

# Bulgaria Shipping Report Q3 2015

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## Abstracts

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**BMI View:** The Port of Varna will see cargo growth in the low single percentage digits this year, both in terms of bulk tonnage and containers handled. Tonnage has always been rather volatile at the port. Our numbers reflect a steep decline last year according to official data. For 2015, we now expect a very small recovery. The general deceleration of Bulgaria's foreign trade growth will be a key factor. Box traffic growth will also be subdued, but a little stronger than last year, in part because - although constrained - domestic consumption remains the main driver of the economy and tends to require a high proportion of containerised imports.

The outlook for the Bulgarian economy is one of subdued growth. On the plus side, domestic consumption is receiving a boost from low international oil prices, growing real wages, and falling unemployment. But an overvalued national currency, high private sector debts, and weak investment are acting as obstacles to growth. The Bulgarian lev is pegged to the Euro. Lacking exchange rate flexibility, Bulgaria has pursued policies aimed at achieving an internal devaluation - a reduction of internal prices to regain competitiveness.

Meanwhile, real wages grew 4.6% in 2014, boosting disposable incomes. Given that demand for credit remains weak, we expect rising disposable incomes to be the driving force behind Bulgaria's largely creditless recovery. These factors are reflected in our forecast of 1.1% GDP growth this year (down from 1.7% in 2014). Next year, we believe growth will pick up modestly to 1.4%. Over the medium term (2015-2019), we expect it will average 1.7% per annum.

## Contents

BMI Industry View

SWOT

Shipping

Political

Economic

Operational Risk

Industry Forecast

Port Of Varna Throughput

Table: Major Ports Data (Bulgaria 2012-2019)

Table: Trade Overview (Bulgaria 2012-2019)

Table: Key Trade Indicators (Bulgaria 2012-2019)

Table: Top Import Sources, 2006-2013 (USDmn)

Table: Top Export Destinations 2006-2013, (USDmn)

Market Overview

Bulgaria Container Shipping Market Overview

Company Profile

Navibulgar

Shipping - Global Industry View

Three Container Routes To Watch In 2015

Global Company Strategy

Maersk Line

Mediterranean Shipping Company (MSC)

CMA CGM

Evergreen Line

COSCO Container Lines Company (COSCON)

Macroeconomic Forecasts

Economic Analysis

Table: GDP Contribution To Growth (Bulgaria 2012-2020)

Demographic Forecast

Demographic Outlook

Table: Population Headline Indicators (Bulgaria 1990-2025)

Table: Key Population Ratios (Bulgaria 1990-2025)

Table: Urban/Rural Population & Life Expectancy (Bulgaria 1990-2025)

Table: Population By Age Group (Bulgaria 1990-2025)

Table: Population By Age Group % (Bulgaria 1990-2025)

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