EU Investment Survey.
How European investments contribute to industrialisation in Mozambique – a Snapshot
Introduction.

This brochure presents a snapshot of the presence and impact of the European investors and businesses in Mozambique. This analysis, made by the European Commission, DG International Partnerships, is conducted in a strong Team Europe spirit and contains indicative data, provided on a voluntary basis by 150 different companies. The survey provides information on investment characteristics; economic impact; barriers and opportunities for investment.

The European Union and Mozambique have been close partners for almost 40 years. Since then, both have been working hand in hand, bringing prosperity to its citizens and building a close relationship in political, social, cultural and economic matters.

As the country’s largest trading and investment partner, the European Union wishes to promote a favourable business climate to foster a sustainable and inclusive economy. To this end, mapping out the EU business presence in-country is a step towards strengthening the potential of the private sector in the Mozambican economy, in line with the Government’s Five-Year Programme (PQG) 2020-2024 and the Global Gateway initiative.

With thanks to the EU Member States, EuroCam and Mozambican and European Chambers of Commerce who have contributed to this product.

The survey will remain open so that companies can keep contributing with data and a proper follow-up can be ensure to the first edition of the Mozambique-EU Global Gateway Investment Forum 2023. Please consult the following link: https://ec.europa.eu/eusurvey/runner/EUinvestmentMozambique

Enjoy the reading!
Snapshots of EU Investment in Mozambique 2023.
2 EU Companies present in Moz.

Origin of EU firms
(percentage by Member State)
Source: EU Investment Mapping

- Portugal 47.0%
- Belgium 2.6%
- Slovenia 1.3%
- Austria 0.0%
- Sweden 4.6%
- Spain 7.3%
- Finland 17.2%
- Czech Republic 0.0%
- Bulgaria 0.0%
- Denmark 1.3%
- Finland 1.3%
- Estonia 0.0%
- Cyprus 0.0%
- Germany 5.3%
- Greece 4.0%
- Ireland 2.0%
- Italy 9.9%
- Latvia 0.7%
- Malta 0.7%
- Netherlands 6.0%
- France 1.0%
- Hungary 0.0%
- Lithuania 0.0%
- Luxembourg 0.0%
- Romania 0.0%
- Croatia 0.0%
- Slovenia 1.3%
- Serbia 0.0%
- Slovakia 0.7%
- Greece 4.0%
- Croatia 0.0%

Firm’s Age
Source: EU Investment Mapping

- < 5 years
  - 32
  - 21%
- 5 - 10 years
  - 35
  - 23%
- > 10 years
  - 83
  - 55%

Link to EU
Source: EU Investment Mapping

- Portugal 47.0%
- Belgium 2.6%
- Slovenia 1.3%
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- Czech Republic 0.0%
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- Romania 0.0%
- Croatia 0.0%
- Slovenia 1.3%
- Serbia 0.0%
- Slovakia 0.7%
- Greece 4.0%
- Croatia 0.0%

Company Size
Source: EU Investment Mapping

- Big > 250
  - 12%
  - 30%
- Medium > 250
  - 23%
- Small < 50
  - 36%
- Micro < 10
  - 30%

Mozambique
Number of replies
151

- My firm has EU shareholders
  - 87%
- My firm has EU capital
  - 77%
- My firm’s headquarters are in the EU
  - 48%
- My firm is registered in the EU
  - 100%
- My firm’s CEO / top manager in Mozambique is European
  - 81%

Mozambique
Number of replies
151

- Big > 250
  - 12%
- Medium > 250
  - 23%
- Small < 50
  - 36%
- Micro < 10
  - 30%
### Main Sector of Activity

**Source:** EU Investment Mapping

#### Mozambique

**Number of replies:** 151

<table>
<thead>
<tr>
<th>Percentage</th>
<th>Number</th>
<th>Sector Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>9%</td>
<td>13</td>
<td>Accountancy, financial or legal services</td>
</tr>
<tr>
<td>3%</td>
<td>4</td>
<td>Agribusiness, fresh products</td>
</tr>
<tr>
<td>7%</td>
<td>11</td>
<td>Agribusiness, processed products</td>
</tr>
<tr>
<td>0%</td>
<td>0</td>
<td>Chemicals</td>
</tr>
<tr>
<td>1%</td>
<td>2</td>
<td>Clothing, yarn, fabrics, textile or leather</td>
</tr>
<tr>
<td>2%</td>
<td>3</td>
<td>Communication services</td>
</tr>
<tr>
<td>8%</td>
<td>12</td>
<td>Computer, digital, ICT services</td>
</tr>
<tr>
<td>0%</td>
<td>0</td>
<td>Computer or electronic goods</td>
</tr>
<tr>
<td>21%</td>
<td>31</td>
<td>Construction or engineering services</td>
</tr>
<tr>
<td>2%</td>
<td>3</td>
<td>Construction materials</td>
</tr>
<tr>
<td>2%</td>
<td>3</td>
<td>Education services</td>
</tr>
<tr>
<td>13%</td>
<td>20</td>
<td>Energy or environmental services (green &amp; sustainable economy)</td>
</tr>
<tr>
<td>7%</td>
<td>10</td>
<td>Health or social services</td>
</tr>
<tr>
<td>4%</td>
<td>6</td>
<td>Miscellaneous manufactured goods</td>
</tr>
<tr>
<td>0%</td>
<td>0</td>
<td>Non-electric machinery</td>
</tr>
<tr>
<td>7%</td>
<td>11</td>
<td>Oil, gas or raw materials including mining</td>
</tr>
<tr>
<td>4%</td>
<td>6</td>
<td>Tourism services</td>
</tr>
<tr>
<td>9%</td>
<td>13</td>
<td>Transport &amp; distribution services</td>
</tr>
<tr>
<td>1%</td>
<td>2</td>
<td>Transport equipment</td>
</tr>
<tr>
<td>1%</td>
<td>1</td>
<td>Wood &amp; paper</td>
</tr>
</tbody>
</table>

### Main Access to Finance

**Source:** EU Investment Mapping

#### Mozambique

**Number of replies:** 151

<table>
<thead>
<tr>
<th>Sector Description</th>
<th>Percentage</th>
<th>Number</th>
</tr>
</thead>
<tbody>
<tr>
<td>Relatives, friends or close relationships</td>
<td>5%</td>
<td>4</td>
</tr>
<tr>
<td>Accountancy, financial or legal services</td>
<td>45%</td>
<td>45</td>
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<tr>
<td>Accountancy, financial or legal services</td>
<td>19%</td>
<td>19</td>
</tr>
<tr>
<td>Accountancy, financial or legal services</td>
<td>15%</td>
<td>15</td>
</tr>
<tr>
<td>Accountancy, financial or legal services</td>
<td>9%</td>
<td>9</td>
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<tr>
<td>Accountancy, financial or legal services</td>
<td>7%</td>
<td>7</td>
</tr>
<tr>
<td>Accountancy, financial or legal services</td>
<td>1%</td>
<td>1</td>
</tr>
</tbody>
</table>
3Motivation to invest in Moz.

Market Outlook
Source: EU Investment Mapping

<table>
<thead>
<tr>
<th>Mozambique</th>
<th>Number of replies</th>
</tr>
</thead>
<tbody>
<tr>
<td>95</td>
<td>63%</td>
</tr>
<tr>
<td>41</td>
<td>27%</td>
</tr>
<tr>
<td>54</td>
<td>36%</td>
</tr>
</tbody>
</table>

Invest in country due to:
- Local market: 95 (63%)
- Regional market: 41 (27%)
- International market: 54 (36%)

4Economic and Social Impact of EU Investment.

Economic Impact
Source: EU Investment Mapping

<table>
<thead>
<tr>
<th>All data</th>
<th>Number of replies</th>
</tr>
</thead>
<tbody>
<tr>
<td>1,802</td>
<td>Mozambique</td>
</tr>
<tr>
<td>151</td>
<td>Number of replies</td>
</tr>
</tbody>
</table>

Number | Percentage | Invest in country due to: |
<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td>Local market</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Regional market</td>
</tr>
<tr>
<td></td>
<td></td>
<td>International market</td>
</tr>
</tbody>
</table>

Number | Percentage | In 5 years the local market will: |
<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>16</td>
<td>11%</td>
<td>Be tougher</td>
</tr>
<tr>
<td>16</td>
<td>11%</td>
<td>Remain the same as it is now</td>
</tr>
<tr>
<td>60</td>
<td>40%</td>
<td>Fairly grow</td>
</tr>
<tr>
<td>42</td>
<td>28%</td>
<td>Highly grow</td>
</tr>
</tbody>
</table>

Number | Percentage | In 5 years the regional market will: |
<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>16</td>
<td>11%</td>
<td>Tougher</td>
</tr>
<tr>
<td>22</td>
<td>15%</td>
<td>Remain the same as it is now</td>
</tr>
<tr>
<td>56</td>
<td>37%</td>
<td>Fairly grow</td>
</tr>
<tr>
<td>37</td>
<td>25%</td>
<td>Highly grow</td>
</tr>
</tbody>
</table>

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</table>

Annual turnover
- All data: 40,933,573,066 €
- Average: 23,113,254 €
- Mozambique: 1,897,410,622 €
- Average: 12,907,555 €

Taxes paid in the country per year [all taxes included]
- All data: 2,555,524,879 €
- Average: 1,637,108 €
- Mozambique: 175,172,708 €
- Average: 1,167,818 €

Investment already placed in country in the last 5 years
- All data: 16,387,594,270 €
- Average: 11,132,877 €
- Mozambique: 721,066,663 €
- Average: 7,590,175 €

Estimated forecasted investment in the next 5 year
- All data: 13,608,168,340 €
- Average: 10,983,187 €
- Mozambique: 3,550,094,481 €
- Average: 37,369,416 €
Main barriers to Investment by EU Companies.

**Corporate Social Responsibility**
Source: EU Investment Mapping

- **All data**
  - Number of replies: 1,802
  - 31% of CSR actions per year, 15,487 actions
  - 35% of CSR actions per year, 17,590 actions
  - 17% of CSR actions per year, 560 actions

- **Mozambique**
  - Number of replies: 151
  - 34% of CSR actions per year, 16,773 actions
  - 62% of CSR actions per year, 2,018 actions
  - 21% of CSR actions per year, 679 actions

**Green actions Inc. Carbon footprint, environment & biodiversity**
- 31% of CSR actions per year
- 34% of CSR actions per year

**Innovation actions incl. training and R&D**
- 35% of CSR actions per year
- 62% of CSR actions per year

**Social actions incl. labour policies and fair trade**
- 17% of CSR actions per year
- 21% of CSR actions per year