



Landeshauptstadt
Düsseldorf

Business Location Düsseldorf: Facts & Figures

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European Catchment Area

Düsseldorf – At the heart of the European market

- 155 million people live within a radius of 500 km.
- 31 % of the EU's total population (i.e. 50 % of total EU purchasing power) live less than 500 km from Düsseldorf.
- Important European economic capitals are just one hour's flight from Düsseldorf:
Amsterdam, Brussels, London, Luxemburg, Paris, Zürich
- Düsseldorf is at the heart of the Rhein-Ruhr area with 11.5 million people and 500,000 companies within one hour's drive by car



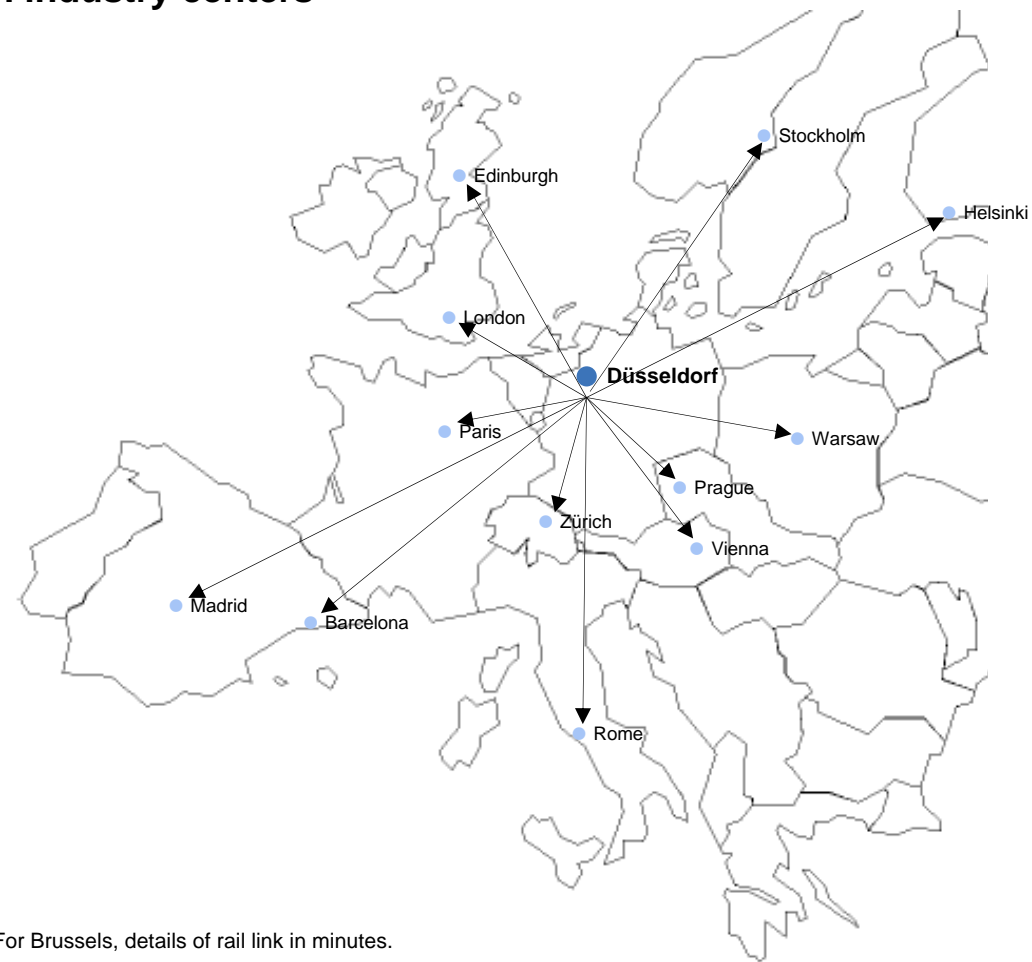
500-km radius with 155 million inhabitants



Reachability

Düsseldorf – Fast connections to European industry centers

Cities	Shortest road link in km	Flight time in minutes
Amsterdam	229	60
Barcelona	1391	130
Berlin	558	60
Brussels	203	154*
Edinburgh	1205	90
Frankfurt	227	55
Helsinki	1845	145
London	568	90
Luxemburg	212	45
Lyon	752	90
Madrid	1771	150
Milan	863	95
Oslo	1323	105
Paris	505	75
Prague	734	80
Rome	1439	130
Stockholm	1373	120
Warsaw	1111	110
Vienna	937	100
Zürich	602	80



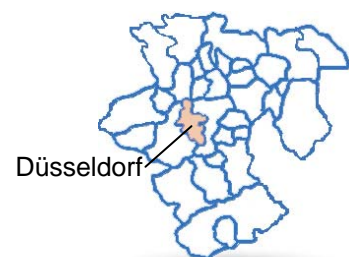
Source: Falk Routenplaner, Düsseldorf Airport, Deutsche Bahn AG V2011. * = For Brussels, details of rail link in minutes.



International Agglomerations

Business market Düsseldorf – In the same league as New York, London or Paris

Rhein-Ruhr Area



Area: 10,819 km²
Inhabitants: 11.5 million

60 km

Source: IKM, BBSR.

Metropolitan Area of New York



Area: 6,120 km²
Inhabitants: 14.0 million

70 km

Source: U.S. Census Bureau.
Area: Adjusted layout of metropolitan divisions.

Greater London



Area: 14,188 km²
Inhabitants: 13.6 million

90 km

Source: Greater London Authority.
The layout corresponds to Greater London plus the surrounding counties.

Paris - Ile de France



Area: 12,000 km²
Inhabitants: 11.7 million

70 km

Source: INSEE, France



Düsseldorf – Germany's Most Powerful Economic Center

Düsseldorf/Rhein-Ruhr Area

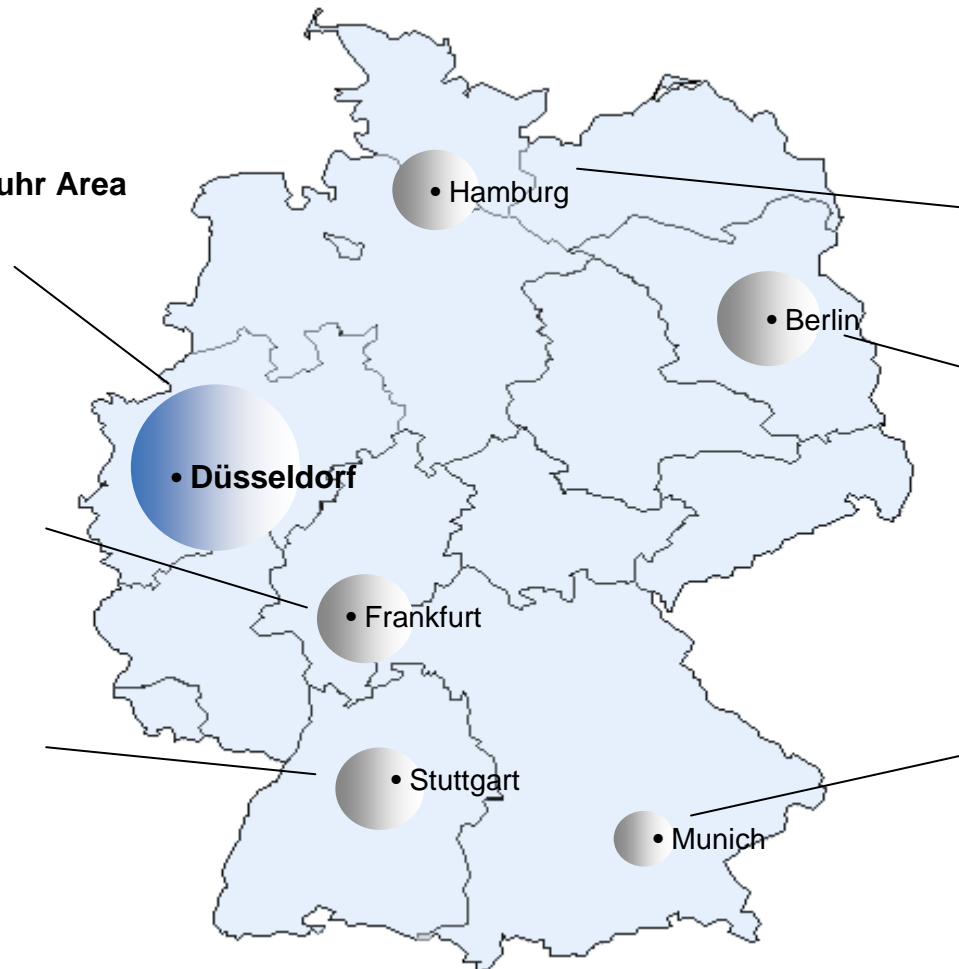
- Inhabitants: 11.5 m
- Employees: 5.3 m
- GDP in €: 293.8 bn

Frankfurt Area

- Inhabitants: 5.3 m
- Employees: 2.6 m
- GDP in €: 159.8 bn

Stuttgart Area

- Inhabitants: 4.7 m
- Employees: 2.3 m
- GDP in €: 132.4 bn



Hamburg Area

- Inhabitants: 4.2 m
- Employees: 2.0 m
- GDP in €: 119.3 bn

Berlin Area

- Inhabitants: 6.0 m
- Employees: 2.5 m
- GDP in €: 112.6 bn

Munich Area

- Inhabitants: 2.5 m
- Employees: 1.5 m
- GDP in €: 104.5 bn

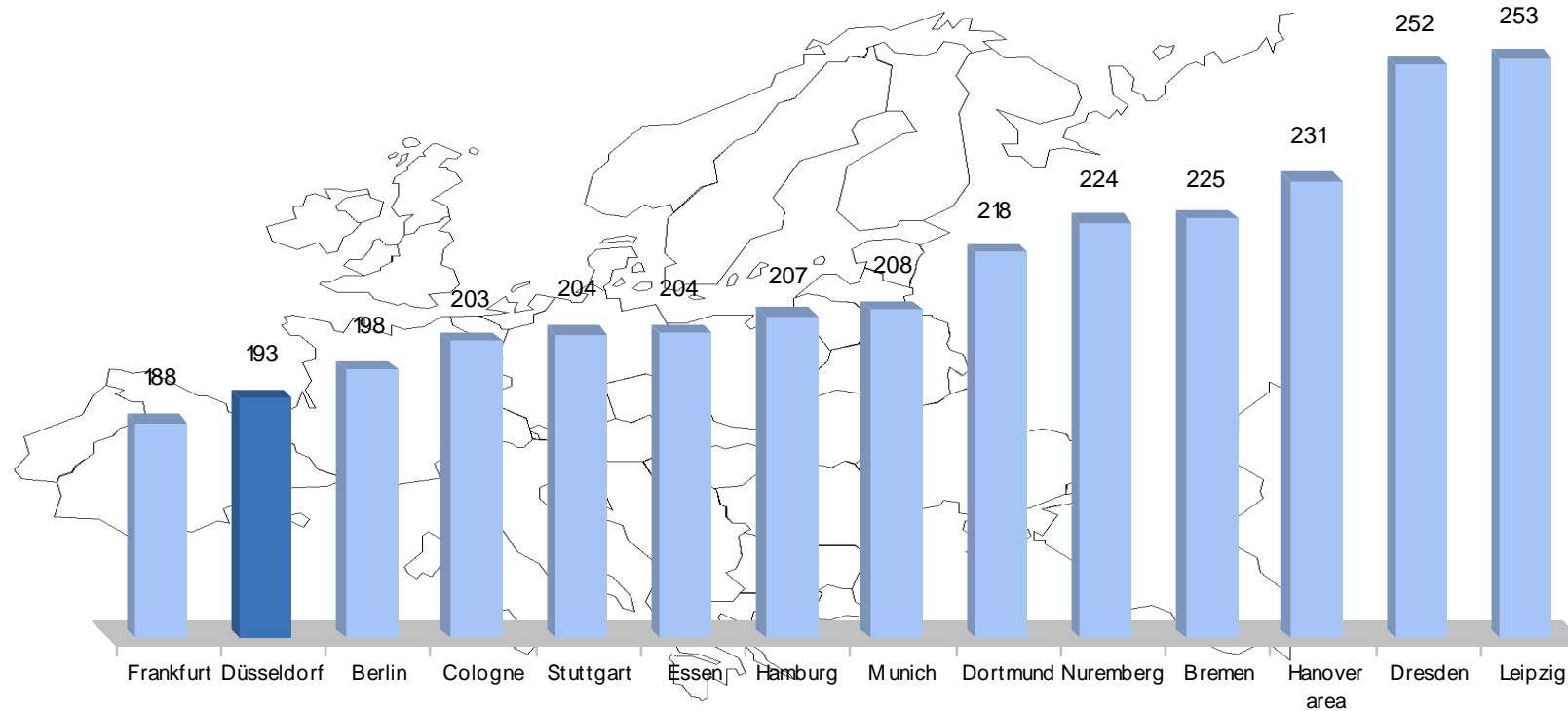
Source: IKM, BBSR.



Europe-Wide Accessibility

Cost-optimized European location

Average traveling time to 41 European cities in minutes



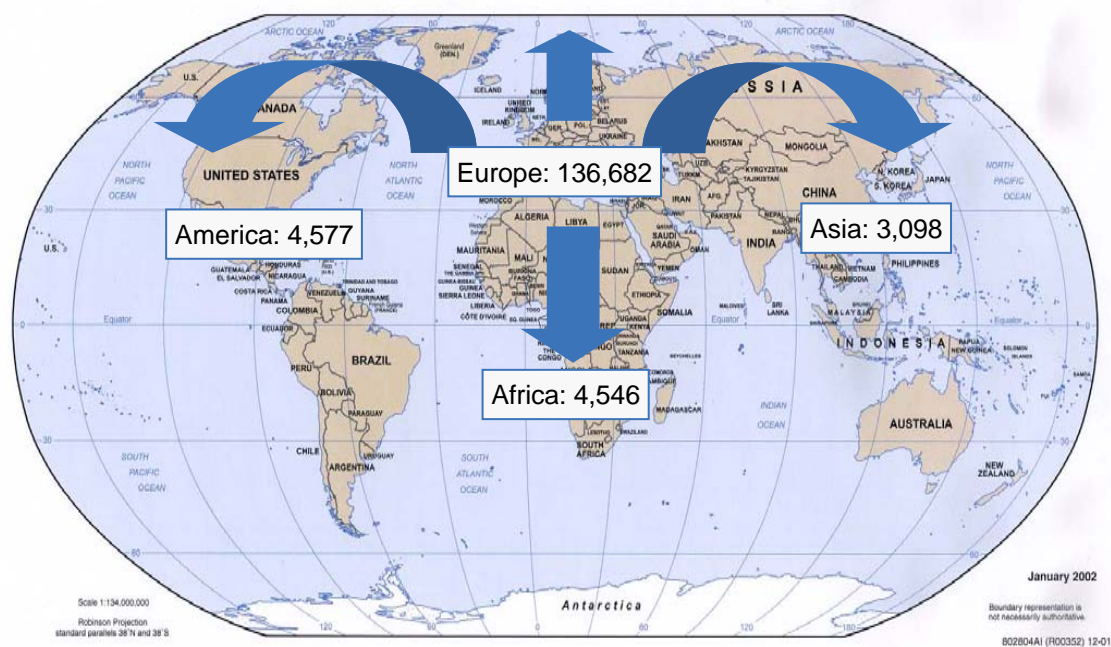
Source: BBR V2010. Average traveling time in combined car/air travel to 41 selected European agglomerations.



Worldwide Air Links

Düsseldorf International Airport – Globally connected

Annual flights from Düsseldorf Airport to international destination:



Source: Flughafen Düsseldorf GmbH V2010.



Düsseldorf International Airport

Airport key figures

- Third-largest airport in Germany
- 180 destinations worldwide
- 17.8 million passengers per year
- 214,024 flights per year
- 65,286 metric tons of air freight per year
- Fast connection to the city: 13 minutes by commuter train (S-Bahn)

Examples of non-stop destinations worldwide

- Atlanta
- Bangkok
- Chicago
- Detroit
- Dubai
- Los Angeles
- Moscow
- New York
- Beijing
- St. Petersburg
- Teheran
- Toronto
- Vancouver



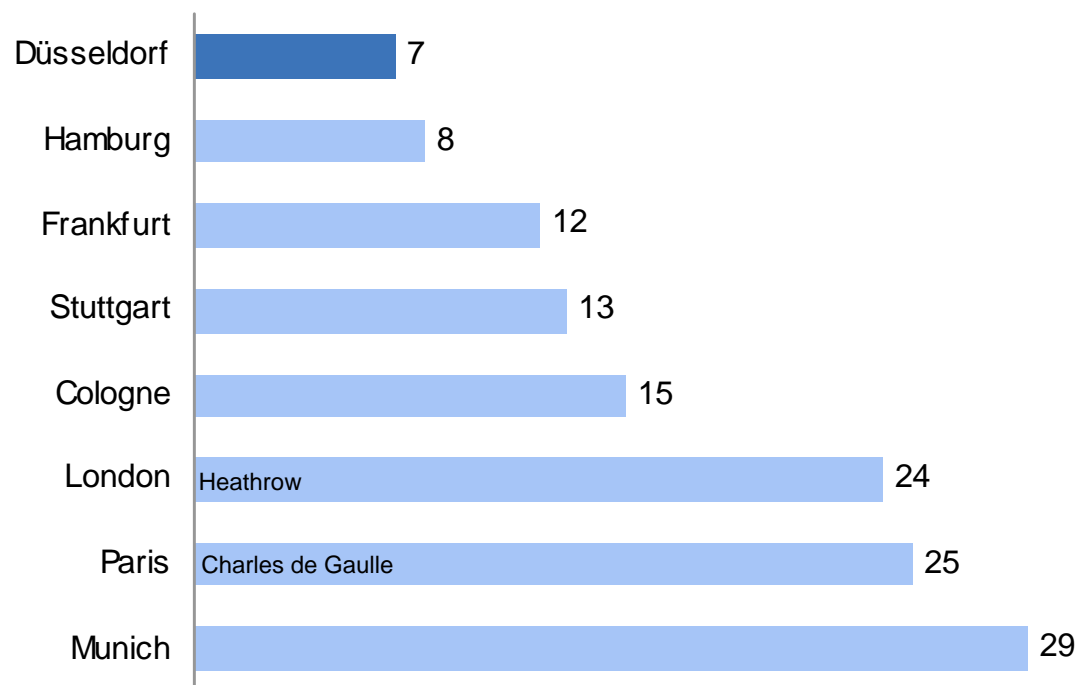
Source: Flughafen Düsseldorf GmbH V2010.



City - Airport

Excellent links between the city and Düsseldorf Airport

Distance from the airport to the city in km



Source: Bellevue V2009. For London and Paris: bonvoyage-online.de V2010.



Transport

Comprehensive transport infrastructure

- Railway**
- Over 900 train departures per day
 - 150 long-distance trains per day
 - Over 300 trains stop at the airport
 - Rheinbahn AG rated “AA”
- Highway**
- 13 urban highway junctions
 - 50 urban highway kilometers
 - 13 Park & Ride car parks
- Harbor**
- Rhine Harbor
 - Total area: 5 km²
 - 16.4 million metric tons of freight handled
 - 28 crane installations
 - 17 harbor trains



Sources: Deutsche Bahn AG, Düsseldorf Statistical Office, Neuss-Düsseldorfer Häfen GmbH. Both V2010.



Landeshauptstadt
Düsseldorf

Trade Fair Location Düsseldorf

The world's economy gets together at Düsseldorf's fairs

- Almost 50 international specialist fairs
- 23 of them are the No. 1 worldwide
- Capacity incl. 19 halls: 307,000 m²
- Best annual turnover: 496 m euros
- Up to 32,500 exhibitors per year
- Up to 2.7 million visitors per year
- Share of foreign exhibitors: 56 %
- Represented internationally in 13 countries at over 80 trade fairs

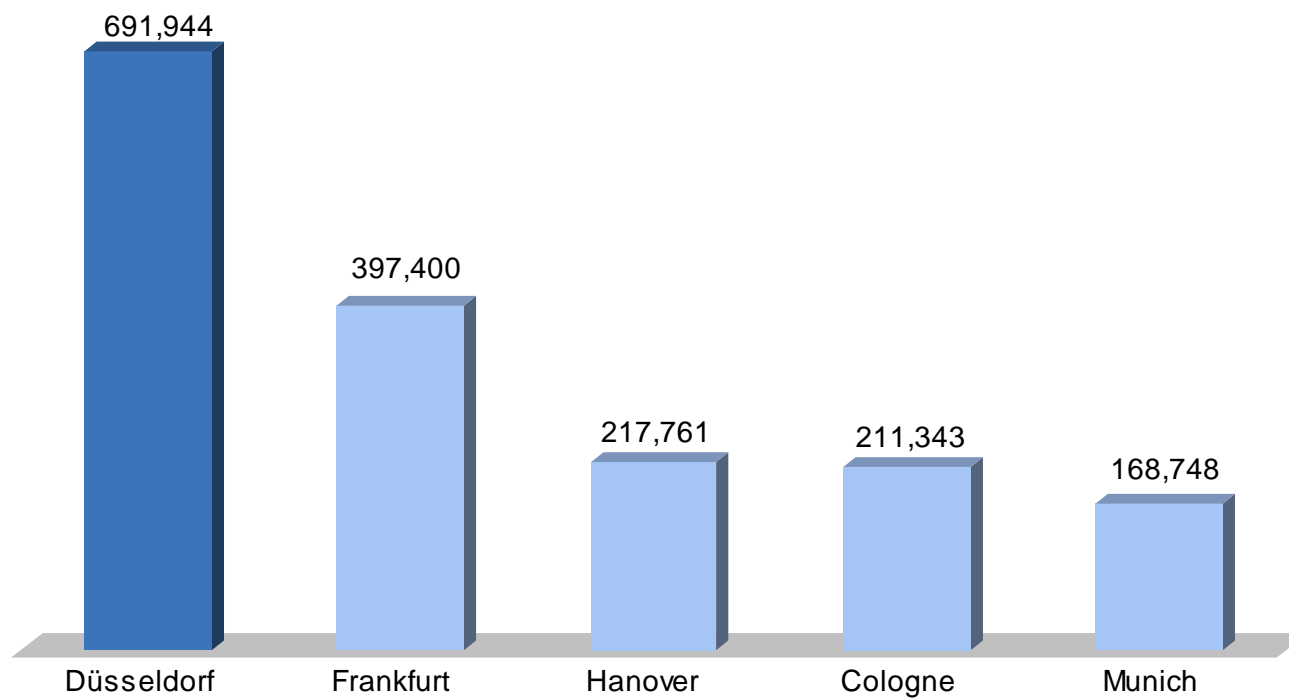


Sources: Messe Düsseldorf V2010.



International Trade Fair Visitors

Düsseldorf – Highest proportion of trade fair visitors from abroad



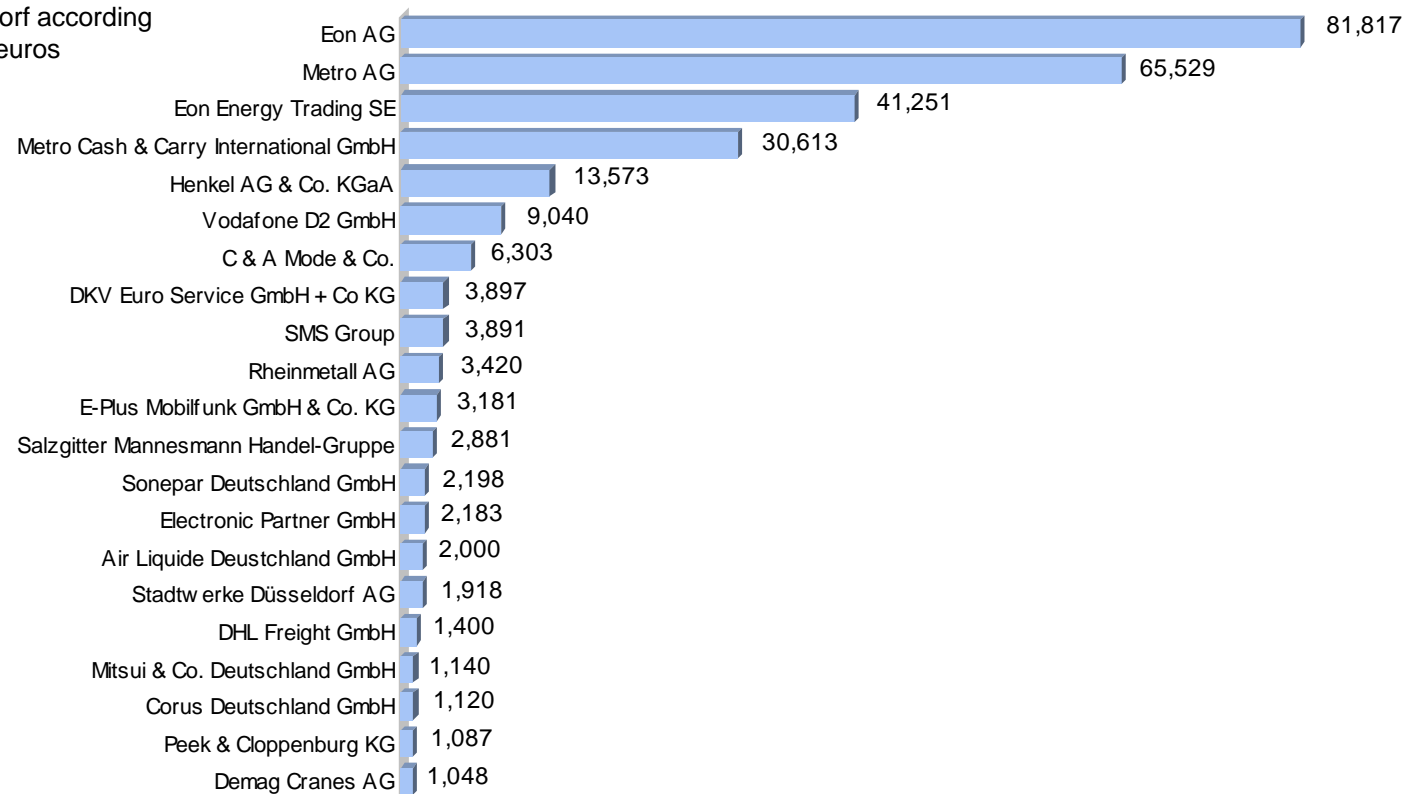
Source: AUMA V2010H1. B2008.



Global corporate groups

Global corporate groups in Düsseldorf

The largest concerns in Düsseldorf according to annual turnover in millions of euros



Source: Die Welt V2010.



Foreign Corporate Groups

International global corporate groups in Düsseldorf

Examples of foreign companies with headquarters in Düsseldorf

- BBDO
- Deloitte & Touche
- Ericsson
- Fujifilm Europe
- Grey
- Huawei
- LVMH Parfums
- McKinsey
- Mitsui
- Nokia Siemens
- Novell
- QVC
- Renesas
- TATA
- The Bank of Tokyo-Mitsubishi
- Toshiba
- Vodafone Group
- ZTE

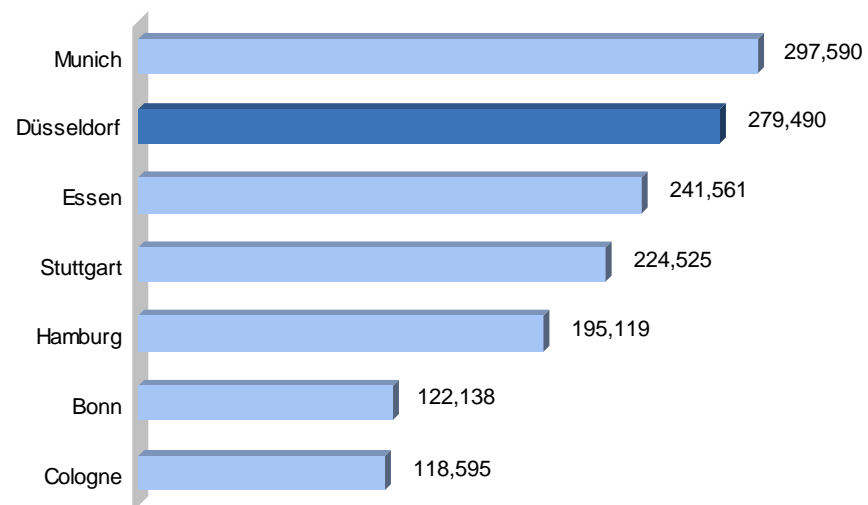
Source: Monitoring by the Düsseldorf Office of Economic Development V2010 H1.



Company Size

Düsseldorf among the top German corporate groups locations

Annual turnover of the largest concerns in the relevant cities in millions of euros



German global companies in Düsseldorf

- E.on (Energy)
- Metro (Retail)
- Henkel (Cleaning agents and toiletries)
- Vodafone D2 (Telecommunications)
- C & A (Clothing)
- Rheinmetall (Metal products)
- E-Plus (Telecommunications)
- Demag Cranes (Crane installations)

Source: Die Welt V2010.



International Institutions in Düsseldorf

40 consulates and consular offices

including:

- USA
- Japan
- France
- Great Britain
- The Netherlands
- Czech Republic

33 foreign chambers of commerce and industry and foreign trade organizations

including:

- Great Britain
- France
- Japan
- China
- India
- Russia



International

International Schools

- International School of Düsseldorf with 1,000 students from 50 countries
- Japanese International School, Düsseldorf
- Lycée Français de Düsseldorf
- Russian Education Center
- Complete Greek school system
- Four German academic high schools offer bilingual instruction
- Several international kindergartens

International clubs

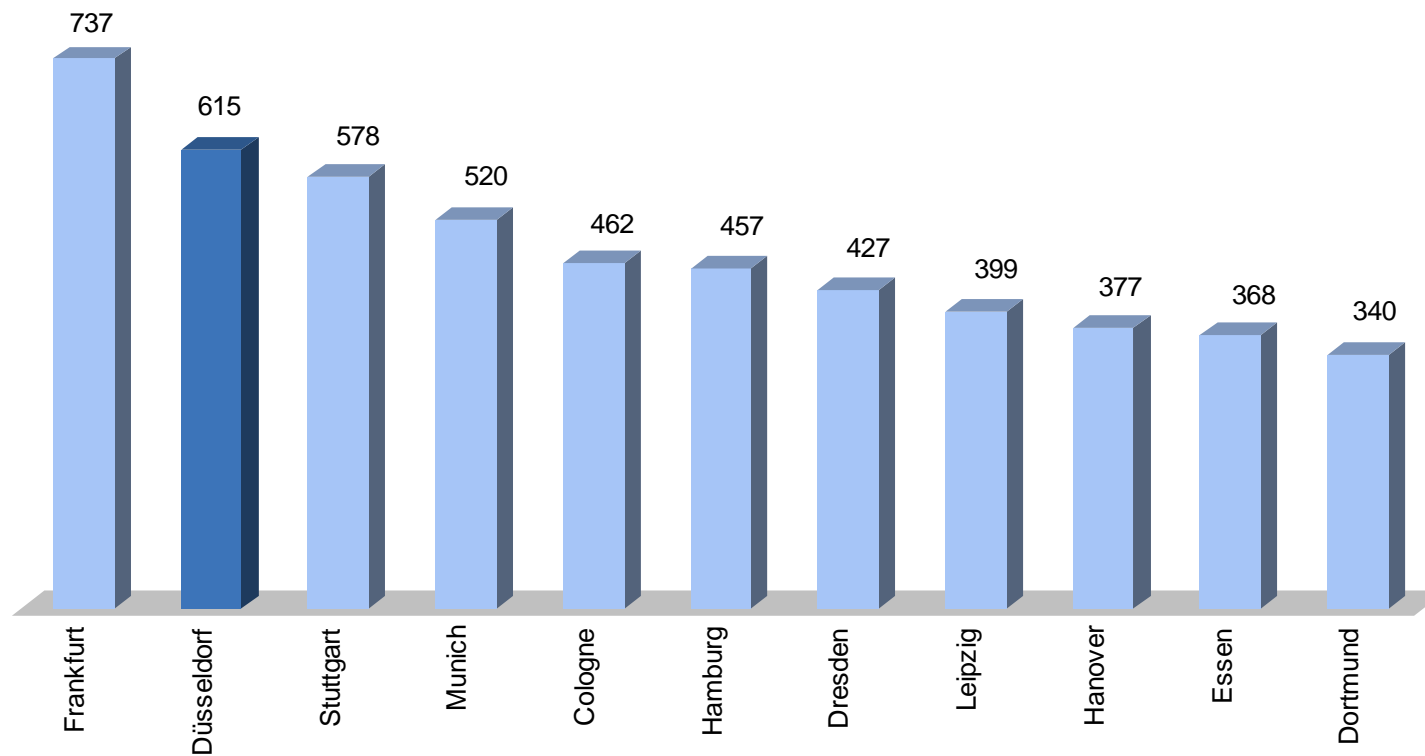
- Rotary Club
- Industry Club of Düsseldorf
- Japanese Club of Düsseldorf
- Lions Club
- Marketing Club
- Business Club Düsseldorf
- Düsseldorf China Club
- China Enterprises Association CEA
- German Czech Businessclub



Job Density

Very high job density in Düsseldorf

Employees in jobs subject to social security payments per 1,000 inhabitants

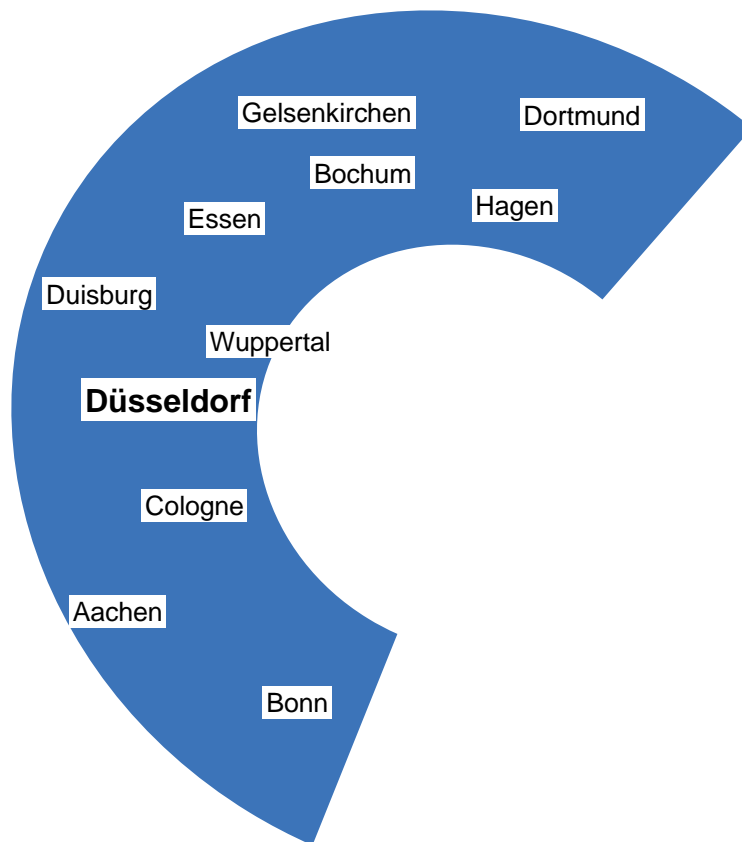


Sources: Employees in jobs subject to social security payments: Federal Employment Agency V2010; data as of 30.6.2009.
Population figures: Federal Statistical Office; data as of 01.01.2009.



Education/Research

Excellent research facilities in the metropolitan area of Düsseldorf



- 30 universities governed by public law and 26 private universities
- Over 500,000 students
- 12 Max Planck Institutes
- 6 International Max Planck Research Schools
- 11 Fraunhofer Institutes
- 3 research centers of the Helmholtz Association
- 10 institutes of the Leibniz Association
- German Research Foundation (DFG)
- The Association of German Engineers (VDI)
- North Rhine-Westphalian Academy for Sciences and Arts
- North Rhine-Westphalian Ministry for Innovation, Science and Research

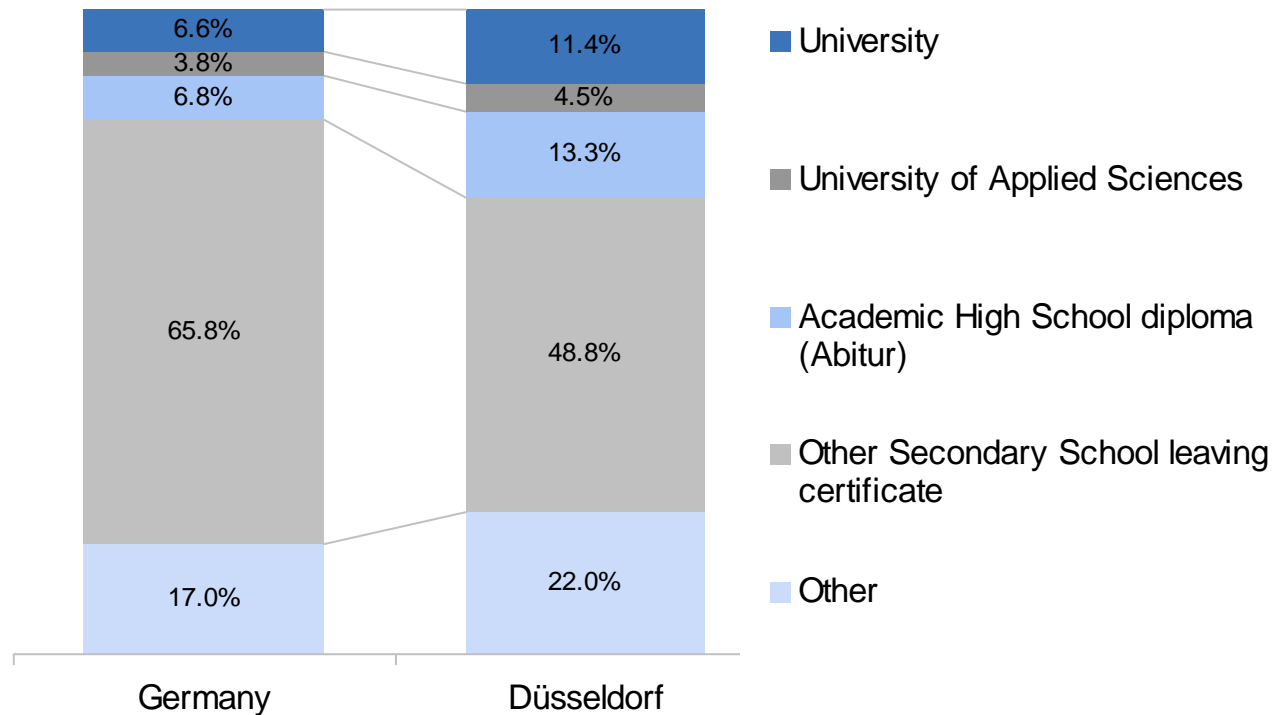
Source: North Rhine-Westphalian Ministry for Innovation, Science and Research V2011H1



Qualifications

Düsseldorf – Personnel with above-average qualifications

School-leaving qualifications of Düsseldorf employees in jobs subject to social security payments compared to the rest of Germany



Source: Federal Employment Agency V2010, B2009.



Innovations

Düsseldorf – Successful patent region

- No. 1 in the field of:
 - Organic chemistry
 - Dyes, mineral oil industry, oils, fats
- No. 2 in the field of:
 - Construction
 - Materials handling, lifting, saddlery
 - Grinding, pressing, tool-making
 - Cutting, mixing
 - Medical, dental and cosmetic preparations
 - Textiles or flexible materials



Source: German Patent and Trade Mark Office (DPMA). Basis: Regional development areas.



Quality of Living

Düsseldorf – A first-class place to live and work

Cities with the world's highest "quality of living"



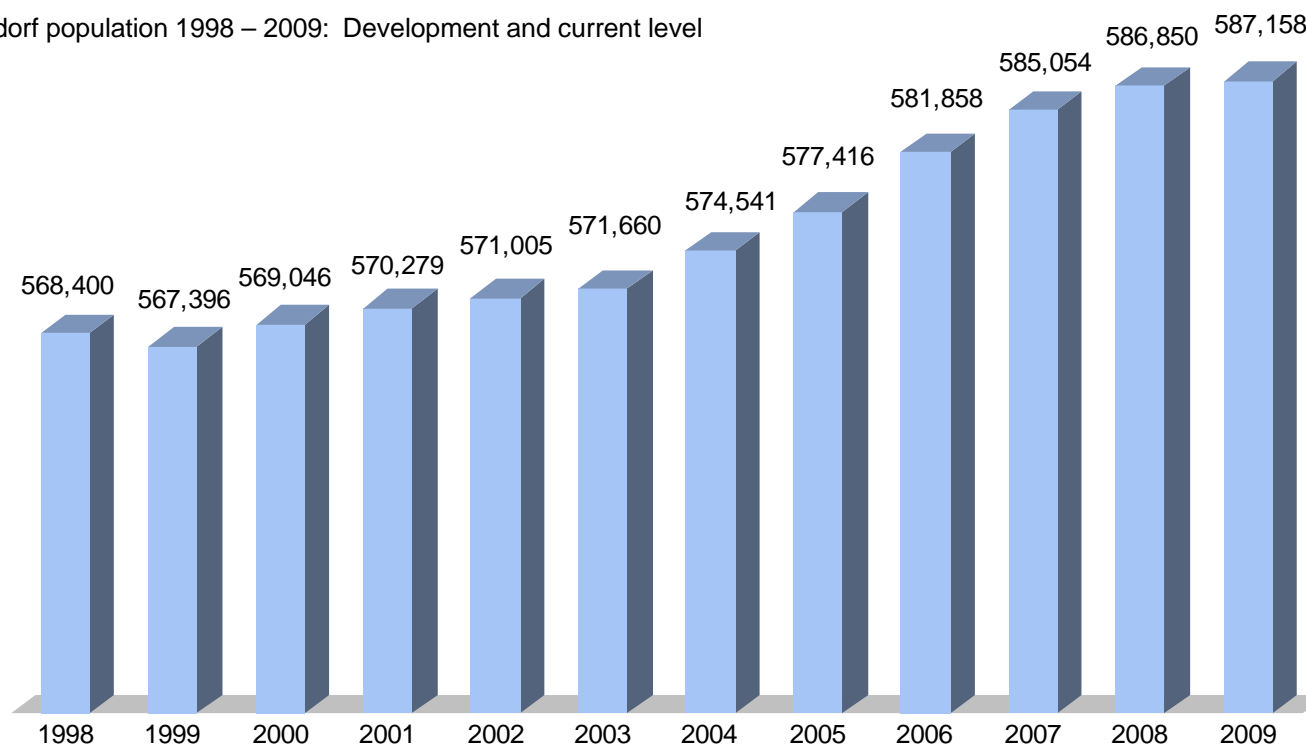
Source: Mercer "Quality of Living" survey V2010.



Population Growth

Continuing attraction for residents

Düsseldorf population 1998 – 2009: Development and current level

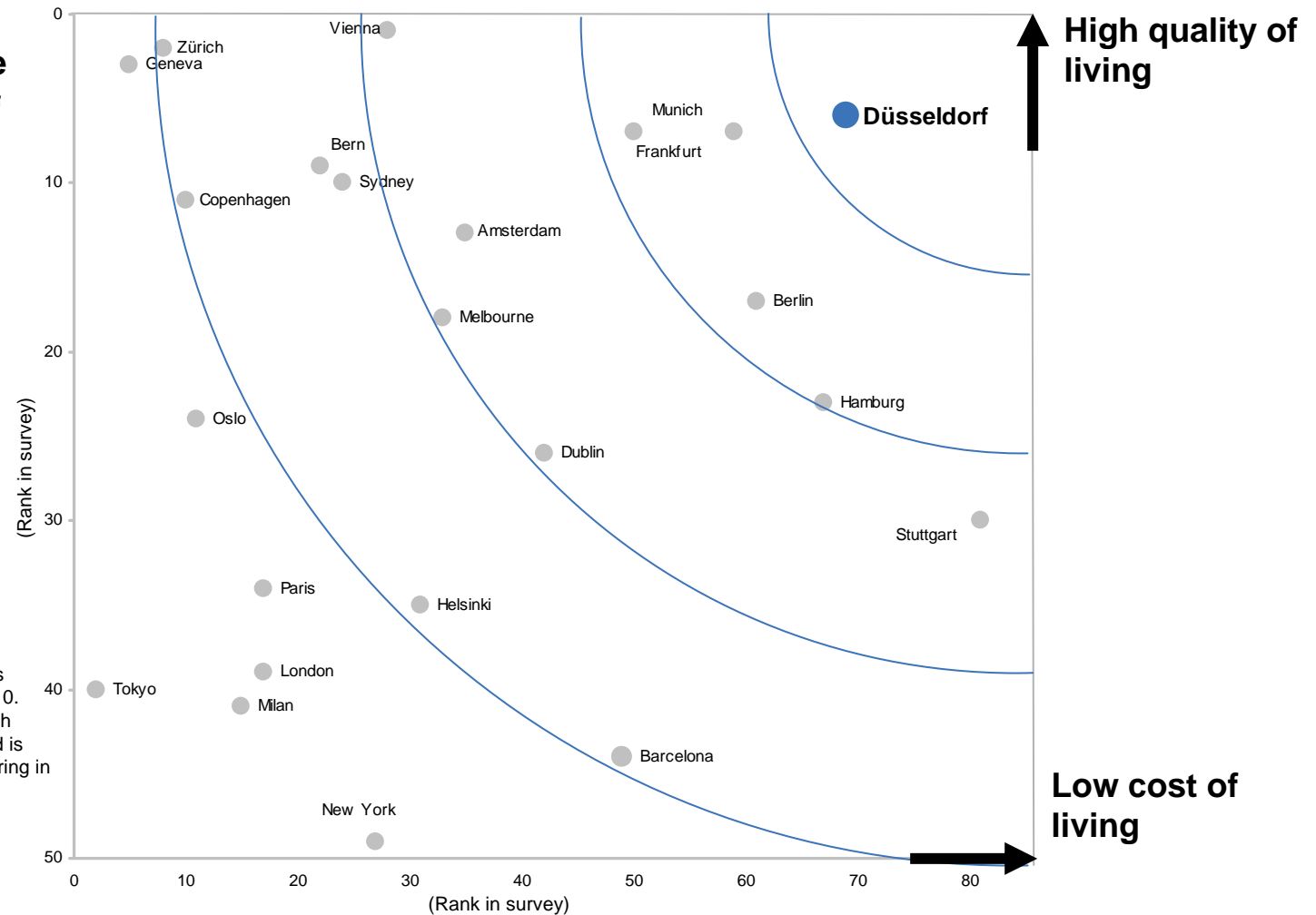


Source: Current population statistics from the Düsseldorf Statistical Office V2010. Figures taken for December 31st of each year.



Location Costs

Quality of living in Düsseldorf – worldwide comparison in terms of optimum cost-benefit ratio



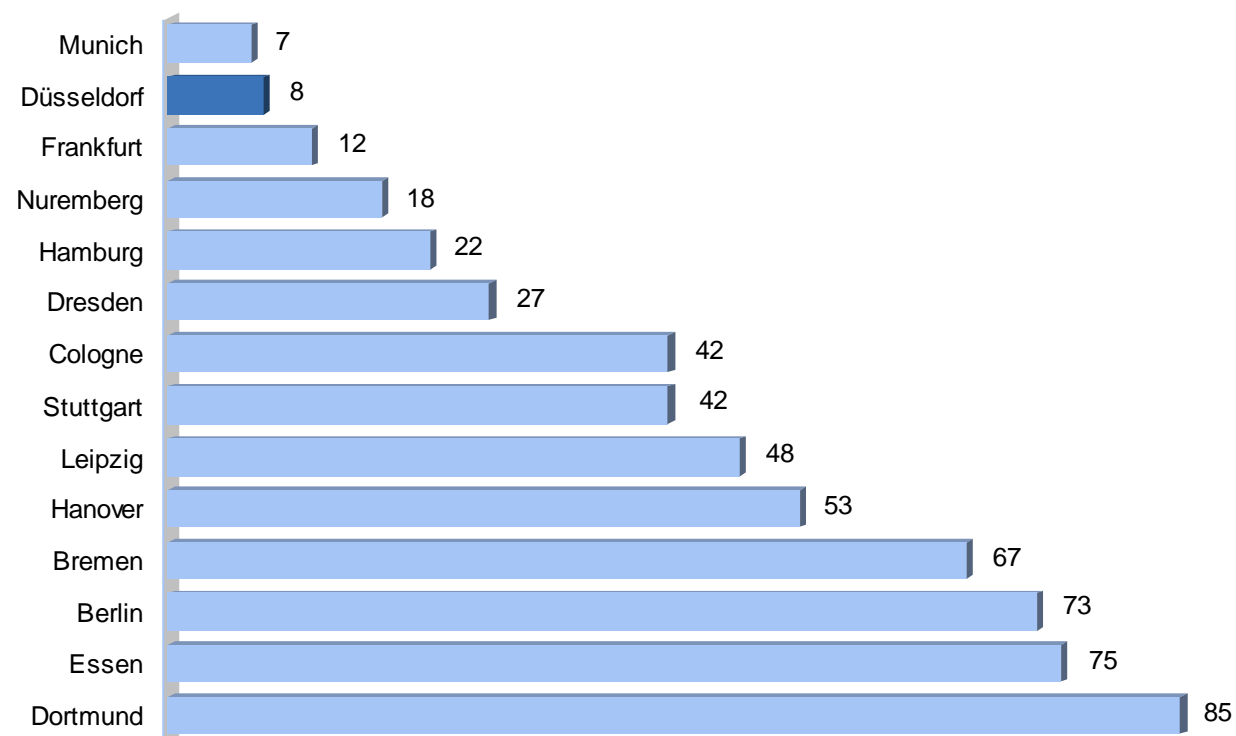
Source: Own comparison of Mercer surveys "Quality of Living" and "Cost of Living" V2010. The diagram includes only those cities which appeared in the Top 50 of both surveys and is complemented by the German cities appearing in the Top 100 of the "Cost of Living" survey.



Location Quality

Düsseldorf – High quality of location structure

Rankings in the INSM Cities Test in the category “Structure”



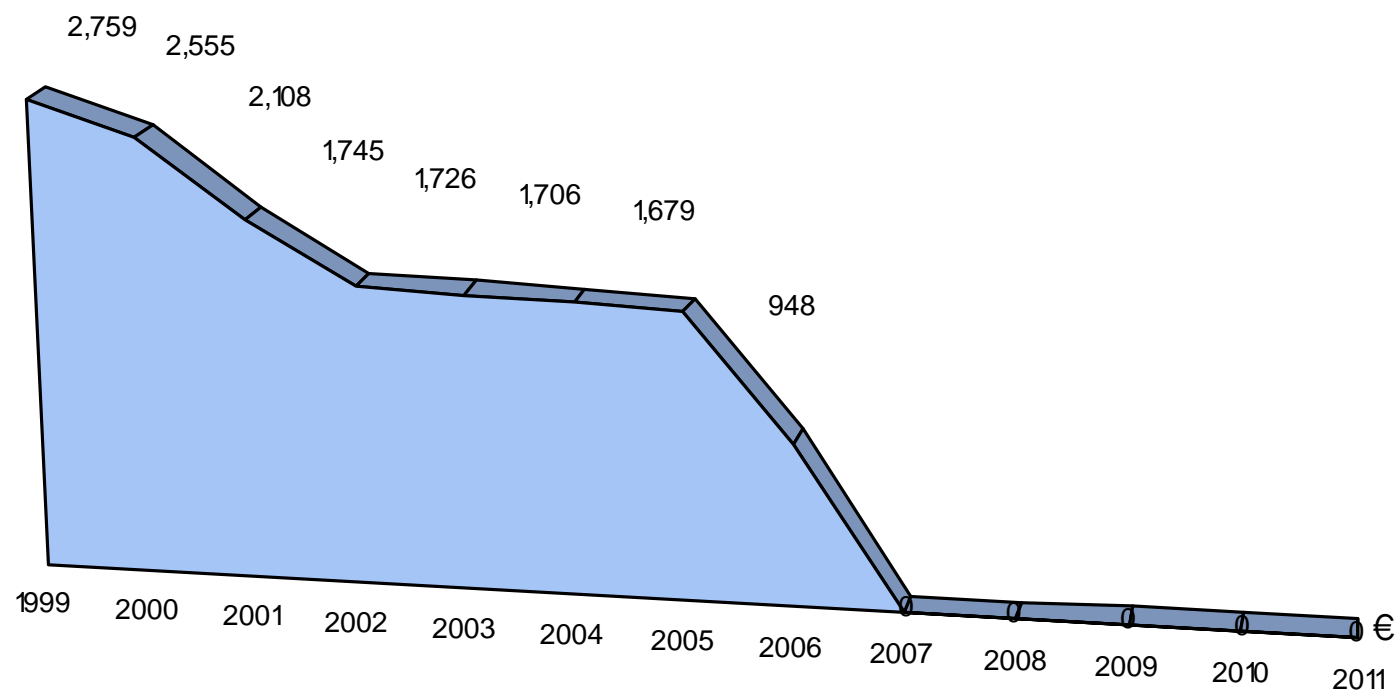
Source: INSM, IW Consult V2009. For the ranking shown in the chart, the categories “Level” and “Dynamism” were added together to give the category “Structure”. Only cities with populations over 500,000 are included in the chart.



Economic Strength

Responsible-minded budgetary policy

Development of per capita debt in Düsseldorf in euros



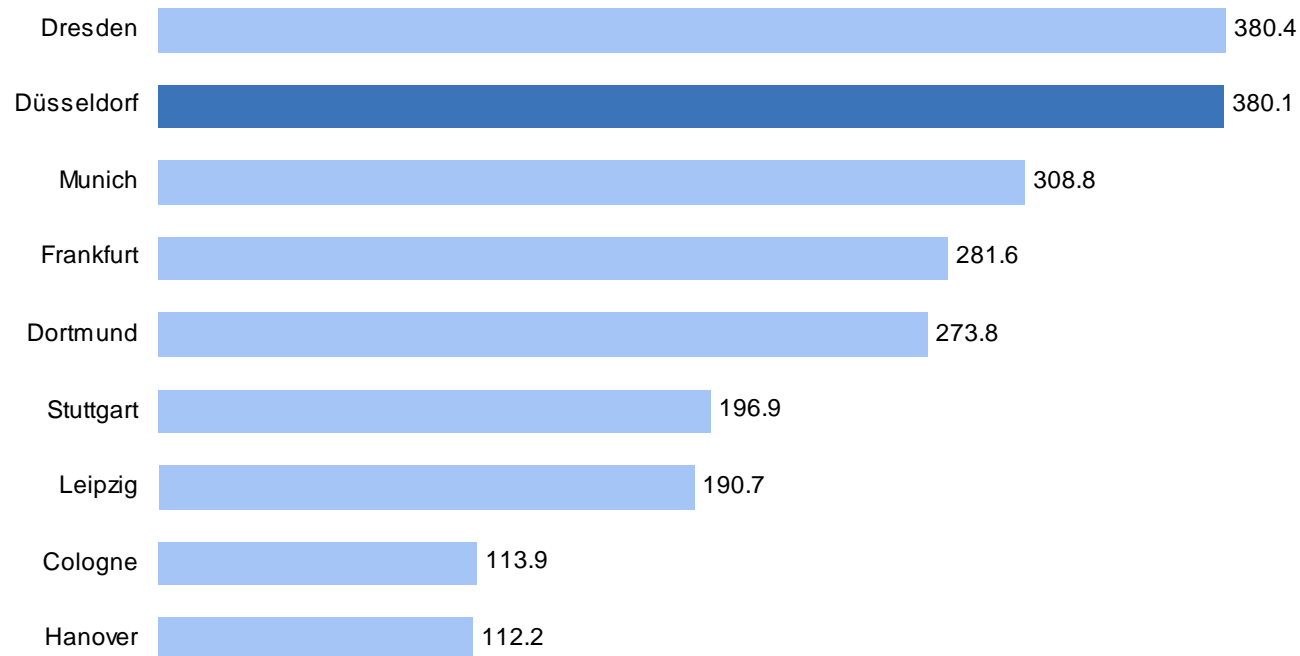
Source: City treasury of the City of Düsseldorf V2011H1. From 2007: Debt-free from the economic perspective of the comparison of third-party debt with the liquidity of the holding and the reserves of the city. 2010 in accordance with the effects of the planned budget.



Economic Strength

Düsseldorf – Strong on municipal investment

Municipal investments per capita and per annum in euros



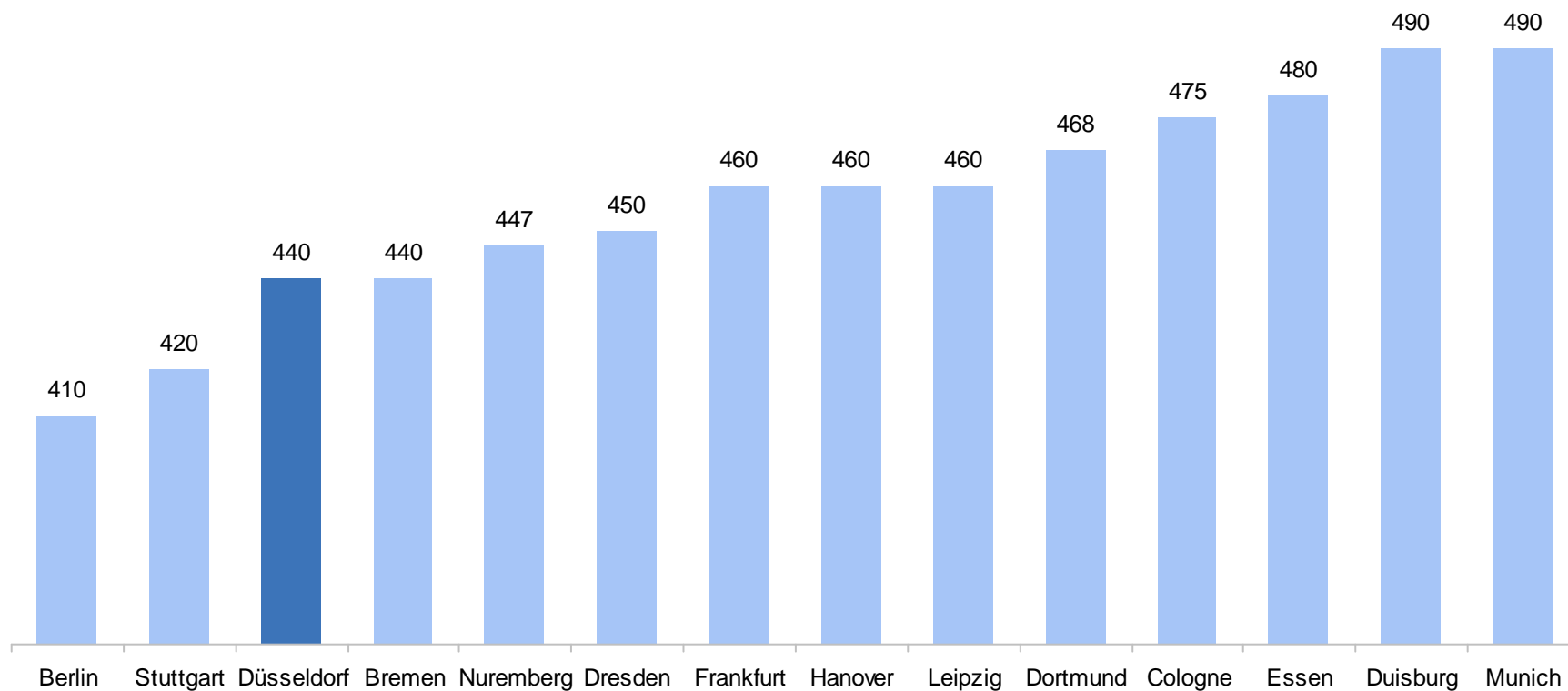
Source: State statistical offices V2010H2. B2009.



Location Costs

Favorable collection rate for trade tax in Düsseldorf in comparison with other cities

Trade tax collection rates in German cities



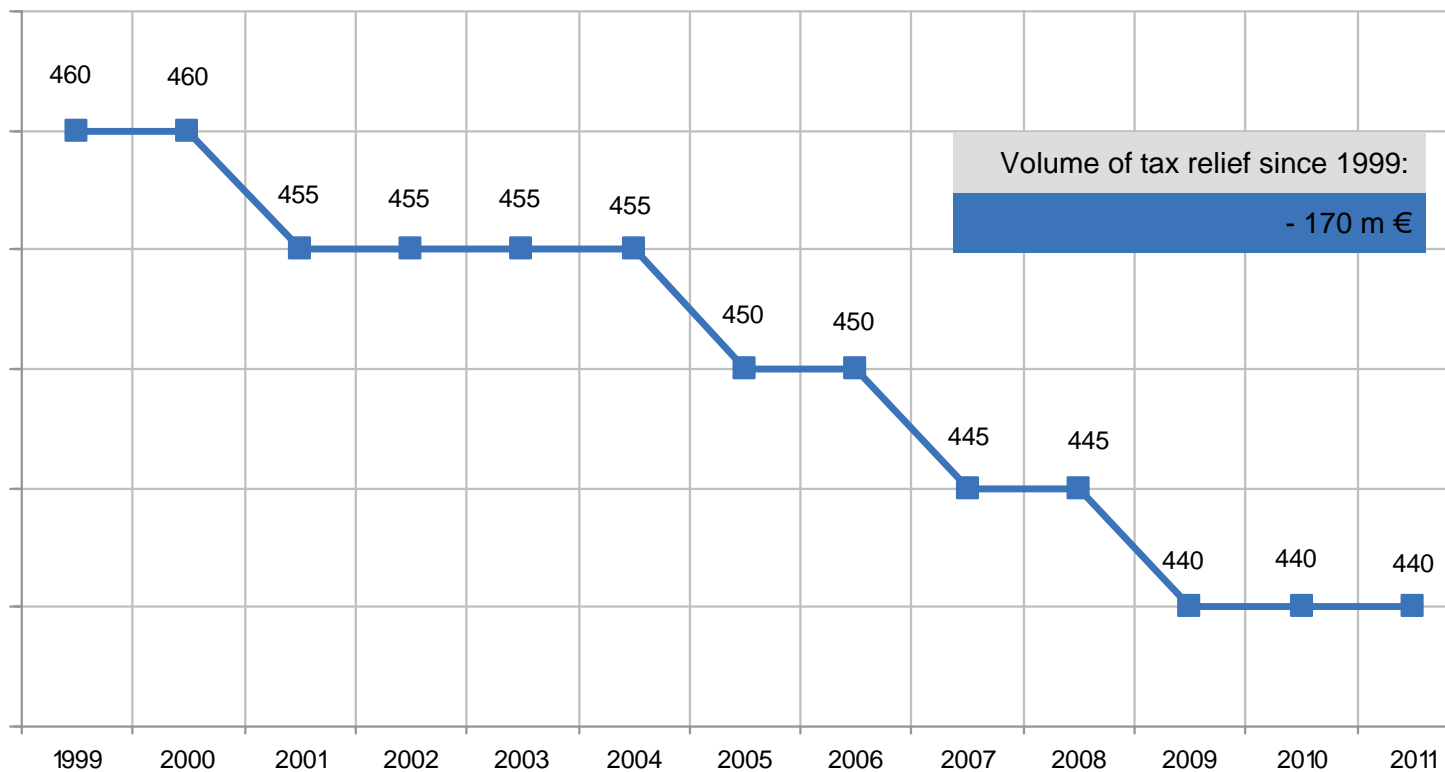
Source: City treasuries of the relevant cities V2011. Cities with populations over 500,000 are included, with the exception of Duisburg.



Location Costs

Repeated trade tax reductions provide relief for Düsseldorf companies

Development of collection rate for trade tax in Düsseldorf 1999 - 2011

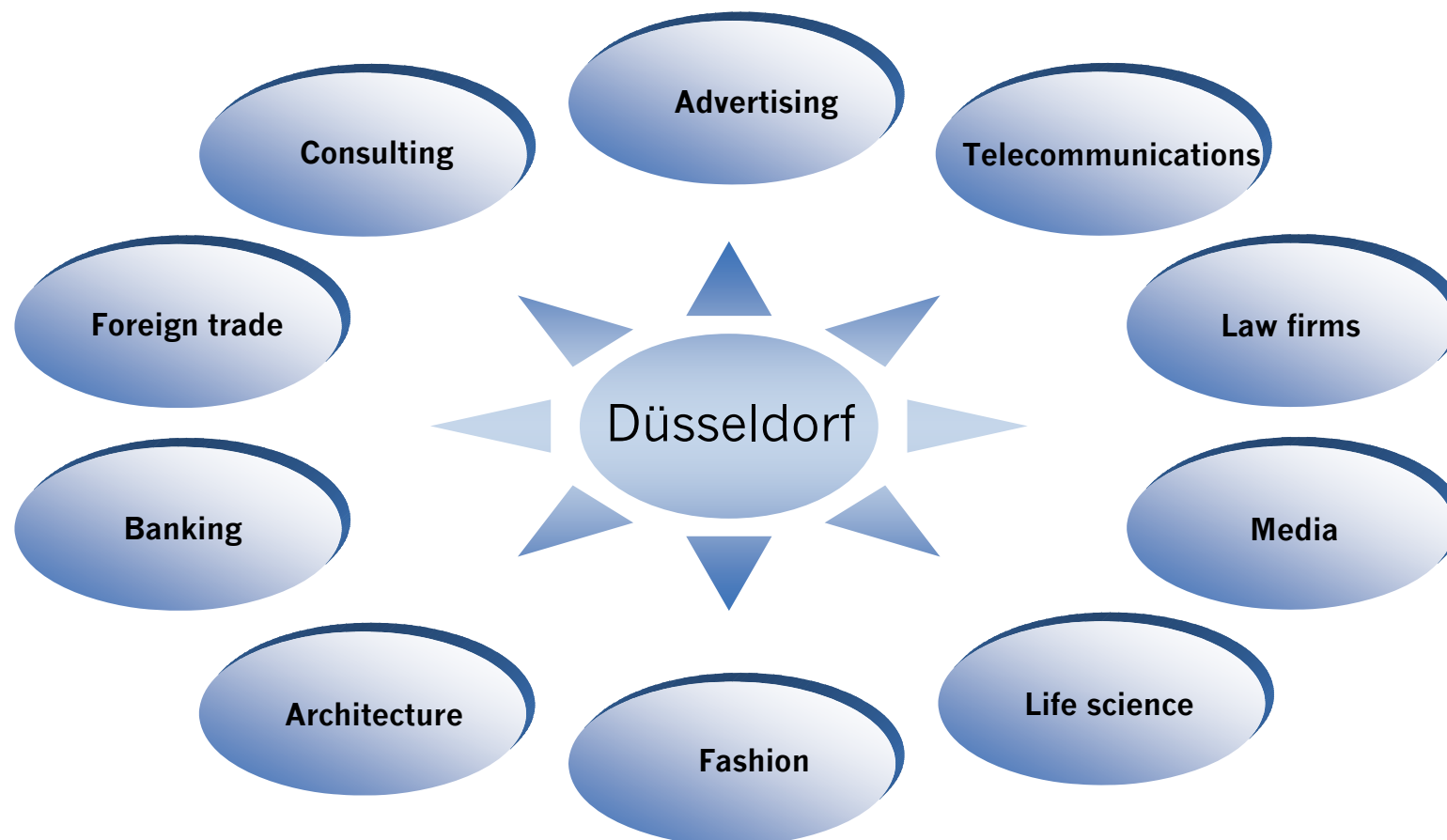


Source: Düsseldorf Tax Office V2011Q1.



Sector Strengths

Düsseldorf – Broad spectrum of strong sectors



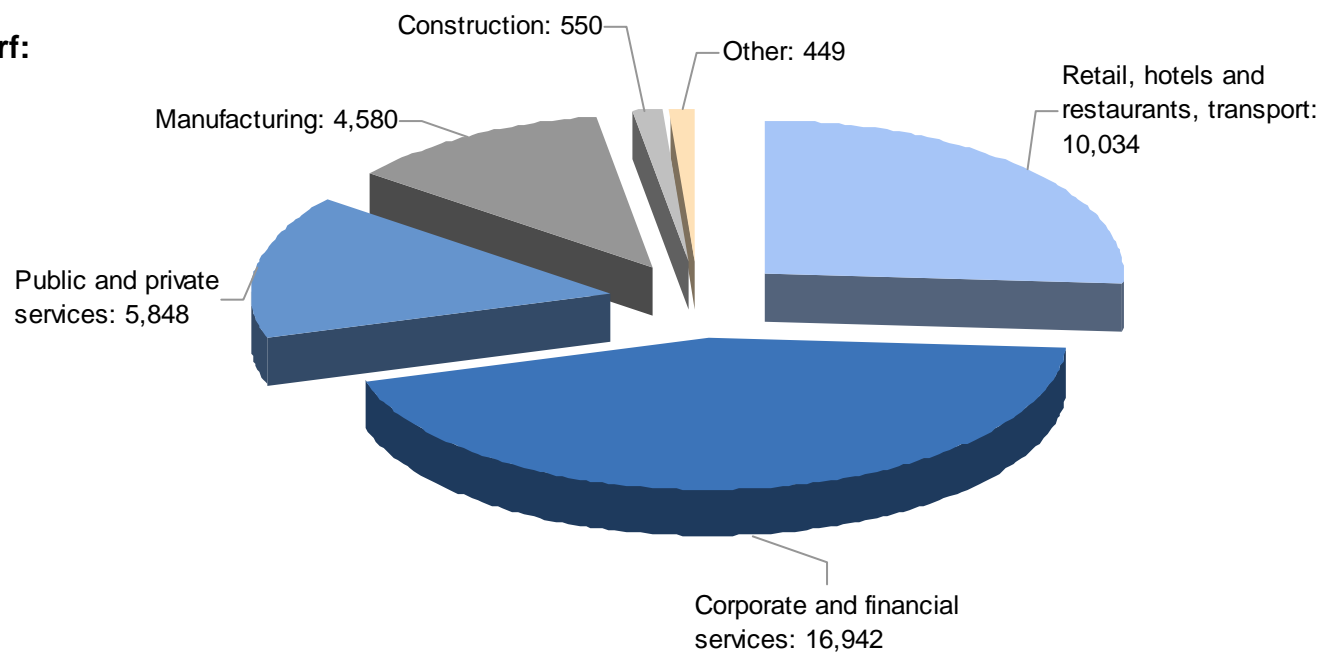


Sectors

Düsseldorf's highly productive sectoral mix

Gross value added in industry sectors in Düsseldorf in millions of euros

**Total gross value
added in Düsseldorf:
38,402 m €**



Source: Working party overall economic statement V2010H2. B2008.



Retail

Düsseldorf – Top retail location

- 4,078 retailers (incl. automobile trade)
- 2,142 wholesalers and foreign traders
- 77,600 employees in retail
- 810,500 m² of sales area
- Leading specialist trade fair “Euroshop”
- Exclusive shopping boulevard, the KÖ (Königsallee)
- Top fashion location



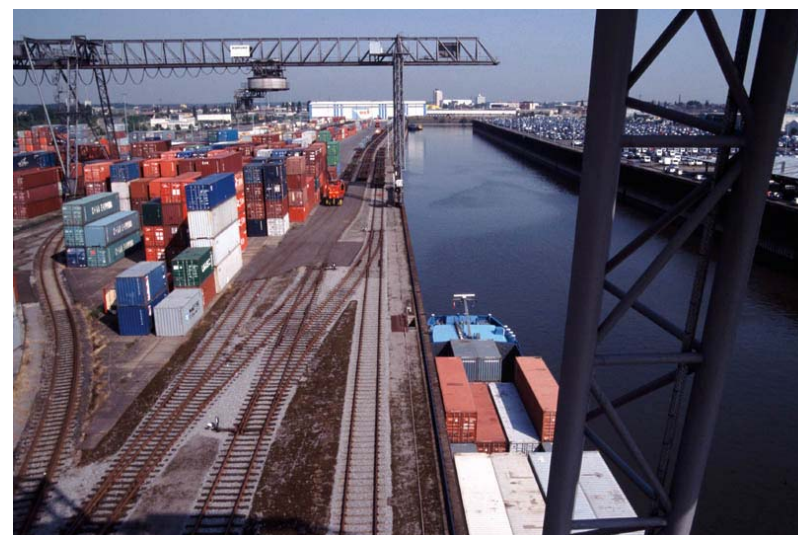
Source: Düsseldorf Office of Economic Development V2010H2



Retail

Prominent retail corporate groups located in Düsseldorf

- Metro – Wholesale and retail trade
- Salzgitter Mannesmann Handel (Steel)
- C & A (Fashion)
- Peek & Cloppenburg (Fashion)
- Schmolz & Bickenbach (Steel)
- Mitsui (General trading company)
- Mitsubishi (General trading company)
- Renesas (Electronics)
- Oracle (Software)



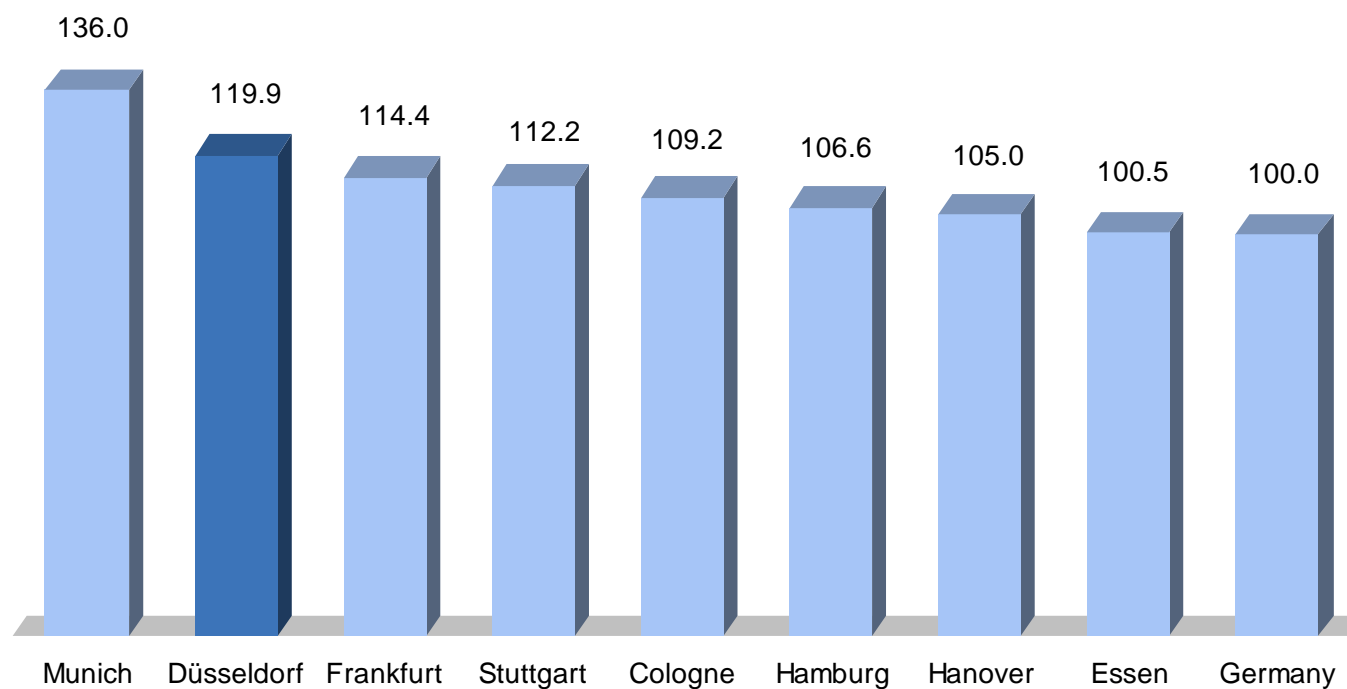
Source: Düsseldorf Office of Economic Development V2011H2



Purchasing Power

Substantial purchasing power of Düsseldorf's residents

Purchasing power indices in selected cities; Germany = 100



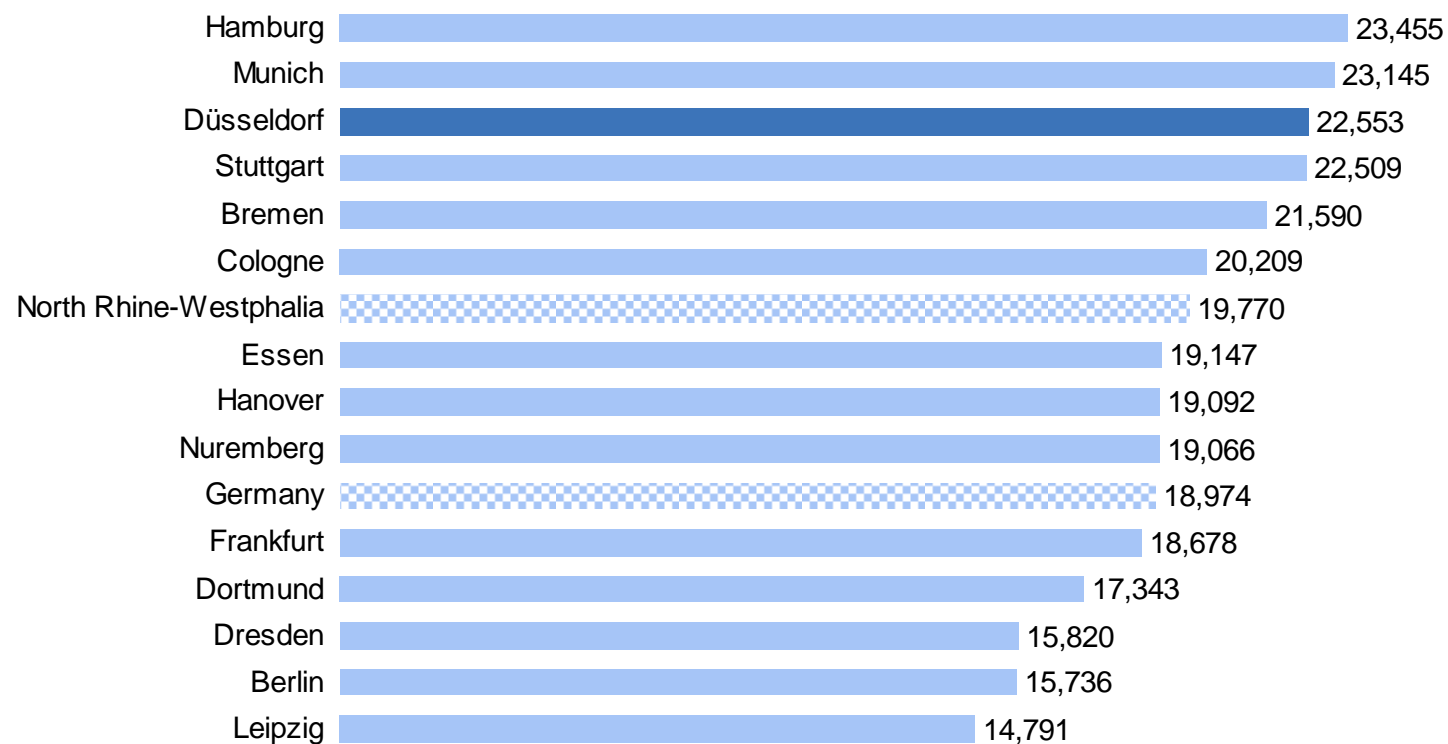
Source: GfK Nuremberg V2010.



Income

High disposable income in Düsseldorf

Disposable per capita income in Germany's cities in euros



Source: Working party overall economic statement V2010. Data as of 2008. Cities with over 500,000 inhabitants.



ICT

Düsseldorf's strengths as an ICT location

- Düsseldorf is the Mobile Capital of Germany
- 1,500 ICT companies
- 24,000 ICT employees
- Dynamic ICT market: 30% of ICT companies founded since 2002
- Over 30 network providers operating locally
- Headquarters of important institutions:
 - MobileMonday Düsseldorf
 - Digital City Düsseldorf
 - Bundesverband Digitale Wirtschaft
 - VAF Bundesverband Telekommunikation e.V.
 - Gemeinschaft Fernmeldetechnik e.G.





ICT

Top-class research in ICT region Düsseldorf

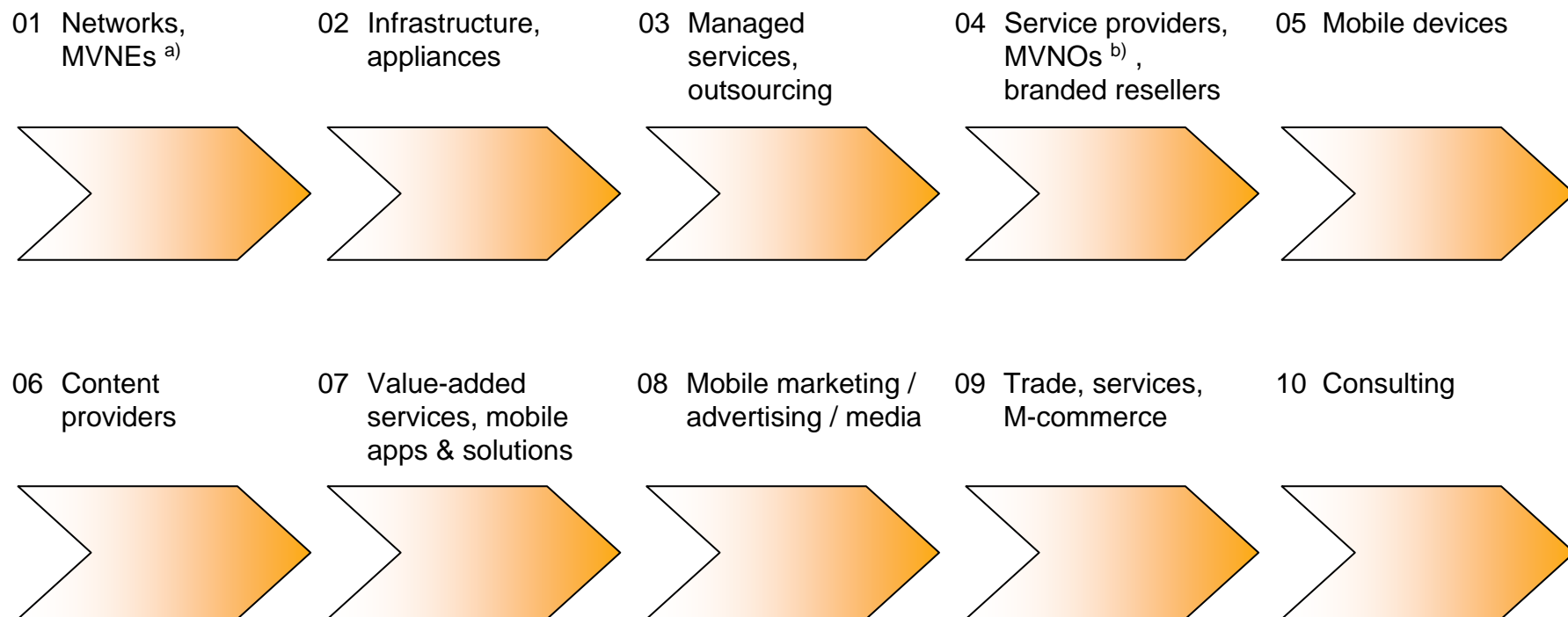
- Heinrich Heine University, Düsseldorf (Data center, Center for IT and Media, Institute for Computer Studies)
- University of Applied Sciences, Düsseldorf (Institute for Media, Communication and Information Technology)
- Fraunhofer Institute for Microelectronic Circuits and Systems
- Fraunhofer Institute for Software and Systems Engineering
- Fraunhofer Institute for Laser Technology
- Institute for Mobile and Satellite Technologies





ICT

Düsseldorf covers each step on the value-added chain in the mobile sector



^{a)} MVNE = Mobile Virtual Network Enabler, ^{b)} MVNO = Mobile Virtual Network Operator



Life Science

Düsseldorf – Competence in life science

Networks



- LifeScienceNet Düsseldorf (Düsseldorf area)
www.lifescience-dus.de
- BioRiver (Cluster in Rheinland region)
www.bioriver.de
- Bio.NRW (North Rhine-Westphalia)
www.bio.nrw.de

Source: Düsseldorf Office of Economic Development V2011



Life Science

Life science in Düsseldorf

- The Heinrich Heine University is one of the leading specialists in German life science research.
- Over 50 % of the turnover of life science companies listed in Germany is generated by spin-offs from the Heinrich Heine University.
- 94 highly innovative life science companies are located in the Düsseldorf area.
- 5,000 employees at biotech companies in the BioRiver region; 20,000 employees at pharmaceutical companies in the Rhineland area.
- 5,493 students are enrolled on courses in subjects related to life science.



Source: Düsseldorf Office of Economic Development V2011



Life Science

Innovative life science research in Düsseldorf

- Life Science Center covering an area of 21,000 m², adjacent to the University.
- University Hospital of the Heinrich Heine University
- Biological-Medical Research Center (BMFZ)
- German Diabetes Center (DDZ)
- Institute for Environmental Medicine (IUF)
- BioStruct NRW Research School
- Graduate Cluster Industrial Biotechnology



Source: Düsseldorf Office of Economic Development V2011



Real Estate

Düsseldorf – Top real estate location

- One of the biggest office markets in Germany (9.02 million m²)
- Stable office market, highly attractive to investors
- Quick availability of office space
- Headquarters of top architecture firms, such as HPP, Ingenhoven Architects, SOP Architekten, Kai 18, Petzinka & Pink, RKW, Eller+Eller Architekten
- Sufficient office space reserves
- Seat of the North Rhine-Westphalian Chamber of Architects



Source: Düsseldorf Office of Economic Development V2011H1



Real Estate

Düsseldorf – Playground of the world's celebrated architects

William Alsop	Colorium
Bothe Richter Teherani	Drei Hoch 5
Joe Coenen	DOCK
Sir Norman Foster	ARAG Hochhaus
Fürst Architects	Light House
Frank O. Gehry	Der Neue Zollhof
Ingenhoven und Partner	Sky Office Düsseldorf
Helmut Jahn	Sign
Daniel Libeskind	Kö-Bogen (under construction)
Fumihiko Maki	Maki-Solitär
Richard Meier	Feldmühlenplatz
Renzo Piano	Casa Stupenda (planning stage)
Claude Vasconi	Grand Bateau



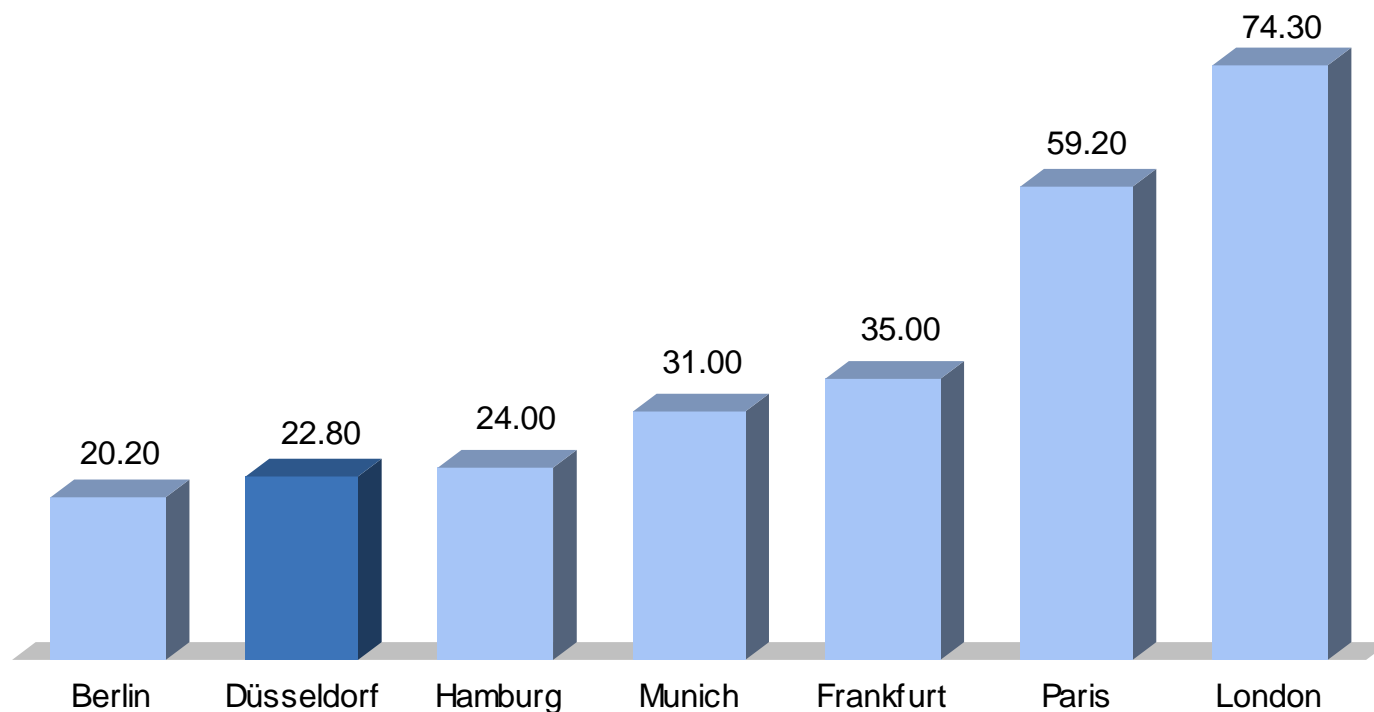
Source: Düsseldorf Office of Economic Development V2011H1



Office Market Rents

Reasonably priced office market rents compared to other European cities

Highest rents for office space in €/m²/month



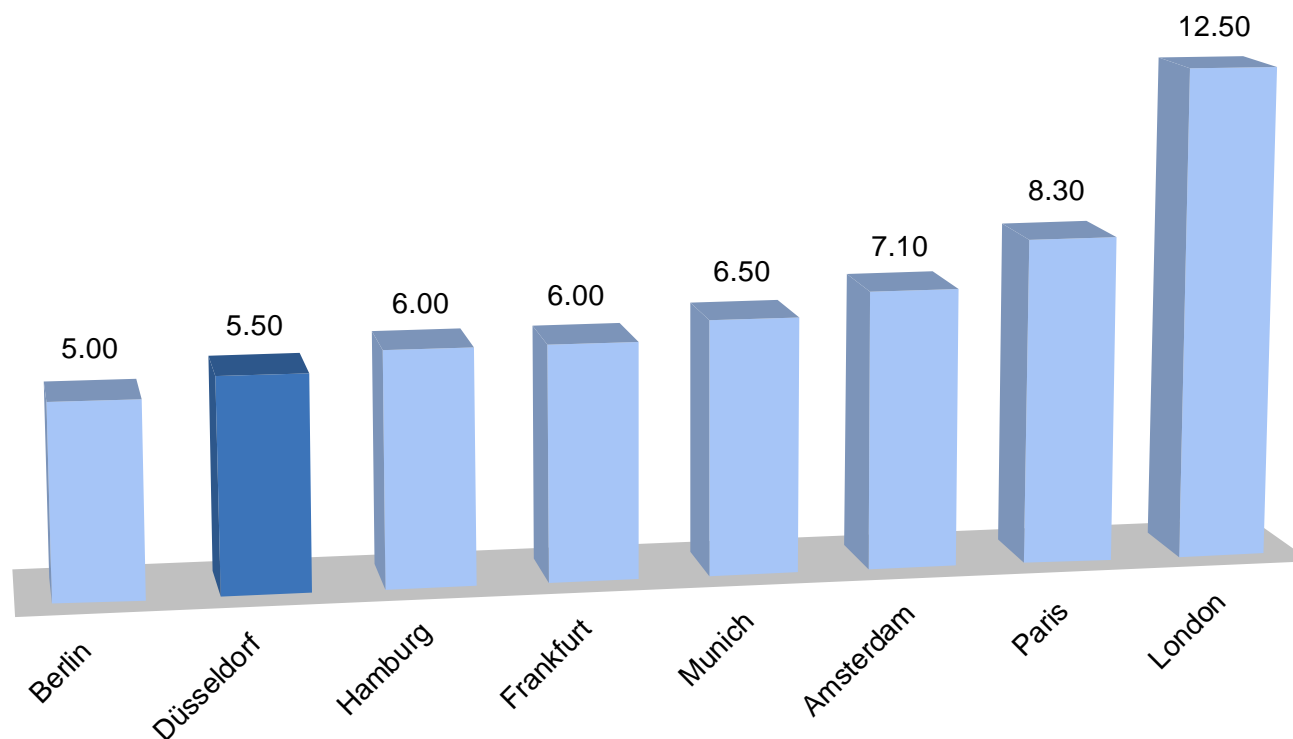
Source: BnP Paribas V2010. Data as of 2009 Q4. Value for Düsseldorf according to GIF V2010 .



Cost of Warehouse Space

Affordable warehouse space rents compared to other European cities

Highest net rents for warehouse space in European cities in €/m²/month



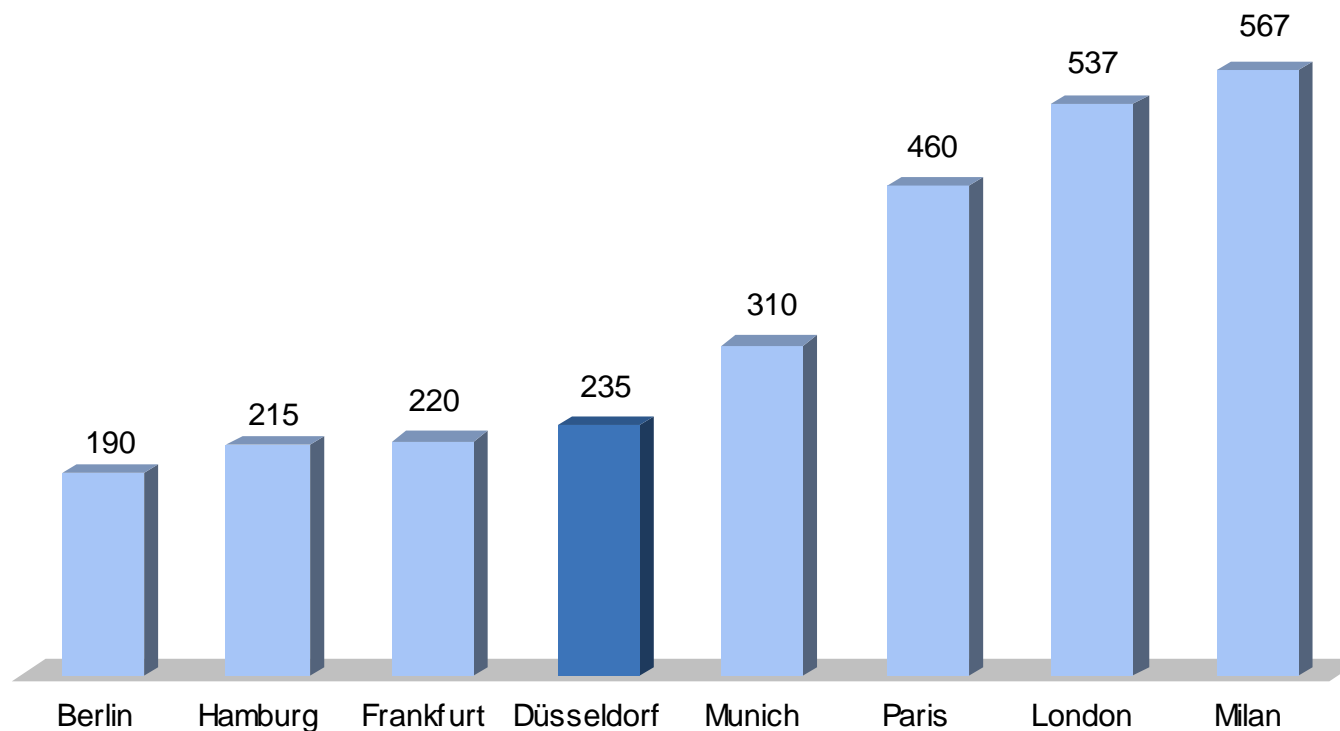
Source: Cushman & Wakefield. Industrial Space Across The World V2010. Data as of 2009 Q4. For London, conversion from pound sterling to euros. Exchange rate on 20.4.2010.



Retail Store Rents

Düsseldorf – Moderate retail store rents

Highest rents for retail stores in selected European real estate centers in €/m²/month



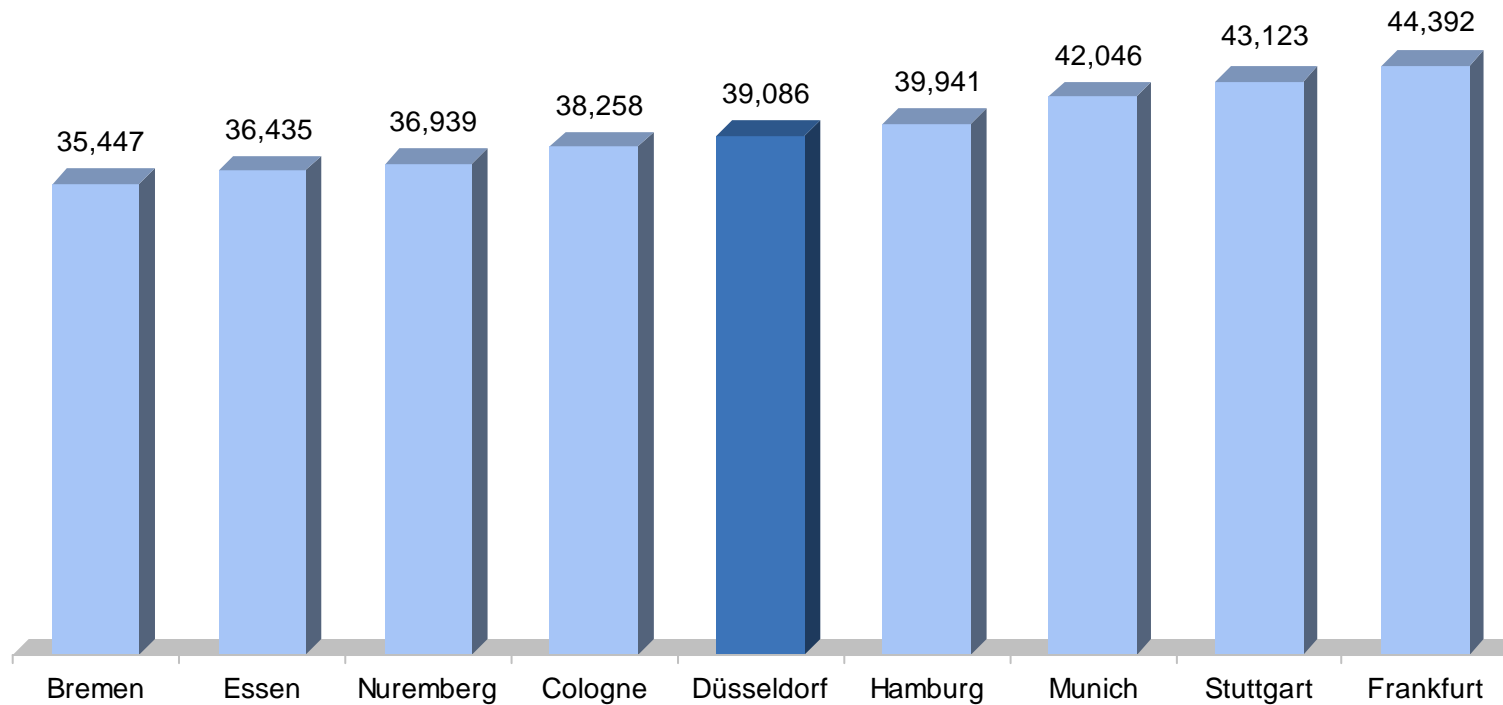
Source: JonesLangLasalle: Glanz und Glamour V2010, Data as of 2009 Q4. Figures based on different store sizes, depending on the country.



Personnel Costs

Moderate personnel costs

Nationwide comparison: Employee remuneration per capita in euros



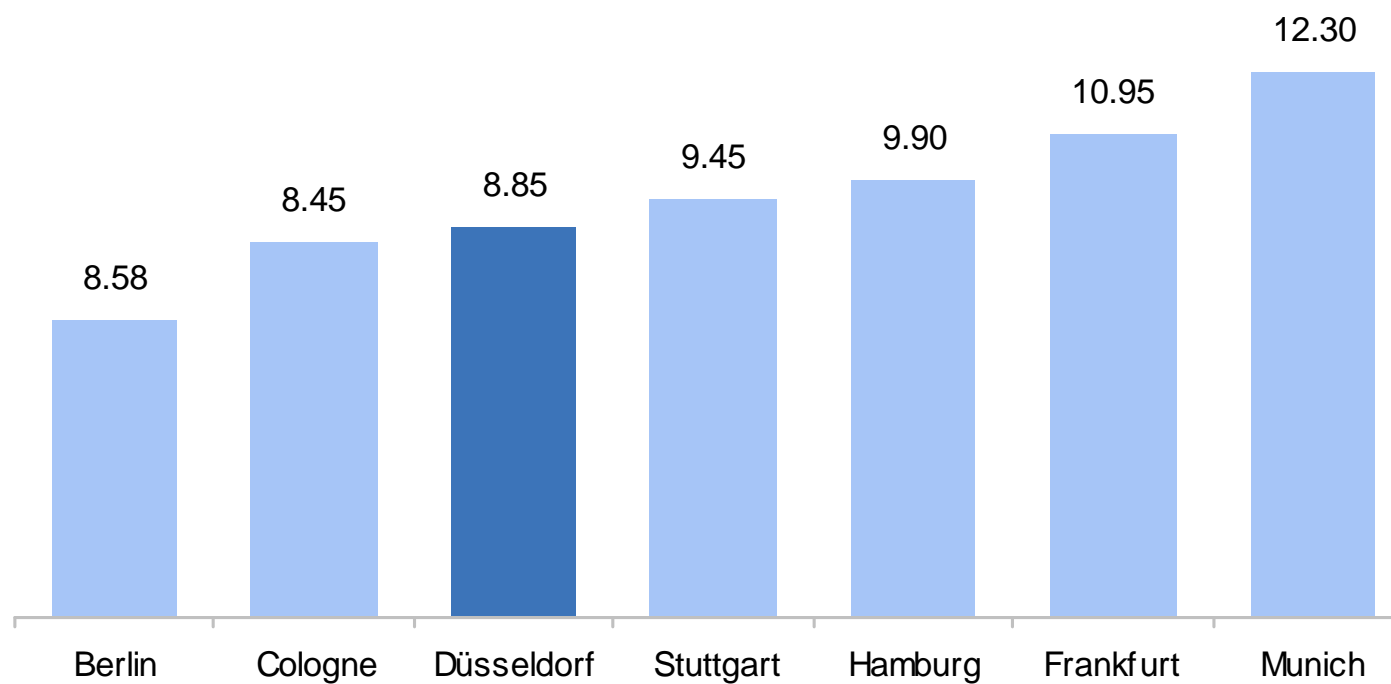
Source: Working party overall economic statement of the states V2010. B2008.



Apartment Rental

Apartment market – Comparatively low rents

Nationwide comparison: Average rents offered in €/m²



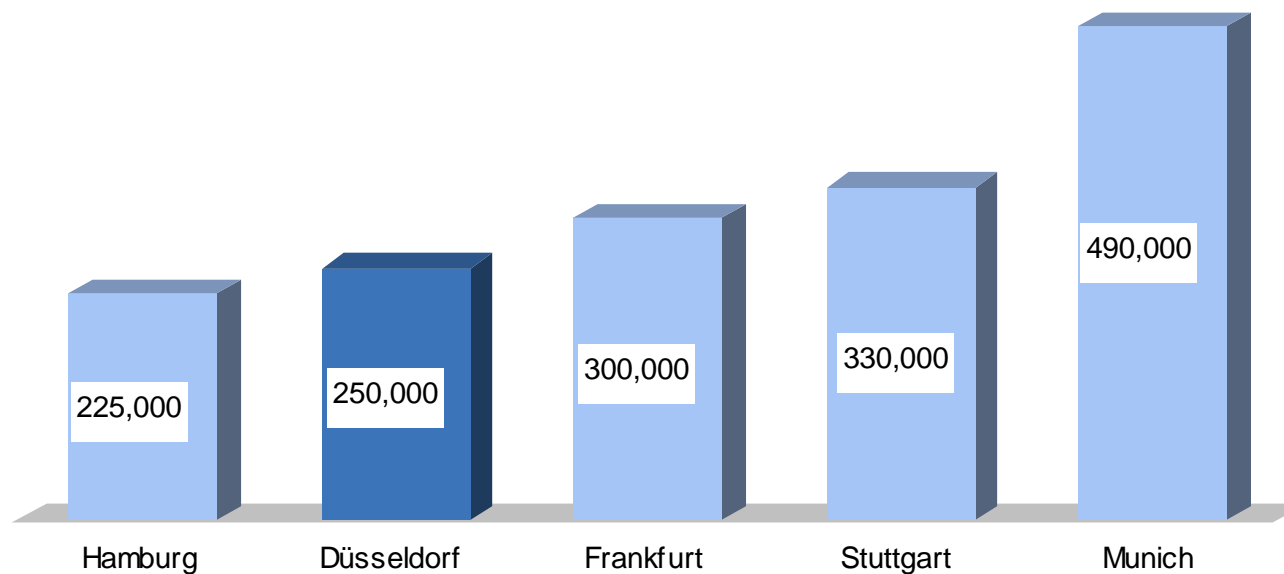
Source: IDN Immodaten GmbH, Jones Lang Lasalle. V2010. Data as of 2009. The average rents offered are the average rent prices of real estate on the market.



Property Ownership

Property market – Moderate property prices by German standards

Nationwide comparison: Most common overall price for terraced property in euros



Source: LBS V2010, survey period: April 2009. Most common overall property price in average to good location, approx. 100 m² living space, without garage, typical lot size for local area.