



جباتن قرانچن ايكونومي دان ستاتيسٲك

DEPARTMENT OF ECONOMIC PLANNING AND STATISTICS

MINISTRY OF FINANCE AND ECONOMY

BRUNEI DARUSSALAM

SERVICES SALES INDEX

THIRD QUARTER 2025
(2019=100)



SERVICES SALES INDEX THIRD QUARTER (Q3) 2025

The Services Sales Index (SSI) measures the movements of selected business services activities. It serves as a leading economic indicator of the services performance in the private sector as well as consumer spending behavior.

Year-on-Year Change
Jul-Sep 2025 | Jul-Sep 2024

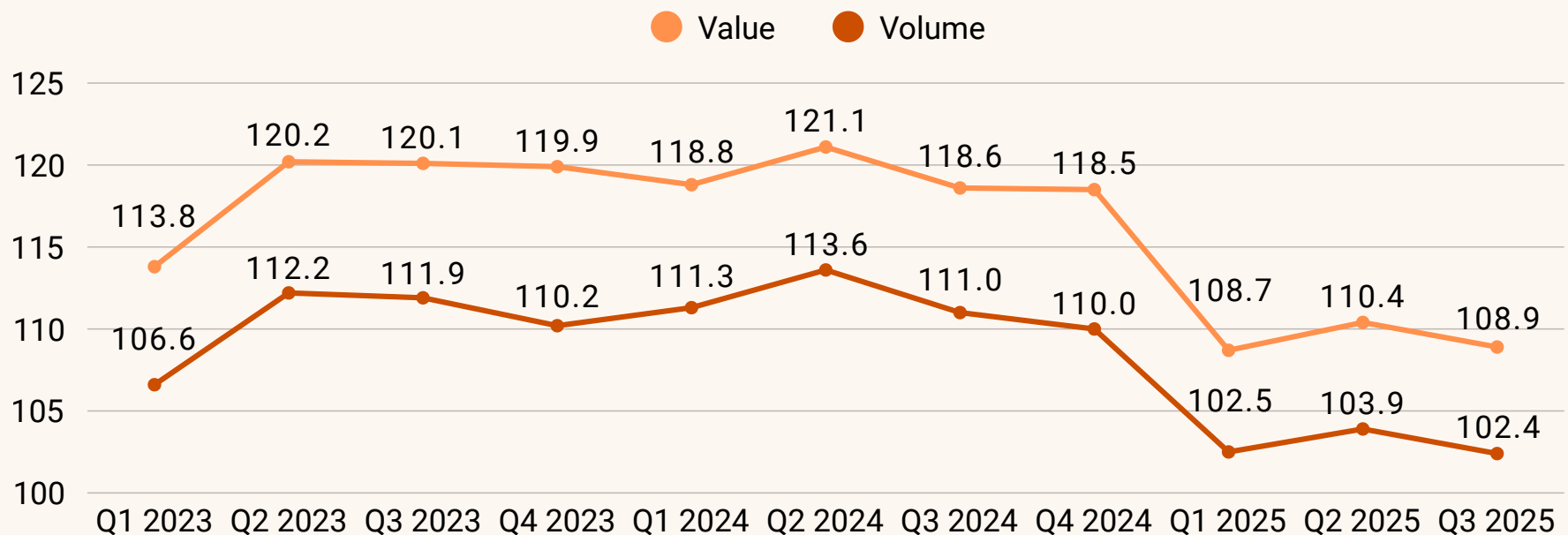
VALUE

▼ -8.2%

VOLUME

▼ -7.8%

INDEX TREND (Q1 2023 – Q3 2025)



VALUE OF SALES: BND2,278.5 MILLION

Highlights

In the third quarter (Q3) 2025, services sales recorded a negative growth of 8.2 per cent year-on-year, after decreasing by 8.8 per cent in Q2 2025. On a quarter-on-quarter basis, services sales recorded a decrease by 1.4 per cent following an increase of 1.6 per cent in Q2 2025.

The total value of services sales in Q3 2025 was estimated at BND2,278.5 million, where 56.6 per cent of it was contributed by Wholesale and Retail Trade with sales worth BND1,290.4 million.

In terms of volume, services sales recorded a negative growth of 7.8 per cent year-on-year in Q3 2025, after decreasing by 8.6 per cent in Q2 2025. On a quarter-on-quarter basis, services sales recorded a negative growth of 1.4 per cent after increasing by 1.4 per cent in Q2 2025 (**Table 1**).

Table 1: Services Sales Index (SSI), Q3 2025

	Index (2019=100)			Change (%)	
	Q3 2024	Q2 2025	Q3 2025	Q3 2025 / Q3 2024	Q3 2025 / Q2 2025
Sales value	118.6	110.4	108.9	-8.2	-1.4
Sales volume	111.0	103.9	102.4	-7.8	-1.4

Notes: *p* = provisional *r* = revised *y-o-y* = year on year *q-o-q* = quarter on quarter

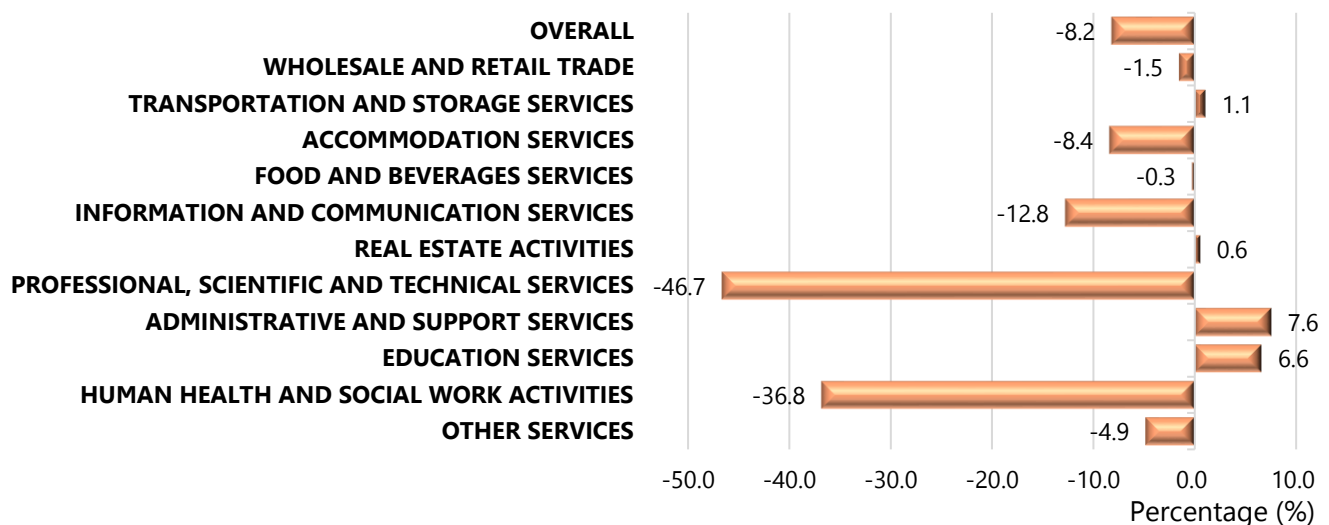
Year-On-Year Change

Sales Value

In terms of value, services sales recorded a decrease of 8.2 per cent in Q3 2025 compared to Q3 2024.

The lower demand in Q3 2025 was reflected in the decrease in sales revenue of Professional, Scientific and Technical Services 46.7 per cent; Human Health and Social Work Activities 36.8 per cent; Information and Communication Services 12.8 per cent; Wholesale and Retail Trade 1.5 per cent; and Accommodation Services 8.4 per cent (**Figure 1**).

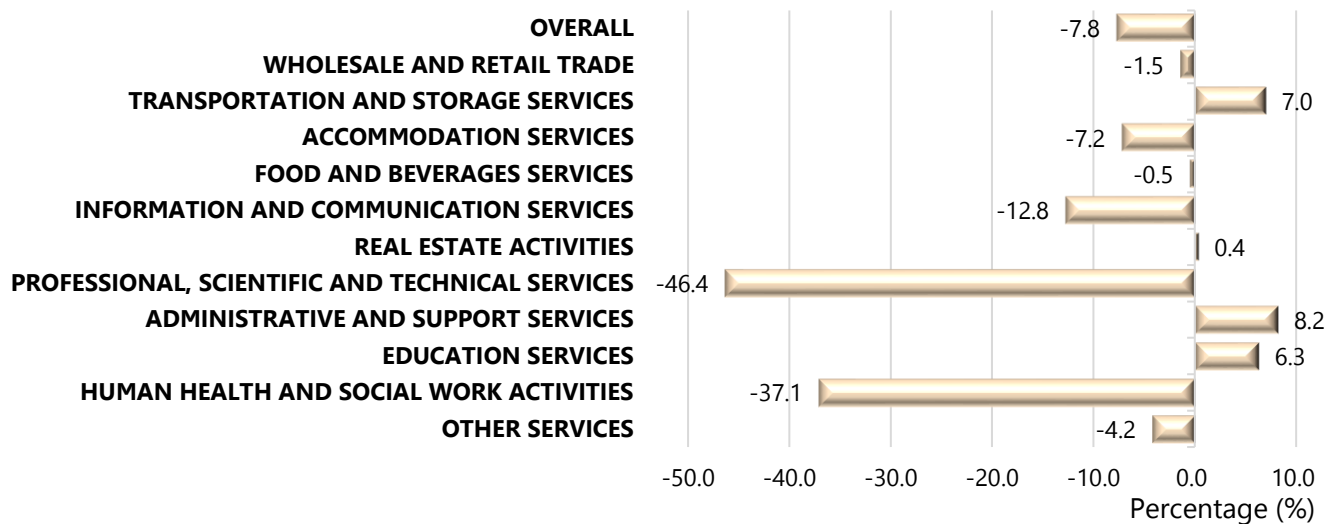
Figure 1: Services Sales Index Year-on-Year Value Change, Q3 2025



Sales Volume

In terms of volume, services sales volume recorded a decrease of 7.8 per cent in Q3 2025 compared to Q3 2024. This was mainly attributed to the decrease in the sales volume of Professional, Scientific and Technical Services 46.4 per cent; sales volume of Human Health and Social Work Activities 37.1 per cent; sales volume of Information and Communication Services 12.8 per cent; sales volume of Wholesale and Retail Trade 1.5 per cent; and sales volume of Accommodation Services 7.2 per cent (**Figure 2**).

Figure 2: Services Sales Index Year-on-Year Volume Change, Q3 2025



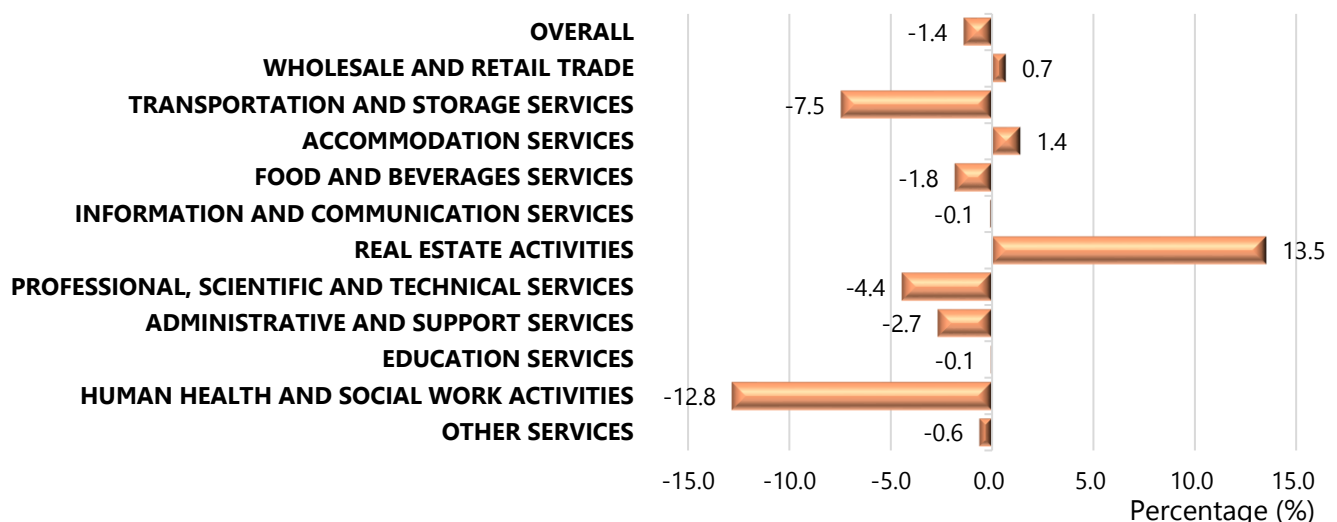
Quarter-On-Quarter Change

Sales Value

In terms of value, services sales recorded a decrease of 1.4 per cent in Q3 2025 compared to Q2 2025.

Almost three-quarters of the services activities recorded negative growths, among the highest included Transportation and Storage Services 7.5 per cent; Human Health and Social Work Activities 12.8 per cent; Professional, Scientific and Technical Services 4.4 per cent; Administrative and Support Services 2.7 per cent; and Food and Beverages Services 1.8 per cent (**Figure 3**).

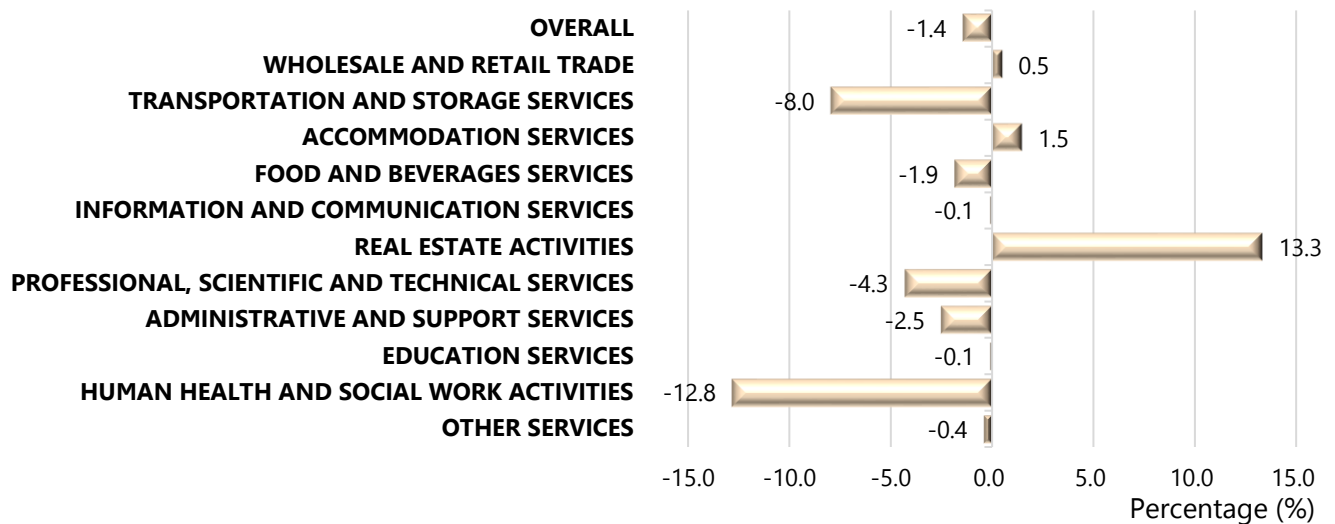
Figure 3: Services Sales Index Quarter-on-Quarter Value Change, Q3 2025



Sales Volume

In terms of volume, services sales volume recorded a decrease of 1.4 per cent in Q3 2025 compared to Q2 2025. This was mainly attributed to the decrease in the sales volume of Transportation and Storage Services 8.0 per cent; sales volume of Human Health and Social Work Activities 12.8 per cent; sales volume of Professional, Scientific and Technical Services 4.3 per cent; sales volume of Administrative and Support Services 2.5 per cent; and sales volume of Food and Beverages Services 1.9 per cent (**Figure 4**).

Figure 4: Services Sales Index Quarter-on-Quarter Volume Change, Q3 2025



TECHNICAL NOTES

Introduction

Services refers to activities related to the services sector which provides intangible goods and services rather than physical products. It includes a wide range of activities where value is created through providing services to households, businesses or the government. Services sector is one of the important sectors that contributes to Brunei Darussalam's economy, accounting for nearly 75 per cent of the number of enterprises; employing around 67 per cent of the workforce; and generating about 39 per cent of the total operating revenue of the private sector in 2019.

The Services Sales Index (SSI) measures the movements of selected services activities. It serves as a leading economic indicator of the selected services sector performance as well as consumer spending behavior.

Scope and Coverage

The Services activities are classified in accordance with the Brunei Darussalam Standard Industrial Classification (BDSIC) 2011 under Sections listed below, which is based on the United Nation's International Standard Industrial Classification (ISIC), Revision 4.

Section	Section Description
G	Wholesale and retail trade
H	Transportation and storage
I	Accommodation and food service activities
J	Information and communication
L	Real estate activities
M	Professional, scientific and technical activities
N	Administrative and support service activities
P	Education
Q	Human health and social work activities
R	Arts, entertainment and recreation
S	Other service activities

Data Sources

SSI is compiled using data from the Quarterly Survey of Businesses (QSB) conducted by the Department of Economic Planning and Statistics (JPES) every quarter. A sample of 1,931 enterprises are covered in the QSB for services activities.

The weight for each activity reflects its relative importance in the overall services sector. The weights are computed based on the services sales of each activity obtained from the Annual Census of Enterprises (ACE) for reference year 2019.

Index Compilation

The overall SSI is a weighted average of indices at the detailed activity level. The sales index at the activity level is derived by aggregating the sales value of enterprises belonging to the same activity and dividing it by the average quarterly sales for the same activity in the base year (2019). The overall SSI is then computed by summing all the weighted activities indices using the Laspeyres formula.

The indices and percentage changes will be published to one decimal place in the SSI reports. However, the computation of percentage changes is based on the unrounded index values.

The indices are reported both in value and volume terms. The indices in value terms measure the changes in sales value which may be due to changes in both price and quantity. The indices in volume terms measure the changes in volume of the services activities. These are done by removing the price effect by adjusting the nominal value using price deflators of the reference quarter.

Revision Policy

Revisions will only be made to the published figures for the previous periods if there are any changes based on the latest available data.

Annex 1: Quarterly Services Sales Index (2019 = 100), Value

No.	Description	Weights	2019	Q1 2023	Q2 2023	Q3 2023	Q4 2023	2023	Q1 2024	Q2 2024	Q3 2024	Q4 2024	2024	Q1 2025	Q2 2025	Q3 2025
1	Wholesale and retail trade	5,500	100.0	114.4	119.1	117.1	119.1	117.4	120.1	119.1	113.9	119.1	118.0	115.1	111.4	112.1
2	Transportation and storage services	1,199	100.0	86.7	86.9	97.9	99.5	92.8	93.7	90.3	98.9	106.1	97.3	92.5	108.0	99.9
3	Accommodation services	85	100.0	83.1	80.6	91.3	95.4	87.6	90.4	81.2	84.0	92.7	87.1	73.6	75.9	76.9
4	Food and beverages services	458	100.0	120.6	122.6	126.7	124.2	123.5	121.2	122.0	123.1	126.3	123.2	116.6	125.1	122.8
5	Information and communication services	746	100.0	132.8	132.8	135.9	128.0	132.4	137.3	124.9	131.5	118.5	128.0	123.3	114.8	114.7
6	Real estate activities	161	100.0	101.4	93.4	91.6	90.0	94.1	93.7	88.6	91.8	90.7	91.2	83.9	81.3	92.3
7	Professional, scientific and technical services	683	100.0	135.9	192.3	154.5	156.7	159.8	144.5	186.6	174.3	129.7	158.8	88.4	97.3	92.9
8	Administrative and support services	437	100.0	101.4	96.7	121.6	119.3	109.7	102.0	120.0	106.3	115.9	111.1	100.0	117.5	114.4
9	Education services	233	100.0	101.2	96.2	98.7	89.5	96.4	104.6	100.7	102.0	102.8	102.5	108.4	108.8	108.7
10	Human health and social work activities	434	100.0	136.4	142.2	158.5	142.4	144.9	136.3	152.4	157.1	146.4	148.1	95.9	113.8	99.2
11	Other services	64	100.0	113.3	125.3	118.2	120.5	119.3	119.7	123.1	120.6	120.5	121.0	111.7	115.5	114.8
	Total	10,000	100.0	113.8	120.2	120.1	119.9	118.5	118.8	121.1	118.6	118.5	119.3	108.7	110.4	108.9

Annex 2: Quarterly Services Estimated Value of Sales (BND Million)

No.	Description	Weights	2019	Q1 2023	Q2 2023	Q3 2023	Q4 2023	2023	Q1 2024	Q2 2024	Q3 2024	Q4 2024	2024	Q1 2025	Q2 2025	Q3 2025
1	Wholesale and retail trade	5,500	4,603.3	1,316.8	1,370.1	1,348.0	1,370.8	5,405.7	1,381.7	1,371.0	1,310.6	1,370.3	5,433.6	1,324.5	1,281.6	1,290.4
2	Transportation and storage services	1,199	1,003.6	217.5	218.2	245.6	249.7	930.9	235.1	226.7	248.1	266.3	976.2	232.0	270.9	250.7
3	Accommodation services	85	71.2	14.8	14.3	16.2	17.0	62.3	16.1	14.4	14.9	16.5	62.0	13.1	13.5	13.7
4	Food and beverages services	458	383.4	115.6	117.5	121.4	119.1	473.5	116.1	116.9	118.0	121.1	472.1	111.7	119.9	117.7
5	Information and communication services	746	624.4	207.3	207.3	212.2	199.8	826.5	214.3	195.0	205.2	185.0	799.5	192.5	179.2	179.0
6	Real estate activities	161	135.1	34.3	31.5	30.9	30.4	127.1	31.6	29.9	31.0	30.6	123.2	28.3	27.5	31.2
7	Professional, scientific and technical services	683	571.6	194.2	274.8	220.8	224.0	913.7	206.4	266.7	249.0	185.4	907.6	126.3	139.0	132.8
8	Administrative and support services	437	365.5	92.7	88.3	111.1	109.0	401.1	93.2	109.7	97.1	105.9	405.9	91.3	107.4	104.5
9	Education services	233	194.9	49.3	46.9	48.1	43.6	187.9	51.0	49.1	49.7	50.1	199.8	52.8	53.0	53.0
10	Human health and social work activities	434	363.1	123.8	129.1	143.9	129.3	526.1	123.7	138.3	142.6	132.9	537.5	87.0	103.3	90.1
11	Other services	64	53.8	15.2	16.8	15.9	16.2	64.2	16.1	16.5	16.2	16.2	65.0	15.0	15.5	15.4
	Total	10,000	8,369.8	2,381.4	2,514.7	2,514.0	2,508.8	9,918.9	2,485.3	2,534.3	2,482.4	2,480.3	9,982.4	2,274.7	2,310.8	2,278.5

Annex 3: Year-On-Year Growth Rate of Quarterly Services Sales Index (2019 = 100) (Per cent %), Value

No.	Description	Weights	Q1 2023	Q2 2023	Q3 2023	Q4 2023	2023	Q1 2024	Q2 2024	Q3 2024	Q4 2024	2024	Q1 2025	Q2 2025	Q3 2025	
			Changes												Changes	Contribution
1	Wholesale and retail trade	5,500	3.1	-0.5	3.6	3.9	2.5	4.9	0.1	-2.8	0.0	0.5	-4.1	-6.5	-1.5	9.9
2	Transportation and storage services	1,199	11.7	2.1	-6.9	13.8	4.4	8.1	3.9	1.0	6.7	4.9	-1.3	19.5	1.1	-1.3
3	Accommodation services	85	1.2	16.7	13.8	13.6	11.1	8.9	0.8	-8.0	-2.9	-0.6	-18.6	-6.5	-8.4	0.6
4	Food and beverages services	458	24.4	17.9	10.9	7.8	14.8	0.5	-0.5	-2.8	1.7	-0.3	-3.8	2.6	-0.3	0.1
5	Information and communication services	746	6.4	-1.3	3.5	-3.3	1.2	3.4	-5.9	-3.3	-7.4	-3.3	-10.2	-8.1	-12.8	12.8
6	Real estate activities	161	35.1	-24.8	-37.8	-41.6	-24.8	-7.7	-5.1	0.2	0.8	-3.1	-10.4	-8.3	0.6	-0.1
7	Professional, scientific and technical services	683	16.8	15.1	3.8	4.6	9.8	6.3	-2.9	12.8	-17.2	-0.7	-38.8	-47.9	-46.7	57.0
8	Administrative and support services	437	34.1	23.9	34.4	13.3	25.6	0.6	24.2	-12.6	-2.8	1.2	-2.0	-2.1	7.6	-3.6
9	Education services	233	3.7	-2.0	1.7	0.1	0.9	3.3	4.7	3.3	14.8	6.3	3.6	8.0	6.6	-1.6
10	Human health and social work activities	434	18.8	15.6	26.7	4.9	16.2	-0.1	7.1	-0.9	2.8	2.2	-29.7	-25.3	-36.8	25.8
11	Other services	64	17.3	19.3	-1.7	3.7	9.0	5.7	-1.8	2.1	0.0	1.4	-6.7	-6.2	-4.9	0.4
	Total	10,000	8.3	3.1	4.1	3.9	4.7	4.4	0.8	-1.3	-1.1	0.6	-8.5	-8.8	-8.2	100.0

Annex 4: Quarter-On-Quarter Growth Rate of Quarterly Services Sales Index (2019 = 100) (Per cent %), Value

No.	Description	Weights	Q1 2023	Q2 2023	Q3 2023	Q4 2023	Q1 2024	Q2 2024	Q3 2024	Q4 2024	Q1 2025	Q2 2025	Q3 2025	
			Changes										Changes	Contribution
1	Wholesale and retail trade	5,500	-0.2	4.0	-1.6	1.7	0.8	-0.8	-4.4	4.6	-3.3	-3.2	0.7	-27.2
2	Transportation and storage services	1,199	-0.9	0.3	12.6	1.7	-5.8	-3.6	9.4	7.4	-12.9	16.8	-7.5	62.5
3	Accommodation services	85	-1.1	-3.0	13.3	4.5	-5.2	-10.2	3.5	10.3	-20.6	3.1	1.4	-0.6
4	Food and beverages services	458	4.6	1.7	3.4	-2.0	-2.5	0.7	0.9	2.6	-7.7	7.3	-1.8	6.8
5	Information and communication services	746	0.4	0.0	2.4	-5.8	7.3	-9.0	5.2	-9.9	4.1	-6.9	-0.1	0.5
6	Real estate activities	161	-34.1	-7.9	-1.9	-1.7	4.1	-5.4	3.5	-1.2	-7.5	-3.1	13.5	-11.5
7	Professional, scientific and technical services	683	-9.3	41.5	-19.6	1.4	-7.8	29.2	-6.6	-25.6	-31.9	10.0	-4.4	19.2
8	Administrative and support services	437	-3.7	-4.7	25.8	-1.9	-14.5	17.7	-11.4	9.1	-13.8	17.5	-2.7	8.9
9	Education services	233	13.1	-5.0	2.6	-9.3	16.8	-3.7	1.2	0.9	5.4	0.4	-0.1	0.1
10	Human health and social work activities	434	0.5	4.2	11.5	-10.2	-4.3	11.8	3.1	-6.8	-34.5	18.7	-12.8	41.0
11	Other services	64	-2.5	10.6	-5.7	1.9	-0.6	2.8	-2.0	-0.1	-7.3	3.4	-0.6	0.3
	Total	10,000	-1.4	5.6	0.0	-0.2	-0.9	2.0	-2.0	-0.1	-8.3	1.6	-1.4	100.0

Annex 5: Quarterly Services Sales Volume Index (2019 = 100), Volume

No.	Description	Weights	2019	Q1 2023	Q2 2023	Q3 2023	Q4 2023	2023	Q1 2024	Q2 2024	Q3 2024	Q4 2024	2024	Q1 2025	Q2 2025	Q3 2025
1	Wholesale and retail trade	5,500	100.0	106.5	111.2	108.9	110.7	109.3	112.2	110.9	106.3	111.3	110.2	107.8	104.1	104.7
2	Transportation and storage services	1,199	100.0	72.3	68.5	78.5	68.6	71.8	76.1	77.2	81.1	80.9	78.9	79.9	94.2	86.7
3	Accommodation services	85	100.0	114.5	113.9	126.3	134.0	122.2	123.7	110.9	116.4	126.5	119.4	103.0	106.4	108.0
4	Food and beverages services	458	100.0	113.3	114.8	118.6	116.2	114.6	113.1	113.6	114.5	117.4	113.5	108.4	116.0	113.9
5	Information and communication services	746	100.0	137.0	137.3	141.7	135.7	137.9	145.6	132.7	139.7	125.9	136.0	131.1	122.0	121.9
6	Real estate activities	161	100.0	97.4	89.6	87.9	87.9	90.7	92.5	87.5	90.6	89.5	90.0	82.8	80.2	90.9
7	Professional, scientific and technical services	683	100.0	126.5	177.9	143.1	144.3	148.0	134.4	173.8	162.1	120.1	147.6	82.4	90.8	86.9
8	Administrative and support services	437	100.0	94.4	89.4	112.6	109.9	101.6	94.9	111.8	98.9	107.3	103.2	93.2	109.8	107.0
9	Education services	233	100.0	98.3	93.4	95.9	87.0	93.7	101.5	97.7	98.9	99.7	99.5	104.8	105.2	105.1
10	Human health and social work activities	434	100.0	130.5	136.1	148.9	132.5	137.0	126.6	141.5	145.9	136.0	137.5	88.7	105.2	91.7
11	Other services	64	100.0	106.1	116.7	110.1	111.6	111.1	112.0	115.3	113.0	112.3	113.1	104.8	108.7	108.2
	Total	10,000	100.0	106.6	112.2	111.9	110.2	110.2	111.3	113.6	111.0	110.0	111.5	102.5	103.9	102.4

Annex 6: Year-On-Year Growth Rate of Quarterly Services Sales Index (2019 = 100) (Per cent %), Volume

No.	Description	Weights	Q1 2023	Q2 2023	Q3 2023	Q4 2023	2023	Q1 2024	Q2 2024	Q3 2024	Q4 2024	2024	Q1 2025	Q2 2025	Q3 2025	
			Changes												Changes	Contribution
1	Wholesale and retail trade	5,500	1.1	-1.6	3.1	3.3	1.4	5.4	-0.3	-2.4	0.5	0.8	-3.9	-6.1	-1.5	10.0
2	Transportation and storage services	1,199	40.1	20.8	13.8	11.8	20.4	5.2	12.6	3.3	17.9	9.8	5.0	22.0	7.0	-7.9
3	Accommodation services	85	-2.6	11.6	9.6	5.2	5.8	8.0	-2.6	-7.9	-5.6	-2.3	-16.7	-4.1	-7.2	0.8
4	Food and beverages services	458	19.2	13.7	9.2	7.0	11.9	-0.2	-1.1	-3.5	1.0	-0.9	-4.2	2.1	-0.5	0.3
5	Information and communication services	746	9.7	2.0	7.3	-0.1	4.6	6.3	-3.4	-1.4	-7.2	-1.4	-9.9	-8.1	-12.8	15.4
6	Real estate activities	161	30.7	-24.3	-37.4	-40.7	-24.9	-5.0	-2.4	3.1	1.8	-0.8	-10.4	-8.3	0.4	-0.1
7	Professional, scientific and technical services	683	16.7	15.2	4.6	4.2	10.0	6.3	-2.3	13.3	-16.8	-0.3	-38.7	-47.7	-46.4	59.5
8	Administrative and support services	437	34.1	24.0	35.5	12.9	25.8	0.5	25.0	-12.2	-2.3	1.6	-1.7	-1.8	8.2	-4.1
9	Education services	233	2.9	-2.8	0.9	-0.7	0.1	3.2	4.6	3.1	14.7	6.2	3.3	7.7	6.3	-1.7
10	Human health and social work activities	434	19.5	16.3	25.1	2.0	15.4	-3.0	4.0	-2.0	2.6	0.3	-29.9	-25.6	-37.1	27.2
11	Other services	64	17.4	19.6	-0.8	3.5	9.2	5.6	-1.2	2.6	0.6	1.8	-6.5	-5.7	-4.2	0.4
	Total	10,000	8.8	3.9	6.1	3.1	5.3	4.5	1.3	-0.8	-0.2	1.2	-7.9	-8.6	-7.8	100.0

Annex 7: Quarter-On-Quarter Growth Rate of Quarterly Services Sales Index (2019 = 100) (Per cent %), Volume

No.	Description	Weights	Q1 2023	Q2 2023	Q3 2023	Q4 2023	Q1 2024	Q2 2024	Q3 2024	Q4 2024	Q1 2025	Q2 2025	Q3 2025	
			Changes										Changes	Contribution
1	Wholesale and retail trade	5,500	-0.6	4.5	-2.1	1.6	1.4	-1.1	-4.2	4.7	-3.1	-3.4	0.5	-19.5
2	Transportation and storage services	1,199	17.8	-5.2	14.5	-12.5	10.9	1.4	5.0	-0.2	-1.2	17.9	-8.0	59.8
3	Accommodation services	85	-10.0	-0.6	10.9	6.1	-7.7	-10.3	4.9	8.7	-18.6	3.3	1.5	-0.9
4	Food and beverages services	458	4.3	1.3	3.3	-2.1	-2.7	0.4	0.8	2.6	-7.7	7.1	-1.9	6.5
5	Information and communication services	746	0.8	0.3	3.2	-4.2	7.3	-8.9	5.3	-9.9	4.1	-6.9	-0.1	0.5
6	Real estate activities	161	-34.3	-7.9	-1.9	0.0	5.2	-5.4	3.5	-1.2	-7.5	-3.2	13.3	-11.5
7	Professional, scientific and technical services	683	-8.7	40.7	-19.5	0.8	-6.9	29.3	-6.7	-25.9	-31.3	10.2	-4.3	17.7
8	Administrative and support services	437	-3.0	-5.2	25.9	-2.4	-13.6	17.8	-11.5	8.5	-13.1	17.7	-2.5	8.0
9	Education services	233	12.3	-5.0	2.6	-9.3	16.7	-3.7	1.2	0.9	5.1	0.4	-0.1	0.1
10	Human health and social work activities	434	0.5	4.2	9.4	-11.0	-4.5	11.8	3.1	-6.8	-34.8	18.7	-12.8	38.9
11	Other services	64	-1.6	10.0	-5.6	1.4	0.4	2.9	-2.0	-0.6	-6.7	3.7	-0.4	0.2
	Total	10,000	-0.4	5.3	-0.3	-1.5	1.0	2.1	-2.3	-0.9	-6.8	1.4	-1.4	100.0