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Industry Report

Activities of households as
employers of domestic
personnel
2016
ROMANIA

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I. KEY INDICATORS

- The Activities of households as employers of domestic personnel industry in Romania was represented by 29 companies at the end of 2016, compared to 22 in the previous year and 21 in 2014.
- The industry's net profit amounted to RON 292,075 in 2016.
- The industry's total revenue was RON 7,320,810 in 2016, up by 9.56% compared to the previous year.
- The combined costs of the companies in the Activities of households as employers of domestic personnel industry reached RON 6,890,811 in 2016, up by 13.69% year-on-year.
- A total of 142 people were employed in the Activities of households as employers of domestic personnel industry in 2016, compared to 102 in 2015 and 98 in 2014.
- Most of the companies in the industry are based in Arad, followed by Sibiu and Bucharest.

II. INTRODUCTION

In 2016 the companies in the Activities of households as employers of domestic personnel industry numbered 29.

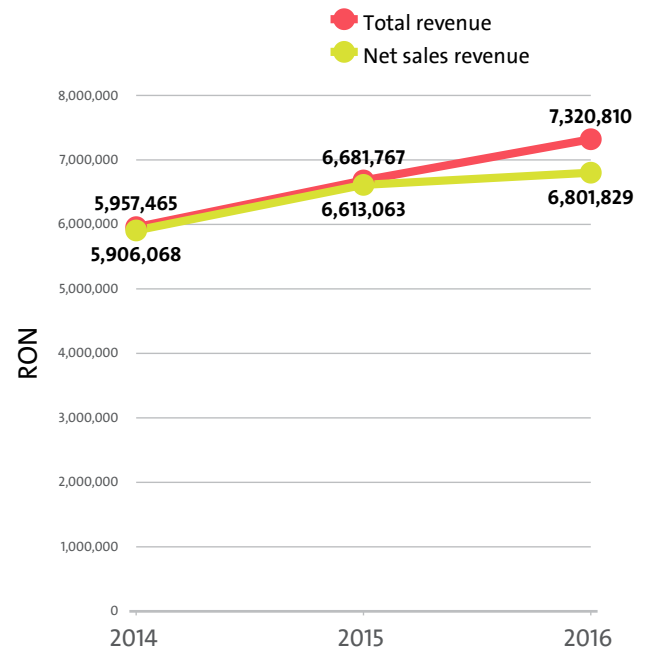
In 2015 there were a total of 22 companies operating in the industry. In 2014 their number totalled 21.

NUMBER OF COMPANIES IN ACTIVITIES OF HOUSEHOLDS AS EMPLOYERS OF DOMESTIC PERSONNEL INDUSTRY BY SECTORS

SECTOR	2016	2015	2014
ACTIVITIES OF HOUSEHOLDS AS EMPLOYERS OF DOMESTIC PERSONNEL	29	22	21

III. REVENUES

The total revenue in the industry was RON 7,320,810 in 2016, RON 6,681,767 in 2015 and 5,957,465 in 2014.



The companies in the Activities of households as employers of domestic personnel market of Romania earned combined net sales revenues of RON 6,801,829 in 2016.

In annual terms, sales marked a growth of 2.85% compared to 2015. In comparison to 2014 they grew by 15.17%. In 2015 sales grew by 11.97% year-on-year.

We expect, based on the trend in the last three years, the total revenue of the Activities of households as employers of domestic personnel industry to change at a compound annual growth rate (CAGR) of 10.85% in 2017.

The top 10 companies in terms of total revenue in Activities of households as employers of domestic personnel accounted for 88.32% of the industry's total in 2016, 99.36% in 2015 and 99.65% in 2014.

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

RANK	COMPANY	TOTAL REVENUE (RON)	NET SALE REVENUE (RON)
1	INTERCARE 24 SRL	2,249,972	2,081,825
2	INTERWORK 24 SRL	966,427	722,097
3	POWER PEOPLE INTERNATIONAL SRL	797,884	791,861
4	PREST LUX SRL	715,773	715,758
5	BOGDY MARJ SRL	463,956	449,835
6	MC MD 2008 SRL	374,134	374,086
7	CRISLI DIENST SRL	256,596	217,103
8	CLEENER-SERVICE SRL	231,776	215,302
9	AURELIA DIENST SRL	216,998	216,424
10	PERSONALDIENST SRL	191,979	190,499

The top 10 by assets in the Activities of households as employers of domestic personnel industry made up RON 3,216,921, or 47.29% of the total net sales revenue.

TOP 10 BY TOTAL ASSETS IN THE INDUSTRY

RANK	COMPANY	RON
1	TOBUTO SERVICE SRL	758,425
2	POWER PEOPLE INTERNATIONAL SRL	708,828
3	PREST LUX SRL	644,791
4	BOGDY MARJ SRL	327,733
5	INTERWORK 24 SRL	274,897
6	FUNERARE BISTRITA SRL	265,188
7	JOHANNA PFLEGE AGENTUR SRL	79,595
8	AURELIA DIENST SRL	63,992
9	PLUS CHARNORIS SRL	45,801
10	SELIC SERVICE SRL	39,272

TOP 10 COMPANIES BY TOTAL REVENUE IN THE INDUSTRY WERE:

COMPANY	RON
INTERCARE 24 SRL	2,249,972
INTERWORK 24 SRL	966,427
POWER PEOPLE INTERNATIONAL SRL	797,884
PREST LUX SRL	715,773
BOGDY MARJ SRL	463,956
MC MD 2008 SRL	374,134
CRISLI DIENST SRL	256,596
CLEENER-SERVICE SRL	231,776
AURELIA DIENST SRL	216,998
PERSONALDIENST SRL	191,979

The 10 largest companies in terms of total revenue in sector Activities of households as employers of domestic personnel earned total revenue of RON 6,465,495 and accounted for 88.32% of the industry's total revenue.

IV. EXPENSES

The combined costs of the companies in the Activities of households as employers of domestic personnel industry reached RON 6,890,811 in 2016.

In annual terms, total expenses went up by 13.69% compared to 2015 and rose by 19.73% in comparison to 2014.

We expect, based on the trend in the last three years, the total costs of the Activities of households as employers of domestic personnel industry to change at a compound annual growth rate (CAGR) of 9.42% in 2017.

Employment expenses in the Activities of households as employers of domestic personnel industry grew by 50.69% over the year to RON 2,364,783 in 2016.

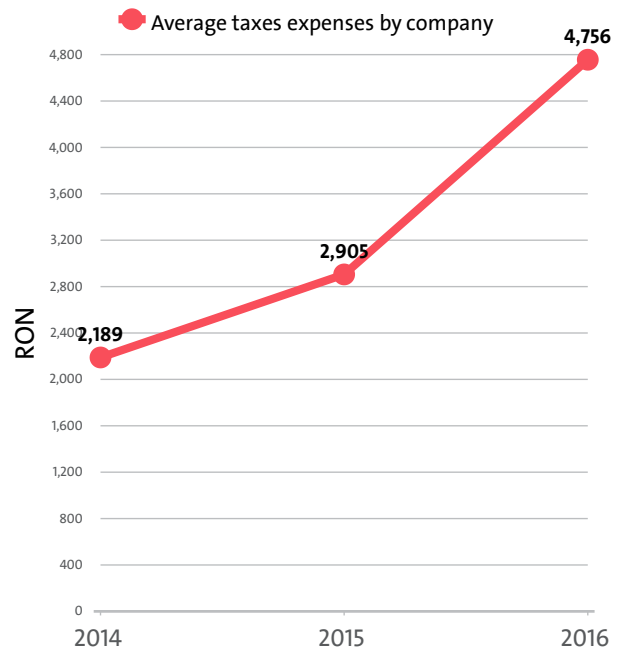
The highest growth in labour costs, of 50.69%, was registered by Activities of households as employers of domestic personnel.

The monthly costs per employee in the Activities of households as employers of domestic personnel industry averaged RON 1,388 in 2016, RON 1,282 in 2015 and RON 1,231 in 2014.

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

RANK	COMPANY	RON
1	INTERWORK 24 SRL	4,064
2	MC MD 2008 SRL	3,883
3	CLEENER-SERVICE SRL	2,481
4	PREST LUX SRL	1,715
5	INTERCARE 24 SRL	1,502
6	POWER PEOPLE INTERNATIONAL SRL	1,479
7	PERSONALDIENST SRL	1,425
8	CRISLI DIENST SRL	1,341
9	BOGDY MARJ SRL	1,258
10	IDEAL STAR SRL	1,201

The industry's tax expenses stood at RON 137,924 in 2016. In 2015 it paid taxes of RON 63,920. In 2014 the industry paid RON 45,975 in taxes.



V. PROFITABILITY

The industry's net profit amounted to RON 292,075 in 2016, compared to a net profit of RON 556,680 in 2015 and a net profit of RON 156,330 in 2014.

TOP 10 COMPANIES BY HIGHEST NET PROFIT IN ACTIVITIES OF HOUSEHOLDS AS EMPLOYERS OF DOMESTIC PERSONNEL

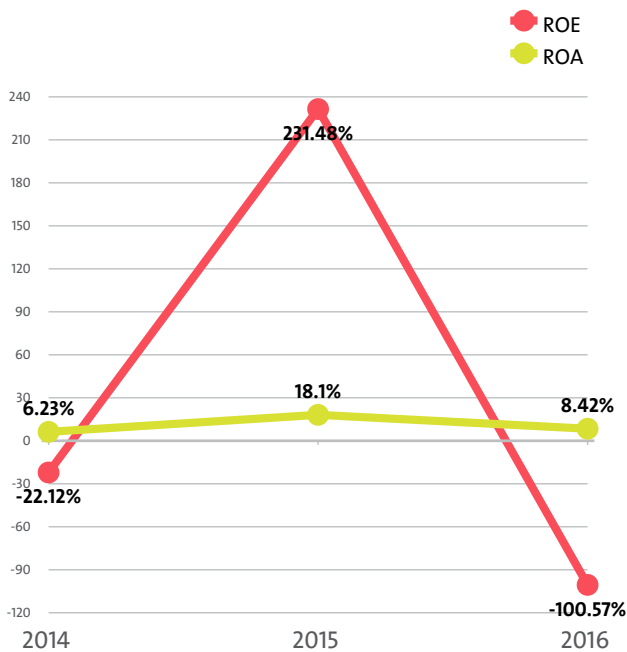
RANK	COMPANY	RON
1	POWER PEOPLE INTERNATIONAL SRL	311,042
2	PREST LUX SRL	159,217
3	JOHANNA PFLEGE AGENTUR SRL	72,541
4	FUNERARE BISTRITA SRL	37,706
5	MC MD 2008 SRL	32,593
6	SELIC SERVICE SRL	27,224
7	INTERWORK 24 SRL	20,591
8	PLUS CHARNORIS SRL	11,754
9	TOBUTO SERVICE SRL	7,933
10	MENAJ SERV SRL	4,308

TOP COMPANIES BY HIGHEST NET LOSS IN ACTIVITIES OF HOUSEHOLDS AS EMPLOYERS OF DOMESTIC PERSONNEL

RANK	COMPANY	RON
1	AURELIA DIENST SRL	121,641
2	JOJODIENST SRL	72,957
3	PERSONALDIENST SRL	68,880
4	NICDIENST SRL	47,627
5	CRISLIBERATEN SRL	38,221

The Activities of households as employers of domestic personnel industry's return on equity (ROE) is -100.57% compared to 231.48% in 2015 and -22.12% in 2014.

The Activities of households as employers of domestic personnel's return on assets (ROA) was 8.42% in 2016, while in 2015 it amounted to 18.10% and 6.23% in 2014.



TOP 10 COMPANIES BY HIGHEST AVERAGE NET PROFIT PER EMPLOYEE IN ACTIVITIES OF HOUSEHOLDS AS EMPLOYERS OF DOMESTIC PERSONNEL

RANK	COMPANY	RON	COMPANY HEADQUARTERS (CITY)
1	JOHANNA PFLEGE AGENTUR SRL	72,541	ARAD
2	POWER PEOPLE INTERNATIONAL SRL	62,208	SIBIU
3	FUNERARE BISTRITA SRL	37,706	BISTRITA-NASAUD
4	SELIC SERVICE SRL	27,224	MARAMURES
5	PREST LUX SRL	9,366	SALAJ
6	MC MD 2008 SRL	5,432	GIURGIU
7	MENAJ SERV SRL	4,308	SUCEAVA
8	INTERWORK 24 SRL	2,288	SIBIU
9	PAMED COMPANY SRL	2,064	CARAS-SEVERIN
10	BOGDY MARJ SRL	71	HUNEDOARA

About 20.00% of the 10 leading companies in terms of net profit per employee are located in Sibiu, while 10.00% are Maramures-based and 10.00% are headquartered in Caras-Severin.

The average net sales revenue per employee in the Activities of households as employers of domestic personnel industry amounted to RON 47,900 in 2016, down by 26.12%

compared to 2015 and down by 20.52% compared to 2014.

The Activities of households as employers of domestic personnel field generated an average RON 51,555 in total revenue per employee. In 2015 and 2014 the figure was RON 65,508 and RON 60,790, respectively.

The average total revenue per company in the Activities of households as employers of domestic personnel industry decreased to RON 252,442 in 2016 from RON 303,717 in 2015. The 2014 value was RON 283,689.

A company in the Activities of households as employers of domestic personnel field made on average a net sales revenue of RON 234,546 in 2016, compared to RON 300,594 in 2015 and RON 281,241 in 2014.

AVERAGE REVENUES PER EMPLOYEE IN ACTIVITIES OF HOUSEHOLDS AS EMPLOYERS OF DOMESTIC PERSONNEL IN 2016

SECTOR	AVERAGE NET SALES REVENUE (RON)	AVERAGE TOTAL REVENUE (RON)	NUMBER OF EMPLOYEES
ACTIVITIES OF HOUSEHOLDS AS EMPLOYERS OF DOMESTIC PERSONNEL	47,900	51,555	142

AVERAGE REVENUE PER COMPANY IN ACTIVITIES OF HOUSEHOLDS AS EMPLOYERS OF DOMESTIC PERSONNEL IN 2016

SECTOR	AVERAGE NET SALES REVENUE (RON)	AVERAGE TOTAL REVENUE (RON)	NUMBER OF COMPANIES
ACTIVITIES OF HOUSEHOLDS AS EMPLOYERS OF DOMESTIC PERSONNEL	234,546	252,442	29

The total indebtedness of the companies in the Activities of households as employers of domestic personnel industry was RON 3,748,666 versus RON 352,383 a year ago. In 2014 the industry's indebtedness totalled RON 3,215,498.

Debt-to-assets ratio of the companies in the industry is 1.08 in 2016. It was 0.11 in 2015 and 1.28 in 2014.

VI. EMPLOYMENT

A total of 142 people were employed in the Activities of households as employers of domestic personnel field at the end of 2016, compared to 102 in 2015 and 98 in 2014.

The analysis on companies' sizes by the number of employees, shows that 19 firms have less than 50 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 88.03% of the workforce in the industry in 2016.

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

RANK	COMPANY	NUMBER OF EMPLOYEES	SHARE
1	INTERCARE 24 SRL	24	16.90%
2	PREST LUX SRL	17	11.97%
3	AURELIA DIENST SRL	17	11.97%
4	NICDIENST SRL	16	11.27%
5	CRISLIBERATEN SRL	14	9.86%
6	BOGDY MARJ SRL	9	6.34%
7	INTERWORK 24 SRL	9	6.34%
8	CRISLI DIENST SRL	7	4.93%
9	PERSONALDIENST SRL	6	4.23%
10	MC MD 2008 SRL	6	4.23%

The Activities of households as employers of domestic personnel industry is the 86th largest employer in the country with 142 employees with the largest employer being Retail trade, except of motor vehicles and motorcycles with 437,697 and Activities of extraterritorial organisations and bodies at the bottom with 1 employees.

We expect, based on the trend in the last three years, the number of employees of the Activities of households as employers of domestic personnel industry to change at a compound annual growth rate (CAGR) of 20.37% in 2017.

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Email us at consulting@seenews.com

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