

# GLOBAL FOREIGN DIRECT INVESTMENT FLOW ANALYSIS IN MANUFACTURING SECTOR

# KEY INFORMATION

- **DATA USED** – FDi Markets

It is a private database which is part of Financial Times Ltd. It tracks mainly green-field foreign direct investment projects since 2003 from media sources, industry organizations and investment agencies, as well as information from market research and publication companies.

- **SUB-SECTORS CHOSEN** – 61 sub-sectors out of 216 was chosen as a result of identifying Top20 (years 2003 – 2018) of each category:

- Top20 for CAPEX investment globally, Europe, CEE, Lithuania
- Top20 for FTE globally, Europe, CEE, Lithuania
- Top20 for number of projects globally, Europe, CEE, Lithuania

- **KEY GRAPHS ABOUT SUB-SEKTORS** – all the information in the graphs below include green-field and brown-field projects

- **DEFINITIONS:**

- Europe – geographical region (not European Union) except for Russia
- Destination country – where investments are landing
- Green-field investment – when parent company creates subsidiary in a different country, building its operations and facilities from the ground up.

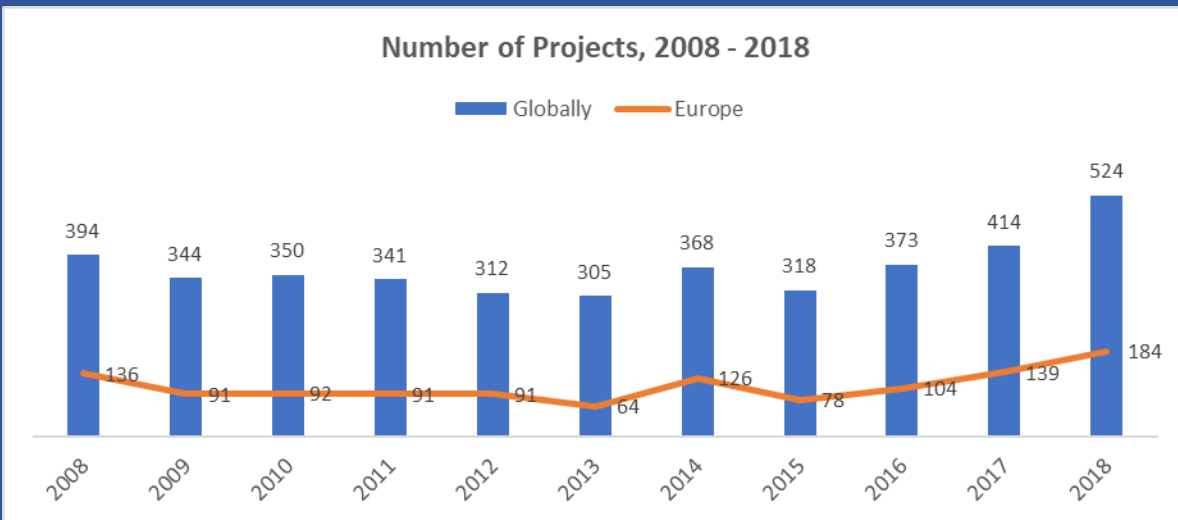
# FOOD & BEVERAGES

## In the last 10 years (2008 – 2018):

- Number of projects globally: 4 043
- Number of projects in Europe: 1 196
- 30% of all investment projects in this sector happened in Europe\*

## In the last 4 years (2014 – 2018):

- Most popular sector to invest – 13,2% of all investment projects



## Top10 destination\*\* countries globally

- United States (416)
- China (387)
- Russia (361)
- United Kingdom (259)
- India (216)
- France (204)
- Vietnam (195)
- Brazil (177)
- Spain (144)
- Poland (136)

## Top10 destination countries, Europe

- United Kingdom (259)
- France (204)
- Spain (144)
- Poland (136)
- Germany (131)
- Romania (118)
- Belgium (73)
- Ukraine (72)
- Serbia (70)
- Hungary (67)

## Top10 investing\*\* countries globally

- United States (1045)
- Switzerland (433)
- Japan (367)
- United Kingdom (338)
- France (297)
- Netherlands (287)
- Germany (239)
- Spain (155)
- Denmark (149)
- Italy (133)

## Top10 investing countries, Europe

- Switzerland (433)
- United Kingdom (338)
- France (297)
- Netherlands (287)
- Germany (239)
- Spain (155)
- Denmark (149)
- Italy (133)
- Belgium (108)
- Ireland (60)

\*In total, globally and in all sectors, between 2008 and 2018, 28% of all investment projects happened in Europe

\*\* Based on number of investment projects in the sector

## SUB-SECTOR: DAIRY PRODUCTS

» 1,3% of all project globally, 2014 - 2018

## Sector: food & beverages

» 13,2% of all projects globally, 2014 – 2018

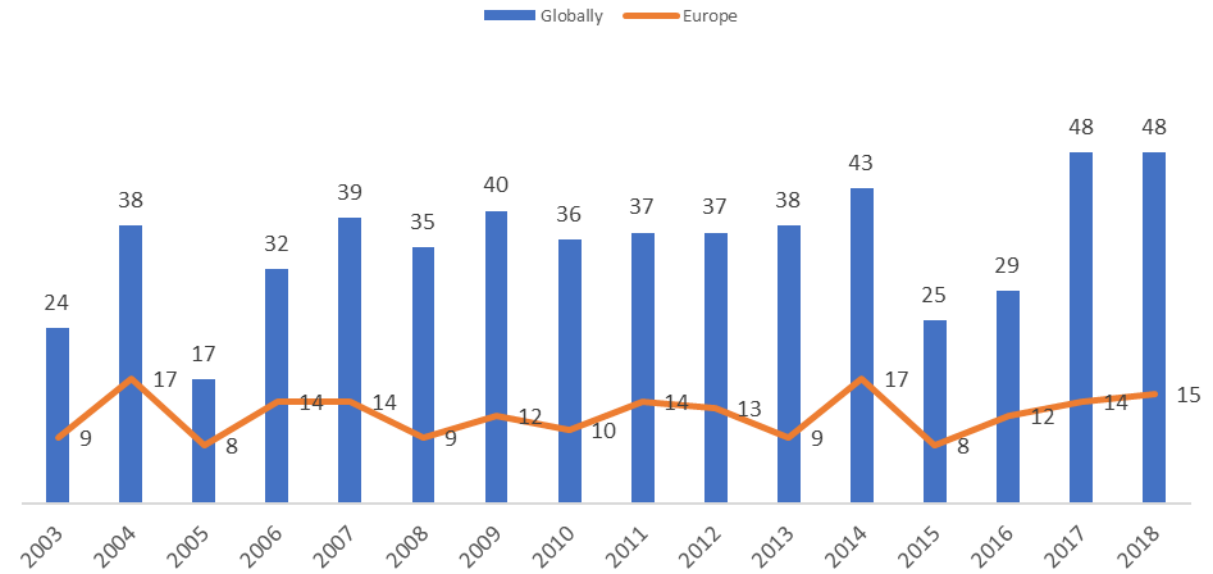
## Clusters: agribusiness

Number of projects in Lithuania: 0

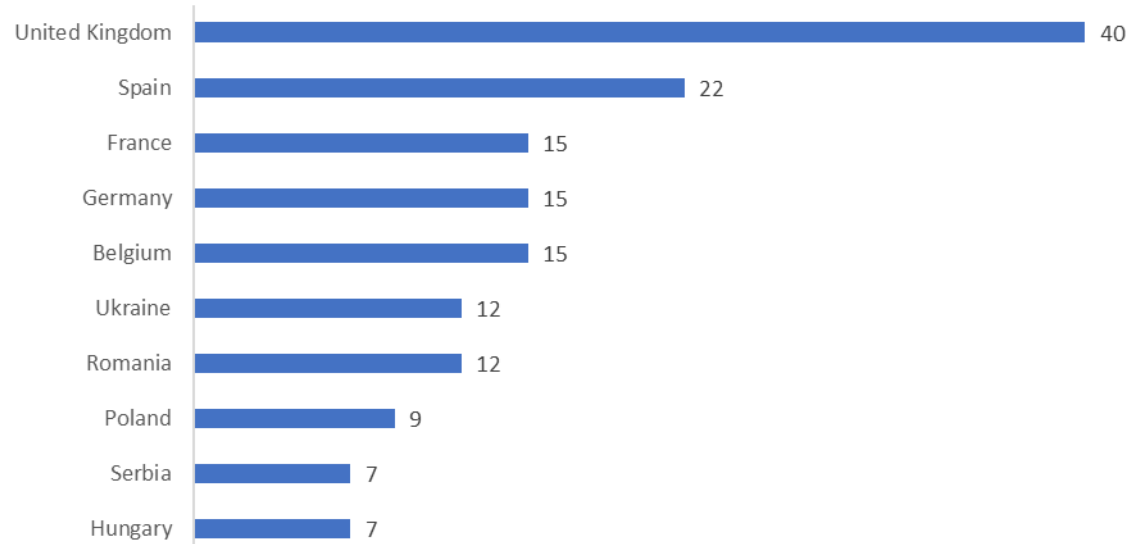
Share of green-field projects: 51%

Percentage of investment projects in Europe (2014 – 2018): 34%

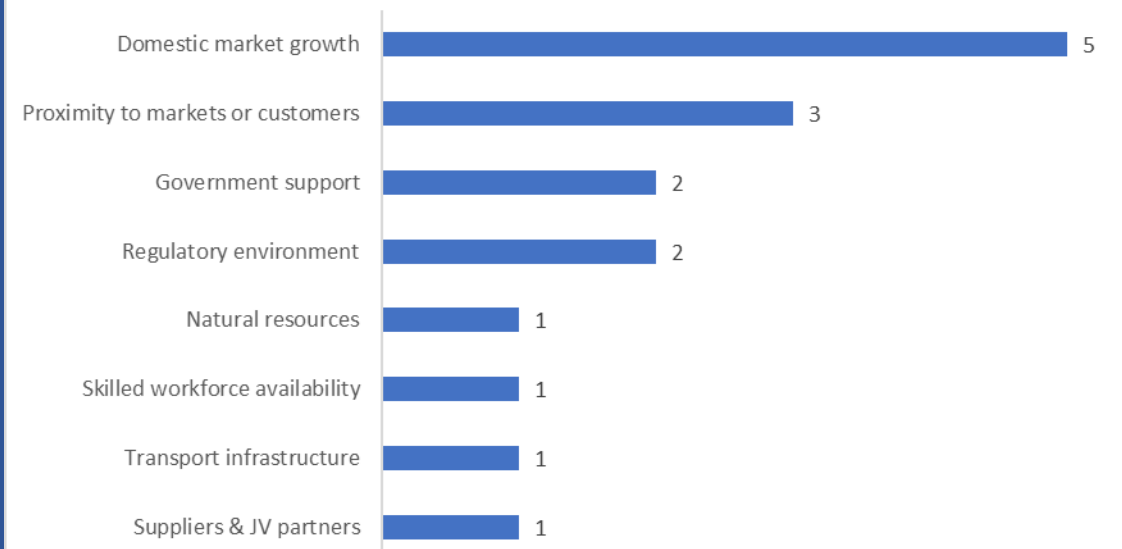
## Number of Projects, 2003 - 2018



## Top 10 Destination Countries in Europe, 2003 - 2018



## Motives & Determinants, Europe 2003 - 2018



## SUB-SECTOR: SUGAR & CONFECTIONARY

» 1,2% of all project globally, 2014 - 2018

**Sector:** food & beverages

» 13,2% of all projects globally, 2014 - 2018

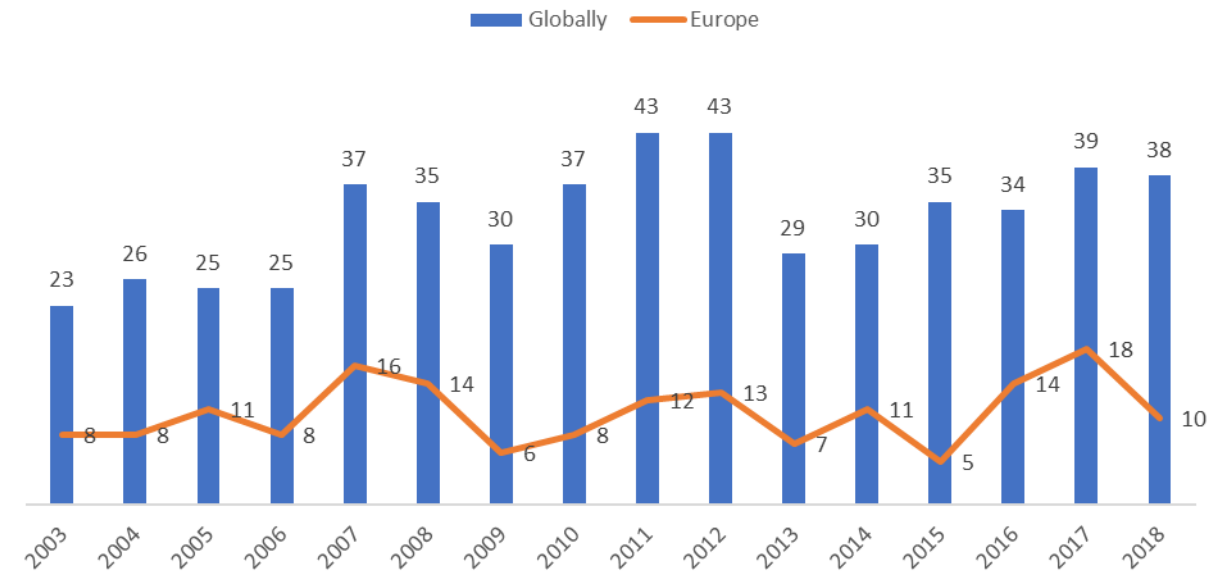
**Clusters:** agribusiness; environmental technology

**Number of projects in Lithuania:** 4 (2015; 2017(2); 2018)

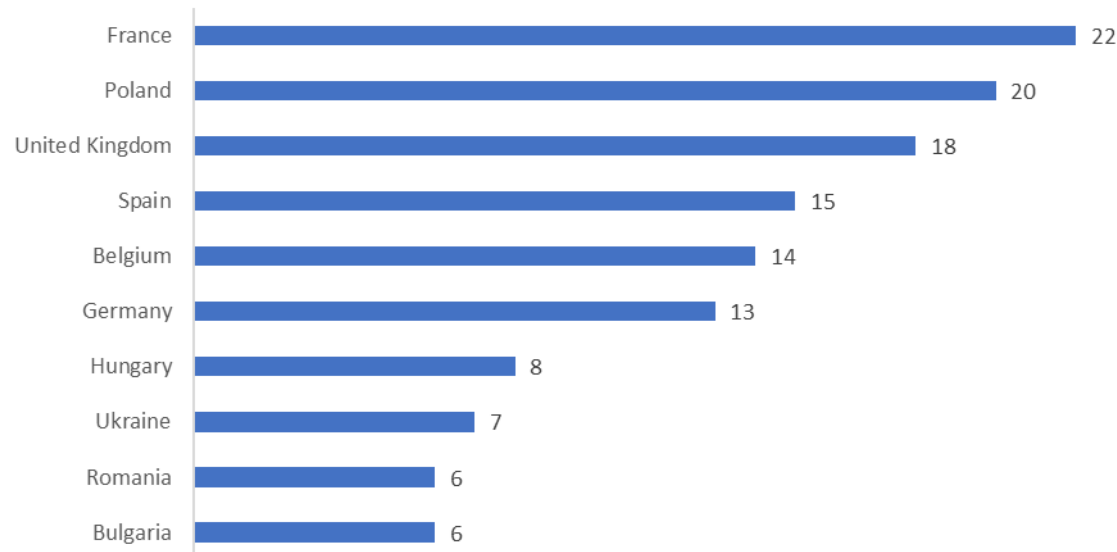
**Share of green-field projects:** 49%

**Percentage of investment projects in Europe (2014 – 2018):** 33%

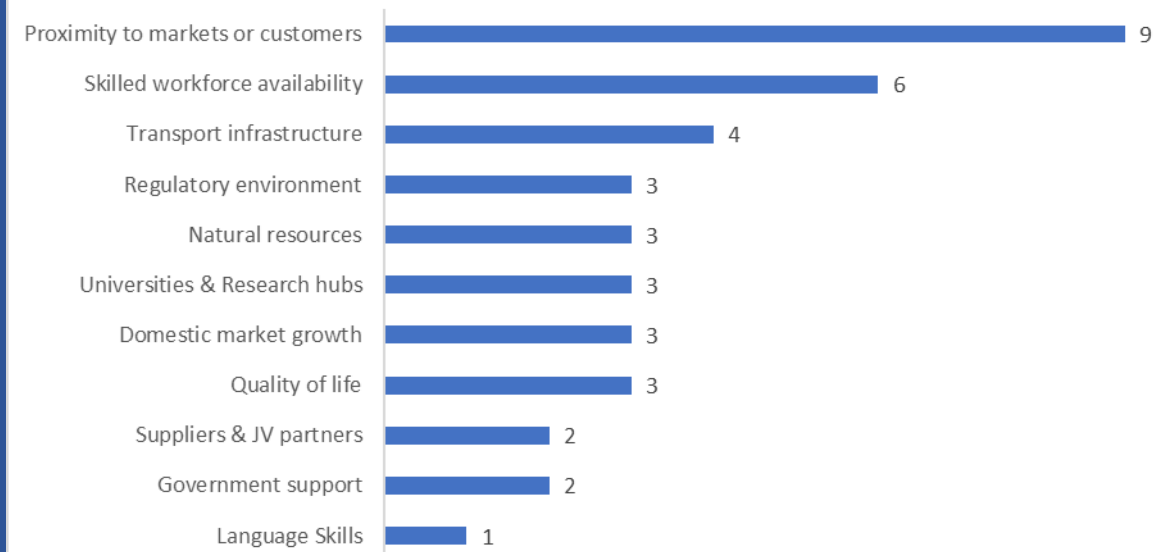
### Number of Projects, 2003 - 2018



### Top 10 Destination Countries in Europe, 2003 - 2018



### Motives & Determinants, Europe 2003 - 2018



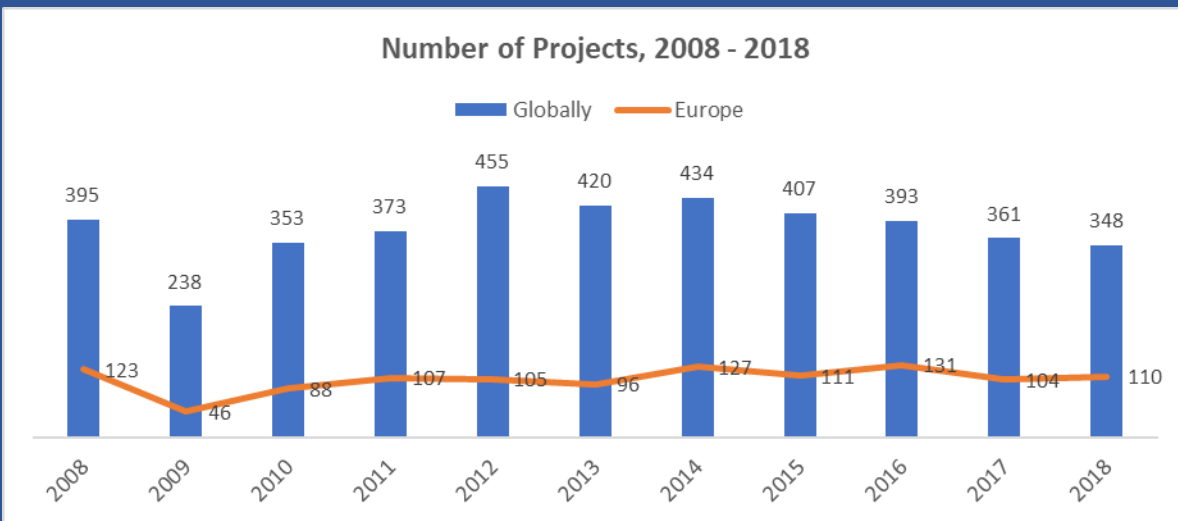
# AUTOMOTIVE COMPONENTS

## In the last 10 years (2008 – 2018):

- Number of projects globally: 4 177
- Number of projects in Europe: 1 148
- 27% of all investment projects in this sector happened in Europe\*

## In the last 4 years (2014 – 2018):

- Second most popular sector to invest – 12,8% of all investment projects



## Top10 destination\*\* countries globally

- United States (964)
- China (862)
- Mexico (632)
- India (375)
- Poland (266)
- Czech Republic (226)
- Hungary (212)
- Thailand (194)
- Romania (183)
- Russia (157)

## Top10 destination countries, Europe

- Poland (266)
- Czech Republic (226)
- Hungary (212)
- Romania (183)
- United Kingdom (154)
- France (128)
- Slovakia (127)
- Germany (111)
- Spain (90)
- Serbia (83)

## Top10 investing\*\* countries globally

- Japan (1470)
- Germany (1368)
- United States (826)
- France (349)
- South Korea (234)
- Canada (213)
- Italy (190)
- United Kingdom (181)
- Spain (161)
- Sweden (111)

## Top10 investing countries, Europe

- Germany (1368)
- France (349)
- Italy (190)
- United Kingdom (181)
- Spain (161)
- Sweden (111)
- Austria (87)
- Switzerland (58)
- Belgium (44)
- Netherlands (26)

\*In total, globally and in all sectors, between 2008 and 2018, 28% of all investment projects happened in Europe

\*\* Based on number of investment projects in the sector

## SUB-SECTOR: OTHER MOTOR VEHICLE PARTS

» 4,2% of all project globally, 2014 - 2018

**Sector:** automotive components

» 12,8% of all projects globally, 2014 – 2018

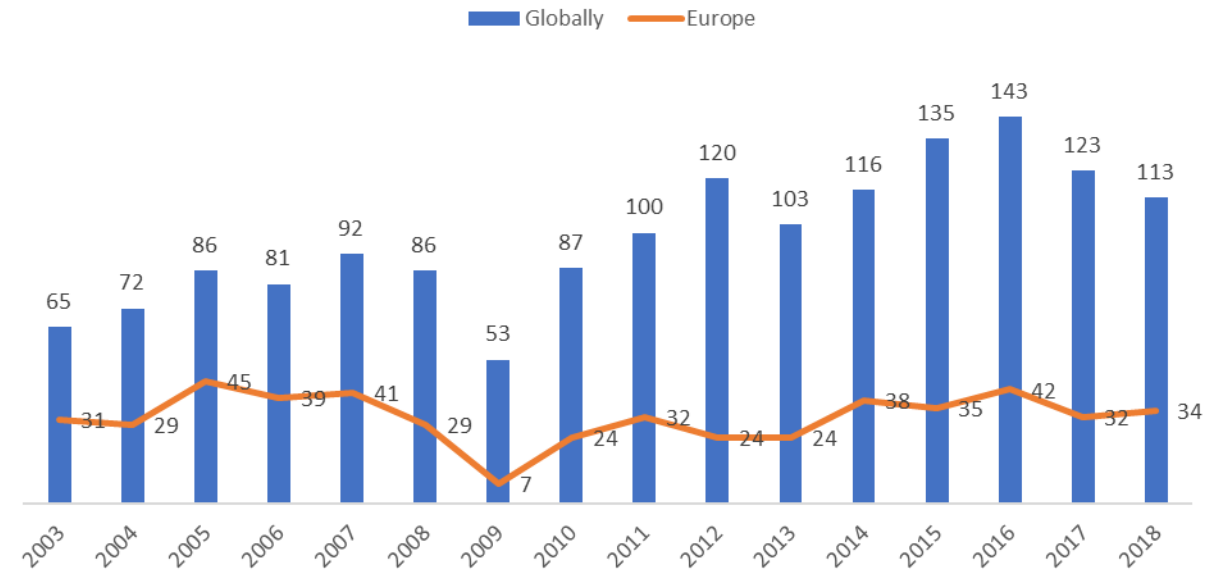
**Clusters:** industrial; transportation equipment; transportation & warehousing

**Number of projects in Lithuania:** 3 (2003 (1); 2009 (2))

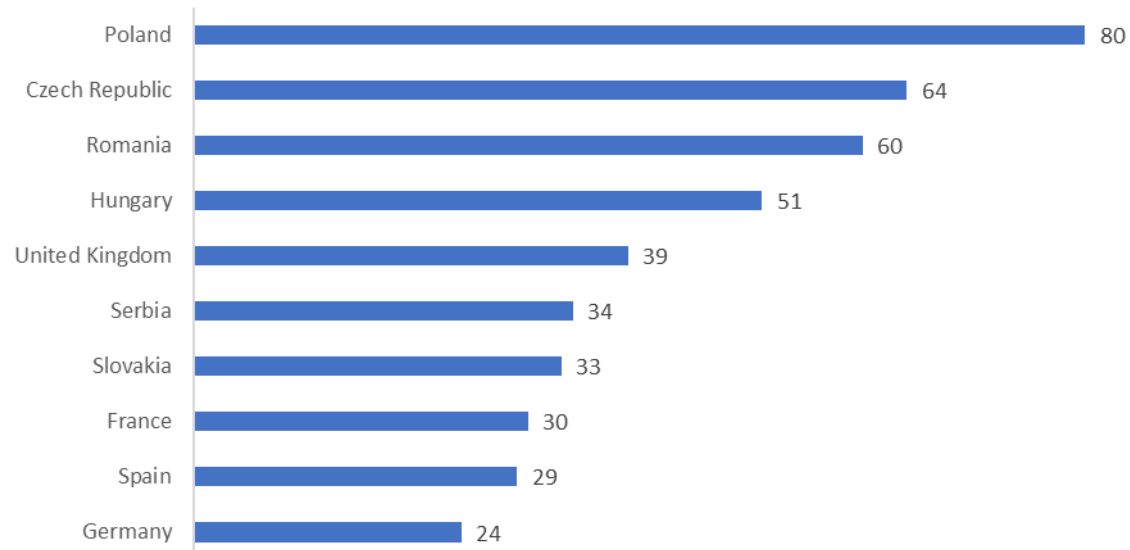
**Share of green-field projects:** 60%

**Percentage of investment projects in Europe (2014 – 2018):** 29%

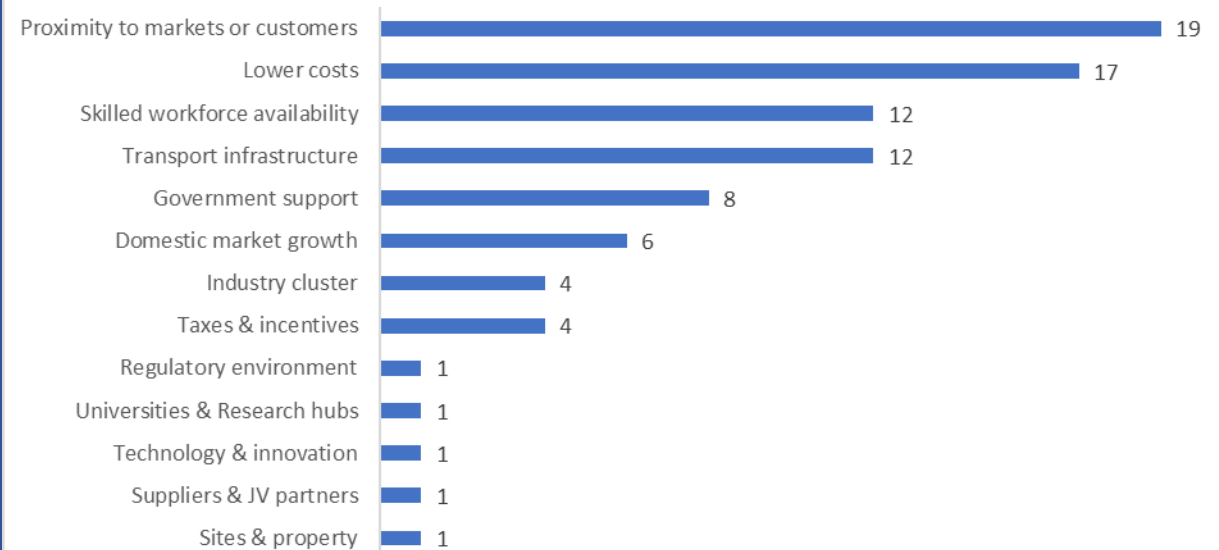
### Number of Projects 2003 - 2018



### Top 10 Destination Countries in Europe, 2003 - 2018



### Motives & Determinants, Europe 2003 - 2018



## SUB-SECTOR: MOTOR VEHICLE ELECTRICAL & ELECTRONIC

### EQUIPMENT

» 2,1% of all project globally, 2014 - 2018

**Sector:** automotive components

» 12,8% of all projects globally, 2014 - 2018

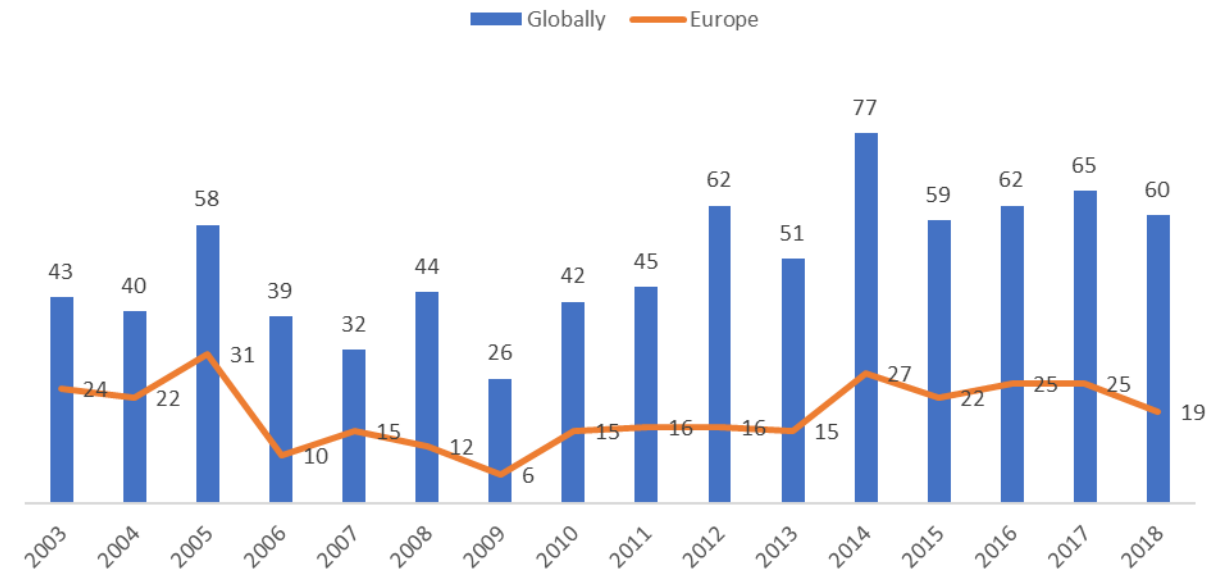
**Clusters:** transport equipment

**Number of projects in Lithuania:** 4 (2014; 2017(3))

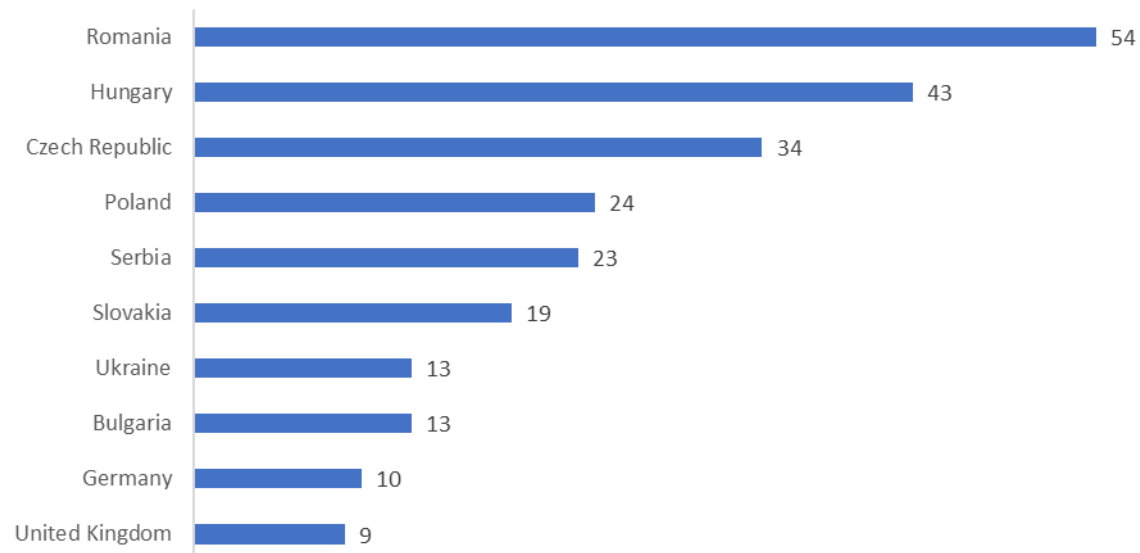
**Share of green-field projects:** 61%

**Percentage of investment projects in Europe (2014 – 2018):** 34%

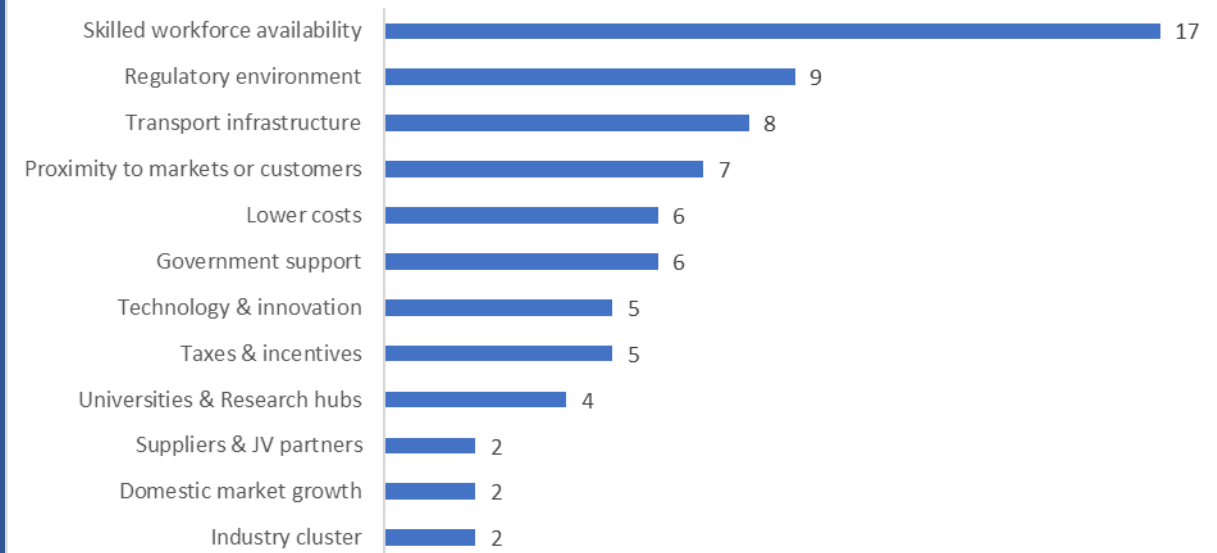
### Number of Projects, 2003 - 2018



### Top 10 Destination Countries in Europe, 2003 - 2018



### Motives & Determinants, Europe 2003 - 2018





## SUB-SECTOR: MOTOR VEHICLE GASOLINE ENGINES & ENGINE PARTS

» 1,8% of all project globally, 2014 - 2018

**Sector:** automotive components

» 12,8% of all projects globally, 2014 - 2018

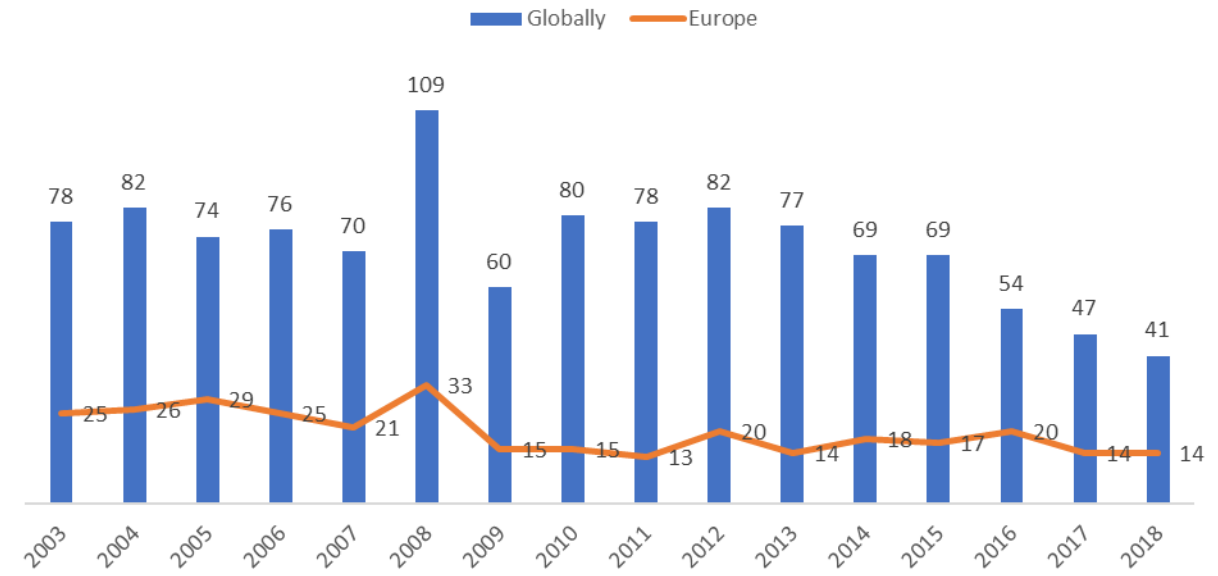
**Clusters:** energy; industrial; transport equipment

**Number of projects in Lithuania:** 0

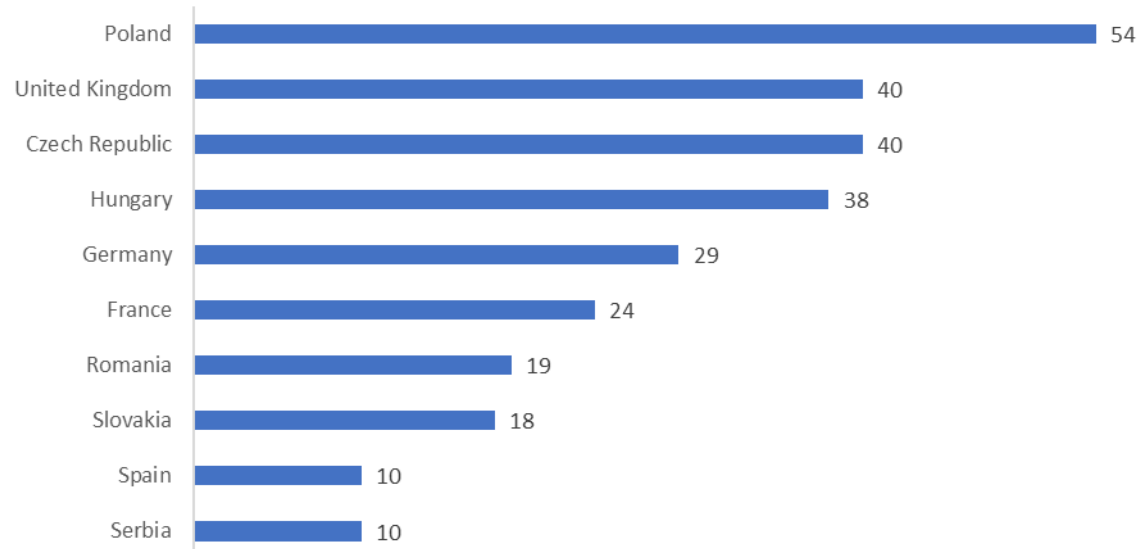
**Share of green-field projects:** 55%

**Percentage of investment projects in Europe (2014 – 2018):** 30%

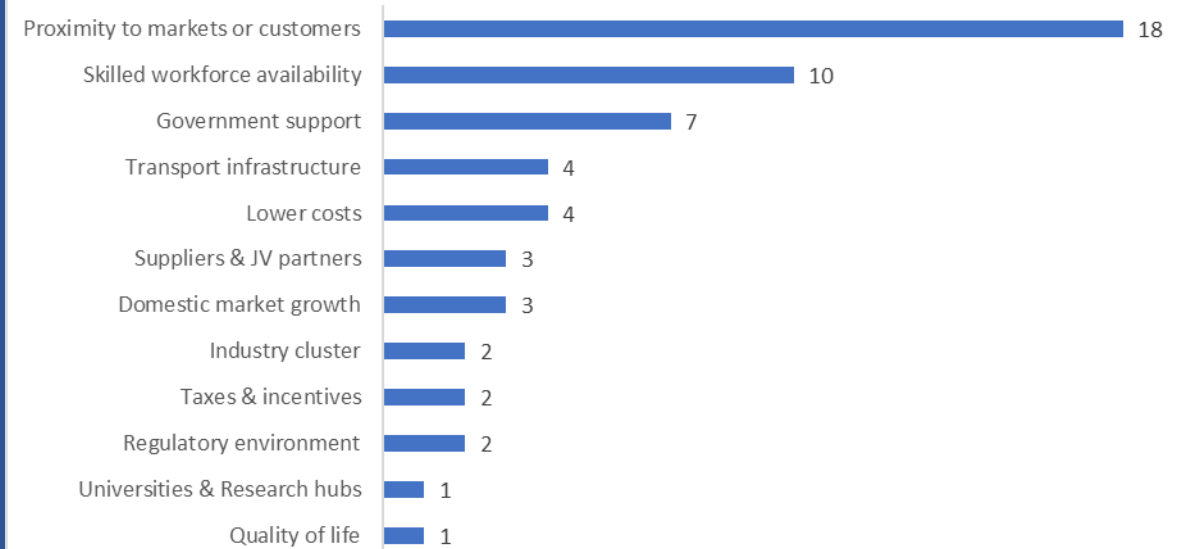
### Number of Projects, 2003 - 2018



### Top 10 Destination Countries in Europe, 2003 - 2018



### Motives & Determinants, Europe 2003 - 2018



## SUB-SECTOR: MOTOR VEHICLE SEATING & INTERIOR TRIM

» 1,6% of all project globally, 2014 - 2018

**Sector:** automotive components

» 12,8% of all projects globally, 2014 - 2018

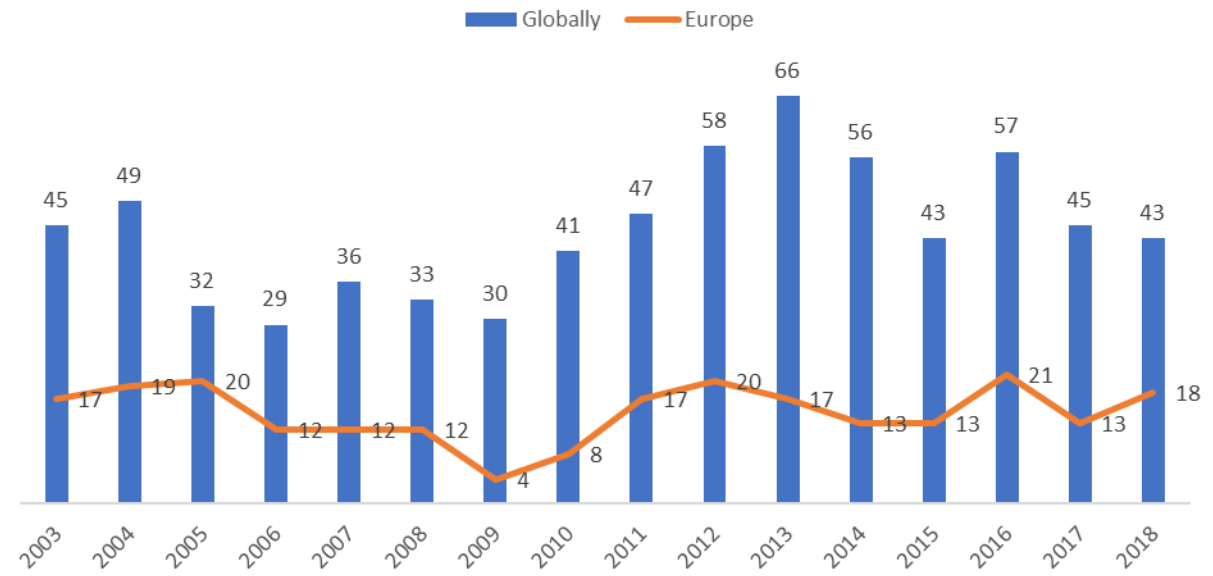
**Clusters:** consumer goods; ICT & electronics' physical science;  
transport equipment

**Number of projects in Lithuania: 0**

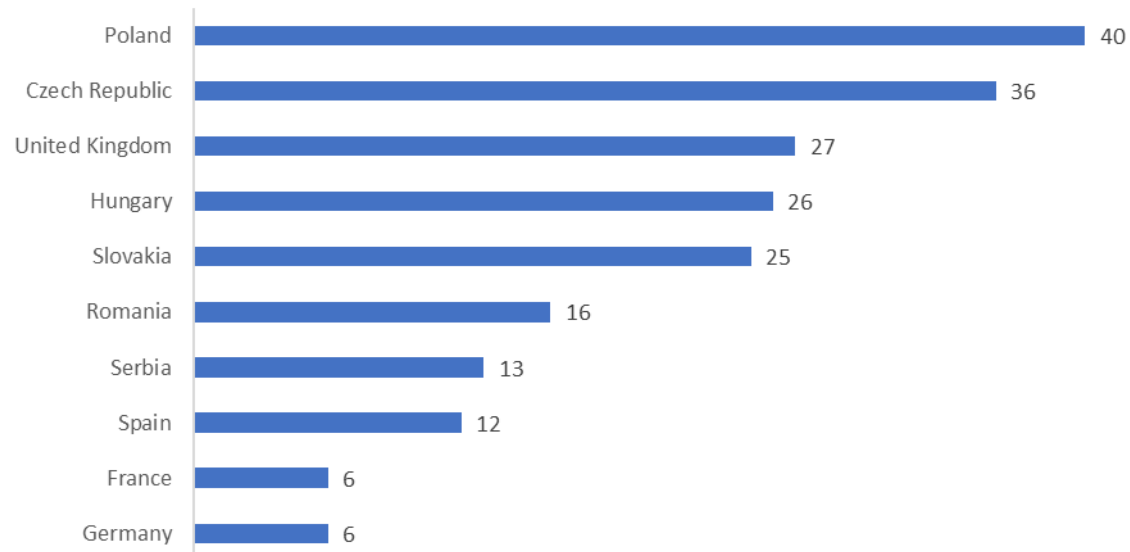
**Share of green-field projects: 66,2%**

**Percentage of investment projects in Europe (2014 – 2018): 32%**

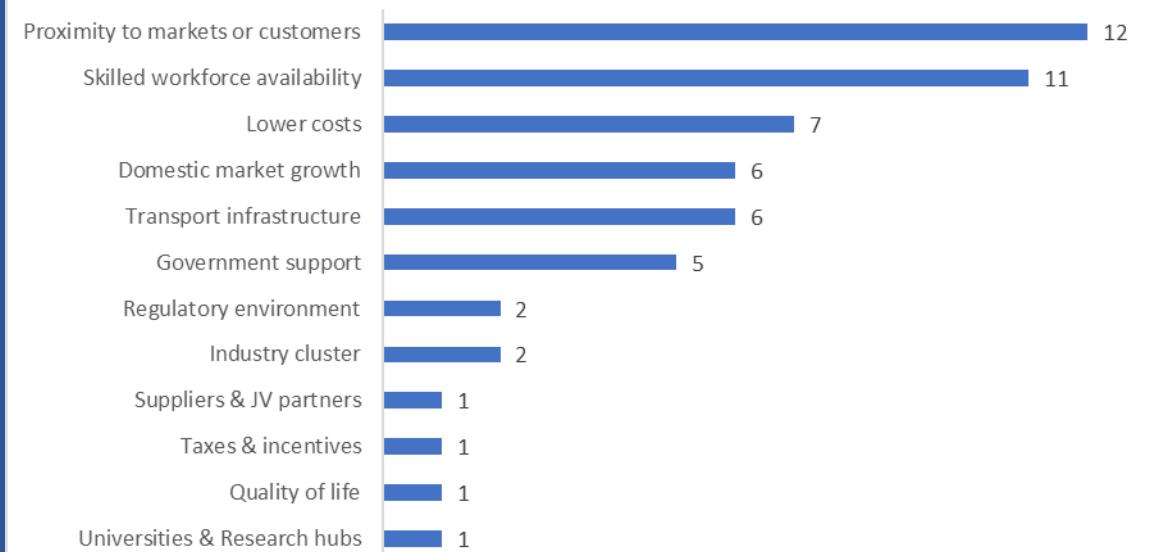
### Number of Projects, 2003 - 2018



### Top 10 Destination Countries in Europe, 2003 - 2018



### Motives & Determinants, Europe 2003 - 2018



## SUB-SECTOR: MOTOR VEHICLE STEERING & SUSPENSION COMPONENTS

» 0,9% of all project globally, 2014 - 2018

**Sector:** automotive components

» 12,8% of all projects globally, 2014 - 2018

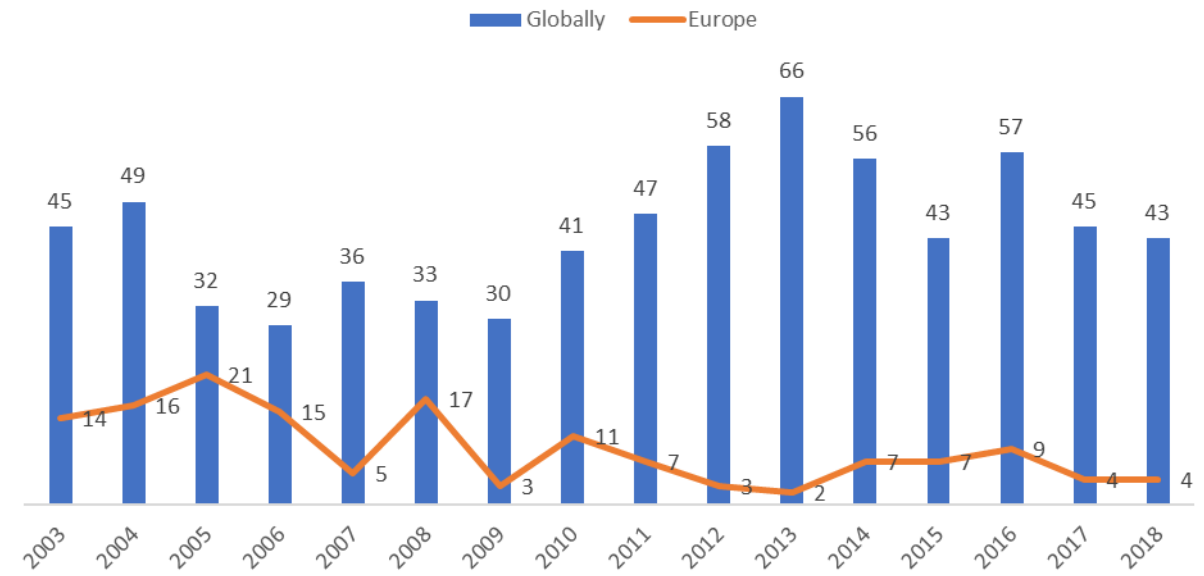
**Clusters:** construction; industrial; transport equipment; transportation & warehousing

**Number of projects in Lithuania:** 0

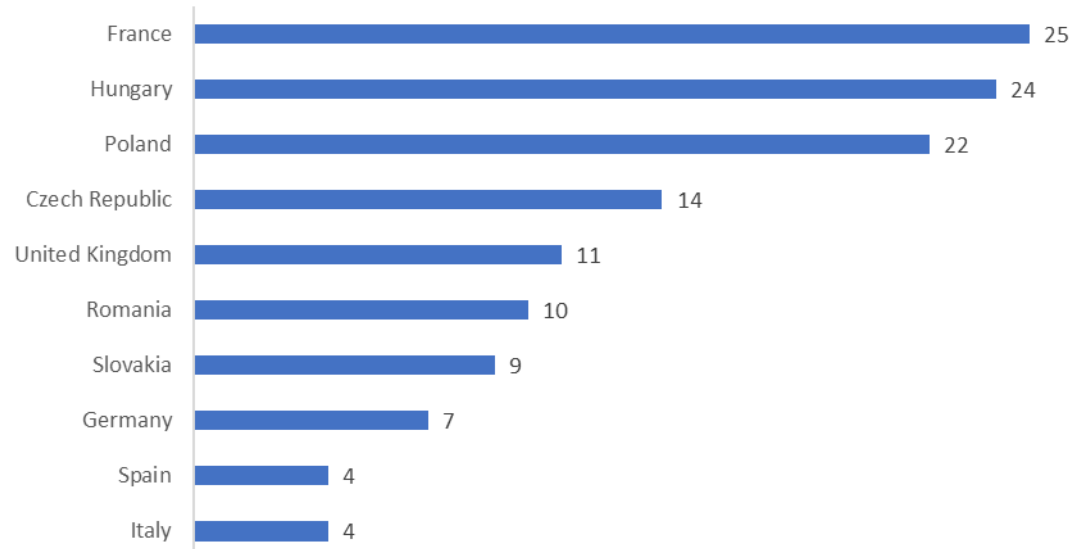
**Share of green-field projects:** 57%

**Percentage of investment projects in Europe (2014 – 2018):** 24%

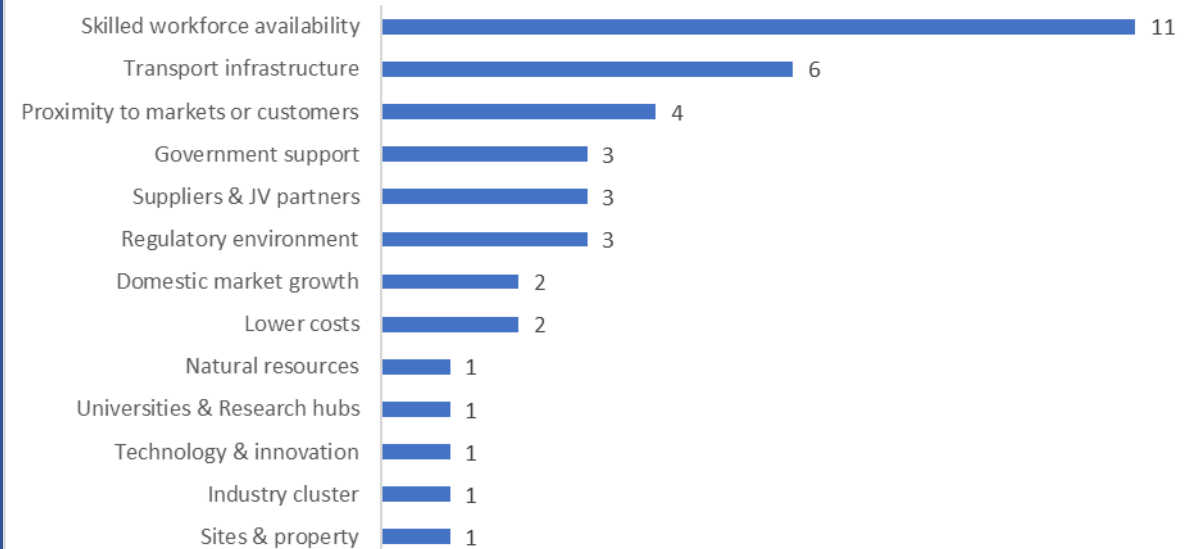
### Number of Projects, 2003 - 2018



### Top 10 Destination Countries in Europe, 2003 - 2018



### Motives & Determinants, Europe 2003 - 2018



## SUB-SECTOR: MOTOR VEHICLE BODY & TRAILERS

» 0,9% of all project globally, 2014 - 2018

**Sector:** automotive components

» 12,8% of all projects globally, 2014 - 2018

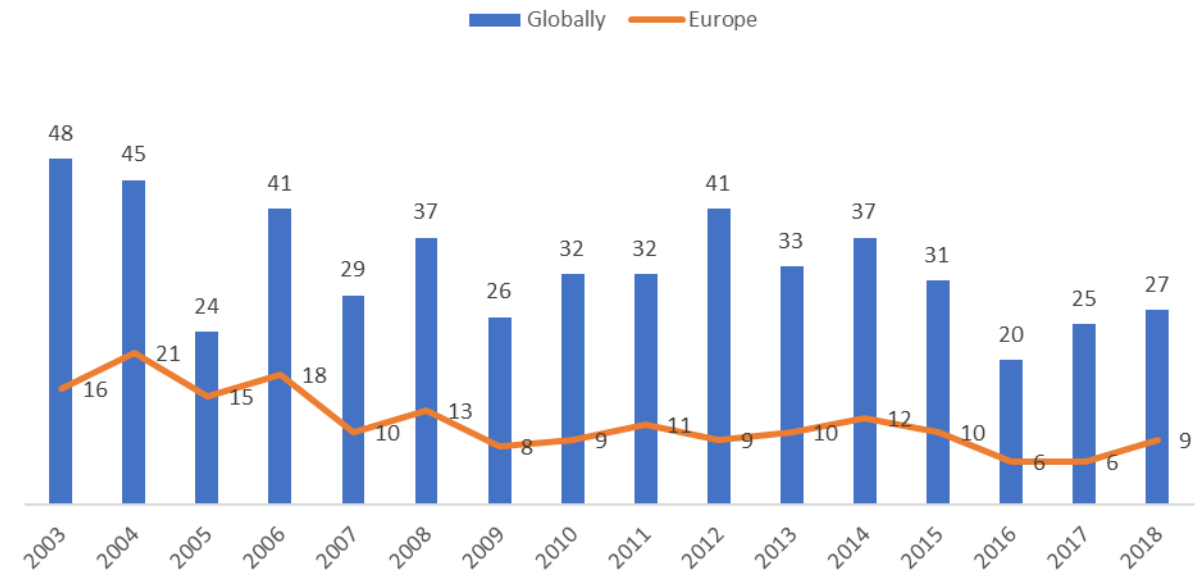
**Clusters:** agribusiness; transport equipment

**Number of projects in Lithuania:** 2 (2013; 2018)

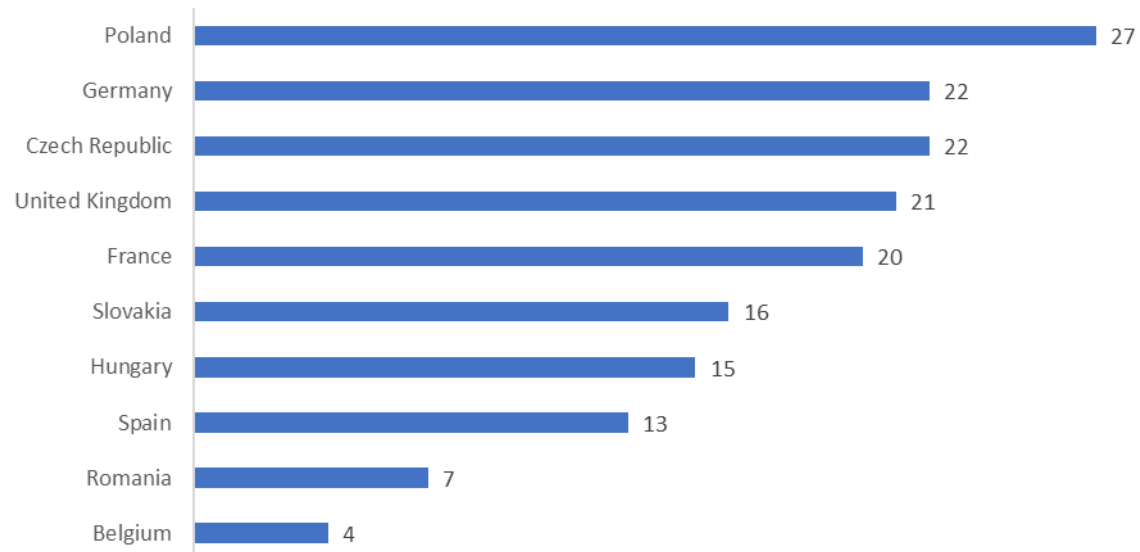
**Share of green-field projects:** 62%

**Percentage of investment projects in Europe (2014 – 2018):** 32%

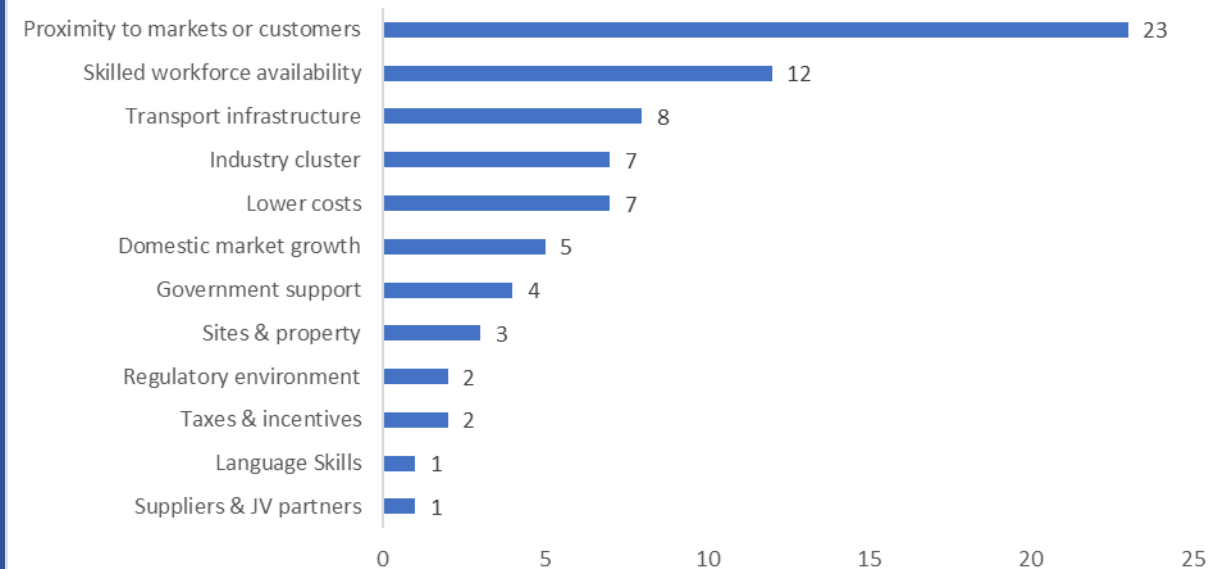
### Number of Projects, 2003 - 2018



### Top 10 Destination Countries in Europe, 2003 - 2018



### Motives & Determinants, Europe 2003 - 2018



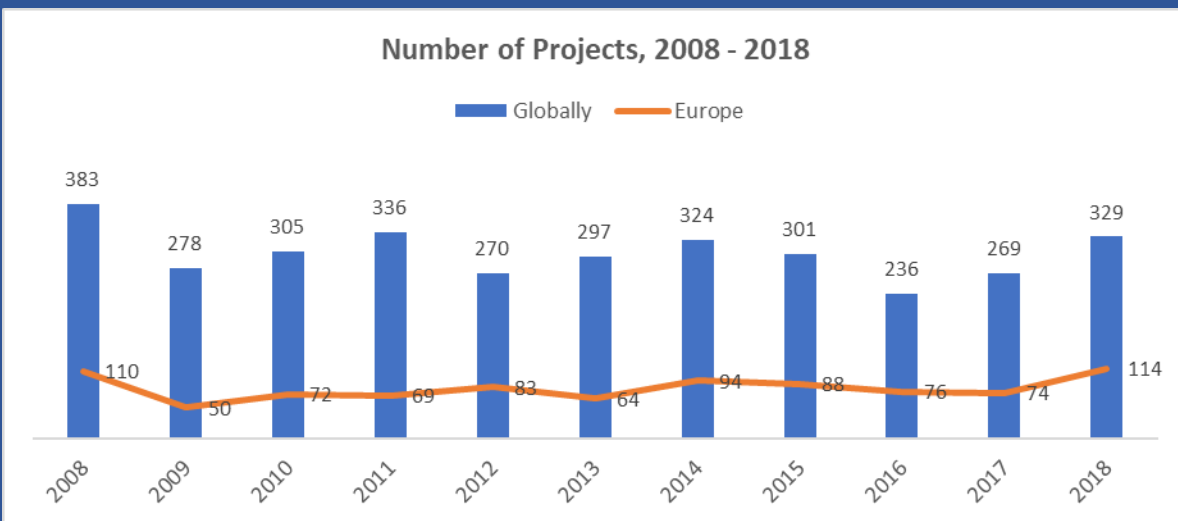
# INDUSTRIAL EQUIPMENT

## In the last 10 years (2008 – 2018):

- Number of projects globally: 3 328
- Number of projects in Europe: 894
- 27% of all investment projects in this sector happened in Europe\*

## In the last 4 years (2014 – 2018):

- Third most popular sector to invest – 9,6% of all investment projects



## Top10 destination\*\* countries globally

China (790)  
 United States (530)  
 India (460)  
 Russia (198)  
 Germany (189)  
 United Kingdom (179)  
 Brazil (162)  
 Mexico (157)  
 France (149)  
 Poland (118)

## Top10 destination countries, Europe

Germany (189)  
 United Kingdom (179)  
 France (149)  
 Poland (118)  
 Czech Republic (86)  
 Hungary (80)  
 Romania (68)  
 Slovakia (59)  
 Austria (37)  
 Bulgaria (37)

## Top10 investing\*\* countries globally

United States (840)  
 Germany (736)  
 Japan (586)  
 Switzerland (264)  
 Italy (226)  
 United Kingdom (179)  
 France (169)  
 Sweden (142)  
 China (139)  
 Austria (136)

## Top10 investing countries, Europe

Germany (736)  
 Switzerland (264)  
 Italy (226)  
 United Kingdom (179)  
 France (169)  
 Sweden (142)  
 Austria (136)  
 Denmark (95)  
 Finland (89)  
 Spain (88)

\*In total, globally and in all sectors, between 2008 and 2018, 28% of all investment projects happened in Europe

\*\* Based on number of investment projects in the sector

## SUB-SECTOR: GENERAL PURPOSE MACHINERY

» 3% of all project globally, 2014 - 2018

**Sector:** industrial equipment

» 9,6% of all projects globally, 2014 – 2018

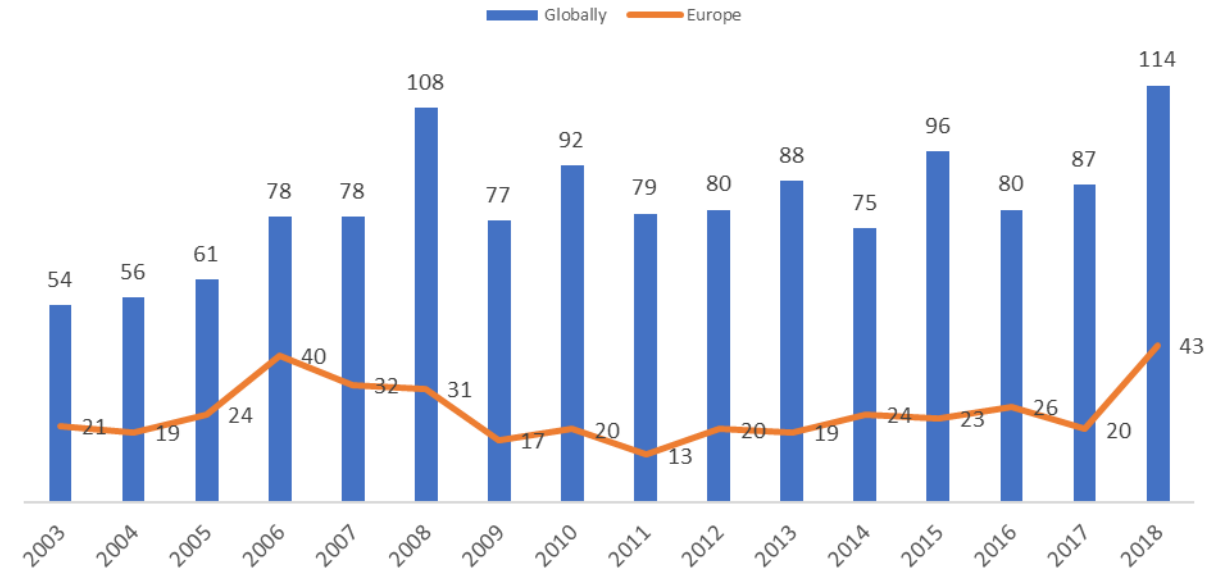
**Clusters:** agribusiness; construction; consumer goods; energy; environmental technology; ICT & electronics; industrial; life science; physical science; transport equipment; transportation & warehousing; wood, apparel & related products

**Number of projects in Lithuania:** 3 (2014; 2015; 2019)

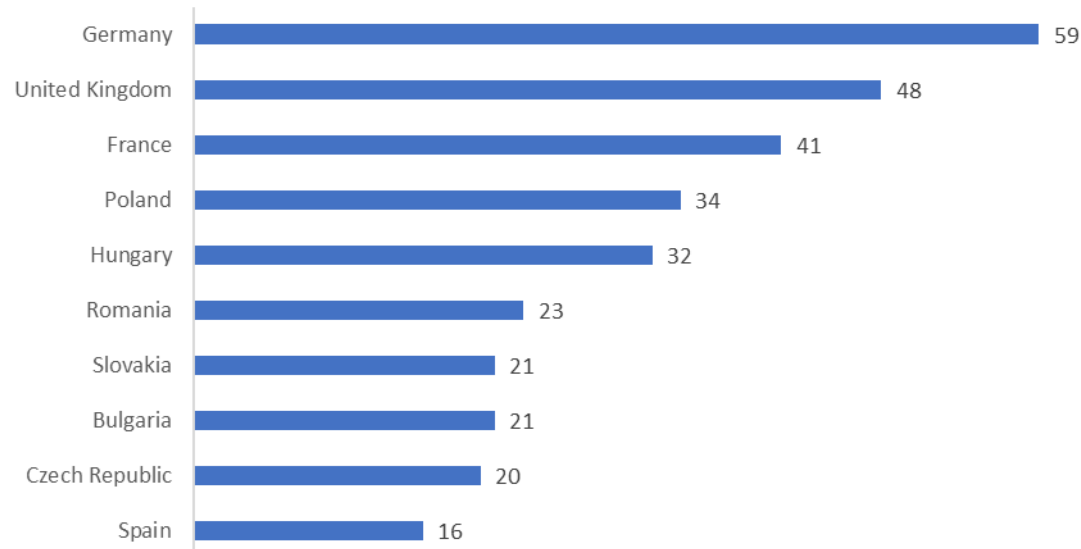
**Share of green-field projects:** 66%

**Percentage of investment projects in Europe (2014 – 2018):** 30%

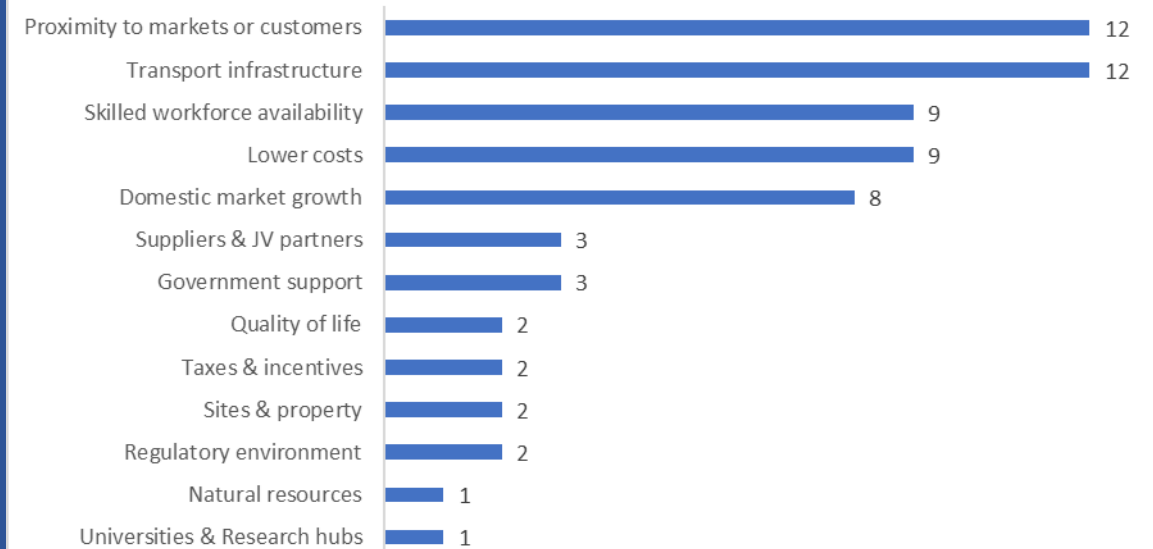
## Number of Projects, 2003 - 2018



## Top 10 Destination Countries in Europe, 2003 - 2018



## Motives & Determinants, Europe 2003 - 2018



## SUB-SECTOR: AGRICULTURE, CONSTRUCTION & MINING MACHINERY

» 1,5% of all project globally, 2014 - 2018

**Sector:** industrial equipment

» 9,6% of all projects globally, 2014 – 2018

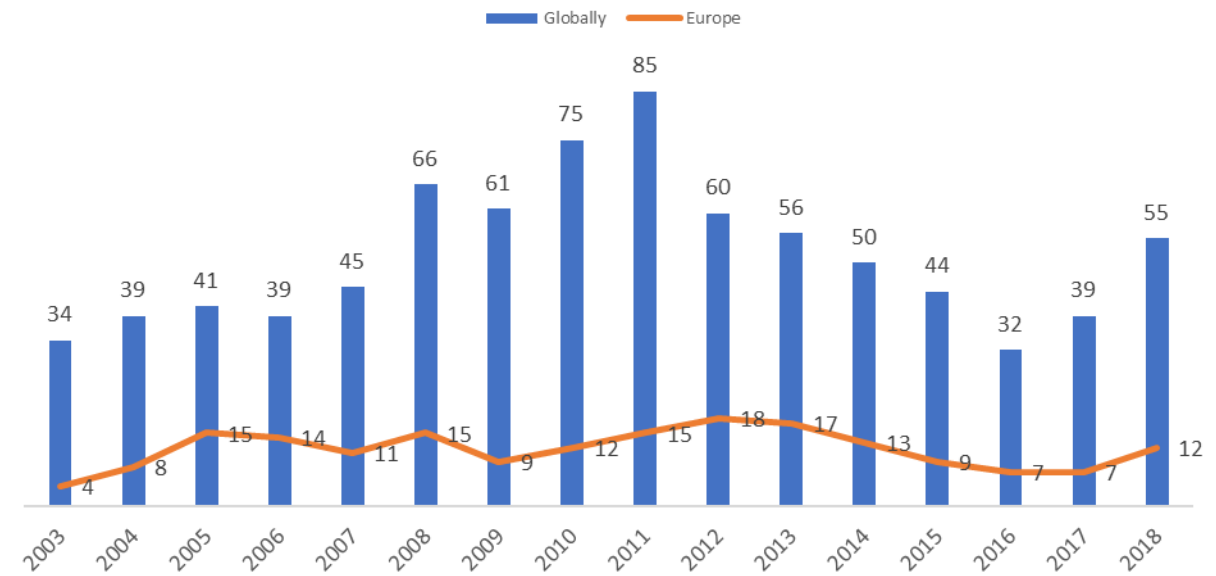
**Clusters:** agribusiness; construction; energy; environmental technology; industrial; physical science; transport equipment; transportation & warehousing

**Number of projects in Lithuania:** 5 (2010; 2013 (2); 2015 (2))

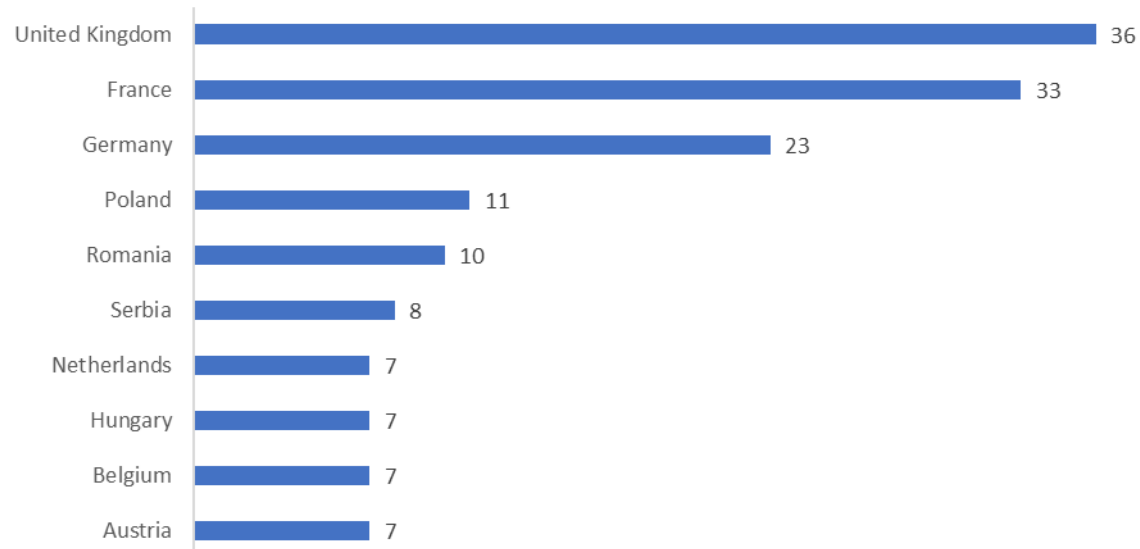
**Share of green-field projects:** 64%

**Percentage of investment projects in Europe (2014 – 2018):** 22%

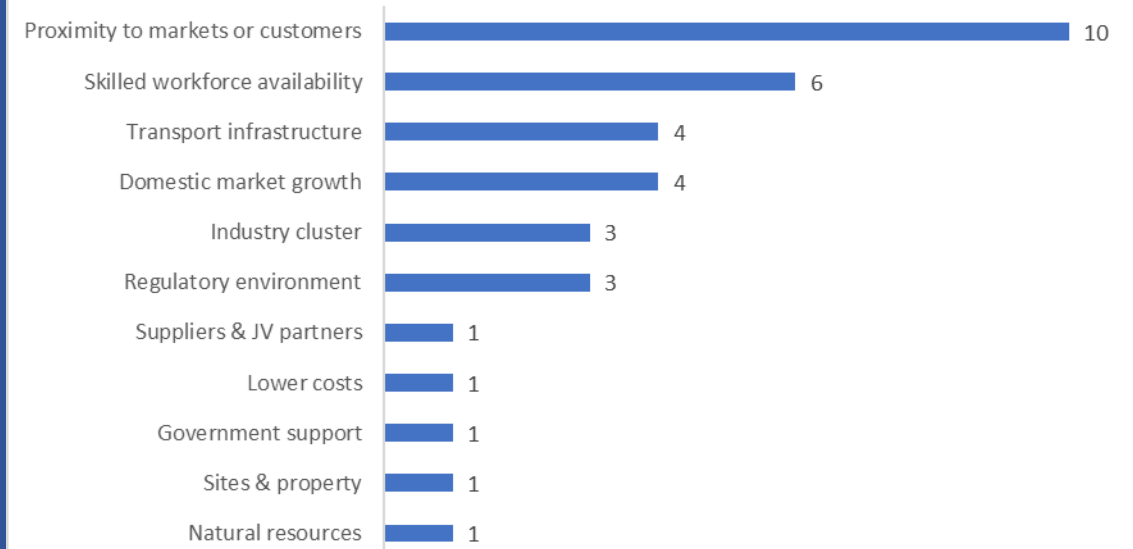
### Number of Projects, 2003 - 2018



### Top 10 Destination Countries in Europe, 2003 - 2018



### Motives & Determinants, Europe 2003 - 2018



## SUB-SECTOR: ALL OTHER INDUSTRIAL MACHINERY

» 0,4% of all project globally, 2014 - 2018

**Sector:** industrial equipment

» 9,6% of all projects globally, 2014 - 2018

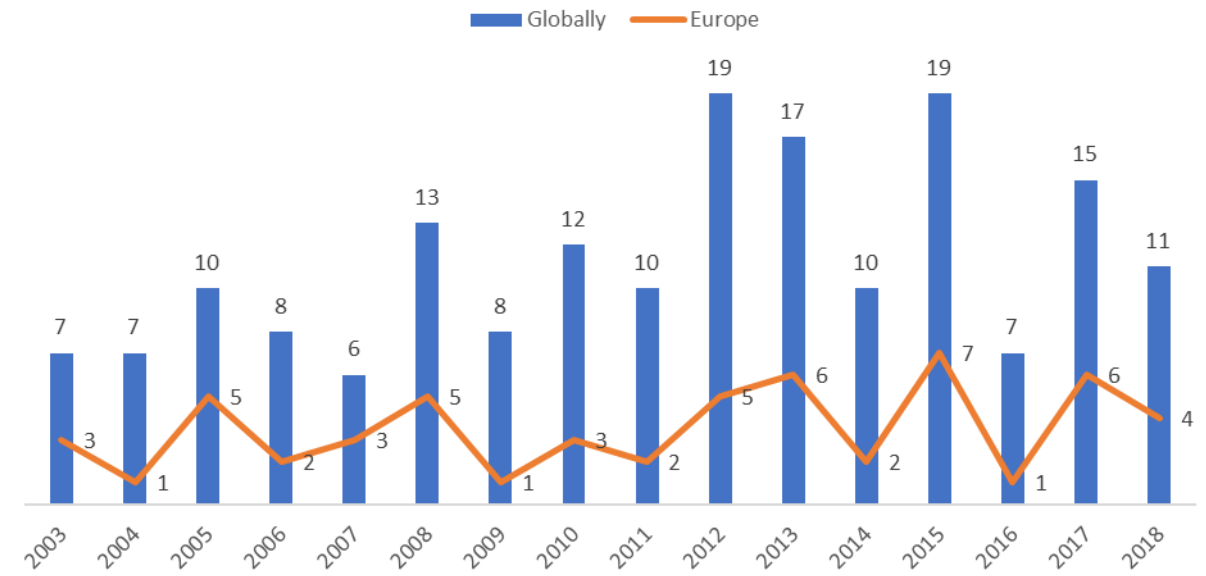
**Clusters:** agribusiness; construction; consumer goods; creative industries; energy; environmental technology; ICT & electronics; industrial; life science; physical science; retail trade; transport equipment; transportation & warehousing

**Number of projects in Lithuania:** 4 (2005 (2); 2013; 2016)

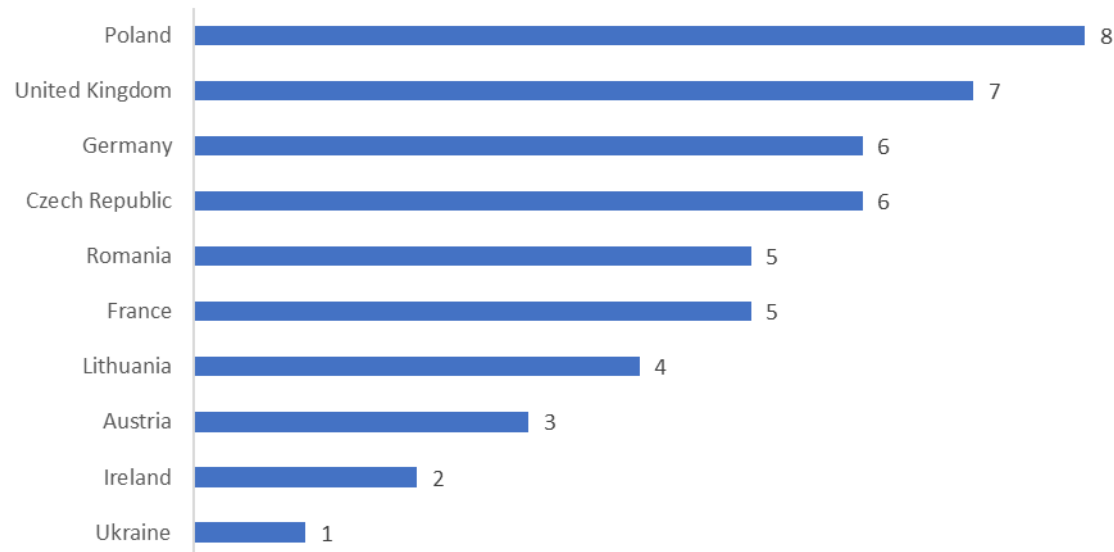
**Share of green-field projects:** 66%

**Percentage of investment projects in Europe (2014 – 2018):** 32%

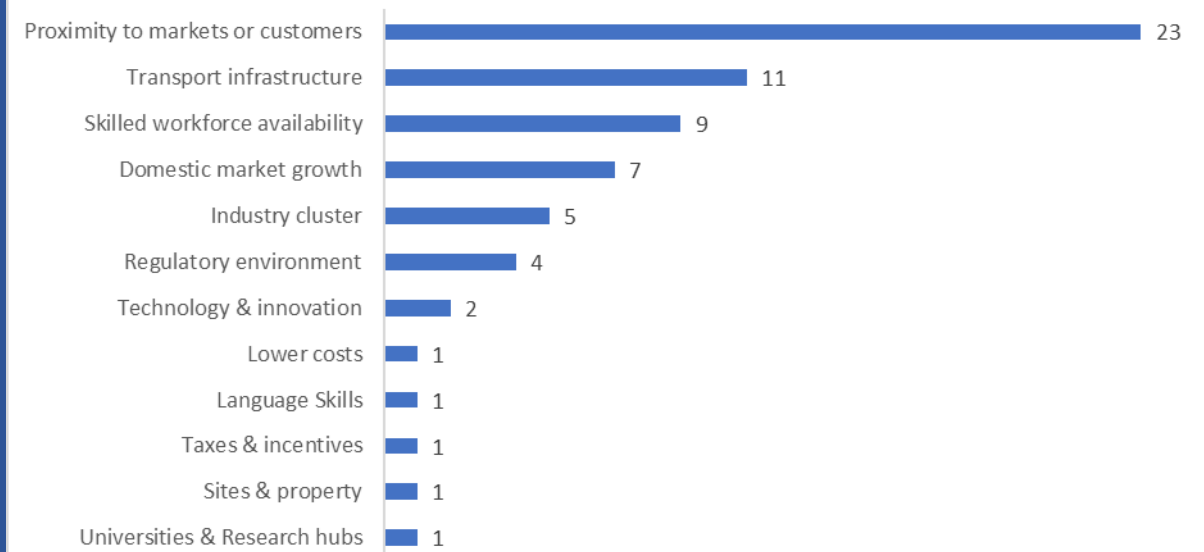
## Number of Projects, 2003 - 2018



## Top 10 Destination Countries in Europe, 2003 - 2018



## Motives & Determinants, Europe 2003 - 2018





## SUB-SECTOR: PRINTING MACHINERY & EQUIPMENT

» 0,2% of all project globally, 2014 - 2018

**Sector:** industrial equipment

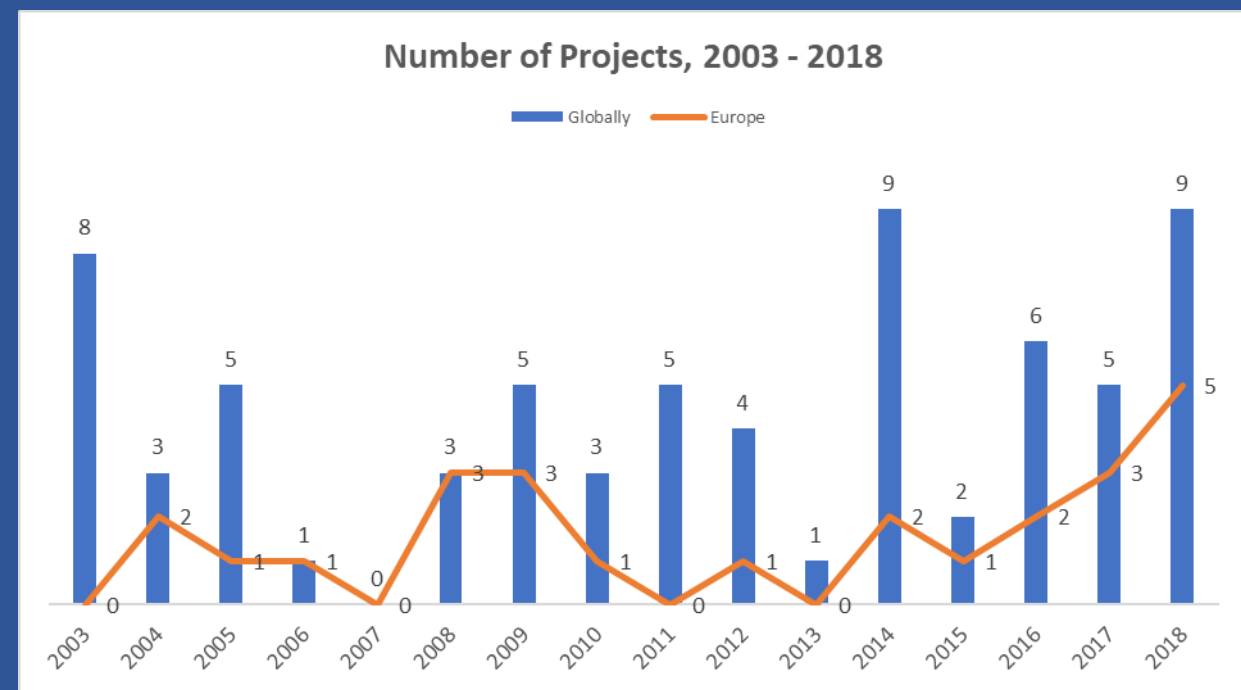
» 9,6% of all projects globally, 2014 – 2018

**Clusters:** consumer goods; creative industries; industrial; wood, apparel & related products

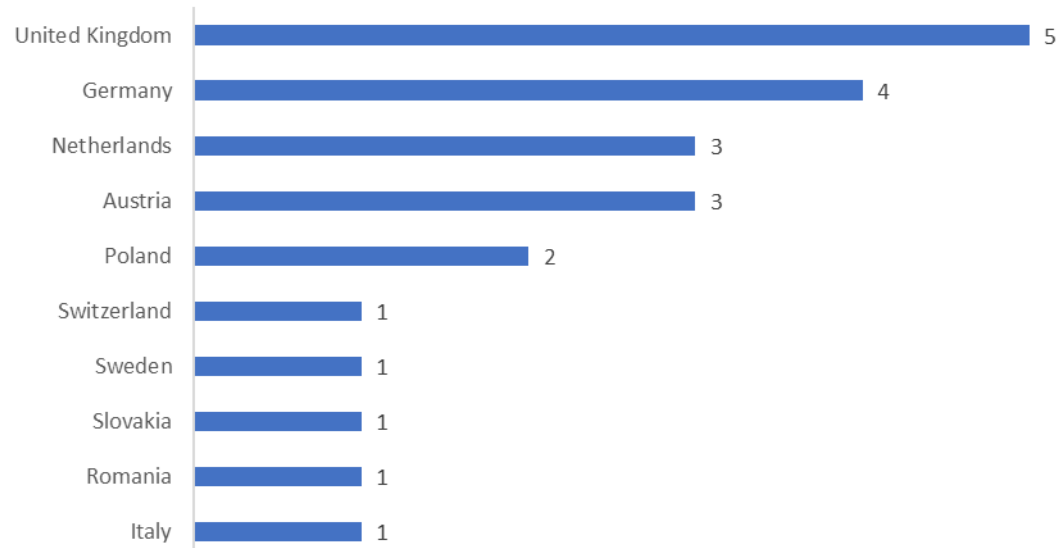
**Number of projects in Lithuania: 0**

**Share of green-field projects: 65%**

**Percentage of investment projects in Europe (2014 – 2018): 42%**



### Top 10 Destination Countries in Europe, 2003 - 2018



### Motives & Determinants, Europe 2003 – 2018

➤ Skilled workforce availability

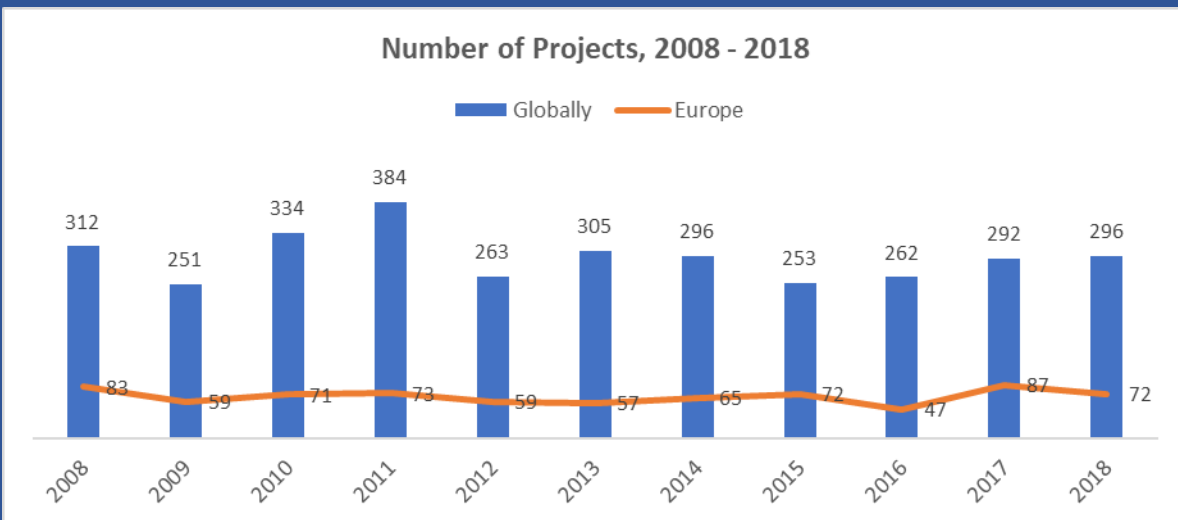
# CHEMICALS

## In the last 10 years (2008 – 2018):

- Number of projects globally: 3 248
- Number of projects in Europe: 745
- 23% of all investment projects in this sector happened in Europe\*

## In the last 4 years (2014 – 2018):

- 9,2% of all investment projects happened in this sector



## Top10 destination\*\* countries globally

China (1031)  
 United States (460)  
 India (260)  
 Brazil (202)  
 Germany (183)  
 Russia (143)  
 France (142)  
 Thailand (140)  
 Belgium (115)  
 Singapore (105)

## Top10 destination countries, Europe

Germany (183)  
 France (142)  
 Belgium (115)  
 Spain (102)  
 United Kingdom (102)  
 Poland (73)  
 Netherlands (64)  
 Hungary (45)  
 Italy (37)  
 Sweden (28)

## Top10 investing\*\* countries globally

United States (1018)  
 Germany (766)  
 Japan (683)  
 France (349)  
 Netherlands (260)  
 Switzerland (240)  
 United Kingdom (153)  
 Belgium (111)  
 South Korea (87)  
 India (84)

## Top10 investing countries, Europe

Germany (766)  
 France (349)  
 Netherlands (260)  
 Switzerland (240)  
 United Kingdom (153)  
 Belgium (111)  
 Finland (67)  
 Norway (66)  
 Italy (65)  
 Denmark (57)

\*In total, globally and in all sectors, between 2008 and 2018, 28% of all investment projects happened in Europe

\*\* Based on number of investment projects in the sector

## SUB-SECTOR: BASIC CHEMICALS

» 3,3% of all project globally, 2014 - 2018

### Sector: chemicals

» 9,2% of all projects globally, 2014 - 2018

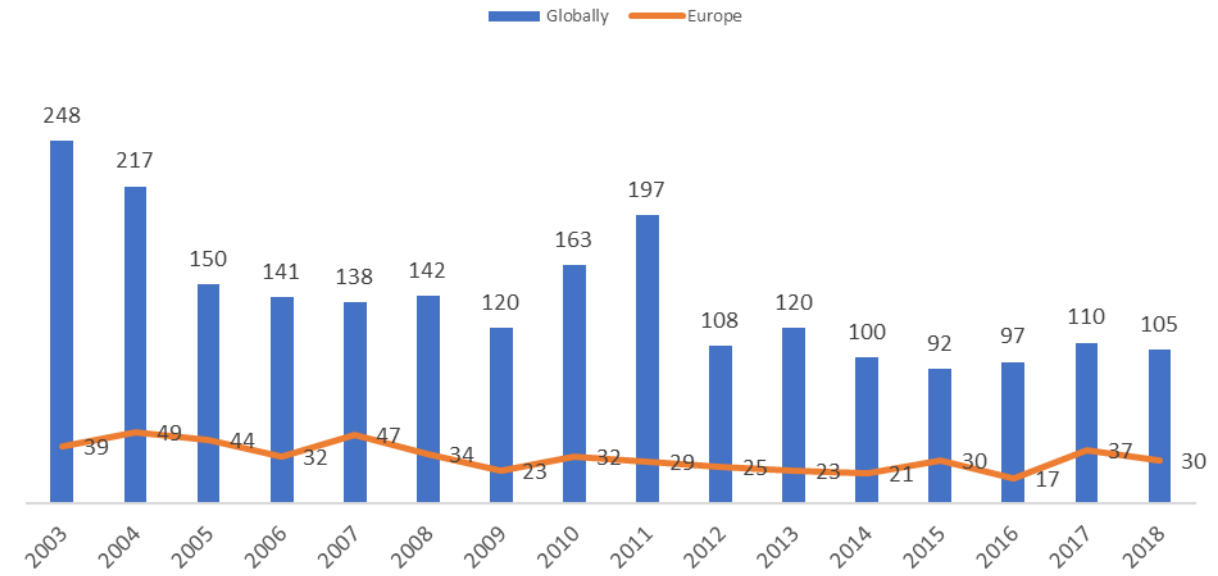
**Clusters:** agribusiness; construction; consumer goods; energy; environmental technology; ICT & electronics; industrial; life science; physical science; transport equipment; wood, apparel & related products

**Number of projects in Lithuania:** 2 (2015; 2018)

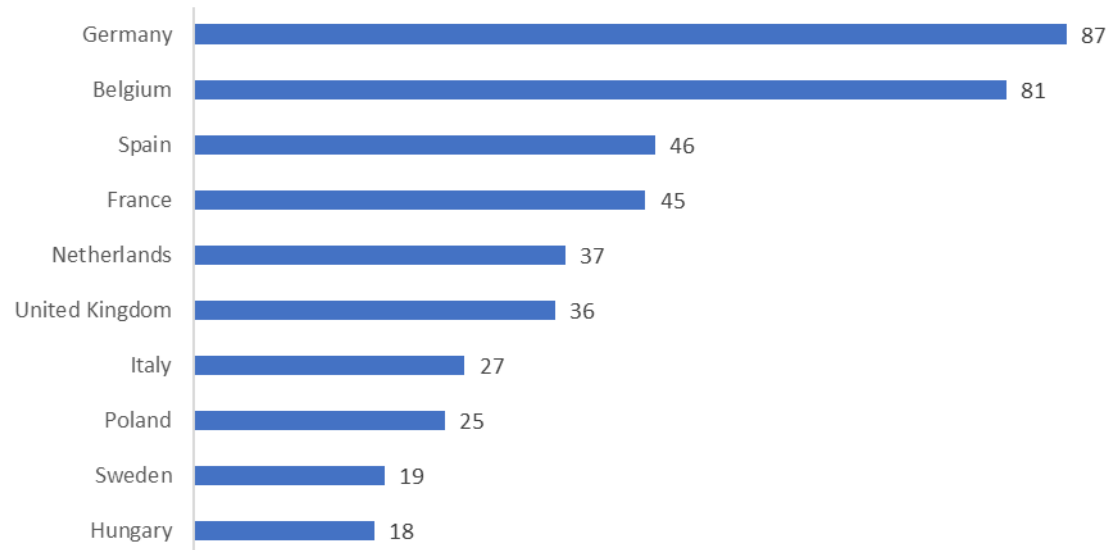
**Share of green-field projects:** 62%

**Percentage of investment projects in Europe (2014 – 2018):** 27%

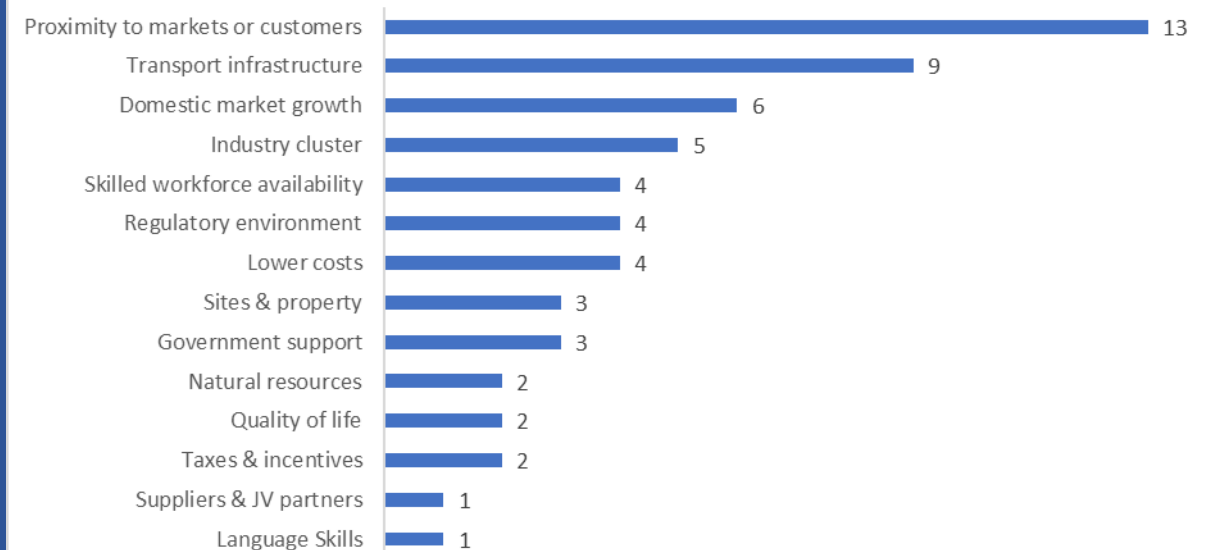
## Number of Projects, 2003 - 2018



## Top 10 Destination Countries in Europe, 2003 - 2018



## Motives & Determinants, Europe 2003 - 2018



## SUB-SECTOR: PAINTS, COATING, ADDITIVES & ADHESIVES

» 4,2% of all project globally, 2014 - 2018

**Sector:** chemicals

» 9,2% of all projects globally, 2014 - 2018

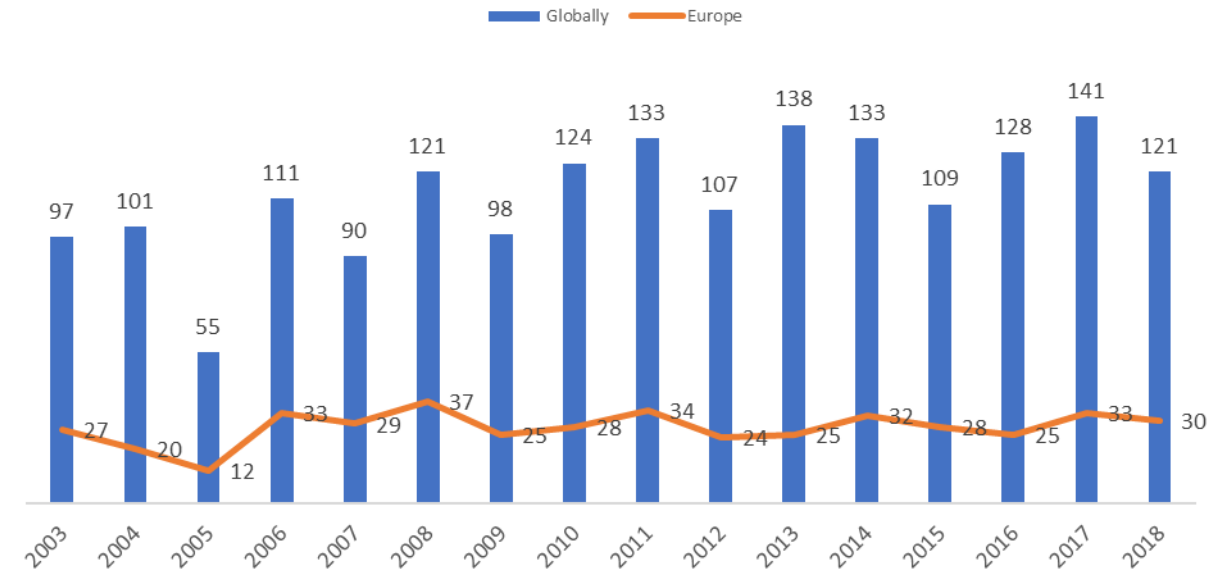
**Clusters:** industrial; construction; physical science; transport equipment; agribusiness; consumer goods; environmental technology

**Number of projects in Lithuania:** 2 (2003; 2006)

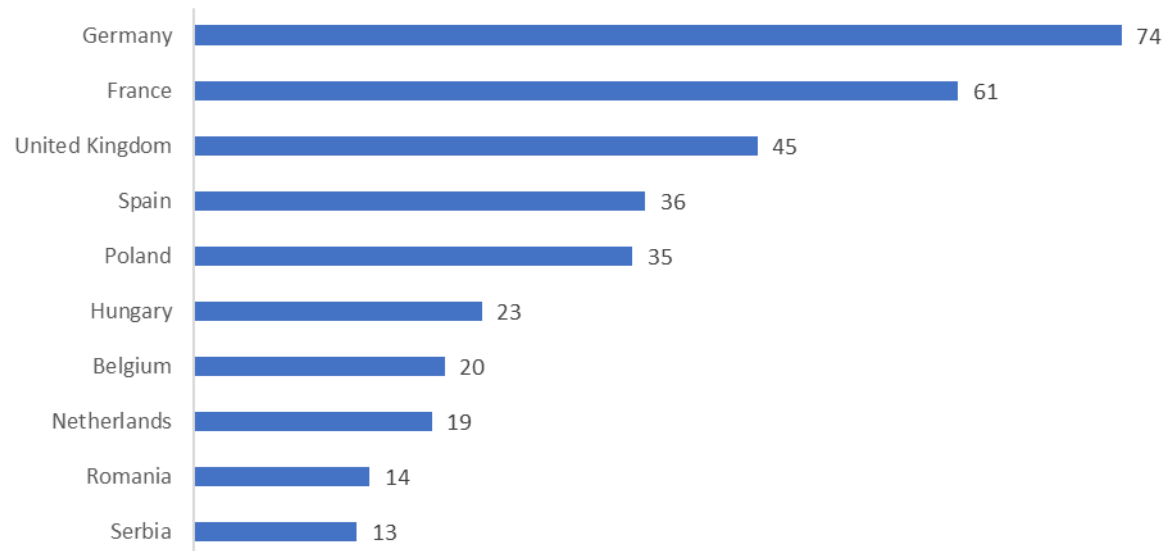
**Share of green-field projects:** 60%

**Percentage of investment projects in Europe (2014 – 2018):** 23%

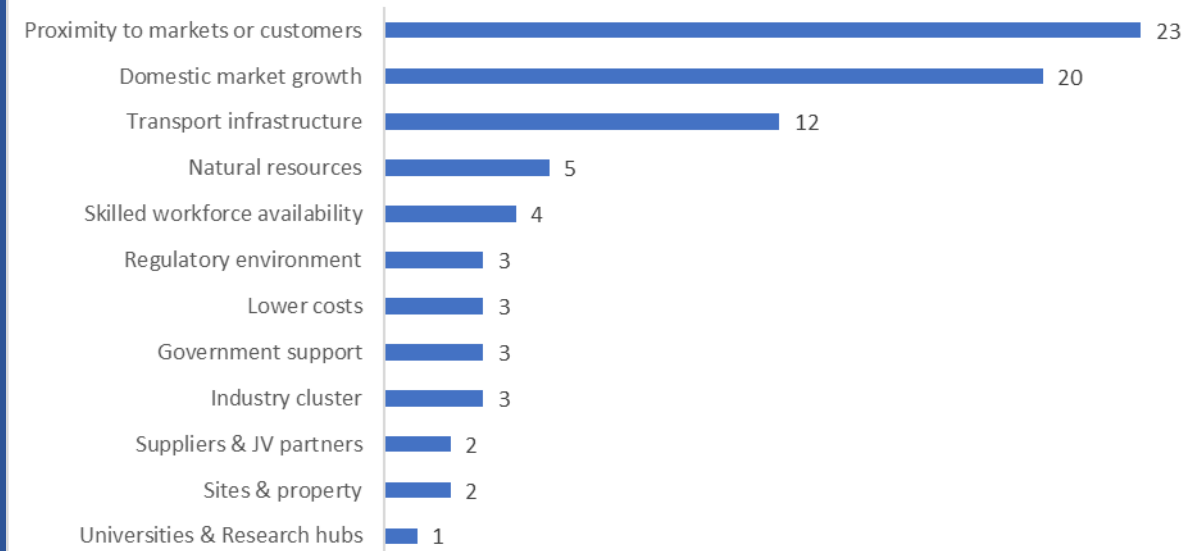
### Number of Projects, 2003 - 2018



### Top 10 Destination Countries in Europe, 2003 - 2018



### Motives & Determinants, Europe 2003 - 2018



## SUB-SECTOR: PESTICIDE, FERTILISERS & OTHER AGRICULTURAL CHEMICALS

» 0,9% of all project globally, 2014 - 2018

**Sector:** chemicals

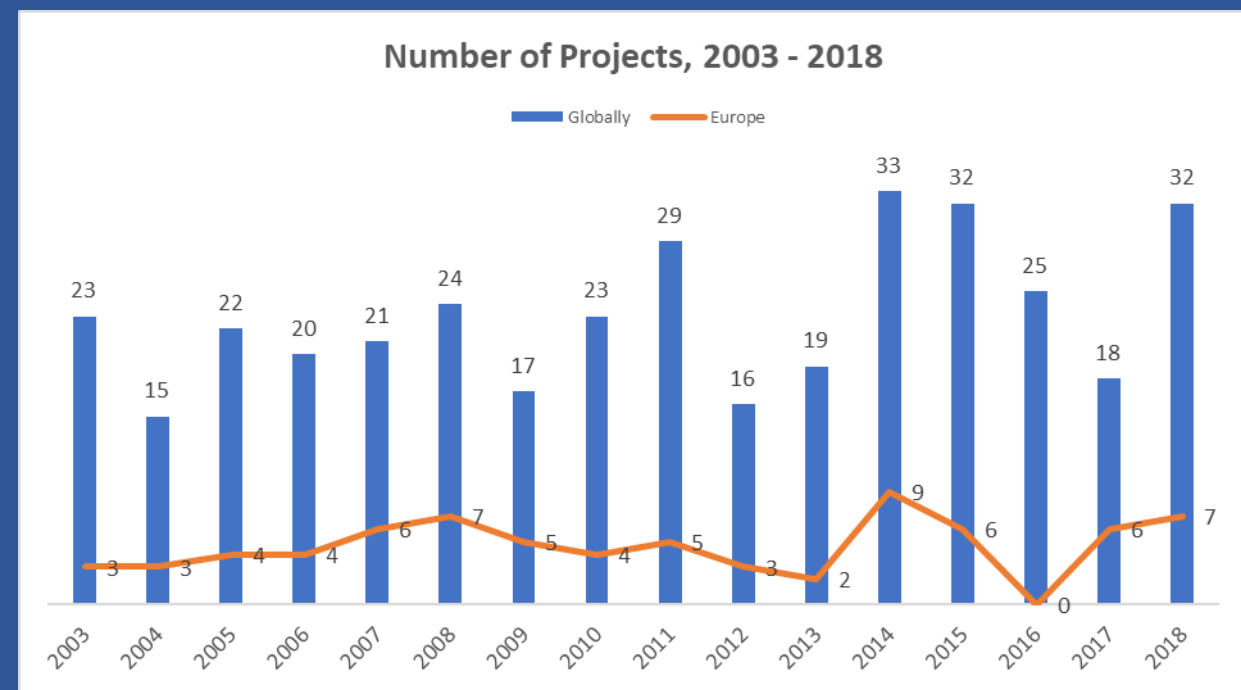
» 9,2% of all projects globally, 2014 – 2018

**Clusters:** agribusiness; industrial; life science; physical science

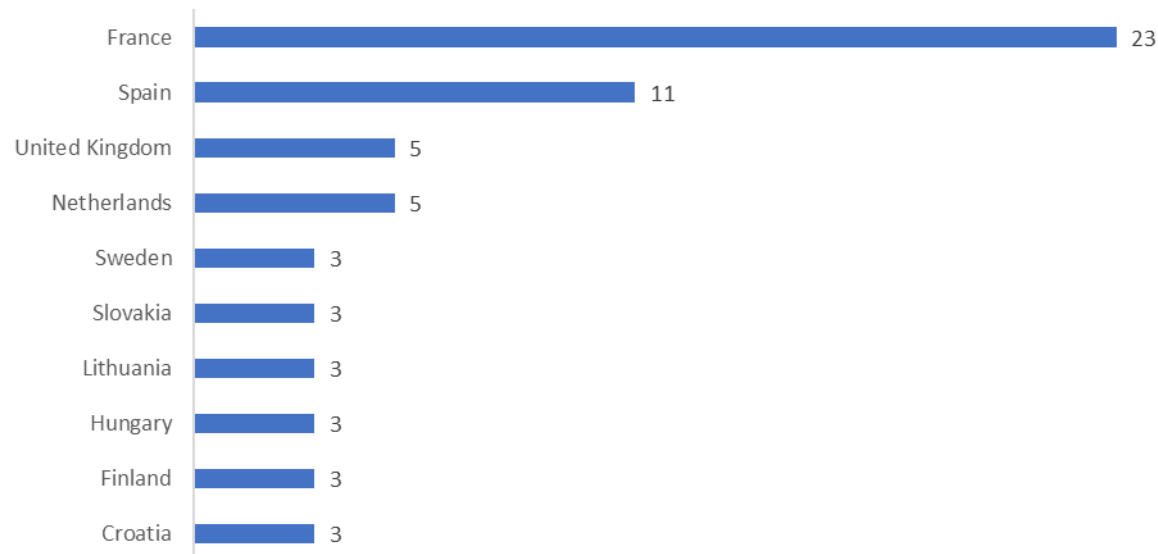
**Number of projects in Lithuania:** 3 (2010; 2015; 2018)

**Share of green-field projects:** 66%

**Percentage of investment projects in Europe (2014 – 2018):** 20%



### Top 10 Destination Countries in Europe, 2003 - 2018



### Motives & Determinants, Europe 2003 – 2018

- Quality of life
- Transport infrastructure
- Natural resources

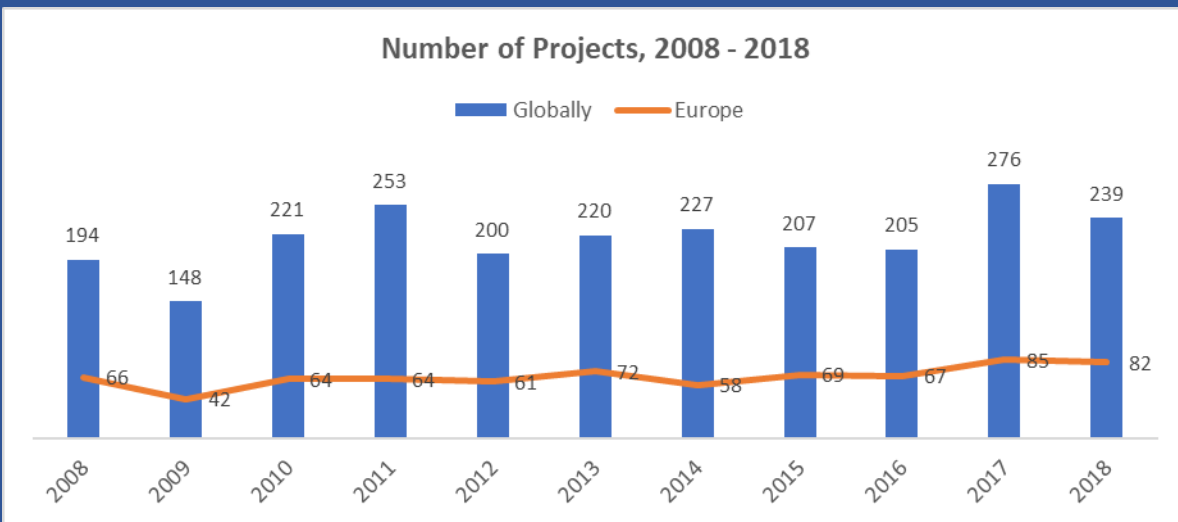
# PLASTICS

## In the last 10 years (2008 – 2018):

- Number of projects globally: 2 390
- Number of projects in Europe: 730
- 31% of all investment projects in this sector happened in Europe\*

## In the last 4 years (2014 – 2018):

- 7,6% of all investment projects happened in this sector



## Top10 destination\*\* countries globally

United States (529)  
 China (506)  
 Mexico (172)  
 Poland (152)  
 Germany (150)  
 India (128)  
 France (113)  
 Thailand (113)  
 Brazil (103)  
 United Kingdom (101)

## Top10 destination countries, Europe

Poland (152)  
 Germany (150)  
 France (113)  
 United Kingdom (101)  
 Spain (87)  
 Hungary (68)  
 Czech Republic (57)  
 Slovakia (48)  
 Romania (43)  
 Belgium (42)

## Top10 investing\*\* countries globally

United States (550)  
 Germany (502)  
 Japan (455)  
 United Kingdom (145)  
 France (119)  
 Austria (116)  
 South Korea (107)  
 Italy (97)  
 Netherlands (94)  
 Belgium (90)

## Top10 investing countries, Europe

Germany (502)  
 United Kingdom (145)  
 France (119)  
 Austria (116)  
 Italy (97)  
 Netherlands (94)  
 Belgium (90)  
 Switzerland (89)  
 Spain (74)  
 Sweden (53)

\*In total, globally and in all sectors, between 2008 and 2018, 28% of all investment projects happened in Europe

\*\* Based on number of investment projects in the sector

## SUB-SECTOR: PLASTICS PACKAGING MATERIALS & UNLAMINATED FILM & SHEETS

» 2,2% of all project globally, 2014 - 2018

### Sector: plastics

» 7,6% of all projects globally, 2014 – 2018

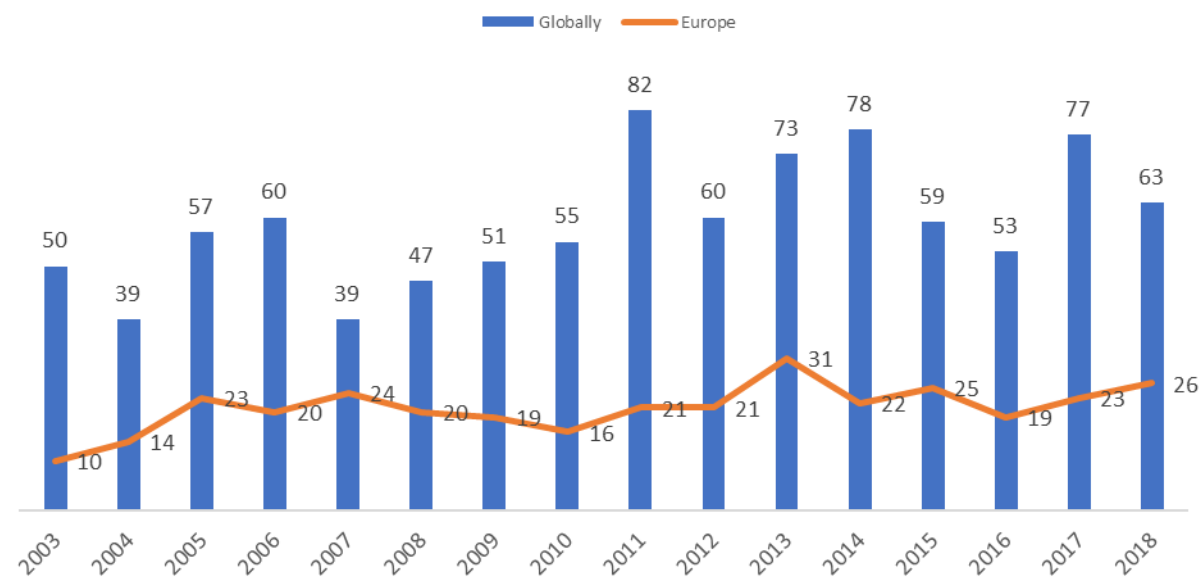
**Clusters:** agribusiness; construction; consumer goods; creative industries; energy; environmental technology; ICT & electronics; industrial; life science; physical science; retail trade; transport equipment; transportation & warehousing; wood, apparel & related products

**Number of projects in Lithuania:** 1 (2017)

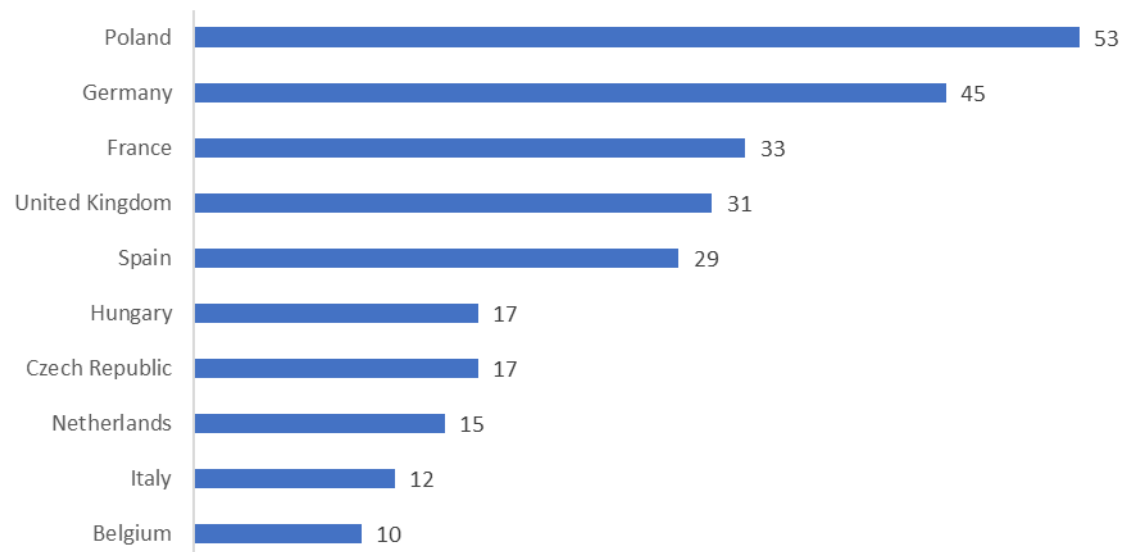
**Share of green-field projects:** 52%

**Percentage of investment projects in Europe (2014 – 2018):** 35%

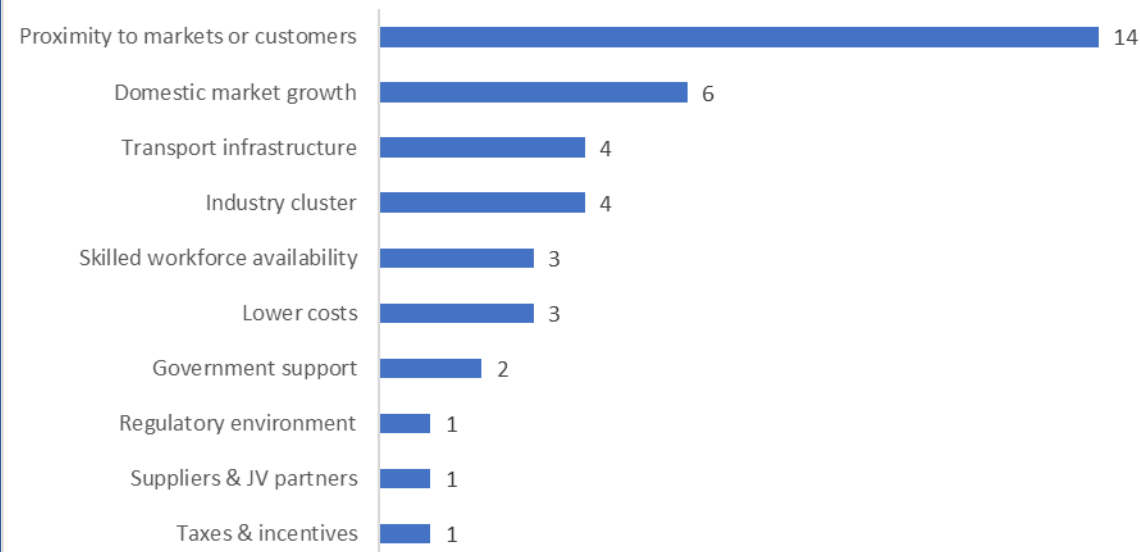
## Number of Projects, 2003 - 2018



## Top 10 Destination Countries in Europe, 2003 - 2018



## Motives & Determinants, Europe 2003 - 2018



## SUB-SECTOR: URETHANE, FOAM PRODUCTS & OTHER COMPOUNDS

» 1,9% of all project globally, 2014 - 2018

### Sector: plastics

» 7,6% of all projects globally, 2014 – 2018

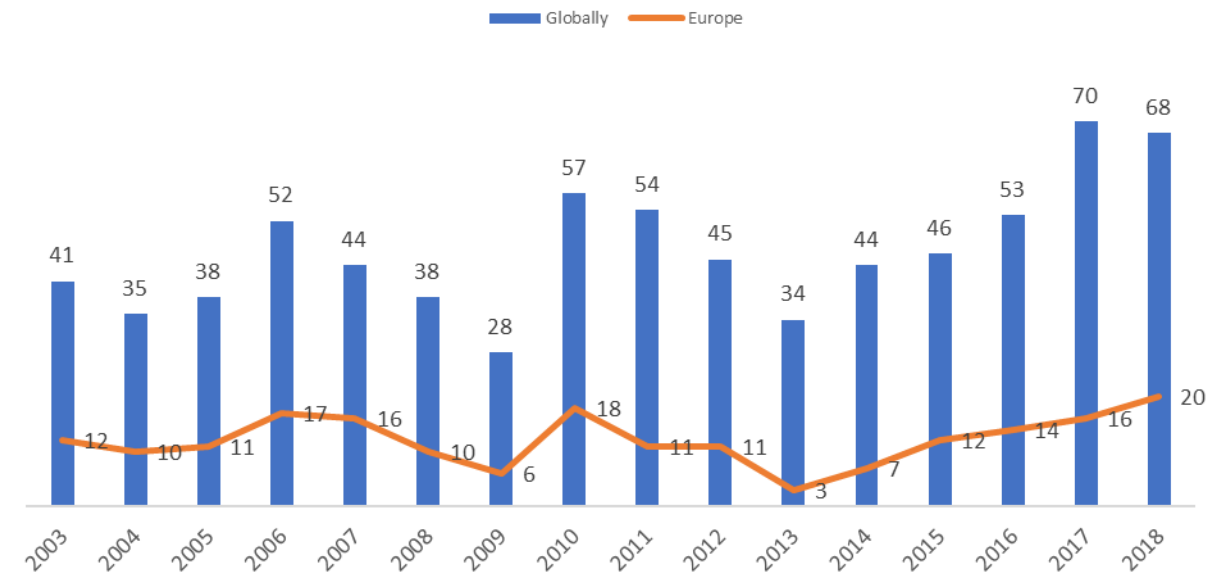
**Clusters:** agribusiness; construction; consumer goods; environmental technology; ICT & electronics; industrial; life science; physical science; transport equipment; wood, apparel & related products

**Number of projects in Lithuania:** 4 (2004; 2006; 2015; 2018)

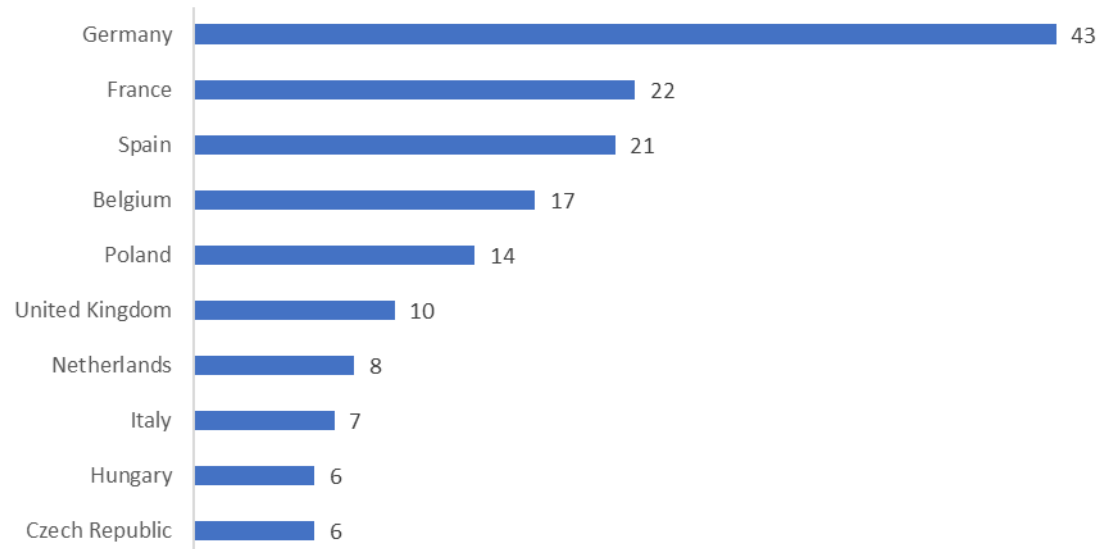
**Share of green-field projects:** 51%

**Percentage of investment projects in Europe (2014 – 2018):** 25%

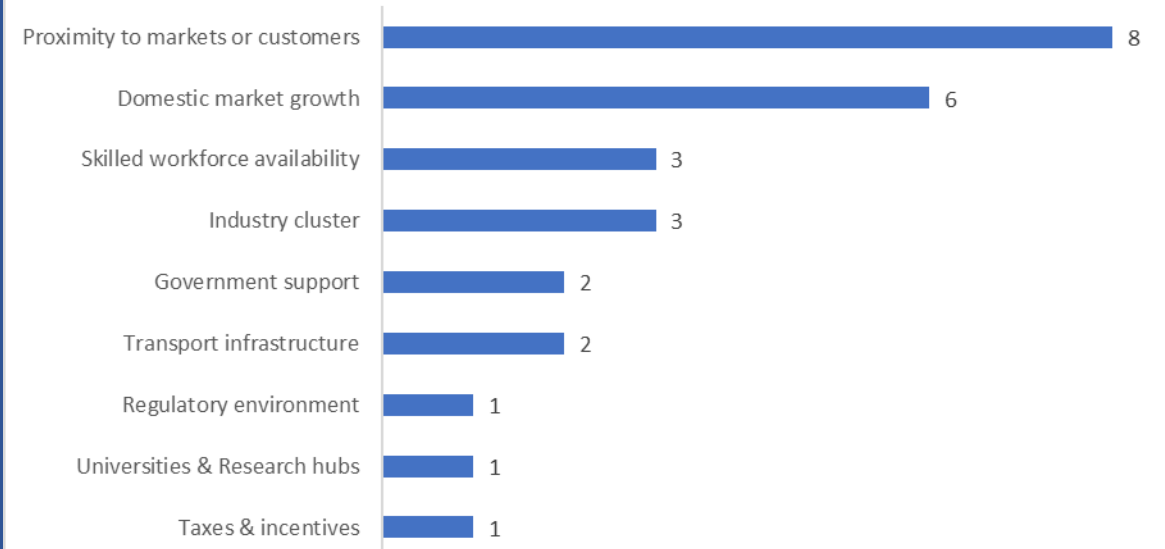
## Number of Projects, 2003 - 2018



## Top 10 Destination Countries in Europe, 2003 - 2018



## Motives & Determinants, Europe 2003 - 2018





## SUB-SECTOR: LAMINATED PLASTICS PLATES, SHEETS & SHAPES

» 1,7% of all project globally, 2014 - 2018

**Sector:** plastics

» 7,6% of all projects globally, 2014 – 2018

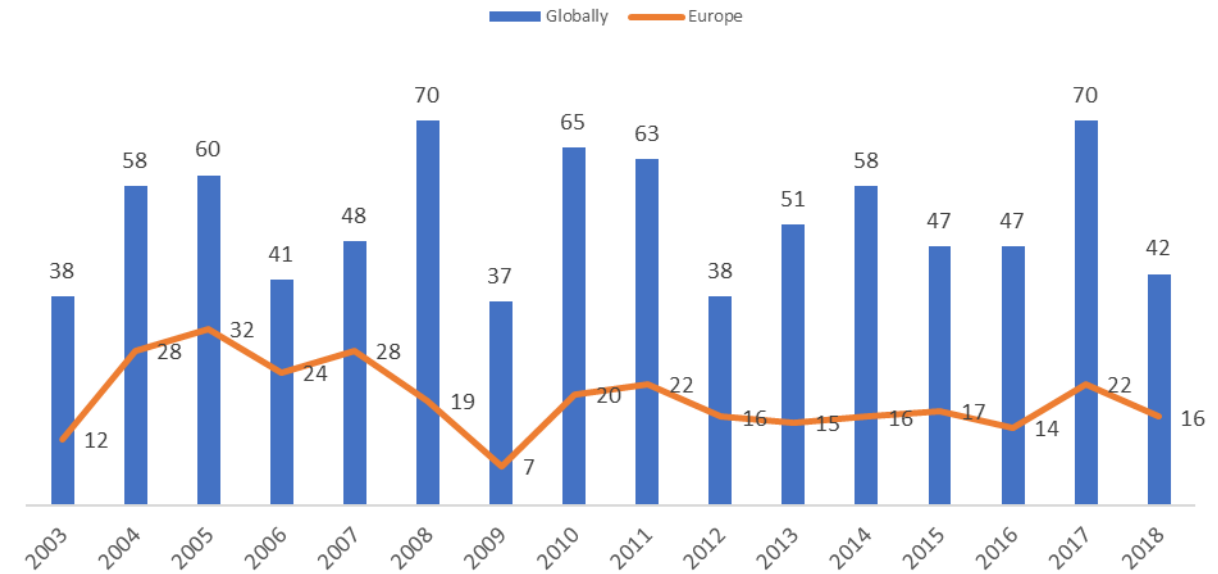
**Clusters:** agribusiness; construction; consumer goods; energy; environmental technology; financial services; ICT & electronics; industrial; life science; physical science; transport equipment; transportation & warehousing; wood, apparel & related products

**Number of projects in Lithuania:** 3 (2008, 2012, 2018)

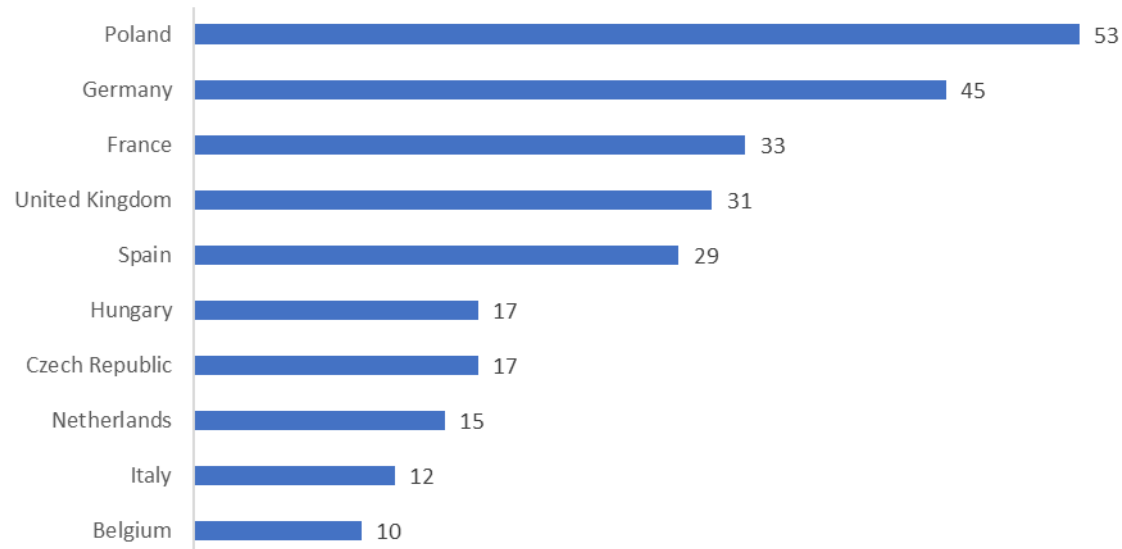
**Share of green-field projects:** 59%

**Percentage of investment projects in Europe (2014 – 2018):** 32%

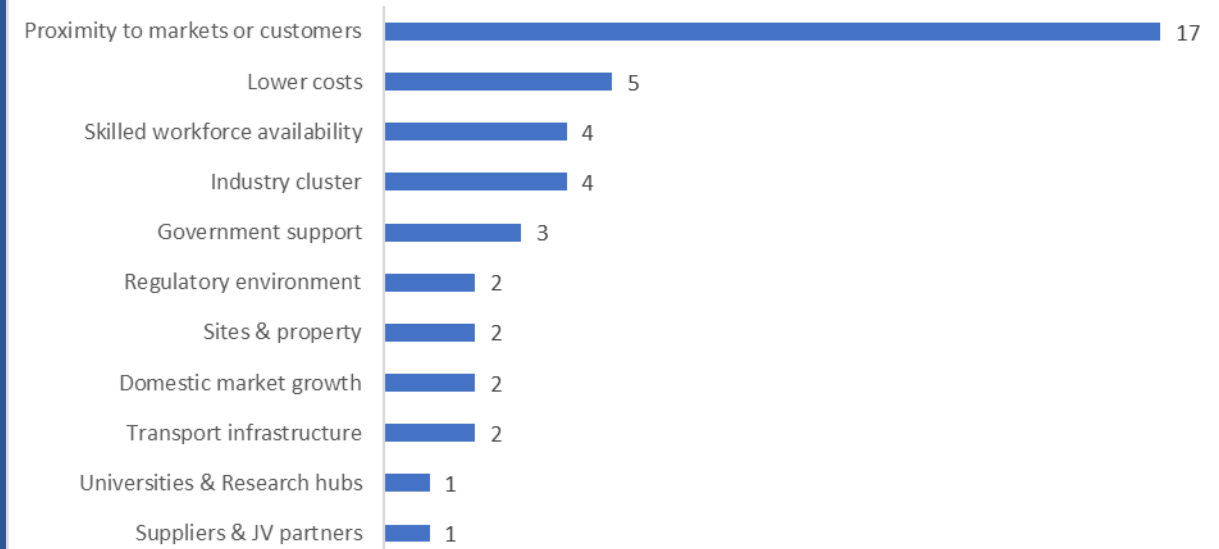
## Number of Project, 2003 - 2018



## Top 10 Destination Countries in Europe, 2003 - 2018



## Motives & Determinants, Europe 2003 - 2018



## SUB-SECTOR: ARTIFICIAL & SYNTHETIC FIBRES

» 0,7% of all project globally, 2014 - 2018

### Sector: plastics

» 7,6% of all projects globally, 2014 – 2018

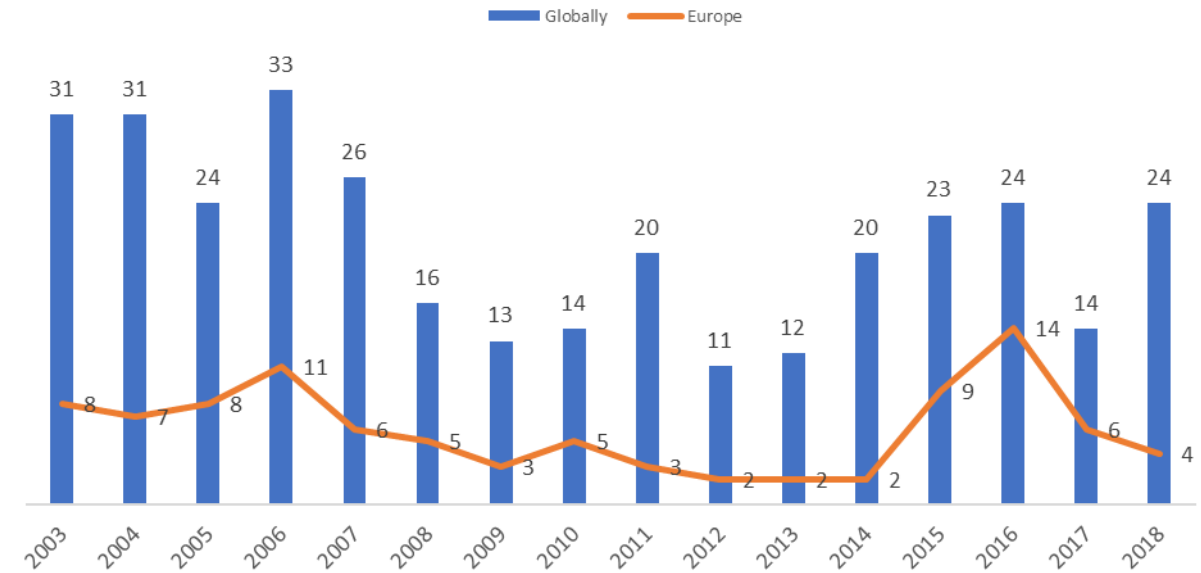
**Clusters:** agribusiness; construction; consumer goods; environmental technology; ICT & electronics; industrial; life science; physical science; transport equipment; wood, apparel & related products

**Number of projects in Lithuania: 0**

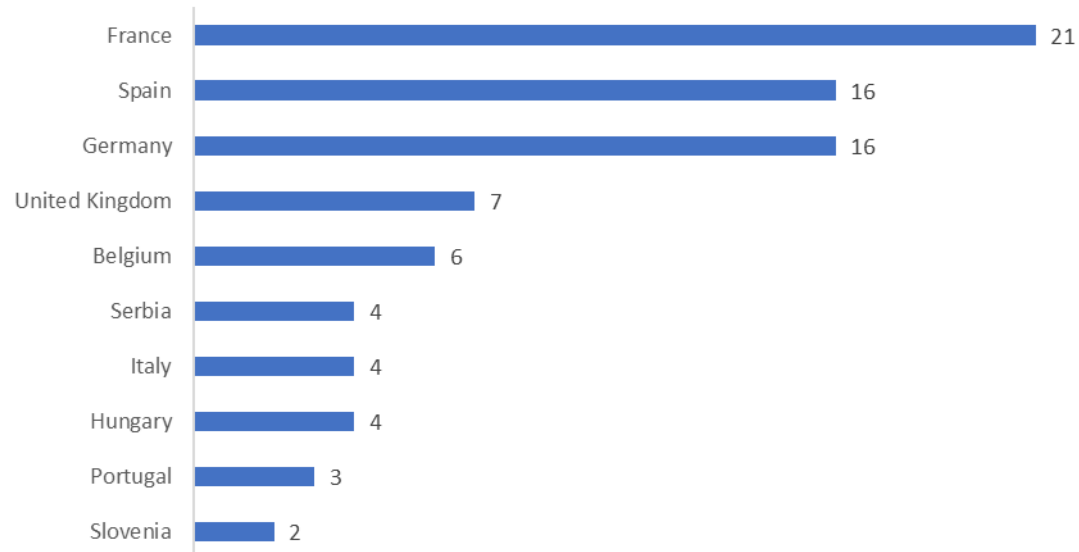
**Share of green-field projects: 47%**

**Percentage of investment projects in Europe (2014 – 2018): 24%**

### Number of Projects, 2003 - 2018



### Top 10 Destination Countries in Europe, 2003 - 2018



## Motives & Determinants, Europe 2003 – 2018

- Transport infrastructure
- Proximity to markets or customers

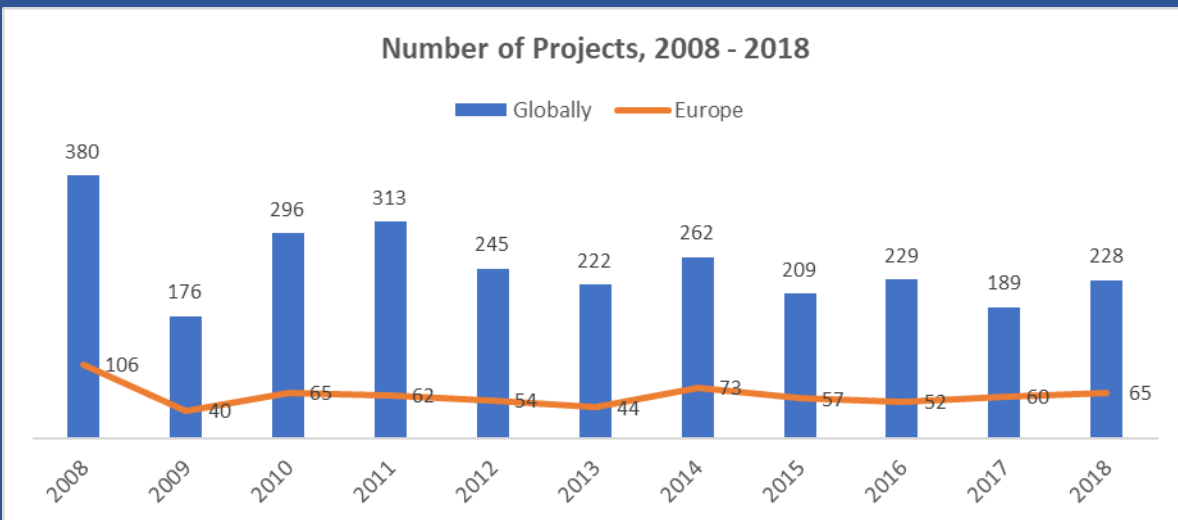
# METALS

## In the last 10 years (2008 – 2018):

- Number of projects globally: 2 749
- Number of projects in Europe: 678
- 25% of all investment projects in this sector happened in Europe\*

## In the last 4 years (2014 – 2018):

- 7,4% of all investment projects happened in this sector



### Top10 destination\*\* countries globally

China (500)  
 United States (464)  
 Mexico (218)  
 India (213)  
 Vietnam (146)  
 Brazil (134)  
 France (131)  
 Poland (122)  
 Thailand (120)  
 Russia (112)

### Top10 destination countries, Europe

France (131)  
 Poland (122)  
 Germany (104)  
 Romania (89)  
 United Kingdom (86)  
 Hungary (69)  
 Slovakia (64)  
 Spain (57)  
 Czech Republic (47)  
 Belgium (35)

### Top10 investing\*\* countries globally

Japan (592)  
 United States (406)  
 Germany (333)  
 United Kingdom (228)  
 China (185)  
 Luxembourg (177)  
 Canada (174)  
 Italy (163)  
 Spain (160)  
 South Korea (144)

### Top10 investing countries, Europe

Germany (333)  
 United Kingdom (228)  
 Italy (163)  
 Spain (160)  
 Sweden (114)  
 France (86)  
 Netherlands (81)  
 Finland (78)  
 Norway (71)  
 Switzerland (70)

\*In total, globally and in all sectors, between 2008 and 2018, 28% of all investment projects happened in Europe

\*\* Based on number of investment projects in the sector

## SUB-SECTOR: STEEL PRODUCTS

» 1,5% of all project globally, 2014 - 2018

### Sector: metals

» 7,4% of all projects globally, 2014 – 2018

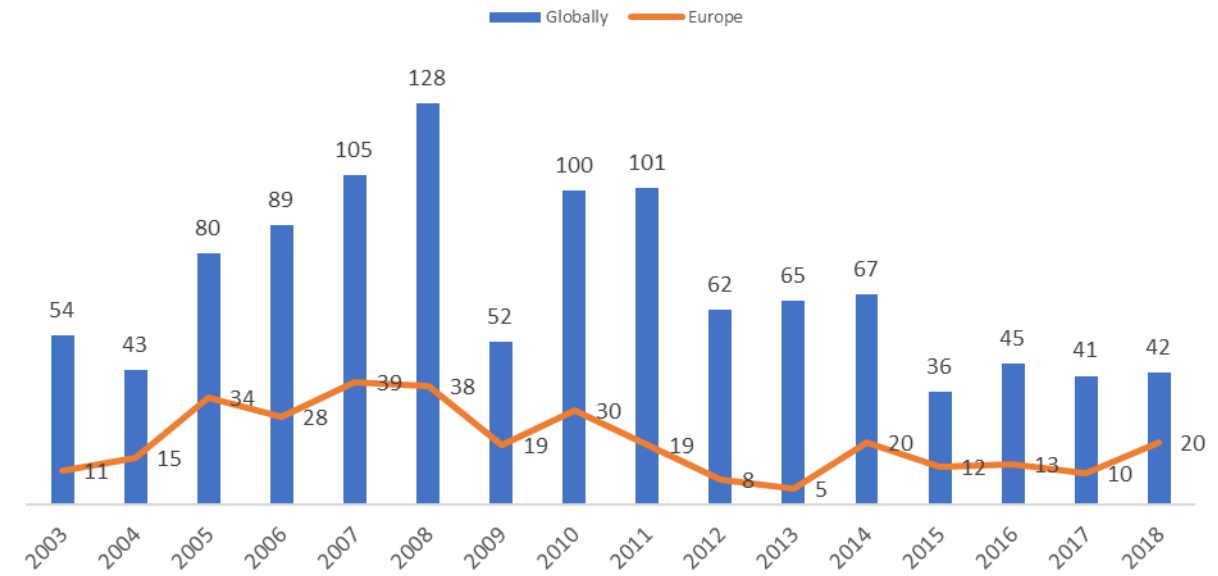
**Clusters:** agribusiness; construction; consumer goods; energy; environmental technology; ICT & electronics; industrial; life science; physical science; transport equipment; transportation & warehousing

**Number of projects in Lithuania:** 4 (2003; 2007; 2008; 2009)

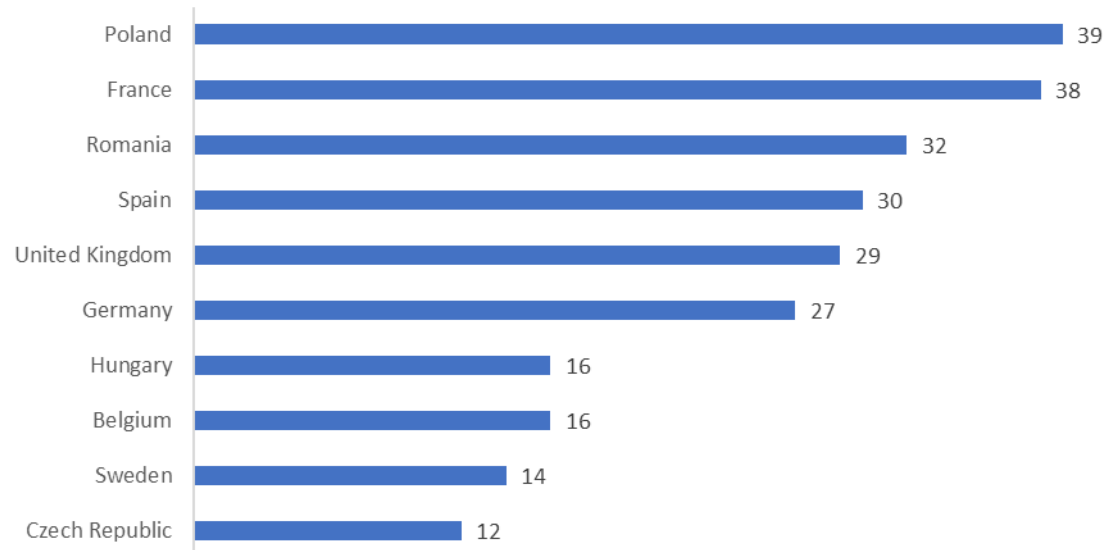
**Share of green-field projects:** 62%

**Percentage of investment projects in Europe (2014 – 2018):** 32%

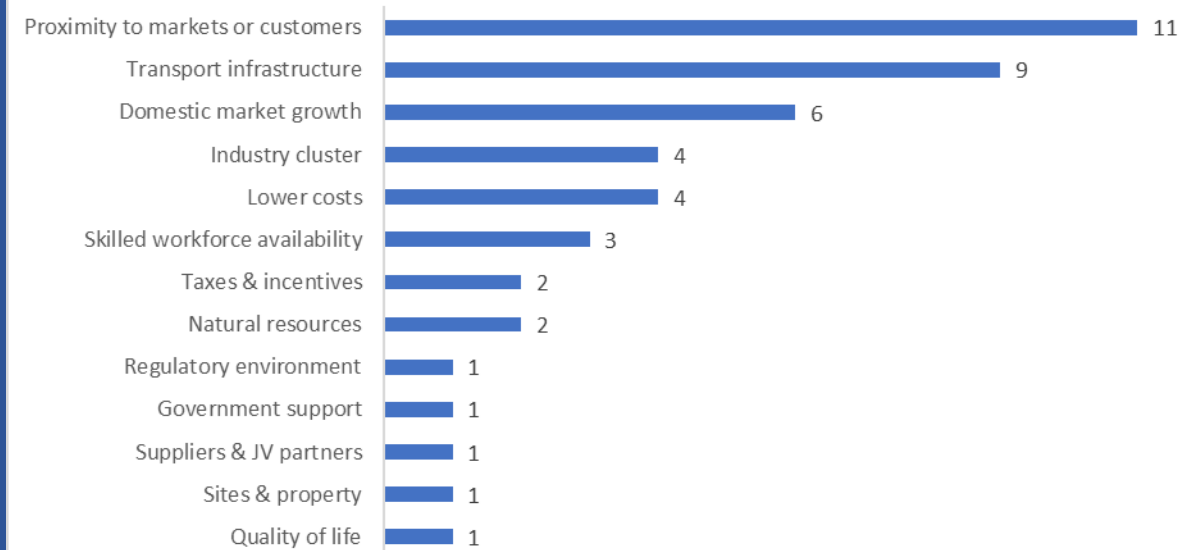
## Number of Projects, 2003 - 2018



## Top 10 Destination Countries in Europe, 2003 - 2018



## Motives & Determinants, Europe 2003 - 2018



## SUB-SECTOR: OTHER FABRICATED METAL PRODUCTS

» 1,5% of all project globally, 2014 - 2018

### Sector: metals

» 7,4% of all projects globally, 2014 – 2018

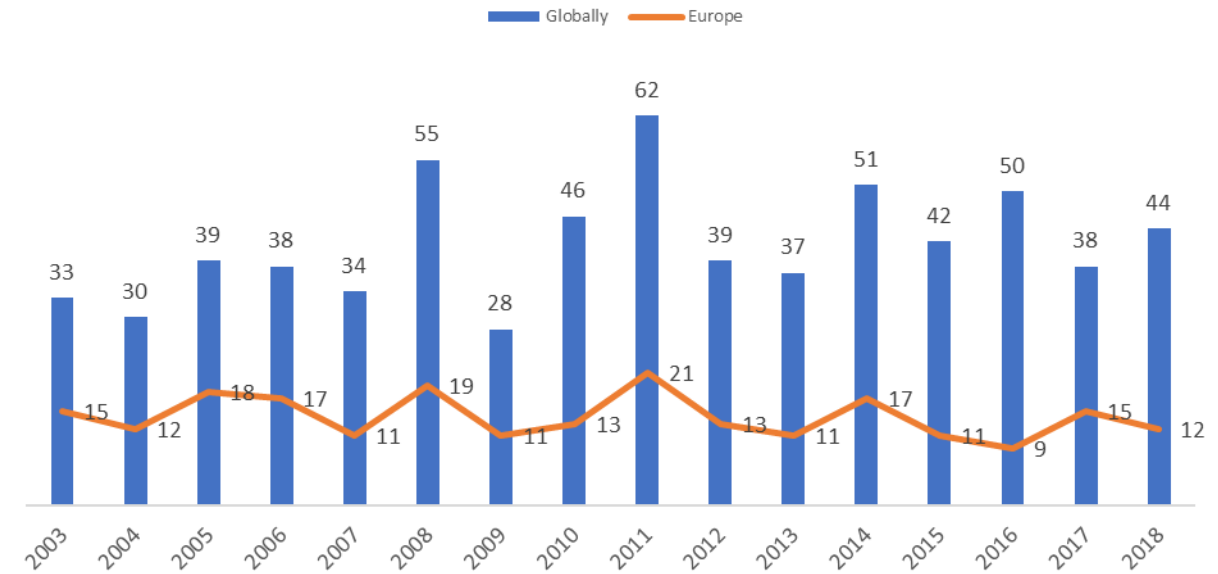
**Clusters:** agribusiness; construction; consumer goods; energy; environmental technology; ICT & electronics; industrial; life science; physical science; retail trade; tourism; transport equipment; transportation & warehousing; wood, apparel & related products

**Number of projects in Lithuania:** 12 (2005; 2009 (2); 2012; 2014 (2); 2015; 2016 (2); 2018 (2))

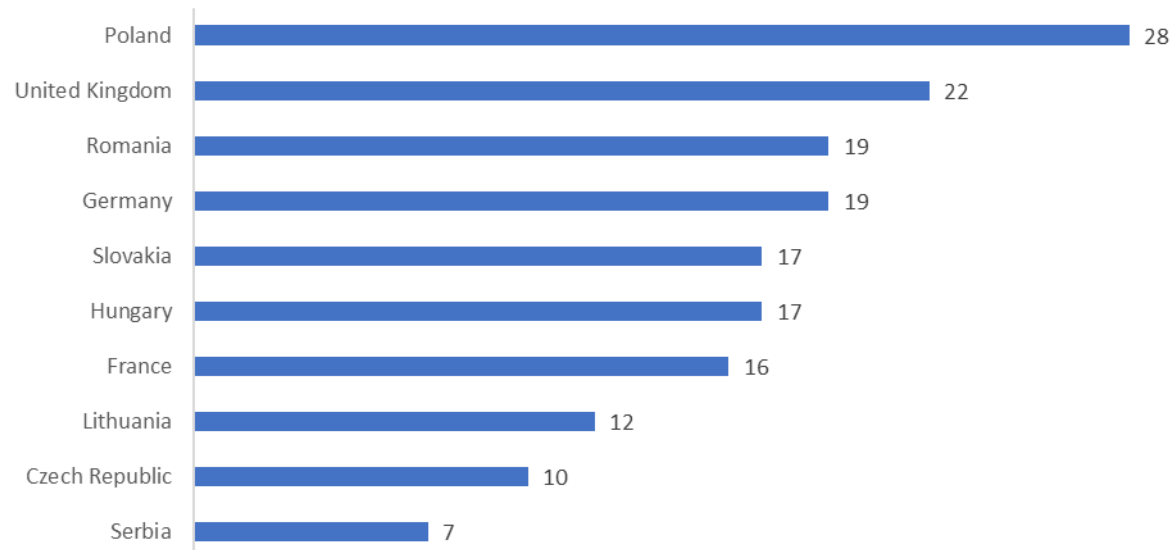
**Share of green-field projects:** 68%

**Percentage of investment projects in Europe (2014 – 2018):** 28%

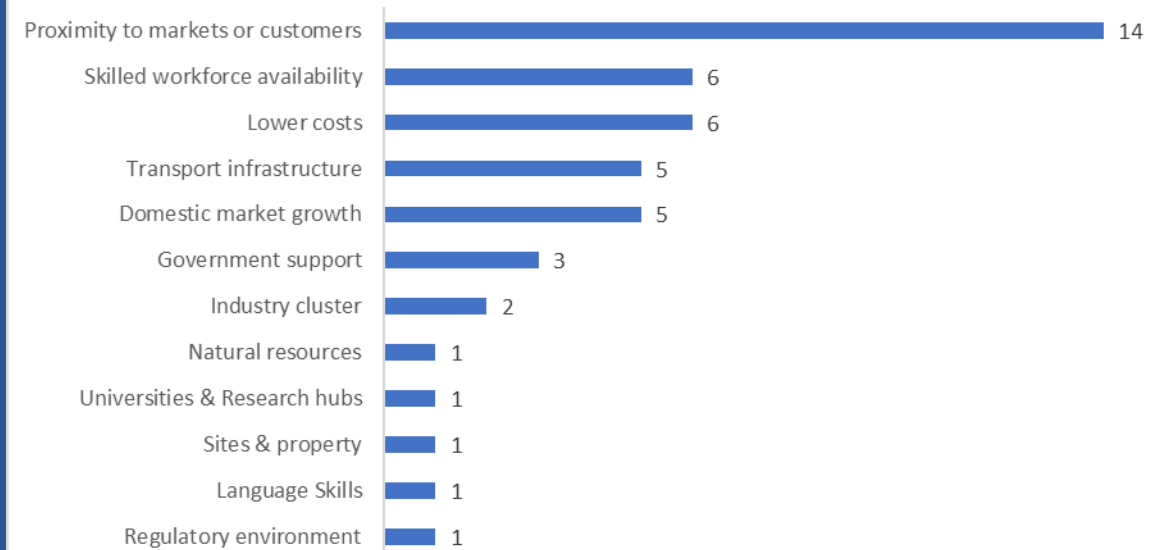
### Number of Projects, 2003 - 2018



### Top 10 Destination Countries in Europe, 2003 - 2018



### Motives & Determinants, Europe 2003 - 2018



## SUB-SECTOR: ALUMINA, ALUMINIUM PRODUCTION & PROCESSING

» 1,3% of all project globally, 2014 - 2018

### Sector: metals

» 7,4% of all projects globally, 2014 – 2018

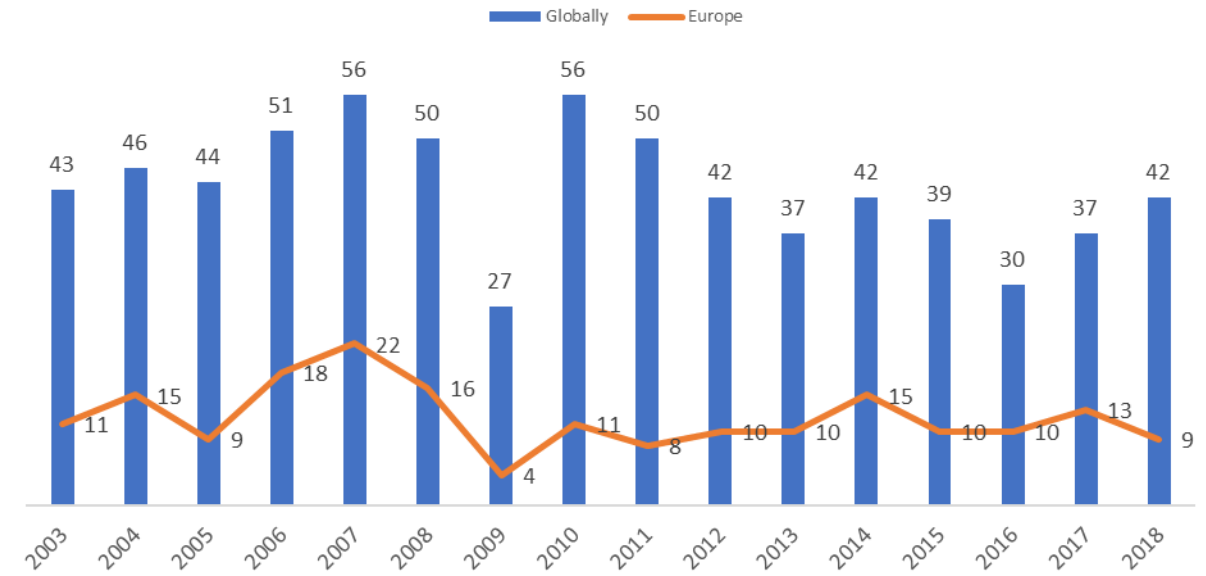
**Clusters:** agribusiness; construction; consumer goods; environmental technology; ICT & electronics; industrial; life science; physical science; transport equipment; transportation & warehousing

**Number of projects in Lithuania:** 1 (2003)

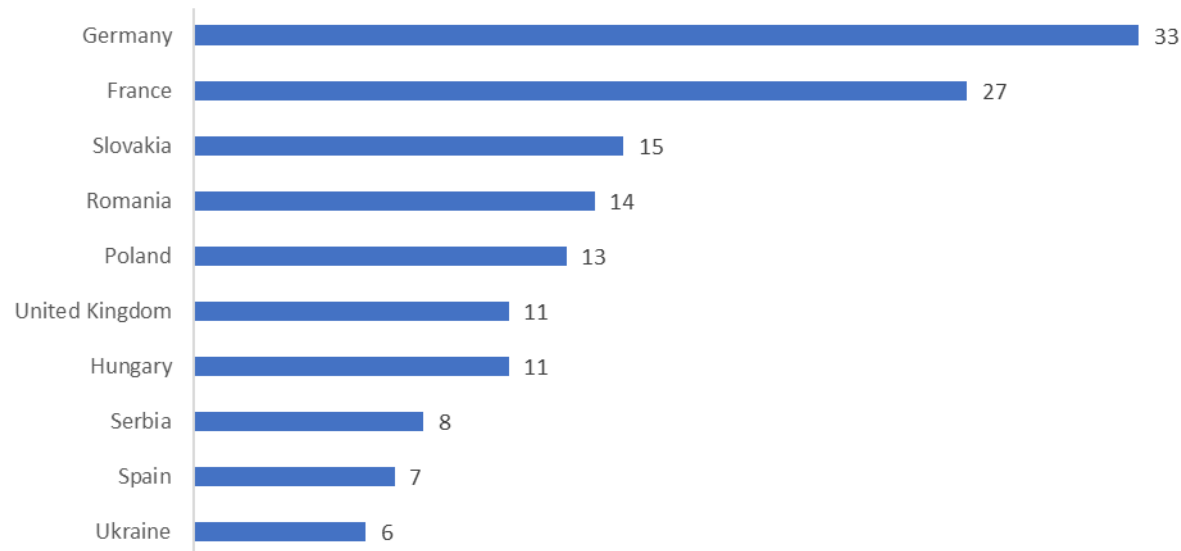
**Share of green-field projects:** 58%

**Percentage of investment projects in Europe (2014 – 2018):** 30%

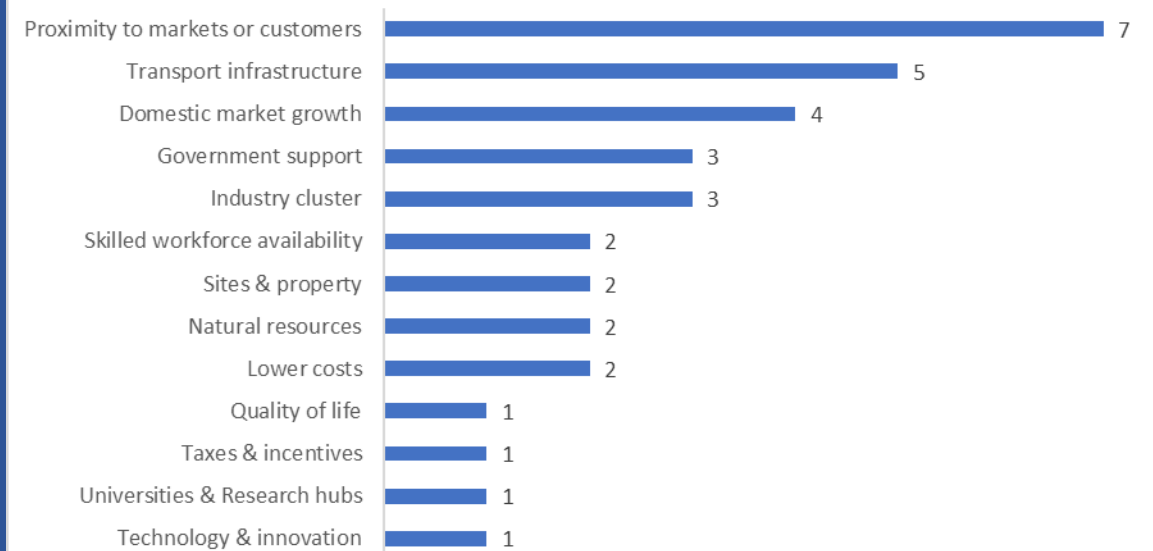
## Number of Projects, 2003 - 2018



## Top 10 Destination Countries in Europe, 2003 - 2018



## Motives & Determinants, Europe 2003 - 2018



## SUB-SECTOR: IRON & STEEL MILLS & FERROALLOY

» 0,4% of all project globally, 2014 - 2018

### Sector: metals

» 7,4% of all projects globally, 2014 – 2018

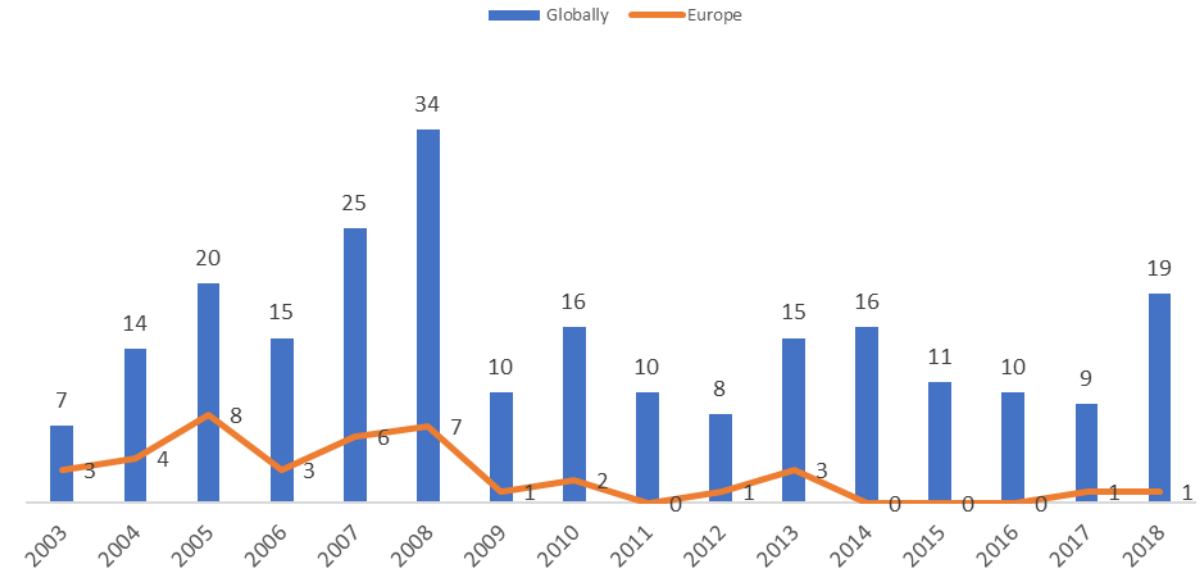
**Clusters:** construction; energy; ICT & electronics; industrial; physical science; transport equipment

**Number of projects in Lithuania: 0**

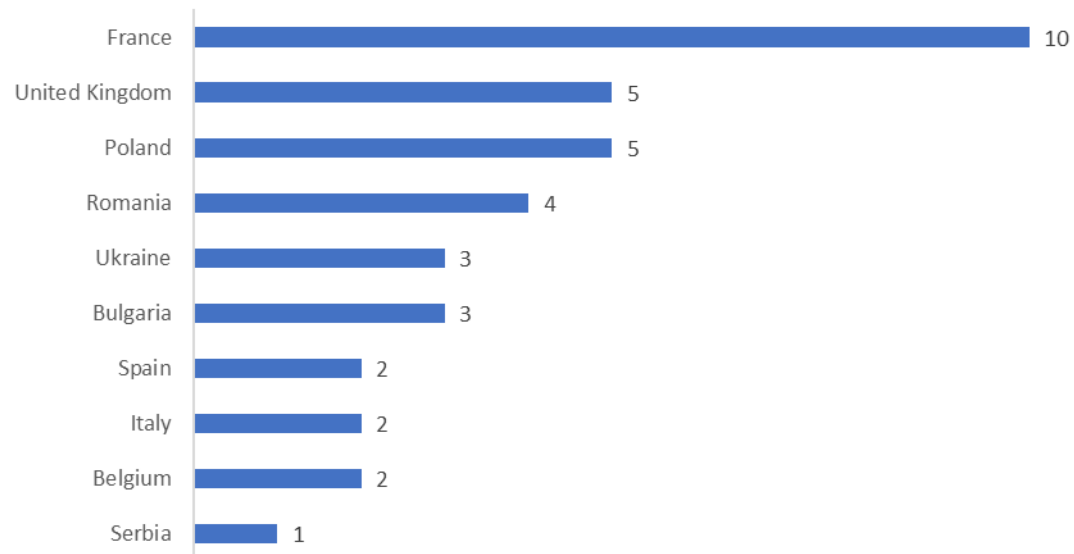
**Share of green-field projects: 61%**

**Percentage of investment projects in Europe (2014 – 2018): 3%**

### Number of Projects, 2003 - 2018



### Top 10 Destination Countries in Europe, 2003 - 2018



## Motives & Determinants, Europe 2003 – 2018

➤ Transport infrastructure

## SUB-SECTOR: ARCHITECTURAL & STRUCTURED METALS

» 0,3% of all project globally, 2014 - 2018

### Sector: metals

» 7,4% of all projects globally, 2014 - 2018

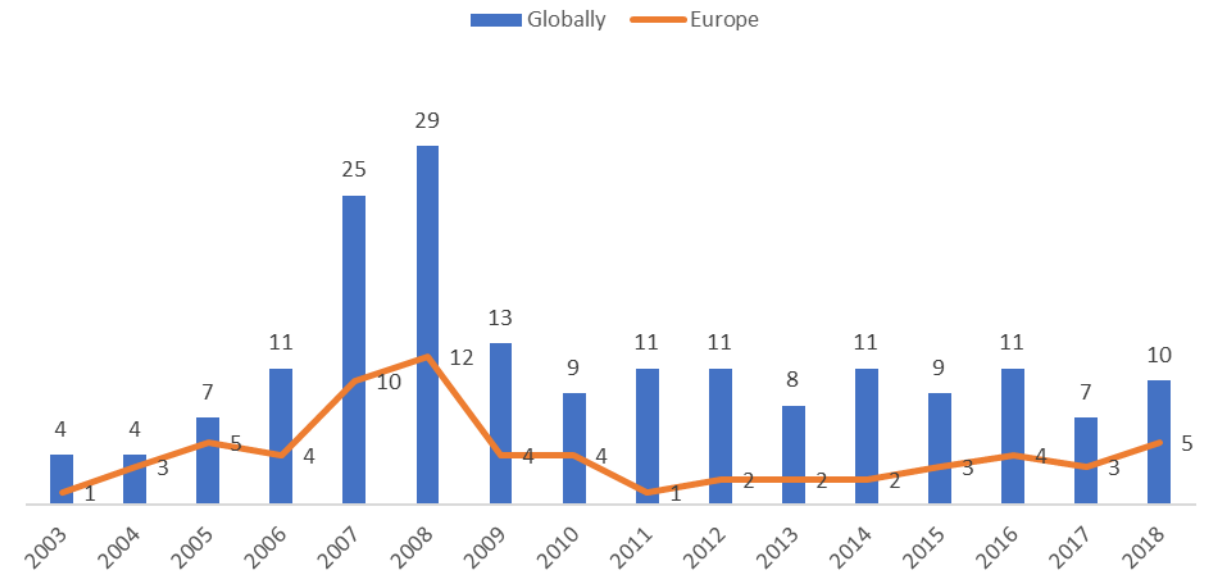
**Clusters:** agribusiness; constructions; consumer goods; energy; environmental technology; industrial; physical science; tourism; transport equipment

**Number of projects in Lithuania:** 5 (2006; 2012; 2013; 2014; 2016)

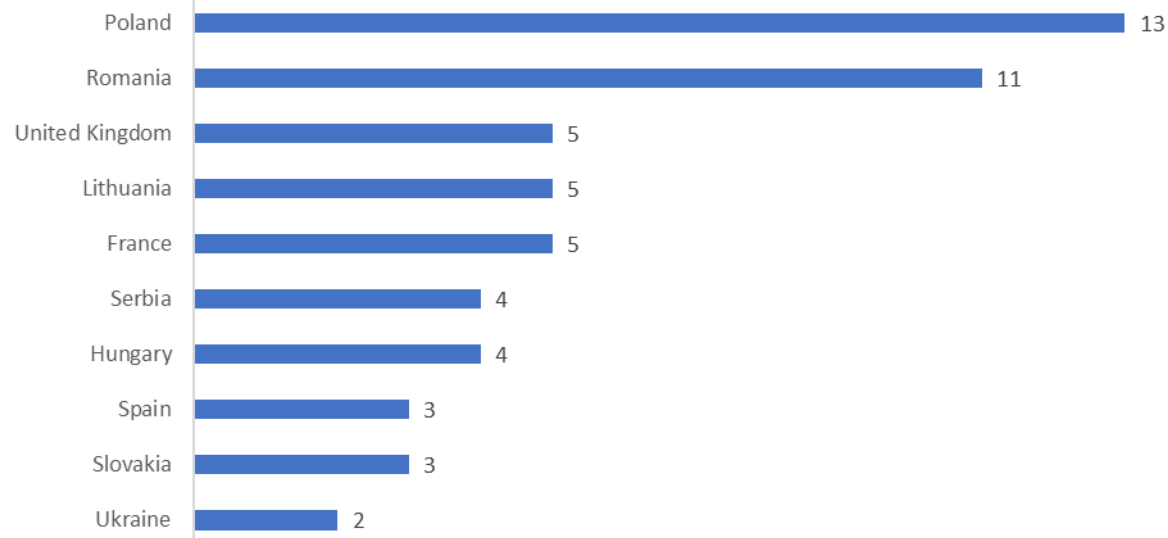
**Share of green-field projects:** 71%

**Percentage of investment projects in Europe (2014 – 2018):** 36%

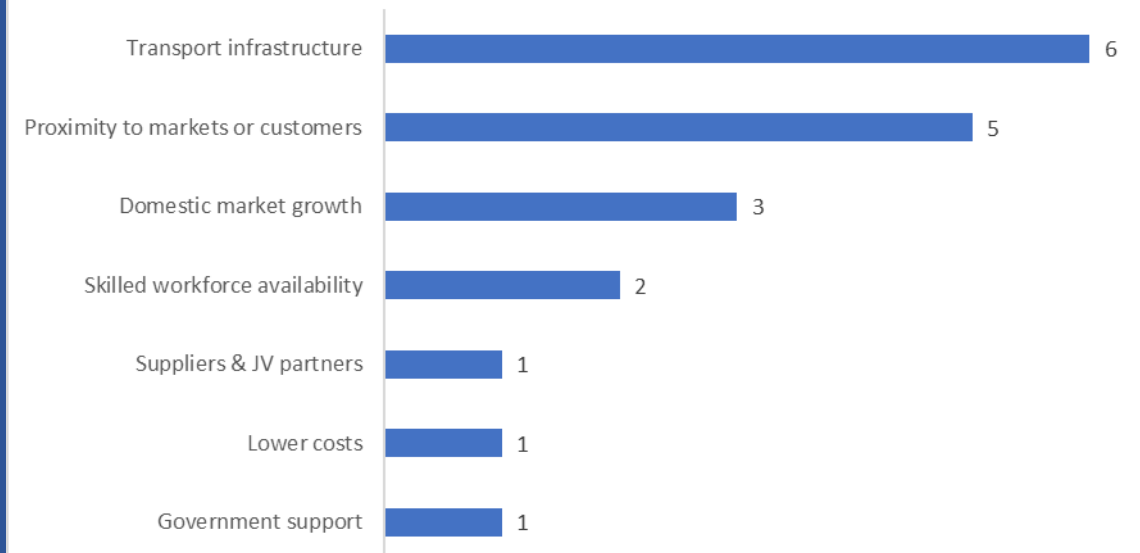
## Number of Projects, 2003 - 2018



## Top 10 Destination Countries in Europe, 2003 - 2018



## Motives & Determinants, Europe 2003 - 2018





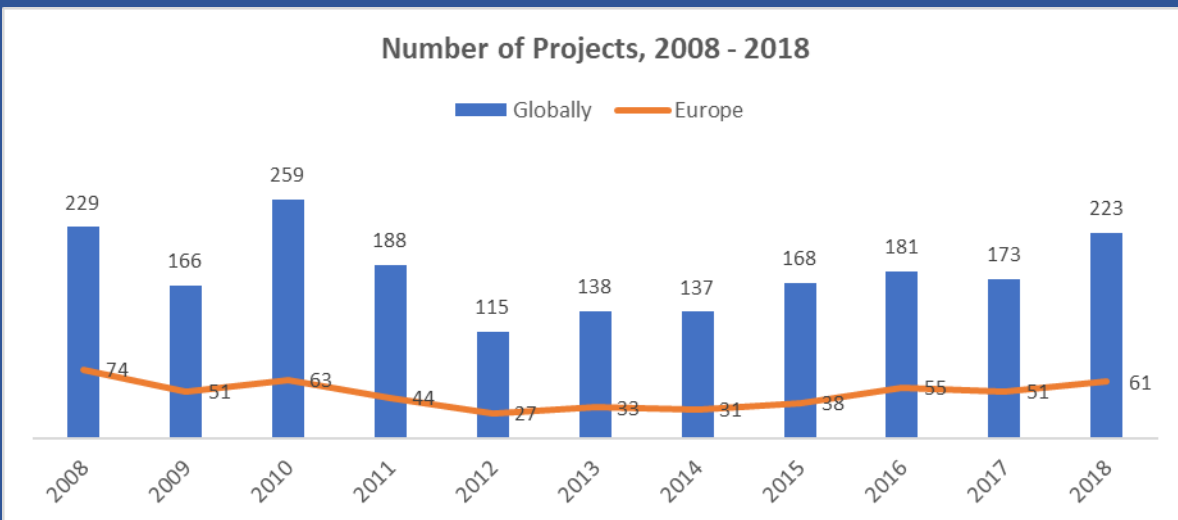
# ELECTRONIC COMPONENTS

## In the last 10 years (2008 – 2018):

- Number of projects globally: 1 977
- Number of projects in Europe: 527
- 27% of all investment projects in this sector happened in Europe\*

## In the last 4 years (2014 – 2018):

- 5,8% of all investment projects happened in this sector



## Top10 destination\*\* countries globally

China (603)  
 United States (202)  
 Mexico (168)  
 India (161)  
 Vietnam (140)  
 Poland (96)  
 Germany (91)  
 Thailand (85)  
 Hungary (83)  
 Brazil (69)

## Top10 destination countries, Europe

Poland (96)  
 Germany (91)  
 Hungary (83)  
 Romania (66)  
 Czech Republic (55)  
 United Kingdom (50)  
 Slovakia (45)  
 France (44)  
 Serbia (41)  
 Spain (33)

## Top10 investing\*\* countries globally

United States (467)  
 Japan (448)  
 Germany (342)  
 Taiwan (205)  
 South Korea (186)  
 France (153)  
 China (124)  
 Switzerland (100)  
 Spain (76)  
 United Kingdom (76)

## Top10 investing countries, Europe

Germany (342)  
 France (153)  
 Switzerland (100)  
 Spain (76)  
 United Kingdom (76)  
 Netherlands (73)  
 Austria (48)  
 Italy (47)  
 Finland (45)  
 Sweden (38)

\*In total, globally and in all sectors, between 2008 and 2018, 28% of all investment projects happened in Europe

\*\* Based on number of investment projects in the sector

## SUB-SECTOR: ALL OTHER ELECTRICAL EQUIPMENT & COMPONENTS

» 2,9% of all project globally, 2014 - 2018

**Sector:** electronic components

» 5,8% of all projects globally, 2014 – 2018

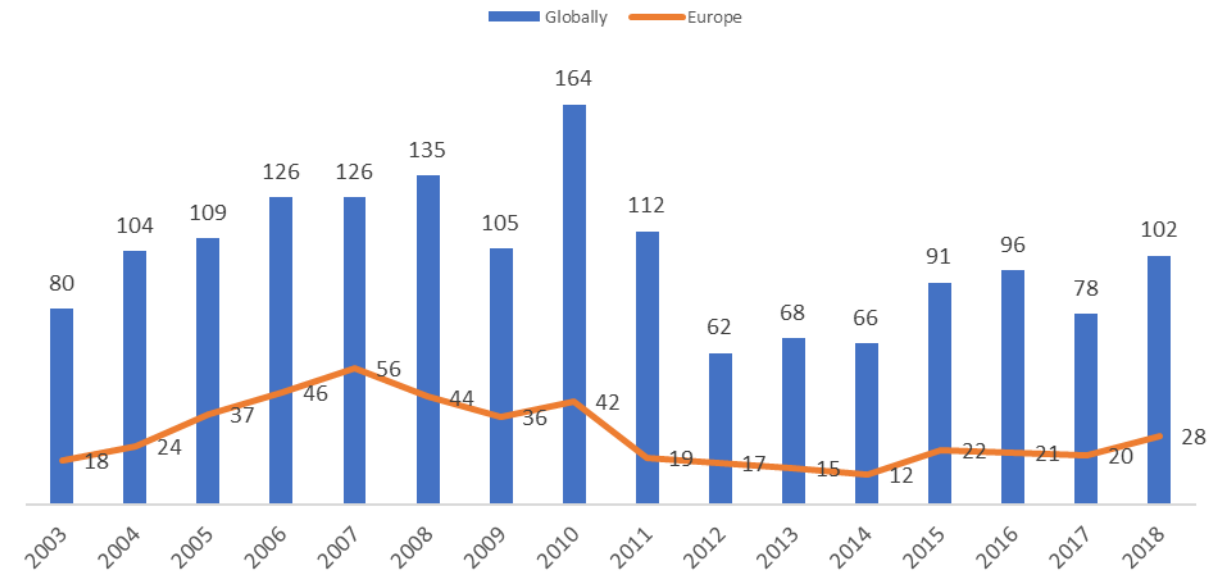
**Clusters:** construction; consumer goods; creative industries; energy; environmental technology; financial services; ICT & electronics; industrial; life science; professional services; transport equipment; wood, apparel & related products

**Number of projects in Lithuania:** 7 (2003 (2); 2012 (1); 2014 (2); 2017 (1); 2018 (2))

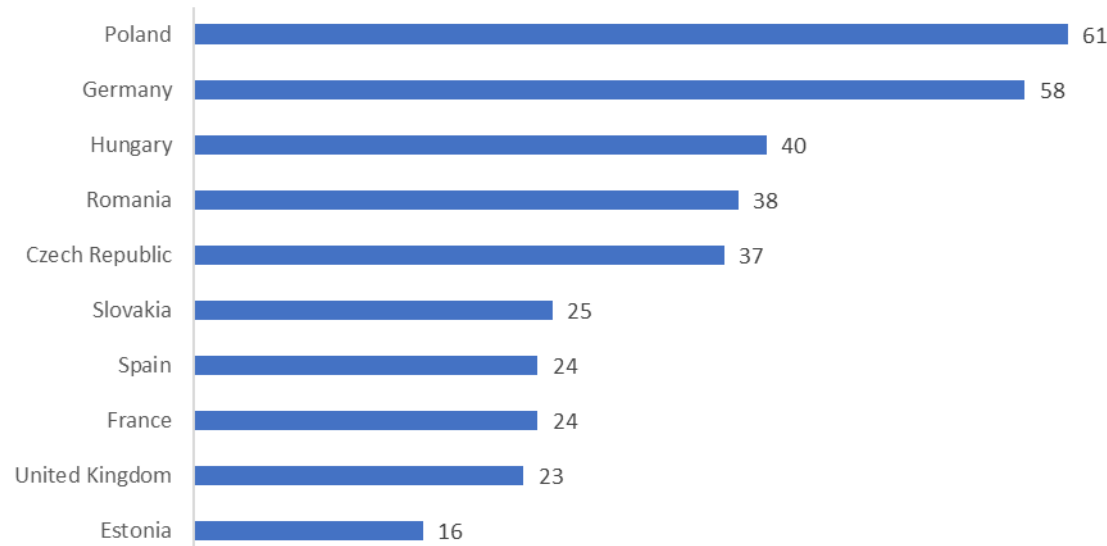
**Share of green-field projects:** 65%

**Percentage of investment projects in Europe (2014 – 2018):** 24%

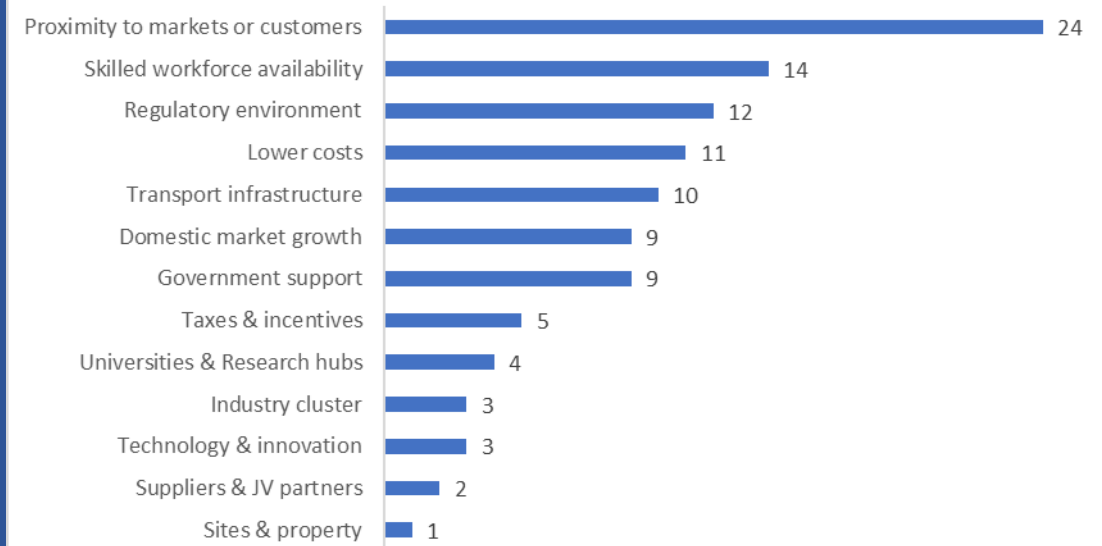
### Number of Projects, 2003 - 2018



### Top 10 Destination Countries in Europe, 2003 - 2018



### Motives & Determinants, Europe 2003 - 2018



## SUB-SECTOR: COMMUNICATION & ENERGY WIRES & CABLES

» 1% of all project globally, 2014 - 2018

**Sector:** electronic components

» 5,8% of all projects globally, 2014 - 2018

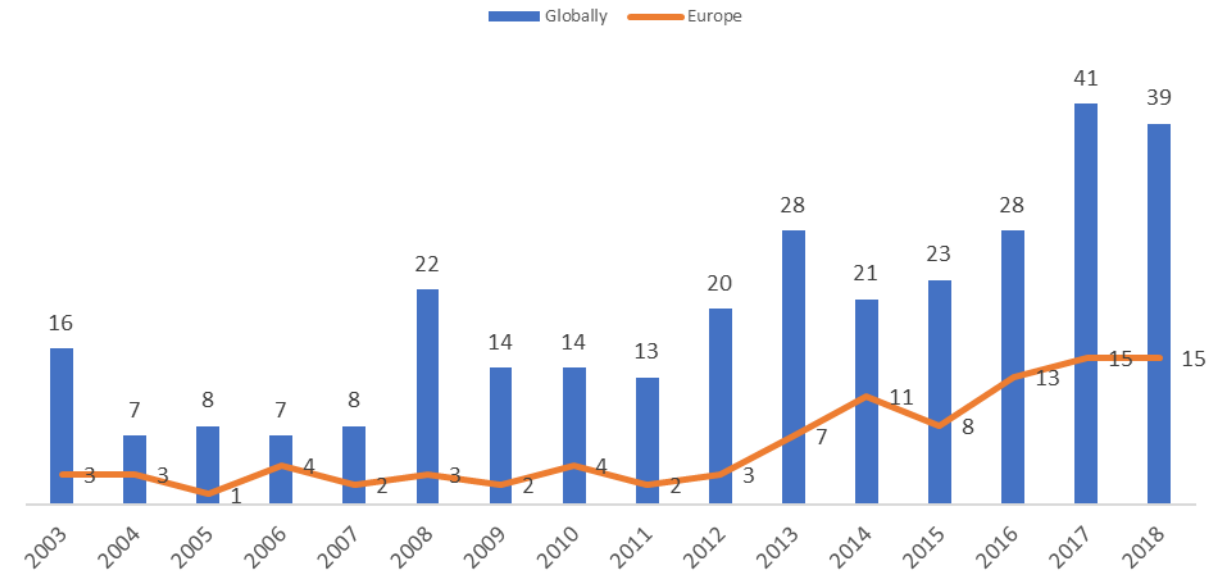
**Clusters:** construction; energy; environmental technology; ICT & electronics; industrial; transport equipment

**Number of projects in Lithuania:** 1 (2018)

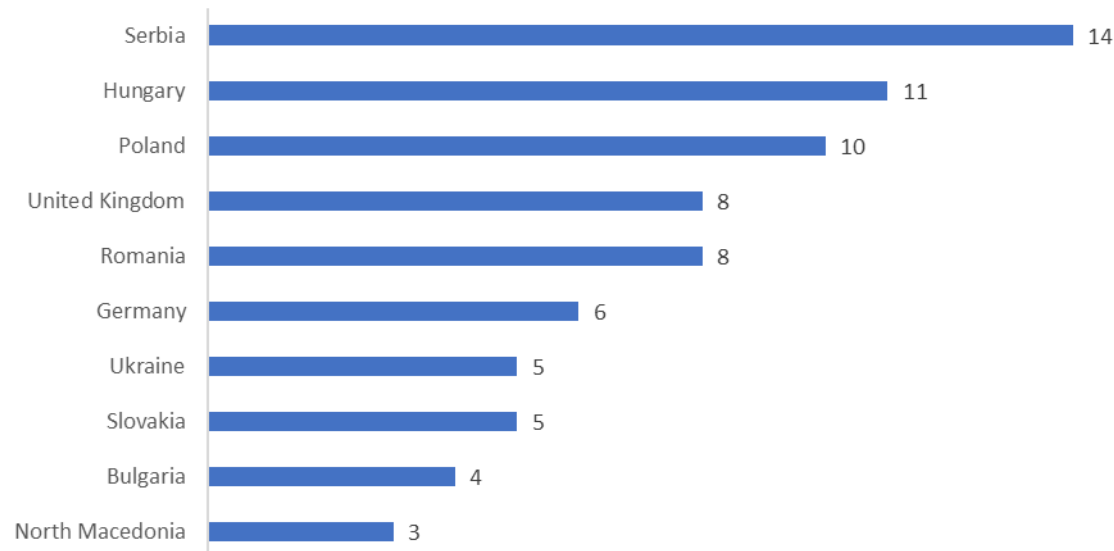
**Share of green-field projects:** 63%

**Percentage of investment projects in Europe (2014 – 2018):** 41%

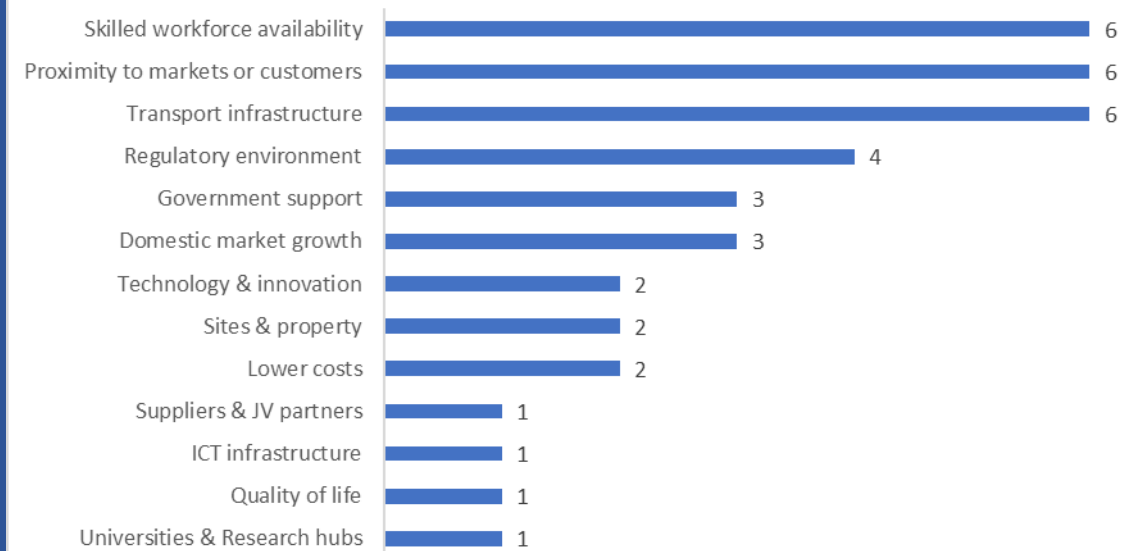
### Number of Projects, 2003 - 2018



### Top 10 Destination Countries in Europe, 2003 - 2018



### Motives & Determinants, Europe 2003 - 2018



## SUB-SECTOR: BATTERIES

» 0,7% of all project globally, 2014 - 2018

**Sector:** electronic components

» 5,8% of all projects globally, 2014 – 2018

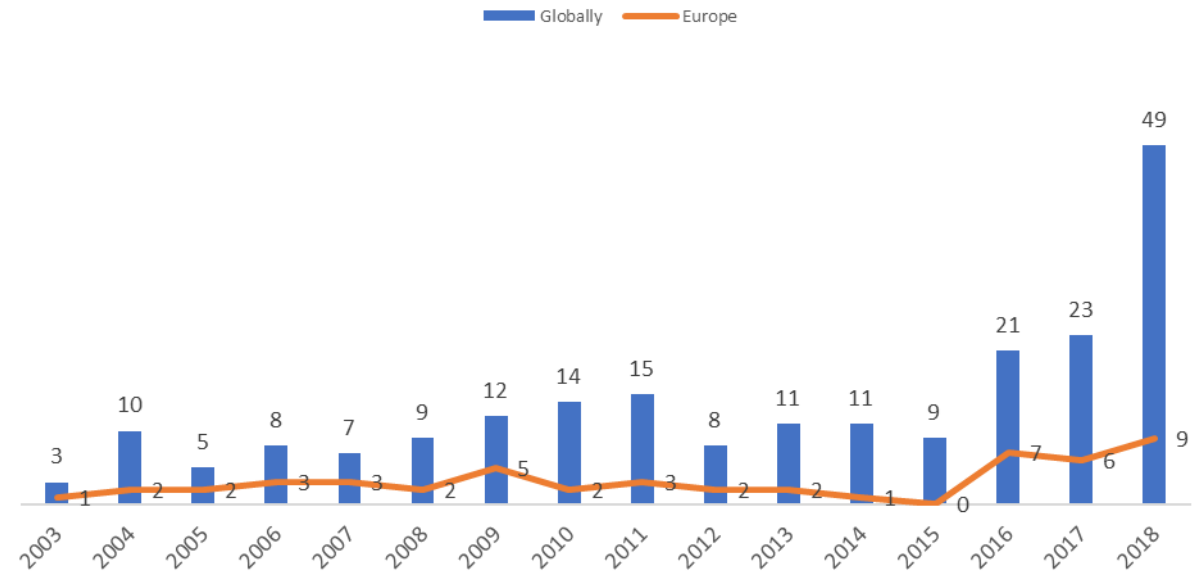
**Clusters:** consumer goods; energy; environmental technology; OCT & electronics; industrial; transport equipment

**Number of projects in Lithuania:** 1 (2010)

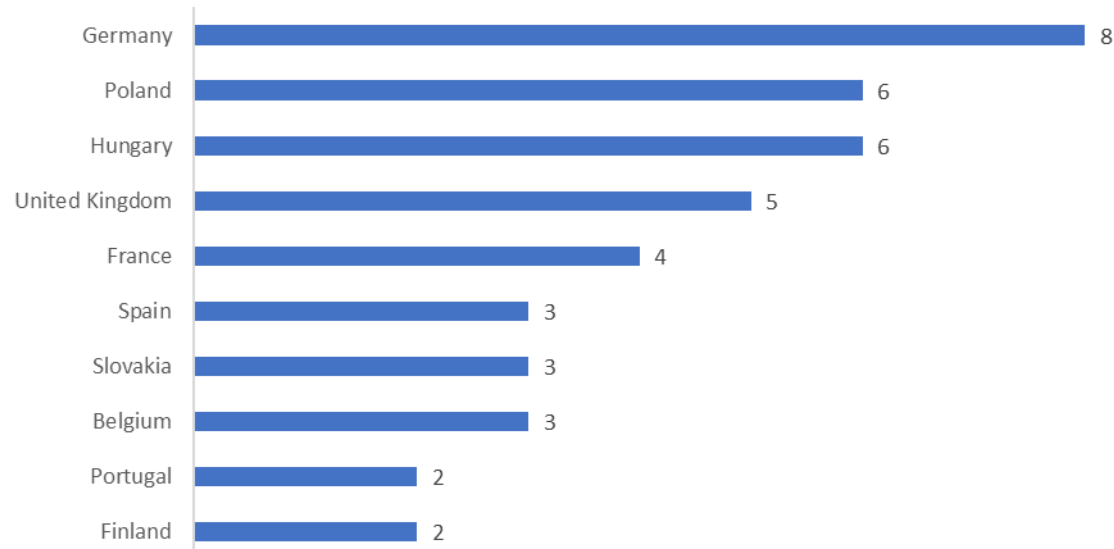
**Share of green-field projects:** 70%

**Percentage of investment projects in Europe (2014 – 2018):** 20%

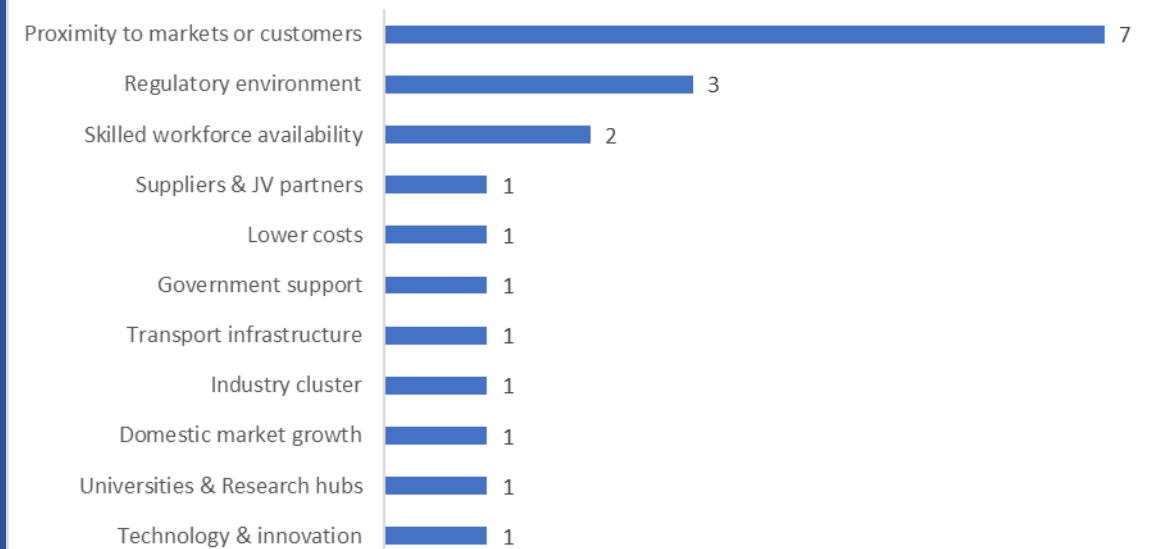
## Number of Projects, 2003 - 2018



## Top 10 Destination Countries in Europe, 2003 - 2018



## Motives & Determinants, Europe 2003 - 2018



## SUB-SECTOR: AUDIO & VIDEO EQUIPMENT

» 0,5% of all project globally, 2014 - 2018

**Sector:** consumer electronics; electronic components

» 1,2% & 5,8% of all projects globally, 2014 - 2018

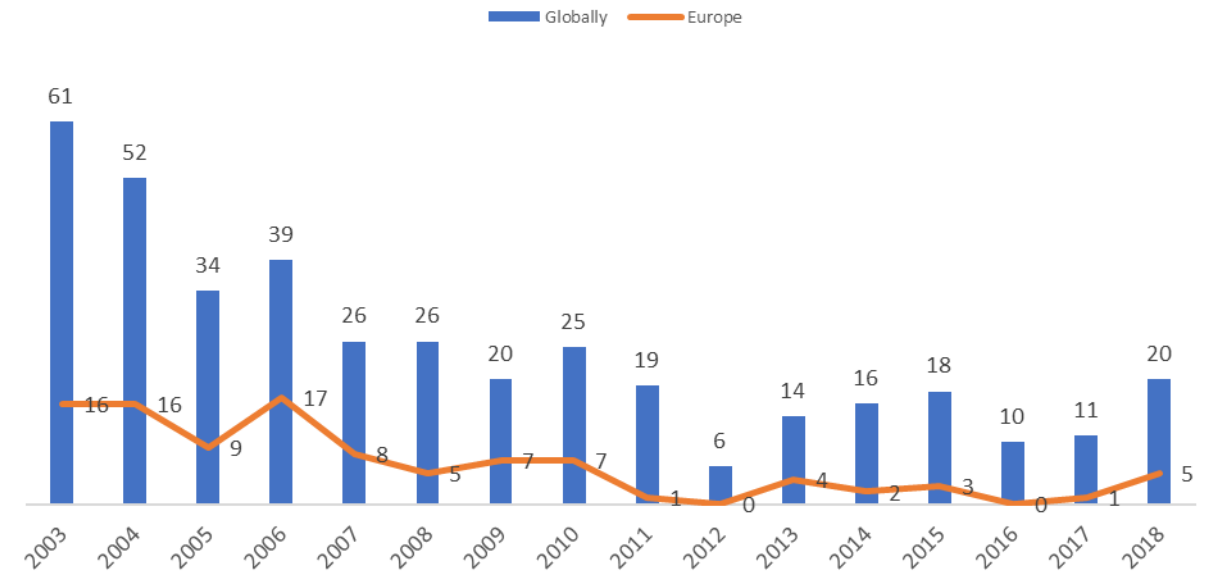
**Clusters:** consumer goods; ICT & electronics; industrial; retail trade; transport equipment

**Number of projects in Lithuania:** 1 (2004)

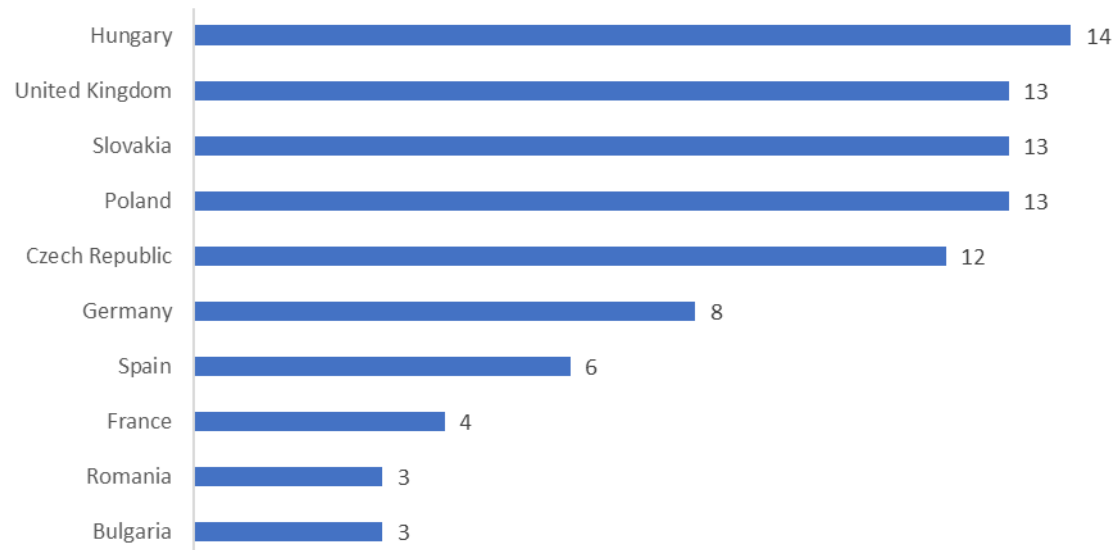
**Share of green-field projects:** 70%

**Percentage of investment projects in Europe (2014 – 2018):** 15%

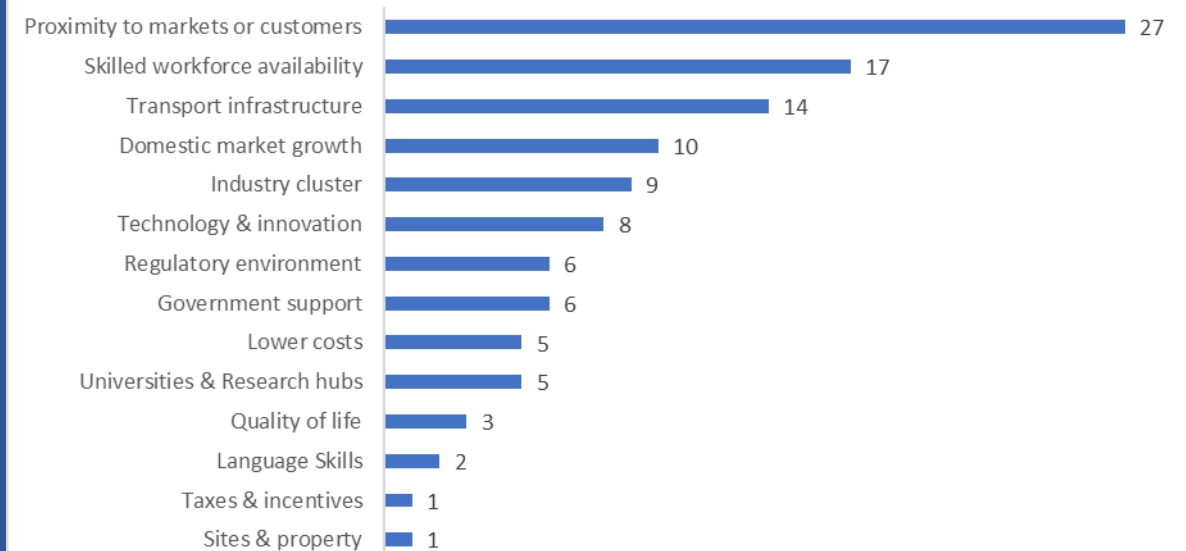
### Number of Projects, 2003 - 2018



### Top 10 Destination Countries in Europe, 2003 - 2018



### Motives & Determinants, Europe 2003 - 2018



## SUB-SECTOR: ELECTRIC LIGHTING EQUIPMENT

» 0,4% of all project globally, 2014 - 2018

**Sector:** electronic components

» 5,8% of all projects globally, 2014 - 2018

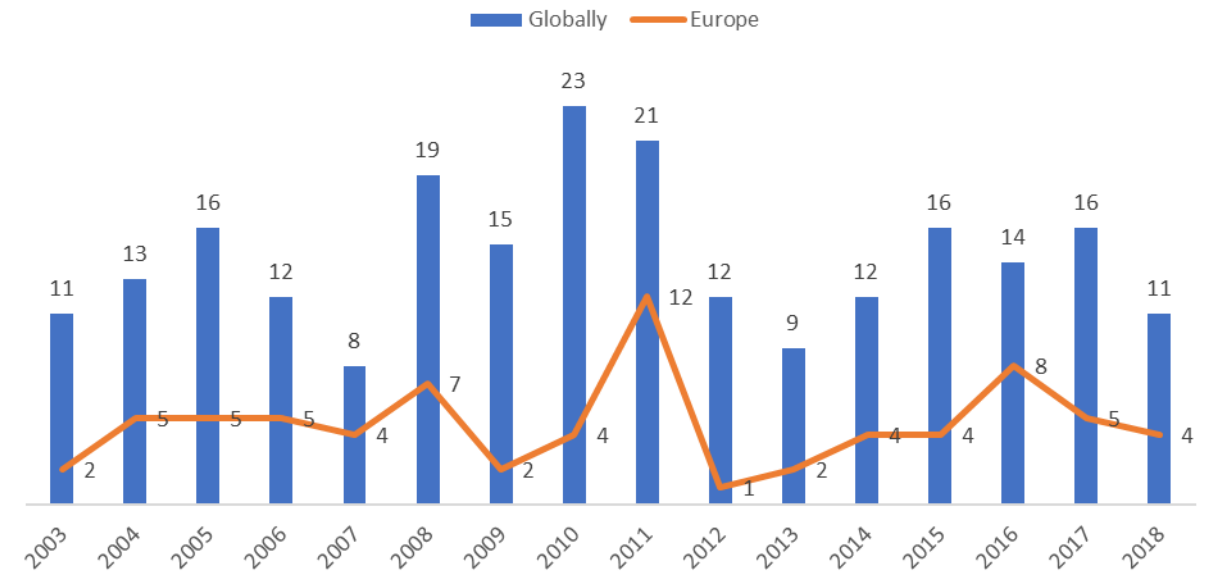
**Clusters:** consumer goods; environmental technology; ICT & electronics;  
industrial; transport equipment; transportation & warehousing

**Number of projects in Lithuania:** 4 (2011 (2); 2014 (2); 2017)

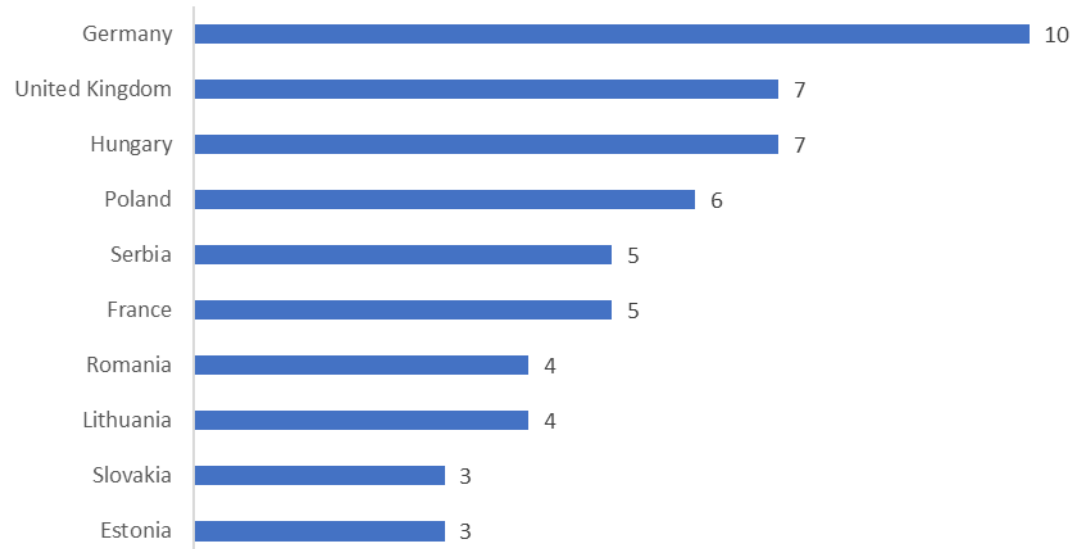
**Share of green-field projects:** 71%

**Percentage of investment projects in Europe (2014 – 2018):** 36%

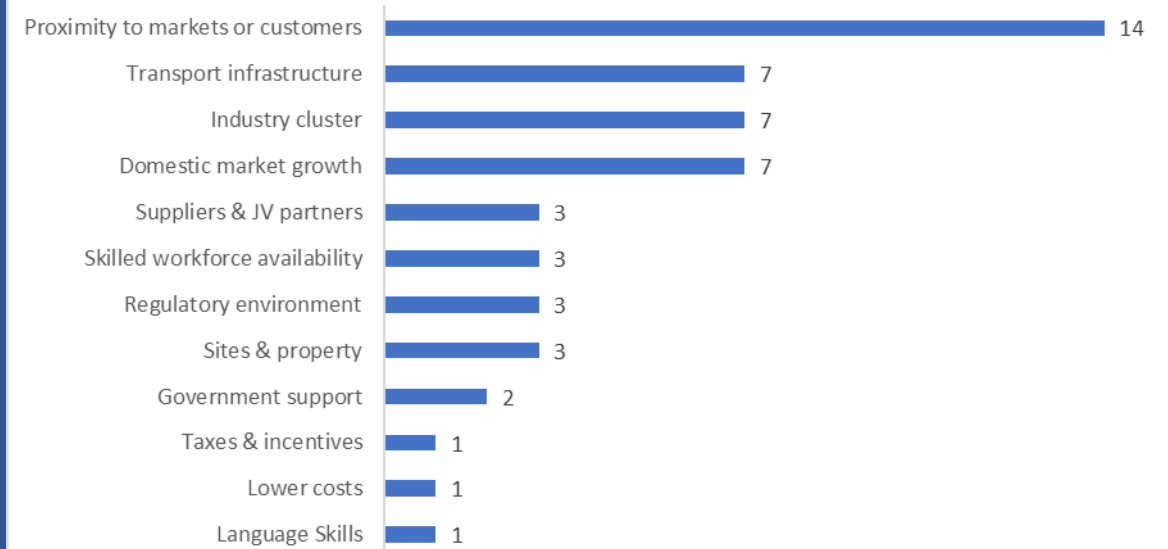
### Number of Projects, 2003 - 2018



### Top 10 Destination Countries in Europe, 2003 - 2018



### Motives & Determinants, Europe 2003 - 2018



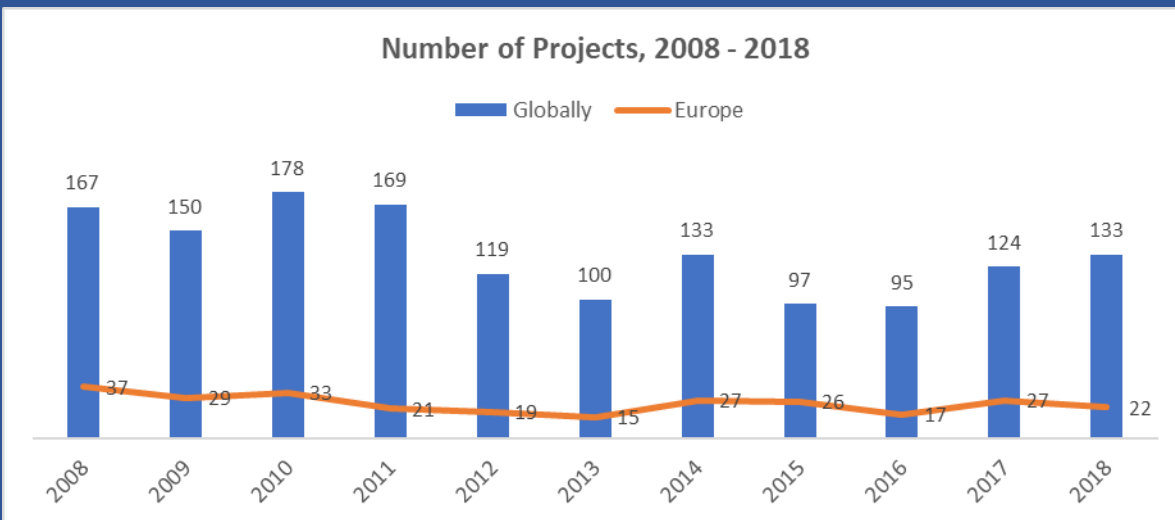
# AUTOMOTIVE OEM

## In the last 10 years (2008 – 2018):

- Number of projects globally: 1 465
- Number of projects in Europe: 273
- 19% of all investment projects in this sector happened in Europe\*

## In the last 4 years (2014 – 2018):

- 3,8% of all investment projects happened in this sector



## Top10 destination\*\* countries globally

China (247)  
 United States (186)  
 India (176)  
 Russia (143)  
 Brazil (120)  
 Mexico (113)  
 Thailand (72)  
 Spain (69)  
 United Kingdom (67)  
 Turkey (59)

## Top10 destination countries, Europe

Spain (69)  
 United Kingdom (67)  
 Belgium (41)  
 Poland (40)  
 France (34)  
 Germany (23)  
 Czech Republic (22)  
 Slovakia (22)  
 Hungary (19)  
 Romania (15)

## Top10 investing\*\* countries globally

Japan (500)  
 Germany (421)  
 United States (322)  
 China (218)  
 France (130)  
 South Korea (119)  
 Sweden (82)  
 India (76)  
 Italy (71)  
 Russia (60)

## Top10 investing countries, Europe

Germany (421)  
 France (130)  
 Sweden (82)  
 Italy (71)  
 United Kingdom (42)  
 Belarus (14)  
 Ukraine (9)  
 Spain (8)  
 Austria (7)  
 Netherlands (6)

\*In total, globally and in all sectors, between 2008 and 2018, 28% of all investment projects happened in Europe

\*\* Based on number of investment projects in the sector

## SUB-SECTOR: AUTOMOBILES

» 2,4% of all project globally, 2014 - 2018

### Sector: automotive OEM

» 3,8% of all projects globally, 2014 - 2018

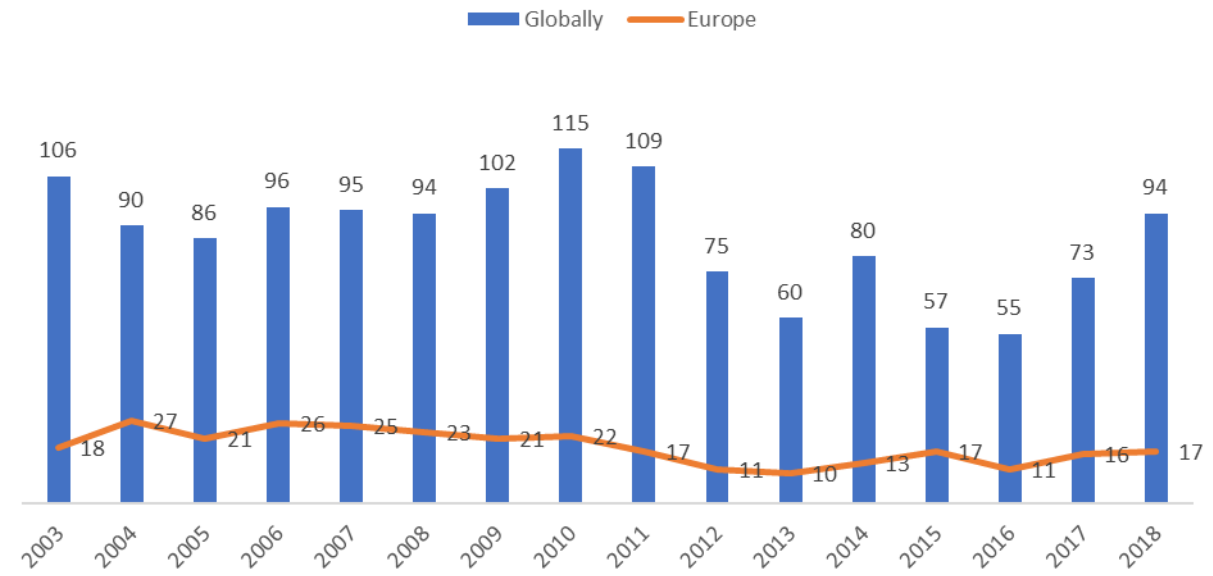
**Clusters:** transport equipment; transportation & warehousing

**Number of projects in Lithuania:** 1 (2003)

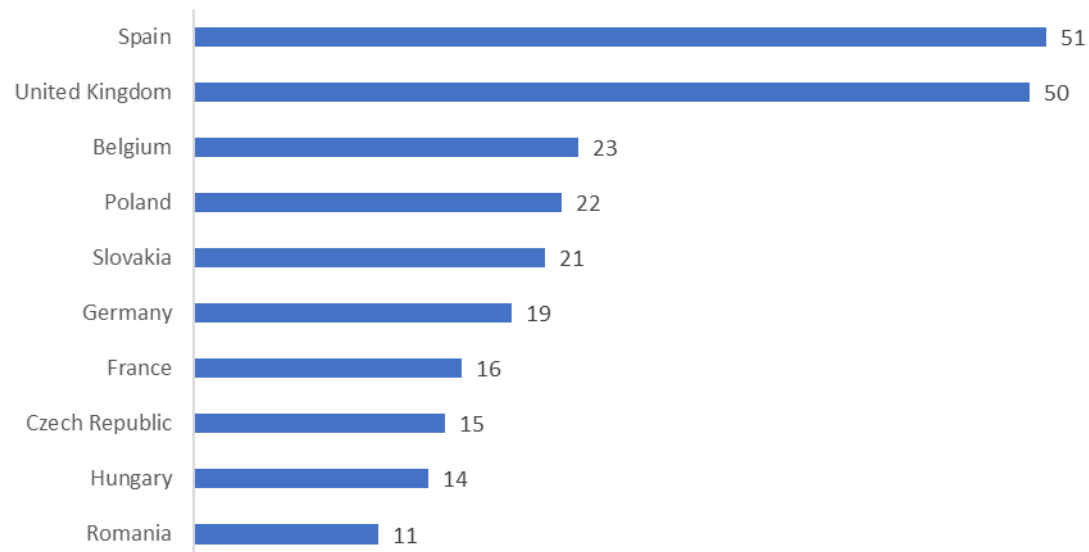
**Share of green-field projects:** 47%

**Percentage of investment projects in Europe (2014 – 2018):** 21%

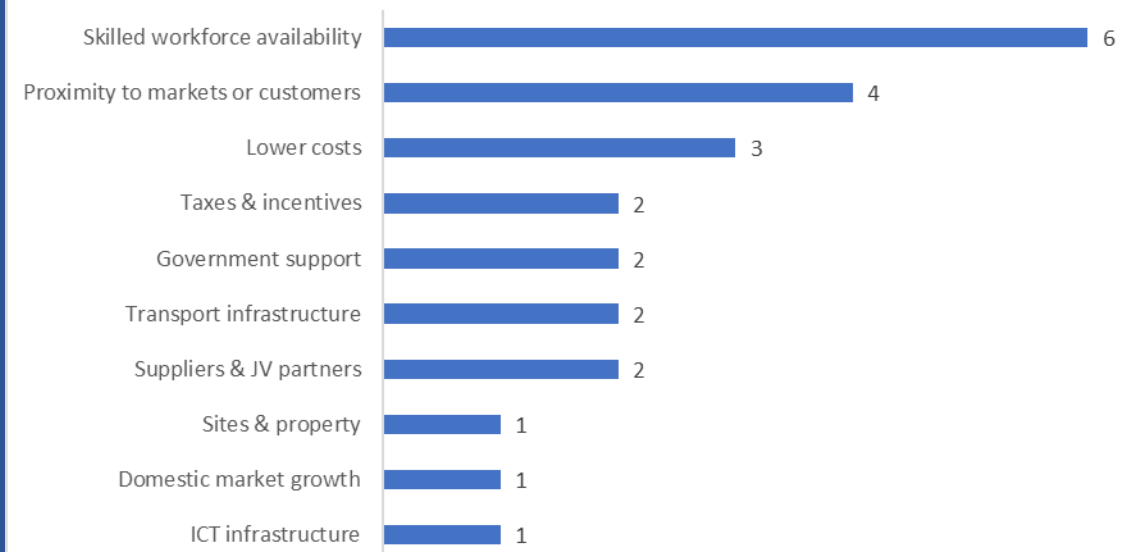
## Number of Projects 2003 - 2018



## Top 10 Destination Countries in Europe, 2003 - 2018



## Motives & Determinants, Europe 2003 - 2018





## SUB-SECTOR: HEAVY DUTY TRUCKS

» 1% of all project globally, 2014 - 2018

**Sector:** automotive OEM

» 3,8% of all projects globally, 2014 - 2018

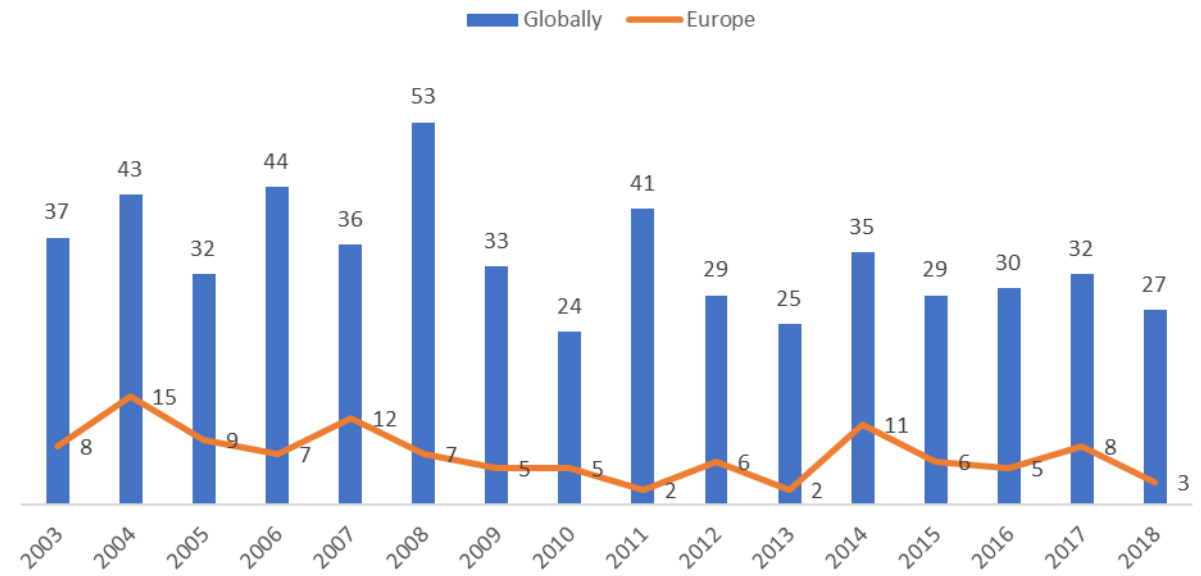
**Clusters:** agribusiness; transport equipment

**Number of projects in Lithuania:** 2 (2004; 2012)

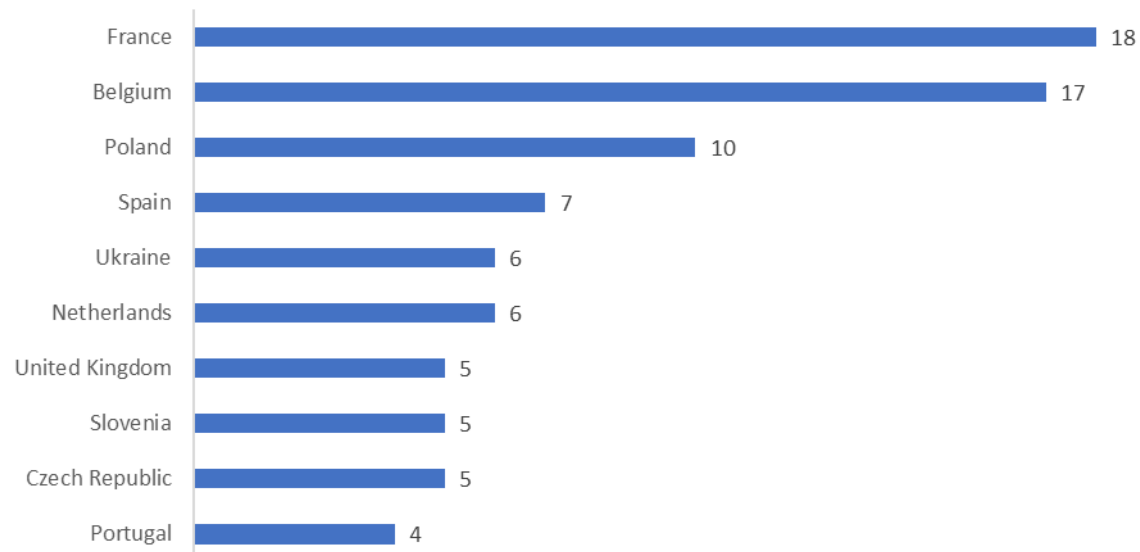
**Share of green-field projects:** 63%

**Percentage of investment projects in Europe (2014 – 2018):** 22%

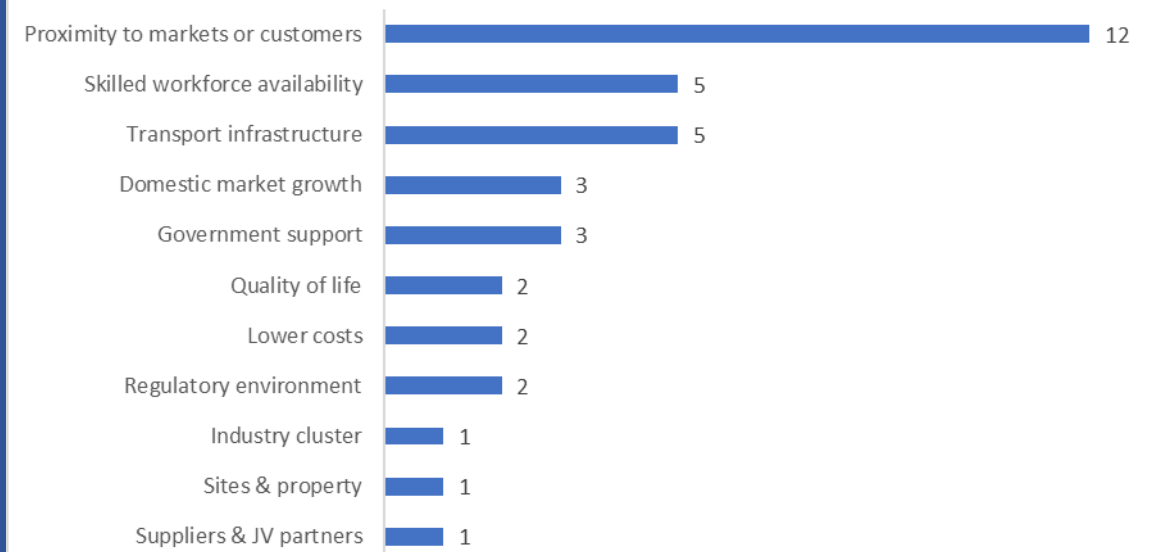
### Number of Projects, 2003 - 2018



### Top 10 Destination Countries in Europe, 2003 - 2018



### Motives & Determinants, Europe 2003 - 2018



## SUB-SECTOR: LIGHT TRUCKS & UTILITY VEHICLES

» 0,4% of all project globally, 2014 - 2018

**Sector:** automotive OEM

» 3,8% of all projects globally, 2014 - 2018

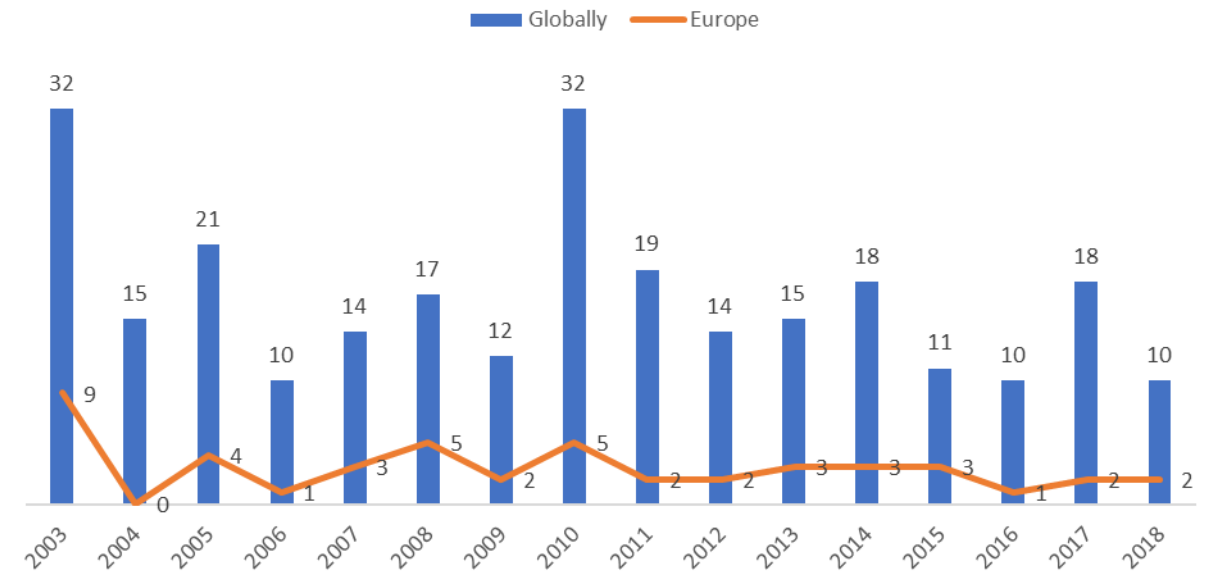
**Clusters:** transport equipment

**Number of projects in Lithuania:** 0

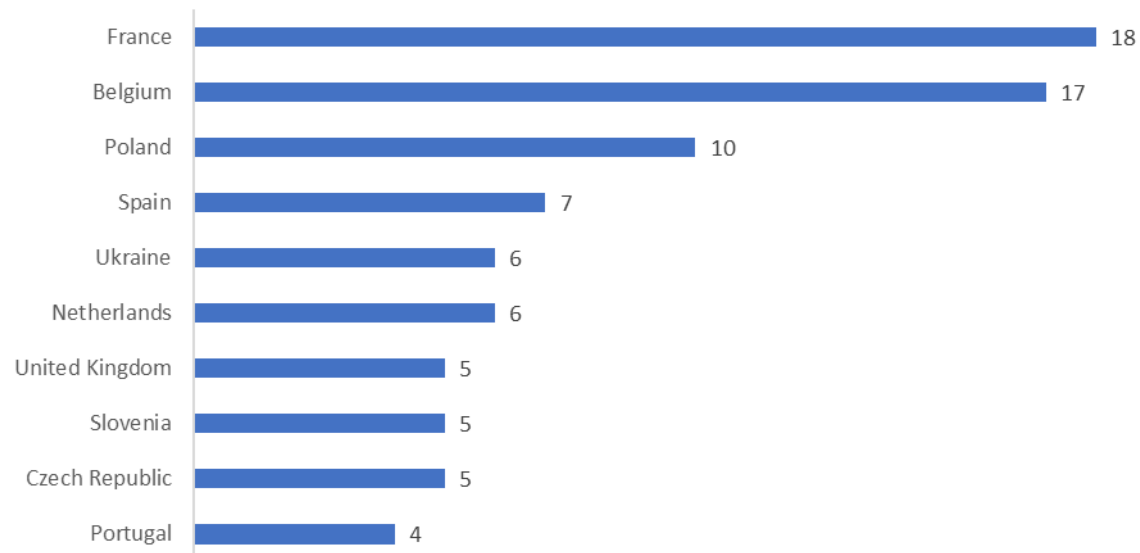
**Share of green-field projects:** 5%

**Percentage of investment projects in Europe (2014 – 2018):** 16%

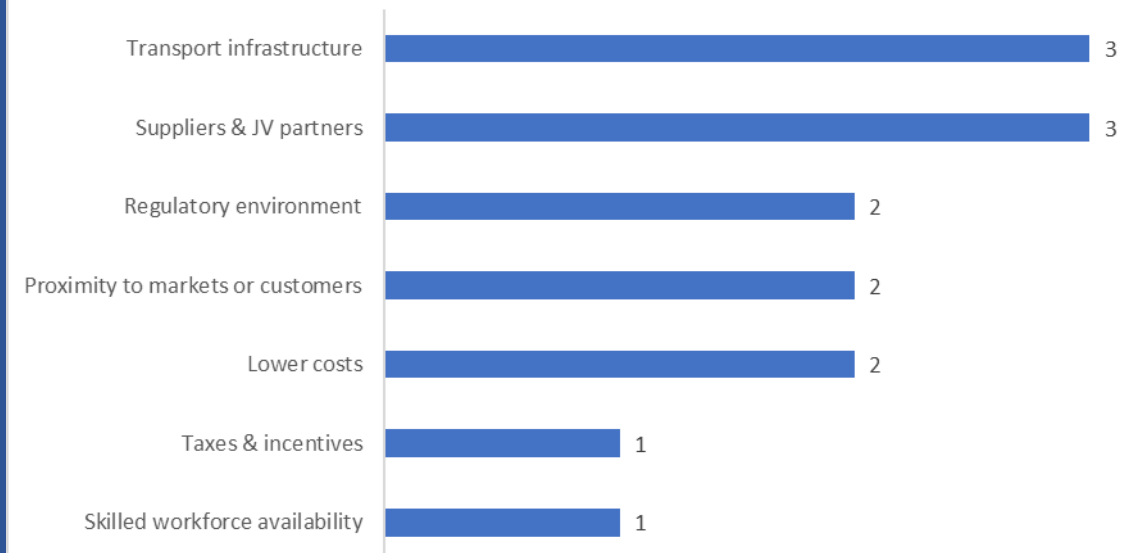
### Number of Projects, 2003 - 2018



### Top 10 Destination Countries in Europe, 2003 - 2018



### Motives & Determinants, Europe 2003 - 2018



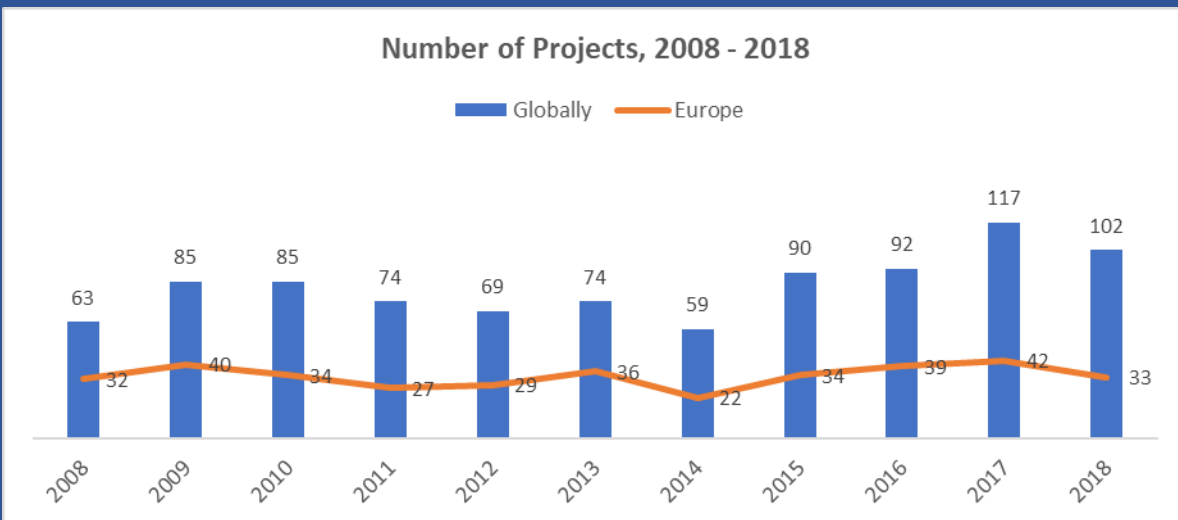
# PHARMACEUTICALS

## In the last 10 years (2008 – 2018):

- Number of projects globally: 910
- Number of projects in Europe: 368
- 40% of all investment projects in this sector happened in Europe\*

## In the last 4 years (2014 – 2018):

- 3% of all investment projects happened in this sector



## Top10 destination\*\* countries globally

United States (140)  
 China (112)  
 France (77)  
 Germany (72)  
 Ireland (72)  
 India (61)  
 Spain (59)  
 United Kingdom (58)  
 Russia (54)  
 Brazil (40)

## Top10 destination countries, Europe

France (77)  
 Germany (72)  
 Ireland (72)  
 Spain (59)  
 United Kingdom (58)  
 Belgium (25)  
 Italy (24)  
 Hungary (21)  
 Austria (18)  
 Poland (17)

## Top10 investing\*\* countries globally

United States (279)  
 Switzerland (148)  
 Germany (134)  
 United Kingdom (120)  
 France (94)  
 India (84)  
 Japan (80)  
 Netherlands (31)  
 Israel (30)  
 Denmark (27)

## Top10 investing countries, Europe

Switzerland (148)  
 Germany (134)  
 United Kingdom (120)  
 France (94)  
 Netherlands (31)  
 Denmark (27)  
 Italy (19)  
 Ireland (16)  
 Spain (14)  
 Belgium (11)

\*In total, globally and in all sectors, between 2008 and 2018, 28% of all investment projects happened in Europe

\*\* Based on number of investment projects in the sector

## SUB-SECTOR: PHARMACEUTICAL PREPARATIONS

» 2,7% of all project globally, 2014 - 2018

**Sector:** pharmaceuticals

» 3% of all projects globally, 2014 – 2018

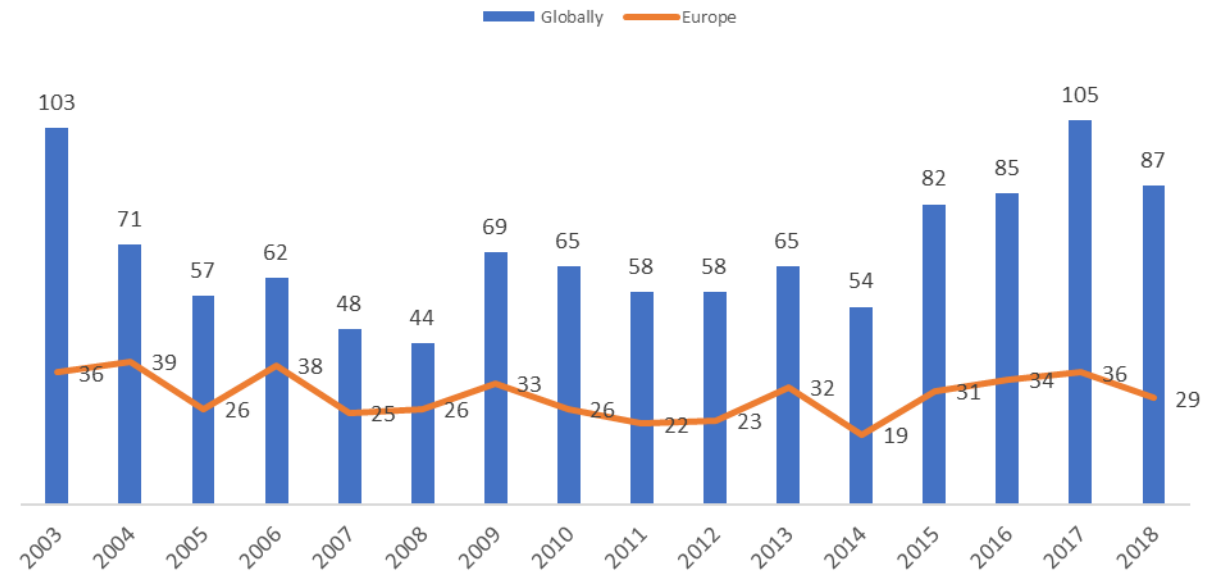
**Clusters:** lifesciences

**Number of projects in Lithuania: 1 (2012)**

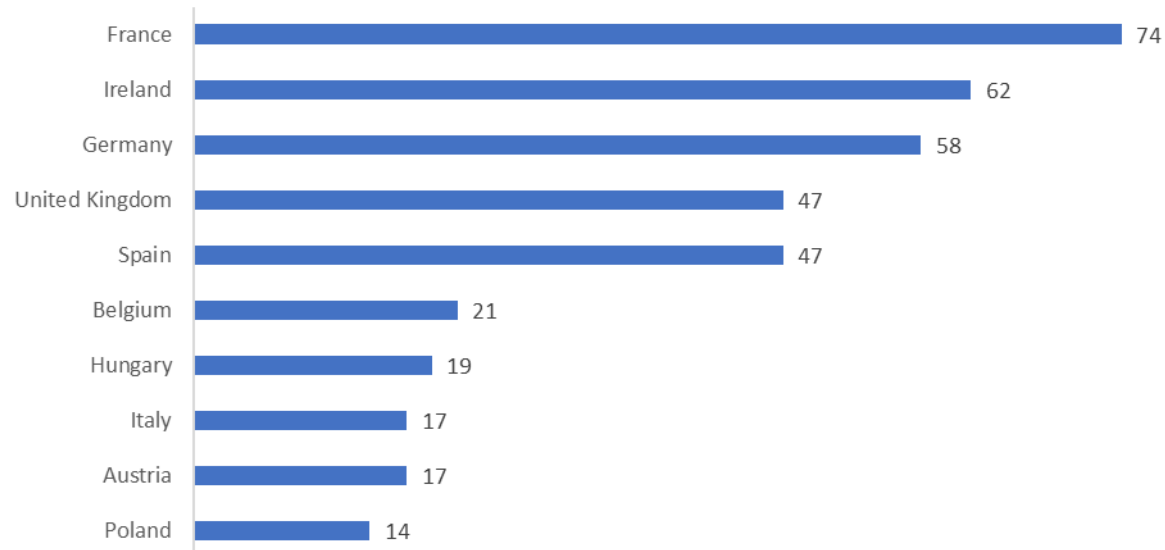
**Share of green-field projects: 47%**

**Percentage of investment projects in Europe (2014 – 2018): 36%**

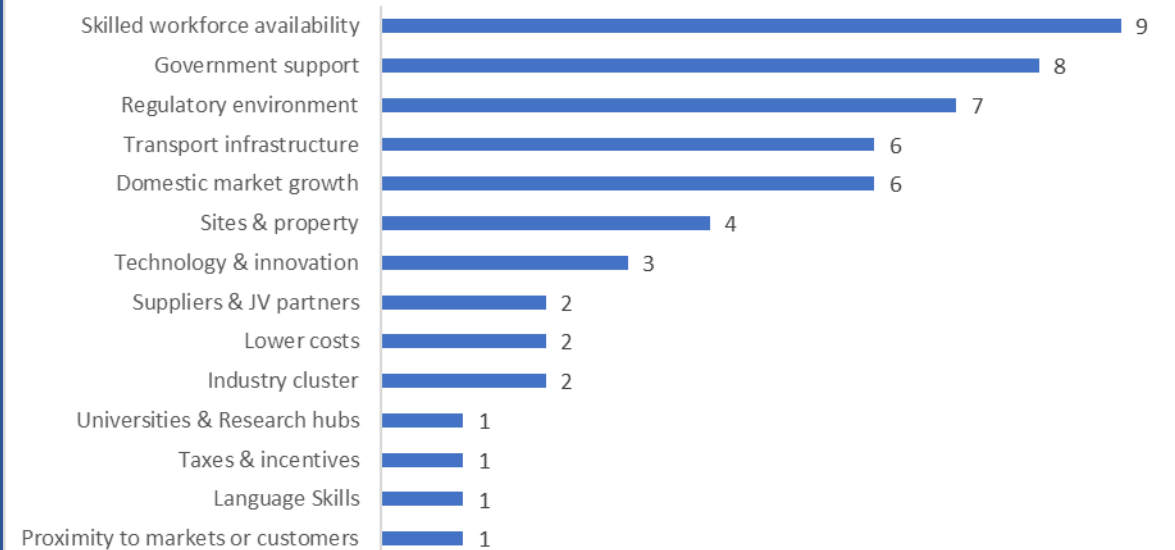
### Number of Projects, 2003 - 2018



### Top 10 Destination Countries in Europe, 2003 - 2018



### Motives & Determinants, Europe 2003 - 2018



## SUB-SECTOR: MEDICINAL & BOTANICAL

» 0,3% of all project globally, 2014 - 2018

### Sector: pharmaceuticals

» 3% of all projects globally, 2014 – 2018

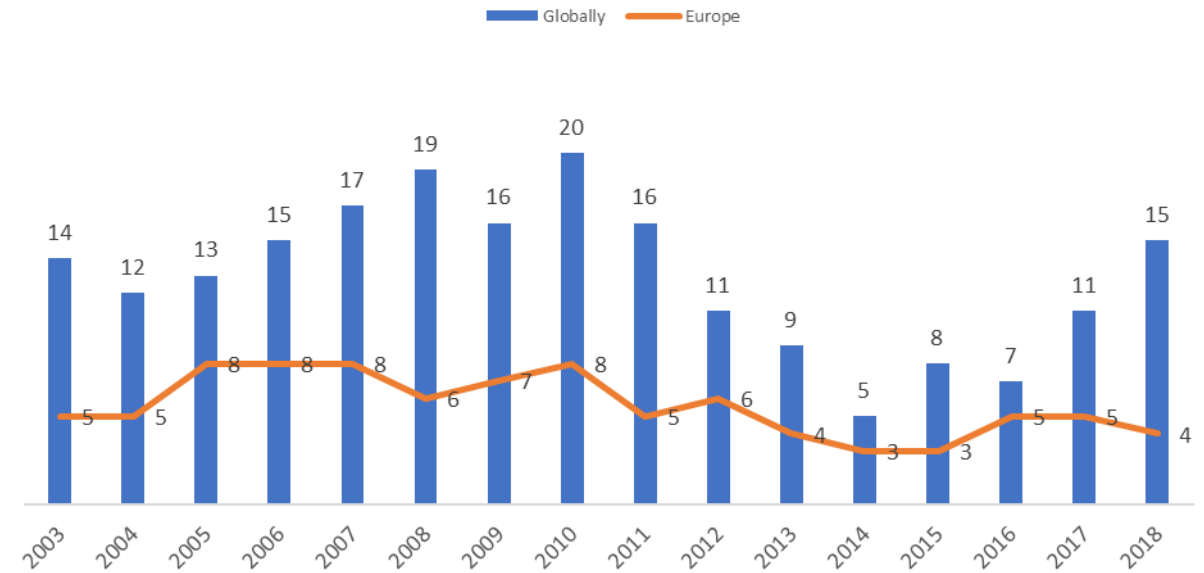
**Clusters:** life science; physical science

**Number of projects in Lithuania: 0**

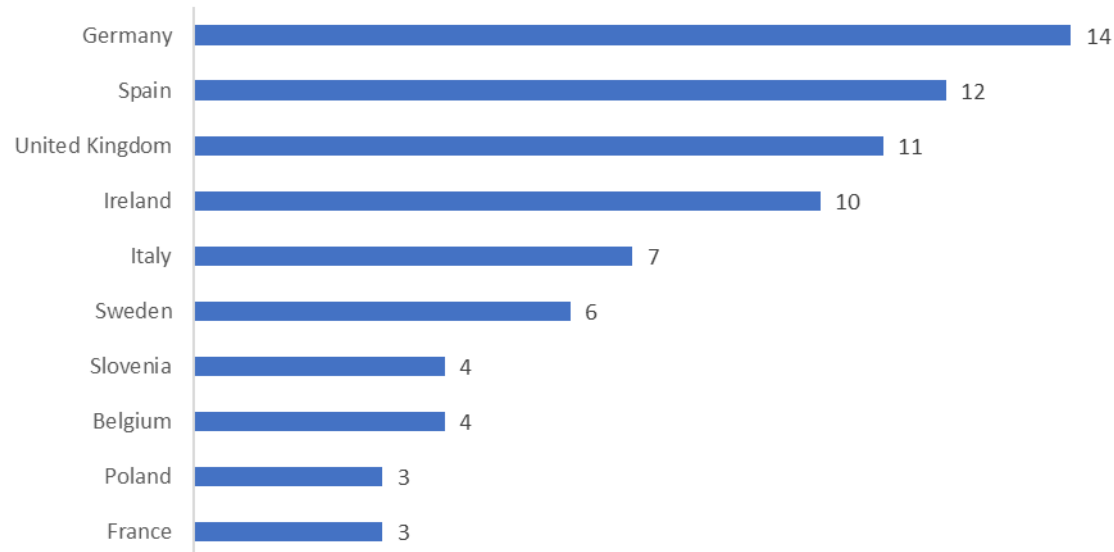
**Share of green-field projects: 56%**

**Percentage of investment projects in Europe (2014 – 2018): 43%**

### Number of Projects, 2003 - 2018



### Top 10 Destination Countries in Europe, 2003 - 2018



### Motives & Determinants, Europe 2003 – 2018

- Suppliers & JV partners
- Proximity to markets or customers
- Regulatory environment
- Skilled workforce availability

# TEXTILES

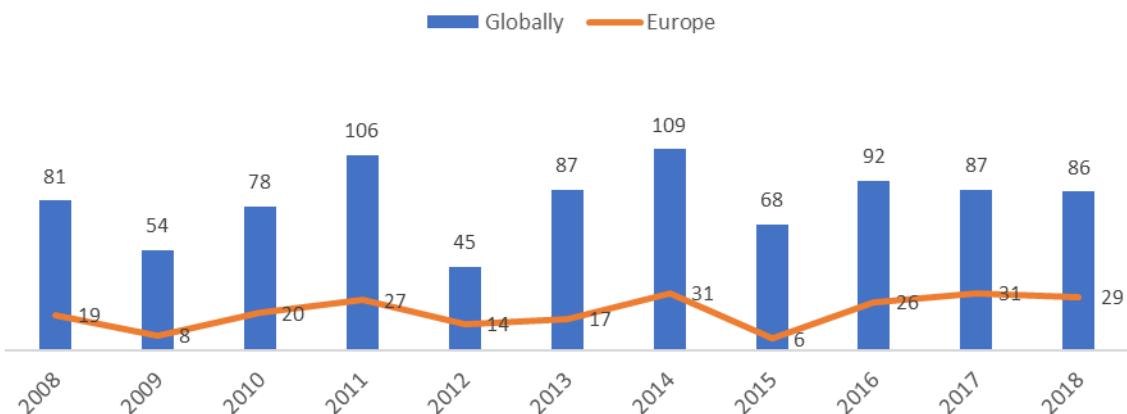
## In the last 10 years (2008 – 2018):

- Number of projects globally: 893
- Number of projects in Europe: 228
- 26% of all investment projects in this sector happened in Europe\*

## In the last 4 years (2014 – 2018):

- 2,9% of all investment projects happened in this sector

Number of Projects, 2008 - 2018



## Top10 destination\*\* countries globally

Vietnam (163)  
 China (149)  
 United States (117)  
 Serbia (79)  
 India (57)  
 Ethiopia (40)  
 Bulgaria (32)  
 Mexico (31)  
 Hungary (29)  
 Thailand (29)

## Top10 destination countries, Europe

Serbia (79)  
 Bulgaria (32)  
 Hungary (29)  
 Romania (23)  
 Poland (19)  
 Bosnia-Herzegovina (18)  
 France (17)  
 Czech Republic (15)  
 Germany (15)  
 United Kingdom (14)

## Top10 investing\*\* countries globally

Italy (142)  
 United States (142)  
 Japan (102)  
 Germany (95)  
 Taiwan (83)  
 South Korea (63)  
 Turkey (63)  
 China (60)  
 United Kingdom (51)  
 France (46)

## Top10 investing countries, Europe

Italy (142)  
 Germany (95)  
 United Kingdom (51)  
 France (46)  
 Austria (38)  
 Denmark (29)  
 Spain (29)  
 Belgium (22)  
 Netherlands (22)  
 Switzerland (19)

\*For Europe's summary statistics check Summary slide

\*\* Based on number of investment projects in the sector

## SUB-SECTOR: TEXTILES & TEXTILE MILLS

» 1% of all project globally, 2014 - 2018

### Sector: textiles

» 2,9% of all projects globally, 2014 - 2018

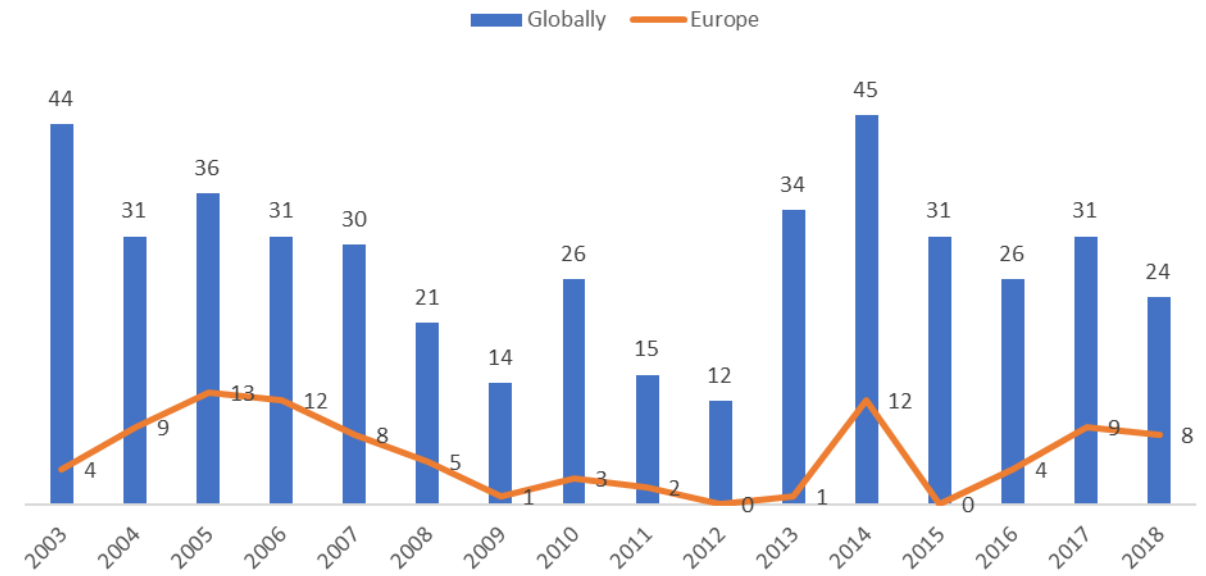
**Clusters:** agribusiness; construction; consumer goods; ICT & electronics; industrial; life science; transport equipment; wood, apparel & related products

**Number of projects in Lithuania:** 4 (2006; 2017 (2); 2019)

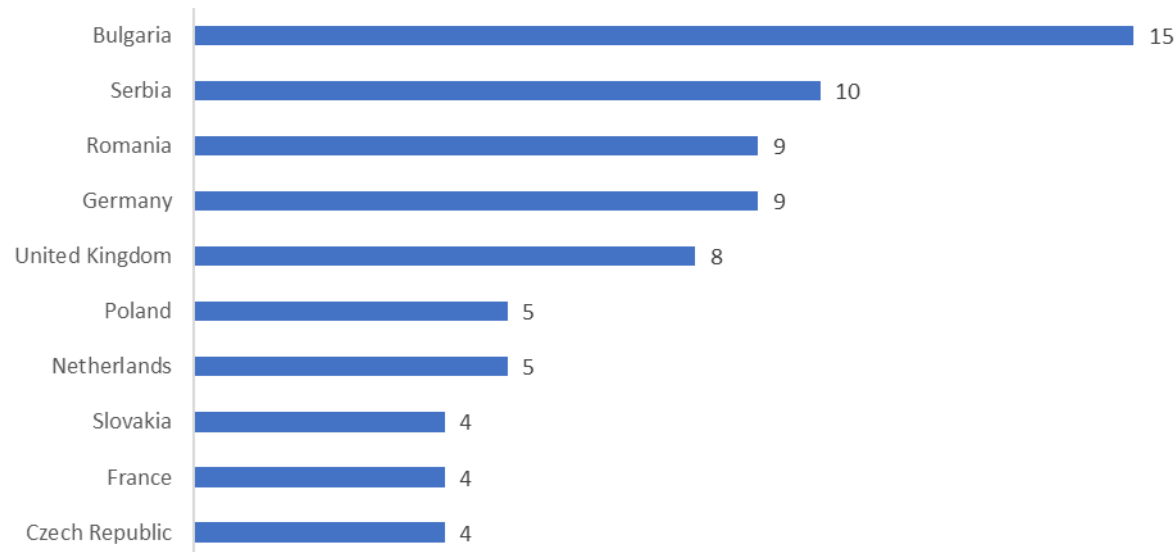
**Share of green-field projects:** 67%

**Percentage of investment projects in Europe (2014 – 2018):** 21%

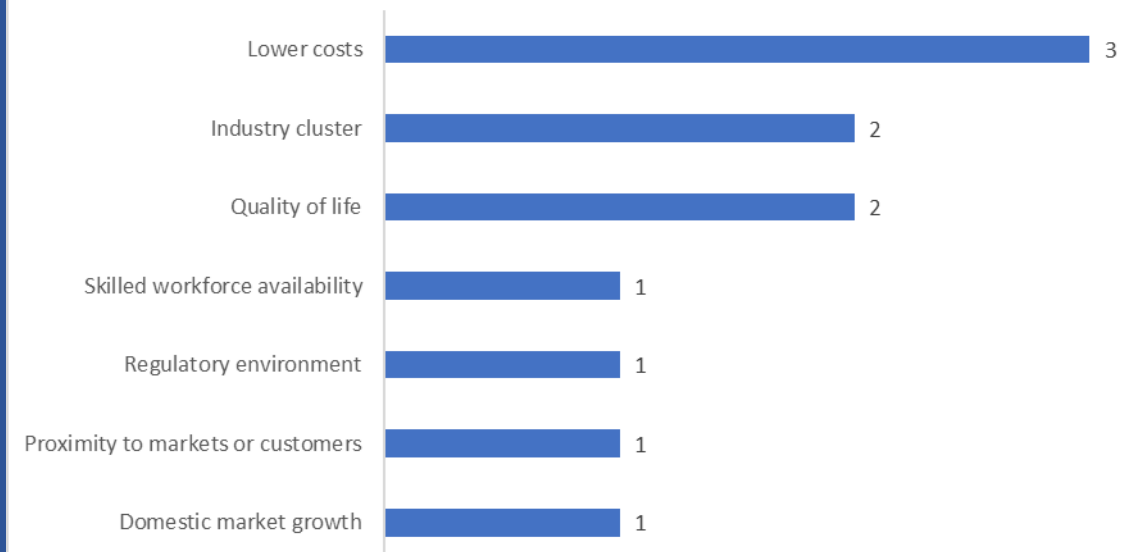
## Number of Projects, 2003 - 2018



## Top 10 Destination Countries in Europe, 2003 - 2018



## Motives & Determinants, Europe 2003 - 2018



## SUB-SECTOR: CLOTHING & CLOTHING ACCESSORIES

» 1% of all project globally, 2014 - 2018

### Sector: textiles

» 2,9% of all projects globally, 2014 – 2018

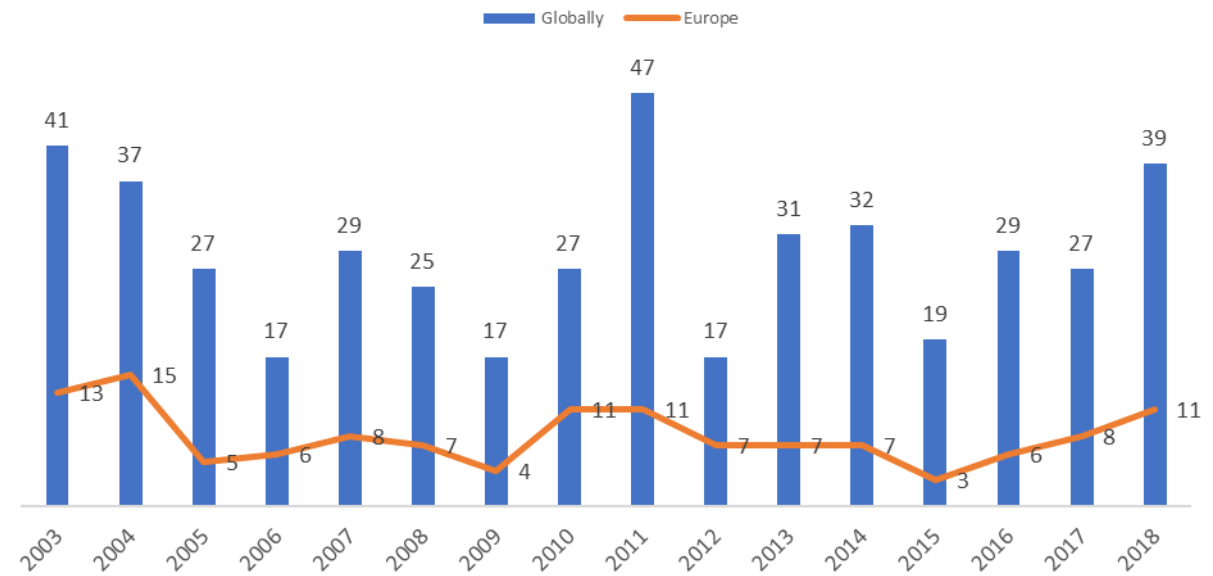
**Clusters:** consumer goods; industrial; wood, apparel & related products

**Number of projects in Lithuania:** 4 (2003; 2004; 2006; 2011)

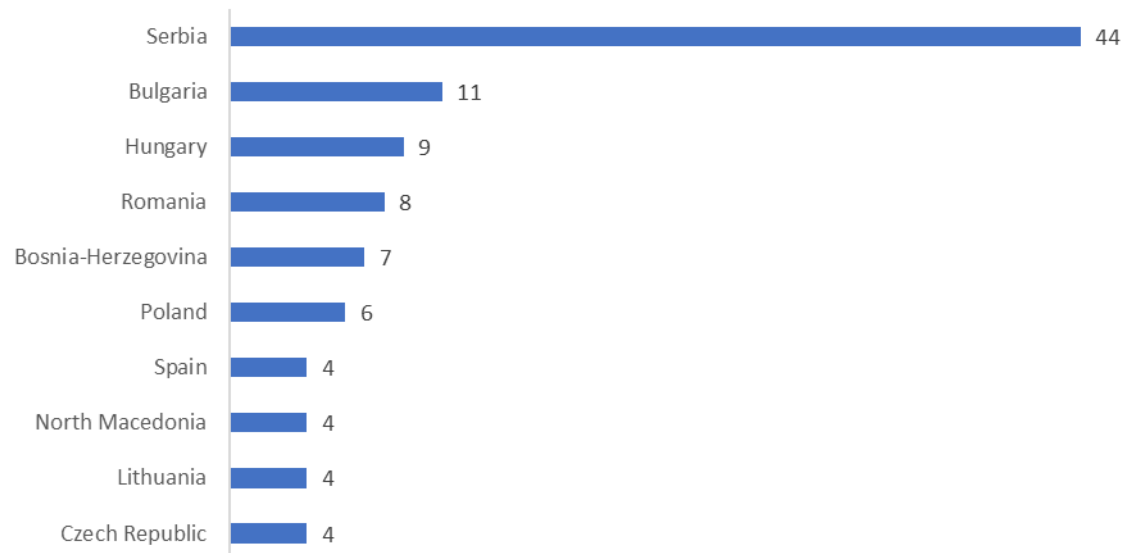
**Share of green-field projects:** 80%

**Percentage of investment projects in Europe (2014 – 2018):** 24%

### Number of Projects, 2003 - 2018



### Top 10 Destination Countries in Europe, 2003 - 2018



### Motives & Determinants, Europe 2003 – 2018

- Lower costs
- Regulatory environment
- Taxes & incentives
- Sites & property



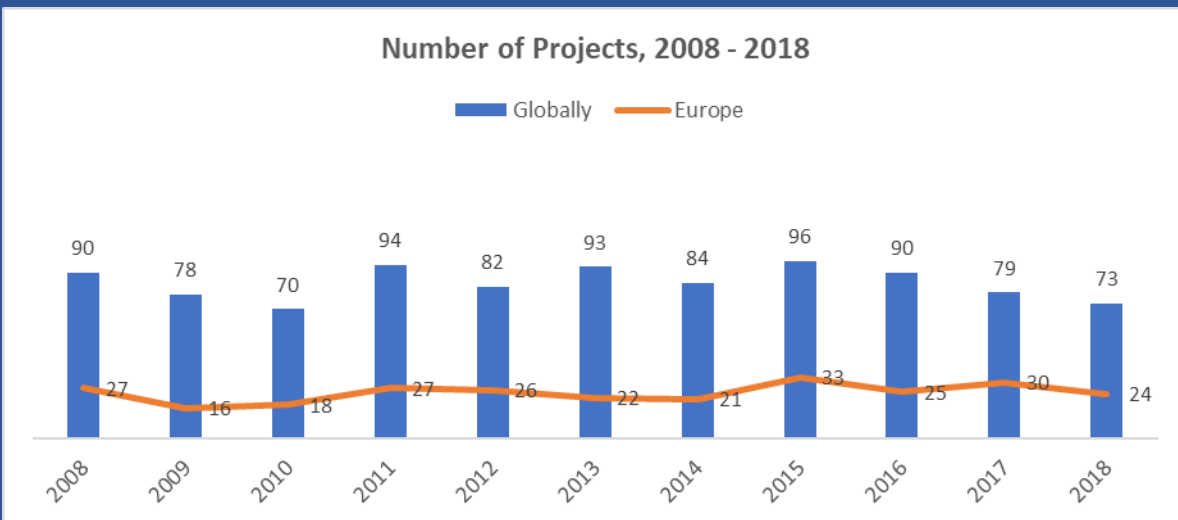
# CONSUMER PRODUCTS

## In the last 10 years (2008 – 2018):

- Number of projects globally: 929
- Number of projects in Europe: 269
- 29% of all investment projects in this sector happened in Europe\*

## In the last 4 years (2014 – 2018):

- 2,8% of all investment projects happened in this sector



### Top10 destination\*\* countries globally

China (126)  
 United States (117)  
 India (86)  
 Mexico (62)  
 France (58)  
 Vietnam (56)  
 Thailand (52)  
 Hungary (47)  
 Russia (38)  
 Poland (37)

### Top10 destination countries, Europe

France (58)  
 Hungary (47)  
 Poland (37)  
 Czech Republic (30)  
 Germany (30)  
 United Kingdom (22)  
 Ireland (17)  
 Serbia (17)  
 Spain (17)  
 Lithuania (16)

### Top10 investing\*\* countries globally

United States (235)  
 Germany (131)  
 United Kingdom (110)  
 Japan (103)  
 France (74)  
 Italy (55)  
 India (40)  
 Switzerland (39)  
 Sweden (38)  
 Spain (37)

### Top10 investing countries, Europe

Germany (131)  
 United Kingdom (110)  
 France (74)  
 Italy (55)  
 Switzerland (39)  
 Sweden (38)  
 Spain (37)  
 Denmark (31)  
 Austria (26)  
 Belgium (18)

\*In total, globally and in all sectors, between 2008 and 2018, 28% of all investment projects happened in Europe

\*\* Based on number of investment projects in the sector

## SUB-SECTOR: FURNITURE, HOMEWARE & RELATED PRODUCTS (CONSUMER PRODUCTS)

» 0,7% of all project globally, 2014 - 2018

**Sector:** consumer products

» 2,8% of all projects globally, 2014 – 2018

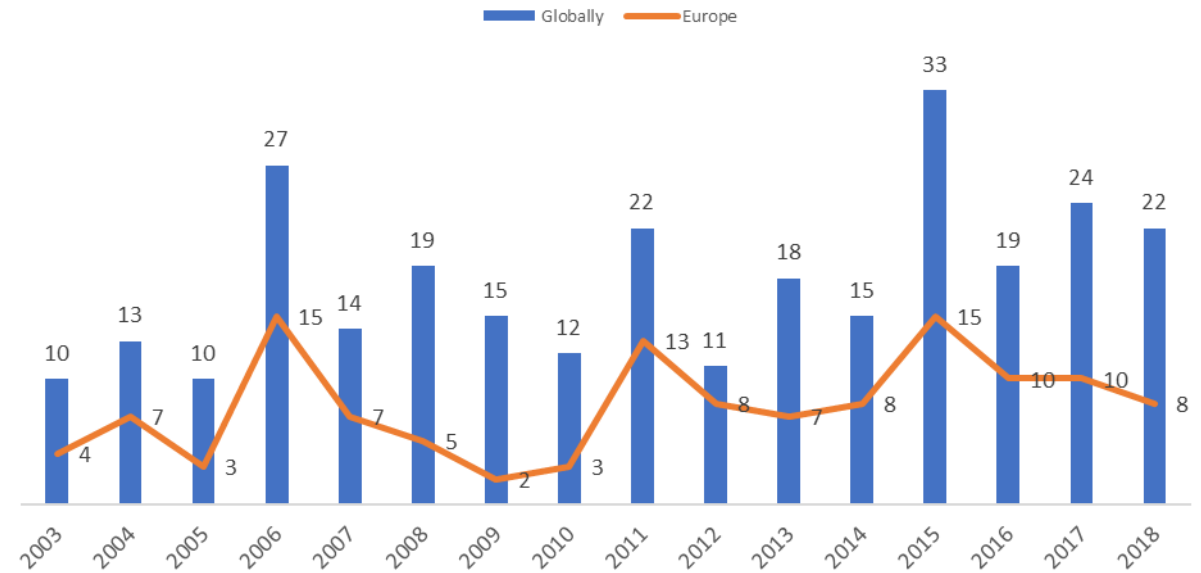
**Clusters:** consumer goods; retailed trade; wood, apparel & related products

**Number of projects in Lithuania:** 12 (2006; 2011 (2); 2012; 2014 (3); 2016 (2); 2017; 2018; 2019)

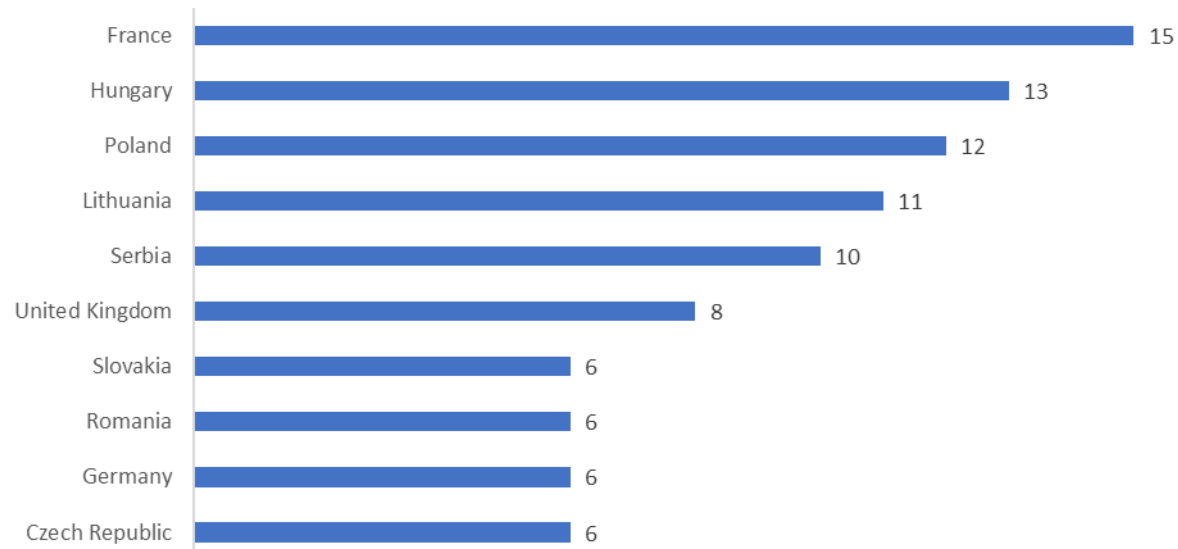
**Share of green-field projects:** 70%

**Percentage of investment projects in Europe (2014 – 2018):** 45%

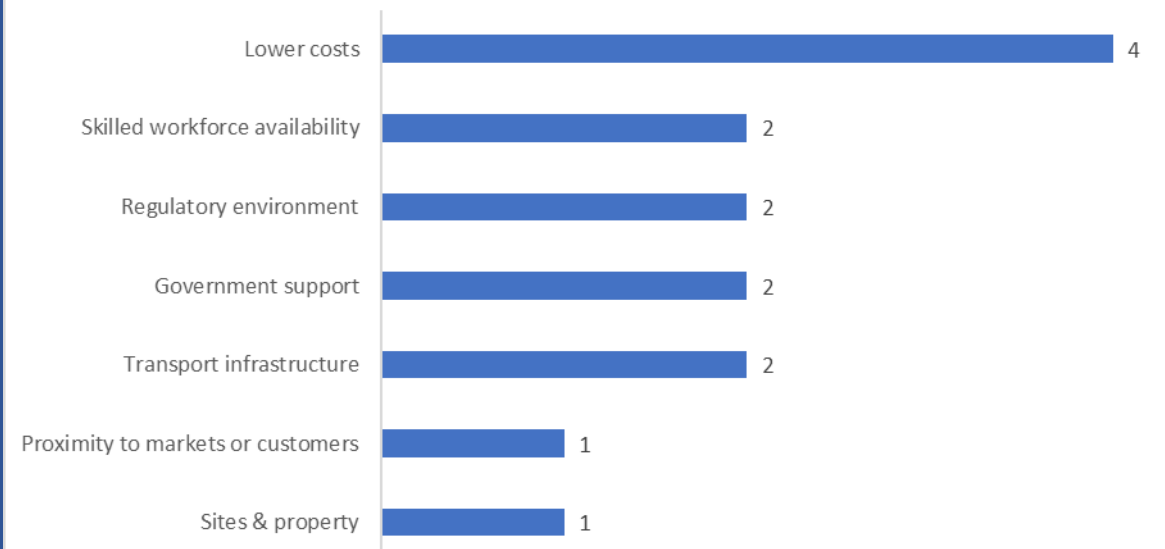
### Number of Projects, 2003 - 2018



### Top 10 Destination Countries in Europe, 2003 - 2018



### Motives & Determinants, Europe 2003 - 2018



## SUB-SECTOR: BUILDING MATERIAL & GARDEN EQUIPMENT & SUPPLIES DEALERS

» 0,2% of all project globally, 2014 - 2018

**Sector:** building materials; consumer products

» 2,7% & 2,8% of all projects globally, 2014 - 2018

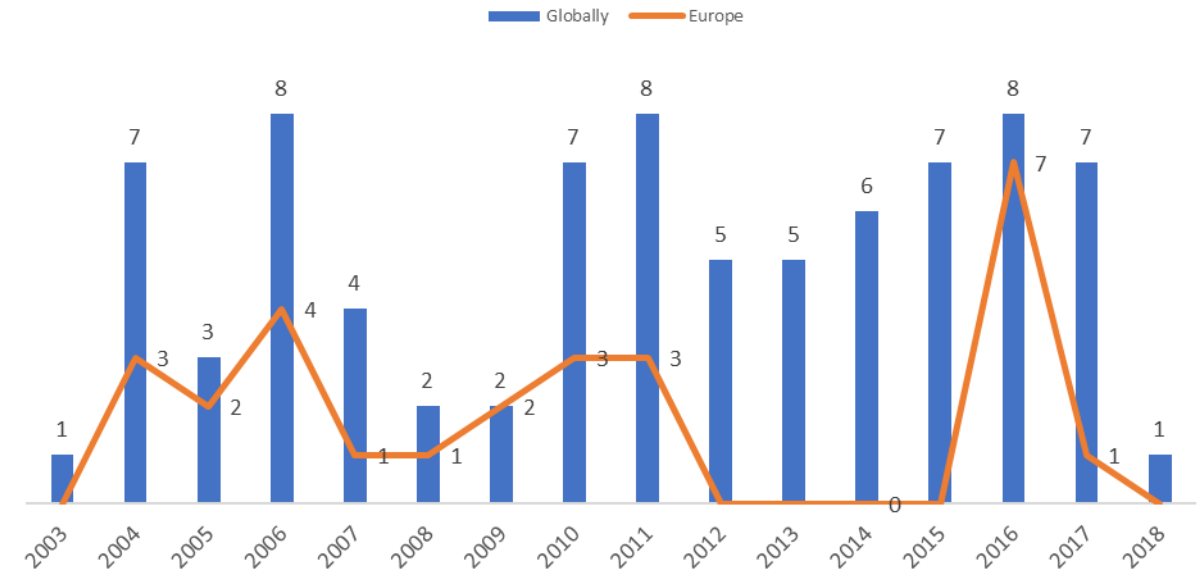
**Clusters:** construction; consumer goods

**Number of projects in Lithuania:** 1 (2016)

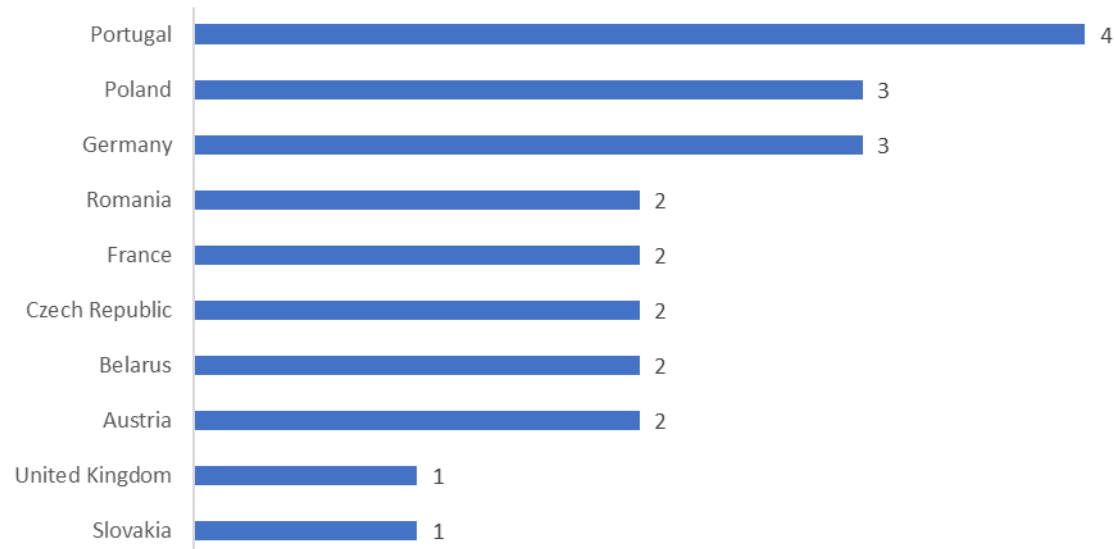
**Share of green-field projects:** 60%

**Percentage of investment projects in Europe (2014 – 2018):** 28%

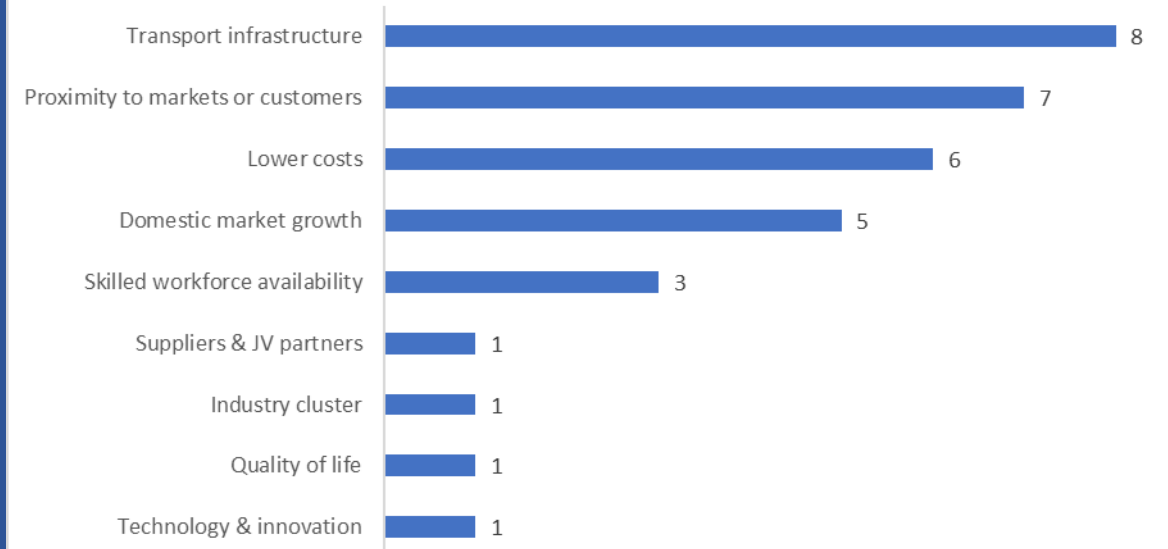
### Number of Projects, 2003 - 2018



### Top 10 Destination Countries in Europe, 2003 - 2018



### Motives & Determinants, Europe 2003 - 2018



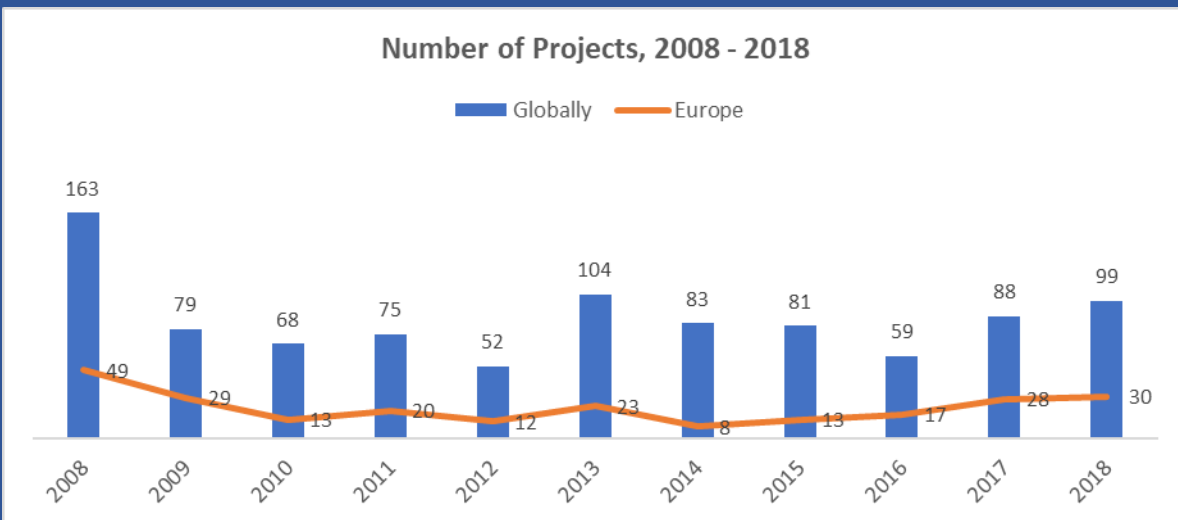
# BUILDING MATERIALS

## In the last 10 years (2008 – 2018):

- Number of projects globally: 951
- Number of projects in Europe: 242
- 25% of all investment projects in this sector happened in Europe\*

## In the last 4 years (2014 – 2018):

- 2,7% of all investment projects happened in this sector



## Top10 destination\*\* countries globally

Russia (117)  
 United States (106)  
 China (85)  
 Romania (66)  
 India (64)  
 France (57)  
 Poland (43)  
 Hungary (35)  
 Ukraine (33)  
 Vietnam (32)

## Top10 destination countries, Europe

Romania (66)  
 France (57)  
 Poland (43)  
 Hungary (35)  
 Ukraine (33)  
 Spain (29)  
 United Kingdom (27)  
 Serbia (26)  
 Bulgaria (24)  
 Germany (22)

## Top10 investing\*\* countries globally

France (213)  
 Germany (208)  
 Switzerland (119)  
 Austria (116)  
 Italy (61)  
 Mexico (57)  
 China (55)  
 Spain (49)  
 United States (49)  
 Denmark (38)

## Top10 investing countries, Europe

France (213)  
 Germany (208)  
 Switzerland (119)  
 Austria (116)  
 Italy (61)  
 Spain (49)  
 Denmark (38)  
 Portugal (34)  
 Ireland (32)  
 Finland (18)

\*In total, globally and in all sectors, between 2008 and 2018, 28% of all investment projects happened in Europe

\*\* Based on number of investment projects in the sector

## SUB-SECTOR: CEMENT & CONCRETE PRODUCTS

» 1,6% of all project globally, 2014 - 2018

**Sector:** building materials

» 2,7% of all projects globally, 2014 – 2018

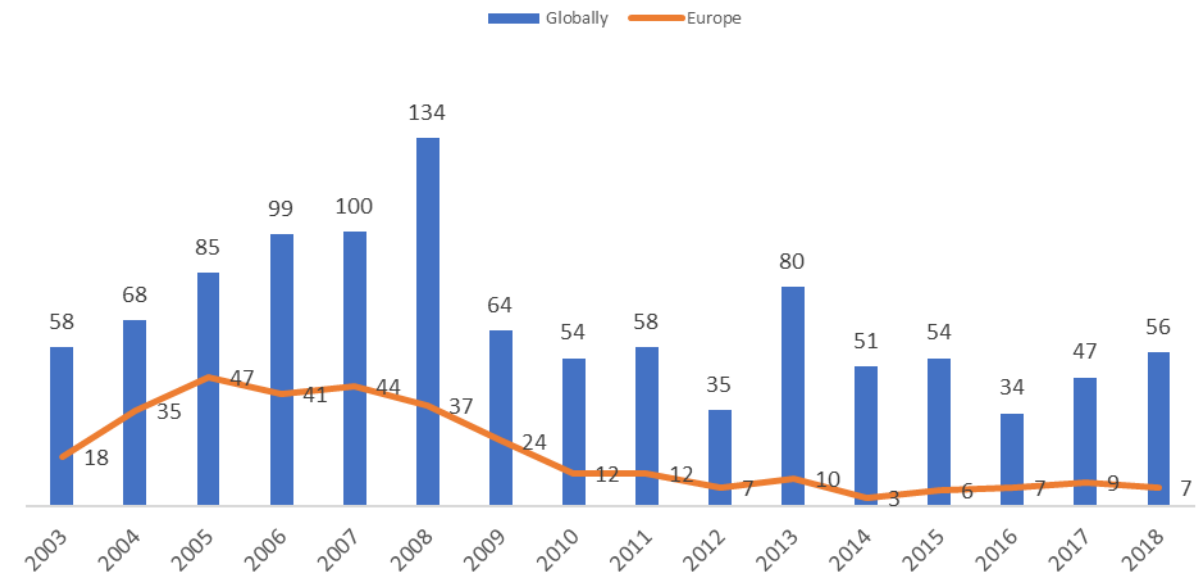
**Clusters:** agribusiness; construction; consumer goods; energy; environmental technology; industrial; physical science; transport equipment; transportation & warehousing

**Number of projects in Lithuania:** 2 (2007; 2010)

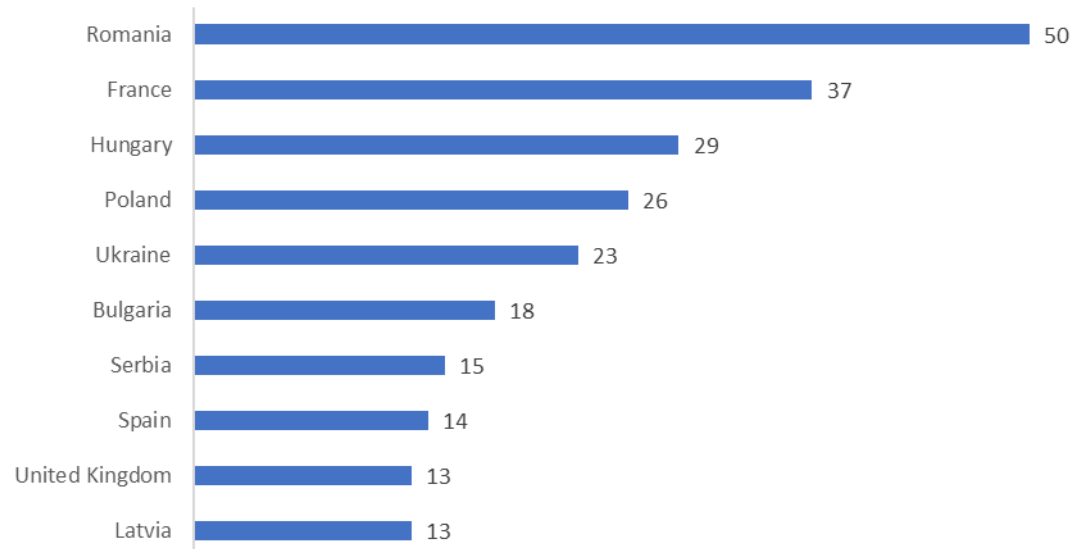
**Share of green-field projects:** 72%

**Percentage of investment projects in Europe (2014 – 2018):** 13%

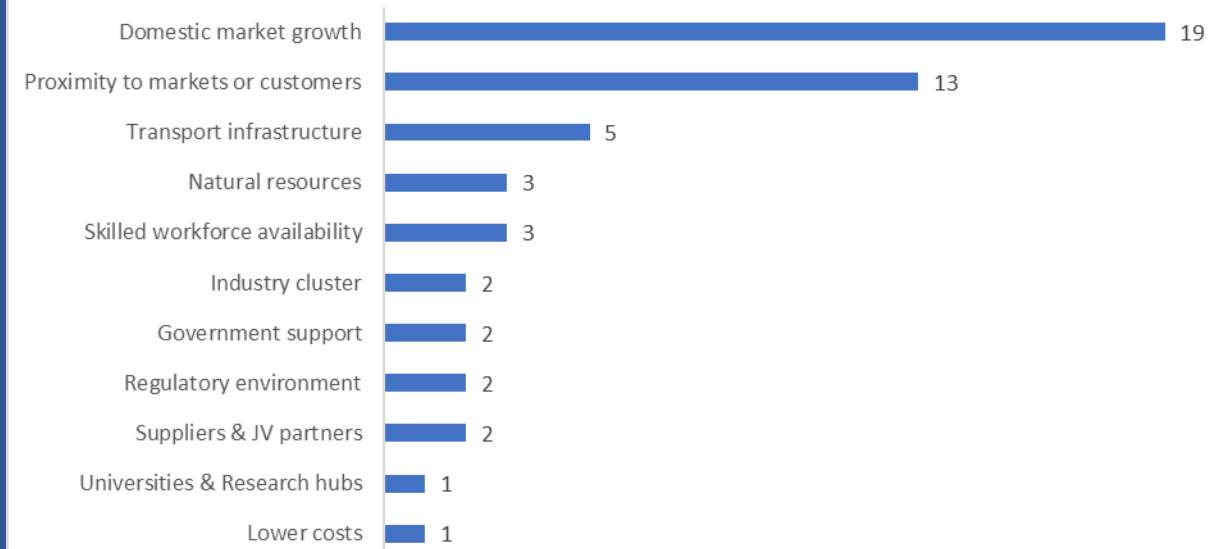
## Number of Projects, 2003 - 2018



## Top 10 Destination Countries in Europe, 2003 - 2018



## Motives & Determinants, Europe 2003 - 2018



## SUB-SECTOR: ASPHALT PAVING, ROOFING & SATURATED METALS

» 0,7% of all project globally, 2014 - 2018

**Sector:** building materials

» 2,7% of all projects globally, 2014 - 2018

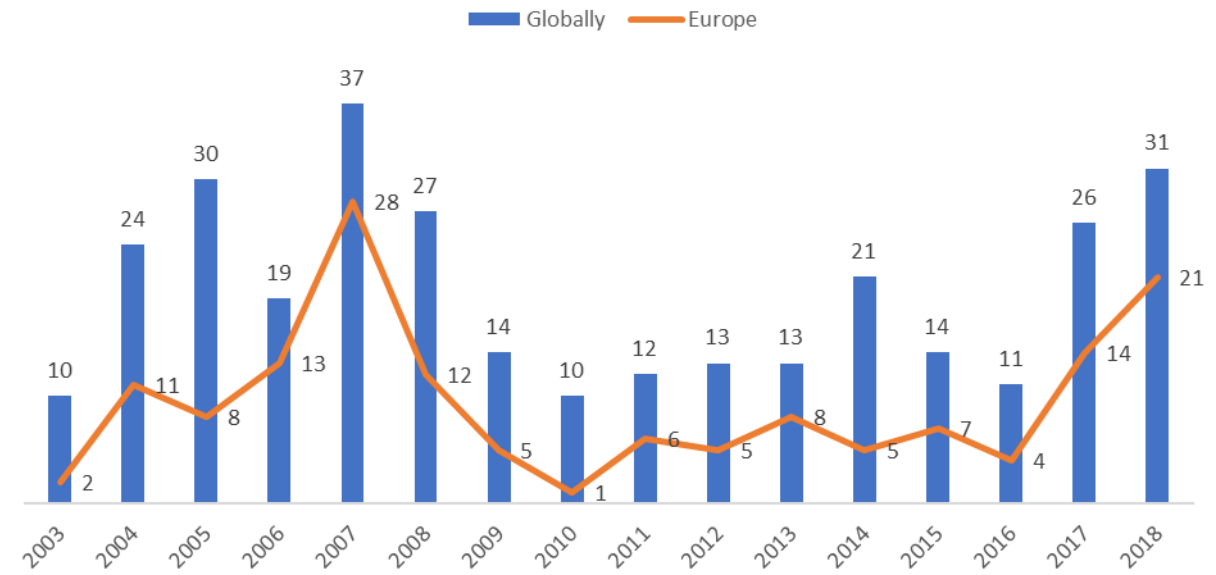
**Clusters:** construction; environmental technology; industrial

**Number of projects in Lithuania:** 4 (2003; 2008; 2009; 2015)

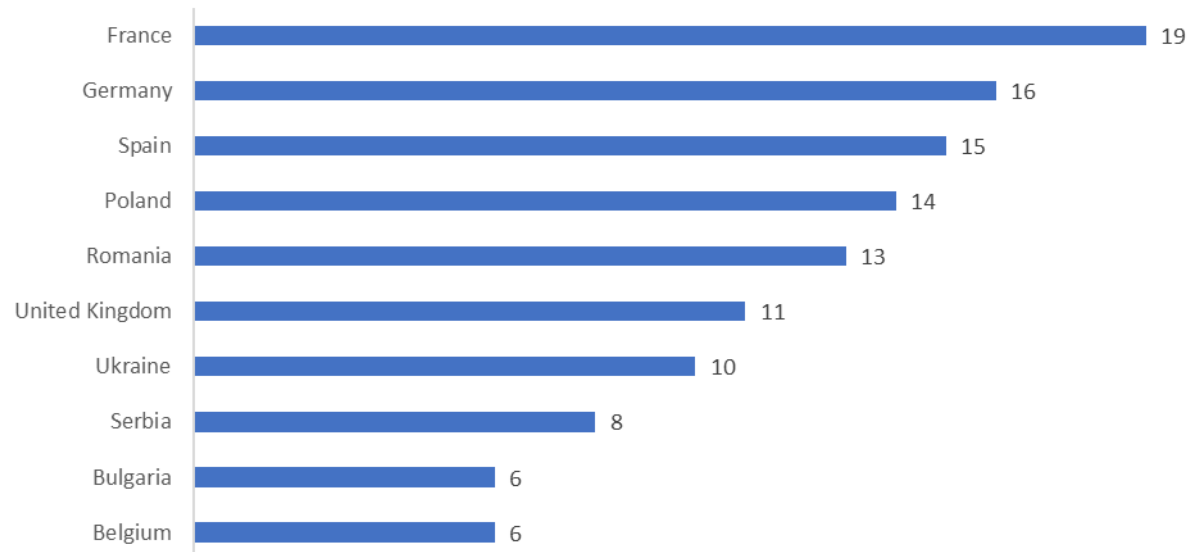
**Share of green-field projects:** 68%

**Percentage of investment projects in Europe (2014 – 2018):** 50%

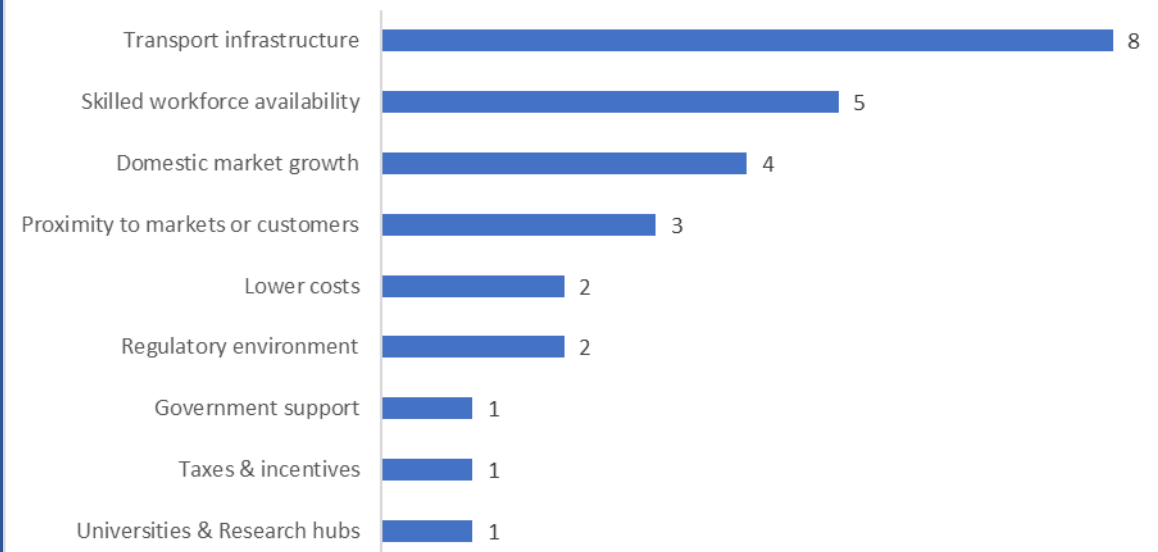
### Number of Projects, 2003 - 2018



### Top 10 Destination Countries in Europe, 2003 - 2018



### Motives & Determinants, Europe 2003 - 2018



## SUB-SECTOR: BUILDING MATERIAL & GARDEN EQUIPMENT & SUPPLIES DEALERS

» 0,2% of all project globally, 2014 - 2018

**Sector:** building materials; consumer products

» 2,7% & 2,8% of all projects globally, 2014 - 2018

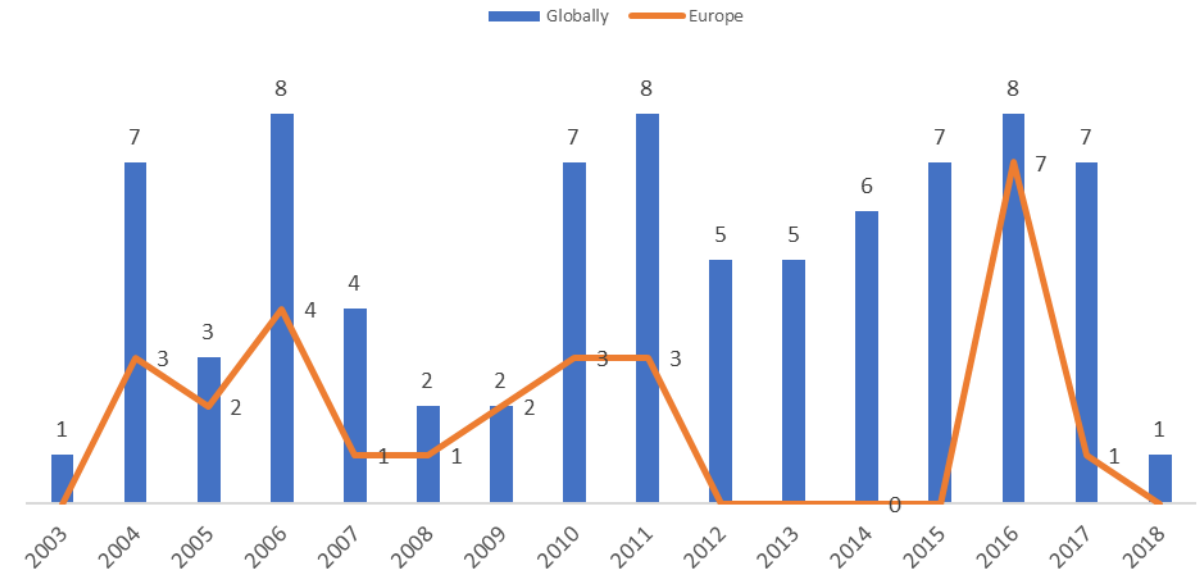
**Clusters:** construction; consumer goods

**Number of projects in Lithuania:** 1 (2016)

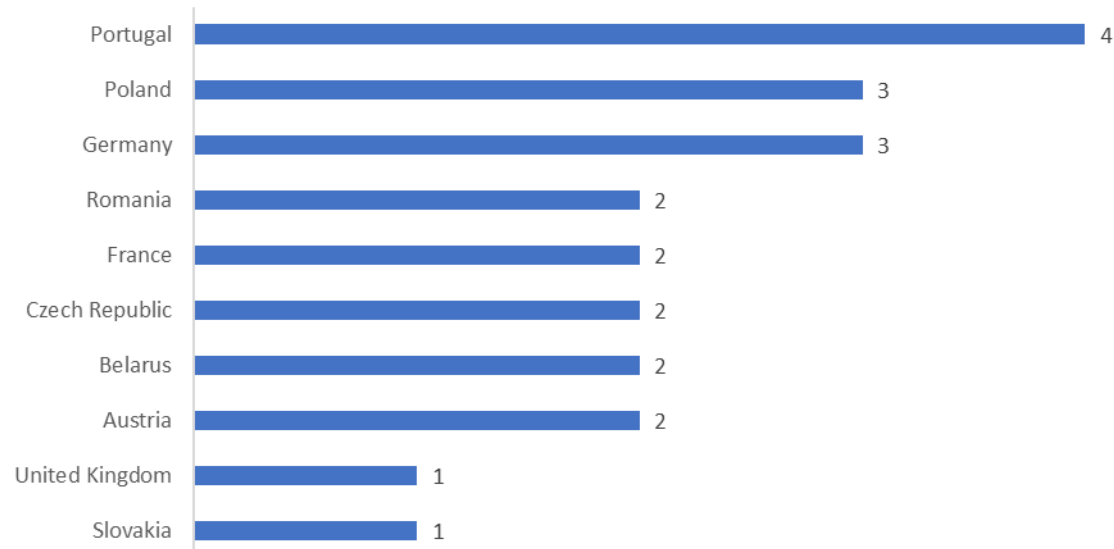
**Share of green-field projects:** 60%

**Percentage of investment projects in Europe (2014 – 2018):** 28%

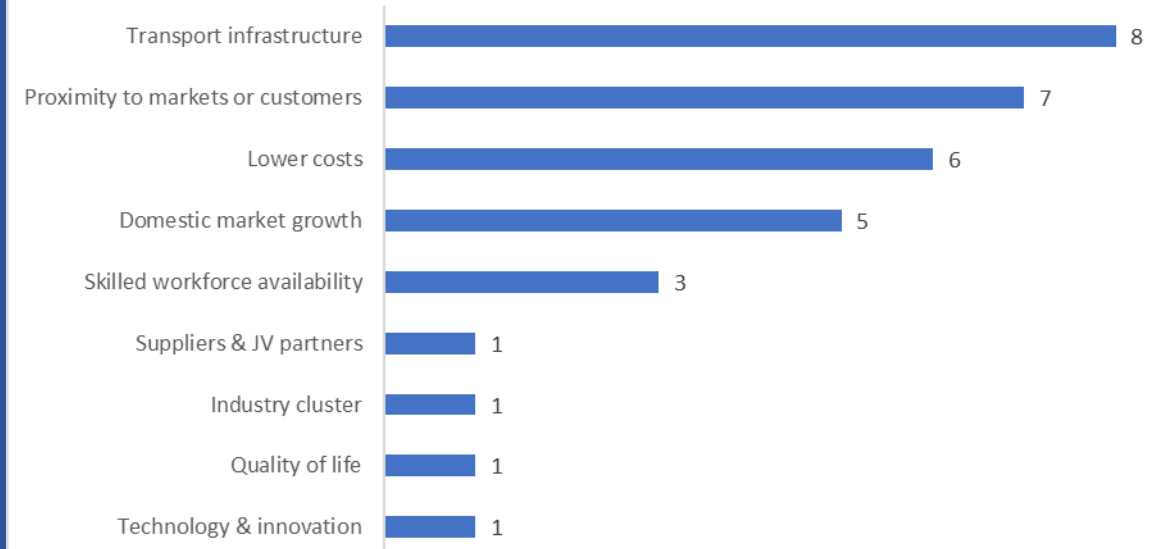
### Number of Projects, 2003 - 2018



### Top 10 Destination Countries in Europe, 2003 - 2018



### Motives & Determinants, Europe 2003 - 2018



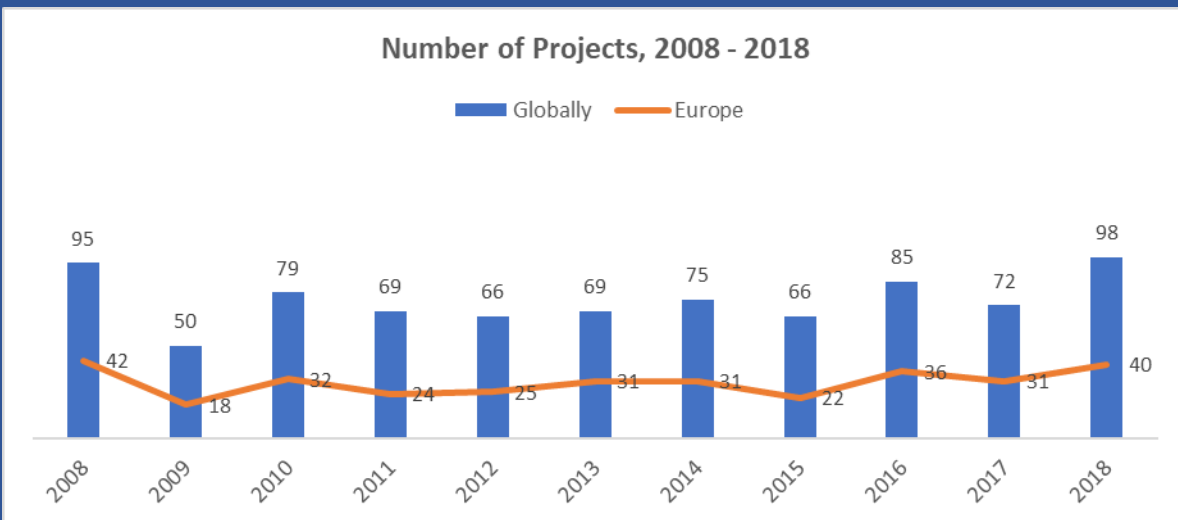
# PAPER, PRINTING & PACKAGING

## In the last 10 years (2008 – 2018):

- Number of projects globally: 824
- Number of projects in Europe: 332
- 40% of all investment projects in this sector happened in Europe\*

## In the last 4 years (2014 – 2018):

- 2,6% of all investment projects happened in this sector



## Top10 destination\*\* countries globally

United States (121)  
 China (110)  
 Poland (90)  
 Russia (84)  
 France (73)  
 Germany (73)  
 United Kingdom (73)  
 Spain (46)  
 Brazil (44)  
 Vietnam (41)

## Top10 destination countries, Europe

Poland (90)  
 Germany (73)  
 France (73)  
 United Kingdom (73)  
 Spain (46)  
 Hungary (38)  
 Czech Republic (19)  
 Romania (18)  
 Belgium (17)  
 Slovakia (13)

## Top10 investing\*\* countries globally

United States (196)  
 Finland (143)  
 Germany (86)  
 United Kingdom (85)  
 Japan (84)  
 Sweden (76)  
 Canada (69)  
 Austria (58)  
 Switzerland (53)  
 Italy (49)

## Top10 investing countries, Europe

Finland (143)  
 Germany (86)  
 United Kingdom (85)  
 Sweden (76)  
 Austria (58)  
 Switzerland (53)  
 Italy (49)  
 Belgium (32)  
 Netherlands (32)  
 Ireland (30)

\*In total, globally and in all sectors, between 2008 and 2018, 28% of all investment projects happened in Europe

\*\* Based on number of investment projects in the sector



## SUB-SECTOR: CONVERTED PAPER PRODUCTS

» 1,9% of all project globally, 2014 - 2018

**Sector:** paper, printing & packaging

» 2,6% of all projects globally, 2014 – 2018

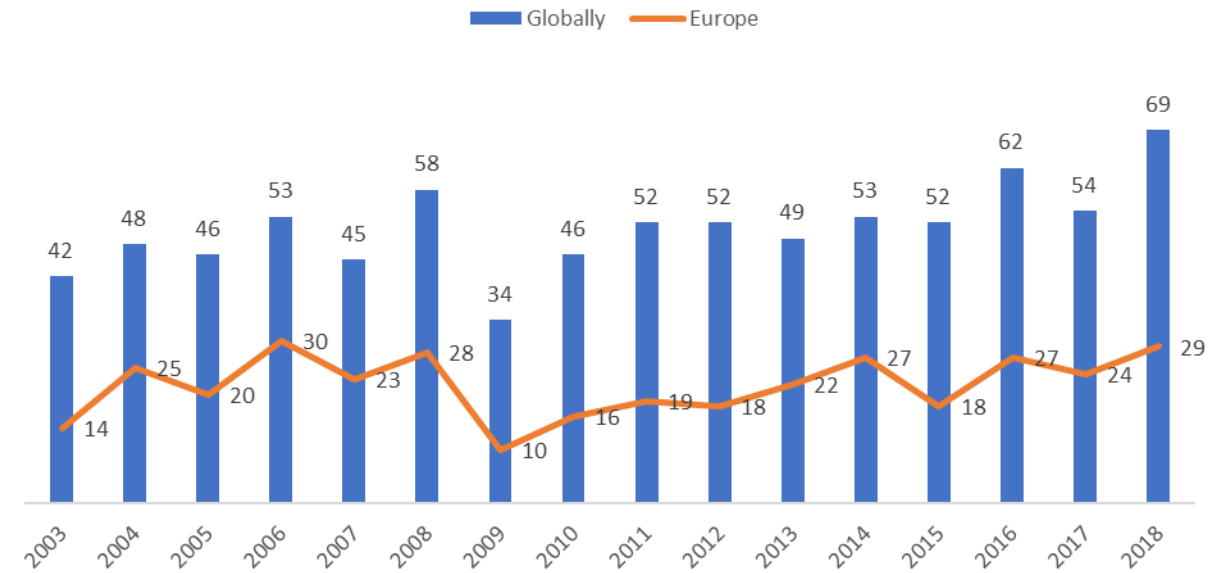
**Clusters:** agribusiness; construction; consumer goods; creative industries; ICT & electronics; industrial; life science; physical science; transport equipment; wood, apparel & related products

**Number of projects in Lithuania:** 1 (2015)

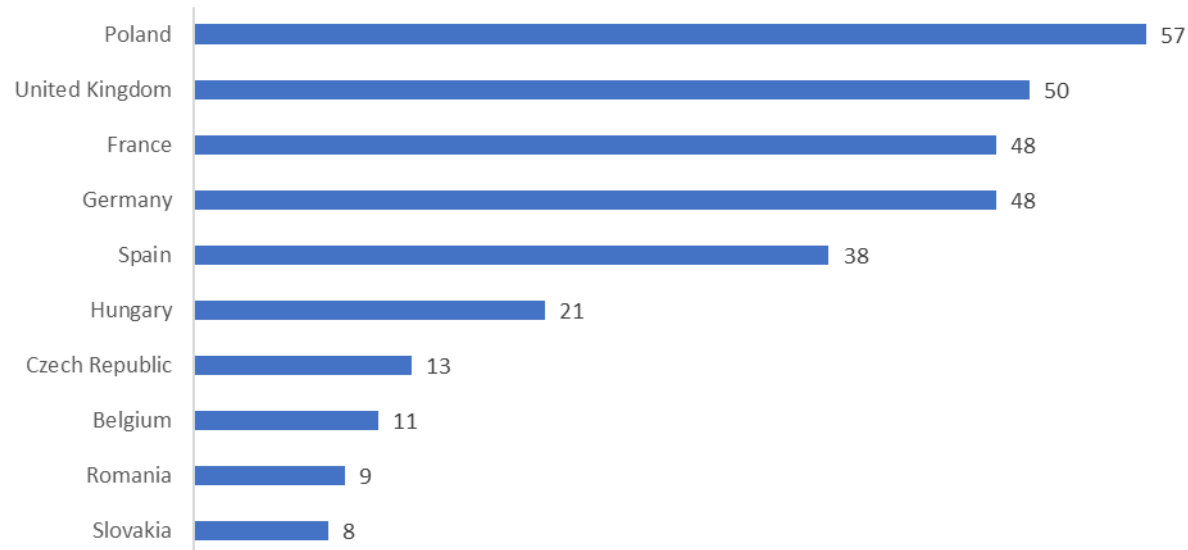
**Share of green-field projects:** 51%

**Percentage of investment projects in Europe (2014 – 2018):** 43%

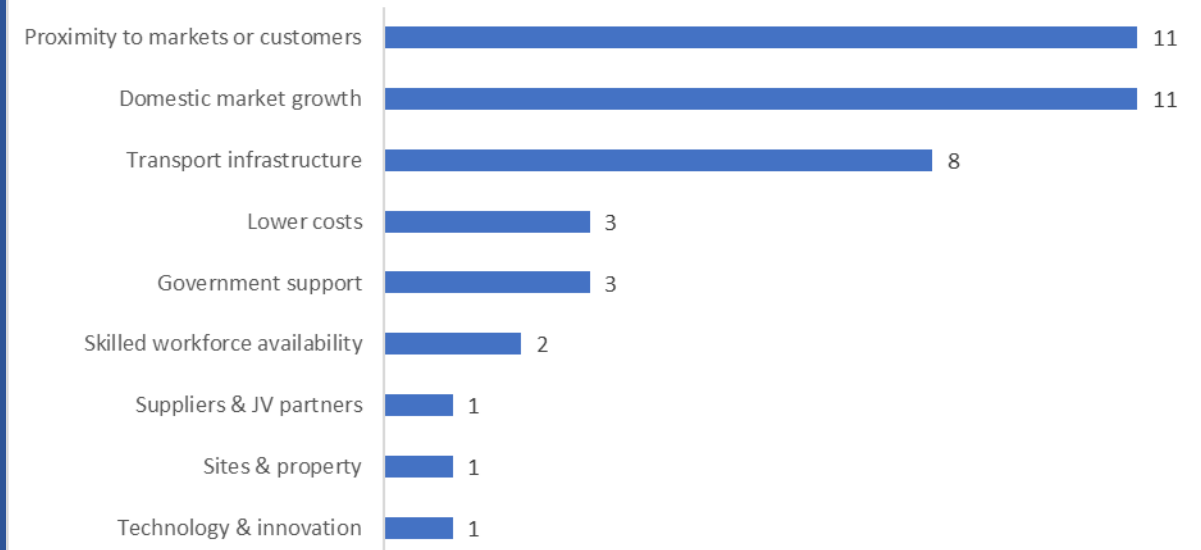
### Number of Projects, 2003 - 2018



### Top 10 Destination Countries in Europe, 2003 - 2018



### Motives & Determinants, Europe 2003 - 2018



## SUB-SECTOR: PULP, PAPER & PAPERBOARD

» 0,4% of all project globally, 2014 - 2018

**Sector:** paper, printing & packaging

» 2,6% of all projects globally, 2014 – 2018

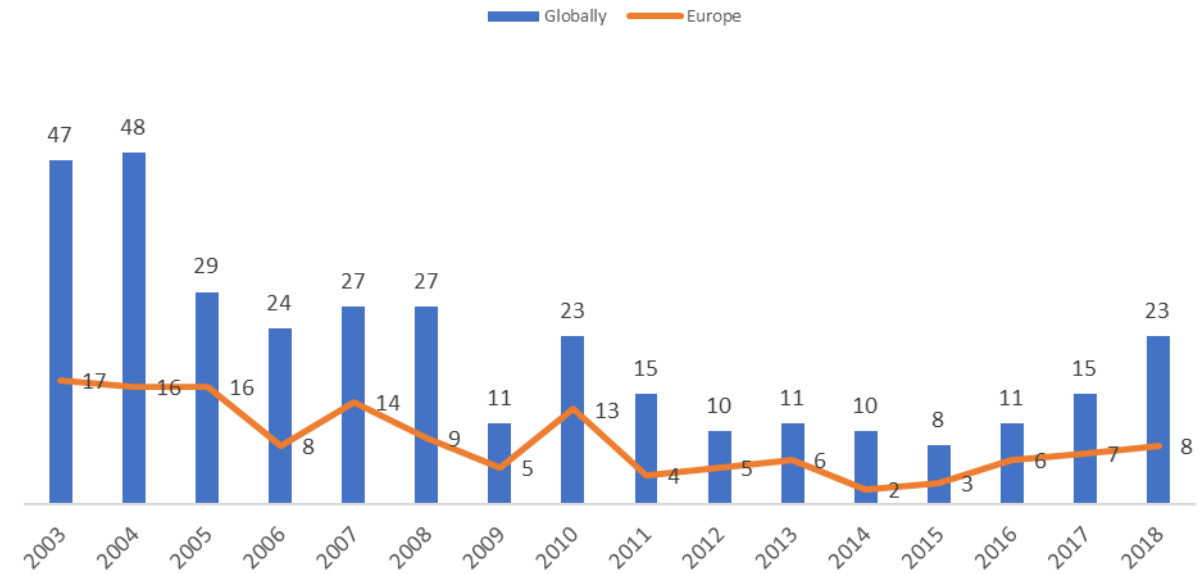
**Clusters:** agribusiness; consumer goods; creative industries; environmental technology; financial services; ICT & electronics; industrial; transport equipment; wood; apparel & related products

**Number of projects in Lithuania:** 1 (2006)

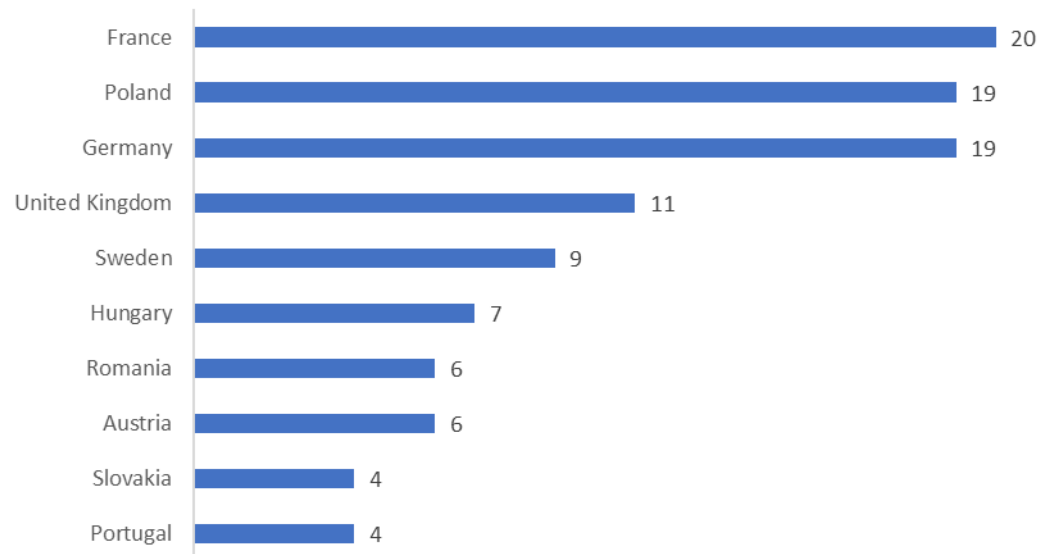
**Share of green-field projects:** 52%

**Percentage of investment projects in Europe (2014 – 2018):** 39%

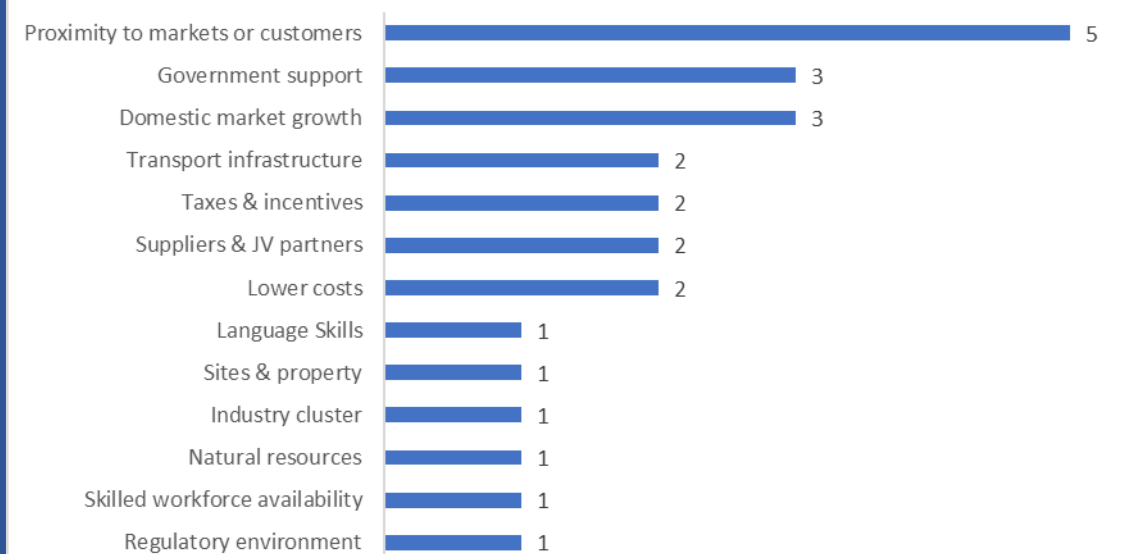
## Number of Projects, 2003 - 2018



## Top 10 Destination Countries in Europe, 2003 - 2018



## Motives & Determinants, Europe 2003 - 2018



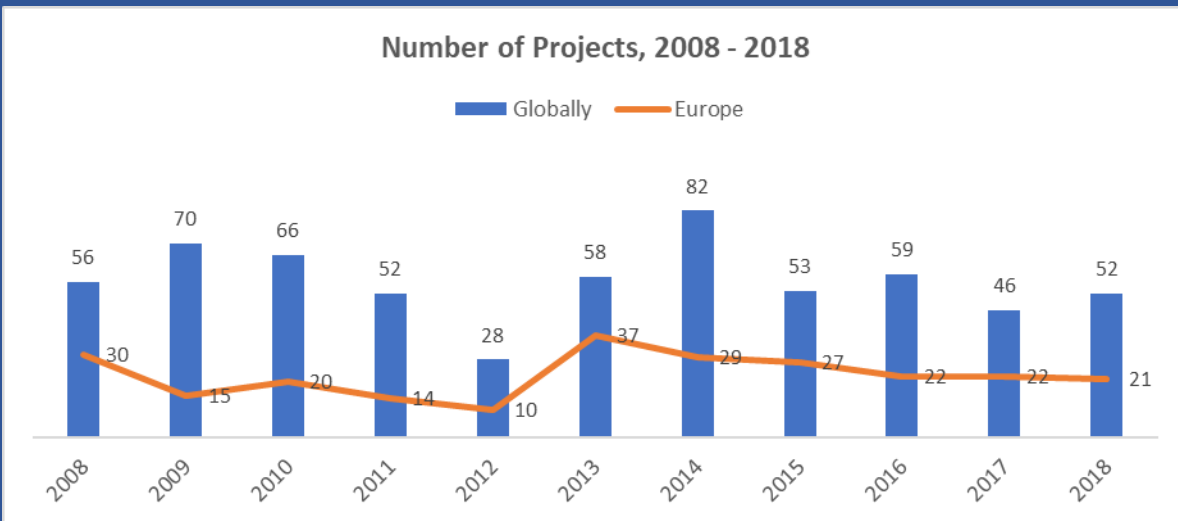
# MEDICAL DEVICES

## In the last 10 years (2008 – 2018):

- Number of projects globally: 622
- Number of projects in Europe: 247
- 40% of all investment projects in this sector happened in Europe\*

## In the last 4 years (2014 – 2018):

- 1,9% of all investment projects happened in this sector



### Top10 destination\*\* countries globally

- China (95)
- United States (93)
- Ireland (68)
- Costa Rica (57)
- United Kingdom (47)
- France (44)
- Mexico (44)
- Germany (37)
- India (35)
- Malaysia (23)

### Top10 destination countries, Europe

- Ireland (68)
- United Kingdom (47)
- France (44)
- Germany (37)
- Hungary (20)
- Czech Republic (17)
- Spain (16)
- Poland (13)
- Serbia (12)
- Slovakia (11)

### Top10 investing\*\* countries globally

- United States (331)
- Germany (148)
- Japan (56)
- United Kingdom (40)
- Denmark (28)
- Switzerland (26)
- Sweden (23)
- Ireland (19)
- Austria (18)
- Netherlands (16)

### Top10 investing countries, Europe

- Germany (148)
- United Kingdom (40)
- Denmark (28)
- Switzerland (26)
- Sweden (23)
- Ireland (19)
- Austria (18)
- Netherlands (16)
- France (14)
- Italy (14)

\*In total, globally and in all sectors, between 2008 and 2018, 28% of all investment projects happened in Europe

\*\* Based on number of investment projects in the sector

## SUB-SECTOR: MEDICAL EQUIPMENT & SUPPLIES

» 1,5% of all project globally, 2014 - 2018

**Sector:** medical devices

» 1,9% of all projects globally, 2014 – 2018

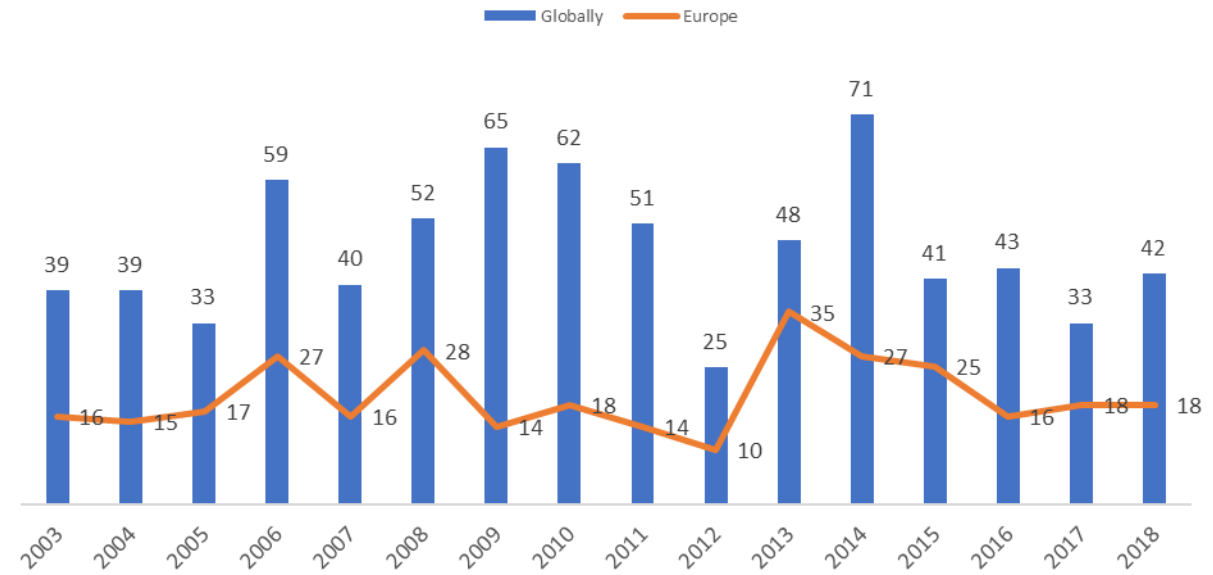
**Clusters:** life sciences; ICT & electronics; physical science

**Number of projects in Lithuania:** 5 (2003; 2012; 2015; 2017;2018)

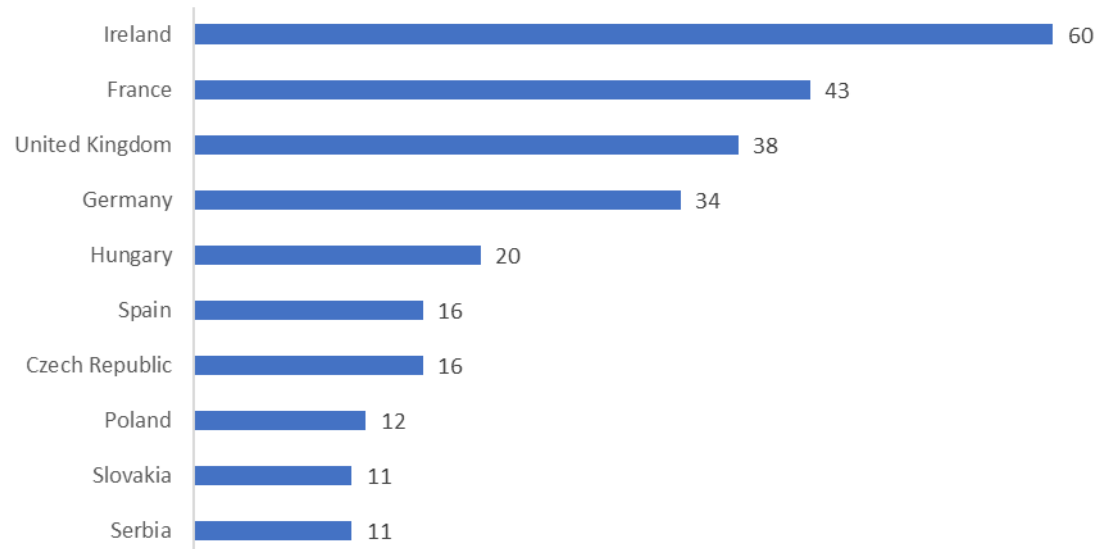
**Share of green-field projects:** 53%

**Percentage of investment projects in Europe (2014 – 2018):** 45%

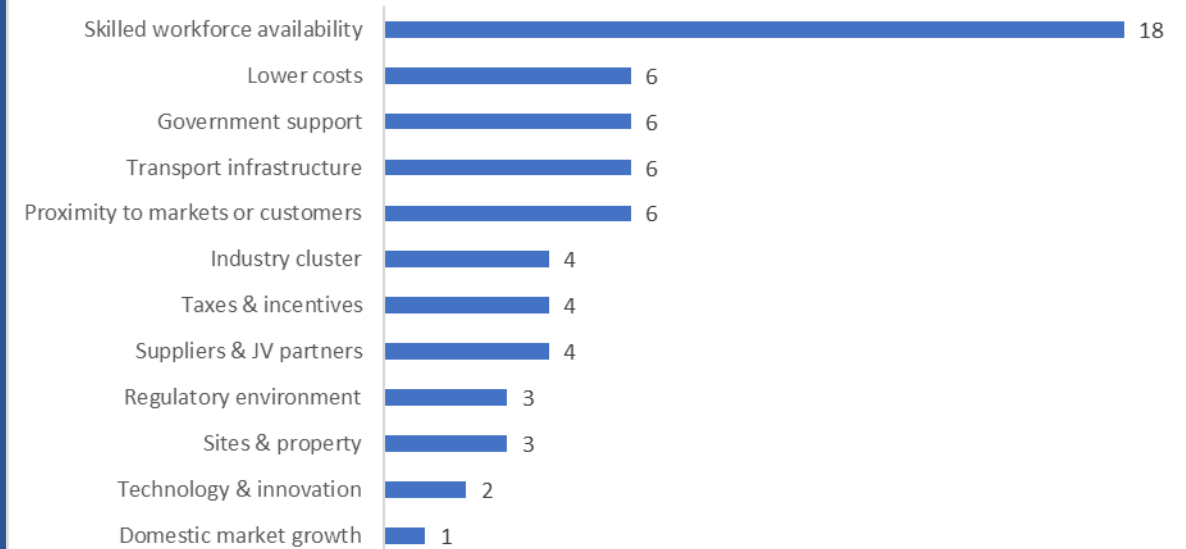
### Number of Projects, 2003 - 2018



### Top 10 Destination Countries in Europe, 2003 - 2018



### Motives & Determinants, Europe 2003 - 2018



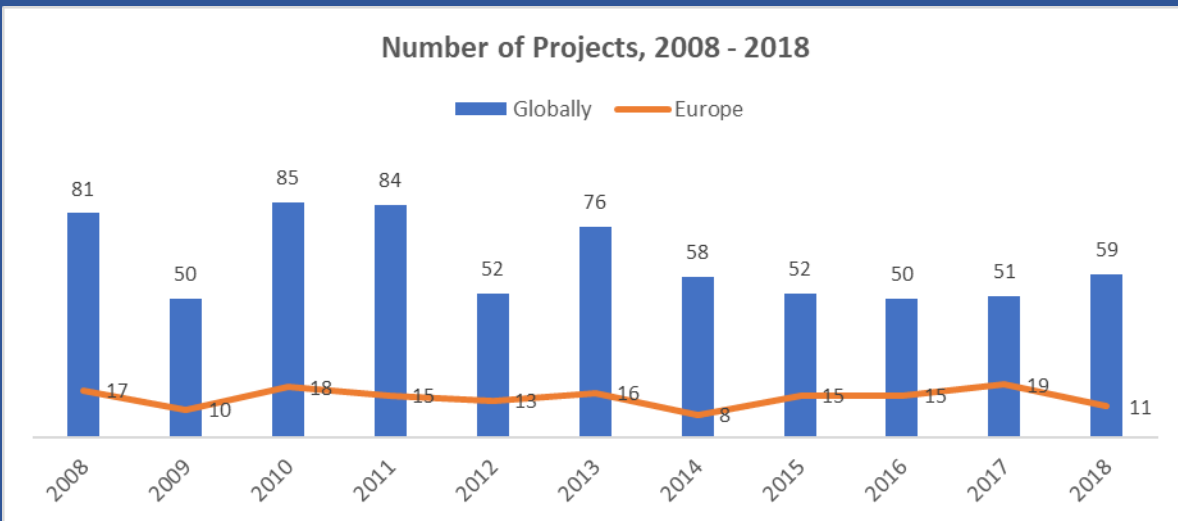
# RUBBER

## In the last 10 years (2008 – 2018):

- Number of projects globally: 698
- Number of projects in Europe: 157
- 23% of all investment projects in this sector happened in Europe\*

## In the last 4 years (2014 – 2018):

- 1,8% of all investment projects happened in this sector



## Top10 destination\*\* countries globally

China (207)  
 United States (127)  
 Thailand (70)  
 India (53)  
 Mexico (47)  
 Brazil (43)  
 Russia (32)  
 Vietnam (30)  
 Romania (29)  
 Germany (25)

## Top10 destination countries, Europe

Romania (29)  
 Germany (25)  
 Poland (22)  
 Hungary (21)  
 Spain (21)  
 Czech Republic (19)  
 United Kingdom (18)  
 France (12)  
 Serbia (12)  
 Belgium (9)

## Top10 investing\*\* countries globally

Japan (292)  
 United States (123)  
 Germany (119)  
 France (102)  
 Italy (67)  
 South Korea (49)  
 Taiwan (42)  
 Sweden (30)  
 China (24)  
 Malaysia (24)

## Top10 investing countries, Europe

Germany (119)  
 France (102)  
 Italy (67)  
 Sweden (30)  
 Finland (17)  
 United Kingdom (17)  
 Switzerland (16)  
 Netherlands (10)  
 Austria (8)  
 Belgium (5)

\*In total, globally and in all sectors, between 2008 and 2018, 28% of all investment projects happened in Europe

\*\* Based on number of investment projects in the sector

## SUB-SECTOR: TYRES

» 1% of all project globally, 2014 - 2018

### Sector: rubber

» 1,8% of all projects globally, 2014 - 2018

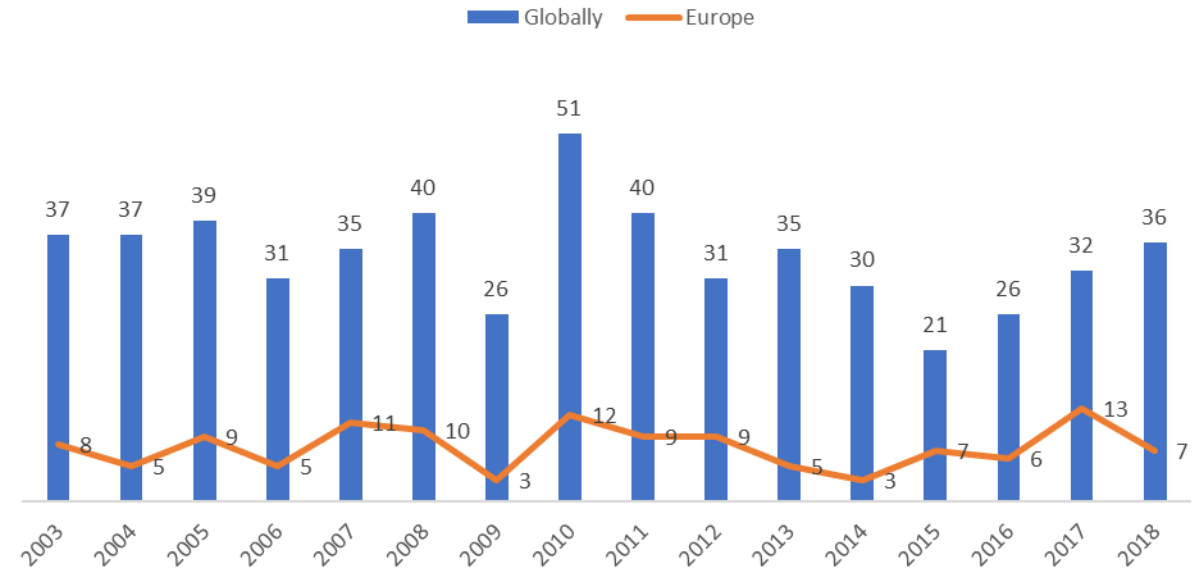
**Clusters:** consumer goods; industrial; physical sciences; transport equipment

**Number of projects in Lithuania: 0**

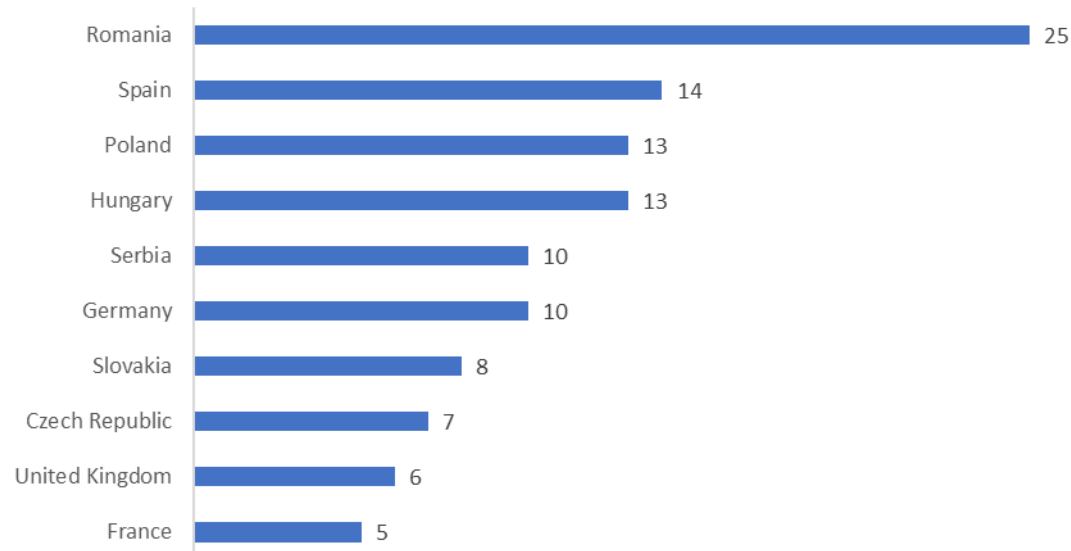
**Share of green-field projects: 44%**

**Percentage of investment projects in Europe (2014 – 2018): 24%**

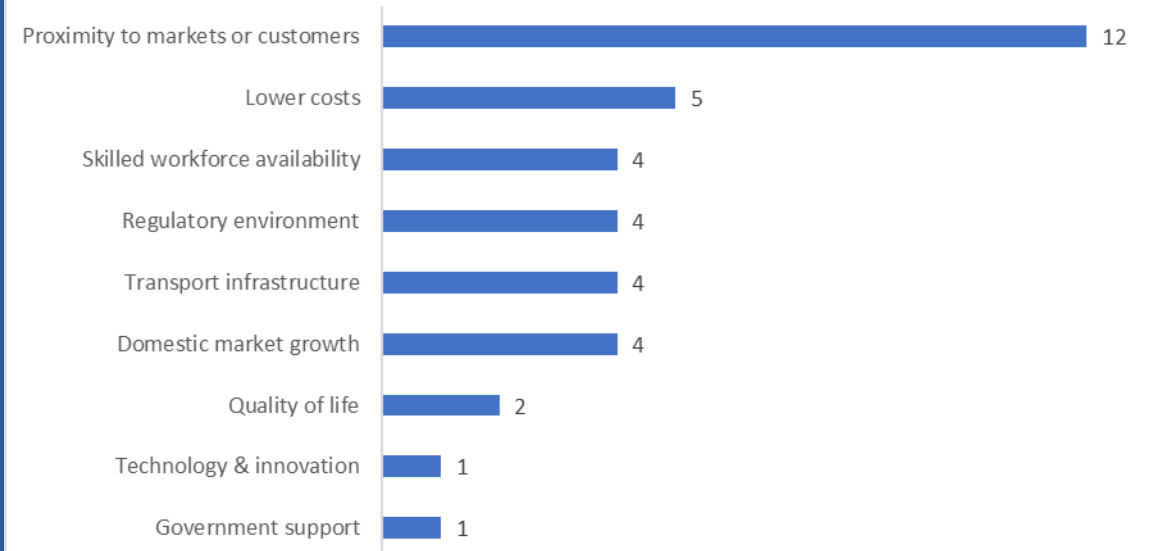
### Number of Projects, 2003 - 2018



### Top 10 Destination Countries in Europe, 2003 - 2018



### Motives & Determinants, Europe 2003 - 2018



## SUB-SECTOR: OTHER RUBBER PRODUCTS

» 0,6% of all project globally, 2014 - 2018

### Sector: rubber

» 1,8% of all projects globally, 2014 - 2018

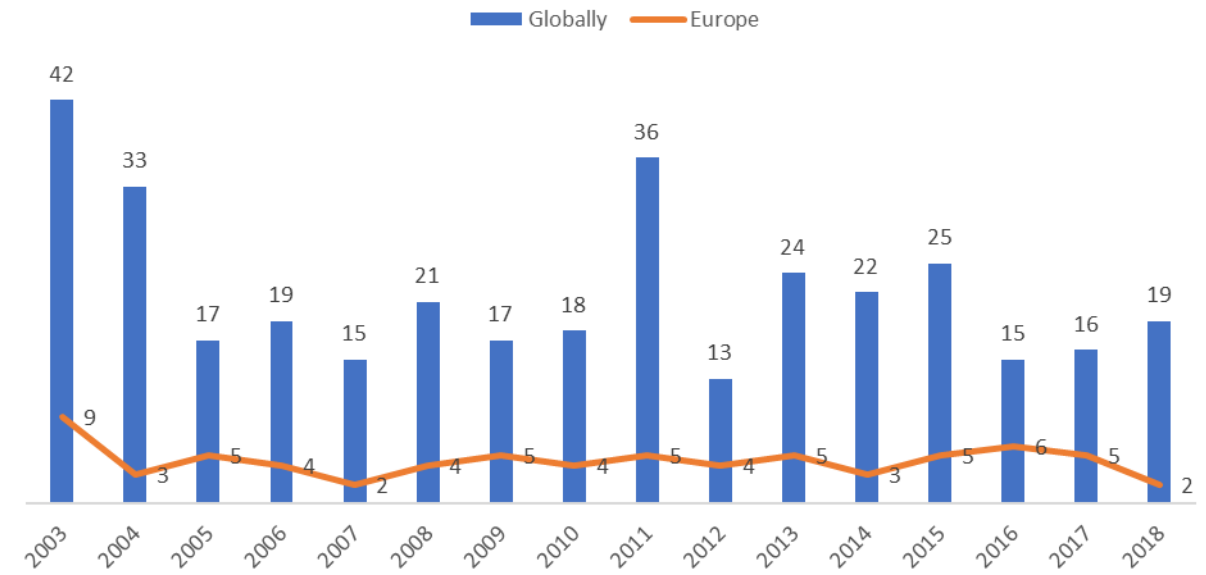
**Clusters:** energy; environmental technology; ICT & electronics; industrial; life science; physical science; transport equipment; transportation & warehousing; wood, apparel & related products

**Number of projects in Lithuania:** 4 (2003; 2015 (2); 2017)

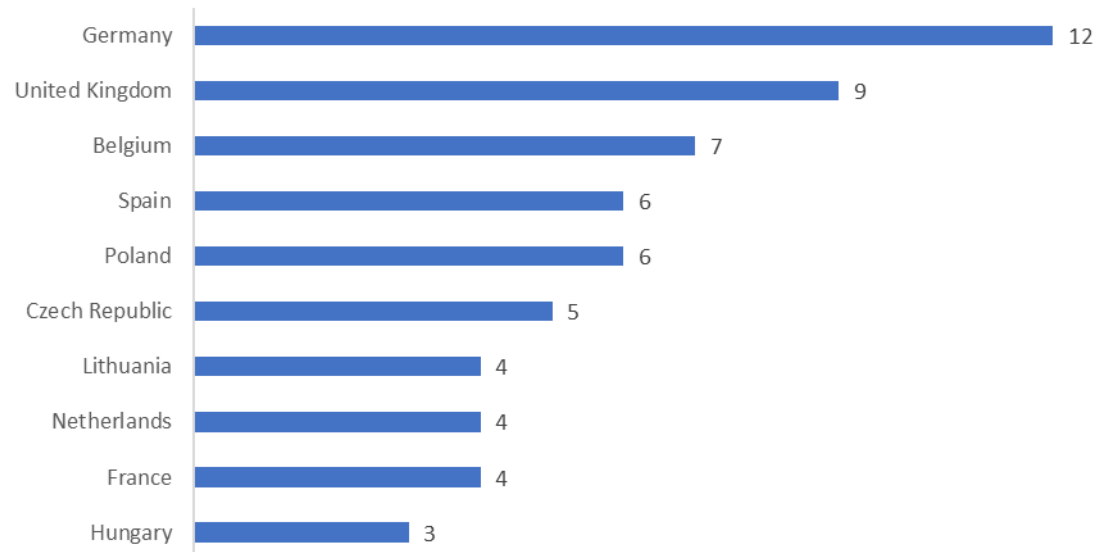
**Share of green-field projects:** 60%

**Percentage of investment projects in Europe (2014 – 2018):** 22%

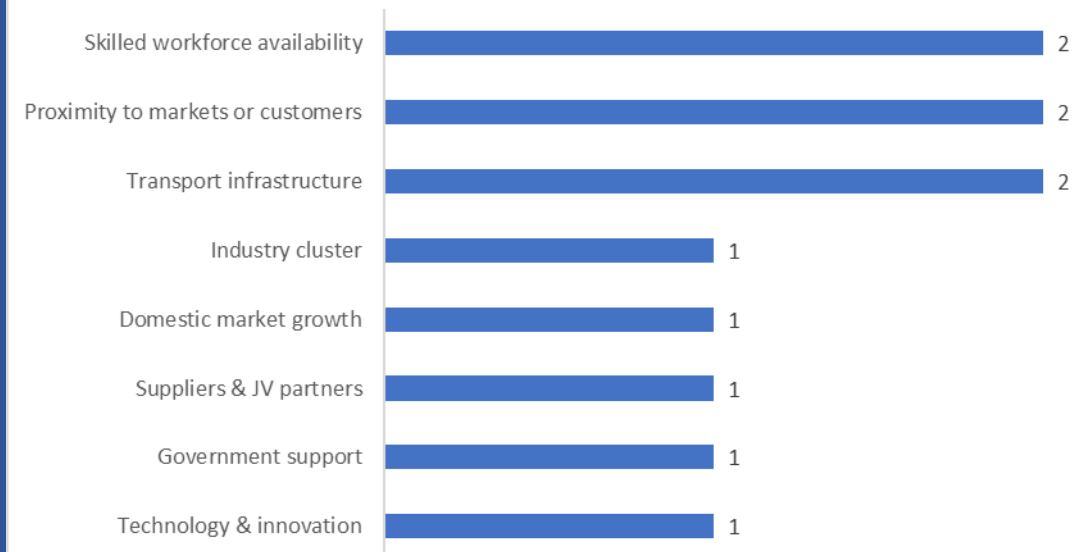
### Number of Projects, 2003 - 2018



### Top 10 Destination Countries in Europe, 2003 - 2018



### Motives & Determinants, Europe 2003 - 2018



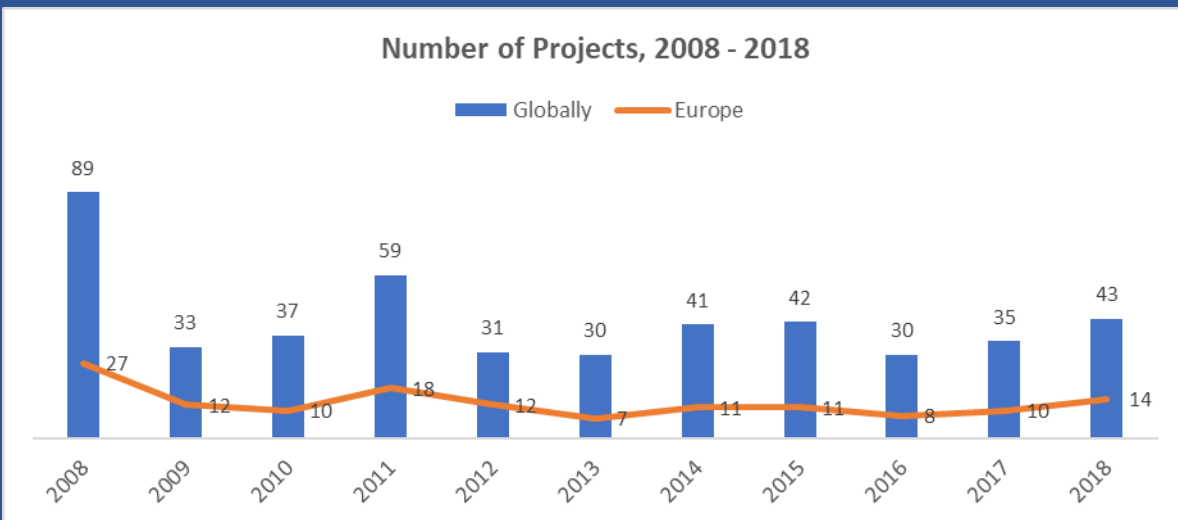
# CERAMICS & GLASS

## In the last 10 years (2008 – 2018):

- Number of projects globally: 470
- Number of projects in Europe: 140
- 30% of all investment projects in this sector happened in Europe\*

## In the last 4 years (2014 – 2018):

- 1,3% of all investment projects happened in this sector



### Top10 destination\*\* countries globally

China (81)  
 Russia (81)  
 United States (69)  
 India (50)  
 Poland (33)  
 Mexico (30)  
 Spain (30)  
 Bulgaria (29)  
 Vietnam (24)  
 Brazil (22)

### Top10 destination countries, Europe

Poland (33)  
 Spain (30)  
 Bulgaria (29)  
 Germany (22)  
 United Kingdom (18)  
 France (16)  
 Romania (16)  
 Czech Republic (13)  
 Hungary (13)  
 Ukraine (12)

### Top10 investing\*\* countries globally

Japan (135)  
 United States (106)  
 France (96)  
 Germany (61)  
 Italy (49)  
 China (37)  
 Turkey (33)  
 Spain (31)  
 United Kingdom (30)  
 Austria (27)

### Top10 investing countries, Europe

France (96)  
 Germany (61)  
 Italy (49)  
 Spain (31)  
 United Kingdom (30)  
 Austria (27)  
 Denmark (9)  
 Switzerland (9)  
 Poland (8)  
 Belgium (7)

\*In total, globally and in all sectors, between 2008 and 2018, 28% of all investment projects happened in Europe

\*\* Based on number of investment projects in the sector



## SUB-SECTOR: GLASS & GLASS PRODUCTS

» 1% of all project globally, 2014 - 2018

### Sector: ceramics & glass

» 1,3% of all projects globally, 2014 - 2018

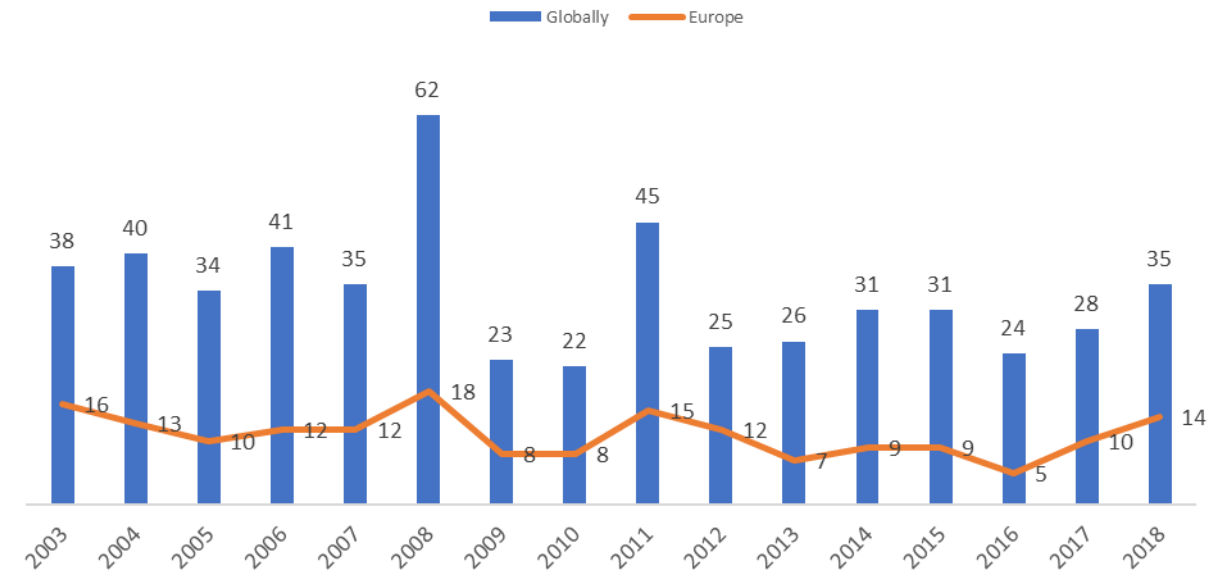
**Clusters:** agribusiness; construction; consumer goods; energy; environmental technology; ICT & electronics; industrial; life science; physical science; transport equipment; transportation & warehousing; wood, apparel & related products

**Number of projects in Lithuania:** 2 (2008; 2011)

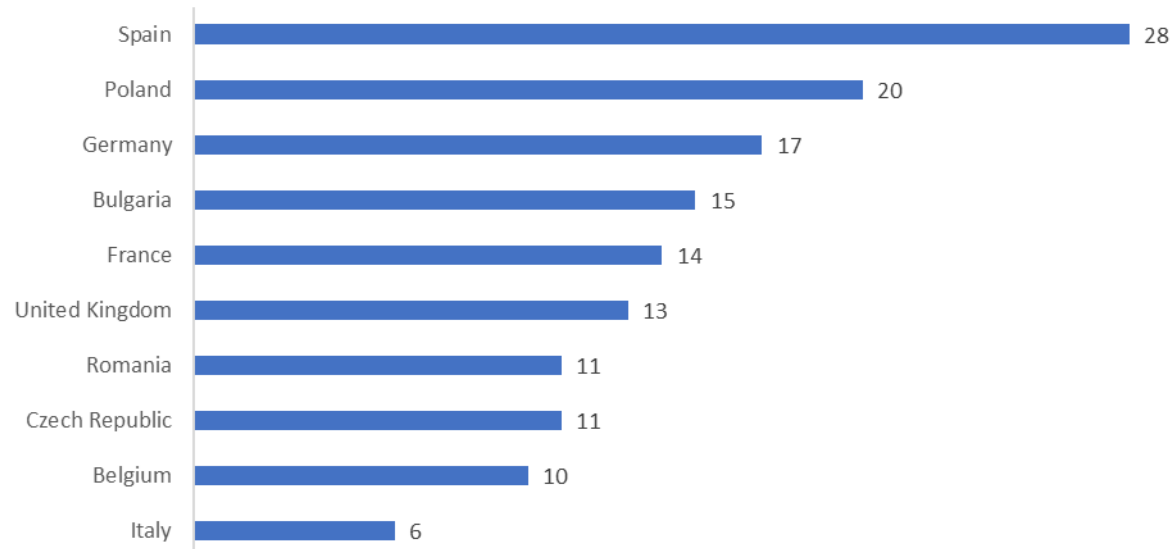
**Share of green-field projects:** 55%

**Percentage of investment projects in Europe (2014 – 2018):** 32%

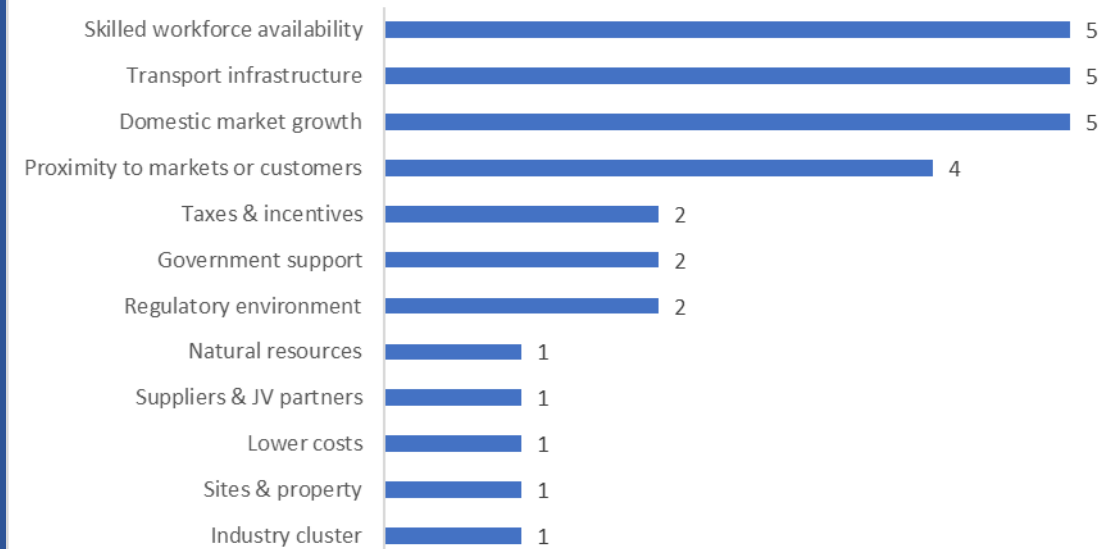
## Number of Projects, 2003 - 2018



## Top 10 Destination Countries in Europe, 2003 - 2018



## Motives & Determinants, Europe 2003 - 2018



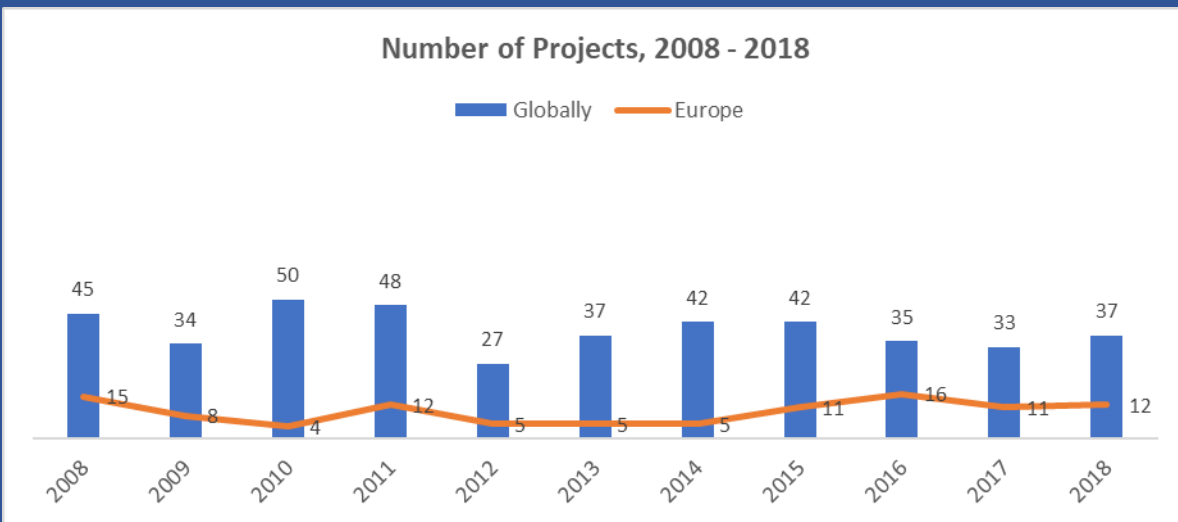
# NON-AUTOMOTIVE TRANSPORT OEM

## In the last 10 years (2008 – 2018):

- Number of projects globally: 430
- Number of projects in Europe: 104
- 24% of all investment projects in this sector happened in Europe\*

## In the last 4 years (2014 – 2018):

- 1,2% of all investment projects happened in this sector



### Top10 destination\*\* countries globally

- India (70)
- China (60)
- United States (51)
- Brazil (42)
- Vietnam (35)
- Indonesia (26)
- France (17)
- United Kingdom (17)
- Mexico (16)
- Germany (15)

### Top10 destination countries, Europe

- France (17)
- United Kingdom (17)
- Germany (15)
- Poland (14)
- Hungary (11)
- Spain (10)
- Finland (8)
- Czech Republic (7)
- Romania (7)
- Serbia (6)

### Top10 investing\*\* countries globally

- Japan (144)
- United States (50)
- Germany (45)
- Canada (38)
- China (34)
- Italy (31)
- France (30)
- South Korea (26)
- India (24)
- Taiwan (23)

### Top10 investing countries, Europe

- Germany (45)
- Italy (31)
- France (30)
- Switzerland (19)
- United Kingdom (15)
- Spain (14)
- Netherlands (13)
- Norway (10)
- Austria (5)
- Sweden (5)

\*In total, globally and in all sectors, between 2008 and 2018, 28% of all investment projects happened in Europe

\*\* Based on number of investment projects in the sector

## SUB-SECTOR: RAILROAD ROLLING STOCK

» 0,5% of all project globally, 2014 - 2018

**Sector:** non-automotive transport OEM

» 1,2% of all projects globally, 2014 – 2018

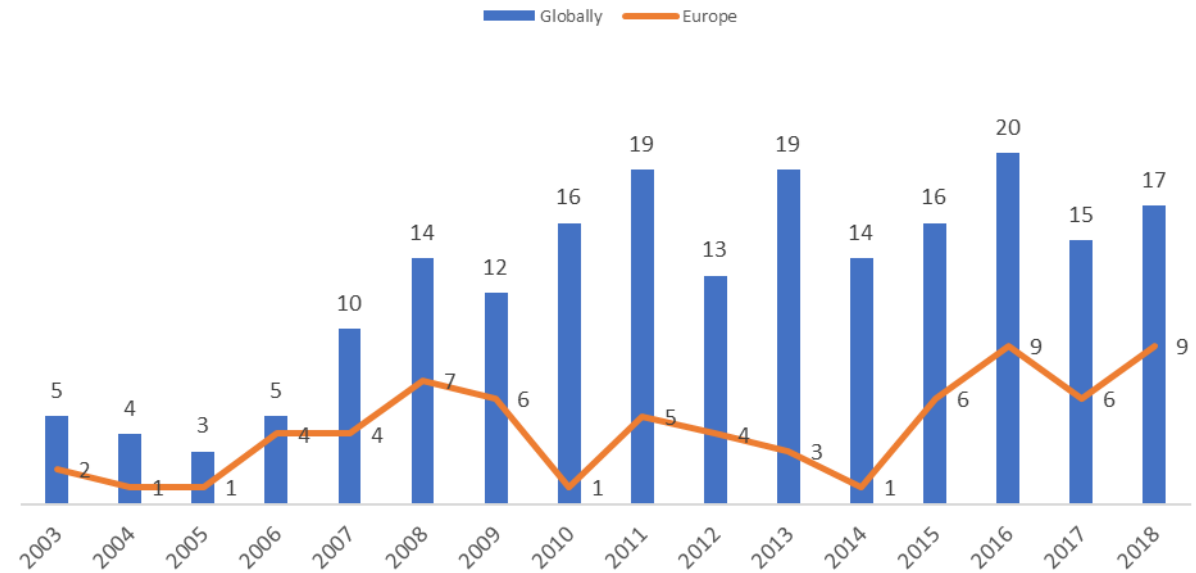
**Clusters:** industrial; transport equipment; transportation & warehousing

**Number of projects in Lithuania: 0**

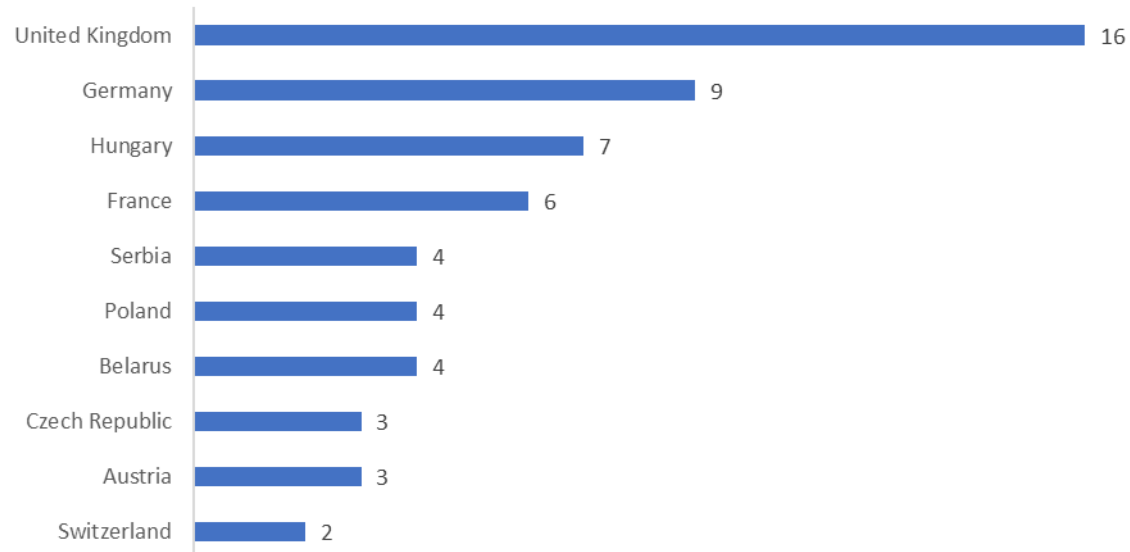
**Share of green-field projects: 69%**

**Percentage of investment projects in Europe (2014 – 2018): 43%**

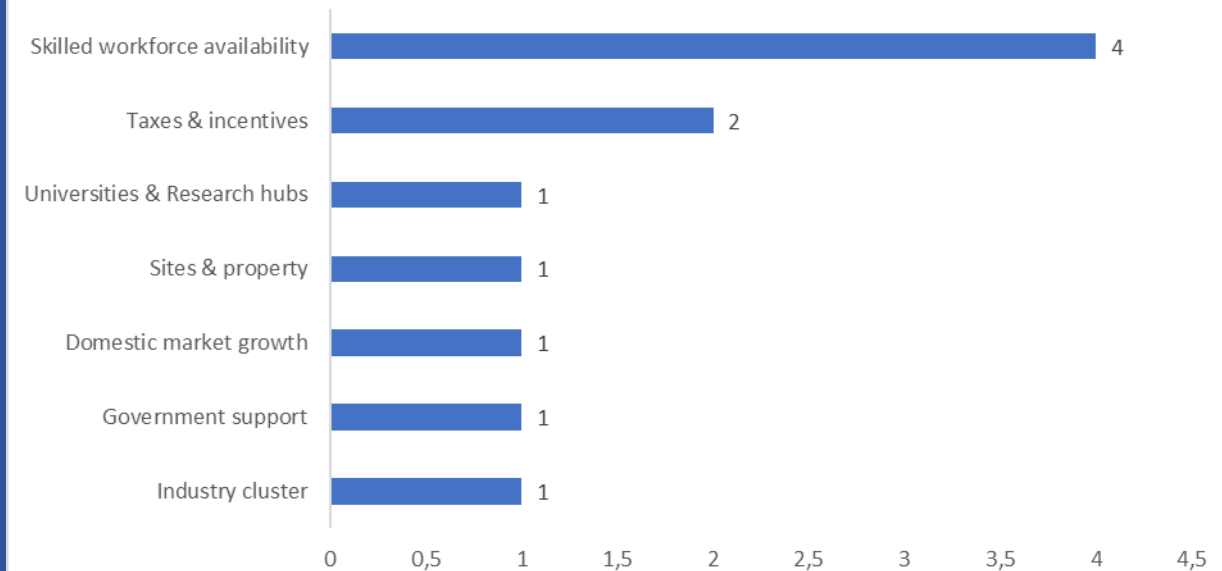
### Number of Projects, 2003 - 2018



### Top 10 Destination Countries in Europe, 2003 - 2018



### Motives & Determinants, Europe 2003 - 2018



## SUB-SECTOR: SHIPS & BOATS

» 0,2% of all project globally, 2014 - 2018

**Sector:** non-automotive transport OEM

» 1,2% of all projects globally, 2014 – 2018

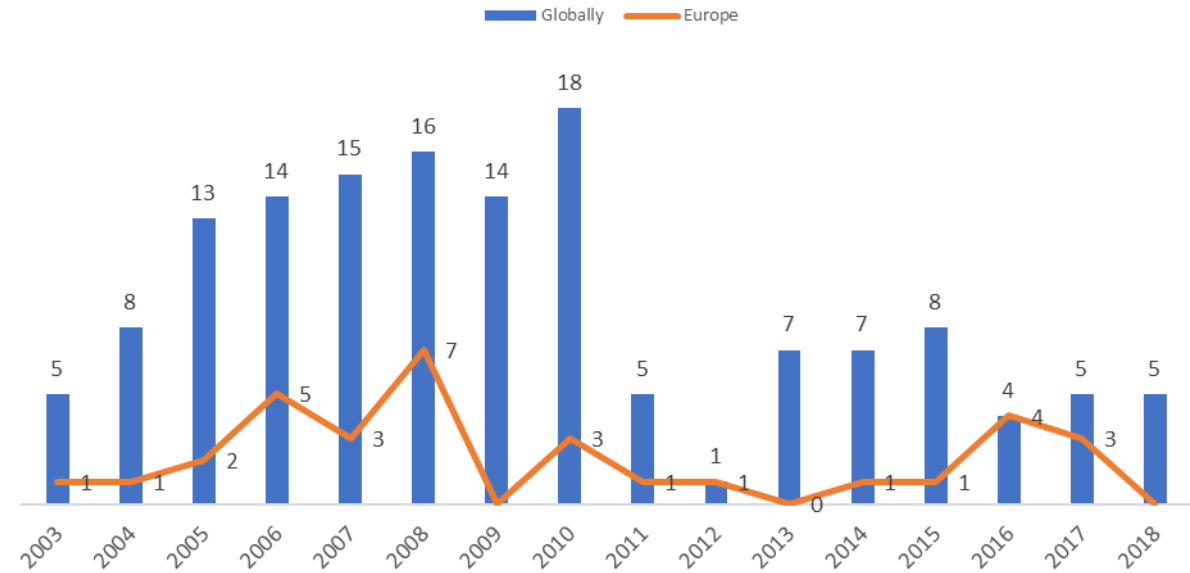
**Clusters:** energy; transport equipment

**Number of projects in Lithuania:** 2 (2008; 2019)

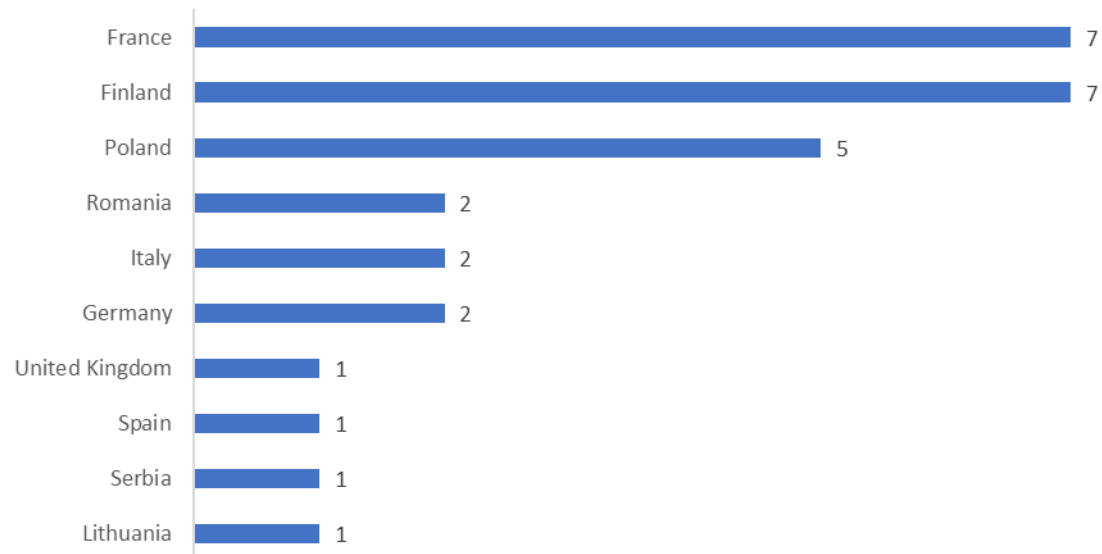
**Share of green-field projects:** 67%

**Percentage of investment projects in Europe (2014 – 2018):** 31%

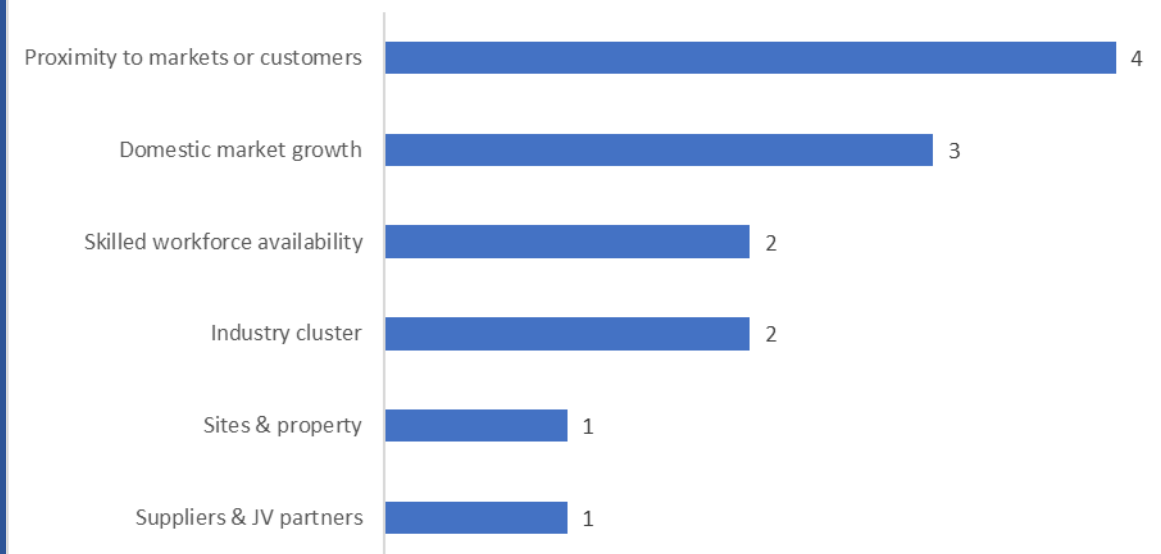
### Number of Projects, 2003 - 2018



### Top 10 Destination Countries in Europe, 2003 - 2018



### Motives & Determinants, Europe 2003 -2018



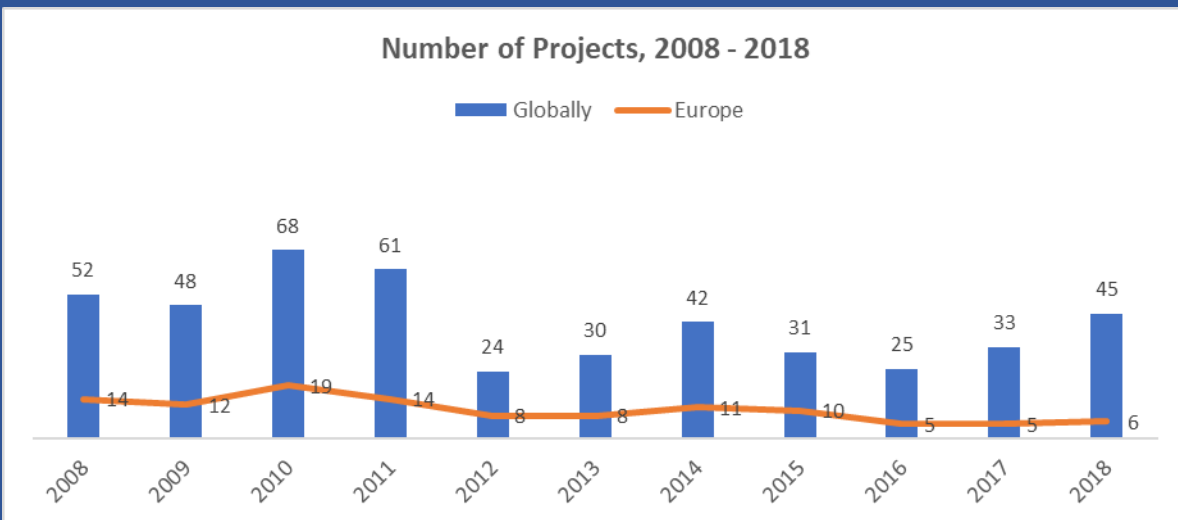
# CONSUMER ELECTRONICS

## In the last 10 years (2008 – 2018):

- Number of projects globally: 459
- Number of projects in Europe: 112
- 24% of all investment projects in this sector happened in Europe\*

## In the last 4 years (2014 – 2018):

- 1,2% of all investment projects happened in this sector



### Top10 destination\*\* countries globally

China (125)  
 India (82)  
 Mexico (74)  
 Poland (64)  
 Russia (46)  
 Thailand (42)  
 United States (35)  
 Vietnam (33)  
 Brazil (28)  
 Hungary (27)

### Top10 destination countries, Europe

Poland (64)  
 Hungary (27)  
 Romania (22)  
 Czech Republic (19)  
 United Kingdom (19)  
 Slovakia (18)  
 Serbia (11)  
 Spain (11)  
 Bulgaria (10)  
 Germany (9)

### Top10 investing\*\* countries globally

Japan (158)  
 South Korea (126)  
 China (91)  
 Germany (74)  
 United States (74)  
 Sweden (65)  
 Taiwan (65)  
 Italy (63)  
 Spain (17)  
 Netherlands (16)

### Top10 investing countries, Europe

Germany (74)  
 Sweden (65)  
 Italy (63)  
 Spain (17)  
 Netherlands (16)  
 Slovenia (11)  
 United Kingdom (11)  
 Switzerland (11)  
 France (7)  
 Ireland (6)

\*In total, globally and in all sectors, between 2008 and 2018, 28% of all investment projects happened in Europe

\*\* Based on number of investment projects in the sector

## SUB-SECTOR: HOUSEHOLD APPLIANCES

» 0,7% of all project globally, 2014 - 2018

**Sector:** consumer electronics

» 1,2% of all projects globally, 2014 – 2018

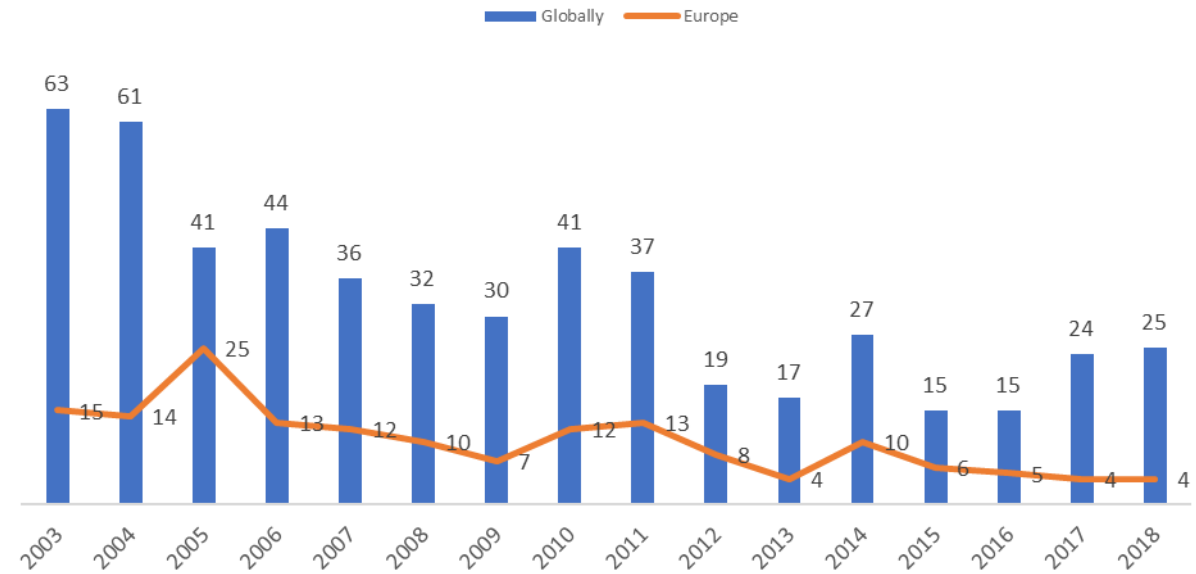
**Clusters:** consumer goods; environmental technology; ICT & electronics; transport equipment

**Number of projects in Lithuania:** 3 (2005; 2007; 2015)

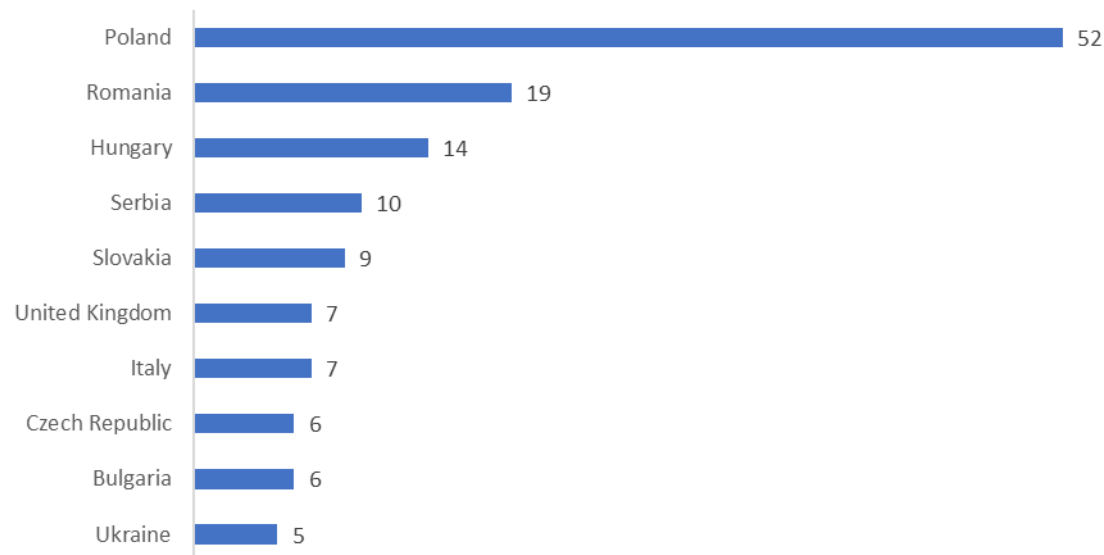
**Share of green-field projects:** 61%

**Percentage of investment projects in Europe (2014 – 2018):** 27%

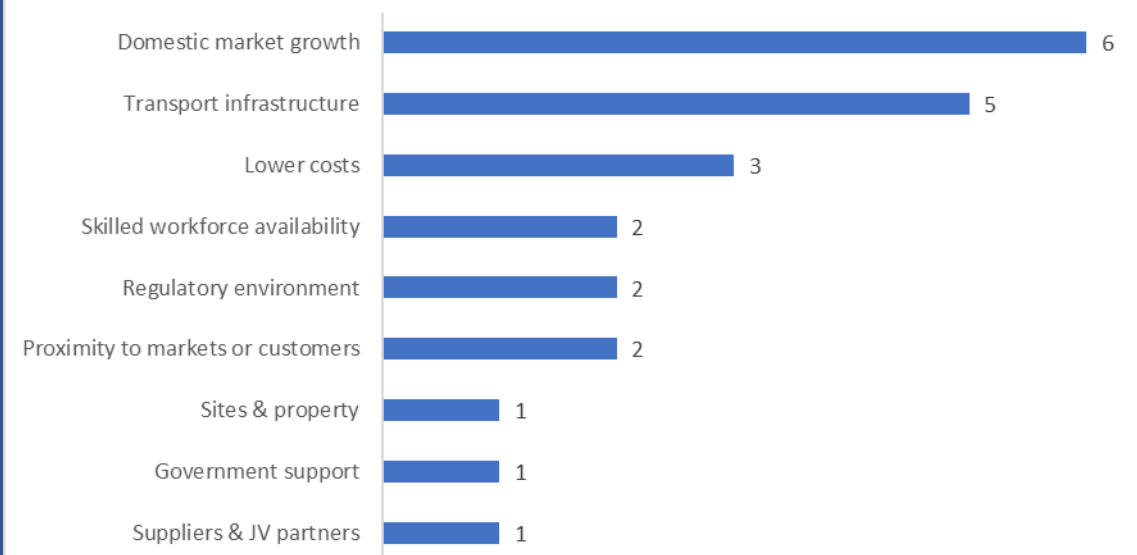
### Number of Projects, 2003 - 2018



### Top 10 Destination Countries in Europe, 2003 - 2018



### Motives & Determinants, Europe 2003 - 2018



## SUB-SECTOR: AUDIO & VIDEO EQUIPMENT

» 0,5% of all project globally, 2014 - 2018

**Sector:** consumer electronics; electronic components

» 1,2% & 5,8% of all projects globally, 2014 - 2018

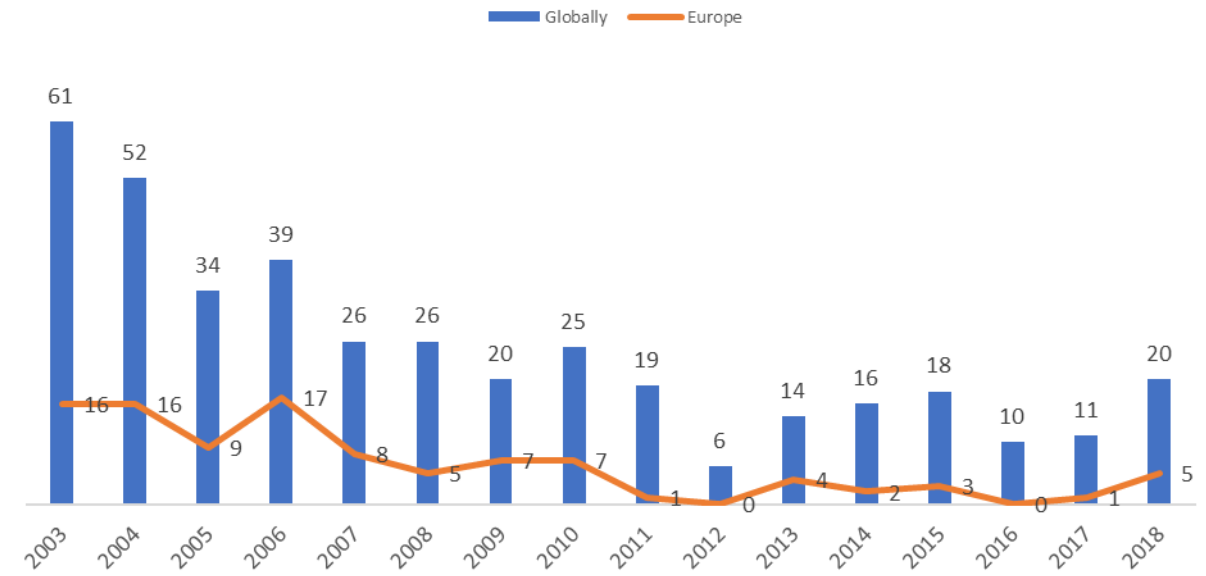
**Clusters:** consumer goods; ICT & electronics; industrial; retail trade; transport equipment

**Number of projects in Lithuania:** 1 (2004)

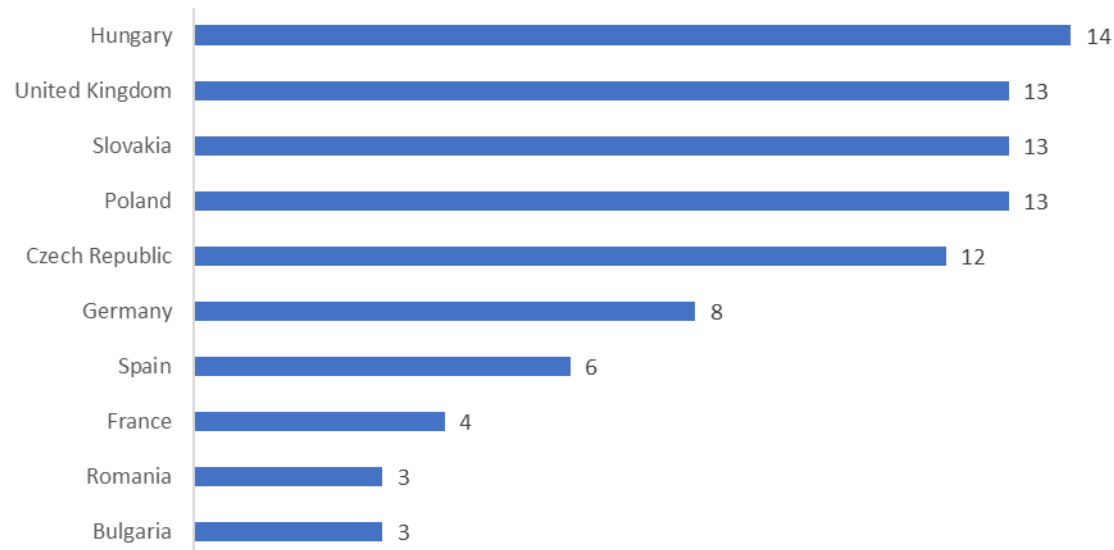
**Share of green-field projects:** 70%

**Percentage of investment projects in Europe (2014 – 2018):** 15%

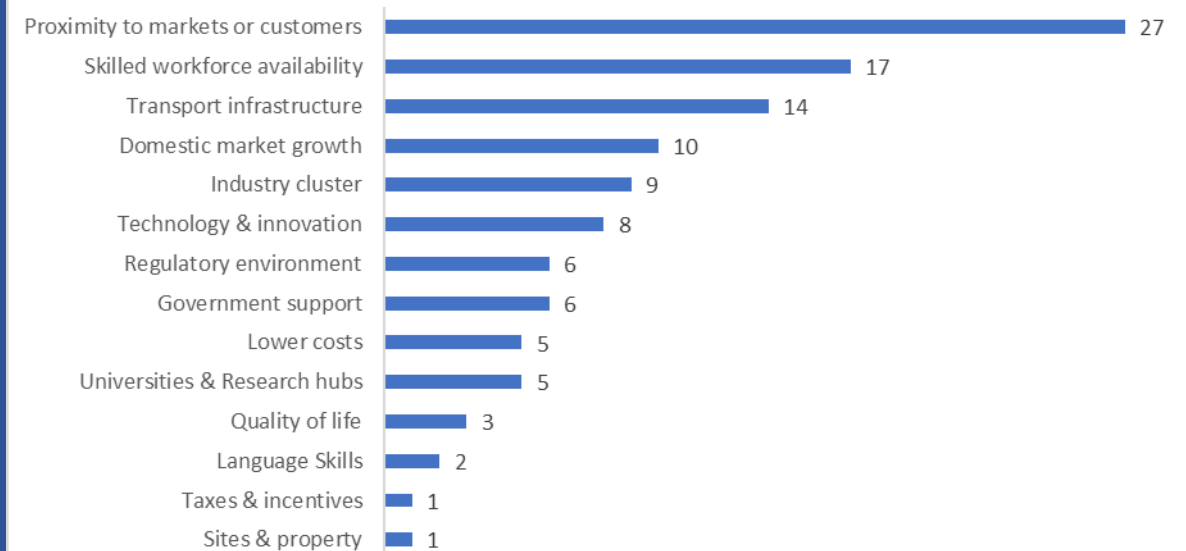
### Number of Projects, 2003 - 2018



### Top 10 Destination Countries in Europe, 2003 - 2018



### Motives & Determinants, Europe 2003 - 2018



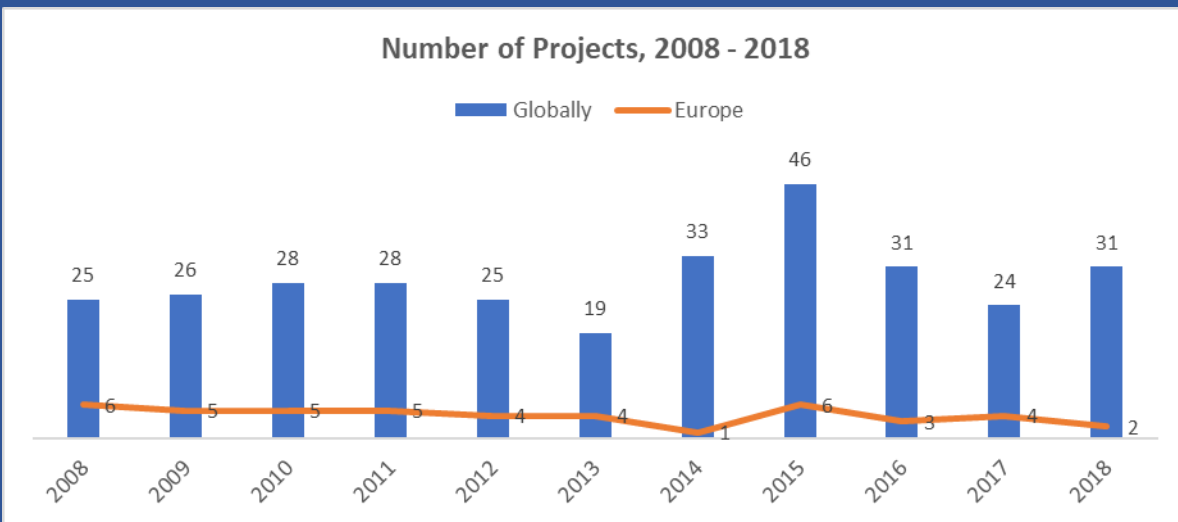
# COMMUNICATIONS

## In the last 10 years (2008 – 2018):

- Number of projects globally: 316
- Number of projects in Europe: 45
- 14% of all investment projects in this sector happened in Europe\*

## In the last 4 years (2014 – 2018):

- 1,1% of all investment projects happened in this sector



### Top10 destination\*\* countries globally

- India (112)
- China (105)
- Brazil (40)
- Mexico (32)
- Hungary (27)
- Vietnam (26)
- United States (13)
- Thailand (11)
- Malaysia (9)
- Romania (9)

### Top10 destination countries, Europe

- Hungary (27)
- Romania (9)
- Czech Republic (7)
- Estonia (7)
- France (7)
- Belgium (5)
- Bulgaria (5)
- United Kingdom (5)
- Poland (4)
- Austria (3)

### Top10 investing\*\* countries globally

- United States (106)
- China (68)
- Taiwan (58)
- Finland (52)
- South Korea (47)
- Japan (33)
- Germany (32)
- United Kingdom (23)
- France (21)
- Hong Kong (20)

### Top10 investing countries, Europe

- Finland (52)
- Germany (32)
- United Kingdom (23)
- France (21)
- Sweden (19)
- Netherlands (11)
- Italy (5)
- Austria (3)
- Norway (3)
- Switzerland (3)

\*In total, globally and in all sectors, between 2008 and 2018, 28% of all investment projects happened in Europe

\*\* Based on number of investment projects in the sector



## SUB-SECTOR: COMMUNICATIONS EQUIPMENT

» 1% of all project globally, 2014 - 2018

**Sector:** communications

» 1,1% of all projects globally, 2014 - 2018

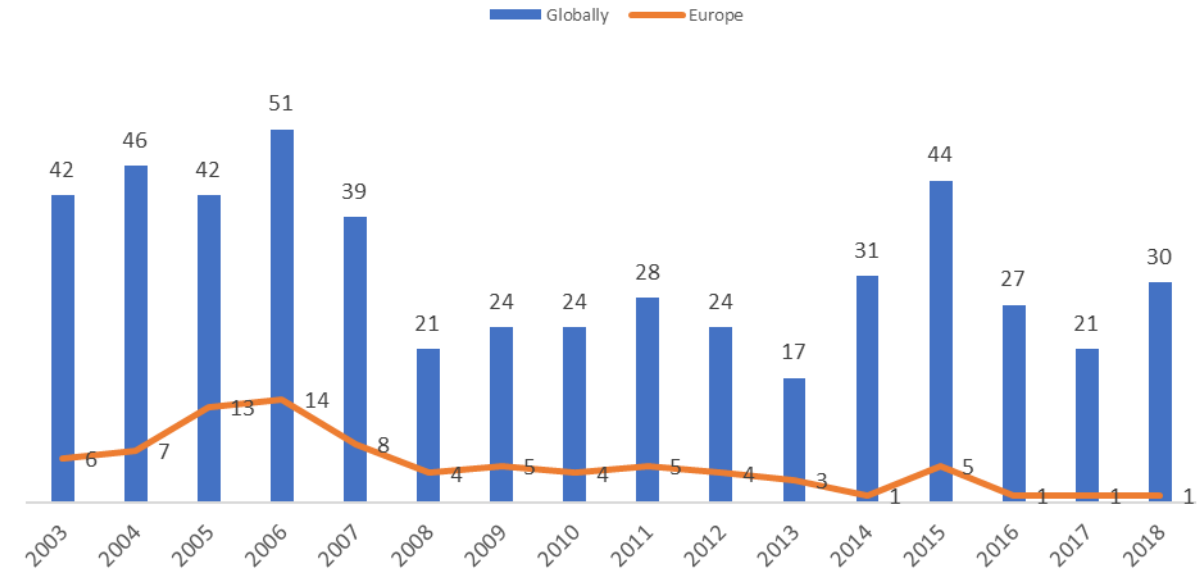
**Clusters:** consumer goods; creative industries; energy; environmental technology; ICT & electronics; industrial; transport equipment

**Number of projects in Lithuania:** 1 (2013)

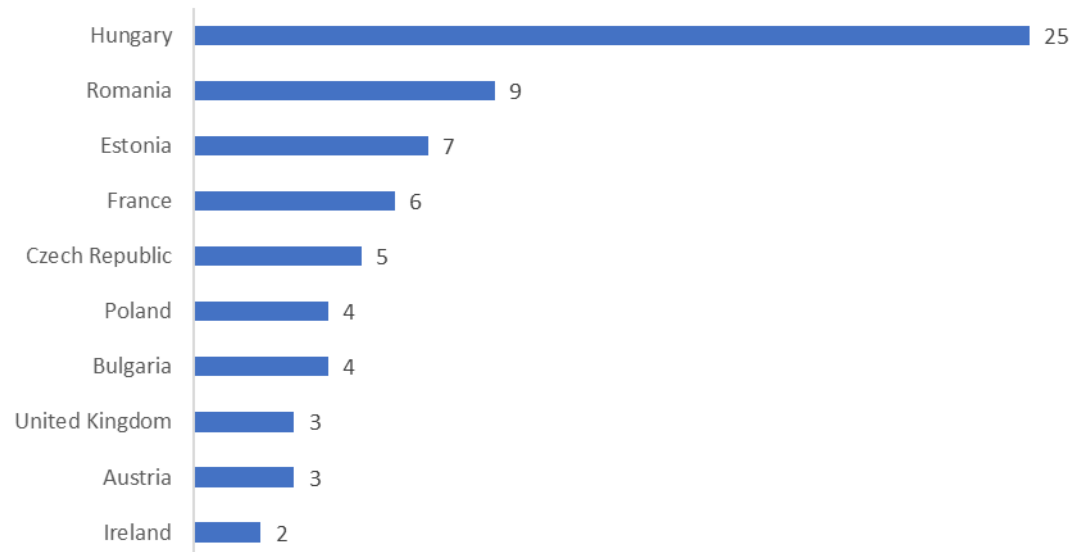
**Share of green-field projects:** 70%

**Percentage of investment projects in Europe (2014 – 2018):** 6%

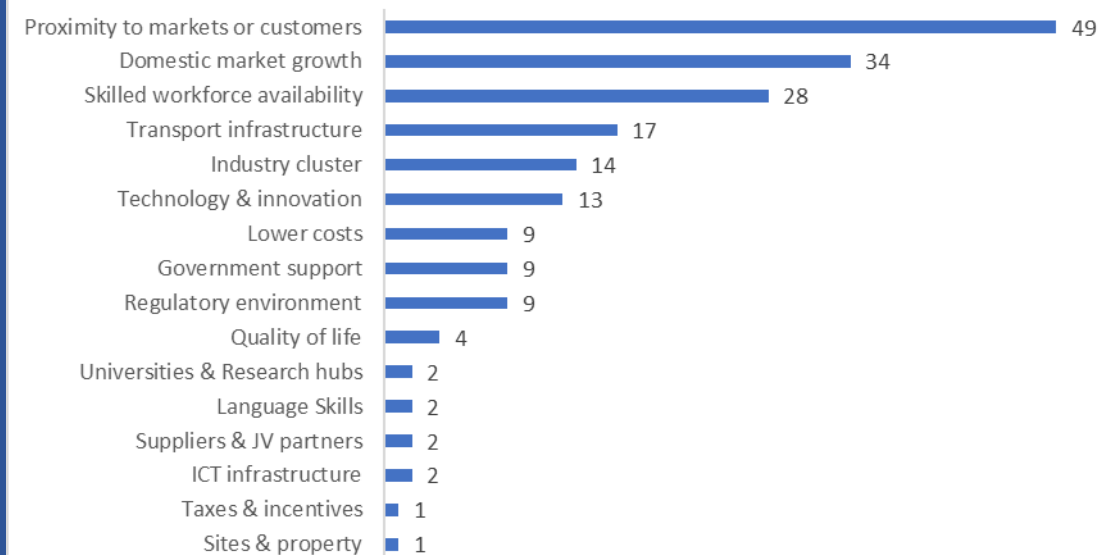
### Number of Projects, 2003 - 2018



### Top 10 Destination Countries in Europe, 2003 - 2018



### Motives & Determinants, Europe 2003 - 2018



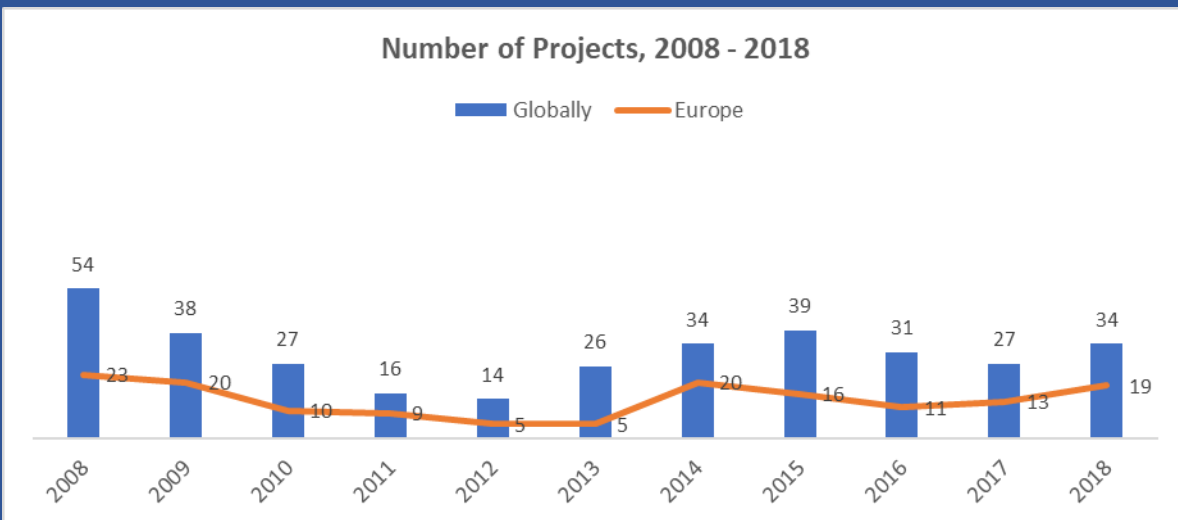
# WOOD PRODUCTS

## In the last 10 years (2008 – 2018):

- Number of projects globally: 340
- Number of projects in Europe: 151
- 44% of all investment projects in this sector happened in Europe\*

## In the last 4 years (2014 – 2018):

- 1,1% of all investment projects happened in this sector



## Top10 destination\*\* countries globally

Russia (103)  
 United States (63)  
 Poland (36)  
 Romania (34)  
 France (26)  
 Germany (26)  
 Canada (23)  
 China (22)  
 Vietnam (22)  
 Bulgaria (15)

## Top10 destination countries, Europe

Poland (36)  
 Romania (34)  
 Germany (26)  
 France (26)  
 Bulgaria (15)  
 Estonia (15)  
 United Kingdom (12)  
 Hungary (11)  
 Serbia (11)  
 Spain (11)

## Top10 investing\*\* countries globally

Sweden (51)  
 Germany (48)  
 Austria (47)  
 Cyprus (44)  
 Finland (42)  
 United States (33)  
 Italy (31)  
 Canada (29)  
 Japan (22)  
 China (21)

## Top10 investing countries, Europe

Sweden (51)  
 Germany (48)  
 Austria (47)  
 Finland (42)  
 Italy (31)  
 Portugal (19)  
 United Kingdom (17)  
 France (15)  
 Switzerland (15)  
 Poland (14)

\*In total, globally and in all sectors, between 2008 and 2018, 28% of all investment projects happened in Europe

\*\* Based on number of investment projects in the sector

## SUB-SECTOR: WOOD PRODUCTS

» 0,9% of all project globally, 2014 - 2018

### Sector: wood products

» 1,1% of all projects globally, 2014 – 2018

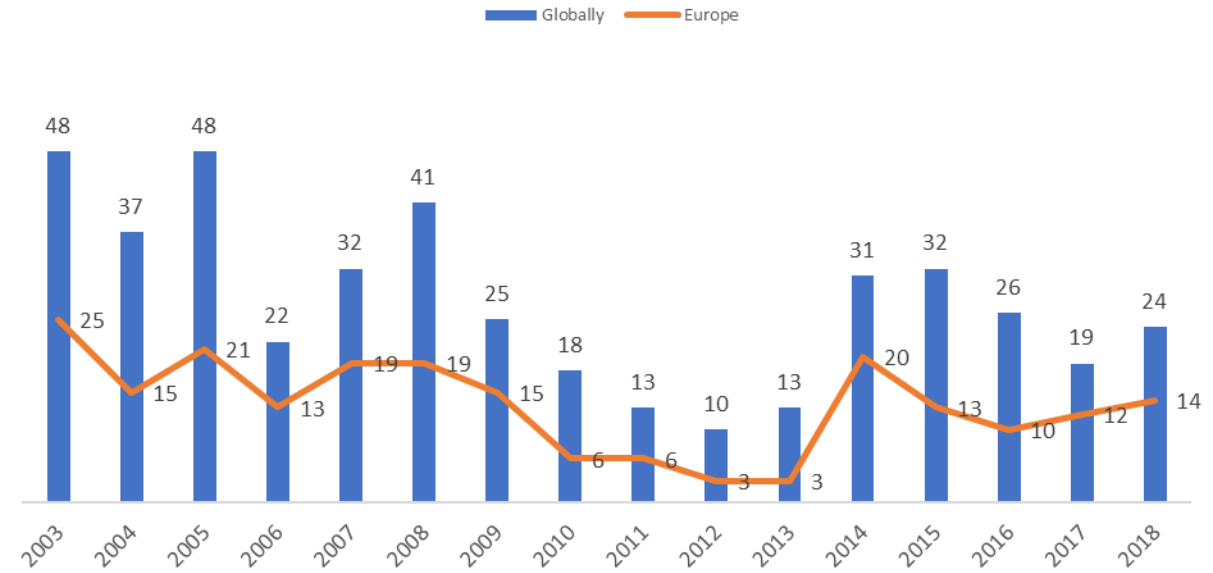
**Clusters:** agribusiness; construction; consumer goods; energy; environmental technology; industrial; transport equipment; transportation & warehousing; wood, apparel & related products

**Number of projects in Lithuania:** 3 (2003, 2007, 2019)

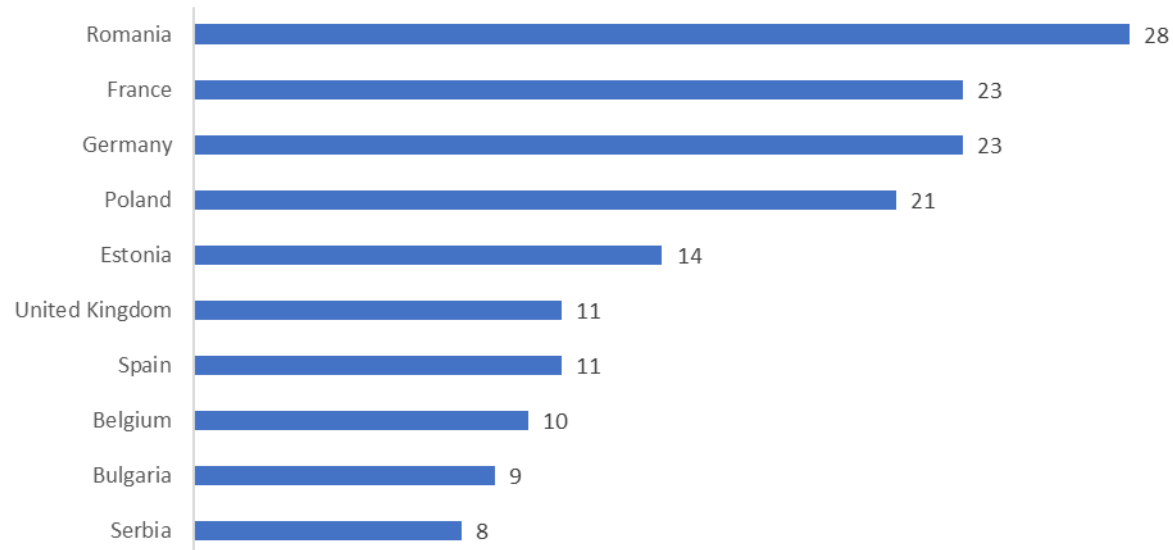
**Share of green-field projects:** 65%

**Percentage of investment projects in Europe (2014 – 2018):** 52%

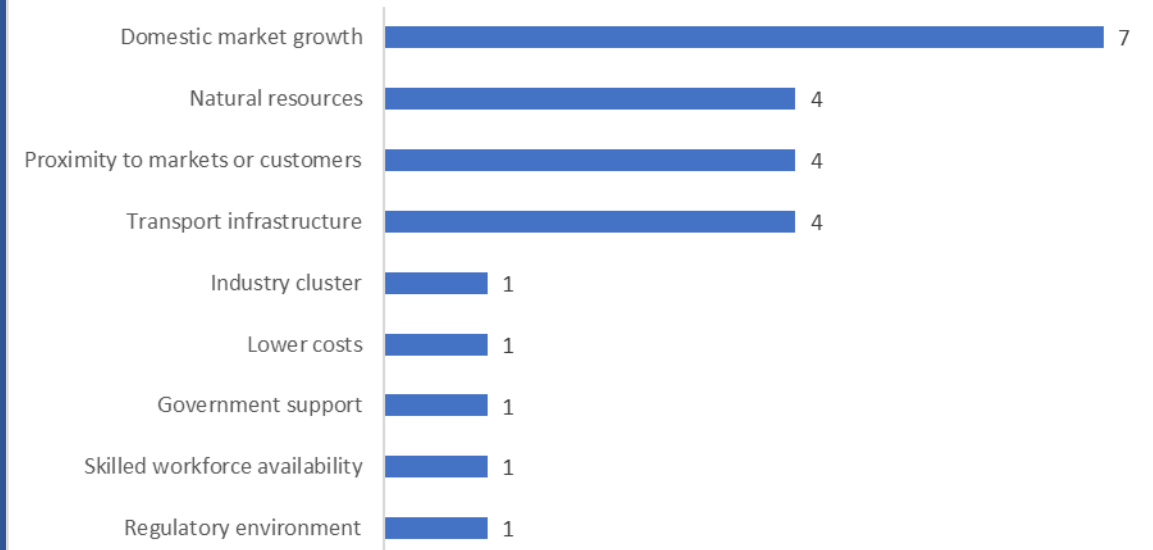
## Number of Projects, 2003 - 2018



## Top 10 Destination Countries in Europe, 2003 - 2018



## Motives & Determinants, Europe 2003 - 2018



## SUB-SECTOR: FURNITURE, HOMEWARE & RELATED PRODUCTS (WOOD PRODUCTS)

» 0,1% of all project globally, 2014 - 2018

**Sector:** wood products

» 1,1% of all projects globally, 2014 – 2018

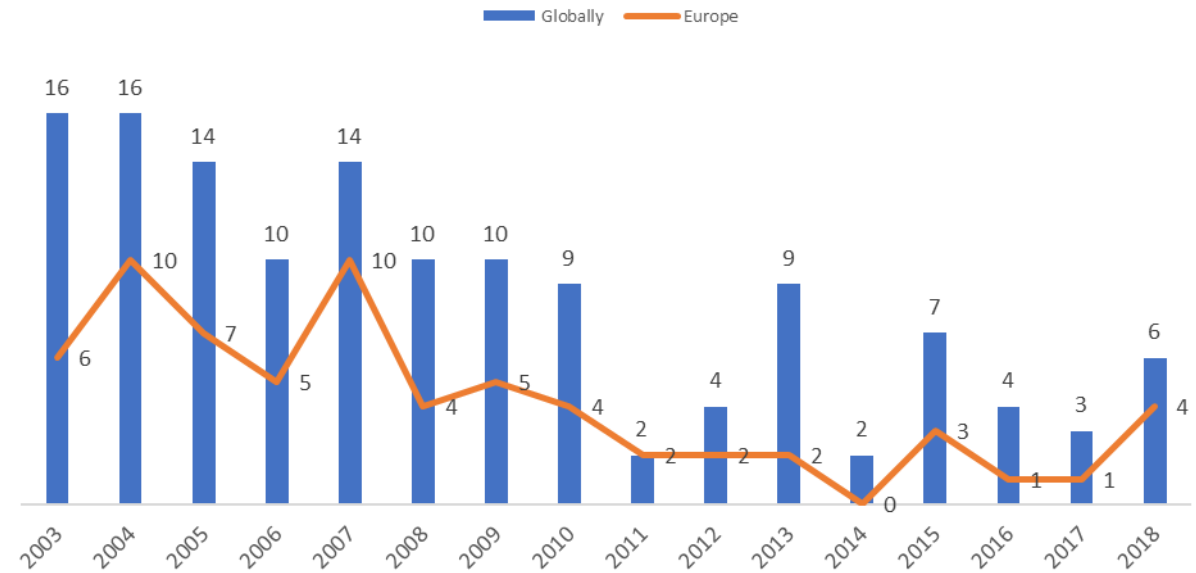
**Clusters:** consumer goods; transport equipment; wood, apparel & related products

**Number of projects in Lithuania:** 6 (2003 (2); 2005 (2); 2008; 2017)

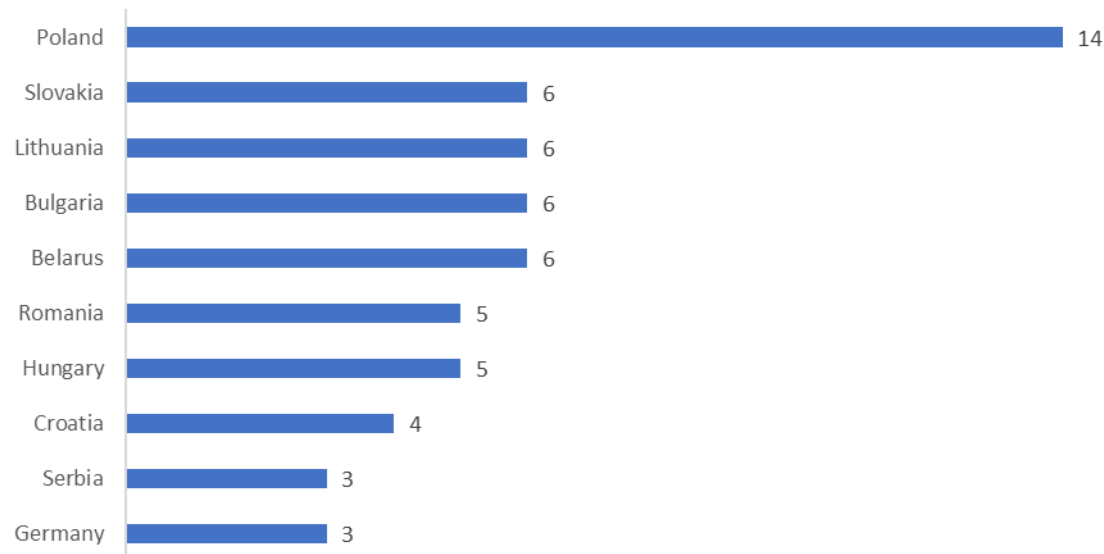
**Share of green-field projects:** 74%

**Percentage of investment projects in Europe (2014 – 2018):** 41%

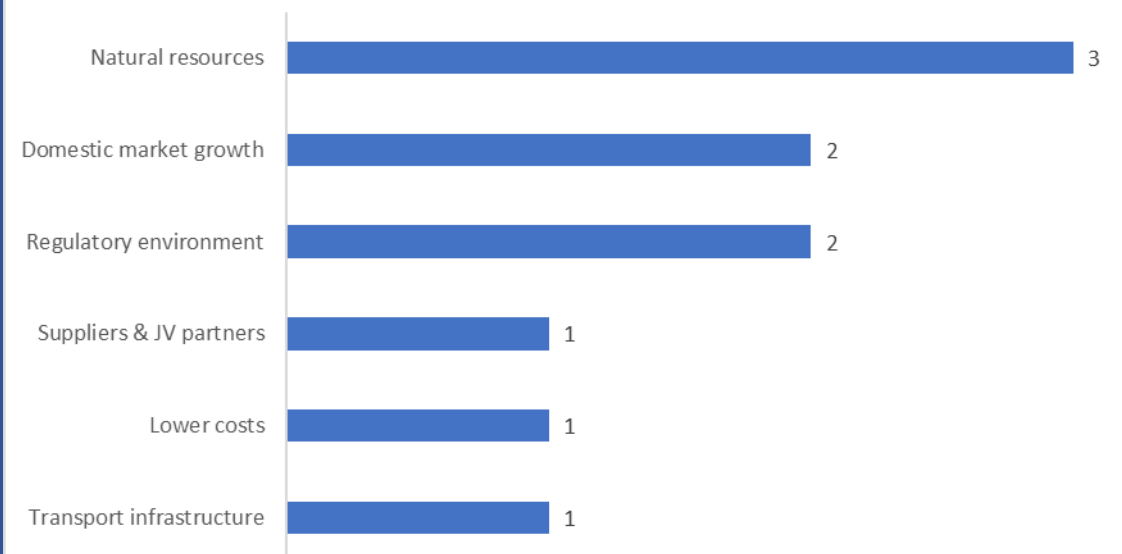
### Number of Projects, 2003 - 2018



### Top 10 Destination Countries in Europe, 2003 - 2018



### Motives & Determinants, Europe 2003 - 2018



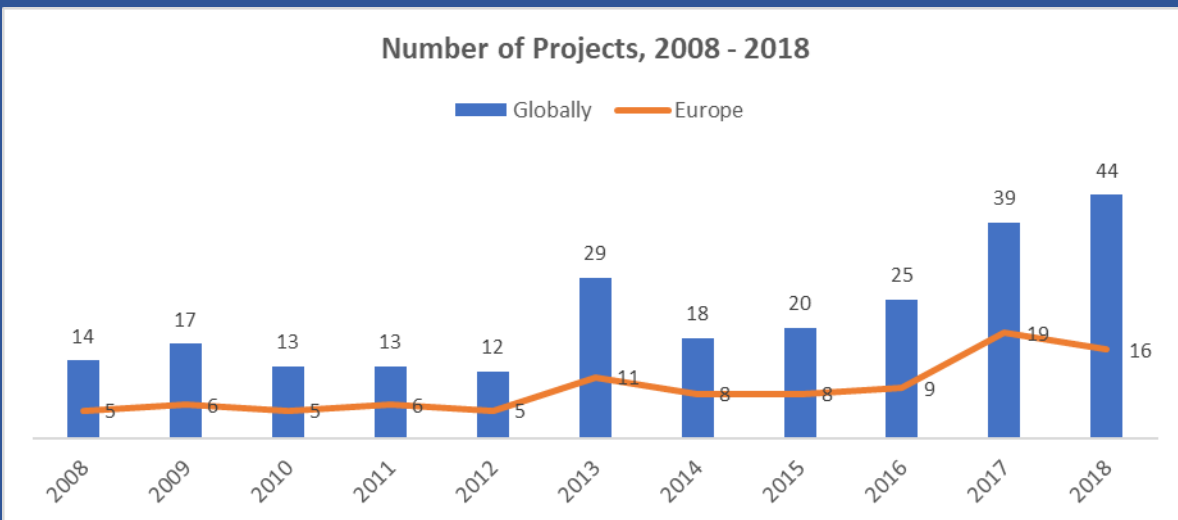
# BIOTECHNOLOGY

## In the last 10 years (2008 – 2018):

- Number of projects globally: 244
- Number of projects in Europe: 98
- 40% of all investment projects in this sector happened in Europe\*

## In the last 4 years (2014 – 2018):

- 1% of all investment projects happened in this sector



## Top10 destination\*\* countries globally

United States (65)  
 China (37)  
 United Kingdom (27)  
 Ireland (20)  
 India (16)  
 Belgium (15)  
 Germany (13)  
 Singapore (13)  
 France (9)  
 Malaysia (9)

## Top10 destination countries, Europe

United Kingdom (27)  
 Ireland (20)  
 Belgium (15)  
 Germany (13)  
 France (9)  
 Spain (9)  
 Switzerland (9)  
 Austria (8)  
 Netherlands (4)  
 Lithuania (4)

## Top10 investing\*\* countries globally

United States (112)  
 Switzerland (30)  
 Japan (27)  
 Germany (26)  
 United Kingdom (17)  
 Denmark (13)  
 France (13)  
 Australia (12)  
 India (9)  
 South Korea (8)

## Top10 investing countries, Europe

Switzerland (30)  
 Germany (26)  
 United Kingdom (17)  
 Denmark (13)  
 France (13)  
 Netherlands (7)  
 Belgium (4)  
 Italy (3)  
 Spain (3)  
 Finland (2)

\*In total, globally and in all sectors, between 2008 and 2018, 28% of all investment projects happened in Europe

\*\* Based on number of investment projects in the sector

## SUB-SECTOR: BIOLOGICAL PRODUCTST (EXCEPT DIAGNOSTIC)

» 0,8% of all project globally, 2014 - 2018

**Sector:** biotechnology

» 1% of all projects globally, 2014 – 2018

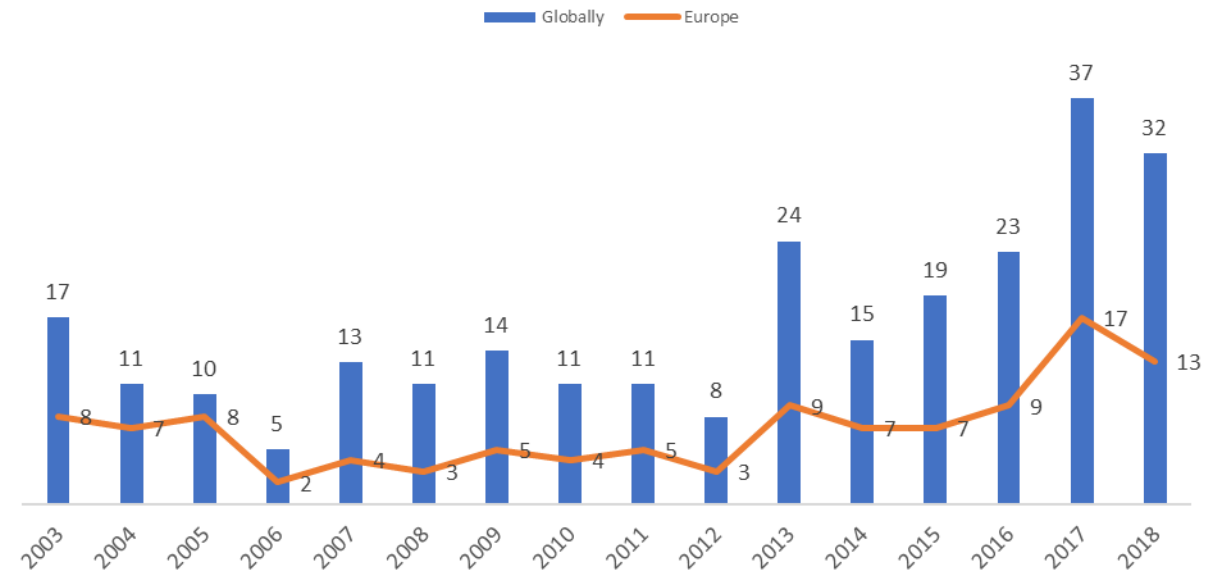
**Clusters:** agribusiness; ICT & electronics; industrial; life science; physical science; wood, apparel & related products

**Number of projects in Lithuania:** 4 (2004; 2008 (2); 2018)

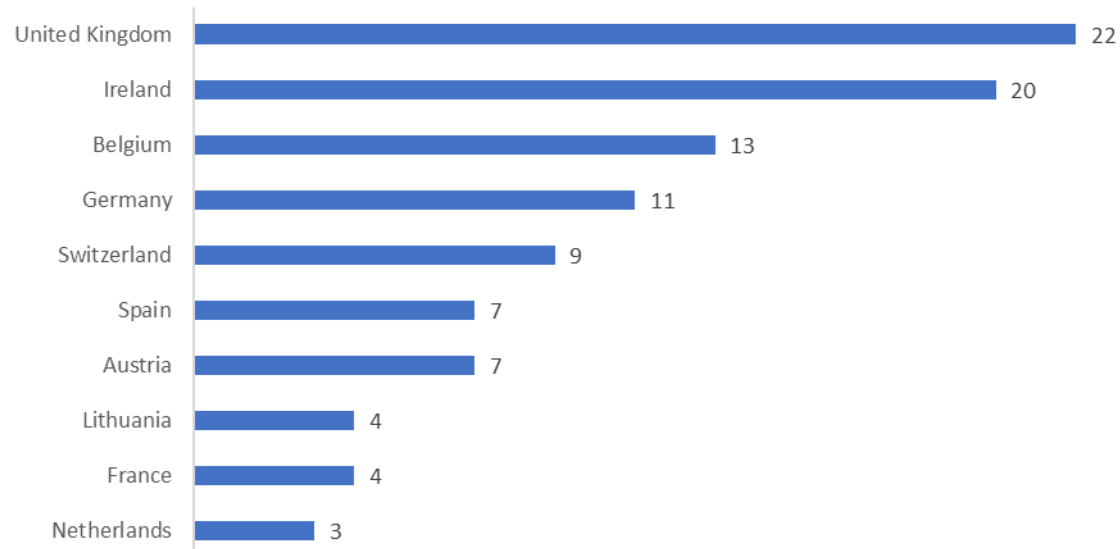
**Share of green-field projects:** 54%

**Percentage of investment projects in Europe (2014 – 2018):** 42%

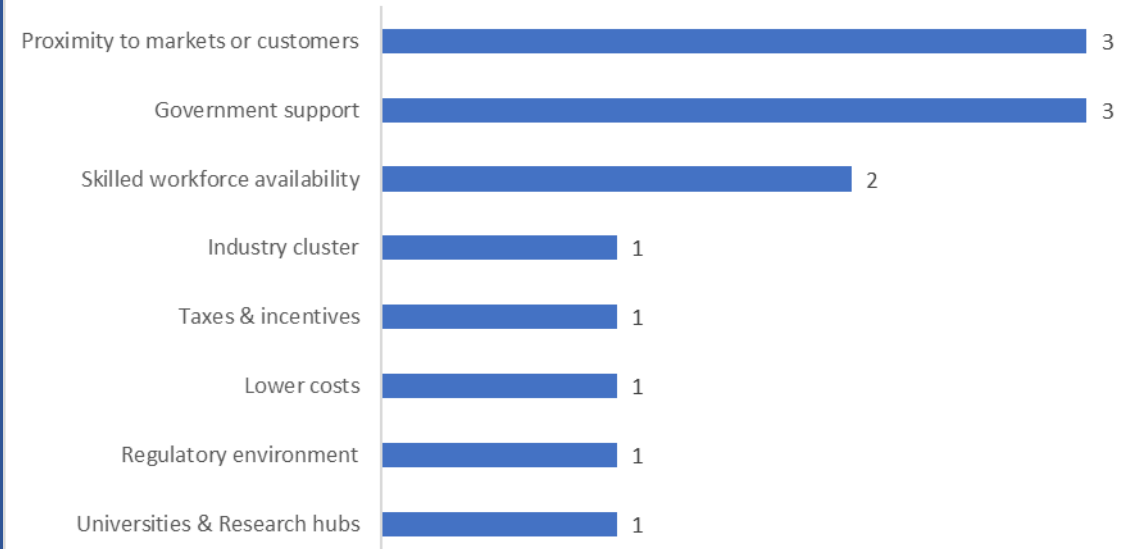
### Number of Projects, 2003 - 2018



### Top 10 Destination Countries in Europe, 2003 - 2018



### Motives & Determinants, Europe 2003 - 2018



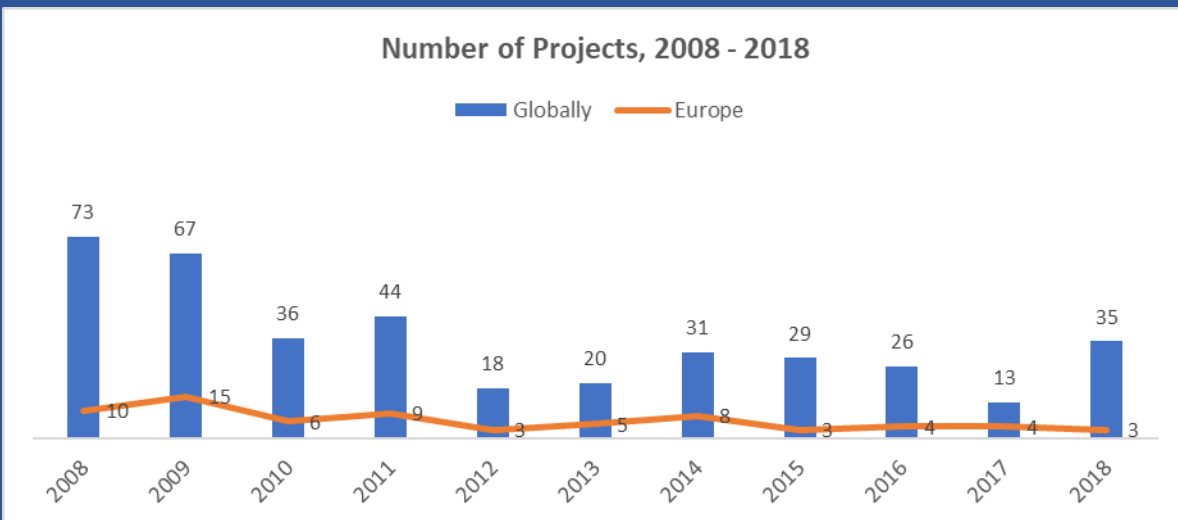
# COAL, OIL & GAS

## In the last 10 years (2008 – 2018):

- Number of projects globally: 392
- Number of projects in Europe: 70
- 18% of all investment projects in this sector happened in Europe\*

## In the last 4 years (2014 – 2018):

- 0,9% of all investment projects happened in this sector



## Top10 destination\*\* countries globally

China (53)  
 United States (36)  
 Indonesia (32)  
 Australia (28)  
 Russia (27)  
 Canada (19)  
 India (17)  
 Egypt (14)  
 Vietnam (14)  
 Pakistan (12)

## Top10 destination countries, Europe

United Kingdom (12)  
 Germany (11)  
 Spain (9)  
 Ukraine (9)  
 Bulgaria (8)  
 Italy (8)  
 Romania (8)  
 Bosnia-Herzegovina (7)  
 Serbia (7)  
 France (6)

## Top10 investing\*\* countries globally

United States (108)  
 United Kingdom (51)  
 Russia (46)  
 Netherlands (42)  
 Japan (36)  
 China (35)  
 France (35)  
 India (23)  
 Canada (21)  
 Germany (21)

## Top10 investing countries, Europe

United Kingdom (51)  
 Netherlands (42)  
 France (35)  
 Germany (21)  
 Spain (15)  
 Austria (10)  
 Italy (10)  
 Hungary (6)  
 Czech Republic (4)  
 Ukraine (4)

\*In total, globally and in all sectors, between 2008 and 2018, 28% of all investment projects happened in Europe

\*\* Based on number of investment projects in the sector

## SUB-SECTOR: PETROLEUM REFINERIES

» 0,3% of all project globally, 2014 - 2018

**Sector:** coal, oil & gas

» 0,9% of all projects globally, 2014 - 2018

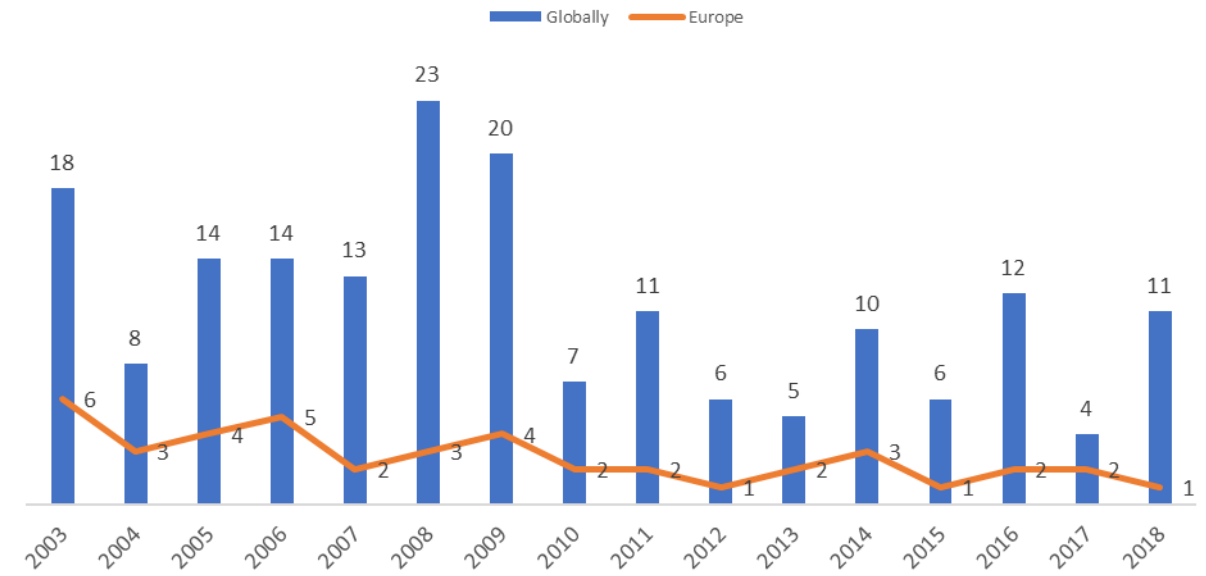
**Clusters:** energy; industrial

**Number of projects in Lithuania:** 1 (2018)

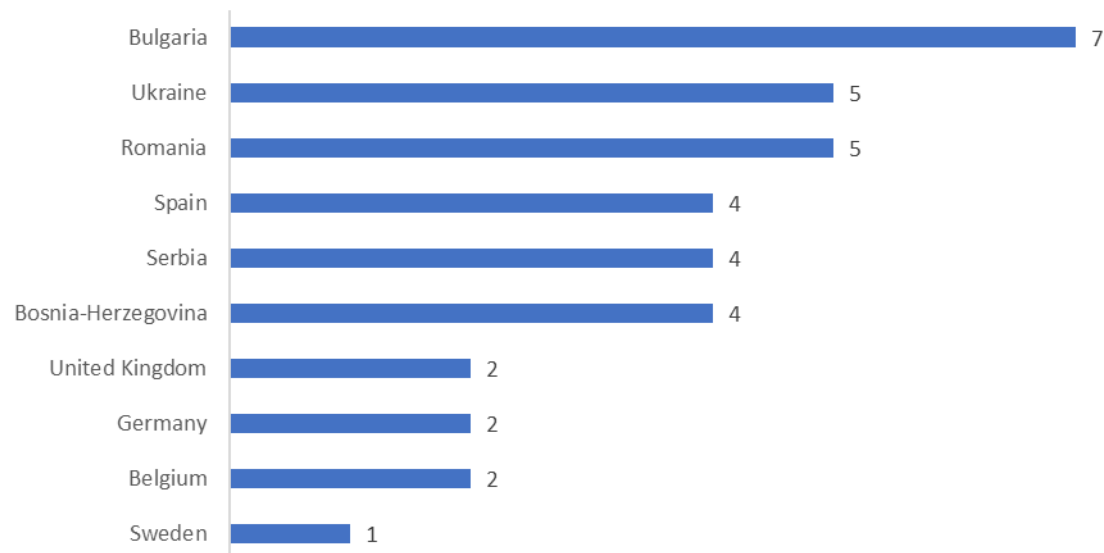
**Share of green-field projects:** 60%

**Percentage of investment projects in Europe (2014 – 2018):** 21%

### Number of Projects, 2003 - 2018



### Top 10 Destination Countries in Europe, 2003 - 2018



## Motives & Determinants, Europe 2003 – 2018

- Domestic market growth
- Proximity to markets or customers



## SUB-SECTOR: NATURAL, LIQUEFIED & COMPRESSED GASS

» 0,3% of all project globally, 2014 - 2018

**Sector:** coal, oil & gas

» 0,9% of all projects globally, 2014 - 2018

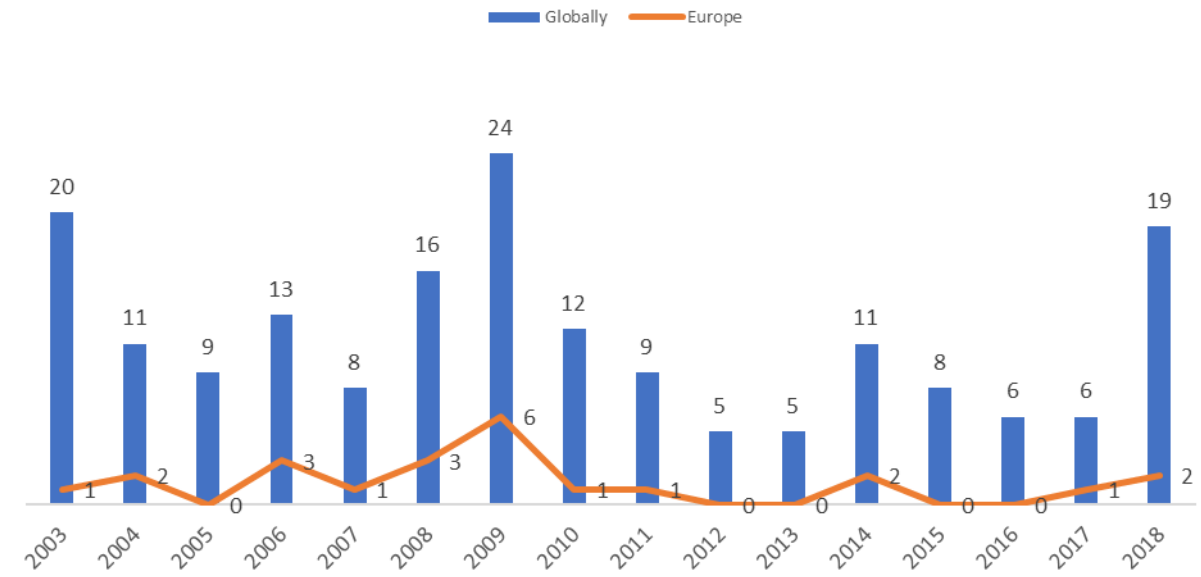
**Clusters:** energy; industrial

**Number of projects in Lithuania: 0**

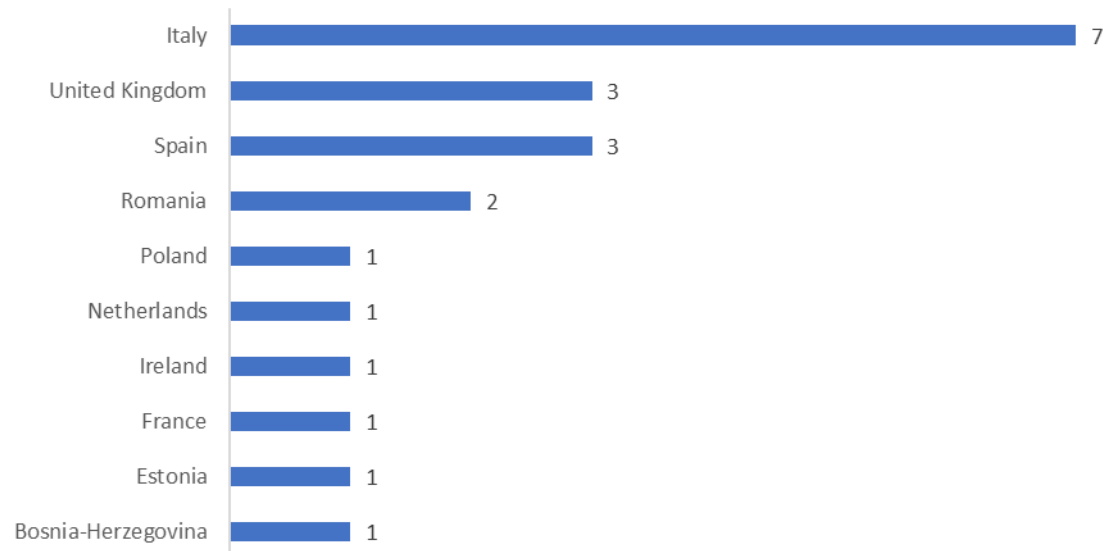
**Share of green-field projects: 78%**

**Percentage of investment projects in Europe (2014 – 2018): 10%**

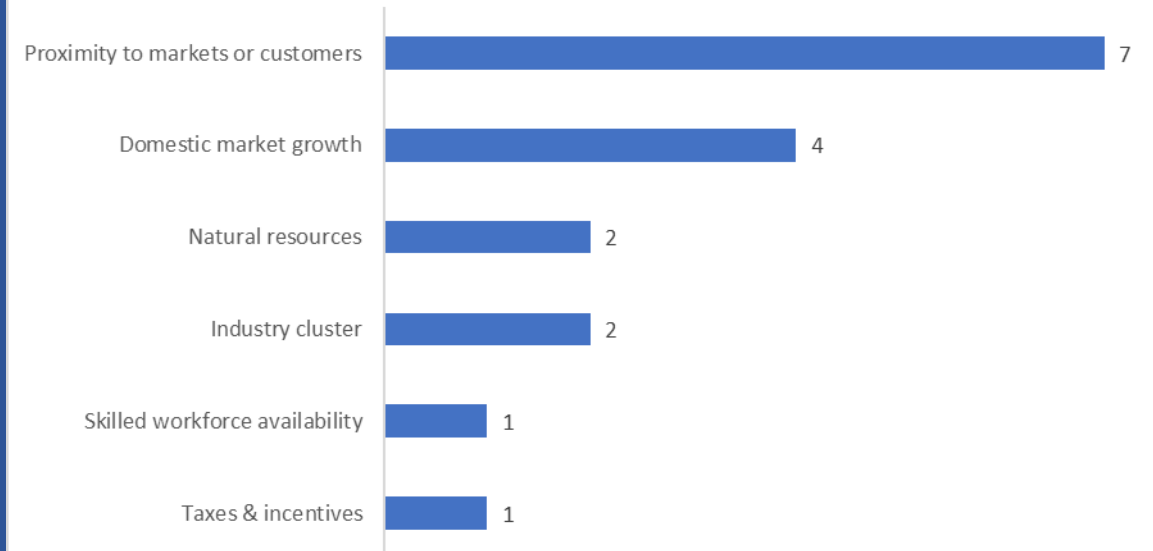
### Number of Projects, 2003 - 2018



### Top 10 Destination Countries in Europe, 2003 - 2018



### Motives & Determinants, Europe 2003 - 2018



## SUB-SECTOR: OTHER PETROLEUM & COAL PRODUCTS

» 0,2% of all project globally, 2014 - 2018

**Sector:** coal, oil & gas

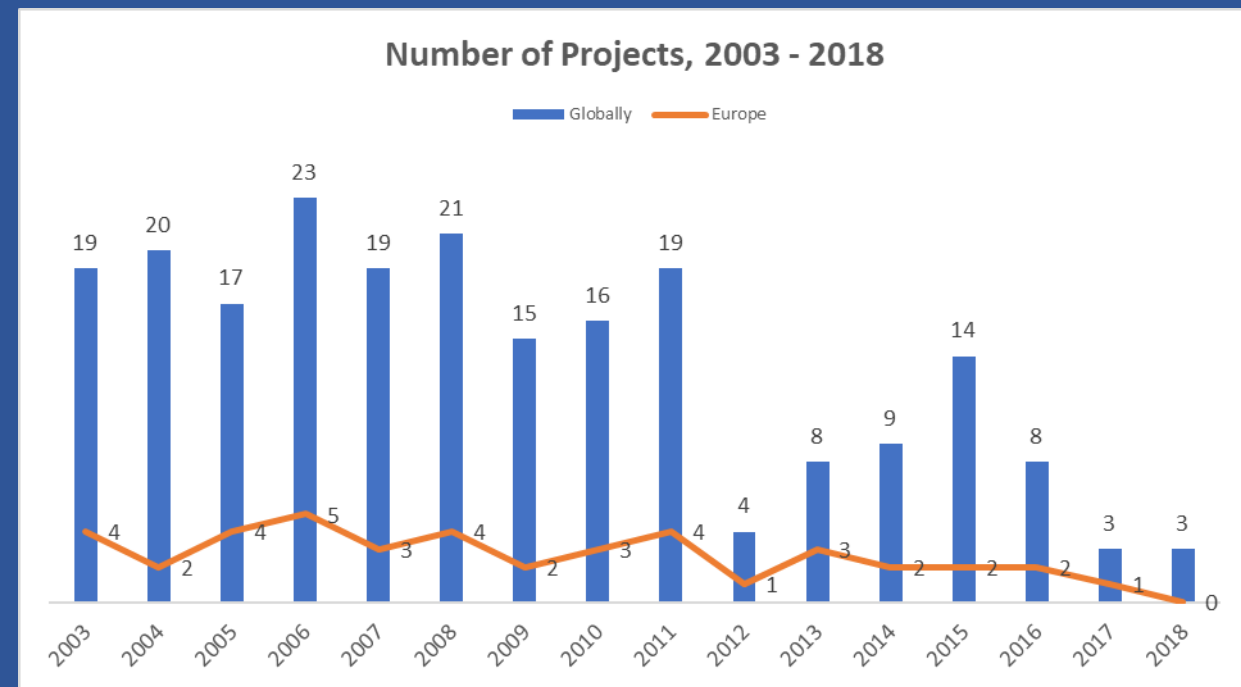
» 0,9% of all projects globally, 2014 - 2018

**Clusters:** construction; energy; industrial; physical science; transport equipment

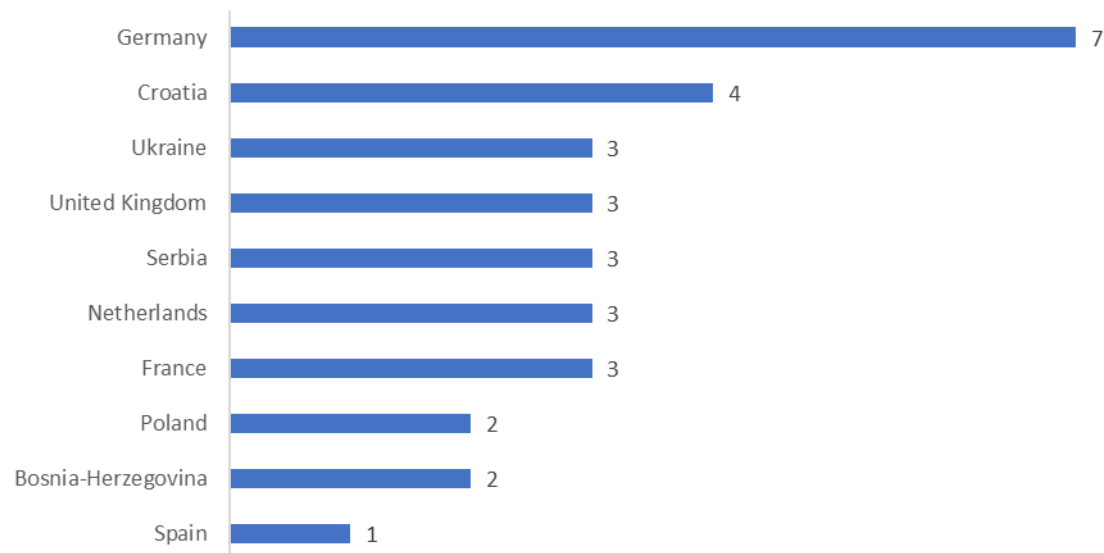
**Number of projects in Lithuania:** 0

**Share of green-field projects:** 77%

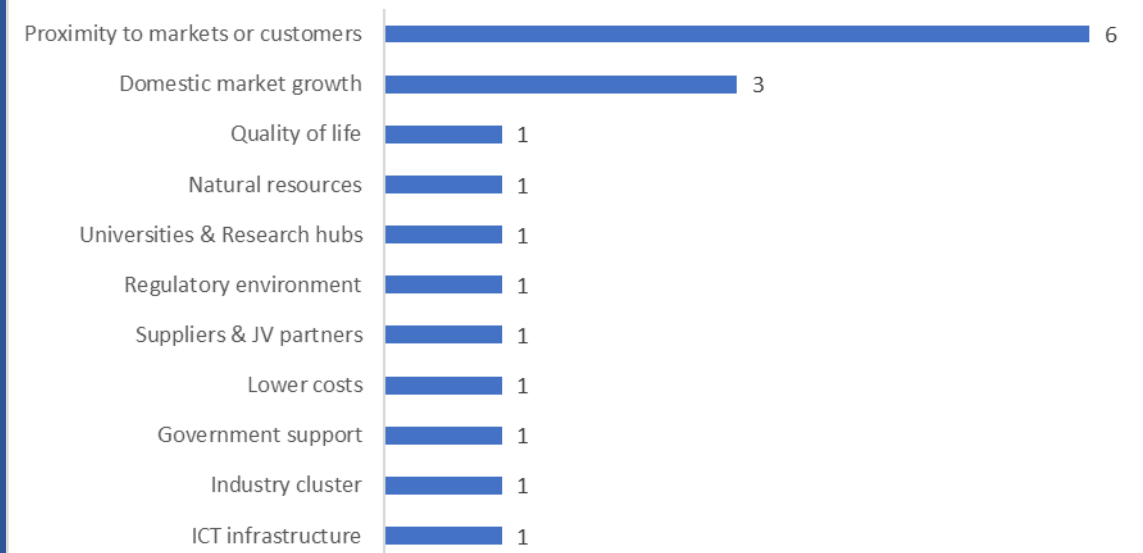
**Percentage of investment projects in Europe (2014 – 2018):** 19%



### Top 10 Destination Countries in Europe, 2003 - 2018



### Motives & Determinants, Europe 2003 - 2018



# SEMICONDUCTORS

## In the last 10 years (2008 – 2018):

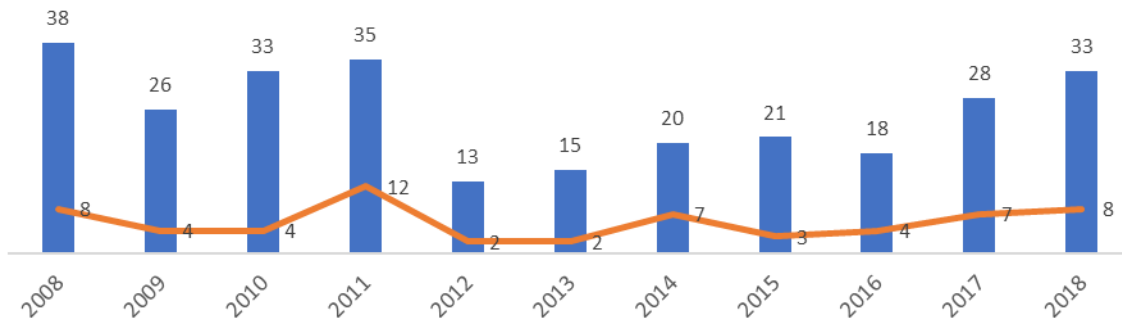
- Number of projects globally: 280
- Number of projects in Europe: 61
- 22% of all investment projects in this sector happened in Europe\*

## In the last 4 years (2014 – 2018):

- 0,8% of all investment projects happened in this sector

Number of Projects, 2008 - 2018

■ Globally ■ Europe



## Top10 destination\*\* countries globally

China (204)  
Singapore (41)  
Malaysia (32)  
United States (31)  
Taiwan (27)  
Germany (22)  
United Kingdom (20)  
Thailand (18)  
Philippines (15)  
India (14)

## Top10 destination countries, Europe

Germany (22)  
United Kingdom (20)  
Hungary (11)  
France (10)  
Austria (8)  
Ireland (8)  
Italy (8)  
Portugal (5)  
Bulgaria (3)  
Czech Republic (3)

## Top10 investing\*\* countries globally

United States (213)  
Japan (101)  
Taiwan (58)  
Germany (56)  
South Korea (43)  
Switzerland (24)  
Netherlands (10)  
Belgium (7)  
Singapore (7)  
Hong Kong (6)

## Top10 investing countries, Europe

Germany (56)  
Switzerland (24)  
Netherlands (10)  
Belgium (7)  
United Kingdom (6)  
Austria (5)  
France (5)  
Estonia (3)  
Finland (3)  
Italy (2)

\*In total, globally and in all sectors, between 2008 and 2018, 28% of all investment projects happened in Europe

\*\* Based on number of investment projects in the sector

## SUB-SECTOR: SEMICONDUCTORS & OTHER ELECTRONIC COMPONENTS

» 0,8% of all project globally, 2014 - 2018

**Sector:** semiconductors

» 0,8% of all projects globally, 2014 - 2018

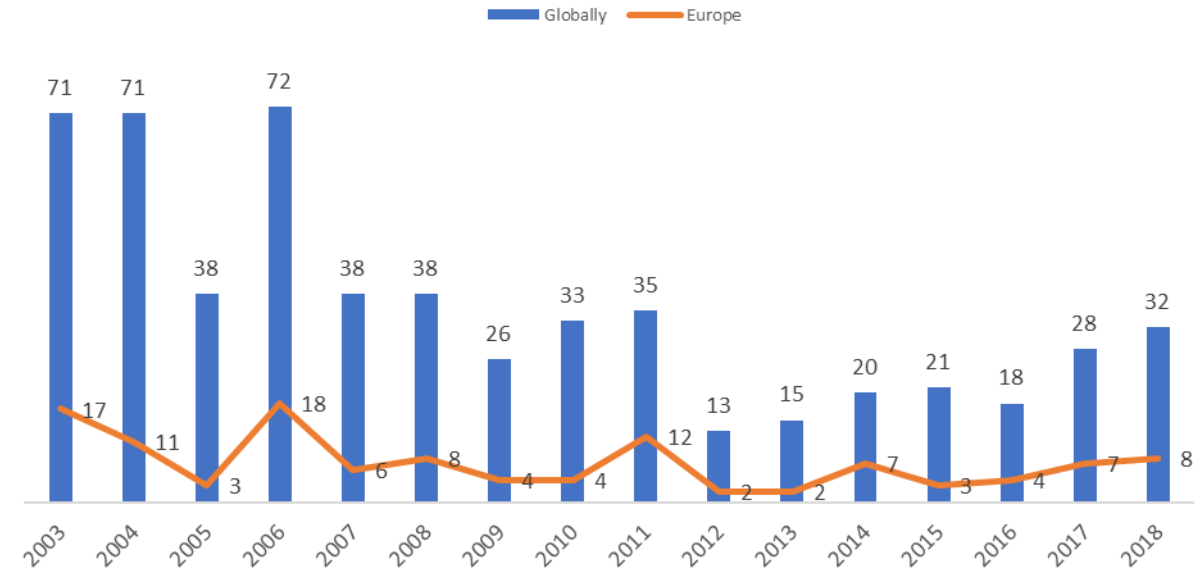
**Clusters:** environmental technology; ICT & electronics; industrial; transport equipment

**Number of projects in Lithuania:** 0

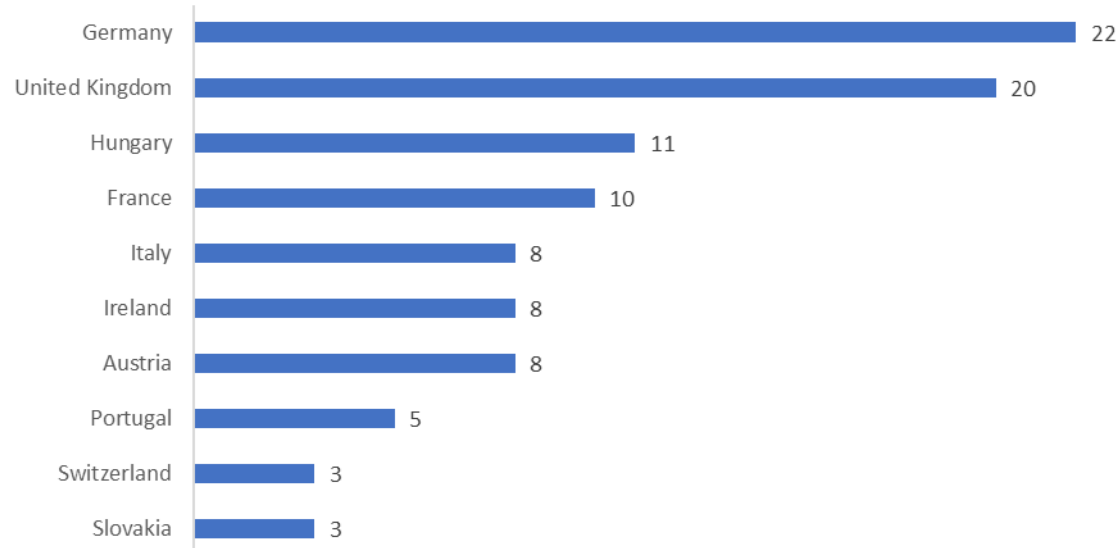
**Share of green-field projects:** 56%

**Percentage of investment projects in Europe (2014 – 2018):** 24%

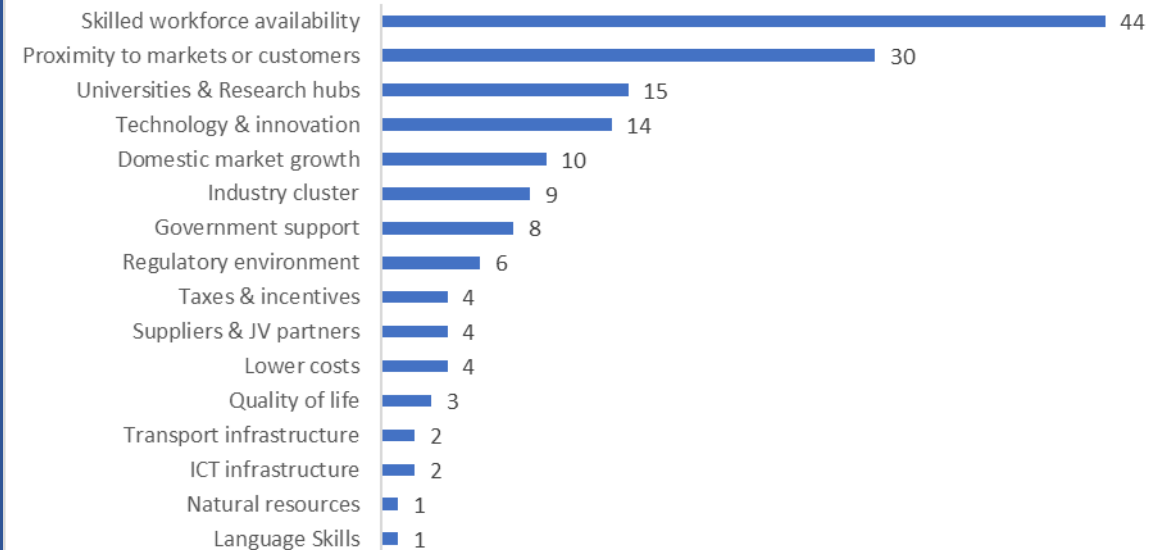
### Number of Projects, 2003 - 2018



### Top 10 Destination Countries in Europe, 2003 - 2018



### Motives & Determinants, Europe 2003 - 2018



# BUSINESS MACHINES & EQUIPMENT

## In the last 10 years (2008 – 2018):

- Number of projects globally: 219
- Number of projects in Europe: 35
- 16% of all investment projects in this sector happened in Europe\*

## In the last 4 years (2014 – 2018):

- 0,4% of all investment projects happened in this sector



## Top10 destination\*\* countries globally

China (104)  
 India (35)  
 Brazil (33)  
 Thailand (26)  
 Vietnam (24)  
 United States (22)  
 Malaysia (18)  
 Singapore (17)  
 Philippines (16)  
 Mexico (12)

## Top10 destination countries, Europe

Czech Republic (11)  
 United Kingdom (11)  
 Hungary (9)  
 France (6)  
 Poland (6)  
 Slovakia (5)  
 Spain (5)  
 Netherlands (4)  
 Romania (4)  
 Ireland (3)

## Top10 investing\*\* countries globally

Japan (130)  
 United States (112)  
 Taiwan (70)  
 China (18)  
 Hong Kong (18)  
 Singapore (14)  
 South Korea (12)  
 United Kingdom (11)  
 Italy (7)  
 Malaysia (5)

## Top10 investing countries, Europe

United Kingdom (11)  
 Italy (7)  
 Switzerland (5)  
 Belgium (4)  
 Netherlands (4)  
 Germany (3)  
 Portugal (3)  
 Denmark (2)  
 Lithuania (2)  
 Sweden (2)

\*In total, globally and in all sectors, between 2008 and 2018, 28% of all investment projects happened in Europe

\*\* Based on number of investment projects in the sector

## SUB-SECTOR: COMPUTER & PERIPHERAL EQUIPMENT

» 0,4% of all project globally, 2014 - 2018

**Sector:** business machines & equipment

» 0,4% of all projects globally, 2014 - 2018

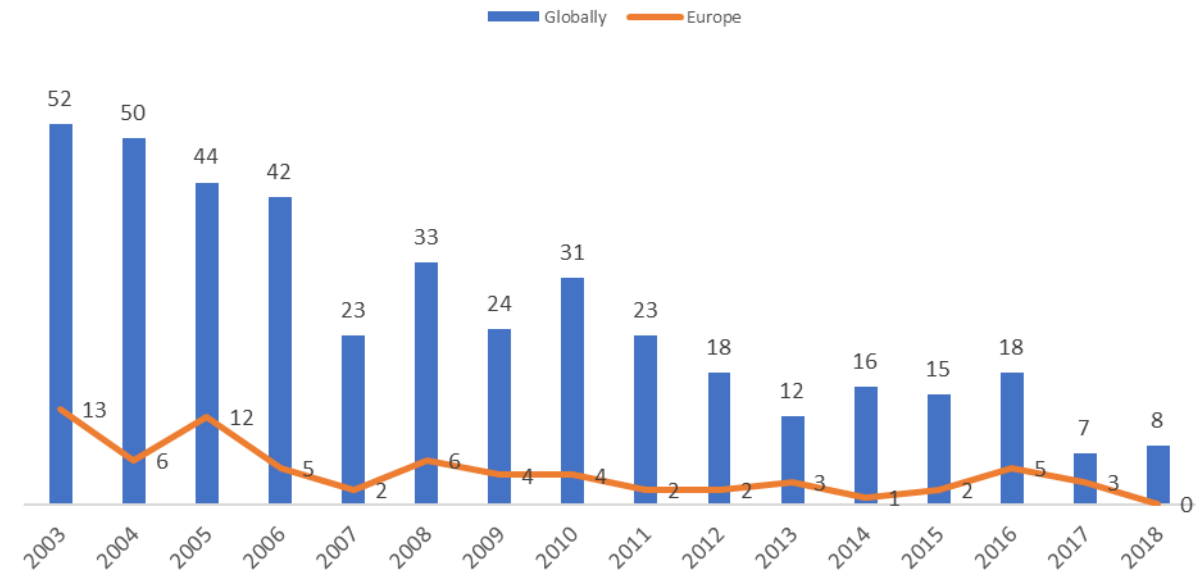
**Clusters:** creative industries; financial services; ICT & electronics; life science; retails trade; transport equipment

**Number of projects in Lithuania: 0**

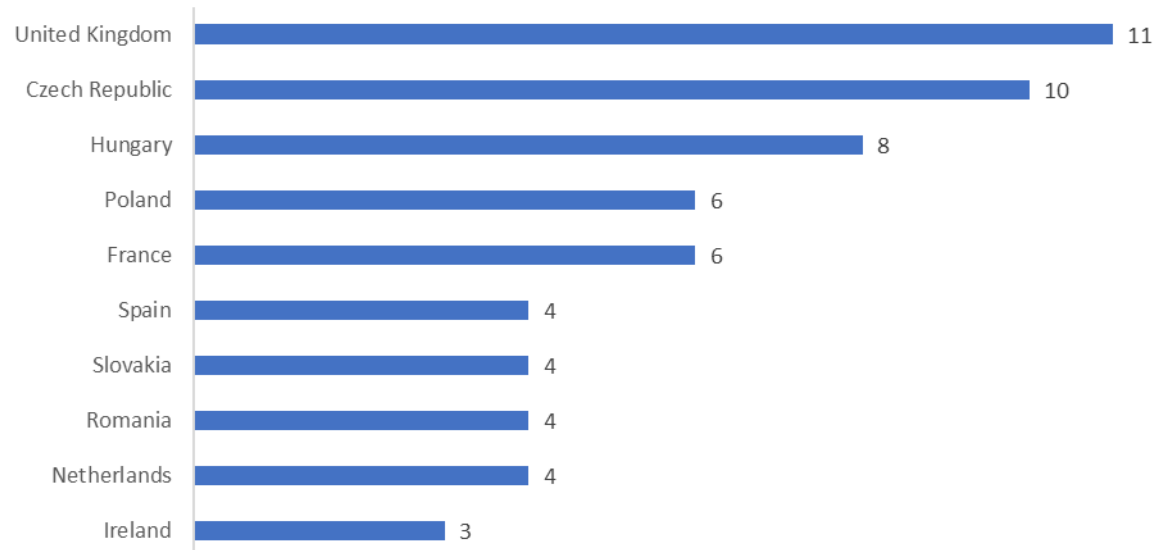
**Share of green-field projects: 65%**

**Percentage of investment projects in Europe (2014 – 2018): 17%**

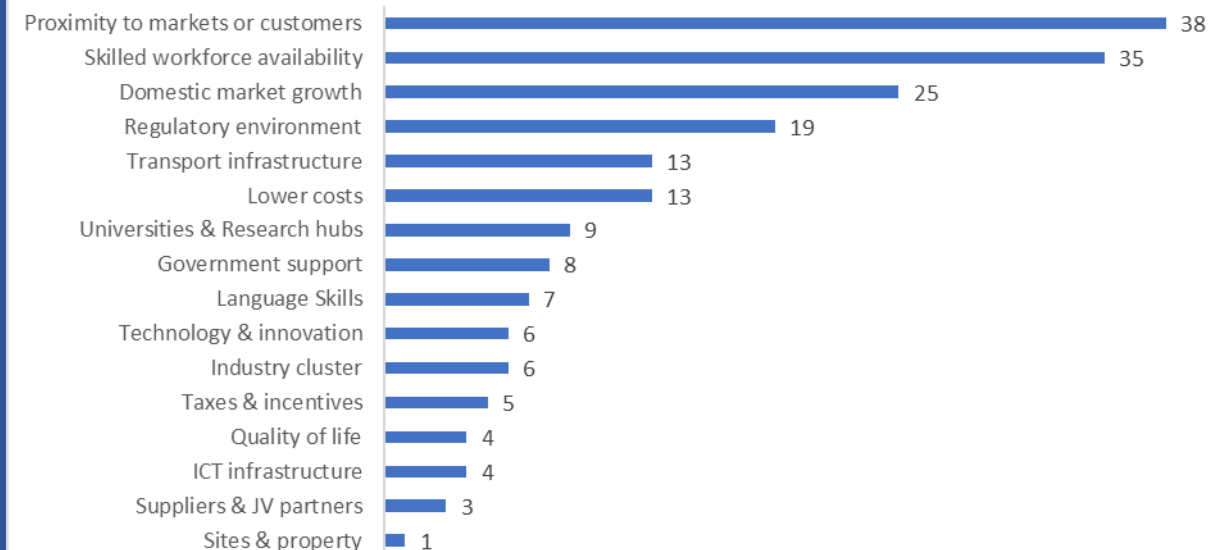
### Number of Projects, 2003 - 2018



### Top 10 Destination Countries in Europe, 2003 - 2018



### Motives & Determinants, Europe 2003 - 2018



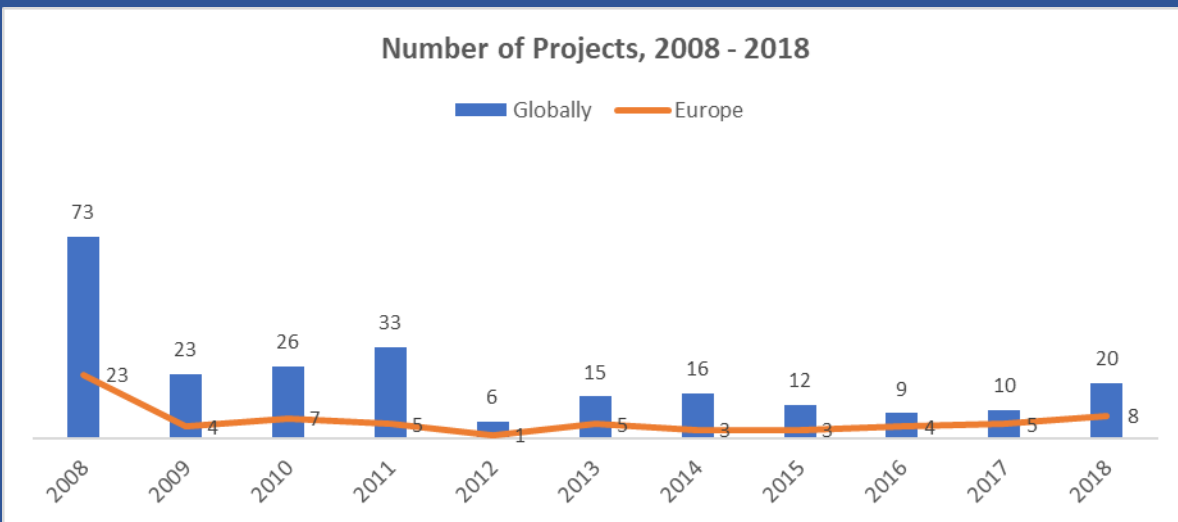
# RENEWABLE ENERGY

## In the last 10 years (2008 – 2018):

- Number of projects globally: 243
- Number of projects in Europe: 68
- 30% of all investment projects in this sector happened in Europe\*

## In the last 4 years (2014 – 2018):

- 0,4% of all investment projects happened in this sector



## Top10 destination\*\* countries globally

United States (43)  
 Brazil (24)  
 Philippines (24)  
 China (19)  
 Indonesia (19)  
 Germany (14)  
 India (14)  
 Spain (14)  
 United Kingdom (14)  
 France (13)

## Top10 destination countries, Europe

Germany (14)  
 Spain (14)  
 United Kingdom (14)  
 France (13)  
 Netherlands (11)  
 Hungary (10)  
 Belgium (8)  
 Romania (7)  
 Bulgaria (6)  
 Bosnia-Herzegovina (5)

## Top10 investing\*\* countries globally

United States (86)  
 Germany (37)  
 United Kingdom (34)  
 Spain (33)  
 Japan (17)  
 Australia (15)  
 France (14)  
 Austria (12)  
 Finland (12)  
 China (11)

## Top10 investing countries, Europe

Germany (37)  
 United Kingdom (34)  
 Spain (33)  
 France (14)  
 Austria (12)  
 Finland (12)  
 Netherlands (11)  
 Italy (10)  
 Sweden (9)  
 Switzerland (9)

\*In total, globally and in all sectors, between 2008 and 2018, 28% of all investment projects happened in Europe

\*\* Based on number of investment projects in the sector

## SUB-SECTOR: BIOMASS POWER

» 0,4% of all project globally, 2014 - 2018

**Sector:** renewable energy

» 0,4% of all projects globally, 2014 – 2018

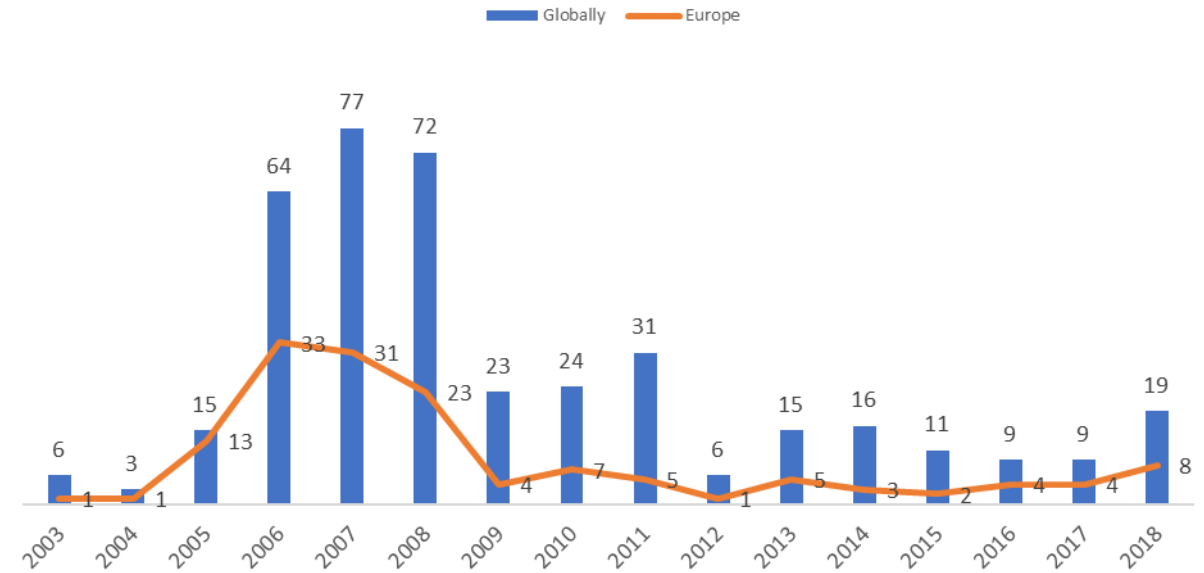
**Clusters:** energy; environmental technology

**Number of projects in Lithuania:** 2 (2006)

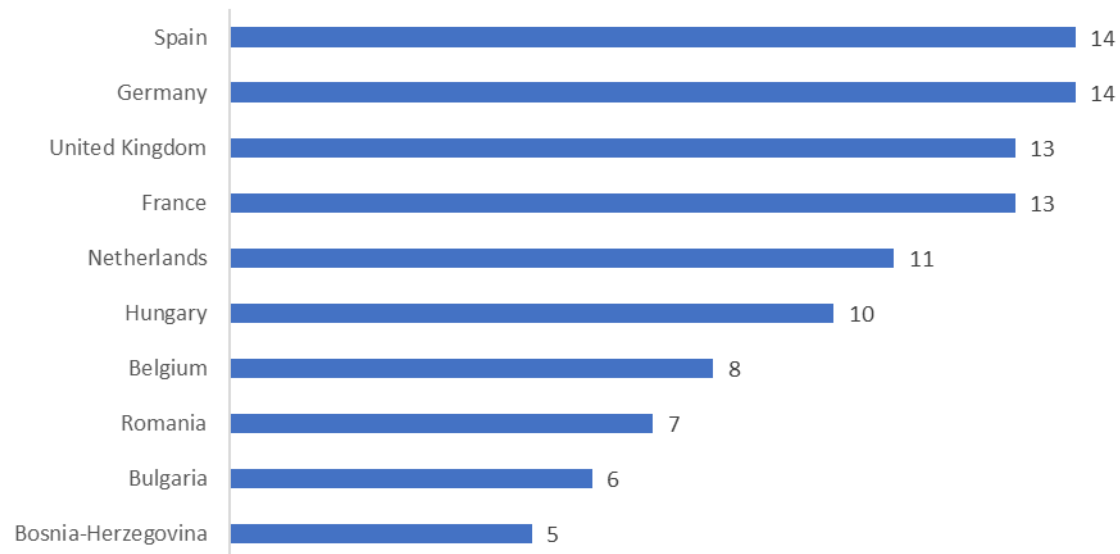
**Share of green-field projects:** 91%

**Percentage of investment projects in Europe (2014 – 2018):** 33%

### Number of Projects, 2003 - 2018



### Top 10 Destination Countries in Europe, 2003 - 2018



### Motives & Determinants, Europe 2003 - 2018

