

# SeeNews

Business Intelligence  
for Southeast Europe



## Industry Report

Social work activities without  
accommodation

2018

BULGARIA

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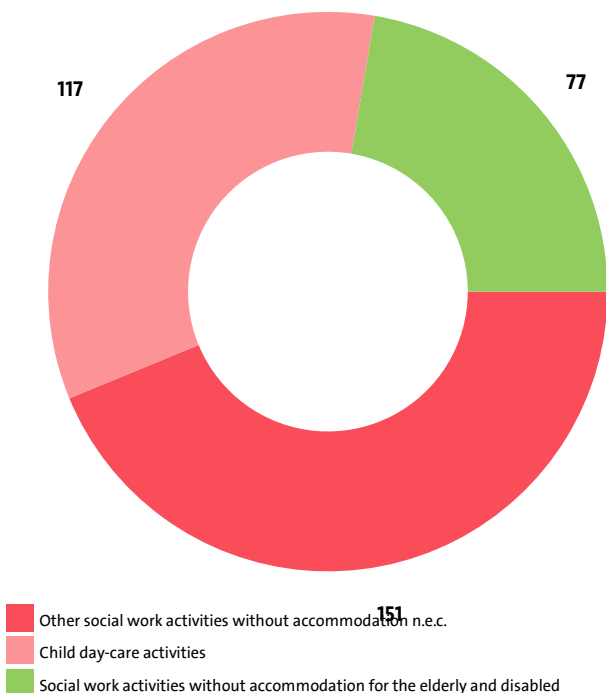
# I. KEY INDICATORS

- The Social work activities without accommodation industry in Bulgaria was represented by 345 companies at the end of 2018, compared to 328 in the previous year and 324 in 2016.
- The industry's net profit amounted to BGN 2,335,000 in 2018.
- The industry's total revenue was BGN 57,727,000 in 2018, up by 11.48% compared to the previous year.
- The combined costs of the companies in the Social work activities without accommodation industry reached BGN 54,844,000 in 2018, up by 15.83% year-on-year.
- The industry's total revenue makes up 0.06% to the country's Gross domestic product (GDP) in 2018, compared to 0.05% for 2017 and 0.05% in 2016.
- A total of 1,597 people were employed in the Social work activities without accommodation industry in 2018, compared to 1,538 in 2017 and 1,375 in 2016.
- Most of the companies in the industry are based in Sofia, followed by Plovdiv and Varna.

# II. INTRODUCTION

In 2018 the companies in the Social work activities without accommodation industry numbered 345, distributed in 3 sectors.

INDUSTRY STRUCTURE BY SECTORS AND NUMBER OF COMPANIES



In 2017 there were a total of 328 companies operating in the

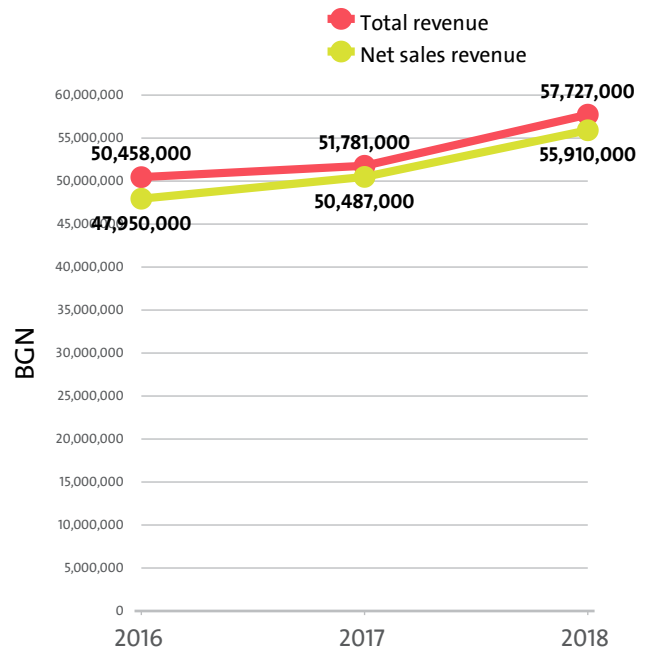
industry. In 2016 their number totalled 324.

NUMBER OF COMPANIES IN SOCIAL WORK ACTIVITIES WITHOUT ACCOMMODATION INDUSTRY BY SECTORS

SECTOR	2018	2017	2016
OTHER SOCIAL WORK ACTIVITIES WITHOUT ACCOMMODATION N.E.C.	151	131	126
CHILD DAY-CARE ACTIVITIES	117	116	111
SOCIAL WORK ACTIVITIES WITHOUT ACCOMMODATION FOR THE ELDERLY AND DISABLED	77	81	87

# III. REVENUES

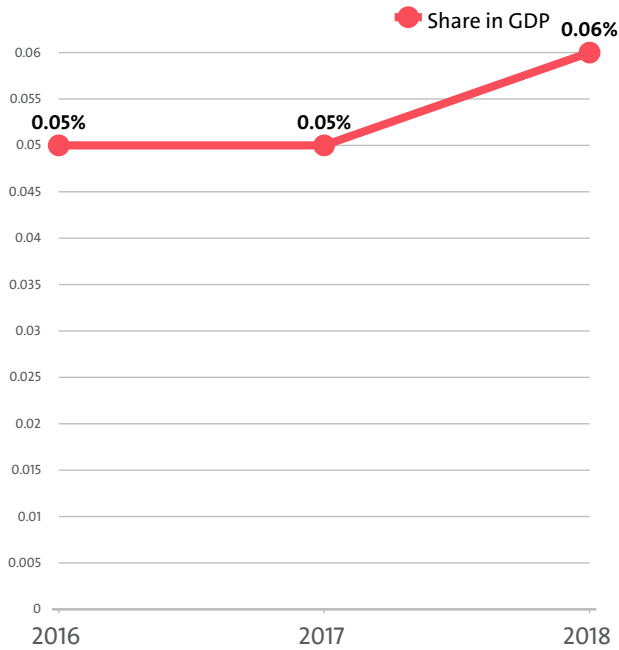
The total revenue in the industry was BGN 57,727,000 in 2018, BGN 51,781,000 in 2017 and 50,458,000 in 2016.



The companies in the Social work activities without accommodation market of Bulgaria earned combined net sales revenues of BGN 55,910,000 in 2018.

In annual terms, sales marked a rise of 10.74% compared to 2017. In comparison to 2016 they went up by 16.60%. In 2017 sales went up by 5.29% year-on-year.

The Social work activities without accommodation industry total revenue make up 0.06% to the country's GDP in 2018, compared to 0.05% for 2017 and 0.05% in 2016.



In 2018 the Social work activities without accommodation industry contributed to GDP BGN 47,471,000 in Gross value added (GVA) accounting for 0.03% of the total for the country's economy.

In the previous year, the industry's GVA amounted BGN 42,414,000, accounting for 0.02% of the total for the country in 2017. In 2016 the GVA of the Social work activities without accommodation was BGN 36,216,000, or 0.02% of the GVA for the country's economy.

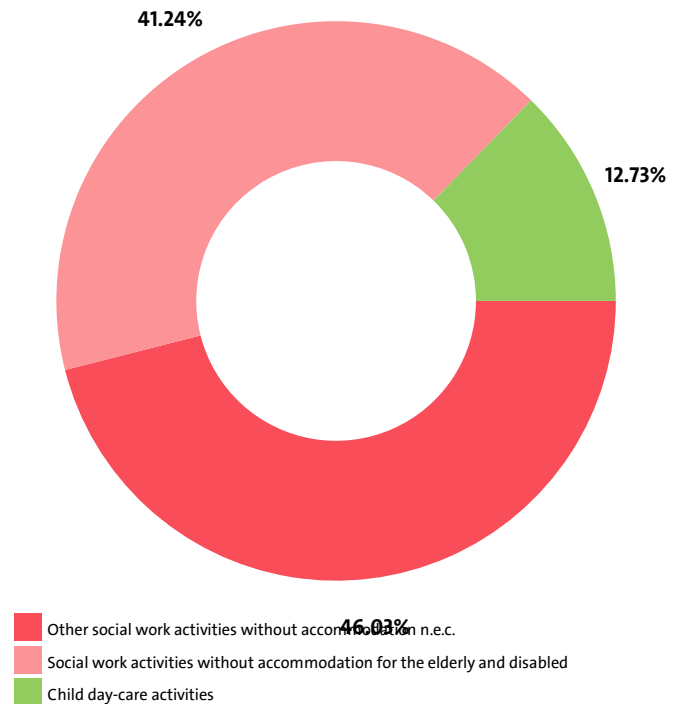
#### GVA BY SECTORS

RANK	SECTOR	BGN	SHARE OF THE COUNTRY'S GVA (%)
1	OTHER SOCIAL WORK ACTIVITIES WITHOUT ACCOMMODATION N.E.C.	20,518,000	0.01
2	SOCIAL WORK ACTIVITIES WITHOUT ACCOMMODATION FOR THE ELDERLY AND DISABLED	19,713,000	0.01
3	CHILD DAY-CARE ACTIVITIES	7,240,000	0.00

We expect, based on the trend in the last three years, the total revenue of the Social work activities without accommodation industry to change at a compound annual growth rate (CAGR) of 6.96% in 2019.

Other social work activities without accommodation n.e.c. contributed net sales revenue of BGN 25,737,000 or 46.03% of the total net sales in the industry, sector Social work activities without accommodation for the elderly and disabled - BGN 23,057,000 (41.24%), and sector Child day-care activities - BGN 7,116,000 (12.73%).

#### INDUSTRY'S NET SALES REVENUE STRUCTURE BY SECTORS



The highest growth, of 24.41%, was recorded by Social work activities without accommodation for the elderly and disabled, while Other social work activities without accommodation n.e.c. registered the sharpest decline, of 1.20%.

#### TOP COMPANIES' REVENUE BY SECTORS

SEGMENT	COMPANY	TOTAL REVENUE (BGN)	NET SALES REVENUE (BGN)
<b>CHILD DAY-CARE ACTIVITIES</b>			
	AVS DETSKI TSENTAR OOD	1,102,000	1,102,000
	KINDER OASE OOD	777,000	549,000
	PRIVATE MONTESSORI KINDERGARTEN OTKRIVATEL OOD	674,000	659,000
<b>OTHER SOCIAL WORK ACTIVITIES WITHOUT ACCOMMODATION N.E.C.</b>			
	PROFIASSIST 24 7 EOOD	5,550,000	5,499,000
	TSKA 93 EOOD	2,438,000	2,438,000
	ARBEITSVERMITTLUNG EU PERSONAL SOFIA GMBH EOOD	2,117,000	2,117,000
<b>SOCIAL WORK ACTIVITIES WITHOUT ACCOMMODATION FOR THE ELDERLY AND DISABLED</b>			
	ASISTENT-24 EOOD	3,165,000	3,154,000
	PFLEGE CONNECT EOOD	2,524,000	2,522,000
	B - BETREUER OOD	2,075,000	2,072,000

The top 10 companies in terms of total revenue in Social work activities without accommodation accounted for 43.03% of the industry's total in 2018, 44.20% in 2017 and 53.68% in 2016.

### TOP 10 COMPANIES BY TOTAL AND NET SALES REVENUE IN THE INDUSTRY

RANK	COMPANY	TOTAL REVENUE (BGN)	NET SALE REVENUE (BGN)
1	PROFIASSIST 24 7 EOOD	5,550,000	5,499,000
2	ASISTENT-24 EOOD	3,165,000	3,154,000
3	PFLEGE CONNECT EOOD	2,524,000	2,522,000
4	TSKA 93 EOOD	2,438,000	2,438,000
5	ARBEITSVERMITTLUNG EU PERSONAL SOFIA GMBH EOOD	2,117,000	2,117,000
6	B - BETREUER OOD	2,075,000	2,072,000
7	MLADEZHKO RAZVITIE I ZAKRILA EOOD	1,881,000	1,880,000
8	LAVATO 2016 EOOD	1,713,000	1,689,000
9	BSB-24 OOD	1,691,000	1,689,000
10	PCAS OOD	1,685,000	1,685,000

The total revenues of the top 10 companies in the Social work activities without accommodation were 0.03% of GDP in 2018, compared to 0.02% for 2017 and 0.03% in 2016.

The top 10 by assets in the Social work activities without accommodation sector made up BGN 10,963,000, or 19.61% of the total net sales revenue.

### TOP 10 BY TOTAL ASSETS IN THE INDUSTRY

RANK	COMPANY	BGN
1	WONDER VALLEY OOD	2,321,000
2	MLADEZHKA POMOSHT SHUMEN EOOD	1,546,000
3	TRUDOVO - LECHEBNO STOPANSTVO EOOD	1,452,000
4	HEPI AYS EOOD	1,225,000
5	B - BETREUER OOD	1,085,000
6	PROFIASSIST 24 7 EOOD	1,041,000
7	MLADEZHKO RAZVITIE I ZAKRILA EOOD	708,000
8	MOLENBURG EOOD	654,000
9	AVS DETSKI TSENTAR OOD	625,000
10	LIDEYA YURAP EOOD	583,000

### TOP 10 COMPANIES WITH HIGHEST ANNUAL GROWTH IN OPERATING REVENUE IN SOCIAL WORK ACTIVITIES WITHOUT ACCOMMODATION

RANK	COMPANY	V/Y GROWTH
1	DZZD DA PAZEL	2600.00%
2	TSENTAR ZA SPORTNA MEDITSINA SPARTAK EOOD	2000.00%
3	SK 07 EOOD	1754.55%
4	DETSKI TSENTAR DIANA EOOD	1300.00%
5	ANALYSING MINDS EOOD	1133.33%
6	EURO PERSONAL SERVICE 3 EOOD	903.85%
7	DIRA M EOOD	800.00%
8	CHASTNA DETSKA GRADINA TATKOVA GRADINA EOOD	540.00%
9	TRUDOVO - LECHEBNO STOPANSTVO EOOD	483.22%
10	ADELI PERSONAL CONSULT EOOD	402.17%

### TOP 10 COMPANIES BY TOTAL REVENUE IN THE MARKET CHILD DAY-CARE ACTIVITIES WERE:

COMPANY	BGN
AVS DETSKI TSENTAR OOD	1,102,000
KINDER OASE OOD	777,000
PRIVATE MONTESSORI KINDERGARTEN OTKRIVATEL OOD	674,000
PRIVATE KINDERGARTEN GERMANI BG EAD	547,000
CHASTNA DETSKA GRADINA ESPA EOOD	369,000
DOMA EOOD	301,000
CHASTNA DETSKA GRADINA SLAVEYCHE EOOD	293,000

CHASTNA DETSKA GRADINA PRIATELSKA KASHTA EOOD	170,000
ANN-MARY 2010 EOOD	147,000
CHASTNA DETSKA GRADINA D R PETAR BERON EOOD	116,000

The 10 largest companies in terms of total revenue in sector Child day-care activities earned total revenue of BGN 4,496,000 and accounted for 7.79% of the industry's total revenue.

### TOP 10 COMPANIES BY TOTAL REVENUE IN THE MARKET OTHER SOCIAL WORK ACTIVITIES WITHOUT ACCOMMODATION N.E.C. WERE:

COMPANY	BGN
PROFIASSIST 24 7 EOOD	5,550,000
TSKA 93 EOOD	2,438,000
ARBEITSVERMITTLUNG EU PERSONAL SOFIA GMBH EOOD	2,117,000
MLADEZHKO RAZVITIE I ZAKRILA EOOD	1,881,000
BSB-24 OOD	1,691,000
PCAS OOD	1,685,000
MOMTRADE RUSE OOD	1,629,000
RENATO GROUP OOD	1,333,000
REYA CARE EOOD	711,000
VURDIGES ALTERN EOOD	648,000

The 10 largest companies in terms of total revenue in sector Other social work activities without accommodation n.e.c. earned total revenue of BGN 19,683,000 and accounted for 34.10% of the industry's total revenue.

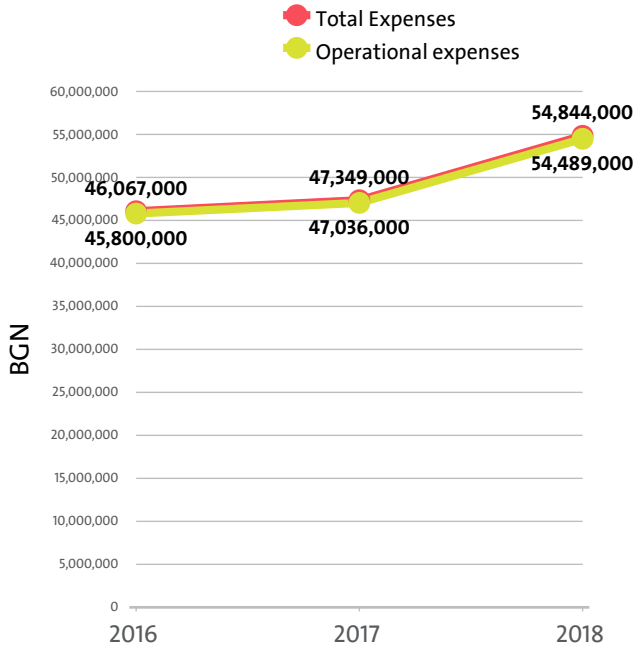
### TOP 10 COMPANIES BY TOTAL REVENUE IN THE FIELD SOCIAL WORK ACTIVITIES WITHOUT ACCOMMODATION FOR THE ELDERLY AND DISABLED WERE:

COMPANY	BGN
ASISTENT-24 EOOD	3,165,000
PFLEGE CONNECT EOOD	2,524,000
B - BETREUER OOD	2,075,000
LAVATO 2016 EOOD	1,713,000
VELEVI OOD	1,341,000
PRIM 1000 EOOD	1,254,000
ANTO-AN BG EOOD	1,202,000
LIDER STAR EOOD	1,065,000
FUL MIKS EOOD	988,000
MEDATIO EOOD	987,000

The 10 largest companies in terms of total revenue in sector Social work activities without accommodation for the elderly and disabled earned total revenue of BGN 16,314,000 and accounted for 28.26% of the industry's total revenue.

## IV. EXPENSES

The combined costs of the companies in the Social work activities without accommodation industry reached BGN 54,844,000 in 2018.



In annual terms, total expenses rose by 15.83% compared to 2017 and increased by 19.05% in comparison to 2016.

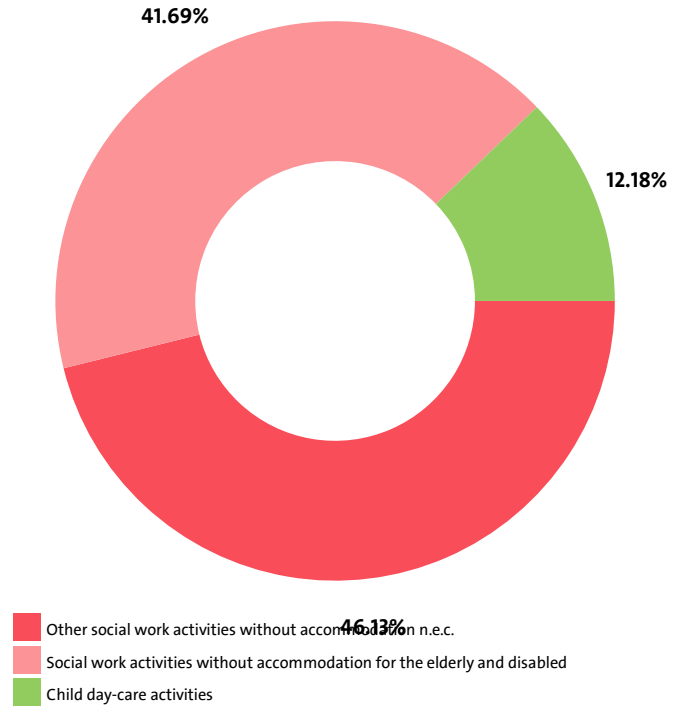
The total operating expenses of the companies in the Social work activities without accommodation industry were BGN 54,489,000 in 2018.

Operating costs grew by 15.85% compared with the previous year and grew by 18.97% when compared to 2016.

We expect, based on the trend in the last three years, the total costs of the Social work activities without accommodation industry to change at a compound annual growth rate (CAGR) of 9.11% in 2019.

Other social work activities without accommodation n.e.c. reported the highest total costs, of BGN 25,300,000, followed by Social work activities without accommodation for the elderly and disabled with BGN 22,866,000 and Child day-care activities with total costs of BGN 6,678,000.

INDUSTRY'S TOTAL COSTS STRUCTURE BY SECTORS

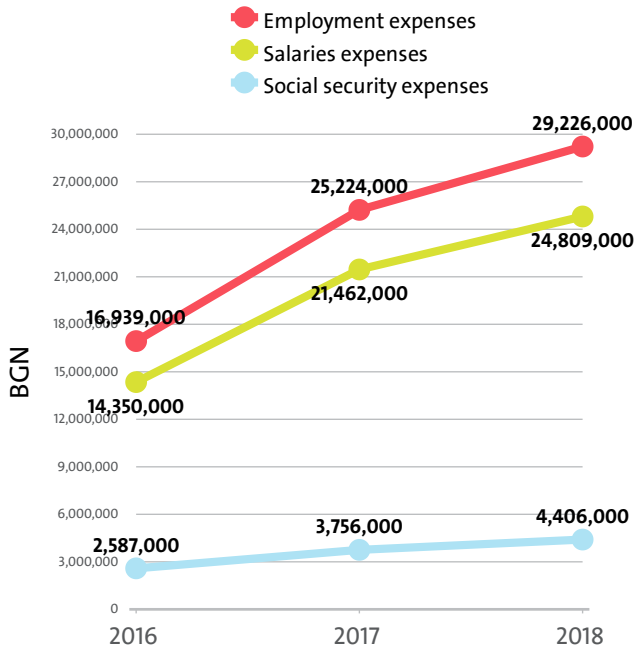


Social work activities without accommodation for the elderly and disabled marked the highest annual increase in total expenses, of 27.99%.

In terms of operating expenses, the highest growth, of 27.76%, was recorded by the Social work activities without accommodation for the elderly and disabled sector.

The biggest spenders in the industry, with costs of over 10% of industry's costs, numbered 31, including VELEVI OOD, WONDER VALLEY OOD, ARBEITSVERMITTLUNG EU PERSONAL SOFIA GMBH EOOD, EURO PERSONAL SERVICE 2 EOOD, AVS DETSKI TSENTAR OOD. The medium spenders, or those in the 5% and 10% range count 13 and include CHASTNA DETSKA GRADINA ESPA EOOD, CHASTNA DETSKA GRADINA SLAVEYCHE EOOD, ESKULAP 2009 OOD, MOLENBURG EOOD, LACHEZAR DANKOV ET. Below 5% threshold are 301 companies, including INSTITUT PO SOTSIALNI DEYNOSTI I PRAKTIKI EOOD, RIKHS EOOD, KV KIDS EOOD, RAYANA 2000 OOD, TERAPEVTICHEN CENTAR SVETULKA 1 EOOD.

Employment expenses in the Social work activities without accommodation industry increased by 15.87% on the year to BGN 29,226,000 in 2018.



The highest growth in labour costs, of 36.01%, was registered by Child day-care activities.

The monthly costs per employee in the Social work activities without accommodation industry averaged BGN 1,525 in 2018, BGN 1,367 in 2017 and BGN 1,027 in 2016.

The monthly social security costs per employee in the industry averaged BGN 230 in 2018, versus BGN 204 in 2017 and BGN 157 in 2016.

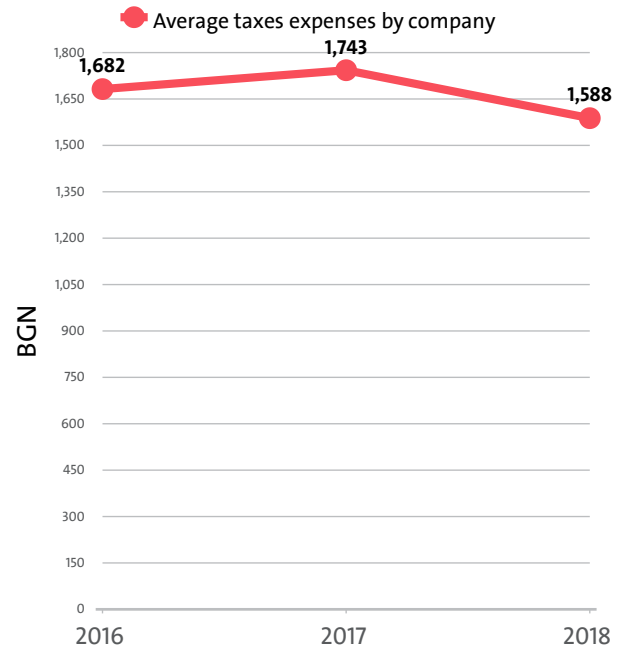
#### EMPLOYMENT EXPENSES IN SOCIAL WORK ACTIVITIES WITHOUT ACCOMMODATION BY SECTORS IN 2018

RANK	SECTOR	EMPLOYMENT EXPENSES (BGN)	AVERAGE EXPENSES PER EMPLOYEE (BGN)
1	OTHER SOCIAL WORK ACTIVITIES WITHOUT ACCOMMODATION N.E.C.	13,128,000	16,167
2	SOCIAL WORK ACTIVITIES WITHOUT ACCOMMODATION FOR THE ELDERLY AND DISABLED	13,001,000	25,745
3	CHILD DAY-CARE ACTIVITIES	3,097,000	11,061

#### THE TOP 10 COMPANIES BY AVERAGE MONTHLY COSTS PER EMPLOYEE IN THE INDUSTRY

RANK	COMPANY	BGN
1	MOLENBURG EOOD	3,333
2	EURO PERSONAL SERVICE 3 EOOD	3,283
3	ESKULAP 2009 OOD	3,200
4	LAVATO 2016 EOOD	3,142
5	ANTO-AN BG EOOD	3,098
6	EURO PERSONAL SERVICE 2 EOOD	2,937
7	PFLIGE CONNECT EOOD	2,854
8	LAVATO EOOD	2,806
9	KALIVA-VP EOOD	2,800
10	PRIM 1000 EOOD	2,771

The industry's tax expenses stood at BGN 548,000 in 2018. In 2017 it paid taxes of BGN 572,000. In 2016 the industry paid BGN 545,000 in taxes.

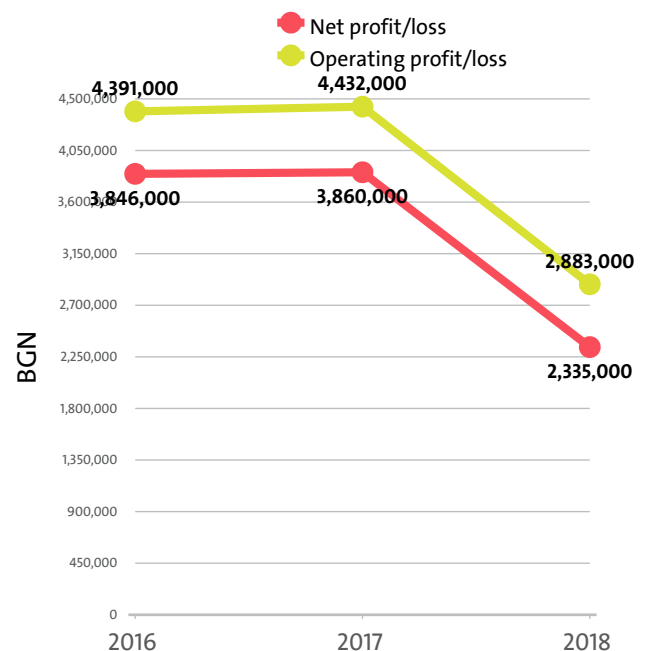


#### EXPENSES ON TAXES BY SECTORS

RANK	SECTOR	BGN	Y/Y CHANGE
1	OTHER SOCIAL WORK ACTIVITIES WITHOUT ACCOMMODATION N.E.C.	260,000	-32.47%
2	SOCIAL WORK ACTIVITIES WITHOUT ACCOMMODATION FOR THE ELDERLY AND DISABLED	197,000	62.81%
3	CHILD DAY-CARE ACTIVITIES	91,000	37.88%

## V. PROFITABILITY

The industry's net profit amounted to BGN 2,335,000 in 2018, compared to a net profit of BGN 3,860,000 in 2017 and a net profit of BGN 3,846,000 in 2016.



#### TOP 10 COMPANIES BY HIGHEST NET PROFIT IN SOCIAL WORK ACTIVITIES WITHOUT ACCOMMODATION

RANK	COMPANY	BGN
1	PROFIASSIST 24 7 EOOD	628,000
2	MLADEZHKO RAZVITIE I ZAKRILA EOOD	610,000
3	B - BETREUER OOD	337,000
4	AVS DETSKI TSENTAR OOD	264,000
5	ANTO-AN BG EOOD	208,000
6	KINDER OASE OOD	186,000
7	RENATO GROUP OOD	131,000
8	LIDER STAR EOOD	118,000
9	TRUDOVO - LECHEBNO STOPANSTVO EOOD	117,000
10	PCAS OOD	108,000

#### TOP COMPANIES BY HIGHEST NET LOSS IN SOCIAL WORK ACTIVITIES WITHOUT ACCOMMODATION

RANK	COMPANY	BGN
1	ADELI PERSONAL CONSULT EOOD	616,000
2	WONDER VALLEY OOD	542,000
3	BETREUER OOD	293,000
4	ALTENPFLEGE EOOD	248,000
5	MOLENBURG EOOD	87,000

The combined operating earnings of the companies in the Social work activities without accommodation sector fell by 34.95% y/y to BGN 2,883,000 in 2018.

#### OPERATING PROFIT/LOSS BY SECTORS (BGN)

SECTOR	2018	2017	2016
SOCIAL WORK ACTIVITIES WITHOUT ACCOMMODATION FOR THE ELDERLY AND DISABLED	1,268,000	1,505,000	1,948,000
CHILD DAY-CARE ACTIVITIES	848,000	503,000	218,000
OTHER SOCIAL WORK ACTIVITIES WITHOUT ACCOMMODATION N.E.C.	767,000	2,424,000	2,225,000

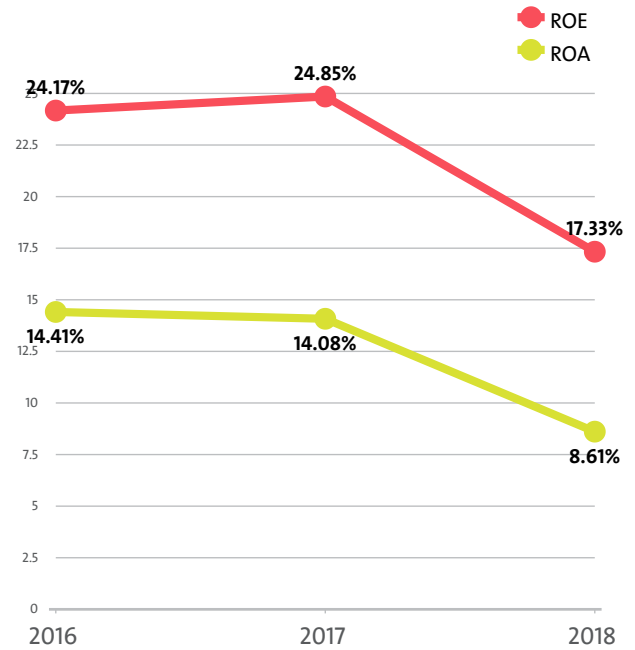
The profit margin for the Social work activities without accommodation industry stood at 5.00% in 2018, while in 2017 it amounted to 8.65% and 9.02% in 2016.

#### PROFIT MARGIN BY SECTORS

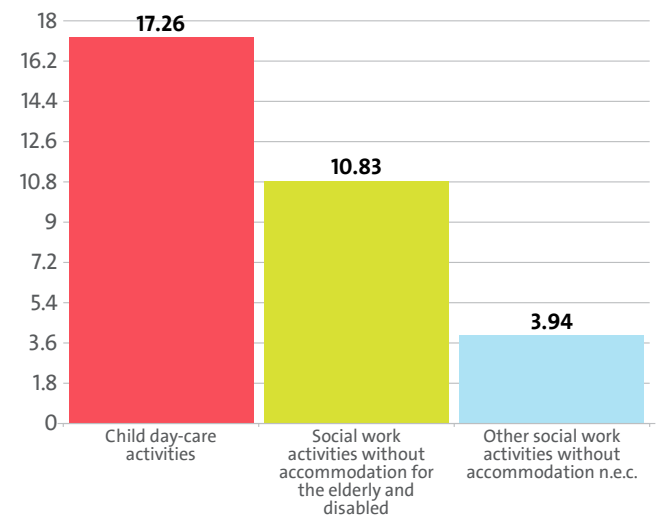
RANK	SECTOR	PROFIT MARGIN
1	CHILD DAY-CARE ACTIVITIES	11.35%
2	SOCIAL WORK ACTIVITIES WITHOUT ACCOMMODATION FOR THE ELDERLY AND DISABLED	5.26%
3	OTHER SOCIAL WORK ACTIVITIES WITHOUT ACCOMMODATION N.E.C.	2.95%

The Social work activities without accommodation industry's return on equity (ROE) is 17.33% compared to 24.85% in 2017 and 24.17% in 2016.

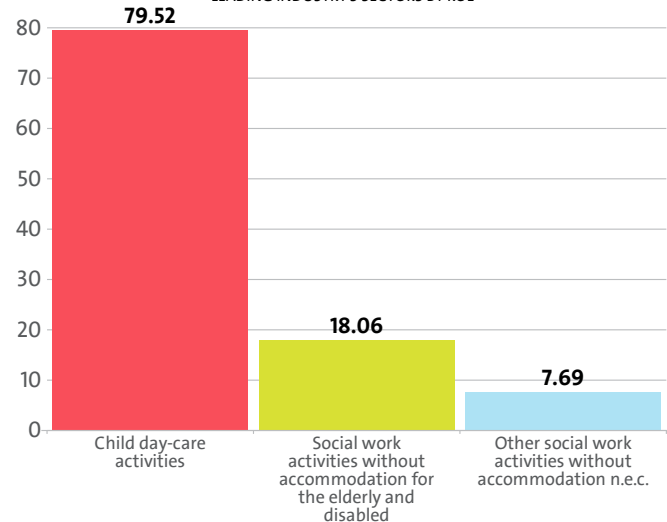
The Social work activities without accommodation's return on assets (ROA) was 8.61%, while in 2017 it amounted to 14.08% and 14.41% in 2016.



#### LEADING INDUSTRY'S SECTORS BY ROA



#### LEADING INDUSTRY'S SECTORS BY ROE





**TOP 10 COMPANIES BY HIGHEST AVERAGE NET PROFIT PER EMPLOYEE IN SOCIAL WORK ACTIVITIES WITHOUT ACCOMMODATION**

RANK	COMPANY	BGN	COMPANY HEADQUARTERS (CITY)
1	M58 EOOD	41,000	PERNIK
2	CHASTNA DETSKA GRADINA D R PETAR BERON EOOD	39,000	SOFIA
3	AVICENA - D EOOD	34,000	BURGAS
4	KIARA - A - R - V EOOD	30,000	SOFIA
5	TRUDOVO - LECHEBNO STOPANSTVO EOOD	29,250	SOFIA
6	EKO PRIME EOOD	23,000	SOFIA
7	DOMASHNI GRIZHI DIA BURGAS EOOD	20,500	BURGAS
8	ANALYSING MINDS EOOD	20,000	SOFIA
9	DOMUS AUXILIUM EOOD	19,000	KYUSTENDIL
10	IVAN FARTUNOV EOOD	15,000	GABROVO

About 50.00% of the 10 leading companies in terms of net profit per employee are located in SOFIA, while 30.00% are BURGAS-based and 10.00% are headquartered in KYUSTENDIL.

The average net sales revenue per employee in the Social work activities without accommodation industry amounted to BGN 35,009 in 2018, up by 6.65% compared to 2017 and up by 0.39% compared to 2016.

The industry's average operating revenue per employee rose by 8.33% year-on-year in 2018 to BGN 36,077. It increased by 1.92% compared to 2016.

The Social work activities without accommodation sector generated an average BGN 36,147 in total revenue per employee. In 2017 and 2016 the figure was BGN 33,668 and BGN 36,697, respectively.

The average total revenue per company in the Social work activities without accommodation industry rose to BGN 167,325 in 2018 from BGN 157,869 in 2017. The 2016 value was BGN 155,735.

A company in the Social work activities without accommodation industry made on average a net sales revenue of BGN 162,058 in 2018, compared to BGN 153,924 in 2017 and BGN 147,994 in 2016.

The Social work activities without accommodation industry made 0.02% of the overall sales country-wide.

Operating profit per employee for the industry as a whole was BGN 1,805 in 2018. For comparison in 2017 it amounted to BGN 2,882 and BGN 2,882 in 2016.

**THE TOP BY OPERATIONAL PROFIT PER EMPLOYEE IN SOCIAL WORK ACTIVITIES WITHOUT ACCOMMODATION**

RANK	COMPANY	BGN
1	CHASTNA DETSKA GRADINA D R PETAR BERON EOOD	43,000
2	TRUDOVO - LECHEBNO STOPANSTVO EOOD	42,000
3	M58 EOOD	41,000
4	AVICENA - D EOOD	40,000
5	KIARA - A - R - V EOOD	33,000

**TOP 10 COMPANIES WITH HIGHEST CORRELATION OPERATING REVENUE - NUMBER OF EMPLOYEES - EMPLOYMENT EXPENSES\***

RANK	COMPANY NAME	CORRELATION (BGN)
1	TRUDOVO - LECHEBNO STOPANSTVO EOOD	201,500
2	VAYLET 17 EOOD	188,000
3	PLAM MEDIKAL EOOD	143,000
4	DOMASHNI GRIZHI DIA BURGAS EOOD	111,000
5	M58 EOOD	102,000
6	ALTENPFLEGE - ELI PALAKARCHEVA ET	88,500
7	AVICENA - D EOOD	86,000
8	DARDIMAN EOOD	79,000
9	NEO VITA STM OOD	78,000
10	LACHEZAR DANKOV ET	63,714

\*The correlation is calculated by subtracting the quotient of the operating profit, and the employment expenses to the number of employees.

**AVERAGE REVENUES PER EMPLOYEE IN SOCIAL WORK ACTIVITIES WITHOUT ACCOMMODATION IN 2018**

SECTOR	AVERAGE NET SALES REVENUE (BGN)	AVERAGE OPERATING REVENUE (BGN)	AVERAGE TOTAL REVENUE (BGN)	NUMBER OF EMPLOYEES
CHILD DAY-CARE ACTIVITIES	25,414	26,693	26,879	280
OTHER SOCIAL WORK ACTIVITIES WITHOUT ACCOMMODATION N.E.C.	31,696	32,073	32,102	812
SOCIAL WORK ACTIVITIES WITHOUT ACCOMMODATION FOR THE ELDERLY AND DISABLED	45,657	47,719	47,790	505

**AVERAGE REVENUE PER COMPANY IN SOCIAL WORK ACTIVITIES WITHOUT ACCOMMODATION IN 2018**

SECTOR	AVERAGE NET SALES REVENUE (BGN)	AVERAGE OPERATING REVENUE (BGN)	AVERAGE TOTAL REVENUE (BGN)	NUMBER OF COMPANIES
SOCIAL WORK ACTIVITIES WITHOUT ACCOMMODATION FOR THE ELDERLY AND DISABLED	299,442	312,961	313,429	77
OTHER SOCIAL WORK ACTIVITIES WITHOUT ACCOMMODATION N.E.C.	170,444	172,470	172,629	151
CHILD DAY-CARE ACTIVITIES	60,821	63,880	64,325	117

The total indebtedness of the companies in the Social work activities without accommodation industry was BGN 13,058,000 versus BGN 11,367,000 a year ago. In 2016 the industry's indebtedness totalled BGN 10,426,000.

**INDUSTRY'S INDEBTEDNESS BY SECTORS (BGN)**

SECTOR	2018	2017	2016
OTHER SOCIAL WORK ACTIVITIES WITHOUT ACCOMMODATION N.E.C.	6,176,000	5,119,000	5,818,000
SOCIAL WORK ACTIVITIES WITHOUT ACCOMMODATION FOR THE ELDERLY AND DISABLED	3,749,000	3,305,000	2,403,000
CHILD DAY-CARE ACTIVITIES	3,133,000	2,943,000	2,205,000

Debt-to-assets ratio of the companies in the industry is 0.48 in 2018. It was 0.41 in 2017 and 0.39 in 2016.

According to market experts, the greatest impact on the development of the Social work activities without accommodation industry has net sales revenue from services. In 2018 it stood at BGN 52,714,000, according to the financial statements of the companies in the industry. In 2017 the figure was BGN 48,161,000 and BGN 45,283,000 in 2016.

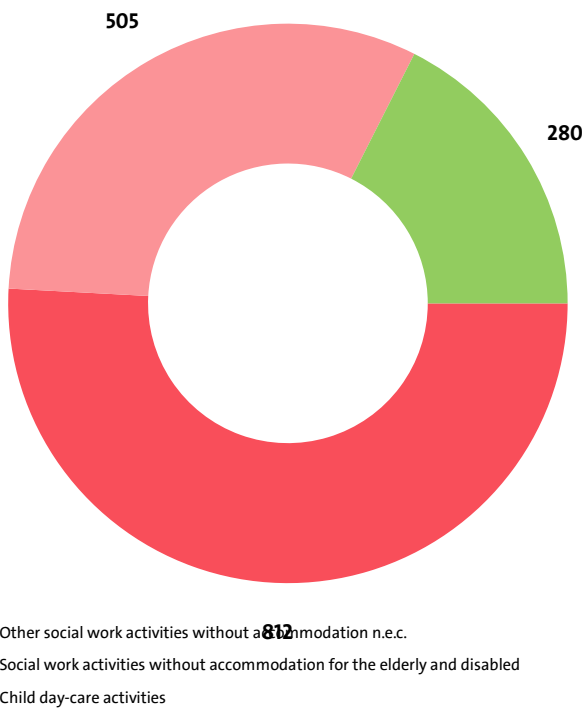
## VI. EMPLOYMENT

A total of 1,597 people were employed in the Social work activities without accommodation sector at the end of 2018, compared to 1,538 in 2017 and 1,375 in 2016.

### NUMBER OF EMPLOYEES BY INDUSTRY SECTORS

SECTOR	NUMBER	SHARE OF INDUSTRY TOTAL
OTHER SOCIAL WORK ACTIVITIES WITHOUT ACCOMMODATION N.E.C.	812	50.85%
SOCIAL WORK ACTIVITIES WITHOUT ACCOMMODATION FOR THE ELDERLY AND DISABLED	505	31.62%
CHILD DAY-CARE ACTIVITIES	280	17.53%

ALLOCATION OF EMPLOYEES BY INDUSTRY'S SECTORS



The analysis on companies' sizes by the number of employees, shows that 182 firms have less than 50 employees\*, 6 have between 50 and 250 employees\*.

\* Companies without data in the number of employees at end of the year are not taken into consideration.

The employees of the leading 10 companies when it comes to numbers make up 38.32% of the workforce in the industry in 2018.

### TOP 10 FIRMS BY SHARE IN INDUSTRY'S TOTAL NUMBER OF EMPLOYEES

RANK	COMPANY	NUMBER OF EMPLOYEES	SHARE
1	PROFIASSIST 24 7 EOOD	124	7.76%
2	MLADEZHKO RAZVITIE I ZAKRILA EOOD	79	4.95%
3	PFLEGE CONNECT EOOD	60	3.76%
4	MOMTRADE RUSE OOD	60	3.76%
5	ASISTENT-24 EOOD	59	3.69%

6	BSB-24 OOD	52	3.26%
7	PCAS OOD	49	3.07%
8	WONDER VALLEY OOD	44	2.76%
9	ARBEITSVERMITTLUNG EU PERSONAL SOFIA GMBH EOOD	44	2.76%
10	LIDER STAR EOOD	41	2.57%

The Social work activities without accommodation industry is the 72nd largest employer in the country with 1,597 employees with the largest employer being Retail trade, except of motor vehicles and motorcycles with 222,070 and Extraction of crude petroleum and natural gas at the bottom with 28 employees.

The Social work activities without accommodation's share in the country's total employment was 0.07% in 2018, 0.08% in 2017 and 0.07% in 2016.

We expect, based on the trend in the last three years, the number of employees of the Social work activities without accommodation industry to change at a compound annual growth rate (CAGR) of 7.77% in 2019.

# The industry is represented by the following companies

INSTITUT PO SOTSIALNI DEYNOSTI I PRAKTIKI EOOD  
 RIKHS EOOD  
 KV KIDS EOOD  
 RAYANA 2000 OOD  
 TERAPEVTICHEN CENTAR SVETULKA 1 EOOD  
 DISCOVERY BV EOOD  
 CHASTNA DETSKA GRADINA PRIATELSKA KASHTA EOOD  
 VELEVI OOD  
 BULTEKS EOOD  
 WONDER VALLEY OOD  
 STEKAR I SIN EOOD  
 BELVIDA EOOD  
 LAZUR\_RR EOOD  
 IN PARTNARS EOOD  
 BULGARIEN PFLEGE 24 EOOD  
 KIARA - A - R - V EOOD  
 DOMASHEN POMOSHNIK 2018 EOOD  
 IN 3 STEPSLTD EOOD  
 ZOVV EOOD  
 AVICENA - D EOOD  
 KIDS HOUSE OOD  
 CHASTNA DETSKA GRADINA ESPA EOOD  
 PLAM MEDIKAL EOOD  
 DVUTSVETNO OOD  
 EURO PERSONAL SERVICE 3 EOOD  
 ANN-MARY 2010 EOOD  
 CHASTNA DETSKA GRADINA D R PETAR BERON EOOD  
 LYUBOZNAJKO 2017 EOOD  
 TSENTAR ZA RAZVITIE SAMOZNAJ EOOD  
 ARBEITSVERMITTLUNG EU PERSONAL SOFIA GMBH EOOD  
 SOINSOFIYA OOD  
 NEUE CHANCE EOOD  
 EURO PERSONAL SERVICE 2 EOOD  
 MIROTVORETZ EOOD  
 AVS DETSKI TSENTAR OOD  
 TSVETNA GRADINA MONTESSORI EOOD  
 DIPA-57 EOOD  
 ASISTENT-24 EOOD  
 TERION - OM OOD  
 DETSKI TSENTAR ROBO EOOD  
 MEDATIO EOOD  
 CHASTNA DETSKA GRADINA SLAVEYCHE EOOD  
 HELPJULIYA EOOD  
 RILSKI IZGREV EOOD  
 AKADEMIYA ZA INTELIGENTNOSTI OOD  
 POLDER EOOD  
 ORTHONIKO D-R NIKOLAY DIMITROV INDIVIDUAL PRACTICES FOR SPECIALISED MEDICAL SERVICE IN ORTHOPAED EOOD  
 SHTASTLIVETS 2017 EOOD  
 DOBRA SVETLINA EOOD  
 PFLEGE CONNECT EOOD  
 SFERA - TSENTAR ZA PSIHOTERAPIYA OOD  
 ET INA-93 - ILINA TACHEVA  
 DALGOTO CHORAPCHE EOOD  
 VITA AB EOOD  
 AVIDA-HOSP EOOD

KEYT TERAPI EOOD  
 KALIVA-VP EOOD  
 BELMONDO BULGARIA EOOD  
 PROFIASSIST 24 7 EOOD  
 VIKSI 99 EOOD  
 PSICHOTERA EOOD  
 SOLIDARNOST I GRIZHA OOD  
 EMAD OOD  
 PROFECTUS EOOD  
 DARDIMAN EOOD  
 KONSTANT - 7 OOD  
 M58 EOOD  
 VASILYOK EOOD  
 PERSONAL KORREKT- DE EOOD  
 STUDIO ZA PSIHOSOTSIALNA PODKREPA-SELENA EOOD  
 ALTENPFLEGE EOOD  
 ADI ADRIANA METODIEVA ET  
 FERAX EOOD  
 DETSKA KUSHTA MONTESORI KRIS EOOD  
 RENATO GROUP OOD  
 KRISTANITA 3 EOOD  
 OTVORENI VRATI EOOD  
 1 - COMPEX HOME PATRONAGE EOOD  
 PEOPLE CARE OOD  
 VALEN MONTESSORI EOOD  
 VIES TREYD OOD  
 NARNI-TDS EOOD  
 TRETA BABA OOD  
 KLUB SLANCHOGLEDI DZZD  
 ET AUDIO-NATURA SENS-ORFEY - GEORGI NYAGOLOV  
 LOGOS - EA EOOD  
 MAYEVTIKA EOOD  
 ET STEKSIM - STEFAN KALVACHEV  
 KIDS PLEY EOOD  
 SUNNY FALL EOOD  
 KINDER GARTEN EOOD  
 MONTESSORI EDU EOOD  
 MOMTRADE RUSE 2 EOOD  
 KOLICHKA BG EOOD  
 IVA-LM EOOD  
 DIRA M EOOD  
 MAMINATA KASHTA 2 EOOD  
 ANGLIYSKA DETSKA KASHTA EOOD  
 LEBENTA EOOD  
 MEDIK KONSULT OOD  
 M & L HOUSE EOOD  
 TONISITA EOOD  
 PACHKOV GROUP EOOD  
 TARA 54 EOOD  
 MEDIKOM SOTSIAL PLYUS EOOD  
 TEITA EOOD  
 MONTANIA EOOD  
 SENTRI EOOD  
 ET LYUBOMIRA - LOZA MILUSHEVA  
 INSTITUT HIRON EOOD  
 DZHI EL DZHI PREMIUM EOOD  
 MARIETA LM EOOD  
 KRISTANITA 1 EOOD

EDIN-E-NIE  
 ET MONTEROSI - ROSITSA KUNEVA  
 VELI LILIA MARKOVA ET  
 DETSKA MECHTA EOOD  
 ORTO BUL MED EOOD  
 HIGIYA-24 EOOD  
 LICHNOSTEN INSTITUT OOD  
 ESKULAP 2009 OOD  
 FIZIS EOOD  
 MOLENBURG EOOD  
 PARVI KRACHKI EOOD  
 PRIM 1000 EOOD  
 MAKSIFAN OOD  
 LOLIPOP - 86 EOOD  
 EKO PRIME EOOD  
 KINILEND EOOD  
 SMART KIDS D EOOD  
 PRIMI 2009 EOOD  
 IGRALNITSA ZANIMALNITSA OOD  
 KABADAIEVA KONSULT EOOD  
 DANI - IV KOREKT EOOD  
 PRIVATE KINDER GARDEN BULGARANCHE EOOD  
 CHASTNA DETSKA GRADINA GALABCHE EOOD  
 NELINO EOOD  
 ZHABCHO OOD  
 PRIVATE MONTESSORI KINDERGARTEN OTKRIVATEL OOD  
 SENEKS EOOD  
 LACHEZAR DANKOV ET  
 KIDS-PM EOOD  
 DOMUS AUXILIUM EOOD  
 DETSKI TSENTAR ZDRAVETS EOOD  
 KINDER OASE OOD  
 MECHO PUH OOD  
 ASTERA 75 EOOD  
 MERY LEND MG EOOD  
 MILENA 60 EOOD  
 VULKAN-2009 EOOD  
 HILFE UND SAUBERKEIT EOOD  
 ANALYSING MINDS EOOD  
 POLYKAI EOOD  
 LOTSMEDA EOOD  
 ANNUNCIATION HEALTHCARE AHF OOD  
 ET IVAN MITSOV-SIG-TS - GANA GEORGIEVA  
 DESI M 2016 EOOD  
 ZVEZDEN VODOPAD 2 OOD  
 REYA CARE EOOD  
 E M DE KONSULT EOOD  
 OMAVA 9 OOD  
 VANIA DELIBASHEVA EOOD  
 ATTITUDE-PSYCHOLOGICAL CONSULTANCY CENTRE EOOD  
 CASITA PARK EOOD  
 DARIA BG EOOD  
 SLANCHEVI DETSA EOOD  
 CHASTNA DETSKA GRADINA KOKO I TCHOKO EOOD  
 ET NADEZHDA KIROVA  
 LAVATO 2016 EOOD  
 KARIN DOM EOOD

KVADRIVIA EOOD  
 ET ZDRAVETS-53 KT - KRASIMIR TODOROV  
 ANELIA RUMYANA DZZD  
 PIA MATER OOD  
 DOMASHNI GRIGI EOOD  
 BUHALCHETA OOD  
 SOTSIALNI NORMI EOOD  
 KIGA EOOD  
 ELLY & GERRY EOOD  
 ADELI PERSONAL CONSULT EOOD  
 SK 07 EOOD  
 BETREUER OOD  
 PENTABAIT EOOD  
 PSIHEO EOOD  
 PACHALOV EOOD  
 HEPI AYS EOOD  
 DETSKI TSENTAR DIANA EOOD  
 VVK GRUP 17 EOOD  
 BRIEHT ACADSMY EOOD  
 AGN - CONSULT EOOD  
 NEO VITA STM OOD  
 WONDER NANNY EOOD  
 HOSPIS - DOVERIE EOOD  
 HIPOKRAT - KT OOD  
 LAVATO EOOD  
 HESTIYA - 2016 EOOD  
 CHASTNA DETSKA GRADINA TATKOVA GRADINA EOOD  
 DETSKO RAZVITIE EOOD  
 SOTSIALNO PREDPRIYATIE POMOSH EOOD  
 SPSIIK OOD  
 YANIKA 2008 EOOD  
 DETSKI CENTAR - VALSHEBNIK EOOD  
 HAND 2 HAND EOOD  
 TALASI EOOD  
 PALIKAROVA EOOD  
 CHASTNA DETSKA GRADINA ANIKA OOD  
 NEUE CHANCE 2015 EOOD  
 BARIS-IRIS EOOD  
 VAYLET 17 EOOD  
 TERAKOM EOOD  
 PPZ EOOD  
 CENTER FOR MATURARION AND GROWTH-AT HOME OOD  
 PLANETA DETSTVO EOOD  
 DRAGOMAN MEDIKAL OOD  
 DIMITRINA MLADZHOVSKA ET  
 BV - MT EOOD  
 MEDICOM - SOCIAL OOD  
 VALONIA EOOD  
 IRINA BOIKINOVA - HVARCHILO EOOD  
 KINDERHAUS EOOD  
 DUNDOR EOOD  
 VITA TRADE 88 EOOD  
 LUKS PROPARTI 1 EOOD  
 GALINA PURCHEVA BISET EOOD  
 SHARENATA KASHTA EOOD  
 LORINA 5 EOOD  
 MLADZHZHKA POMOSH SHUMEN EOOD

ANTO-AN BG EOOD	MALKATA FEYA EOOD
BG GRIJA EOOD	SI - GRUP 7 EOOD
SOTSIALEN FOND MAY - 2000 AD	DORADO 121 OOD
IVA LM IVANKA PAMPULOVA ET	FIZIOTSENTAR OOD
LIFE WITH NO PAIN EOOD	SELANA EOOD
BULTRA EOOD	ANIMA - KOUCH EOOD
PASTRI MECHTI EOOD	KADJI EOOD
HIGIYA-TSANKOV EOOD	MEDIA LINKS OOD
INFOCAST SYSTEMS EOOD	ELERIN 2000 EOOD
SILEKS SV EOOD	TSENTAR ZA SOTSIALNI DEYNOSTI ANGELOVI EOOD
MUTI 97 EOOD	PALECHKO I MALECHKA EOOD
MALAK GRADSKI PSIHOLOGICHESKI TSENTAR EOOD	CHILD CARE AND DEVELOPMENT CENTER NEXT GENERATION EOOD
SLANTSE 2008 EOOD	SIDHARTA 2014 EOOD
KALIOPA 9 OOD	PAPILON EOOD
OBSHTESTVORCI OOD	MOMTRADE RUSE OOD
DZZD DA PAZEL	SOTSIALNO VKLYUCHVANE 2020 EOOD
ZLATITSA MARKOVA HARITOVA	B - BETREUER OOD
ALTENPFLEGE - ELI PALAKARCHEVA ET	ALEKSANDAR VANKOV-AN EOOD
VYARADEN EOOD	DP SUPORT OOD
GLOBAL KNOWLEDGE EOOD	FUL MIKS EOOD
KOSHERCHE EOOD	BARBORANCHETA EOOD
MARY DAR EOOD	SLAVBO EOOD
SKUBAT EOOD	SHARENO DETSTVO OOD
TLS - SVETI NAUM EOOD	PREVANS EOOD
DARA 13 EOOD	VALINA SKY EOOD
POZITIVNI 365 EOOD	VEDA GRUP EOOD
STASI - CENTAR EOOD	LOGOEXPERT OOD
G PRIM EOOD	ASISTENT-PS EOOD
AUKTSION MENIDZHMANT EOOD	TIM VARNA EOOD
OBRAZOVATELEN TSENTUR MONTESSORI - BOURGAS OOD	VENETA - 3 OOD
DEAF KIDS POWER EOOD	LIDER STAR EOOD
VALMONTE EOOD	MALALA OOD
DOMASHNI GRIZHI DIA BURGAS EOOD	3 DI PLEY OOD
LIDEYA YURAP EOOD	ART PRO 20 EOOD
DANIBEL 2014 EOOD	ET ANALITIKA - LENA LALCHEVA
SUPER CHOYS EOOD	DONNA 7 EOOD
ET HRISI 13 - HRISTINA GAYDARSKA	AK 14 EOOD
PCAS OOD	TSKA 93 EOOD
ET TSENTAR ZA PSIHOLOGICHESKA POMOSHT, PSIHOTERAPIYA I SEBEUSAVARSHENSTVANE - ZLATINA MIHAYLOVA	DIVERSITY EOOD
KRISTANITA EOOD	BONI-MES-BOJANKA GEORGIEVA ET
VIKIS M OOD	ZVEZDEN VODOPAD EOOD
ET LEYLA - PETYA KRUMOVA	BSB-24 OOD
GRANDPERANS BULGARIA EOOD	GARU-GARU OOD
PRIVATE KINDERGARTEN GERMANI BG EAD	MLADEZHKO RAZVITIE I ZAKRILA EOOD
NEW ASSISTANS EOOD	SOCIOMED CONSULTING EOOD
IVAN FARTUNOV EOOD	SAFEA EOOD
SONIK START OOD	A.S. - CONSULT EOOD
EGUAURETIEL OOD	ETHOUM MEDIKAL OOD
KRISTANITA 2 EOOD	TSENTAR ZA SPORTNA MEDITSINA SPARTAK EOOD
MILEA 77 EOOD	ARCOIRIS NB EOOD
SHANKOVA STROY KOMERS EOOD	ARIADNE PSI OOD
MONTESSORI - SANDANSKI EOOD	TRUDOVO - LECHEBNO STOPANSTVO EOOD
VIR HELFEN-24 EOOD	VITALIS RUSE AD
PETYA-ZORA OOD	RONTINA 3 EOOD
PRAYM INVIKTUS OOD	DOMA EOOD
BUNKERA TEH EOOD	
TSENTAR ZA SEMEYNO SHTASTIE NYUANSI OOD	
MISIS DAUTFAYAR OOD	
PROFEE 24 STD. GMBH EOOD	
TENIVLA EOOD	
VURDIGES ALTERN EOOD	
KRINI-82 EOOD	
ZVEZDICHKO EOOD	

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