



Logistics in Bavaria – Best Prospects



Bavaria: Hub for logistics

Expediting the flow of goods

Twenty-seven member states and some 450 million consumers make Europe the world's largest single market. For the logistics industry, the expansion of the European Union and the accompanying structural changes in production, transportation and supply chain management, offer tremendous strategic opportunities. Logistics has hence become one of the most significant growth sectors in Germany with more than 2.2 million employees. To stay competitive and serve the new markets, particularly those in Eastern Europe, many companies are co-operating with international partners in putting additional logistics facilities into place in Europe. The world of logistics continues to cope with the challenges posed by such concepts as "outsourcing", "high-tech logistics", "global sourcing" and the like.

The State of Bavaria has what it takes to fulfill the industry's challenges. Centrally located in Europe, Bavaria is a major gateway to Central, Southern and Eastern Europe. The backbone of the State's logistics assets is reinforced by first-rate road and rail networks, port facilities with trimodal connections as well as international airports. Some 400,000 employees testify to the considerable role of logistics in Bavaria.

Nearly all major logistics enterprises and service organizations are at home in Bavaria, Prime examples are DHL, UPS, Schenker, Hellmann, Maersk, Hanjin Logistics, ProLogis and Goodman. Global players, like Dachser and DPD, are headquartered in Bavaria and make the state the hub of their operations and point of origin for their international freight and cargo shipments. In addition many foreign companies such as Ingram Micro, Office Depot, NYK Logistics and Rexel, chose Bavaria as their location for distribution centers.



➤ Logistics Competence in Bavaria
www.invest-in-bavaria.com/logistics

➤ Database of Bavarian logistics companies
www.key-technologies-in-bavaria.de

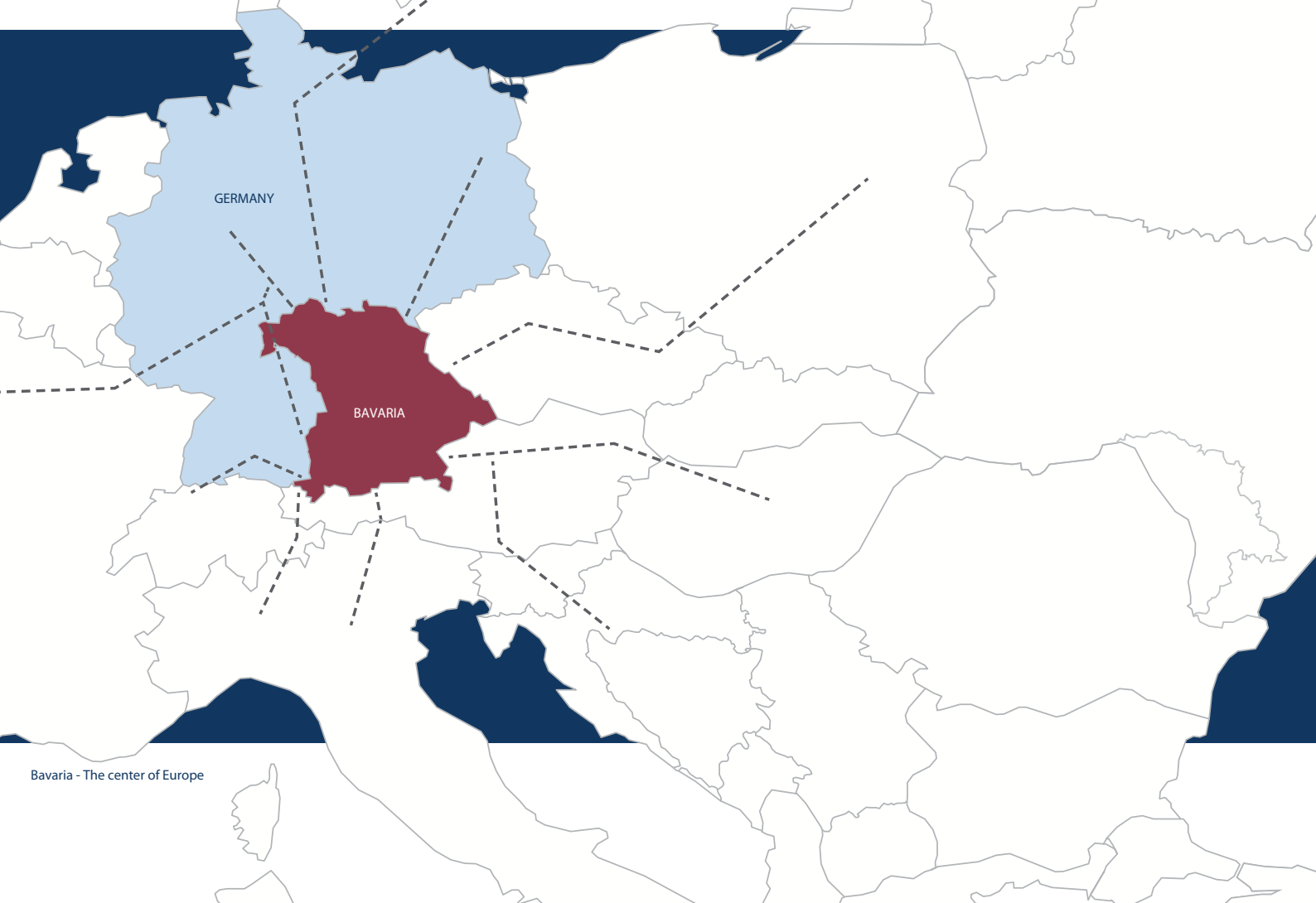
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Advantageous market environment

A dynamic growth market awaits logistics companies in Bavaria. The state provides a work environment with innovative partners specialized in nearly all logistic capacities and related cross-industry technologies – ranging from automotive to telematics, from information technology to air and space, from medical, energy and environmental technologies to facilities engineering and construction devices.

Bavaria is an ideal market consisting of numerous global companies and a dense network of more than 400,000 small and mid-sized industrial, craftsman and service enterprises that drive Bavaria's economy forward. Domestic as well as foreign investors gain quick access to a wide spectrum of competitive, highly sophisticated customers, suppliers and business partners. Leading specialty trade shows, conferences and events supporting Bavaria's 19 industry clusters provide opportunities for business networking and promotion platforms.

Its central location in Europe makes Bavaria the ideal launch pad for doing business in Eastern and South-Eastern Europe. Numerous logistics companies are taking advantage of the steadily growing intermodal rail and highway cross-Alpine traffic to Italy and the Balkan states. Fast connections to major ports like Trieste, Koper or Rijeka are guaranteed. The Rhine-Main-Danube waterway provides optimal links to Rumania, Hungary, Bulgaria, Croatia, Moldavia and the Ukraine. In addition companies profit from decades of increasingly closer economic and political ties between Bavaria and neighboring Eastern and South Eastern European countries. Ultimately this is one of many advantages of locating in Bavaria – rewards that are now being utilized by more than 1,500 foreign high-tech companies with locations in Bavaria.



GERMANY

BAVARIA

Bavaria's superior transportation web spans the globe

Bavaria is the dominant logistics location in Europe not only because of its prime location and attractive business environment, but also due to its exceptional transportation infrastructure



Thanks to its international airports in Munich and Nuremberg, air cargo reaches practically any destination in the world within 24 hours. Munich airport, frequently acclaimed as the best airport in Europe, offers more connections within Europe than any other German airport. Nuremberg's airport, with its comprehensive services, standards and quality has repeatedly won awards as Germany's best.



Bavaria's excellent network of roads, integrated into the autobahn and federal highway system combined with optimal connections to Europe's North-South and East-West transportation grid guarantee quick, dependable motor transport.



Bavaria's prospering inland water ports are optimal for facilitating cargo shipments to all European growth markets. The Rhine-Main-Danube waterway, nearly 2200 miles long, links Bavaria to major overseas ports on the North Sea and harbors on the Black Sea.



Bavaria reacted early to the trend of switching freight from road to rail. As a genuine alternative to trucking, the highly-efficient Bavarian rail network provides optimal connections within Germany and neighboring countries. Nineteen transshipment centers for intermodal traffic make for quick, secure and smooth transportation modal shifts.

The far-reaching network served by Bavaria's freight hubs (in Nuremberg, Regensburg, Ingolstadt, Straubing and Augsburg) supports intermodal traffic and provides outstanding requisites for modal shifts.

The following Bavarian regions exemplify the high quality and range of facilities available to shippers.



Nuremberg

Metropolitan Nuremberg, one of the top sites for logistics companies in Europe, features

- a state of the art transportation infrastructure
- optimally linked network of carriers
- all-encompassing competencies in logistics
- substantial technological know-how
- qualified, motivated employees
- efficient logistics companies
- proximity to major consumer and supplier markets

Bavaria's Lower Main Region

"Bayerischer Untermain", the Bavarian logistics region in the Rhine-Main river area:

- headquarters and largest hub of DPD, the German package service
- "trans-o-flex" hub, B2B Logistics Group
- two logistics parks with numerous contract service providers
- Logistics Laboratory at Aschaffenburg's University of Applied Sciences specializing in production and logistics processes simulations

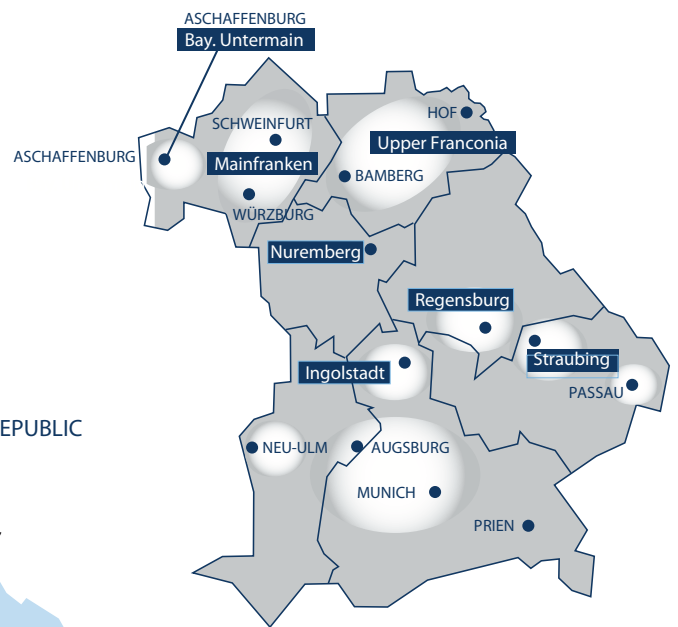
Regensburg

- Bavaria's "Gateway to the East"
- Direct German and international intermodal traffic connections
- One of the top 5 business sites in Germany
- Top companies in Regensburg include General Electric, Areva, BMW, Continental, Infineon, Osram OS, Maschinenfabrik Rheinhausen, etc.
- Exemplary city logistics plan for Regensburg's historic district (RegLog®)
- Bavaria's largest inland port (bi- and tri-modal cargo handling)

Ingolstadt

Ingolstadt's GVZ freight hub, focused on automotive logistics, is an industrial park with

- 83-hectares, of which about 22 hectares have indoor facilities devoted to logistics and related services
- optimal links to road and rail network
- intermodal freight handling railroad station (KLV)
- connection to Munich airport within 45 minutes



Logistics in Bavaria – In-depth expertise state wide

Excellent locations for logistic functions and services are available throughout Bavaria at prime industrial sites, ideally suited for distribution centers and for round-the-clock operations. Currently Bavaria's inventory of industrial real estate totals more than 13,000 hectares. For details: www.sisby.de



GVZ Region Augsburg

Augsburg is the hidden champion among Germany's logistics bases, and is an attractive alternative to Munich. Augsburg offers world-class infrastructure and strong demand from the local manufacturing sector and from the region's consumers, who are equipped above-average purchasing power. Covering 112 hectares and offering 73 hectares of usable space, Augsburg's GVZ Freight Forwarding Center has direct links to the A8 superhighway and to the B17 federal highway, as well as to the rail grid maintained by Deutsche Bahn and by Augsburg's authority. A rail link running through a bi-modal terminal is scheduled for 2012.



Mainfranken

This major region for logistics benefits from

- outstanding connections to the European road network
- proximity to Frankfurt and Nuremberg airports
- education majors in Logistics and Interdisciplinary Logistics R&D offered by University of Würzburg and University of Applied Sciences at Würzburg-Schweinfurt (IAL Institute)
- home to leading international companies that provide sophisticated logistics systems, tracking & tracing, IT logistics systems



Straubing

- Straubing-Sand, one of the largest Logistics and Industrial parks on the Danube River in Southern Germany, efficient connections to autobahn, inland waterways, rail and a regional airport. Munich airport is within 60 minutes by car.
- Core competencies include freight forwarding, contract and port logistics as well as transfer of biomass shipments.
- Numerous European distribution centers bear testimony to Straubing's role as a gateway to Southern and Eastern Europe.



Upper Franconia

- East-West logistics hub
- Logistics science centers at Bamberg, Bayreuth, Coburg and Hof Universities offer masters degrees in Logistics
- Kulmbach transportation academy and Bayreuth transportation education center projects; promotes air service between Hof and Frankfurt.

Knowledge transfer – Strong in research and networking



Early on, Bavaria recognized the need and took action to intensify synergies between the economy and science as well as between global enterprises and small and mid-sized companies. As part of the state government's cluster initiative, the Bavarian logistics cluster has encouraged closer ties between companies, research facilities and state institutions, such as universities. The tasks of the logistics cluster range from initiating and supporting market-relevant projects, to taking on proactive measures where various logistics technologies interface with other clusters, to arranging topically focused forums and working groups. Cluster activities focus on automobile logistics, supply chain management, construction logistics, health care logistics, logistics for public institutions and transportation logistics.

We invite you to take part in the activities of Bavaria's logistics cluster!



Being part of the regional network – a key to success

In addition to the activity of the Bavarian logistics cluster, logistics firms in Bavaria also draw benefit from the presence of strong partners as well as regional logistics networks. From Aschaffenburg in the north to Rosenheim in the south, from Bayreuth in the east and Neu-Ulm in the west - throughout Bavaria, interested companies take advantage of platforms ideal for making contacts, identifying potential customers and developing new ideas cooperatively. Close relationships between Bavaria's companies and research institutions enable the initiation and implementation of research projects.

Ties to Bavaria's research institutions pay off in the launch and implementation of research projects.

- Tradeshow in Munich:
www.messe-muenchen.de
www.transportlogistic.de
- Tradeshow in Nuremberg
www.nuernbergmesse.de
www.e-procure.de
- Calendar of Events for the
Bavarian industry clusters:
www.cluster-bayern.de/veranstaltungen

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- Bavaria's clusters campaign:
www.cluster-bayern.de
- Bavaria's Logistics Cluster:
www.cluster-logistik.de
- Bayern Innovativ:
www.bayern-innovativ.de
- Fraunhofer Center for Applied
Research on Supply Chain Services SCS:
www.scs.fraunhofer.de
- Bavaria's Railway Technology Cluster:
www.cluster-bahntechnik.de

Where the logistics industry meets

The fairs in Munich and Nuremberg offer Bavarian logistics enterprises outstanding platforms for marketing products and meeting local and international partners for potential cooperative efforts. Numerous international top-ranked fairs such as "transport logistic" in Munich, a European leader in its field, as well as the "e_procure & supply" in Nuremberg attract visitors from around the globe. The calendar of fairs is supplemented by high-level industry congresses, particularly by the Bavarian logistics cluster, for example: "Logistik Innovativ".



- Institutions of higher learning in Bavaria
www.stmwfk.bayern.de
- Educational service of Bavarian business
www bbw.de
- Association of Bavarian transportation and logistics companies
www.lbt.de
- European logistics academy Chiemsee :
www.eulac.de

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Vocational and professional education

To a large degree the economic success of a business is based on the qualifications of its employees. The complex fields within the business of logistics make Bavaria's widely diversified education of employees indispensable.

Bavaria accords vocational and professional education in logistics highest priority. More than 20 Bavarian universities and schools of applied science offer majors in various logistics subjects. This effort is supported by continuing education in Bavarian vocational schools, the state's chambers of commerce and private educational institutions. In addition, the two Bavarian transportation and forwarding industry associations provide comprehensive information on labor laws and offer continuing education programs.

Moreover, bbw, the educational service of the Bavarian business community, operates its own logistics academy for advanced education for employees.

- CNA Center for Transportation and Logistics Neuer Adler e.V. :
www.c-na.de
- Logistics Center of Innovation Prien:
www.lkzprien.de
- Logistics Agency Upper Franconia:
www.logistics-ofr.de
- Logistics competence in Bavaria:
www.invest-in-bavaria.com/logistics

Links

Where it all comes together

Invest in Bavaria is the Business Promotion Agency of the Bavarian Ministry for Economic Affairs. Our international team offers comprehensive and confidential assistance during your business establishment or expansion in our State. We offer continuous support during all phases of the investment process and provide contact to valuable partners, organizations and networks in Bavaria. Our service is free of charge to you.

Please contact us. We look forward to assisting you, and to welcoming you in Bavaria.

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