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4 December 2025

Development of the Czech labour market in the Q3 2025

On the labour market, employees continued to move from the primary and the secondary sector to the sector of services and care. The employment was moderately increasing thanks to females; participation of males was dropping. The average wage increased in nominal terms by 7.1%, year-on-year (y-o-y), and in real terms by 4.5%, by which it smoothly followed the development both in this and the previous year.

Introduction

The Czech labour market seems to be stable and resistant for a long time, despite persisting imbalance expressed by a low unemployment rate and a low wage level at the same time as well as by a strong share of export-oriented industry depending on sales abroad. Nowadays, it faces many challenges related to aging of the domestic labour force, swift digitalisation, and structural incongruity, when available workers do not have required skills (digital, language, or professional) and therefore they do not conform to demands of enterprises for labour force. Mainly construction is confronted with a lack of qualified labour force. It makes more and more strongly formulated demand of enterprises for a massive import of labour force from abroad which, however, has consequences for the whole society as well as political consequences.

At the same time, the Czech labour market is very fragmented in terms of Regions, which results from lower fluctuation as well as from unavailability of housing in localities with an offer of quality jobs (central areas), whereas in frontier Regions, the unemployment is high and there are jobs with low earnings or of uncertain character.

For a long time, the number of workers has been decreasing in the primary and in the secondary sector since they were moving to services, mainly those with high requirements for professional skills, which places heavy demands on people to retrain (reskill). On top of that, there is newly an economic necessity to use advanced information technologies (AI, robotisation) when enterprises want to be able to succeed in international competition.

A high employment rate is a strength of the Czech labour market; it exceeds the European average by almost 7 percentage points (p. p.). It has been markedly increasing recently mainly in females where also integration of female war refugees from Ukraine was involved, whereas in males there was a moderate weakening especially in relation to a more difficult situation and dismissals in industrial fields.

Public services remain to be a weakness (education, health, public administration); inadequate levels of earnings are persisting there, which has an impact on the composition and inflow of labour force and, by extension, on quality. At the same time, demands on public services are rising significantly in relation to the above-mentioned challenges.

Employment, unemployment, and economic inactivity

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Current results of the Labour Force Sample Survey (LFSS) did not show marked changes in main trends. The total numbers of the employed as well as of the unemployed increased; however, it was predestined by demographic changes. Nevertheless, it does not mean that inner structures on the labour market did not change. The employment increased by 1.4%, y-o-y, i.e. by 74.8 thousand, to the total of 5 272.1 thousand. Whereas in the primary and in the secondary sector the number of working persons was rather decreasing (by 26 thousand in total), the tertiary sector significantly increased by 100.8 thousand. Therefore, already 62.8% of working persons currently worked in the sector of services and care.

The structure by sex also corresponded to that development: in females, who primarily work in the increasing tertiary sector, employment increased by 103.9 thousand, y-o-y. On the contrary, the number of working males dropped by 29.1 thousand. Males are strongly dominating in the heavy industry, which is in the doldrums.

The employment rate (the share of the number of working persons in the group of the 15–64 years old) increased by 0.2 p. p. to 76.0%. The male employment rate (80.4%) was by 1.1 p. p. lower, y-o-y, the female one increased by 1.7 p. p. to 71.5%.

The discrepancy between trends in entrepreneurs and employees did not repeat, all groups were growing. The number of employees increased by 51.4 thousand, y-o-y. In the self-employed without employees (own-account workers) the increase was by 20.7 thousand and in employers it was by 2.0 thousand. The share of entrepreneurs in the total employment thus was 15.7%.

The trend of development of part-time jobs continued; however, only in females. The number of people working part-time currently exceeded the level of half a million (504.3 thousand) when it increased by 12.0 thousand, year-on-year. As for males, their part-time jobs decreased by 5.7 thousand persons, in females they increased by 17.7 thousand. 14.5% of working females thus worked part-time.

The unemployment increased by 20.0 thousand persons, y-o-y; the number of persons seeking a job increased to 158.4 thousand. While in females the age group of the 30–44 years old prevailed (28.9 thousand), most of the unemployed males were in the age group of 15–24 years (23.9 thousand). The unemployment thus often affects young males after they finish or discontinue their education, whereas in females it is more typical after their return from parental leave.

The unemployment rate is gradually increasing; in the age group of the 15–64 years old it increased by 0.3 p. p., y-o-y, to 3.0%. In terms of Regions, the situation was the worst in the *Ústecký* Region (5.2%), in the *Karlovarský* Region (4.7%), and in the *Moravskoslezský* Region (4.5%). On the other hand, the unemployment rate remained the lowest in the *Středočeský* Region (1.8%) followed by Prague (the *Hl. m. Praha* Region) and by the *Vysočina* Region (both the same, 1.9%).

The number of the unemployed who were jobless for one year or over was 48.6 thousand, which was a year-on-year increase by 13.8 thousand. It is already a marked share (30.7%) of all the unemployed. The highest relative y-o-y increase in the long-term unemployed was recorded in the age group of 60+ years.

The surplus labour (persons who do not work, are not actively seeking a job, and therefore do not meet conditions of ILO for the unemployed, although they are declaring that they would like to work) decreased by 15.4 thousand to 76.4 thousand. The number of all the economically inactive aged 15+ years was 3 430.4 thousand; it was by 35.6 thousand less, year-on-year. Whereas the number of the inactive males increased by 23.4 thousand to 1 381.8 thousand, the number of inactive females was by 58.9 thousand lower and their number currently was 2 048.6 thousand.

Note: The LFSS only covers persons living in dwellings (flats), not those living in hostels and similar collective households. It has a negative influence on the capture of some groups of foreigners who often use such ways of housing. As of 2023, the methodology of weighting and grossing up in the LFSS was adapted to this type of survey, which had an impact on the time series of absolute data on employment, especially in the breakdown by age group. The LFSS weights are newly modified according to the results of demographic statistics every quarter.

Registered number of employees converted to full-time equivalent employees

Preliminary data of the CZSO's business statistics show a trend of an insignificant growth. The registered number of employees in full-time equivalent (FTE) increased, y-o-y, in the Q3 2025, by 10.8 thousand, which was a relative increase by 0.3%. (The registered number of employees as headcount increased more markedly, by 19.5 thousand or by 0.5% due to an increase in the share of part-time jobs.)

An increase in the number of employees concentrated again to the area of services and care in the Q3 2025, whereas decreases can be found in the primary sector and in manufacturing, also in 'transportation and storage' and in 'administrative and support service activities', which are closely tied to them. In six sections of the CZ-NACE, the number of employees decreased, y-o-y, by 25 thousand in total. On the other hand, in twelve sections it increased by almost 36 thousand. Individual relative increments or decrements ranged widely from -8.9% to 10.1%. All that proves that there are steep changes on the labour market. However, extreme changes were in economic activities that are insignificant in terms of numbers of their employees.

An absolute majority of the decrease is owing to 'manufacturing', in which there was a decrease by 16.2 thousand employees. In relative terms, it was a decrease by 1.5%, which was not that dramatic; however, the decrements have been accumulating already for many successive years. In the Q3 2018, it still had 1 156.2 thousand employees; currently it has 1 035.3 thousand, i.e. it was reduced by 120.9 thousand in total (or by 10.5%). In any case, 'manufacturing' is still the biggest economic activity in Czechia; it employed also in the Q3 2025, as the only section, over one million employees. The Tab. 1 in the news release on average wages therefore provides CZ-NACE divisions of this section, which were the biggest as for the number of employees. Except for one division, we can find decreases in the numbers of employees everywhere. The deepest slump both as for the number as well as in relative terms was in 'manufacture of motor vehicles, trailers and semi-trailers' (by 3.6%; 6 thousand). The only selected division with an increase in the number of employees was again ‘manufacture of food products’ (by 1.9%; 1.6 thousand).

The largest relative decrease in the number of employees was in the section of ‘mining and quarrying’, the already smallest section of the CZ-NACE as for the number of employees, in which the number of employees currently decreased by 8.9%. It was a decrease by 1.5 thousand to 15.6 thousand. In ‘agriculture, forestry and fishing,’ in which currently 89.9 thousand employees were employed, there was also a huge year-on-year decrease (by 1.8%; 1.6 thousand). The section of ‘transportation and storage’ remains to be an important economic activity with over a quarter of a million of employees (252.4 thousand); however, they decreased in number by 2.7 thousand, y-o-y (relatively by 1.1%). In ‘administrative and support service activities’, which are various agencies including those intermediating work, there was a decrease by the same number of employees, which was in relative expression a decrease by 1.5%. The last section with a negative value was ‘financial and insurance activities’ (by 0.4%; 0.3 thousand).

Two economic activities where the state plays a dominant role contributed the most to the increase in the number of employees: in ‘human health and social work activities’, the year-on-year growth was by 8.6 thousand (or by 2.4%) and in ‘education’ by 7.8 thousand (by 2.3%). This time, a marginal increase can also be found in the ‘public administration and defence; compulsory social security’ (by 0.9 thousand or 0.3%); this section is an economic activity that remains to be one of the most stable as for the numer of employees in Czechia for a long time. Otherwise, in these three economic activities of public services in total, over one million of employees work.

‘Real estate activities’ recorded the highest year-on-year relative increase by 10.1%, which in this smaller economic activity was an increase by 4.3 thousand. A relatively high increase was also in ‘other service activities’ (5.9%; 2.2 thousand).

In the section of ‘wholesale and retail trade; repair of motor vehicles and motorcycles’, there were by further 4.9 thousand more jobs (an increase by 1%), by which it exceeded a half a million threshold (501.6 thousand); it thus remains to be the second most numerous section in Czechia. Also ‘construction’ fared better again, the number of employees increased there by 2.4 thousand, year-on-year, or by 1.1%. Recovery in ‘accommodation and food service activities’ persisted; there were by 1.1 thousand employees more, y-o-y; it was an increase by 0.9%. As for the number, also the increase in the section of ‘professional, scientific and technical activities’ was the same (in relative terms it was by 0.6%). In ‘information and communication’, the increase in the number of employees is constant; currently it only increased by 0.6 thousand (by 0.5%).

Two smaller economic activities of industry were increasing; in the energy sector (‘electricity, gas, steam and air conditioning supply’), the number of employees slightly increased by 0.1 thousand (by 0.0%) and in ‘water supply; sewerage, waste management and remediation activities’ even by 1.2 thousand (by 2.2%).

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Quarterly average gross monthly wages

According to preliminary data, the average wage (CZK 48 295) nominally increased, year-on-year, by CZK 3 194 in the Q3 2025, i.e. by 7.1%. It is an average of a diverse development on the level of individual economic activities (industries), enterprises, or organisations. The current wage growth thus fits in the context of the last three years when in 2023 and 2024 the wage growth was the same 7.2% and for the first half-year of 2025 it was also by 7.1%.

However, as for employees, the real development was more important that compares nominal growth of earnings with the growth of consumer prices, i.e. with inflation. The real wage shows how many goods and services an employee could buy for his/her wage. The consumer price index reached in the Q3 2025 the value of 2.5%; the average wage thus increased in real terms by 4.5%, y-o-y. It is also a result that is roughly comparable to this year's first half-year (4.4%) and to the whole year 2024, when the real wage increased by 4.7%. At the same time, it is completely incomparable to the preceding two years 2022 and 2023, when the purchase power of earnings of employees drastically slumped in real terms due to high inflation, by an eighth in total (12.3%).

Although average wages increased in all industries (economic activities), their dynamics was again very variable. The highest nominal y-o-y increase (11.4%) can be currently found in the section of 'professional, scientific and technical activities', in which the average wage reached CZK 60 710. It is followed with a gap by a wage increase in 'arts, entertainment and recreation' by 9.8% and in 'construction' by 9.5%.

The following were also close to the nine-percent growth threshold: 'transportation and storage' (8.9%), 'real estate activities' (8.8%), and 'agriculture, forestry and fishing' (8.6%). They were followed by the section of 'accommodation and food service activities' with 8.3% and 'administrative and support service activities' with 8.2% growth.

On the other hand, in 'electricity, gas, steam and air conditioning supply' only a three-percent year-on-year increase is observed. Also, in 'mining and quarrying' wages only increased by 3.9% and in 'water supply; sewerage, waste management and remediation activities' by 4.2%. Other sections ranged in the inteval from 5 to 8 per cent.

The highest wage level in the Q3 2025 can be found as usual in 'information and communication', in which the average wage reached CZK 87 786. 'Financial and insurance activities' section ranked second already with a considerable gap with its level of CZK 74 699; 'electricity, gas, steam and air conditioning supply' is the third with CZK 68 291. Those three have been leading for the long term, already since the beginning of the century. However, up until 2012, it was definitely the section of 'financial and insurance activities' that had the highest wage level.

From the opposite side, the average wage despite a rather marked relative increase (by 8.3%) was still the lowest in 'accommodation and food service activities' (CZK 29 625). The second lowest average wage was in 'administrative and support service activities' (CZK 35 212). The third lowest were ‘other service activities’ with CZK 36 603 and ‘agriculture, forestry and fishing’ was the fourth with the average wage of CZK 39 057.

From CZ-NACE divisions of ‘manufacturing’ published in the Tab. 1 in the news release on average wages, we can find the highest level in ‘manufacture of motor vehicles, trailers and semi-trailers’ (CZK 53 780), whereas in ‘manufacture of food products’, the average wage only was CZK 38 515; the difference thus was over CZK 15 thousand.

Development in Regions

In terms of the number of employees, there was a year-on-year decrease in most of the Regions in the Q3 2025. An increase only occurred in three Regions. Again, a massive increase in Prague (by 19 thousand), which represented a relative increase by 2.3%, considerably contributed to balancing the overall balance. Much smaller increases were recorded by the *Středočeský* Region (by 2.5 thousand; 0.6%) and by the *Jihomoravský* Region (2.4 thousand; 0.5%).

On the other hand, the most marked decrease by 4.3 thousand or by 1.0% was in the *Moravskoslezský* Region. Rather significant relative decreases by 0.8% can be found in the *Liberecký* Region and in the *Karlovarský* Region, by 0.7% in the *Královéhradecký* Region, in the *Zlínský* Region, and in the *Jihočeský* Region.

As for the development of average wages, the dispersion is substantially smaller among Regions than in the breakdown by economic activity (industry) in the Q3 2025. Wages were increasing nominally in the range from 5.4% to 7.9%. The highest wage growth was also in the Capital City of Prague (the *Hl. m. Praha* Region; 7.9%), which was followed with some gap by the *Jihomoravský* Region with 7.3% and then by the *Moravskoslezský* Region with 7.1%. In other Regions, the increase was below average. The *Liberecký* Region currently fared the worst; the average wage only increased there by 5.4%. In the *Karlovarský* Region, wages increased by 6.0% and in the *Ústecký* Region by 6.1%.

According to the absolute level of earnings, Prague continues to be the richest (in terms of earnings) of the Regions of Czechia. The average wage there was CZK 61 129. The *Středočeský* Region reached the second position with CZK 47 965; the *Jihomoravský* Region ranked third with CZK 47 641. The threshold of CZK 45 thousand was also exceeded by the *Plzeňský* Region (CZK 45 439), other Regions remained below the threshold. On the other hand, the *Karlovarský* Region remained to be the Region with the lowest wage level (CZK 41 675) and the only one currently below the CZK 43 thousand threshold. In the *Moravskoslezský* Region, which is following Prague, the *Jihomoravský* Region, and the *Středočeský* Region a Region with the fourth highest number of employees (411.7 thousand), the average wage reached the value of CZK 43 930.

Median wages and decile intervals of wages by sex

The news release of the CZSO for the Q3 2025 also contains a piece of data on the median wage, which is calculated from a mathematical model of the distribution. It shows the wage of a middle employee, i.e. a common wage level. Extreme deciles were also calculated and data for the previous period have been revised. In the Q3 2025, the median wage got to CZK 42 901, which is by 6.2% (CZK 2 523) more than in the corresponding period of the previous year.

One tenth of employees with the lowest wages were receiving a gross wage below CZK 22 559 (the bottom decile increased by 7.4%, y-o-y), whereas the tenth with the highest wages had wages over CZK 82 064 (the top decile increased by 6.1%). The decile ratio decreased by 0.04 p. p. and reached the value of 3.64. The lowest wages were increasing the most.

Male median wages were higher than female ones; in the Q3 2025, the female median wage was CZK 40 059 (it increased by 6.2%, year-on-year), whereas the male median wage was CZK 45 502 (it increased by 6.3%). The gap between median earnings by sex thus reached 12.0%.

At the same time, wages of males were distributed over a substantially wider interval, especially the area of high earnings was significantly higher for males than for females: the top decile for females was CZK 75 663 and for males it was CZK 88 479, by which there was a gap of 14.5% in high earnings. On the other hand, in low earnings, the difference was weaker: the bottom decile for females was CZK 21 742 and for males it was CZK 23 285, which is a gap of 6.6%.

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