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Industry Report

Social work activities without
accommodation

2016

ROMANIA

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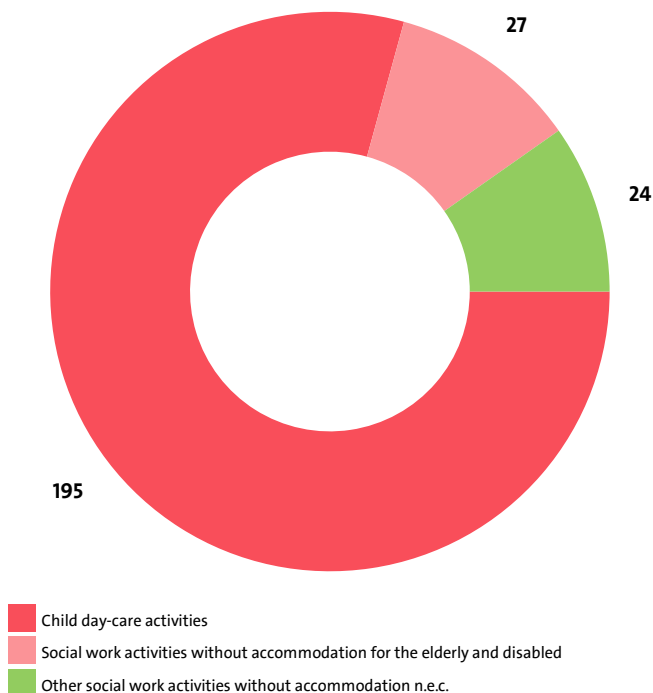
I. KEY INDICATORS

- The Social work activities without accommodation industry in Romania was represented by 246 companies at the end of 2016, compared to 203 in the previous year and 152 in 2014.
- The industry's net loss amounted to RON 1,433,991 in 2016.
- The industry's total revenue was RON 20,953,955 in 2016, down by 8.41% compared to the previous year.
- The combined costs of the companies in the Social work activities without accommodation industry reached RON 22,158,570 in 2016, down by 8.54% year-on-year.
- A total of 638 people were employed in the Social work activities without accommodation industry in 2016, compared to 555 in 2015 and 420 in 2014.
- Most of the companies in the industry are based in Bucharest, followed by Ilfov and Brasov.

II. INTRODUCTION

In 2016 the companies in the Social work activities without accommodation industry numbered 246, distributed in 3 sectors.

INDUSTRY STRUCTURE BY SECTORS AND NUMBER OF COMPANIES



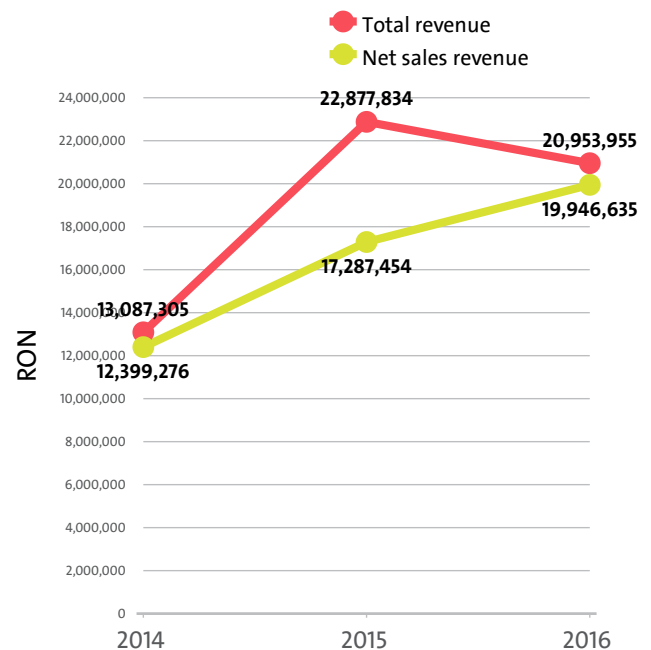
In 2015 there were a total of 203 companies operating in the industry. In 2014 their number totalled 152.

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

SECTOR	2016	2015	2014
CHILD DAY-CARE ACTIVITIES	195	158	121
SOCIAL WORK ACTIVITIES WITHOUT ACCOMMODATION FOR THE ELDERLY AND DISABLED	27	25	14
OTHER SOCIAL WORK ACTIVITIES WITHOUT ACCOMMODATION N.E.C.	24	20	17

III. REVENUES

The total revenue in the industry was RON 20,953,955 in 2016, RON 22,877,834 in 2015 and 13,087,305 in 2014.



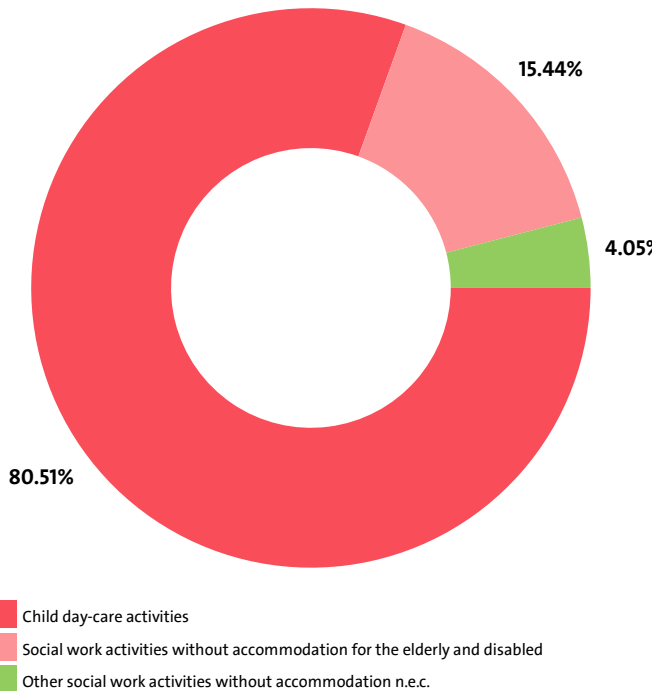
The companies in the Social work activities without accommodation market of Romania earned combined net sales revenues of RON 19,946,635 in 2016.

In annual terms, sales marked an increase of 15.38% compared to 2015. In comparison to 2014 they increased by 60.87%. In 2015 sales grew by 39.42% year-on-year.

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 26.53% in 2017.

Child day-care activities contributed net sales revenue of RON 16,059,289 or 80.51% of the total net sales in the industry, sector Social work activities without accommodation for the elderly and disabled - RON 3,079,735 (15.44%), and sector Other social work activities without accommodation n.e.c. - RON 807,611 (4.05%).

INDUSTRY'S NET SALES REVENUE STRUCTURE BY SECTORS



The highest growth, of 60.85%, 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 52.73%.

TOP COMPANIES' REVENUE BY SECTORS

SEGMENT	COMPANY	TOTAL REVENUE (RON)	NET SALES REVENUE (RON)
OTHER SOCIAL WORK ACTIVITIES WITHOUT ACCOMMODATION N.E.C.			
	ASSET ELLAAL SRL	439,618	0
	ALTIX VISION SRL	248,398	241,055
	ICN TREE SRL	124,890	124,582
CHILD DAY-CARE ACTIVITIES			
	MILENIUM GAZ SRL	1,736,329	1,736,329
	M SERVICE CENTER THERAPY SRL	452,442	452,442
	ROXY BABY SRL	364,999	364,999
SOCIAL WORK ACTIVITIES WITHOUT ACCOMMODATION FOR THE ELDERLY AND DISABLED			
	AR EVOLUTION JOBS SRL	1,023,459	1,008,097
	BASIC CARE SRL	387,338	387,338
	FIZIOLIFE CARE SRL	373,140	373,140

The top 10 companies in terms of total revenue in Social work activities without accommodation accounted for 27.69% of the industry's total in 2016, 36.24% in 2015 and 55.20% in 2014.

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

RANK	COMPANY	TOTAL REVENUE (RON)	NET SALE REVENUE (RON)
1	MILENIUM GAZ SRL	1,736,329	1,736,329
2	AR EVOLUTION JOBS SRL	1,023,459	1,008,097
3	M SERVICE CENTER THERAPY SRL	452,442	452,442
4	ASSET ELLAAL SRL	439,618	0
5	BASIC CARE SRL	387,338	387,338

6	FIZIOLIFE CARE SRL	373,140	373,140
7	ROXY BABY SRL	364,999	364,999
8	BETTY-MAR HOUSE SRL	364,457	364,456
9	SWEET LITTLE BABY SRL	338,286	338,286
10	BURSUCEII VESELI SRL	321,187	297,509

The top 10 by assets in the Social work activities without accommodation industry made up RON 3,032,229, or 15.20% of the total net sales revenue.

TOP 10 BY TOTAL ASSETS IN THE INDUSTRY

RANK	COMPANY	RON
1	ASSET ELLAAL SRL	8,878,407
2	STEFANELEN SRL	2,308,991
3	MILENIUM GAZ SRL	1,388,607
4	BURSUCEII VESELI SRL	869,465
5	DANDU INVEST SRL	755,166
6	PYGMALION AGENCY SRL-D	471,543
7	LITTLE DIAMONDS - ALEX & FRIENDS SRL	452,161
8	ALTIX VISION SRL	417,843
9	DEMO ENTERTAINMENT CLUB SRL	314,784
10	SOCIAL ASSISTANCE CONSULTING SRL	280,315

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

COMPANY	RON
ASSET ELLAAL SRL	439,618
ALTIX VISION SRL	248,398
ICN TREE SRL	124,890
AGENTIA AGE LINE SRL	122,400
UNITATE DE CONSILIERE OCUPARE SI FORMARE PROFESIONALA SRL	89,677
SERVFORMSTAR SRL	78,113
AME COMPLEX SRL	65,095
DAA FOTBAL SRL	60,129
PEOPLE SOLUTIONS CONSULTING SRL	56,992
L&B SRL	28,505

The 10 largest companies in terms of total revenue in sector Social work activities without accommodation earned total revenue of RON 1,313,817 and accounted for 6.27% of the industry's total revenue.

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

COMPANY	RON
MILENIUM GAZ SRL	1,736,329
M SERVICE CENTER THERAPY SRL	452,442
ROXY BABY SRL	364,999
BETTY-MAR HOUSE SRL	364,457
SWEET LITTLE BABY SRL	338,286
BURSUCEII VESELI SRL	321,187
LITTLE DIAMONDS - ALEX & FRIENDS SRL	301,073
PYGMALION AGENCY SRL-D	246,395
ACTIVE EDUCATION CENTER SRL	233,986
AFTER ART SRL	231,547

The 10 largest companies in terms of total revenue in sector Social work activities without accommodation earned total revenue of RON 4,590,701 and accounted for 21.91% of the industry's total revenue.

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

COMPANY	RON
AR EVOLUTION JOBS SRL	1,023,459
BASIC CARE SRL	387,338
FIZIOLIFE CARE SRL	373,140
COMUNITAS HELP SRL	258,640
MONALISA HEALT S.R.L.	244,585
24H-PFLEGEBLUEENGELS SRL	183,712
BLUEENGELSPFLEGE ZUHAUSE SRL	177,321
CENTRUL DIANDRA SRL	146,630
BETREUUNG MIT HERZ SRL	94,147
SES BATRANETI LINISTITE SRL	82,050

The 10 largest companies in terms of total revenue in sector Social work activities without accommodation earned total revenue of RON 2,971,022 and accounted for 14.18% of the industry's total revenue.

IV. EXPENSES

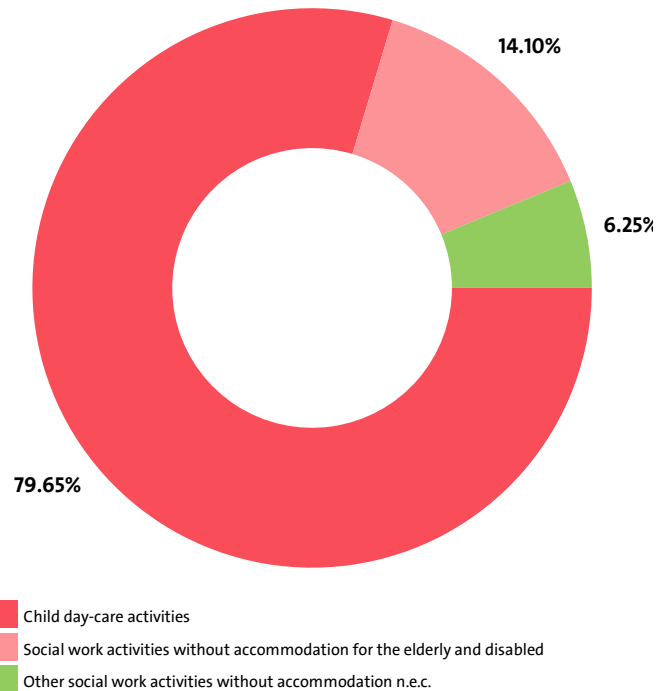
The combined costs of the companies in the Social work activities without accommodation industry reached RON 22,158,570 in 2016.

In annual terms, total expenses decreased by 8.54% compared to 2015 and rose by 50.87% in comparison to 2014.

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 22.83% in 2017.

Child day-care activities reported the highest total costs, of RON 17,649,897, followed by Social work activities without accommodation for the elderly and disabled with RON 3,123,761 and Other social work activities without accommodation n.e.c. with total costs of RON 1,384,912.

INDUSTRY'S TOTAL COSTS STRUCTURE BY SECTORS



Child day-care activities marked the highest annual growth in total expenses, of 6.81%, while total expenses went down the most, by 47.42%, for Social work activities without accommodation for the elderly and disabled.

The biggest spenders in the industry, with costs of over 10% of industry's costs, numbered 41, including ROXY BABY SRL, LE JARDIN DES ENFANTS SRL, KIDBIZ CONCEPT SRL, R & R GENIUS LAB SRL, VERBA MATER SRL. The medium spenders, or those in the 5% and 10% range count 44 and include BLUEENGELSPFLEGE ZUHAUSE SRL, CENTRULPASCAL SRL-D, ARISTOCRAT KIDS CLUB SRL, PEOPLE T@GETHER S.R.L., KEIKO BUSINESS GROUP SRL. Below 5% threshold are 161 companies, including EDU-CATS SRL, A&M ASIST SERVICE RESOURCE SRL, GUARDERIA SOL & MAR SRL, SC AGENCY PETRIANA SRL, MONALISA HEALT S.R.L..

Employment expenses in the Social work activities without accommodation industry grew by 12.51% on the year to RON 8,810,452 in 2016.

The highest growth in labour costs, of 21.05%, was registered by Child day-care activities, while Other social work activities without accommodation n.e.c. marked the sharpest fall, of 71.87%.

The monthly costs per employee in the Social work activities without accommodation industry averaged RON 1,151 in 2016, RON 1,176 in 2015 and RON 974 in 2014.

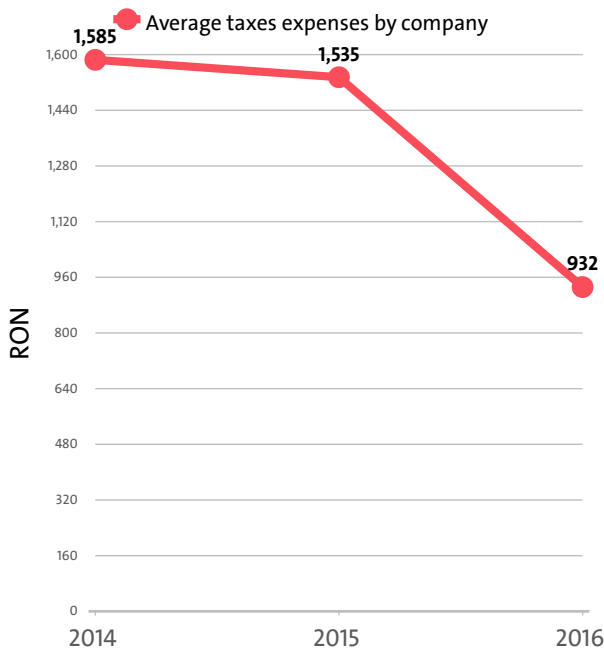
EMPLOYMENT EXPENSES IN SOCIAL WORK ACTIVITIES WITHOUT ACCOMMODATION BY SECTORS IN 2016

RANK	SECTOR	EMPLOYMENT EXPENSES (RON)	AVERAGE EXPENSES PER EMPLOYEE (RON)
1	CHILD DAY-CARE ACTIVITIES	6,603,359	13,728
2	SOCIAL WORK ACTIVITIES WITHOUT ACCOMMODATION FOR THE ELDERLY AND DISABLED	2,061,738	14,519
3	OTHER SOCIAL WORK ACTIVITIES WITHOUT ACCOMMODATION N.E.C.	145,355	9,690

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

RANK	COMPANY	RON
1	SES BATRANETI LINISTITE SRL	6,107
2	IRIS MEDICAL CARE SRL	3,616
3	ALTIX VISION SRL	3,602
4	BURSUCEII VESELI SRL	2,992
5	COMUNITAS HELP SRL	2,821
6	PRICHINDEL HAPPY FACES SES SRL	2,817
7	STUDY AND PLAY ZONE SRL-D	2,603
8	LITTLE DIAMONDS - ALEX & FRIENDS SRL	2,311
9	RALCOM PROD SRL	2,281
10	RISTEA TOTAL GROUP SRL	2,212

The industry's tax expenses stood at RON 229,376 in 2016. In 2015 it paid taxes of RON 311,680. In 2014 the industry paid RON 240,975 in taxes.



EXPENSES ON TAXES BY SECTORS

RANK	SECTOR	RON	Y/Y CHANGE
1	CHILD DAY-CARE ACTIVITIES	184,936	-31.65%
2	SOCIAL WORK ACTIVITIES WITHOUT ACCOMMODATION FOR THE ELDERLY AND DISABLED	29,443	18.12%
3	OTHER SOCIAL WORK ACTIVITIES WITHOUT ACCOMMODATION N.E.C.	14,997	-7.24%

V. PROFITABILITY

The industry's net loss amounted to RON 1,433,991 in 2016, compared to a net loss of RON 1,662,525 in 2015 and a net loss of RON 1,840,728 in 2014.

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

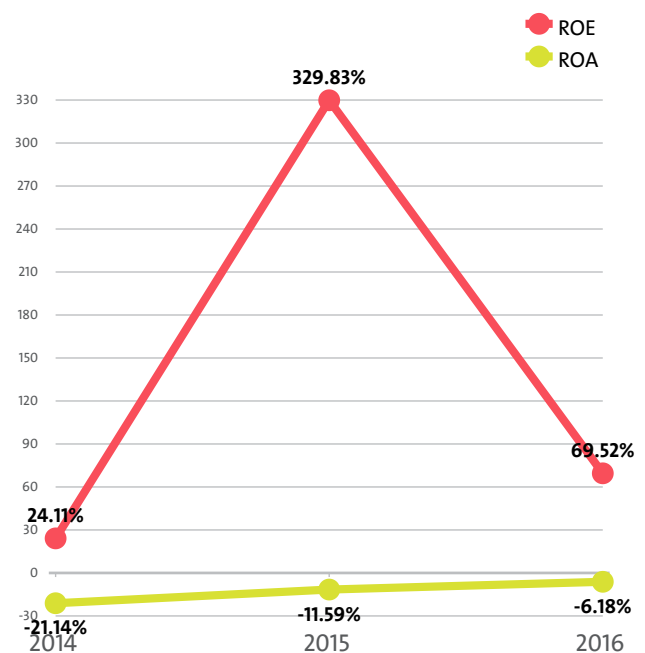
RANK	COMPANY	RON
1	FIZIOLIFE CARE SRL	199,404
2	ALCOVIX BUSINESS SRL-D	191,254
3	MONALISA HEALT S.R.L.	177,174
4	M SERVICE CENTER TERAPEY SRL	173,515
5	ROXY BABY SRL	171,089
6	PYGMALION AGENCY SRL-D	151,743
7	BETTY-MAR HOUSE SRL	116,935
8	AGENTIA AGE LINE SRL	113,331
9	ICN TREE SRL	91,464
10	BURSUCEII VESELI SRL	81,737

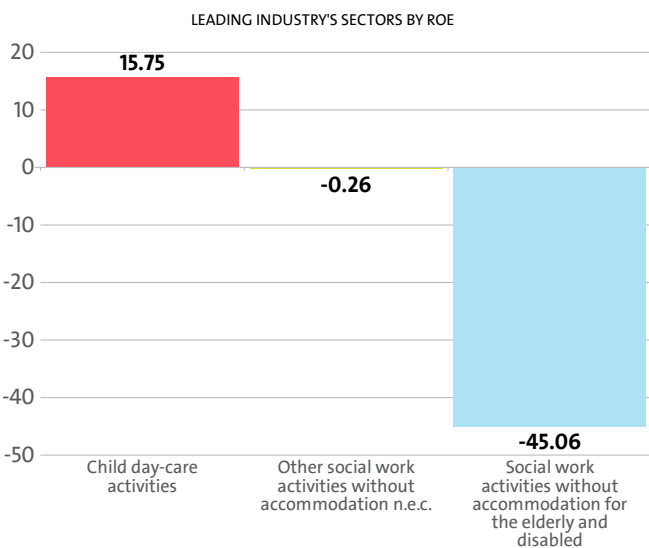
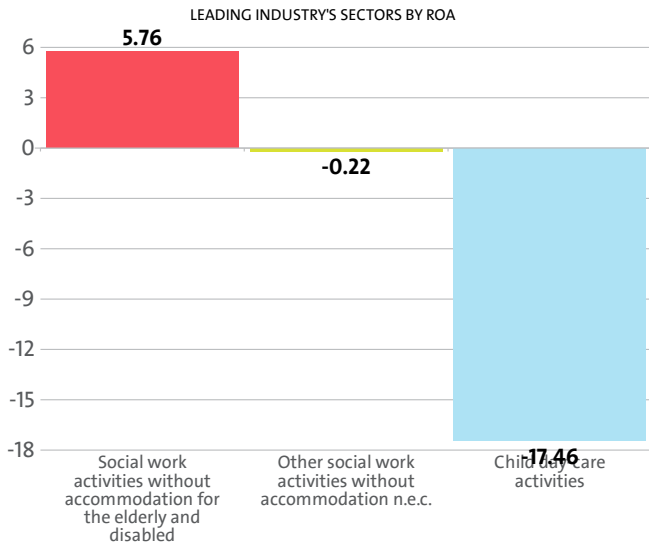
TOP COMPANIES BY HIGHEST NET LOSS IN SOCIAL WORK ACTIVITIES WITHOUT ACCOMMODATION

RANK	COMPANY	RON
1	PLOIESTIUL IN CULORI SRL	192,273
2	KIDS' JOY LAND SRL	169,198
3	ASSET ELLAAL SRL	169,072
4	SWEET LITTLE BABY SRL	157,651
5	MINICLUB GRADINITA CAPSUNIK SRL	136,501

The Social work activities without accommodation industry's return on equity (ROE) is 69.52% compared to 329.83% in 2015 and 24.11% in 2014.

The Social work activities without accommodation's return on assets (ROA) was -6.18%, while in 2015 it amounted to -11.59% and -21.14% in 2014.





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

RANK	COMPANY	RON	COMPANY HEADQUARTERS (CITY)
1	ICN TREE SRL	91,464	BUCHAREST
2	PYGMALION AGENCY SRL-D	50,581	TIMIS
3	MONALISA HEALT S.R.L.	44,294	HUNEDOARA
4	BURSUCEII VESELI SRL	40,869	BUCHAREST
5	BETTY-MAR HOUSE SRL	38,978	BUCHAREST
6	M SERVICE CENTER THERAPY SRL	34,703	BUCHAREST
7	LITTLE BEARS SRL	27,465	BUCHAREST
8	MORITZ CLUB SRL	26,901	BUCHAREST
9	MICILE GENII AFTERSCHOOL SRL-D	23,633	GORJ
10	CLUBUL STELUTELOR VESELE SRL	23,223	DAMBOVITA

About 60.00% of the 10 leading companies in terms of net profit per employee are located in Bucharest, while 10.00% are Hunedoara-based and 10.00% are headquartered in Gorj.

The average net sales revenue per employee in the Social work activities without accommodation industry amounted to RON 31,264 in 2016, up by 0.37% compared to 2015 and up by 5.90% compared to 2014.

The Social work activities without accommodation industry generated an average RON 32,843 in total revenue per employee. In 2015 and 2014 the figure was RON 41,221 and RON 31,160, respectively.

The average total revenue per company in the Social work activities without accommodation industry dropped to RON 85,179 in 2016 from RON 112,699 in 2015. The 2014 value was RON 86,101.

A company in the Social work activities without accommodation market made on average a net sales revenue of RON 81,084 in 2016, compared to RON 85,160 in 2015 and RON 81,574 in 2014.

AVERAGE REVENUES PER EMPLOYEE IN SOCIAL WORK ACTIVITIES WITHOUT ACCOMMODATION IN 2016

SECTOR	AVERAGE NET SALES REVENUE (RON)	AVERAGE TOTAL REVENUE (RON)	NUMBER OF EMPLOYEES
OTHER SOCIAL WORK ACTIVITIES WITHOUT ACCOMMODATION N.E.C.	53,841	91,824	15
CHILD DAY-CARE ACTIVITIES	33,387	33,694	481
SOCIAL WORK ACTIVITIES WITHOUT ACCOMMODATION FOR THE ELDERLY AND DISABLED	21,688	23,732	142

AVERAGE REVENUE PER COMPANY IN SOCIAL WORK ACTIVITIES WITHOUT ACCOMMODATION IN 2016

SECTOR	AVERAGE NET SALES REVENUE (RON)	AVERAGE TOTAL REVENUE (RON)	NUMBER OF COMPANIES
SOCIAL WORK ACTIVITIES WITHOUT ACCOMMODATION FOR THE ELDERLY AND DISABLED	114,064	124,812	27
CHILD DAY-CARE ACTIVITIES	82,355	83,111	195
OTHER SOCIAL WORK ACTIVITIES WITHOUT ACCOMMODATION N.E.C.	33,650	57,390	24

The total indebtedness of the companies in the Social work activities without accommodation industry was RON 23,757,145 versus RON 1,006,988 a year ago. In 2014 the industry's indebtedness totalled RON 14,686,516.

INDUSTRY'S INDEBTEDNESS BY SECTORS (RON)

SECTOR	2016	2015	2014
CHILD DAY-CARE ACTIVITIES	18,215,360	601,362	12,749,754
SOCIAL WORK ACTIVITIES WITHOUT ACCOMMODATION FOR THE ELDERLY AND DISABLED	4,175,825	394,333	601,351
OTHER SOCIAL WORK ACTIVITIES WITHOUT ACCOMMODATION N.E.C.	1,365,960	11,293	1,335,411

Debt-to-assets ratio of the companies in the industry is 1.02 in 2016. It was 0.07 in 2015 and 1.69 in 2014.

VI. EMPLOYMENT

A total of 638 people were employed in the Social work activities without accommodation industry at the end of 2016,

compared to 555 in 2015 and 420 in 2014.

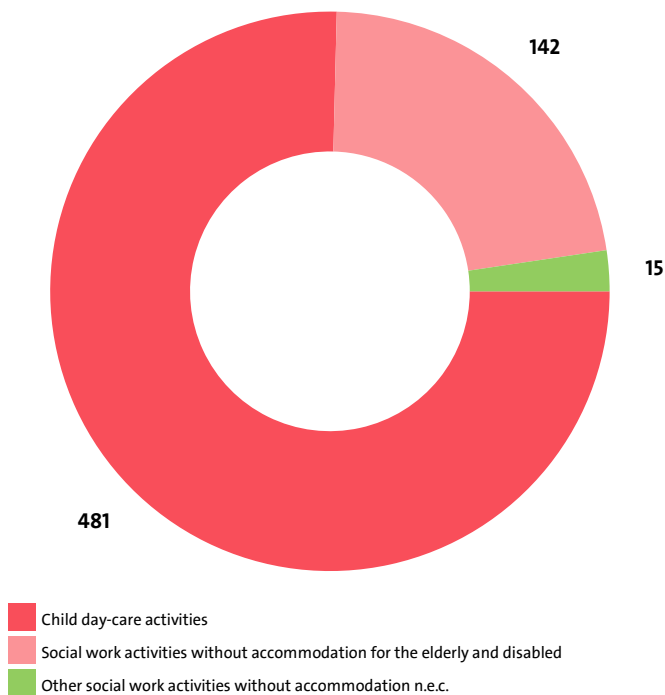
NUMBER OF EMPLOYEES BY INDUSTRY SECTORS

SECTOR	NUMBER	SHARE OF INDUSTRY TOTAL
CHILD DAY-CARE ACTIVITIES	481	75.39%
SOCIAL WORK ACTIVITIES WITHOUT ACCOMMODATION FOR THE ELDERLY AND DISABLED	142	22.26%
OTHER SOCIAL WORK ACTIVITIES WITHOUT ACCOMMODATION N.E.C.	15	2.35%

the 82nd largest employer in the country with 638 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 Social work activities without accommodation industry to change at a compound annual growth rate (CAGR) of 23.25% in 2017.

ALLOCATION OF EMPLOYEES BY INDUSTRY'S SECTORS



The analysis on companies' sizes by the number of employees, shows that 160 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 30.41% 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	AR EVOLUTION JOBS SRL	47	7.37%
2	FIRST STEPS KIDS PLACE SRL	22	3.45%
3	MILENIUM GAZ SRL	21	3.29%
4	BASIC CARE SRL	19	2.98%
5	ACTIV CARE SRL	18	2.82%
6	SWEET LITTLE BABY SRL	17	2.66%
7	MINICLUB GRADINITA CAPSUNIK SRL	14	2.19%
8	KIDS' JOY LAND SRL	13	2.04%
9	ACTIVE EDUCATION CENTER SRL	12	1.88%
10	DEMO ENTERTAINMENT CLUB SRL	11	1.72%

The Social work activities without accommodation industry is

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