Germany: Europe’s Logistics Hub
21 Crossroads Accelerating your Business
The efficient mobility of people and goods is a prerequisite for modern economic success. In the face of increasing globalization, the transportation of freight and logistics plays an ever important role in a country’s ability to compete in the global marketplace.

Ranked No. 1 by the World Bank’s 2010 Logistics Performance Index, Germany is Europe’s largest logistics market with over EUR 200 billion in annual revenue and the leader in logistics innovation, technology and services.

Germany is the world’s second largest exporting nation and the third biggest importer of goods. As the world’s fourth largest economy, it also offers optimal access to the EU’s 500 million consumers due to its central geographic position in the European Union.

Current forecasts predict that the logistics industry, Germany’s third largest sector after the wholesale and retail trade and the automotive industry, will continue to increase its role as an important employment driver over the coming years. Moreover, Germany’s Federal Government is committed to a transport policy that focuses not only on the economic strength and the social interests of stakeholders, but also on the ecological impact of transportation.

Combating climate change and promoting mobility is not a contradiction in terms, but complementary with a long-standing tradition in Germany. By systematically continuing efforts to achieve a further reduction of CO2 emissions, German transport policy makers continue to make major contributions towards the achievement of the nation’s ambitious climate change objectives.

We are pleased to highlight the abundant variety that Germany’s logistics landscape offers investors. By presenting the individual regions of logistics excellence in Germany, this brochure will assist interested commercial enterprises to select top locations. Customized logistics solutions made in Germany ensure a sustainable and competitive position in international competition.

Michael Pfeiffer
Chief Executive
Europe’s Logistics Hub

Germany is at the core of the European Union. Bordering nine European countries, Germany is the continent’s commercial hub, the crossroads where all trans-European paths meet. This location gained significance with the European Union’s eastward expansion in 2004. Once Romania and Bulgaria joined at the beginning of 2007, the geographic center of the European Union shifted 115 kilometers east to Meerholz, Hessen, located 42 km east of Frankfurt/Main. Currently, nearly half of the EU’s 500 million people live within 500 kilometers of Germany’s borders.

More goods pass through Germany than through any other country in Europe. In the north, Germany’s seaports are an important conduit for trade with the United Kingdom, Scandinavia and the Baltic States. In addition, road and rail links through the Jutland Peninsula provide easy access to Denmark and the rest of Scandinavia. In the west, an extensive network of roads, rail links and inland waterways feeds into France and the Benelux countries of Belgium, the Netherlands and Luxemburg. In the south, Germany has strong commercial ties with Switzerland and Austria and direct road, rail and water links with the Balkan states. Turning eastwards, Germany’s borders with Poland and the Czech Republic also bring Slovenia, Slovakia and Hungary within easy reach and make the more distant markets in Greece, Turkey, Ukraine and Russia accessible.

Europe’s Leading Economy

The German economy is the world’s fourth largest after the United States, China and Japan. Generating EUR 2.4 trillion worth of goods and services annually, Germany easily outstrips its European neighbors. Foreign direct investment (FDI) is also among the highest in Europe and Germany is the second largest exporter of goods worldwide just behind China.

With over 82 million inhabitants, Germany accounts for 16 percent of the EU’s total population. It has more consumers and therefore more consumer spending power than any other country in the European Union, accounting for 20 percent of the EU’s total GDP. Germany’s high educational standards and strong vocational training tradition also generate a reliable flow of skilled and adaptable workers for its large labor pool.

Germany has more than 390 colleges and universities, 184 of which are universities of applied sciences, as well as several world-renowned research organizations. Combined, they offer a dense network of knowledge that provides a strong economic stimulus for cutting-edge research and innovation. Germany is also a leader in new patent registration and one of the world’s most prolific sources of scientific publications.

GDP and Population 2009

<table>
<thead>
<tr>
<th>Country</th>
<th>GDP (EUR billion)</th>
<th>Share of total GDP (EU 27)</th>
<th>Population (million)</th>
<th>Share of total population (EU 27)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Germany</td>
<td>2,407</td>
<td>20%</td>
<td>82</td>
<td>16%</td>
</tr>
<tr>
<td>France</td>
<td>1,943</td>
<td>16%</td>
<td>64</td>
<td>13%</td>
</tr>
<tr>
<td>UK</td>
<td>1,527</td>
<td>13%</td>
<td>62</td>
<td>12%</td>
</tr>
<tr>
<td>Spain</td>
<td>1,051</td>
<td>9%</td>
<td>46</td>
<td>9%</td>
</tr>
<tr>
<td>Netherlands</td>
<td>570</td>
<td>5%</td>
<td>16</td>
<td>3%</td>
</tr>
<tr>
<td>Poland</td>
<td>310</td>
<td>3%</td>
<td>38</td>
<td>8%</td>
</tr>
<tr>
<td>Czech Republic</td>
<td>135</td>
<td>1%</td>
<td>10</td>
<td>2%</td>
</tr>
<tr>
<td>Slovak Republic</td>
<td>63</td>
<td>1%</td>
<td>5</td>
<td>1%</td>
</tr>
<tr>
<td>EU 27</td>
<td>11,806</td>
<td></td>
<td>500</td>
<td></td>
</tr>
<tr>
<td>Eurozone</td>
<td>8,979</td>
<td></td>
<td>329</td>
<td></td>
</tr>
<tr>
<td>USA</td>
<td>10,221</td>
<td></td>
<td>309</td>
<td></td>
</tr>
<tr>
<td>Japan</td>
<td>3,638</td>
<td></td>
<td>128</td>
<td></td>
</tr>
</tbody>
</table>

Note: France & Czech Rep. GDP data are forecasts.
Germany is one of the main beneficiaries of globalization. As in recent years, in 2009 Germany’s most important trading partner is the European Union. Within the EU, the Netherlands and France top the list as Germany’s most important importing and exporting partner respectively. In terms of exports, the USA ranked third place, down one notch as compared with 2008. As for imports, China ranked second place overtaking France for the first time.

In terms of goods, machinery and transport equipment including automobiles, followed by chemical products were Germany’s top exports. Electrical and optical equipment including computers followed by transport equipment and machinery ranked the highest among Germany’s imported goods.

As a sign of Germany’s continued economic strength, the outlook for 2010 is very positive. Comparing the month of June 2010 with the previous year, statistics from the German government show an export increase of 28.5 percent and an import increase of 31.7 percent; the latter being the highest jump ever recorded in Germany since 1950.

### Trade with Germany (EUR billion/2009*)

<table>
<thead>
<tr>
<th>Country</th>
<th>Import</th>
<th>Export</th>
</tr>
</thead>
<tbody>
<tr>
<td>France</td>
<td>55</td>
<td>82</td>
</tr>
<tr>
<td>Netherlands</td>
<td>38</td>
<td>58</td>
</tr>
<tr>
<td>USA</td>
<td>40</td>
<td>53</td>
</tr>
<tr>
<td>China</td>
<td>36</td>
<td>55</td>
</tr>
<tr>
<td>Italy</td>
<td>40</td>
<td>51</td>
</tr>
<tr>
<td>UK</td>
<td>33</td>
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</tr>
<tr>
<td>Austria</td>
<td>29</td>
<td>48</td>
</tr>
<tr>
<td>Belgium</td>
<td>29</td>
<td>42</td>
</tr>
<tr>
<td>Switzerland</td>
<td>28</td>
<td>35</td>
</tr>
<tr>
<td>Poland</td>
<td>23</td>
<td>32</td>
</tr>
<tr>
<td>Czech Republic</td>
<td>25</td>
<td>23</td>
</tr>
</tbody>
</table>

* Preliminary data. Source: Federal Statistical Office (Destatis) 2010

### Germany as a Global Springboard

**Old Geographical Center in EU 15**

**New Geographical Center in EU 27**

**Best in Class**

**Second or Regional Best**

**Middle Ranking**

**Last in Line**

The European Union’s eastward shift has given Germany’s logistics sector a significant boost. In the run-up to the EU’s first major expansion in 2004, Ernst & Young’s annual European Attractiveness Survey found that “proximity to customers and suppliers/sources” made Germany the most attractive location for distribution centers serving all of Europe. That conclusion was confirmed in their 2006 annual report: “Once again our survey demonstrates Germany’s gain from the overall eastward expansion of the logistics market.”

Proximity is not the only advantage Germany enjoys in the logistics field. Germany has some of Europe’s most advanced transportation networks, with both road and rail densities double the EU average.

A large well-trained workforce, plus a stable political and economic environment are also important factors. Together they make Germany the best possible base for both European and global logistics operations. This was confirmed once again by the World Bank’s 2010 Logistics Performance Index, where Germany received the highest score, taking first place out of 155 countries.
Germany's turnover from logistics in 2008 significantly outstripped its nearest EU competitors, France and the UK by nearly 90 percent, an amount nearly equal to their combined respective turnovers. (See chart below). The Fraunhofer Institute's Top 100 in European Transport and Logistics reports that Germany accounts for over EUR 218 billion or 23 percent of the EUR 930 billion spent on logistics services in the "EU 29."*

Of the ten major logistic sub-market segments in the "EU 29," German companies lead in seven. With a turnover of EUR 374 billion and a 40 percent industry share, contract logistics is by far the largest sub-market segment. Deutsche Post DHL is not only the leader in Europe, but the largest contract logistics provider worldwide. With around EUR 14 billion in contract logistics revenue globally and over EUR 9 billion in Europe alone, Deutsche Post DHL outstrips its nearest competitor by over three-fold.

Germany's leading global logistics players include the Deutsche Bahn Group, which ranks No. 1 in bulk logistics and also holds first place in Europe's general truckload segment. Ranking second in the specialized transportation segment is Kraftverkehr/Nagel, while Deutsche Post ranks No. 1 in the courier, express and parcel services (CEP) segment.

Despite the economic downturn of late 2008, in which international transportation and industrially oriented submarkets were particularly hard hit – most notably ocean and air freight with 13 percent and 10 percent respective losses in 2009 – experts forecast a positive recovery. As a result, the Fraunhofer Institute's "most likely" scenario predicts Germany's logistics revenue to decrease by six percent to EUR 205 billion in 2009 and increase to EUR 208 billion by the end of 2010.

With a turnover of just over EUR 218 billion in 2008 and an absolute transport volume of roughly 3.6 billion tons, no other EU country comes close to Germany's market size. This is not only a result of Germany's economic might and the country's clout as Europe's most populous nation. The fact remains that a relatively large share of the economy is based on industry and trade. Moreover, the importance of Germany's central geographic location in an expanded European market is not only a significant benefit for logistic service providers, but is also a driving force of the nation's logistics market. As a result, Germany's logistics industry accounts for 8.8 percent of its GDP, which is significantly higher than the European average of 7.1 percent.

Although the top 10 logistic service providers in Germany are dominated by international companies, most of them have German roots. Deutsche Bahn, with its subsidiaries DB Schenker Rail and DB Logistics, ranks first followed by Deutsche Post DHL. The companies Kühne + Nagel, Dachser and Rhenus comprise the top 5. The top ten's total turnover is EUR 29 billion or 13 percent of the total logistics market volume.

* i.e. the European Union plus Norway and Switzerland.
Germany’s Logistics Landscape

The country’s logistics workforce is geographically concentrated along the Rhineland, through the industrial heartland of the Ruhr, to the North Sea and Baltic ports. This matches the high volume of traffic to and from the Benelux countries and the UK in the west, and Scandinavia and the Baltic States in the north.

This concentration intersects another area running south through Hessen into Bavaria and Baden-Württemberg. It is also especially high in the Frankfurt/Main area, around Ulm and in the stretch between Munich and Ingolstadt. The north Baden region is well-situated to handle traffic to and from France and southwestern Europe; Bavaria is ideally located along the routes to Austria, Switzerland, Italy and southeastern Europe.

Finally, the EU’s eastern expansion has given logistics in the eastern state of Brandenburg a significant economic boost. This is characterized by the high density logistics cluster south of Berlin, which extends up to the Polish border.

Based on the first quarter 2010 statistics, the average annual gross salary of an employee in Germany’s logistics sector was EUR 32,520. Compared with the 2007 average annual salary of EUR 33,116 and the increase in the nation’s productivity, this amounts to a noteworthy decrease in real salaries in Germany’s logistics sectors.

Labor’s Competitive Edge

There are approximately 60,000 companies in Germany’s logistics sector, employing almost 2.7 million individuals or roughly 7 percent of the total workforce. Analysts predict that logistics-related employment could expand by as much as 20 percent over the next decade. Detthold Aden, head of the BLG Logistics Group, has identified logistics as the only major sector still creating jobs.

The vast majority of the German workforce has received practical or vocational training and a large proportion has completed higher education. Ninety-five percent of workers in Germany have at least basic foreign language skills, which is a great advantage to companies with international operations. Contrary to expectations, this does not make German workers more expensive than workers in other EU countries.
Germany’s Logistics Regions

- Bremen-Weser Region
- Hamburg Metropolitan Region
- Rostock Region
- Münster/Osnabrück
- Rhine-Ruhr Region
- Hannover/Braunschweig
- Magdeburg
- Berlin/Brandenburg
- Saxonian Triangle
- Nordhessen
- Thuringia
- Rhine/Main Region
- Rhine-Neckar Region
- Stuttgart/Heilbronn
- Saarland
- Hahn/Trier
- Nuremberg/Upper Franconia
- Freiburg/Lörrach Region
- Ulm
- Danube Region
- Munich

Germany’s advantages as a European logistics hub have been established. Germany’s logistics industry has outstanding infrastructure, a wide knowledge base and a variety of locations and facilities, making it an optimal choice for investors seeking to meet their logistics needs.

Based on the expert analysis of the company Visality and the Fraunhofer ATL Institute in Nuremberg, twenty-one German logistics clusters have been identified. These regions have extensive intermodal infrastructures, and the logistics service providers’ in-depth knowledge allows for a wide variety of services and offers a highly motivated and qualified logistics workforce. In addition, these regions provide higher education logistics training, where young professionals can improve their logistics expertise.

It is impossible to include all the components of Germany’s expansive logistics landscape. Germany has a very high autobahn density (Auto-bahn-km per 1,000 street-km), excellent rail networks and waterways, an extensive network of freight villages and intermodal facilities (rail-road, water-road, water-rail-road equipped with rolling road terminals), airports, seaports and inland ports.

The following pages depart from this larger industrial focus, and concentrate instead on the infrastructure and highlights of the twenty-one chosen regions.

Depicting Germany’s extensive logistics field without reducing its complexity means making balanced choices about what to include. For example, Germany has over 250 inland ports that can be used by third parties. Our map of Germany contains twenty-one logistics regions, but only one fourth of the inland ports, those with regional significance, are marked. Our entire portrait of Germany represents only a fraction of the country’s extensive logistics locations, focusing on the airports, seaports, locations with intermodal facilities, highways, railways and railroad yards.

By collaborating with these twenty-one regions, it was possible to combine detailed information about the micro level logistics highlights and facilities to allow for regional analysis and comparison, while maintaining the macro view of Germany as a logistics location. We are pleased to present in the following pages the twenty-one ideal locations for your investment.
Bremen-Weser Region

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NGlobal
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Dr. Lutz Hoffmann
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lutz.hoffmann@nglobal.de
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Infrastructure
Major Railways
A1, A27, A28, A29
Airports
Bremerhaven, Nordenham
Inland Ports
Bremen, Bremerhaven, Nordenham
Seaports
Cuxhaven
Rail Freight Hubs
Brake

Logistics Service Providers
BLS Logistics Group AG & Co.;
Eurogate GmbH & Co. KG a.A.;
Feige Deutschland Schiffung &
Co. KG; DHL GmbH; Kuesterling
Holding GmbH; Beluga Shipping
GmbH; DB Schenker; Hellmann
Worldwide Logistics GmbH;
Kühne + Nagel (AG & Co.) KG;
Rhenus Midgard GmbH & Co. KG;
J. Müller Breakbulk Terminal
GmbH & Co. KG

Population
2.8 m
Logistics Workforce
96,000 employees = 8.4%*

Industries
Automotive industry; Trade and
commerce; Aerospace industry;
Food and beverage industry;
Energy and chemical industry;
Breakbulk logistics

Institutions of Higher Education
• Bremerhaven University of
Applied Science
• DAV German Academy of
Foreign Trade and Transport
• University of Bremen
• ISL Institute of Shipping
Economics and Logistics
• Bremer Institute of Industrial
Technology and Applied Work
Science (BIBA)
• Universities of Applied Sciences
Oldenburg, Osnabrueck,
Wilhelmshaven
• University of Oldenburg
• Jacobs University of Bremen

Highlights of Logistics Region
World renowned for its ports and extensive transportation infrastructure, the Bremen-Weser region offers ideal conditions for logistics operations. Home to top global logistics service providers, the region is a leader in the handling, warehousing and transfer of goods. Extensive logistics research facilities, customized solutions and a long record of providing transportation services has made the Bremen-Weser region one of the top logistics locations worldwide.

Bremerhaven, Europe’s largest container terminal of 5 km quay length specializes in the transshipment of containers, vehicles and fruit, while Bremen concentrates on bulk goods and conventional general cargo. The other ports in the region, including Cuxhaven, Nordenham and Wilhelmshaven (JadeWeserPort, Germany’s new deep-sea container terminal which will start operation in 2011), are also first-class intermodal locations and are fully integrated into the region’s high-capacity infrastructure.

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* % of working population
Hamburg Metropolitan Region

Highlights of Logistics Region

The Hamburg metropolitan region is one of the world’s leading logistics centers. Many companies choose it for their freight handling, distribution and logistics services because of its proximity to the markets of central, northern, and eastern Europe, and the broad range of expertise available here. Multi-national companies can count on the support of specialists in just about any field to run their world-wide logistics networks.

The ports of the Hamburg metropolitan region, Lübeck and Kiel, all benefit from their central position at the heart of Europe’s logistical flow of goods and act as a global hub for the fast growing markets in Asia and eastern Europe. Two out of three containers in Germany start their journeys here. The region is also characterized by its unique location between two seas, its beautiful scenery and tourist attractions, and a wide range of cultural events.

Infrastructure

Major Railways

Thanks to its efficient network of highways, Hamburg has the highest growth rates for freight transport in all of Germany.

Airports

Hamburg, Lübeck

Seaports and Inland Ports

Hamburg

Lübeck

Kiel

Brunsbüttel

Stade-Elbe-Flughafen

Cuxhaven

Lüneburg

Rail Freight Hubs

Billwerder Moorfleet

Hamburg/Maschen

Meinersdorf

Stade-Brunshausen

Freight Villages (GVZ)

Hamburg Altenwerder, Lübeck

Population

4.5 m

Logistics Workforce

350,000 employees = 8%*

Industries

Logistics/harbor, Maritime industries; Research & development; Aerospace; Chemical industries; Media IT and telecommunications; Life science; Health care; Nutrition; Automotive industry & mechanical engineering

Contact

Logistics Initiative Hamburg

HWF Hamburg Business Development Corporation

Dr. Jürgen Glaser

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Institutions of Higher Education

A large pool of skilled staff with a wide range of qualifications is an essential location factor for logistics companies in the Hamburg metropolitan region and Lübeck and Kiel. To guarantee the future supply of dedicated and qualified staff, the region is investing in logistics-related training courses and qualifications and has set up an array of demand-oriented projects. More than 20 institutions offer a comprehensive range of courses at all levels, from vocational training to further education and university studies. The resulting wealth of well-trained workers makes a significant contribution to the competitiveness of companies located in the region.

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Rostock Region

State-of-the-art infrastructure and high quality, flexible service are the main characteristics of the Rostock logistics hub. Its strategic location makes it a turnstile for business with the Baltic states, Scandinavia and the rest of Europe.

It has a seaport with more than 140 ferry and cruise departures a week, as well as fishing and cargo ports. A busy airport and excellent road and rail links with western and southern Europe also make it an ideal intermodal location.

This means that logistic companies based in the region benefit not only from its first-class facilities, but that market proximity and ease of movement also cut transport and distribution costs.

Infrastructure
- Direct access to highway networks: highway A19 & A20 cross southerly
- Intermodal terminals, freight villages, marshallings yards
- Major transport routes to various destinations
- City of four ports: sea port, fishery port, airport, cruise port
- Port of Rostock
  - Deep sea port (depth: 14.5 m), quay length > 9,000 m + 43 berths, cargo: roll-on/roll-off, break-bulk, bulk cargo, chemicals
- Fishery Port
  - Quay length 2,100 m, refrigerated and other storage facilities, mobile crane, goods: break-bulk, bulk cargo, chemicals
- Airport
  - Scheduled and charter flights, cargo facilities, 169,098 passengers, international destinations
- Cruise Port
  - New terminal opened, international cruise lines

Logistics Service Providers
- DB Schenker
- Hapag-Lloyd
- DB Schenker Rail
- Spedition Gustke
- Baltic Lloyd
- Shipping Companies
  - Deutsche Seereederei
  - Scandlines
  - TT Line
  - Reederei Interhansa
  - Reederei F. Laeisz

Population
500,000

Logistics Workforce
5,500 employees = 5.8%*

Institutions of Higher Education
- Logistics has close traditional links with the city of Rostock, which has been a leader in freight transport for centuries. The University of Rostock (www.uni-rostock.de) has a close working relationship with logistics companies and fosters an extensive program of research and development. Several institutes are also involved in logistics-related research and teaching:
  - Institute of Transportation & Logistics (www.uni-rostock.de/-verkehr)
  - Baltic Institute for Marketing, Traffic and Tourism (www.iort.de)
  - Faculty of Factory Systems and Materials Handling (www.fms.uni-rostock.de/)
  - Navigation School (www.sf.hs-wismar.de)

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Highlights of Logistics Region
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* % of working population

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  - Navigation School (www.sf.hs-wismar.de)

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* % of working population
### Highlights of Logistics Region

A large number of leading logistics providers are located in the triangle formed by the important A1, A30, A33, A43 highways. Offering comprehensive, tailor-made logistics services, they operate both nationally and internationally. Their customer-oriented packages include warehousing and other logistics-related services such as e-commerce solutions.

Furthermore, access and proximity to both end customers and company locations have convinced many large manufacturing companies from other sectors to establish national and international logistics operations here. Some of Germany’s top companies are represented here; many of them maintain a dense network of branches throughout the country and are linked with both European and global hubs either directly or via partners. These networks make 24-hour operations in the region possible, rendering it an ideal location for both German and European-wide distribution.

### Institutions of Higher Education

- Münster: Westfälische Wilhelms University and the College for Applied Science with the Institute for Logistics and Facility Management which offers a Master’s degree in Logistics
- Osnabrück: University and College for Applied Science with the Department of Logistics
- LOGIS.NET Competence Center
- German Institute for Food Technology

### Logistics Service Providers

- Fiege Group; Hellmann Worldwide Logistics; Meyer & Meyer International Haulage; Werner Egeland Automobile Logistics; Heinrich Koch International Haulage, DBDS; Sostmeier Shipping and Logistics; Overnight Deep-frozen Services (Copenhagen & Wiese); Dachser; Nagel Transport; DPD; Rosenbaum Fruit Logistics; Alfons Greiwig; DHL/HSE24; FMO Cargo services; LIS; Kühn Refrigeration Logistics

### Population

4.3 m

### Logistics Workforce

67,000 employees = 7.8%* 

### Industries

- Automotive industry
- Trading
- Foodstuffs
- Pharmaceuticals
- Steel and metal production
- Engineering
- Furniture
- Paper and packaging
- Animal feed
- Agricultural seeds

* % of working population
Rhine-Ruhr Region

**Infrastructure**

**Major Railways**
Important European highways like E35 from Amsterdam to Rome and E40 linking Calais with eastern Europe cross the Rhine-Ruhr region. The Düsseldorf International Airport is Germany’s third ranking air cargo center and the Düsseldorf International Airport is third in passenger transport.

**Inland Ports**
A network of waterways connects the Rhine-Ruhr region with the seaports of Rotterdam and Antwerp, with the North Sea, the Baltic and the Black Sea. Duisburg is Europe’s largest inland port.

**Rail Freight Hubs**
Rhine-Ruhr region offers the densest railway network in Germany and is an important hub in the European high-speed rail network. Freight Villages (GVZ) are based in Duisburg, Herne, and Cologne.

**Airports**

**Seaports**

**Inland Ports**

**Navigable Waterways**

**Major Railways**

**Major Autobahns**

**National Borders**

**Location with Intermodal Terminal (KV)**
Symbol size reflects size of hub.

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www.logistik.nrw.de

**Logistics Service Providers**
Deutsche Post World Net – DHL; DB Schenker; United Parcel Service Germany; Rhenus Logistics Germany; Fiege Group Germany; MGL Metro Group Logistics; Imperial Logistics International; Arrato Logistics Services; Nagel Group; HAVI Logistics; TNT Express; NYK Logistics Germany

**Population**
9.1 m

**Logistics Workforce**
280,000 employees = 7%*

**Industries**
Automotive industry; Chemical industry; Food processing; IT & software; Mechanical engineering; Pharmaceuticals; Steel industry; Trade

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**Highlights of Logistics Region**
North Rhine-Westphalia (NRW) is situated at the economic heart of Europe. With over nine million inhabitants, the Rhine-Ruhr region is Germany’s most important marketplace. It has the highest highway and rail density in Europe, bringing over 40% of the EU’s population – and therefore nearly half of its purchasing power – to within a day’s reach! State-of-the-art traffic guidance systems such as the “Ruhrpilot” help to ensure an optimal use of the existing traffic infrastructure.

Nine of Europe’s TOP 100 logistics companies are located in North Rhine-Westphalia. Some 24,000 logistic companies employ approximately 260,000 people, a figure which climbs to 600,000 when logistics staff from non-logistics companies is included. The Rhine-Ruhr region has enormous potential as a logistics hub, especially for European distribution center projects.

**Institutions of Higher Education**
Research and development is an important feature of the North Rhine-Westphalia logistics region. Over twenty universities offer logistics-related courses and many institutes are working on innovative logistics solutions. Europe’s leading logistics institute, the Fraunhofer Institut für Materialfluss und Logistik (IML) is based in Dortmund and advises companies in all industrial sectors. North Rhine-Westphalia also plays a pioneering role in the development of RFID technology to optimize logistic processes.

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* % of working population
Hannover/Braunschweig

Hannover/Braunschweig is a leading economic and logistics location in northern Germany. Its central position gives it access to all the relevant markets in both Germany and Europe and its diversified industrial base, with its strong orientation towards exports, makes it attractive for logistics services. As a result, all the major logistics providers have a presence here.

Further location factors characteristic of the Hannover-Braunschweig region:

- Optimal position at the intersection of main European routes
- Multimodality: integrated traffic and transport connections to all providers
- Best conditions for seaport hinterland hub
- All the necessary logistical expertise available
- Ideal location for distribution centers, with excellent cut-off times

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Highlights of Logistics Region

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- Best conditions for seaport hinterland hub
- All the necessary logistical expertise available
- Ideal location for distribution centers, with excellent cut-off times

Infrastructure

Major Autobahns
A2, A7, A27
Airports
Hannover
Braunschweig
Inland Ports
Hannover Port Authority
Peine-Salzgitter Transport Services
Braunschweig Port
Operating Company
Hildesheim
Rail Freight Hubs
Seele Marshalling Yard
Freight Villages (GVZ)
Hannover, Salzgitter, Wolfsburg
Intermodal Terminal (KV)
Hannover-Linden
Hannover-Leinstar
Nordhafen
Braunschweig
Mega-Hub in Lehrte (planned)

Population
3.2 m

Logistics Workforce
42,000 employees = 6.9%*

Industries
Automotive industry;
Chemical industries;
IT & software;
Engineering;
Pharmaceuticals

Logistics Service Providers
COTRANS LOGISTIC;
LEHNKERING Steel Transport and Services;
Ebeling International Haulage;
Huettemann Logistics;
DB Schenker;
Hellmann Worldwide Logistics;
Meyer & Meyer International Haulage;
Laabs Tank Logistic

Institutions of Higher Education
Leibniz University Hannover
IVE Institute of Transportation and Railways
PSTL (Department of Storage and Transport Systems Planning and Operation)
Braunschweig/Salzgitter Technical College
Braunschweig Technical University

* % of working population
Magdeburg is situated at the intersection of major east-west transport routes right in the heart of both Germany and Europe. This has allowed Magdeburg to establish itself as a central logistics site and a gateway for the fast-growing east-west trade. The port of Magdeburg is among the largest inland ports in Germany in terms of area, and is an ideal hinterland hub for the seaports on the North Sea and Baltic coasts.

State-of-the-art facilities at the new integrated multi-modal and container terminal in the Hansehafen Freight Village provide the basis for fast and efficient transfers among barge, rail and road. In addition, top research bodies such as the Fraunhofer Institute for Factory Operation and Automation IFF, with its Virtual Development and Training Center, offer valuable support for the improvement of products, production systems and services.
Berlin-Brandenburg has a promising future in logistics. Located between the central and eastern European emerging markets, with many inland harbors serving major German seaports, the region has a true competitive advantage in the logistics industry. Berlin-Brandenburg has a customer base of approximately 6 million people; within a day’s drive, the number of customers in the EU grows to 300 million. Berlin is at the hub of a vast European network of railways, roads, air routes and inland waterways. The capital region has freight stations and extensive industrial sites with easy access to major highways. Moreover, the region offers highly competitive commercial property and a labor force with above-average qualifications. One of the prime innovation and industry-related research areas in Europe, Berlin-Brandenburg has efficient and non-bureaucratic licensing procedures. The region also has one of the most modern transport management centers in Europe.

**Infrastructure**

- **Major Railways**
  - A2, A9, A10, A12, A13, A19, A24, A100, A111, A113, A115
  - Airport Berlin Brandenburg International (Schönefeld), Tegel

- **Inland Ports**
  - BEHALA; Brandenburg; Eisenhüttenstadt; Freight Village West Berlin; Königs Wusterhausen; and others

- **Freight Villages (GVZ)**
  - Södentin
  - Elsterwerda

- **Rail Freight Hubs**
  - GTTC Euro Transport & Trade Center

**Logistics Service Providers**

- DB Schenker
- Deutsche Post (DHL)
- Kühne & Nagel
- Dachser
- DPD
- UPS
- Rhenus
- Panalpina
- Gefco

**Industries**

- Automotive industry; Biotechnology; Electrical engineering; R&D; IT & Software; Mechanical engineering; Medical technology; Transportation system technology; Aviation; Geographical information systems (GIS) industry; Synthetics and chemical industries; Energy industry; Metal production, Development and processing, Mechatronics, Optics

**Population**

- 4.7 m
- 108,000 employees = 6.5%*

**Logistics Service Providers**

- DB Schenker
- Deutsche Post (DHL)
- Kühne & Nagel
- Dachser
- DPD
- UPS
- Rhenus
- Panalpina
- Gefco

**Institutions of Higher Education**

- Technical University Berlin (TU)
- Humboldt University Berlin
- Berlin Free University
- Brandenburg University of Technology
- Technical University for Technology and Business (HTW)
- Technical University of Wildau
- University of Business Berlin (FHW)
- Advanced Technical College Berlin (ITFH)
- Berlin University of Cooperative Education for Business Berlin
- Hasso Plattner Institute (SAP)
- Fraunhofer Institute for Manufacturing and Design Engineering
- Konrad-Zuse Center for Innovation Technologies Berlin (ZIB)
- Research and Operator Network for Transportation Technology Berlin

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**Highlights of Logistics Region**

- Berlin-Brandenburg has a promising future in logistics. Located between the central and eastern European emerging markets, with many inland harbors serving major German seaports, the region has a true competitive advantage in the logistics industry. Berlin-Brandenburg has a customer base of approximately 6 million people; within a day’s drive, the number of customers in the EU grows to 300 million. Berlin is at the hub of a vast European network of railways, roads, air routes and inland waterways. The capital region has freight stations and extensive industrial sites with easy access to major highways. Moreover, the region offers highly competitive commercial property and a labor force with above-average qualifications. One of the prime innovation and industry-related research areas in Europe, Berlin-Brandenburg has efficient and non-bureaucratic licensing procedures. The region also has one of the most modern transport management centers in Europe.
The EU’s eastern enlargement has made this region, which is known as the “Saxonian Triangle,” an optimal logistics location for Europe-wide distribution. Global player DHL chose Leipzig for its new European logistics hub, providing proof that the area is an outstanding central logistics location which functions as a vital bridge between western and eastern Europe.

Due to DHL’s operations, Leipzig/Halle is Europe’s fastest growing air cargo hub by far. The infrastructure, telecommunications and business environment in the Saxonian Triangle are among the most modern in the world. International airports at Dresden and Leipzig operate around the clock, the region’s highway systems and railway networks are both highly developed, and its location in the center of the large European markets, provide optimal conditions for logistics service providers. This favorable environment has turned the Saxonian Triangle into a logistics location par excellence, one that will help to get your business moving!

Logistics Service Providers
- DHL
- Quelle
- Kühne+Nagel
- Amazon
- DB Schenker
- Schnellliefe-Gruppe
- Finsterwalder
- Simon Hegele

Logistics Workforce
93,000 employees = 6.1%*

Institutions of Higher Education
- Dresden University of Technology
- Dresden International University
- Chemnitz University of Technology
- TU Bergakademie Freiberg
- West Saxony University of Applied Sciences of Zwickau
- University of Applied Sciences Mittweida
- Leipzig Graduate School of Management
- Leipzig University of Applied Sciences
- Martin-Luther-University Halle-Wittenberg
- University of Applied Sciences Merseburg
- Fraunhofer Institute for Transportation and Infrastructure Systems IVI in Dresden

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Highlights of Logistics Region
- The Saxonian Triangle is an optimal logistics location for Europe-wide distribution.
- DHL chose Leipzig for its new European logistics hub.
- The region offers a favorable environment for logistics service providers.
- Istanbul is well-connected by highway and railway networks.
- International airports at Dresden and Leipzig operate around the clock.
- The infrastructure is highly developed, and the location is central to large European markets.
- The region is an outstanding central logistics location.
- The favorable environment has turned the Saxonian Triangle into a logistics location par excellence.

Infrastructure
- Major Railways
- Major Autobahns
- Airports
- Seaports
- Inland Ports
- Rail Freight Hubs
- Freight Villages (GVZ)
- Location with Intermodal Terminal (KV)
- Symbol size reflects size of hub

Map: Germany Trade & Invest; Typoly (Inken Greisner)
Photo: PUNCTUM Photography

* % of working population

Saxonian Triangle

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*Further details and contact information can be added as needed.*

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*Map: Germany Trade & Invest; Photo: PUNCTUM Photography*
Europe’s Logistics Hub

National Borders
Major Railways
Major Autobahns
Navigable Waterways
Airports
Seaports
Inland Ports
Rail Freight Hubs
Freight Villages (GVZ)
Location with Intermodal Terminal (KV)
Symbol size reflects size of hub

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Highlights of Logistics Region
The European Union’s recent enlargement has transformed what was once just an excellent central location in Germany into one with even better access to other European markets. Thanks to the central location of this international hub and distribution center, Nordhessen can offer the very latest cut-off time for next-day deliveries.

The region is also strong in contract logistics, transport and automotive logistics. The Regionalmanagement NordHessen GmbH is a one-stop agency with contact to all regional key actors through its extensive networks.

Investors benefit from the quick provision of information and contacts and from their “top logistics areas” database of immediately available commercial sites suitable for large-scale investments.

Infrastructure
Major Autobahns
A4, A5, A7, A38, A44, A49
Airports
Kassel-Calden
Rail Freight Hubs
Malsfeld-Beiseförth
Korbach
Kassel
Philipsthal
Freight Villages (GVZ)
Kassel

Logistics Service Providers
Alfons Brass Logistik & Lagerei GmbH; BWG Reimer GmbH & Co. KG; DHL Express Vertr. GmbH & Co. OHG; GEODIS Deutschland GmbH; GO! General Overnight Service (Deutschland) GmbH; GLS General Logistics Systems Germany GmbH & Co. KG; Rudolph Logistik Gruppe; DB Schenker; Friedrich ZUFALL GmbH & Co. KG; Hermes Logistic Gruppe

Institutions of Higher Education
University of Kassel offers various logistics related degrees (www.uni-kassel.de).
University of Cooperative Education Nordhessen offers logistics related academic programs (www.ba-nordhessen.de).
UniKIMS – University of Kassel International Management School (www.unikims.de)

Population
1.1 m

Logistics Workforce
33,000 employees = 7.1%*

Industries
Full range of logistic related industries (distribution, contract, transport, automotive industry, metal working industry, solar industry)

* % of working population

Institutions of Higher Education

Prague, Vienna

Munich, Milan

Belgium

Frankfurt/Main

Rotterdam

Hamburg, Copenhagen

Berlin

Highlights of Logistics Region

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Infrastructure

Major Autobahns

A4, A5, A7, A38, A44, A49

Airports

Kassel-Calden

Rail Freight Hubs

Malsfeld-Beiseförth

Korbach

Kassel

Philipsthal

Freight Villages (GVZ)

Kassel

Logistics Service Providers

Alfons Brass Logistik & Lagerei GmbH; BWG Reimer GmbH & Co. KG; DHL Express Vertr. GmbH & Co. OHG; GEODIS Deutschland GmbH; GO! General Overnight Service (Deutschland) GmbH; GLS General Logistics Systems Germany GmbH & Co. KG; Rudolph Logistik Gruppe; DB Schenker; Friedrich ZUFALL GmbH & Co. KG; Hermes Logistic Gruppe

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UniKIMS – University of Kassel International Management School (www.unikims.de)

Population

1.1 m

Logistics Workforce

33,000 employees = 7.1%*

Industries

Full range of logistic related industries (distribution, contract, transport, automotive industry, metal working industry, solar industry)

* % of working population

Institutions of Higher Education

Prague, Vienna

Munich, Milan

Belgium

Frankfurt/Main

Rotterdam

Hamburg, Copenhagen

Berlin
Highlights of Logistics Region

Thanks to its central location and highly advanced transportation infrastructure, Thuringia ranks among Europe’s most prized logistics regions. More than 160 million consumers live within a radius of about 500 km. Moderate wage costs, modern working regimes and a highly trained workforce are just some of the state’s advantages as a logistics location. Thuringia is particularly strong in business and industrial logistics, distribution and third-party logistics.

Thuringia is Europe’s central transportation hub. The A4 and A38 autobahns cut across the region from west to east, while the A71/A73 and A9 run north-south. An important rail link between Paris, Frankfurt and Berlin passes through the state. Freight is dispatched from the TNT air hub at Erfurt airport to destinations all over the world. Thuringia has all it takes to be a modern logistics location.

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Infrastructures

Infrastructure

Major Autobahns
A4, A71, A9, A73, A38
Airports
Erfurt
Rail Freight Hubs
Eisenach
Munich-Nuremberg-Erfurt-Berlin ICE line (under construction) – TEN
Paris-Frankfurt/M.-Erfurt-Berlin-Warsaw-Moscow ICE line

Freight Villages (GVZ)
Erfurt

Logistics Service Providers

TNT-Express;
BLG Logistics Group;
Wincanton Trans European;
DB Schenker;
Panopa Logistics;
DHL;
Kühne + Nagel International;
Dachser Logistics;
Nagel Group;
Axthelm + Zufall Logistics;
TSG Global Logistics

Population

1 m

Logistics Workforce

19,500 employees = 6.3%*

Industries

Automotive industry;
Electrical engineering/electronics;
Solar industry;
Mechanical engineering

Institutions of Higher Education

More than 50,000 students are currently enrolled in Thuringia’s 11 universities and colleges. Thuringia is home to well-known research institutions and an international high school.

- Ilmenau University of Technology
- Friedrich Schiller University at Jena
- Bauhaus University at Weimar
- Erfurt University
- Franz Liszt College of Music at Weimar
- Erfurt University of Applied Sciences
- Jena University of Applied Sciences
- Nordhausen University of Applied Sciences
- Schmalkalden University of Applied Sciences
- Gotha College
- Three college-level institutions combining professional education with field-based training in engineering, logistics and business.

* % of working population
The Rhine-Main region is a major logistics hub in Europe. It includes Frankfurt, Mainz, Rhineland-Palatinate, and Hesse. The region offers excellent access to all European markets through its tri-modal container terminal at Aschaffenburg and the trans-European Rhine-Main-Danube canal.

### Highlights of Logistics Region

- **Logistics Workforce**: 145,000 employees = 6.6%*
- **Industries**: Automotive industry, Chemical industry, Electrical engineering, Research and development (R&D), Fine mechanics, Glassware, IT & Software, Aerospace industry, Metal production and working steel, Industry and mechanical engineering, Pharmaceutical industry, Textile and clothing industry

### Infrastructure

- **Major Railways**: A2, A3, A45, A66, A67
- **Airports**: Frankfurt/Main
- **Inland Ports**: Aschaffenburg, Mainz-Ahrtal, Worms Harbor, Ludwigshafen, Rüsselsheim, Darmstadt, Offenbach, Hanau
- **Rail Freight Hubs**: Frankfurt-Ost, Mainz-Bischheim, Rüsselsheim
- **Navigable Waterways**: Main, Neckar, Rhine

### Logistics Service Providers

- Deutsche Ursprungslogistik (www.dulh.de)
- DPD GmbH & Co. KG
- Kühne+Nagel
- DB Schenker
- Lufthansa Cargo AG
- Panalpina
- DHL
- Schiener-Straße mbH
- SCM Distributionszentrum
- Logwin
- Logistikservice Offenbach GmbH & Co.
- Logistikservice Offenbach GmbH & Co.

### Institutions of Higher Education

- Darmstadt University of Technology (TU Darmstadt), Department of Business Management and Logistics, Production and Supply Chain Management
- WHU – Otto Beisheim School of Management, Vallendar
- University of Applied Sciences, Koblenz
- University of Applied Sciences, Ludwigshafen
- University of Applied Sciences, Mainz

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Invest in Bavaria

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**Infrastructure**

- **Major Railways**: A2, A3, A45, A66, A67
- **Airports**: Frankfurt/Main
- **Inland Ports**: Aschaffenburg, Hanau, Offenbach, Mainz, Worms
- **Rail Freight Hubs**: Frankfurt-Ost, Mainz-Bischheim, Rüsselsheim

**Logistics Workforce**: 145,000 employees = 6.6%*

**Industries**

- Automotive industry
- Chemical industry
- Electrical engineering
- Research and development (R&D)
- Fine mechanics
- Glassware
- IT & Software
- Aerospace industry
- Metal production and working steel
- Industry and mechanical engineering
- Pharmaceutical industry
- Textile and clothing industry

* % of working population

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**Infrastructure**

- **Major Railways**: A2, A3, A45, A66, A67
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**Logistics Workforce**: 145,000 employees = 6.6%*

**Industries**

- Automotive industry
- Chemical industry
- Electrical engineering
- Research and development (R&D)
- Fine mechanics
- Glassware
- IT & Software
- Aerospace industry
- Metal production and working steel
- Industry and mechanical engineering
- Pharmaceutical industry
- Textile and clothing industry

* % of working population
The Rhine-Neckar metropolitan region straddles a number of major trans-European transport axes. The A6/A8 east-west axis and the A5/A67 and the A61/A65 north-south routes provide optimal transport links. On average, it takes just eight minutes to reach the nearest autobahn junction. In addition, Mannheim is Germany’s second most important intercity railway junction – Paris is just three hours away – and it has the second largest marshalling yard in the country. Furthermore, Mannheim/Ludwigshafen’s intermodal harbor is Europe’s second largest inland harbor. Frankfurt airport, Germany’s main air traffic hub, can be reached in just 30 minutes by Intercity Express from Mannheim’s main train station, and in 60 minutes from Karlsruhe.

With over 100,000 companies, the Rhine-Neckar region is one of Germany’s most important economic areas. With 53% of all goods manufactured here going for export, the region’s exceptional transport infrastructure has come fully into its own.

**Logistics Workforce**
95,000 employees = 6.9%*

**Industries**
- Chemical industry/
  pharmaceuticals;
- Electrical engineering;
- Vehicle construction;
- Information technology;
- Life science;
- Aeronautical and aerospace construction;
- Mechanical engineering;
- Medical technology

* % of working population

**Institutions of Higher Education**
The region prides itself on its 30 universities and its 110,000 students. Germany’s first university was founded in Heidelberg in 1386. Karlsruhe has four universities, three institutions of higher education, with the Technical University recently achieving elite status. Economists from the University of Mannheim, which offers a wide range of logistics-related subjects, have been highly sought after for many years. Ludwigshafen’s University of Applied Sciences also offers logistics-related courses, and students at Mannheim’s independent vocational college, the Berufskolleg, can take courses in freight forwarding, transport and logistics.
Stuttgart/Heilbronn

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Highlights of Logistics Region
The Stuttgart-Heilbronn region is located in the state of Baden-Württemberg in southwestern Germany. Names like Daimler, Bosch, Audi, Porsche, Stihl, Trumpf and Kärcher are well-known the world over and help make this region one of Europe’s industrial powerhouses. The resulting demands placed on transport logistics mean that all the major national and international transport logistics companies are represented here.

The region’s key logistics players can rely on a well-developed cargo infrastructure, especially the road network, the intermodal cargo terminals, the Stuttgart air cargo terminal and the inland ports. In seventh place among Germany’s inland ports, the harbor at Heilbronn is the most important on the River Neckar, handling approximately five million tons of goods annually. Its eight kilometers of quays mainly handle commodities such as gravel, sand, rock salt, coal, mineral oils, wood, and animal feeds.

Infrastructure
Major Autobahns
A6, A8, A81
Airports
Stuttgart, Air Cargo Terminal
Heilbronn
Plochingen
Stuttgart
Stuttgart (Tri-modal)
Rail Freight Hubs/
Intermodal Terminals
Kornwestheim Marshalling Yard
Terminal Kornwestheim (DUSS)
Sinning Railport Kornwestheim
Terminal Stuttgart Harbor (DUSS)
Freight Villages (GVZ)
Kornwestheim

Logistics Service Providers
Kooperationszentrum Logistik e.V. (KLOK); Koch, Nef & Oetinger Verlagsauslieferung GmbH; LGI Logistics Group International GmbH; DSV Stuttgart GmbH; Prelogis Park Neuensstadt Müllera; Die Lila Logistik AG; Dähn Spedition; Schmalz + Schön Logistik Gruppe; Wackler Spedition & Logistik; Mösosol GmbH & Co. KG; LSU Schabertle GmbH & Co KG; S+F Fritz Spedition GmbH & Co KG

Population
4.7 m

Logistics Workforce
94,000 employees = 5.9%*

Industries
Automotive industry; Mechanical and electrical engineering

* % of working population

Institutions of Higher Education
Universities
Stuttgart and Hohenheim
Universities of Applied Sciences
Esslingen, Stuttgart, Nürtingen and Heilbronn (FH/HN)
Stuttgart Media University of Applied Sciences
Stuttgart University of Cooperative Education
Stuttgart Institute of Management and Technology
Heilbronn Business School (hbs)
Institutes
2 Max-Planck, 5 Fraunhofer; 4 Institutes of the German Federal Institute of Industrial Cooperative Research Associations; 5 Institutes of the German Aerospace Centre (DLR); 88 Steinbeis Knowledge Transfer Centers and numerous private research institutes
Saarland

Contact

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Highlights of Logistics Region

50% of the EU’s gross domestic product is generated within a 350-mile radius of the Saarland. Due to its central location within Europe the state is a most important hub for the logistics industry. European hubs in the Saarland have for example been established by Dachser, Feste AG and Bosch. Saarland’s outstanding infrastructure provides optimal conditions for all logistics activities. The state has the highest highway density per capita in Germany, modern high-speed railways and five international airports within a range of 100 miles. The airports of Saarbrücken, Luxembourg, Strasbourg, Metz and Frankfurt all provide comprehensive passenger and air freight services. Training opportunities for the logistics workforce are developed constantly in Saarland. Logistics is part of the educational training of several bachelor and master programs, including the “Aviation Business – Pilot- ing and Airline Management” program at the University of Applied Science. Saarland’s close relationship with its neighbors France and Luxembourg additionally facilitates cross-border cooperation.

Infrastructure

Major Railways
A1, A6, A8, A623, A62, A320

Railways and Rail Freight Hubs
The new TGV-ICE link between Paris and Berlin via Frankfurt stops at Saarbrücken. Traveling time from Saarbrücken to Paris: 1 hr. 50 min. Saarbrücken has re-ro capabilities. Inland Ports
The Saar River is canalized and connected to the seaports of Antwerp and Rotterdam via the Mosel and Rhine rivers. Airports
Saarbrücken airport and the nearby international airports at Luxembourg, Frankfurt am Main, Frank- furt-Hahn and Metz all provide comprehensive passenger and air freight services.

Logistics Service Providers
Dachser Euro-Hub;
TNT;
DHL;
DB Schenker;
Anterist + Schneider;
Trans-o-flex;
Movianta Logistics;
Mosolf Group;
Danzas

Logistics Workforce
10,900 employees = 6.6%*

Institutions of Higher Education
Saarland research institutes have worldwide connections and are internationally active. The technol- ogy departments of the University of Saarland, the application-oriented research departments at the Saar- land Polytechnic, and the research institutes are of key importance in this context.

Institutes of Higher Education
- German Research Center for Artificial Intelligence (DFKI)
- Max-Planck-Institute for Informatics (MPI)
- Institute of New Materials (INM)
- University of Saarland
- University of Applied Sciences (HTW), Saarbrücken
- Polytechnic Saarland
- University of Kaiserslautern
- University of Trier
- University of Metz

* % of working population

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Highlights of Logistics Region

This ambitious logistics location bordering France and Luxembourg is home to Frankfurt-Hahn airport. Located near Trier, a city renowned for its remarkable culture and history, Frankfurt-Hahn currently ranks fourth among Germany’s air cargo hubs. With the impending completion of a 3,800-meter runway extension, the airport can guarantee its customers the comfort of unrestricted around-the-clock operations.

The Trier region also offers high-performance rail and expressway services to all important European commercial centers, as well as an inland port located on the River Mosel. Both the Mosel and Saar rivers are important access routes into Europe’s network of inland waterway. Trier’s freight village is also able to service three modes of transportation within one terminal.

Infrastructure

Major Motorways
A1, A48, B50

Airports
Frankfurt–Hahn, Zweibrücken

Inland Ports
Trier

Rail Freight Hubs
Mainz, Koblenz

Freight Villages (GVZ)
Trier, Koblenz

Logistics Service Providers
Aeroflot Cargo;
Air France Cargo;
Bucher GmbH;
Danzas GmbH;
Elsen GmbH & Co.KG;
Fraport Cargo Services;
Menlo Worldwide Logistics;
Nagel Airfreight GmbH;
DB Schenker;
VG Cargo Group

Population
800,000

Logistics Workforce
15,000 employees = 6.6%*

Industries
Manufacturing industry; Aviation; Railway supply industry; Health; Veterinary medicine; Sector; Welfare; Trade; Services; Food

Institutions of Higher Education
- WHU – Otto Beisheim School of Management, Vallendar (www.whu.edu)
- University of Applied Sciences, location Pirmasens (www.fh-kl.de/pirmasens)
- University of Applied Sciences, location Zweibrücken (www.fh-kl.de/bw)
- University of Applied Sciences Koblenz (www.fh-koblenz.de)
- University of Applied Sciences Ludwigshafen (www.fh-ludwigshafen.de)
- University of Applied Sciences Trier, Birkenfeld Environmental Campus (www.umwelt-campus.de)
- University Trier, International Health Care Management Institute (www.ihci.uni-trier.de)

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Highlights of Logistics Region

The city of Nuremberg is the economic core of the Nuremberg and Upper Franconia region. Located in the center of Europe, the region offers considerable advantages, including an efficient infrastructure and attractive investment sites, and is home to global players such as GfK, DATEV, Quelle, Bosch, MAN, Siemens, REHAU and Rosenthal. A distribution center and logistics hub for southern Germany, it also serves as a gateway to southeastern Europe. Its location on the intersection of several important trans-European corridors brings the markets of both western and eastern Europe within easy reach. Nuremberg’s international airport boasts modern air cargo centers that connect the region directly with many European business centers. Last but not least, the region is home to a variety of major logistics companies and offers an excellent research landscape.

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Infrastructure

Major Railways
Airports
Nuremberg Intl. Airport with approx. 4 m passengers/yr; Hof Regional Airport with regular service to Frankfurt Intl. Airport
Inland Ports
Nuremberg, Bamberg, Fürth, and Forchheim on the Main-Danube Canal, the only waterway linking the North and Black Seas
Rail Freight Hubs
Nuremberg, Bamberg, Bayreuth, Coburg and Hof offer national and intl. express passenger, freight and container services.
Freight Villages (GVZ)
Southern Germany’s largest logistics center, the trimodal container terminal in Nuremberg handles more than 11 m tons of cargo annually.

Logistics Service Providers

BILOG; Bischoff; COLOG; Dachser; DPD Parcel Service; K&N; M&M Euronational; Pihlhand; DB Schenker; UTI; UPS

Logistics Workforce
100,000 employees = 7.2%*

Industries

Power electronics; Micro electronics, Automation engineering; Manufacturing technology; Automotive engineering and electronics; Automotive component suppliers; Writing and printing equipment manufacturers; Corporate services (e.g. market research; Research and development); Mechanical engineering; Electrical engineering; Electronic systems and mechatronics; Radio; TV; Telecommunications; Medical technology; Technical porcelain and chinaware manufacturers; Textile manufacturers; Toys

Institutions of Higher Education

- Friedrich-Alexander University Erlangen-Nuremberg
- University of Bamberg
- University of Bayreuth
- University of Applied Sciences Hof
- Georg Simon Ohm University of Applied Sciences Nuremberg
- Fraunhofer Society Nuremberg with sub-institutes:
  - ATL Working Group for Technologies in Logistic Service Industries;
  - IIS Institute for Integrated Circuits;
  - IIIB Institute for Integrated Systems and Device Technology;
  - Center for Automotive Power Electronics and Mechatronics
  - FORLOG Bavarian Research Cooperation
  - CNA Center for Transportation and Logistics Neuer Adler, Nuremberg
  - Logistics Agency Upper Franconia, Hof (Logistik Agentur Oberfranken)

*N of working population

Nuremberg/Upper Franconia
Freiburg/Lörrach Region

The Freiburg/Lörrach region in the triangle formed by the German, French and Swiss borders is a major hub for both goods and passenger traffic. The geography of the Rhine Valley determines the predominance of north-south traffic.

The “EuroAirport Basel-Mulhouse-Freiburg” and the road and rail networks are gradually being extended to cope with the growing volume of traffic, transportation and logistics; the Rhine additionally provides a water route and modern harbor infrastructure. The majority of logistics companies in the area are in the small to medium-sized category. Many specialize in handling customs formalities with neighboring Switzerland and in transalpine traffic to Italy. Well-known industrial and trading companies have taken advantage of this proximity to national borders and located their central storage and logistics facilities along the highway which follows the Rhine Valley.

Infrastructure

Major Railways
A5, A98
Airports
EuroAirport Basel-Mulhouse-Freiburg
Inland Ports
Rhine Port Basel
Rhine Port Breisach
Rhine Port Weil am Rhein
Rail Freight Hubs
Weil am Rhein/Basel Transshipment Terminal;
Truck-on-Train leading station for the Freiburg-Novara route;
Freiburg North Goods Station
Freight Villages (GVZ)
Weil am Rhein

Logistics Service Providers
Barth Logistics Systems;
Karl Dischinger Transport;
Froh Transport and Logistics;
Grieshaber Logistics Groups;
Rhenus Logistics;
Strack Transport Association;
DB Schenker;
Dachser;
DHL/Danzas;
German Parcel Service

Population
1 m

Logistics Workforce
18,500 employees = 6.0%*

Industries
Life sciences (incl. Pharmaceuticals);
Chemical industry;
Engineering

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* % of working population

Institutions of Higher Education
- University of Freiburg
  The Institute of Transport Economics carries out research and teaching in “network economics” in the transport field; the Faculty of Computer Networks and Telematics in the Department of Computer Science examines the use of telecommunications in logistics.
- University of Cooperative Education, Lörrach (BA LOE)
The Department of Business Management offers an internationally oriented course in “shipping, transport and logistics.”
- Vocational Schools
  Commercial colleges train specialist staff in “Transport and Logistics Services,” “Warehouse Logistics” and “Courier, Express Delivery and Postal Services.”
Highlights of Logistics Region

The Ulm/Neu-Ulm business region is an enormously significant logistics location. In mid-2005, Duss GmbH opened a new intermodal traffic terminal right on the A8 federal highway. The transshipment center at Ulm dispatches goods to all the main business regions and seaports in Germany eight times a day.

The Ulm and Swabian Chambers of Commerce have established a competence center based in Ulm itself, offering a broad spectrum of consulting services. More than 10,000 individuals in the region are currently employed in the logistics field. Another 24,000 employees perform logistic tasks within industrial and trading companies.

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Infrastructure

Major Autobahns
A7, A8

Airports
Stuttgart
Munich

Rail/Rail Freight Hubs
ICE Terminal
Ulm

Freight Villages (GVZ)
Ulm

Logistics Service Providers

Auto Mann GmbH & Co. KG;
Spedition Altrichter; Bohnet GmbH;
Ertle GmbH & Co. KG;
Christopher Güldmann
Konrad Allgaier Spedition GmbH;
Janz Internationale Spedition GmbH & Co. KG;
Hornold Logistik Gruppe
GmbH & Co. KG; C.E. Noerpel
GmbH + Co; Seifert Spedition
Logistik GmbH; Dachser GmbH &
Co. KG; Stöhr

Population
500,000

Logistics Workforce
22,500 employees = 8.1%*

Industries
Automotive industry;
Chemical industry;
Pharmaceutical industry

Institutions of Higher Education

The universities of applied sciences in Ulm and Neu-Ulm jointly offer a bachelor’s course in Business Engineering/Logistics, focusing on business logistics and international logistics networks. The Institute for Business Organization and Logistics combines consulting and knowledge transfer in the fields of logistics and supply chain management.

The Neu-Ulm University of Applied Sciences also offers courses on logistics as part of its business administration studies.

* % of working population
Logistics services in south-eastern Germany’s Danube Region are mainly concentrated around the freight villages at Regensburg, Straubing and Ingolstadt. They provide access to the extensive highway system, a railway network with 19 Bavarian reloading terminals, the Rhine-Main-Danube waterway connecting the North Sea and the Black Sea, and the airports of Munich and Nuremberg with their comprehensive national and international connections. Regensburg is an expanding logistics competence center with a dense network of companies and logistics service providers located around its port on the River Danube. Straubing’s Straubing-Sand Industrial Park specializes in ecology and recyclable primary products. Ingolstadt, an important production location in its own right with high-performance companies such as Audi, has its own intermodal transshipment terminal.

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www.straubing-sand.de
www.ifg-ingolstadt.de

**Logistics Service Providers**

- Ingolstadt: EME Elektro-Metall Export GmbH; Montes GmbH & Co. KG; Rudolph Logistik Gruppe; Schmid Transport und Spedition GmbH; Reinsch Speditions- & Kontraktlogistik GmbH; Kühne & Nagel KG; Rudolph Logistik Gruppe; Kühne & Nagel KG; Reinsch Speditions- & Kontraktlogistik GmbH; Wolf Logistik
- Straubing: M. Pregmayr & Co. KG; Schmid Transport und Spedition GmbH & Co. KG; DB Schenker; Landauer Transport Gesellschaft; DB Schenker; Landauer Transport Gesellschaft; Wolf Logistik
- Regensburg: M. Sprengesser GmbH & Co. KG; Wolfdorf Logistik GmbH; DB Schenker; Landauer Transport Gesellschaft; DB Schenker; Landauer Transport Gesellschaft

**Logistics Workforce**

- 65,000 employees = 7.5%*

**Industries**

- Automotive; Electrical engineering

* % of working population

**Institutions of Higher Education**

- University of Regensburg
- University of Applied Sciences Regensburg
- Catholic University of Eichstätt and Ingolstadt

**Research Consortia**

- ForLog (www.forlog.de): creation of supra-adaptive logistics systems at the University of Regensburg and the Technical University Munich

**Networks**

- Logistics Initiative of Straubing-Sand (LIS) (www.zvi-straubing.de): Qualification & recruitment measures, lectures & workshops in the field of logistics
- BayTech Logistic Transfer Center (www.baytech.de)
Europe’s Logistics Hub

National Borders
Major Railways
Major Autobahns
Navigable Waterways
Airports
Seaports
Inland Ports
Rail Freight Hubs
Freight Villages (GVZ)
Location with Intermodal Terminal (KV)
Symbol size reflects size of hub

Map: Germany Trade & Invest; Typoly (Inken Greisner)

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Highlights of Logistics Region
Munich, the capital of Bavaria, is one of the most important commercial centers in Europe and Germany’s leading high-tech location. Global players such as BMW, EADS, MAN and Siemens have their headquarters in the city; some even have production facilities here. Attracted by its business-friendly environment, national and international logistics service providers have settled in Munich, building up strong and efficient networks with firms based in the area and expanding the wide spectrum of companies.

Munich provides logistics companies with excellent operating conditions: easy access to Germany’s extensive road and rail networks, the multimodal reloading point at the Riem container terminal, fast-growing cargo transportation facilities at Munich’s international airport hub, and a top-ranking exhibition center for leading logistics fairs such as the biennial Transport Logistic.

Infrastructure
Major Autobahns
A8, A9, A92, A94, A95, A96, A99, A995
Airports
Franz-Josef-Strauss Munich
Rail Freight Hubs
Munich

Logistics Service Providers
Groupe Heppner; Hellmann Worldwide Logistics; DB Schenker; Dachser; Kuehne & Nagel; Panalpina; Nippon Express; ABX Logistics; UPS; DHL; Birkart Globistics; Prologis

Population
84,000 employees = 5.6%*

Industries
Information and communications technology; Aerospace industry; Finance; Nanotechnology; Manufacturing and trade; Environmental technology; Handicrafts; Media; Automotive engineering; Science and research services; Measurement and control systems; Fashion

Institutions of Higher Education
Universities
• Technical University of Munich ([www.tum.de])
• Logistics Innovation Center TU Munich ([www.fml.mw.tum.de/LIZ])
• Ludwig-Maximilian-University Munich ([www.lmu.de])
• University of Applied Sciences Munich ([www.fh-muenchen.de])
• University of Armed Forces in Munich ([www.unibw.de])
Research Consortia
• ForLog ([www.forlog.de])
• University of Regensburg
• Technical University Munich Center of Excellence for Logistics Prien ([www.lkp-prien.de])
Networks
• BayTech Logistic Transfer Center ([www.baytech.de])
• [www.bayern-innovativ.de]

* % of working population
Germany Trade & Invest’s teams of industry experts will assist you in setting up your operations in Germany. We support your project management activities from the earliest stages of your expansion strategy.

We provide you with all of the industry information you need – covering everything from key markets and related supply and application sectors to the R&D landscape. Foreign companies profit from our rich experience in identifying the business locations which best meet their specific investment criteria.

We help turn your requirements into concrete investment site proposals; providing consulting services to ensure you make the right location decision. We coordinate site visits, meetings with potential partners, universities, and other institutes active in the industry.

Our team of consultants is at hand to provide you with the relevant background information on Germany’s tax and legal system, industry regulations, and the domestic labor market.

Germany Trade & Invest’s experts help you create the appropriate financial package for your investment and put you in contact with suitable financial partners.

Incentives specialists provide you with detailed information about available incentives, support you with the application process, and arrange contacts with local economic development corporations.

All of our investor-related services are treated with the utmost confidentiality and provided free of charge.

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About Us

Germany Trade & Invest is the foreign trade and inward investment agency of the Federal Republic of Germany. The organization advises and supports foreign companies seeking to expand into the German market, and assists companies established in Germany looking to enter foreign markets.

All inquiries relating to Germany as a business location are treated confidentially. All investment services and related publications are free of charge.