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UK-Mauritius Investor Sentiment Report 2026

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Trade Supplement:
UK Buyers Sentiment towards the Mauritian Apparel Sector

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1. Report Overview

1.1 Introduction

The UK-Mauritius Investor Sentiment Report 2026 (Investor Sentiment Report), funded by UK International Development, seeks to build an evidence-based understanding of how UK investors perceive Mauritius as an investment destination. Developed by Invest Africa, the report is designed to provide a timely assessment of investor appetite and strategic interest in the Republic of Mauritius (Mauritius) and inform the UK Government and the Government of Mauritius' wider economic development work.

The research draws on a mixed methods approach to explore perceptions of Mauritius' investment climate, including views on the macroeconomic environment, regulatory landscape, sectoral opportunities, and sentiment towards Mauritius' investment promotion. Situating these findings within the wider investment landscape, the report also considers the emerging priorities shaping investor outlooks, confidence, and decision-making across global markets.

The report is intended to assess the current sentiment of UK investors towards Mauritius to support efforts to deepen UK-Mauritius economic engagement, helping to identify areas where policy refinement, market communication, or investment promotion could strengthen the bilateral investment and trade corridor.

The Investor Sentiment Report is complemented by a demand side analysis of the apparel trade relationship, deep diving into UK apparel buyer appetite and demand for Mauritian products. The research examines UK buyer perceptions of Mauritius as a sourcing destination and trade partner. The findings aim to support Mauritian stakeholders in strengthening their UK market access, aligning production with buyer expectations, and identifying targeted interventions to enhance UK-Mauritian apparel trade engagement.

1.2 Glossary

For the purposes of this report, the following key terminology applies:

- **Active Investors:** Respondents who are currently investing in Mauritius.
- **Prospective Investors:** Respondents who do not currently invest in Mauritius and remain in the evaluation phase.
- **Net Sentiment Score:** A measure focusing on the balance between positive and negative sentiment responses. Calculated by subtracting the negative mentions from positive mentions.
- **Positive Sentiment:** Calculated as the ratio of positive responses (e.g. "Very Confident" and "Confident") to the total number of respondents.
- **Negative Sentiment:** Calculated as the ratio of negative responses (e.g. "Not at all Confident" and "Not Confident") to the total number of respondents.
- **Gateway to Africa:** Refers to positioning Mauritius as the conduit for driving investment to Africa through the Mauritius International Financial Centre.

2. Executive Summary

Drawing on a mixed-methods approach combining a structured investor sentiment survey with deep-dive interviews, the report finds UK investor sentiment to be broadly positive and, in places, genuinely strong. Confidence in stability, governance, and the Gateway to Africa positioning provides a solid foundation, with conviction strengthening over the medium term. The Gateway to Africa positioning is the strongest single positive metric in the dataset at 81%, while tourism, financial services, and real estate command deep sectoral conviction and fintech, the blue economy, and the green economy represent a strategically important middle tier. Mauritius' competitive advantage is held back less by reputation than by execution, specifically the gap between a well-regarded promotional brand and the clarity, accessibility, and responsiveness of the engagement sitting behind it. Only 37% of investors find investment information clear and slow government responsiveness has tangibly cost Mauritius deals. The opportunity lies in articulating an evidence-led investment case across emerging sectors while improving the speed and clarity of investor engagement, converting existing awareness into active capital commitment.

2.1 Sentiment Snapshot - by the Numbers

Investment Sentiment

- **60%** Positive sentiment for 2026
- **67%** Positive sentiment for 3-5 years time
- **57%** Net sentiment for 2026
- **81%** Positive view of Mauritius as a Gateway to Africa

Sectoral Outlooks

- **90%** ↑ Highest positive sentiment: Tourism sector
- **81%** ↑ #2 Highest positive sentiment: Financial/Pro Svs
- **45%** ↓ #2 Lowest positive sentiment: Agriculture
- **33%** ↓ Lowest positive sentiment: Manufacturing

Investment Drivers

- **91%** ↑ Top importance: governance and transparency
- **90%** ↑ #2 importance: ease of doing business
- **78%** ↓ #2 Lowest importance: IR & policy comms
- **66%** ↓ Lowest importance: ESG & sustainability

Source: Invest Africa Mauritius Investor Sentiment Survey 2026

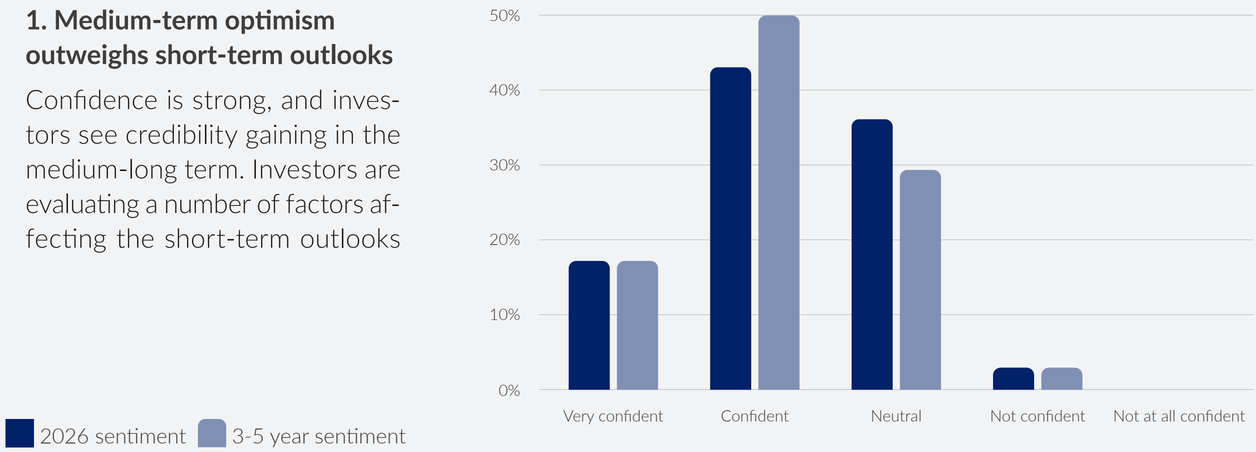
2.2 Strategic Insights

Investor confidence, sectoral performance, and the key drivers shaping capital flows point toward dynamics that demand closer examination. While the headline data reveals an overall positive sentiment, the patterns beneath the surface tell a story around investor engagement. The three graphs showcased below highlight the key findings uncovering strategic insights to inform Mauritius' future investor relations and engagement strategy.

1. Medium-term optimism outweighs short-term outlooks

Confidence is strong, and investors see credibility gaining in the medium-long term. Investors are evaluating a number of factors affecting the short-term outlooks

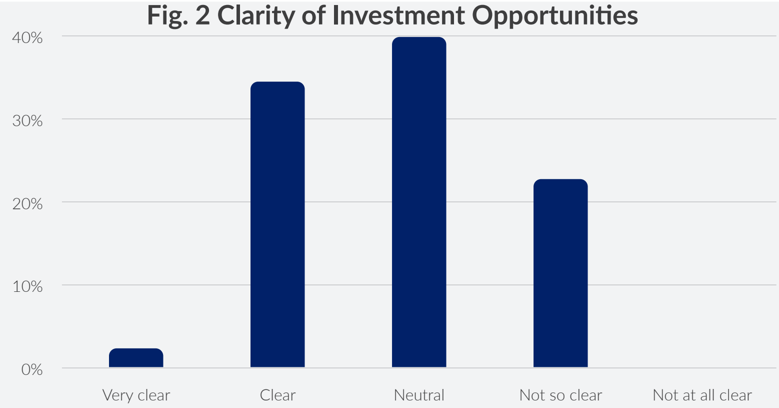
Fig. 1 2026 vs 3-5 Year confidence in Mauritius



2. Promotion is valued but awareness and clarity falls behind

Investors rate promotional efforts well, yet when asked how clear the information is on opportunities there is a meaningful gap in clarity

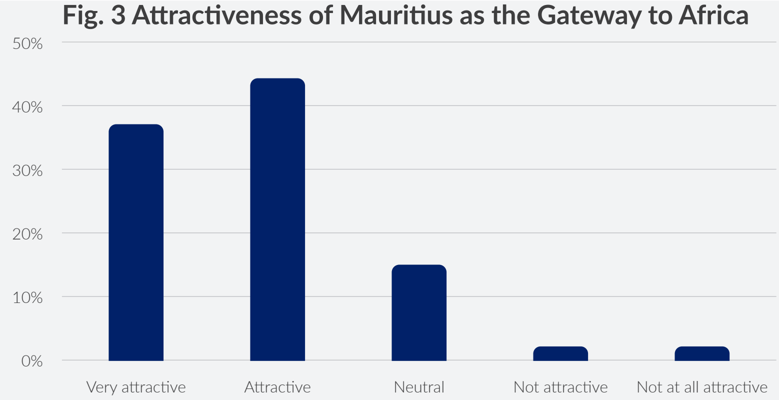
Fig. 2 Clarity of Investment Opportunities



3. Selling the Africa Gateway narrative

81% see Mauritius as an attractive gateway, but key is to expand the gateway narrative

Fig. 3 Attractiveness of Mauritius as the Gateway to Africa



Source: Invest Africa Mauritius Investor Sentiment Survey 2026

3. Trade and Economic Overview

3.1 Snapshot

Mauritius, a small island economy in the Indian Ocean, has undergone significant economic transformation over recent decades, evolving from an agriculture-based system into a diversified, upper-middle-income economy. Today, growth is largely driven by services, particularly financial services and tourism, supported by a stable macroeconomic environment and relatively strong institutions compared to regional peers (World Bank Group, n.d.; AfDB, 2024). Mauritius promotes itself as an international financial centre and investment platform linking Africa, Asia, and the Middle East, strengthened by an open economy and extensive network of trade and investment agreements.

Mauritius' role as a conduit for investment into Africa has been supported by a well-established financial services sector and a legal framework familiar to UK investors. At the same time, the government continues to prioritise economic diversification and sustainable development as part of its longer-term growth strategy (US Dept of Trade, 2025; IMF, 2025). Following the 2024 general elections, the new government has set out a Programme centred on institutional reform and a shift toward a more investment-driven and productivity-led growth model. Key priorities include strengthening macroeconomic fundamentals and developing new areas of growth like the ocean economy and renewable energy. The Programme also places emphasis on digital transformation, which aims to place Mauritius as a technology-enabled "intelligent island", alongside efforts to improve public sector efficiency and international economic engagement (Government of Mauritius, 2025).

The UK and Mauritius have deep historical ties and strong partnerships across a full range of shared strategic interests including economic growth, security, and climate change. Cooperation is being strengthened to address challenges and seize opportunities, with a particular focus on boosting mutual economic growth and trade, reinforcing the international rules-based system, enhancing maritime security, and tackling climate change (UK Government, 2025). Building on the recently signed UK-Mauritius Strategic Partnership Framework, the UK is committed to work together with Mauritius to enhance Mauritius' status as a regional financial hub and investment destination. This report develops comprehensive insights to develop mechanisms for delivering growth for UK-Mauritius investor relations.

4. Research Methods

4.1 Methods

Invest Africa employed a mixed-methods approach to this Investor Sentiment Report, combining an investor sentiment survey with a series of deep-dive investor interviews. This design enabled both statistical rigour and contextual depth, providing a more nuanced view of investor sentiment towards Mauritius.

The Mauritius Investor Sentiment Survey was a structured online questionnaire designed to capture quantitative data across a cross-section of investor profiles. It examined investor confidence, key investment drivers, and sectoral outlooks as well as perceptions of Mauritius' investment promotion.

The deep-dive investor interviews were conducted with a select group of investors to further explore decision-making drivers and market outlooks. These conversations provided qualitative depth to the findings, strengthening the overall analysis with richer, more contextualised insight.

Survey responses were analysed using percentage distributions to identify patterns across sentiment scores, category distributions, and net sentiment indicators. Key findings are presented through visual data charts to illustrate trends and comparisons, supported by written analysis providing greater contextual interpretation. The findings were synthesised to develop directional insights in order to provide strategic recommendations.

4.2 Respondent profile

Fig. 4 Sector Split

Which sector does your business operate in?

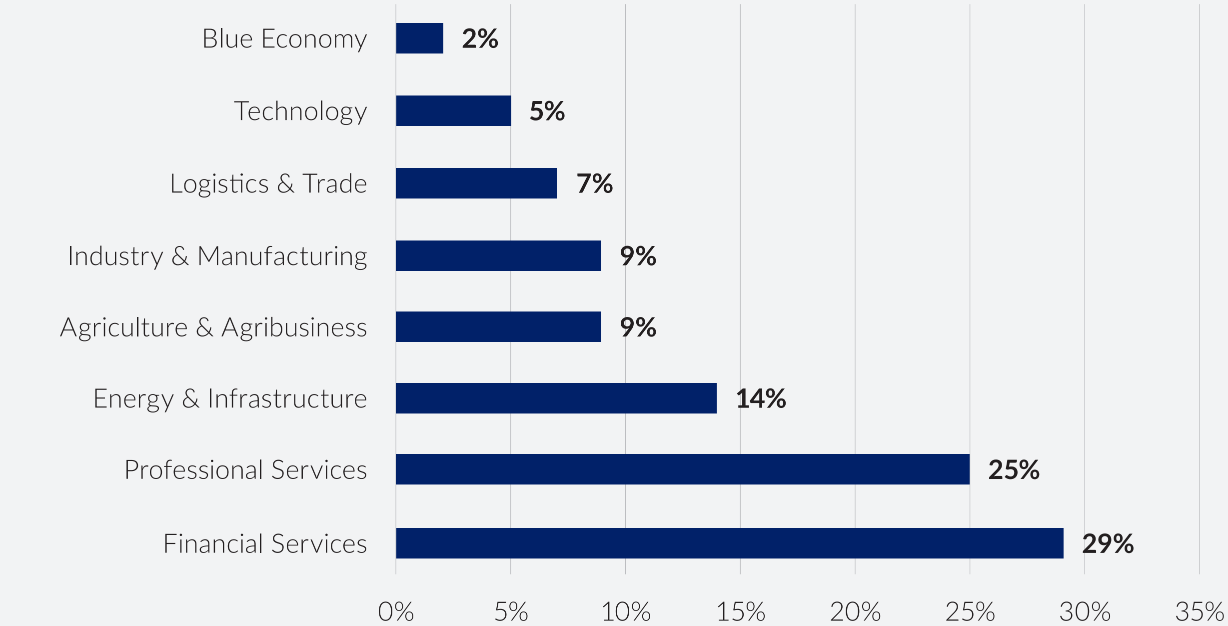


Fig. 5 Investment Status

Do you currently invest in Mauritius?

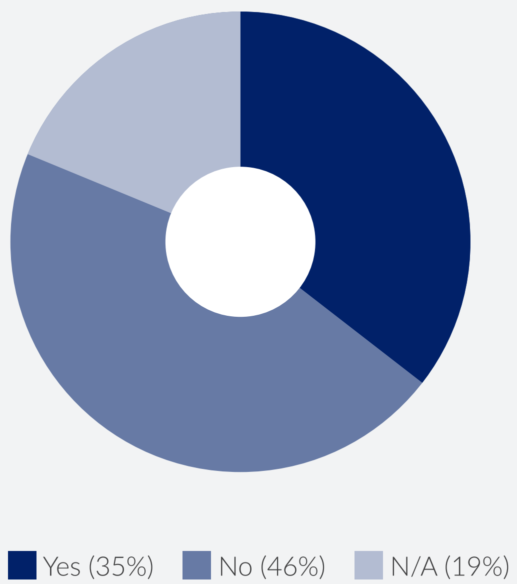
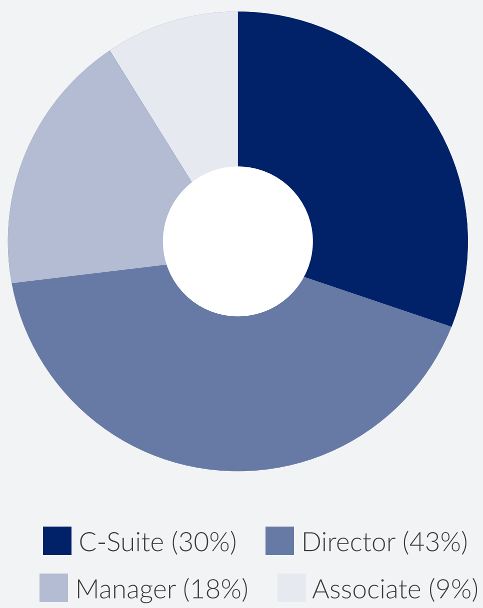


Fig. 6 Seniority level

What is your title?



Source: Invest Africa Mauritius Investor Sentiment Survey 2026

5. Analysis

5.1 Snapshot

As Africa's top-ranking International Financial Centre (GFCI, 2025), Mauritius markets itself a stable, transparent and well-regulated market providing secure access to key African markets. Priding itself on an environment fostering confidence and credibility, our research delves into UK investor perceptions to provide directional insights to inform Mauritius' UK investor engagements.

Participants cite broadly positive confidence levels underpinned by Mauritius' governance track record, regulatory environment and established role as a gateway to investing in Africa. That said, investors flag structural concerns in the composition of Mauritius' GDP, noting the concentration in cyclical sectors, that whilst strengthen currency, can temper appetite for long-duration asset allocation.

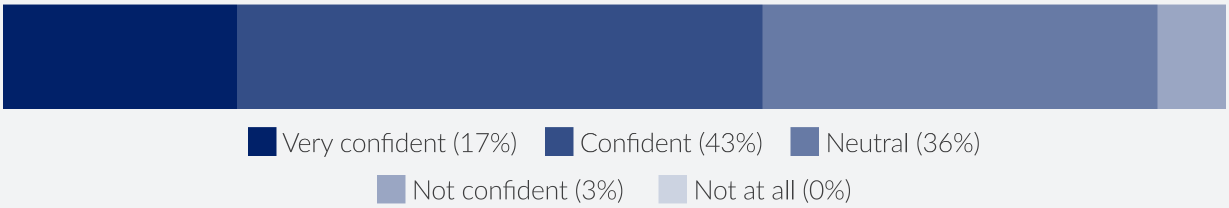
The research highlights favourable sentiment towards Mauritius' operating environment, long-term outlook and renowned brand driving sectors (tourism, financial services and real estate). However, despite the generally favourable sentiment, investor awareness of specific opportunities remains limited, and investors are seeking greater clarity towards investment opportunities.

'Investors are seeking greater clarity towards investment opportunities'

5.2 Confidence Sentiment

5.2.1 Short term confidence

Fig. 7 How would you rate your current level of confidence in Mauritius' economic outlook for 2026?



(60% positive | 36% neutral | 3% negative | Net sentiment: +57pp)

Source: Invest Africa Mauritius Investor Sentiment Survey 2026

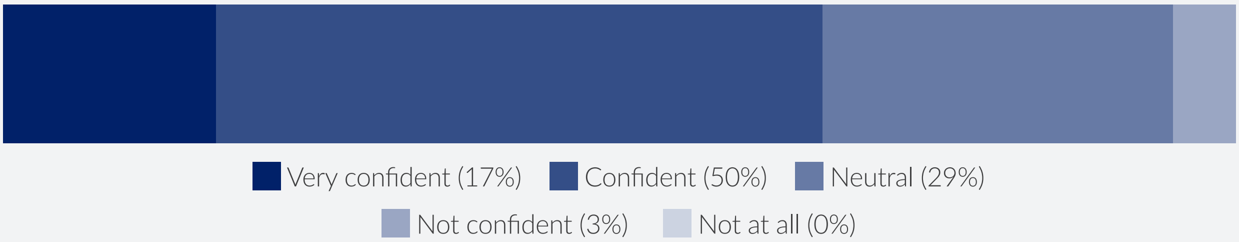
In the short-term, UK investors hold a positive perception of Mauritius. Respondents were asked to rate their current level of confidence in Mauritius' economic outlook for 2026 from 'not at all confident' to 'very confident'. Respondents recorded a net positive sentiment towards Mauritius in 2026, with 60% expressing confidence, 36% neutral and negligible negative sentiment (3%).

Whilst the bulk of investors sit in the 'confident' responses, there is a notable neutral share (36%). Rather than indicating indifference, this segment appears to reflect a cross range of offsetting factors including the short-term uncertainty in global markets and with Mauritius' growth expected to slow to around 3.4% (IMF, 2025). With minimal outright negativity recorded, this 'neutral' segment is better interpreted as a holding position - investors adopting a wait and see stance for the year ahead.

This insight was compounded by conversation with investors who made observations reflecting caution for the year ahead referencing current global conditions rather than doubts about the destination. The data points to a calibrated view, one of confidence in Mauritius' foundations, but caution about the year ahead in relation to global conditions.

5.2.2 Mid-term confidence

Fig. 8 How confident are you in Mauritius' ability to sustain competitiveness and deliver investor returns over the next 3-5 years?



(67% positive | 29% neutral | 3% negative | Net sentiment: +64pp)

Source: Invest Africa Mauritius Investor Sentiment Survey 2026

Looking across a 3–5-year horizon, investor confidence strengthens meaningfully. 67% of respondents expressed a positive view of Mauritius' ability to sustain competitiveness and deliver returns over this period, with neutral sentiment falling to 29% and negative sentiment unchanged at 3%. The uplift is important to note as the longer timeframe allows investors to look beyond near-term noise and assess fundamentals directly, and on that basis, Mauritius performs well.

Long-term confidence, however, is not unconditional. Tourism, financial services, and real estate remain the dominant drivers of Mauritius' economy, and investors identified structural considerations that temper their outlook. The concentration in tourism and real estate, cyclical sectors with exposure to external shocks, weighs on investment decisions, particularly over the mid to long term. As one investor put it, "Mauritius will always have tourism as a core industry, but it needs to diversify its revenue streams". Another echoed this concern, noting that "there's a common perception, especially after the fallout from COVID, that the economy relies heavily on tourism, making it vulnerable when visitor numbers dip." Investors acknowledged that demonstrating the breadth of other sectors "can help people understand that even in a downturn, the country can withstand shocks". This tension captures the core sentiment well: investors trust the Mauritius brand yet remain alert to its structural constraints.

'Investors also highlighted the recent change in government, noting an initial period of assessment'

Investors also highlighted the recent change in government, noting an initial period of assessment, looking for clarity and ambition in the new government's strategic plans and, critically, evidence of execution. The narrative around restoring confidence in the economy resonated strongly across conversations, with investors emphasising that intentions must be matched by delivery. For the neutral segment in particular, it suggests the combination of global signals and execution will determine whether watchfulness converts to confidence.

These dynamics underscore that whilst Mauritius' fundamentals continue to underpin its brand, UK investors are actively watching for signals that will shape their next move.

5.2.3 What is driving the confidence sentiment?

When asked to identify the key factors shaping their 3–5-year investment outlook on Mauritius, investors pointed to two dominant themes: stability and the Gateway to Africa. These emerged as the foundational pillars of long-term sentiment, reflecting how deeply the Mauritius 'stable and open' brand is embedded in investor thinking.

Stability functions as the confidence anchor. Every 'very confident' respondent cited political and macroeconomic stability, and it features in 65% of 'confident' responses. However, stability alone does not generate long-term conviction. Among neutral respondents, stability appears as a baseline assumption rather than a differentiating factor, suggesting that while it is necessary, it is not sufficient to commit investors.

The Gateway to Africa narrative is more confidence graded. It features heavily among 'very confident' and 'confident' respondents but is largely absent among 'neutral' responses and entirely absent among those expressing lower confidence. This gradient is significant. For the most confident investors, Mauritius' position as a Gateway to African markets is a genuine driver but for those more hesitant, it is not yet a compelling reason to act.

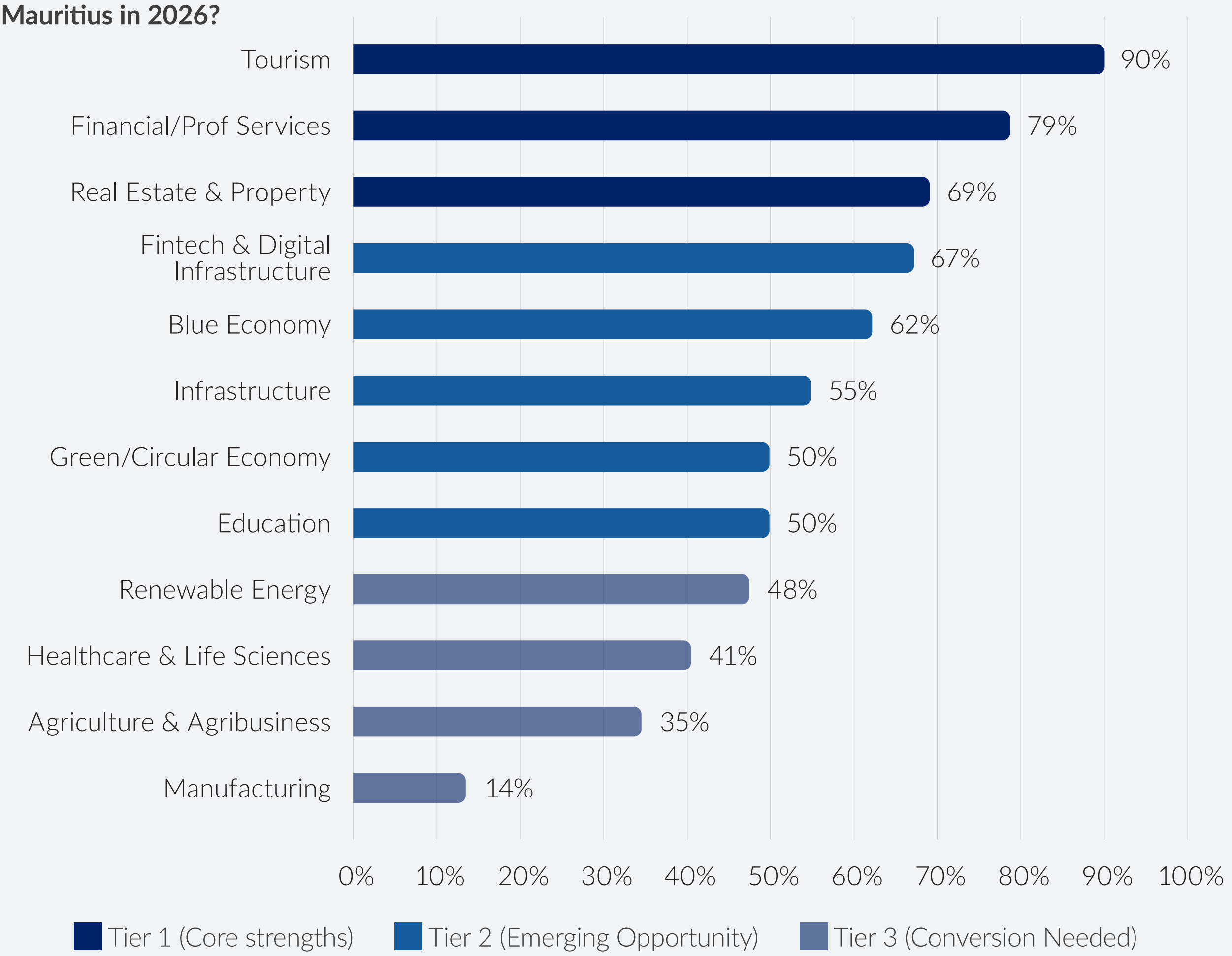
A small group challenges the gateway narrative more directly, acknowledging Mauritius' capacity but question whether the risk appetite and strategic momentum to the African market are in place to fully realise it. This is not a structural critique but a strategic one, raising a meaningful question for Mauritius: whether the opportunity lies in shifting its positioning from a stable financial gateway to an active, opportunity-led platform, one that leads with Africa-facing ambition rather than safety and conservatism.

Among neutral respondents, the picture is layered. A substantial share reflects informed, experience-based caution, citing practical constraints such as regulatory opacity, deal size limitations, and currency or return dynamics. A separate subset reflects limited familiarity rather than genuine scepticism, responses that are effectively non-committal due to low awareness rather than negative assessment. This indicates the underlying confidence distribution is stronger than the headline figures suggest.

'When asked to identify the key factors shaping their 3–5-year investment outlook on Mauritius, investors pointed to two dominant themes: stability and the Africa Gateway'

5.3 Perceptions of the market opportunities

Fig. 9 How confident are you in the investment potential and performance of the following sectors in Mauritius in 2026?



Source: Invest Africa Mauritius Investor Sentiment Survey 2026

Unpicking investor perceptions across Mauritius' sectors, the data reveals a strongly tiered picture of confidence. When asked to rate investment potential and performance across key sectors for 2026, investors demonstrated deep conviction in a narrow band of proven markets, cautious and conditional interest in a strategically important middle tier, and tangible hesitancy toward sectors that have not yet established a clear narrative with UK audiences.

'They signal an appetite for a broader economic story of job-creation and productive investment'

The pattern maps closely with global investor behaviour, where sentiment is driven by familiarity, structural growth stories, and track record. Mauritius scores well where these conditions are met, but the challenge is building credible, evidence-led narratives for the sectors that are not yet resonating. Investors describe the economy as "very limited to tourism and financial services", highlighting their perception of this as a vulnerable composition. These are not passive observations. They signal an appetite for a broader economic story of job-creation and productive investment, asking Mauritius, "if there is a different story, let us know."

5.3.1 Tier 1, the core conviction market (>69%)

Investors are most comfortable in sectors they know well and where Mauritius has an established track record. Tourism leads by a considerable margin at 90% net sentiment. As the anchor of FDI into Mauritius, this result reflects an entrenched and well-understood investment case. UK investors trust this sector, and confidence here does not require reinforcement.

Financial and professional services follow at 79% net sentiment, reflecting recognition of the sector's structural significance to the Mauritian economy, accounting for 13.4% of GDP in 2024 (US Dept of Trade, 2026). UK investors are familiar with this space, and Mauritius' regulatory environment and international connectivity support confidence. Real estate and property sit close behind at 69% net sentiment. These sectors are where the investment case is well established and broadly accepted among UK investors.

5.3.2 Tier 2, the most strategically important band (69%-50%)

This band contains five sectors where investor interest exists, but conviction has not yet solidified. These represent the most important frontier for Mauritius' investor engagement strategy, sectors where targeted narrative development could meaningfully shift sentiment.

Fintech and digital infrastructure lead the tier at 67% net sentiment and is arguably the most strategically significant.

> **'These sectors represent the most important frontier for Mauritius' investor engagement strategy'**

Fintech has become a focal point for emerging market investment, with growing investor attention on bridging infrastructure gaps and enabling digital participation. Mauritius' positioning in this space is recognised, but the case requires sharper articulation to convert interest into conviction.

The blue economy follows at 62%, reflecting growing UK investor awareness of Mauritius' maritime potential. ESG mandates are increasingly shaping capital allocation, and investors are looking more actively at blue economy opportunities. The narrative exists in investors' minds but indicates depth may vary. The green and circular economy registers positively given the relatively new development of this sector in Mauritius, tracking the broader ESG themes that are appearing in UK investor decision-making. Awareness is present, but investors lack the full conviction that comes with a more developed market narrative. Education (50%) rounds out the tier, sitting at the boundary between strategic and cautious interest, indicating the sectors' base level recognition as an emerging education hub.

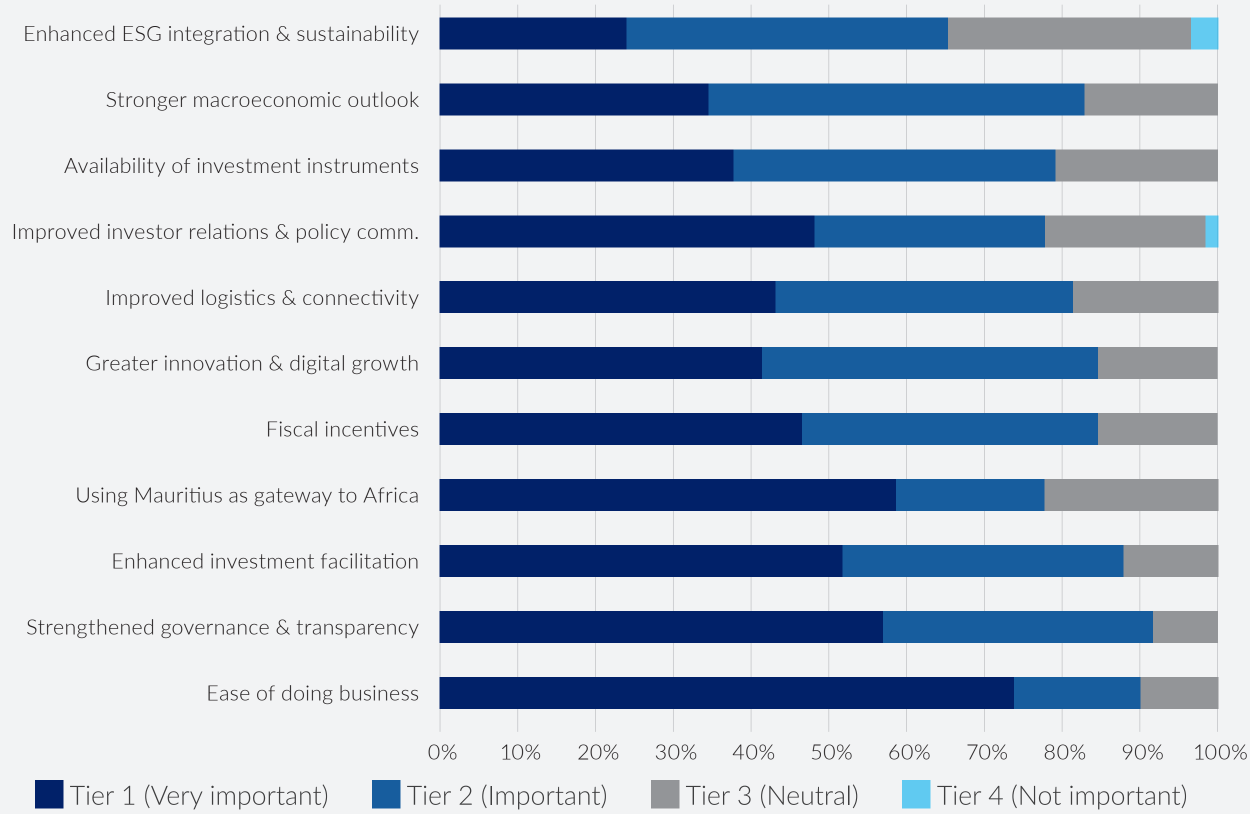
5.3.3 Tier 3, the not understood and not supported (<50%)

Renewable energy (48%), healthcare and life sciences (41%), agriculture and agribusiness (35%) and manufacturing (14%) sit at the bottom of the confidence distribution across these sectors. This indicates not purely negativity but suggests a combination of unfamiliarity and an underdeveloped investment case. Manufacturing is the clear outlier and warrants particular attention. It is the only sector where a majority of UK investors express a neutral to negative perception. This suggests a more effective and resource-efficient approach would be to conduct targeted engagement with specific investor profiles where a credible fit exists.

Across this tier promotional resources should be directed with precision. The strategic objective is not to shift broad market perception in the near term, but to identify and engage the investor segments most likely to respond, building familiarity and avoiding dilution of effort across audiences that are not yet ready to engage.

5.4 Understanding investment drivers in international markets

Fig. 10 How important are these factors in influencing your decision to invest or increase investment in Mauritius in the future?



Source: Invest Africa Mauritius Investor Sentiment Survey 2026

Understanding what drives UK investor decision-making is central to shaping Mauritius' engagement strategy. The data provides a clear hierarchy of priorities, one that carries direct implications for policy, promotion and facilitation.

Operational simplicity is the single strongest signal in the entire dataset. Ease of doing business ranks as 'very important' to 74% of respondents, the highest individual rating recorded. UK investors are looking for frictionless operations: streamlined company formation, digitalised licensing, and predictability throughout the investment process. As one investor put it, "clear, streamlined, and straightforward frameworks are a big prerequisite for considering a project in these kinds of jurisdictions." This is the foundation upon which the other investment drivers sit. Where friction does exist, investors expect Mauritius to be responsive and proactive in resolving it.

Governance and transparency record the highest net importance score in the dataset at 94%, with no investor rating it unimportant. This is an unambiguous signal. The new government's reform agenda is therefore a consequential factor in play right now, and UK investors are watching its implementation closely. Investors are clear on what they want to see: "demonstrate that the economy knows what issues are present and let it be known what is being done to address them. This can turn perception all the way around."

Enhanced investment facilitation ranks as a close second priority, with 52% of respondents rating it 'very important'. This is a direct call to action. The speed of responses, quality of investor support, and ability to navigate the investment system are material factors in the investment decision. Investors are signalling that proactive, knowledgeable facilitation drives interest, and that the government's role in this process is central.

For the right investors, the Gateway to Africa narrative functions as a genuine strategic differentiator. 59% rate it 'very important', a figure that ranks above fiscal incentives, reinforcing that this is a commercial proposition. Mauritius' regulated, treaty-networked position as a bridge into African markets carries real value for investors with an Africa strategy. However, the Gateway should not to be taken for granted. One investor noted, "we set up in Mauritius because we wanted to be fully African" but decided to move to a different jurisdiction due to various factors. The 22% neutrality on this driver is largely explained by relevance: 45% of respondents do not use a gateway to enter Africa, so for this group the narrative simply does not apply.

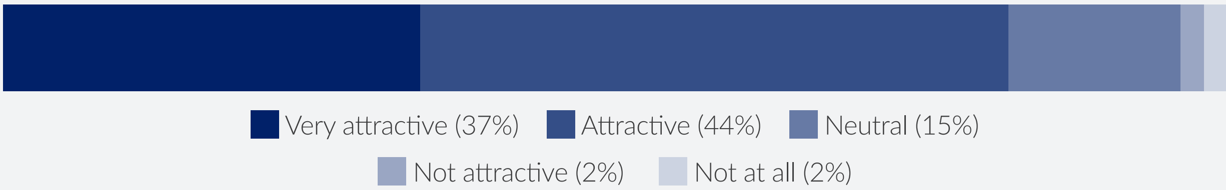
Fiscal incentives rank fifth, and the positioning is instructive. UK investors do not dismiss tax competitiveness, with one noting it is "desirable in terms of tax efficiency, wealth management systems, and those kinds of factors", but they treat it as a baseline assumption rather than a differentiator. Together these responses reflect a picture where fiscal terms confirm the investment decision rather than initiate it. Ease of doing business, governance and facilitation must land first.

Innovation, digital infrastructure and logistics sit in the mid-range of the driver hierarchy. These are not immediate priorities for most UK investors today but will be important for the future generation of investment flows. ESG registers with 31% 'neutral', but reading this as an indication that sustainability does not matter would be a significant misreading of the data. UK institutional capital is increasingly subject to mandatory sustainability criteria, and the composition of future capital flows will reflect this shift. Building a credible, substantiated ESG framework now positions Mauritius favourably for future access to capital pools where these criteria will be non-negotiable.

'This is a direct call to action... Investors are signalling that proactive, knowledgeable facilitation drives interest'

5.5 The Gateway to Africa Narrative

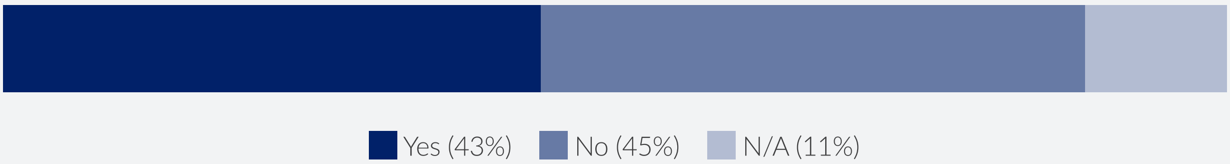
Fig. 11 How attractive is Mauritius as a gateway to the African market compared with other alternatives?



(81% positive | 15% neutral | 4% negative | Net sentiment: +77pp)

Source: Invest Africa Mauritius Investor Sentiment Survey 2026

Fig. 12 Do you invest in Africa via a gateway?



Source: Invest Africa Mauritius Investor Sentiment Survey 2026

The structural case for Mauritius as a gateway to investing in Africa is, by the data, already compelling. Within the context of the African Continental Free Trade Area (AfCFTA) and its 1.4-billion-person market, Mauritius presents a well-defined investment platform: preferential market access combined with political stability, a robust legal framework and established financial infrastructure. For UK investors looking to enter African markets, this combination carries considerable weight, and the data reflects it clearly.

The Gateway narrative is the highest-rated metric across the entire dataset. 81% of respondents find Mauritius attractive as a gateway to investing in Africa, far outperforming other key measures such as Government engagement (68% positive) and promotional effectiveness (60% positive). This data underscores that the Gateway to Africa narrative is an intrinsic, recognised strength. This distinction matters: the gateway case is already built.

The 'awareness' distinction reinforces the strength of the narrative. Among investors who cited high awareness of investment opportunities in Mauritius, 80% view Mauritius as a Gateway to Africa positively. For investors who cited low awareness of investment opportunities, 75% view Mauritius as a gateway positively. This is the smallest divergence by awareness levels across the entire dataset.

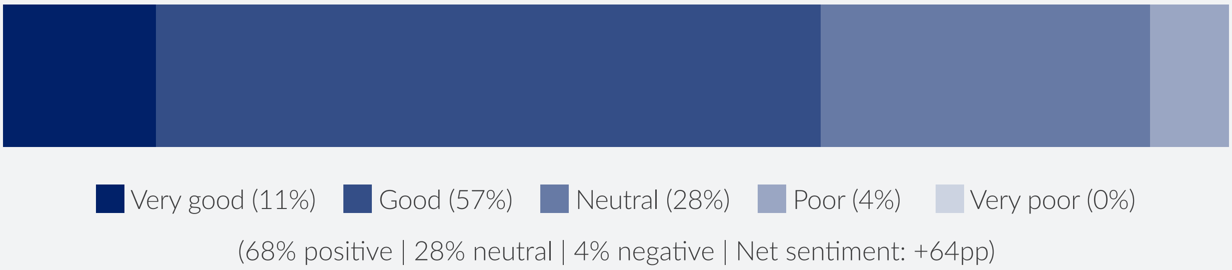
The Gateway to Africa narrative is uniquely resilient, resonating even among investors with limited familiarity with Mauritius, and strengthening as that familiarity deepens. No other dimension of the Mauritius investment case performs with this consistency across 'awareness' levels.

The implication is significant, and it reframes the strategic priority. The Gateway narrative requires the least persuasion in the dataset. The challenge is no longer to prove it but to evolve it. Mauritius has an opportunity to shift its positioning from one of geographic access to one of operational capability, presenting itself not simply as a point of entry but as a platform for managing African complexity. This means articulating the full depth of what Mauritius offers as an operating base: the legal and regulatory infrastructure for structuring pan-African investments, the financial services ecosystem for capital deployment and risk management, and the institutional stability required.

This reframing must move the conversation from where Mauritius is to what Mauritius can do. For investment promotion efforts, it represents the next frontier in competitive positioning, targeting investors who are not simply looking for access to Africa, but for a credible, capable and well-governed partner in navigating its investment environment.

5.6 Government Engagement and Investment Promotion

Fig. 13 How would you rate the Government of Mauritius' overall engagement with investors?

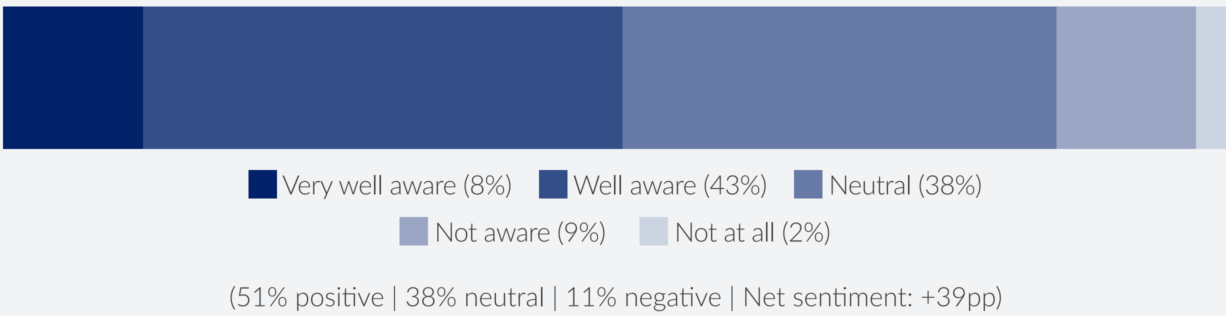


Source: Invest Africa Mauritius Investor Sentiment Survey 2026

Mauritius' approach to investment promotion is broadly well-regarded among UK investors, with 68% viewing the country's promotional strategy positively. The Government of Mauritius is a well-regarded institution among UK investors, and the strength of Mauritius' promotional reputation reflects that standing. However, the data reveals a meaningful execution gap: positivity is not fully translating into either investor awareness or clarity of information, and this distinction carries considerable implications for how Mauritius deepens its engagement with the UK market.

Whilst confidence in Mauritius' promotional vehicles is evident, awareness of specific investment opportunities tells a more qualified story. Only 51% of respondents report being 'very well aware' or 'well aware' of available opportunities, a figure that sits in notable contrast with the broadly positive perception of promotional activity. The gap between how investors rate the strategy and how well informed they actually feel is the telling signal.

Fig. 14 How would you rate your level of awareness of current investment opportunities in Mauritius?



Source: Invest Africa Mauritius Investor Sentiment Survey 2026

The picture widens further when looking at perceived clarity of investment information. Only 37% of respondents rate available information as 'very clear' or 'clear', with 40% neutral and 23% actively finding it unclear. This is a significantly weaker result than the engagement ratings, pointing to a disconnect between the strength of Mauritius' promotional brand and the accessibility of the information sitting behind it. Investors are receptive to the proposition, but the detail required to move from interest to action is not reaching them with sufficient clarity or structure. As one investor noted, "we would like to see more regular dissemination sessions on foreign investment activities", a straightforward signal that the appetite for engagement exists, but the mechanisms to service it need strengthening.

Fig. 15 How clear is the information available on specific investment opportunities in Mauritius (returns, risks, timelines, regulations)?

Very clear (2%) Clear (36%) Neutral (40%) Not so clear (23%) Not at all (0%)

(33% positive | 40% neutral | 23% negative | Net sentiment +10pp)

Source: Invest Africa Mauritius Investor Sentiment Survey 2026

Further, investors are not only calling for better information but for more accessible and consistent engagement with government and decision-makers directly. The consequences of falling short here are evident: "we explored opening a project in Mauritius a few years ago, but delays and difficulty engaging with government meant the opportunity ultimately moved to another country. The process felt slow, whereas investors often need governments and economies to move far more quickly". Another investor was direct: "from an investor's perspective, access to government and decision-makers has been difficult. Even with support from the UK Department for Business and Trade, it took weeks to receive responses" and highlighting arranging meetings was challenging.

With nearly a quarter of respondents actively registering dissatisfaction with information clarity, and investors citing tangible instances where slow engagement cost Mauritius a deal, this is not a marginal finding. What requires attention is the information architecture and operations behind the promotional brand, ensuring that opportunity details are accessible, well-structured and that the systems supporting investor engagement match the ambition of the promotional strategy itself.

5.7 Interview Snapshots

What are investors saying? The following section showcases a sentiment snapshot from three of the UK investor interviews carried out by Invest Africa.

Profile 1: Investor

Mauritius remains largely reliant on tourism and financial services, and while efforts to diversify are ongoing, factors such as limited natural resources, import dependence, and competitiveness considerations present some constraints.

There is potential in areas such as renewables (particularly offshore wind), healthcare, airports, and infrastructure. However, competition is significant, and major projects may often involve established partners like India or China, which could affect the scale of UK participation.

Mauritius continues to rank mid-tier in regional attractiveness. In the short term, factors such as evolving government priorities, limited awareness of ECA benefits, and relatively gradual processes may temper activity over the next 12–18 months, though the longer-term outlook remains more positive.

Profile 2: Manufacturing Operator

As a tourism- and finance-oriented economy with modest trade volumes, Mauritius has seen some shifts in its manufacturing base, including movement of textile production to lower-cost markets such as Madagascar, India, and Bangladesh. This has influenced its positioning for large-scale trading operations.

Key constraints include limited labour competitiveness, reliance on imported workforce, and limited incentives to attract investors, despite its continued role as a holding company hub due to strong tax treaties.

In the near term, larger markets may currently offer more developed industrial infrastructure and greater scalability. though opportunities could develop over a longer 5-10 year horizon.

Profile 3: Energy Operator

Investment guided by local presence and predictability. Decisions are influenced by the value of having trusted local partners, well-defined regulatory frameworks, and clarity around capital repatriation, permitting, and licensing processes.

While the market is relatively stable, its small size and limited economies of scale mean it requires similar effort to larger markets. It becomes particularly attractive when processes are highly streamlined and predictable.

Priority is given to project finance opportunities with significant leverage and equity returns of 20% or more, particularly in markets with strong demand, supportive financing options, and clear regulatory environments.

6. Conclusion

Key Takeaways

Perception: UK investor sentiment towards Mauritius is broadly positive and, in places, genuinely strong. Confidence in stability, governance and the Gateway to Africa narrative provides a solid foundation, with conviction strengthening meaningfully over the medium term as investors assess fundamentals over near-term noise.

Barrier: Mauritius' competitive advantage is held back less by reputation than by execution. Specifically, the gap between a well-regarded promotional brand and the clarity, accessibility and responsiveness of the engagement sitting behind it.

Requirement: Investors need frictionless operations, demonstrable governance delivery and proactive facilitation before capital commits. The promotional offer must match the ambition of the brand.

Opportunity: Articulating a broader, evidence-led investment case across emerging sectors while improving the speed and clarity of investor engagement represents the clearest path to converting existing awareness and interest into capital commitment.

Recommendations

1. **Closing the information architecture gap** should be treated as the immediate strategic priority. Strengthen the underlying information architecture by upgrading investor-facing materials. Develop investor-ready sector playbooks, each clearly outlining deal processes, structures, and step-by-step regulatory pathways. Include contact persons for ease of access to dedicated support.

2. **Establish a structured UK Investor Engagement Programme**, with regular, sector-specific briefings delivered to investors supported by a clearly articulated investment pipeline. These engagements should provide detailed, transaction-level insight, including investment structures, timelines, and risk considerations.

3. **Increase the consistency, clarity, and investor relevance of communications** relating to the Government's reform agenda. A regular investor brief could be introduced as a core output, translating policy developments into clear investment implications and highlighting improvements in the ease of doing business, including regulatory simplifications, reduced red tape, and streamlined approvals. Briefs should provide a step-by-step roadmap for investors, outlining the processes required to evaluate, structure, and execute investments, with clear guidance on timelines, government touchpoints, and available support, enabling UK investors to navigate opportunities in Mauritius with confidence.

4. **Prioritise converting interest into conviction within the four "Tier 2" sectors** shifting sector-focused promotion from broad promotion to targeted, evidence-led engagement. This requires clear articulation of the specific opportunities emerging from these sectors and actively develop them into an investment pipeline. Central to this is the production of detailed, transaction-level case studies that demonstrate bankability, including transparent information on deal structures, timelines, expected returns, and risk management, alongside clear evidence of how government is supporting delivery through policy, regulation, and facilitation.

5. **Evolve the Gateway to Africa narrative** from geography to capability. Reposition Mauritius through a dedicated marketing campaign for Mauritius as an Africa operating platform, focused on execution capability rather than location. Publish case studies of UK firms using Mauritius as a financial gateway and develop a capability toolkit, including for pathways for African investments via Mauritius.

Trade Supplement:
UK Buyers Sentiment towards the Mauritian Apparel Industry

1. Introduction

This supplement was undertaken as part of the wider research initiative of the UK-Mauritius Investor Sentiment Report 2026. The supplement was designed to inform UK and Mauritian policymakers, business leaders, and industry community of the evolving dynamics in the UK-Mauritius apparel trade.

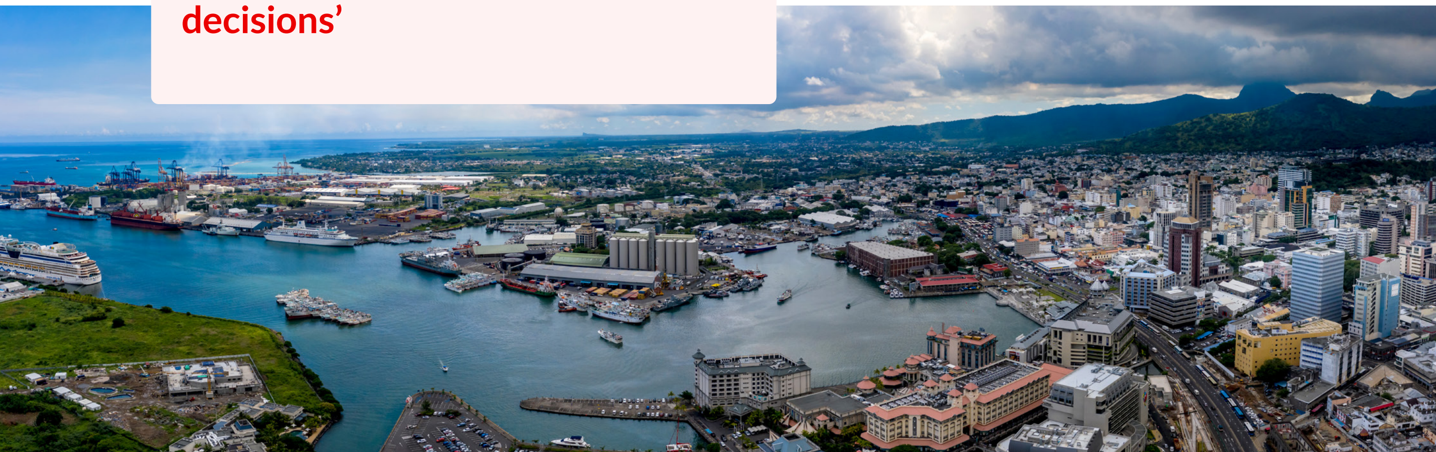
This component of the Investor Sentiment Report focuses on the Mauritian apparel sector. The objective of the study was to generate buyer-led, evidence-based insights into UK apparel sourcing decisions, procurement requirements, and perceptions of Mauritius as a trade partner and competitive supplier relative to alternative sourcing markets.

The findings aim to support UK and Mauritian stakeholders to strengthen market access, align production with UK buyer expectations, and identify targeted interventions to enhance UK-Mauritian apparel trade engagement.

Invest Africa conducted interviews with UK apparel buyers, providing the opportunity for participants to share practical insights into UK apparel sourcing strategies and decision-making, highlight their views on the strengths, gaps, and constraints of sourcing from Mauritius as well as provide recommendations for Mauritian producers and policymakers to better align with UK buyer requirements.

The report findings complement the Investor Sentiment Report to provide a demand-side perspective on trade and sourcing dynamics.

‘The objective was to generate buy-led, evidence-based insights into UK apparel sourcing decisions’



1.2 Executive Summary

Mauritius is acknowledged by UK buyers as a high quality and politically stable apparel sourcing destination, yet it consistently sits at the periphery of sourcing strategies: considered but not prioritised, valued but not well known. The insights suggest that Mauritius should prioritise addressing the limited visibility and lack of market intelligence reaching UK buyers – a gap that can be addressed in the short term. Over the longer term, Mauritius should focus on sharpening its market differentiator, assessing the opportunity to position itself as a market leading African destination for compliance and ethical apparel sourcing.

1.3 Trade & Apparel Industry Context

Mauritius is an upper-middle-income economy, globally recognised for its tourism and financial services sectors. Underpinned by strong governance and institutional stability, it has demonstrated consistent resilience to external shocks. GDP is projected to reach $16.76 billion in 2026, though real growth is expected to modestly increase to 3.4%, after 2025 saw softening public expenditure, slowing construction activity, and emerging pressures on export competitiveness (World Bank Group, n.d.).

Its open, business-friendly environment has earned Mauritius 1st place among 47 Sub-Saharan African countries in the 2025 Index of Economic Freedom and 15th globally. Central to this is an extensive network of preferential regional trade agreements including - COMESA, SADC, an Economic Partnership Agreement with the European Union, and bilateral arrangements with China, India, Turkey, and Pakistan - providing preferential access to nearly 75% of the world's population (EDB Mauritius).

In 2024, Manufacturing contributed 12.8% of GDP, supporting 60,000 jobs, and covering 1,500 product lines exported to 115 countries (EDB Mauritius). The apparel sector has been a foundational pillar of this since the 1980s, when Hong Kong investors established factories within Mauritius' Export Processing Zones, catalysing technology transfer and local industrial development. The sector grew rapidly on the back of preferential trade access, with European buyers finding Mauritian goods increasingly competitive as other markets faced trade barriers.

However, the sector has faced sustained structural pressures. The expiry of the Multi-Fibre Agreement in 2004 intensified competition from Asian textile hubs, while rising labour and energy costs eroded price competitiveness against large-scale producers. Many producers were forced to make the decision to close or responded by investing in modernisation and technology to reposition themselves within the value chain (UNDP, 2020). The COVID-19 pandemic compounded these challenges, with manufacturers experiencing sharp order declines, cancellations, and capacity reductions (UNDP, 2020). Since then, previous Government support mechanisms, including the Freight Rebate Scheme, which provided a 40% rebate on air freight and 25% on sea freight, alongside the Export Credit Insurance Scheme (EDB Mauritius) have helped cushion some of these increase costs.

From the UK perspective, Mauritius represents a well-established and strategically significant trade partner. The 2019 ESA-UK Economic Partnership Agreement, followed by the Strategic Trade Partnership in 2023, ensured continuity of duty-free exports post-Brexit that mirrored the EU interim Economic Partnership Agreement, meaning Mauritian exporters could maintain their buyer relationships without re-engineering sourcing arrangements (UK Government, 2024; UK Government, 2025). The UK is currently Mauritius' fifth-largest apparel export destination, accounting for 9.1% of exports, with UK clothing imports from Mauritius totalling £11.8 million across the last four quarters to Q3 2025 (UK Government, 2026).

It is against this backdrop that the report examines how UK apparel buyers perceive Mauritius as a sourcing destination today. With the trade frameworks in place, the critical question becomes whether Mauritius is effectively converting its access to the UK market into commercial opportunity, and what Mauritian producers and policymakers must do to align more closely with UK buyer expectations. The findings that follow provide demand-side insight to help answer exactly that.

2. Research Methods

2.1 Methods

This study adopts a qualitative, interview-led research approach designed to capture in-depth, expert-led insights from UK apparel buyers. Invest Africa conducted a series of semi-structured interviews with a purposefully selected group of UK apparel buyers and sourcing professionals. Interviews were semi-structured to allow both consistency across key themes and flexibility to explore participants' direct sourcing experiences.

The interview framework focused on core dimensions shaping sourcing decisions, including awareness and engagement with Mauritius, perceptions of product quality and compliance, cost competitiveness, logistical considerations, and sustainability requirements. Participants were also asked to reflect on Mauritius' positioning relative to alternative sourcing markets and explored conditions under which they would expand or reduce sourcing from Mauritius. All interviews were conducted on a confidential basis, with insights anonymised to ensure open input and protect any potential sensitivities.

These primary insights were complemented by targeted desk research on trade flows, sector dynamics, and global apparel sourcing trends to contextualise buyer perspectives within broader market developments. This combined approach enables the report to present a demand-side view grounded in both real-world procurement experience and wider industry context, supporting the development of practical buyer-informed recommendations for UK and Mauritian stakeholders.

3. Analysis

3.1 Quality, Product and Positioning

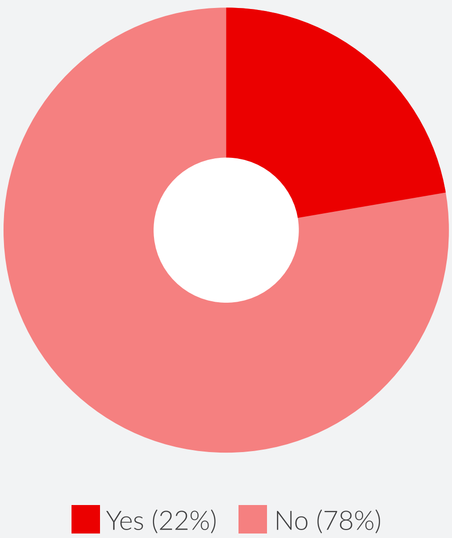
With over five decades of experience since its apparel industry took off, Mauritius has quietly built a sourcing reputation that carries real weight among those who know the Mauritian industry. In an increasingly competitive global market, quality has emerged as Mauritius' defining characteristic and among the buyers engaged, sentiment on this point was unequivocal.

The consensus across interviews was striking in both its consistency and its strength. Every buyer interviewed referenced the high quality of Mauritian apparel, making it the single most consistent perception across the research. Buyers described produce from Mauritian suppliers as well-made and reliable, with one buyer stating that "Mauritius was leagues above on quality" when reflecting on their experience sourcing denim. This strength of language is notable, it speaks not just to competence, but to a meaningful differentiator from alternative sourcing markets.

Howver, when asked about Mauritius' niche, UK buyers did not express a clear or consistent view of its market positioning. Perceptions of product strengths varied, one buyer working in the tailoring industry perceived strengths in 'made to measure', whereas others within ready-to-wear circles suggested woven production, jerseys, or more detailed and intricate products; another buyer described the market as well suited to "casual-smart wear". The absence of a unified positioning beyond quality itself may point to broader awareness and marketing challenges among the industry, an issue explored later in this report.

Whilst Mauritias may not be periceved to have an identifiable niche, what is clear is that quality remains a powerful reputational asset for Mauritius' in the UK market. The challenge lies in ensuring that reputation is both more widely known and more strategically leveraged - widening the buyer base while maintaining the relationships it already holds.

Fig. 1 Do you perceive Mauritius to have a niche in the apparel market?



Source: Invest Africa UK Buyers Interview Data 2026

3.2 Quality in Context

When UK buyers contextualised Mauritian product quality within the broader global sourcing landscape, the picture was consistently favourable. Mauritius' quality was positioned ahead of destinations perceived primarily as low-cost, high-volume producers, with multiple buyers drawing a distinction between Mauritius and Bangladesh.

Instead, buyers likened Mauritius' product quality more closely to Vietnam, and in some cases placed it above destinations such as Sri Lanka and India for technically finished products. This positioning matters. It places Mauritius' quality capabilities firmly in the tier of mature sourcing destinations, markets chosen not on price alone, but based on production and finish quality. One buyer noted that Mauritius has moved beyond simple cut-and-sew operations, with the right suppliers capable of handling more complex, higher-margin production requirements. This holds meaningful commercial value in the UK buyer market that is increasingly seeking quality and consistency alongside value.

These markets (Vietnam, Sri Lanka and India), alongside Turkey, Morocco, and Egypt, were most frequently cited by participants and represent the destinations against which Mauritian suppliers are being evaluated. Mauritius' reputation for quality is not in question; but it must be ready to differentiate itself against these destinations.

3.3 Cost

Respondents consistently emphasised that Mauritius is "not a cheap sourcing destination", noting that this is well understood by those familiar with the Mauritian apparel industry. For a significant proportion of buyers, cost remains the primary decision driver when selecting a sourcing origin. This is particularly acute among smaller brands, where tighter margins and less purchasing efficiency make price sensitivity more pronounced. On this basis, Mauritius will not be the right fit for every buyer, and nor should it attempt to be. The sector's strategy should reflect this reality: Mauritius is not, and should not position itself as, a catch-all, low-cost destination.

Importantly, the picture on cost is not uniformly prohibitive. As sourcing costs rise across Europe, Turkey, and other proximity markets, Mauritius is becoming comparatively more attractive for certain buyers. One buyer noted that Mauritius was "cost competitive" relative to other options they had assessed, a finding that directly informed their decision to begin working with Mauritian suppliers. This is a meaningful signal. It demonstrates that for the right buyer profile, cost need not be a barrier.

What buyers who do source from Mauritius consistently note is that the higher price point matches better-made produce. Furthermore, the value proposition extends beyond the garment itself, encompassing the quality and stability that the sector offers. As one buyer notes, "although low-cost sourcing remains an important component in the global apparel supply chain, buyers are expressing interest in an increasing trend in nearshoring and relocation" a shift that reframes how cost competitiveness is assessed. Price is no longer evaluated in isolation; lead times, production capability, and supply chain resilience are all part of the equation.

Looking ahead, Mauritius' competitive advantage will not be won on costs. With labour and production costs rising, Mauritius should look to build the hallmarks of a 'knowledge-based' sourcing destination, developing its capacity on automation, innovation, design capability, service quality, and branding. The brands already sourcing from Mauritius demonstrate that the destination is commercially viable. The opportunity now is to build that narrative.

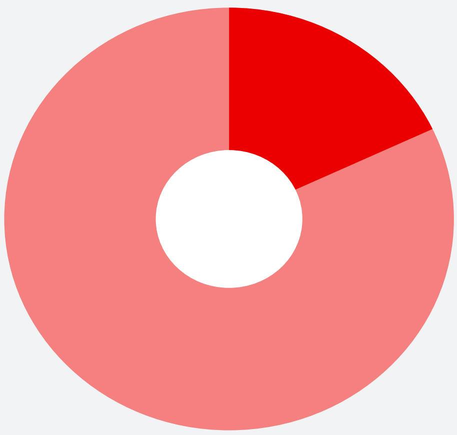
'Looking ahead, Mauritius' competitive advantage will not be won on costs. With labour costs rising, Mauritius should look to build the hallmarks of a knowledge-based sourcing destination'

3.4 Supplier Diversification

Understanding how UK buyers perceive Mauritius is one dimension; equally important is where Mauritius sits within UK sourcing strategies. On this point, participants perceived that Mauritius does not currently occupy a central position in strategies. Buyers described it as a destination that "could be discussed as a destination but not a key one", one that may "feature within sourcing portfolios" but "never the first choice". This is an important baseline from which to assess the sector's commercial opportunity.

It is worth noting that buyers who participated in this research had prior experience sourcing from Mauritius, either in current or previous roles, which may have introduced a degree of bias. Their familiarity with Mauritius enables greater insights but is directional rather than representative of the entire UK buyer market.

Fig. 2 Are you currently sourcing from Mauritius?



Source: Invest Africa UK Buyers Interview Data 2026

Yet the outlook is not pessimistic. Supply chain disruptions experienced during COVID-19, from factory shutdowns to freight volatility, prompted widespread sourcing reassessments among UK buyers, accelerating a shift toward multi-origin strategies and reducing over-reliance on single geographies. Within these reassessments, Mauritius is actively being considered. There is, as one buyer put it, "a growing intrigue from brands", with others describing early-stage evaluations, "we're having a look".

However, Awareness emerges as a significant underlying challenge. As one buyer noted, it is "important to flag that Mauritius is not that well known", with several buyers acknowledging that their knowledge of the sector derived entirely from direct supplier interactions rather than any broader market awareness. One buyer remarked that often "the main reason to go there would be if a vendor you already know happens to have factories in place there", while another observed that "it is not well known what goes on in Mauritius". These are telling reflections, they suggest that Mauritius' reputation, while strong among those who have engaged with it, has not yet translated into wider visibility within the UK buyer community.

Buyers acknowledged that "Mauritius has all the official credentials required to trade with the UK", and the post-COVID sourcing environment has created a tangible opening.

For buyers familiar with it, Mauritius' stable industry reputation and credentials position it well within these resilience-led sourcing models. As one buyer observed, "with the right kind of learning and marketing, there is an opportunity for Mauritian suppliers with UK buyers". The task now is to drive wider intrigue to grow active sourcing relationships.

3.5 From a candidate to a partner

While the data indicates that Mauritius is being actively considered by a selection of UK buyers, consideration alone does not translate into commercial relationships. Analysis from the interviews uncovered significant barriers that stand between Mauritius featuring in a sourcing considerations to becoming active suppliers, and these barriers are not purely commercial in nature.

Where business between UK buyers and Mauritian suppliers has taken place, the experience has been positive. Buyers described suppliers in general as having “very reliable” and “good communications”, with one buyer noting samples were “always sent on time and sometimes early”. This is an important foundation. It demonstrates that when relationships are established, Mauritian suppliers perform well against buyer expectations.

The more pressing challenge is that these relationships are rarely being initiated in the first place. UK buyers consistently noted a striking absence of proactive outreach from Mauritian manufacturers. In contrast, buyers described being “bombarded” with emails and LinkedIn approaches from suppliers in competing markets, a theme heard across multiple interviews. Mauritian manufacturers are largely, and in some cases completely, absent from this landscape. The consequence is that Mauritius is not entering buyer consideration through the channels that competing origins are actively engaging.

The problem is compounded when buyers attempt to initiate contact themselves. One buyer shared a particularly informative experience: “we really wanted to explore bringing on board Mauritian suppliers and reached out to many, but we had little response”. The lack of both proactive and reactive engagement ultimately led that buyer to redirect their attention to other markets, and Mauritius was dropped from their diversification programme. This is a significant and avoidable commercial loss.

Beyond direct outreach, buyers highlighted a broader absence of visibility. As one noted, “you don’t really hear about Mauritian suppliers, they need to raise their profile to get in with the UK market”. Others observed that “we don’t see Mauritius suppliers at trade shows”, and that there “generally exists a lack of knowledge about what goes on in Mauritius”. These are not abstract observations; they point to a concrete gap in market presence that competing sourcing destinations are filling.

Discoverability presents a further structural barrier. Buyers attempting to research Mauritian suppliers independently find that information on factory capabilities, capacity, and production specialisms are difficult to source without direct contact, which, as noted above, itself presents challenges.

For some buyers in particular, the challenge lies in knowing which manufacturers are the right fit for their scale and requirements. Some buyers expressed their perception that Mauritius’ factories were unflexible with its Minimum Order Quantities (MOQs) which made the market more naturally suited to larger businesses, another buyer described it as a “good market for larger shipments and core commodity lines”. This was not, however, a universal experience as other participants noted that some factories provided flexible MOQs. This suggests the issue is less one of availability but rather an information gap - one that Mauritius is able to address.

As a clear and practical solution, one buyer suggested providing a central directory with “factory profiles, photographs, credentials, lead times, capacity to enable buyers to gain a general understanding of what is going on and what the capabilities possessed are”. Such a resource would meaningfully reduce the burden on buyers exploring Mauritius as a sourcing option, and would signal an organised, market-ready industry.

Taken together, these findings make clear that sourcing exclusion is not driven by commercial factors alone. Limited engagement, lack of supplier visibility, and scarcity of accessible information points to a clear, addressable engagement gap distinct from traditional price or capacity constraints. For Mauritian producers and policymakers, this represents one of the most actionable strategic levers available.

‘Where business between UK buyers and Mauritian suppliers has taken place, the experience has been positive’

3.6 Compliance without compromise

For UK buyers, adherence to labour regulations, audit compatibility, and ethical sourcing standards are non-negotiable entry requirements. Suppliers that cannot meet these baseline expectations are simply not viable partners, regardless of price point or production capability. As the regulatory environment tightens and consumer scrutiny intensifies, the ability to comply with evolving sustainable practices and requirements is increasingly a condition of maintaining UK market relevance.

On this front, Mauritius is well positioned. Many Mauritian suppliers comply with internationally recognised certifications and standards, including GOTS, OEKO-TEX, ZDHC, REACH, SMETA, the Sustainable Apparel Coalition, and the Science Based Targets initiative. Buyer sentiment broadly reflects this standing. Interviewees noted that Mauritius has comparatively strong labour legislation and described it as being "spoken about as a safer option" and "one people are willing to explore". One buyer confirmed that "Mauritian suppliers generally demonstrate a solid level of compliance with [company redacted]'s regulatory, ESG, and ethical sourcing requirements". These reflections are a meaningful endorsement of the sector's baseline credentials.

That said, some buyers referenced previous instances of non-compliance, citing cases where "working conditions did not meet certain regulatory requirements". One noted they were "aware of some issues in ethical compliance with Mauritian suppliers, have been very careful to choose suppliers with excellent third-party audits". However, the consistent view across interviews was not on the need for a perfect record, but on the importance of transparent and swift corrective action. As one buyer observed, "misconduct can happen in any market but as a smaller market [Mauritius] must ensure it appropriately deals with cases". In short, how issues are handled matters as much as whether they occur.

'Mauritius is already perceived as politically stable and comparatively low risk. A rare and valuable quality in the current sourcing environment'

Beyond compliance, several buyers noted that, particularly in reference to ESG, their brands are looking to actively position ahead of the current legislation. This was not purely out of regulatory obligation, but because it "helps with their reputation which is key, even if not necessarily legislative". Participants signalled an important shift: ESG is evolving from a reporting requirement into a sourcing enabler. Buyers are increasingly seeking partners that can help them lead on sustainability, not merely keep pace with it. For Mauritius, this represents a strategic opportunity, to accelerate its ESG performance in a way that attracts brands seeking proactive, values-aligned partners.

Mauritius is already perceived as politically stable and comparatively low risk. A rare and valuable quality in the current sourcing environment. Combined with its compliance credentials, this provides a meaningful foundation from which to build a more differentiated market narrative. Sri Lanka's 'Garments Without Guilt' campaign (EDB Sri Lanka, 2015), demonstrated that a sourcing destination can move beyond compliance and reframe itself around values-led production altogether. A similar long-term ambition is available to Mauritius. This is not a quick marketing repositioning, but an opportunity to build the foundations of something more distinctive: not merely a nearshoring option, but a governance-secure sourcing destination with a credible claim to being Africa's leading ESG apparel partner. For brands whose sourcing decisions are shaped by reputation as much as by price, that distinction carries real weight.

3.7 Industry Architecture

3.7.1 Vertical Integration

UK buyers acknowledged that Mauritius has made meaningful progress up the apparel value chain, with increasing vertical integration reflecting a maturing manufacturing base. However, buyers were measured in their assessment, noting that the sector is not yet "on par with Vietnam and India" in terms of overall production, sophistication and scale.

This progress is further tempered by structural constraints with Mauritius' limited domestic raw material capacity. UK buyers are aware that the sector relies heavily on importing fabrics and yarn, predominantly from markets such as India, and shared the implication this can carry. Buyers highlighted extended lead times as "they were getting fabrics from India", citing the consequence that "commitment times we had to put down on yarn because it was coming from India were really long". This dependency reduces flexibility and elongates supply chains, making Mauritius a less viable option for buyers operating in fast or ultra-fast fashion segments where speed and agility are paramount.

Buyers also drew instructive comparisons with how competing sourcing destinations are strategically addressing similar vulnerabilities. The Vietnam-Korea Free Trade Agreement (VKFTA) was cited by a number of buyers as a notable example. The VKFTA agreement enables Vietnamese manufacturers to procure raw materials from Korea at reduced cost and with shorter lead times, directly enhancing their competitiveness. Critically, buyers were largely unaware of equivalent agreements that might support or strengthen Mauritius' raw material position. This represents both a capability gap and a communication opportunity. If comparable arrangements exist or are in development, they are not reaching the UK buyer community.

'UK buyers acknowledged that Mauritius has made meaningful progress up the apparel value chain'

3.7.2 Labour

Mauritius' reliance on a migrant workforce is well known among UK buyers, with one noting it as a "limited workforce" filled predominantly by migrant labour. This in itself is not uncommon across global apparel manufacturing, but recent cases of reported misconduct and scrutiny over the treatment of migrant workers have introduced reputational risk that buyers are monitoring. As noted previously, transparent and demonstrable corrective action is what buyers look for and this applies equally here. The sector's handling of labour welfare issues will be a factor in how it is perceived by UK brands.

3.7.3 Modernisation

On production infrastructure, buyers noted that Mauritius is "not as streamlined" as some competing markets. Morocco was frequently cited as a benchmark, where purpose-built factories have been designed from the ground up to meet the demands of today's apparel sector. By contrast, Mauritius was not percieved as a market that has meaningfully invested in manufacturing modernisation - a gap that buyers view as increasingly consequential given the growing weight they place on energy efficiency, modern equipment, and wastewater management in their sourcing decisions - criteria that reflect the broader convergence of operational efficiency and ESG expectations.

This points to a broader imperative. To remain competitive and attractive to the next generation of UK buyers, Mauritius must accelerate its transition towards a knowledge-led, technology-enabled manufacturing base. Investment in digitalisation, automation, and AI-driven production, aligned with Industry 4.0 principles, is not a long-term aspiration but a commercial necessity. This requires coordinated commitment from all industry players, with the Government of Mauritius playing a central role in driving and incentivising modernisation across the factory base. Markets that fail to invest in this transition risk being left behind as buyer expectations continue to evolve.

4. Conclusion

Key Takeaways

- **Perception** - For UK buyers who know Mauritius, they respect the industry for its quality and stability - its base credentials are not in question.
- **Barrier** - Yet it remains on the periphery of active sourcing strategies, held back not by what it produces but by limited visibility and absent engagement.
- **Requirement** - Structural constraints around raw materials, labour, and manufacturing modernisation must be addressed to remain competitive as buyer expectations evolve. With a short term focus on strengthening the brand storytelling and visibility.
- **Opportunity** - The diversification window is open and buyers are looking. The priority now is ensuring Mauritius is present, discoverable, and ready to convert interest into orders.

Recommendations

The findings of this report point to a clear and actionable agenda. The following recommended actions look to drive the operational and structural changes needed to convert buyer interest into active sourcing relationships:

1. **Mapping UK engagement opportunities** and ensuring presence of Mauritian suppliers at UK trade shows, industry conferences, and speaking platforms where Mauritius can be represented and its apparel offering brought to the attention of UK buyers.
2. **Working with factories and government to design an ESG and regulatory alignment roadmap**, as a long-term positioning for Mauritius as a proactive leader on sustainability rather than a regulation follower.
3. **Driving investment into factory capacity**, supporting modernisation and capability development to ensure Mauritius can position itself as a competitive, knowledge-based industry to UK buyers.
4. **Producing a comprehensive, buyer-facing capabilities guide**, a resource featuring factory profiles, imagery, production specialisms, certifications, lead times, capacity information, and direct contact details. To reduce the research burden on UK buyers, enhance discoverability, and present the Mauritian sector as accessible, and market ready.
5. **Engaging with UK apparel associations** to introduce and communicate the Mauritian sector's capabilities, ensuring Mauritius features in industry conversations and sourcing discussions at an associational level.