



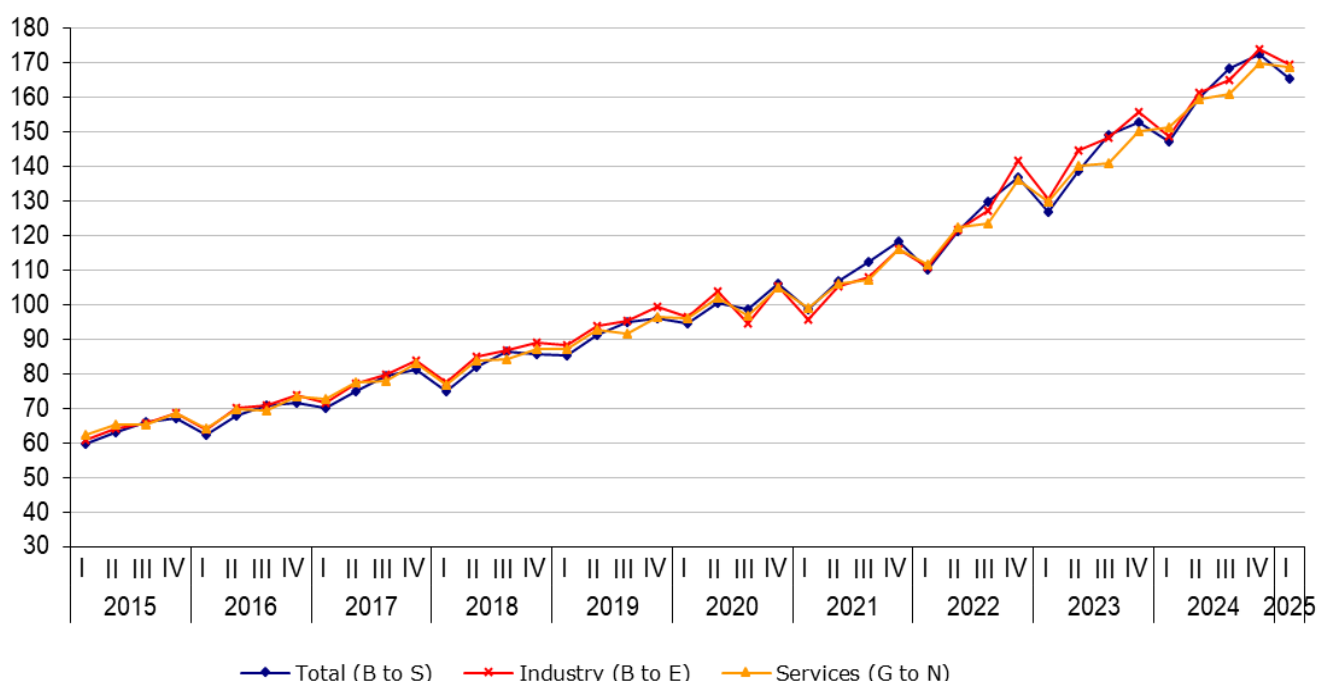
QUARTERLY LABOUR COST INDEX, FIRST QUARTER OF 2025

In the first quarter of 2025, compared to the first quarter of 2024, the total hourly labour cost rose by 12.4% (according to preliminary data). The total hourly labour cost increased by 14.1% in industry and by 11.8% in services.

The highest annual growth in total labour costs was recorded in the following sectors: 'Construction' - by 19.7%, 'Real estate activities' - by 19.2%, and 'Arts, entertainment and recreation' - by 17.9%.

In the structure of the total labour costs, the wages and salaries costs per hour worked grew by 13.0% in comparison with a year earlier, while the other (non-wage) costs rose by 9.5%. Among the economic activities in the first quarter of 2025, compared to the first quarter of 2024, the growth rate of wages and salaries component ranged from 20.3% in 'Construction' sector to 0.3% in 'Mining and quarrying' sector.

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



QUARTERLY LABOUR COST INDEX, FIRST QUARTER OF 2025

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);

**QUARTERLY LABOUR COST INDEX,
FIRST QUARTER OF 2025**

- **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).

More methodological information on the labour cost index and data could be found on the official website of NSI - <http://www.nsi.bg/en>, 'Labour Market' section.

**QUARTERLY LABOUR COST INDEX,
FIRST QUARTER OF 2025**

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 2024*			Q2 2024*			Q3 2024*			Q4 2024*			Q1 2025*		
		TOT	WAG	OTH	TOT	WAG	OTH	TOT	WAG	OTH	TOT	WAG	OTH	TOT	WAG	OTH
B to S	All NACE branches except agriculture, fishing, private households with employed persons	15.9	15.9	15.9	15.5	15.6	15.2	12.9	12.7	13.5	12.8	13.0	11.7	12.4	13.0	9.5
B to E	Industry (except construction)	13.7	13.8	13.5	11.6	11.7	11.4	11.3	11.0	12.4	11.5	11.4	12.2	14.1	14.5	12.3
G to N	Services (excluding public administration)	16.3	16.1	17.8	13.8	13.9	12.9	14.2	14.1	14.7	13.0	13.1	13.0	11.8	12.5	7.5
B	Mining and quarrying	16.2	17.1	12.7	1.9	2.0	1.5	1.1	-0.5	7.0	10.7	10.1	13.0	0.8	0.3	2.8
C	Manufacturing	13.7	13.9	12.6	12.4	12.5	11.8	12.0	12.0	11.8	12.3	12.3	11.8	14.9	15.1	14.0
D	Electricity, gas, steam and air conditioning supply	12.1	11.1	16.4	9.2	8.3	13.3	10.0	7.7	19.4	5.7	3.9	14.2	13.8	16.2	3.8
E	Water supply, sewerage, waste management and remediation activities	14.9	13.6	21.0	15.9	16.5	13.2	14.1	14.4	12.7	13.2	13.4	12.2	16.4	16.4	16.3
F	Construction	19.5	20.8	13.0	19.5	20.8	12.8	12.7	13.1	10.3	17.2	17.7	14.9	19.7	20.3	16.3
G	Wholesale and retail trade; repair of motor vehicles and motorcycles	16.9	17.1	16.0	16.0	16.3	13.9	15.6	15.5	16.3	14.9	14.7	15.5	11.5	11.3	12.3
H	Transportation and storage	18.3	18.4	17.8	14.7	15.3	12.0	15.7	16.3	12.9	14.6	15.8	9.4	11.0	11.2	9.7
I	Accommodation and food service activities	21.3	22.5	15.1	24.3	25.4	18.8	17.6	18.3	13.9	13.4	13.3	14.2	13.5	13.4	14.1
J	Information and communication	14.7	13.0	28.2	8.2	8.1	9.7	10.9	10.4	15.2	8.5	8.2	10.9	9.1	11.4	-7.2
K	Financial and insurance activities	12.6	12.8	10.9	11.9	12.1	10.9	11.8	11.6	13.0	9.0	9.1	7.9	14.5	15.6	7.4
L	Real estate activities	19.2	19.0	20.7	24.8	23.8	30.8	23.6	23.3	25.4	23.3	22.6	27.8	19.2	19.5	17.0
M	Professional, scientific and technical activities	15.0	15.9	9.8	14.9	15.1	13.6	12.8	13.2	10.6	17.3	17.8	14.6	14.8	15.0	13.8
N	Administrative and support service activities	17.2	17.4	15.7	13.1	13.2	12.3	16.4	16.6	15.4	13.9	14.1	13.0	13.8	14.3	11.2
O	Public administration and defence; compulsory social security	16.3	16.9	14.3	27.1	27.7	25.4	10.3	10.2	10.5	8.7	10.2	3.7	7.5	7.3	8.2
P	Education	18.3	18.0	19.5	26.4	25.9	28.5	8.7	7.7	12.8	13.9	14.8	10.2	11.2	12.1	7.9
Q	Human health and social work activities	15.4	15.6	13.9	15.8	16.1	14.6	14.8	15.0	14.1	12.1	12.1	12.2	11.5	11.8	9.7
R	Arts, entertainment and recreation	15.2	15.0	16.1	21.1	21.5	19.0	17.4	17.5	17.3	21.3	22.0	17.4	17.9	18.7	14.0
S	Other service activities	21.4	22.7	15.1	21.7	23.3	14.0	22.6	22.8	21.7	23.4	24.3	19.3	12.6	11.6	17.6

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

* Preliminary data.

TOT - Total labour costs

WAG - Wages and salaries costs

OTH - Other (non-wage) costs

**QUARTERLY LABOUR COST INDEX,
FIRST QUARTER OF 2025**

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	2022				2023*				2024*				2025*
		Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1
B to S	All NACE branches except agriculture, fishing, private households with employed persons	110.1	121.5	129.7	137.0	127.0	138.6	149.2	153.0	147.2	160.1	168.4	172.5	165.5
B to E	Industry (except construction)	110.9	121.8	127.3	141.6	130.7	144.7	148.4	155.9	148.7	161.5	165.1	173.9	169.6
G to N	Services (excluding public administration)	111.6	122.5	123.5	136.0	130.0	140.2	141.1	150.4	151.2	159.5	161.0	170.0	169.0
B	Mining and quarrying	109.7	124.3	123.0	153.6	124.0	139.3	140.1	149.5	144.0	141.9	141.5	165.5	145.2
C	Manufacturing	113.3	122.3	130.5	139.8	134.2	146.3	152.2	157.2	152.6	164.4	170.4	176.5	175.4
D	Electricity, gas, steam and air conditioning supply	99.9	122.0	115.2	151.0	114.4	144.2	134.8	156.5	128.3	157.5	148.3	165.5	146.0
E	Water supply, sewerage, waste management and remediation activities	102.0	112.2	114.4	135.3	122.2	129.9	133.2	145.6	140.3	150.6	151.9	164.9	163.3
F	Construction	114.0	123.0	123.8	132.2	129.1	141.2	144.5	159.4	154.3	168.7	162.9	186.9	184.7
G	Wholesale and retail trade; repair of motor vehicles and motorcycles	112.1	122.9	124.7	136.8	130.9	140.7	141.9	152.3	153.0	163.2	164.1	175.0	170.6
H	Transportation and storage	102.4	116.6	118.8	126.8	128.5	140.3	142.2	147.5	152.0	160.9	164.5	169.1	168.7
I	Accommodation and food service activities	112.2	120.5	131.0	152.4	136.4	147.9	153.5	168.7	165.5	183.9	180.5	191.3	187.8
J	Information and communication	114.9	124.4	125.8	137.5	130.0	141.5	140.4	148.8	149.1	153.1	155.7	161.5	162.7
K	Financial and insurance activities	106.4	120.4	111.1	128.7	122.9	126.9	127.8	140.7	138.4	142.0	142.9	153.3	158.5
L	Real estate activities	102.8	113.0	118.8	128.6	114.8	120.9	124.6	138.9	136.9	150.9	154.0	171.3	163.2
M	Professional, scientific and technical activities	108.8	117.0	122.0	134.0	124.5	134.3	140.9	147.7	143.2	154.2	158.9	173.4	164.4
N	Administrative and support service activities	124.6	138.2	131.6	145.9	144.2	156.7	149.0	158.9	169.0	177.1	173.5	181.0	192.4
O	Public administration and defence; compulsory social security	108.4	126.0	137.8	140.0	124.6	133.4	155.7	167.5	144.9	169.6	171.7	182.1	155.8
P	Education	91.1	111.6	171.8	128.7	103.2	118.6	209.1	150.6	122.2	150.0	227.3	171.5	135.9
Q	Human health and social work activities	118.9	120.8	124.5	137.4	122.0	133.6	137.4	147.1	140.7	154.8	157.8	164.9	156.9
R	Arts, entertainment and recreation	116.0	124.5	142.5	151.9	135.5	143.3	157.2	160.8	156.0	173.5	184.6	195.1	183.9
S	Other service activities	110.0	123.8	128.5	134.2	126.6	136.5	141.4	144.5	153.8	166.2	173.4	178.4	173.1

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

* Preliminary data.