



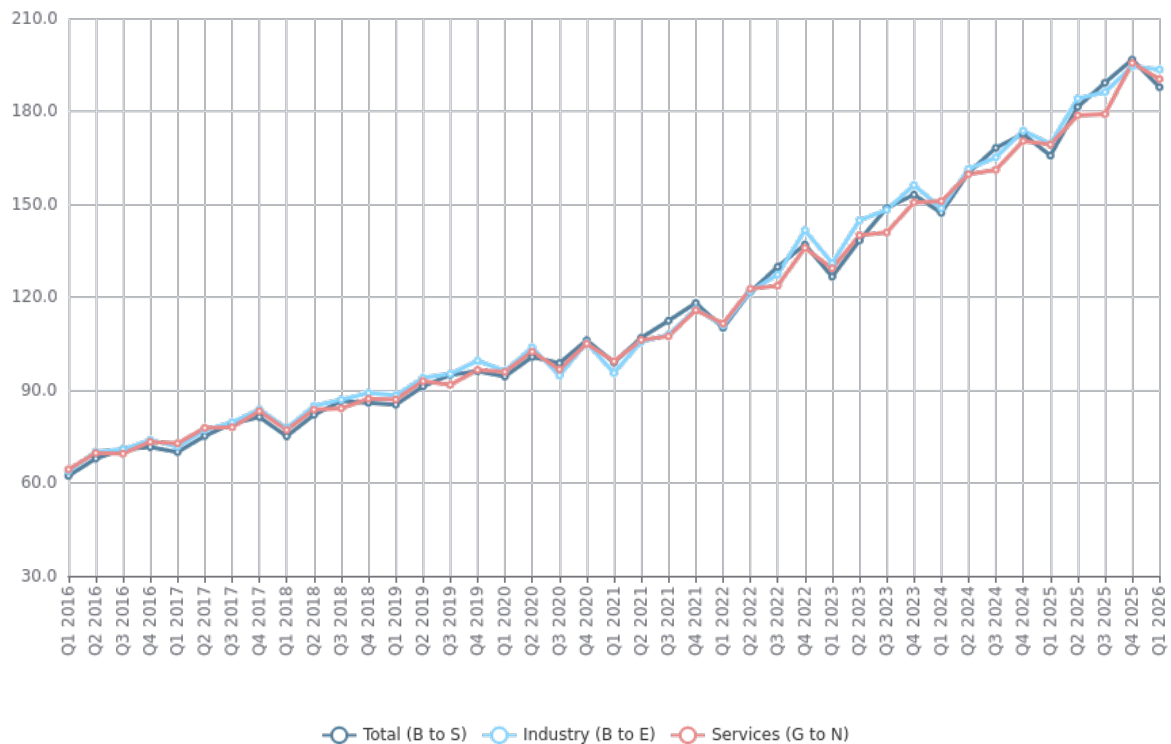
LABOUR COST INDEX - FIRST QUARTER OF 2026

In the first quarter of 2026, compared to the first quarter of 2025, the total hourly labour cost rose by 13.4% (according to preliminary data). The total hourly labour cost increased by 14.1% in industry and by 12.5% in services.

The highest annual growth in total labour costs was recorded in the following sectors: 'Public administration and defence; compulsory social security' - by 20.3%, 'Other service activities' - by 19.3%, and 'Electricity, gas, steam and air conditioning supply' - by 18.9%.

In the structure of the total labour costs, the wages and salaries costs per hour worked grew by 13.2% in comparison with a year earlier, while the other (non-wage) costs rose by 14.2%. Among the economic activities in the first quarter of 2026, compared to the first quarter of 2025, the growth rate of wages and salaries component ranged from 20.6% in the 'Other service activities' sector to 7.7% in the 'Real estate 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	Q1 2025* (TOT)	Q1 2025* (WAG)	Q1 2025* (OTH)	Q2 2025* (TOT)	Q2 2025* (WAG)	Q2 2025* (OTH)	Q3 2025* (TOT)	Q3 2025* (WAG)	Q3 2025* (OTH)	Q4 2025* (TOT)	Q4 2025* (WAG)	Q4 2025* (OTH)	Q1 2026* (TOT)	Q1 2026* (WAG)	Q1 2026* (OTH)
B to S	All NACE branches except agriculture, fishing, private households with employed persons	12.6	13.1	9.6	13.2	13.4	12.3	12.4	12.5	12.3	13.9	13.8	14.3	13.4	13.2	14.2
B to E	Industry (except construction)	14.0	14.4	12.2	14.1	14.3	13.3	12.7	13.2	10.6	12.0	12.1	11.1	14.1	14.0	14.6
G to N	Services (excluding public administration)	12.1	12.8	7.8	11.9	12.0	11.3	11.2	11.0	12.5	14.8	14.7	15.2	12.5	12.4	13.3
B	Mining and quarrying	0.8	0.3	2.8	17.2	17.0	17.8	18.5	20.0	13.2	6.0	4.4	12.3	18.3	18.2	18.6
C	Manufacturing	14.9	15.1	14.0	14.7	14.8	13.8	13.0	13.1	12.3	13.2	13.3	12.8	13.5	13.4	14.1
D	Electricity, gas, steam and air conditioning supply	13.8	16.2	3.8	7.0	7.1	6.4	6.9	9.2	-1.6	2.7	3.6	-0.9	18.9	18.9	19.2

																	(Per cent)
E	Water supply, sewerage, waste management and remediation activities	15.2	15.2	15.1	17.2	17.1	17.5	14.5	15.2	11.4	17.5	18.5	13.3	11.0	11.1	10.5	
F	Construction	19.7	20.3	16.3	16.1	16.1	15.8	16.4	16.4	16.1	20.1	20.1	20.0	11.7	11.4	13.6	
G	Wholesale and retail trade; repair of motor vehicles and motorcycles	11.5	11.3	12.3	10.9	10.8	11.4	10.8	10.8	10.5	13.5	13.4	13.9	13.9	14.0	13.4	
H	Transportation and storage	12.9	13.2	11.6	13.9	14.1	12.8	11.7	11.1	14.5	12.0	11.1	16.3	15.1	15.4	13.6	
I	Accommodation and food service activities	13.5	13.4	14.1	7.7	7.0	11.3	7.5	6.7	11.5	13.0	12.4	16.4	13.5	13.4	14.1	
J	Information and communication	9.1	11.4	-7.2	9.0	9.4	6.6	8.2	7.8	11.0	16.5	16.6	15.7	9.8	9.4	13.0	
K	Financial and insurance activities	14.5	15.5	7.3	14.7	15.2	11.2	14.1	14.3	13.0	16.1	16.4	13.6	13.4	13.3	14.1	
L	Real estate activities	19.2	19.5	17.0	16.5	17.6	10.0	12.7	12.8	12.2	22.5	23.5	17.3	7.7	7.7	8.1	
M	Professional, scientific and technical activities	14.8	15.0	13.8	14.7	14.8	13.8	12.1	12.0	12.9	14.3	14.1	15.6	12.6	12.5	13.4	
N	Administrative and support service activities	14.2	14.7	11.5	18.0	18.2	16.9	20.1	20.1	20.2	17.2	17.3	16.7	11.4	11.2	12.7	

																	(Per cent)
O	Public administration and defence; compulsory social security	7.6	7.4	8.3	16.2	17.2	12.7	16.4	15.9	18.1	12.7	12.2	14.3	20.3	20.5	19.4	
P	Education	11.1	11.9	7.8	15.5	16.1	13.1	13.3	14.7	8.4	12.7	11.8	16.6	16.6	16.4	17.3	
Q	Human health and social work activities	13.5	13.8	11.7	12.0	12.1	11.5	9.6	9.5	10.2	12.7	12.4	14.0	9.4	9.4	9.3	
R	Arts, entertainment and recreation	17.7	18.5	13.8	17.9	19.0	12.1	17.0	15.8	23.2	15.8	15.5	17.4	15.1	14.8	16.7	
S	Other service activities	12.6	11.6	17.6	13.9	13.8	14.7	12.6	12.7	12.3	14.7	15.4	11.0	19.3	20.6	12.9	

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 2023 - 2026 (Calendar-adjusted, 2020 = 100)

														(Per cent)
Code NACE.BG - 2008[1]	Economic activities	Q1 2023	Q2 2023	Q3 2023	Q4 2023	Q1 2024*	Q2 2024*	Q3 2024*	Q4 2024*	Q1 2025*	Q2 2025*	Q3 2025*	Q4 2025*	Q1 2026*
B до S	All NACE branches except agriculture, fishing, private households with employed persons	126.6	138.3	148.8	153.1	147.2	160.2	168.2	172.7	165.7	181.4	189.2	196.7	187.8
B to E	Industry (except construction)	131.0	144.8	148.2	156.2	148.7	161.4	165.1	173.7	169.5	184.1	186.2	194.5	193.5
G to N	Services (excluding public administration)	129.3	140.0	140.9	150.6	151.0	159.7	161.1	170.4	169.3	178.7	179.1	195.6	190.4
B	Mining and quarrying	124.8	139.8	140.8	149.5	144.0	141.9	141.5	165.5	145.2	166.3	167.7	175.5	171.7
C	Manufacturing	134.5	146.7	152.0	157.3	152.6	164.4	170.4	176.5	175.4	188.5	192.5	199.8	199.1
D	Electricity, gas, steam and air conditioning supply	114.4	143.7	134.3	156.5	128.3	157.5	148.3	165.4	145.9	168.4	158.5	169.9	173.6
E	Water supply, sewerage, waste management and remediation activities	122.1	129.1	132.5	148.6	140.5	149.0	152.1	162.0	161.8	174.6	174.2	190.4	179.7
F	Construction	124.7	136.3	138.8	156.9	154.2	168.6	163.0	186.8	184.6	195.8	189.7	224.3	206.3
G	Wholesale and retail trade; repair of motor vehicles and motorcycles	130.1	139.7	141.8	152.3	153.0	163.1	164.2	174.8	170.5	180.9	181.8	198.5	194.2
H	Transportation and storage	128.1	139.4	139.4	144.0	150.3	161.6	164.8	170.8	169.7	184.1	184.1	191.3	195.4
I	Accommodation and food service activities	133.6	144.5	149.2	161.5	165.4	183.8	180.7	191.1	187.7	197.9	194.1	216.0	213.0
J	Information and communication	129.4	142.2	141.7	150.5	149.5	153.5	155.3	162.0	163.0	167.3	168.0	188.8	179.0
K	Financial and insurance activities	121.6	127.4	128.3	143.7	138.4	142.0	143.0	153.3	158.4	162.8	163.2	178.0	179.6
L	Real estate activities	120.3	128.9	128.7	143.4	136.9	150.8	154.0	171.2	163.1	175.6	173.7	209.8	175.7

														(Per cent)
M	Professional, scientific and technical activities	123.9	133.9	139.7	148.6	143.2	154.2	159.0	173.3	164.4	176.9	178.2	198.1	185.1
N	Administrative and support service activities	143.5	157.0	151.2	159.8	168.6	177.1	173.7	181.5	192.5	209.0	208.6	212.8	214.5
O	Public administration and defence; compulsory social security	124.6	133.5	155.6	167.4	144.9	169.7	171.6	182.2	155.9	197.1	199.7	205.3	187.4
P	Education	102.9	118.2	207.5	152.2	122.2	149.8	227.3	171.4	135.8	173.0	257.5	193.2	158.2
Q	Human health and social work activities	122.8	134.1	137.9	147.6	139.3	155.3	158.2	165.5	158.1	173.9	173.5	186.4	172.9
R	Arts, entertainment and recreation	133.5	142.3	158.4	158.7	156.1	173.6	184.4	195.0	183.8	204.6	215.7	225.8	211.4
S	Other service activities	127.7	137.3	142.0	143.1	153.7	166.2	173.4	178.4	173.1	189.3	195.4	204.6	206.5

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

* Preliminary data.