020-2025. The Report includes an overview of exports and imports by individual production sector. It also evaluates the activities of the Association of the Glass and Ceramic Industry of the Czech Republic during the period under review.

The data processed in the Report are based on data from the Czech Statistical Office (valid as of 30 June 2026). These data are supplemented by information obtained from the annual reports of Association members.

The classification and terminology of the manufacturing industry used in the chapter "Position of the Glass and Ceramic Industry in the Czech Republic" are based on those of the Czech Statistical Office.

The time series compared in the chapter "Development of the Glass and Ceramic Industry" cover the period 2020-2025.

In this Annual Report, the glass and ceramic industry is predominantly monitored and described separately in seven so-called aggregates. These aggregates consist of technologically and commercially related glass and ceramic production activities. This methodology also corresponds to the statistical reporting system used in the Czech Republic.

- **Flat glass (unprocessed and processed flat glass)**
- **Container glass (bottles, preserving jars and other glass containers)**
- **Glass fibres (reinforcement/textile fibres and insulation glass fibres)**
- **Other glass (special glass - laboratory glass and laboratory apparatus glass, tubing, glass parts for screens, technical beads, industrial glass apparatus, protective welding glass, optical glass, glass blocks, glass jewellery components, etc.) and lighting glass**
- **Tableware glass (drinking glass, household, decorative, art glass, etc.)**
- **Household porcelain and ceramics (household and decorative porcelain products, household ceramic products and decorative ceramics)**
- **Technical and sanitary ceramics (insulators, laboratory porcelain, ceramic products for sanitary purposes and products for technical applications).**

The Report does not separately monitor developments in the remaining group of activities (aggregate), comprising the production of machinery and equipment and services for the glass and ceramic industry. For statistical reporting purposes, activities related to this aggregate are recorded in a

number of different subsections of manufacturing, making it impossible to process and compare them reliably, particularly the numerical data.



ASSOCIATION OF THE GLASS AND CERAMIC INDUSTRY OF THE CZECH REPUBLIC

Association of the Glass and Ceramic Industry of the Czech Republic

The Association of the Glass and Ceramic Industry of the Czech Republic is a member of the Confederation of Industry of the Czech Republic and of Glass Alliance Europe.

The Association of the Glass and Ceramic Industry of the Czech Republic (the Association) was founded in 1990 as an interest association of manufacturers of flat, container, technical, tableware and lighting glass, glass and mineral fibres, household porcelain, household and sanitary ceramics, trading organisations, manufacturers of machinery and technological equipment and service organisations, vocational schools, research institutes and publishers of specialist journals. The Czech Glass Society and the Union of Glass and Jewellery Producers are members of the Association. Separate sections of this chapter are devoted to the Czech Glass Society and the Union of Glass and Jewellery Producers.

As of 31 December 2025, the Association had 46 member entities. The Association's activities in 2025 were governed by the Activity Plan approved by the General Assembly on 3 June 2025.

The Association's activities focus primarily on supporting, promoting and defending the interests and requirements of its members in relation to public authorities; organising cooperation among members in addressing common issues; the rational use of domestic raw materials; environmental matters; collective bargaining with the relevant trade union and the conclusion of collective agreements; maintaining a database for the strategic decision-making of its members; identifying foreign partners; coordinating research and development in the glass and ceramic industry in cooperation with specialist schools and institutions; providing professional and financial support for the publication of specialist literature and journals; and contributing to solutions in vocational education.

Activities of the Association in 2025

In 2025, the Association's principal mission continued to be the promotion and defence of the interests of the glass and ceramic industry in the Czech Republic, support for the competitiveness of member companies and the provision of high-quality professional and information services. Particular attention was paid to the impacts of the energy crisis, rising input raw-material prices, environmental and social legislation, labour-market issues and vocational education.

In 2025, the Association also played an important intermediary role between industry practice, public administration and European institutions. It helped member companies navigate a rapidly changing legislative and economic environment while providing public authorities and other partners with expert input based on companies' real operational experience.

Key challenges in 2025

For the glass and ceramic industry, 2025 was a year of continuing and, in some areas, deepening challenges. Member companies faced a combination of high energy prices, rising input costs, increasing regulatory requirements and uncertain demand in domestic and foreign markets. In particular, structural disadvantages affecting energy-intensive industries, the impacts of European climate and environmental policy, and pressure to maintain competitiveness against producers from third countries played a major role. At the same time, challenges intensified in securing skilled labour, generational renewal of the workforce and the long-term sustainability of vocational education. In this environment, the Association served as a stable platform for sharing information, coordinating

positions and promoting the common interests of the glass and ceramic industry at both national and European level.

Support for competitiveness

Supporting the competitiveness of the industry was one of the Association's main priorities in 2025. The Association has long focused on creating a stable and predictable business environment for energy-intensive industries and actively addresses issues that fundamentally affect their operation.

During 2025, the Association maintained an intensive dialogue with the Ministry of Industry and Trade, the Ministry of the Environment, the Ministry of Finance and other public authorities. Particular attention was paid to energy prices, compensation mechanisms and the impact of European climate and energy measures on the competitiveness of the Czech glass and ceramic industry.

The Association continued its close cooperation with the Confederation of Industry of the Czech Republic and the Alliance of Energy-Intensive Industries, of which it is a founding member. At international level, it represented the interests of the Czech glass industry through Glass Alliance Europe and, in ceramics and porcelain, through cooperation with Cerame-Unie.

The Association's expert working groups also played an important role, particularly in the fields of energy and higher-level collective bargaining. These groups addressed current industry challenges and prepared expert positions promoted at national and European level, with active participation by member companies.

In 2025, a meeting of the High-Level Working Group for the Glass and Ceramic Industry was also held, focusing on strategic issues for the industry's further development. The Association continued to cooperate with the Czech Glass Society and the Union of Glass and Jewellery Producers on the basis of a long-standing memorandum of cooperation.

Limits of the Association's influence

The Association is also aware of the limits of its influence. A number of key factors affecting the competitiveness of the glass and ceramic industry - particularly energy-price developments, EU-wide legislation and long-term demographic trends - are beyond the scope of direct influence at national level. The Association's role therefore remains to systematically promote the industry's interests, provide early warning of risks and seek realistic solutions in cooperation with key partners.

Environment

In the environmental field, the Association focused in 2025 primarily on monitoring and commenting on European and national legislation with a major impact on the glass and ceramic industry.

The Association worked closely with Glass Alliance Europe, the Ministry of the Environment, the Ministry of Industry and Trade and the Confederation of Industry of the Czech Republic. Particular attention was paid to REACH, RoHS, the EU ETS, IPPC and other related regulations.

An important area was raw-material self-sufficiency and recycling, particularly waste flat and container glass. The Association participated in implementing the Action Plan to Support Increased Raw-Material Self-Sufficiency of the Czech Republic and actively promoted industry interests in the preparation of related legislative measures.

In cooperation with member companies, the Association also addressed chemical regulation, the protection of key raw materials and the safety of products intended to come into contact with food, including monitoring changes to migration limits and other specific requirements.

Social dialogue

In 2025, the Association acted as an employers' organisation and actively contributed to the development of social dialogue in the industry. A key area was higher-level collective bargaining with the Trade Union of Glass, Ceramics and Porcelain.

During 2025, negotiations were held on an amendment to the Higher-Level Collective Agreement for 2025-2026, with the aim of maintaining stable working conditions and social peace.

The Association also actively participated in the Confederation of Industry of the Czech Republic project "Linking National, Sectoral and Regional Social Dialogue in the Czech Republic" (NORD). In October 2025, in cooperation with the trade union, it organised a Seminar on Social Dialogue and Collective Bargaining focused on exchanging experience and strengthening cooperation between the social partners.

Education

(apprenticeship, secondary and higher education)

Support for vocational education is a long-term priority of the Association. In 2025, the Association focused on deepening cooperation between schools and industrial practice and on supporting the quality of vocational education in the glass, ceramic and jewellery sectors.

The Association communicated actively with vocational schools and supported professional placements and cooperation between schools and companies in order to improve graduates' readiness to enter the labour market. A key challenge remains the need for stronger employer involvement in vocational education and practical training.

Services and information support

In 2025, the Association's Secretariat provided extensive information services to the membership. It collected, analysed and distributed key information concerning industry developments, the energy situation, legislative changes and other relevant topics.

Particular emphasis was placed on monitoring the impacts of the energy crisis and informing members promptly about current developments and available support. Regular information services included

distribution of the Association newsletter, Glass Alliance Europe newsletters and other specialist information.

The Association continuously updated its website, www.askpcr.cz, and the specialist portal www.skloakeramika.cz. Active communication also took place via social media, particularly Facebook and LinkedIn.

Promotion of the Association and its members

The Association continued systematic media and public-awareness activities aimed at strengthening the positive image of the glass and ceramic industry among both professional audiences and the general public. An important part of these activities was supporting recruitment of new employees and encouraging young people to study vocational fields.

An important role was also played by promotion of the "Czech Product - Guaranteed by the Association of the Glass and Ceramic Industry of the Czech Republic" label, which highlights the quality and origin of Czech products.

In 2025, the Association published the Annual Report of the Glass and Ceramic Industry in the Czech Republic for 2024, prepared in cooperation with member companies and the Czech Statistical Office.

The Association cooperated with specialist and mainstream media, regularly published articles in the journal *Sklář a keramik* (Glass and Ceramics), and contributed to media coverage on Czech Television, Czech Radio and in economic media.

In 2025, the Association organised the conference Development of the Glass and Ceramic Industry and Craft in the Czech Republic and the 11th Glassmakers and Ceramic Manufacturers Meeting, held at the turn of September and October 2025 in Humpolec.

Conclusion

For the glass and ceramic industry, 2025 was a year of significant challenges, particularly in energy, regulation and the labour market. During the year, the Association served as a stable partner for its members, public administration and European institutions and actively promoted the interests of the industry.

The Association will continue to work to strengthen the competitiveness of the glass and ceramic industry, support high-quality social dialogue, develop vocational education and ensure a stable business environment for its members.

Czech Glass Society

Management of the Society

In 2025, the Czech Glass Society (registered association, Company ID No. 18382649) was led by Chairman Prof. RNDr. Ondrej Gedeon, Ph.D., DSc., Vice-Chairman Ing. Jan Macháček, Ph.D., and Scientific Secretary Prof. Ing. Aleš Helebrant, CSc. There were no personnel changes among the members of the Society's Presidium. Mgr. Milan Hlaveš, Ph.D., continued to serve as Secretary.

Professional meetings and conferences The Presidium of the Czech Glass Society met three times during the year: at the Crystalex glassworks in Nový Bor, at the congress centre in Mělník and during the members' meeting at the headquarters of the Czech Association of Scientific and Technical Societies in Prague. Regular working meetings of the core management team were hosted by the Department of Glass and Ceramics at the University of Chemistry and Technology, Prague.

Publishing activities The Society continued to publish the prestigious print journal *Sklář a keramik* (Glass and Ceramics), which has been published since 1924. Six double issues published last year contained 288 pages of specialist articles, news and information on glass and ceramics in the fields of technology, art, business and education.

International cooperation and partnerships The Czech Glass Society is strengthening its position in the global scientific community through active engagement in the International Commission on Glass (ICG), where Society members serve on individual technical committees and its representatives actively participate in ICG meetings. A notable diplomatic success was the election of Society member Ing. Erik Muijsenberg as Vice-President of the ICG Council. The Society continues to develop bilateral relations with partners in Germany (DGG) and Slovakia and is a full member of the ESG (European Society of Glass Science and Technology).

Professional conferences and seminars

The Czech Glass Society participated in organising the 30th edition of the Inorganic Non-Metallic Materials seminar, organised for young researchers by the University of Chemistry and Technology, Prague. Doctoral students from the Czech Republic and Slovakia took part.

The Czech Glass Society co-organised the Czech and Slovak Glass Conference held in Trenčín from 10 to 14 November. The Society and the Slovak Glass Society take turns organising the conference at three-year intervals.

The Czech Glass Society was a partner of the conference Development of the Glass and Ceramic Industry and Craft, jointly organised by the Association of the Glass and Ceramic Industry of the Czech Republic and the Ministry of Industry and Trade of the Czech Republic.

Awards within the Society

The 2024 Glass Award was jointly presented to glass technologists and entrepreneurs Ing. Jaroslav Švácha and Ing. Hana Sůvová; for 2025, the award went to technologist and scientist Ing. Pavel Hrna, CSc. (Czech Republic/USA).

Honorary membership was awarded to distinguished members of the Czech Glass Society Committee: former Chairman Ing. Petr Beránek and long-serving Vice-Chairman Prof. Ing. Ladislav Koudelka, DrSc., who also received a medal marking the anniversary of the Czech Association of Scientific and Technical Societies.

Regional activities and services

The Nový Bor Glass Club, a branch of the Czech Glass Society, organised a number of lectures, specialist excursions and other events. Ing. Jaroslav Švácha became the club's new Chairman.

The specialist library of the Czech Glass Society remained open to the public at the premises of the Municipal Office in Kamenický Šenov.

Other activities

In the Czech Republic, the Czech Glass Society continued to be a partner of the CzechglassCompetence.com portal administered by the Museum of Glass and Jewellery in Jablonec nad Nisou. The Society also supported the Master of Crystal design competition, and its members attended the 11th Glassmakers and Ceramic Manufacturers Meeting organised by the Association of the Glass and Ceramic Industry of the Czech Republic.

In 2025, the Czech Glass Society launched a new version of its website, www.czech-glass-society.cz.

Union of Glass and Jewellery Producers

The Union of Glass and Jewellery Producers (SVSB) has 52 members, including four secondary schools, the Technical University of Liberec and the Museum of Glass and Jewellery. Its membership base is sufficiently broad and represents the industry producing beads, costume jewellery, jewellery and glass gift items.

SVSB maintains extensive contacts with key institutions at central, regional and local level, including the Ministry of Foreign Affairs, the Ministry of Industry and Trade and the Ministry of Culture of the Czech Republic.



STRUCTURE OF THE GLASS AND CERAMIC INDUSTRY IN THE CZECH REPUBLIC

The structure of the glass and ceramic industry in the Czech Republic is described below according to individual production sectors, using the same classification as in the following sections of this Annual Report. For each sector, companies whose economic importance and prestige help define the sector are listed. Basic information is also provided on Czech manufacturers of machinery and equipment, providers of services, and suppliers of basic raw materials for the glass and ceramic industry.

As of 30 June 2025, there were 129 companies in the Czech Republic with more than 50 employees:

CZ-NACE 23.1 - Manufacture of glass and glass products includes 108 companies. By monitored production sector, there are 32 flat-glass companies, 38 hollow-glass companies (of which 4 are container-glass manufacturers, while the remaining companies produce tableware glass), 6 producers of glass fibres and products made from them, and 32 companies in the so-called other-glass group (see the following text).

CZ-NACE 23.41 - Manufacture of ceramic and porcelain products mainly for household and ornamental purposes includes 19 companies, of which 7 are porcelain manufacturers.

CZ-NACE 23.42 - Manufacture of ceramic sanitary fixtures includes 2 companies.

Flat glass

AGC Flat Glass Czech, a.s.: a key player in flat-glass production and processing

The only producer of large-format flat glass in the Czech Republic is AGC Flat Glass Czech, a.s., a member of the AGC Group headquartered in Teplice. The company is currently the largest producer of flat glass and its applications in Central and Eastern Europe. The company is wholly owned by Asahi Glass Co. Ltd., Japan.

The activities of AGC Flat Glass Czech, a.s. include the production of basic float glass in clear or specified shades of green and grey. Further processing transforms this glass into low-emissivity glass controlling

light and energy transmission, laminated or toughened safety glass, sound-insulating glass, frosted or lacquered glass for exterior and interior applications, and mirrors. Further processing produces insulating double and triple glazing, bent architectural glass, furniture glass, glass for solar applications and fire-resistant glass. In addition to float glass, the company produces dozens of patterns of rolled patterned glass. Its commercial policy is based primarily on exports to Central and Eastern European countries, although its products are also sold through the AGC Group's worldwide sales network.

AGC Flat Glass Czech, a.s. is supported in the Czech Republic, Slovakia and Poland by a sales network of subsidiaries providing further processing of glass for architecture and construction. Through these companies, AGC also supplies significant volumes of unprocessed flat glass to independent processing companies.

A large volume of flat glass is processed in the Czech Republic by the AGC Group's automotive division, specifically AGC Automotive Czech, a.s., headquartered in Chudeřice near Bílina. AGC Automotive Czech, a.s. manufactures toughened and laminated safety glass primarily for passenger cars, but also for trucks and buses, including additional operations such as the application of encapsulated or extruded plastic profiles and required additional components (trim strips, pins, connectors, holders, etc.). AGC Automotive Czech, a.s. produces and sells approximately 25 million automotive glass units per year and is therefore one of the largest and most comprehensive manufacturers of its kind in Europe.

The company is part of the European group of manufacturing, development and sales entities of AGC Automotive Europe Ltd., whose activities are concentrated in Belgium, the Czech Republic, France, Italy, Hungary, Germany, Russia, Spain, Turkey and the United Kingdom. The group manufactures more than 70 million windscreens, side, rear and roof safety-glass units annually.

AGC Automotive Europe Ltd. is part of the globally operating Automotive Glass Company of Asahi Glass Co., Ltd., Japan. Its vision is to be the world's most respected supplier of all types of safety glass for the automotive industry.

A number of other companies in the Czech Republic process flat glass into various specialised products. These include, for example, Saint-Gobain Sekurit ČR, spol. s r.o., and NSG Group (Pilkington AGR Czech spol. s r.o.), producing glass for passenger cars; Amirro, s.r.o., Čelákovice, manufacturing mirrors and furniture glass; ERTL GLAS, s.r.o., Říčany, producing laminated safety glass and heat-protection glass; WMA-Glass, s.r.o., Chrastava, producing insulating glass units; Bepof spol. s r.o., Hranice u Aše, processing flat glass and mirrors; and others.

In addition to the companies listed above, there are also a number of wholesalers trading in products and services related to processed flat glass.

Container glass

Container-glass production includes beverage bottles and preserving jars for the food industry (beer, wine, spirits, soft drinks, mineral water, fruit, etc.), as well as glass packaging for the chemical, pharmaceutical and cosmetics industries.

The dominant container-glass manufacturers in the Czech Republic are O-I Czech Republic, a.s., a member of the multinational Owens-Illinois group (USA), and VETROPACK MORAVIA GLASS, akciová společnost, Kyjov, part of the multinational Vetropack Holding AG group headquartered in Switzerland. Together, these two groups account for around 80% of the Czech market for this container-glass segment and, through their multinational ownership and commercial links, also have significant export shares in neighbouring countries.

Other glass-container manufacturers operating in the Czech Republic include SKLÁRNÝ MORAVIA, akciová společnost, Úsobrno, and STÖLZLE-UNION, s.r.o., Heřmanova Huť (owned by Stölzle-Oberglas GmbH).

Glass fibres and products made from them

The only manufacturer of textile glass fibres and products made from them in the Czech Republic is SAINT-GOBAIN ADFORS CZ, s.r.o., Litomyšl, which organisationally belongs to the Saint-Gobain Group's Innovative Materials sector. Its product activities include "Vertex" and "ADFORS CONSTRUCTION PRODUCTS EUROPE". The term "CONSTRUCTION PRODUCTS" reflects the end use of the company's products.

The only Czech manufacturer producing thermal and acoustic insulation from glass fibres in the form of mats and boards is Union Lesní Brána, a.s., Dubí near Teplice.

KNAUF INSULATION, spol. s r.o., Krupka near Teplice, manufactures glass-wool insulation material in the form of boards and rolls. The Krupka plant is one of the most modern glass-wool mineral-insulation production facilities in Europe.

Tableware glass

There are approximately thirty companies in the Czech Republic with more than 20 employees whose principal production activity is tableware glass. The largest include Crystalex CZ, s.r.o., with a production plant in Nový Bor (machine production of soda-potash tableware glass), Crystal BOHEMIA, a.s., Poděbrady (lead crystal), and CRYSTALITE BOHEMIA s.r.o., Světlá nad Sázavou. The latter two companies were merged under the Poděbrady glassworks in 2020. There is also a large number of smaller companies offering a highly diverse product range - art glass, cut lead crystal, tableware glass decorated by painting, pen drawing, staining, high enamel and engraving, handmade tableware glass, historical replicas, hot-worked glass, etc. Examples include Ajeto spol. s r.o. Czech Glass Craft, Lindava; CAESAR CRYSTAL BOHEMIAE, a.s., Světlá nad Sázavou; Královská Huť, s.r.o., Doksy; BMRC Group s.r.o., Světlá nad Sázavou; and many others.

Exclusive handmade tableware glass is produced by MOSER, a.s., Karlovy Vary.

Heat-resistant household glassware is produced by KAVALIERRGLASS, a.s., Sázava.

Other glass

Products classified in this branch of the glass industry are often referred to, particularly abroad, as special glass. They comprise a wide range of glass products with precisely defined special properties, supplied mainly to other processing industries. The product range of this sector in the Czech Republic is very broad. It includes technical glass, laboratory glass and laboratory apparatus glass, technical beads, industrial glass apparatus, protective welding glass and optical glass, as well as glass blocks for construction, glass jewellery components and lighting glass.

The dominant Czech manufacturer of technical and laboratory glass, tubing and borosilicate-glass apparatus is KAVALLIERGLASS, a.s., Sázava. Technical and laboratory glass is also produced by TECHNOSKLO, s.r.o., Držkov; EXATHERM, s.r.o., Železný Brod (glass thermometers and hydrometers); Detesk, s.r.o., Železný Brod (technical borosilicate glass); and other smaller companies.

Among optical-glass manufacturers, ECOGLASS, a.s., Jablonec nad Nisou, may be mentioned; the company produces precision-moulded optical-glass components for electro-optical instruments.

VITRABLOK, s.r.o., Duchcov, manufactures glass blocks for the construction industry.

Frits and glazes are produced by Glazura s.r.o.

Glass jewellery components are produced by a number of companies, mostly in the north of the Czech Republic in the Jablonec region (Preciosa, a.s., PAS Jablonec, a.s.).

Lighting glass is produced by Sklárna Janštejn, s.r.o. and is also part of the supplementary range of several tableware- and technical-glass manufacturers. A number of companies manufacture chandelier components and complete chandeliers; the most important manufacturer is Preciosa-lustry, a.s.

Household porcelain and ceramics

The range of household porcelain covers products for ordinary everyday use through to luxury items, such as premium tableware porcelain, household and decorative pink porcelain, onion-pattern porcelain and figurines.

Major porcelain manufacturers include Thun 1794 a.s., Nová Role; Český porcelán, a.s., Dubí; G. Benedikt Karlovy Vary, s.r.o.; Rudolf Kämpf s.r.o., Nové Sedlo; and König-Porzellan Sokolov, spol. s r.o., Sokolov.

Household ceramics are produced by a considerable number of smaller specialised manufacturers. The largest include, for example, Keramika Krumvíř, spol. s r.o. Ceramic stove tiles are produced by KERAMIA, s.r.o., Znojmo.

Technical and sanitary ceramics

The two dominant Czech producers of sanitary ceramics are LAUFEN CZ, s.r.o. (with production plants in Bechyně and Znojmo), a member of the Roca Group, and Ideal Standard, s.r.o., Teplice. Both companies are strongly export-oriented and their market performance therefore depends to a considerable extent on developments in the European construction industry.

Technical-porcelain manufacturers include Jizerská porcelánka, s.r.o., Desná in the Jizera Mountains, which produces laboratory porcelain and porcelain tubes, and ELPOR k.s., Krupka-Bohosudov.

Other companies include, for example, KERAMTECH, s.r.o., Žacléř, producing foundry ceramics and technical porcelain; BRISK TÁBOR, a.s., producing spark plugs and glow plugs for internal-combustion engines and technical ceramics; a plant in Bělá nad Radbuzou producing technical ceramics for foundries; ESTCOM CZ-oxidová keramika, a.s., Louny, producing refractory ceramics and ceramic tubes; Diamorph Hob Certec, s.r.o., Horní Bříza, producing technical ceramics; and others.

Other mineral products

High-temperature-resistant aluminosilicate fibres and SIBRAL-brand insulating fibre products made from them (wool, mats, shapes and boards), used particularly in the construction of thermal equipment, are produced by UNIFRAX, s.r.o., Dubí near Teplice.

EUTIT, s.r.o., Stará Voda, manufactures products from fused basalt (EUROR-brand wear-resistant and refractory materials), wear-resistant piping, and industrial and interior tiles. The company is the world's only producer of interior basalt tiles.

Furnaces, machinery and equipment, and professional services for the glass and ceramic industry

There are currently around forty to fifty independent companies in the Czech Republic that manufacture and supply furnaces, machinery and equipment, glass moulds and instruments used in glass and ceramic production, as well as companies providing servicing, design, specialist and consultancy work for these industries. These companies vary in size and, naturally, in the geographic scope of their activities.

Companies conducting independent production and commercial activities extending significantly beyond the Czech Republic include a number of machinery and equipment manufacturers - in particular Sklostroj Turnov CZ, s.r.o., which manufactures machinery and equipment for automated container-glass production. Other examples include SKLOPAN LIBEREC, a.s., which manufactures flat-glass processing machinery, and SKLÁŘSKÉ STROJE ZNOJMO, s.r.o., which supplies various types of machinery for the glass industry. Thermal equipment and furnaces for firing porcelain and ceramics are designed and built on a comprehensive and larger scale by REALISTIC, a.s., Karlovy Vary; BVD PECE, spol. s r.o., Karlovy Vary; and LAC, s.r.o., Židlochovice. Elsklo, spol. s r.o., Desná in the Jizera Mountains, designs and supplies equipment for small-scale electric glass melting. Glassmaking furnace units are

designed and built by Teplotechna-Prima, s.r.o., Teplice. GLASS SERVICE, a.s., Vsetín, has significant international activities in the design and control systems of glass-melting units, as does DITES, spol. s r.o., Teplice (automated technological-process control systems). Gas-fired melting furnaces and auxiliary furnaces for handmade-glass production are manufactured by EGT servis, s.r.o., Hradec Králové.

Manufacturers and suppliers working mainly at the level of services and supplies for Czech producers include SKLOFORM, a.s., Suchdol nad Lužnicí, a manufacturer and supplier of cast-iron and steel moulds for container glass. DESKO, a.s., Desná in the Jizera Mountains, supplies machinery and moulds for jewellery production. Other manufacturers of machinery for glass production include FOR G, s.r.o., Teplice, and BOHEMIA MACHINE, s.r.o., Světlá nad Sázavou.

A relatively large group of companies and a number of independent specialists design processes and build machinery for mechanical glass processing (engraving, grinding and polishing), including DIAS TURNOV, s.r.o., and POLPUR, spol. s r.o., Turnov.

Raw materials for the glass and ceramic industry

The long tradition and development of glass, porcelain and ceramic production have depended, among other factors, on the availability of basic raw materials, i.e. sand, kaolin, feldspar and quartz.

High-quality glassmaking sands with an extremely high SiO₂ content are excellent for the glass industry and for a wide range of applications in other sectors. The sands are supplied both wet and dried. In the Czech Republic, these sands are extracted and supplied by Provodínské písky, a.s., Provodín, and Sklopísek Střeleč, a.s., Mladějov v Čechách.

Kaolin is extracted and processed by LB MINERALS, s.r.o.; Sedlecký kaolin, a.s.; and Kaolin Hlubany, a.s., Podbořany. LB MINERALS, s.r.o., Horní Bříza, supplies ceramic kaolins for wall and floor tiles and sanitary ceramics, blended kaolins for sanitary ceramics, paper kaolins and kaolins for glass fibres. Washed kaolin supplied by Sedlecký kaolin, a.s. is used mainly for porcelain and ceramics. Kaolin Hlubany, a.s. supplies washed ceramic kaolins.

In addition to extracting and processing kaolin, LB MINERALS, s.r.o. also extracts and processes feldspar. Potassium feldspars are suitable for the manufacture of container and sheet glass, glazes and porcelain, while sodium-calcium feldspars are used for frits and enamels. Sodium-potassium to potassium-sodium feldspars are also supplied by K M K GRANIT, a.s., Krásno. Feldspars are used as fluxes.



POSITION OF THE GLASS AND CERAMIC INDUSTRY IN THE CZECH REPUBLIC

The glass and ceramic industry is a traditional part of manufacturing in the Czech Republic.

According to NACE - the Statistical Classification of Economic Activities used by the European Union - the glass and ceramic industry is classified under the Manufacture of other non-metallic mineral products.

CZ-NACE 23 Manufacture of other non-metallic mineral products combines the manufacture of glass, ceramics and construction materials of various types and uses. Production of these commodities has a long tradition and a high standard in the Czech Republic.

CZ-NACE 23 activities are classified as follows:

- 23.1 Manufacture of glass and glass products
- 23.2 Manufacture of refractory products
- 23.3 Manufacture of clay building materials
- 23.4 Manufacture of other porcelain and ceramic products
- 23.5 Manufacture of cement, lime and plaster
- 23.6 Manufacture of articles of concrete, cement and plaster
- 23.7 Cutting, shaping and finishing of stone
- 23.9 Manufacture of abrasive products and other non-metallic mineral products n.e.c.

Of these, sectors 23.1 and 23.4:

23.41 Manufacture of ceramic and porcelain household and ornamental articles

23.42 Manufacture of ceramic sanitary fixtures

23.43 Manufacture of ceramic insulators and insulating fittings

23.44 Manufacture of other technical ceramic products

represent the manufacture of glass and glass products and of porcelain and ceramic products assessed in this Annual Report.

The following tables show net sales excluding VAT from the sale of own products and services of an industrial nature (hereinafter "sales") and net sales excluding VAT from direct exports (hereinafter "direct exports") in the individual manufacturing industries. Sales and direct exports are stated at current prices. Sales and direct exports exclude CZ-NACE 33 Repair and installation of machinery and equipment.

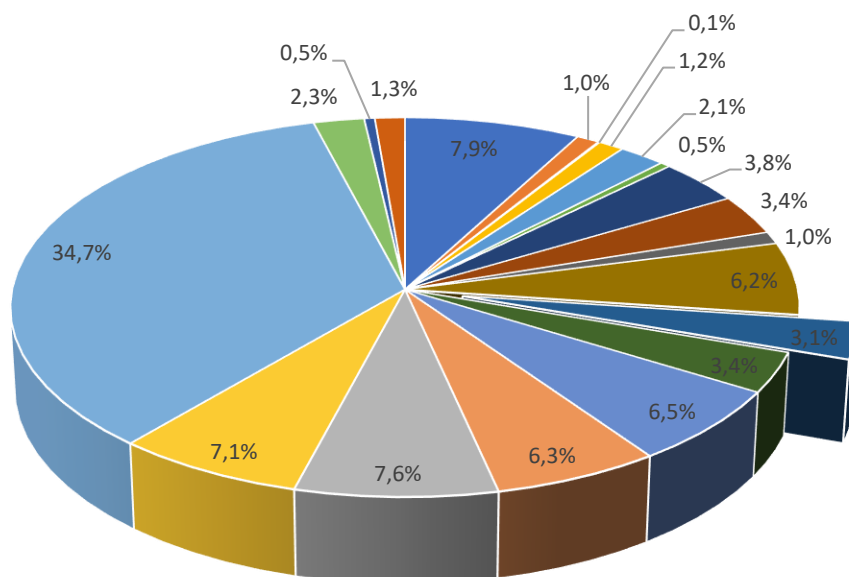
In 2025, sales in the manufacturing industry in the Czech Republic amounted to CZK 4,807.46 billion (compared with CZK 4,792.63 billion in 2024). Manufacturing sales therefore increased by 0.31% year on year.

Sales of CZK 151.09 billion in the "Manufacture of other non-metallic mineral products" industry represented an increase of 2.22% compared with 2024. In 2025, this industry accounted for 3.14% of total manufacturing sales.

Manufacturing industry sales in 2025

	Sales	Share
	(CZK billion)	(%)
Manufacture of food products and beverages	378,9	7,9
Manufacture of textiles and wearing apparel	49,4	1,0
Manufacture of leather and related products	3,2	0,1
Manufacture of wood and of products of wood, cork, straw and plaiting materials, except furniture	55,9	1,2
Manufacture of paper and paper products	101,6	2,1
Printing and reproduction of recorded media	22,2	0,5
Manufacture of tobacco products, coke and refined petroleum products, and repair and installation of machinery and equipment	183,6	3,8
Manufacture of chemicals and chemical products	163,4	3,4
Manufacture of basic pharmaceutical products and pharmaceutical preparations	49,9	1,0
Manufacture of rubber and plastic products	296,3	6,2
Manufacture of other non-metallic mineral products	151,1	3,1
Manufacture of basic metals; casting of metals	165,4	3,4
Manufacture of fabricated metal products, except machinery and equipment	313,8	6,5
Manufacture of computer, electronic and optical products and equipment	301,9	6,3
Manufacture of electrical equipment	365,7	7,6
Manufacture of machinery and equipment n.e.c.	342,0	7,1
Manufacture of motor vehicles (except motorcycles), trailers and semi-trailers	1666,7	34,7
Manufacture of other transport equipment	109,2	2,3
Manufacture of furniture	22,7	0,5
Other manufacturing n.e.c.	64,6	1,3
Manufacturing	4 807,45	100,0

Structure of manufacturing industry sales in 2025



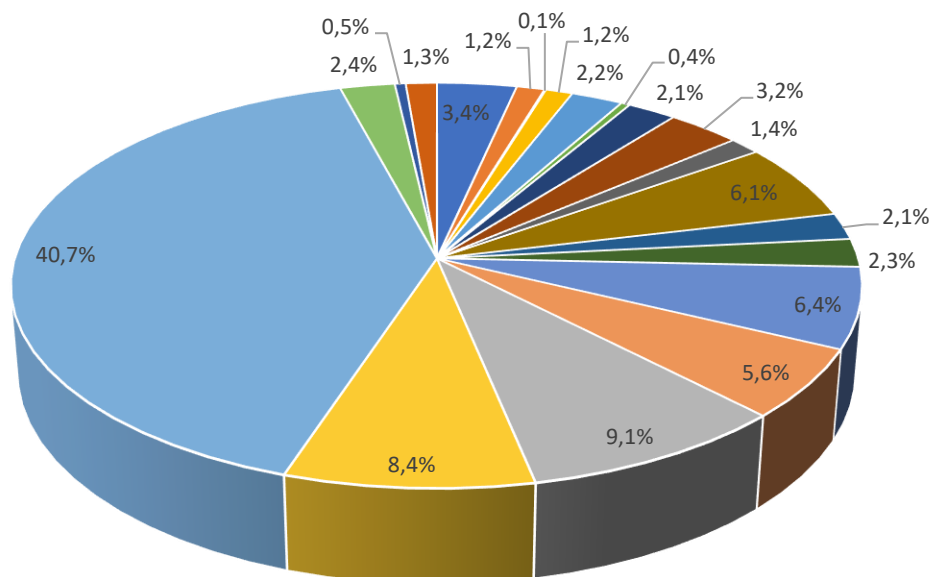
- | | |
|---|-------------------------------|
| ■ Food & beverages | ■ Textiles & apparel |
| ■ Leather | ■ Wood products |
| ■ Paper | ■ Printing/media |
| ■ Tobacco/coke/petroleum + machinery services | ■ Chemicals |
| ■ Pharmaceuticals | ■ Rubber/plastics |
| ■ Non-metallic minerals | ■ Basic metals |
| ■ Fabricated metals | ■ Computer/electronic/optical |
| ■ Electrical equipment | ■ Machinery & equipment |
| ■ Motor vehicles/trailers | ■ Other transport |
| ■ Furniture | ■ Other manufacturing |

Direct exports of the manufacturing industry in 2025

Direct exports of the manufacturing industry totalled CZK 2,987.03 billion in 2025, 1.17% more than in 2024, when they amounted to CZK 2,952.55 billion.

	Exports (CZK billion)	Share (%)
Manufacture of food products and beverages	102,7	3,4
Manufacture of textiles and wearing apparel	36,2	1,2
Manufacture of leather and related products	1,8	0,1
Manufacture of wood and of products of wood, cork, straw and plaiting materials, except furniture	35,0	1,2
Manufacture of paper and paper products	67,1	2,2
Printing and reproduction of recorded media	11,6	0,4
Manufacture of tobacco products, coke and refined petroleum products, and repair and installation of machinery and equipment	63,7	2,1
Manufacture of chemicals and chemical products	95,3	3,2
Manufacture of basic pharmaceutical products and pharmaceutical preparations	41,2	1,4
Manufacture of rubber and plastic products	181,6	6,1
Manufacture of other non-metallic mineral products	63,5	2,1
Manufacture of basic metals; casting of metals	67,3	2,3
Manufacture of fabricated metal products, except machinery and equipment	191,8	6,4
Manufacture of computer, electronic and optical products and equipment	166,8	5,6
Manufacture of electrical equipment	270,7	9,1
Manufacture of machinery and equipment n.e.c.	250,2	8,4
Manufacture of motor vehicles (except motorcycles), trailers and semi-trailers	1216,1	40,7
Manufacture of other transport equipment	70,5	2,4
Manufacture of furniture	14,0	0,5
Other manufacturing n.e.c.	40,1	1,3
Manufacturing	2 987,03	100,0

Structure of direct exports of the manufacturing industry in 2025



- Food & beverages
- Leather
- Paper
- Tobacco/coke/petroleum + machinery services
- Pharmaceuticals
- Non-metallic minerals
- Fabricated metals
- Electrical equipment
- Motor vehicles/trailers
- Furniture
- Textiles & apparel
- Wood products
- Printing/media
- Chemicals
- Rubber/plastics
- Basic metals
- Computer/electronic/optical
- Machinery & equipment
- Other transport
- Other manufacturing

The following table ranks the individual manufacturing industries according to the year-on-year change in sales achieved between 2025 and 2024. These year-on-year changes are used here as indicators of the growth dynamics of individual industries.

Sales dynamics by manufacturing industry

The largest increase was recorded in the Manufacture of computer, electronic and optical products and equipment.

	Sales 2024	Sales 2025	Index 25/24
	(CZK billion)	(CZK billion)	(%)
Manufacture of leather and related products	3,60	3,16	87,8
Other manufacturing n.e.c.	63,23	64,58	102,1
Manufacture of computer, electronic and optical products and equipment	320,54	301,90	94,2
Manufacture of other transport equipment	93,83	109,20	116,4
Manufacture of fabricated metal products, except machinery and equipment	290,98	313,81	107,8
Manufacture of wood and of products of wood, cork, straw and plaiting materials, except furniture	53,00	55,89	105,5
Manufacture of machinery and equipment n.e.c.	342,67	342,01	99,8
Manufacture of electrical equipment	368,93	365,73	99,1
Manufacture of paper and paper products	101,04	101,61	100,6
Manufacture of textiles and wearing apparel	50,19	49,37	98,4
Manufacturing	3 917,40	4 807,46	0,0
Manufacture of food products and beverages	368,24	378,88	102,9
Manufacture of other non-metallic mineral products	147,81	151,09	102,2
Manufacture of rubber and plastic products	287,13	296,34	103,2
Manufacture of basic pharmaceutical products and pharmaceutical preparations	49,47	49,87	100,8
Manufacture of furniture	23,97	22,72	94,8
Manufacture of motor vehicles (except motorcycles), trailers and semi-trailers	1668,20	1666,69	99,9
Manufacture of chemicals and chemical products	173,28	163,38	94,3
Manufacture of basic metals; casting of metals	169,89	165,43	97,4
Manufacture of tobacco products, coke and refined petroleum products, and repair and installation of machinery and equipment	192,23	183,57	95,5
Printing and reproduction of recorded media	24,41	22,22	91,0

Glass and ceramic industry

The following chapter, "Development of the Glass and Ceramic Industry in 2020-2025", provides a more detailed analysis and description, by sector, of the glass and ceramic industry as part of Czech manufacturing, corresponding to the characteristic activities of organisations affiliated with the Association. To explain the relationship between manufacturing, the manufacture of other non-metallic mineral products and the glass and ceramic industry, an explanatory table is provided below.

The glass and ceramic industry within manufacturing in 2025

	Sales	Direct exports
Glass and ceramic industry		
Indicators in CZK billion (current prices)	57,01	33,66
Share in other non-metallic mineral products (%)	37,73	53,02
Share in manufacturing (%)	1,19	1,13
Manufacture of other non-metallic mineral products		
Indicators in CZK billion (current prices)	151,09	63,48
Share in manufacturing (%)	3,14	2,13
Manufacturing		
Indicators in CZK billion (current prices)	4807,46	2987,03

Compared with 2024, sales in the glass and ceramic industry decreased by CZK 1.55 billion in 2025, i.e. by 2.6%, while direct exports decreased by CZK 2.15 billion, i.e. by 6.0%.



DEVELOPMENT OF THE GLASS AND CERAMIC INDUSTRY IN 2020-2025

This section of the Annual Report presents characteristic values of the main production indicators of the Czech glass and ceramic industry in 2025 and over the period 2020-2025. Based on these data and in the context of the Czech Republic's actual external and internal environment, the aim is to analyse and describe the principal trends in the industry's economic indicators over the years concerned.

The analysis of the development of the glass and ceramic industry begins with an overview of the principal macroeconomic indicators for the Czech Republic in the monitored period 2020-2025, in order to provide a broader context.

Main macroeconomic indicators of the Czech Republic in 2020-2025

(Czech Statistical Office, Czech National Bank and Ministry of Finance of the Czech Republic - August 2026)

		2020	2021	2022	2023	2024	2025
Gross domestic product	growth in %, real terms	-5,3	4,0	2,8	0,0	1,3	2,6
Average inflation rate	%	3,2	3,8	15,1	10,7	2,4	2,5
General unemployment rate¹	average in %	2,5	2,7	2,2	2,6	2,6	2,8
Growth in average real wages²	%	1,4	1,9	-9,4	-3,2	4,1	4,0
Trade balance³	CZK billion	179,6	-9,2	-204,8	122,5	220,5	200,2
CZK / EUR	annual average	26,4	25,6	24,6	24,0	25,1	24,7
CZK / USD	annual average	23,2	21,7	23,4	22,2	23,2	21,9

Table sources: GDP, inflation, unemployment and real wages [1]; trade balance [2]; exchange rates [3, 4]. Values are rounded to one decimal place.

The Czech economy accelerated in 2025. Gross domestic product increased by 2.6% in real terms, following growth of 1.3% in 2024. The recovery was supported by domestic demand: household consumption increased by 2.7%, general government consumption by 2.2% and gross fixed capital formation by 3.1%. Changes in inventories made a positive contribution to GDP growth, while the contribution of net exports of goods and services was negative.

The industrial recovery remained uneven across sectors. According to the Czech Statistical Office's full-year assessment published in February 2026, industrial production increased by 1.5% in 2025. Growth was driven mainly by the manufacture of fabricated metal products, the energy sector, and the manufacture of rubber and plastic products. By contrast, declines were recorded, for example, in the manufacture of computers, electronic and optical products, mining and the manufacture of beverages. The value of new industrial orders increased by 3.4%, with foreign orders up 4.7% and domestic orders up 1.0%.

The average annual inflation rate was 2.5%, 0.1 percentage point higher than in 2024. Price growth therefore remained substantially lower than in 2022 and 2023. The slowdown in inflation, however, did not mean a return of prices to their pre-inflationary levels. Industrial producer prices fell by an average of 0.8% in 2025.

The general unemployment rate according to the Labour Force Survey increased from 2.6% in 2024 to 2.8% in 2025. According to the updated aggregate series of the Czech Statistical Office, the average nominal wage increased by 6.6% and, after adjusting for inflation, by 4.0% in real terms. [1] Overall labour-market developments differed from the situation in industry, where the February full-year assessment showed a 1.8% decline in the average registered number of employees.

According to the annual data set of the Czech Statistical Office available when this Report was prepared, foreign trade in goods ended with a surplus of CZK 200.2 billion, compared with CZK 220.5 billion in 2024. Exports at current prices increased by approximately 2.3% and imports by 2.9%. The data reflect revisions compared with the first published result for 2025. The positive balance of trade in goods should not be confused with the contribution of net exports to real GDP growth, which also includes services and is based on changes in volume.

The average exchange rate of the Czech koruna in 2025 was CZK 24.693 per euro and CZK 21.914 per US dollar. Compared with 2024, the koruna strengthened against both currencies on an annual average basis. For exporting companies, a stronger koruna may mean a lower CZK value of foreign revenues; at the same time, it may reduce the cost of imported inputs. The overall impact depends on the currency structure of revenues and costs and on exchange-rate hedging.

The general government sector ended 2025 with a deficit of approximately 2.1% of GDP, while government debt reached 44.2% of GDP. In 2024, the corresponding figures were 2.0% and 43.2% of GDP. Public finances therefore remained in deficit and the debt-to-GDP ratio increased further.

When assessing the conditions for the further development of the glass and ceramic industry, particular attention should be paid to energy and raw-material prices and availability, demand in export markets, the exchange rate of the koruna and labour costs. In its outlook available in August 2026, the Ministry of Finance highlighted in particular geopolitical risks, uncertainty in global trade policy and possible pressure on energy prices. These circumstances represent risks for the subsequent period and are not a description of the results for 2025.

The data and analyses that follow focus on the glass and ceramic industry as part of Czech manufacturing corresponding to the activities of companies affiliated with the Association.

Developments are monitored by individual sector so that differences in production, sales, employment and foreign trade can be captured. The macroeconomic indicators presented in this chapter provide a framework for assessing the industry; in themselves, they do not describe the performance of glass and ceramic companies.

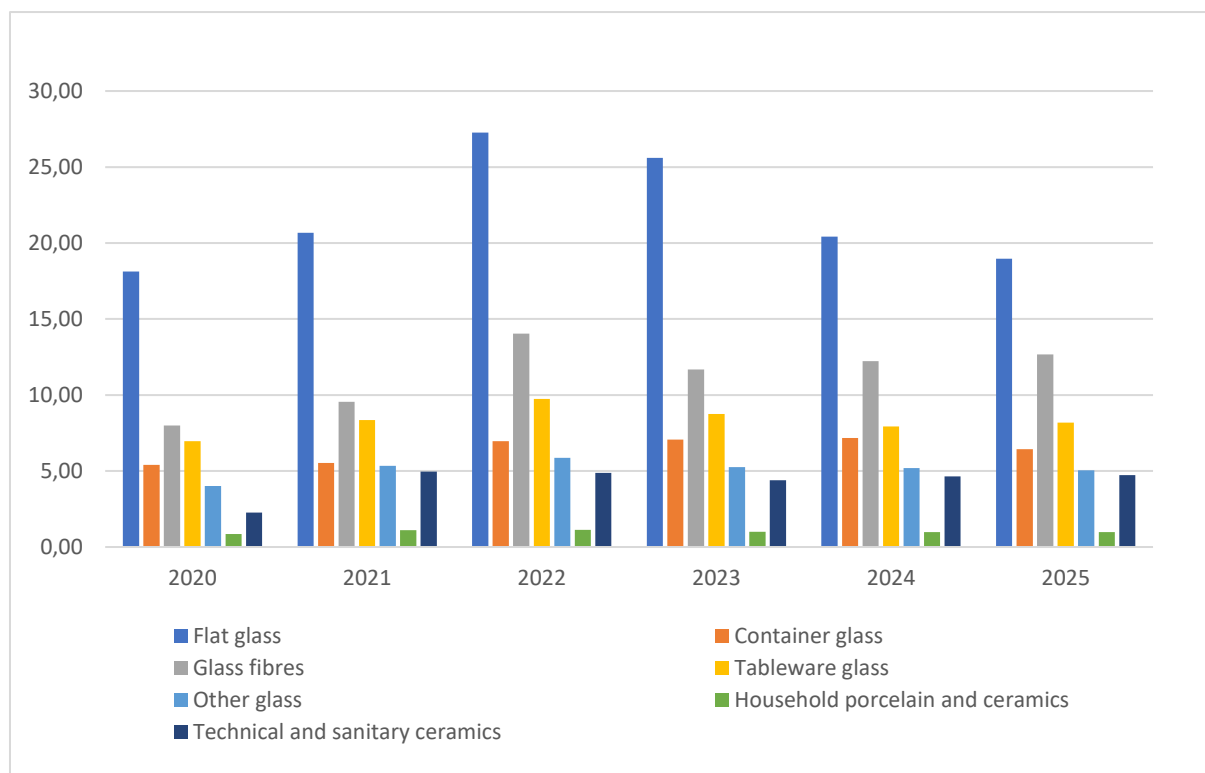
Sales of own products and services

Sales of own products and services (CZK billion)

	2020	2021	2022	2023	2024	2025	index 25/24
							(%)
Flat glass	18,13	20,68	27,26	25,60	20,42	18,96	92,9
Container glass	5,40	5,54	6,96	7,07	7,17	6,44	89,8
Glass fibres	7,99	9,56	14,03	11,67	12,22	12,67	103,7
Tableware glass	6,97	8,36	9,74	8,75	7,93	8,18	103,1
Other glass	4,02	5,34	5,86	5,26	5,20	5,04	96,9
Glass total	42,51	49,48	63,85	58,35	52,94	51,29	96,9
Household porcelain and ceramics	0,85	1,10	1,12	1,01	0,98	0,98	100,0
Technical and sanitary ceramics	2,26	4,96	4,88	4,39	4,64	4,74	102,2
Ceramics total	3,11	6,06	6,00	5,40	5,62	5,72	101,8
Glass and ceramics total	45,62	55,54	69,85	63,75	58,56	57,01	97,4

*Data affected by a change in the CZ-NACE classification of a major company in the sector between 2018 and 2019

Development of sales of own products and services (CZK billion)



In 2025, sales of own products, services and goods excluding VAT (hereinafter "sales") in the monitored sectors of the glass and ceramic industry amounted to CZK 57.01 billion. Compared with 2024, they decreased by CZK 1.55 billion, i.e. by 2.6%. The data are expressed at current prices and include companies with 50 or more employees.

Sales of the glass industry reached CZK 51.29 billion, representing a year-on-year decrease of 3.1%, or CZK 1.65 billion. Flat glass accounted for 37.0% of total glass-industry sales, glass fibres for 24.7%, tableware glass for 15.9%, container glass for 12.6% and other glass for 9.8%. Container and tableware glass, which together form the hollow-glass category, accounted for a total of 28.5% of glass-industry sales.

Sales in the monitored porcelain and ceramic sectors reached CZK 5.72 billion, 1.8% more year on year. Household porcelain and ceramics accounted for 17.1%, while technical and sanitary ceramics accounted for 82.9%.

Development of sales in individual sectors in 2025

Flat-glass sales reached CZK 18.96 billion in 2025 and decreased by 7.1% compared with 2024, i.e. by CZK 1.46 billion. This sector recorded the largest absolute decline in sales among the monitored groups of the glass industry. Its sales are influenced in particular by developments in construction and the automotive industry in both domestic and foreign markets.

The Czech construction sector recovered strongly in 2025. According to Czech Statistical Office data, construction output increased by 10.9% year on year. Building construction rose by 10.5% and civil engineering by 11.5%. The value of new construction orders at companies with 50 or more employees reached approximately CZK 425 billion and increased by 9.8% year on year. However, the outlook for further construction was not unequivocal: the indicative value of building permits issued fell by 13.3%. Construction-work prices increased by 3.0%, while labour shortages remained a significant constraint on further growth.

The automotive industry maintained a high production volume in 2025. A total of 1,445,776 passenger cars were produced in the Czech Republic, 0.5% fewer year on year. This was the second-highest result in history, and more than 92.5% of production was exported. Production of battery electric vehicles and plug-in hybrids increased by almost 89% to 285,176 vehicles, representing 19.7% of total passenger-car production. Of this number, 224,383 were battery electric vehicles and 60,793 were plug-in hybrids.

Thus, neither the recovery in domestic construction nor the high level of automotive production translated into growth in total sales of Czech flat glass. Sales data alone, however, do not make it possible to determine the extent to which the decline was due to changes in sales volumes, prices, product mix or demand in foreign markets.

Container-glass sales reached CZK 6.44 billion in 2025. Compared with CZK 7.17 billion in 2024, they decreased by approximately CZK 0.73 billion, i.e. by 10.2%. Container glass therefore recorded the

largest relative decline in sales among the monitored groups of the glass industry. Its share of total glass-industry sales was 12.6%.

By contrast, sales of tableware glass reached CZK 8.18 billion and increased by approximately CZK 0.25 billion, or 3.1%, from CZK 7.93 billion in 2024. Following the previous decline, this represented a modest year-on-year recovery. Tableware glass accounted for 15.9% of total glass-industry sales.

Combined sales of hollow glass, comprising container and tableware glass, amounted to CZK 14.62 billion. Compared with the combined total for the two sectors in 2024, they fell by approximately CZK 0.48 billion, or 3.2%. The differing developments in the two parts of the hollow-glass segment show that the overall decline was driven by container glass, while tableware glass recorded modest growth.

Sales of glass fibres and products made from them reached CZK 12.67 billion, representing year-on-year growth of 3.7%, or CZK 0.45 billion. Together with tableware glass, this was one of only two monitored glass-industry groups to record sales growth in 2025. Glass fibres accounted for 24.7% of glass-industry sales.

Sales of other glass reached CZK 5.04 billion and decreased by 3.1% year on year, or approximately CZK 0.16 billion. This group includes a wide range of products, such as technical and laboratory glass, glass tiles and bricks, and glass blanks for jewellery. The aggregate result may therefore include differing developments across individual product groups.

Sales of household porcelain and ceramics amounted to CZK 0.98 billion and remained at the 2024 level. Developments in this sector can therefore be characterised as stagnant sales at current prices. The sector accounted for 17.1% of total sales in the monitored ceramic industries.

Sales of technical and sanitary ceramics reached CZK 4.74 billion, 2.2% more year on year. This sector generated 82.9% of sales in the monitored ceramic industries and was the principal source of their overall year-on-year growth. While sales of household porcelain and ceramics stagnated, growth in technical and sanitary ceramics increased total ceramic-industry sales by CZK 0.10 billion to CZK 5.72 billion.

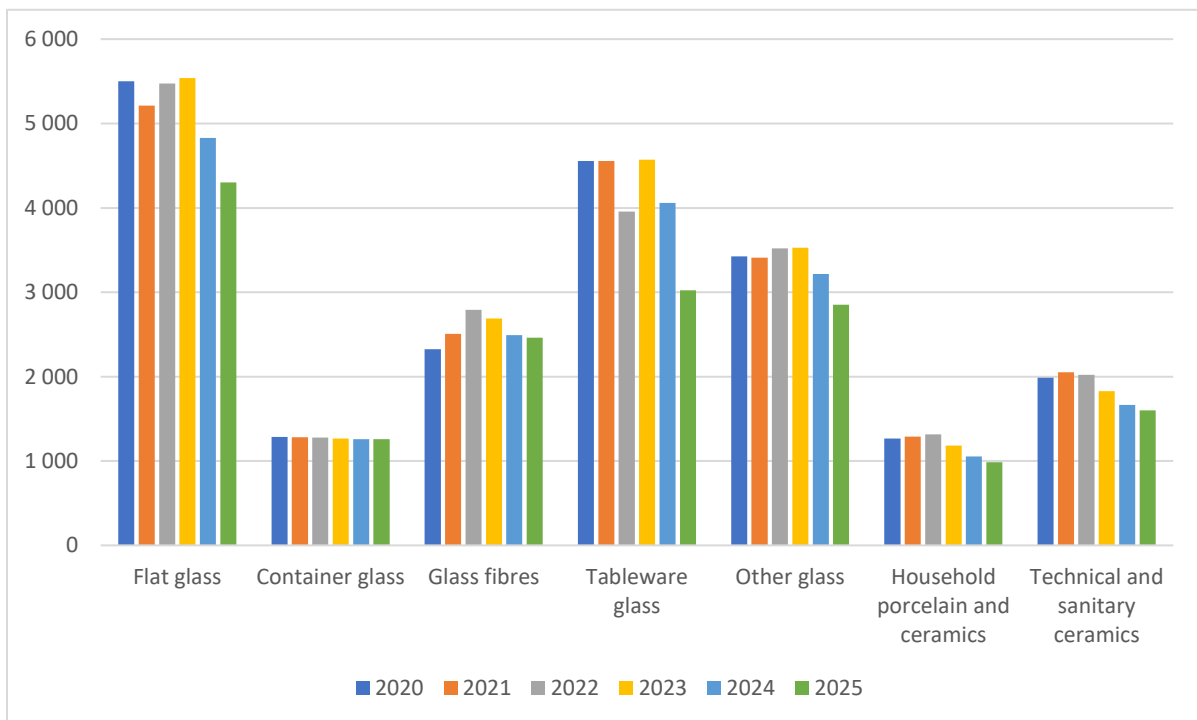
Employees

Average registered number of employees (persons)

	2020	2021	2022	2023	2024	2025	index 25/24
							(%)
Flat glass	5 501	5 211	5 473	5 540	4 830	4 300	89,0
Container glass	1 284	1 283	1 279	1 268	1 257	1 259	100,2
Glass fibres	2 326	2 506	2 792	2 689	2 492	2 460	98,7
Tableware glass	4 555	4 556	3 957	4 571	4 057	3 024	74,5
Other glass	3 425	3 411	3 519	3 526	3 217	2 852	88,7
Glass total	17 091	16 967	17 020	17 594	15 853	13 895	87,6
Household porcelain and ceramics	1 268	1 289	1 316	1 184	1 055	984	93,3
Technical and sanitary ceramics	1 987	2 051	2 022	1 829	1 665	1 600	96,1
Ceramics total	3 255	3 340	3 338	3 013	2 720	2 584	95,0
Glass and ceramics total	20 346	20 307	20 358	20 607	18 573	16 479	88,7

*Data affected by a change in the CZ-NACE classification of a major company in the sector between 2018 and 2019

Development of the average registered number of employees (persons)



The average number of employees in the monitored glass and ceramic companies with 50 or more employees totalled 16,476 in 2025. Compared with 2024, when 17,533 people worked in these companies, the number decreased by 1,057 persons, i.e. by 6.0%.

In the glass industry, the number of employees fell from 14,813 to 13,892, a decrease of 921 persons or 6.2%. In the monitored porcelain and ceramic sectors, the number fell from 2,720 to 2,584 persons, a decrease of 136 persons or 5.0%.

A total of 4,300 people worked in flat-glass production and processing in 2025, 530 fewer year on year, a decline of 11.0%. Of this total, 1,135 employees worked in flat-glass production and 3,165 in shaping and processing. Flat glass therefore recorded the largest absolute reduction in employment among the separately monitored groups of the glass industry.

A total of 4,280 people worked in hollow-glass production, including container and tableware glass, in 2025. Compared with 4,274 employees in 2024, the number increased by 6 persons, or 0.1%. Employment in this segment therefore remained virtually unchanged year on year.

A total of 1,256 people worked in container glass in 2025, compared with 1,257 employees in 2024. The number therefore fell by only one person, or approximately 0.1%. Employment in container glass can therefore be regarded as stable.

Tableware glass employed 3,024 people, 7 more than in 2024. The number of employees therefore increased by approximately 0.2% year on year. Developments in both parts of the hollow-glass segment were very similar and employment in the segment as a whole remained essentially stable.

In the manufacture of glass fibres and products made from them, employment fell from 2,492 to 2,460 persons, a decrease of 32 persons or 1.3%. Compared with other parts of the glass industry, this was a relatively modest decline.

In the production and processing of other glass, employment fell from 3,217 to 2,852 persons year on year, a decrease of 365 persons or 11.3%. After flat glass, this was the second-largest absolute reduction in employment and, at the same time, the largest relative decline among the main monitored groups of the glass industry.

A total of 984 people worked in the manufacture of household porcelain and ceramics in 2025, 71 fewer than in the previous year, a decrease of 6.7%.

In the manufacture of technical and sanitary ceramics, employment fell from 1,665 to 1,600 persons, i.e. by 65 persons or 3.9%. Of this total, 1,348 employees worked in the manufacture of sanitary and other technical ceramics and 252 in the manufacture of ceramic insulators and insulating fittings.

Overall, employment in the monitored glass and ceramic companies fell by 6.0% in 2025. Developments differed significantly among production groups. The largest reductions were concentrated in the production and processing of flat and other glass, while the decline in glass fibres was considerably milder. In hollow glass, employment remained virtually stable in both container and tableware glass.

The decline in employment was therefore not across the board, but concentrated mainly in selected parts of the glass industry. The statistical data alone, however, do not make it possible to determine

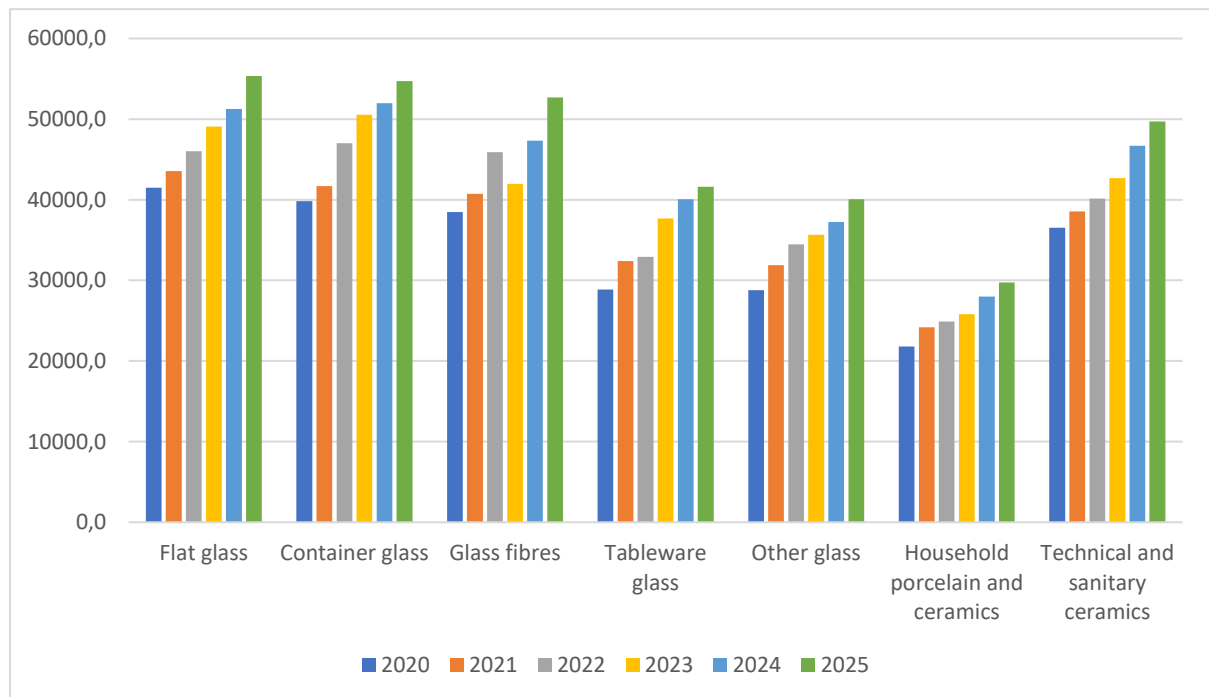
precisely the extent to which it was caused by changes in demand, production capacity and organisation, technological changes, growth in labour productivity or labour-market conditions.

Average monthly wages

Average monthly wages (CZK)

	2020	2021	2022	2023	2024	2025	index 25/24
							(%)
Flat glass	41482,0	43556,0	46010,0	49056,0	51278,0	55357,0	108,0
Container glass	39819,0	41678,0	47010,0	50540,0	51980,0	54706,0	105,2
Glass fibres	38462,0	40755,0	45893,0	41962,0	47342,0	52694,0	111,3
Tableware glass	28854,0	32414,0	32931,0	37691,0	40072,0	41600,0	103,8
Other glass	28787,0	31881,0	34479,0	35646,0	37225,0	40061,0	107,6
Household porcelain and ceramics	21811,0	24169,0	24885,0	25796,0	27997,0	29733,0	106,2
Technical and sanitary ceramics	36516,0	38541,0	40147,0	42695,0	46705,0	49722,0	106,5
Glass and ceramics total	33 676	36 142	38 765	40 484	43 228	46 268	107,0

Development of average monthly wages (CZK)



The development of average monthly wages between 2024 and 2025 shows nominal wage growth in all monitored sectors of the glass and ceramic industry. At the same time, substantial differences in remuneration levels persisted among individual production groups.

The highest average monthly wage among the monitored sectors in 2025 was recorded in flat-glass production and processing, at CZK 55,357. Compared with 2024, when it was CZK 51,278, it increased by 8.0%.

The second-highest average wage was recorded in container glass, where it reached CZK 54,706. Compared with 2024, when it was CZK 51,980, it increased by 5.2%.

In the manufacture of glass fibres and products made from them, the average monthly wage reached CZK 52,694, representing a year-on-year increase of 11.3% from CZK 47,342 in 2024. This was the highest percentage wage growth among the monitored production groups.

Wages in flat glass, container glass and glass-fibre production exceeded the full-year average wage in the Czech Republic, which amounted to CZK 49,215 in 2025. The average wage in the technical and sanitary ceramics group was also above the national average, reaching CZK 49,722 and increasing by 6.5% year on year.

In tableware glass, the average monthly wage was CZK 41,600. Compared with 2024, when it was CZK 40,072, it increased by 3.8%. Nevertheless, it remained approximately CZK 7.6 thousand below the national average. The difference between wage levels in container and tableware glass also remained substantial in 2025 - the average wage in container glass was approximately CZK 13.1 thousand higher.

In the other-glass group, the average monthly wage reached CZK 40,061, representing a year-on-year increase of 7.6% from CZK 37,225. This group comprises diverse production activities, so the aggregate figure may conceal different wage levels in individual product segments.

The lowest average wage among the monitored sectors remained in the manufacture of household porcelain and ceramics. In 2025, it amounted to CZK 29,733 and increased by 6.2% compared with 2024. It therefore continued to lag substantially behind the national average.

The 2025 data confirm continued growth in nominal wages across the monitored glass and ceramic industry as a whole, while also showing substantial differences among individual production groups. The average wage in the highest-paying sectors - flat and container glass - exceeded CZK 54 thousand, while in household porcelain and ceramics it remained below CZK 30 thousand.

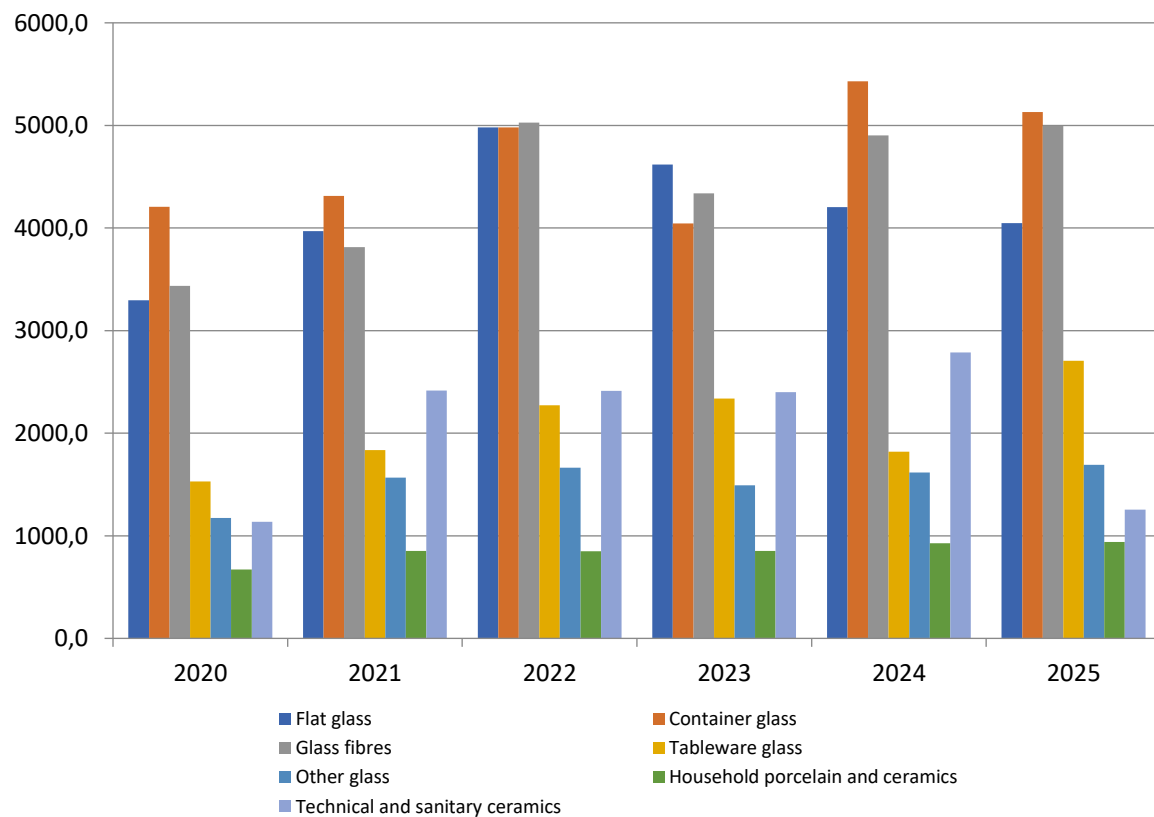
The statistical data alone do not make it possible to determine the extent to which differences in wage levels are influenced by the technological complexity of production, the degree of automation, the qualification structure of employees, the share of manual work, regional conditions or the economic situation of individual companies.

Labour productivity

Labour productivity from sales at current prices (CZK thousand/employee)

	2020	2021	2022	2023	2024	2025	index 25/24
							(%)
Flat glass	3296,0	3969,0	4981,0	4620,0	4204,0	4047,0	96,3
Container glass	4207,0	4314,0	4981,0	4044,0	5431,0	5129,0	94,4
Glass fibres	3437,0	3815,0	5027,0	4338,0	4904,0	4996,0	101,9
Tableware glass	1530,0	1835,0	2271,0	2338,0	1820,0	2705,0	148,6
Other glass	1173,0	1567,0	1664,0	1493,0	1617,0	1693,0	104,7
Household porcelain and ceramics	670,0	852,0	849,0	853,0	927,0	941,0	101,5
Technical and sanitary ceramics	1137,0	2417,0	2414,0	2400,0	2786,0	1254,0	45,0
Glass and ceramics total	2 207	2 681	3 170	2 869	3 098	2 966	95,7

Development of labour productivity from sales at current prices (CZK thousand/employee)



Developments in sales, employee numbers and the nature of production are reflected in labour productivity from sales, expressed as annual sales per employee at current prices. According to the data in the table, average labour productivity in the monitored sectors of the glass and ceramic industry reached CZK 2,966 thousand per employee in 2025. Compared with 2024, when it amounted to CZK 3,098 thousand per employee, it decreased by approximately 4.3%.

The highest labour productivity in 2025 was recorded in container glass, at CZK 5,129 thousand per employee. Compared with 2024, when it stood at CZK 5,431 thousand, it nevertheless decreased by 5.6%.

In the manufacture of glass fibres and products made from them, productivity reached CZK 4,996 thousand per employee, 1.9% more year on year. This was the second-highest value among the monitored production groups.

In flat-glass production and processing, productivity fell year on year from CZK 4,204 thousand to CZK 4,047 thousand per employee, a decrease of 3.7%.

A significant year-on-year increase was recorded in tableware glass. Productivity rose from CZK 1,820 thousand per employee in 2024 to CZK 2,705 thousand in 2025, an increase of 48.6%. This was the largest relative increase in productivity among all monitored groups.

In the other-glass group, productivity increased from CZK 1,617 thousand to CZK 1,693 thousand per employee, representing year-on-year growth of 4.7%.

In the manufacture of household porcelain and ceramics, labour productivity reached CZK 941 thousand per employee, compared with CZK 927 thousand in 2024. It therefore increased by 1.5% year on year, but remained the lowest among the monitored production groups.

A different development was recorded in technical and sanitary ceramics, where productivity fell from CZK 2,786 thousand per employee in 2024 to CZK 1,254 thousand in 2025, a decrease of 55.0%. This was the largest year-on-year decline among all monitored sectors.

Labour-productivity developments therefore differed substantially among sectors in 2025. While tableware glass recorded a very significant increase and modest growth was also recorded in glass fibres, other glass and household porcelain and ceramics, productivity in flat and container glass decreased year on year. Technical and sanitary ceramics recorded an exceptionally large decline.

The labour-productivity indicator cannot in itself be interpreted solely as a measure of workforce efficiency. Its development is influenced simultaneously by changes in sales, employee numbers, the price level, production structure and the share of products with different levels of value added. Significant year-on-year changes in some sectors therefore also need to be assessed in the context of sales and employment developments.

Exports

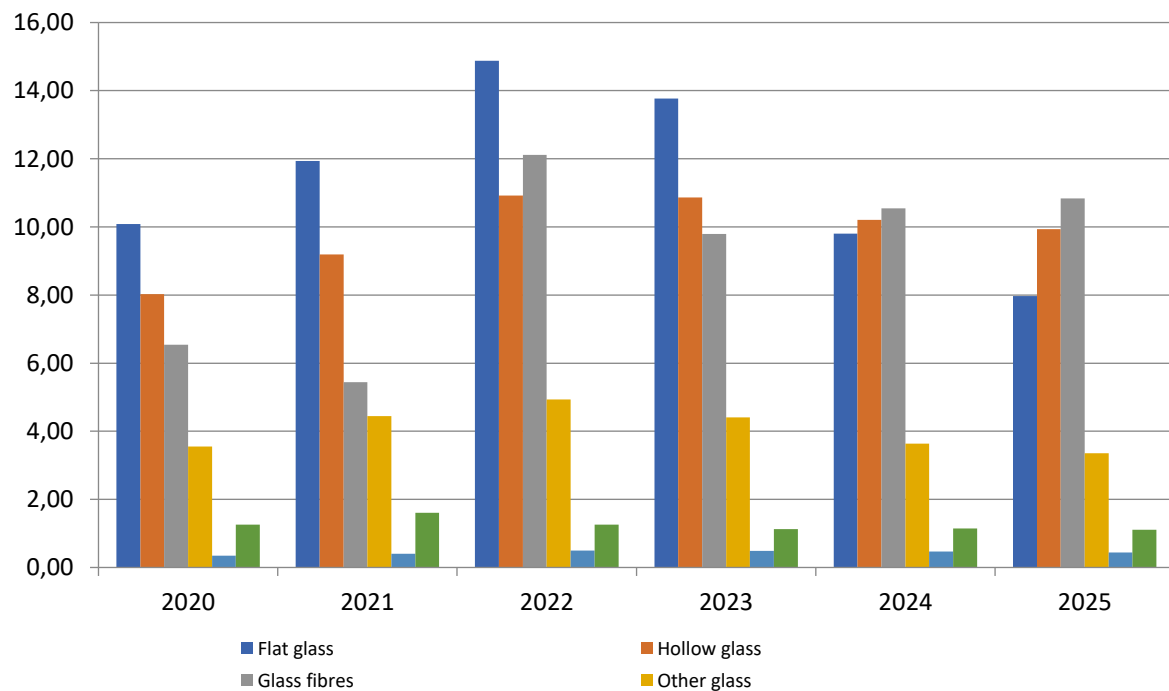
Exports are presented below as sales from direct exports at current prices (hereinafter "direct exports") and as total exports (direct exports plus indirect exports).

The following table shows the development of direct exports. The hollow-glass production sector includes tableware and container glass. Owing to the statistical reporting methodology, hollow glass cannot be broken down into these individual production sectors.

Direct exports (CZK billion)

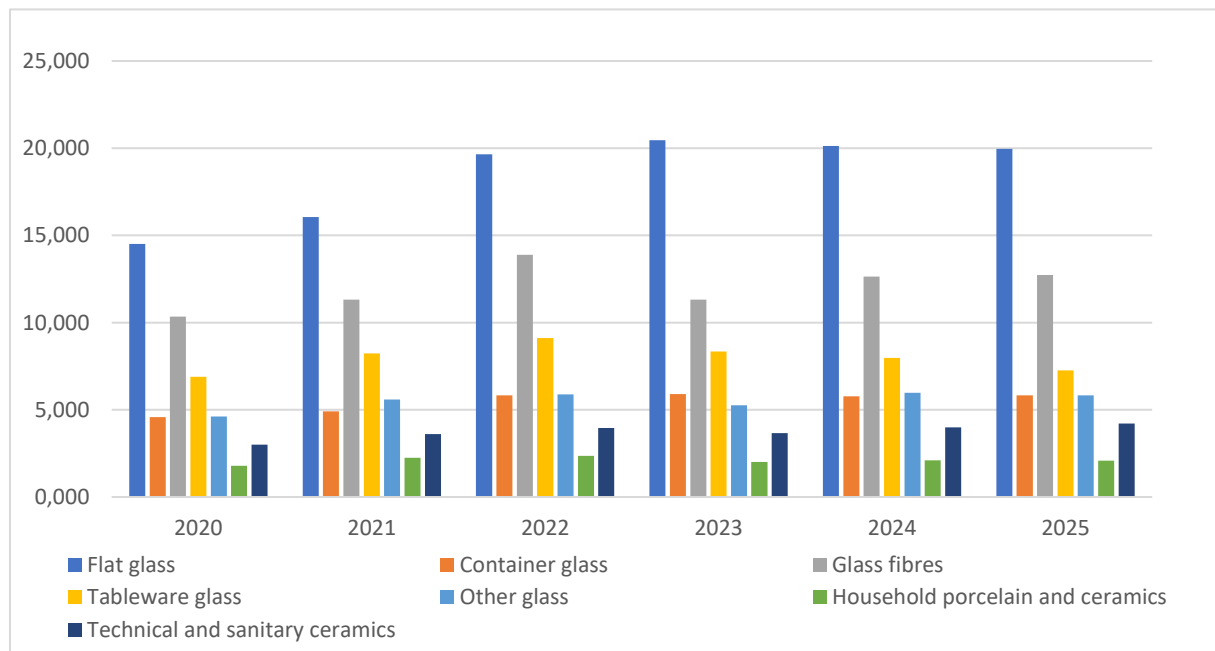
	2020	2021	2022	2023	2024	2025	index 25/24
							(%)
Flat glass	10,08	11,94	14,88	13,77	9,80	7,97	81,3
Hollow glass	8,03	9,19	10,92	10,86	10,21	9,93	97,3
Glass fibres	6,54	5,44	12,11	9,79	10,54	10,84	102,8
Other glass	3,55	4,44	4,93	4,41	3,64	3,35	92,0
Glass total	28,20	31,01	42,84	38,83	34,19	32,09	93,9
Household porcelain and ceramics	0,35	0,40	0,50	0,49	0,47	0,44	93,6
Technical and sanitary ceramics	1,26	1,61	1,26	1,13	1,15	1,11	96,5
Ceramics total	1,61	2,01	1,76	1,62	1,62	1,55	95,7
Glass and ceramics total	29,81	33,02	44,60	40,45	35,81	33,64	93,9

Development of direct exports (CZK billion)



Exports (CZK billion)

	2020	2021	2022	2023	2024	2025	index 25/24 (%)
Flat glass	14,505	16,049	19,644	20,467	20,137	19,957	99,1
Container glass	4,577	4,910	5,827	5,902	5,777	5,830	100,9
Glass fibres	10,348	11,309	13,882	11,326	12,646	12,734	100,7
Tableware glass	6,891	8,230	9,121	8,341	7,983	7,268	91,0
Other glass	4,612	5,597	5,879	5,253	5,979	5,822	97,4
Glass total	40,933	46,095	54,353	51,289	52,522	51,611	98,3
Household porcelain and ceramics	1,793	2,258	2,353	2,013	2,094	2,086	99,6
Technical and sanitary ceramics	2,998	3,614	3,965	3,661	4,001	4,217	105,4
Ceramics total	4,791	5,872	6,318	5,674	6,095	6,303	103,4
Glass and ceramics total	45,724	51,967	60,671	56,963	58,617	57,914	98,8

Development of exports (CZK billion)

The Czech glass and ceramic industry is strongly export-oriented, and its development is therefore closely linked to the economic situation in foreign markets. The European Union remains the most important market; according to the territorial breakdown, approximately 77.6% of exports from the monitored production sectors went to EU Member States in 2025.

After a slight decline in 2020, exports grew strongly in 2021 and 2022. A year-on-year decrease of 6.1% followed in 2023, while exports increased by 2.9% in 2024. In 2025, total exports of the monitored glass and ceramic products reached CZK 57.91 billion, representing a year-on-year decrease of 1.2%. Glass exports fell by 1.7% to CZK 51.61 billion, while exports of the monitored porcelain and ceramic sectors increased by 3.4% to CZK 6.30 billion.

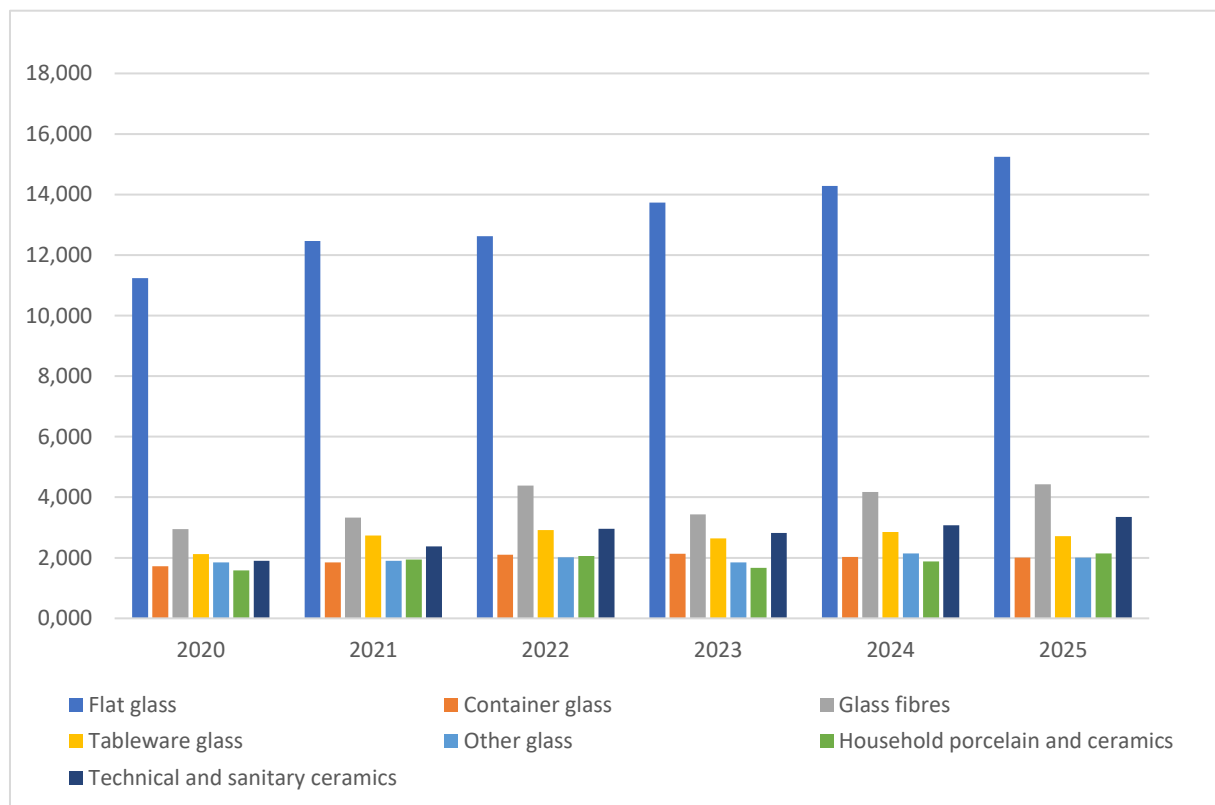
The development of exports and imports in individual production sectors in 2025 is presented in detail in Chapter 5, which analyses foreign trade in the glass and ceramic industry.

Imports

Imports (CZK billion)

	2020	2021	2022	2023	2024	2025	index 25/24
							(%)
Flat glass	11,243	12,466	12,626	13,729	14,282	15,246	106,7
Container glass	1,719	1,849	2,098	2,137	2,024	2,007	99,2
Glass fibres	2,945	3,332	4,388	3,437	4,170	4,427	106,2
Tableware glass	2,123	2,736	2,918	2,637	2,848	2,711	95,2
Other glass	1,848	1,906	2,014	1,852	2,146	2,008	93,6
Glass total	19,878	22,289	24,044	23,792	25,470	26,399	103,6
Household porcelain and ceramics	1,582	1,938	2,058	1,665	1,876	2,139	114,0
Technical and sanitary ceramics	1,902	2,379	2,954	2,826	3,074	3,347	108,9
Ceramics total	3,484	4,317	5,012	4,491	4,950	5,486	110,8
Glass and ceramics total	25,899	22,968	26,606	29,057	28,282	30,419	107,6

Development of imports (CZK billion)



After declining in 2020, imports of glass and ceramic industry products increased in 2021 and 2022. In 2023, they fell by approximately 2.7% year on year, but increased again in 2024, by 7.6%. Growth

continued in 2025, when total imports in the monitored production sectors reached CZK 31.88 billion, representing a year-on-year increase of 4.8%.

Developments differed among sectors. Glass imports increased by 3.6% to CZK 26.40 billion, while imports in the monitored porcelain and ceramic sectors increased by 10.8% to CZK 5.49 billion. The largest relative increase was recorded in imports of household porcelain and ceramics, at 14.0%. By contrast, imports of container, tableware and other glass decreased year on year.

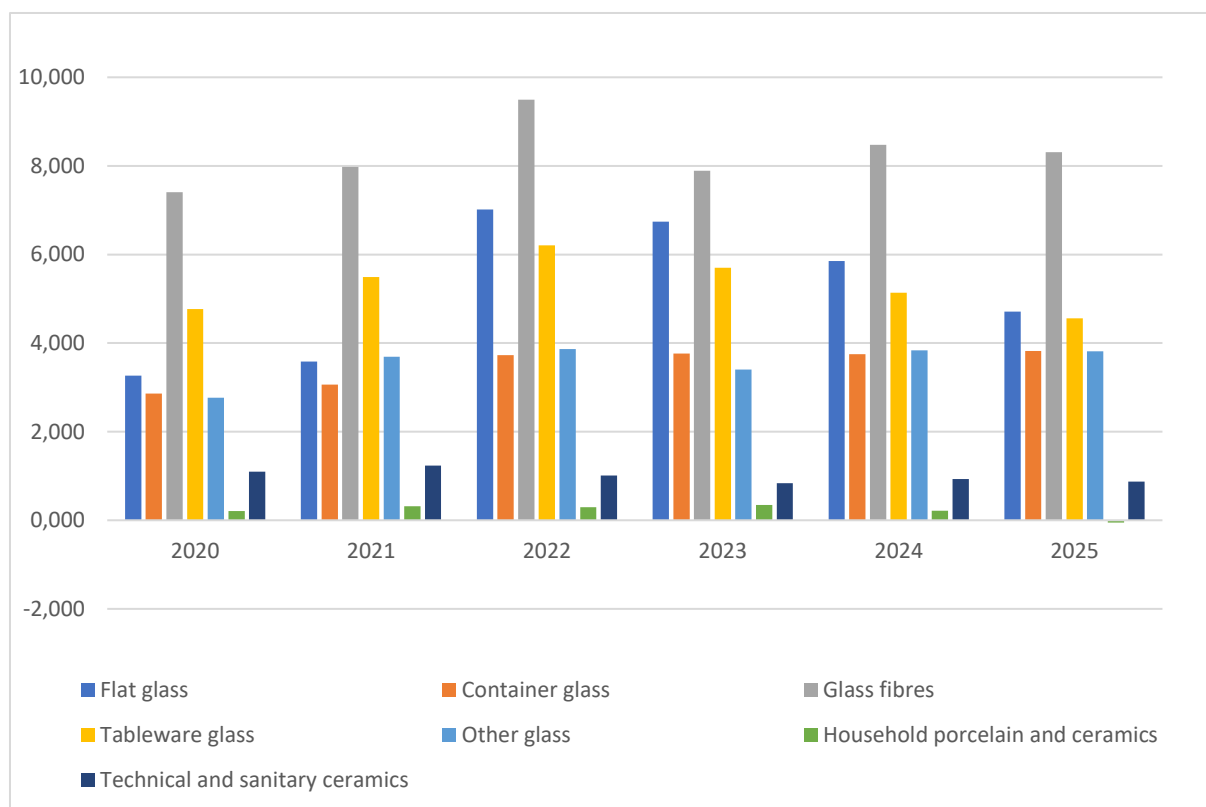
The development of imports in individual production sectors in 2025 is presented in detail in Chapter 5.

Foreign trade balance

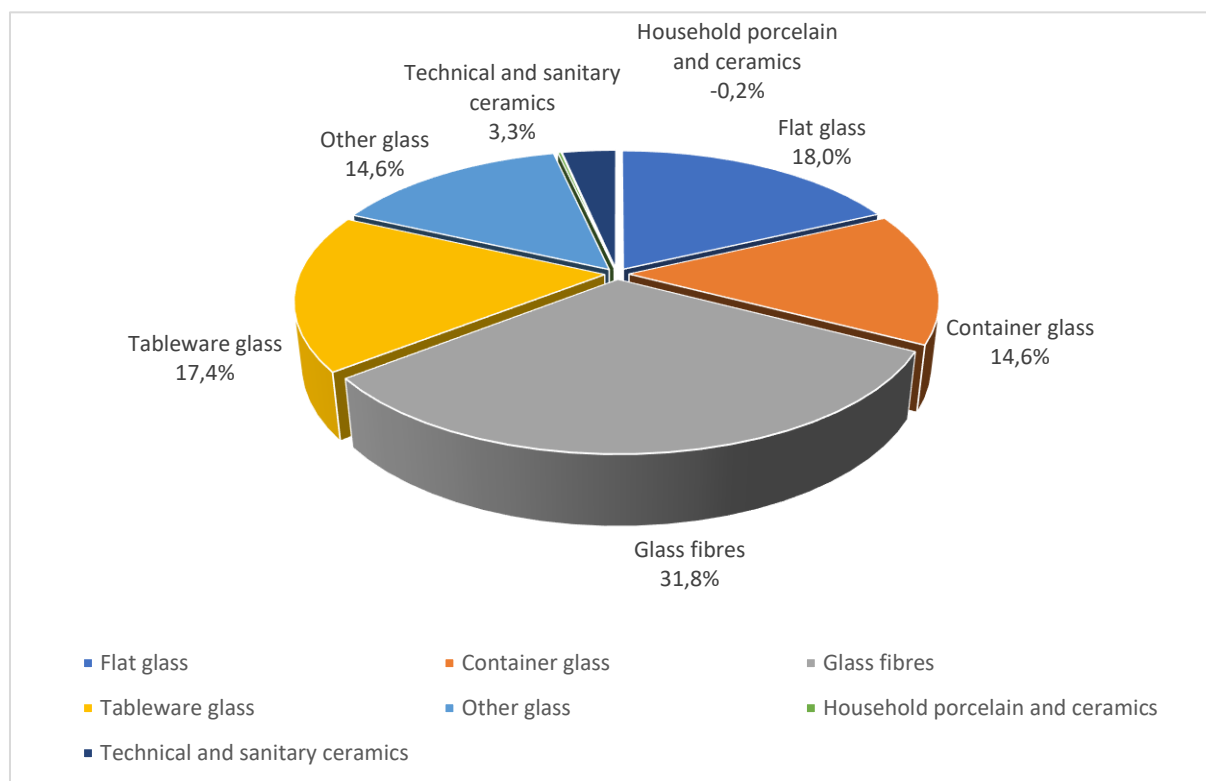
Foreign trade balance (CZK billion)

	2020	2021	2022	2023	2024	2025	index 25/24
							(%)
Flat glass	3,262	3,584	7,018	6,738	5,855	4,711	80,5
Container glass	2,858	3,061	3,728	3,765	3,753	3,823	101,9
Glass fibres	7,403	7,977	9,493	7,889	8,476	8,307	98,0
Tableware glass	4,768	5,494	6,203	5,704	5,135	4,557	88,7
Other glass	2,764	3,691	3,865	3,402	3,833	3,814	99,5
Glass total	17,230	19,188	30,307	27,498	27,052	25,212	93,2
Household porcelain and ceramics	0,212	0,320	0,295	0,348	0,218	-0,052	-23,9
Technical and sanitary ceramics	1,096	1,235	1,010	0,835	0,928	0,870	93,8
Ceramics total	2,023	3,711	1,305	1,183	1,146	0,818	71,4
Glass and ceramics total	19,252	22,899	31,612	28,681	28,198	26,030	92,3

Development of the foreign trade balance (CZK billion)



Structure of the foreign trade balance



The glass and ceramic industry recorded a positive foreign trade balance throughout the monitored period 2020-2025 and thus contributed to the foreign trade surplus of Czech manufacturing. The long-term excess of exports over imports confirms the industry's strong export orientation. In 2025, the balance reached CZK 26.03 billion, representing a decrease of CZK 2.17 billion, or 7.7%, compared with 2024. The reduction in the surplus was due to the combination of declining exports and growing imports.

Effective domestic demand

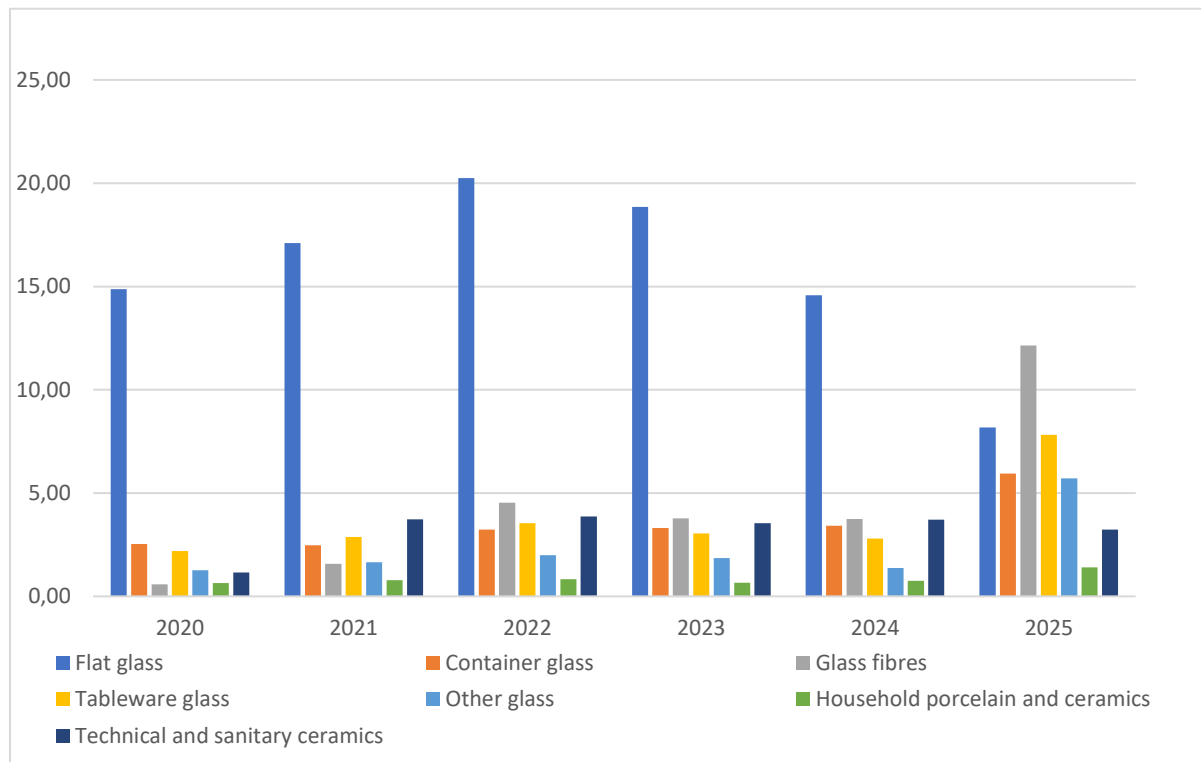
The effective domestic demand indicator is defined by the formula:

(Sales from industrial activity + Imports - Exports)

Effective domestic demand (CZK billion)

	2020	2021	2022	2023	2024	2025
Flat glass	14,87	17,10	20,24	18,86	14,57	8,18
Container glass	2,54	2,48	3,23	3,31	3,42	5,95
Glass fibres	0,59	1,58	4,54	3,78	3,74	12,14
Tableware glass	2,20	2,87	3,54	3,05	2,80	7,82
Other glass	1,26	1,65	1,99	1,86	1,37	5,71
Household porcelain and ceramics	0,64	0,78	0,83	0,66	0,76	1,41
Technical and sanitary ceramics	1,16	3,73	3,87	3,55	3,71	3,23

Development of effective domestic demand (CZK billion)



The development of effective domestic demand differs and has specific characteristics across the individual sectors of the glass and ceramic industry.

Forecast of developments in the main macroeconomic indicators

(Ministry of Finance, August 2026)

		2024	2025	2026
Gross domestic product	growth in %, constant prices	1,3	2,6	1,9
Average inflation rate	%	2,4	2,5	2,2
Unemployment rate (LFS)*	average in %	2,6	2,8	3
Wages and salaries	growth in %, current prices	6,1	7,3	7,8
CZK / EUR	annual average	25,1	24,7	24,3

Global economic growth continued in 2025 despite heightened geopolitical uncertainty and changes in international trade policy. According to the International Monetary Fund's January 2026 estimate, it reached 3.3%. The global economy demonstrated resilience, although developments remained uneven. A major source of uncertainty was the introduction of US tariffs and changes in trade relations, which complicated production, investment and export planning. Source: IMF, January 2026

The euro-area economy grew by 1.4% in 2025, an acceleration compared with the previous year but still only a modest recovery. After two years of contraction, the German economy recorded growth of 0.2%. Given the close links between Czech and German industry, the weak momentum of this important export market continued to represent an unfavourable condition for Czech manufacturers. Sources: Eurostat, Destatis

For the Czech glass and ceramic industry, this environment meant continued pressure on competitiveness and economic performance. The energy intensity of production, labour costs and limited scope to pass costs through to final-product prices remained important factors affecting profitability. The impacts differed according to the nature of production, the energy intensity of individual operations and demand developments in their principal markets. At the same time, the industry's export orientation increased its sensitivity to changes in foreign demand and trading conditions.

Europe, and in particular the Member States of the European Union, remained the most important export territory for the Czech glass and ceramic industry in 2025. According to the processed foreign-trade data, exports of the products monitored amounted to CZK 57.91 billion and decreased by 1.2% year on year. Developments differed by sector: exports of glass products fell by 1.7%, while exports of porcelain and ceramics increased by 3.4%. These results show that the modest recovery of the European economy did not bring a broad-based improvement in sales across the industry.

Further developments will continue to depend crucially on demand in downstream sectors, particularly construction, the automotive industry and consumer goods. The availability of energy at predictable and internationally comparable prices is also a key condition for competitiveness. In addition to cost developments, manufacturers must take into account competitive pressure from

foreign suppliers, changes in customer requirements and the risks associated with dependence on a limited number of markets.

For the Czech glass and ceramic industry, 2025 thus represented another period of adapting production and business strategies to changing conditions. The industry's results underline the importance of innovation, energy and material savings, automation and the development of higher value-added products. Strengthening business relationships, seeking new markets and developing services that complement manufacturing will also be important for maintaining long-term competitiveness.



DEVELOPMENT OF EXPORTS AND IMPORTS BY PRODUCTION SECTOR IN 2020–2025

Exports

The following section monitors exports of glass and ceramic industry products according to customs tariff codes, i.e. total exports from the Czech Republic, not only direct exports.

Flat glass

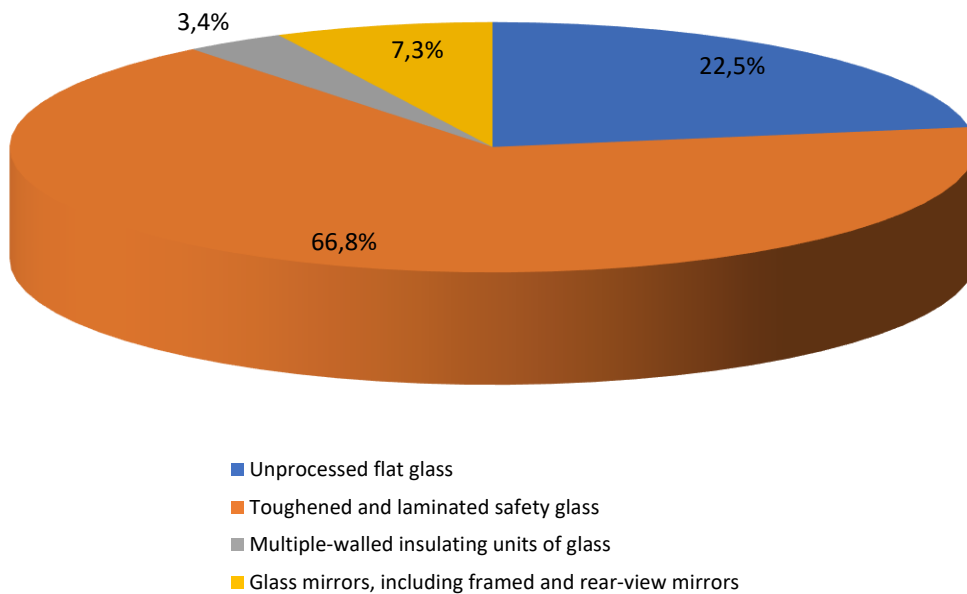
Flat-glass exports in 2025 amounted to CZK 19,956.9 million. Exports decreased compared with 2024.

Flat-glass exports by product range

	2020			2021			2022		
	Net	CZK	share	Net	CZK	share	Net	CZK	share
	(t)	million	(%)	(t)	million	(%)	(t)	million	(%)
Unprocessed flat glass	303 597,1	3 172,2	21,9	316 864,3	3 812,0	23,8	353 265,5	6 087,4	31,0
Toughened and laminated safety glass	129 714,4	9 039,9	62,3	132 812,8	9 585,6	59,7	149 008,6	11 025,6	56,1
Multiple-walled insulating units of glass	17 846,5	697,4	4,8	17 968,3	728,9	4,5	13 181,2	712,5	3,6
Glass mirrors, including framed and rear-view mirrors	51 836,9	1 595,4	11,0	56 073,9	1 922,8	12,0	46 183,6	1 818,6	9,3
Total	502 994,9	14 504,9	100,0	523 719,3	16 049,3	100,0	561 638,9	19 644,1	100,0

	2023			2024			2025		
	Net	CZK	share	Net	CZK	share	Net	CZK	share
	(t)	million	(%)	(t)	million	(%)	(t)	million	(%)
Unprocessed flat glass	322 745,7	5 193,5	25,4	296 377,6	4 471,0	22,2	296 523,0	4 482,2	22,5
Toughened and laminated safety glass	148 987,6	13 036,1	63,7	138 831,4	13 529,6	67,2	120 364,6	13 340,5	66,8
Multiple-walled insulating units of glass	107 444,1	623,8	3,0	10 038,2	597,5	3,0	12 153,3	672,3	3,4
Glass mirrors, including framed and rear-view mirrors	37 025,5	1 613,7	7,9	32 238,6	1 538,7	7,6	31 215,0	1 461,9	7,3
Total	616 202,9	20 467,1	100,0	477 485,8	20 136,8	100,0	460 255,9	19 956,9	100,0

Structure of flat-glass exports by product range in 2025 (CZK)



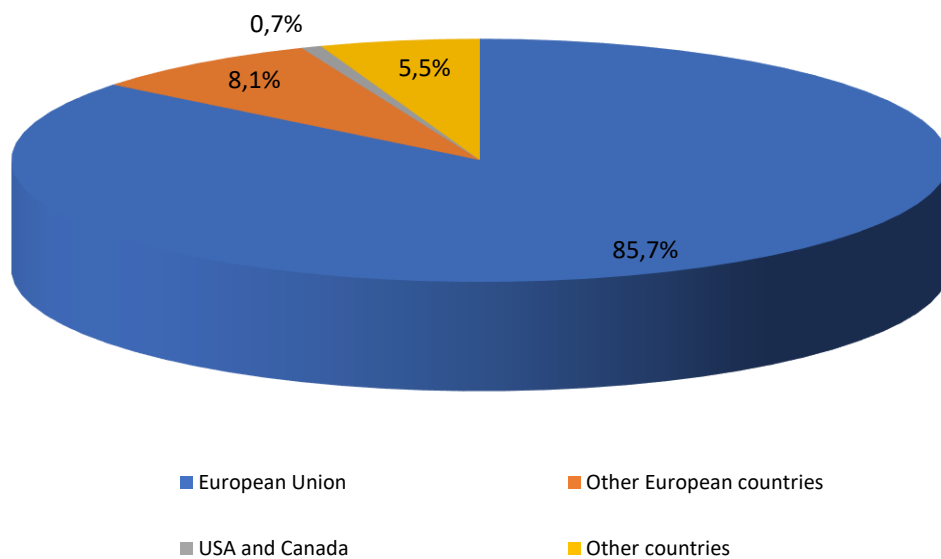
In terms of physical units, unprocessed flat glass accounted for the largest share of exports in 2025 (64.4%; 67% of this was float glass), followed by safety glass at 26.2%. In terms of export value in CZK, the situation was the reverse. Safety glass accounted for the largest share at 66.8%, while unprocessed flat glass accounted for 22.5%.

Flat-glass exports by territory

	2020			2021			2022		
	Net	CZK million	share	Net	CZK million	share	Net	CZK million	share
	(t)		(%)	(t)		(%)	(t)		(%)
European Union	455 035,5	12 902,5	89,0	465 318,2	14 441,8	90,0	496 481,3	17 953,2	91,4
Other European countries	23 724,3	1 252,3	8,6	24 062,2	521,6	3,3	24 507,5	682,3	3,5
USA and Canada	2 043,3	47,3	0,3	1 357,4	55,5	0,3	813,9	45,7	0,2
Other countries	22 191,7	302,9	2,1	32 981,5	1 030,3	6,4	39 836,2	962,8	4,9
Total	502 994,8	14 505,0	100,0	523 719,3	16 049,2	100,0	561 638,9	19 644,0	100,0

	2023			2024			2025		
	Net	CZK million	share	Net	CZK million	share	Net	CZK million	share
	(t)		(%)	(t)		(%)	(t)		(%)
European Union	451 428,8	17 494,5	85,5	411 130,4	16 856,0	83,7	398 856,6	17 096,3	85,7
Other European countries	32 036,9	1 782,9	8,7	32 814,3	1 910,5	9,5	28 842,1	1 615,5	8,1
USA and Canada	976,1	63,7	0,3	1 283,5	89,9	0,4	1 418,0	140,9	0,7
Other countries	35 061,0	1 126,0	5,5	32 257,6	1 280,4	6,4	31 139,2	1 104,2	5,5
Total	519 502,8	20 467,1	100,0	477 485,8	20 136,8	100,0	460 255,9	19 956,9	100,0

Structure of flat-glass exports by territory in 2025 (CZK)



A substantial share of flat-glass exports goes to European Union countries. In 2025, the EU accounted for 85.7% of exports. The largest customers were Germany, Italy, France, Spain and Poland. The largest customers outside the European Union included the United Kingdom, the United States, Switzerland, and Bosnia and Herzegovina.

The structure of exports reflects the end uses of flat-glass products (predominantly in construction and the automotive industry) as well as the production and business strategies of individual companies.

Container glass

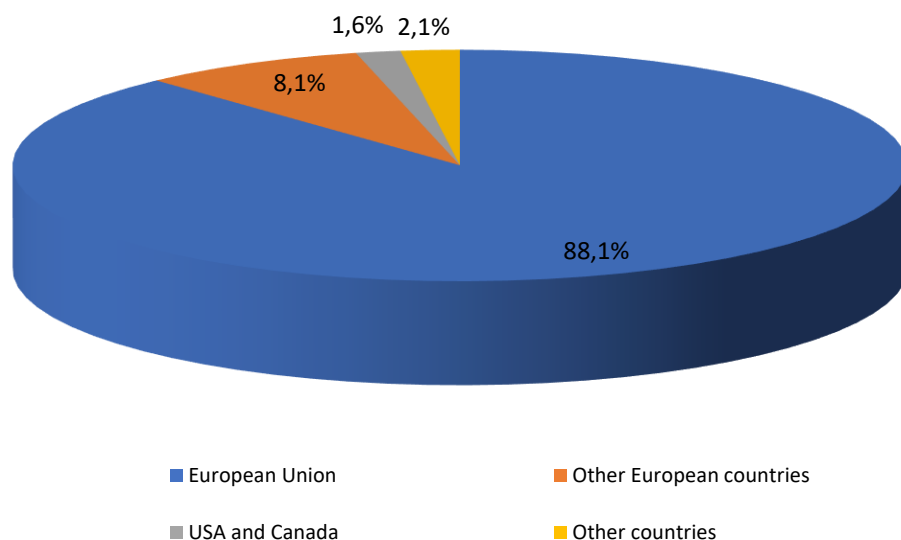
Container-glass exports in 2025 amounted to CZK 5,829.8 million. Exports increased compared with 2024.

Container-glass exports by territory

	2020			2021			2022		
	Net	CZK million	share	Net	CZK million	share	Net	CZK million	share
	(t)		(%)	(t)		(%)	(t)		(%)
European Union	306 463,1	4 089,4	89,3	325 804,1	4 372,6	89,1	338 856,7	5 155,9	88,5
Other European countries	17 235,7	329,0	7,2	16 278,8	247,1	5,0	22 280,1	407,3	7,0
USA and Canada	2 199,2	69,4	1,5	3 617,9	132,1	2,7	3 111,3	139,3	2,4
Other countries	4 177,2	89,3	2,0	3 779,2	158,1	3,2	2 910,4	124,2	2,1
Total	330 075,2	4 577,0	100,0	349 480,0	4 909,9	100,0	367 158,4	5 826,7	100,0

	2023			2024			2025		
	Net	CZK million	share	Net	CZK million	share	Net	CZK million	share
	(t)		(%)	(t)		(%)	(t)		(%)
European Union	302 868,3	5 188,0	87,9	291 118,4	5 046,2	87,3	308 358,1	5 136,5	88,1
Other European countries	21 814,0	477,9	8,1	23 165,5	528,6	9,1	21 862,7	475,1	8,1
USA and Canada	2 737,5	132,4	2,2	1 933,2	99,9	1,7	2 075,4	94,1	1,6
Other countries	2 087,6	103,4	1,8	2 775,0	102,7	1,8	2 768,8	124,1	2,1
Total	329 507,4	5 901,7	100,0	318 992,1	5 777,4	100,0	335 065,0	5 829,8	100,0

Structure of container-glass exports by territory in 2025 (CZK)



Exports are determined by the nature of the use of a substantial part of the container-glass product range. It is not economical to transport bottles and preserving jars over long distances. In 2025, 88.1% of exports were destined for European Union countries. The largest customers were Germany, Poland, Austria, Italy and the Netherlands. Other European countries accounted for 8.1% of exports, with Switzerland and Russia being the largest customers in this group.

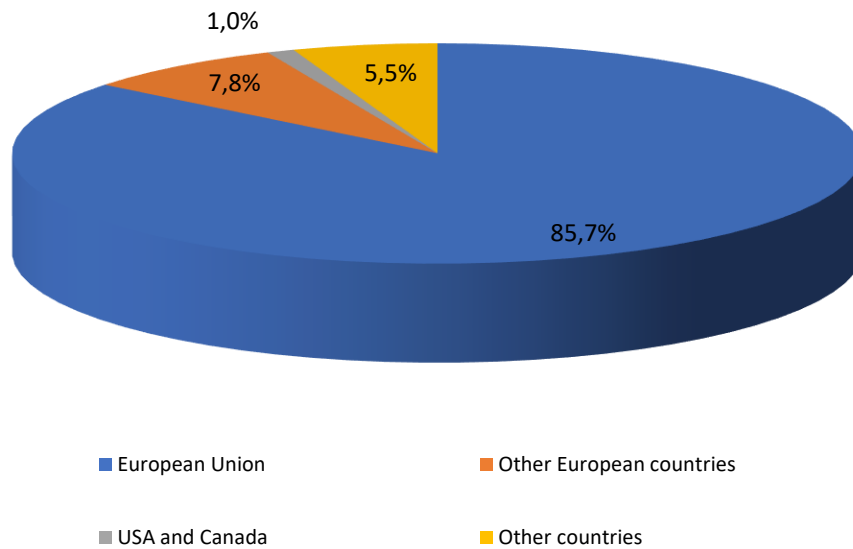
Glass fibres and products made from them

Exports of glass fibres and products made from them amounted to CZK 12,734.0 million in 2025. Exports increased compared with 2024.

Exports of glass fibres and products made from them by territory

	2020			2021			2022		
	Net	CZK million	share	Net	CZK million	share	Net	CZK million	share
	(t)		(%)	(t)		(%)	(t)		(%)
European Union	183 474,9	9 213,8	89,0	198 037,3	10 204,0	90,2	199 126,3	12 540,3	90,3
Other European countries	10 821,9	483,8	4,7	8 763,9	444,4	3,9	10 218,4	498,1	3,6
USA and Canada	1 077,2	85,2	0,8	2 498,3	81,1	0,7	2 124,4	135,5	1,0
Other countries	7 845,4	565,2	5,5	8 371,1	579,3	5,1	8 865,1	707,6	5,1
Total	203 219,4	10 348,0	100,0	217 670,6	11 308,7	100,0	220 334,2	13 881,5	100,0

	2023			2024			2025		
	Net	CZK million	share	Net	CZK million	share	Net	CZK million	share
	(t)		(%)	(t)		(%)	(t)		(%)
European Union	145 571,4	9 549,1	84,3	186 012,2	10 715,9	84,7	160 806,3	10 911,8	85,7
Other European countries	16 015,4	999,5	8,8	16 859,4	1 136,9	9,0	10 648,3	987,4	7,8
USA and Canada	1 248,9	116,0	1,0	1 953,7	111,5	0,9	1 197,7	133,0	1,0
Other countries	7 015,1	661,6	5,8	6 865,0	681,5	5,4	7 465,6	701,8	5,5
Total	169 850,8	11 326,1	100,0	211 690,3	12 645,8	100,0	180 117,9	12 734,0	100,0

Structure of exports of glass fibres and products made from them by territory in 2025 (CZK)

A substantial share of exports (85.7%) was destined for European Union countries. The largest customers in 2025 were Germany, Poland, France, Slovakia, Italy and Austria. Outside the European

Union, the largest customers were the United Kingdom, Serbia, Switzerland, Ukraine and the United States.

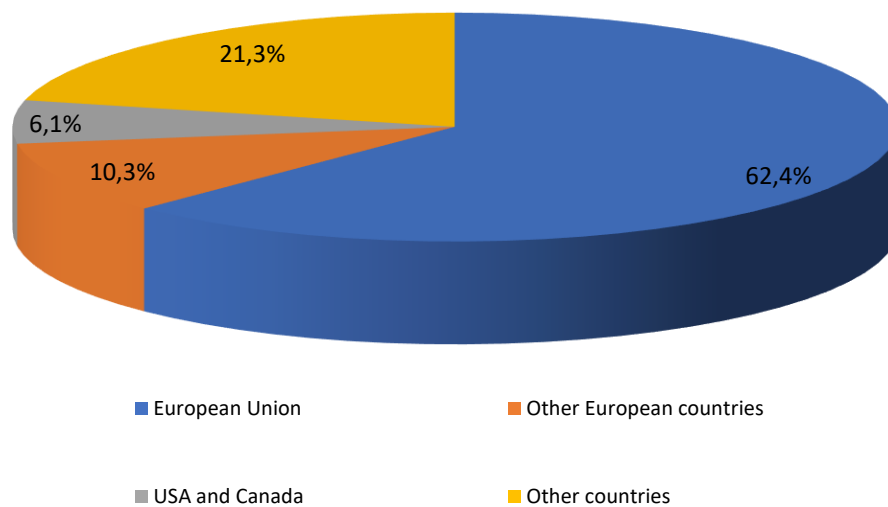
Tableware glass

Tableware glass exports are one of the traditional export sectors of Czech manufacturing. In 2025, exports amounted to CZK 7,268.0 million. Exports decreased compared with 2024.

	2020			2021			2022		
	Net	CZK	share	Net	CZK	share	Net	CZK	share
	(t)	million	(%)	(t)	million	(%)	(t)	million	(%)
European Union	63 036,8	4 618,6	67,0	58 366,3	5 379,6	65,4	59 645,0	6 032,2	66,1
Other European countries	6 954,8	654,6	9,5	7 515,8	740,1	9,0	4 196,2	550,8	6,0
USA and Canada	3 248,8	386,0	5,6	5 079,8	603,3	7,3	4 437,5	792,2	8,7
Other countries	10 426,1	1 231,8	17,9	12 997,0	1 506,6	18,3	12 382,1	1 745,4	19,1
Total	83 666,6	6 891,1	100,0	83 958,9	8 229,6	100,0	80 660,9	9 120,6	100,0

	2023			2024			2025		
	Net	CZK	share	Net	CZK	share	Net	CZK	share
	(t)	million	(%)	(t)	million	(%)	(t)	million	(%)
European Union	49 961,3	5 091,4	61,0	50 323,4	4 958,7	62,1	50 171,8	4 532,6	62,4
Other European countries	8 463,2	1 126,9	13,5	5 521,8	816,0	10,2	4 907,0	746,7	10,3
USA and Canada	3 006,7	601,1	7,2	2 188,7	512,5	6,4	2 014,5	444,2	6,1
Other countries	9 175,7	1 521,9	18,2	8 958,3	1 695,4	21,2	7 369,1	1 544,5	21,3
Total	70 606,8	8 341,3	100,0	66 992,2	7 982,6	100,0	64 462,4	7 268,0	100,0

Structure of tableware-glass exports by territory in 2025 (CZK)



Tableware glass can be said to be exported worldwide. In 2025, European Union countries accounted for 62.4% of exports. The largest customers were Germany, Spain, Poland, France, Belgium and Austria. Other countries, together with the USA and Canada, accounted for 27.4% of exports (exports went to 80 countries). The largest customers were the United Kingdom, the Russian Federation, Turkey, the USA and Brazil.

Other glass

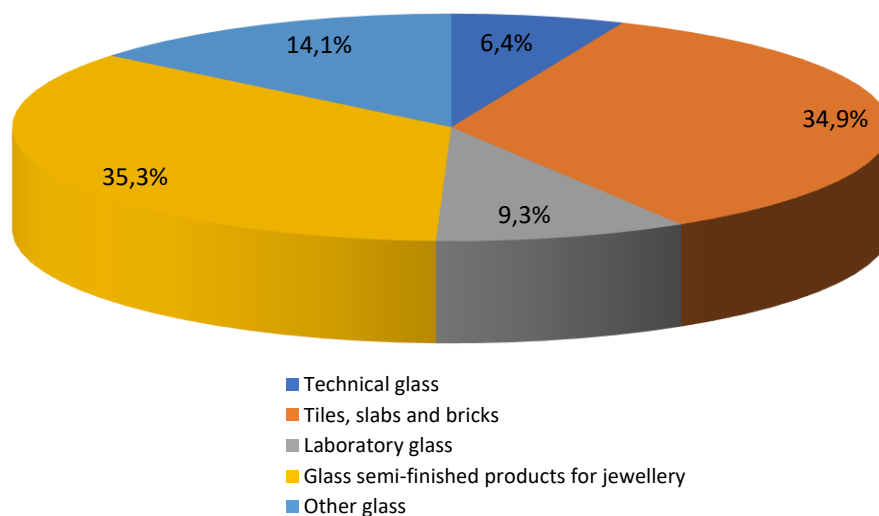
The range of other glass products exported is very broad. It includes technical glass, laboratory glass and laboratory apparatus glass, technical glass beads, industrial glass apparatus, protective welding glass and optical glass; it also includes the production of glass building blocks, glass semi-finished products for jewellery and lighting glass.

Exports of other glass amounted to CZK 5,821.5 million in 2025. In 2023, lighting glass was not included in exports because it is not covered by the glass export and import codes, i.e. glass articles for electric lighting equipment other than reflectors, faceted glass and similar products, and glass ornaments for electric chandeliers, amounting to approximately CZK 300 million.

Other-glass exports by product range

	2020			2021			2022		
	Net	CZK	share	Net	CZK	share	Net	CZK	share
	(t)	million	(%)	(t)	million	(%)	(t)	million	(%)
Technical glass	2 845,6	578,3	12,5	3 765,5	519,4	9,3	3 904,4	518,1	8,8
Tiles, slabs and bricks	61 066,8	1 481,3	32,1	66 231,1	1 533,3	27,4	44 197,1	1 448,6	24,6
Laboratory glass	2 598,5	551,3	12,0	3 154,1	623,1	11,1	2 848,3	688,1	11,7
Glass semi-finished products for jewellery	2 798,8	1 395,4	30,3	3 320,4	2 070,3	37,0	3 665,1	2 431,8	41,4
Other glass	20 742,5	605,7	13,1	35 353,0	850,9	15,2	22 993,9	792,6	13,5
Total	90 052,2	4 612,0	100,0	111 824,1	5 597,0	100,0	77 608,8	5 879,2	100,0
	2023			2024			2025		
	Net	CZK	share	Net	CZK	share	Net	CZK	share
	(t)	million	(%)	(t)	million	(%)	(t)	million	(%)
Technical glass	2 288,6	370,9	7,1	2 107,4	356,0	6,0	2 208,9	372,4	6,4
Tiles, slabs and bricks	40 122,1	1 443,0	27,5	41 177,0	2 087,1	34,9	39 360,5	2 029,1	34,9
Laboratory glass	2 312,2	596,8	11,4	2 193,9	572,5	9,6	2 068,8	541,6	9,3
Glass semi-finished products for jewellery	3 223,1	2 066,7	39,3	3 097,3	2 099,8	35,1	2 957,9	2 054,8	35,3
Other glass	36 377,5	775,9	14,8	32 196,4	863,2	14,4	27 788,2	823,6	14,1
Total	84 323,5	5 253,3	100,0	80 772,0	5 978,6	100,0	74 384,3	5 821,5	100,0

Structure of other-glass exports by product range in 2025 (CZK)



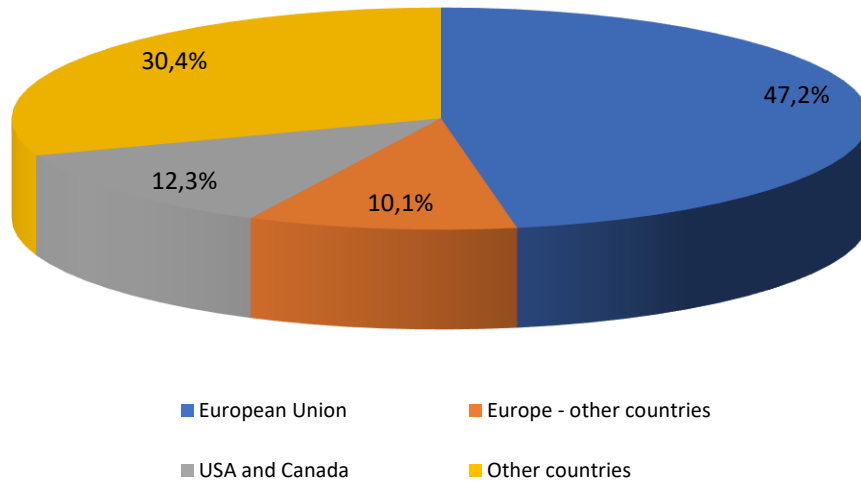
The largest share, 35.3%, consisted of exports of jewellery and glass semi-finished products for jewellery. Exports of this product range, traditionally an important Czech export item, have for several years faced increasingly strong and substantially cheaper competition from the Far East. Exports of glass tiles, slabs and bricks ranked second with a share of 34.9%.

The following table shows exports of other glass by territory.

Other-glass exports by territory

	2020			2021			2022		
	Net	CZK	share	Net	CZK	share	Net	CZK	share
	(t)	million	(%)	(t)	million	(%)	(t)	million	(%)
European Union	44 080,2	2 552,5	55,3	61 380,4	2 903,8	51,9	46 266,2	3 043,4	51,8
Europe - other countries	3 644,3	236,1	5,1	4 169,3	279,2	5,0	3 023,5	226,0	3,8
USA and Canada	11 313,0	564,4	12,2	12 477,3	817,1	14,6	9 172,4	857,5	14,6
Other countries	31 014,8	1 259,1	27,3	33 797,1	1 596,9	28,5	19 007,8	1 753,7	29,8
Total	90 052,3	4 612,1	100,0	111 824,1	5 597,0	100,0	77 469,9	5 880,6	100,0

	2023			2024			2025		
	Net	CZK	share	Net	CZK	share	Net	CZK	share
	(t)	million	(%)	(t)	million	(%)	(t)	million	(%)
European Union	56 994,3	2 732,3	50,6	51 475,7	2 797,5	49,8	51 388,7	2 588,8	47,2
Europe - other countries	3 404,4	319,7	5,9	3 737,7	439,1	7,8	4 976,7	555,9	10,1
USA and Canada	7 443,0	740,2	13,7	7 675,6	697,4	12,4	6 903,8	672,7	12,3
Other countries	17 958,7	1 609,7	29,8	15 775,6	1 688,6	30,0	13 314,4	1 671,3	30,4
Total	85 800,4	5 401,9	100,0	78 664,6	5 622,6	100,0	76 583,6	5 488,7	100,0

Structure of other-glass exports by territory in 2025 (CZK)

Unlike exports of flat and container glass and glass fibres and products made from them, a large share of other-glass exports (42.7%) goes to countries outside Europe. However, the situation differs for each product group and may vary from year to year depending on orders. In 2025, exports to the European Union predominated for glass tiles, slabs and bricks (63.8%), laboratory glass (54.0%) and technical glass (52.7%). By contrast, exports of glass semi-finished products for jewellery were predominantly destined for other countries, including the United States and Canada (80.0%).

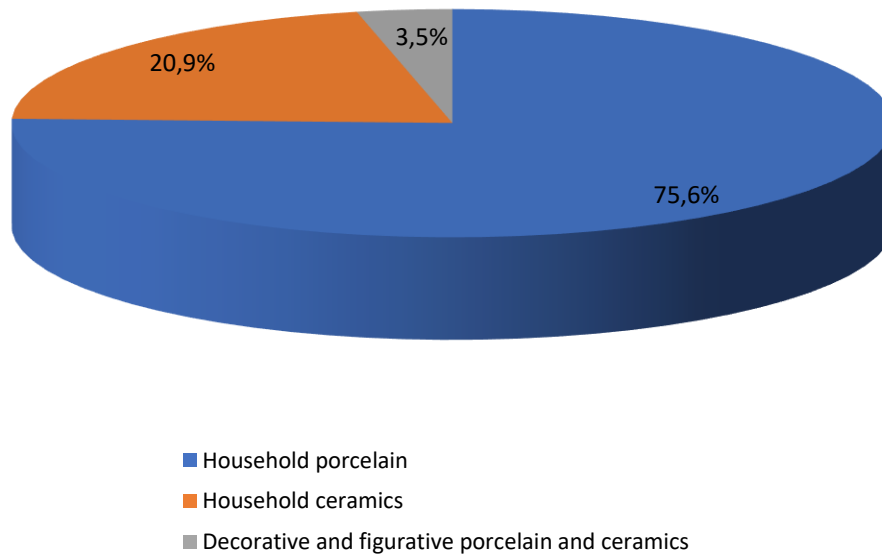
Within the European Union, the largest customers were Germany, Poland, Italy, France, Belgium and Austria; in other European countries, Russia, Ukraine, Switzerland and Norway. Among other countries and the USA and Canada, the largest customers for jewellery and glass semi-finished products for jewellery were mainly Mexico, the USA and India.

Household porcelain and ceramics

Exports of household porcelain, like exports of tableware glass, are among the traditional export sectors of Czech manufacturing. In 2025, exports fell to CZK 2,086.2 million, a decrease compared with 2024.

Exports of household porcelain and ceramics by product range

	2020			2021			2022		
	Net	CZK	share	Net	CZK	share	Net	CZK	share
	(t)	million	(%)	(t)	million	(%)	(t)	million	(%)
Household porcelain	8 125,2	1 315,0	73,3	9 797,7	1 654,7	73,3	10 290,1	1 800,3	76,5
Household ceramics	1 722,6	408,0	22,8	2 885,8	518,7	23,0	2 286,6	457,7	19,5
Decorative and figurative porcelain and ceramics	289,6	70,2	3,9	372,4	84,1	3,7	485,8	94,9	4,0
Total	10 137,4	1 793,2	100,0	13 055,9	2 257,5	100,0	13 062,5	2 352,9	100,0
	2023			2024			2025		
	Net	CZK	share	Net	CZK	share	Net	CZK	share
	(t)	million	(%)	(t)	million	(%)	(t)	million	(%)
Household porcelain	7 987,2	1 545,2	76,8	7 384,1	1 651,8	78,9	7 145,7	1 576,9	75,6
Household ceramics	2 027,3	385,4	19,1	1 985,4	382,9	18,3	2 691,1	436,5	20,9
Decorative and figurative porcelain and ceramics	367,2	82,3	4,1	249,9	59,3	2,8	226,4	72,8	3,5
Total	10 381,7	2 012,9	100,0	9 619,4	2 094,0	100,0	10 063,2	2 086,2	100,0

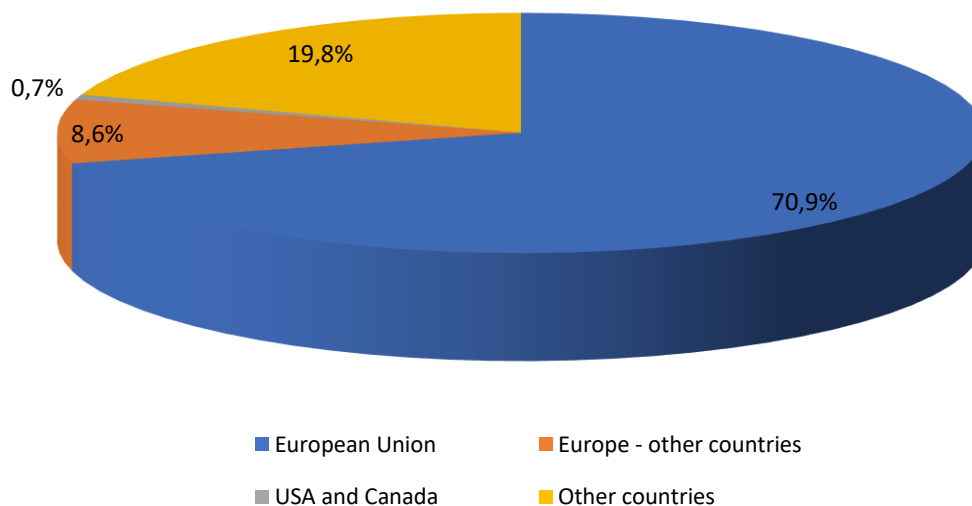
Structure of exports of household porcelain and ceramics by product range in 2025 (CZK)

Within the household porcelain and ceramics group, household porcelain accounted for 75.6% of exports.

Exports of household porcelain and ceramics by territory

	2020			2021			2022		
	Net	CZK million	share	Net	CZK million	share	Net	CZK million	share
	(t)		(%)	(t)		(%)	(t)		(%)
European Union	8 560,6	1 437,3	80,1	10 861,4	1 750,1	77,5	10 803,5	1 796,8	76,4
Europe - other countries	1 011,4	229,3	12,8	1 450,5	322,7	14,3	1 025,5	200,8	8,5
USA and Canada	50,3	8,6	0,5	107,3	19,8	0,9	180,4	34,5	1,5
Other countries	515,1	118,1	6,6	636,7	164,9	7,3	1 053,0	320,7	13,6
Total	10 137,4	1 793,3	100,0	13 055,9	2 257,5	100,0	13 062,4	2 352,8	100,0

	2023			2024			2025		
	Net	CZK million	share	Net	CZK million	share	Net	CZK million	share
	(t)		(%)	(t)		(%)	(t)		(%)
European Union	8 408,7	1 464,1	72,7	7 855,6	1 417,2	67,7	8 505,8	1 479,1	70,9
Europe - other countries	897,2	177,0	8,8	821,5	233,8	11,2	672,0	179,0	8,6
USA and Canada	47,9	10,9	0,5	59,0	14,2	0,7	57,4	14,2	0,7
Other countries	1 028,0	360,9	17,9	883,3	428,8	20,5	828,0	413,9	19,8
Total	10 381,8	2 012,9	100,0	9 619,4	2 094,0	100,0	10 063,2	2 086,2	100,0

Structure of exports of household porcelain and ceramics by territory in 2025 (CZK)

As shown by the table and chart above, exports to all monitored territories were relatively stable over the period, without any significant decreases or increases. The largest customers in the European

Union were Germany, Slovakia and Austria. Exports to other countries, including the USA and Canada, were destined for 55 countries worldwide. The USA and Korea have long been the largest customers.

Exports of household porcelain, like exports of tableware glass and glass semi-finished products for jewellery, are strongly affected by substantially cheaper goods from the Far East.

Technical and sanitary ceramics

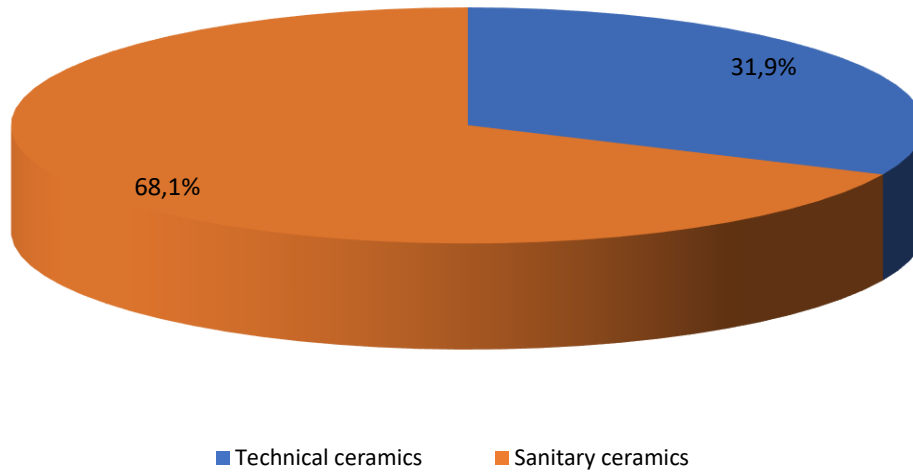
Total exports of technical and sanitary ceramics amounted to CZK 4,216.9 million in 2025. Exports increased compared with 2024.

Exports of technical and sanitary ceramics by product range

	2020			2021			2022		
	Net	CZK	share	Net	CZK	share	Net	CZK	share
	(t)	million	(%)	(t)	million	(%)	(t)	million	(%)
Technical ceramics	2 045,0	732,2	24,4	2 039,4	1 069,6	29,6	2 845,8	1 211,2	30,5
Sanitary ceramics	30 102,6	2 265,8	75,6	33 172,0	2 544,2	70,4	32 943,0	2 753,5	69,5
Total	32 147,6	2 998,0	100,0	35 211,4	3 613,8	100,0	35 788,8	3 964,7	100,0

	2023			2024			2025		
	Net	CZK	share	Net	CZK	share	Net	CZK	share
	(t)	million	(%)	(t)	million	(%)	(t)	million	(%)
Technical ceramics	1 623,4	1 124,4	30,7	1 951,4	1 175,5	29,4	2 177,2	1 343,1	31,9
Sanitary ceramics	27 554,6	2 536,8	69,3	29 650,4	2 825,9	70,6	29 240,4	2 873,8	68,1
Total	29 178,0	3 661,2	100,0	31 601,8	4 001,4	100,0	31 417,6	4 216,9	100,0

Structure of exports of technical and sanitary ceramics by product range in 2025 (CZK)

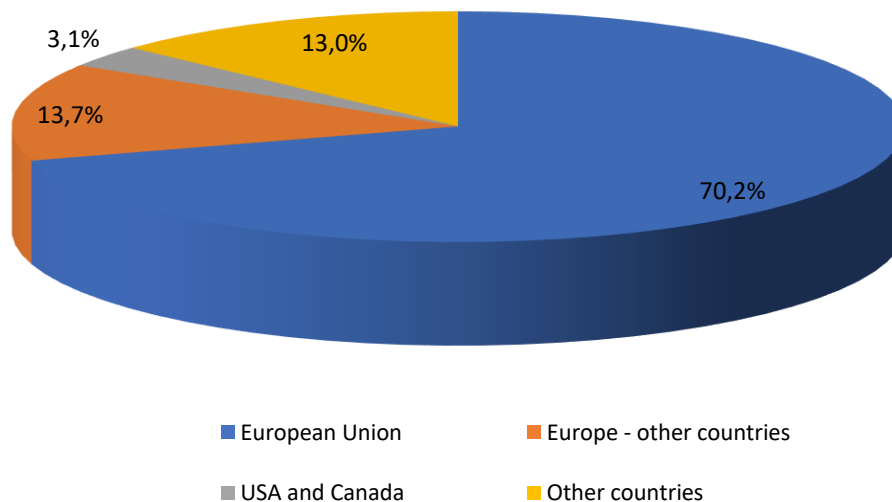


In 2025, sanitary ceramics accounted for 68.1% of exports and technical ceramics for 31.9%.

Exports of technical and sanitary ceramics by territory

	2020			2021			2022		
	Net	CZK	share	Net	CZK	share	Net	CZK	share
	(t)	million	(%)	(t)	million	(%)	(t)	million	(%)
European Union	25 169,3	2 365,7	78,9	27 909,0	2 890,9	80,0	29 499,2	3 169,4	79,9
Europe - other countries	3 440,7	243,1	8,1	3 590,5	267,8	7,4	2 343,2	289,1	7,3
USA and Canada	53,7	19,4	0,6	131,9	79,1	2,2	170,3	94,2	2,4
Other countries	3 483,8	369,9	12,3	3 580,0	375,9	10,4	3 776,2	412,0	10,4
Total	32 147,5	2 998,1	100,0	35 211,4	3 613,7	100,0	35 788,9	3 964,7	100,0

	2023			2024			2025		
	Net	CZK	share	Net	CZK	share	Net	CZK	share
	(t)	million	(%)	(t)	million	(%)	(t)	million	(%)
European Union	20 930,3	2 574,3	70,3	23 601,8	2 758,5	68,9	24 077,2	2 960,5	70,2
Europe - other countries	5 411,4	609,2	16,6	5 243,6	616,5	15,4	4 905,6	576,9	13,7
USA and Canada	84,2	70,7	1,9	209,8	115,1	2,9	160,2	129,4	3,1
Other countries	2 751,9	407,0	11,1	2 546,6	511,3	12,8	2 274,6	550,1	13,0
Total	29 177,8	3 661,2	100,0	31 601,8	4 001,4	100,0	31 417,6	4 216,9	100,0

Structure of exports of technical and sanitary ceramics by territory in 2025 (CZK)

A substantial share of both sectors is exported to European countries. In 2025, European countries accounted for 88.9% of sanitary-ceramics exports (73.4% to the European Union), while European countries accounted for 73.2% of technical-ceramics exports (63.3% to the European Union). The largest European customers for sanitary ceramics included Slovakia, the United Kingdom, Germany and Denmark.

In view of the unfavourable developments in construction in the European Union, sanitary-ceramics manufacturers are seeking new markets outside Europe. Sanitary ceramics are exported, for example, to China, South Africa, Tunisia, Oman, Nigeria and Mongolia.

Imports

Flat glass

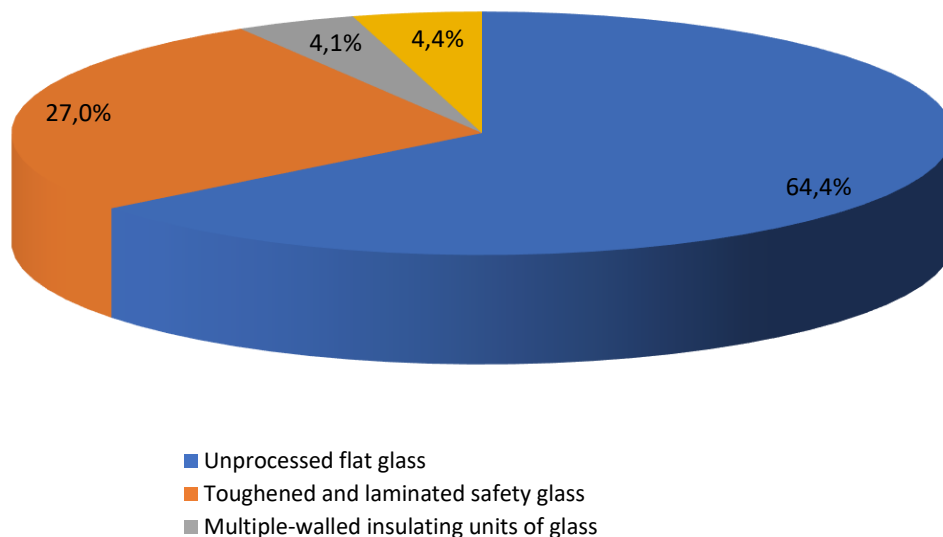
Imports of flat-glass products amounted to CZK 15,245.6 million in 2025. Imports increased compared with 2024.

Flat-glass imports by product range

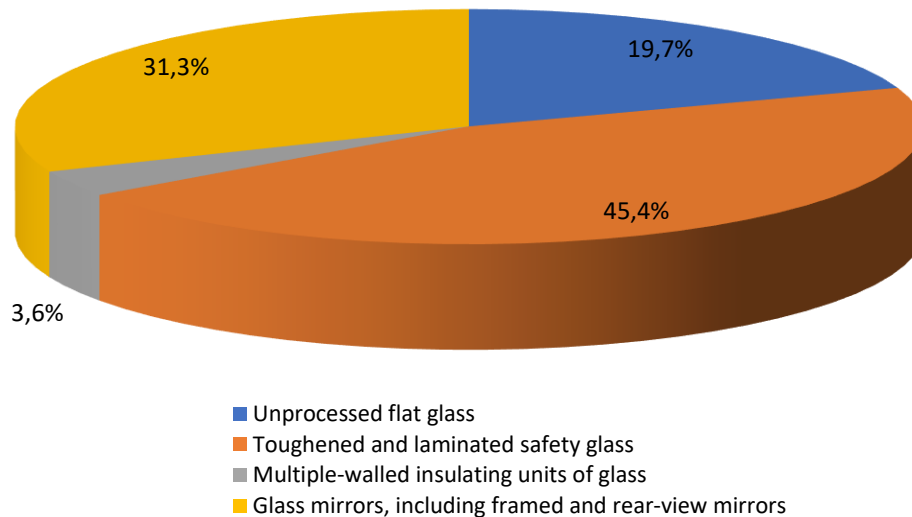
	2020			2021			2022		
	Net	CZK million	share	Net	CZK million	share	Net	CZK million	share
	(t)		(%)	(t)		(%)	(t)		(%)
Unprocessed flat glass	225 588,8	2 740,9	24,4	259 563,9	3 138,4	25,2	235 616,0	3 583,4	28,4
Toughened and laminated safety glass	60 917,0	5 064,0	45,0	68 247,6	5 298,2	42,5	63 458,6	5 222,6	41,4
Multiple-walled insulating units of glass	6 735,9	320,7	2,9	7 687,3	360,0	2,9	8 545,2	467,0	3,7
Glass mirrors, including framed and rear-view mirrors	9 185,3	3 117,7	27,7	11 851,4	3 669,1	29,4	10 640,9	3 352,8	26,6
Total	302 427,0	11 243,3	100,0	347 350,2	12 465,7	100,0	318 260,7	12 625,8	100,0

	2023			2024			2025		
	Net	CZK million	share	Net	CZK million	share	Net	CZK million	share
	(t)		(%)	(t)		(%)	(t)		(%)
Unprocessed flat glass	199 272,8	3 838,9	28,0	180 031,8	3 318,8	23,2	156 440,3	2 998,3	19,7
Toughened and laminated safety glass	65 574,9	5 699,5	41,5	65 727,6	6 234,9	43,7	65 621,9	6 926,3	45,4
Multiple-walled insulating units of glass	9 221,8	531,5	3,9	8 117,5	438,7	3,1	10 079,3	551,8	3,6
Glass mirrors, including framed and rear-view mirrors	10 030,2	3 659,2	26,7	10 822,4	4 289,5	30,0	10 791,5	4 769,2	31,3
Total	284 099,7	13 729,1	100,0	264 699,3	14 281,9	100,0	242 933,0	15 245,6	100,0

Structure of flat-glass imports by product range in 2025 (t)



Structure of flat-glass imports by product range in 2025 (CZK)



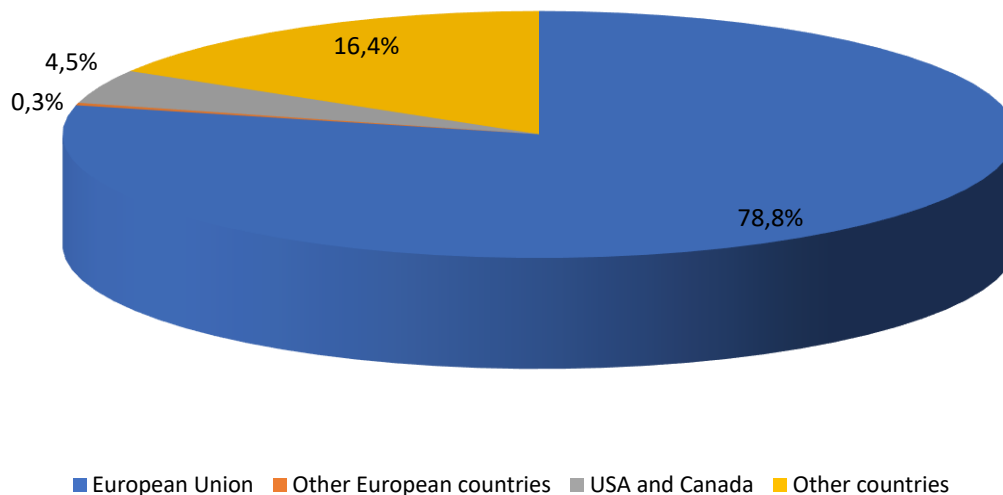
In terms of value in CZK, toughened and laminated safety glass accounted for 45.4% of imports, followed by glass mirrors, including framed and rear-view mirrors, at 31.3%.

Flat-glass imports by territory

	2020			2021			2022		
	Net	CZK million	share	Net	CZK million	share	Net	CZK million	share
	(t)		(%)	(t)		(%)	(t)		(%)
European Union	300 308,6	7 321,9	62,5	325 033,1	9 969,1	80,0	301 214,2	10 142,1	80,3
Other European countries	1 179,2	107,0	0,9	1 423,2	114,5	0,9	686,0	63,3	0,5
USA and Canada	557,0	686,3	5,9	583,4	660,7	5,3	451,9	457,7	3,6
Other countries	32 555,5	3 593,4	30,7	20 310,5	1 721,4	13,8	15 908,8	1 962,6	15,5
Total	334 600,3	11 708,6	100,0	347 350,2	12 465,7	100,0	318 260,9	12 625,7	100,0

	2023			2024			2025		
	Net	CZK million	share	Net	CZK million	share	Net	CZK million	share
	(t)		(%)	(t)		(%)	(t)		(%)
European Union	267 891,1	11 697,6	85,2	260 926,0	9 940,4	67,2	267 019,1	12 671,6	78,8
Other European countries	337,3	59,9	0,4	373,2	52,7	0,4	356,3	52,4	0,3
USA and Canada	352,9	389,5	2,8	487,3	621,9	4,2	504,3	717,2	4,5
Other countries	15 518,5	1 582,2	11,5	22 153,8	4 187,0	28,3	17 885,8	2 645,0	16,4
Total	284 099,8	13 729,2	100,0	283 940,3	14 802,0	100,0	285 765,5	16 086,2	100,0

Structure of flat-glass imports by territory in 2025 (CZK)



In 2025, 78.8% of flat glass imported into the Czech Republic, measured in CZK, came from European Union countries. The largest EU suppliers were Poland, Germany, Italy and Hungary.

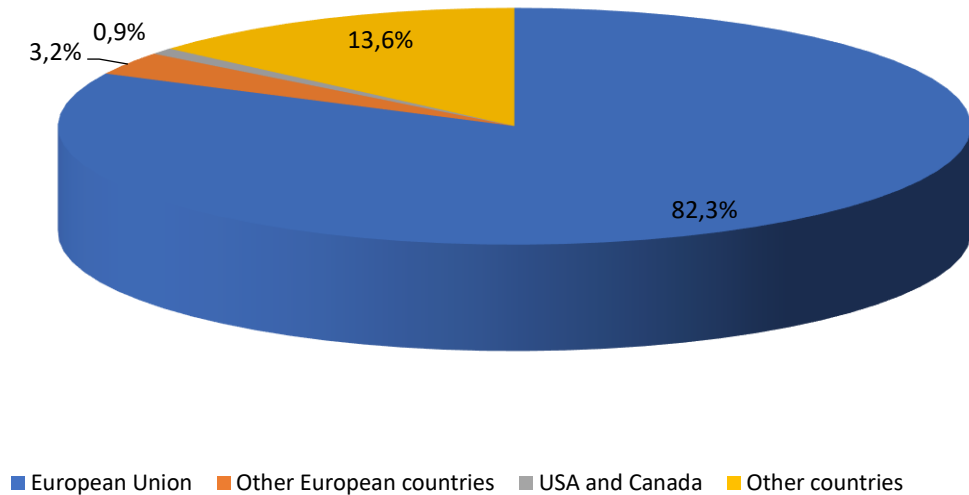
Container glass

Container-glass imports amounted to CZK 2,006.8 million in 2025. This was 0.8% less than in 2024.

Container-glass imports by territory

	2020			2021			2022		
	Net	CZK million	share	Net	CZK million	share	Net	CZK million	share
	(t)		(%)	(t)		(%)	(t)		(%)
European Union	94 850,0	1 542,7	89,7	104 293,4	1 483,8	80,2	99 656,8	1 672,8	79,7
Other European countries	11 401,3	92,4	5,4	9 050,9	89,6	4,8	5 719,0	77,3	3,7
USA and Canada	865,2	45,3	2,6	182,1	8,8	0,5	745,5	50,0	2,4
Other countries	6 008,7	39,1	2,3	6 409,6	266,8	14,4	6 145,5	298,1	14,2
Total	113 125,2	1 719,5	100,0	119 936,0	1 849,0	100,0	112 266,8	2 098,3	100,0

	2023			2024			2025		
	Net	CZK million	share	Net	CZK million	share	Net	CZK million	share
	(t)		(%)	(t)		(%)	(t)		(%)
European Union	115 583,8	1 921,6	89,9	104 946,9	1 726,4	85,3	90 434,9	1 651,9	82,3
Other European countries	3 465,6	52,5	2,5	4 962,0	71,4	3,5	3 630,9	63,4	3,2
USA and Canada	620,9	35,2	1,6	342,5	25,0	1,2	211,4	17,7	0,9
Other countries	1 052,0	128,0	6,0	3 758,5	201,2	9,9	4 951,6	273,8	13,6
Total	120 722,3	2 137,2	100,0	114 009,9	2 024,0	100,0	99 228,8	2 006,8	100,0

Structure of container-glass imports by territory in 2025 (CZK)

Imports, like exports, are determined by the nature of the use of the container-glass product range. In 2025, 82.3% of imports came from European Union countries. The largest suppliers were Germany, Slovakia, Poland and France.

Glass fibres and products made from them

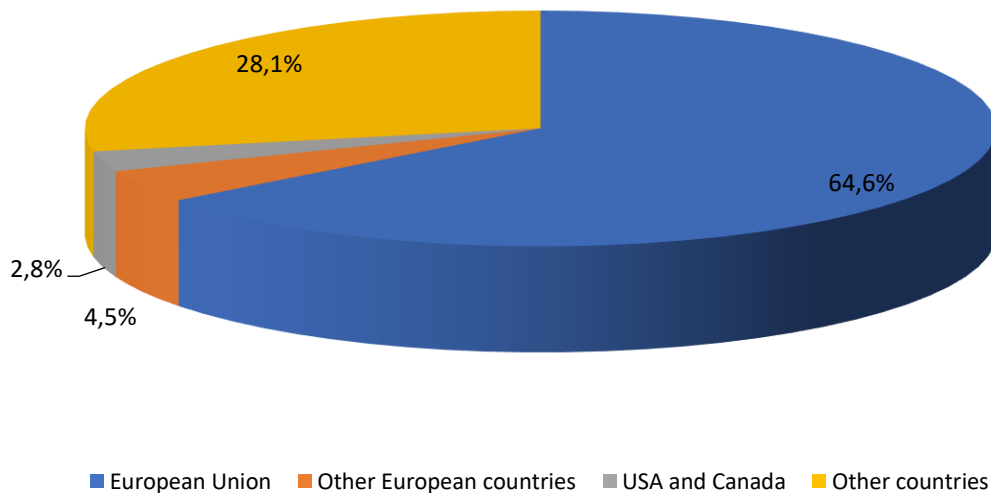
In 2025, glass fibres and products made from them worth CZK 4,427.2 million were imported into the Czech Republic, 6.2% more than in 2024.

Imports of glass fibres and products made from them by territory

	2020			2021			2022		
	Net	CZK	share	Net	CZK	share	Net	CZK	share
	(t)	million	(%)	(t)	million	(%)	(t)	million	(%)
European Union	40 327,0	2 176,7	73,9	43 909,7	2 356,8	70,7	41 888,3	2 689,9	61,3
Other European countries	8 562,7	225,1	7,6	5 711,4	188,7	5,7	4 280,7	237,7	5,4
USA and Canada	339,9	107,7	3,7	389,7	111,7	3,4	285,1	133,4	3,0
Other countries	8 129,6	435,2	14,8	11 245,1	674,5	20,2	21 421,2	1 327,3	30,2
Total	57 359,2	2 944,7	100,0	61 255,9	3 331,8	100,0	67 875,3	4 388,3	100,0

	2023			2024			2025		
	Net	CZK	share	Net	CZK	share	Net	CZK	share
	(t)	million	(%)	(t)	million	(%)	(t)	million	(%)
European Union	38 991,4	2 517,6	73,3	45 784,6	2 670,9	64,1	54 273,7	2 858,9	64,6
Other European countries	3 459,5	212,7	6,2	1 995,7	219,7	5,3	911,4	199,0	4,5
USA and Canada	205,0	140,7	4,1	216,7	135,6	3,3	168,2	123,3	2,8
Other countries	8 361,4	565,8	16,5	21 490,8	1 143,3	27,4	24 507,8	1 246,0	28,1
Total	51 017,3	3 436,8	100,0	69 487,8	4 169,5	100,0	79 861,1	4 427,2	100,0

Structure of imports of glass fibres and products made from them by territory in 2025 (CZK)



European Union countries accounted for 64.6% of imports. The largest suppliers were Germany, Poland, Belgium and France.

Tableware glass

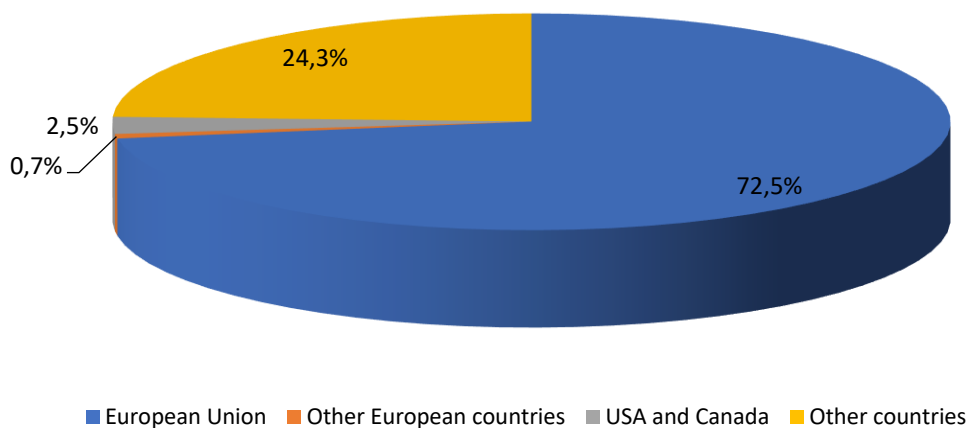
Tableware-glass imports amounted to CZK 2,710.9 million in 2025, 4.8% less than in 2024.

Tableware-glass imports by territory

	2020			2021			2022		
	Net	CZK	share	Net	CZK	share	Net	CZK	share
	(t)	million	(%)	(t)	million	(%)	(t)	million	(%)
European Union	32 068,2	1 658,9	78,1	42 331,0	2 097,6	76,7	45 169,1	2 203,3	75,5
Other European countries	7 046,7	39,8	1,9	9 680,5	44,5	1,6	184,2	9,8	0,3
USA and Canada	94,1	10,6	0,5	70,9	9,6	0,4	22,2	7,0	0,2
Other countries	5 557,6	413,4	19,5	5 883,6	584,2	21,4	7 244,4	698,0	23,9
Total	44 766,6	2 122,8	100,0	57 966,0	2 735,9	100,0	52 620,0	2 918,0	100,0

	2023			2024			2025		
	Net	CZK	share	Net	CZK	share	Net	CZK	share
	(t)	million	(%)	(t)	million	(%)	(t)	million	(%)
European Union	27 290,8	2 046,2	77,6	29 463,5	2 144,5	75,3	26 634,0	1 965,3	72,5
Other European countries	261,2	36,6	1,4	140,3	23,9	0,8	34,8	18,2	0,7
USA and Canada	16,2	10,6	0,4	45,6	17,3	0,6	210,8	68,6	2,5
Other countries	6 339,2	543,5	20,6	9 521,9	661,9	23,2	9 333,4	658,8	24,3
Total	33 907,4	2 636,8	100,0	39 171,3	2 847,6	100,0	36 213,0	2 710,9	100,0

Structure of tableware-glass imports by territory in 2025 (CZK)



The largest share of imports (72.5%) came from European Union countries. The largest suppliers were Germany, Bulgaria, Poland, Austria and France. Among other countries (24.3% of total imports), China and Turkey were the largest suppliers in 2025. Together, these two countries accounted for 95% of imports from other countries.

Other glass

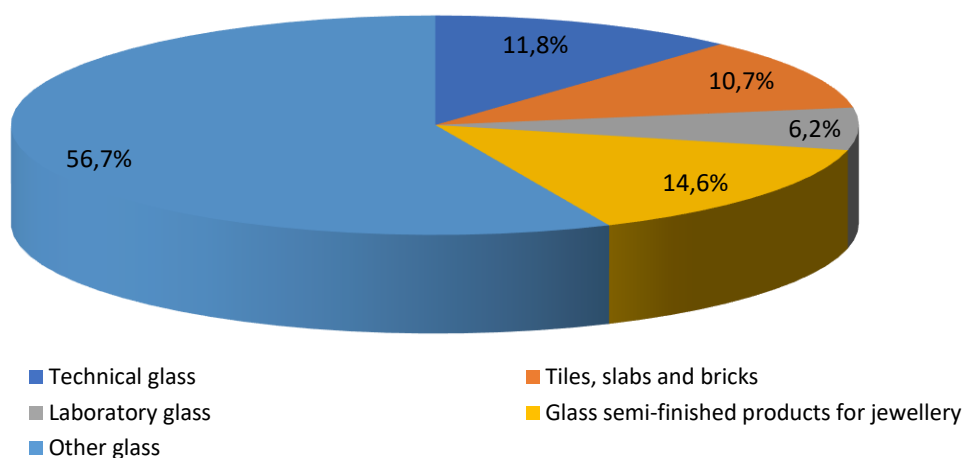
Imports of other glass amounted to CZK 2,007.9 million in 2025.

Other-glass imports by product range

	2020			2021			2022		
	Net	CZK	share	Net	CZK	share	Net	CZK	share
	(t)	million	(%)	(t)	million	(%)	(t)	million	(%)
Technical glass	3 086,6	570,0	30,8	2 739,7	425,0	22,3	2 205,3	389,0	19,3
Tiles, slabs and bricks	2 288,0	102,5	5,5	3 622,5	111,1	5,8	6 758,3	150,0	7,4
Laboratory glass	217,7	101,8	5,5	211,8	108,7	5,7	300,7	130,6	6,5
Glass semi-finished products for jewellery	3 035,8	253,4	13,7	3 560,0	245,5	12,9	3 786,1	260,1	12,9
Other glass	212 704,2	820,7	44,4	235 925,4	1 015,5	53,3	235 246,5	1 084,3	53,8
Total	221 332,3	1 848,4	100,0	246 059,4	1 905,8	100,0	13 050,4	2 014,0	100,0

	2023			2024			2025		
	Net	CZK	share	Net	CZK	share	Net	CZK	share
	(t)	million	(%)	(t)	million	(%)	(t)	million	(%)
Technical glass	1 706,0	280,8	15,2	1 734,0	284,7	13,3	1 404,2	236,6	11,8
Tiles, slabs and bricks	5 285,4	134,0	7,2	3 713,1	220,7	10,3	4 976,7	214,3	10,7
Laboratory glass	225,0	119,5	6,5	280,9	127,7	6,0	222,5	125,1	6,2
Glass semi-finished products for jewellery	3 685,4	275,5	14,9	3 974,4	240,5	11,2	4 356,6	293,4	14,6
Other glass	226 778,7	1 041,8	56,3	295 690,0	1 272,4	59,3	253 166,5	1 138,5	56,7
Total	237 680,5	1 851,6	100,0	305 392,4	2 146,0	100,0	264 126,5	2 007,9	100,0

Structure of other-glass imports by product range in 2025 (CZK)



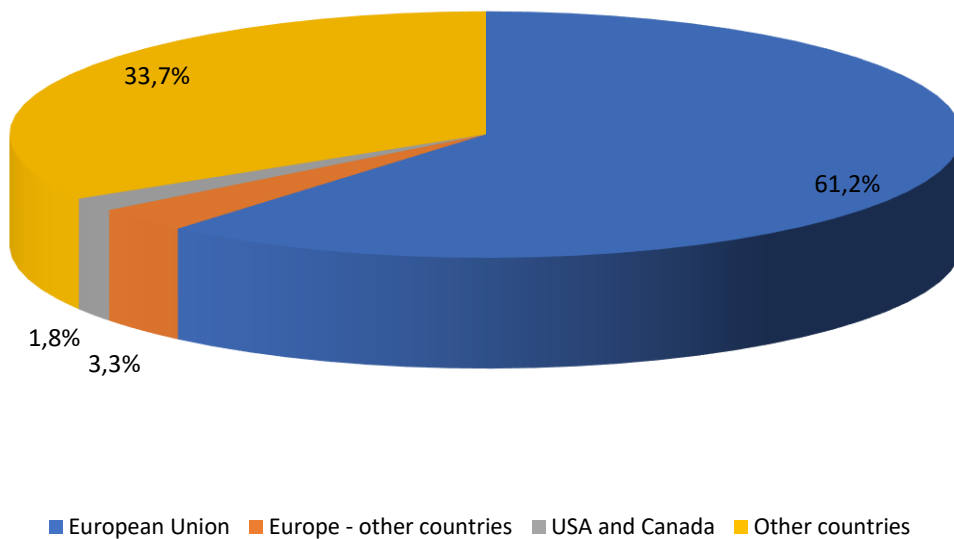
The following table shows imports of other glass by territory.

Other-glass imports by territory

	2020			2021			2022		
	Net	CZK	share	Net	CZK	share	Net	CZK	share
	(t)	million	(%)	(t)	million	(%)	(t)	million	(%)
European Union	195 252,1	514,6	62,7	217 902,0	583,0	57,4	4 219,7	650,8	60,0
Europe - other countries	43,7	33,2	4,0	12 980,4	30,2	3,0	10 716,1	25,8	2,4
USA and Canada	12,4	50,1	6,1	494,8	115,7	11,4	241,9	97,9	9,0
Other countries	17 396,0	222,9	27,2	4 548,2	286,6	28,2	220 068,8	309,7	28,6
Total	212 704,2	820,8	100,0	235 925,4	1 015,5	100,0	235 246,5	1 084,2	100,0

	2023			2024			2025		
	Net	CZK	share	Net	CZK	share	Net	CZK	share
	(t)	million	(%)	(t)	million	(%)	(t)	million	(%)
European Union	194 263,2	673,5	64,7	213 961,1	777,4	61,1	208 030,9	696,4	61,2
Europe - other countries	9 386,2	40,6	3,9	19 935,1	63,4	5,0	11 107,8	37,8	3,3
USA and Canada	53,4	93,5	9,0	5,7	27,1	2,1	6,0	20,3	1,8
Other countries	23 075,9	234,1	22,5	61 788,1	404,5	31,8	34 021,8	384,0	33,7
Total	226 778,7	1041,7	100,0	295 690,0	1 272,4	100,0	253 166,5	1 138,5	100,0

Structure of other-glass imports by territory in 2025 (CZK)



In 2025, 61.2% of imports came from European Union countries and 33.7% from other countries. Imports originated from different countries depending on the product range. In 2025, the largest suppliers of technical glass were Germany, France, China, Malaysia and Taiwan; of laboratory glass, Germany, Italy, the USA, the United Kingdom, India and China; of glass tiles, slabs and bricks, Belgium, Germany, Italy, Poland and China; and of glass semi-finished products for jewellery, Austria, Germany, France, Slovakia, Serbia, China and Japan.

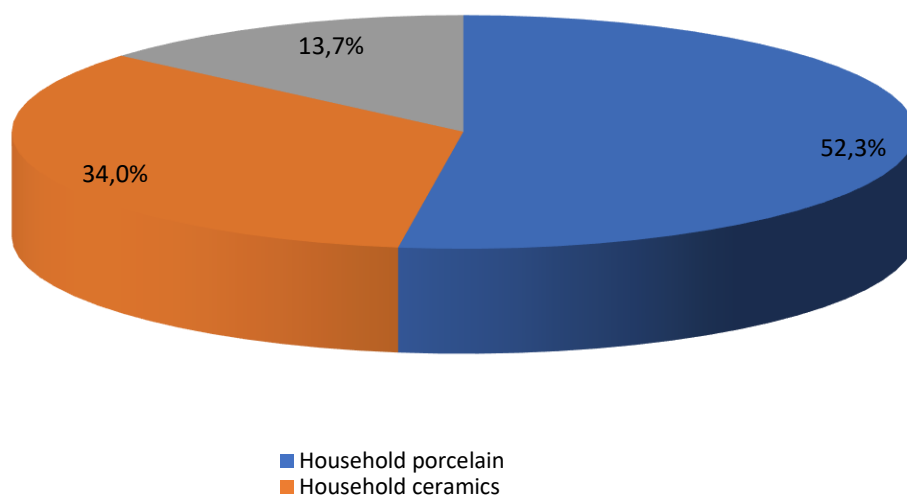
Household porcelain and ceramics

In 2025, household porcelain and ceramics worth CZK 2,138.5 million were imported into the Czech Republic, more than in 2024.

Imports of household porcelain and ceramics by product range

	2020			2021			2022		
	Net	CZK	share	Net	CZK	share	Net	CZK	share
	(t)	million	(%)	(t)	million	(%)	(t)	million	(%)
Household porcelain	21 373,6	762,7	48,2	8 140,5	882,1	45,5	9 155,4	987,8	48,0
Household ceramics	8 220,3	624,4	39,5	8 064,4	806,4	41,6	7 819,0	769,1	37,4
Decorative and figurative porcelain and ceramics	4 524,2	194,5	12,3	2 674,7	249,5	12,9	3 008,1	301,0	14,6
Total	34 118,1	1 581,6	100,0	18 879,6	1 938,0	100,0	19 982,5	2 057,9	100,0
	2023			2024			2025		
	Net	CZK	share	Net	CZK	share	Net	CZK	share
	(t)	million	(%)	(t)	million	(%)	(t)	million	(%)
Household porcelain	7 408,1	809,2	48,6	7 899,3	938,9	50,0	8 226,0	1 118,5	52,3
Household ceramics	6 898,8	617,9	37,1	7 375,8	686,6	36,6	8 066,0	726,8	34,0
Decorative and figurative porcelain and ceramics	2 343,8	238,0	14,3	2 699,4	250,6	13,4	3 325,4	293,2	13,7
Total	16 650,7	1 665,1	100,0	17 974,5	1 876,1	100,0	19 617,4	2 138,5	100,0

Structure of imports of household porcelain and ceramics by product range in 2025 (CZK)

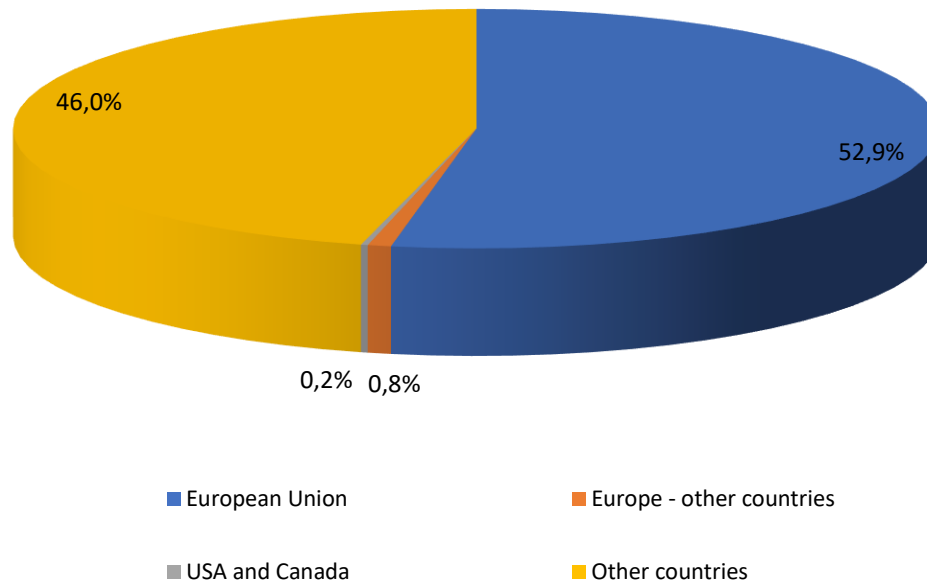


Within imports of this sector's product range, household porcelain accounted for 52.3%, household ceramics for 34.0%, and decorative and figurative porcelain and ceramics for 13.7%.

Imports of household porcelain and ceramics by territory

	2020			2021			2022		
	Net	CZK million	share	Net	CZK million	share	Net	CZK million	share
	(t)		(%)	(t)		(%)	(t)		(%)
European Union	8 681,5	876,6	57,1	9 757,5	1 039,2	53,6	9 409,1	980,4	47,6
Europe - other countries	34,3	2,4	0,2	60,1	4,7	0,2	109,0	4,2	0,2
USA and Canada	2,1	1,2	0,1	3,1	1,9	0,1	2,1	2,0	0,1
Other countries	6 739,4	656,3	42,7	9 058,9	892,1	46,0	10 462,3	1 071,4	52,1
Total	15 457,3	1 536,5	100,0	18 879,6	1 937,9	100,0	19 982,5	2 058,0	100,0

	2023			2024			2025		
	Net	CZK million	share	Net	CZK million	share	Net	CZK million	share
	(t)		(%)	(t)		(%)	(t)		(%)
European Union	8 465,2	848,0	50,9	8 841,6	1 005,1	53,6	8 774,5	1 132,3	52,9
Europe - other countries	109,4	24,7	1,5	75,6	17,3	0,9	74,1	17,4	0,8
USA and Canada	2,7	2,9	0,2	2,4	2,3	0,1	5,2	5,1	0,2
Other countries	8 073,3	789,4	47,4	9 054,9	851,4	45,4	10 763,6	983,7	46,0
Total	16 650,6	1 665,0	100,0	17 974,5	1 876,1	100,0	19 617,4	2 138,5	100,0

Structure of imports of household porcelain and ceramics by territory in 2025 (CZK)

European Union countries accounted for 52.9% of total imports. Germany was the largest supplier, followed by Poland. Other countries accounted for 46.0% of imports of household porcelain and ceramics. China was the largest supplier.

Technical and sanitary ceramics

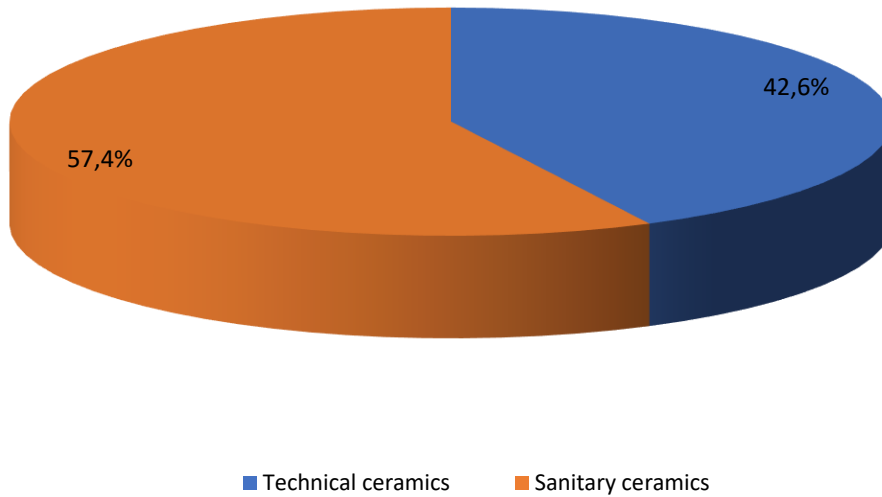
Imports of technical and sanitary ceramics amounted to CZK 3,346.8 million in 2025. Imports increased compared with 2024.

Imports of technical and sanitary ceramics by product range

	2020			2021			2022		
	Net	CZK	share	Net	CZK	share	Net	CZK	share
	(t)	million	(%)	(t)	million	(%)	(t)	million	(%)
Technical ceramics	4 032,7	778,3	40,9	4 613,0	917,6	38,6	4 345,4	1 270,2	43,0
Sanitary ceramics	15 664,5	1 123,9	59,1	19 751,7	1 461,2	61,4	20 014,3	1 684,1	57,0
Total	19 697,2	1 902,2	100,0	24 364,7	2 378,8	100,0	24 359,7	2 954,3	100,0

	2023			2024			2025		
	Net	CZK	share	Net	CZK	share	Net	CZK	share
	(t)	million	(%)	(t)	million	(%)	(t)	million	(%)
Technical ceramics	4 257,2	1 346,5	47,6	5 970,4	1 392,2	45,3	5 788,9	1 425,1	42,6
Sanitary ceramics	16 146,7	1 479,4	52,4	18 971,0	1 681,3	54,7	23 488,2	1 921,7	57,4
Total	20 403,9	2 825,9	100,0	24 941,4	3 073,5	100,0	29 277,1	3 346,8	100,0

Structure of imports of technical and sanitary ceramics by product range in 2025 (CZK)



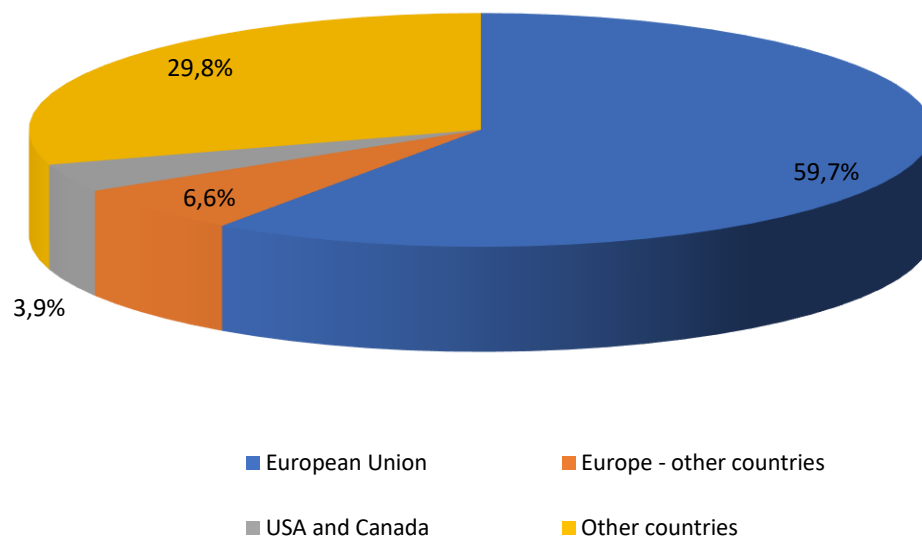
In 2025, sanitary ceramics accounted for 57.4% of imports and technical ceramics for 42.6%.

Imports of technical and sanitary ceramics by territory

	2020			2021			2022		
	Net	CZK	share	Net	CZK	share	Net	CZK	share
	(t)	million	(%)	(t)	million	(%)	(t)	million	(%)
European Union	9 535,7	1 127,0	60,6	13 959,9	1 471,9	61,9	13 528,3	1 798,7	60,9
Europe - other countries	1 392,0	144,4	7,8	2 516,4	204,1	8,6	1 931,9	215,1	7,3
USA and Canada	46,6	134,6	7,2	125,6	157,0	6,6	125,1	182,0	6,2
Other countries	9 914,1	452,5	24,3	7 762,7	545,8	22,9	8 774,4	758,5	25,7
Total	20 888,4	1 858,5	100,0	24 364,6	2 378,8	100,0	24 359,7	2 954,3	100,0

	2023			2024			2025		
	Net	CZK	share	Net	CZK	share	Net	CZK	share
	(t)	million	(%)	(t)	million	(%)	(t)	million	(%)
European Union	11 423,0	1 831,1	64,8	13 510,9	1 981,0	64,5	14 552,4	1 997,3	59,7
Europe - other countries	1 286,3	258,2	9,1	1 197,3	242,8	7,9	971,0	220,2	6,6
USA and Canada	75,8	138,0	4,9	27,9	106,5	3,5	21,3	130,6	3,9
Other countries	7 618,8	598,6	21,2	10 205,3	743,2	24,2	13 732,4	998,7	29,8
Total	20 403,9	2 825,9	100,0	24 941,4	3 073,5	100,0	29 277,1	3 346,8	100,0

Structure of imports of technical and sanitary ceramics by territory in 2025 (CZK)



In 2025, imports from European Union countries accounted for 58.4% of technical-ceramics imports. Germany was the largest supplier. For sanitary ceramics, European Union countries accounted for 60.7% of imports. The largest suppliers were Poland, Germany and Austria. Among other countries, which accounted for 30.5% of total sanitary-ceramics imports, China and Turkey were the largest suppliers of this product range.

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