For your reference, please find within a fold-out map of Germany highlighting the nation’s most important logistics regions.

Germany: Europe’s Logistics Hub
21 Crossroads Accelerating your Business
The mobility of people and goods is a basic prerequisite for economic success. In the face of growing globalization, the freight transport and logistics sectors make a major contribution to the productivity and competitiveness of a country.

The transport sector’s share of European gross national product is around 7%, making it a significant economic and growth factor. In Germany – a major transit country – logistics is the third largest sector after the wholesale and retail trade and the automotive industry. Germany’s share of the European logistics market is around 28%, which makes it a major player in the economic development of Europe. Current forecasts predict that transport growth, and thus the importance of the transport industry as an employment factor, will continue to increase over the years ahead.

The Federal Government is committed to a transport policy that focuses not only on the economic requirements and the social interests of the stakeholders, but also on the ecological impacts of transport. Combating climate change and promoting mobility are not a contradiction in terms. By systematically continuing their efforts to achieve a further reduction in CO₂ emissions, German transport policymakers are making a major contribution to the achievement of our ambitious climate change objectives.

We want to further strengthen Germany as a logistics hub. Logistics is welcome in Germany. When deciding where to locate in Europe, many commercial enterprises appreciate the benefits offered by Germany, especially its central geographical position combined with its excellent infrastructure.

By presenting individual regions of logistics excellence in Germany, this brochure will assist interested commercial enterprises in selecting a suitable location, thereby helping them to position themselves successfully in international competition by means of tailor-made logistics solutions.

Wolfgang Tiefensee

Federal Minister of Transport, Building and Urban Affairs
Federal Government Commissioner for the New Federal States
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 geographical center of the European Union shifted 115 kilometers east to Meerkholz, Hessen, located 42 km east of Frankfurt/Main. Currently, nearly half of the EU’s 493 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. In short, Germany’s central location means the whole of Europe is just a short flight away.
The German economy is the world’s third largest after the United States and Japan. Generating over €2.3 trillion worth of goods and services annually, it easily outstrips its European neighbors. Foreign direct investment (FDI) is also among the highest in Europe and Germany remains the largest exporter of goods in the world.

With over 82 million people, Germany accounts for nearly 17% of the European Union’s total population. It has more consumers, and therefore more consumer spending power, than any other country in the EU. 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 360 colleges and universities, 167 of which are universities of applied sciences, as well as several world-renowned research organizations. Combined, they create a dense network of knowledge that provides a strong economic stimulus of cutting-edge research and innovation. Germany is also a leader in new patent registrations and one of the world’s most prolific sources of scientific publications.

### GDP and population 2006

<table>
<thead>
<tr>
<th>Country</th>
<th>GDP (€ bn)</th>
<th>Population (m)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Germany</td>
<td>2,307.2</td>
<td>82.4</td>
</tr>
<tr>
<td>Austria</td>
<td>256.3</td>
<td>8.2</td>
</tr>
<tr>
<td>Belgium</td>
<td>314.0</td>
<td>10.5</td>
</tr>
<tr>
<td>Finland</td>
<td>167.9</td>
<td>5.2</td>
</tr>
<tr>
<td>France</td>
<td>1,791.9</td>
<td>62.9</td>
</tr>
<tr>
<td>Greece</td>
<td>195.2</td>
<td>11.1</td>
</tr>
<tr>
<td>Ireland</td>
<td>175.7</td>
<td>4.2</td>
</tr>
<tr>
<td>Italy</td>
<td>1,475.4</td>
<td>58.7</td>
</tr>
<tr>
<td>Luxembourg</td>
<td>33.0</td>
<td>0.4</td>
</tr>
<tr>
<td>Netherlands</td>
<td>527.9</td>
<td>16.3</td>
</tr>
<tr>
<td>Portugal</td>
<td>155.2</td>
<td>10.5</td>
</tr>
<tr>
<td>Slovenia</td>
<td>29.7</td>
<td>2.0</td>
</tr>
<tr>
<td>Spain</td>
<td>976.1</td>
<td>43.7</td>
</tr>
<tr>
<td><strong>Eurozone 13</strong></td>
<td><strong>8,406.1</strong></td>
<td><strong>316.6</strong></td>
</tr>
<tr>
<td>Bulgaria</td>
<td>25.1</td>
<td>7.7</td>
</tr>
<tr>
<td>Cyprus</td>
<td>14.5</td>
<td>0.7</td>
</tr>
<tr>
<td>Czech Republic</td>
<td>113.0</td>
<td>10.2</td>
</tr>
<tr>
<td>Denmark</td>
<td>219.5</td>
<td>5.4</td>
</tr>
<tr>
<td>Estonia</td>
<td>13.0</td>
<td>1.3</td>
</tr>
<tr>
<td>Hungary</td>
<td>89.1</td>
<td>10.0</td>
</tr>
<tr>
<td>Latvia</td>
<td>16.1</td>
<td>2.2</td>
</tr>
<tr>
<td>Lithuania</td>
<td>23.7</td>
<td>3.4</td>
</tr>
<tr>
<td>Malta</td>
<td>4.8</td>
<td>0.4</td>
</tr>
<tr>
<td>Poland</td>
<td>269.7</td>
<td>38.1</td>
</tr>
<tr>
<td>Romania</td>
<td>97.1</td>
<td>21.6</td>
</tr>
<tr>
<td>Slovak Republic</td>
<td>43.9</td>
<td>5.3</td>
</tr>
<tr>
<td>Sweden</td>
<td>306.7</td>
<td>9.0</td>
</tr>
<tr>
<td>UK</td>
<td>1,892.2</td>
<td>60.3</td>
</tr>
<tr>
<td><strong>EU 27</strong></td>
<td><strong>11,535.1</strong></td>
<td><strong>492.9</strong></td>
</tr>
<tr>
<td><strong>USA 27</strong></td>
<td><strong>10,547.5</strong></td>
<td><strong>300.9</strong>*</td>
</tr>
</tbody>
</table>

Germany is one of the main beneficiaries of globalization. It has profited from the EU’s expansion more than any other country in Europe. Opening up Germany’s eastern frontiers has fuelled sustained growth in foreign trade. For example, Deutsche Bank Research notes that German exports to Poland grew by 29% in 2006.

Germany has been the undisputed global leader in exports since 2003. Germany’s central bank, the Bundesbank, reports that export volume grew by more than 13% in 2006, earning an estimated €896 billion. Furthermore, its March 2007 Balance of Trade Report notes that balance of trade and current account surpluses last year hit record highs: the current account balance made up 5% of the country’s entire GDP. In terms of total trade volume, Germany ranks second only to the United States.

Roughly 42% of German exports remain in the Euro zone: France, Italy and the Netherlands are the biggest recipients. Another 7.2% of total German exports go to the UK. In 2006, 9.4% of exports went to the new EU member states, whereas only 8.7% went to the USA. Already Germany’s trade volume with both China and the Russian Federation has overtaken its significant trade volume with Japan.

<table>
<thead>
<tr>
<th>Country</th>
<th>Exports</th>
<th>Imports</th>
</tr>
</thead>
<tbody>
<tr>
<td>France</td>
<td>86.1</td>
<td>63.5</td>
</tr>
<tr>
<td>USA</td>
<td>78.0</td>
<td>48.5</td>
</tr>
<tr>
<td>UK</td>
<td>65.3</td>
<td>42.8</td>
</tr>
<tr>
<td>Italy</td>
<td>59.9</td>
<td>40.3</td>
</tr>
<tr>
<td>Netherlands</td>
<td>55.9</td>
<td>60.5</td>
</tr>
<tr>
<td>Belgium</td>
<td>49.2</td>
<td>35.5</td>
</tr>
<tr>
<td>Austria</td>
<td>48.9</td>
<td>29.9</td>
</tr>
<tr>
<td>Spain</td>
<td>42.2</td>
<td>19.5</td>
</tr>
<tr>
<td>Switzerland</td>
<td>34.7</td>
<td>25.2</td>
</tr>
<tr>
<td>Poland</td>
<td>28.8</td>
<td>20.6</td>
</tr>
<tr>
<td>China</td>
<td>27.5</td>
<td>48.7</td>
</tr>
<tr>
<td>Russia</td>
<td>23.4</td>
<td>30.2</td>
</tr>
<tr>
<td>Czech Republic</td>
<td>22.3</td>
<td>22.1</td>
</tr>
<tr>
<td>Sweden</td>
<td>18.9</td>
<td>12.9</td>
</tr>
<tr>
<td>Hungary</td>
<td>15.9</td>
<td>16.0</td>
</tr>
<tr>
<td>Turkey</td>
<td>14.4</td>
<td>9.1</td>
</tr>
<tr>
<td>Denmark</td>
<td>14.0</td>
<td>10.2</td>
</tr>
<tr>
<td>Japan</td>
<td>13.9</td>
<td>23.7</td>
</tr>
<tr>
<td>Others</td>
<td>196.7</td>
<td>172.3</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>896.0</strong></td>
<td><strong>731.5</strong></td>
</tr>
</tbody>
</table>

Source: www.destatis.com
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.
Germany’s turnover from logistics in 2006 outstripped its nearest EU competitors, the United Kingdom and France, by more than 50% and almost equaled the combined turnover of its next three main competitors (see table below).

The Fraunhofer Institute’s 2006 Top 100 in European Transport and Logistics show that Germany accounts for 23% of the €730 billion spent on logistics services in western Europe (the fifteen pre-2004 members, plus Norway and Switzerland). Germany is also the United States’ biggest European trading partner; around 2,000 U.S. companies are located in Germany, and well over 3,000 German companies have operations in the United States.

The logistics sector plays a crucial role in maintaining and improving trade flows between two of the world’s largest economies.

The world’s largest logistics services provider is a German company, Deutsche Post World Net (DPWN) rose to the top of the global market in 2005 with its purchase of Exel, the global market leader in contract logistics. With some 500,000 employees in more than 220 countries, DPWN, including the express carrier DHL, is now one of the largest logistics employers worldwide, earning almost one billion euros in the first quarter of 2007. Another German company making international headlines is Deutsche Bahn; its takeover of BAX Global, one of the USA’s top logistics operators, has also greatly added to its strength as a global player.
Contract logistics is the industry's largest single segment. With a turnover of more than €45 billion, it accounts for more than a third of Germany’s entire logistics market with significant possibilities for further growth. Dr. Norbert Bensel, Chairman of DB Logistics Management Board, estimates that thus far only 23% of the contract logistics sector potential has been exploited.

Road haulage accounts for 70% of freight traffic in Germany. Railways currently carry approximately 15%, but this share is likely to increase with the completion of six major European rail freight corridor upgrades – of which three are in Germany. The Stockholm-Naples route is expected to cut as much as two and a half hours travel time between Berlin and Munich. In addition, about 10% of freight moves along Germany’s canals and navigable rivers.
There are approximately 60,000 companies in Germany’s logistics sector, employing almost 2.5 million individuals or nearly 8% of the total workforce. Analysts predict that logistics-related employment could expand by as much as 20% 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.

If productivity is taken into consideration, not only are unit costs per worker in most segments of the logistics sector in line with the EU25’s average, but in fact they are also lower than those in France and the United Kingdom, Germany’s nearest competitors.
The country’s logistics workforce is geographically concentrated along the Rhine-land, 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. This concentration is 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 an enormous economic boost. This is characterized by the high density logistics cluster south of Berlin extending up to the Polish border.

**Logistic Employees in Germany (2004)**

*Employees in logistics: percentage liable for national insurance contributions, by postal code*

- 8 – 10%
- 7-8%
- 5-7%
- 0-5%

Invest in Germany is the official investment promotion agency of the Federal Republic of Germany. Our mandate is to promote Germany’s international image and to assist and advise potential investors in Germany. Foreign enterprises planning to establish their business operations in Germany can obtain information on the business environment, such as corporate investment frameworks, tax regulations, and subsidies.

Our range of services includes strategic planning, market research, and competitive analysis. Our experts provide comprehensive project management and support services from site selection to the final realization of the investment. All inquiries are kept confidential and our services are free of charge.

We offer on-site client support from our headquarters in Berlin and from our foreign offices in the US, Japan, and China.

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INTRODUCTION TO THE REGIONS

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 (Autobahn-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.
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 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 is currently under construction), are also first-class intermodal locations and are fully integrated into the region’s high-capacity infrastructure.

Logistics Service Providers

- BLG Logistics Group AG & Co.;
- Eurogate GmbH & Co. KG a.A., KG;
- FIEGE Deutschland Stiftung & Co. KG; DHL GmbH; Kieserling Holding GmbH; Beluga Shipping GmbH; Schenker Deutschland AG; 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, Ostfriesland, Wilhelmshaven
- University of Oldenburg
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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. Multinational companies can count on the support of specialists in just about any field to run their worldwide 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 Autobahns
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 - Büttzleth
Cuxhaven
Lüneburg

Rail Freight Hubs
Billwerder Moorfleet
Hamburg/Maschen
Meinersdorf
Stade-Brunshausen

Freight Villages (GVZ)
Hamburg Altenwerder
Lübeck

Logistics Service Providers
The Hamburg metropolitan region is the logistics metropolis of northern Europe with nearly 6,000 companies and approximately 350,000 employees. A German logistics industry study has shown that Hamburg is the most dynamic location for logistics activities in Germany, and concludes that Hamburg will undergo above average development in the few next years.

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

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.*

* % of working population
Highlights of Logistics 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.

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Infrastructure
• Direct access to highway networks: highway A19 & A20 cross southerly
• Intermodal terminals, freight villages, marshalling 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

Airport
Scheduled and charter flights, cargo facilities, 140,000 passengers, international destinations

Cruise Port
New terminal opened, international cruise lines

Logistics Service Providers
Schenker
Hangartner
Railion Deutschland
Spedition Gustke
Baltic Lloyd

Shipping Companies
Deutsche Seereederei
Scandlines
TT Line
Reederei Interhansa
Reederei F. Laeisz

Population
500,000

Logistics Workforce
5,500 employees = 5.6%*

Industries
Maritime industries
Machine building
Shipbuilding
Wind energy industry
Services/tourism
Logistics
Biotechnology

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.wiwi.uni-rostock.de/~verkehr/ostseeinstitut.htm)
• Faculty of Production- and Intra-logistics (www.lpl-rostock.de)
• Faculty of Factory systems and Materials Handling (www.fms.uni-rostock.de/ifl)
• Navigation School (www.sf.hs-wismar.de)

* % 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.

Logistics Service Providers

- Fiege Group
- Hellmann Worldwide Logistics
- Meyer & Meyer International Haulage
- Werner Egeland Automobile Logistics
- Heinrich Koch International Haulage
- DFDS
- Sostmeier Shipping and Logistics
- Overnight Deep-frozen Services (Coppenrath & Wiese)
- Dachser
- Nagel Transport
- DPD
- Rosenbaum Fruit Logistics
- Alfons Greiling
- DHL/HSE24
- FM0 Cargo services
- LIs
- Kühn Refrigeration Logistics

Institutions of Higher Education

- 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
- University and College for Applied Science with the Department of Logistics
  - LOGIS.NET Competence Center
  - German Institute for Food Technology

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Infrastructure

Major Autobahns
- A1, A30, A33, A43
Airports
- Münster/Osnabrück
Inland Ports
- Port of Osnabrück
- Port of Münster
Rail Freight Hubs
- Two marshalling yards
Freight Villages (GVZ)
- Osnabrück

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
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 more than 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.

Some of Europe’s leading logistics companies are located in North Rhine-Westphalia. They employ approximately 277,000 people, a figure which climbs to 600,000 when logistics staff from non-logistics companies are included. The Rhine-Ruhr region has enormous potential as a logistics hub, especially for European distribution center projects.

Infrastructure

Major Autobahns
Important European highways like E35 from Amsterdam to Rome and E40 linking Calais with eastern Europe cross the Rhine-Ruhr region.

Airports
Cologne/Bonn Airport is Germany’s second 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.

Logistics Service Providers
Deutsche Post World Net
United Parcel Service Germany
Rhenus Logistics Germany
Fiege Group Germany
MGL Metro Group Logistics
Imperial Logistics International
Arvato Logistics Services
Nagel Group
Alpha Management
TNT Express
NYK Logistics Germany

Population
9.1 m

Logistics Workforce
277,000 employees = 7%*

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

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.
Highlights of Logistics Region

The Hannover-Braunschweig region 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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Infrastructure

Major Autobahns
A2, A7, A27
Airports
Hannover
Braunschweig
Inland Ports
Hannover Port Authority
Peine-Salzgitter Transport Services
Braunschweig Port Operating Company
Rail Freight Hubs
Seelze Marshalling Yard
Freight Villages (GVZ)
Hannover
Salzgitter
Wolfsburg
Intermodal Terminal (KV)
Hannover-Linden
Hannover-Leinetal
Nordhafen

Logistics Service Providers

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

Population
3.2 m

Logistics Workforce
42,000 employees = 6.9%*

Industries

Automotive industry
Chemical industries
IT & software
Engineering
Pharmaceuticals

Institutions of Higher Education

- Leibniz University Hannover
- IVE Institute of Transportation and Railways
- PSLT (Department of Storage and Transport Systems Planning and Operation)
- Braunschweig/Salzgitter Technical College
- Braunschweig Technical University

* % of working population
Highlights of Logistics Region

The Magdeburg region 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.

Infrastructure

Major Autobahns
A2, A14

Inland Ports
Magdeburg
Haldensleben
Schönebeck
Aken
Rößau

Freight Villages (GVZ)
Magdeburg/Hansehafen

Rail Freight Hubs
Magdeburg/Sudenburg

Logistics Service Providers
Wincanton
Hellmann Nicolai
Schenker
Dachser
Wolter Koops
Otto Versand
Magdeburger Hafen GmbH
Hövelmann Logistik
Ricó
Ritter Logistik
PBSV

Population
2.1 m

Logistics Workforce
19,000 employees = 6.7%*

Industries
Mechanical engineering; Food industry; Renewable energy; Wood processing industry; Automotive industry; Consumer goods industry

Institutions of Higher Education

• Otto-von-Guericke University of Magdeburg
• Martin-Luther-University Halle-Wittenberg
• University of Applied Sciences Harz
• University of Applied Sciences Magdeburg-Stendal
• University of Applied Sciences Anhalt

Research
Fraunhofer Institute for Factory Operation and Automation IFF (development and optimization of solutions in the fields of logistics, virtual engineering, automation and plant engineering) with its Virtual Development and Training Center (VDTC) and a facility which tests and certifies RFID processes.

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* % of working population
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.

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Infrastructure

Major Autobahns
A2, A9, A10, A11, A12, A13, A19, A24, A100, A111, A113, A115

Airports
Airport Berlin Brandenburg International BBI (Schönefeld); Tegel

Inland Ports
BEHALA
Brandenburg Eisenhüttenstadt
Freight Village West Berlin
Königs Wusterhausen

Rail Freight Hubs/
Intermodal Terminals (KV)
Seddin
Schwarzheide
Elsterwerda

Freight Villages (GVZ)
City – GVZ BEHALA
GVZ Berlin East
GVZ Berlin West
GVZ Berlin South
ETTC Euro Transport & Trade Center

Logistics Service Providers
Deutsche Bahn (Schenker, Raillian);
Deutsche Post, DHL; Kühne & Nagel;
Dachser; DPD; UPS; Rhenus;
Panalpina; Fiege; Gefco

Population
4.7 m

Logistics Workforce
106,000 employees = 6.4%*

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

Institutions of Higher Education
• Technical University Berlin (TU)
• Humboldt University Berlin
• Berlin Free University
• Viadrina European University
• Technical University for Technology and Business (FHTW)
• Technical University of Wildau
• University of Business Berlin (FHW)
• Advanced Technical College Berlin (TFH)
• Berlin University of Cooperative Education for Business Berlin
• Hasso Plattner Institute (SAP)
• Steinbeis Technical University Berlin
• Fraunhofer Applied Center for Logistic System Planning and Information Systems, Cottbus
• Fraunhofer Institute for Manufacturing and Design Engineering
• Konrad-Zuse-Center for Information Technologies Berlin (ZIB)
• Research and Operator Network for Transportation Technology Berlin

* % of working population
Highlights of Logistics Region

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. Once DHL’s hub becomes operational, the Leipzig/Halle airfreight hub is expected to join the top ten express-freight hubs worldwide.

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!

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Infrastructure

Major Autobahns
A4, A9, A13, A14, A17, A38, A72
Airports
Dresden
Leipzig/Halle (24-hour service)
Inland Ports
Dresden
Riesa
Torgau
Halle
Rosslau
Aken
Rail Freight Hubs
Dresden
Halle
Leipzig
Freight Villages (GVZ)
Leipzig
Dresden
Südwestsachsen
(Chemnitz-Glauchau-Zwickau)

Logistics Service Providers

DHL
Quelle
Kühne+Nagel
Amazon
Schenker
Schnelleke-Gruppe

Population
4.9 m
Logistics Workforce
93,000 employees = 6.1%*

Industries

Automotive industry
Engineering
Biotechnology
Chemical industry
Microelectronics

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

* % of working population
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, Kassel 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 regional management agency NordHessen GmbH is a one-stop shop which is in contact with all key regional partners 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

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. OHG;
Rudolph Logistik Gruppe;
Schenker Deutschland AG;
Friedrich ZUFALL GmbH & Co. KG;
System Alliance GmbH

Population
1.1 m

Logistics Workforce
33,000 employees = 7.1%*

Industries
Full range of logistic related industries
Distribution
Contract
Transport
Automotive

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]
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 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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Infrastructure
Major Autobahns
A4, A71, A9
Airports
Erfurt
Rail Freight Hubs
Eisenach
Erfurt
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
Schenker Logistics
Panopa Logistics
DHL
Fiege Logistics
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
RHINE-MAIN REGION

- Airports
- Seaports
- Inland Ports
- Rail Freight Hubs
- Freight Villages (GVZ)

Symbol size reflects size of hub

Location with Intermodal Terminal (KV)

National Borders
Major Railways
Major Autobahns
Navigable Waterways

Navigable Waterways
Seaports
Major Railways
National Borders

30 km
Highlights of Logistics Region
Frankfurt am Main has one of the largest airport cargo facilities in the world, an excellent highway network and two important inland waterways – efficient infrastructures which combine to create a pulsing metropolis with outstanding advantages as a logistics location. The city is also continental Europe’s biggest financial center.

The Rhine-Main region, which includes not only Frankfurt, but also the neighboring cities of Mainz and Wiesbaden and the towns of Rüsselsheim, Darmstadt, Offenbach, Hanau, Aschaffenburg, Bingen, Worms and Alzey, has a big portfolio of industries and great logistics potential.

In addition, the Bavarian Lower Main logistics district in the southeast of the region provides excellent access to all European markets through the tri-modal container terminal at Aschaffenburg on the trans-European Rhine-Main-Danube canal.
### Highlights of Logistics Region

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.

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### Infrastructure

<table>
<thead>
<tr>
<th>Major Autobahns</th>
<th>E35, E50, A5, A6, A8, A67, A61, A65</th>
</tr>
</thead>
<tbody>
<tr>
<td>Inland Ports</td>
<td>Staatliche Rhein-Neckar;</td>
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<tr>
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<td>Hafengesellschaft Mannheim mbH;</td>
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<td>Hafenbetriebe Ludwigshafen am Rhein</td>
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<td>GmbH; Verkehrsbetriebe Speyer GmbH;</td>
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<td>Hafen Betriebs GmbH Worms; Hafenbetriebe Rheinland Pfalz GmbH – Wörth; Stadtwerke Germerheim GmbH; Karlsruher Versorgungs-, Verkehrs- und Hafen GmbH – Rhine ports division</td>
</tr>
<tr>
<td>Rail Freight Hubs</td>
<td>Karlsruhe</td>
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<tr>
<td></td>
<td>Mannheim</td>
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<tr>
<td>Intermodal Terminals (KV)</td>
<td>BASF Ludwigshafen; Mannheim trade port; Ro-ro facility in Mannheim</td>
</tr>
<tr>
<td>Inland Ports (Container Terminals)</td>
<td>Karlsruhe Rhine; Mannheim (2); Ludwigshafen; Germersheim; Wörth; Worms</td>
</tr>
</tbody>
</table>

### Logistics Service Providers

- BTS Delhey; Dachser; DHL DANZAS;  
- Feige IDC; Kühne & Nagel; Loxxess;  
- Planung logistics; Roman Mayer  
- Transport und Logistik; Trans-o-flex;  
- Wincanton Trans European

### 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 Berufskademie, can take courses in freight forwarding, transport and logistics.

### Logistics Workforce

- Population: 2.7 m
- 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
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

Inland Ports
Heilbronn
Plochingen
Stuttgart
Stuttgart (Trimodal)

Rail Freight Hubs/
Intermodal Terminals
Kornwestheim Marshalling Yard
Terminal Kornwestheim (DUSS)
Stinnes Railport Kornwestheim
Terminal Stuttgart Harbor (DUSS)

Freight Villages (GVZ)
Kornwestheim

Logistics Service Providers
Kompetenzzentrum Logistik
Kornwestheim GmbH (KLOK);
Hafen Stuttgart GmbH;
Deutsche Umschlaggesellschaft
Schiene – Straße (DUSS) mbH;
Stuttgarter Container Terminal GmbH;
Friedrich Scholpp GmbH & Co. KG;
Schober Gruppe;
Erwin Steinle GmbH & Co. KG;
DHL Express Vertr. GmbH & Co. OHG

Population
4.7 m

Logistics Workforce
94,000 employees = 5.9%*

Industries
Automotive industry
Mechanical and electrical engineering

Institutions of Higher Education

Universities
Stuttgart and Hohenheim

Universities of Applied Sciences
Esslingen, Stuttgart, Nürtingen
and Heilbronn (FHHN)

Stuttgart Media University of
Applied Sciences
Stuttgart Institute of Management
and Technology
Heilbronn Business School (hbs)

Institutes
2 Max-Planck; 6 Fraunhofer;
4 Institutes of the German Federation
of Industrial Cooperative Research
Associations;
5 Institutes of the German Aerospace
Centre (DLR);
88 Steinbeis Knowledge Transfer
Centers and numerous private
research institutes

* % of working population

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### Highlights of Logistics Region

Saarland’s central location has become increasingly important due to the European integration process and the development of the single European market. This is also reflected in the fact that 50% of the EU’s gross domestic product is generated within a 350-miles radius of the state.

Saarland’s close relationships with its neighbors also facilitate cross-border cooperation. Saarland’s European focus is a significant factor in the site selection process.

The transportation infrastructure in Saarland is outstanding. For example, the region’s highway network has the highest density per capita in Germany. Saarland’s interlocking mesh of highways and railways assures its economy’s key role within Europe. Saarbrücken airport and its neighbors in Luxembourg, Strasbourg, Metz and Frankfurt provide comprehensive passenger and air freight services.

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### Infrastructure

**Major Autobahns**  
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 ro-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, Frankfurt-Hahn and Metz all provide comprehensive passenger and air freight services.

**Distance b/w Saarbrücken & ... in miles**  
Paris 205; Stuttgart 147; Frankfurt 117; Zurich 205; Strasbourg 59; Brussels 176; Luxembourg 59.

### Logistics Service Providers

- Anterist + Schneider/Schenker Deutschland AG
- INA Group
- Dachser Euro-Hub
- Villeroy & Boch logistic center
- Sanalog Logistik
- Amer Sports
- Bosch European logistics center
- Mosolf Group

### Logistics Workforce

10,900 employees = 6.6%*

### Industries

- Automotive industry including:  
  - Automotive suppliers  
  - Logistics service providers  
  - IT branch  
  - Logistics telematics  
  - Distribution centers

### Institutions of Higher Education

- German Research Center for Artificial Intelligence (DFKI)
- Max-Planck-Institute for Informatics (MPI)
- Institute of New Materials (INM)
- University of Saarland
- Polytechnic Saarland
- University of Kaiserslautern
- University of Trier
- University of Metz

* % of working population
**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.

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**Infrastructure**

<table>
<thead>
<tr>
<th>Major Autobahns</th>
<th>A1, A48, B50</th>
</tr>
</thead>
<tbody>
<tr>
<td>Airports</td>
<td>Frankfurt-Hahn, Zweibrücken</td>
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<td>Trier</td>
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<tr>
<td>Rail Freight Hubs</td>
<td>Mainz, Koblenz</td>
</tr>
<tr>
<td>Freight Villages (GVZ)</td>
<td>Trier, Koblenz</td>
</tr>
</tbody>
</table>

**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
- Schenker Deutschland AG
- 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

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**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.bw.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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* % of working population

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*Photo © Frankfurt-Hahn Airport, Water and Shipping Authority Trier*
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 south-eastern 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 Autobahns

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; Pöhland; 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 mechatronic; 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; IISB 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]

* % of working population
Highlights of Logistics 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 at Basel 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 trans-Alpine 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 Autobahns
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 loading 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
Fröde Transport
Fross Transport and Logistics
Grieshaber Logistics Groups
Rhenus Logistics
Streck Transport Association
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

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 telematics 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.”

* % of working population
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 Gollmann
Konrad Allgaier Spedition GmbH;
Janz Internationale Spedition GmbH &
Co. KG; Honold Logistik Gruppe
GmbH & Co. KG; C.E. Noerpe;
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
Highlights of Logistics Region

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

Infrastructure
Major Autobahns
A3, A9, A92, A93
Airports
Munich
Nuremberg
Inland Ports
Regensburg
Straubing
Rail Freight Hubs
Regensburg Ost
Straubing
Ingolstadt
Freight Villages (GVZ)
Regensburg
Straubing-Sand
Ingolstadt

Logistics Service Providers
Ingolstadt
EME Elektro-Metall Export GmbH;
Montes GmbH & Co. KG;
Rudolph Logistik Gruppe;
Scherm Tyre and Projekt Logistik
Straubing
Kühne & Nagel KG;
Hafen Logistik Straubing-Sand GmbH;
Reinsch Speditions- & Kontraktlogistik
GmbH; Honold Reifenlogistik GmbH;
Wolf Logistik
Regensburg
M. Preymesser GmbH & Co. KG;
Schmid Transport und Spedition GmbH
& Co. KG; Schenker Logistics;
Landauer Transport Gesellschaft Doll
KG [LTG]; Horst Pöppel Speditions
GmbH & Co. KG

Population
2.3 m

Logistics Workforce
65,000 employees = 7.5%*

Industries
Automotive; Electrical engineering

Institutions of Higher Education
Universities
• University of Regensburg
  [www.uni-regensburg.de]
• University of Applied Sciences
  Regensburg [www.fh-regensburg.de]
• Catholic University of Eichstätt and
  Ingolstadt [www.ku-eichstaett.de]
• University of Applied Sciences
  Ingolstadt [www.fh-ingolstadt.de]

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 (LISS) [www.zvi-sraubing.de]:
  Qualification & recruitment
  measures, lectures & workshops
  in the field of logistics
• BayTech Logistic Transfer Center
  [www.baytech.de]

* % of working population
MUNICH

- Airports
- Seaports
- Inland Ports
- Rail Freight Hubs
- Freight Villages (GVZ)

Symbol size reflects size of hub

Location with Intermodal Terminal (KV)

Major Railways

Navigable Waterways

Major Autobahns

National Borders

Inland Ports

Navigable Waterways

Seaports

Airports

Major Autobahns

National Borders
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 Logistik.

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.lkz-prien.de)

Networks
- BayTech Logistic Transfer Center (www.baytech.de)
- Bayern-innovativ.de

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

Institution 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.lkz-prien.de)

Networks
- BayTech Logistic Transfer Center (www.baytech.de)
- Bayern-innovativ.de

* % of working population

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Infrastructure

Major Autobahns
A8, A9, A92, A94, A95, A96, A99, A995

Airports
Franz-Josef-Strauss Munich

Rail Freight Hubs
Munich

Logistics Workforce

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 service
Measurement and control systems
Fashion

* % of working population
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