

BUSINESS OPPORTUNITIES IN THE GERMAN MARKET

WARSZAWA, 12 SEPTEMBER 2017

Claudia Grüne
Manager Investor Consulting
Machinery & Equipment, Industrie 4.0
www.gtai.com

Agenda

1. Introduction
2. The Machinery & Equipment Industry in Germany
3. How Germany Trade & Invest can help you

What we do



International marketing of Germany as a business and technology location



Economic promotion of the new federal states and Berlin



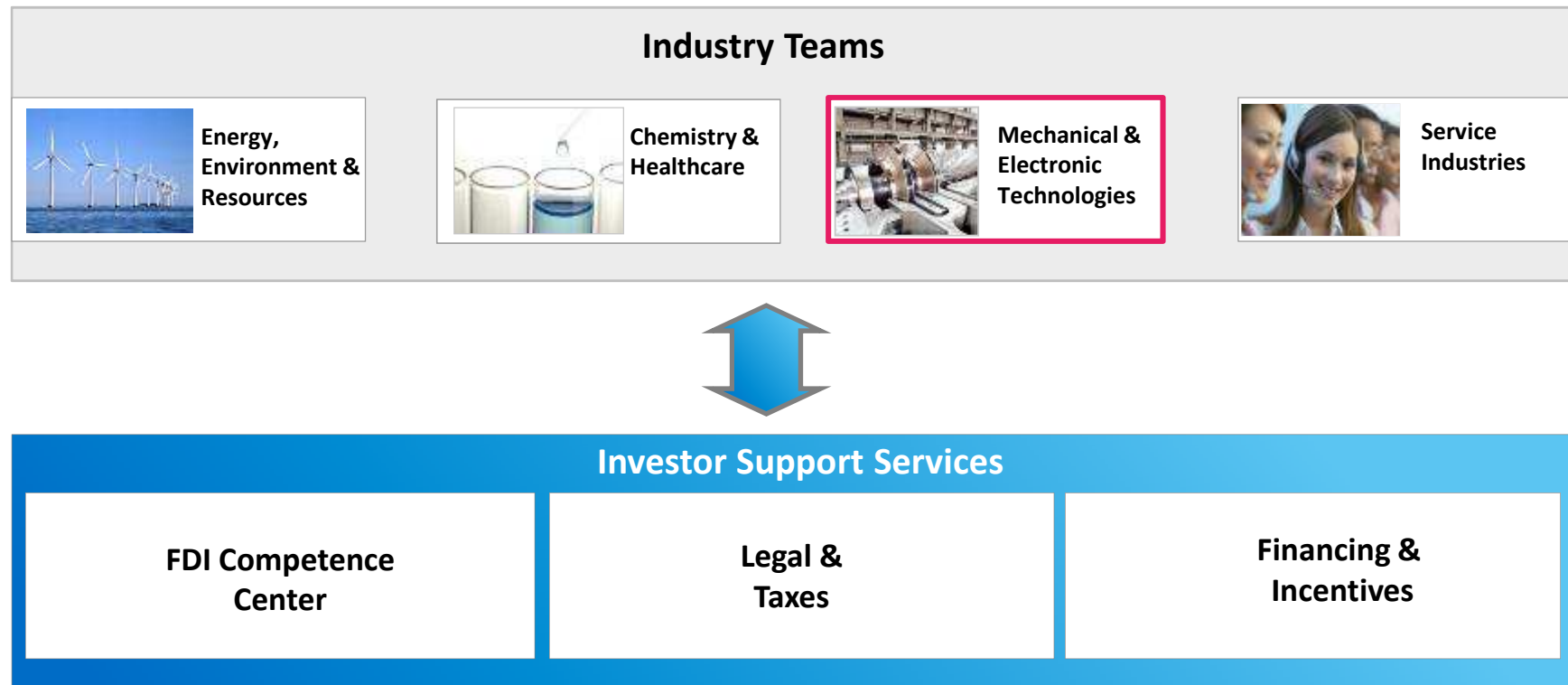
Business location consultancy services for international investors



Export market information for the German economy

Investor Consulting at GTAI

Specialized industries teams are supported by experts from the internal investors support services team.



Picture Credits: © BWE/Christian Hinsch; BMVBS/Amin Akhtar; Copyright Dreadlock/Fotolia; BSW/Paul Langrock

Mechanical and Electronic Technologies Team

Mega trends and technological developments determine the emphases for GTAI's investors support.



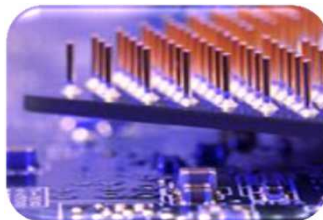
Transportation Technologies

- Automotive Industry
- E-Mobility & Autonomous Drive
- Aerospace & Rail Industry



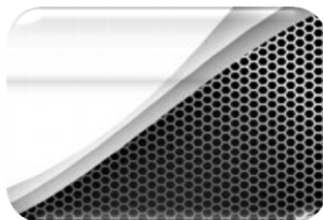
Machinery and Equipment

- Mechanical Engineering
- Automation & Production Technology
- Industrie 4.0



Electronics & Microtechnology

- Electronics & Microtechnology
- Additive Manufacturing
- Photonics



Materials Processing

- Metal & Plastics
- Lightweight Materials
- Nanotechnology

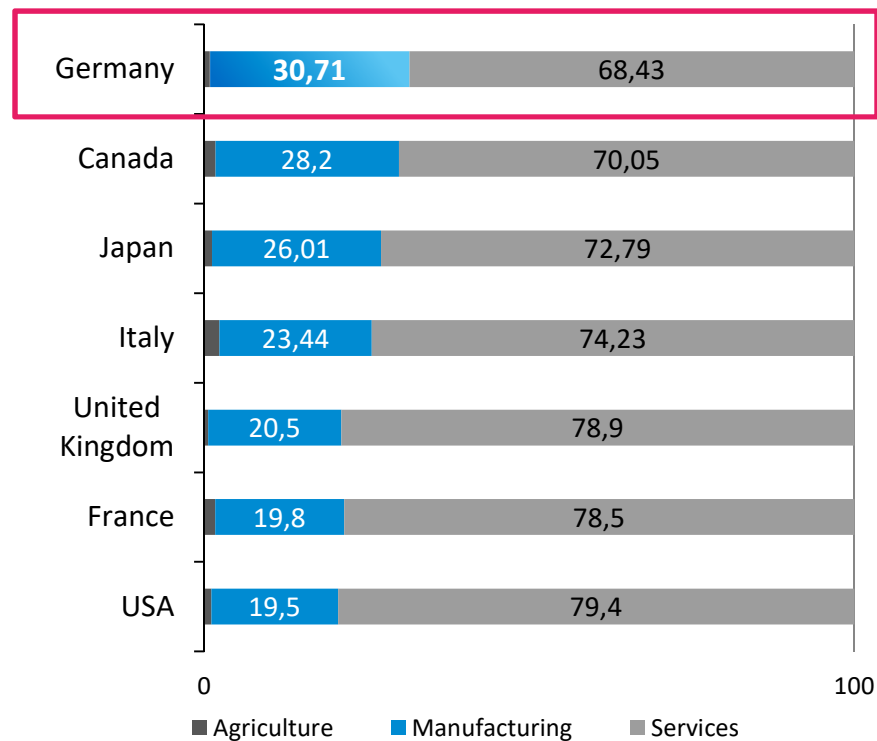


2. THE MACHINERY & EQUIPMENT INDUSTRY IN GERMANY

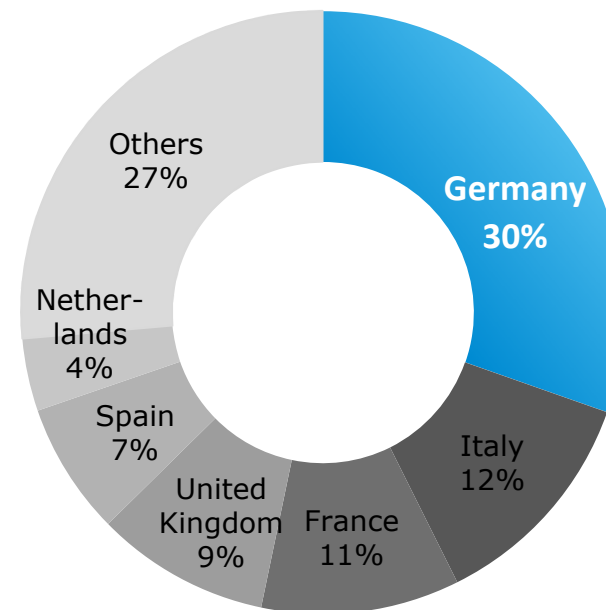
Manufacturing in Germany

Germany's share of GDP from industrial production is the highest of G7, making it Europe's largest manufacturer.

GDP of G7-Countries by Sector
(in %)



Gross Value Added of EU Manufacturing
(by country)



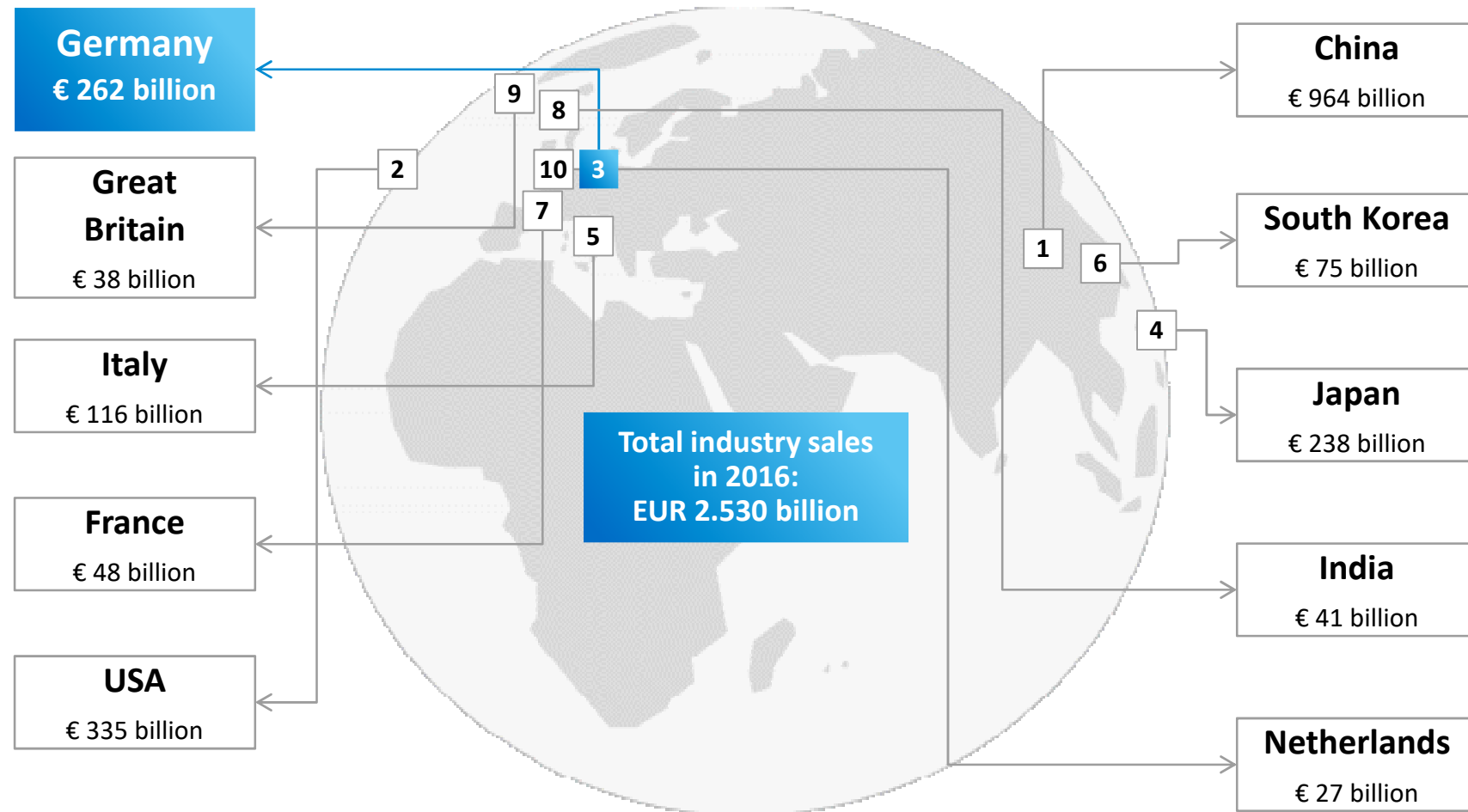
Source: World Bank, Eurostat 2014

© Germany Trade & Invest

www.gtai.com

The Global Machinery & Equipment Industry

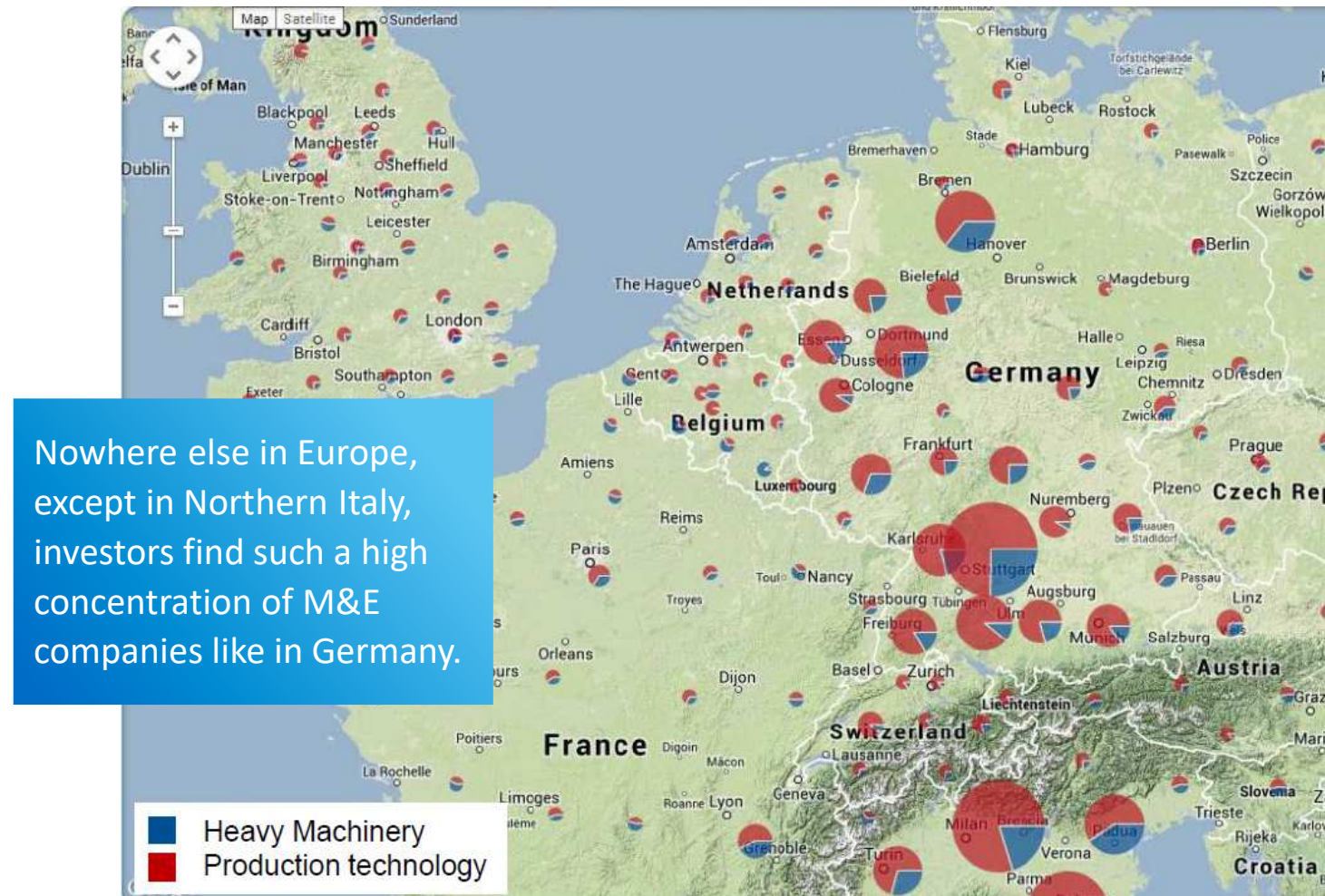
Worldwide Total Market Turnover – Top 10 Nations (2016)



Source: VDMA estimations based on National Statistics, Eurostat, CMIF and UNIDO 2017

Density of Machinery & Equipment Companies

Clusters of Europe's machinery industry*



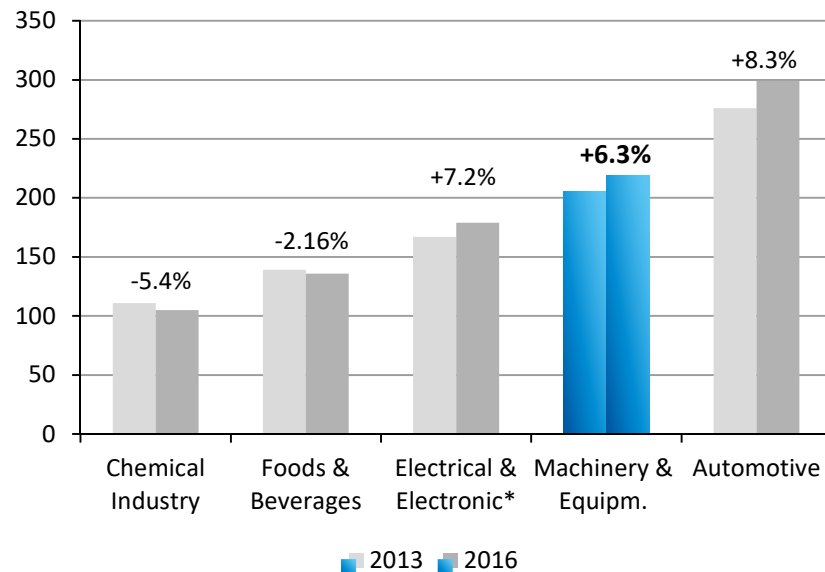
*Cluster according to the number of employees

Source: European Cluster Observatory 2017

The German Machinery & Equipment Industry

The Machinery and Equipment (M&E) Industry employs the most people of all manufacturing industries in Germany.

M&E Industry annual turnover
(2016, in EUR bn.)



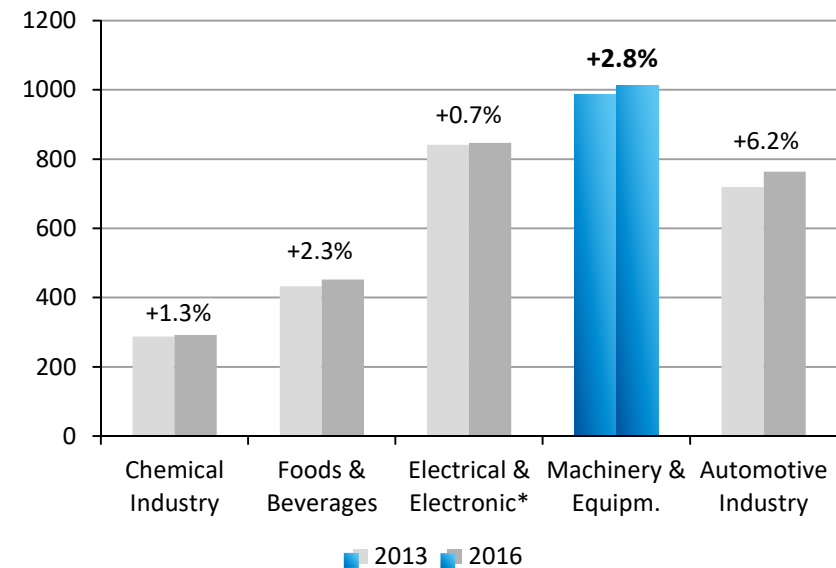
Total Turnover Manufacturing :
1.4 bn EUR

**without information technology*

Source: Statistisches Bundesamt, VDMA 2017

© Germany Trade & Invest

M&E Industry employees
(yearly average in 1,000)

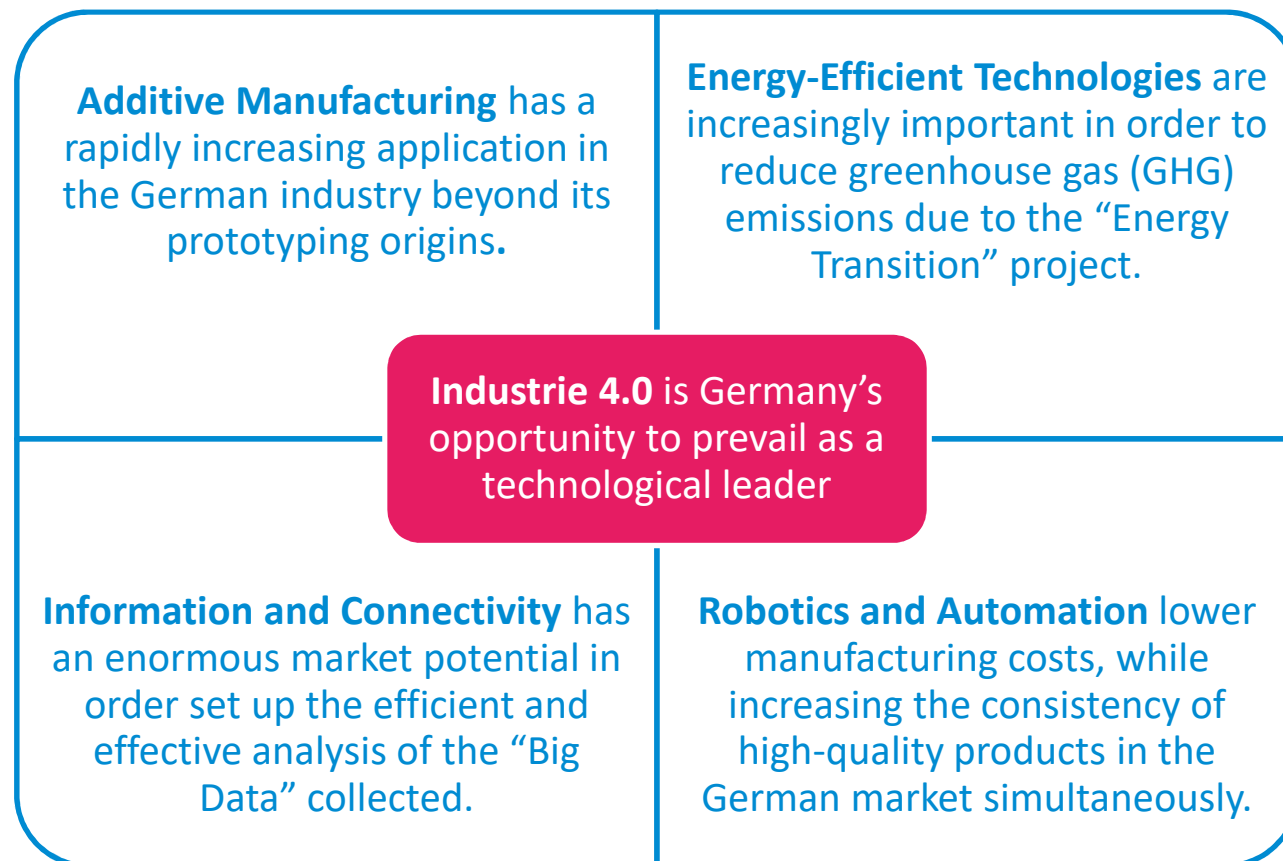


Total Employees Manufacturing:
5 Mio.

Source: VDMA 2017

Market Opportunities within the M&E Industry

Five major technological trends indicate attractive investment opportunities.

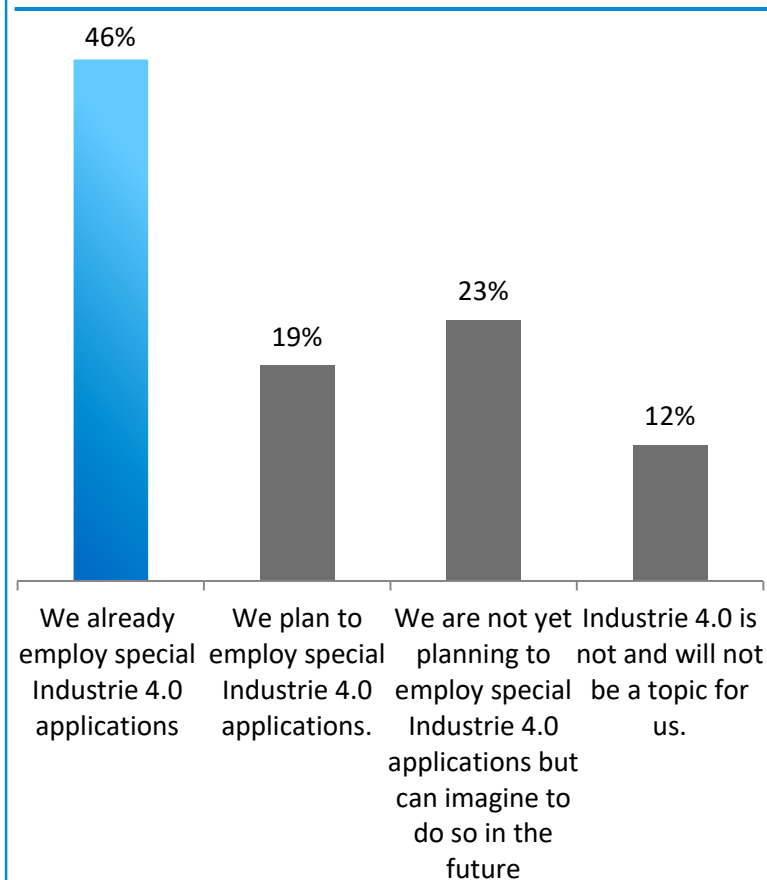


Source: Germany Trade and Invest Research 2017

Implementation in Germany

The extensive implementation of Industrie 4.0 proceeds apace and will require further investments.

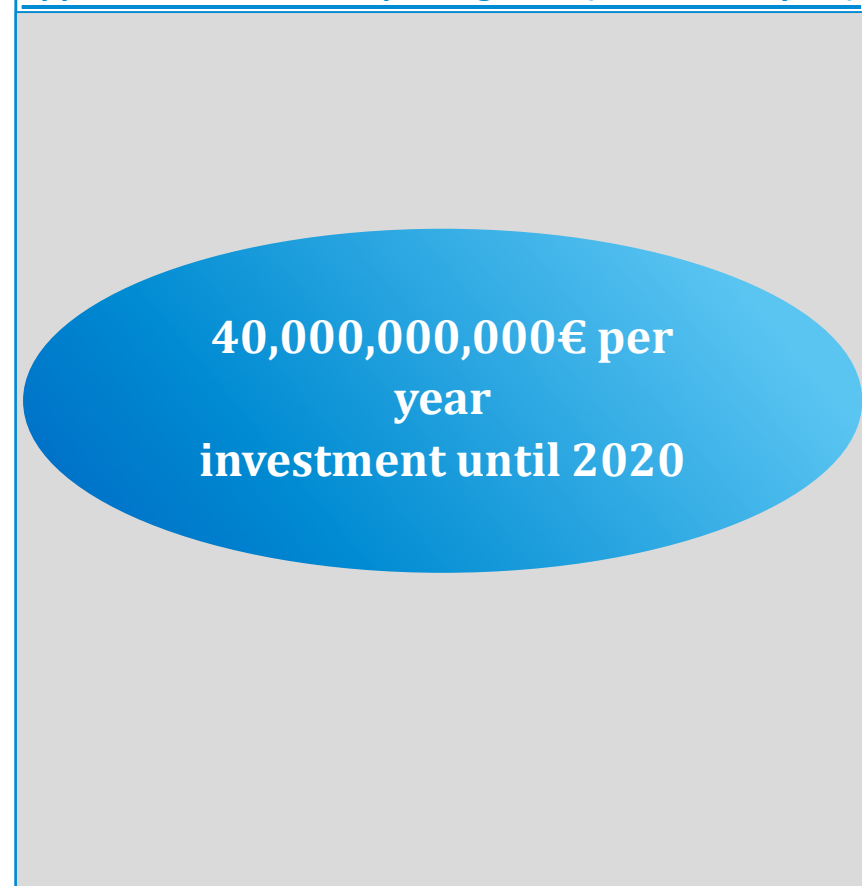
**Industrie 4.0 relevance in German companies
(with > 100 employees)**



Source: Bitkom Research 2016

© Germany Trade & Invest

**Annual investment volume in Industrie 4.0
applications until 2020 per segment (in EUR bn / year)**



Source: PwC 2014

Industrie 4.0 applied

Intelligent production has long been transferred from research to practical application.

ADIDAS Group – SPEEDFACTORY in Ansbach, Bavaria



„Made in Germany“

- 18 months „time-to-market“
 - Relocation of production to Germany:
Set up of a “Speedfactory”
 - Fully automated 4.600m² footwear production by using robot technology
 - Large-scale production to begin in 2017
- ✓ Around 2 months „time-to-market“
 - ✓ Human being & machine work side by side
 - ✓ 3D-printed soles
 - ✓ In-store customization and digital consumer experience
 - ✓ Cutting down on shipping emissions

Source: www.adidas-group.com; Roland Berger 2016; The Economist 2017

Picture: Adidas Group 2017

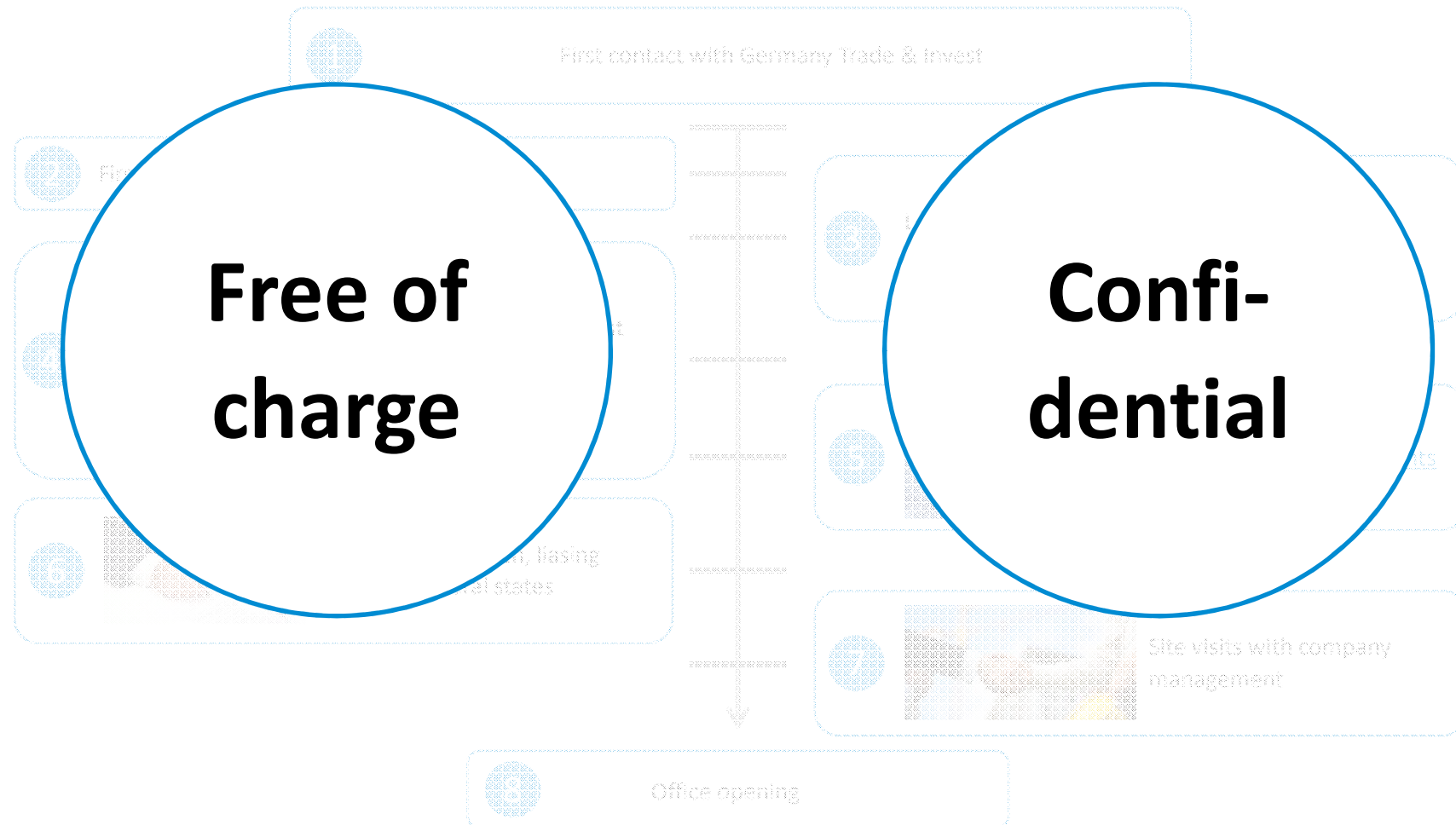
© Germany Trade & Invest



3. HOW GTAI CAN HELP YOU

How GTAI Can Help You

Typical project case – GTAI delivers valuable services



Contact us



Berlin

Ms. Claudia Grüne

Manager

Machinery & Equipment

Friedrichstrasse 60

10117 Berlin

Germany

Tel. +49 30 200 099 430

Mob. +49 151 171 500 46

Claudia.Gruene@gtai.com







© 2017 Germany Trade & Invest

All information provided by Germany Trade & Invest has been put together with the utmost care. However we assume no liability for the accuracy of the information provided.

Grants for Investments/Personnel

Germany offers grants (“Joint Task program”) of up to 40% to support new production or service facilities.

Timeframe 01.07.2014- 31.12.2020	Small enterprises	Medium- sized enterprises	Large enterprises
 Predefined C Region¹	max. 35%	max. 25%	max. 15%
 Border area to Poland	max. 40%	max. 30%	max. 20%
 Non-predefined C Region	max. 30%	max. 20%	max. 10%
 D Region	max. 20%	max. 10%	max. EUR 200,000

Funding for:				
Investments	Working Capital	Research & Development	Specific Purposes	Personnel
Public funding instruments:				
Grants	Loans	Guarantees	Equity Capital	Mezzanine Capital

Note: ¹ until 31.12.2017, aid intensity 2018-2020 five percentage points lower as in „Non-predefined C regions“

