



# 100%

## FACTS & FIGURES

About doing business  
in the Gothenburg  
region 2023/2024



BUSINESS REGION  
GÖTEBORG



# Gothenburg – amid a historic leap in development

For a decade now, Gothenburg has been the region in Sweden with the strongest growth in jobs, economy and exports. We have world-leading innovation and research, successful collaboration and openness – which have led us into the biggest leap forward in modern times.

So how did we become an engine of growth and innovation? In Sweden, the Gothenburg region is where companies spend the most money on research and development. We have the most test beds – for example, the Gothenburg Green City Zone is the world's first large-scale test bed for emission-free transportation in an urban environment. That commitment has transformed Gothenburg from a heavy industrial city into an economic engine and strong knowledge hub. It was that competence, the logistics location and the strong innovation potential, that made Northvolt and Volvo Cars choose to establish their new production site for batteries here. In the Gothenburg factory, battery cells for half a million cars will be produced each year, 50 GWh. Our automotive cluster is a world leader in electrification, safety and autonomous engineering technology. The Port of Gothenburg is not only Scandinavia's most important port, but also a market leader in the transition to fossil-free logistics.

The open business culture in Gothenburg contributes to the positive development. Large and small research-intensive companies drive innovation forward together with the public sector and academia. It has given us a culture where collaboration, between all agents, has led to both increased growth and strengthened innovation potential. In our clusters, the collaboration has contributed to Gothenburg becoming a leader in various industries such as automotive and sustainable mobility, hard tech, life science, logistics, ICT and urban development. On the following pages you will find a comprehensive compilation of official facts and statistics, which can help you identify opportunities and will help you to get involved in Sweden's capital of growth and innovation.

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## BUSINESS REGION GÖTEBORG

is responsible for business development in the City of Gothenburg and represents thirteen municipalities in the region.





# Contents

- 
- 1. AN ATTRACTIVE REGION** **Page 5-11**  
Gothenburg's labour market.  
International and national competitiveness.

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  - 2. RICH EXCHANGE WITH THE WORLD** **Page 12-16**  
Import and export. Foreign-owned companies.  
International visitors.

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  - 3. GROWTH AND LABOUR MARKET** **Page 17-21**  
Emerging industries. Largest employment growth.  
Employment rate.

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  - 4. BUSINESS** **Page 22-27**  
Largest employers. Prominent clusters.  
Newly started companies.

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  - 5. POPULATION, LIFESTYLE AND EDUCATION** **Page 28-30**  
Demographics. Level of education. Seats of learning.

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  - 6. COSTS AND TAXES** **Page 31-34**  
Salary and rent levels. Tax regulations.  
Nordic cost comparison.

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  - 7. CLIMATE, ENVIRONMENT AND SUSTAINABLE DEVELOPMENT** **Page 35-38**  
Green transition, supplied energy, green bonds.

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# 1.

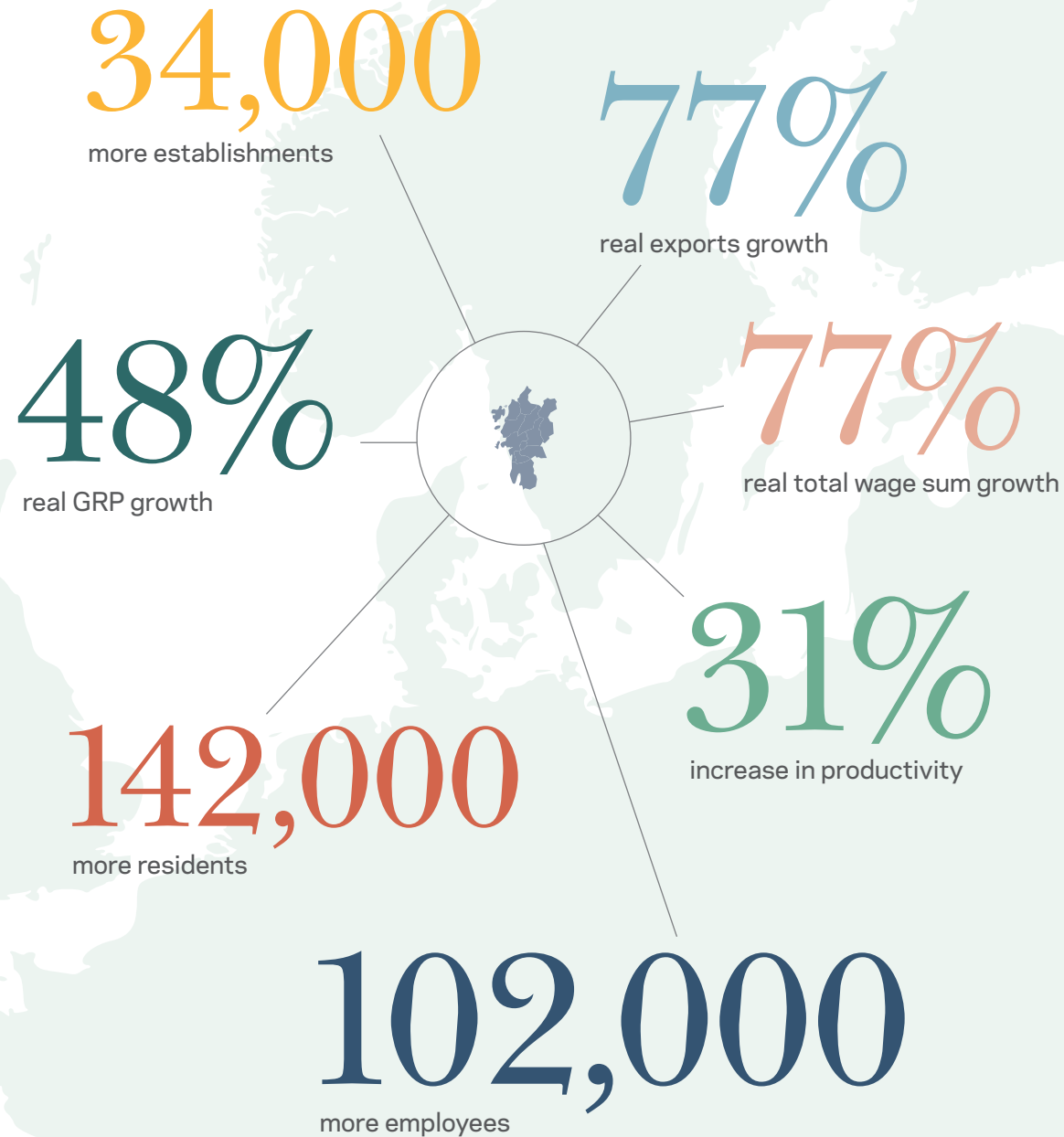


## An attractive region

The Gothenburg region's strength in innovation and sustainable development is making the region develop and grow. This positive change is shown in national and international comparisons.

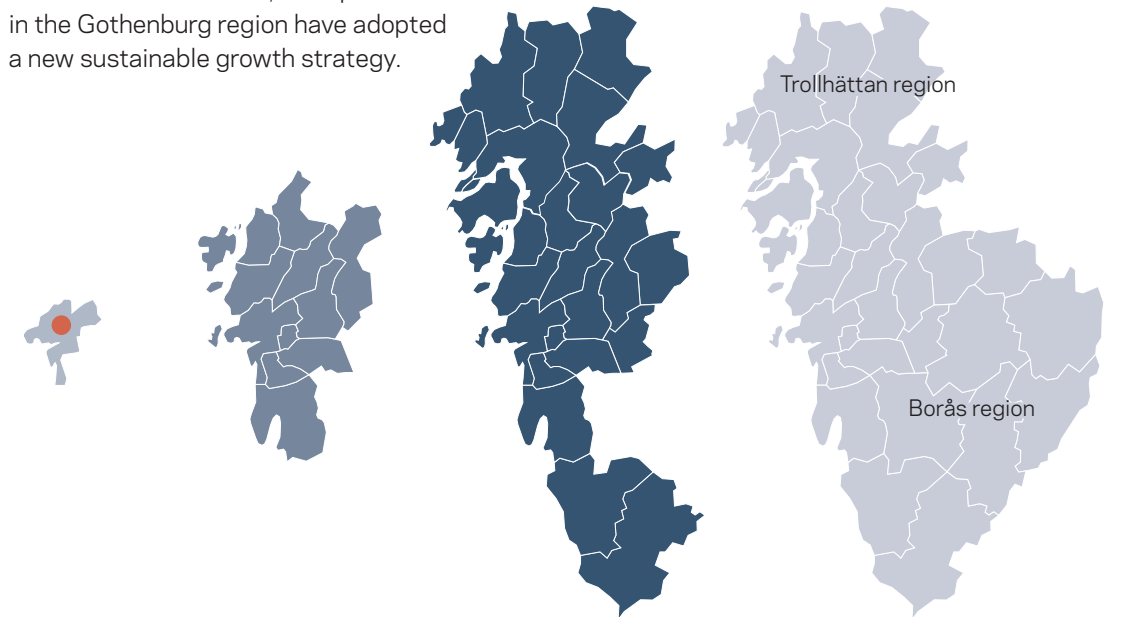
! Unless otherwise specified, the statistics in this and the chapters to come refer to the 13 member municipalities in the Gothenburg region's municipal association: Ale, Alingsås, Gothenburg, Härryda, Kungälv, Lerum, Lilla Edet, Mölndal, Partille, Stenungsund, Tjörn and Öckerö.

## Growth in the Gothenburg region since the year 2010



## Growth strategy - to strengthen central Gothenburg and expand the labour market

The Gothenburg region is growing more rapidly than anyone could have predicted. In addition, major investments are being made in infrastructure and urban development, which in turn have increased commuters and new inhabitants rapidly. By 2030, it is likely that also Borås will be a part of Gothenburg's labour market. For this reason, local politicians in the Gothenburg region have adopted a new sustainable growth strategy.



<b>Central Gothenburg</b> <b>+45,000</b> residents 2012-2030	<b>Gothenburg region</b> <b>+10,000</b> residents per year	<b>Gothenburg's labour market today</b> <b>1.4</b> million residents	<b>Gothenburg's labour market 2030</b> <b>1.8</b> million residents
<b>+60,000</b> jobs 2012-2030	<b>+120,000</b> jobs 2016-2035		

A local labour market is a division of Sweden based on commuting patterns. When commuting between municipalities reaches the extent that these municipalities can be seen to be dependent on one another, they form a labour market region.



**THE FOLLOWING 27 MUNICIPALITIES ARE INCLUDED IN GOTHENBURG'S LABOUR MARKET TODAY:** Ale, Alingsås, Bollebygd, Falkenberg, Färgelanda, Grästorp, Gothenburg, Härryda, Kungälv, Lerum, Lilla Edet, Lysekil, Mellerud, Munkedal, Mölndal, Orust, Partille, Sotenäs, Stenungsund, Tjörn, Trollhättan, Uddevalla, Varberg, Vårgårda, Vänersborg and Öckerö.

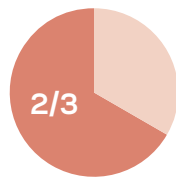
# The Gothenburg region - a leading research region which is highly competitive on the international stage

GLOBAL RANKING: R&D AS A SHARE OF GDP

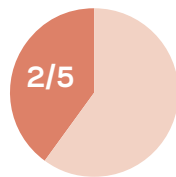
1, 2, 3 ... **4** ... 195, 196

# Sweden

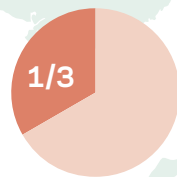
OUR LEADING INDUSTRIES ACCOUNT FOR THE FOLLOWING SHARES OF SWEDEN'S TOTAL PRIVATE R&D EXPENDITURE IN EACH SECTOR RESPECTIVELY:



AUTOMOTIVE



CHEMICALS, HYGIENE PRODUCTS AND PHARMACEUTICALS



KNOWLEDGE-INTENSIVE BUSINESS SERVICES

# 34%

of Sweden's total R&D expenditure within the private sector are invested in the Gothenburg region

Source: Statistics Sweden



Photo: Bergt Kjellin / BRG

## SWEDEN'S LEADING REGION FOR BUSINESS R&D

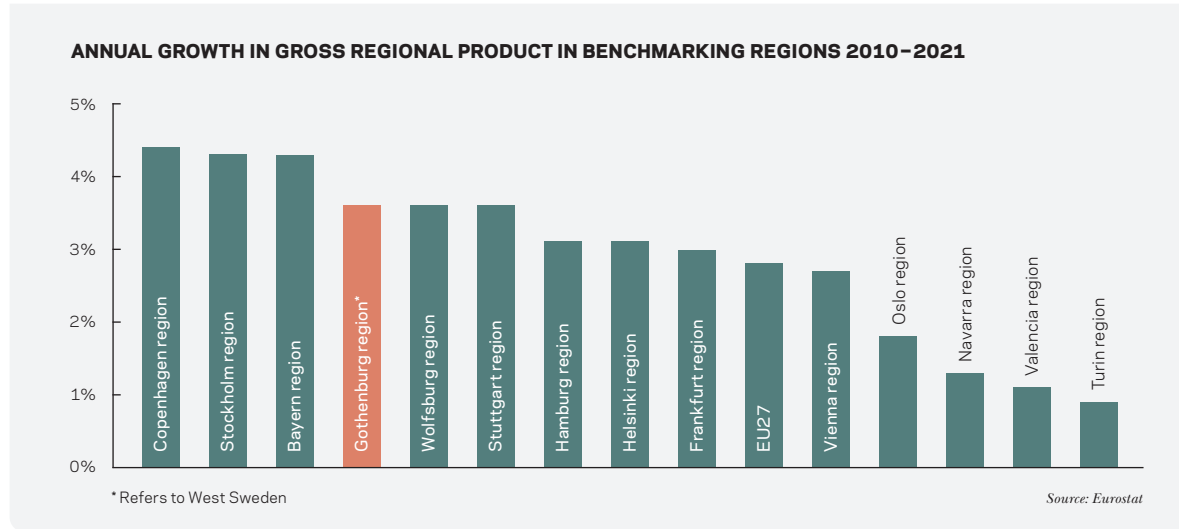
Businesses in the Gothenburg region invest more in R&D (approximately SEK 45 billion) than anywhere else in Sweden, including the Stockholm region where R&D investment was at approximately SEK 44 billion. This confirms the strength the region's companies possess - to produce leading innovations that are globally exported. Firms choose to invest in long-term R&D in the region as there is access to relevant expertise, a growing market, various testbed environments with triple helix collaborations as well as strong clusters.

- SWEDEN RANKED 3rd**  
most innovative country in the world.  
*Source: WIPO, 2022*
- SWEDEN RANKED 3rd**  
best country in the world for sustainable development.  
*Source: UN SDG index, 2022*
- Innovations\***  
REGIONAL INNOVATION SCOREBOARD 2021  
INNOVATION LEADER AMONG 251 REGIONS  
Assesses the innovation performance of European regions. West Sweden is ranked as a European innovation leader. Among other things, the region achieves distinctions for:
  - Process and product innovations within SME (Small and Medium Enterprises)
  - Increased employment within knowledge-based professions
  - Export of high-technology goods
  - Highly educated population*Source: European Commission*
- Economic potential**  
EUROPEAN CITIES AND REGIONS OF THE FUTURE  
10TH PLACE  
Among Europe's large cities, Gothenburg ranks tenth in the category 'Economic potential'.  
*Source: fDi Intelligence, 2023*
- SWEDEN RANKED 3rd**  
most digital competitive country in the world.  
*Source: IMD, 2022*
- Competitiveness\***  
REGIONAL COMPETITIVENESS INDEX 2022  
29 OF 234 REGIONS  
Assesses how close EU regions are to their target strategies for achieving improved competitiveness. The Gothenburg region has achieved all of its established EU targets and is praised for, among other things:
  - Higher education and life-long learning
  - Technological readiness and innovation potential
  - Institutions*Source: European Commission*

\* Refers to West Sweden

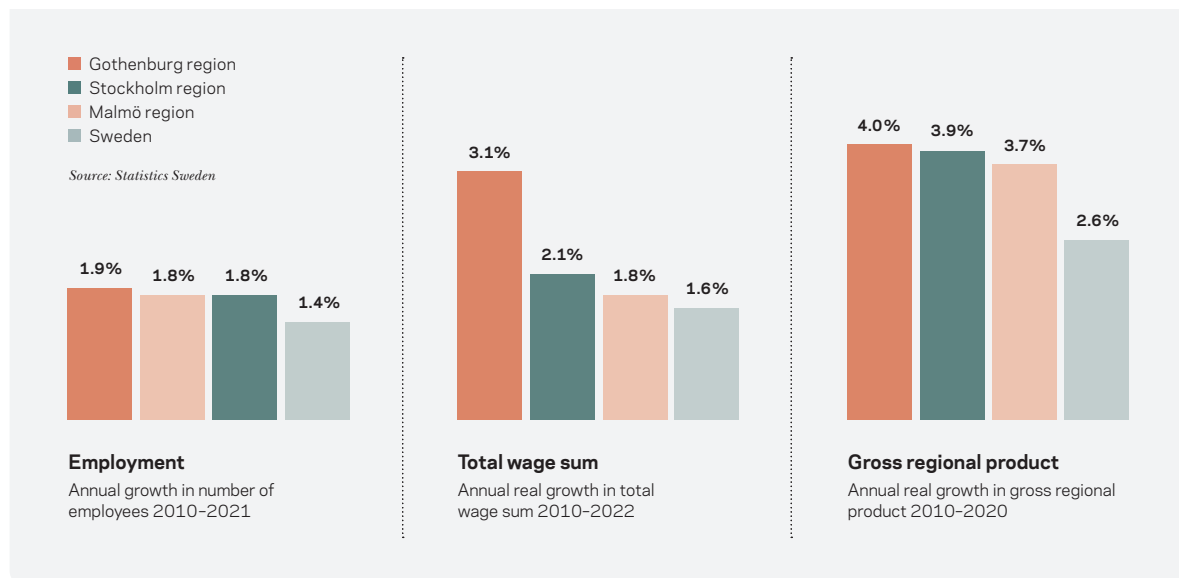
# A strong growth engine

Nordic regions show strong economic growth among selected benchmark regions in Europe. Top of the list is the Copenhagen region followed by the Stockholm region, with an annual growth rate of just above 4.3 per cent. In the Gothenburg region (which in this context refers to West Sweden), the annual economic growth rate over the period was 3.6 per cent.



# Growth in Swedish metropolitan regions

The metropolitan regions drive growth in Sweden. Among the metropolitan regions, the Gothenburg region exhibits the strongest growth in employment and in gross regional product. Also when it comes to growth in the total wage sum, the Gothenburg region has stronger growth pace compared to the other metropolitan regions.



# Sweden's best logistics location

That Scandinavia's largest port is located here is just one of the reasons the Gothenburg region is such a prominent logistics hub. Some of the reasons why the Gothenburg region is Sweden's best logistics location are:

- Direct ocean freight services to 130 destinations and an effective rail freight system to other parts of Sweden and Norway
  - Short distances between the import dock to warehouses result in low logistics costs
  - Access to leading competence within logistics
  - New large logistics facilities
  - New large land assets for logistics near Port of Gothenburg, Hisingen, and in Härryda at Gothenburg Landvetter Airport
  - Advanced and rapidly growing transportation infrastructure with an environmental focus
  - National centre for R&D within sustainable logistics solutions and transportation
- Source: Intelligent Logistik



## SWEDEN'S TOP 10 LOGISTICS REGIONS 2023

RANKING*	REGION
1 (2)	Gothenburg region
2 (1)	Helsingborg region
3 (3)	Jönköping region
4 (4)	Eskilstuna region
5 (6)	Stockholm North
5 (4)	Norrköping region
7 (7)	Örebro region
8 (8)	Malmö region
9 (9)	Halmstad region
10 (11)	Skaraborg region

## NORDIC COMPARISON OF CARGO HANDLED IN 2021\*\*

RANKING / CITY / (COUNTRY)	VOLUME OF GOODS, 1,000 TONNES
1 Gothenburg (Sweden)	36,836
2 Helsinki (Finland)	14,358
3 Stockholm (Sweden)	10,746
4 Aarhus (Denmark)	9,721
5 Copenhagen (Denmark)	5,632
6 Oslo (Norway)	5,332

\* Figure in parentheses indicates ranking in Logistikläget 2022.  
\*\* Statistics refer only to full service ports.

Source: Intelligent Logistik



# 2.



## Rich exchange with the world

Shipping and international trade have been integral to the Gothenburg region for more than 400 years. Of course, the traded content has changed over the years, but the flow of goods continues to play a critical role for the development and growth of the region's companies. The interest among foreign investors to run companies in the region is great and every fifth employee in the Gothenburg region works in a foreign-owned company.

### Export of goods from companies in the region

Companies in the Gothenburg region have a high export intensity. In 2022 goods were exported for just above SEK 300 billion. The region's total exports make up 80 per cent of Västra Götaland County's total export value and about one sixth of Sweden's total export value. Some important destinations, among others, are USA, Norway, Germany and China.

Source: Statistics Sweden

The Gothenburg region's

# 4,800

export companies constitute approximately two thirds of Västra Götaland County's total export companies and just over 6 per cent of all export companies in Sweden.

### Import of goods to companies in the region

Companies in the Gothenburg region also import a lot of goods globally. In 2022 goods were imported for just above SEK 238 billion. The region's total imports make up 75 per cent of Västra Götaland County's total import value and 12 per cent of Sweden's total import value. Some important origins, among others, are Germany, China, the Netherlands and Denmark.

Source: Statistics Sweden

### The composition of the region's exports and imports

The majority of the region's exported goods comprise vehicles and other means of transport - an industry which is also the largest in terms of import value. In absolute terms, exports of goods within automotive corresponded to approximately SEK 173 billion. The product groups 'Other machines and manufactured goods', 'Chemicals, pharmaceuticals, rubber and plastics' and 'Computers, electronics and optical products' also account for substantial shares of the goods exchanged with trading partners.

Source: Statistics Sweden

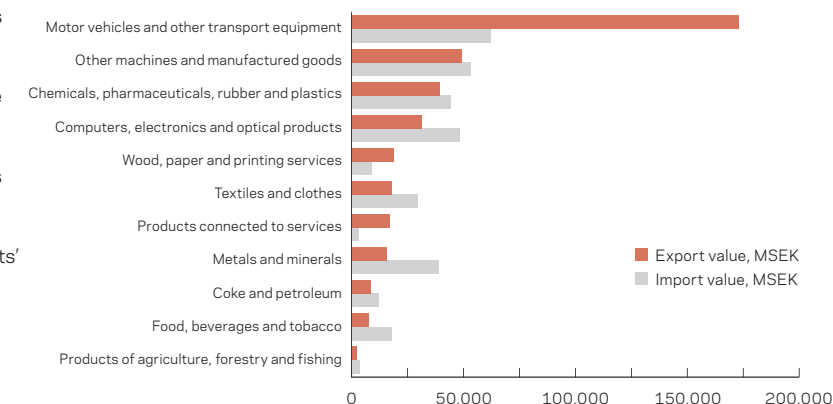
### EXPORT DESTINATIONS 2022

COUNTRY	VALUE OF EXPORTED GOODS, MSEK
USA	55,083
Norway	38,108
Germany	30,998
China	19,885
UK	19,861
Denmark	16,389
Finland	15,273
France	15,221
Netherlands	11,783
Japan	6,694
<b>Västra Götaland County total</b>	<b>376,679</b>
<b>Gothenburg region total</b>	<b>300,336</b>
<b>Gothenburg region's share of Swedish exports</b>	<b>15%</b>

### IMPORT ORIGINS 2022

COUNTRY	VALUE OF IMPORTED GOODS, MSEK
Germany	49,275
China	30,272
Netherlands	24,233
Denmark	21,973
Norway	20,191
UK	13,841
France	11,276
Finland	10,319
USA	7,006
Japan	3,223
<b>Västra Götaland County total</b>	<b>319,594</b>
<b>Gothenburg region total</b>	<b>238,551</b>
<b>Gothenburg region's share of Swedish imports</b>	<b>12%</b>

### EXPORTS AND IMPORTS OF GOODS, BY PRODUCT GROUP 2022

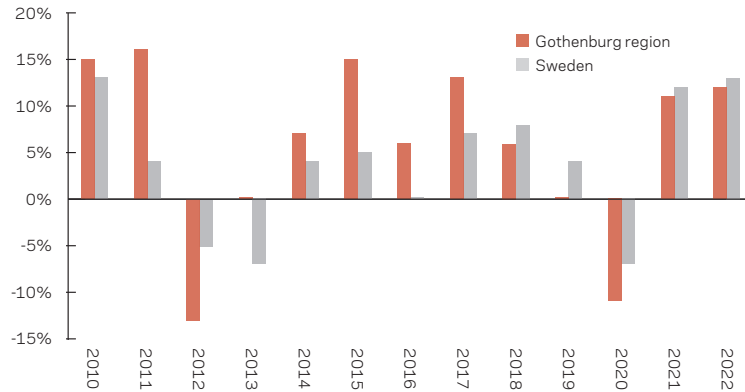


### Strong exports growth from the Gothenburg region over time

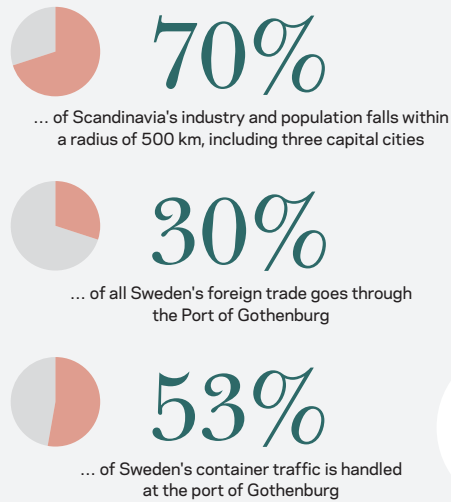
Since 2010, the business environment in the Gothenburg region has seen strong exports growth. During the boom, 2014-2018, the region recorded strong real value increases in goods exports. This development was, however, followed by only a marginal increase in the export value in 2019. As a result of the Covid-19 pandemic in 2020, the region's exports decreased by approximately 11 per cent, but in 2021 the fall was quickly regained. During 2022, the region's exports grew by just above 12 per cent in real terms.

Source: Statistics Sweden

ANNUAL REAL GROWTH IN GOODS EXPORTS IN THE GOTHENBURG REGION AND SWEDEN 2010-2022



### Port of Gothenburg - Scandinavia's largest port



### The highest value of goods exports per employee

That the Gothenburg region's companies are export-intensive can be ascertained by studying exports per employee in the private sector. In 2022, the value of exports from companies in the Gothenburg region corresponded to SEK 764,000 per employee. This amount is substantially higher compared to the other two metropolitan regions and Sweden as a whole.

Source: Statistics Sweden

EXPORTS IN SEK PER EMPLOYEE IN THE PRIVATE SECTOR IN METROPOLITAN REGIONS AND SWEDEN 2022

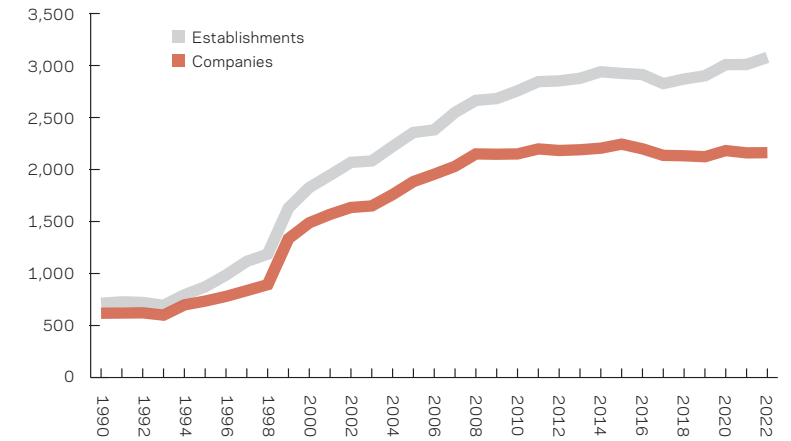


### Many foreign-owned companies in the region

Since 1990, the number of foreign-owned companies in the Gothenburg region has grown steadily. In 2022 there were approximately 2,200 foreign-owned companies in the Gothenburg region. These foreign-owned companies accounted for about 3,100 establishments in the Gothenburg region.

Source: Statistics Sweden

NUMBER OF FOREIGN-OWNED COMPANIES AND ESTABLISHMENTS IN GOTHENBURG REGION, 1990-2022

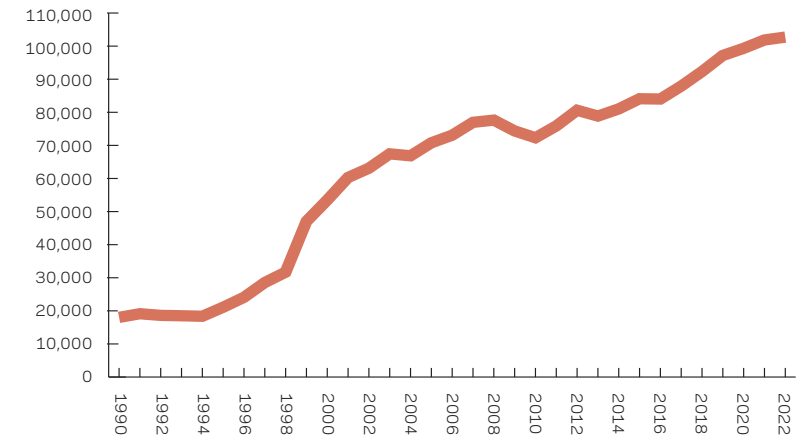


### Employees in foreign-owned companies

The number of employees in foreign-owned companies has almost quintupled in the period 1990-2022. In 2022, some 103,000 people were employed in foreign-owned companies in the Gothenburg region. This amounts to one fifth of the total employment in the region. Of these, Chinese companies employ the most, followed by companies from Norway, France, the Netherlands and Germany.

Source: Statistics Sweden

NUMBER OF EMPLOYEES IN FOREIGN-OWNED COMPANIES 1990-2022



### Norway tops the list

The list of countries with foreign ownership in the Gothenburg region is dominated by the northern parts of Western Europe. Norway tops the list as the country of ownership with most foreign-owned companies, followed by Germany and Denmark.

Source: Statistics Sweden

THE 10 MOST COMMON COUNTRIES AMONG FOREIGN-OWNED COMPANIES IN THE GOTHENBURG REGION 2022

RANK	COUNTRY	NUMBER OF COMPANIES	NUMBER OF ESTABLISHMENTS	SHARE OF FOREIGN-OWNED COMPANIES
1	Norway	405	519	19%
2	Germany	263	347	12%
3	Denmark	203	279	9%
4	USA	180	194	8%
5	Netherlands	141	246	7%
6	Finland	140	231	6%
7	UK	140	190	6%
8	France	131	255	6%
9	Luxembourg	100	183	5%
10	Switzerland	80	97	4%
<b>Gothenburg region</b>		<b>2,162</b>	<b>3,078</b>	<b>100%</b>



### Continued improvements for the hospitality sector

In 2019, approximately 7 million air passengers traveled to and from Gothenburg Landvetter Airport, while the region's hotels, holiday cottages and hostels hosted around 5 million guest nights. The Covid-19 pandemic hit the hospitality sector in the Gothenburg region and many other places around the world very hard. As a result of the pandemic, the number of air passengers and spent guest nights in the region reached a record low level in 2020. However, a distinct recovery is seen in both 2021 and 2022, especially for guest nights, whereas for air passengers there is still a bit to go in order to reach the levels in the pre-pandemic state.

Source: Swedish Transport Agency, Statistics Sweden and Swedish Agency for Economic and Regional Growth

NUMBER OF AIR PASSENGERS AND GUEST NIGHTS IN THE GOTHENBURG REGION 2000-2022

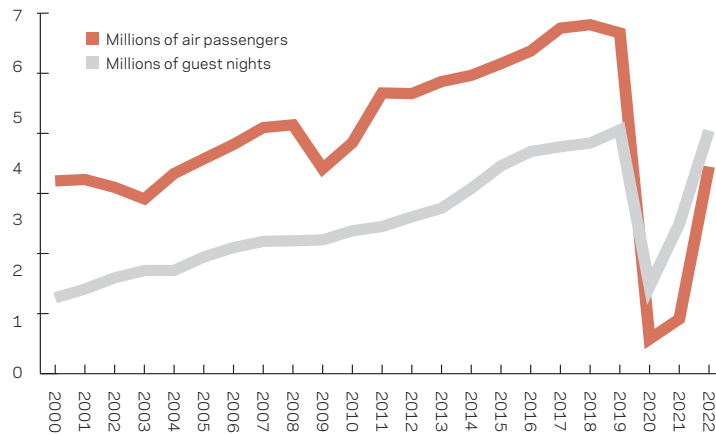


Photo: Skyflyers / Göteborg & Co

### The region's international population grows

In 2022, the Gothenburg region had about 239,000 foreign-born residents (22 per cent of the region's population). Compared with the previous year, this is an increase of 4.3 per cent, or about 9,800 foreign-born residents. Iran, Iraq and Syria top the list of countries of birth among the Gothenburg region's foreign-born population. In the past year, the strongest growth is seen among the region's foreign-born residents from India.

Source: Statistics Sweden

FOREIGN-BORN RESIDENTS IN THE GOTHENBURG REGION

COUNTRY	RESIDENTS 2021	RESIDENTS 2022	CHANGE 2021-2022	
			IN NUMBER	IN PER CENT
Iran	17,365	17,769	404	2.3%
Iraq	16,987	17,101	114	0.7%
Syria	13,099	13,752	653	5.0%
India	8,949	10,878	1,929	21.6%
Somalia	10,499	10,613	114	1.1%
Poland	9,931	10,341	410	4.1%
Bosnia and Herzegovina	9,303	9,344	41	0.4%
Finland	9,526	9,189	-337	-3.5%
Former Yugoslavia	7,794	7,689	-105	-1.3%
Turkey	6,299	6,747	448	7.1%
<b>Gothenburg region</b>	<b>229,182</b>	<b>238,949</b>	<b>9,767</b>	<b>4.3%</b>

# 3.



## Growth and labour market

The business environment in the Gothenburg region is characterised by global, knowledge-intensive companies such as Volvo, SKF and AstraZeneca. The total wage sum in the Gothenburg region is growing at a faster rate than Sweden as a whole. Above all, this growth is most prominent within construction and services. Overall, employment in the region is growing at a faster rate than the national average. A rapidly expanding knowledge-intensive business services sector supports the manufacturing companies, and the region's business environment is gaining further nuance through growing businesses within information and communication, construction and property.

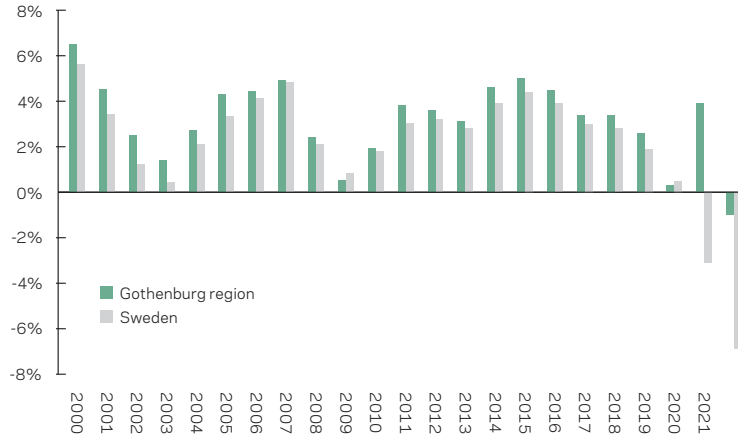
Photo: Anna Kuylenstierna / BRG

### The Gothenburg region - a Swedish growth engine

During large parts of the 2000s, the real wage sum growth in the Gothenburg region has clearly been stronger compared to Sweden as a whole. The exception is during periods of crisis, such as the aftermath of the financial crisis in 2009 and in 2020 during the Covid-19 pandemic, where Sweden's wage sum growth has been stronger than in the Gothenburg region. Due to the high inflation during 2022, the real wage sum growth has been negative for the most recent year.

Source: Statistics Sweden

ANNUAL REAL GROWTH IN TOTAL WAGE SUM 2000-2022



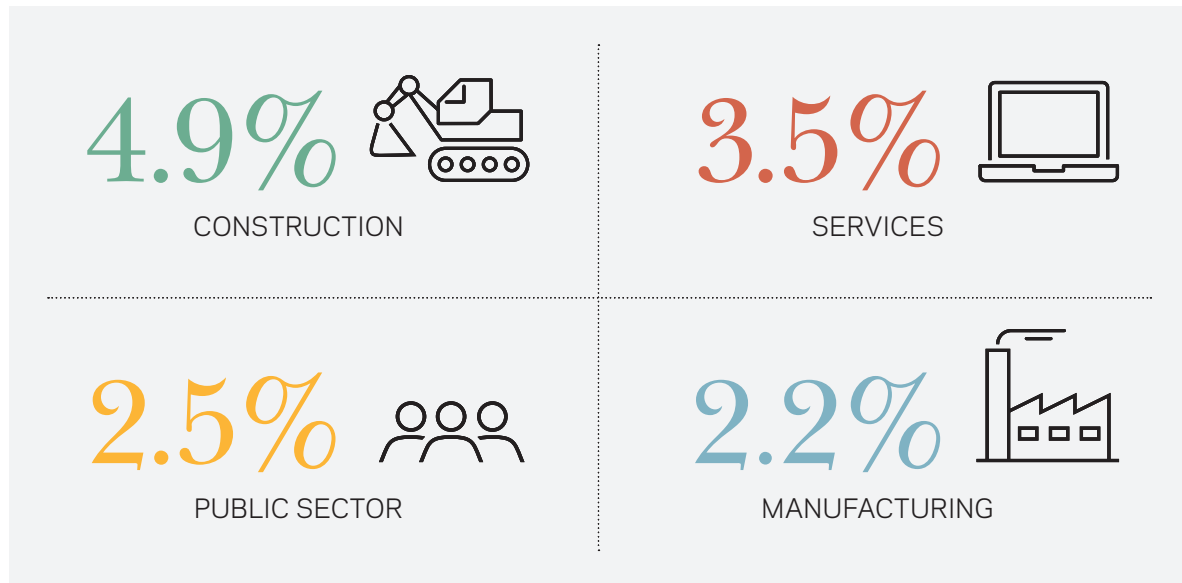
A good measure of regional growth is to assess the development of the total wage sum. The wage sum can go up as a result of increased productivity or by more people being employed.

### Construction and services have grown the most

The average annual growth in total wage sum in the Gothenburg region during the period 2010-2022 was 3.1 per cent. In terms of individual sectors, the largest growth has been seen in the construction sector, followed by the services sector.

Source: Statistics Sweden

AVERAGE ANNUAL REAL GROWTH IN WAGE SUM BY SECTOR IN THE GOTHENBURG REGION 2010-2022



### Business services employ most

Business services is the sector with the most employees in the Gothenburg region, followed by healthcare and care. Compared to Sweden as a whole, the Gothenburg region has a much larger share of employees in business services, information and communication and within commerce. However, among the larger sectors the Gothenburg region has a much smaller proportion of employees within healthcare and care.

Source: Statistics Sweden



86,517

employees in business services in the Gothenburg region in 2021

### Stronger employment growth in the Gothenburg region

In 2021, about 556,000 people were employed in the Gothenburg region. This represents an increase of 39 per cent since the year 2000, or approximately 157,000 employed persons.

Source: Statistics Sweden

555,794

the number of people employed in the Gothenburg region in 2021

EMPLOYED +16 YEARS OF AGE, BY SECTOR 2021

SECTOR	GOTHENBURG REGION	%	SWEDEN	%
Business services	86,517	15.6	632,888	12.4
Healthcare and care	79,391	14.3	817,333	16.0
Commerce	68,867	12.4	595,192	11.7
Manufacturing and mining	62,184	11.2	548,288	10.7
Education	56,136	10.1	547,123	10.7
Construction	38,439	6.9	373,107	7.3
Public administration	32,947	5.9	321,861	6.3
Information and communication	30,743	5.5	230,567	4.5
Transportation and warehousing	27,369	4.9	229,912	4.5
Cultural and personal services	24,089	4.3	228,820	4.5
Hotels and restaurants	20,268	3.6	176,365	3.5
Property	9,834	1.8	87,839	1.7
Financial services and insurance	7,390	1.3	100,769	2.0
Energy and the environment	4,818	0.9	55,195	1.1
Unknown	4,200	0.8	62,304	1.2
Agriculture, forestry and fishing	2,602	0.5	96,616	1.9
<b>Total</b>	<b>555,794</b>		<b>5,104,179</b>	

EMPLOYMENT GROWTH IN THE GOTHENBURG REGION AND SWEDEN 2000-2021

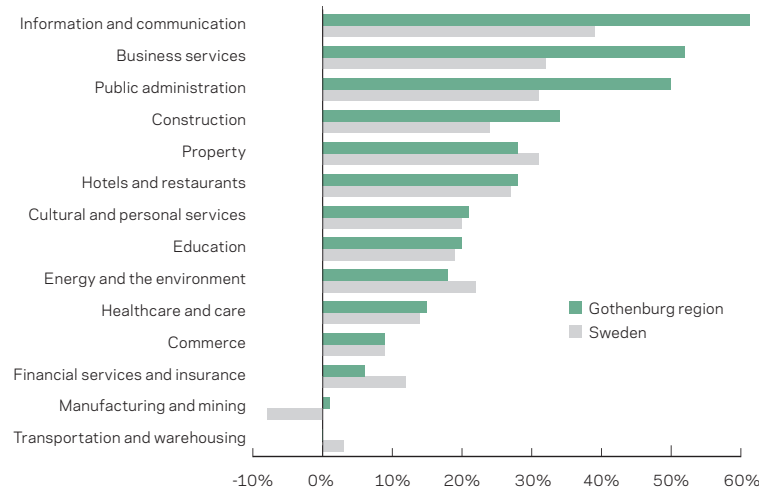


### Greatest job growth in information and communication

Almost all sectors in the Gothenburg region have seen an increase in the number of employees since 2010. Transportation and warehousing is the only sector that has marginally shrunk over the period. The Swedish manufacturing and mining sector shows negative growth, while the corresponding sector in the Gothenburg region sees a marginal increase. Information and communication is the sector with the strongest percentage increase. In terms of number of employed people, however, business services is the sector in the Gothenburg region that has grown the most since 2010. Compared to Sweden, the Gothenburg region has a clearly stronger job growth in information and communication, business services, public administration, construction and manufacturing and mining.

Source: Statistics Sweden

PERCENTAGE CHANGE IN EMPLOYMENT, BY SECTOR 2010-2021

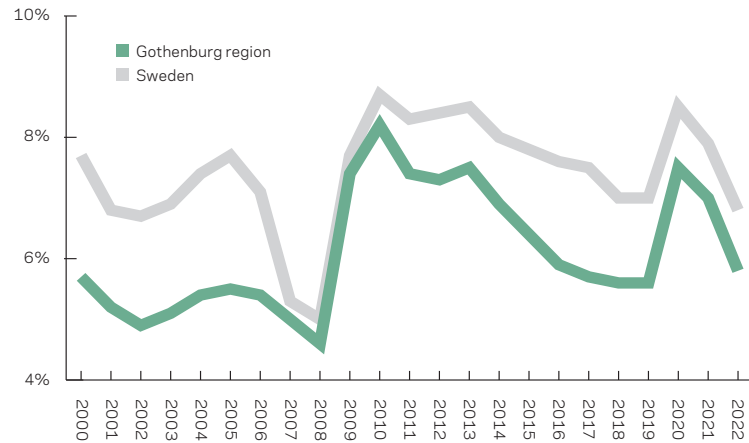


### Lowest unemployment among metropolitan regions

During the Covid-19 pandemic the unemployment increased throughout all of Sweden. The development during 2021 and 2022 shows, however, that the unemployment rate has decreased. In 2022, unemployment in the Gothenburg region averaged at 5.8 per cent and is still the lowest among the country's metropolitan regions, and 1 percentage point lower than the national average.

Source: Swedish Public Employment Service and Statistics Sweden

UNEMPLOYMENT AMONG PERSONS 16-64 YEARS OLD, ANNUAL AVERAGE FROM YEAR 2000



Gothenburg region will have about **250,000** office-based employees by 2035

Source: Evidens



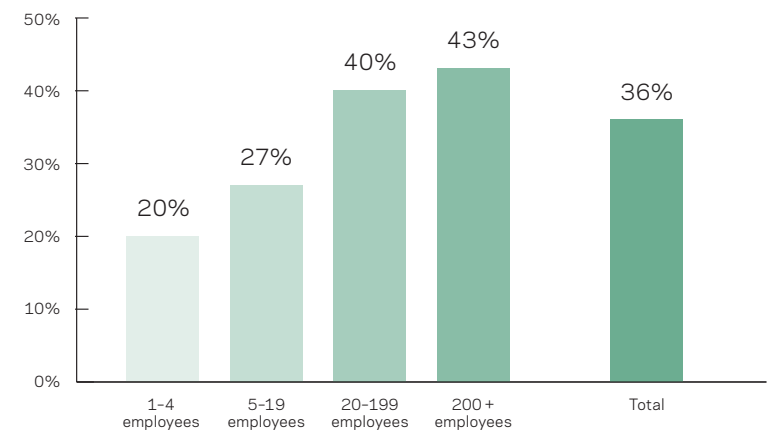
Photo: Jacob Lund / Shutterstock

### Employment growth by companies' size category

Up until 2019, the most rapid employment growth was seen in the regions smaller companies. Yet, the Covid-19 pandemic has caused the employment growth to decrease strongly in smaller companies, while larger companies have withstood the pandemic better up until 2022. In the period 2010-2022, employees in companies with more than 200 employees increased by 43 per cent. Also the other size categories demonstrate strong growth in terms of employees. However, in absolute terms, the two largest size categories report the largest increase. Just above 122,000 people were hired by companies in the two largest size categories during the period 2010-2022.

Source: Statistics Sweden

PERCENTAGE CHANGE IN EMPLOYEES, BY SIZE CATEGORY 2010-2022



**127,699**

establishments in the Gothenburg region in 2022

### Small companies account for the majority of the region's establishments

The Gothenburg region's numerous small companies provide the majority of the region's establishments. The sector with the largest number of establishments, just above 29,500, is business services, with a clear majority made up of smaller establishments. Commerce, cultural and personal services as well as property and construction also have many establishments in the region.

Source: Statistics Sweden

ESTABLISHMENTS IN THE GOTHENBURG REGION 2022, BY SECTOR AND SIZE CATEGORY

SECTOR	ESTABLISHMENTS WITH NO EMPLOYEES	1-4 EMPLOYEES	5-19 EMPLOYEES	20-199 EMPLOYEES	200+ EMPLOYEES	TOTAL
Business services	19,460	7,495	1,705	780	63	29,503
Commerce	8,461	3,564	2,589	705	22	15,341
Cultural and personal services	11,907	2,228	729	198	7	15,069
Property	10,817	1,153	239	82	5	12,296
Construction	5,386	3,105	1,292	445	10	10,238
Information and communication	5,595	2,558	551	290	19	9,013
Agriculture, forestry and fishing	8,038	228	53	6	0	8,325
Healthcare and care	3,053	1,218	952	666	43	5,932
Education	2,752	554	855	663	14	4,838
Manufacturing and mining	2,954	932	572	296	32	4,786
Hotels and restaurants	1,496	1,048	1,018	335	4	3,901
Transportation and warehousing	1,939	963	494	270	19	3,685
Financial services and insurance	2,874	429	151	55	8	3,517
Unknown	474	41	4	0	0	519
Energy and the environment	254	78	66	41	3	442
Public administration	15	28	56	157	38	294
<b>Gothenburg region total</b>	<b>85,475</b>	<b>25,622</b>	<b>11,326</b>	<b>4,989</b>	<b>287</b>	<b>127,699</b>



## 4.



## Business

The Gothenburg region is home to a broad and multi-faceted business environment. 93 per cent of Sweden's industries are represented in the region, more than 750 different industries. Some of the world's leading companies within their sectors are headquartered in the region. The Gothenburg region is also characterised by a strong entrepreneurial spirit and just over 8,100 companies were started in 2022.

### The largest companies by employees

The majority of the largest companies in the Gothenburg region engage in research and development at a world-leading level. Volvo Cars, with its development and production in Torslanda in Gothenburg, is the single largest employer in the private sector in the Gothenburg region. In total, the Volvo Group has over 12,500 employees in the Gothenburg region.

Source: Statistics Sweden

### Home to Sweden's two largest companies

The list of the companies\* reporting the highest turnover is topped by the Volvo Group and Volvo Cars, which also are the two companies with the highest turnover in Sweden. SKF takes the third place, followed by the Stena Sphere and Carl Bennet.

\* Only companies with their head office in the Gothenburg region.

Source: Largest Companies

### Companies with the highest market value

One more way of assessing a company's size is to consider its market value\*. Of the companies based in the Gothenburg region, the Volvo Group tops the list followed by the investment company Latour, Volvo Cars and SKF.

\* Only listed companies with their head office in the Gothenburg region.

Source: Avanza

#### LARGEST COMPANIES IN THE GOTHENBURG REGION BY NUMBER OF EMPLOYEES

RANK	COMPANY	NUMBER OF EMPLOYEES 2022
1	Volvo Cars	16,475
2	Volvo Trucks*	3,525
3	Chalmers University of Technology	3,075
4	Volvo Technology*	2,975
5	Veteranpoolen	2,725
6	AstraZeneca	2,725
7	SKF	2,400
8	Lernia Bemanning	2,325
9	Samhall	2,075
10	Ericsson	2,075

\*Part of the Volvo Group, which employs more than 12,500 people in the Gothenburg region.

#### LARGEST COMPANIES IN THE GOTHENBURG REGION BY TURNOVER

RANK	COMPANY	TURNOVER 31-12-2021, MSEK
1	Volvo Group	372,216
2	Volvo Cars	282,045
3	SKF	81,732
4	Stena Sphere*	67,182
5	Carl Bennet**	65,298
6	Bilia	35,509
7	Hedin Group	34,486
8	Willy:s	32,424
9	CellMark	31,469
10	Ekman Group	20,869

\* Reported here as group including Stena and Stena Metall.

\*\* Reported here as a group including Getinge, Lifco, Elanders, Dragesholm and Symbrio.

#### LARGEST LISTED COMPANIES IN THE GOTHENBURG REGION BY MARKET VALUE

RANK	COMPANY	MARKET VALUE 01-03-2023, MSEK
1	Volvo Group	421,180
2	Latour	141,788
3	Volvo Cars	141,601
4	SKF	89,822
5	Getinge	59,975
6	Balder	57,128
7	Castellum	45,118
8	Vitrolife	28,606
9	Wallenstam	27,614
10	Hexatronic Group	25,150

### Every tenth company is started in the Gothenburg region

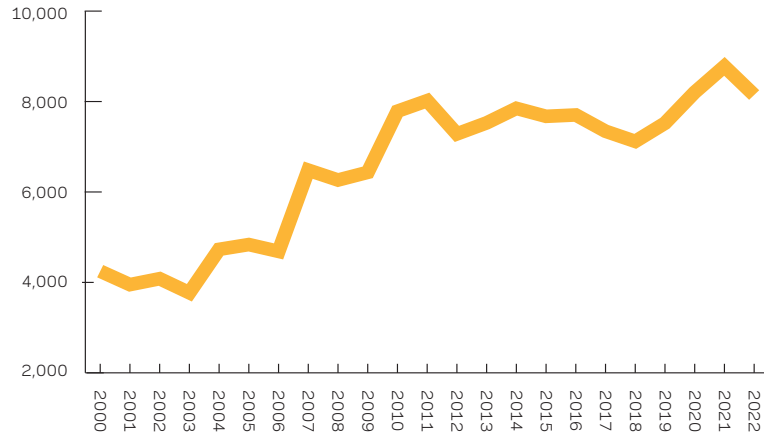
The Gothenburg region is making great efforts to facilitate the process of starting a company. Since 2000, the number of newly started companies in the region has more than doubled. In 2022, approximately 8,100 new companies were started in the Gothenburg region, corresponding to just over 11 per cent of all newly started companies in Sweden.

Source: Growth Analysis

# 8,144

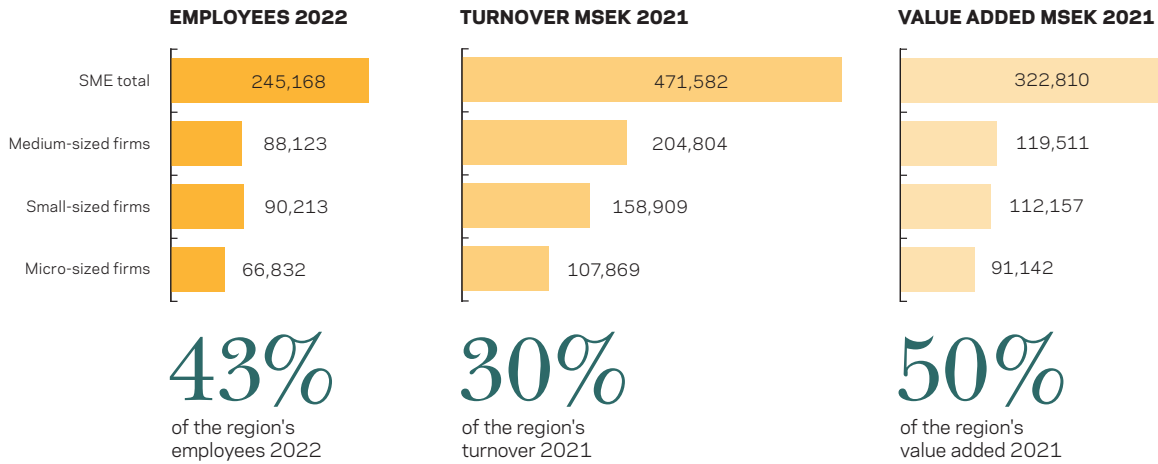
newly started companies in 2022

NUMBER OF NEWLY STARTED COMPANIES IN THE GOTHENBURG REGION 2000-2022



### The region's small and medium-sized enterprises (SME)

Source: Statistics Sweden

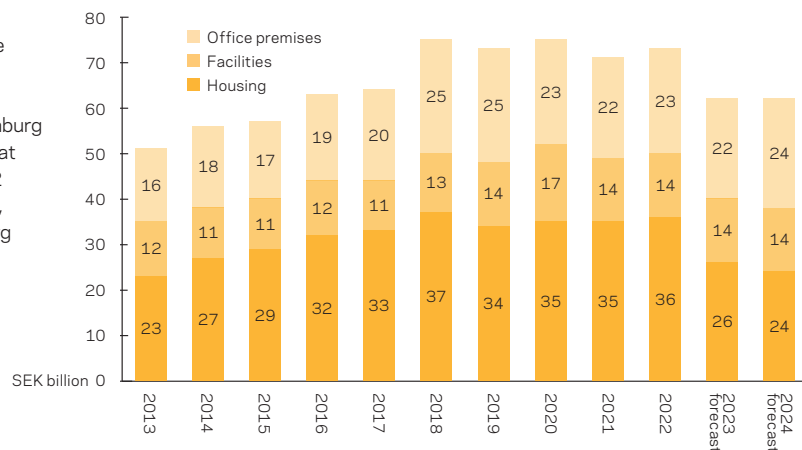


### Investments in housing and offices in the Gothenburg region

Large construction projects will proliferate in the coming years. During 2022 about SEK 72 billion was invested in housing, facilities and office premises in the Gothenburg region. The forecast for 2023 indicates that the investment volume will total at SEK 62 billion. From 2016 and up until year 2035, total investment volumes in the Gothenburg region are expected to amount to over SEK 1,000 billion.

Source: Swedish Construction Federation

REAL INVESTMENT VOLUME IN SEK BILLIONS IN OFFICES, FACILITIES AND HOUSING IN THE GOTHENBURG REGION - FROM 2013



### Commerce and manufacturing have the highest turnover

In 2021, the total turnover in the Gothenburg region was about SEK 1,554 billion. Commerce and manufacturing and mining accounted for more than half of the region's total turnover. Business services, construction, transportation and warehousing and information and communication also constitute a significant portion of the region's total turnover.

Source: Statistics Sweden



### The region's private sector generates high value added

The highest value added in the Gothenburg region comes from business services, followed by manufacturing and commerce. Together they make up more than half of the region's total value added in 2021, which amounts to SEK 640 billion. A reason why business services contributes greatly is that companies such as Volvo Cars, the Volvo Group, SKF, AstraZeneca and Ericsson have sub-activities that are included in this specific sector. This confirms that the traditional industrial production has integrated a growing number of technology services as goods for final consumers have become more and more advanced.

Source: Statistics Sweden

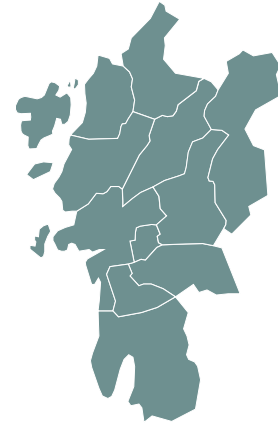
TURNOVER IN MSEK BY SECTOR 2021

SECTOR	TURNOVER 2021, MSEK	SHARE
Commerce	474,053	30.5%
Manufacturing and mining	378,061	24.3%
Business services	207,125	13.3%
Construction	109,324	7.0%
Transportation and warehousing	97,868	6.3%
Information and communication	87,075	5.6%
Property	66,828	4.3%
Financial services and insurance	32,250	2.1%
Energy and the environment	23,691	1.5%
Hotels and restaurants	16,329	1.1%
Healthcare and care	11,116	0.7%
Cultural and personal services	10,663	0.7%
Education	10,124	0.7%
Agriculture, forestry and fishing	3,674	0.2%
Public administration	2,786	0.2%
Unknown	23,319	1.5%
<b>Gothenburg region total</b>	<b>1,554,286</b>	<b>100.0%</b>

VALUE ADDED IN MSEK BY SECTOR 2021

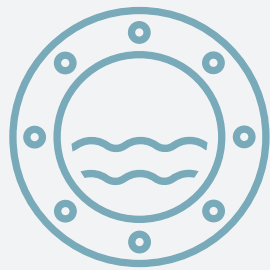
SECTOR	VALUE ADDED 2021, MSEK	SHARE
Business services	140,802	22.0%
Manufacturing and mining	111,012	17.3%
Commerce	99,139	15.5%
Construction	55,745	8.7%
Information and communication	55,340	8.6%
Property	52,314	8.2%
Transportation and warehousing	43,012	6.7%
Financial services and insurance	19,382	3.0%
Healthcare and care	18,421	2.9%
Hotels and restaurants	13,414	2.1%
Cultural and personal services	12,050	1.9%
Energy and the environment	9,580	1.5%
Education	7,202	1.1%
Agriculture, forestry and fishing	2,452	0.4%
Unknown	497	0.1%
Public administration	19	0.0%
<b>Gothenburg region total</b>	<b>640,382</b>	<b>100.0%</b>

# Strength areas in the Gothenburg region



In the Gothenburg region there are many successful clusters and strength areas that contribute to the region's prominent innovation capacity and competitiveness and the rapid green transition. Cleantech has long been a strength for the region and is integrated into all the clusters. Below are some examples.

Source: Business Region Göteborg



## MARITIME SECTOR

Gothenburg is the leading port in the Nordics and the city is a centre for research and development within marine energy extraction, biotechnology and maritime operations as well as fisheries and aquaculture. The maritime sector in the Gothenburg region comprises of about 1,400 establishments with 6,000 employees. A transition to electrified boats and bio-based fuels is currently underway within the region's maritime sector.

**6,000 employees**

## LIFE SCIENCE

Life science is one of the fastest growing industries in Gothenburg. Here you find one of Europe's largest university hospitals and one of AstraZeneca's three globally strategic R&D centres. In the coming years, the life science cluster will be further strengthened with major investments being made in Sahlgrenska Life and the new health cluster GoCo Health Innovation City.

**8,000 employees**



## CULTURAL AND CREATIVE SECTORS AND INDUSTRIES

The region's cultural and creative sectors and industries include approximately 11,000 companies in various size categories. Within fashion, architecture and media there are a number of larger companies such as NA-KD, Nudie, Lindex, Kappahl, Liljevall, Wingårdh, White, Tengbom and Forsman & Bodenfors.

**17,000 employees**



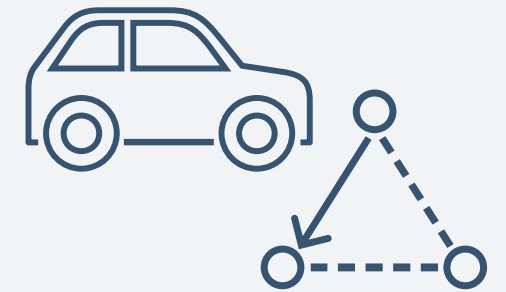
Pressphoto Einride

## AUTOMOTIVE, LOGISTICS AND MOBILITY

The Gothenburg region is Scandinavia's most important logistics hub, and is also national centre for R&D within sustainable logistics and mobility solutions. Here you find leading competence within logistics and an advanced transportation infrastructure. The automotive cluster in the Gothenburg region is world leading in safety, electrification, autonomous engineering technology and connected vehicles.

The cluster is home to companies such as Volvo Cars, the Volvo Group, Geely, CEVT, Polestar, Einride, Ecoride and Stena Line, as well as to many large and specialised tech, design and service suppliers to the automotive industry. Micromobility is a growing sector in the region with 122 companies and approximately 5,600 employees.

**Automotive 36,000 employees**  
**Logistics and mobility 27,000 employees**



## ICT AND SPACE

The Gothenburg region is home to cutting edge expertise in several fields. The ICT companies in the region hold a strong position in areas such as embedded systems, infrastructure and cloud, microwaves, mobile technologies as well as visualisation and gaming. Examples of companies in the region include Ericsson, SAAB, Volvo Technology, HCL, Qamcom, Carmenta, GKN Aerospace and Beyond Gravity.

**ICT 36,000 employees**  
**Space 5,600 employees**



# 5.



## Population, lifestyle and education

More people are choosing to live in the Gothenburg region and as of today more than one million people live here. The population is relatively young and more highly educated compared to the national average. Access to academic education and world-class companies makes the region more attractive. The Gothenburg region's two universities collectively have around 67,000 students. In terms of human capital and lifestyle, Gothenburg ranks highly among large European cities.

Photo: House of Vision / Göteborg & Co

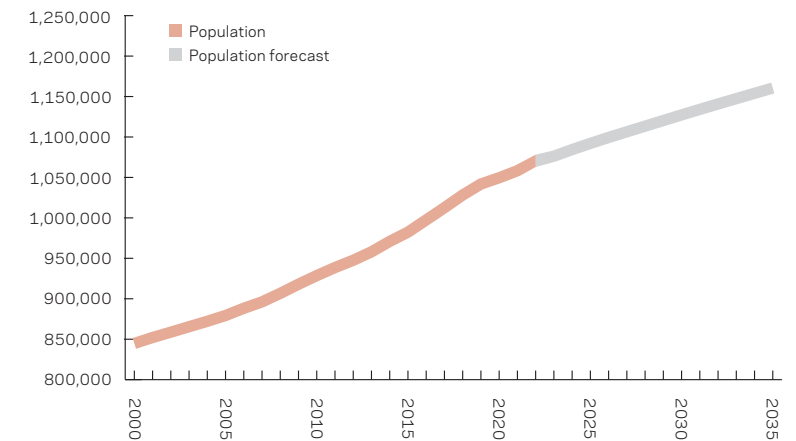
### Population growth continuing

For many years, the Gothenburg region has had birth and migration surpluses. During 2022, the region's population increased by about 13,000 residents. By 2035, the region is expected to be home to just over 1.2 million people.

Source: Statistics Sweden

**1,070,935**  
residents in the Gothenburg region in 2022

**POPULATION IN THE GOTHENBURG REGION 2000-2022 AND FORECAST FOR THE PERIOD 2023-2035**

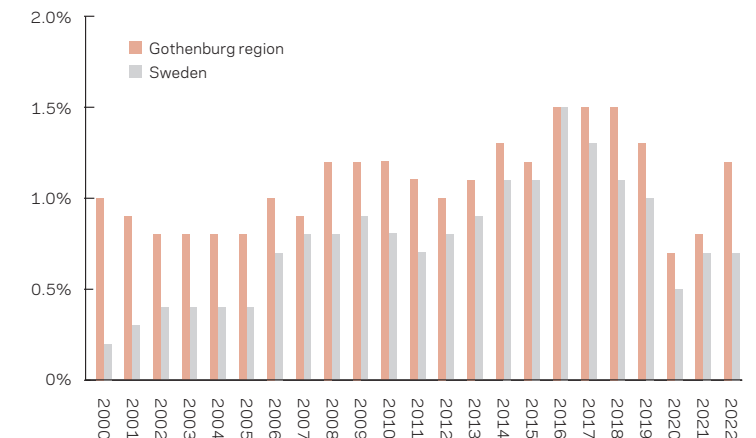


### Stronger population growth than Sweden as a whole

Every year since 2000, the Gothenburg region's population has increased by around one per cent. The region has throughout the entirety of the 2000s seen a greater population growth than for Sweden as a whole.

Source: Statistics Sweden

**YEARLY POPULATION GROWTH 2000-2022**

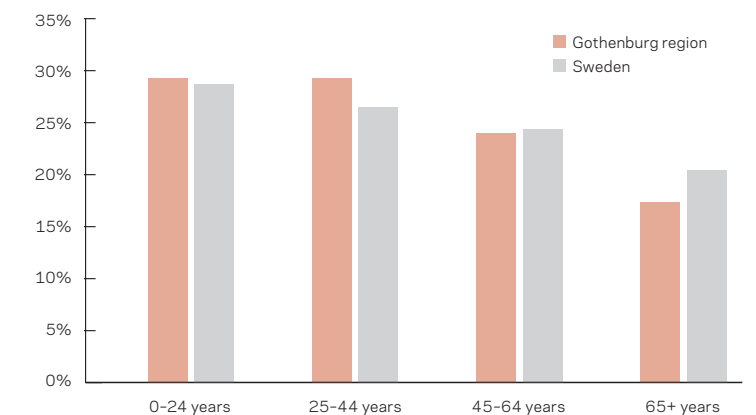


### Younger than the national average

A comparison with Sweden's average age breakdown in 2022 shows that the Gothenburg region has a relatively young population. The share of age group 0-44 years is larger than the national average, while the share for age group 45 years and older is smaller.

Source: Statistics Sweden

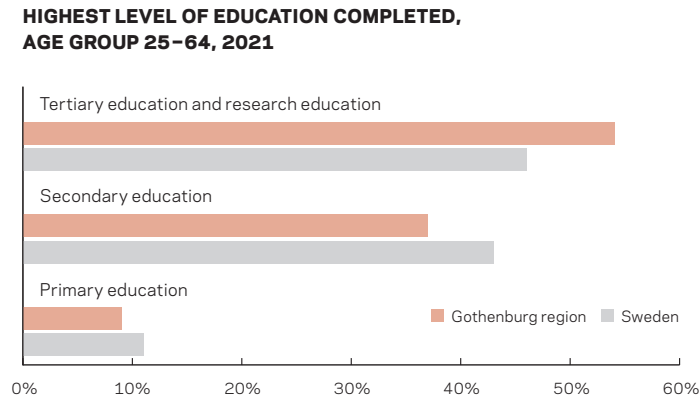
**POPULATION BY AGE GROUP 2022**



### Tertiary education level higher than the national average

Compared to Sweden as a whole, a larger proportion of the 25–64 age group in the Gothenburg region has a post-secondary education, which here also includes research education.

Source: Statistics Sweden



## The Gothenburg lifestyle

**Gothenburg, UNESCO's City of Literature**

Source: Cities of Literature, 2022

**The world's most sustainable destination**

Source: Global Destination Sustainability Index, 2022

**3rd place**

Among Europe's large cities, Gothenburg ranks third in the category 'Human Capital and Lifestyle'.

Source: JDi Intelligence, 2023

**67,000 students**

The region's two largest seats of learning are the University of Gothenburg, with some 56,000 students, and Chalmers University of Technology, with almost 11,000 students. Both universities are among the world's best in several research fields.

Source: University of Gothenburg and Chalmers University of Technology, 2023

**7th**

of 496 cities most liveable city in the world for European expats.

Source: ECA International, 2022

6.



## Costs and taxes

The Gothenburg region is a competitive location for businesses. The corporate tax rate is low and the rental market is among the hottest in Europe. In addition, foreign key workers in Sweden are granted a certain degree of tax relief.

### Employer contributions

All employers pay social security contributions for their employees. These comprise of contributions for pensions, healthcare and other social benefits. The contributions amount to a total of 31.42 per cent.

Source: Swedish Tax Agency

#### STATUTORY EMPLOYER CONTRIBUTIONS

	% OF WAGE 2023
Retirement pension	10.21
Survivor's pension	0.60
Health insurance	3.55
Parental insurance	2.60
Occupational injury insurance	0.20
Unemployment insurance	2.64
Payroll contribution	11.62
<b>Total statutory employer contribution</b>	<b>31.42</b>

#### MARKET SALARY STATISTICS 2022\*

PROFESSION	MONTHLY SALARY (SEK)			
	10TH PER-CENTILE	40TH PER-CENTILE	60TH PER-CENTILE	90TH PER-CENTILE
Economics and finance managers	41,200	60,000	73,400	111,800
Economics and finance operation managers	45,300	57,800	69,000	99,000
Human resources managers	43,300	60,600	71,200	110,000
Management and planning managers	51,000	63,000	74,900	142,000
Management and planning operations managers	35,500	52,000	60,900	86,700
Sales and marketing managers	45,700	62,900	74,400	106,600
Sales and marketing operations managers	44,200	59,700	68,200	93,700
IT managers	51,100	67,400	78,700	111,800
IT operations managers	48,300	63,200	69,800	92,800
Managers in information, communication and PR	42,900	67,000	78,000	132,100
Operations managers in information, communication and PR	44,500	60,000	68,300	94,000
Managers in purchase, logistics and transportation	39,000	55,200	67,200	97,500
Operations managers in purchase, logistics and transportation	37,300	51,400	60,200	83,400
Auditors, accountants and economists	30,700	40,700	47,300	67,200
Organisation development experts	36,000	46,000	54,700	76,000
Market analysts and marketing specialists	33,500	44,500	51,100	68,500
Systems analysts and software engineers	40,500	51,000	56,200	70,000
Software and systems developers	35,300	44,200	49,500	62,300
Engineers and technicians in construction	33,000	40,400	46,000	59,800
Engineers and technicians in electrotechnology	34,900	44,000	49,100	62,900
Engineers and technicians in chemistry and chemical engineering	32,500	37,600	43,600	57,000
Computer technicians	28,800	37,700	42,200	53,000
Business salesperson	30,500	42,600	49,500	65,400
Purchasers and procurers	34,000	42,100	48,000	61,800
Administrative assistants	25,000	31,400	34,500	44,400
Sales person in commerce	25,700	29,900	32,300	44,300

### Salary levels in the Gothenburg region

Presenting income distribution using percentiles gives a good picture of the most common wage levels. In this table, the figure in the column for the 10th percentile corresponds to the maximum wage earned by 10 per cent of that category. An example, 10 per cent of the IT managers earn SEK 51,100 or less, whereas 60 per cent of the same profession category earn SEK 78,700 or less.

\* The numbers are rounded to the nearest hundred.

Source: Almega, September 2022

# 25%

tax relief for foreign key staff during their first five years in Sweden

Source: Taxation of Research Workers Board, 2023

# 20%

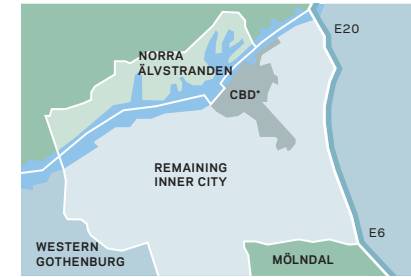
tax reduction for employees who systematically and qualifiedly work with R&D for commercial purposes

Source: Swedish Tax Agency, 2023

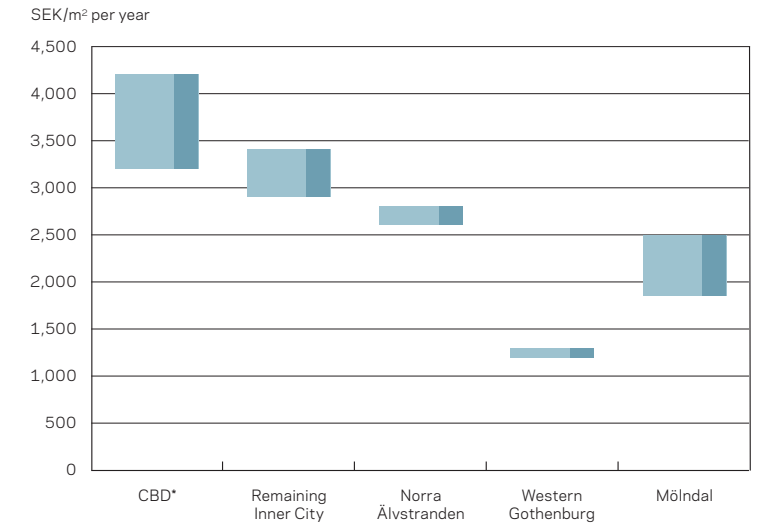
### Office rental

Office rental prices vary between different districts in Gothenburg. The map below provides an overview of the various areas of Gothenburg, with a summary of rental prices for these areas listed to the right. The highest rents are charged in the Central Business District (CBD), while the lowest rents are observed in Western Gothenburg.

Source: JLL



#### OFFICE LEASES BY AREA IN GOTHENBURG, 2022



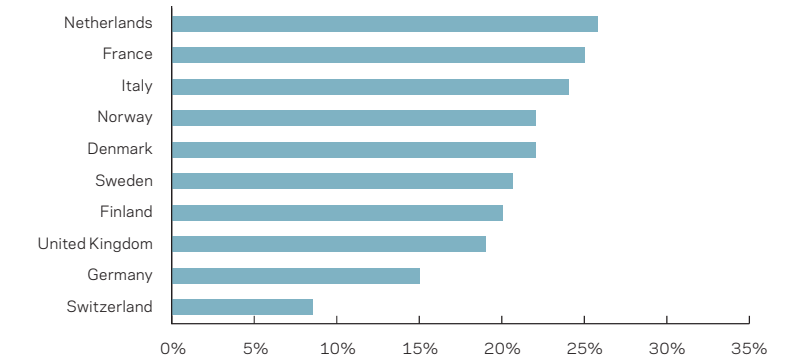
\* Central Business District.

### Competitive corporate tax

In a European context, Sweden's corporate tax rate is competitive. The corporate tax rate in Sweden in 2023 is 20.6 per cent.

Source: Deloitte, 2023

#### CORPORATE TAX RATES – A EUROPEAN COMPARISON 2023



### Comparison of taxes

Since 2013, Sweden has become one of the most attractive places in the world for holding companies. Sweden offers around 90 tax treaties in addition to the low corporate tax rate. Sweden's tax climate also holds up well in comparison to other countries, as companies are not taxed on interest income, share dividends and royalties.

Source: Deloitte, 2023

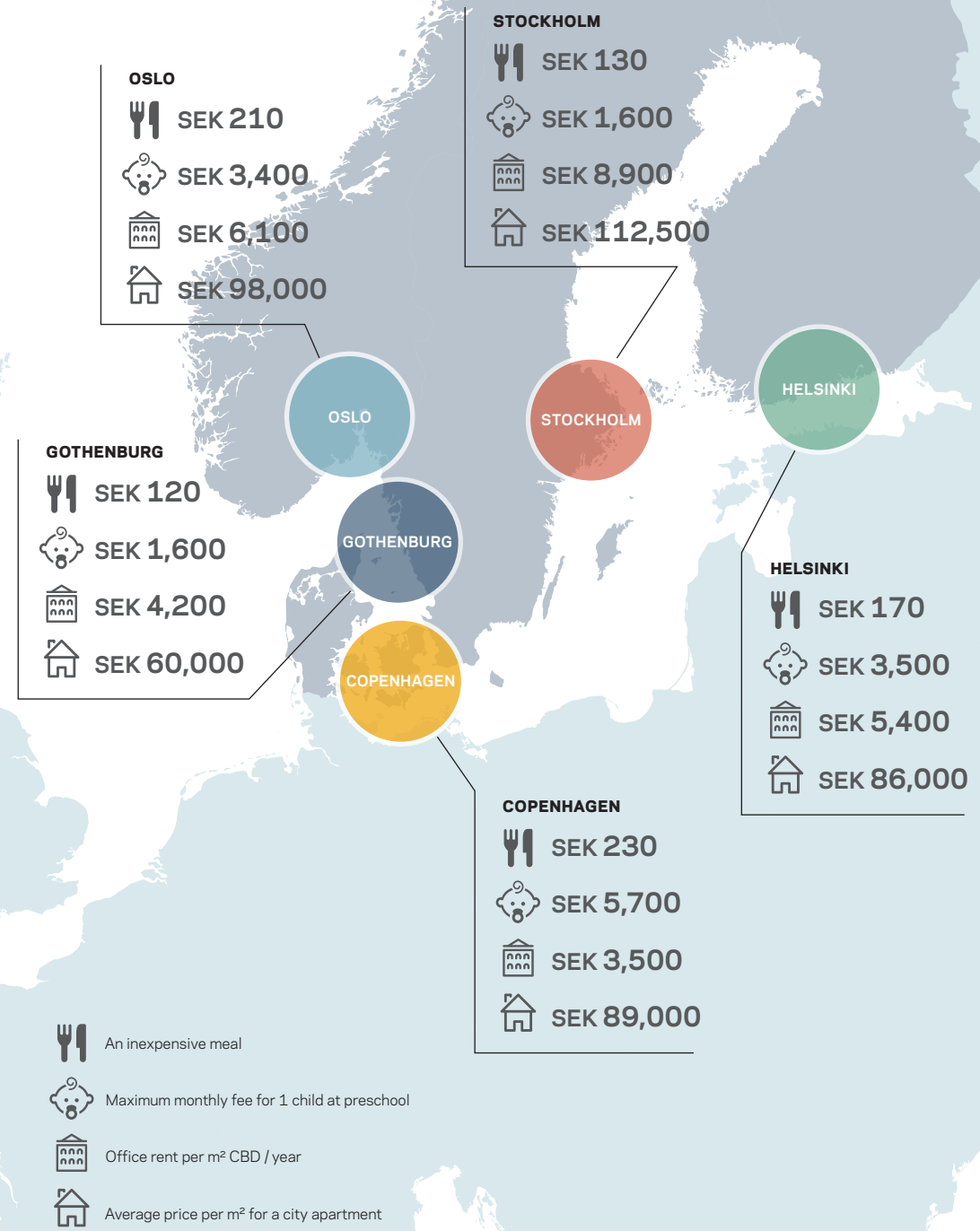
#### WITHHOLDING TAX RATES 2023\*

TYPE OF TAX	SWEDEN	DENMARK	NORWAY	FINLAND	FRANCE	GERMANY	NETHERLANDS	UNITED KINGDOM	USA
Interest	0%	0%	0%	0%	0%	0%	0%	0%	0%
Dividends	0%	0%	0%	20%	25%	25%	0%	0%	30%
Royalties	0%	22%	0%	20%	25%	15%	0%	20%	30%

\* Rates apply to payments to non-residents.



## Nordic cost comparison 2023



Sources: Numbeo, each city's official homepage, JLL and Global Property Guide.  
Exchange rates from NOK to SEK, DKK to SEK and Euro to SEK retrieved on 16 February 2023.

# 7.



## Climate, environment and sustainable development

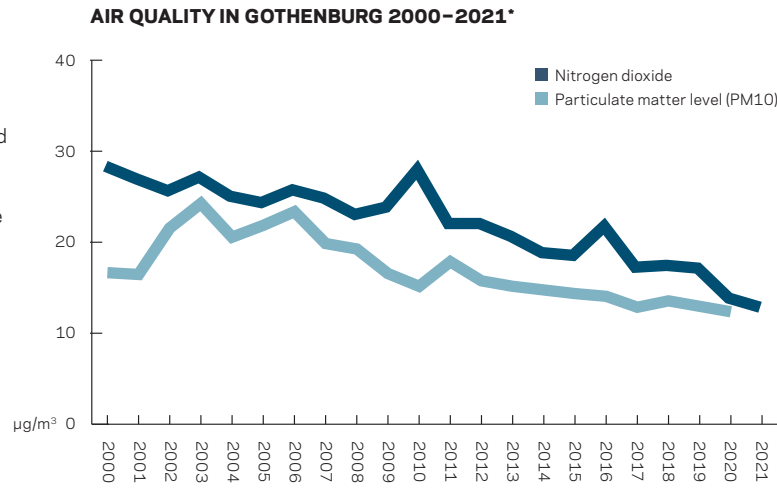
The Gothenburg region boasts world-leading competence in solutions for reduced CO<sub>2</sub> emissions and cleantech solutions. The region has partnerships involving energy, smart urban development, climate-neutral construction including circular materials and products and emission-free transports aiming to reduce the impact on the environment. Areas that have met considerable success are among other things electrification and energy efficient and climate-neutral buildings. Another sign that the region is heading in the right direction is that the interest in green bonds has been huge, and new issues of green bonds have been proliferating at a record pace.

### Better air quality in Gothenburg

For decades, Gothenburg has worked actively to continuously improve the city's air quality. Over the longer term, Gothenburg has reduced airborne nitrogen dioxide levels. During the past 10 years, the city has even managed to reverse the upward trend in coarse particulate matter levels (PM10).

\* Air quality is based on statistics obtained from the 'Femman' measuring station in Gothenburg.

Source: Environmental Administration, City of Gothenburg

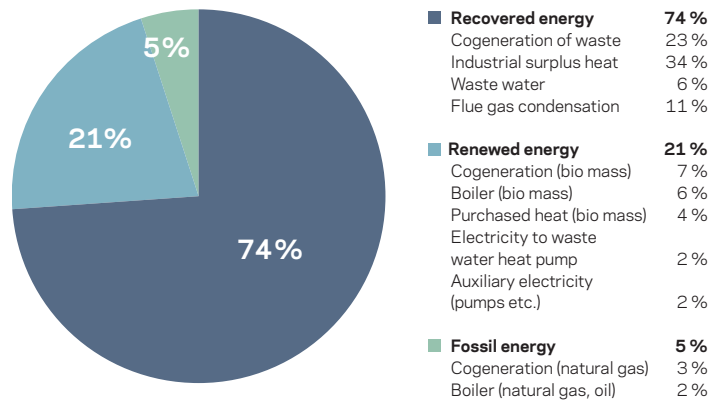


### Making the city cooler

In recent years, a district cooling network has been developed for offices, hospitals, factories and other buildings. The technology is simple, quiet and resource-efficient, with the cooling coming from recovered energy and the cold water of the river Göta Älv in Gothenburg. To supply Gothenburg with heat, we also have a far-reaching district heating system used to distribute energy from different heat sources. The district heating network heats 90 per cent of the apartment buildings in Gothenburg, some 10,000 houses and countless factories, offices, shops and other public buildings. The district heating system enables us to utilise a large amount of energy that would otherwise dissipate into the atmosphere or the sea.

Source: Göteborg Energi

### SUPPLIED ENERGY INCLUDING PRODUCTION METHOD FOR GOTHENBURG'S DISTRICT HEATING SYSTEM 2022



Source: Göteborg Energi

### A greener Port of Gothenburg

The Port of Gothenburg plans to reduce carbon emissions by 70 per cent by 2030 including emissions from vessels sailing in and out of the port traffic area. In order to reach this ambitious target, they work with world leading solutions such as:

- shoreside power for tankers
- infrastructure and access to fossil-free fuels for heavy vehicles and vessels, including electric power, biofuels, methanol, ammonia, biogas, and hydrogen gas
- fossil and emission free battery powered vessels
- infrastructure for storage and transportation of liquefied carbon dioxide extracted using Carbon Capture and Storage (CCS) technology
- The Port of Gothenburg collaborates with Volvo Group, Scania and Stena Line within the Tranzero initiative, where heavy vehicles are going to be offered commercially to enable emission-free land transportation, and before 2030, Stena Line will launch new fossil-free ships on the route Gothenburg-Fredrikshamn

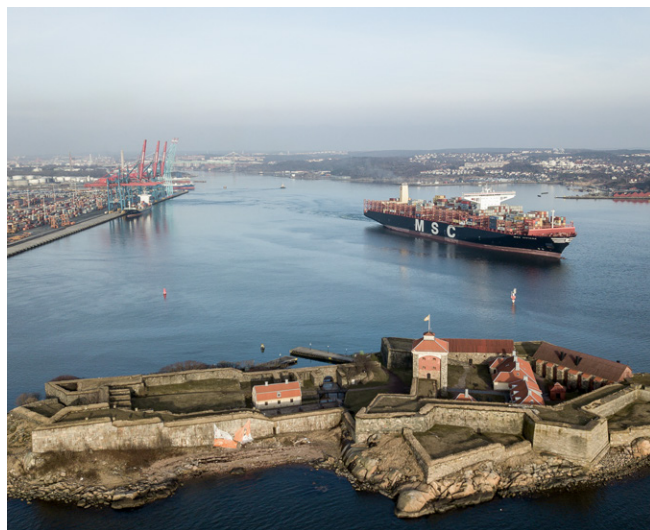


Photo: Port of Gothenburg

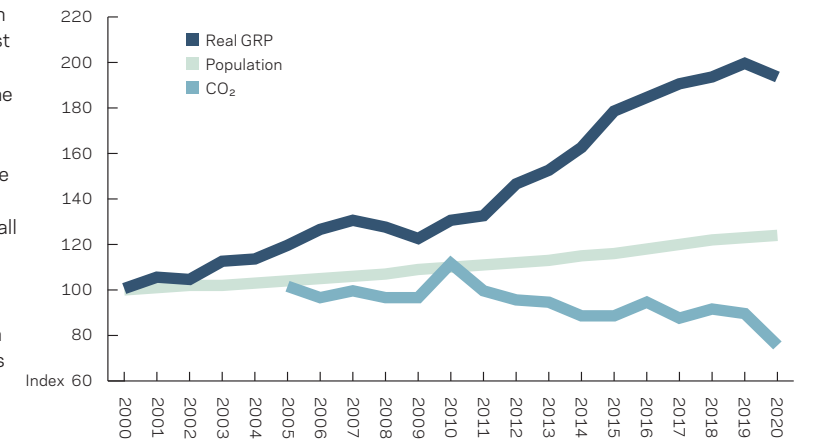
### CO<sub>2</sub> emissions and economic activity

The Gothenburg region's emissions of carbon dioxide have been at a constant level for most of the 2000s. At the same time, the region's economic growth has almost doubled, and the population has increased by 24 per cent, meaning that the emissions per growth unit have decreased\*. Since 2000, carbon dioxide emissions in the region have decreased by 11 per cent (up until 2019, since the index fall in 2020 is distinctly driven by the Covid-19 pandemic), despite the three large refineries in Gothenburg and the chemical plants in Stenungsund. Altered production patterns in energy production meant that CO<sub>2</sub> emissions spiked in both 2010 and 2016, but the general trend is going downwards.

\* We can only measure emissions produced in the Gothenburg region.

Source: Statistics Sweden and Swedish National Emissions Inventory

### REAL GROSS REGIONAL PRODUCT (GRP), POPULATION AND CO<sub>2</sub> IN THE GOTHENBURG REGION (INDEX 2000 = 100)



The City of Gothenburg has in its 'Environment and Climate Programme' adopted the goals of reducing the climate impact in all building and construction projects by 50 per cent as early as 2025 and by as much as 90 per cent by 2030.

Source: City of Gothenburg



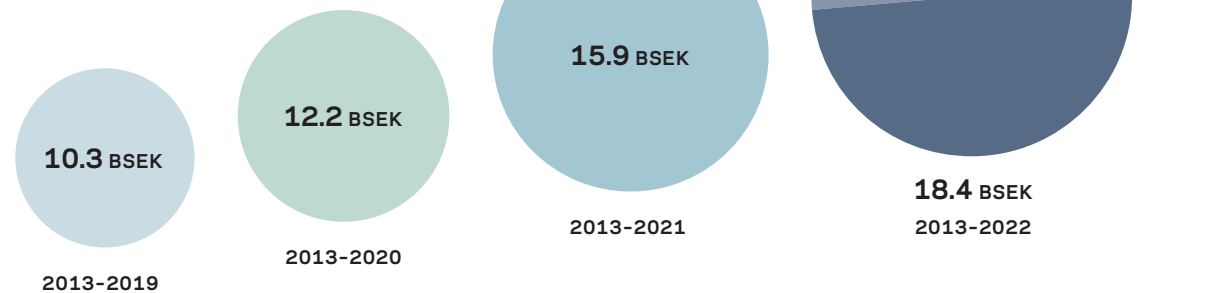
Photo: Link Arkitektur

### Green bonds contribute to sustainable growth

The City of Gothenburg issues bonds to finance various environmental initiatives and was first in the world to distribute green bonds. Green bonds valued at just above SEK 2.5 billion were issued in 2022. The market shows great interest in green bonds and since the start in 2013, green bonds totaling some SEK 18 billion have been issued.

Source: City of Gothenburg

### GREEN BONDS, TOTALLY ALLOCATED

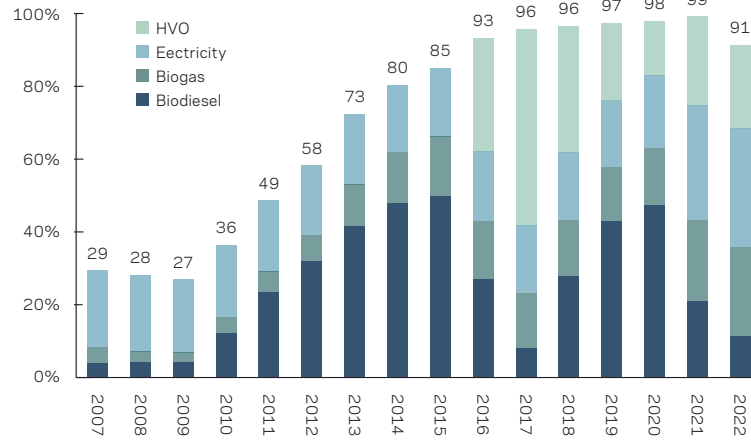


## More travel fuelled by renewables

More and more travels in public transportation are made with renewable fuels. In 2007, about one third of public transportation in the Gothenburg region was powered by renewable fuels. By 2022, this figure was 91 per cent. Electricity, biogas, biodiesel and HVO have contributed the most to phasing out non-renewable fuels in the region's public transportation.

Source: Västtrafik

PERCENTAGE OF VEHICLE KILOMETERS RUN ON RENEWABLE FUEL IN PUBLIC TRANSPORTATION IN THE GOTHENBURG REGION 2007-2022



## Did you know this...

### Zero emission zones

With the initiative Gothenburg GreenCity Zone, Gothenburg is creating zero-emission zones in central parts of the city with scalable transportation solutions at a system level. Initiatives are taken in areas such as bidirectional charging of passenger cars, wireless charging of taxi cars, regional freight hubs and electrified freight transportation.

Source: Business Region Göteborg



Photo: Volvo Car Group

### #1 electric buses in the Nordics

In order to make sustainable travel more sustainable and reach the city's climate goals - electrification of the public transportation system is integral. Since 2020, Gothenburg's county, Västra Götaland, has had the most electric buses in the Nordics, and in 2023 another 160 new electric buses will be added to county's public transportation. Thus, two out of three city buses will run on electricity.

Source: Västtrafik

### 100%

All of the city's heavy vehicles for waste collection have been running on 100% fossil-free fuel since 2015.

Source: Renova

### World's most sustainable destination

For the sixth consecutive year Gothenburg is the most sustainable destination in the world according to the Global Destination Sustainability Index (GDSI) 2016-2022. GDSI measures all elements of sustainability: environmental, social and economic.

Source: GDSI, 2022

### Climate neutral city by 2030

Gothenburg's objective is to be an environmentally sustainable city by 2030. Through the EU's Cities Mission 2030 for climate-neutral cities, Gothenburg has been selected as one of 100 cities, that will act as hubs of experimentation and innovation to enable all European cities to become climate neutral by 2050.

Source: City of Gothenburg

### Climate-neutral construction

Since Gothenburg's platform for climate-neutral construction was launched in August 2022, roughly 100 companies have joined. The entire value chain work together to enable a transition to a climate-neutral construction industry.

Source: Business Region Göteborg

## MORE REPORTS FROM US!

Learn more about the business environment and doing business in the Gothenburg region from Business Region Göteborg's other reports and publications available on our website: [www.investingothenburg.com](http://www.investingothenburg.com)

### Business R&D in West Sweden

In this report we present the big picture of the business R&D expenditure in Västra Götaland. We do this by analysing how the region is doing internationally compared to other European regions. The report also presents how the business R&D expenditure in Sweden, especially in the metropolitan counties, develops over time. The report is published every second year.

### Economic Outlook

Published quarterly, Economic Outlook provides a summarised view of the economic tendency in the Gothenburg region in comparison to other Swedish metropolitan regions. The report presents many up-to-date performance indicators for the business environment, including current developments in the labour market.

### Insights

We know Gothenburg is the best place to live in, to work in and to accelerate your business in. If you need the facts to support our word, check out Insights, which is loaded with all the Gothenburg facts you will need. From hard facts to true stories, from deep industry analysis to the latest news.

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### Explore Gothenburg

Need more facts and data? Explore Gothenburg is our interactive tool designed for investors. It is filled with demographic, labour force and industry data for the Gothenburg region. [www.investingothenburg.com/insights/explore-gothenburg](http://www.investingothenburg.com/insights/explore-gothenburg)

### Retail guide

Retail Guide is an annual publication that presents retail opportunities in Sweden and the Gothenburg region, and provides facts and information about the market, demand and supply.

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