



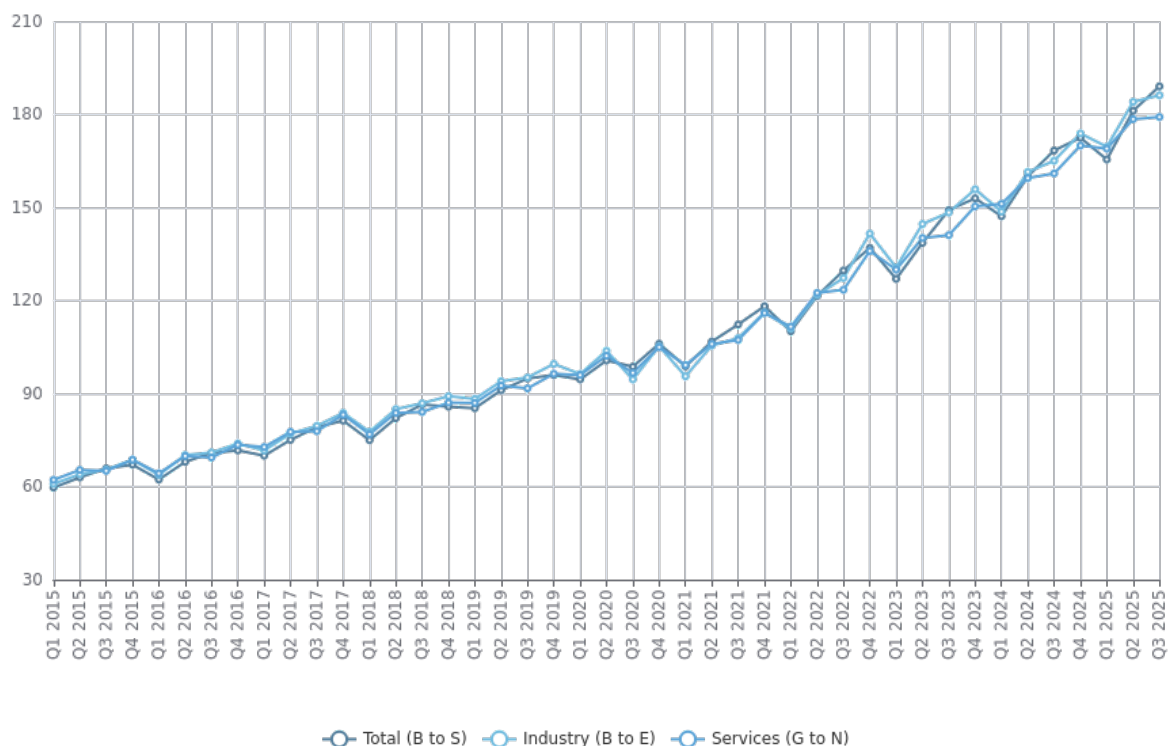
## LABOUR COST INDEX - THIRD QUARTER OF 2025

In the third quarter of 2025, compared to the third quarter of 2024, the total hourly labour cost rose by 12.3% (according to preliminary data). The total hourly labour cost increased by 12.8% in industry, by 11.3% in services and by 16.4% in construction.

The highest annual growth in total labour costs was recorded in the following sectors: 'Administrative and support service activities' - by 21.0%, 'Mining and quarrying' - by 18.5%, and 'Arts, entertainment and recreation' - by 16.8%.

In the structure of the total labour costs, the wages and salaries costs per hour worked grew by 12.4% in comparison with a year earlier, while the other (non-wage) costs rose by 12.1%. Among the economic activities in the third quarter of 2025, compared to the third quarter of 2024, the growth rate of wages and salaries component ranged from 21.0% in 'Administrative and support service activities' sector to 6.7% in '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)            |
|-------------------------------|--|-----------------------|-----------------------|-----------------------|-----------------------|-----------------------|-----------------------|-----------------------|-----------------------|-----------------------|-----------------------|-----------------------|-----------------------|-----------------------|-----------------------|-----------------------|
| <b>Code NACE.BG - 2008[1]</b> | <b>Economic activities</b>   | <b>Q3 2024* (TOT)</b> | <b>Q3 2024* (WAG)</b> | <b>Q3 2024* (OTH)</b> | <b>Q4 2024* (TOT)</b> | <b>Q4 2024* (WAG)</b> | <b>Q4 2024* (OTH)</b> | <b>Q1 2025* (TOT)</b> | <b>Q1 2025* (WAG)</b> | <b>Q1 2025* (OTH)</b> | <b>Q2 2025* (TOT)</b> | <b>Q2 2025* (WAG)</b> | <b>Q2 2025* (OTH)</b> | <b>Q3 2025* (TOT)</b> | <b>Q3 2025* (WAG)</b> | <b>Q3 2025* (OTH)</b> |
| <b>B to S</b>                 | <b>All NACE branches except agriculture, fishing, private households with employed persons</b> | <b>12.9</b>           | <b>12.7</b>           | <b>13.5</b>           | <b>12.8</b>           | <b>13.0</b>           | <b>11.7</b>           | <b>12.4</b>           | <b>13.0</b>           | <b>9.5</b>            | <b>13.2</b>           | <b>13.4</b>           | <b>12.3</b>           | <b>12.3</b>           | <b>12.4</b>           | <b>12.1</b>           |
| <b>B to E</b>                 | <b>Industry (except construction)</b>  | <b>11.3</b>           | <b>11.0</b>           | <b>12.4</b>           | <b>11.5</b>           | <b>11.4</b>           | <b>12.2</b>           | <b>14.1</b>           | <b>14.5</b>           | <b>12.3</b>           | <b>14.0</b>           | <b>14.2</b>           | <b>13.3</b>           | <b>12.8</b>           | <b>13.2</b>           | <b>10.6</b>           |
| <b>G to N</b>                 | <b>Services (excluding public administration)</b>  | <b>14.2</b>           | <b>14.1</b>           | <b>14.7</b>           | <b>13.0</b>           | <b>13.1</b>           | <b>13.0</b>           | <b>11.8</b>           | <b>12.5</b>           | <b>7.5</b>            | <b>11.9</b>           | <b>12.0</b>           | <b>11.2</b>           | <b>11.3</b>           | <b>11.0</b>           | <b>12.6</b>           |
| B                             | Mining and quarrying   | 1.1                   | -0.5                  | 7.0                   | 10.7                  | 10.1                  | 13.0                  | 0.8                   | 0.3                   | 2.8                   | 17.2                  | 17.0                  | 17.8                  | 18.5                  | 20.0                  | 13.2                  |
| C                             | Manufacturing  | 12.0                  | 12.0                  | 11.8                  | 12.3                  | 12.3                  | 11.8                  | 14.9                  | 15.1                  | 14.0                  | 14.7                  | 14.8                  | 13.8                  | 13.0                  | 13.1                  | 12.3                  |
| D                             | Electricity, gas, steam and air conditioning supply  | 10.0                  | 7.7                   | 19.4                  | 5.7                   | 3.9                   | 14.2                  | 13.8                  | 16.2                  | 3.8                   | 7.0                   | 7.1                   | 6.4                   | 6.9                   | 9.2                   | -1.6                  |

|   |  |      |      |      |      |      |      |      |      |      |      |      |      |      |      | (Per cent) |
|---|--|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------------|
| E | Water supply, sewerage, waste management and remediation activities  | 14.1 | 14.4 | 12.7 | 13.2 | 13.4 | 12.2 | 16.4 | 16.4 | 16.3 | 15.8 | 15.8 | 16.1 | 15.4 | 16.1 | 12.4       |
| F | Construction   | 12.7 | 13.1 | 10.3 | 17.2 | 17.7 | 14.9 | 19.7 | 20.3 | 16.3 | 16.2 | 16.2 | 15.9 | 16.4 | 16.4 | 16.1       |
| G | Wholesale and retail trade; repair of motor vehicles and motorcycles | 15.6 | 15.5 | 16.3 | 14.9 | 14.7 | 15.5 | 11.5 | 11.3 | 12.3 | 11.0 | 10.9 | 11.4 | 10.8 | 10.8 | 10.5       |
| H | Transportation and storage   | 15.7 | 16.3 | 12.9 | 14.6 | 15.8 | 9.4  | 11.0 | 11.2 | 9.7  | 13.6 | 13.9 | 12.5 | 11.7 | 11.1 | 14.5       |
| I | Accommodation and food service activities                            | 17.6 | 18.3 | 13.9 | 13.4 | 13.3 | 14.2 | 13.5 | 13.4 | 14.1 | 7.7  | 7.0  | 11.3 | 7.5  | 6.7  | 11.5       |
| J | Information and communication  | 10.9 | 10.4 | 15.2 | 8.5  | 8.2  | 10.9 | 9.1  | 11.4 | -7.2 | 8.9  | 9.2  | 6.4  | 8.2  | 7.8  | 11.0       |
| K | Financial and insurance activities                                   | 11.8 | 11.6 | 13.0 | 9.0  | 9.1  | 7.9  | 14.5 | 15.6 | 7.4  | 14.7 | 15.2 | 11.2 | 14.1 | 14.3 | 13.0       |
| L | Real estate activities   | 23.6 | 23.3 | 25.4 | 23.3 | 22.6 | 27.8 | 19.2 | 19.5 | 17.0 | 16.5 | 17.6 | 10.1 | 12.7 | 12.8 | 12.2       |
| M | Professional, scientific and technical activities                    | 12.8 | 13.2 | 10.6 | 17.3 | 17.8 | 14.6 | 14.8 | 15.0 | 13.8 | 14.7 | 14.9 | 13.8 | 12.1 | 12.0 | 12.9       |
| N | Administrative and support service activities                        | 16.4 | 16.6 | 15.4 | 13.9 | 14.1 | 13.0 | 13.8 | 14.3 | 11.2 | 18.1 | 18.3 | 17.0 | 21.0 | 21.0 | 21.1       |

|   |   |      |      |      |      |      |      |      |      |      |      |      |      |      |      | (Per cent) |
|---|---|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------------|
| O | Public administration and defence; compulsory social security | 10.3 | 10.2 | 10.5 | 8.7  | 10.2 | 3.7  | 7.5  | 7.3  | 8.2  | 16.3 | 17.3 | 12.8 | 16.3 | 15.7 | 18.0       |
| P | Education   | 8.7  | 7.7  | 12.8 | 13.9 | 14.8 | 10.2 | 11.2 | 12.1 | 7.9  | 15.3 | 15.9 | 12.9 | 13.2 | 14.5 | 8.3        |
| Q | Human health and social work activities                       | 14.8 | 15.0 | 14.1 | 12.1 | 12.1 | 12.2 | 11.5 | 11.8 | 9.7  | 12.0 | 12.0 | 11.5 | 9.6  | 9.5  | 10.2       |
| R | Arts, entertainment and recreation                            | 17.4 | 17.5 | 17.3 | 21.3 | 22.0 | 17.4 | 17.9 | 18.7 | 14.0 | 17.7 | 18.8 | 11.9 | 16.8 | 15.6 | 23.0       |
| S | Other service activities                                      | 22.6 | 22.8 | 21.7 | 23.4 | 24.3 | 19.3 | 12.6 | 11.6 | 17.6 | 13.9 | 13.8 | 14.7 | 12.6 | 12.7 | 12.3       |

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)     |
|-------------------------------|--|----------------|----------------|----------------|----------------|----------------|----------------|----------------|----------------|----------------|----------------|----------------|----------------|----------------|
| <b>Code NACE.BG - 2008[1]</b> | <b>Economic activities</b>   | <b>Q3 2022</b> | <b>Q4 2022</b> | <b>Q1 2023</b> | <b>Q2 2023</b> | <b>Q3 2023</b> | <b>Q4 2023</b> | <b>Q1 2024</b> | <b>Q2 2024</b> | <b>Q3 2024</b> | <b>Q4 2024</b> | <b>Q1 2025</b> | <b>Q2 2025</b> | <b>Q3 2025</b> |
| <b>B до S</b>                 | <b>All NACE branches except agriculture, fishing, private households with employed persons</b> | <b>129.7</b>   | <b>137.0</b>   | <b>127.0</b>   | <b>138.6</b>   | <b>149.2</b>   | <b>153.0</b>   | <b>147.2</b>   | <b>160.1</b>   | <b>168.4</b>   | <b>172.5</b>   | <b>165.5</b>   | <b>181.2</b>   | <b>189.1</b>   |
| <b>B to E</b>                 | <b>Industry (except construction)</b>  | <b>127.3</b>   | <b>141.6</b>   | <b>130.7</b>   | <b>144.7</b>   | <b>148.4</b>   | <b>155.9</b>   | <b>148.7</b>   | <b>161.5</b>   | <b>165.1</b>   | <b>173.9</b>   | <b>169.6</b>   | <b>184.1</b>   | <b>186.2</b>   |
| <b>G to N</b>                 | <b>Services (excluding public administration)</b>  | <b>123.5</b>   | <b>136.0</b>   | <b>130.0</b>   | <b>140.2</b>   | <b>141.1</b>   | <b>150.4</b>   | <b>151.2</b>   | <b>159.5</b>   | <b>161.0</b>   | <b>170.0</b>   | <b>169.0</b>   | <b>178.5</b>   | <b>179.2</b>   |
| B                             | Mining and quarrying   | 123.0          | 153.6          | 124.0          | 139.3          | 140.1          | 149.5          | 144.0          | 141.9          | 141.5          | 165.5          | 145.2          | 166.3          | 167.7          |
| C                             | Manufacturing  | 130.5          | 139.8          | 134.2          | 146.3          | 152.2          | 157.2          | 152.6          | 164.4          | 170.4          | 176.5          | 175.4          | 188.5          | 192.5          |
| D                             | Electricity, gas, steam and air conditioning supply  | 115.2          | 151.0          | 114.4          | 144.2          | 134.8          | 156.5          | 128.3          | 157.5          | 148.3          | 165.5          | 146.0          | 168.5          | 158.5          |
| E                             | Water supply, sewerage, waste management and remediation activities                            | 114.4          | 135.3          | 122.2          | 129.9          | 133.2          | 145.6          | 140.3          | 150.6          | 151.9          | 164.9          | 163.3          | 174.5          | 175.4          |
| F                             | Construction   | 123.8          | 132.2          | 129.1          | 141.2          | 144.5          | 159.4          | 154.3          | 168.7          | 162.9          | 186.9          | 184.7          | 196.0          | 189.6          |
| G                             | Wholesale and retail trade; repair of motor vehicles and motorcycles                           | 124.7          | 136.8          | 130.9          | 140.7          | 141.9          | 152.3          | 153.0          | 163.2          | 164.1          | 175.0          | 170.6          | 181.1          | 181.7          |
| H                             | Transportation and storage   | 118.8          | 126.8          | 128.5          | 140.3          | 142.2          | 147.5          | 152.0          | 160.9          | 164.5          | 169.1          | 168.7          | 182.8          | 183.7          |
| I                             | Accommodation and food service activities  | 131.0          | 152.4          | 136.4          | 147.9          | 153.5          | 168.7          | 165.5          | 183.9          | 180.5          | 191.3          | 187.8          | 198.0          | 194.0          |
| J                             | Information and communication  | 125.8          | 137.5          | 130.0          | 141.5          | 140.4          | 148.8          | 149.1          | 153.1          | 155.7          | 161.5          | 162.7          | 166.7          | 168.4          |
| K                             | Financial and insurance activities   | 111.1          | 128.7          | 122.9          | 126.9          | 127.8          | 140.7          | 138.4          | 142.0          | 142.9          | 153.3          | 158.5          | 162.9          | 163.1          |
| L                             | Real estate activities   | 118.8          | 128.6          | 114.8          | 120.9          | 124.6          | 138.9          | 136.9          | 150.9          | 154.0          | 171.3          | 163.2          | 175.7          | 173.6          |

|   |   |       |       |       |       |       |       |       |       |       |       |       |       | (Per cent) |
|---|---|-------|-------|-------|-------|-------|-------|-------|-------|-------|-------|-------|-------|------------|
| M | Professional, scientific and technical activities             | 122.0 | 134.0 | 124.5 | 134.3 | 140.9 | 147.7 | 143.2 | 154.2 | 158.9 | 173.4 | 164.4 | 176.9 | 178.2      |
| N | Administrative and support service activities                 | 131.6 | 145.9 | 144.2 | 156.7 | 149.0 | 158.9 | 169.0 | 177.1 | 173.5 | 181.0 | 192.4 | 209.2 | 209.9      |
| O | Public administration and defence; compulsory social security | 137.8 | 140.0 | 124.6 | 133.4 | 155.7 | 167.5 | 144.9 | 169.6 | 171.7 | 182.1 | 155.8 | 197.2 | 199.6      |
| P | Education   | 171.8 | 128.7 | 103.2 | 118.6 | 209.1 | 150.6 | 122.2 | 150.0 | 227.3 | 171.5 | 135.9 | 172.9 | 257.2      |
| Q | Human health and social work activities                       | 124.5 | 137.4 | 122.0 | 133.6 | 137.4 | 147.1 | 140.7 | 154.8 | 157.8 | 164.9 | 156.9 | 173.3 | 173.0      |
| R | Arts, entertainment and recreation                            | 142.5 | 151.9 | 135.5 | 143.3 | 157.2 | 160.8 | 156.0 | 173.5 | 184.6 | 195.1 | 183.9 | 204.2 | 215.6      |
| S | Other service activities                                      | 128.5 | 134.2 | 126.6 | 136.5 | 141.4 | 144.5 | 153.8 | 166.2 | 173.4 | 178.4 | 173.1 | 189.3 | 195.3      |

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

\* Preliminary data.