

# New opportunities in NRW

Your No.1 investment  
location in Germany





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## North Rhine-Westphalia – economic center in the heart of Europe

**North Rhine-Westphalia (NRW) is located in the center of Europe and borders on the Netherlands and Belgium. It is the most populous and the most densely populated of the 16 federal states in Germany.**

17.9 million people live on an area of 34,112 square kilometers. With 526 people per square kilometer, the state is more densely populated than Japan or the Netherlands. The largest cities are Cologne, Düsseldorf, Dortmund, Essen and Duisburg. The most important metropolitan areas are the Ruhr Metropolis with 5.1 million inhabitants and the region along the Rhine with more than 3.0 million inhabitants.

More than 160 million people live within a 500-kilometer radius of the state capital, Düsseldorf. This represents nearly one third of all consumers in the EU. From no other location in Europe can so many people with such high purchasing power be reached within such short distances as from NRW. The state bundles 21.5 percent of Germany's purchasing power. The inhabitants of NRW alone spend 372.0 billion euros on private consumption every year.

Facts	Total	Percentage of german total
Surface area	34,112 sq. km	9,5 %
Population	17.9 mill.	21,6 %
Population density	526 inhabitants per sq. km	
Gainfully employed	9.6 mill.	21,5 %
Gross domestic product	711.4 bn eur	20,7 %
GDP per capita	39.678 eur	
Private consumption	372.0 bn eur	21,8 %
Exports	193.7 bn eur	14,6 %
Imports	245,5 bn eur	21,1 %
Foreign direct investment*	162.5 bn eur	21,2 %

\*End of 2018



• Reykjavík

• Dublin

• London

• Amsterdam

• Brussels

• Paris

• Düsseldorf

• Luxembourg

• Bern

• Madrid

• Lisbon

• Oslo

• Stockholm

• Copenhagen

• Berlin

• Warsaw

• Prague

• Vienna

• Ljubljana

• Rome

• Helsinki

• Tallinn

• Riga

• Vilnius

• Minsk

• Moscow

• Kiev

• Budapest

• Zagreb

• Sarajevo

• Belgrade

• Sofia

• Bucharest

• Tirana

• Athens

• Istanbul

• A

• St. Petersburg

## Dynamic economic location

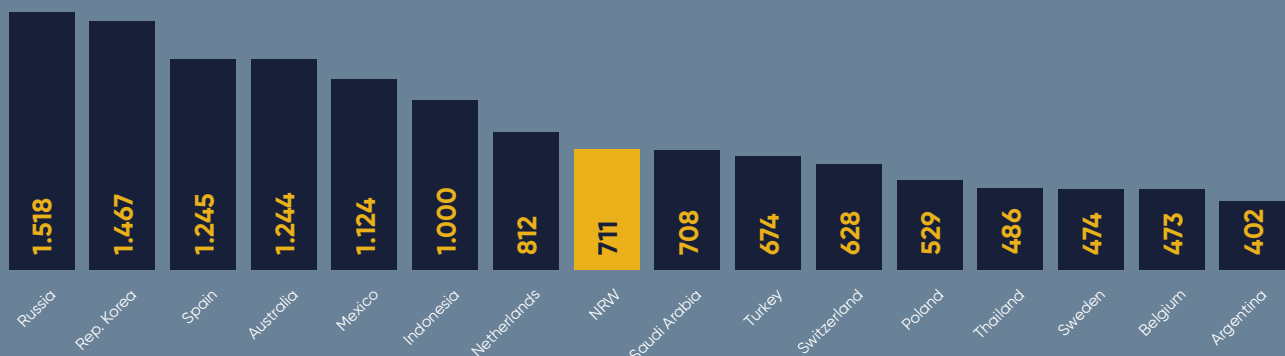
**The economy in NRW is booming: In terms of numerous economic indicators, the state is one of the world's leaders.**

More than 711 billion euros, NRW generates 20.7 percent of the German gross domestic product (GDP), putting it clearly ahead of all the other federal states. The per capita GDP amounts to 39.678 euros and per employed person to an average of 73.832 euros.

The state also impresses on an international level: NRW generates 4.4 percent of the European GDP (EU-28), making it one of Europe's most important economic regions. In the international ranking, the federal state is placed higher than other European states such as Switzerland, Sweden, Poland and Belgium.

### GDP in international comparison

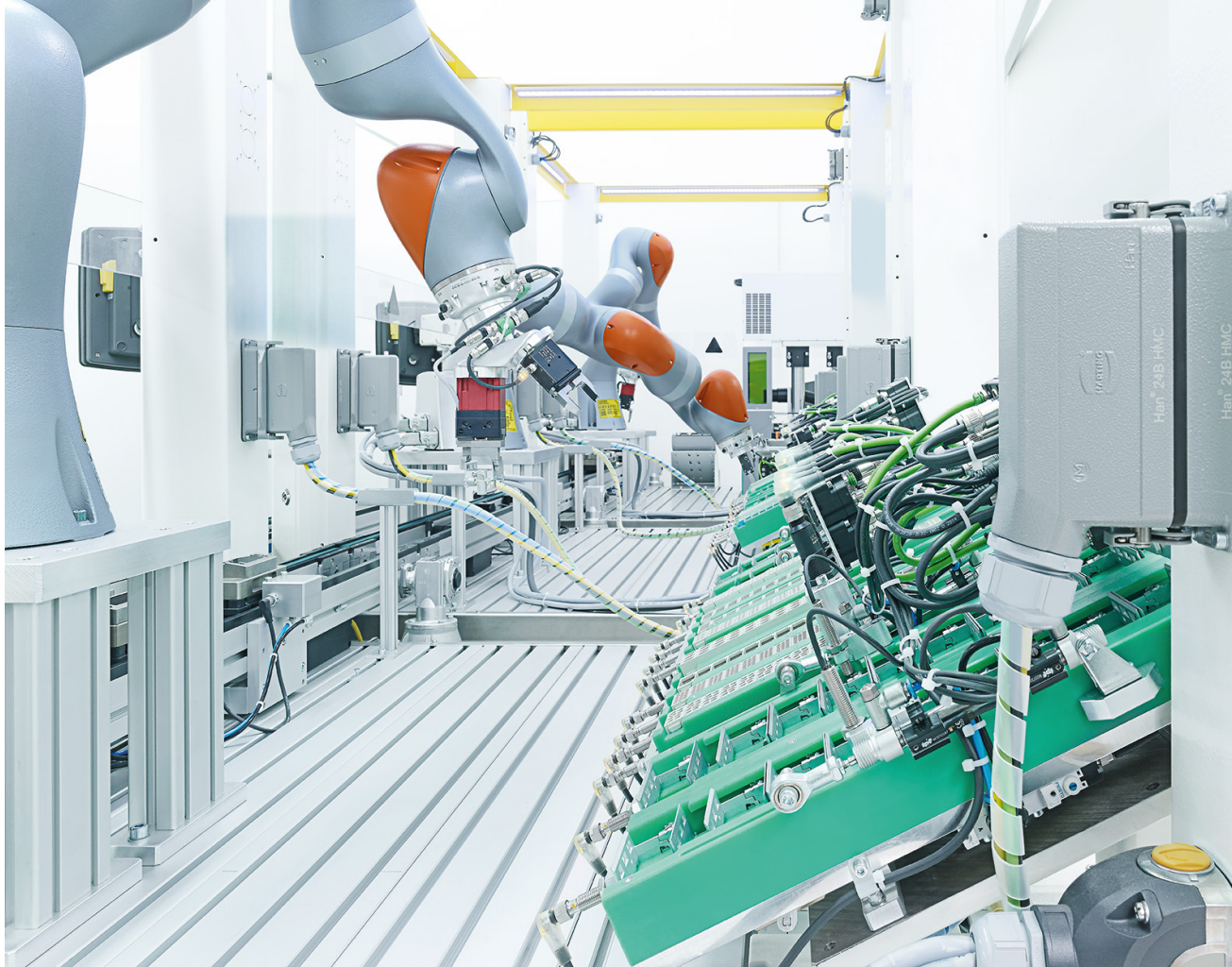
Source: World Bank, 07/2020, figures in billion euros 2019



### Germany's industrial heartland

The industrial companies in North Rhine-Westphalia generated around 352 billion euros in 2019. 18 of the 50 highest-grossing German companies have their headquarters in NRW, e.g. Bayer, Bertelsmann, Deutsche Post, Deutsche Telekom, E.ON, Henkel, Metro, Rewe, RWE and thyssenkrupp. With the Ruhr Metropolis and South Westphalia in particular, the state is home to the strongest industrial regions in Europe. NRW's industry accounts for more than 27.0 percent of the state's gross value added – and nearly 18.8 % of Germany's gross value added.





The family-owned company HARTING in East Westphalia-Lippe is one of the world's leading suppliers of industrial connection technology.

### **Home of the world market leaders**

One out of four German world market leaders comes from NRW. These include not only large, world-renowned industrial companies, but also dozens of smaller hidden champions from all sectors of the economy that are leaders in their fields of business. Around 711.600 small and medium-sized enterprises form the economic backbone of the state. This broad economic base produces top achievements. Many of the companies are attractive cooperation partners for international investors in the development of products and production processes, in service or research.

The North Rhine-Westphalian economy also enjoys success in the immediate vicinity of industry: Nowhere else in Germany do business-related service providers, such as consulting firms, IT or R&D service providers contribute as much to innovation and value creation as in NRW.

## Europe's largest sales and sourcing market

**Foreign trade in NRW is growing continuously and is increasingly becoming a driver of growth and employment in the state.**

The NRW economy maintains close trade relations with the whole world.

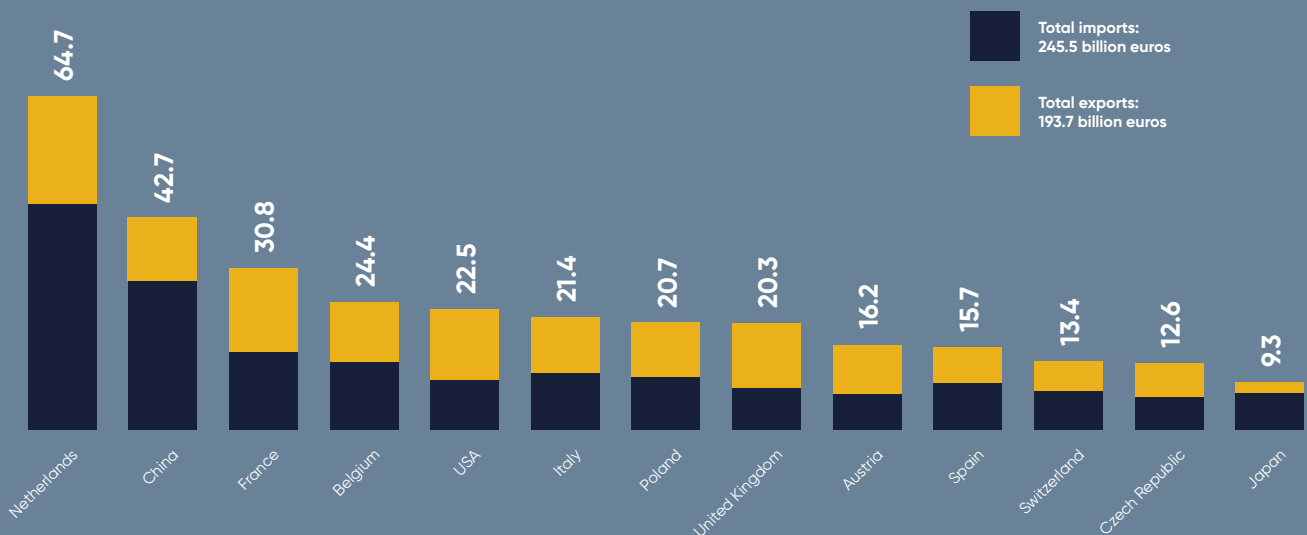
The total trade volume of the state amounts to 439 billion euros – no federal state achieves a higher figure.

14.6 percent of German exports are produced in NRW. 22.0 percent of all German imports go to Germany's most populous state. In 2019, the value of exports amounted to 193.7 billion euros and imports to 245.5 billion euros.

NRW is an attractive location for retail groups: 13 of the 40 highest-grossing retail companies in Germany are based here, including well-known names such as Aldi, C&A, Deichmann, Metro, Rewe, Galeria Karstadt-Kaufhof and Tengelmann.

The most important trading partners in 2018 (in EUR bn)

Source: IT.NRW, March 2019



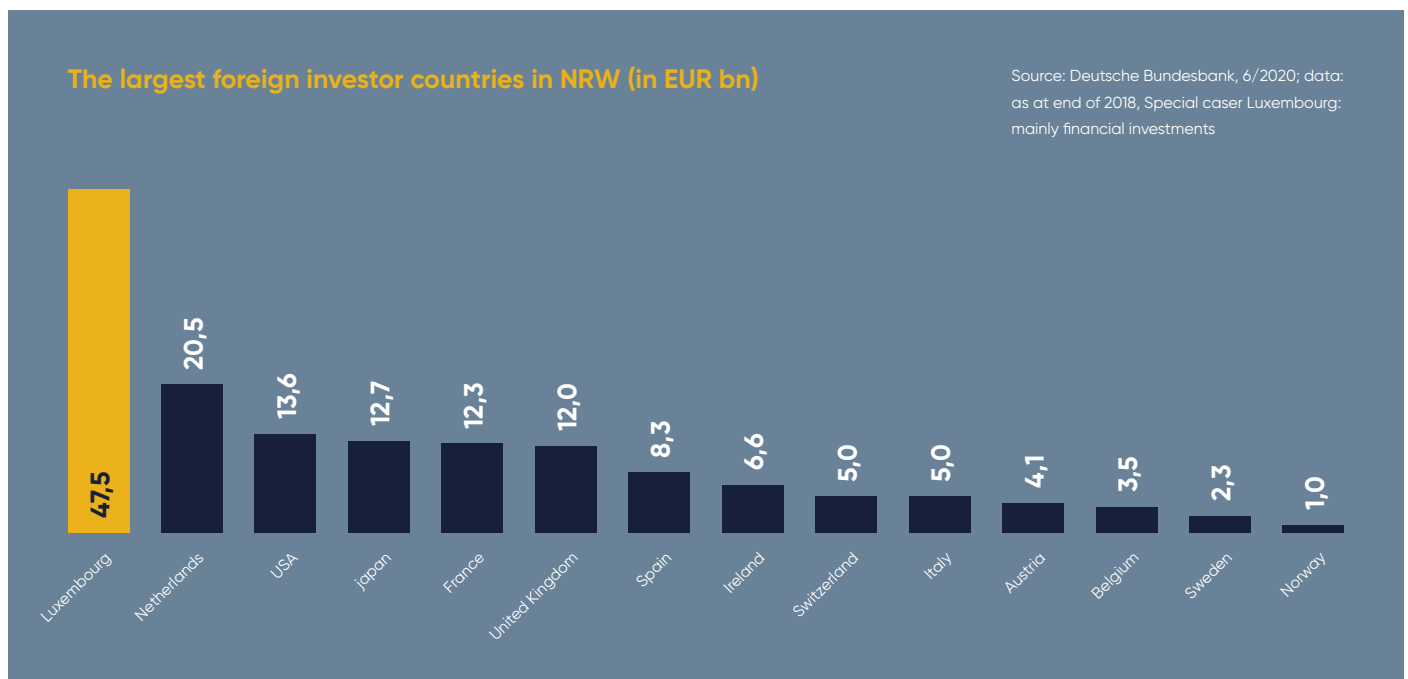


# No. 1 investment location in Germany

## NRW- Center for renowned foreign companies in Germany

NRW has been gaining in attractiveness for foreign investors for years. More than 20,000 foreign companies from the most important investor countries control their German or European activities from NRW – this equates to one fifth of all multinational enterprises in Germany as a whole.

These include global players such as 3M, BP, Ericsson, Ford, Fujifilm, Huawei, QVC, Toyota, UPS and Vodafone. Foreign companies have developed into an important employer in the state, employing around one million people.



Alongside the many compelling economic and infrastructure-related arguments in favor of North Rhine-Westphalia, NRW stands out on account of its cosmopolitan atmosphere and hospitality. Cultural diversity is a defining feature of NRW. With foreign banks, lawyers, schools, supermarkets and cultural centers, North Rhine-Westphalia offers a diverse international infrastructure that is constantly evolving. Due to these favorable conditions, foreign investors feel at home in NRW, both culturally and economically.

## Overview of important industries



### Automotive

NRW is one of the most important automotive locations in Germany. The sector is broadly diversified in all areas, from internationally active corporate groups in conventional vehicle construction to a supply industry that is strongly characterized by medium-sized companies. Companies and science in NRW are intensively researching tomorrow's drive technology – electromobility. An internationally renowned research landscape with a high level of manufacturing know-how, a strong industry and funding by the state and federal governments have made the state a top location in the field of e-mobility.

Companies: Benteler, Daimler, Ford-Werke, HELLA, thyssenkrupp Automotive Systems

[www.elektromobilitaet.nrw.de](http://www.elektromobilitaet.nrw.de)

### Chemicals

The chemical location NRW is characterized by first-class research and a mix of broad mid-market and numerous international corporations. As a central supplier of materials, new developments in the chemical industry stimulate a high proportion of innovations in many other value-added chains: It is therefore regarded as an important innovation driver for the entire industry.

Companies: ALTANA, Bayer, Covestro, Evonik Industries, Henkel, LANXESS

[www.nrw.vci.de](http://www.nrw.vci.de)

### Energy

NRW is Europe's most important energy region – with internationally active energy suppliers, power plant builders, as well as numerous developers, suppliers and users of new energy technologies and services. The state's long tradition of using natural resources has grown into a broad energy technology expertise. This includes a dense network of research facilities as well as a large number of companies offering innovative energy products and services for increasing energy efficiency and the use of renewable energies.

Companies: E.ON, RWE, Vaillant, Winergy

[www.energieregion.nrw.de](http://www.energieregion.nrw.de)

### HealthCare

With more than 1.6 million employees, the healthcare industry in NRW is regarded as a growth and innovation engine. The companies from NRW hold a leading international position in medical technology in particular. The state's healthcare industry is also characterized by a broad-based pharmaceutical industry with numerous global players.



Companies: 3M, Bayer, Janssen-Cilag, Medifa, Medtronic, Sarstedt  
[www.lzg.nrw.de](http://www.lzg.nrw.de)

#### Information and communication technology (ICT)

In a dynamic environment, the ICT sector in NRW is shaping the future with Cyber Physical Systems – intelligent networked systems that facilitate tomorrow's smart products and services such as Industry 4.0, smart grids and e-mobility. No other German state has such a high density of companies in this sector: from medium-sized IT companies to software startups and telecommunications giants.

Companies: Atos, Computacenter, Deutsche Telekom, Ericsson, Fujitsu, HP, Huawei Technologies, IBM, Itelligence, Materna, Toshiba, Vodafone

[www.cps-hub-nrw.de](http://www.cps-hub-nrw.de)

#### Plastics

With its cross-sectional character, the plastics industry in North Rhine-Westphalia is regarded as a driving force in the fields of materials and production processes as well as for products in almost all areas of life. A continuous value-added chain of plastics manufacturers, plastics processors and manufacturers of plastic-processing machinery and a broad scientific, research and service landscape are proof of the excellence of the industry, which in this concentration and composition is unique in Europe.

Companies: Covestro, ENGEL, Evonik Industries, Coko-Werke, Gerhardt Kunststofftechnik, LANXESS, Murtfeldt Kunststoffe, Reifenhäuser

[www.kunststoffland-nrw.de](http://www.kunststoffland-nrw.de)

#### Logistics

Numbering 24,000 companies, the logistics industry is one of the leading growth sectors in NRW. With its outstanding transport infrastructure, the state is considered the most important logistics location in Europe. Competence Network Logistik.NRW and regional networks offer specific platforms for many industry topics. Newly established logistics companies will find competent partners for numerous fields here.

Companies: 3M, Amazon, DHL, FedEx, Fiege, Esprit, IKEA, Kühne + Nagel, Rhenus, Schenker, Seacon Logistics, TNT, UPS

[www.logit-club.de](http://www.logit-club.de)



#### Mechanical engineering

Mechanical engineering is a core area of the economy in NRW and, with more than 200,000 employees, the largest industrial employer. Numerous hidden champions develop highly specialized products in their markets, for which they are known internationally. In addition, industry and science in NRW are driving the development of Industry 4.0. The industrial landscape forms an attractive market for innovative solutions for the digitization of the entire value chain. NRW is also home to strongly developed research expertise. In the unique technology network Intelligent Technical Systems East Westphalia-Lippe (it's OWL) technology leaders and cutting-edge research institutions cooperate to ensure growth and employment and to contribute to safeguarding production in Germany.

Companies: Claas, Deutz, DMG Mori, GEA, Harting, Phoenix Contact, SMS

[www.produktion.nrw.de](http://www.produktion.nrw.de), [www.its-owl.de](http://www.its-owl.de)

#### Future technologies

With its outstanding research facilities and its corporate landscape, NRW is one of the world's most competitive economic areas in the fields of nanotechnology, microsystems technology and new materials.

Companies: 3M, Aixtron, AMO, AUNDE, Bayer, Boehringer Ingelheim microParts, ELMOS, Evonik Industries, Hydro Aluminium, LIMO, NanoFocus, Saertex, thyssenkrupp

[www.nmwp.nrw.de](http://www.nmwp.nrw.de)

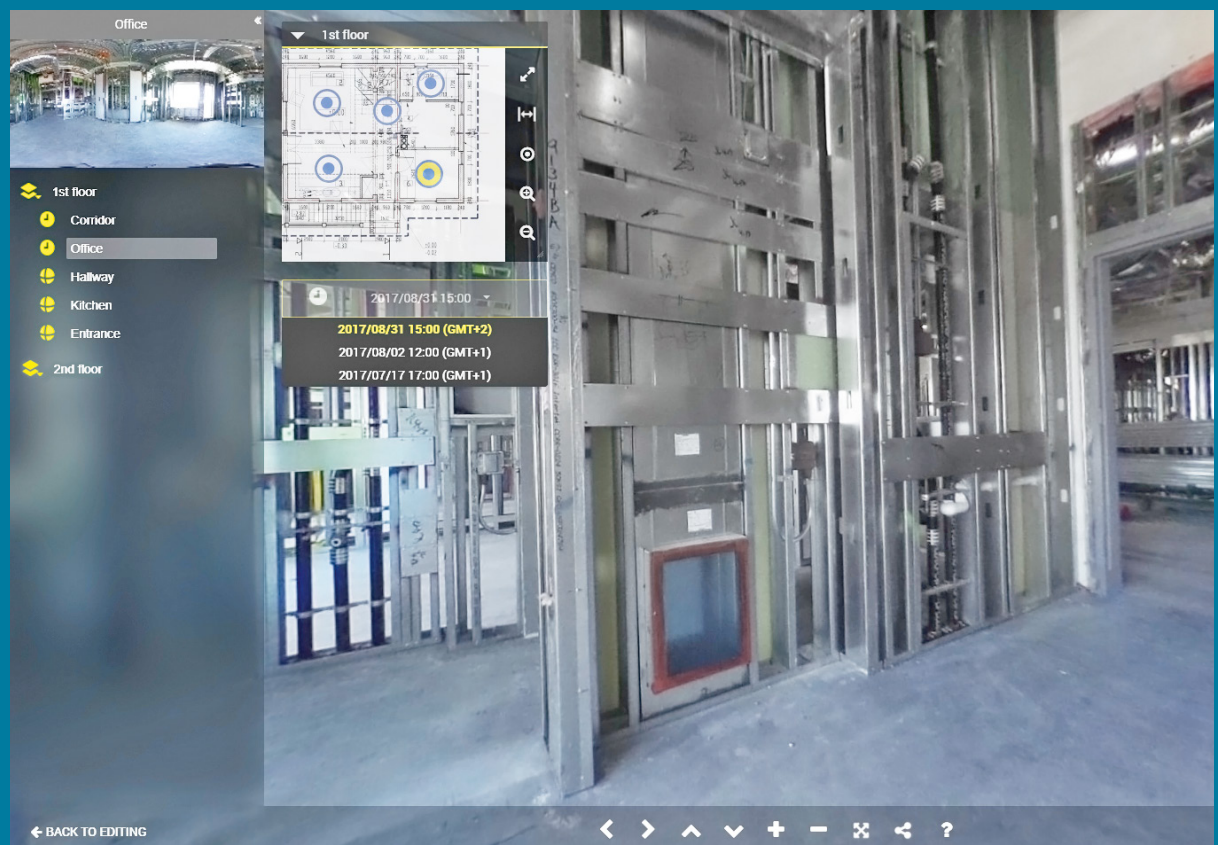
## Investment opportunities in the digital revolution

**NRW is not only the beating heart of the German economy – the state is on the verge of becoming the leading location for the digital economy in Germany.**

NRW boasts excellent framework conditions for the digital transformation of the entire value chain. With its high density of industrial and commercial enterprises and around 711.600 medium-sized companies, the location provides numerous customers and cooperation partners for digital technologies. As a provider of intelligent software and hardware components, the state's strong ICT sector is also a major driver of digital change.

Bitstars, a spin-off of RWTH Aachen University, profits in NRW from the strong industrial landscape as a buyer for its products. The startup's success story began with augmented reality applications for mobile devices. Later, 3D developments followed which are used in the construction or operation of industrial plants. With international success – Bitstars now has a branch in Silicon Valley.

Bitstars: Successful startup from NRW







### **Every fifth German startup comes from NRW**

The excellent market prospects are accelerating the development of the ecosystem for startups. Around 20 percent of all German startups are now at home in NRW, and the trend is rising. Here they have the best prerequisites for growth: local proximity to customers, political support, a multitude of scene networks and a considerable pool of skilled workers.

Numerous incubators support startups in the seed and startup phase with work space and qualification measures. Six regional digital hubs in Aachen, Bonn, Düsseldorf/Rhineland, Cologne, Münsterland and the Ruhr Metropolis link startups with SMEs and large industrial companies, among others. And more and more NRW companies such as E.ON, Haniel, innogy and Metro Group are also developing their own accelerator concepts in order to invest in innovative business models.

### **Outstanding talent pool**

The state's universities train 90.400 students in the field of computer science and electrical engineering – they contribute core competencies for the digital economy. It is therefore not surprising that companies in the digital economy in NRW are able to cover three-quarters of their personnel requirements with locally sourced employees.

The talent pool in NRW is a key reason why the online travel portal Trivago NRW has remained faithful to the state. The Düsseldorf-based company is one of the biggest success stories of the German startup scene: Since its foundation in 2005, Trivago has developed into the world's largest hotel search engine. Although the company is listed on the stock exchange in the USA following its acquisition by investor Expedia, Trivago is expanding its headquarters in Düsseldorf. This is because the Group can attract enough employees here to cater for its enormous growth.

The research landscape in NRW also focuses on all the main topics of digital transformation: from Big Data, Industry 4.0, CPS and Smart City to IT Security, IoT, Logistics, Energy and Robotic/KI.



## Gateway to Europe with excellent transport infrastructure

NRW stands for mobility in all dimensions: In almost no other region in Europe will companies find better conditions for transport and logistics.

### Dense freeway network

- More than 2,200 kilometers of freeway
- 17,600 kilometers of federal and state roads
- Optimal connection to the European freeway network

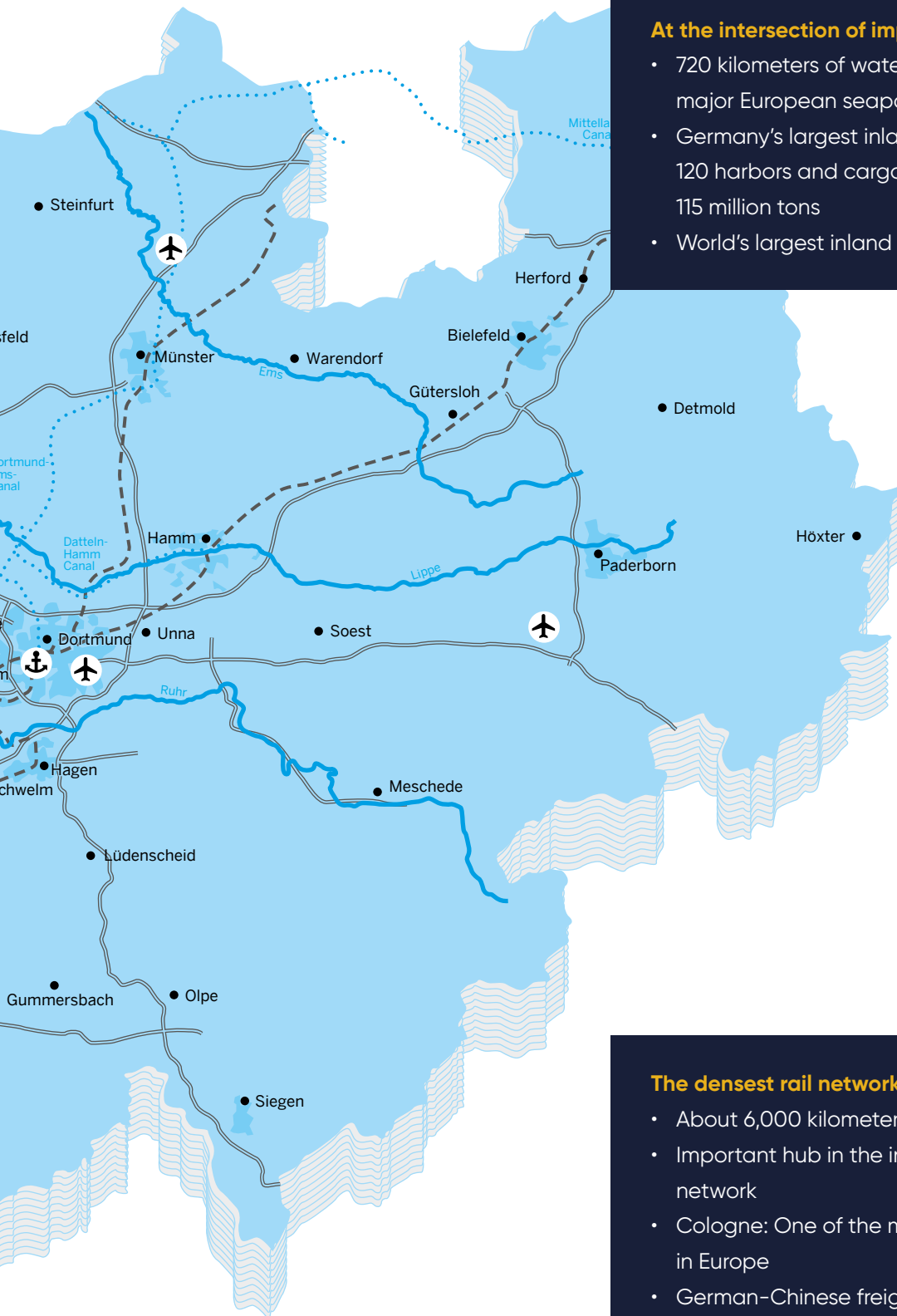
Düsseldorf Airport: mehr als 200 Flugziele weltweit



### All over the world from six airports

- Two major international airports – Düsseldorf Airport
- and Cologne Bonn Airport – and four other airports with European connections
- Nearly 450 direct flights worldwide
- Düsseldorf Airport: Germany's third largest passenger airport with connections to 190 destinations worldwide
- Cologne/Bonn Airport: Germany's No. 3 air cargo center





### At the intersection of important European waterways

- 720 kilometers of waterways with connections to major European seaports
- Germany's largest inland port location with around 120 harbors and cargo handling volume of nearly 115 million tons
- World's largest inland port in Duisburg

### The densest rail network in Germany

- About 6,000 kilometers of track
- Important hub in the international high-speed network
- Cologne: One of the most-frequented railway hubs in Europe
- German-Chinese freight train connection Yuxinou between Duisburg and Chongqing: "New Silk Road"

## Logistics expertise of world repute

Fraunhofer Institute for Material Flow and Logistics (IML); one of the most important research institutes for logistics worldwide



**The World Bank has repeatedly named Germany the world logistics champion – the advantages of NRW as a logistics location make a major contribution to this.**

Germany owes the most efficient logistics infrastructure in the world to the state of North Rhine-Westphalia. 24,000 logistics companies with 364.000 employees generate annual sales of 68 billion euros in NRW. Its central location, excellent infrastructure and large market volume attract international investors. Of the top 25 largest logistics companies in Germany, nine are headquartered in NRW, including Deutsche Post DHL, FedEx, Fiege, Rhenus and UPS Deutschland.

With the free commercial site portal [GERMAN.SITE](#), [NRW.INVEST](#) supports investors in their search for suitable space for their investment projects in NRW.

### **Sites for the logistics industry**

No other region can boast so many commercial zones connected to high-performance transport networks. Around a quarter of all logistics centers in Germany are located in NRW, including the distribution centers of global players such as Amazon, Esprit, TKMaxx and Zalando.

### **WORLD CLASS IN RESEARCH AND DEVELOPMENT**

NRW is the state of highly qualified academics and specialists. The densest research network in Europe also provides the best conditions for innovation and technology transfer.



## World class in research and development

NRW is the state of highly qualified academics and specialists. The densest research network in Europe also provides the best conditions for innovation and technology transfer.

More than 773,000 students study at 70 universities and universities of applied sciences, creating a highly qualified workforce for companies in Germany and abroad. More than one in four academics in Germany is trained in NRW. Six of Germany's ten largest universities are located in the state, including the elite universities RWTH Aachen and Cologne as well as the FernUniversität Hagen.

Over 60 technology centers and more than 50 non-university research institutes form one of the densest research networks in Europe. Research facilities include internationally renowned institutions such as the Forschungszentrum Jülich, the German Aerospace Center and 14 Fraunhofer and twelve Max Planck Institutes.

RWTH Aachen University is one of the world's leading technical universities.



## Surprisingly diverse

**NRW also offers abundant scope for variety and inspiration outside the business world. That's why the state is one of the most popular tourist destinations in Germany, with over 23 million guests per year.**

NRW impresses with five UNESCO World Heritage Sites. Cologne Cathedral is the No. 1 tourist attraction with 6.5 million visitors per year. Aachen Cathedral is an important testimony to Carolingian architecture, and the castles of Augustusburg and Falkenlust near Brühl, with their architecture, paintings and gardens, are considered to be masterpieces of German rococo art. The Zollverein colliery in Essen is one of the most impressive industrial monuments in Europe. In the summer of 2014, the Corvey Monastery in Höxter in Westphalia, one of the most important Carolingian monasteries, was added the list.

### **First-class cultural offerings**

In addition, more than 900 museums and 130 theater venues make NRW, along with Paris and London, one of the most diverse cultural regions in Europe. For example, the Kunstsammlung NRW in Düsseldorf shows works by the most important artists of the twentieth century and the Museum Ludwig in Cologne houses one of the most important collections of contemporary art in Europe.

Cologne Cathedral:  
the most popular  
tourist attraction in  
Germany







In addition, the world's oldest art fair, ART COLOGNE, takes place in Cologne every year. Music and theater enthusiasts get more than their money's worth in renowned venues such as Bochum, Cologne or Essen as well as in numerous concert halls and opera houses. In addition, NRW has a huge selection of festivals and concerts ranging from jazz, rock and pop to well-known musicals.

### **Recreation – something for everyone**

The region's shopping facilities are also attract visitors from all over the world. The state offers by far the highest density of highly frequented shopping streets. The state's cultural heritage also extends to culinary delights. Star chefs of world acclaim do full justice to their name here – 47 restaurants with stars are to be found in NRW.

Of course, people can also spend their leisure time in completely different ways. Around 14,000 kilometers of cycle paths, more than 50,000 kilometers of hiking trails and more than 100 bathing lakes provide ample scope for outdoor activities. Fourteen nature parks cover around 40 percent of the state's total area and NRW's first national park is to be found in the Eifel. In the Sauerland region, the largest skiing area north of the Alps attracts hundreds of thousands of winter sports enthusiasts every year.

In NRW, you can also watch top-class professional sport. Nowhere else is this more evident than in football: A comparable density of football arenas, top clubs and fans worldwide is hard to find anywhere else. NRW has also made a name for itself organizing and staging major sporting events. The Tour de France, the world's largest and most famous cycling race, started in the state capital Düsseldorf in 2017.

## NRW.Global Business – trade & investment agency

**Invest in North Rhine–Westphalia, expand worldwide:** The state-owned foreign trade promotion agency NRW.Global Business is the partner for all companies when it comes to investment projects and settling in North Rhine–Westphalia, developing growth markets and networking with international business partners. As Germany's leading business location, the state is in demand among foreign investors worldwide and is also home to numerous companies with global growth potential.



### **Invest in North Rhine–Westphalia**

NRW.Global Business conducts international location marketing for Germany's No. 1 investment location, North Rhine–Westphalia, and promotes foreign direct investment here worldwide. Today, some 20,000 foreign companies are already based in Germany's economically strongest federal state. The experts at NRW.Global Business support investors in tax and legal matters and provide detailed information on the economic structure and industry clusters. They analyze investment plans, identify suitable locations and accompany an investment project from the first step to successful settlement and beyond.

### **Profit from the network**

With its international offices abroad, the company is represented in future markets around the globe. In addition to subsidiaries in Japan and the USA, NRW.Global Business maintains representative offices in China, the United Kingdom, India, Israel, Korea, Poland, Russia and Turkey. Working together with the headquarters in Düsseldorf, the foreign offices support companies in investment projects in North Rhine-Westphalia and identify growth potential for North Rhine-Westphalian companies in international markets. At the same time, the network facilitates direct exchange with companies and investors who wish to benefit from the strength and innovative power of North Rhine-Westphalia.

### **Tap into growth markets**

From start-ups to SMEs: NRW.Global Business supports the North Rhine-Westphalian economy in opening up international markets. Together with its partners, the agency develops foreign trade measures that are specially tailored to the requirements of the companies.

### **From trade fairs to trade missions**

Trade fairs abroad offer perfect access to new markets and a broad professional audience. NRW.Global Business helps companies to present their products and services here in the best possible way – via joint company stands, information service centers or small groups. The company also organizes and coordinates delegation trips and trade missions to growth markets. Numerous other sector information and cooperation events organized by NRW.Global Business offer companies additional support in setting up and expanding their foreign business.

NRW.Global Business works closely with local and regional economic development agencies in the state, the state government of North Rhine-Westphalia, as well as with companies, associations, chambers of industry and commerce, chambers of skilled trades, clusters, state initiatives and other business-related associations. The state government of North Rhine-Westphalia, represented by the Minister of Economic Affairs, Innovation, Digitization and Energy of the State of NRW, is the sole shareholder.

### **Legal Notice**

#### **Published by:**

NRW.Global Business GmbH  
Trade & Investment Agency  
of the German State of  
North Rhine-Westphalia (NRW)  
Völklinger Straße 4  
40219 Düsseldorf, Germany  
Phone +49 211 130000  
E-Mail [nrw@nrwglobalbusiness.com](mailto:nrw@nrwglobalbusiness.com)  
[www.nrwglobalbusiness.com](http://www.nrwglobalbusiness.com)

#### **Responsible:** (acc. to press law)

Annette Peis, General Manager Marketing

#### **Position as at:** November 2020

#### **Verantwortlich:** (V.i.S.d.P.)

Annette Peis, Bereichsleiterin Marketing/Presse  
Stand: November 2020

**Picture credits:** Cover: NRW.Global Business, P. 2: DIE PR-BERATER; P. 7: NRW.Global Business, P. 10: oben links: thyssenkrupp, P. 10 darunter: NRW.Global Business, P. 11: NRW.Global Business, P. 12 bitstars/HoloBuilder, P. 13: trivago, P. 14: Ansgar M. van Treeck, Düsseldorf Airport, P. 16: Fraunhofer IML, P. 17: rcfotostock, P. 18: NRW.Global Business, P. 19: Atelier Brückner/Nikolai Wolff



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