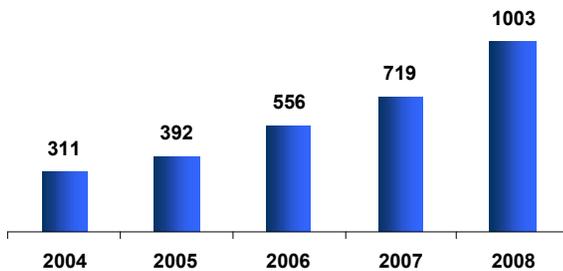


BULGARIA: NONMETALLIC MINERAL PRODUCTS FACTSHEET

InvestBulgaria Agency – March 2010

Foreign direct investment

Cumulative FDI in other nonmetallic mineral products' sector (Mio. USD)



Source: NSI

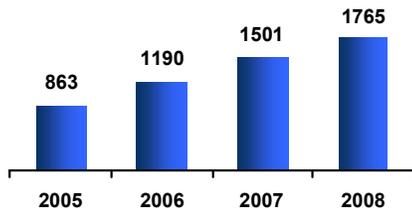
Market review

Company	Net sales (EUR m), 2008
Devnya Cement JSC - Devnia	133,94
Zlatna Panega Cement JSC - Zlatna Panega	124,58
Holcim Bulgaria JSC - Beli izvor	121,90
Trakia Glass Bulgaria SPJSC - Targovishte	116,82
Drujba Glass Works JSC - Sofia	110,70
Ideal Standard Bulgaria SPJSC - Sevlievo	45,08
Vulkan Ciment JSC - Dimitrovgrad	42,05
Xella Bulgaria SPLTD - Sofia	32,25
Building Materials and Systems ABO Ltd - Plovdiv	23,88
Baumit Bulgaria – Elin Pelin	23,68

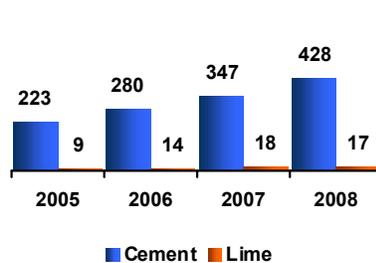
Source: BEIS

Production

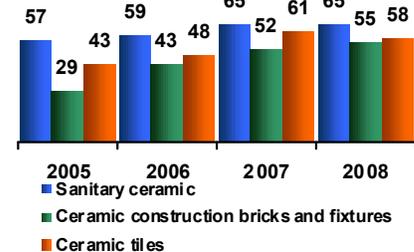
Manufacture of products from other non-metallic mineral materials, 2005-2008 (EUR m)



Production of cement and lime, 2005-2008 (EUR m)



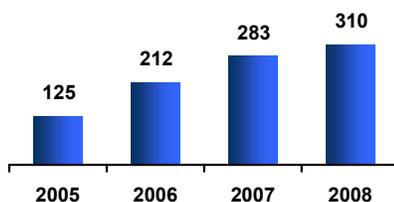
Production of ceramic products, 2005-2008 (EUR m)



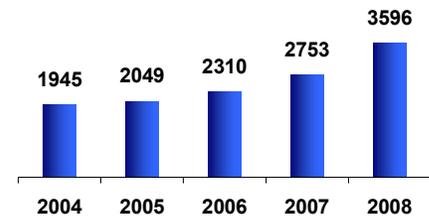
Source: NSI

Labour cost

Production of glass and glass products, 2005-2008 (EUR m)



Annual average earnings in the sector (Euro)



Source: NSI

Success story

Roca Bulgaria AD



- ✓ Part of Roca Corporacion Empresarial, S.A , Spain
- ✓ Entering the Bulgarian market in 1999
- ✓ 2 factories for sanitary ware in Kaspichan (Shumen Municipality)
- ✓ Total annual output is about 1 Mio. pieces of high-quality sanitary ware
- ✓ About 350 employees
- ✓ Total investments – ca. € 32mln for modernization and expansion in cement production
- ✓ State-of-the-art production facilities, environmental friendly manufacturing
- ✓ 50% of the production is exported mainly to the EU and to the neighbouring countries
- ✓ 3 leading brands – the Spanish Roca, the Bulgarian Fayans and the Swiss Laufen

Wienerberger Bulgaria



- ✓ Part of Wienerberger AG, Austria – the biggest brick manufacturer in the world and No.1 on the clay roof tiles market in Europe
- ✓ Present on the Bulgarian market since 2004
- ✓ 2008 – Entering in Bulgaria through opening of the production plant for clay blocks in Lukovit
- ✓ 25 Mio. Euro investment
- ✓ Investor of the Year 2008 award for this project
- ✓ 2 other production sites in the country: in Silistra (concrete roof tiles) and Pelin village (concrete pavers)

InvestBulgaria Agency
31 Aksakov Str
1000 Sofia, Bulgaria
iba@investbg.government.bg
www.investbg.government.bg

