

APRIL 2026

Migration Trends in the EU

Main messages



Europe has recorded one of the largest post-Covid immigration increases

The migrant stock increased by 11 million people (+13%) between 2020–24, outpacing growth in Asia and North America.

Annual inflows to the EU-27 reached exceptionally high levels: ~6.2 million in 2022–24, 2.5 million more than the 2013–19 annual average.



Immigration is supporting economic growth and cushioning the demographic decline of native populations

The increase in the foreign-born working-age population has more than offset the native decline, accounting for 40% of the average GDP growth in the EU between 2022–25. Without immigration, the labour force would have fallen in almost all EU countries, being most critical in Spain, Portugal, Germany, and Austria.

Labour market participation among foreigners has also risen steadily, surpassing native levels in most countries and explaining 67% of total employment growth in the EU.

This migrant-led contribution is particularly strong in Germany and Portugal, while employment growth in France and Italy remains driven by natives. Spain is broadly in line with the EU average.



The surge has been broad-based but highly concentrated in a few key countries

Spain (driven by LatAm) and Germany (by Ukraine) alone account for 50% of the EU's rise in inflows in 2022–24.

Portugal and the Netherlands also posted strong inflows, while Italy and France recorded more modest gains.



Working-age immigrants are younger than natives, but their age profile is gradually shifting upwards. Their educational attainment is also improving, though unevenly across countries

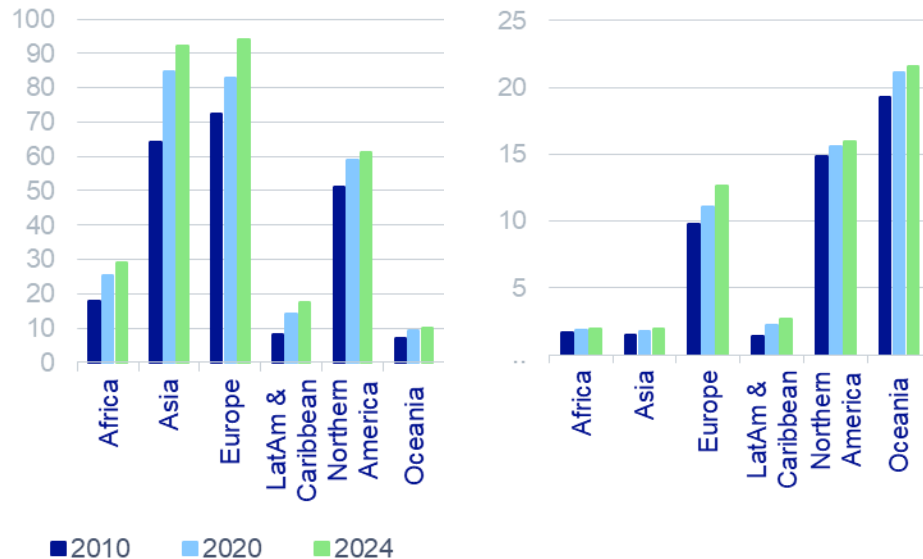
In the EU-27, 47% of foreigners are aged 25–49 vs. 30% of natives. France and Germany have the oldest foreign-born populations among major economies, while Spain remains at the opposite end.

The share of highly educated foreign workers now exceeds 30%, with countries such as Ireland, the Netherlands and Portugal leading the gains among non-EU workers. Progress has been more limited in large economies such as Spain and Italy.

Since Covid, Europe has registered one of the strongest increases in immigration

INTERNATIONAL MIGRANT STOCK

(MILLIONS -FIRST GRAPH-; % OF POPULATION OF EACH REGION - SECOND GRAPH-)



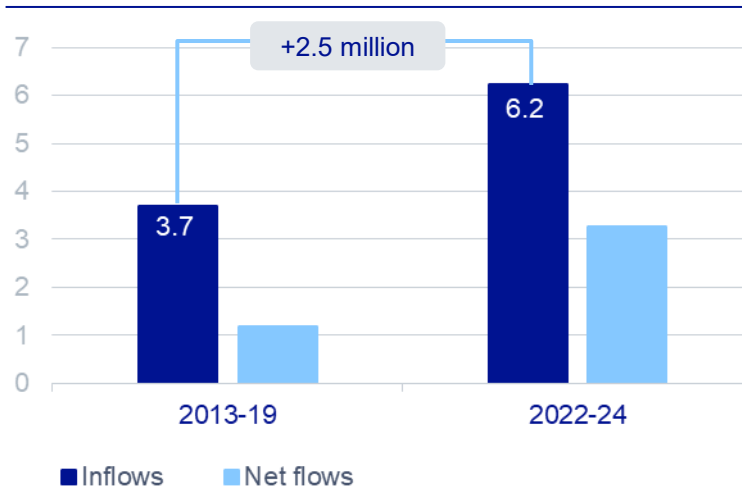
- According to UNDESA data, **between 2020 and 2024 the migrant stock residing in Europe has increased by 11 million people, a cumulative rise of 13%, compared with 9% in Asia and 4% in North America.**
- Africa and Latin America have gained importance as regions of origin for immigrants to Europe, accounting for 11% and 7% of the total foreign population, respectively.
- However, other European countries (48%), including Ukraine, and Asia (21%) remain the most significant contributors.

A migrant is defined as any person who has changed their country of residence, regardless of the reason for doing so.
Africa and Latin America show higher relative growth than Europe between 2020-24 due to significant migration flows within the continent itself.
Source: BBVA based on UNDESA.

Spain and Germany alone explain half of the rise in inflows observed across the EU in recent years

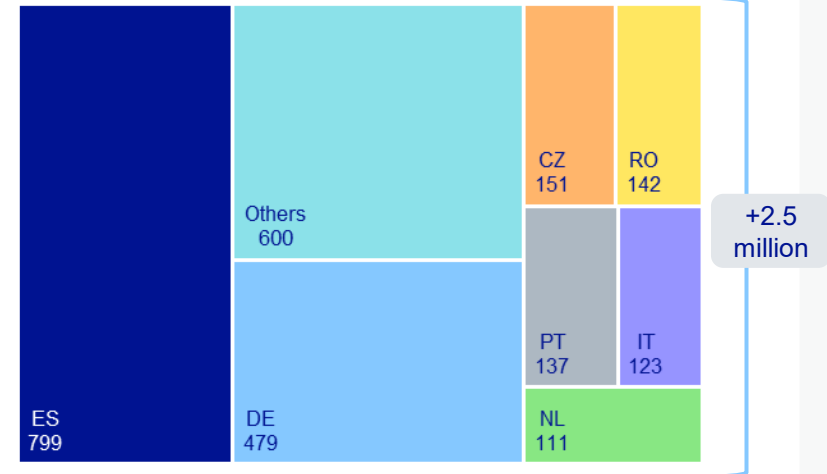
Portugal and the Netherlands also stand out, even when inflows are adjusted by their population size. Much more tepid increases are recorded in other big countries such as France and Italy.

MIGRATION FLOWS TO EU-27
(MILLIONS; ANNUAL AVERAGE OF EACH PERIOD)



Portugal is the only country for which data is not available for 2024. To estimate the EU-27 figure for that year in terms of net flows, we assume that Portugal replicates its 2023 performance. For inflows, Eurostat provides the EU-27 figure for 2024. Source: BBVA Research based on Eurostat.

CONTRIBUTIONS TO THE INCREASE IN MIGRATION INFLOWS TO EU-27
(THOUSANDS; 2022-24 AVG. MINUS 2013-19 AVG.)

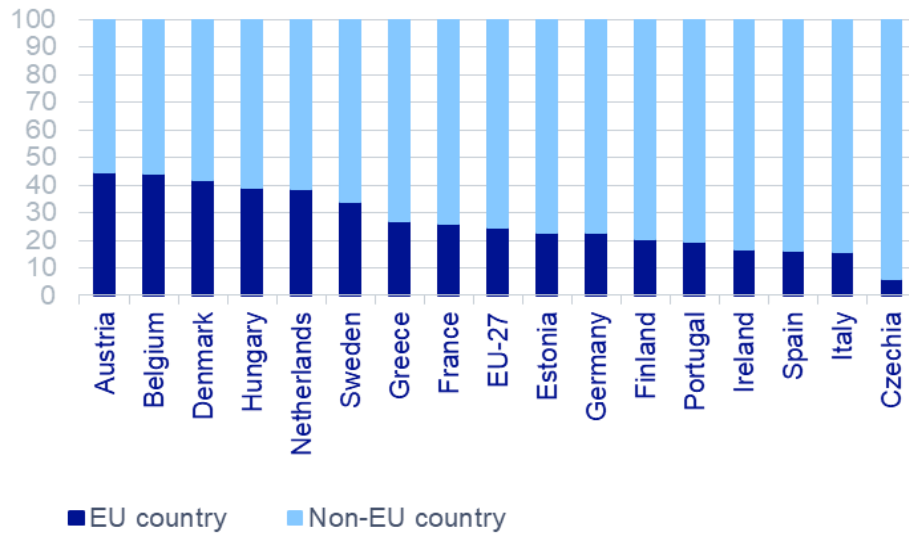


Recent figures for Czechia and Romania -both with very low shares of foreign population- reflect, respectively, inflows of people fleeing the war in Ukraine and a recovery of Romanians returning to their country after sharp outflows observed in the pre-pandemic period.

Immigration from non-EU countries predominates, although with significant differences across nations

DISTRIBUTION OF IMMIGRANTS (INFLOWS) BY COUNTRY OF PREVIOUS RESIDENCE

(% OF TOTAL IMMIGRANT FLOWS, 2022-24 AVERAGE)



- In some of the most dynamic recipient countries, such as Spain, Portugal, and Germany, non-EU arrivals account for over 75% of total entries.
- Only in some Central European countries, flows from neighboring EU states carry a significant weight.
- For instance, Germany is the top destination for Austrian emigrants; France for Belgium; and Poland is the third-largest source for the Netherlands.

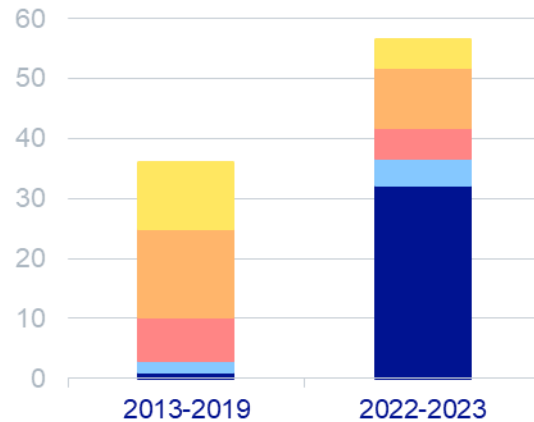
Sweden does not include refugees from Ukraine who benefit from temporary protection in their population and migration statistics.

Source: BBVA based on Eurostat.

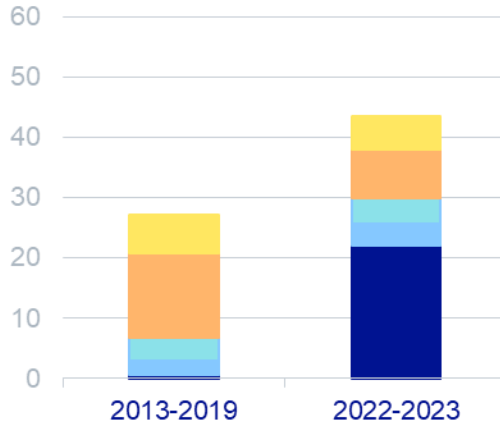
Ukraine has been a key driver of flows toward Central European countries...

INFLOWS OF FOREIGN POPULATION BY CITIZENSHIP (% OF TOTAL, AVERAGE OF EACH PERIOD)

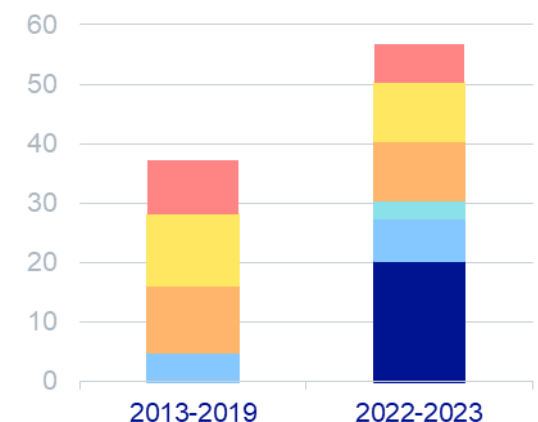
GERMANY



NETHERLANDS



AUSTRIA



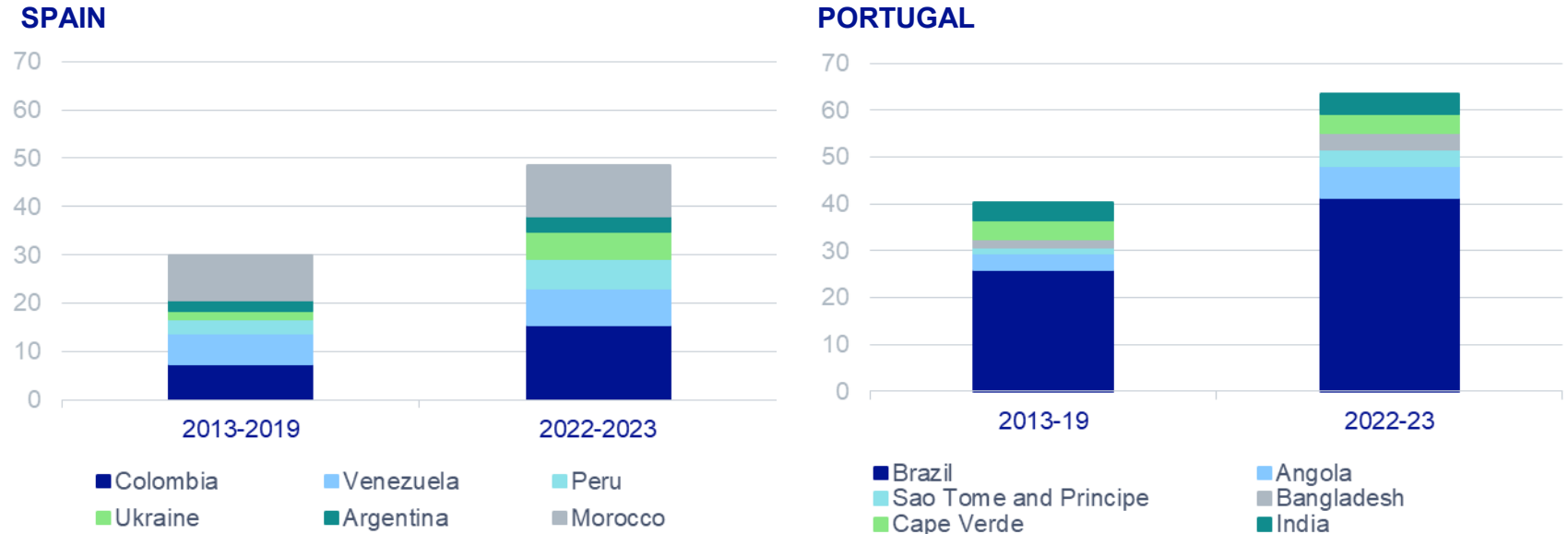
■ Ukraine ■ Türkiye ■ Syria
■ Romania ■ Poland

■ Ukraine ■ Türkiye ■ Romania
■ Poland ■ Syria

■ Ukraine ■ Syria ■ Türkiye
■ Germany ■ Romania ■ Hungary

...while LatAm explains a large share of the rise in Spain and Portugal

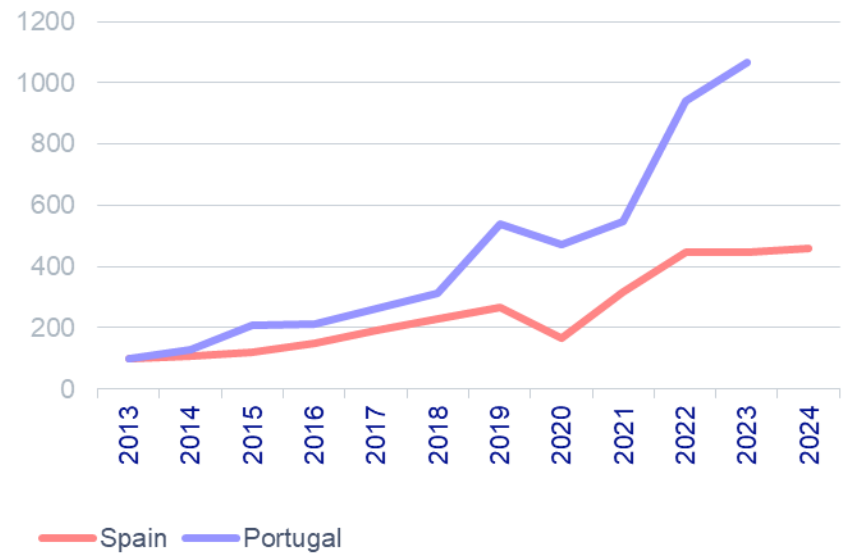
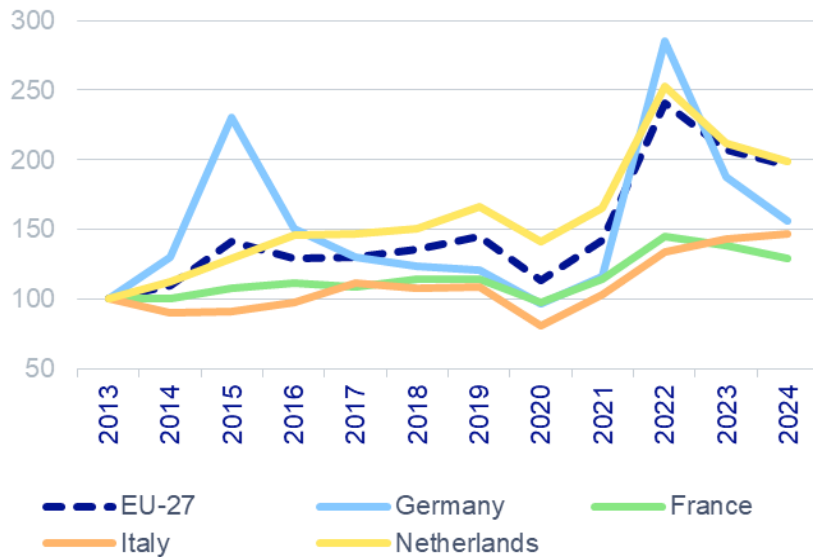
INFLOWS OF FOREIGN POPULATION BY CITIZENSHIP (% OF TOTAL, AVERAGE OF EACH PERIOD)



Source: BBVA based on OECD.

Where Ukraine was crucial, such as in Germany, inflows are starting to slow, unlike in Spain and Portugal

MIGRATION INFLOWS (2013= BASE 100)

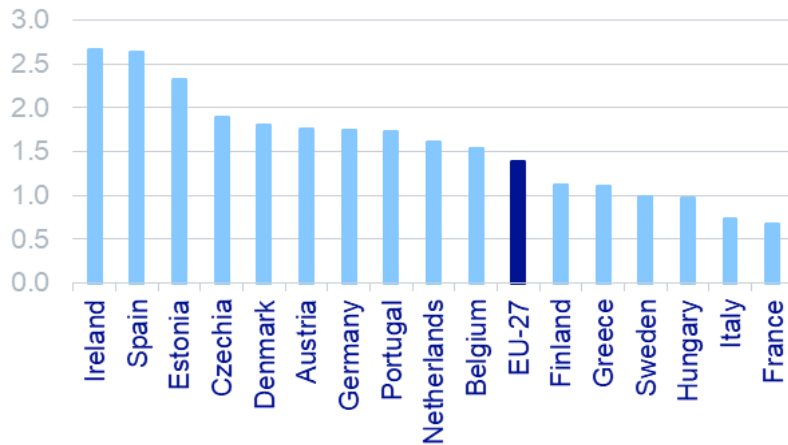


Portugal is the only country for which data of inflows is not available for 2024.
Source: BBVA based on Eurostat.

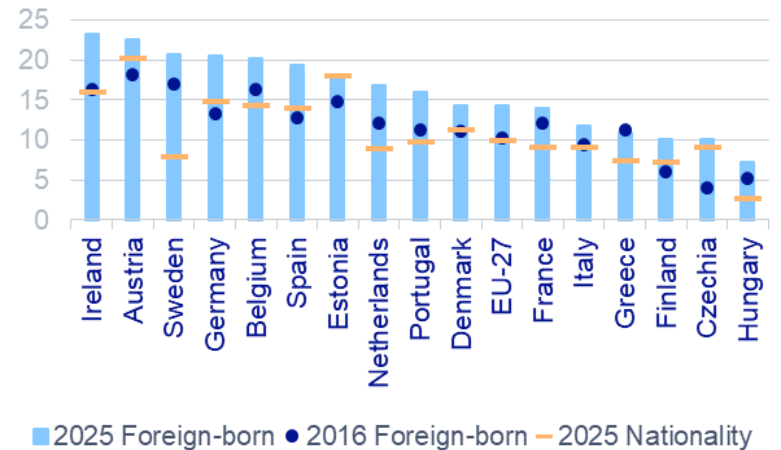
As a result of recent immigration *boom*, foreign population has increased its weight in many countries well above 15%...

Beyond Germany and Spain, smaller countries such as the Netherlands, Portugal and Austria have also seen some of the strongest growth in their foreign-born populations over the past decade.

INFLOWS OF FOREIGN POPULATION (% OF TOTAL POPULATION, 2022-24 AVERAGE)



FOREIGN POPULATION ON TOTAL POPULATION (%)



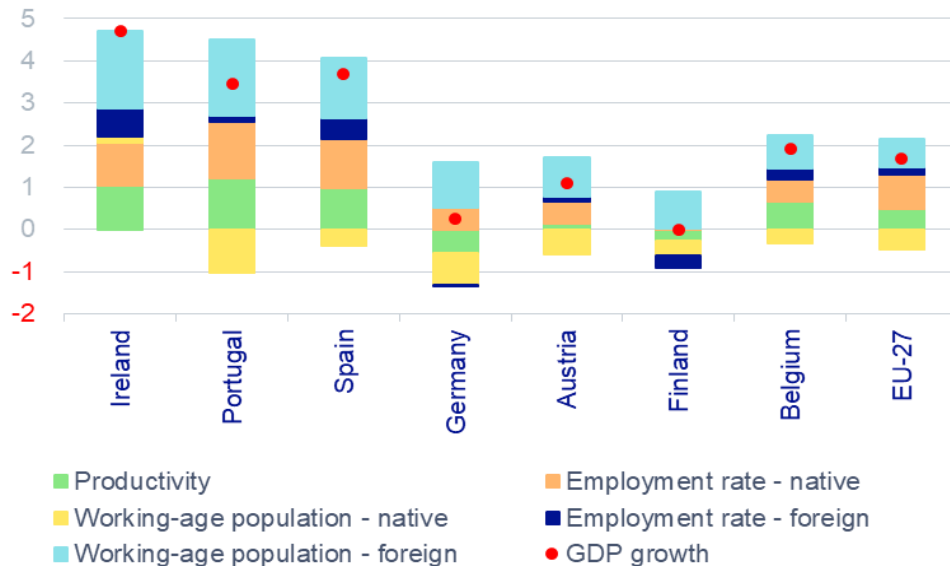
Portugal is the only country for which data of inflows is not available for 2024. We assume that it replicates the performance of 2023.

Source: BBVA Research based on Eurostat.

... helping to expand labour supply and support economic growth since 2022

CONTRIBUTIONS TO ANNUAL GDP GROWTH

COUNTRIES WITH A FOREIGN-BORN CONTRIBUTION ABOVE THE EU AVERAGE (2022-2025; AVERAGE, PP., %)



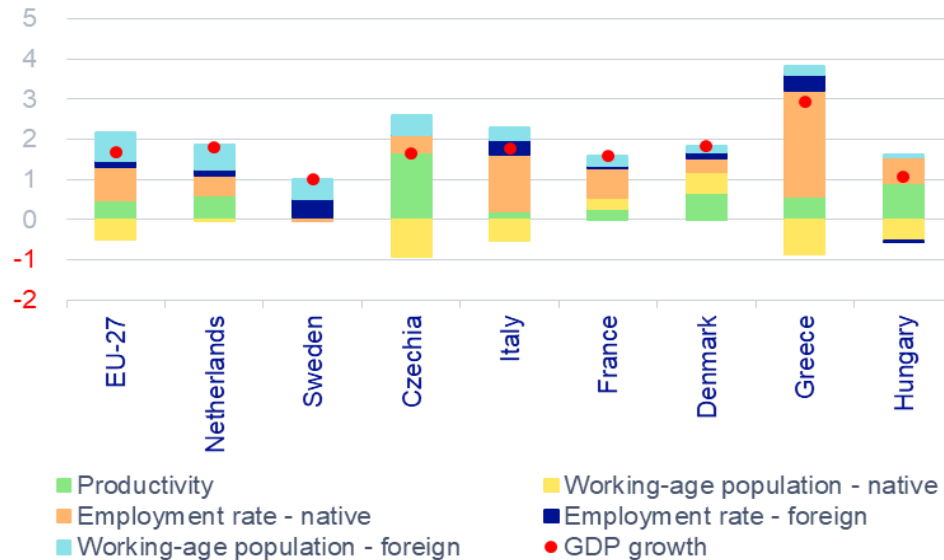
Labour productivity is defined as the ratio of GDP to total employment.
Source: BBVA based on Eurostat. [See annex for more information](#)

- On average across the EU, the increase in the foreign-born working-age population has more than offset the decline in the native population, accounting for 40% of the average GDP growth between 2022-25.
- Ireland, Spain and Portugal stand out for the strong contribution of foreigners to recent economic growth.
- Similarly, Germany's economic performance would have deteriorated further without the buffer provided by immigration.
- This is also critical for Austria and Finland, and—to a lesser extent—for Belgium.

... helping to expand labour supply and support economic growth since 2022

CONTRIBUTIONS TO ANNUAL GDP GROWTH

COUNTRIES WITH A FOREIGN-BORN CONTRIBUTION BELOW THE EU AVERAGE (2022-2025; AVERAGE, PP., %)



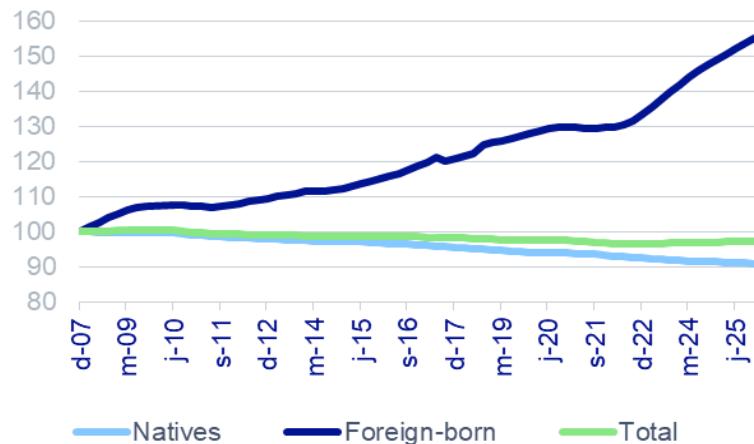
- By contrast, in France and Italy, the role of the foreign-born population is much more limited, and economic growth has relied primarily on higher employment among natives.
- Denmark and the Netherlands exhibit a more balanced growth profile, considering the respective contributions of natives and foreigners to the labour market and the working-age population.

The influx of immigrants has continued to cushion the structural decline of the native working-age population

Over the last decade, while the native working-age population has contracted by 6.4% across the EU, the total population has *only* decreased by 1.6% supported by entries of foreign-born population.

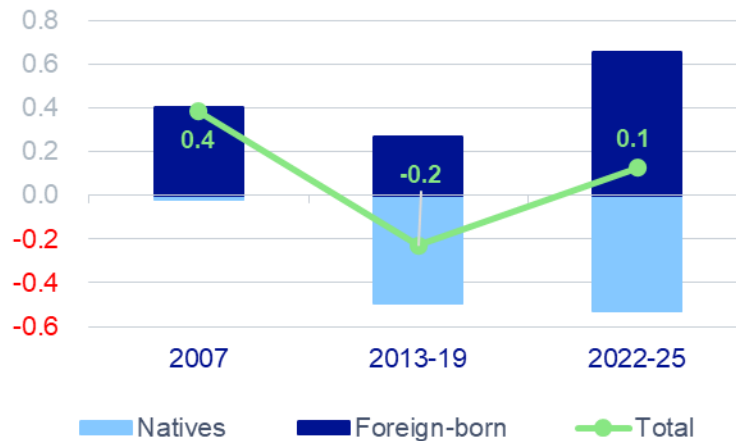
EU-27: WORKING-AGE POPULATION (15-64Y) BY COUNTRY OF BIRTH

(BASE 100= 2007)



EU-27: CONTRIBUTIONS TO WORKING AGE POPULATION GROWTH BY COUNTRY OF BIRTH

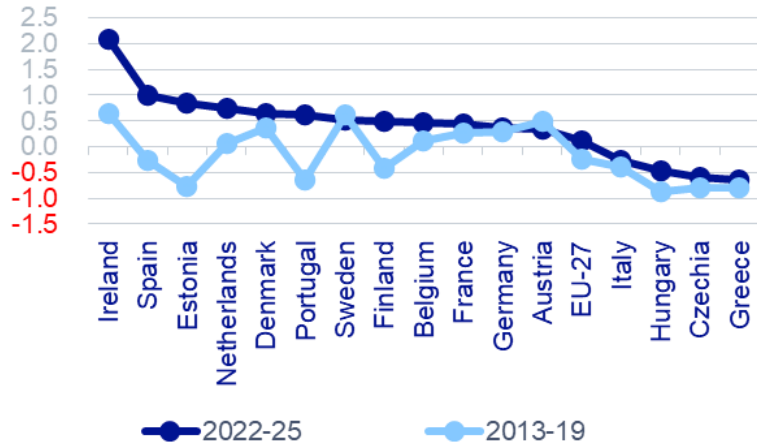
(%, ANNUAL CHANGE, AVERAGE OF EACH PERIOD)



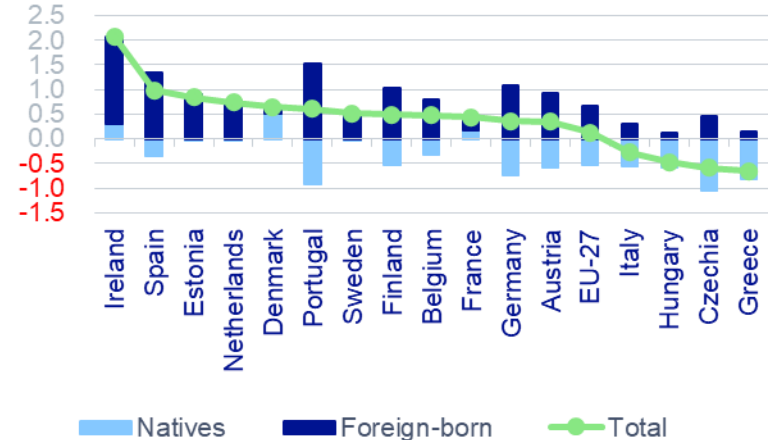
Without immigration, the labour force would have fallen in all EU countries except for Ireland, France and Denmark

Its contribution has been particularly relevant in countries with the most dynamic labour forces such as Ireland, Spain, Portugal and the Netherlands, as well as in Germany and Austria, where native populations are in sharp decline. Italy is the exception among the major economies.

WORKING-AGE POPULATION (15-64Y)
(ANNUAL CHANGE, %; AVERAGE OF EACH PERIOD)



WORKING-AGE POPULATION (15-64Y) BY COUNTRY OF BIRTH
(ANNUAL CHANGE, %; AVERAGE 2022-25)

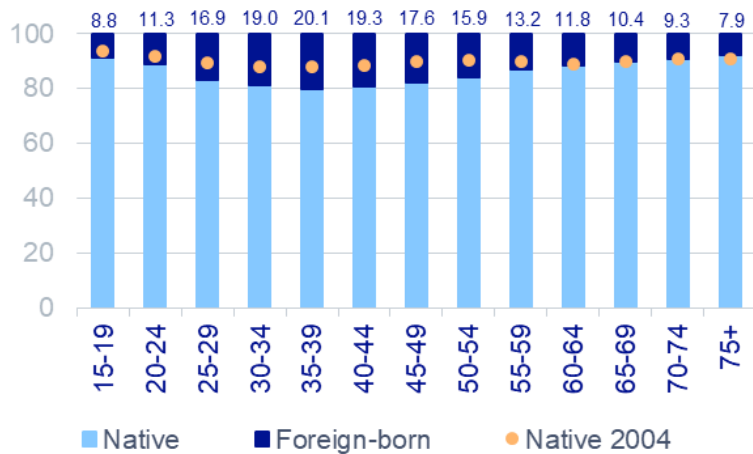


Foreigners are also younger, which is crucial for generational replacement of native population

In the EU-27, 47% of foreign nationals are aged 25–49, compared with 30% of the native-born. However, the foreign-born population is also ageing: first-generation cohorts are getting older in destination countries, and new arrivals tend to be somewhat older as well.

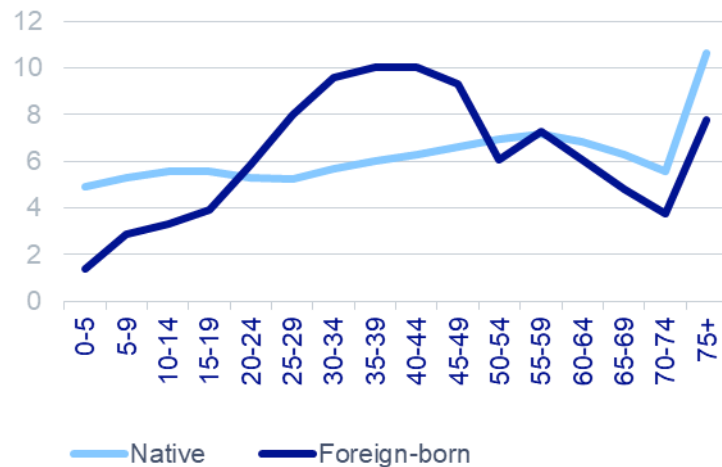
EU-27: AGE GROUP DISTRIBUTION BY COUNTRY OF BIRTH

(% OF TOTAL POPULATION IN EACH AGE GROUP, 2024)



EU-27: DISTRIBUTION OF POPULATION BY AGE

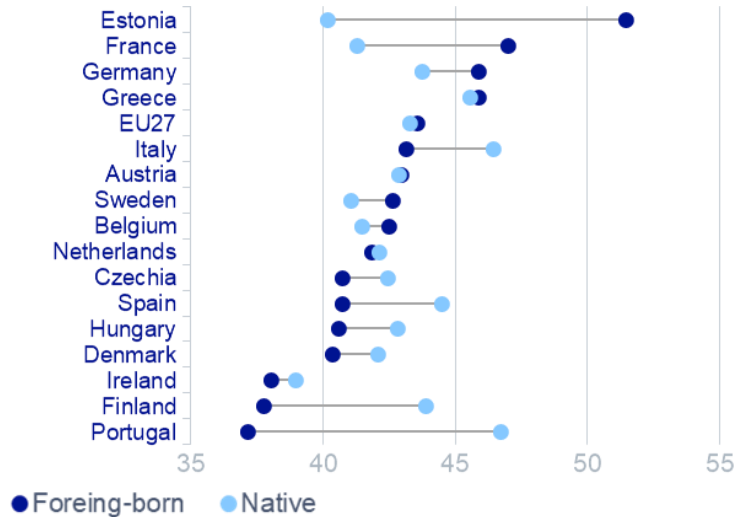
(% OF TOTAL NATIVE AND FOREIGN-BORN POPULATION, 2024)



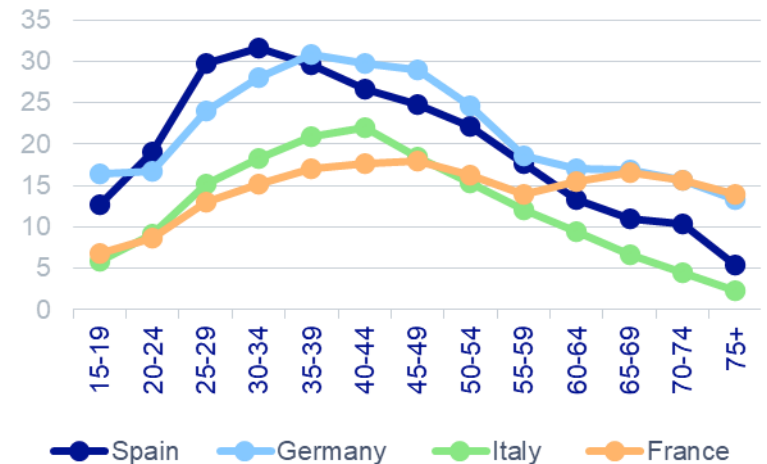
Among major countries, France and Germany rank with the oldest foreign-born populations; Spain is at the other end

In Spain, foreign nationals represent 28% of the population aged 25–49, compared with 16% in France. In Germany, the share is similar to that in Spain but it shows clear signs of decline among younger cohorts. In fact, in both continental countries the average age of the foreign-born population is higher than that of natives.

AVERAGE AGE OF FOREIGN-BORN AND NATIVE POPULATION (YEARS, 2024)



WEIGHT OF FOREIGN-BORN POPULATION IN EACH AGE GROUP (% OF TOTAL POPULATION, 2024)

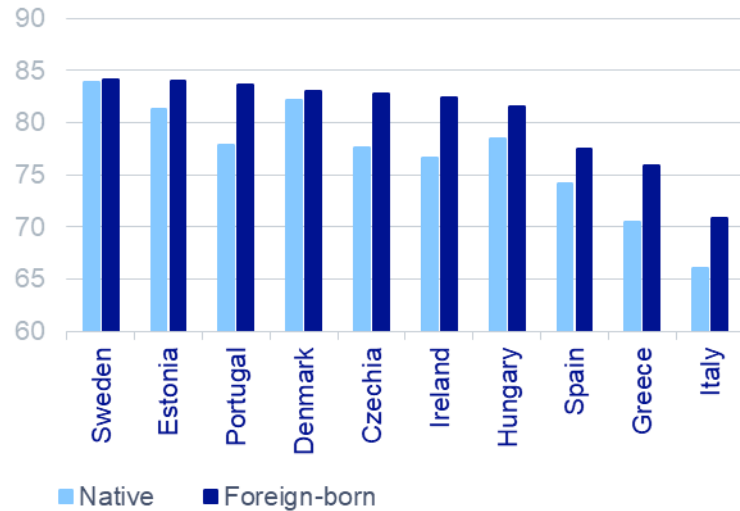


Data includes all population. The higher share of native population among 0-15 ages helps to explain the same average age for natives and foreigners in the case of the EU-27.
Source: BBVA Research based on Eurostat.

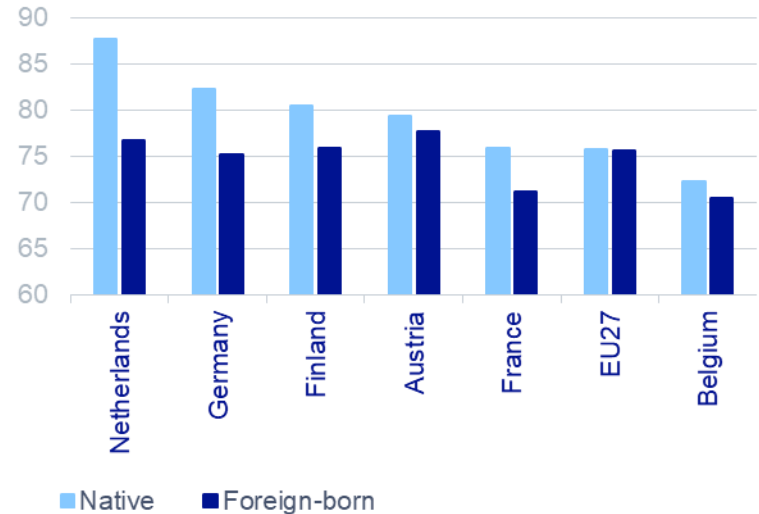
Labour market participation among foreigners has also risen steadily, surpassing the levels of natives in most countries...

In Mediterranean countries, activity rates among foreigners tend to exceed those of the native population.

ACTIVE POPULATION RATES (15-64Y) BY COUNTRY OF BIRTH (FOREIGN-BORN RATES HIGHER THAN NATIVE RATES; %, 2025)

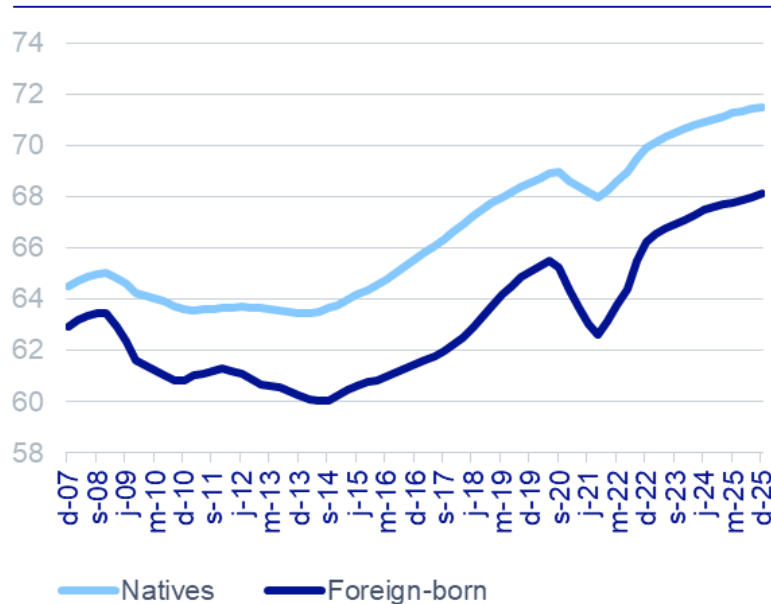


ACTIVE POPULATION RATES (15-64Y) BY COUNTRY OF BIRTH (FOREIGN-BORN RATES LOWER THAN NATIVE RATES; %, 2025)

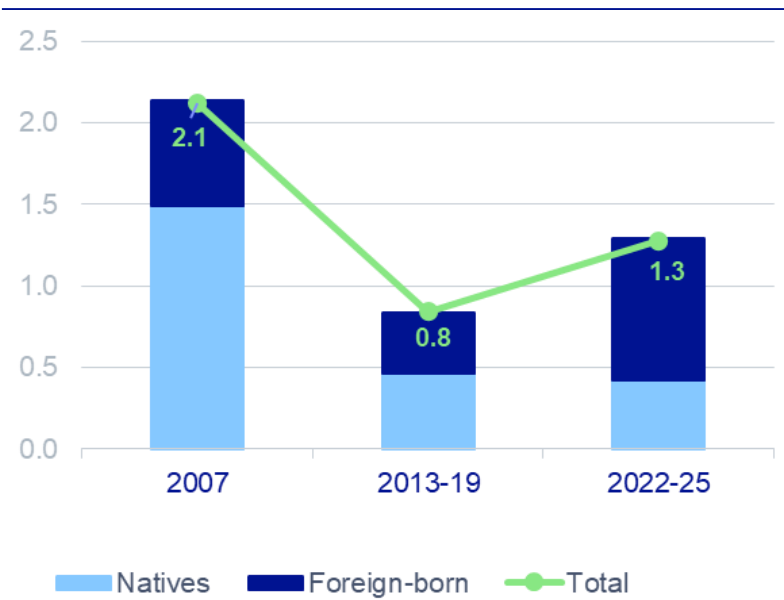


....and accounting for 67% of total employment growth in the EU

EU-27: EMPLOYMENT RATES (15-64Y) BY COUNTRY OF BIRTH (%)



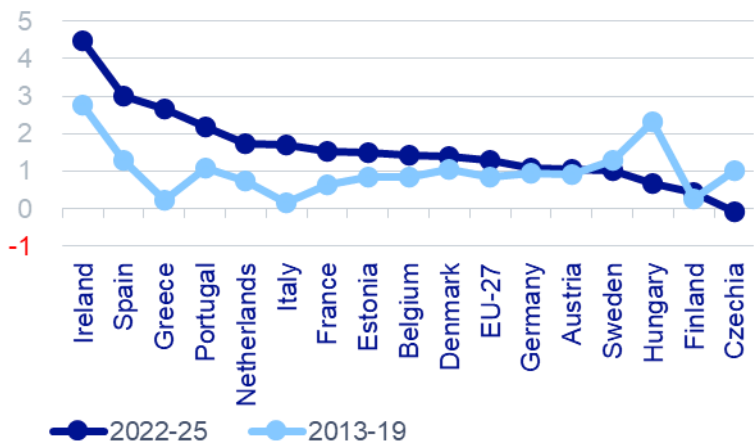
EU-27: CONTRIBUTIONS TO EMPLOYMENT GROWTH BY COUNTRY OF BIRTH (% ANNUAL CHANGE, AVERAGE OF EACH PERIOD)



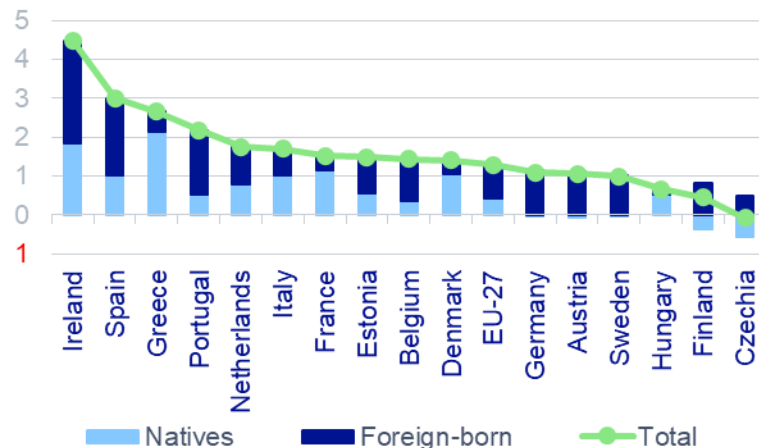
Again, the picture differs across countries; in Germany, Austria, or Portugal, immigrants are even more relevant to job creation

By contrast, employment growth in France, Denmark and Italy is primarily driven by natives. Spain remains closely aligned with the EU average.

EMPLOYMENT (15-64Y)
(ANNUAL CHANGE, %; AVERAGE OF EACH PERIOD)

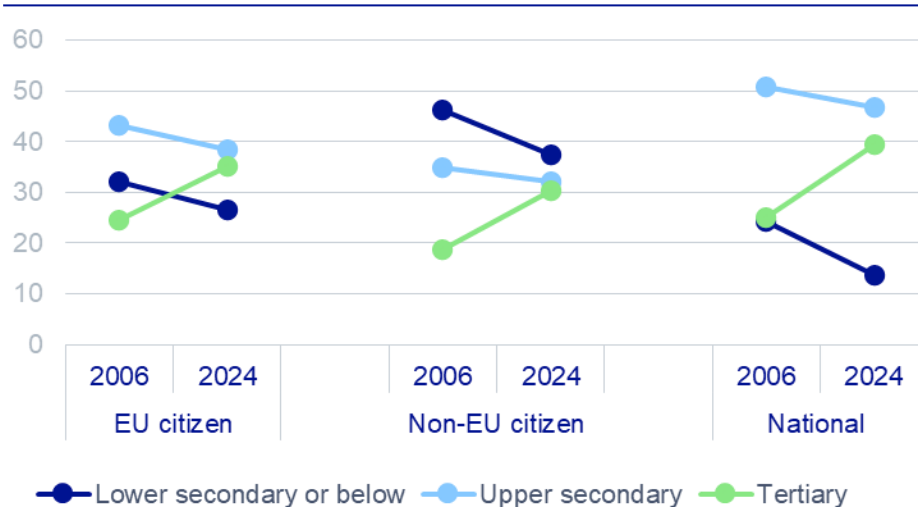


EMPLOYMENT (15-64Y) BY COUNTRY OF BIRTH
(ANNUAL CHANGE, %; AVERAGE 2022-25)



While a third of immigrant workers still have low education levels, the share of those with tertiary qualifications has risen steadily

EU-27: EDUCATIONAL ATTAINMENT OF EMPLOYEES BY CITIZENSHIP (% OF EACH GROUP)



- The share of the foreign employees with low educational attainment has declined from 41% to 33% between 2006 and 2024 –driven by non-EU immigrants (from 46% to 37%)–, while those with tertiary education now account for 32%, 11pp more than two decades ago.

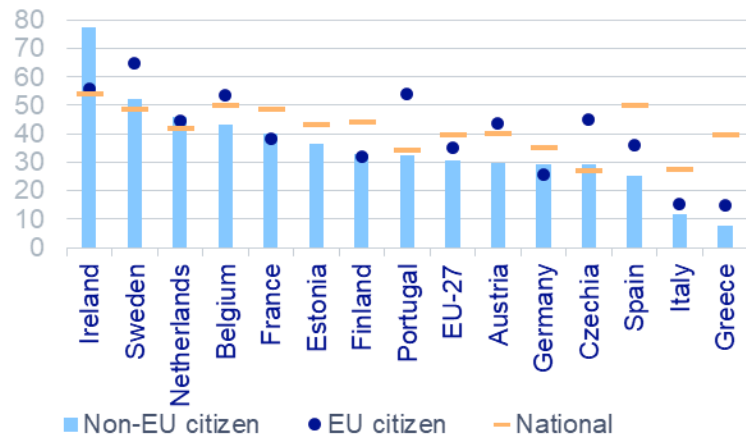
Foreign population includes both EU and non-EU countries immigrants. In 2024, non-EU countries accounted for 63% of total foreign employment in the EU.

Source: BBVA Research based on Eurostat.

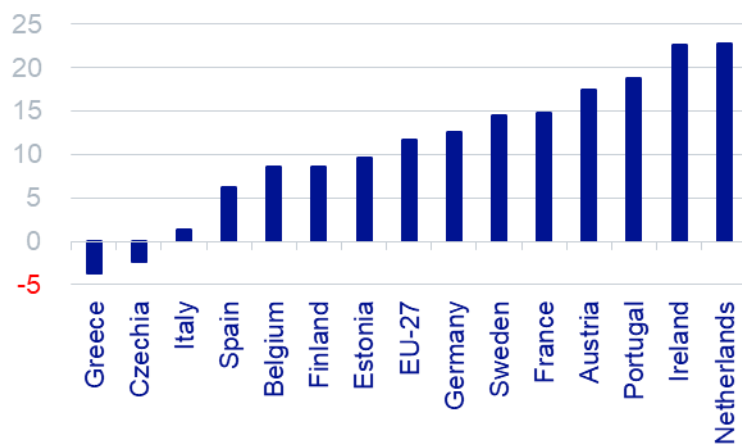
Countries of origin and productive specialization emerge as main factors to explain differences in education level across nations

The Netherlands and Ireland –along with Portugal– have recorded the largest educational gains among non-EU workers in recent years. In both countries (as well as Sweden), the share of non-EU workers with tertiary education is even higher than among nationals. Progress has been more muted in large economies such as Spain and Italy, where the gap in tertiary-educated employment between nationals and non-EU workers remains particularly wide.

EMPLOYEES WITH TERTIARY EDUCATION BY CITIZENSHIP (2024, % OF EACH GROUP)



CHANGE IN THE SHARE OF NON-EU EMPLOYEES WITH TERTIARY EDUCATION (2006-24, % OF EACH GROUP)



Foreign population includes both EU and non-EU countries immigrants.
Source: BBVA Research based on Eurostat.

Annex

Contribution of foreigners to GDP growth

We start from the accounting identity:

$$GDP_t = \underbrace{\frac{GDP_t}{E_t}}_{\text{Productivity}} \underbrace{\frac{E_t}{P_{15-64,t}}}_{\text{ER}} P_{15-64,t}. \quad (1)$$

Employment rate growth

Define

$$g_{w,t} = \frac{w_t - w_{t-1}}{w_{t-1}}. \quad (2)$$

The growth rate of the employment rate can then be written as

$$g_{ER,t} = \underbrace{\frac{1}{1 + g_{P_{15-64,t}}} \left[\frac{E_{t-1}^f}{E_{t-1}} g_{E^f,t} - \frac{P_{15-64,t-1}^f}{P_{15-64,t-1}} g_{P_{15-64,t}^f} \right]}_{\text{Foreign contribution}} + \underbrace{\frac{1}{1 + g_{P_{15-64,t}}} \left[\frac{E_{t-1}^n}{E_{t-1}} g_{E^n,t} - \frac{P_{15-64,t-1}^n}{P_{15-64,t-1}} g_{P_{15-64,t}^n} \right]}_{\text{Native contribution}}. \quad (3)$$

Population (15–64) growth

The growth rate of the working-age population is

$$g_{P_{15-64,t}} = \underbrace{\frac{P_{15-64,t-1}^f}{P_{15-64,t-1}} g_{P_{15-64,t}^f}}_{\text{Foreign contribution}} + \underbrace{\frac{P_{15-64,t-1}^n}{P_{15-64,t-1}} g_{P_{15-64,t}^n}}_{\text{Native contribution}}. \quad (4)$$

Log approximation

The growth rates can be approximated by log differences:

$$g_{ER,t} \approx \ln\left(\frac{ER_t}{ER_{t-1}}\right), \quad (5)$$

$$g_{P_{15-64,t}} \approx \ln\left(\frac{P_{15-64,t}}{P_{15-64,t-1}}\right). \quad (6)$$

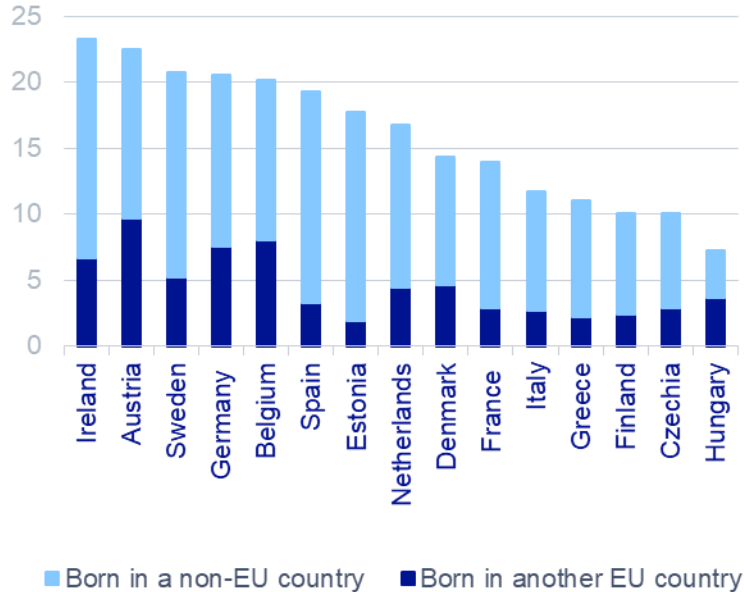
This decomposition follows the accounting framework developed by the Bank of Spain (2025) for GDP per capita.

The employment rate (ER) is defined as total employment (E) divided by the population (P) aged 15–64. Both variables can be decomposed by origin, where superscript f denotes foreign-born individuals and n denotes native-born individuals.

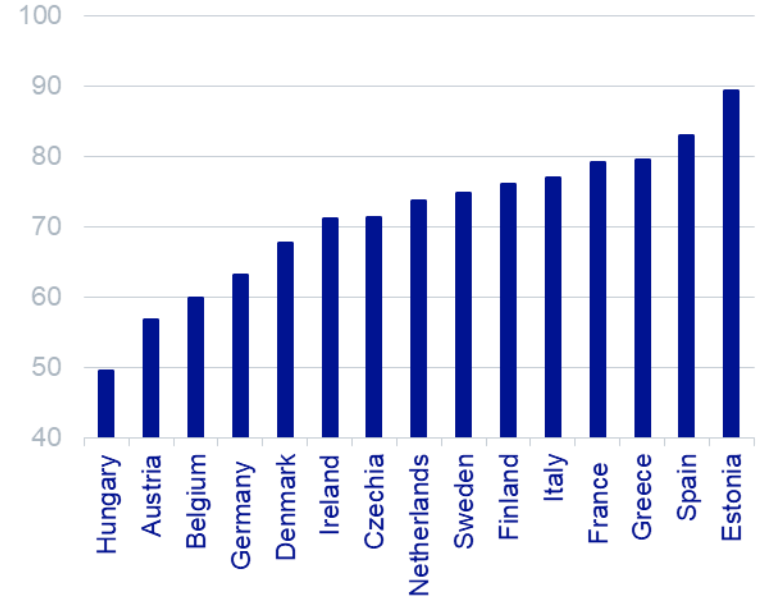
Non-national population by group of country of birth

FOREIGN-BORN POPULATION

(% OF TOTAL POPULATION, 2025)



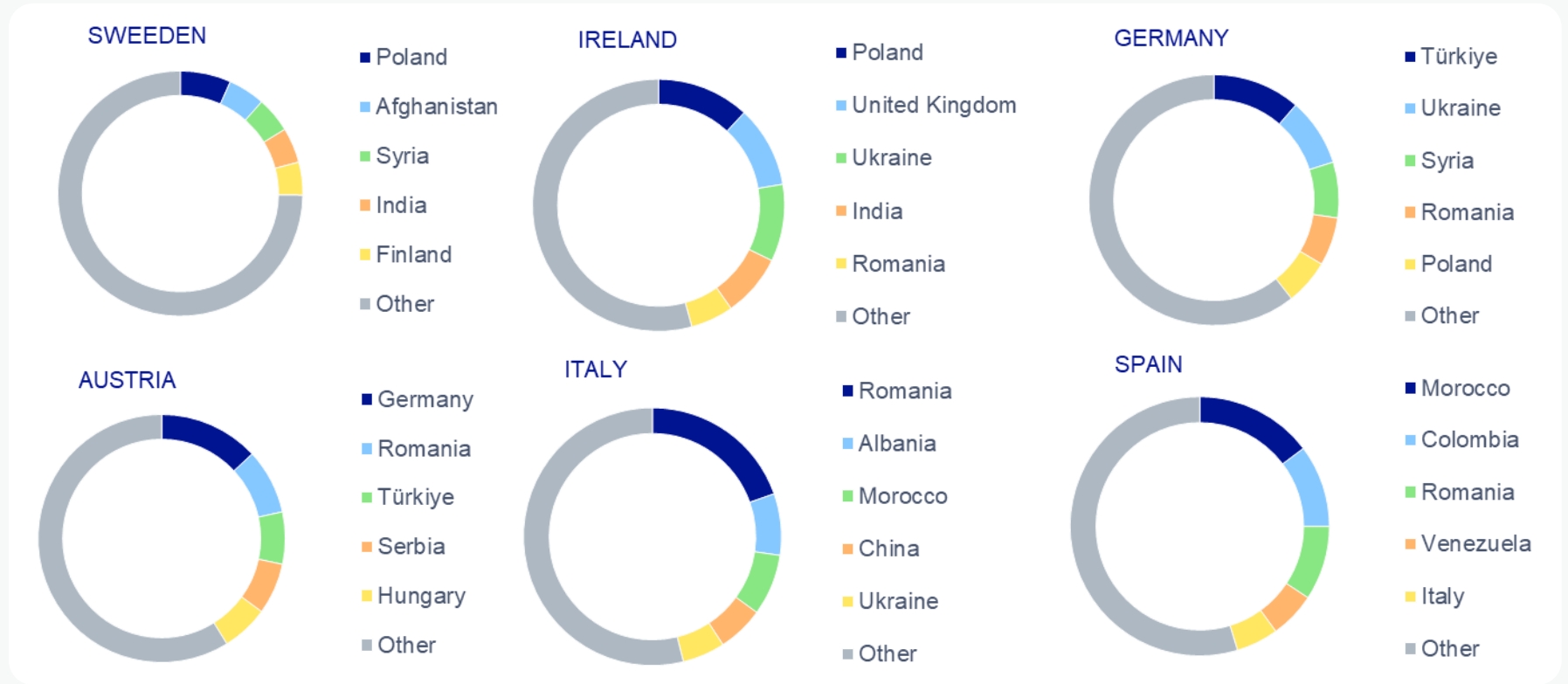
SHARE OF NON-EU POPULATION ON FOREIGN-BORN POPULATION (%) (2025)



Not available data for Portugal.

Source: BBVA Research based on Eurostat.

Main countries of citizenship (% of total foreign population) 2025

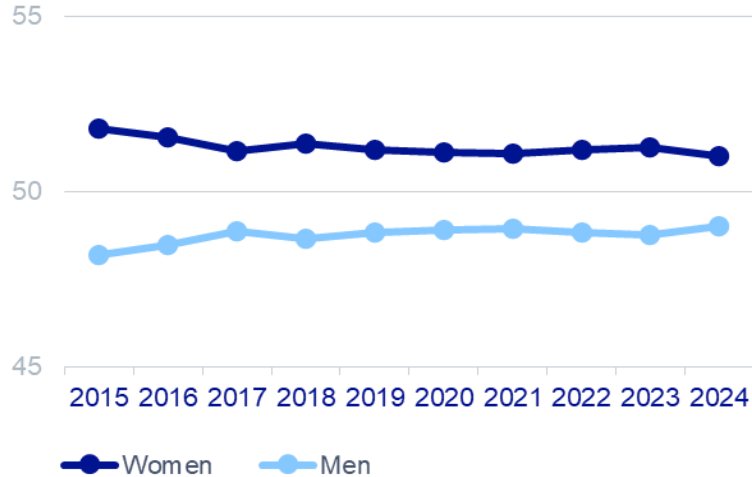


Source: BBVA Research based on Eurostat.

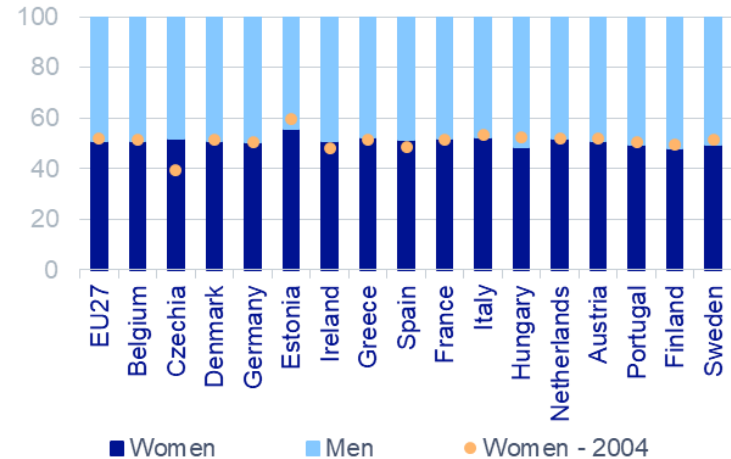
Gender composition of foreigners has remained relatively stable. Slight majority of women in Italy, France and Spain

The most notable shift is observed in Spain. Since 2012, women have accounted for a larger share of the immigrant population than men.

EU-27: FOREIGN-BORN POPULATION BY SEX
(% OF TOTAL)



WOMEN SHARE IN FOREIGN-BORN POPULATION
(% OF TOTAL POPULATION, 2024)



Source: BBVA Research based on Eurostat.

References

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- OECD (2025). [International Migration Outlook 2025](#)

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