

# Bulgaria Retail Report Q1 2016

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## Abstracts

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**BMI View:** As demand for skilled workers in Bulgaria outpaces supply, wages will continue to rise over the next five years. With substantial levels of urbanisation and ever improving transport networks locally and internationally Bulgaria has an easily accessible and increasingly affluent consumer target market. However country rewards remain poor and the continued decline of the population size presents risk for retailers.

Opportunities for retail growth will be limited in the medium term to 2019. A lack of impetus to continue with political and economic reforms will dampen investors' enthusiasm, and economic growth is forecast to be sluggish, at 1.0% this year, not rising above 2.0% until after the end of our forecast period. Bulgaria's shaky financial system is under strain as a result of exposure to Greek banks as well as past bankruptcies, including the default by Corporate Commercial Bank in 2014. Even though Bulgaria's public debt is the second smallest in the EU (27.6% of GDP in 2014; only Estonia has a lower rate), it is struggling to balance its budget. The parliament was seeking to approve the issue of EUR8bn of bonds over the next three years.

Fitch approved new Issuer Default Ratings for Bulgaria in June 2015, assessing its long-term foreign currency debt with BBB- and local currency debt with BBB with a stable outlook. Such ratings may prevent the country from borrowing cheaply in the next five years.

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