



NORTH RHINE-WESTPHALIA – YOUR NO.1 INVESTMENT LOCATION IN GERMANY

NASHVILLE; OCTOBER 1, 2018

ROUGHLY 160 MILLION PEOPLE WITHIN A RADIUS OF 500 KM AROUND THE STATE CAPITAL OF DÜSSELDORF

From no other location in Europe so many people with such high purchasing power can be reached within such a short distance as from North Rhine-Westphalia:



Source: GfK Geomarketing, catchment area analysis, Dec. 2015

Ranking 500 km radius inhabitants (in millions)

1.	Düsseldorf	159.8
2.	Amsterdam	154.1
3.	Paris	150.4
4.	Munich	141.9
5.	London	130.5
6.	Berlin	113.9

Ranking 500 km radius purchasing power (in € million)

1.	Düsseldorf	3,457,053
2.	Paris	3,261,390
3.	Amsterdam	3,248,556
4.	Munich	2,805,398
5.	London	2,703,188
6.	Berlin	1,902,834

1. INDUSTRIAL HEARTLAND OF GERMANY



INDUSTRIAL HEARTLAND OF GERMANY

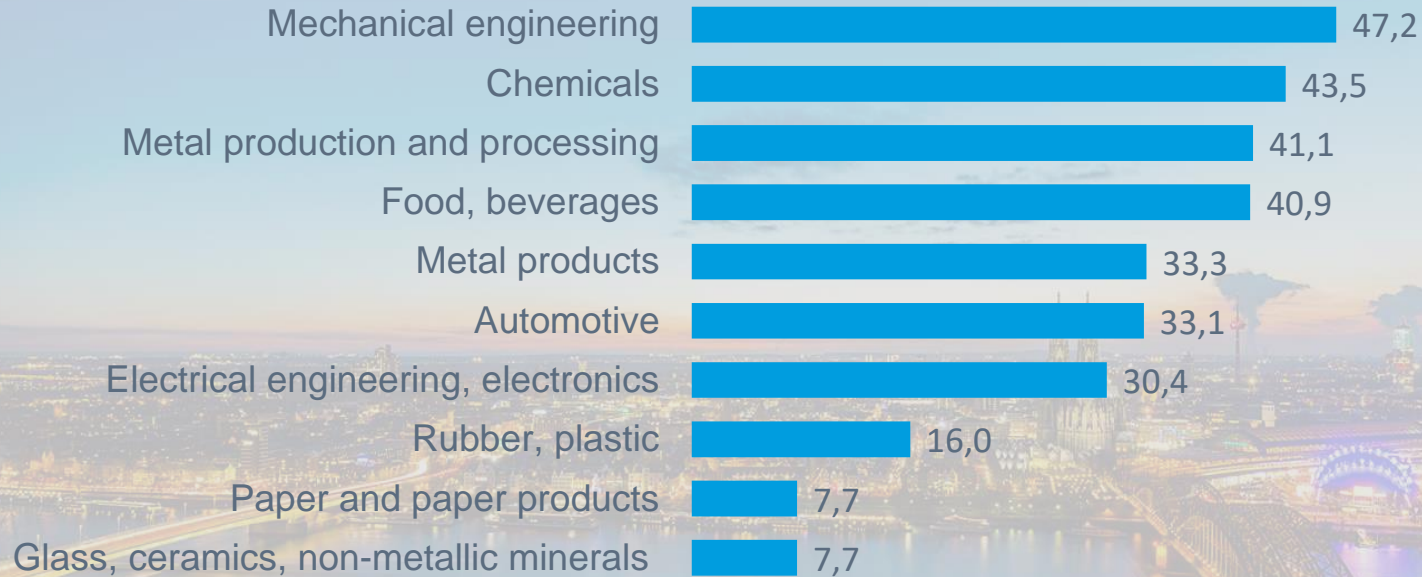


Industrial Heartland

- In 2017, the industrial enterprises based in NRW generated sales of 350 billion euros.
- The biggest industrial employer in NRW is mechanical engineering with approx. 200,000 employees (19.1 percent share of German total)
- 19.7 percent of the employed population of NRW work in the industrial sector.
- With the Ruhr Metropolis as its core, NRW is the strongest industrial region in Europe.

TOP LOCATION FOR MANUFACTURERS AND SUPPLIERS

Sales 2017 (in EUR bn) in NRW's most prominent industries (manufacturing sector)



Source: IT.NRW; the figures refer to companies with 20 and more employees

2. HOME OF THE WORLD MARKET LEADERS



A GLOBAL PLAYER'S PLACE

20 of the 50 top-selling companies in Germany are based in NRW



12 OF THE 40 TOP-SELLING TRADING COMPANIES IN GERMANY ARE BASED IN NRW



Germany's No. 1 trade center

- 12 of the 40 largest retail companies such as Aldi, Metro and Rewe are based in NRW
- Many of the companies are world market leaders and innovators in their segments
- They are magnets for international firms because many investors are looking for cooperation partners in the development of products, production processes, services or research.

3.

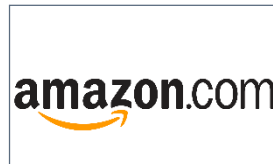
GERMANY'S NO. 1 INVESTMENT LOCATION



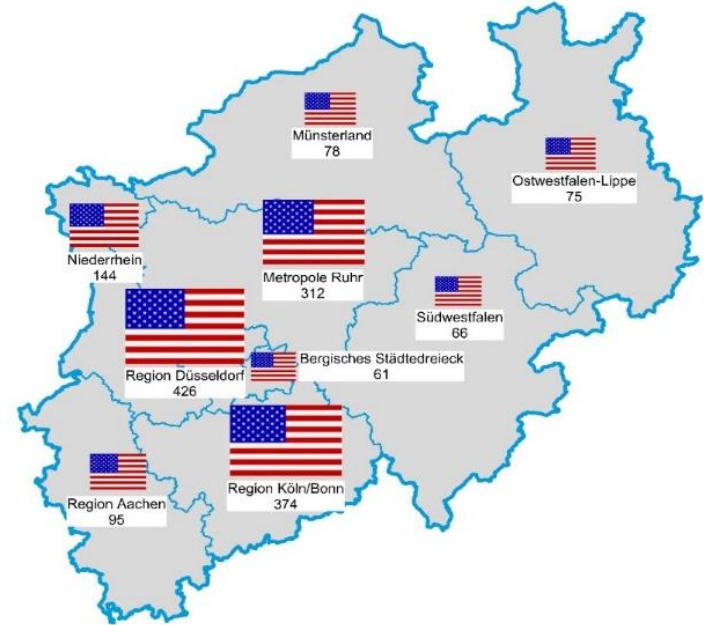
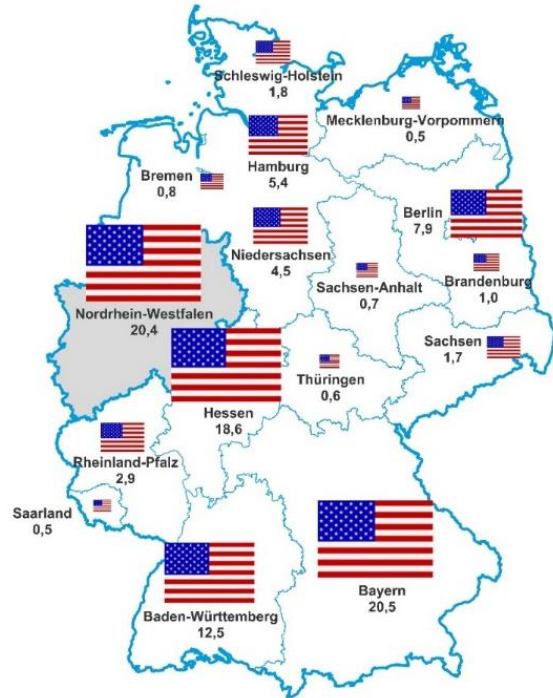
NRW.INVEST
GERMANY

| Germany's no. 1 investment location | 5/1/2018

1700 US-COMPANIES ARE LOCATED IN NRW



DISTRIBUTION OF US-COMPANIES IN GERMANY AND NORTH RHINE-WESTPHALIA

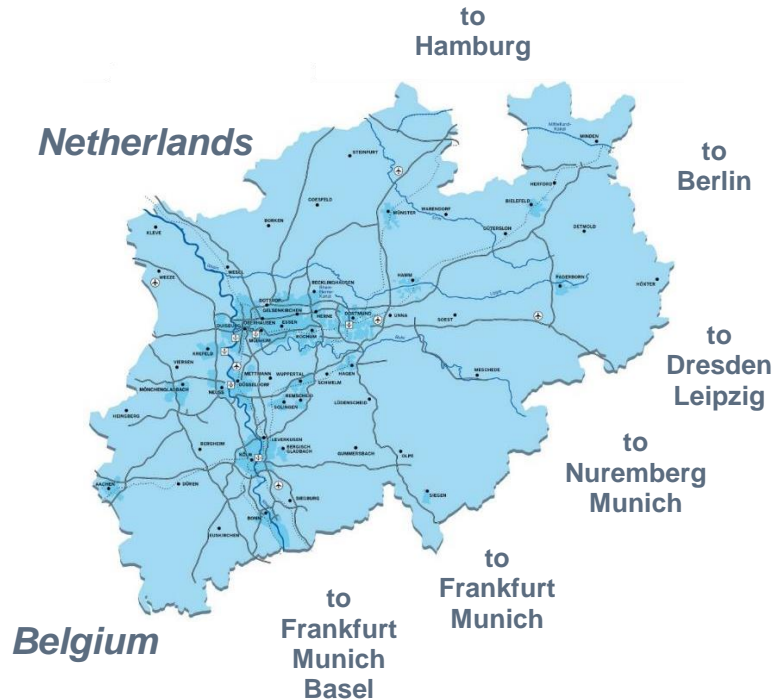


4. EUROPE'S GATEWAY WITH AN EXCELLENT TRANSPORT INFRASTRUCTURE



AdobeStock®

A DENSE ROAD NETWORK GUARANTEES EASY ACCESS TO DOMESTIC AND INTERNATIONAL LOCATIONS



The road network embraces approx. 29,600 kilometers

- 1,800 miles expressways (“Autobahn”)
- 2,800 miles highways
- 6,000 miles local district roads
- 8,100 miles country roads
- Around 17 % of all the expressways in Germany are to be found in NRW.
- The European expressway system can be reached easily from any point in the region.

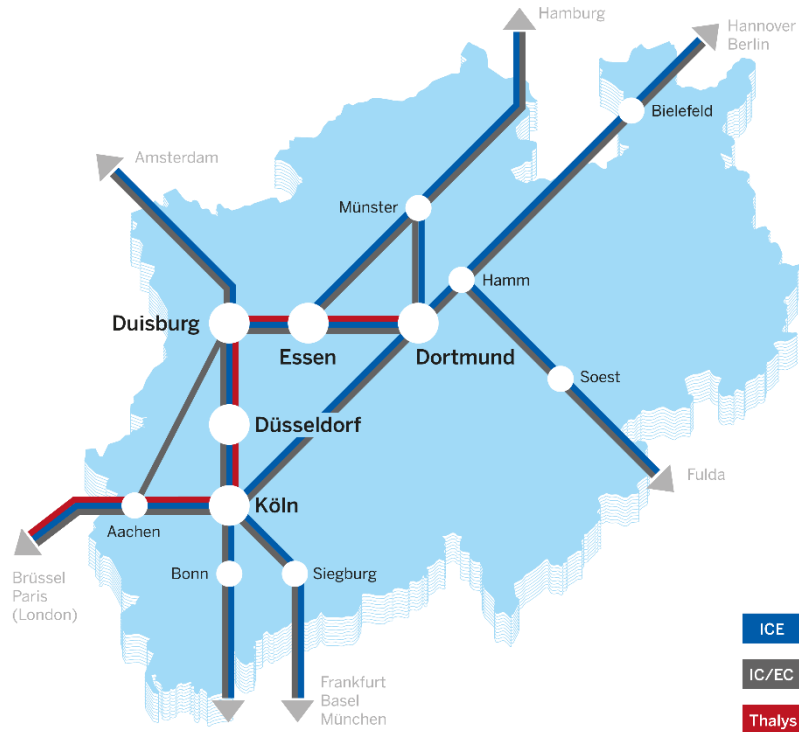
EUROPE'S GATEWAY WITH AN EXCELLENT TRANSPORT INFRASTRUCTURE



Easy to reach – excellent transportation infrastructure


- 2 major international airports as well as 4 airports with European connections
- More than 450 direct flights all over the world
 - 350 flights to Europe
 - 36 flights to Africa
 - 25 domestic flights
 - 22 flights to Asia
 - 17 flights to America
- Cologne/Bonn is Germany's No. 3 air cargo center

BEST RAIL CONNECTIONS



Highest rail network density in Germany

- Track length amounts up to approx. 3,700 miles
- NRW is an important hub in the high-speed rail network.
- The central station in Cologne is one of Europe's busiest rail junctions.
- 1:15 h from Cologne to Frankfurt with ICE
- 27 ICE-stations in NRW



448 miles of
waterways

140 miles of the **River Rhine**, one of the world's busiest waterways, flow through NRW

The world's biggest inland port (Duisburg) and Europe's biggest canal port (Dortmund) are situated right in the center of NRW.

The state's approx. 120 ports handle 128 million tons of goods by ship



5

LOGISTICS COMPETENCE OF WORLD RENOWN

NO. 1 LOGISTICS LOCATION



Logistics competence of world renown

- 24,000 logistics companies with 348,500 employees in NRW.
- Sales of around 68.0 billion euros.
- If the employees with logistics tasks in industrial and trading companies are also added, the figure is over 712,000 employees.
- The Fraunhofer Institute for Material Flow and Logistics **IML** in Dortmund is the largest research institute for logistical topics worldwide

9 OF THE 25 BIGGEST LOGISTIC COMPANIES ARE BASED IN NRW

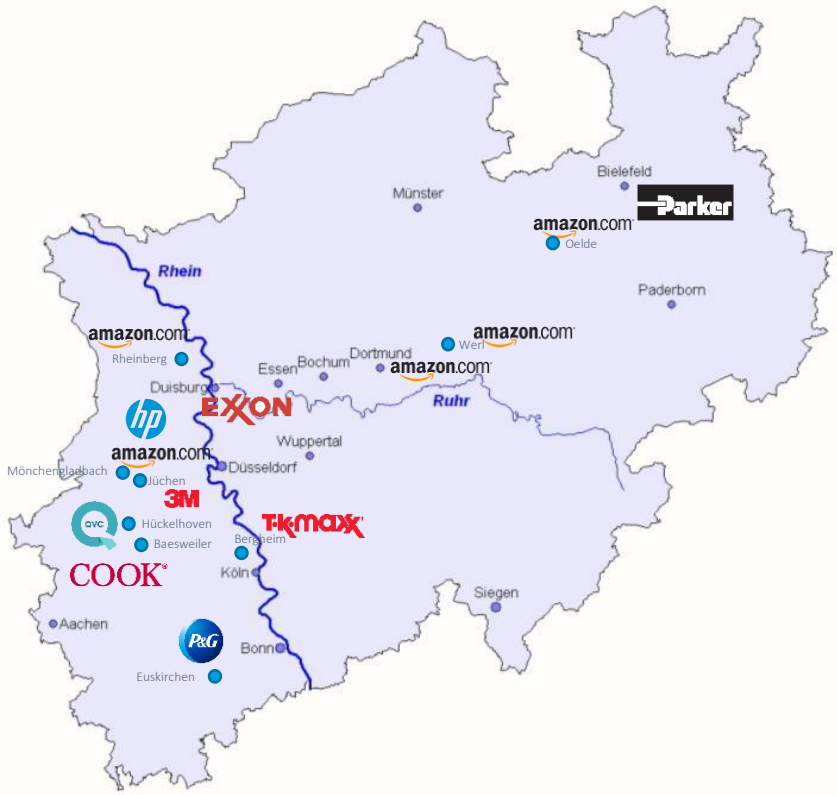
¼ of all logistic centers in Germany are based in NRW

(e.g. Amazon/Rheinberg, AO/Bergheim, Esprit/Mönchengladbach, TK Maxx/Bergheim, Zalando/Mönchengladbach)

Arvato/Bertelsmann, Deutsche Post DHL, FedEx, FIEGE, Rhenus, Schenker and UPS

Every year, 1 million square meters of new logistics space are created in NRW.

MANY AMERICAN COMPANIES LOCATED THEIR DC'S IN NRW



6.

HIGHEST QUALITY OF LIFE



DIVERSE, AMBITIOUS AND UNIQUE



Culture, sports and recreation

- 5 Unesco world cultural heritage sites: Aachen Cathedral, Cologne Cathedral, Castles Augustusburg and Falkenlust / Brühl, Zeche Zollverein, Abbey Corvey
- 80,000 historic monuments
- 22 million guests per year
- More than 900 museums and 130 stages

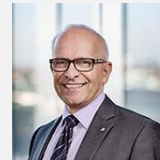
DIVERSE, AMBITIOUS AND UNIQUE



Culture, sports and recreation

- More than 31,000 miles hiking tracks
- 12 nature parks with about 3,200 acres
- 8,700 miles cycling tracks
- 51 star-awarded restaurants
- Lots of events and shopping possibilities

FEEL FREE TO CONTACT US



Stephan Jungen
Projectmanager
North America



Ginta Rose Rubin
Managing
Director

NRW.INVEST GmbH
Economic Development
Agency of the German State
of North Rhine-Westphalia
(NRW)
Völklinger Straße 4,
40219 Düsseldorf, Germany

+49 211 13000-139
jungen@nrwinvest.com
www.nrwinvest.com

**NRW.INVEST (North
America) LLC**
Economic Development
Agency of the German State
of North Rhine-Westphalia
150 North Michigan Avenue,
Suite 2940
Chicago, IL 60601, USA

+1 312 6297500
info@nrwinvestllc.com
www.nrwinvest.com



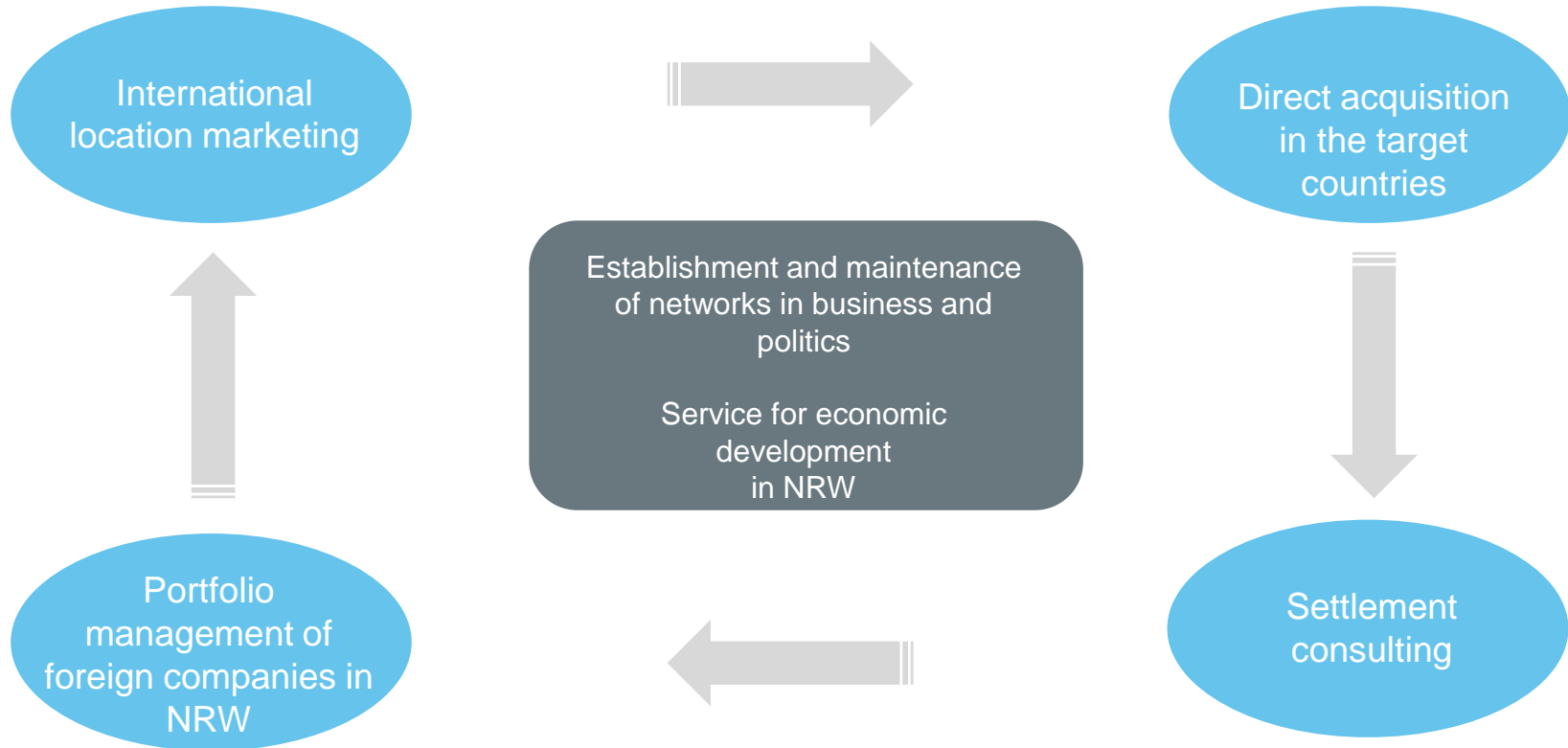
ON THE MARKET FOR OVER 55 YEARS



NRW.INVEST GmbH

- Wholly owned subsidiary of the State of NRW
- Head office in Düsseldorf, founded 1960
- 74 employees
 - 37 in Düsseldorf
 - 37 in the international offices
- Chairman of the Supervisory Board
State Secretary Christoph Dammermann, Ministry of Economic Affairs, Innovation, Digitization and Energy of the State of NRW
- CEO Petra Wassner

AREAS OF EXPERTISE



NRW.INVEST – AREAS OF EXPERTISE

International location marketing	Direct acquisition in the target countries	Settlement consulting	Portfolio management of foreign companies in NRW	Service for economic development in NRW
<ul style="list-style-type: none"> • Events • Press and media relations • Advertising • Online communication • Social media • (Digital) Publications • International location marketing campaign "Germany at its best: Nordrhein-Westfalen" 	<ul style="list-style-type: none"> • Desk research and analyses of industries and clusters • Identification of potential investors in an industry or cluster • Individualized active company approach • Targeted presentations for direct approach • Acquisition concepts/ FDI reporting/ databases 	<p>Prior to settlement</p> <ul style="list-style-type: none"> • Location/industry presentations • Location selection <p>During settlement</p> <ul style="list-style-type: none"> • Authorities guide • Moderation of round tables • Support with financing and funding issues 	<p>Following settlement</p> <ul style="list-style-type: none"> • Key account management • Accompaniment of expansion investments • Maintaining contacts with diplomatic representations and business organizations from the target countries • Dialog events and NRW.INVEST AWARD 	<ul style="list-style-type: none"> • Cooperation with the economic development bodies and institutions • Joint projects with the economic development agencies in NRW • Further education program for municipal economic development • NRW.INVEST economic development certificate • Newsletter INFO.KOMM and Knowledgebase NRW • International site marketing

INTERNATIONAL LOCATION MARKETING



Instruments: events, press and media relations, advertising

Events

- Realization of events such as investment seminars, specialist forums, symposia
- Visits to trade fairs, congresses and specialist events

Press and media relations

- Press release, interviews
- Press meetings and conferences
- Journalist trips
- Media cooperations

Advertising

- Ad and banner placements
- Digital marketing
- Advertorials