



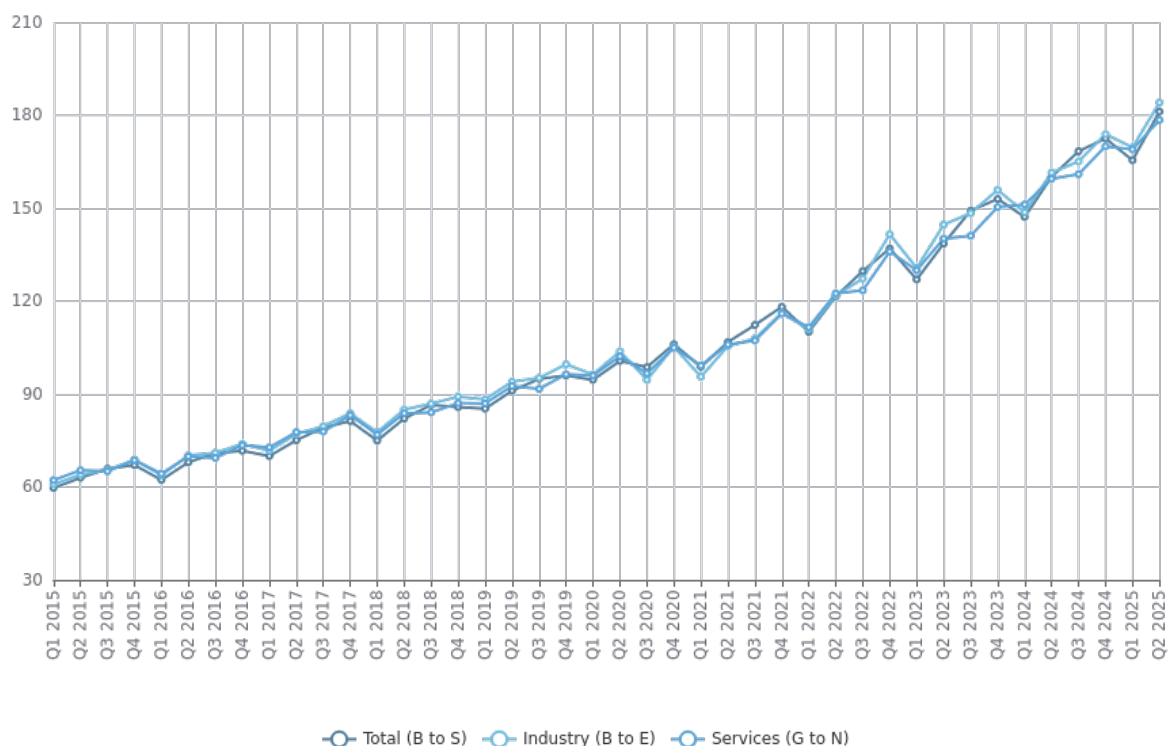
LABOUR COST INDEX - SECOND QUARTER OF 2025

In the second quarter of 2025, compared to the second quarter of 2024, the total hourly labour cost rose by 13.2% (according to preliminary data). The total hourly labour cost increased by 14.0% in industry, by 11.9% in services and by 16.2% in construction.

The highest annual growth in total labour costs was recorded in the following sectors: 'Administrative and support service activities' - by 18.1%, 'Arts, entertainment and recreation' - by 17.7%, and 'Mining and quarrying' - by 17.2%.

In the structure of the total labour costs, the wages and salaries costs per hour worked grew by 13.4% in comparison with a year earlier, while the other (non-wage) costs rose by 12.3%. Among the economic activities in the second quarter of 2025, compared to the second quarter of 2024, the growth rate of wages and salaries component ranged from 18.8% in the 'Arts, entertainment and recreation' sector to 7.0% in the 'Accommodation and food service activities' sector.

Figure 1. Total labour cost index - % (Calendar-adjusted, 2020 = 100)



Methodological notes

The Labour Cost Index is a short-term indicator measuring the quarterly development of hourly labour costs incurred by employers as a result of engaging the labour workforce. The Quarterly Survey on employees, hours worked, wages and salaries and other expenditures paid by the employer is the main source used for the labour cost index data calculation.

The Labour Cost Index (LCI) is defined as a Laspeyres index of labour costs per hour worked. It has been calculated broken down by economic activities at a section level according to the new NACE Rev. 2 classification and with base year 2020 = 100. Based on Regulation (EC) No. 450/2003 of the European Parliament and of the Council, separate indices shall be calculated for the Total Labour Costs and for their two main components: Wage and salary costs and Labour costs other than wages and salaries.

Total labour costs (TOT), which include wages and salaries paid by the employer in cash or in kind, employers' actual and imputed social contributions plus taxes, regarded as labour costs;

Wage and salary costs (WAG) cover wages and salaries paid in cash or in kind;

Labour costs other than wages and salaries (OTH - non-wage costs) include the employers' actual and imputed social contributions plus taxes, regarded as labour costs.

Since the second quarter of 2020, the amounts received under government measures to support employers' labour costs are excluded.

Economic activity coverage (NACE Rev. 2):

- **Total (sections B to S)** - 'Mining and quarrying' (B), 'Manufacturing' (C), 'Electricity, gas, steam and air conditioning supply' (D), 'Water supply, sewerage, waste management and remediation activities' (E), 'Construction' (F), 'Wholesale and retail trade; repair of motor vehicles and motorcycles' (G), 'Transportation and storage' (H), 'Accommodation and food service activities' (I), 'Information and communication' (J), 'Financial and insurance activities' (K), 'Real estate activities' (L), 'Professional, scientific and technical activities' (M), 'Administrative and support service activities' (N), 'Public administration and defence; compulsory social security' (O), 'Education' (P), 'Human health and social work activities' (Q), 'Arts, entertainment and recreation' (R), 'Other service activities' (S);
- **Industry (section B to E)** - 'Mining and quarrying' (B), 'Manufacturing' (C), 'Electricity, gas, steam and air conditioning supply' (D), 'Water supply, sewerage, waste management and remediation activities' (E);
- **Services (sections G to N)** - 'Wholesale and retail trade; repair of motor vehicles and motorcycles' (G), 'Transportation and storage' (H), 'Accommodation and food service activities' (I), 'Information and communication' (J), 'Financial and insurance activities' (K), 'Real estate activities' (L), 'Professional, scientific and technical activities' (M), 'Administrative and support service activities' (N).

Annex

Table 1. Changes of Hourly Labour cost Indices compared to the corresponding period of the previous year (Calendar-adjusted)

																(Per cent)
Code NACE.BG - 2008[1]	Economic activities	Q2 2024* (TOT)	Q2 2024* (WAG)	Q2 2024* (OTH)	Q3 2024* (TOT)	Q3 2024* (WAG)	Q3 2024* (OTH)	Q4 2024* (TOT)	Q4 2024* (WAG)	Q4 2024* (OTH)	Q1 2025* (TOT)	Q1 2025* (WAG)	Q1 2025* (OTH)	Q2 2025* (TOT)	Q2 2025* (WAG)	Q2 2025* (OTH)
B to S	All NACE branches except agriculture, fishing, private households with employed persons	15.5	15.6	15.2	12.9	12.7	13.5	12.8	13.0	11.7	12.4	13.0	9.5	13.2	13.4	12.3
B to E	Industry (except construction)	11.6	11.7	11.4	11.3	11.0	12.4	11.5	11.4	12.2	14.1	14.5	12.3	14.0	14.2	13.3
G to N	Services (excluding public administration)	13.8	13.9	12.9	14.2	14.1	14.7	13.0	13.1	13.0	11.8	12.5	7.5	11.9	12.0	11.2
B	Mining and quarrying	1.9	2.0	1.5	1.1	-0.5	7.0	10.7	10.1	13.0	0.8	0.3	2.8	17.2	17.0	17.8
C	Manufacturing	12.4	12.5	11.8	12.0	12.0	11.8	12.3	12.3	11.8	14.9	15.1	14.0	14.7	14.8	13.8
D	Electricity, gas, steam and air conditioning supply	9.2	8.3	13.3	10.0	7.7	19.4	5.7	3.9	14.2	13.8	16.2	3.8	7.0	7.1	6.4

																(Per cent)
E	Water supply, sewerage, waste management and remediation activities	15.9	16.5	13.2	14.1	14.4	12.7	13.2	13.4	12.2	16.4	16.4	16.3	15.8	15.8	16.1
F	Construction	19.5	20.8	12.8	12.7	13.1	10.3	17.2	17.7	14.9	19.7	20.3	16.3	16.2	16.2	15.9
G	Wholesale and retail trade; repair of motor vehicles and motorcycles	16.0	16.3	13.9	15.6	15.5	16.3	14.9	14.7	15.5	11.5	11.3	12.3	11.0	10.9	11.4
H	Transportation and storage	14.7	15.3	12.0	15.7	16.3	12.9	14.6	15.8	9.4	11.0	11.2	9.7	13.6	13.9	12.5
I	Accommodation and food service activities	24.3	25.4	18.8	17.6	18.3	13.9	13.4	13.3	14.2	13.5	13.4	14.1	7.7	7.0	11.3
J	Information and communication	8.2	8.1	9.7	10.9	10.4	15.2	8.5	8.2	10.9	9.1	11.4	-7.2	8.9	9.2	6.4
K	Financial and insurance activities	11.9	12.1	10.9	11.8	11.6	13.0	9.0	9.1	7.9	14.5	15.6	7.4	14.7	15.2	11.2
L	Real estate activities	24.8	23.8	30.8	23.6	23.3	25.4	23.3	22.6	27.8	19.2	19.5	17.0	16.5	17.6	10.1
M	Professional, scientific and technical activities	14.9	15.1	13.6	12.8	13.2	10.6	17.3	17.8	14.6	14.8	15.0	13.8	14.7	14.9	13.8
N	Administrative and support service activities	13.1	13.2	12.3	16.4	16.6	15.4	13.9	14.1	13.0	13.8	14.3	11.2	18.1	18.3	17.0

																(Per cent)
O	Public administration and defence; compulsory social security	27.1	27.7	25.4	10.3	10.2	10.5	8.7	10.2	3.7	7.5	7.3	8.2	16.3	17.3	12.8
P	Education	26.4	25.9	28.5	8.7	7.7	12.8	13.9	14.8	10.2	11.2	12.1	7.9	15.3	15.9	12.9
Q	Human health and social work activities	15.8	16.1	14.6	14.8	15.0	14.1	12.1	12.1	12.2	11.5	11.8	9.7	12.0	12.0	11.5
R	Arts, entertainment and recreation	21.1	21.5	19.0	17.4	17.5	17.3	21.3	22.0	17.4	17.9	18.7	14.0	17.7	18.8	11.9
S	Other service activities	21.7	23.3	14.0	22.6	22.8	21.7	23.4	24.3	19.3	12.6	11.6	17.6	13.9	13.8	14.7

TOT - Total labour costs

WAG - Wages and salaries costs

OTH - Other (non-wage) costs

[1] NACE.BG - 2008 - National Classification of economic activities comparable with NACE Rev. 2.

*Preliminary data.

Table 2. Labour Cost Index - Total labour costs for the period 2022 - 2025 (Calendar-adjusted, 2020 = 100)

														(Per cent)
Code NACE.BG - 2008[1]	Economic activities	Q2 2022	Q3 2022	Q4 2022	Q1 2023	Q2 2023	Q3 2023	Q4 2023	Q1 2024	Q2 2024	Q3 2024	Q4 2024	Q1 2025	Q2 2025
B до S	All NACE branches except agriculture, fishing, private households with employed persons	121.5	129.7	137.0	127.0	138.6	149.2	153.0	147.2	160.1	168.4	172.5	165.5	181.2
B to E	Industry (except construction)	121.8	127.3	141.6	130.7	144.7	148.4	155.9	148.7	161.5	165.1	173.9	169.6	184.1
G to N	Services (excluding public administration)	122.5	123.5	136.0	130.0	140.2	141.1	150.4	151.2	159.5	161.0	170.0	169.0	178.5
B	Mining and quarrying	124.3	123.0	153.6	124.0	139.3	140.1	149.5	144.0	141.9	141.5	165.5	145.2	166.3
C	Manufacturing	122.3	130.5	139.8	134.2	146.3	152.2	157.2	152.6	164.4	170.4	176.5	175.4	188.5
D	Electricity, gas, steam and air conditioning supply	122.0	115.2	151.0	114.4	144.2	134.8	156.5	128.3	157.5	148.3	165.5	146.0	168.5
E	Water supply, sewerage, waste management and remediation activities	112.2	114.4	135.3	122.2	129.9	133.2	145.6	140.3	150.6	151.9	164.9	163.3	174.5
F	Construction	123.0	123.8	132.2	129.1	141.2	144.5	159.4	154.3	168.7	162.9	186.9	184.7	196.0
G	Wholesale and retail trade; repair of motor vehicles and motorcycles	122.9	124.7	136.8	130.9	140.7	141.9	152.3	153.0	163.2	164.1	175.0	170.6	181.1
H	Transportation and storage	116.6	118.8	126.8	128.5	140.3	142.2	147.5	152.0	160.9	164.5	169.1	168.7	182.8
I	Accommodation and food service activities	120.5	131.0	152.4	136.4	147.9	153.5	168.7	165.5	183.9	180.5	191.3	187.8	198.0
J	Information and communication	124.4	125.8	137.5	130.0	141.5	140.4	148.8	149.1	153.1	155.7	161.5	162.7	166.7
K	Financial and insurance activities	120.4	111.1	128.7	122.9	126.9	127.8	140.7	138.4	142.0	142.9	153.3	158.5	162.9
L	Real estate activities	113.0	118.8	128.6	114.8	120.9	124.6	138.9	136.9	150.9	154.0	171.3	163.2	175.7

														(Per cent)
M	Professional, scientific and technical activities	117.0	122.0	134.0	124.5	134.3	140.9	147.7	143.2	154.2	158.9	173.4	164.4	176.9
N	Administrative and support service activities	138.2	131.6	145.9	144.2	156.7	149.0	158.9	169.0	177.1	173.5	181.0	192.4	209.2
O	Public administration and defence; compulsory social security	126.0	137.8	140.0	124.6	133.4	155.7	167.5	144.9	169.6	171.7	182.1	155.8	197.2
P	Education	111.6	171.8	128.7	103.2	118.6	209.1	150.6	122.2	150.0	227.3	171.5	135.9	172.9
Q	Human health and social work activities	120.8	124.5	137.4	122.0	133.6	137.4	147.1	140.7	154.8	157.8	164.9	156.9	173.3
R	Arts, entertainment and recreation	124.5	142.5	151.9	135.5	143.3	157.2	160.8	156.0	173.5	184.6	195.1	183.9	204.2
S	Other service activities	123.8	128.5	134.2	126.6	136.5	141.4	144.5	153.8	166.2	173.4	178.4	173.1	189.3

[1] NACE.BG - 2008 - National Classification of economic activities comparable with NACE Rev. 2.

*Preliminary data.