

European Union (EU)

February 2026

Executive Summary

This fact sheet provides key trade and investment-related statistics for the European Union (EU) and its relationship with South Africa and the Western Cape. Specifically, it shows the EU's trade and investment flows with South Africa and the Western Cape, including an analysis of top markets and products. It also analyses tourism trends between the EU, South Africa, and the Western Cape. The key highlights are provided below.

Economy

- The EU economy was valued USD15.71trn in 2024, having grown by 1.06% in 2023–2024.
- Gross domestic product (GDP) per capita in the EU was estimated at USD34,896 in 2024.
- The financial intermediation, real estate, renting and business activities sector is the EU's largest contributor to its economic output, accounting for 30% of economic output in 2024.

Trade

- In 2024 South Africa exported goods to the value of USD20.34bn to the EU and imported USD23.30bn worth of goods from the region.
- Among the EU member states, Germany was the leading destination market for South African exports which were valued at USD8.36bn; and accounted for 41.10% of the value of South Africa's exports to the EU in 2024. Germany was also the top source market for imports from the EU into South Africa at an associated cost of USD7.08bn, equivalent to 30.39% of the value of EU imports to South Africa in 2024.
- Motor cars was the top export product from South Africa to the EU in 2024, valued at USD4.12bn. Original equipment components was the top import product from the EU into South Africa in 2024, at a value of USD4.13bn.
- The Western Cape exported goods worth USD2.41bn to the EU in 2024, and imported goods valued at USD3.07bn from the region.
- The Netherlands was the leading EU destination market for the Western Cape's exports in 2024, with exports at a value of USD1.12bn. While Italy was the leading EU source market for goods imported by the province in 2024, with imports valued at USD687.44m.
- The top export product from the Western Cape to EU in 2024 was grapes, valued at USD389.35m and petroleum oils, other than crude was the Western Cape's largest imported product from the EU in 2024, valued at USD329.68m.

Investments

- According to FDI Markets, between January 2015 and November 2025, EU-based companies invested in 448 foreign direct investment (FDI) projects in South Africa. These were valued at USD19.91bn and resulted in the creation of 39,739 jobs during this period.
- Between January 2015 and November 2025, South Africa invested in 171 FDI projects in the EU at a cumulative value of USD4.42bn.

Tourism

- Nationally, in 2024, South Africa welcomed 802,807 tourists from 27 EU countries, reflecting a 2.03% increase from 786,818 tourist arrivals in 2023. Tourists from 12 of these EU countries spent an average of 15.1 nights in South Africa and contributed more than ZAR16.00 billion in foreign direct spend to the national economy.
- Provincially, the Western Cape attracted a total of 420,937 visitors from 12 of the 27 EU nations in 2024. This represented a 1.11% increase compared to 416,335 arrivals recorded in 2023 and a rise of 47.6% compared to 2022. The average length of stay for tourists in the province was 11.2 nights and resulted in more than ZAR7.45 billion in foreign direct spend which supported businesses, services, and employment opportunities throughout the Western Cape.

Cape Town and the Western Cape – A Leading Regional Economy

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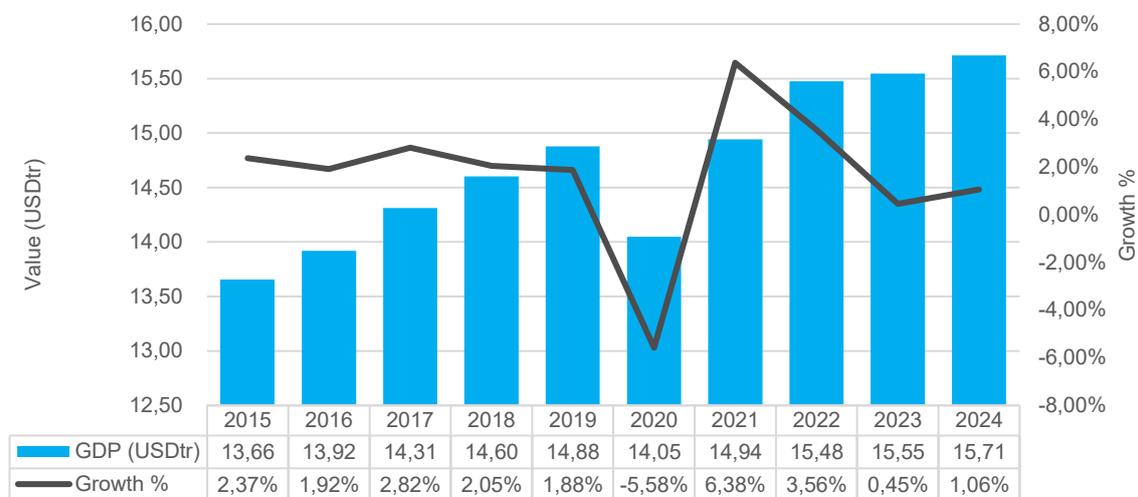
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1. Economic Overview

The EU economy is worth an estimated USD16 trillion. This is the third-largest economy in the world after the United States and China (World Economic Forum, 2023; World Bank, 2026). As Figure 1 shows, the EU's real GDP grew by a modest 1.06% y-o-y in 2024, according to data from the World Bank. This marked a second consecutive year of a one-percent growth. Various sources cite different reasons for this trend, including the effect of the Russia-Ukraine war and rising trade tensions that continue to slow down the European economy (OECD, 2025; European Commission, 2025). The Union's largest contributing economy, Germany, has also been experiencing a decline since 2019. The EU has responded with strong policies to the external shocks; however, the near-term outlook is said to be clouded by elevated uncertainty. Moreover, the trend in growth is also shown by the EU's modest growth during the past 10 years which reflected an annual average growth rate of 1.69% from 2015 to 2024.

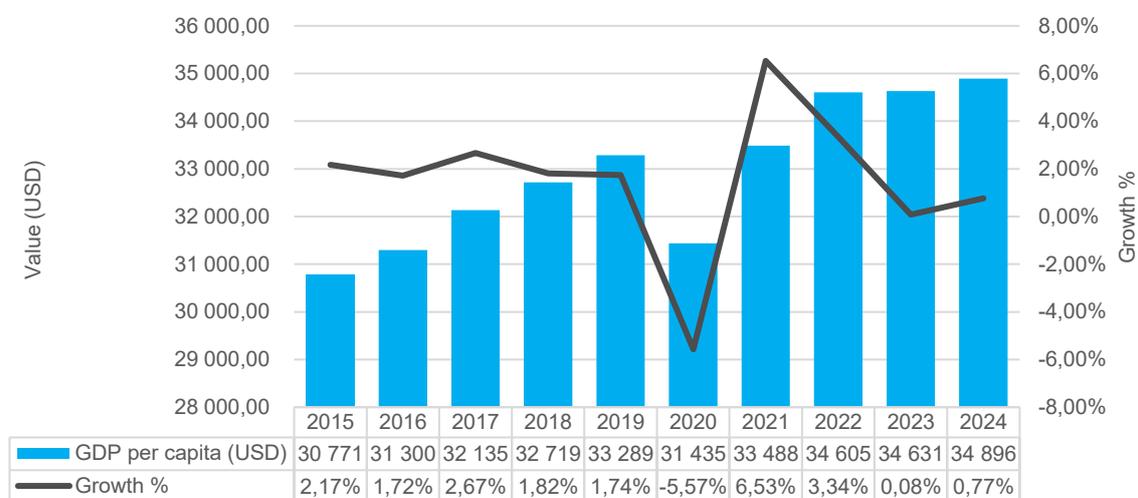
Figure 1: The EU's real GDP (constant 2015 US\$), 2015–2024



Source: World Bank (2025)

Real GDP per capita is a measure of output (or income) produced per person in an economy. In 2024, the EU's real GDP per capita was estimated at USD34,896 which represented an overall increase over the 10-year period from USD30,771 in 2015. This can be seen in Figure 2. Also notable is that the trend in real GDP per capita was similar to that of real GDP (with an annual average growth rate of 1.53% from 2014 to 2024) - this is indicative of the way the economy has absorbed shocks and grown at a slow pace.

Figure 2: The EU's real GDP per capita, 2015–2024

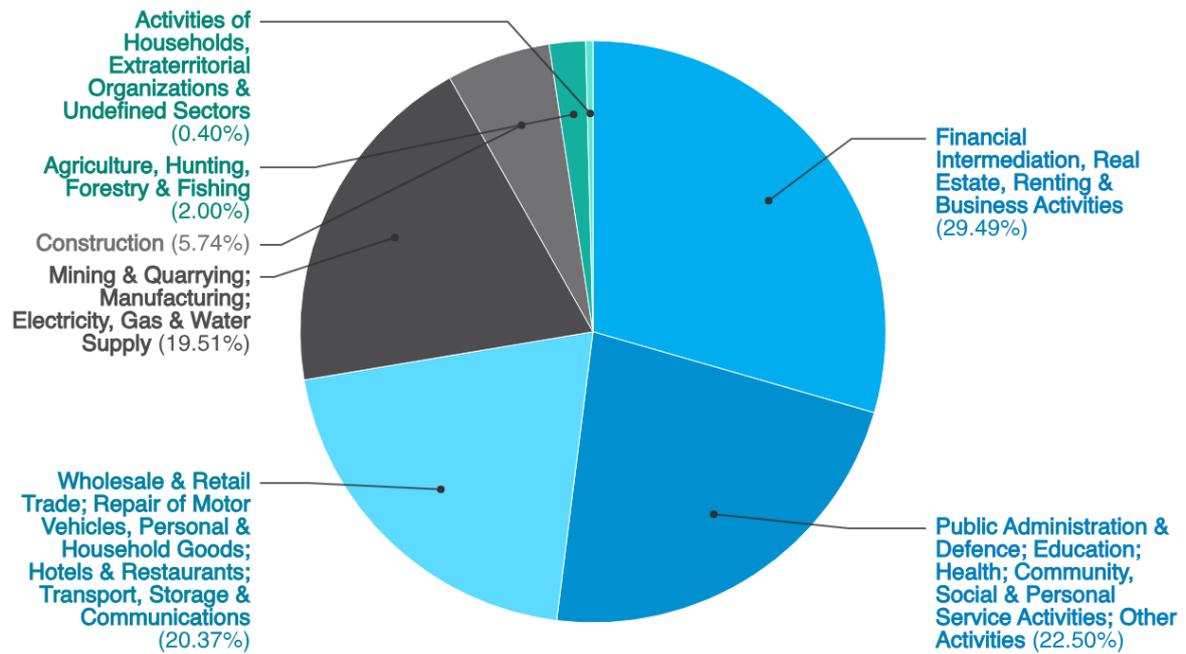


Source: World Bank (2025)

Figure 3 illustrates the sectoral contributions to the EU's gross value added (GVA) in 2024. The primary contributors to GVA were:

- Financial intermediation, real estate, renting, and business activities (with a share of 29.49%)
- Public Administration and defence; education; health; community, social and personal service activities; other activities (with a share of 22.50%)
- Wholesale and retail trade; repair of motor vehicles, motorcycles, personal and household goods (with a share of 20.37%)
- Mining and quarrying; manufacturing; electricity, gas, and water supply (with a share of 19.51%).

Figure 3: Sectoral contributions to the EU's GVA (%), 2024



Source: Euromonitor (2024)

2. Trade

2.1. South Africa's trade with the EU

South Africa's trade with the EU from 2015 to 2024 is shown in Figure 4. Traditionally, South Africa has been a net importer of goods from the EU, with the country recording a trade deficit with the region throughout the period under review except in 2021 and 2022. In 2024, South Africa's associated export earnings from trade with the EU were valued at USD20.34bn, a decline of –8.85% compared to the previous year's value of USD22.31bn. In a similar manner, the value of South Africa's imports from the EU decreased by –6.81% y-o-y from USD25.00bn in 2023 to USD23.30bn in 2024.

Overall, total exports increased at an average annual growth rate of 5.40% over the 5-year period 2015–2024, and imports at 1.53%.

Figure 4: South Africa's trade with the EU, 2015–2024



Source: Quantec (2025)

Note: The USD values in the data were derived by converting ZAR values to USD using the exchange rate specified by SARB 2024, as sourced from Quantec.

Regarding export markets, in 2024 Germany was the leading destination market for South Africa's exports to the EU, as demonstrated in Table 1. At a value of USD8,358.92m (or USD8.36bn), these exports accounted for 41.10% of the nation's total exports to the Union. Exports to the Netherlands, South Africa's second-largest export market in the EU, were valued at USD4,233.42m (or USD4.23bn) in 2024, while Belgium was the third-largest destination, with exports to the value of USD3,088.90m (or USD3.70bn).

The fastest-growing markets (as measured by the highest average annual growth rate) among South Africa's top 10 export markets in the EU over the past five years (2020–2024) were Greece (with an average annual growth rate of 36.17%), Italy (12.21%), and the Netherlands (10.67%).

On the import front (shown in Table 1 as well), Germany was also the leading source market for goods imported by South Africa from the EU in 2024. Imports from this country were valued at USD7,082.29m (or USD7.08bn), equivalent to 30.39% of total value of EU imports to South Africa. Italy, with imports costing USD2,462.29m, and France (USD1,966.92m) were in second and third place.

The fastest-growing markets among the top 10 markets for imports to South Africa over the five years leading up to and including 2023 were Austria (with an average annual growth rate of 9.56%), Poland (8.25%) and the Netherlands (7.01%).

Table 1: South Africa's top 10 export and import markets with EU member states, 2024

Export Market	Value, 2024 (USDm)	Ave. Annual Growth % (2020–2024)	Rank	Import Market	Value, 2024 (USDm)	Ave. Annual Growth % (2020–2024)
Germany	8 358.92	4.63%	1	Germany	7 082.29	-2.24%
Netherlands	4 223.42	10.67%	2	Italy	2 462.95	4.33%
Belgium	3 088.80	5.21%	3	France	1 966.92	0.99%
Spain	1 368.19	6.57%	4	Spain	1 576.85	0.12%
Italy	884.60	12.21%	5	Poland	1 392.72	8.25%
France	541.46	-1.36%	6	Netherlands	1 284.88	7.01%
Czech Republic	344.20	3.16%	7	Sweden	1 193.13	5.62%
Greece	207.16	36.17%	8	Belgium	1 146.00	6.77%
Portugal	191.00	3.58%	9	Austria	821.38	9.56%
Ireland	166.95	10.08%	10	Czech Republic	787.92	-0.81%
Total Exports	20 339.00	5.40%		Total Imports	23 302.17	1.53%

Source: Quantec (2025)

Note: The USD values in the data were derived by converting ZAR values to USD using the exchange rate specified by SARB, 2025, as sourced from Quantec 2025.

Table 2 lists South Africa's exports to and imports from the EU in 2024. The country's largest export product to the EU in that year was motor cars, valued at USD4,121.72m and equivalent to 20.27% of South Africa's total export earnings from the EU in 2024. Exports of motor vehicles for the transport of goods (with a value of USD2.88bn); and of iron ore and concentrates including roasted iron pyrites (USD1,107.91m) were in second and third place, respectively.

The fastest-growing export product categories (as measured by the highest average annual growth rate) over the past five years (2020–2024) were platinum, palladium, rhodium, and iridium, unwrought (with a growth rate of 25.11%); precious metal ores and concentrates (21.45%); and unwrought aluminium (20.31%).

South Africa's top import product from the EU in 2024 was original equipment components at a value of USD4,125.76m, and equivalent to 17.71% of the value of total imports. This was followed by petroleum oils, other than crude (USD1,061.07m), and motor cars (USD838.20m).

The fastest-growing import product categories (as measured by the highest average annual growth rate) over the past five years (2020–2024) were petroleum oils, other than crude (with a growth rate of 31.07%), centrifuges, including centrifugal dryers (7.93%) and automatic data processing machines and units (4.36%).

Table 2: South Africa's top 10 traded products with the EU, 2024

Export product	Value, 2024 (USDm)	Ave. Annual growth % (2020-2024)	Rank	Import product	Value, 2024 (USDm)	Ave. Annual growth % (2020-2024)
Motor cars	4121.72	1.14%	1	Original equipment components	4125.76	3.58%
Motor vehicles for the transport of goods	2923.19	17.27%	2	Petroleum oils, other than crude	1061.07	31.07%
Iron ores and concentrates, including roasted iron pyrites	1107.91	14.49%	3	Motor cars	838.20	-7.20%
Platinum, Palladium, Rhodium and Iridium, unwrought	1004.69	25.11%	4	Medicaments	812.34	-0.81%
Ferro-alloys	716.54	13.76%	5	Parts and accessories of the motor vehicles	719.21	1.93%
Centrifuges, including centrifugal dryers	704.65	-4.52%	6	Automatic data processing machines and units	386.98	4.36%
Citrus fruit	638.76	10.55%	7	Motor vehicles for the transport of goods	272.05	1.79%
Precious metal ores and concentrates	584.62	21.45%	8	Centrifuges, including centrifugal dryers	241.80	7.93%
Grapes	543.97	15.98%	9	Human blood; animal blood prepared	241.21	2.19%
Unwrought aluminium	475.38	20.31%	10	Parts of machinery	217.71	0.92%
Total Exports	20339.00	5.40%		Total imports	23302.17	1.53%

Source: Quantec (2025)

Note: The USD values in the data were derived by converting ZAR values to USD using the exchange rate specified by SARB 2024, as sourced from Quantec 2025

2.2. The Western Cape's trade with the EU

The Western Cape's trade with the EU from 2015 to 2024 is shown in Figure 5. The Western Cape was a net importer of goods from the EU, consistently maintaining a negative trade balance throughout the 10-year period. In 2024, the province exported goods worth USD2.41bn to the EU, representing an increase of 14.71% y-o-y from 2023's value of USD2.10bn. Imports from EU member countries were valued at USD3.07bn, declining by -0.42% y-o-y from USD3.08 in 2023. Overall, both exports and imports increased over the past decade (2015-2024). Exports increased at an average annual growth rate of 4.64% and imports at 1.98%.

Figure 5: The Western Cape's trade with the EU, 2015–2024



Source: Quantec (2025)

Note: The USD values in the data were derived by converting ZAR values to USD using the exchange rate specified by SARB 2025, as sourced from Quantec 2025.

Table 3 shows that the Netherlands was the leading EU destination market for the Western Cape's exports in 2024. Exports to this country were valued at USD1,118.69m, accounting for 46.43% of the value of total exports. Germany, with exports valued at USD309.72bn, and Spain (USD197.53m) were in second and third place.

The fastest-growing export markets in the EU (as measured by the highest average annual growth rate) in the past five years (2020–2024) were Ireland (with an average annual growth rate of 16.82%), the Netherlands (13.07%), and France (8.05%).

On the import front, Italy was the leading EU source market for goods imported by the province in 2024, with imports from the country costing USD687.44m and equivalent to 22.38% of the cost of total imports. Germany (with imports valued at USD534.61m) and the Netherlands (USD409.98m) were second and third.

The fastest-growing import markets in the EU, as measured by the highest average annual growth rate, in the past five years (2020–2024) were Austria (with an average annual growth rate of 71.08%), Italy (20.50%), and Belgium (9.94%).

Table 3: Top 10 EU countries for Western Cape exports and imports, 2024

Export market, 2024	Value, 2024 (USDm)	Ave. annual growth % (2020-2024)	Rank	Import market, 2024	Value, 2024 (USDm)	Ave. annual growth % (2020-2024)
Netherlands	1 118.69	13.07%	1	Italy	687.44	20.50%
Germany	309.72	-1.73%	2	Germany	534.61	0.10%
Spain	197.53	5.69%	3	Netherlands	409.98	5.84%
France	168.35	8.05%	4	Belgium	349.83	9.94%
Italy	162.65	5.20%	5	France	316.38	8.43%
Portugal	80.51	4.63%	6	Spain	226.19	-3.55%
Belgium	73.92	10.99%	7	Ireland	90.29	-0.85%
Denmark	63.71	6.11%	8	Austria	71.08	45.95%
Ireland	49.26	16.82%	9	Sweden	52.93	7.74%
Sweden	39.68	0.31%	10	Poland	50.88	-3.42%
Total Exports	2 409.30	7.54%		Total Imports	3 071.92	3.45%

Source: Quantec (2025)

Note: The USD values in the data were derived by converting ZAR values to USD using the exchange rate specified by SARB 2025, as sourced from Quantec 2025.

The top export product from the Western Cape to EU in 2024 was grapes, valued at USD389.35m and accounting for 16.16% of the value of total exports. Citrus fruit, at a value of USD386.54m; and wine, valued at USD211.32m, were the second and third-largest export products from the province to the EU, as shown in Table 4.

The fastest-growing export product categories (as measured by the highest average annual growth rate) in the past five years (2020–2024) were yachts and other vessels for pleasure or sports, rowing boats and canoes (with a growth rate of 38.43%); apricots, cherries, peaches (including nectarines), plums (23.86%); and parts for engines (20.80%).

Petroleum oils, other than crude was the Western Cape's largest imported product from the EU in 2024, valued at USD329.68m and equivalent to 10.73% of the province's total import costs incurred with the EU in that year. This was followed by undenatured ethyl alcohol at a cost of USD180.17m; and waters, including mineral waters and aerated waters, containing added sugar (USD91.08m).

The fastest-growing import products (as measured by the highest average annual growth rate) in the past five years (2020–2024) were petroleum oils and oils, other than crude (with a growth rate of 39.99%); undenatured ethyl alcohol (25.95%); and waters, including mineral waters and aerated waters, containing added sugar (24.24%).

Table 4: Top 10 Western Cape traded products with the EU, 2024

Exports, 2024	Value, 2024 (USDm)	Ave. Annual growth % (2020-2024)	Rank	Imports, 2024	Value, 2024 (USDm)	Ave. Annual growth % (2020-2024)
Grapes	389.35	16.58%	1	Petroleum oils and oils, other than crude	329.68	39.99%
Citrus fruit	386.54	10.81%	2	Undenatured ethyl alcohol	180.17	25.95%
Wine	211.32	-1.16%	3	Waters, including mineral waters and aerated waters, containing added sugar	91.09	24.24%
Apples, pears and quinces	125.50	14.22%	4	Dish washing machines; machinery for cleaning or drying bottles or other containers	41.68	7.69%
Fish fillets and other fish meat	111.52	1.31%	5	Cartons, boxes, cases, bags and other packing containers, of paper, paperboard	41.58	21.73%
Parts for engines	81.33	20.80%	6	Wine	41.27	11.10%
Apricots, cherries, peaches (including nectarines), plums	75.84	23.86%	7	Refrigerators, freezers and other refrigerating or freezing equipment	38.75	7.97%
Fish, frozen, excluding fish fillets and other fish meat	72.14	-0.46%	8	Beauty or make-up preparations and preparations	37.87	15.49%
Other fruit	66.39	4.39%	9	Preparations of a kind used in animal feeding	36.98	16.04%
Yachts and other vessels for pleasure or sports; rowing boats and canoes	62.41	38.43%	10	Medicaments	35.67	3.58%
Total Exports	2 409.30	7.54%		Total Imports	3 071.92	3.45%

Source: Quantec (2025)

Note: The USD values in the data were derived by converting ZAR values to USD using the exchange rate specified by SARB 2025, as sourced from Quantec 2025.

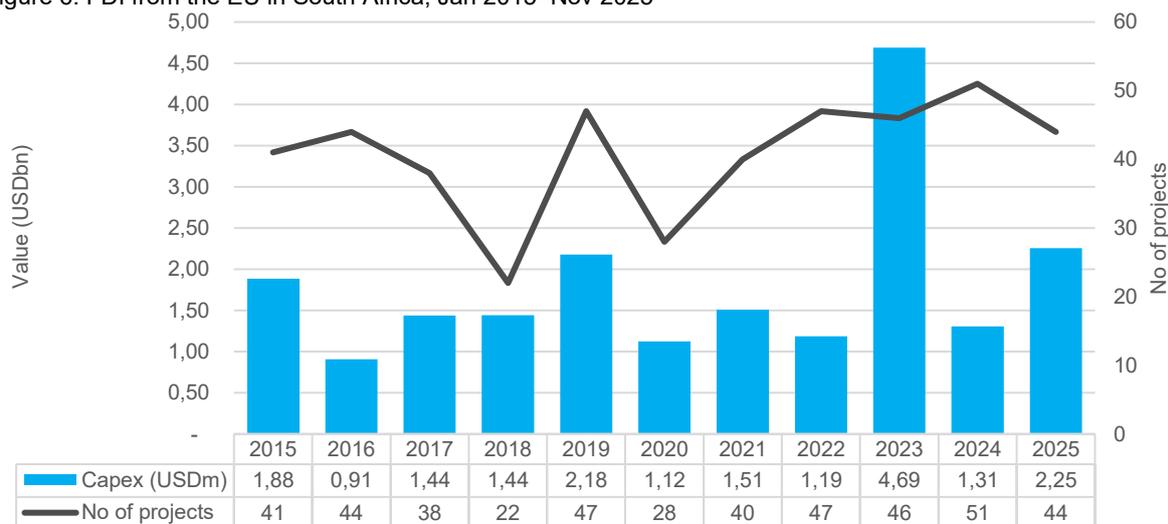
3. Foreign Direct Investment

This section analyses the EU's foreign direct investment (FDI) flows with South Africa, and those between the EU and the Western Cape from January 2015 to November 2025.

3.1. Inward FDI from the EU in South Africa

As reported by fDi Markets, between January 2015 and November 2025, a total of 448 FDI projects from the EU materialised in South Africa, amounting to a total capital expenditure (capex) of USD19.91bn. This resulted in the creation of an estimated 39,739 jobs. This is represented in Figure 6.

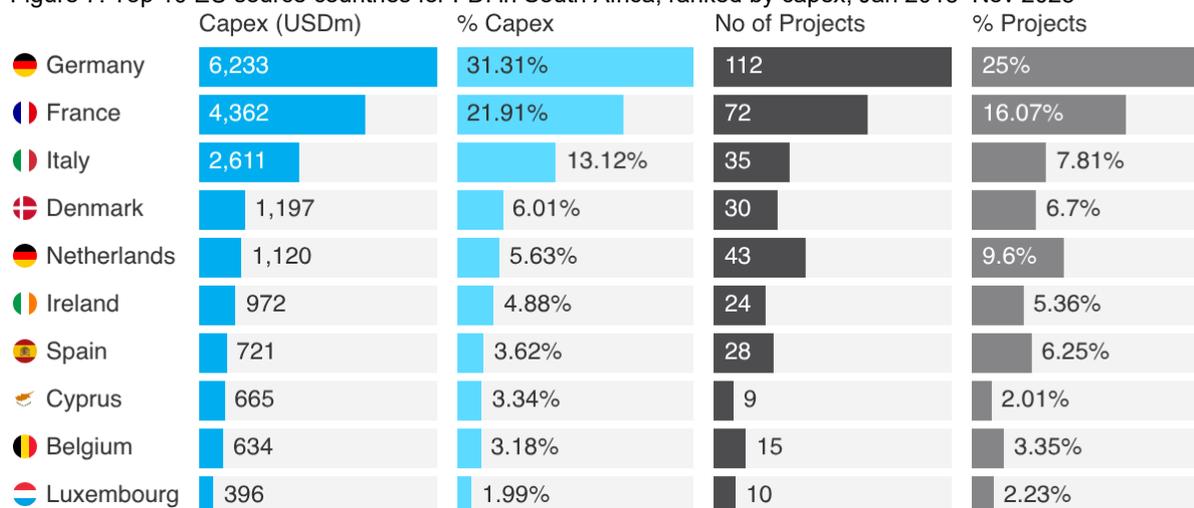
Figure 6: FDI from the EU in South Africa, Jan 2015–Nov 2025



Source: fDi Markets, a service from The Financial Times 2026. All Rights Reserved

Among the EU members, Germany was the leading source market for FDI in South Africa during this period. German investments amounted to a value of USD6,233m in capex, which represented a 31.31% share of the total capex. France and Italy followed in second and third place, respectively accounting for 21.91% and 13.12% of the total capex.

Figure 7: Top 10 EU source countries for FDI in South Africa, ranked by capex, Jan 2015–Nov 2025



Source: fDi Markets, a service from The Financial Times 2026. All Rights Reserved

South Africa's renewable energy sector attracted the most capex from the EU's FDI in South Africa in Jan 2015–Nov 2025, as shown in Figure 8. These investments were valued at USD10,838m (or USD10.84bn) and amounted to a share of 54.44% of the total capex. A total of 58 projects (representing a share of 12.95% of the total number of projects) were generated. The automotive OEM sector, which attracted FDI valued at USD1,837m (or USD1.84bn) and accounted for 9.23% of the total capex, was in second place. Some 14 projects materialised from

these investments, representing a 3.13% share of the total number of projects. In third place was the business services sector which benefited from FDI valued at USD1,075m (or USD1.08bn) across 51 projects.

Figure 8: FDI from the EU in South Africa, top 15 sectors (measured in capex), Jan 2015–Nov 2025

	Capex (USDm)	Capex %	No of projects	Projects %
Renewable energy	10,838	54.44%	58	12.95%
Automotive OEM	1,837	9.23%	14	3.13%
Business services	1,075	5.4%	51	11.38%
Food and Beverages	965	4.85%	19	4.24%
Coal, oil & gas	758	3.81%	4	0.89%
Metals	595	2.99%	9	2.01%
Chemicals	460	2.31%	15	3.35%
Software & IT services	395	1.98%	48	10.71%
Communications	387	1.94%	16	3.57%
Transportation & Warehousing	362	1.82%	43	9.6%
Industrial equipment	353	1.77%	32	7.14%
Textiles	262	1.32%	33	7.37%
Financial services	237	1.19%	19	4.24%
Ceramics & glass	177	0.89%	4	0.89%
Consumer products	171	0.86%	15	3.35%

Source: fDi Markets, a service from The Financial Times 2026. All Rights Reserved

Table 5 lists the top 10 EU companies that invested in South Africa from January 2015 to November 2025, ranked according to capex. These were WKN with a capex of USD3,011.0m, followed by Enel Green Power (USD2,277.0m in capex) and Engie (GDF SUEZ) (Gaz de France) with a capex of USD1,184.0m capex.

Table 5: Top 10 EU-based companies investing in South Africa, measured in capex, Jan 2015–Nov 2025

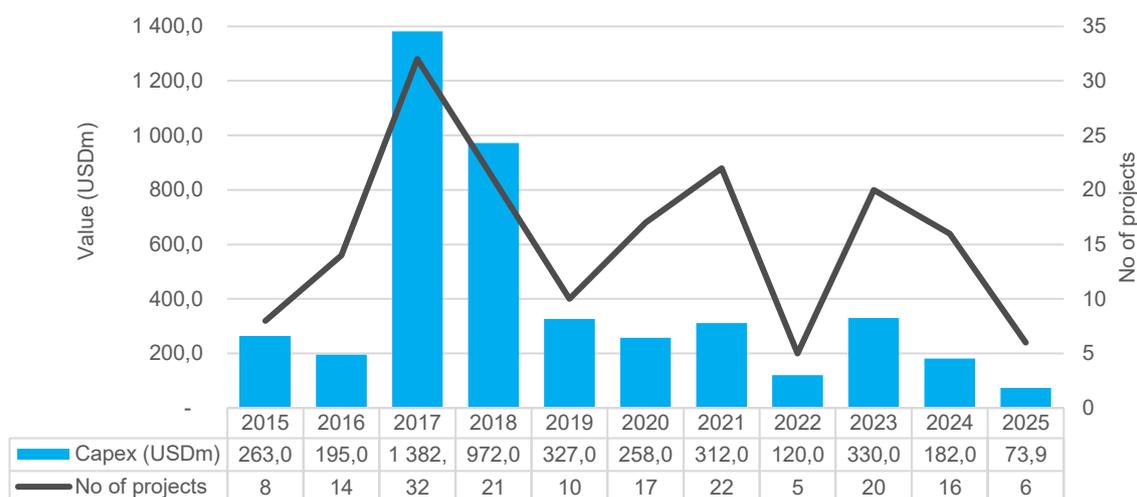
Rank	Company	Capex (USDm)	No of projects	Est. Jobs
1	WKN	3 011.0	1	1033
2	Enel Green Power	2 277.0	12	365
3	Engie (GDF SUEZ) (Gaz de France)	1 184.0	4	164
4	EDF Renewables South Africa	1 030.0	7	153
5	Mulilo	840.0	7	249
6	Mercedes-Benz South Africa	695.0	1	3000
7	Tharisa	547.0	1	816
8	Lekela Power	505.0	3	63
9	TotalEnergies (Total)	505.0	3	63
10	Lotus Bakeries	333.0	3	416
Total		19 908.0	448	39739

Source: fDi Markets, a service from The Financial Times 2026. All Rights Reserved.

3.2. Outward FDI from South Africa in the EU

Between January 2015 and November 2025, South Africa invested in 171 FDI projects in the EU. These projects had a capital expenditure of USD4.42bn and led to the creation of an estimated 16,361 jobs. This is shown in Figure 9.

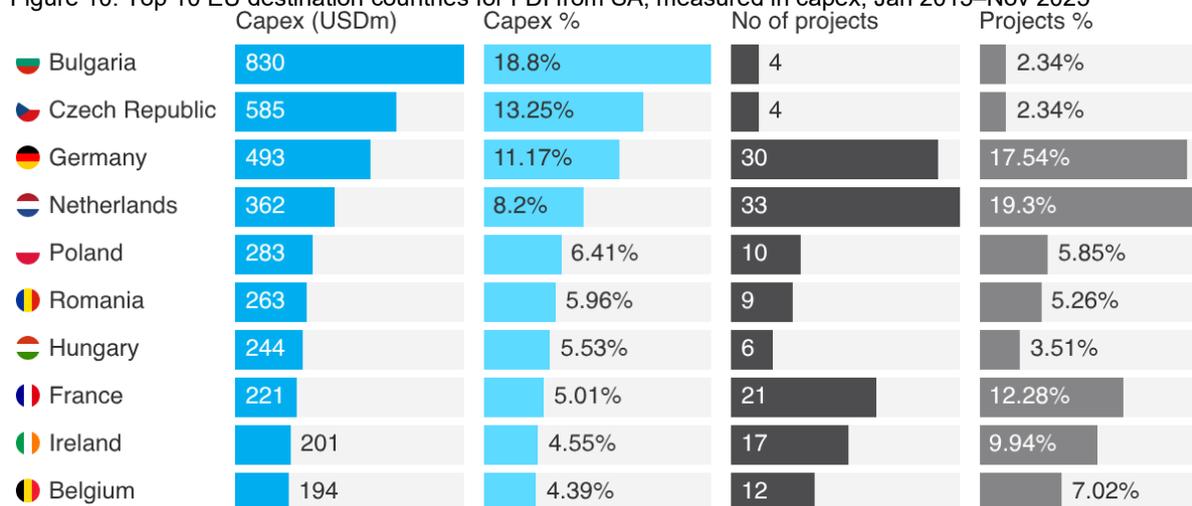
Figure 9: FDI from South Africa in the EU, Jan 2015–Nov 2025



Source: fDi Markets, a service from The Financial Times 2026. All Rights Reserved

The top EU destination markets for OFDI from South Africa between January 2015 and November 2025 are shown in Figure 10. Bulgaria was the leading destination for OFDI from the country during this period. South African investments amounted to a value of USD830m in capex, which represented a 18.80% share of the total capex from South Africa in the EU. The Czech Republic and Germany followed in second and third place, respectively accounting for 13.25% and 11.17% of the total capex.

Figure 10: Top 10 EU destination countries for FDI from SA, measured in capex, Jan 2015–Nov 2025



Source: fDi Markets, a service from The Financial Times 2026. All Rights Reserved.

Figure 11 shows that the EU's paper, printing & packaging sector was the largest recipient of OFDI from South African companies in January 2015–November 2025. South African companies invested in a total of 14 projects with a cumulative capex value of USD1.78bn (equivalent to 40.23% of FDI in the EU). In second place was the transportation & warehousing sector which benefited from 14 projects from South African investments, amounting to a capex worth USD705.00m. The consumer products sector ranked third. This sector invested a total of USD439.00m in capex in the EU, accounting for 9.94% of the total FDI from South Africa in the EU.

Figure 11: FDI from South Africa in EU, top 15 sectors (measured in capex) Jan 2015–Nov 2025

	Capex (USDm)	Capex %	No of projects	Projects %
Paper, printing & packaging	1,776	40.23%	14	8.19%
Transportation & Warehousing	705	15.97%	14	8.19%
Consumer products	439	9.94%	8	4.68%
Real estate	214	4.85%	6	3.51%
Pharmaceuticals	182	4.12%	6	3.51%
Software & IT services	163	3.69%	32	18.71%
Financial services	162	3.67%	9	5.26%
Minerals	110	2.49%	4	2.34%
Food and Beverages	104	2.36%	8	4.68%
Chemicals	101	2.29%	3	1.75%
Business services	90.7	2.05%	24	14.04%
Communications	88	1.99%	11	6.43%
Textiles	60.9	1.38%	6	3.51%
Automotive OEM	54.6	1.24%	1	0.58%
Electronic components	50.5	1.14%	3	1.75%

Source: fDi Markets, a service from The Financial Times 2026. All Rights Reserved

Listed in Table 6 are South Africa's top investing companies in the EU, ranked according to the amount of capex that was invested. Among those were Mondi Group which invested USD1.36bn (USD1,357.00m). eMag, an e-commerce subsidiary company of Naspers, invested in eight projects with a total capex value of USD444.0m.

Table 6: Top 10 South African-based companies in the EU, measured in capex, Jan 2015–Nov 2025

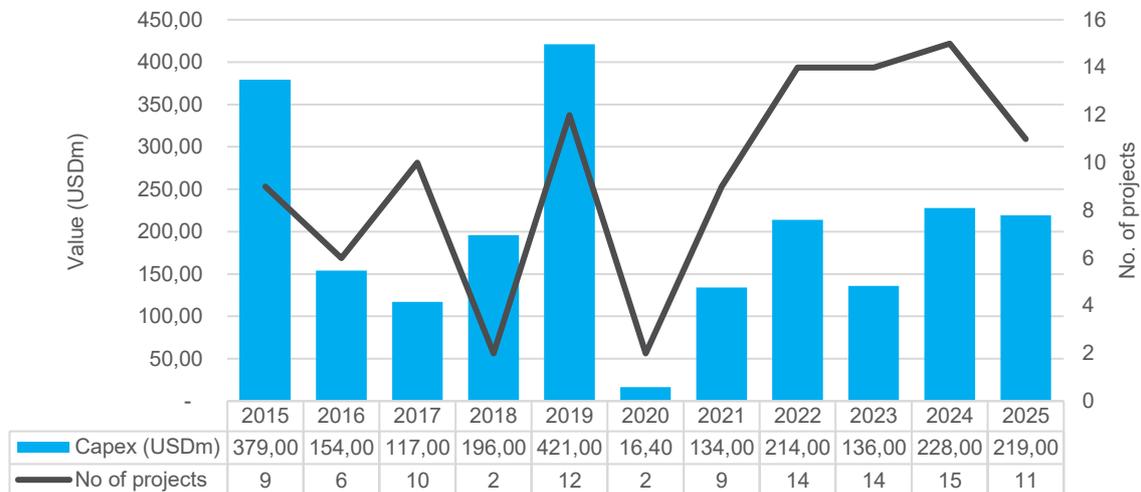
Rank	Company	Capex (USDm)	No of projects	Est. Jobs
1	Mondi Group	1 357.0	6	3 794
2	eMag	444	8	3 429
3	Sappi	411	8	512
4	Palletways	276	7	671
5	Imperial Logistics International	250	5	341
6	Global Airways (Global Aviation)	168	1	250
7	Keliber	165	5	191
8	Fortress Real Estate Investments	115	2	770
9	Aspen Pharmacare Holdings	109	3	120
10	Hystead	85.3	2	988
Total		4 415.0	171	16 361

Source: fDi Markets, a service from The Financial Times 2026. All Rights Reserved

3.3. Inward FDI from the EU in the Western Cape

During the period under review (Jan 2015 – Nov 2025), the Western Cape (WC) benefited from a total of 104 FDI projects from the EU which reached a total capex value of USD2.2bn and resulted in an estimated 8,703 jobs. This is illustrated in Figure 12.

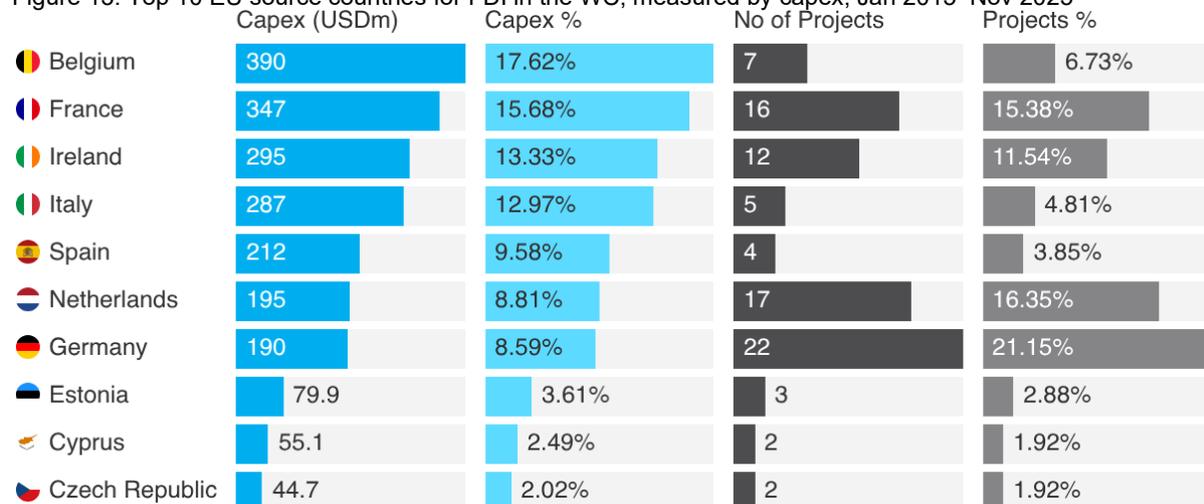
Figure 12: FDI from the EU into the Western Cape, Jan 2015–Nov 2025



Source: fDi Markets, a service from The Financial Times 2026. All Rights Reserved

Among the EU members, Belgium was the leading source market for FDI in the Western Cape during the period under review, as shown in Figure 13. Belgian investments amounted to a value of USD390.00m in capex which represented a 17.62% share of total capex. France and Ireland followed in second and third place, respectively accounting for 15.68% and 13.33% of the total capex.

Figure 13: Top 10 EU source countries for FDI in the WC, measured by capex, Jan 2015–Nov 2025



Source: fDi Markets, a service from The Financial Times 2026. All Rights Reserved.

EU-based companies invested in nine FDI projects in the renewable energy sector in the Western Cape from January 2015 to November 2025. This amounted to a capex value of USD689.0m, equivalent to a 31.13% share of the total capex. The business services sector ranked second, attracting EU investments worth USD487.0m which was equivalent to a 22.01% share of the total capex. A share of 15.82% (or USD350.0m of total capex) was invested in the food and beverages sector. These details are shown in Figure 14.

Figure 14: FDI from EU into the Western Cape, top 15 sectors (measured in capex), Jan 2015–Nov 2025

	Capex (USDm)	Capex %	No of projects	Projects %
Renewable energy	689	31.13%	9	8.65%
Business services	487	22.01%	24	23.08%
Food & Beverages	350	15.82%	6	5.77%
Financial services	148	6.69%	8	7.69%
Software & IT services	138	6.24%	18	17.31%
Paper, printing & packaging	77.5	3.5%	1	0.96%
Textiles	53.2	2.4%	4	3.85%
Transportation & Warehousing	44.9	2.03%	7	6.73%
Biotechnology	36.5	1.65%	1	0.96%
Aerospace	35.8	1.62%	2	1.92%
Electronic components	26.5	1.2%	3	2.88%
Consumer products	25.1	1.13%	3	2.88%
Communications	23.5	1.06%	5	4.81%
Industrial equipment	21.4	0.97%	3	2.88%
Real estate	16.5	0.75%	1	0.96%
Business machines & equipment	11.2	0.51%	1	0.96%

Source: fDi Markets, a service from The Financial Times 2026. All Rights Reserved

Lotus Bakeries, a Belgian company, invested in three manufacturing projects in the Western Cape's food and beverages sector, at a cumulative capex value of USD333.00m. Acciona, a company that develops and manages sustainable infrastructure solutions, and which is based in Spain, invested USD168.0m in capex in the Western Cape's Gouda Farm project in 2015. Mainstream Renewable Power invested USD168.0m in the Perdekraal East Wind Farm in 2018, thereby creating 21 jobs. Enel Green Power and TerniEnergia invested USD168.0m and USD98.50m respectively in the Paleisheuvel photovoltaic plant in the Western Cape. These details can be seen in Table 7.

Table 7: Top 10 EU companies that invested in the Western Cape, measured in capex, Jan 2015–Nov 2025

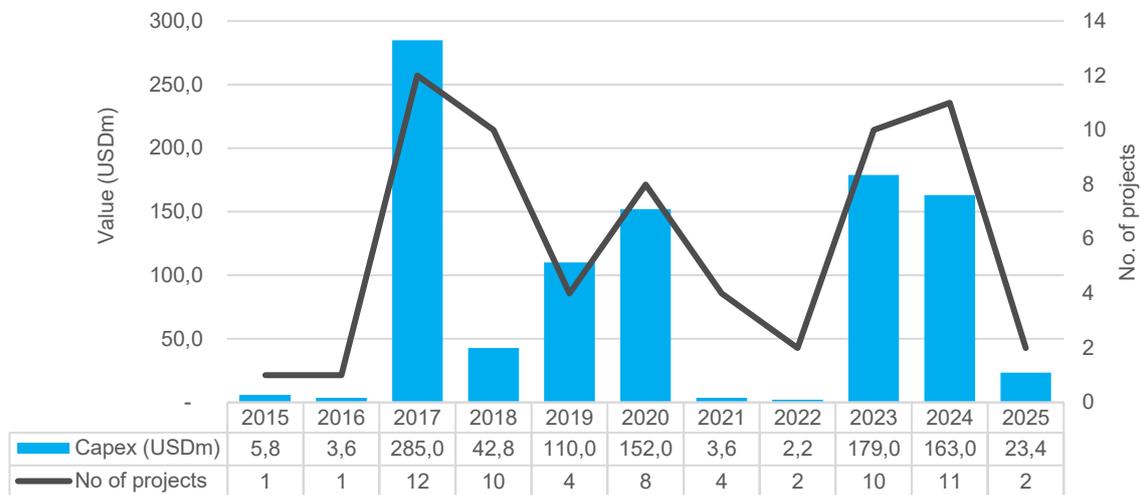
Rank	Company	Capex (USDm)	No of projects	Est. Jobs
1	Lotus Bakeries	333	3	416
2	Acciona	168	1	21
3	Mainstream Renewable Power	168	1	21
4	Enel Green Power	168	1	21
5	TerniEnergia	98.5	1	19
6	ARMOR_IIMAK (International Imaging Materials)	77.5	1	177
7	Exness	55.1	2	118
8	Admirals	45.6	1	91
9	PFNonwovens	40	1	40
10	Sanofi Genzyme	36.5	1	53
Total		2 213.00	95	7 897

Source: fDi Markets, a service from The Financial Times 2026. All Rights Reserved

3.4. Outward FDI from the Western Cape in the EU

Between January 2015 and November 2025, the Western Cape invested in a total of 65 FDI projects in the EU which were worth a capex value of USD971.0m, leading to the creation of an estimated 5,992 jobs. This is shown in Figure 15.

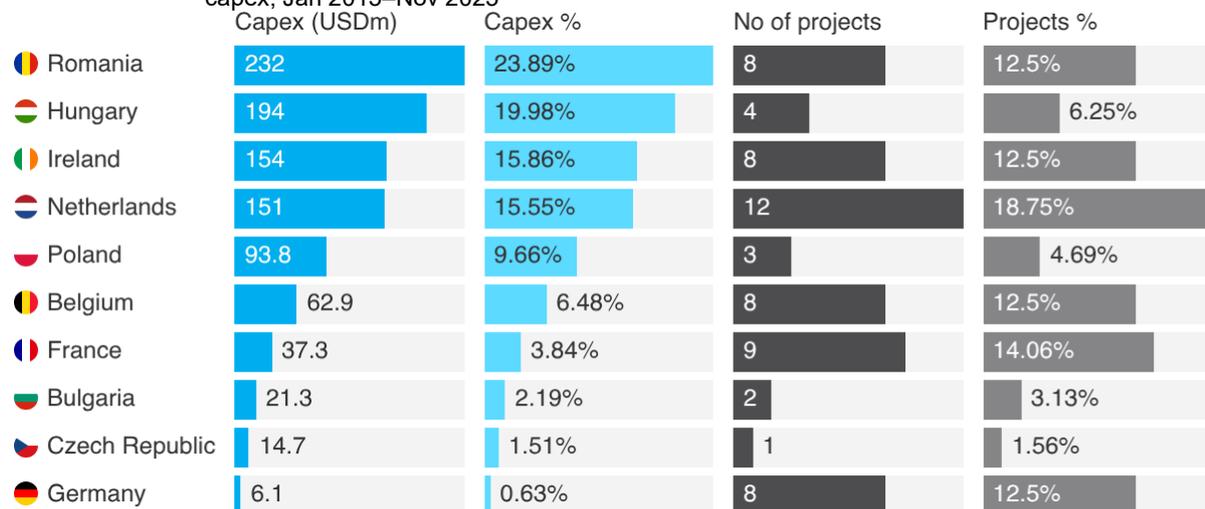
Figure 15: FDI from the Western Cape in the EU, Jan 2015–Nov 2025



Source: fDi Markets, a service from The Financial Times 2026. All Rights Reserved

The top EU destination markets for FDI from the Western Cape between January 2015 and November 2025 are shown in Figure 16. Romania was the leading destination for FDI from the province during this period. Western Cape investments in Romania amounted to a value of USD232m in capex, which represented a 23.89% share of the total capex from the Western Cape in the EU. Hungary and Ireland followed in second and third place, respectively accounting for 19.98% and 15.86% of the total capex.

Figure 16: Top 10 EU countries for FDI from the Western Cape, measured by capex, Jan 2015–Nov 2025



Source: fDi Markets, a service from The Financial Times 2026. All Rights Reserved

Figure 17 shows that the EU's consumer products sector was the largest recipient of FDI from the Western Cape. This sector accounted for 44.49% of the total FDI in capex (USD432.0m). The financial services sector ranked second, with FDI investments from the Western Cape amounting to a capex value of USD132.0m, representing a 13.59% share of the total capex. The software & IT services sector in the EU was third, having benefited from investments worth USD88.0m.

Figure 17: FDI from the Western Cape in EU, top 15 sectors (measured in capex), Jan 2015–Nov 2025

	Capex (USDm)	Capex %	No of projects	Projects %
Consumer products	432	44.49%	5	7.81%
Financial services	132	13.59%	5	7.81%
Software & IT services	88.8	9.15%	16	25%
Pharmaceuticals	73	7.52%	3	4.69%
Textiles	60.9	6.27%	6	9.38%
Automotive OEM	54.6	5.62%	1	1.56%
Communications	32.5	3.35%	5	7.81%
Transportation & Warehousing	26.6	2.74%	2	3.13%
Space & defence	22.3	2.3%	5	7.81%
Electronic components	19	1.96%	2	3.13%
Business services	10.9	1.12%	7	10.94%
Biotechnology	7.1	0.73%	1	1.56%
Consumer electronics	5.8	0.6%	2	3.13%
Food and Beverages	2.6	0.27%	1	1.56%
Industrial equipment	1.4	0.14%	2	3.13%

Source: fDi Markets, a service from The Financial Times 2026. All Rights Reserved.

The leading Western Cape company that invested in the EU in 2015–Nov 2025 was eMag, as shown in Table 8. The e-commerce retailer injected USD444.00m in eight projects in the EU. Van Hool invested USD54.6m in a single project and Prosus invested USD51.3m, also in one project.

Table 8: Top 10 Western Cape companies that invested in the EU, measured in capex, Jan 2015– Nov 2025

Rank	Company	Capex (USDm)	No of projects	Est. Jobs
1	eMag	444.0	8	3429
2	Van Hool	54.6	1	150
3	Prosus	51.3	1	46
4	OUTsurance Ireland	49.9	1	228
5	Synexa Life Sciences	35.0	2	83
6	Phase Eight (Fashion & Designs)	32.9	3	345
7	TASK	31.9	1	57
8	OLX	29.8	3	222
9	Sameday Courier	26.6	2	29
10	Triggerfish Animation Studios	20.2	1	60
Total		971.0	64	5967

Source: fDi Markets, a service from The Financial Times 2026. All Rights Reserved.

4. Tourism

This section provides an overview of the tourism trends related to the twenty-seven member states of the European Union (EU). The analyses is three-fold:

Overview of air outbound trends. This section examines the air outbound trends from the twenty-seven EU countries from the year 2024, projections for 2025, and forecasts extending to the year 2030. This section also provides the leisure and business air outbound departures for twenty EU countries. The data is derived from Euromonitor International (2025). Including the overview of tourism trends in South Africa and in the Western Cape.

4.1 Outbound air departures: trends

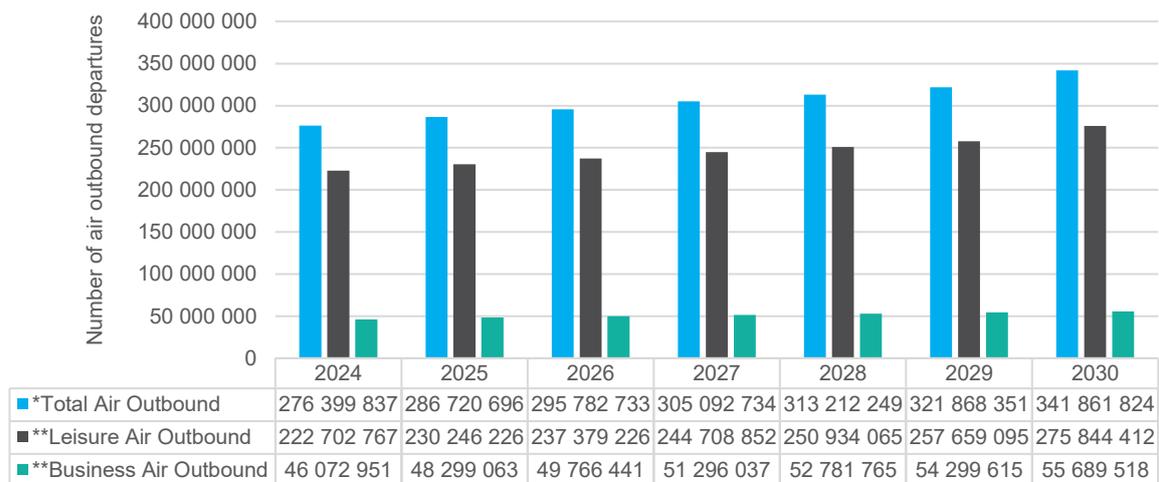
Outbound air departures from 27 EU countries:

In 2024, the total number of outbound air departures from 27 EU countries reached 276 million, marking a y-o-y increase of 7.79% compared to 2023. Looking ahead, outbound air departures are projected to rise steadily to 287 million in 2025 to reach 342 million by 2030. This can be seen in Figure 18.

Leisure and business outbound air departures from 20 EU countries

Leisure travel remains the primary driver of outbound air departures from the 27 EU countries and are estimated to reach 230 million in 2025 and 276 million by 2030. Meanwhile, business outbound departures are estimated to reach 48 million in 2025 and 56 million by 2030, as shown in Figure 18.

Figure 18: Total outbound air departures from 27 EU countries



Source: Euromonitor International (2025)

Note: All figures shown for 2025 are estimates (E) and forecast projections (F) for the years 2026 to 2030.

Outbound air includes outbound trips by residents taken on scheduled airlines, charter or low-cost carriers for business and leisure purposes

*All figures shown for total outbound air departures are for 27 EU countries.

**All figures shown for leisure and business air departures are for 20 EU countries.

4.2 Tourism trends between South Africa and the EU

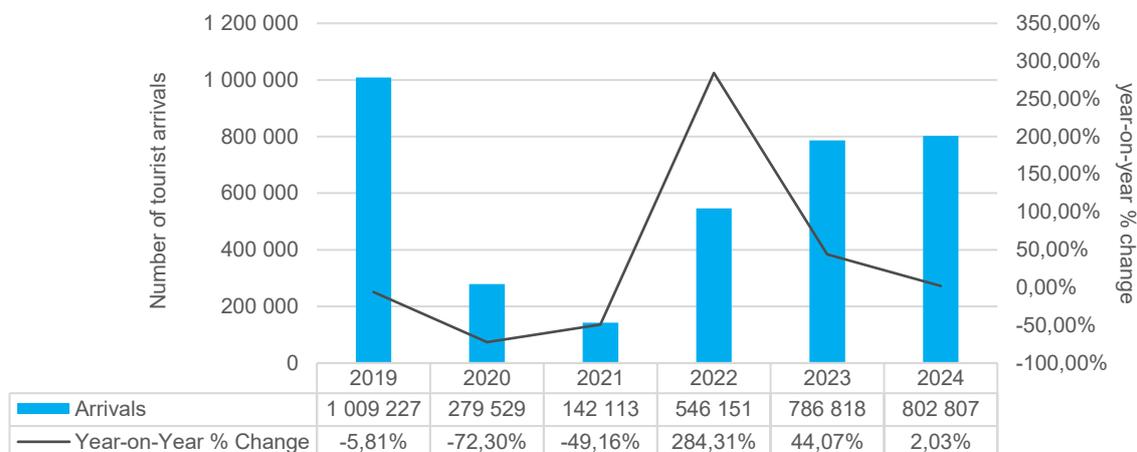
This section examines the dynamic tourism flows from 27 EU countries in 2019–2024, derived from the SA Tourism dashboard. In addition, due to the limited data available, it highlights the total foreign direct spend and length of stay by tourists in South Africa from 12 of the 27 EU countries in 2019–2024. The data comes from SA Tourism Departure Survey (2025).

4.2.1 Tourist arrivals in South Africa from 27 EU countries

In 2024, South Africa welcomed a total of 802,807 visitors from 27 EU countries, as illustrated in Figure 19. This represents a 2.03% increase in relation to the 786,818 arrivals recorded in 2023, and a 46.99% increase compared to 2022. The leading three source markets among the 27 EU countries that contributed to the influx in

2024 were Germany, with 254,992 tourists, followed by the Netherlands with 132,422 tourists, and France with 125,823 tourists visiting the country in 2024.

Figure 19: Tourist arrivals in South Africa, originating from 27 EU countries



Source: SA Tourism (2025)

*Note: Information about tourist arrivals in South Africa from 27 EU countries was derived from the SA Tourism dashboard.

4.2.2 Total foreign direct spend in South Africa by tourists from 12 of the 27 EU countries

In 2024, tourist arrivals from 12 of the 27 EU countries contributed ZAR16.00 billion in total foreign direct spend to South Africa's economy. Germany, the Netherlands and France were the leading source markets. These countries contributed a combined total of ZAR49.71 billion during the six consecutive years, and a combined total contribution of ZAR10.72 billion in 2024. This can be seen in Table 9.

Table 9: Total foreign direct spend in South Africa by visitors from 12 of the 27 EU countries, 2019–2024

Rank	Markets	2019	2020	2021	2022	2023	2024	YOY % Change
1	Germany	R6.59bn	R1.97bn	R1.35 bn	R4.37bn	R6.33bn	R5.41 bn	-14.48%
2	Netherlands	R3.09bn	R782.41m	R618.83m	R2.15bn	R3.10bn	R2.85 bn	-7.92%
3	France	R2.70bn	R660.86m	R531.60m	R1.78bn	R2.96bn	R2.45 bn	-17.19%
4	Italy	R1.11 bn	R161.95m	R168.89m	R664.95m	R1.12bn	R974.25m	-13.35%
5	Belgium	R923.35m	R256.05m	R241.49m	R749.34m	R967.68m	R813.40m	-15.94%
6	Ireland	R637.20m	R167.94m	R101.52m	R483.32m	R656.26m	R783.38m	19.37%
7	Spain	R708.55m	R100.51m	R130.79m	R492.80m	R770.65m	R660.44m	-14.30%
8	Denmark	R494.44m	R162.61m	R110.43m	R412.26m	R559.63m	R541.89m	-3.17%
9	Austria	R738.60m	R142.63m	R120.14m	R371.41m	R629.71m	R535.49m	-14.96%
10	Sweden	R871.94m	R250.75m	R150.22m	388.52m	R584.92m	R485.03m	-17.08%
11	Portugal	R352.29m	R79.25m	R77.71m	R238.61m	R404.71m	R322.38m	-20.34%
12	Finland	R184.59m	R75.91m	R26.01m	R139.14m	R207.06m	R168.47m	-18.64%
Total TFDS		R18.41bn	R4.81bn	3.63bn	12.25bn	18.29bn	16.00bn	-12.52%

Source: SA Tourism (2025)

Note: No data was available for the remaining 15 EU member countries

TFDS – Total Foreign Direct Spend. R/ZAR represent the Rand.

4.2.3 Average length of stay in South Africa by visitors from 12 of the 27 EU countries

In 2024, tourists from 12 of the 27 EU countries stayed for an average of 15.1 nights in South Africa, reflecting a – 3.81% decrease compared to the average of 15.7 nights in 2023. Looking at the y-o-y growth, Table 10 shows an increase in the average number of nights spent in the country by tourists from Spain (a 17.70% increase), Ireland (9.60%), Italy (6.70%) and Austria (1.30%) in 2024.

Table 10: Average length of stay in South Africa by visitors from 12 of the 27 EU countries, 2019–2024

Rank	Markets	2019	2020	2021	2022	2023	2024	YOY % Change
1	Ireland	16.1	17.1	21.7	16.0	15.9	17.5	9.60%
2	Spain	13.6	15.5	19.6	17.7	14.1	16.5	17.70%
3	Austria	18.0	16.2	19.9	19.9	16.1	16.3	1.30%
4	Belgium	21.5	22.1	18.6	19.5	16.5	16.2	-2.10%
5	Denmark	15.0	18.3	17.3	17.9	16.0	15.7	-2.20%
6	Sweden	19.8	15.9	23.1	18.1	15.8	15.5	-2.00%
7	Netherlands	18.2	19.2	20.1	19.9	16.3	15.4	-5.50%
8	Germany	19.0	20.7	19.1	18.8	16.8	15.2	-9.40%
9	France	17.6	19.5	20.5	19.8	16.8	15.1	-10.20%
10	Italy	15.1	15.7	20.7	17.8	13.4	14.3	6.70%
11	Portugal	18.7	17.3	16.7	18.9	14.7	12.3	-16.30%
12	Finland	13.0	16.2	12.5	21.6	16.4	11.6	-29.30%
Average LOS		17.7	17.8	19.2	18.8	15.7	15.1	-3.81%

Source: SA Tourism (2025)

Note: No data were available for the remaining 15 EU member countries

LOS – Length of Stay

4.3 Tourism trends between the Western Cape and EU

This section examines the dynamic tourism flows from 12 of the 27 EU countries in 2019–2024. In addition, it highlights the total foreign direct spend and length of stay by EU tourists in the Western Cape for the period 2019–2024. The data is derived from SA Tourism Departure Survey (2025).

4.3.1 Tourist arrivals in the Western Cape from 12 of the 27 EU countries

Table 11 shows that in 2024, a total of 420,937 tourists from 12 of the 27 EU countries visited the Western Cape. This represents a 1.11% increase compared to 416,335 arrivals recorded in 2023 and a rise of 47.58% compared to 2022.

Germany has consistently emerged as the primary source market contributing to the influx of tourist arrivals in the Western Cape for six consecutive years (2019–2024). In this time frame, France and the Netherlands were the second- and third-largest source markets for tourists visiting the province. Specifically, France maintained its status as the second-largest source of tourists in the years 2019, 2020, and 2024, while it occupied the third position from 2021 to 2023. The Netherlands claimed the second position during the years 2021, 2022, and 2023 and ranked in the third position in 2019, 2020, and 2024. Overall, these three countries played a significant role in boosting and sustaining the influx of tourists to the province. This can be seen in Table 11.

Table 11: Tourist arrivals in the Western Cape from 12 of the 27 EU countries, 2019–2024

Rank	Markets	2019	2020	2021	2022	2023	2024	YOY % Change
1	Germany	232 353	66 431	32 166	101 197	142 729	145 329	1.82%
2	France	108 485	24 154	13 409	42 611	66 723	69 715	4.48%
3	Netherlands	90 431	19 011	13 934	48 572	68 326	68 716	0.57%
4	Italy	46 784	6 222	4 342	18 366	32 795	31 610	-3.61%
5	Belgium	34 602	7 136	5 018	18 674	23 905	22 980	-3.87%
6	Ireland	22 384	5 225	2 358	11 277	15 139	17 423	15.09%
7	Spain	27 373	3 358	3 344	12 415	19 129	17 010	-11.08%
8	Sweden	27 522	8 248	3 677	9 566	14 600	15 186	4.01%
9	Austria	20 873	6 024	2 675	7 905	12 728	12 790	0.49%
10	Denmark	14 718	3 659	1 855	6 313	8 896	9 113	2.44%
11	Portugal	14 235	2 551	2 180	5 488	7 048	7 059	0.16%
12	Finland	6 143	2 011	776	2 844	4 317	4 006	-7.20%
Total tourist arrivals		645 903	154 030	85 734	285 228	416 335	420 937	1.11%

Source: SA Tourism (2025)

Note: No data were available for the remaining 15 EU member countries.

4.3.2 Total foreign direct spend in the Western Cape by tourists from 12 of the 27 EU countries

In 2024, tourist arrivals from 12 of the 27 EU countries contributed ZAR7.45 billion in foreign direct spend to the Western Cape's economy. Germany, the Netherlands, and France consecutively ranked as the leading source markets contributing a combined total of ZAR14.76 billion in foreign direct spend over the three years, and a combined total contribution of ZAR5.07 billion in 2024.

Notably, when observing the y-o-y growth in 2024, tourist arrivals from Ireland contributed to an increase of 24.48% in total foreign direct spend y-o-y. This marked the only increase among the 12 EU countries analysed with respect to total foreign direct spend. The trend is illustrated in Table 12.

Table 12: Total foreign direct spend in the Western Cape by tourists from 12 of the 27 EU countries, 2022–2024

Rank	Markets	2022	2023	2024	YOY % Change
1	Germany	R2.06 bn	R2.97 bn	R2.54 bn	-14.47%
2	Netherlands	R1.02 bn	R1.38 bn	R1.30 bn	-5.86%
3	France	R898.32 m	R1.35 bn	R1.23 bn	-8.81%
4	Italy	R346.85 m	R558.04 m	R475.56 m	-14.78%
5	Belgium	R352.92 m	R457.76 m	R357.48 m	-21.91%
6	Spain	R206.63 m	R332.90 m	R271.52 m	-18.44%
7	Ireland	R213.69 m	R317.78 m	R395.57 m	24.48%
8	Sweden	R161.23 m	R262.77 m	R250.41 m	-4.70%
9	Austria	R178.54 m	R266.95 m	R255.45 m	-4.31%
10	Denmark	R139.32 m	R176.73 m	R124.81 m	-29.38%
11	Finland	R76.11 m	R99.83 m	R91.84 m	-8.00%
12	Portugal	R107.60 m	R186.97 m	R149.85 m	-19.85%
Total TFDS		5.76 bn	8.36 bn	7.45 bn	-10.96%

Source: SA Tourism (2025)

Note: No data was available for the remaining 15 EU member countries.

*Data not available for the period 2019–2021.

TFDS – Total Foreign Direct Spend. R/ZAR represent the Rand

4.3.3 Average length of stay (nights) in the Western Cape by tourists from 12 of the 27 EU countries

In 2024, tourists from 12 of the 27 EU countries stayed for an average of 11.2 nights in the Western Cape, reflecting an 8.98% decrease compared to the average of 12.3 nights in 2023. An analysis of the y-o-y growth between 2023 and 2024 revealed an increase in the average length of stay among the following three key source markets: Spain, Ireland, and Italy. The average nights spent in the province increased by 14.75% for Spanish tourists, 11.28% for Irish tourists and 5.32% for Italian tourists. This can be seen in Table 13.

This upward trend in the average length of stay for tourists from these three countries correlates with the broader trend for the average length of stay observed in South Africa (refer to Table 13).

Table 13: Average length of stay in the Western Cape by tourists from 12 of the 27 EU countries

Rank	Markets	2019	2020	2021	2022	2023	2024	YOY % Change
1	Ireland	13.1	13.1	16.2	13.4	11.4	12.7	11.28%
2	Spain	9.8	11.1	11.5	12.9	10.4	12.0	14.75%
3	France	12.6	14.5	15.1	16.3	12.3	11.8	-3.95%
4	Portugal	14.3	12.0	14.4	17.4	13.0	11.8	-9.59%
5	Austria	15.4	13.1	15.7	17.1	12.9	11.5	-10.86%
6	Netherlands	13.8	15.1	16.5	16.2	12.4	11.3	-8.75%
7	Belgium	14.8	18.4	14.0	15.1	14.5	11.4	-21.12%
8	Germany	14.3	15.8	15.4	15.1	12.9	11.4	-11.77%
9	Sweden	14.7	12.8	20.1	15.5	12.7	11.2	-11.41%
10	Denmark	13.2	17.0	14.6	17.1	11.8	10.2	-14.07%
11	Italy	11.6	13.1	14.4	16.1	9.3	9.8	5.32%
12	Finland	10.8	11.8	10.3	21.5	14.1	9.4	-33.15%
	Average LOS	13.2	14.0	14.9	16.1	12.3	11.2	-8.98%

Source: SA Tourism (2025)

Note: No data were available for the remaining 15 EU member countries

LOS – Length of Stay

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