



City of
Düsseldorf

Location Profile Düsseldorf



:DÜSSELDORF



City of
Düsseldorf

Accessibility

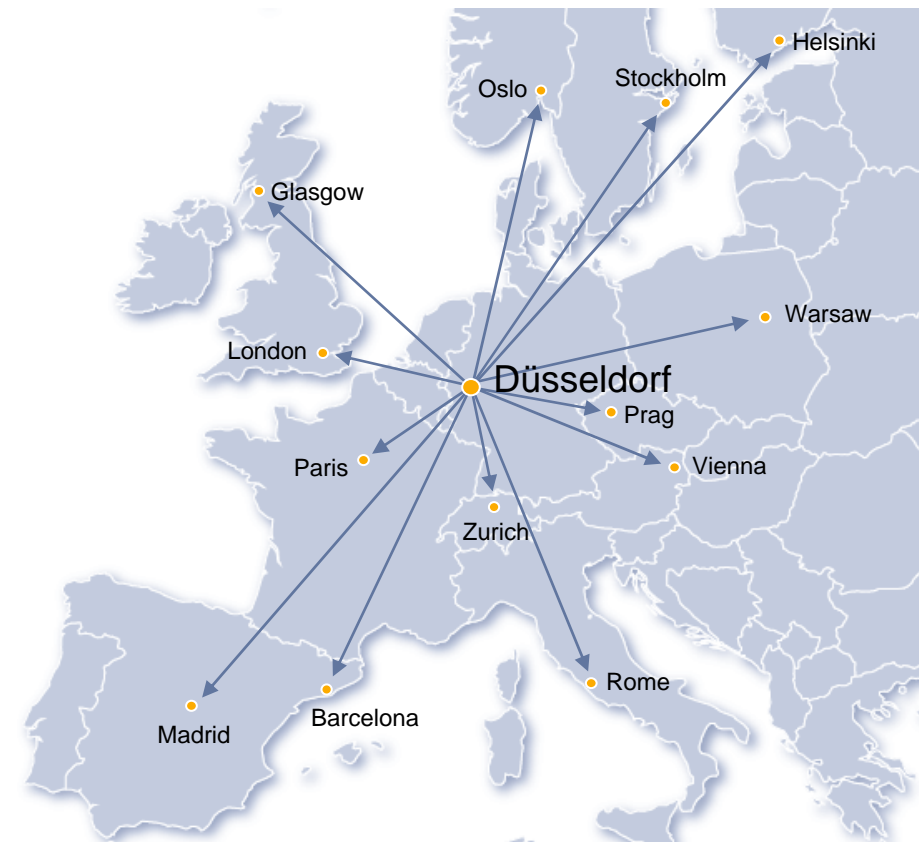
Düsseldorf –
Central location,
Easy accessibility



Accessibility

Düsseldorf – fast connections to Europe’s economic centres

From Düsseldorf to:	Fastest road distance in km	Flight time in minutes
Amsterdam	229	60
Barcelona	1,391	130
Berlin	558	60
Brussels	203	154*
Edinburgh	1,205	90
Frankfurt	227	55
Helsinki	1,845	145
London	568	80
Luxembourg	212	45
Lyon	752	90
Madrid	1,771	150
Milan	863	95
Oslo	1,323	105
Paris	505	75
Prague	734	80
Rome	1,439	130
Stockholm	1,373	120
Warsaw	1,111	110
Vienna	937	100
Zurich	602	80
From Düsseldorf to:	Fastest road distance in km	Flight time in minutes



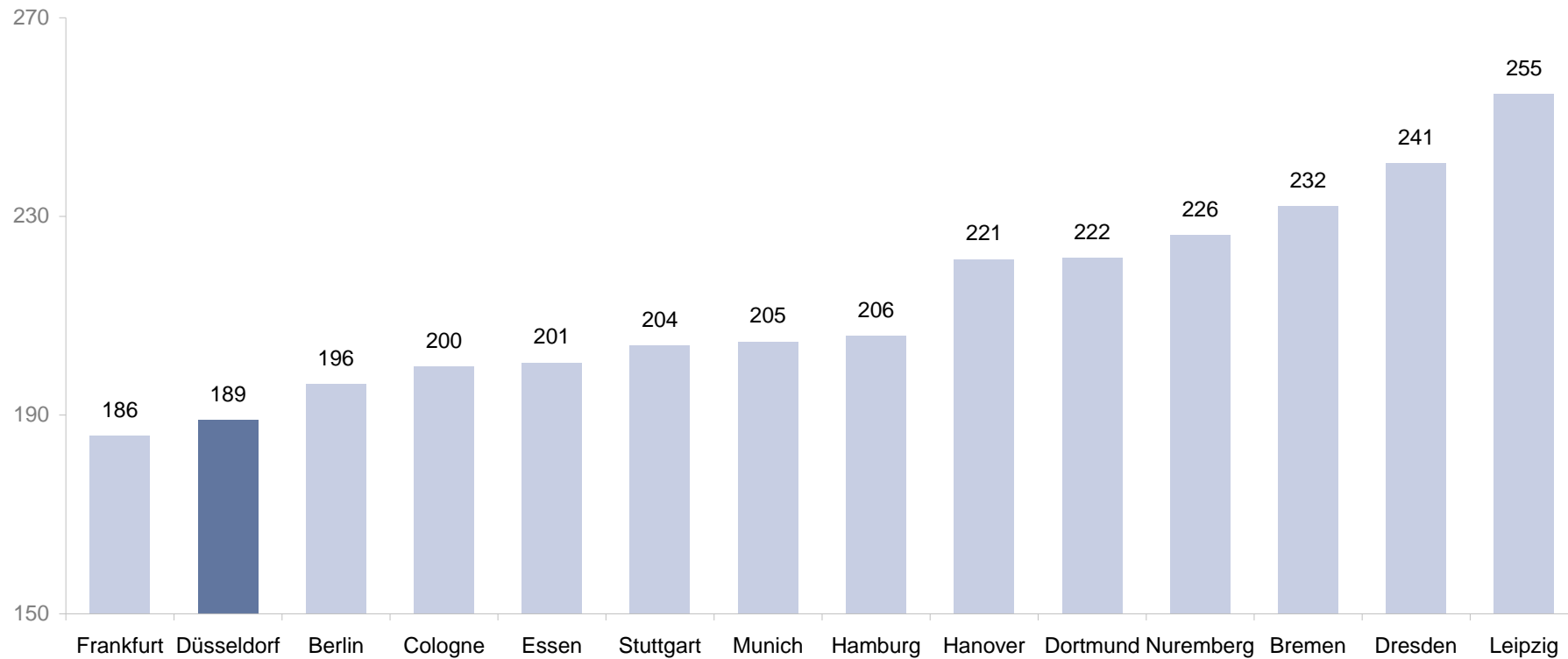
Source: Falk Routenplaner, Düsseldorf Airport, Deutsche Bahn AG V2013Q2. * = For Brussels , data on train connection in minutes.



Accessibility

Düsseldorf – easily accessible from other European cities

Average travelling time to 41 European cities in minutes



Source: BBR V2013Q2 B2012. Average travelling time by combined car/air transport to 41 selected European conurbations.



Accessibility

Düsseldorf Airport

Key data for Düsseldorf Airport

- third-largest airport in Germany
- around 20 m. passengers p.a.
- around 222,000 flights p.a.
- over 100,000 t air freight p.a.
- 60 airlines
- over 180 destinations worldwide
- connections to major European destinations at least twice a day
- more than 100 intercontinental flights a week
- fast connections to the city (13 min. by S-Bahn)
- around 19,500 jobs in airport as a whole

Worldwide non-stop destinations from Düsseldorf

Flight destinations from Düsseldorf (examples)	Destination country
Abu Dhabi	United Arab Emirates
Atlanta	USA
Bangkok	Thailand
Chicago	USA
Istanbul	Turkey
Lisbon	Portugal
Los Angeles	USA
Miami	USA
Moscow	Russia
New York	USA
Peking	China
St. Petersburg	Russia
Tripolis	Libya
Toronto	Canada

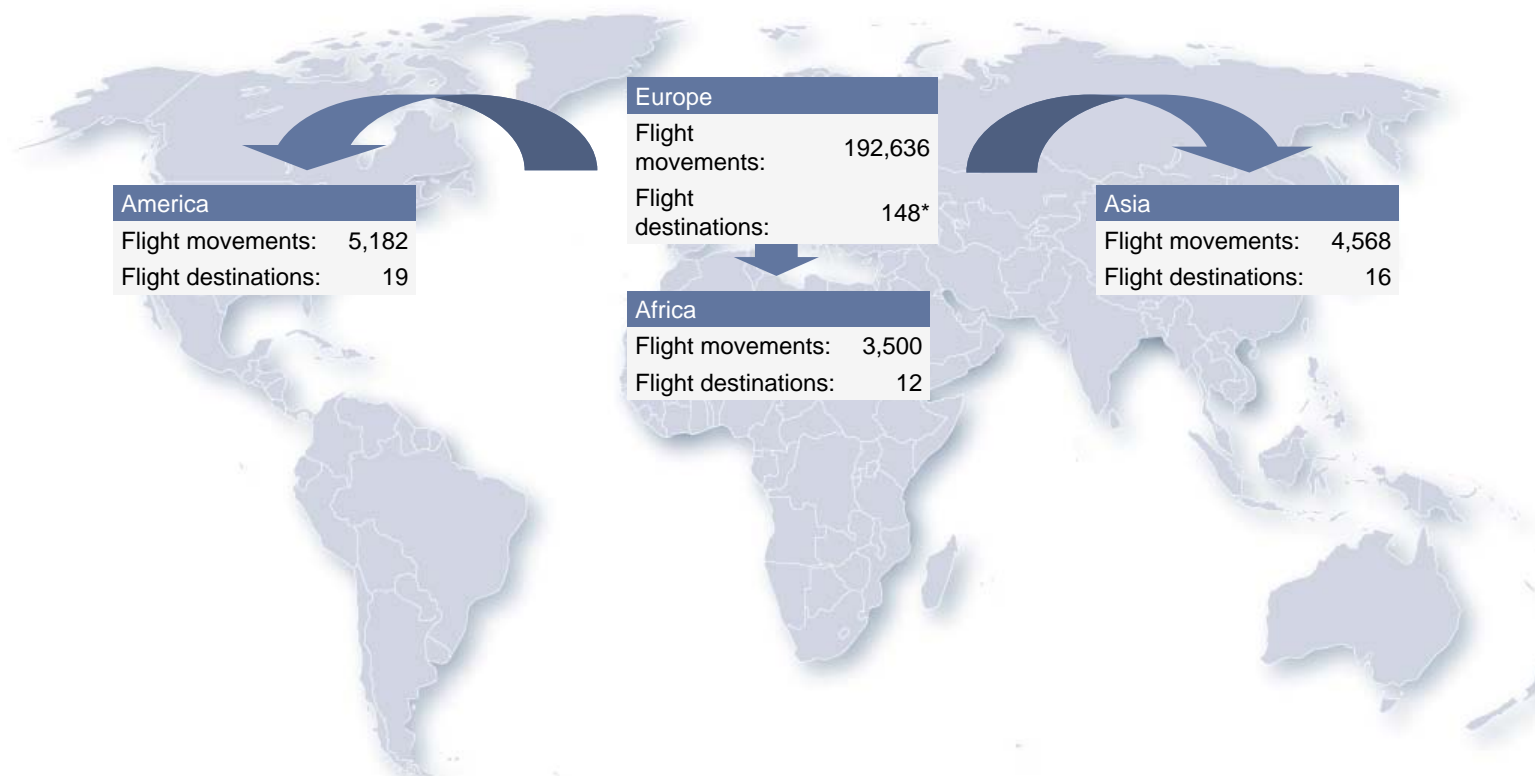
Source: Flughafen Düsseldorf GmbH V2013Q2.



Accessibility

Düsseldorf International Airport – worldwide connections

Annual international flight movements and the number of flight destinations between Düsseldorf Airport and the continents



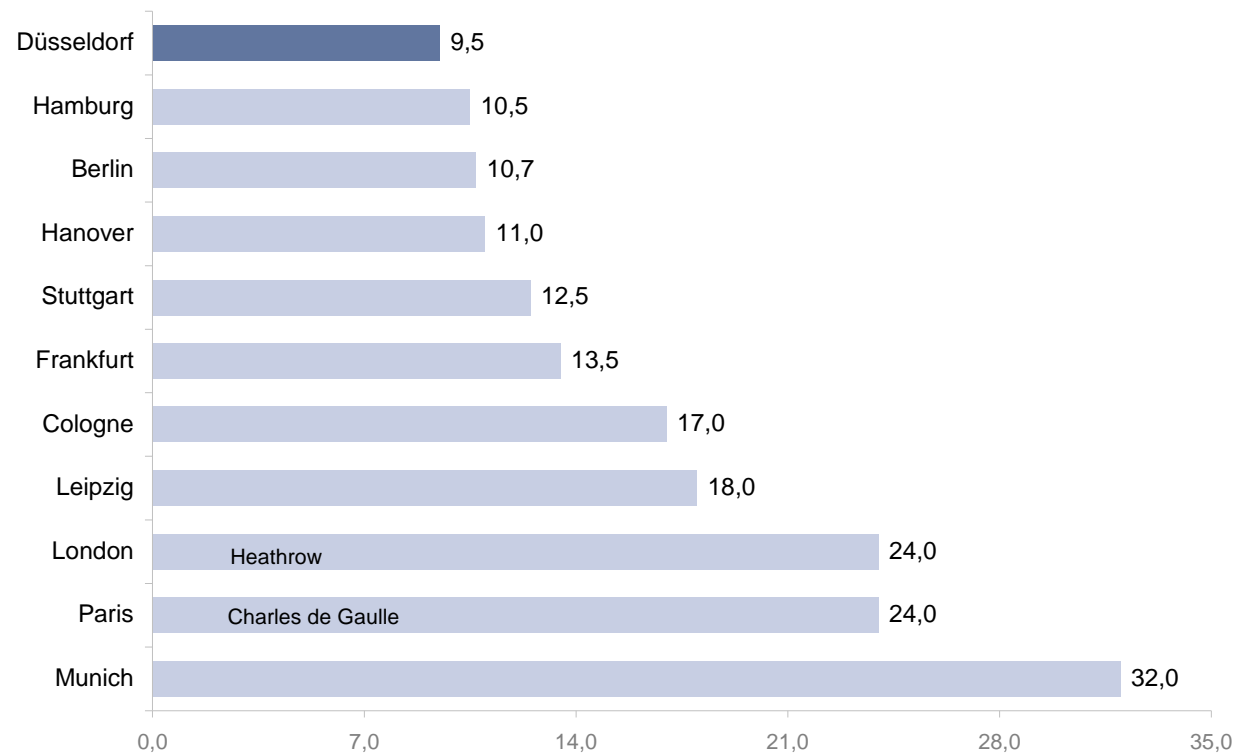
Source: Flughafen Düsseldorf GmbH V2013Q2. * = of the 148 European destinations, 10 are German inland destinations.



Accessibility

Düsseldorf Airport has the shortest distance to the city

Road distance from airport to city in km



Source: Own research with map24.de and viamichelin.de V2011Q3



Accessibility

Complete transport infrastructure

Rail

- over 900 train departures a day
- 150 long-distance trains daily
- over 300 train stops at airport station
- Rheinbahn AG has “AA” rating

Motorway

- 13 inner-city motorway connections
- 50 inner-city motorway kilometres
- 13 Park & Ride car parks

Rhine Port

- Rheinhafen (Rhine Port)
- Total area: 5 km²
- 16.4 m. tons freight volume
- 30 loading facilities
- 17 port trains



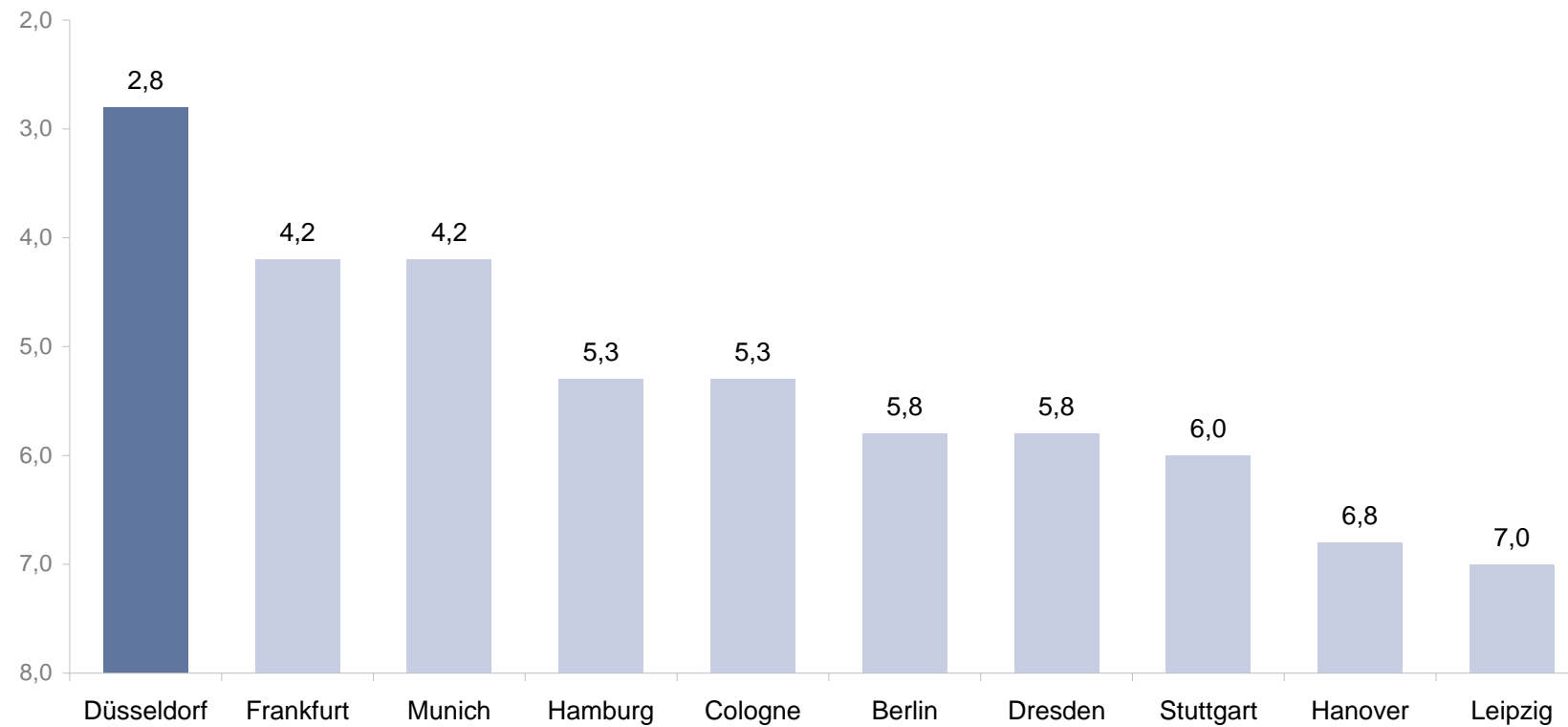
Sources: Deutsche Bahn AG, City of Düsseldorf Statistics Office, Neuss Düsseldorf GmbH. All data from V2010.



Accessibility

Top marks for Düsseldorf transport system

Marks given to various transport indicators (from 1 to 10)



Source: Bellevue-Studie V2011Q3. Category "Transport". Marks given from 1 (= top) to 10 (= flop).



City of
Düsseldorf

Economic strength

Düsseldorf -
metropolitan
region with great
economic
potential



Economic strength

Düsseldorf – economic powerhouse in Europe

Up to one hour away by car

- 11.6 million inhabitants
- 500,000 companies


Up to 500 km away

- 155 million inhabitants
- 31 % of total EU population
- 50 % of EU purchasing power

Up to one hour's flight away

- Amsterdam, Brussels, Frankfurt, Hamburg, London, Luxembourg, Paris, Zurich



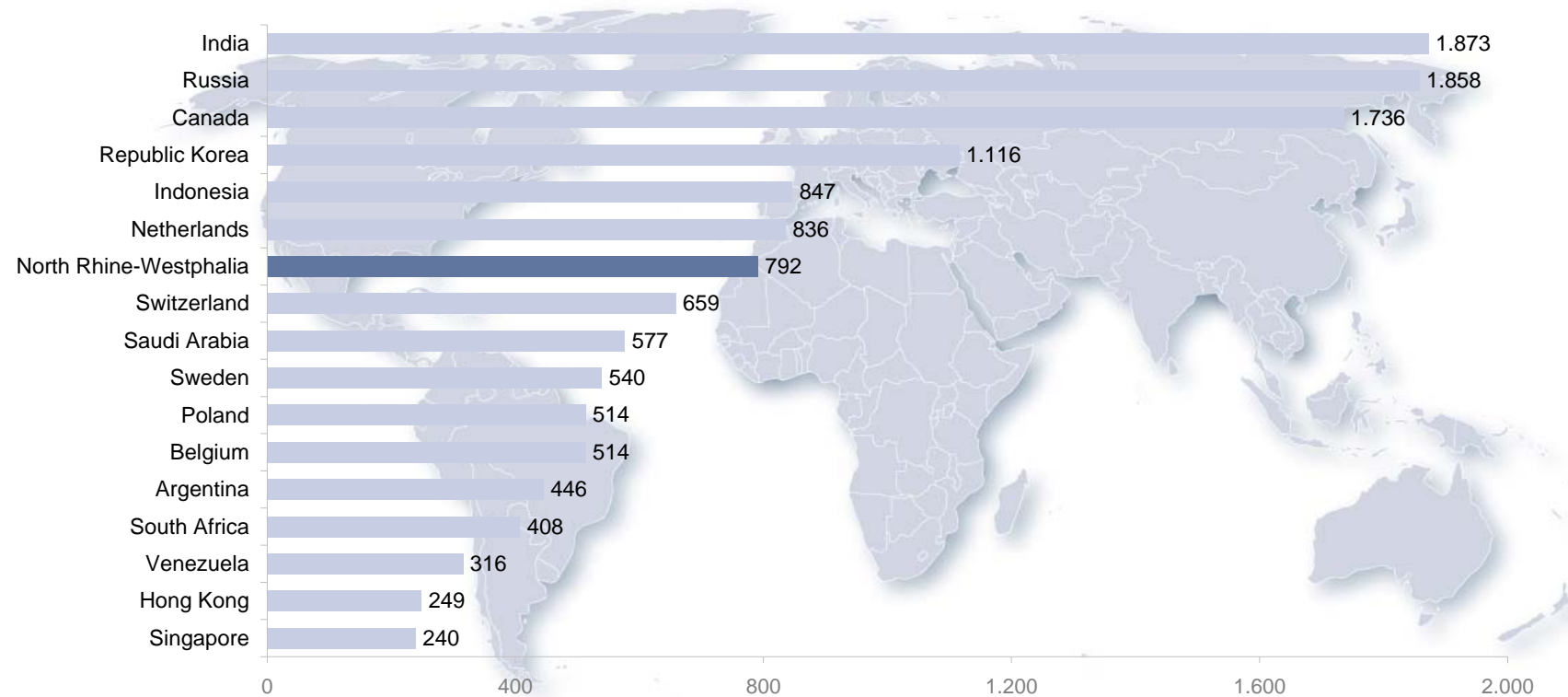
 500 km radius with 155 million inhabitants



Economic strength

North Rhine-Westphalia competes with strong country economies

Gross domestic product of selected countries in USD billion.



Sources: Weltbank, Gross Domestic Product Ranking V2013Q2 B2011, ITNRW, Gross domestic product V2012Q2 B2011. Conversion rate Euro - US Dollar in accordance with average rate for 2011 of Deutsche Bundesbank. North Rhine-Westphalia is ranked 18th in an international country comparison.



Economic strength

Düsseldorf business market - in the same league as New York, London or Paris



Rhine-Ruhr Region

Area	11,738 km ²
Inhabitants	11.6 Mio.
-----	60 km

Source: IKM, BBSR.



Metro-Region New York

Area	6,120 km ²
Inhabitants	14.0 Mio.
-----	70 km

Source: U.S. Census Bureau. Area: Adjusted area of Metro-Division.



Greater London

Area	14,188 km ²
Inhabitants	13.6 Mio.
-----	90 km

Source: Greater London Authority.
The area shown corresponds to Greater London plus the adjoining counties.



Paris – Ile de France

Area	12,000 km ²
Inhabitants	11.7 Mio.
-----	70 km

Source: INSEE, France



Economic strength

Düsseldorf region – largest economic centre in Germany

Düsseldorf - Rhine - Ruhr	
Inhabitants	11.6 m.
Employees	5.7 m.
GDP in €	357.7 m.

Frankfurt region	
Inhabitants	5.5 m.
Employees	2.9 m.
BIP in €	200.5 bn.

Stuttgart region	
Inhabitants	5.3 m.
Employees	2.7 m.
GDP in €	167.8 bn.



Hamburg region	
Inhabitants	5.1 m.
Employees	2.5 m.
GDP in €	161.7 bn.

Berlin region	
Inhabitants	6.0 m.
Employees	2.7 m.
GDP in €	146.1 bn.

Munich region	
Inhabitants	5.5 m.
Employees	3.0 m.
GDP in €	211.2 bn.

Sources: IKM, BBSR V2010Q4.



Economic strength

Düsseldorf region – strong partners make for a strong location



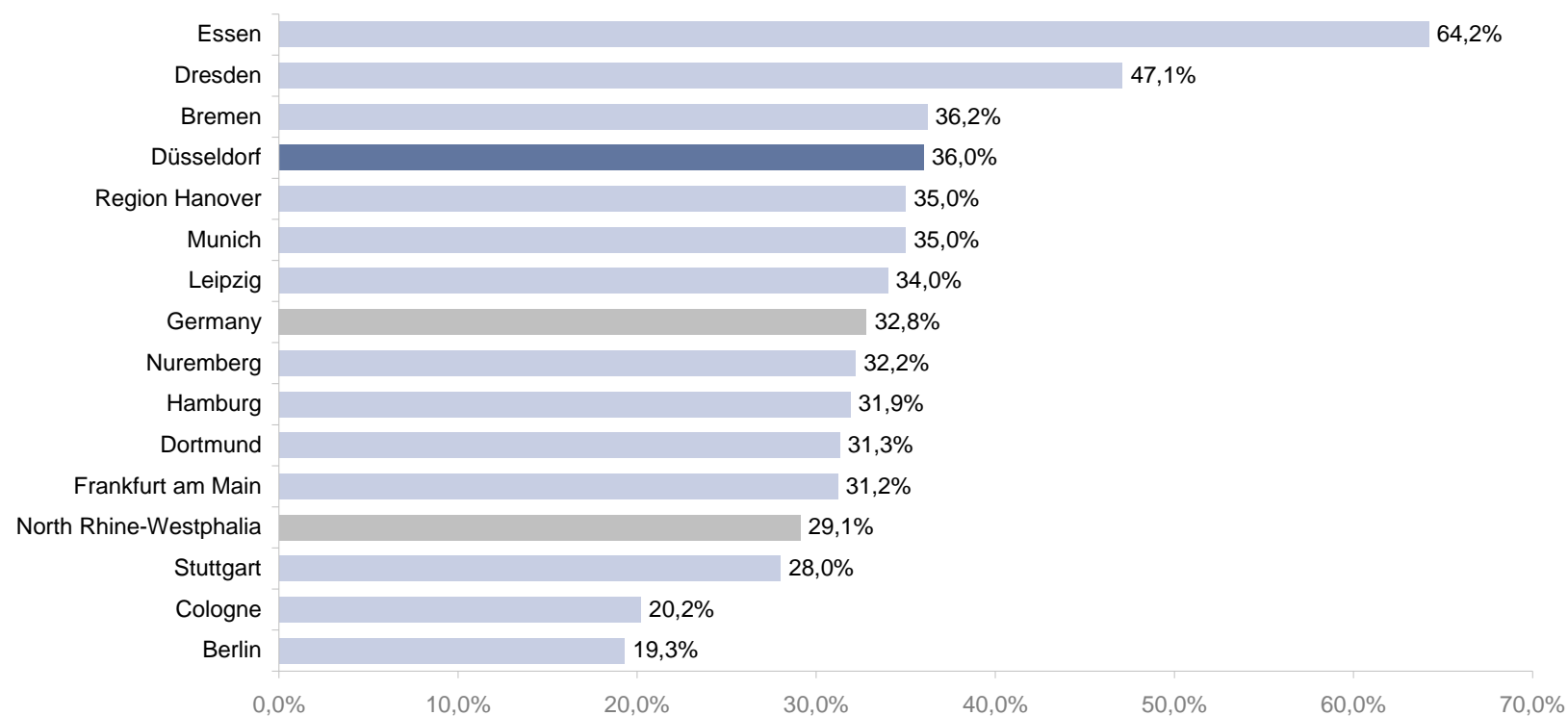
Key data on Düsseldorf region	Figures
Area in km ²	1,201
Inhabitants	1,530,700
Inhabitants per km ²	1,275
Gross domestic product in € million	71,022
Working population	916,300
Number of companies	84,941
Foreign HR companies	4,098
Inner-regional commuters	133,927
Available income per head in € - divergence from federal average in %	22,236 + 17



Economic strength

Düsseldorf is one of the fastest growing business locations in Germany

Growth of gross domestic product 1996 – 2010 in %



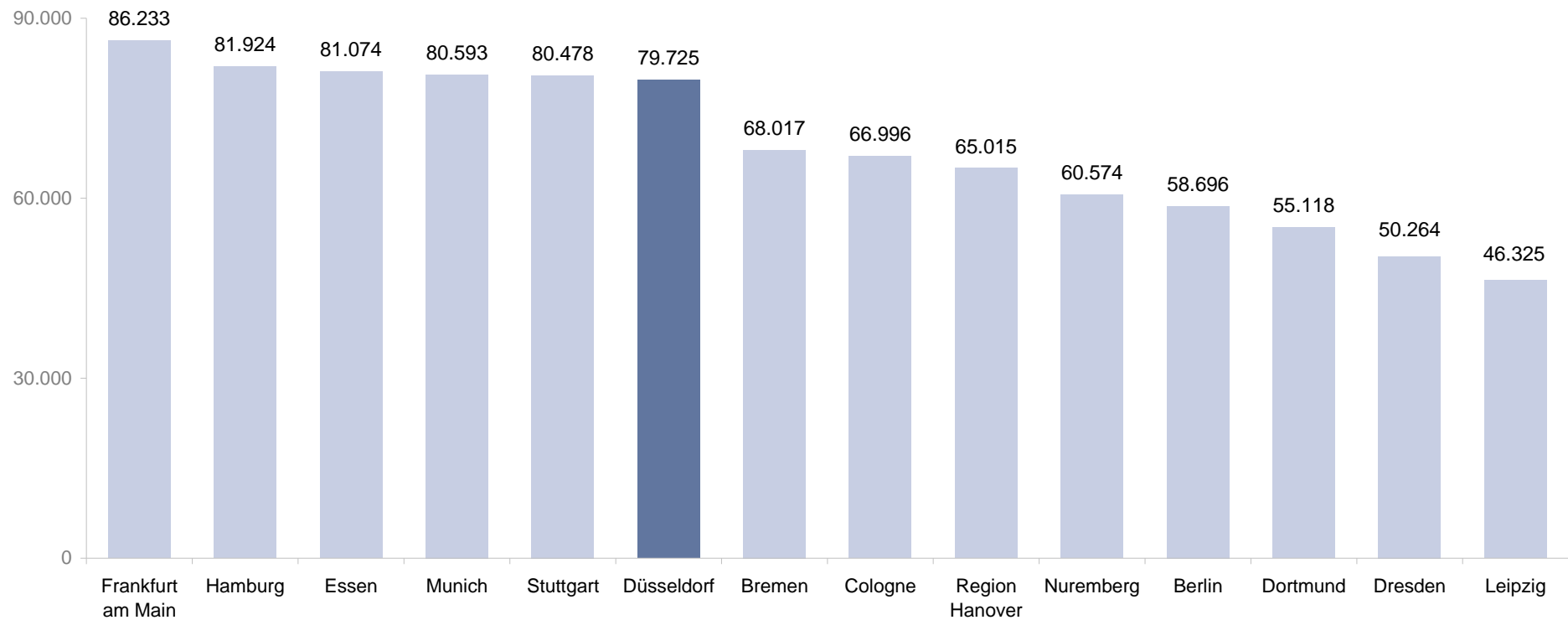
Source: Working Party National Accounts. The Gross Domestic Product 2008 to 2010 according to V2013Q1. Figures before 2008 from V2011Q3 with own conversion using ratios of overlapping years 2008 and 2009.



Economic strength

Düsseldorf – amongst the most productive cities in Germany

Gross domestic product per employed person in €



Source: Working Party National Accounts, Gross Domestic Product per employed person V2012Q3 B2010.

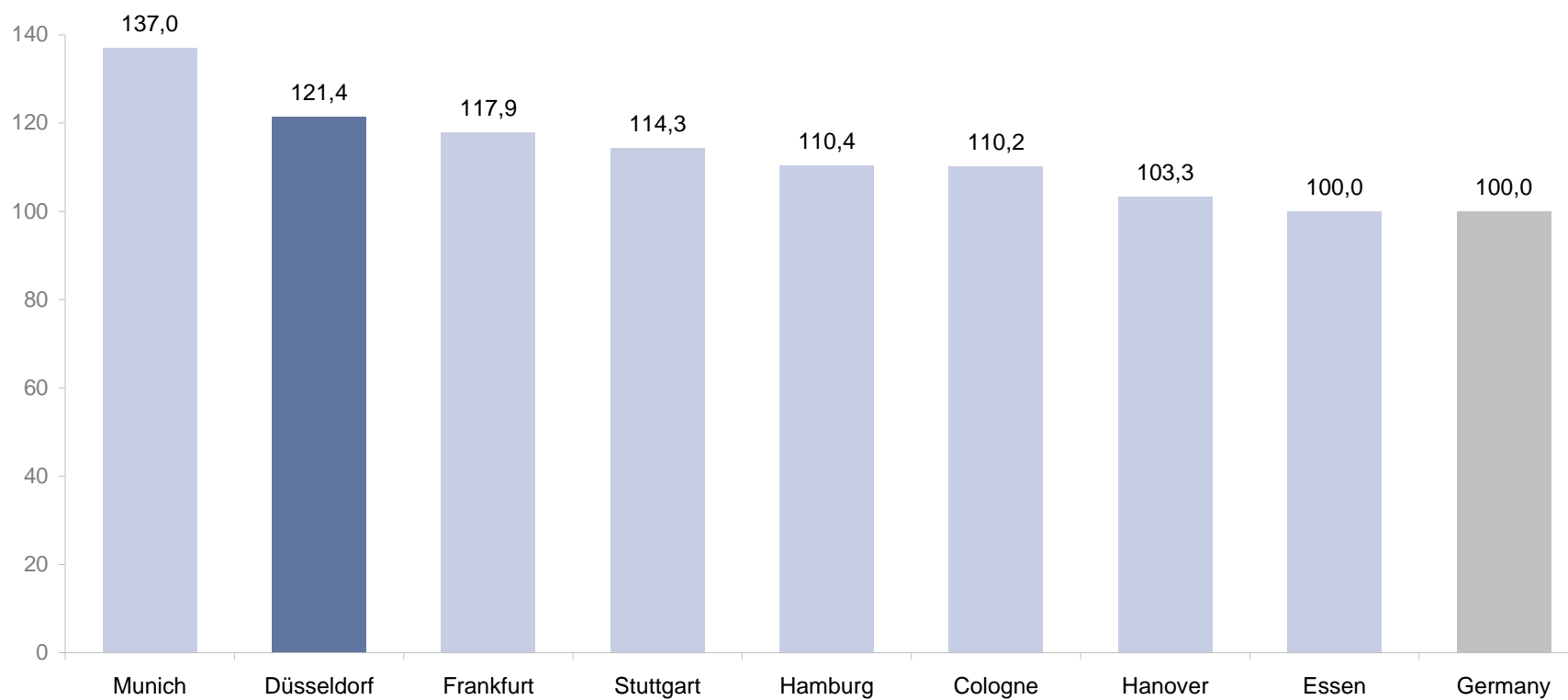


City of
Düsseldorf

Economic strength

High purchasing power of Düsseldorf's inhabitants

Key figures relating to purchasing power in selected German cities = 100



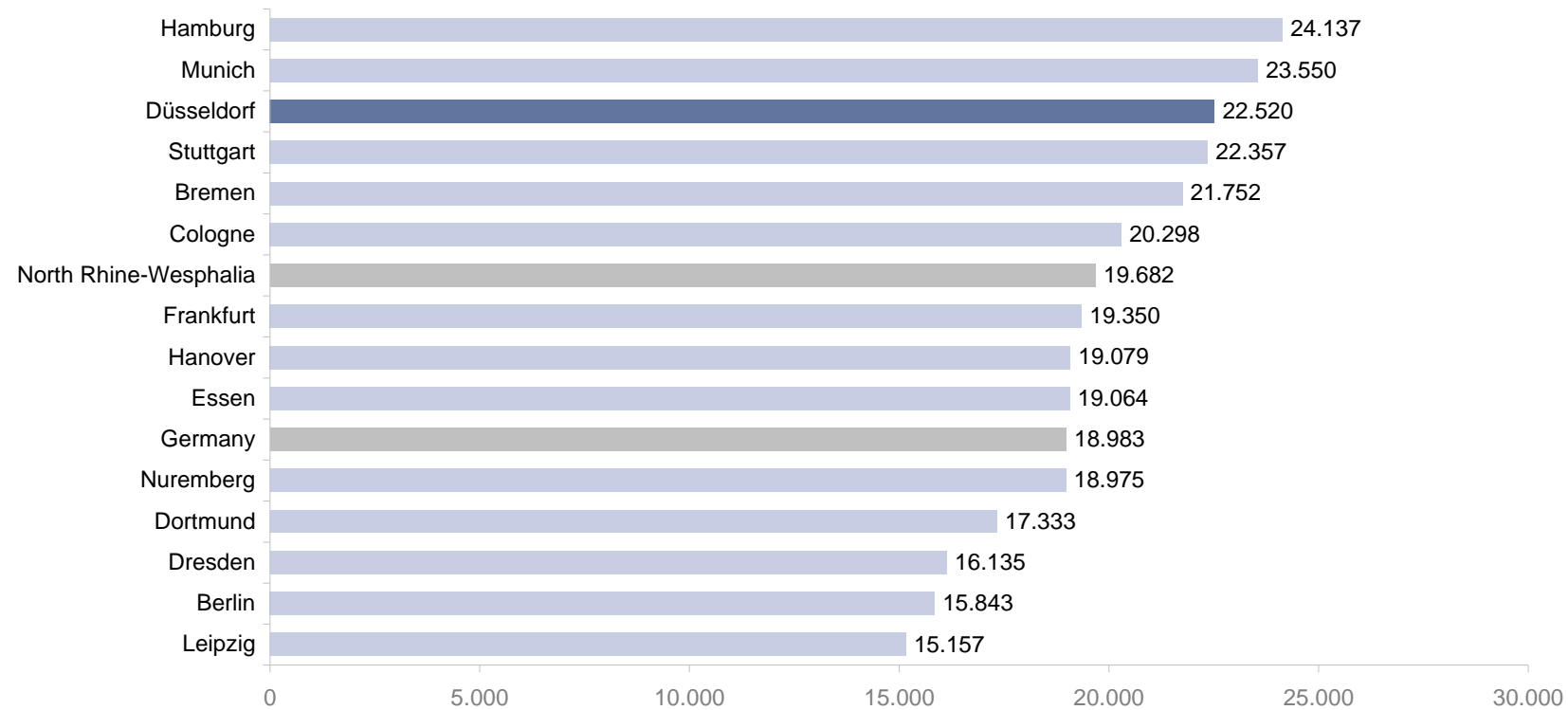
Source: GfK Nürnberg V2013Q1.



Economic strength

High available income in Düsseldorf

Available per capita income in Germany's cities in €



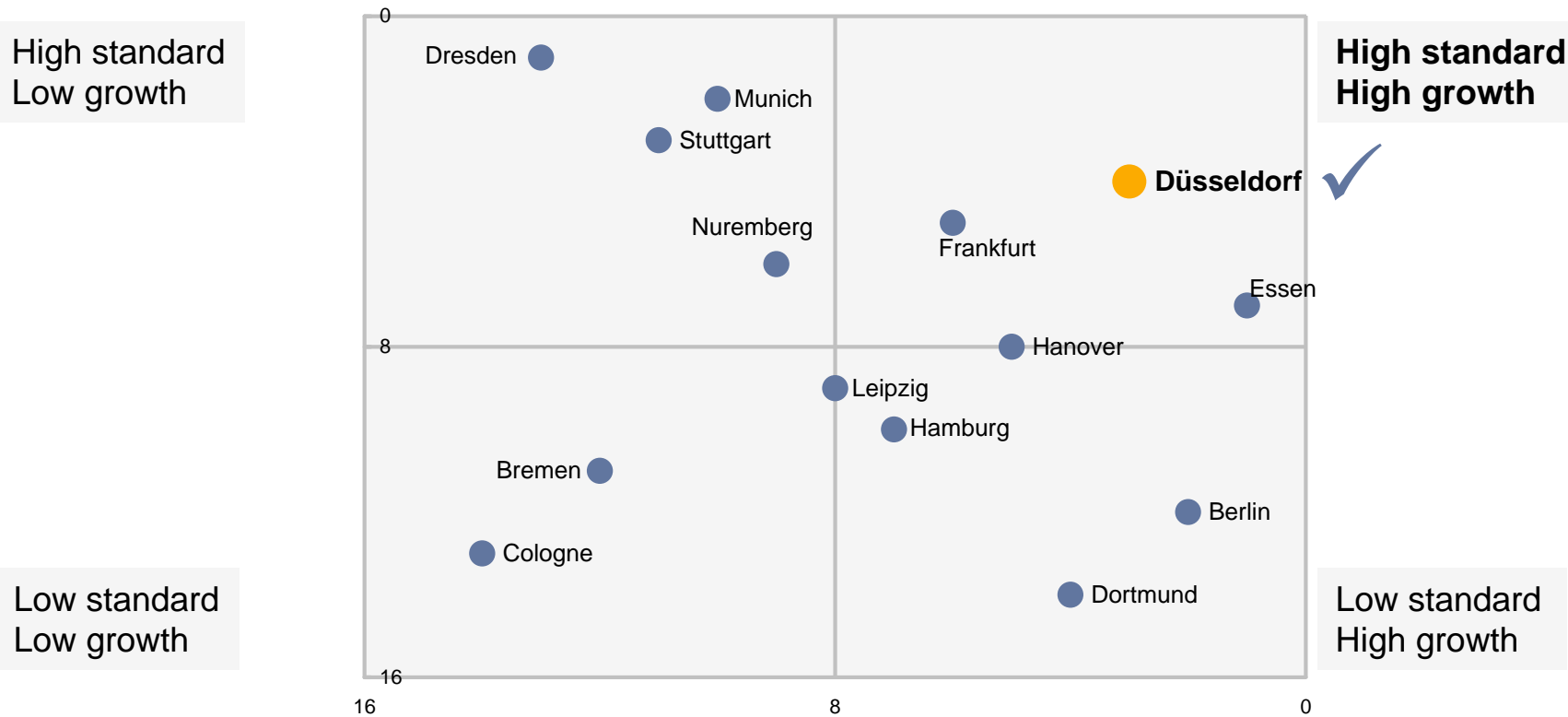
Source: Working Party National Accounts V2011Q3 B2009. Cities with more than 500,000 inhabitants.



Economic strength

Düsseldorf – ideal locational quality compared to other German cities

Standard and dynamics rankings for the category “locational quality” according to INSM-city study 2012



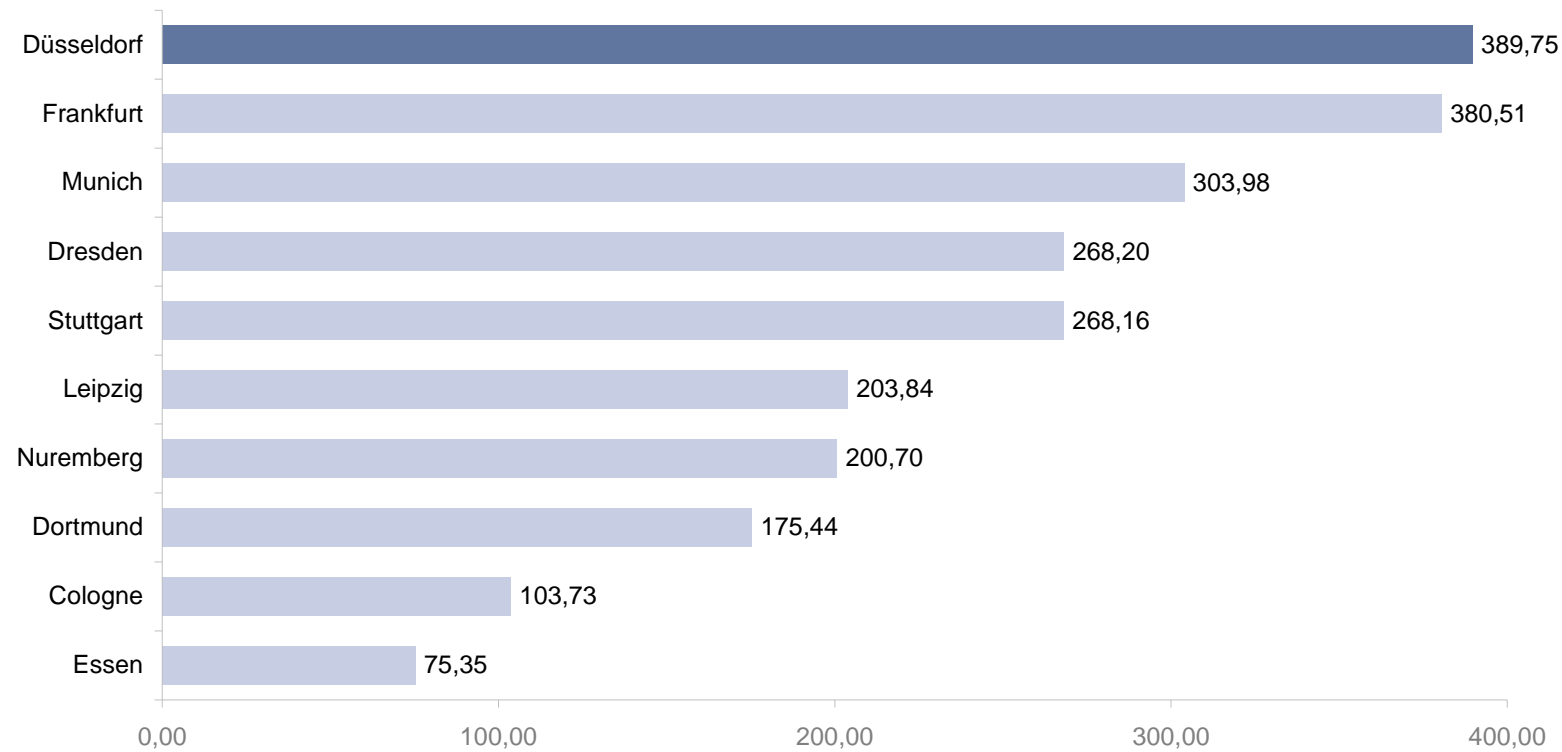
Source: INSM city study V2012Q4. Own comparison of city rankings in the areas “standard” and “dynamics” for the category “locational quality”. Selection of German cities over 500,000 inhabitants.



Economic strength

Düsseldorf's high municipal investment strength

Municipal physical investments per capita and year in €



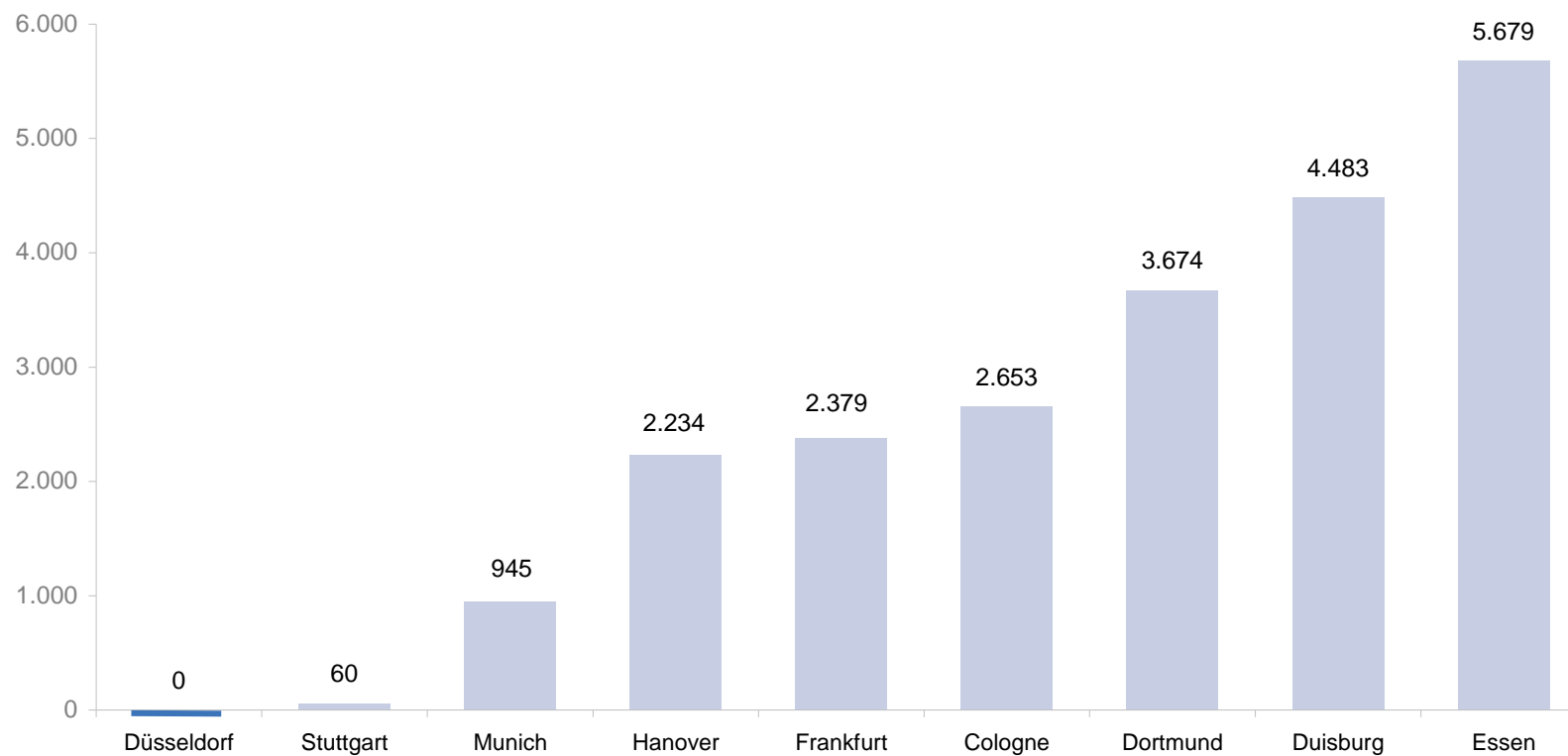
Source: State Statistical Offices V2013Q2 B2012.



Economic strength

Düsseldorf - debt-free city

Per-capita debt of selected German cities in €



Source: Düsseldorf City Treasury V2013Q1 2012Q4 Düsseldorf's debt-free status is analysed economically by comparing third-party debts with the liquidity of the holding company and city reserves.



City of
Düsseldorf

Employment location

Düsseldorf -
a highly attractive
employment
location



Employment location

Düsseldorf is one of the largest German employment locations

Employees in the German cities, North Rhine Westphalia and Germany

Area	Employees
Berlin	1.682.424
Hamburg	1.125.040
Munich, urban municipality	956.788
Cologne, urban municipality	672.564
Frankfurt am Main, urban municipality	634.855
Düsseldorf, urban municipality	490.694
Stuttgart, urban district	471.682
Hanover, state capital	383.833
Nuremberg, urban municipality	356.839
Bremen, urban municipality	338.112
Essen, urban municipality	316.203
Dresden, urban municipality	304.338
Dortmund, urban municipality	304.152
Leipzig, urban municipality	297.745
North Rhine-Westphalia	8.688.884
Germany	40.553.000

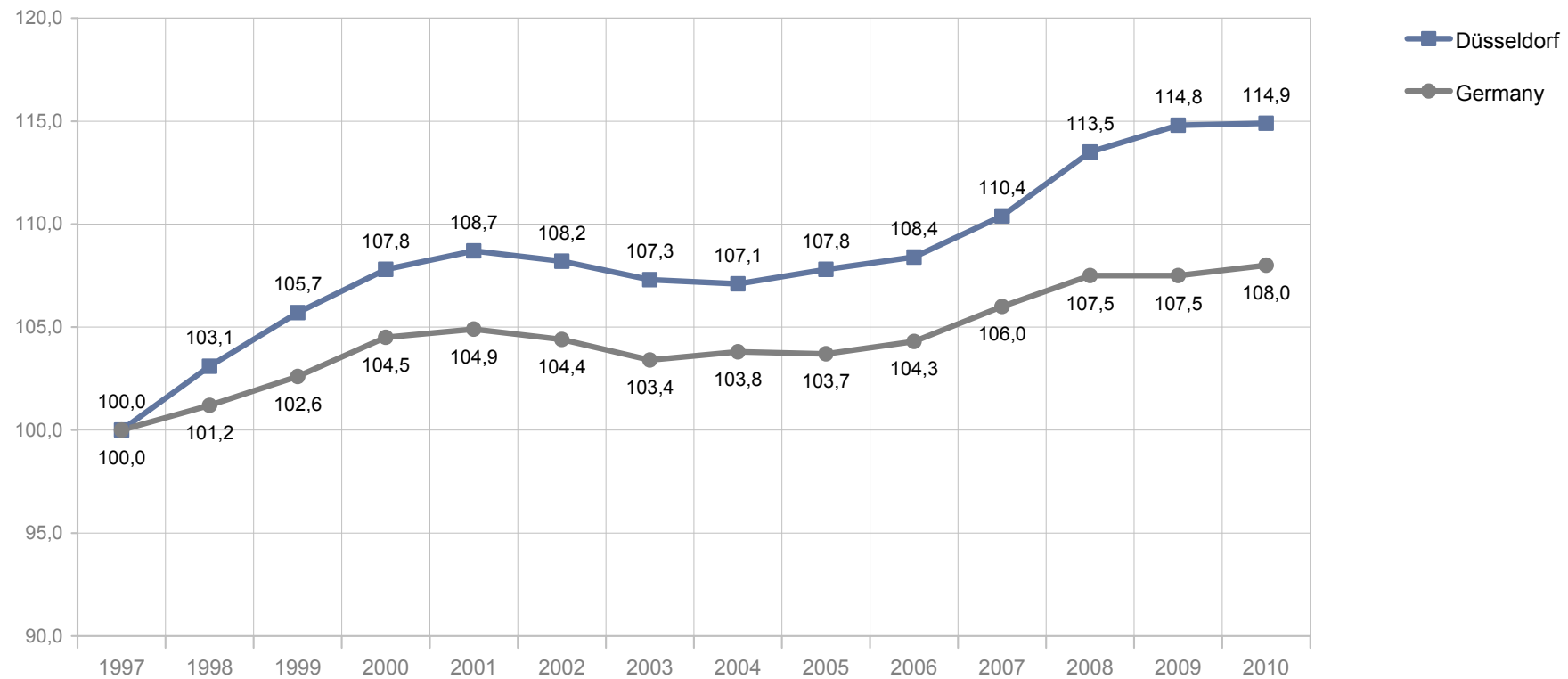
Source: Working Group Official Employment Statistics V2012Q3 B2010. Cities with more than 500,000 inhabitants.



Employment location

Above-average growth in number of employees in Düsseldorf for over a decade

Percentage change in number of employees in Düsseldorf and in Germany 1991 - 2010



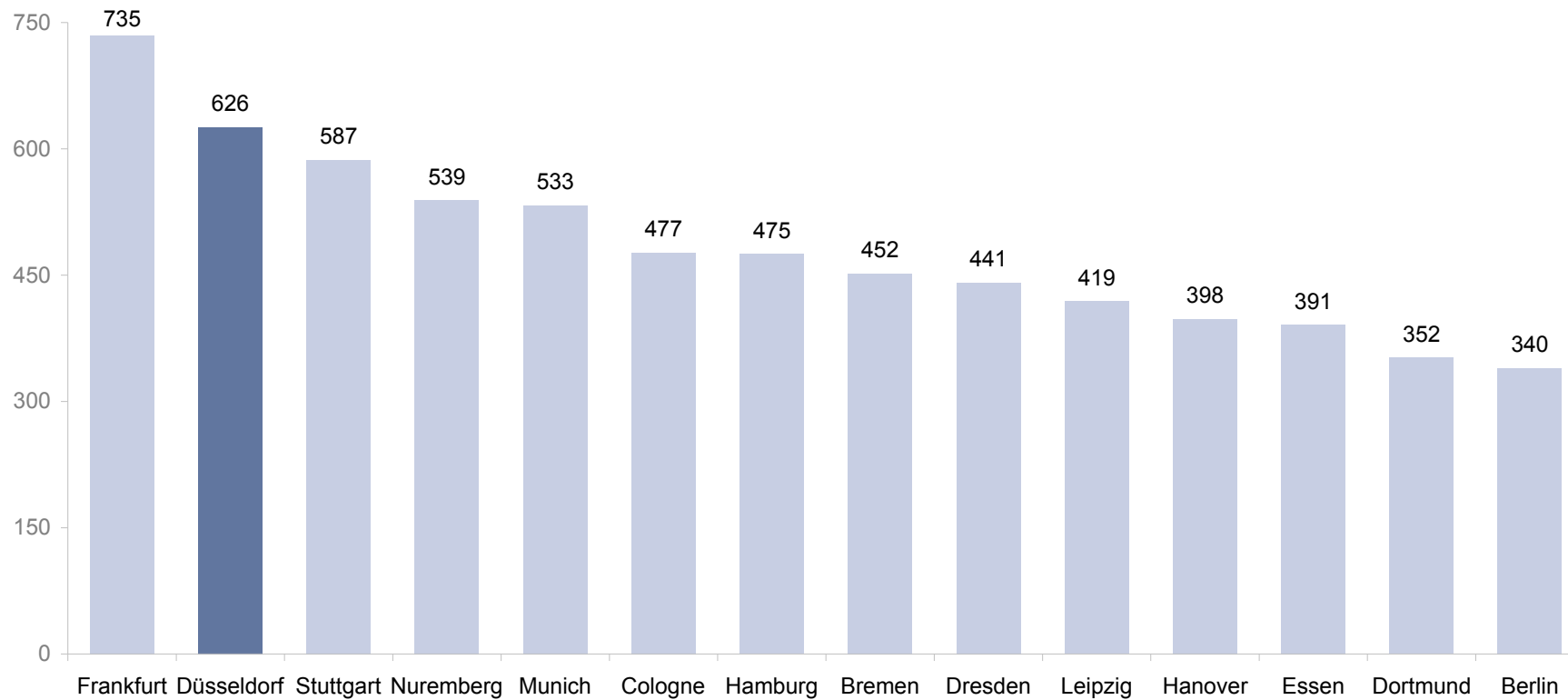
Source: Working Group Official Employment Statistics . Employees 2008 to 2010 according to V2012Q4. Values before 2008 from V2011Q3 with own conversion using the ratio of the overlapping years 2008 and 2009.



Employment location

Very high job density in the location Düsseldorf

Employees liable to pay social security contributions per 1,000 inhabitants



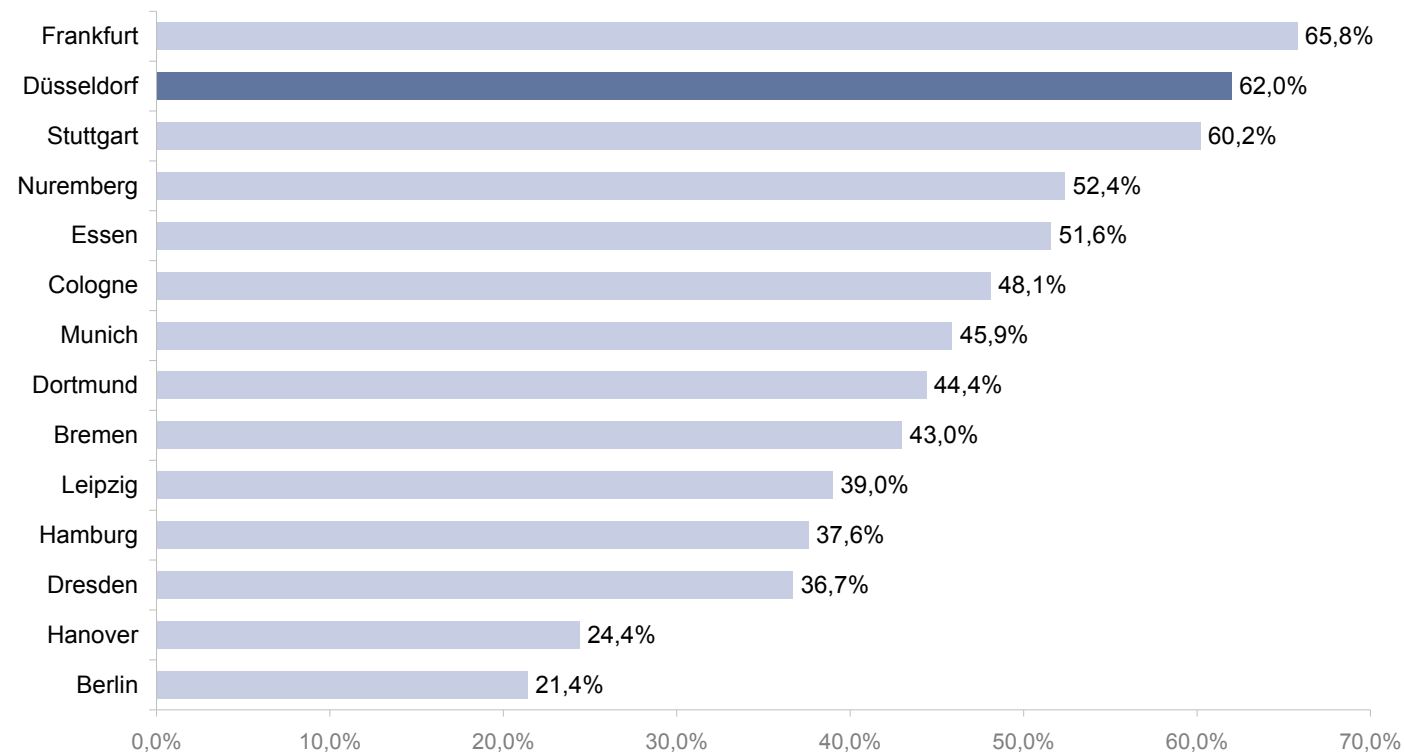
Sources: Federal Employment Agency, employees liable to pay social security contributions V2013Q1 B2012Q2. Federal Statistics Office, Numbers of inhabitants V2012Q4 B2011Q4.



Employment location

Düsseldorf – High number of commuters due to high appeal for working population

Proportion of commuters of all employees liable to pay social security contributions %



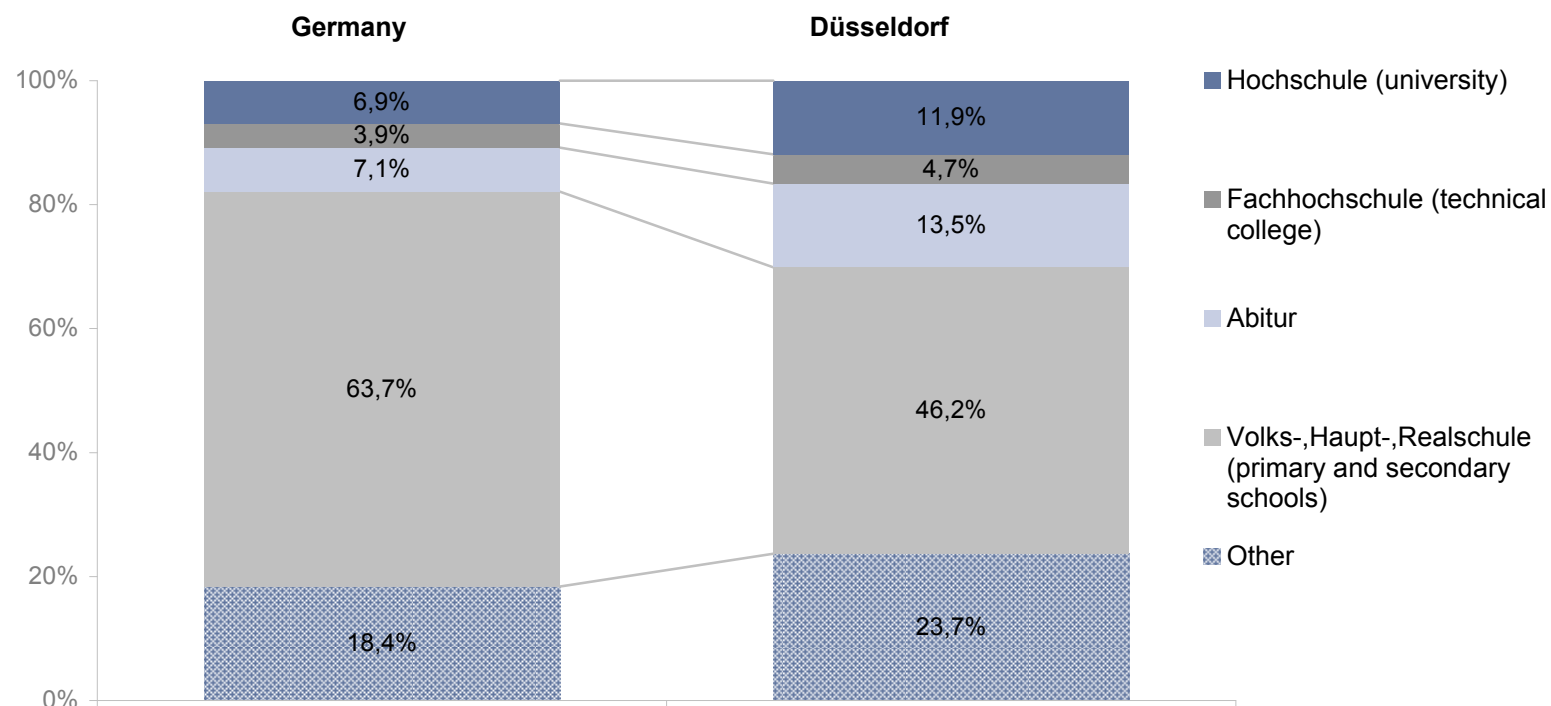
Source: Federal Employment Agency, commuter statistics of employees liable to pay social security contributions V2013Q1 B2012Q2.



Employment location

Employees with above-average qualifications work in Düsseldorf

School-leaving qualifications of employees liable to pay social security contributions in Düsseldorf as compared with Germany as a whole



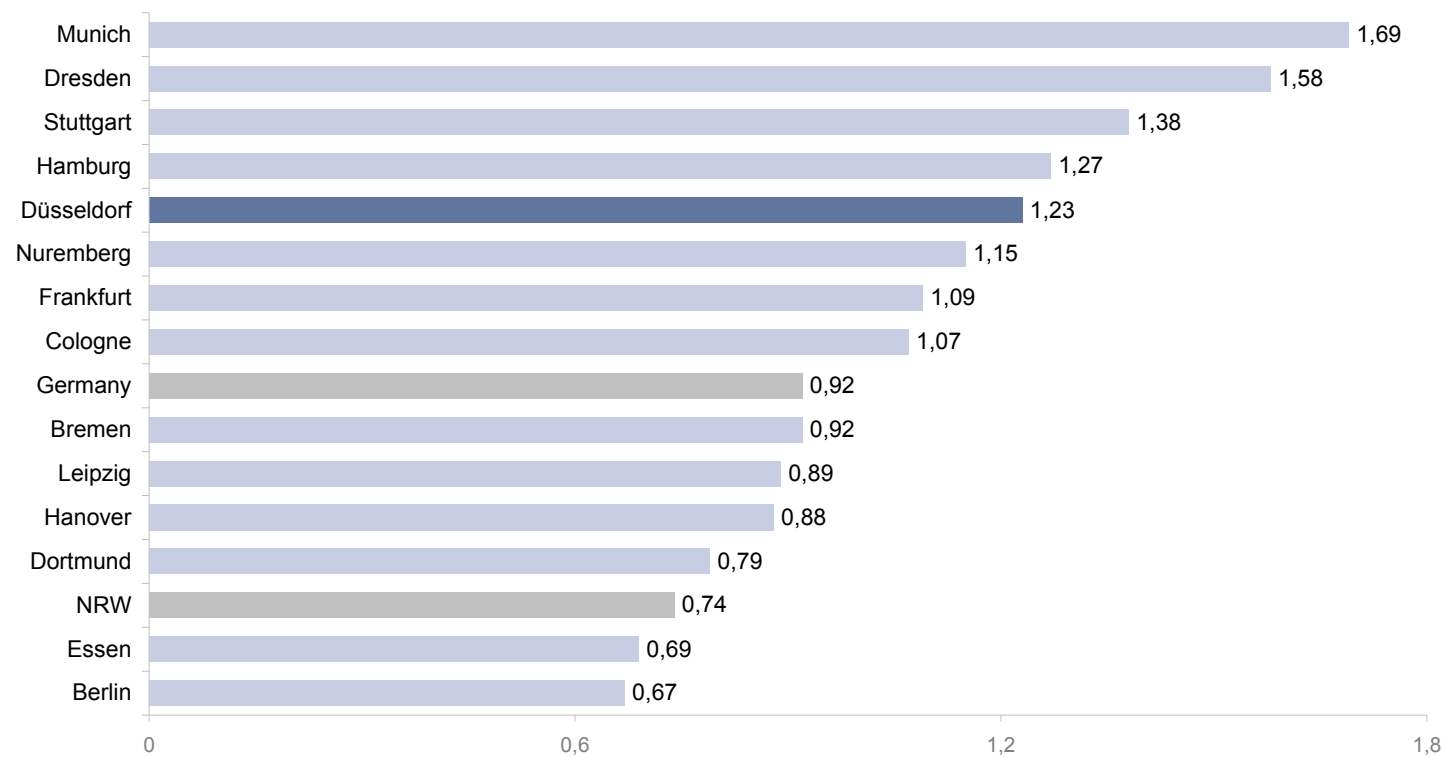
Source: Federal Employment Agency, employment statistics V2012Q1 B2011Q2.



Employment location

Düsseldorf offers a disproportionately high number of apprenticeship places

Apprenticeships offered per applicant in apprenticeship year 2011/2012 (October to end September)



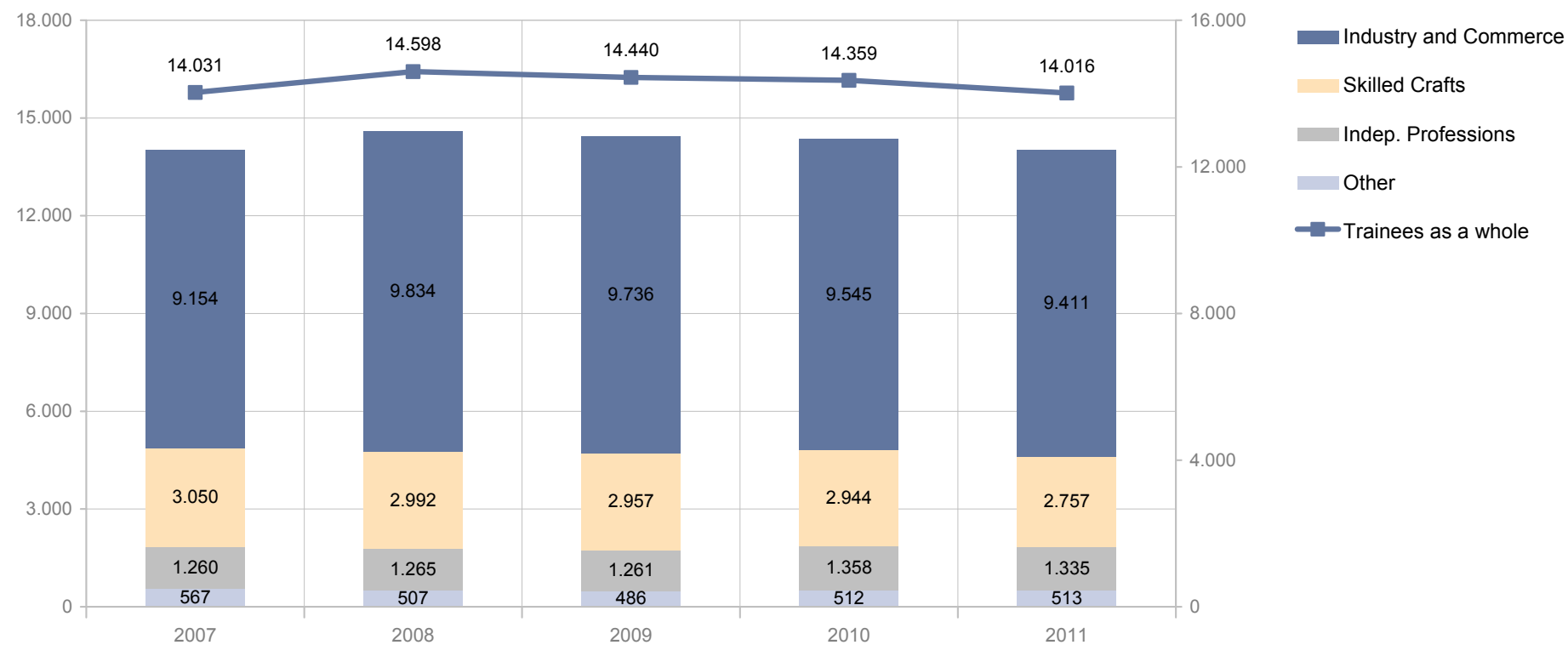
Source: Federal Employment Agency, Trainee Statistics, accumulated places and applicants V2012Q4 B2011/2012.



Employment location

Promising apprenticeship training places in Düsseldorf for the whole economy

Number of apprentices/trainees on cut-off date 31.12. according to training area



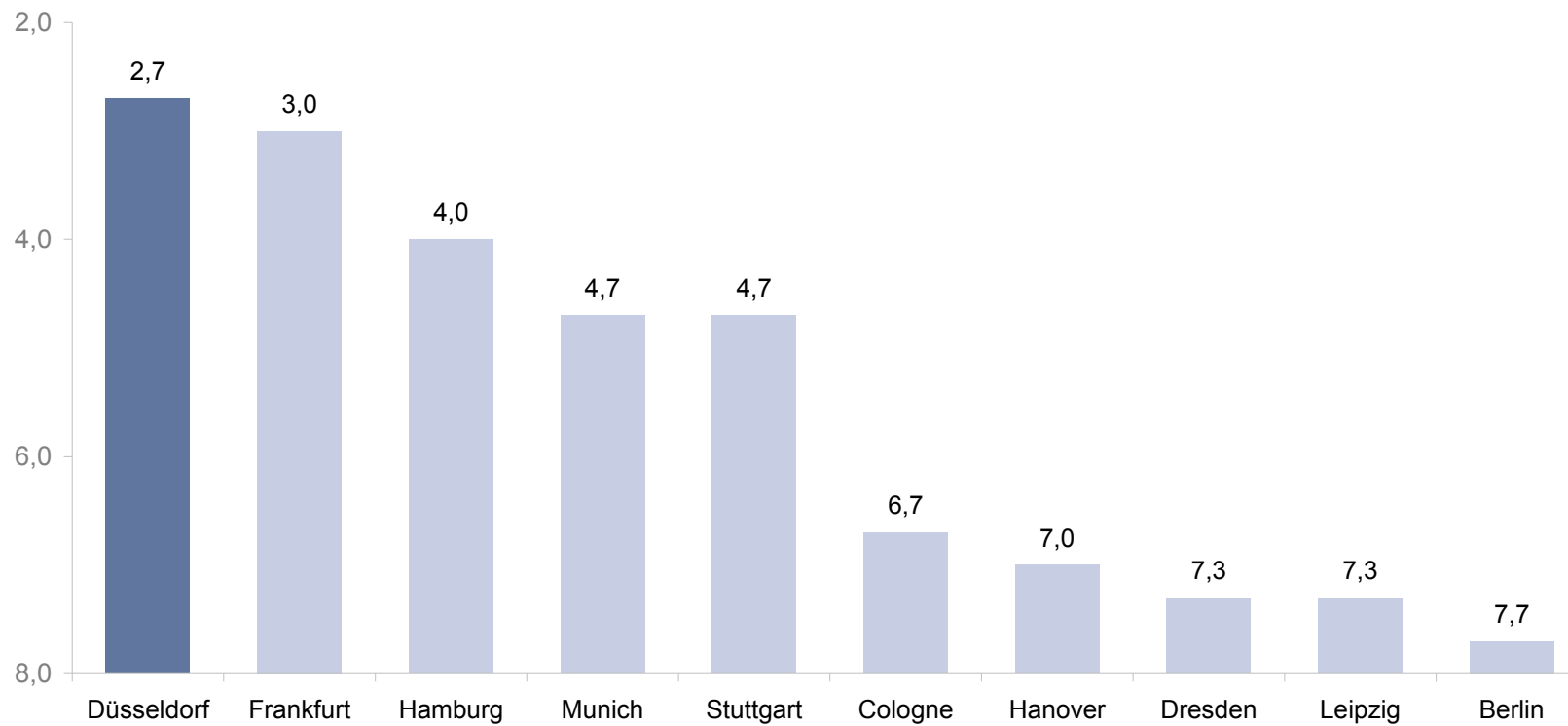
Source: IT NRW, Vocational training statistics V2012Q2.



Employment location

Top marks for Düsseldorf as an employment location

Marking index on job quality of German cities (from 1 to 10)



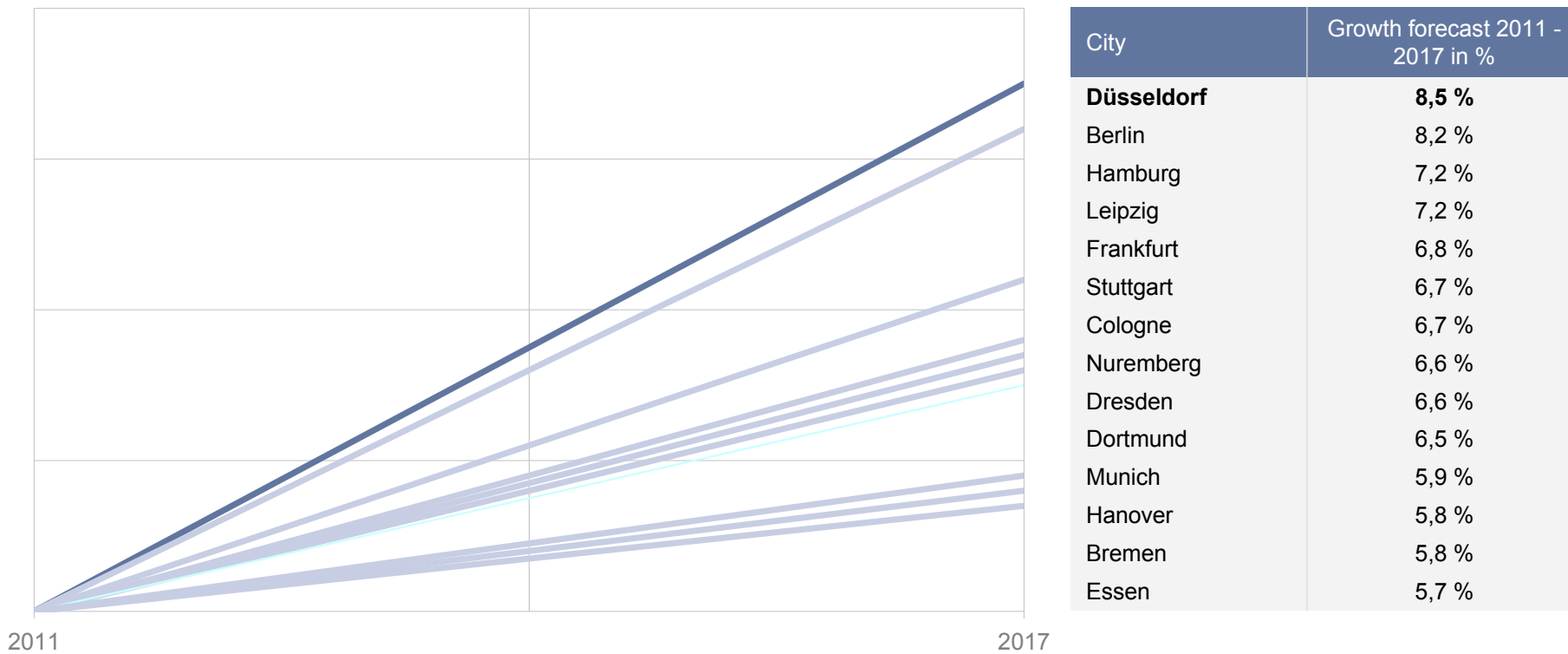
Source: Bellevue-Studie V2011Q3. Category "Employment position" in annual city test. Marks awarded between 1 (= top) und 10 (= flop).



Employment location

Düsseldorf – the employment location of the future

Job growth forecast issued by Feri-Institut for 2011 – 2017. Here, a selection of German cities with over 500.000 inhabitants.



Source: Feri-Institut, CAPITAL 09/11 V2011Q3. Own presentation for result of the category "Jobs".



City of
Düsseldorf

International character

Düsseldorf -
international
location

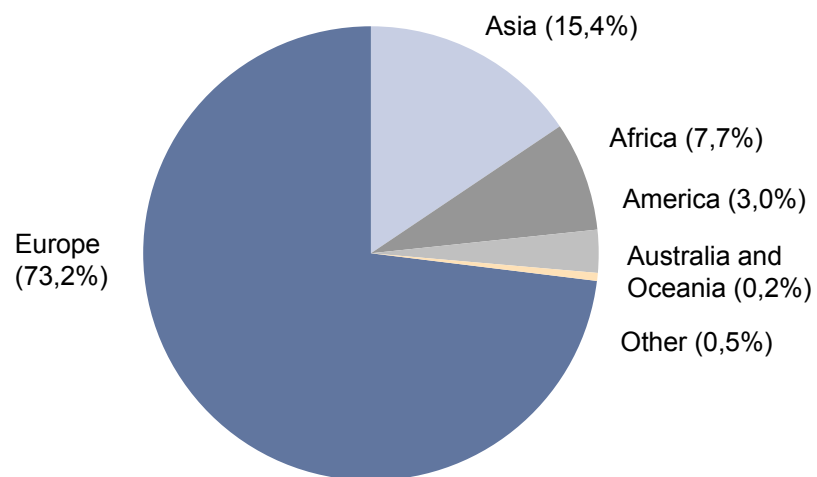


International character

People from all continents live in Düsseldorf

Foreign inhabitants in Düsseldorf according to continents

Total: 113.328



Source: Düsseldorf Office of Statistics, Residents' Register of City of Düsseldorf, V2012Q3 B2011Q4.



International character

People of many nations enjoy living in Düsseldorf

Foreign inhabitants in Düsseldorf according to most common countries of origin

Total: 113.328

Country of origin	Inhabitants abs.	Inhabitants in %	Country of origin	Inhabitants abs.	Inhabitants in %
Europe	82.940	73,2%	Asia	17.487	15,4%
Turkey	14.010	12,4%	Japan	5.040	4,4%
Greece	9.437	8,3%	China, People's Republic	2.453	2,2%
Poland	7.294	6,4%	Iran	1.565	1,4%
Serbia and Montenegro	6.550	5,8%	India	1.301	1,1%
Italy	6.511	5,7%	Korea, Republic	1.184	1,0%
Russian Federation	3.821	3,4%	Iraq	1.005	0,9%
Macedonia	3.585	3,2%	Thailand	541	0,5%
Croatia	3.249	2,9%	Vietnam	496	0,4%
Ukraine	3.230	2,9%	Georgia	393	0,3%
Spain	2.998	2,6%	Africa	8.739	7,7%
France	2.962	2,6%	America	3.430	3,0%
Great Britain	2.515	2,2%	United States	1.601	1,4%
Netherlands	2.372	2,1%	Brazil	555	0,5%
Romania	2.256	2,0%	Canada	281	0,2%
Austria	1.860	1,6%	Australia/Oceania	221	0,2%
Bosnia and Herzegovina	1.846	1,6%			
Portugal	1.475	1,3%			
Bulgaria	1.148	1,0%			

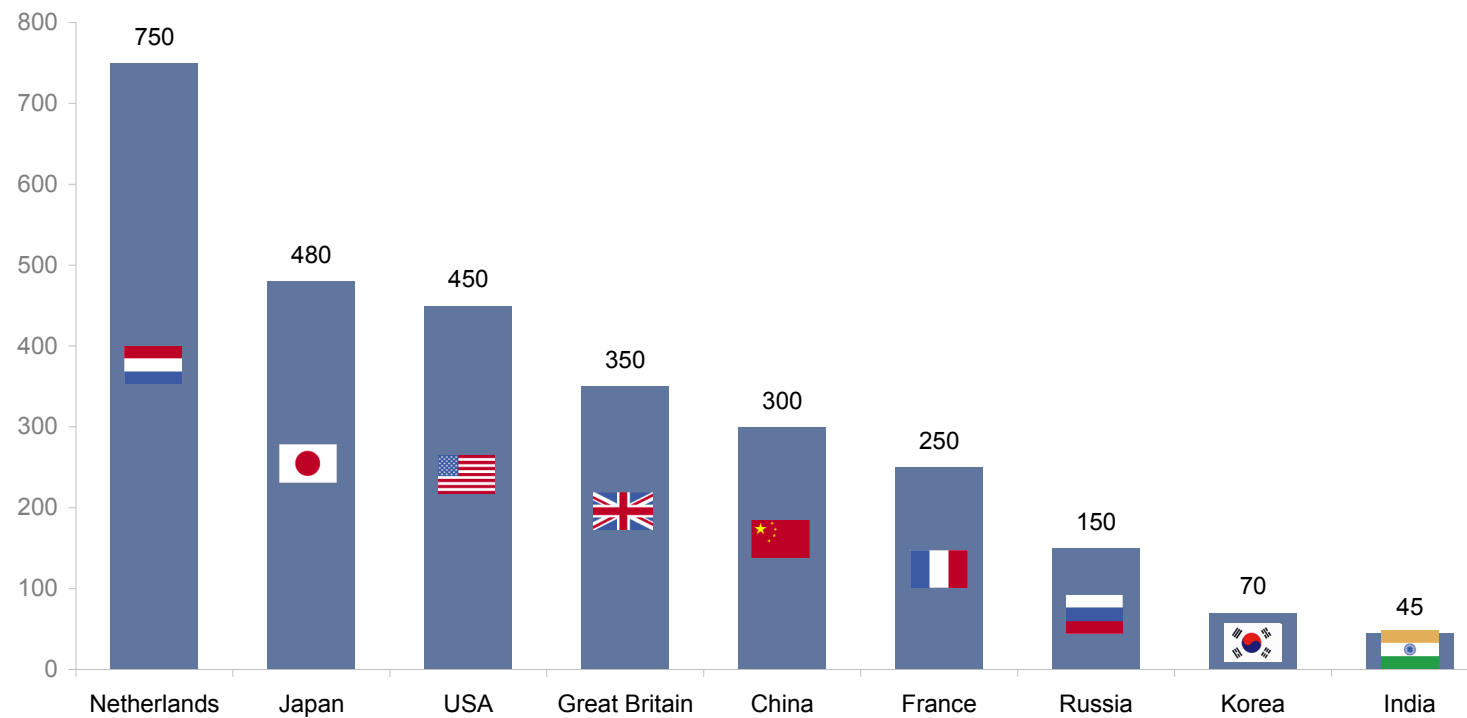
Source: Düsseldorf Office of Statistics, Residents' Register of City of Düsseldorf V2012Q3 B2011Q4.



International character

Foreign investments from all continents in Düsseldorf

Presence of foreign companies in Düsseldorf region, examples of countries



Sources: Business Development Düsseldorf, IHK Düsseldorf, IHK Krefeld, NRW Invest V2011Q2.



International character

International companies with a foothold in Düsseldorf

Foreign headquarters in Düsseldorf (examples)	Country of origin
BBDO Germany, advertising	USA
E-Plus, telecommunications	The Netherlands
Ericsson, telecommunications	Sweden
FUJIFILM Europe	Japan
HSBC, finance	Great Britain
Huawei, telecommunications	China
L'Oreal, cosmetics	France
McKinsey & Company, consultancy	USA
Nanya Technology Europe, IT	Taiwan

Foreign headquarters in Düsseldorf (examples)	Country of origin
Nokia Siemens Networks, IT	Finland
ORACLE Deutschland, IT	USA
Posco Europe Office, steel	Korea
Statkraft Germany, energy	Norway
TATA Steel, steel	India
The Bank of Tokyo-Mitsubishi, UFJ	Japan
Toshiba Electronics	Japan
Vodafone Group, telecomm.	Great Britain
ZTE, telecommunications	China

Source: Business Development Düsseldorf V2013Q3



International character

40 consulates present in Düsseldorf

including:

France
Great Britain
Japan
Canada
The Netherlands
Czech Republic
Turkey
USA

33 foreign chambers of commerce and foreign trade organisations

including:

China
France
Great Britain
India
Japan
The Netherlands
Russia
Turkey



International character

International Schools

International school forms in Düsseldorf

- International School of Düsseldorf with 1,000 pupils from 50 countries
- International Japanese School Düsseldorf
- Lycée Français de Düsseldorf
- Several Chinese language schools with additional lessons from native speakers
- Russian Education Centre
- Full Greek school system
- 4 German grammar schools (Gymnasien) have bilingual courses
- Several international kindergartens

International Clubs

International clubs in Düsseldorf

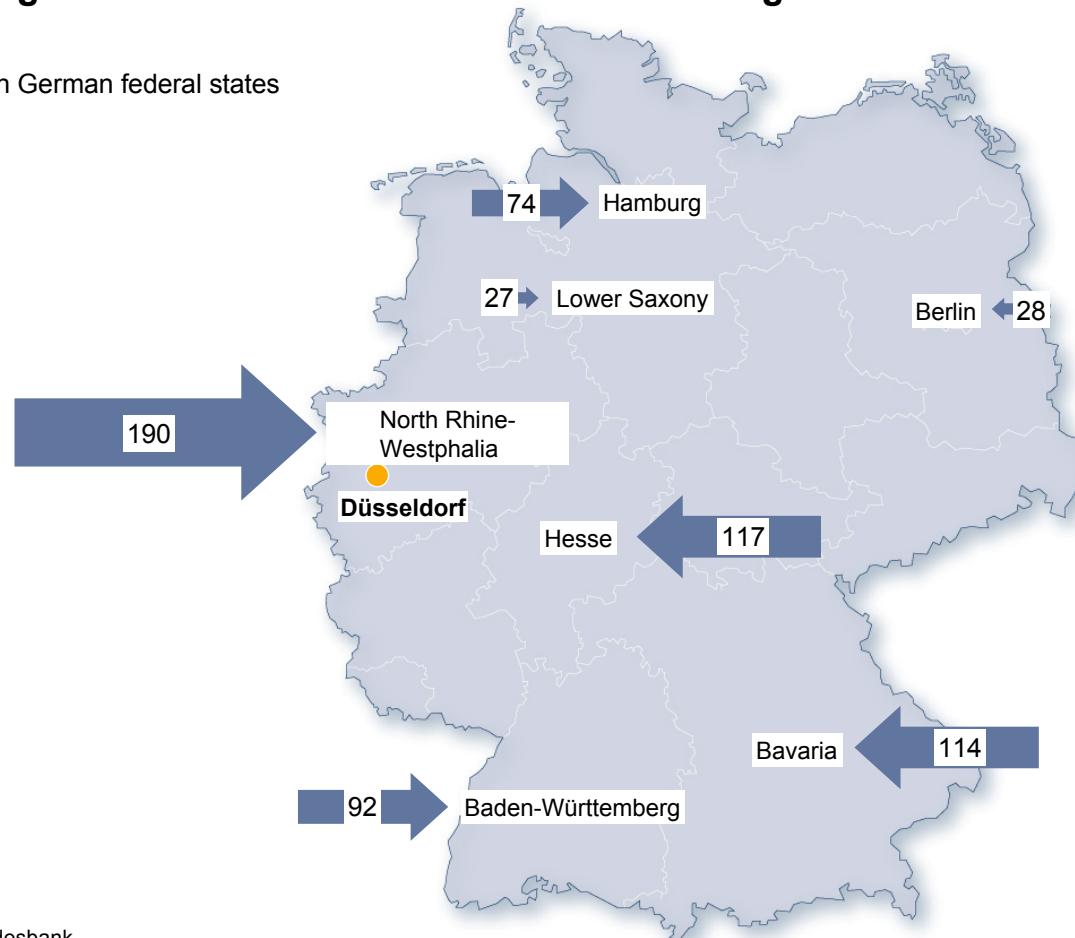
- Business Club Düsseldorf
- China Enterprises Association CEA
- Düsseldorf China Club
- German & Czech Business Club
- Industry Club Düsseldorf
- Japanese Club Düsseldorf
- Lions Club
- Marketing Club
- Rotary Club
- Business Club Russia



International character

Düsseldorf region – most attractive area for direct foreign investment in Germany

Direct investment in German federal states
in € billion



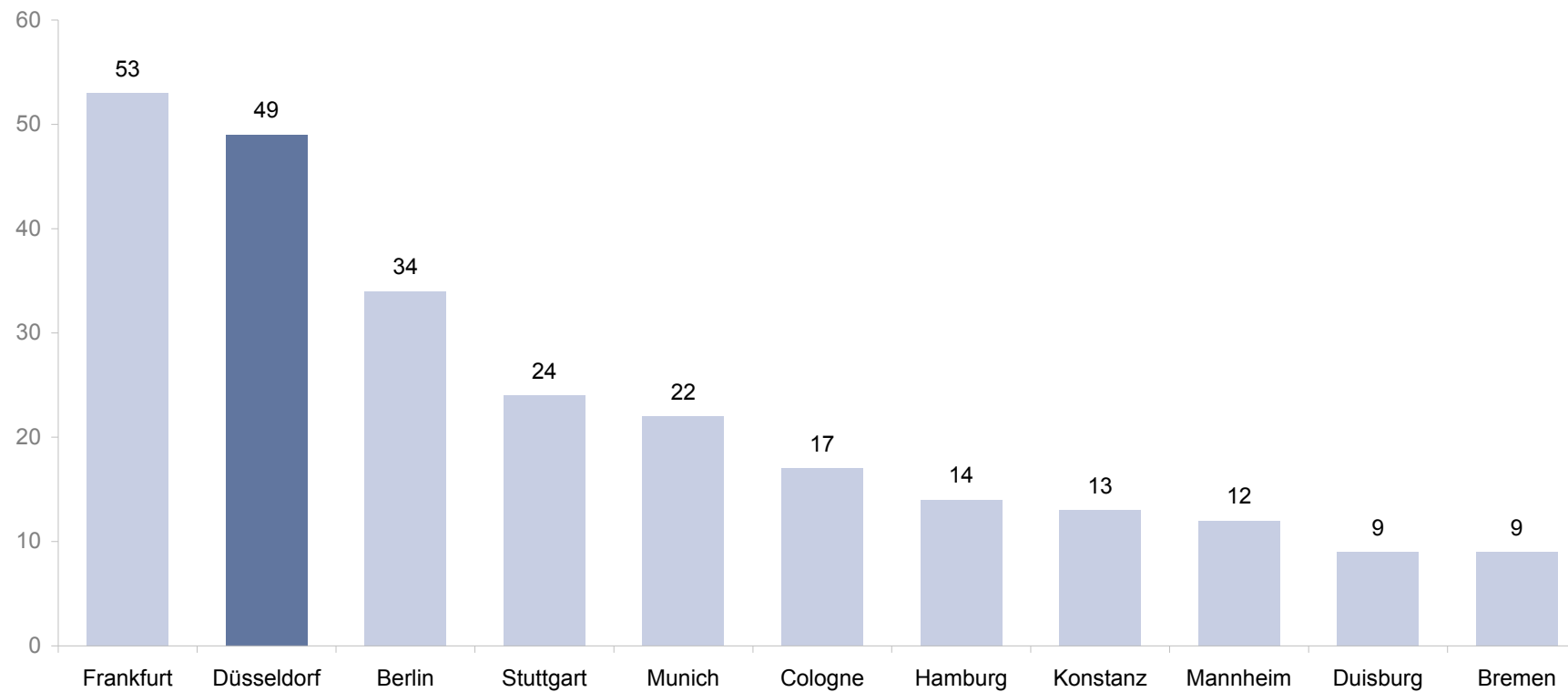
Source: Deutsche Bundesbank,
Direct foreign investments in Germany according to federal states V2012Q2 B2010, preliminary results.



International character

Düsseldorf ranks high as recipient of foreign investment projects

Number of foreign investments that created businesses and/or new jobs in 2012.



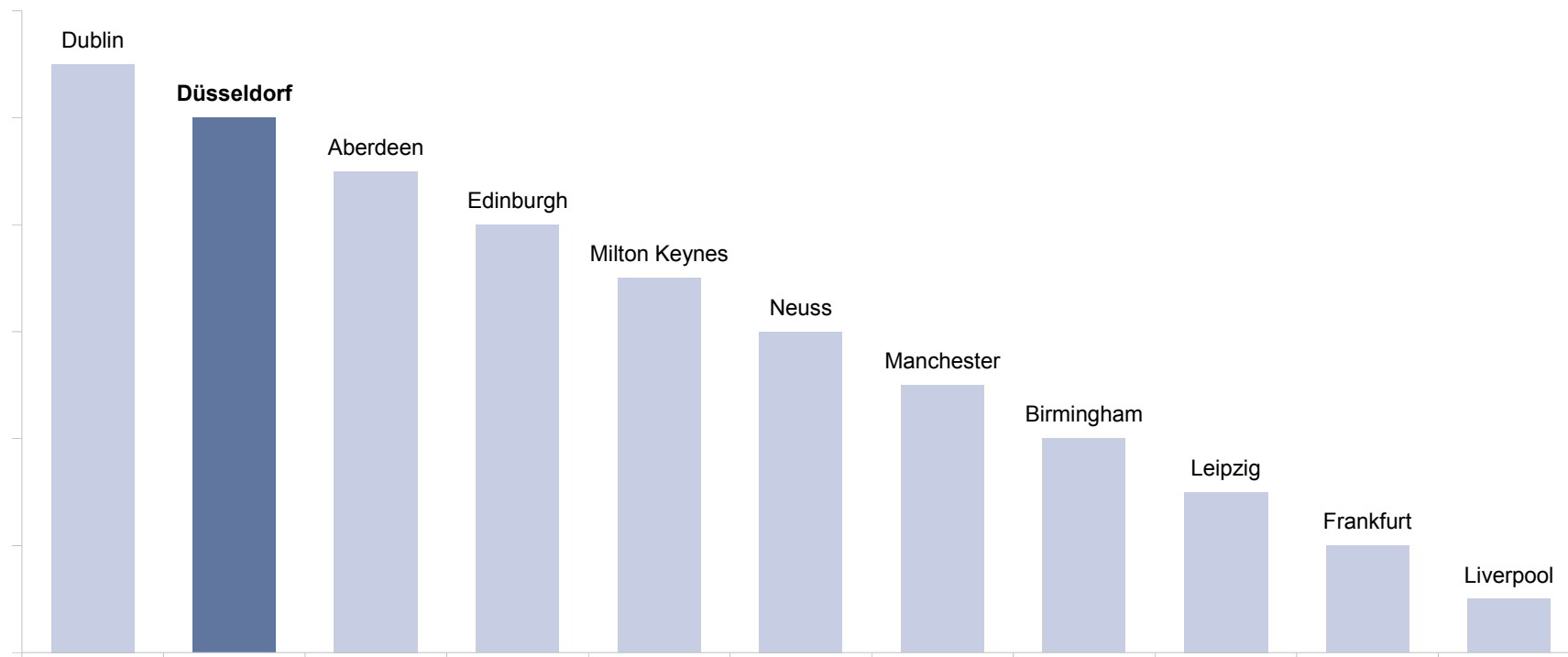
Source: Ernst & Young, European Investment Monitor, Direct investments to Germany V2013Q2 B2012.



International character

Düsseldorf ranks high amongst European cities as recipient of foreign investment projects

European city ranking showing increase in foreign direct investment projects from Oct. 2008 – Oct. 2010



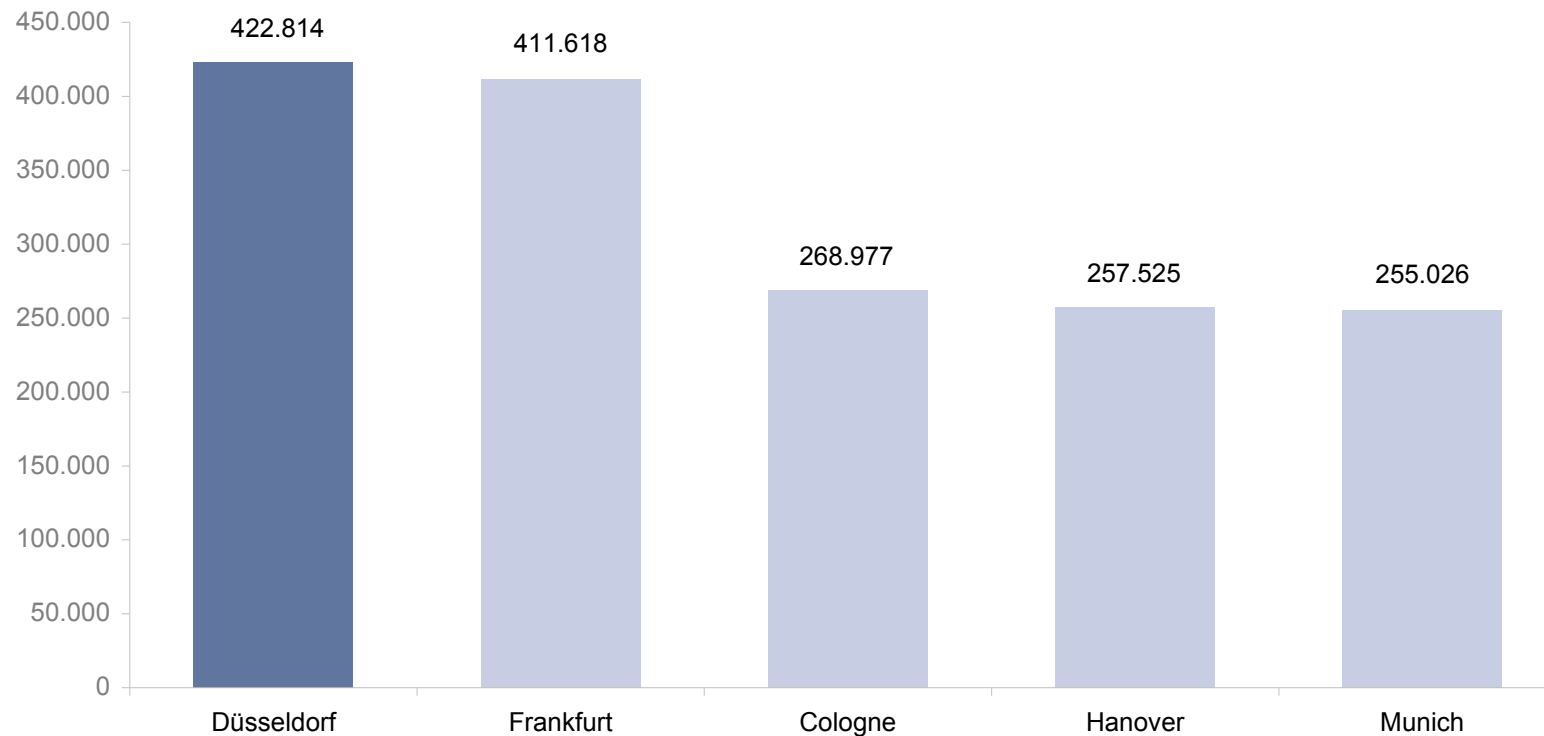
Source: fDi Markets V2011Q2



International character

Düsseldorf – highest appeal for trade fair visitors from abroad

Average number of foreign trade fair visitors for the period 2008 – 2012



Source: AUMA V2013Q3.



City of
Düsseldorf

Company strength

Düsseldorf -
strong company
location



Company strength

Powerful company presence in Düsseldorf

Company register source	Number in Düsseldorf	International companies in Düsseldorf (examples)
<ul style="list-style-type: none"> • Active businesses acc. to VC* 	51.558	E.ON AG, energy
<ul style="list-style-type: none"> • Number of companies acc. to business register: 	39.886	Metro AG, retail/wholesale
<ul style="list-style-type: none"> • Companies subject to VAT: 	32.215	Henkel AG & Co. KGaA, chemicals
<ul style="list-style-type: none"> • Registered companies in Companies' Register 		Vodafone D2 GmbH, telecommunications
<ul style="list-style-type: none"> <ul style="list-style-type: none"> – Section B: 	22.361	C & A Mode KG, fashion
<ul style="list-style-type: none"> <ul style="list-style-type: none"> <ul style="list-style-type: none"> – of which GmbHs: 	21.365	Rheinmetall AG, machines, systems
<ul style="list-style-type: none"> <ul style="list-style-type: none"> <ul style="list-style-type: none"> – Section A: 	6.805	E-Plus Mobilfunk GmbH & Co. KG
<ul style="list-style-type: none"> <ul style="list-style-type: none"> – in Register of Associations 	5.769	Demag Cranes AG, crane systems
<ul style="list-style-type: none"> • Business premises with employees liable to pay social security contributions: 	20.420	Daimler AG, Werk Düsseldorf, automotive

Source: * VC=Verein Creditreform V2011. Federal Statistics Office, Company Register V2011. ITNRW, VAT statistics V2012Q3. District Court Düsseldorf V2011. Federal Employment Agency, Employee statistics V2012Q1. Business Development Düsseldorf, Monitoring V2012Q3.



Company strength

Companies with the highest turnover in Düsseldorf

The largest companies in Düsseldorf according to company turnover in € million

Companies in Düsseldorf	Turnover in € million	Top 500 – ranking
E.on SE	132.093	2
Metro AG	66.739	8
Henkel AG & Co. KGaA	16.510	45
Vodafone D2 GmbH	9.641	87
Droege International Group AG	7.400	101
Gea Group AG	5.720	119
Rheinmetall AG	4.704	141
Salzgitter Mannesmann Handel-Gruppe	4.254	156
E-Plus Mobilfunk GmbH & Co. KG	3.404	187
SMS Group	3.237	195
Unternehmen in Düsseldorf	2.660	246
C & A Mode & Co.	2.635	249
Electronic Partner GmbH	2.114	307
Air Liquide Deutschland GmbH	2.000	318
Stadtwerke Düsseldorf AG	1.843	339
Adecco Germany Holding GmbH	1.551	391
Peek & Cloppenburg KG	1.359	421
Gerresheimer AG	1.219	447
Mitsui & Co. Deutschland GmbH	1.135	468
Demag Cranes AG	1.123	474
L' Oréal Deutschland GmbH	1.070	488

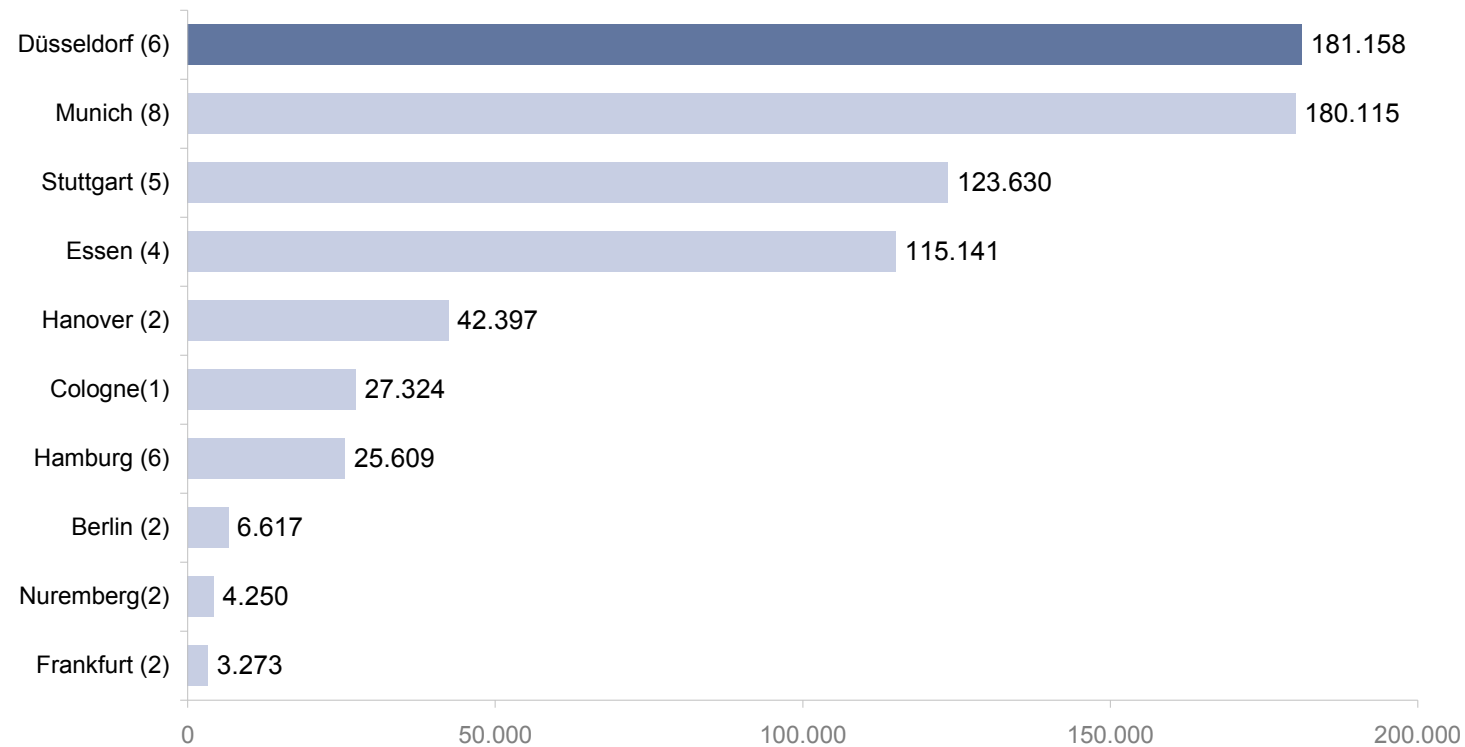
Source: Die Welt V2013Q3 B2012. The company Metro Cash&Carry listed in Die Welt is not listed here as its turnover is included in that of Metro AG. Demag Cranes AG is now called Terex Material Handling & Port Solutions.



Company strength

Düsseldorf ranks top of German corporate cities

Annual turnover of the largest quoted corporate groups in each city in € million



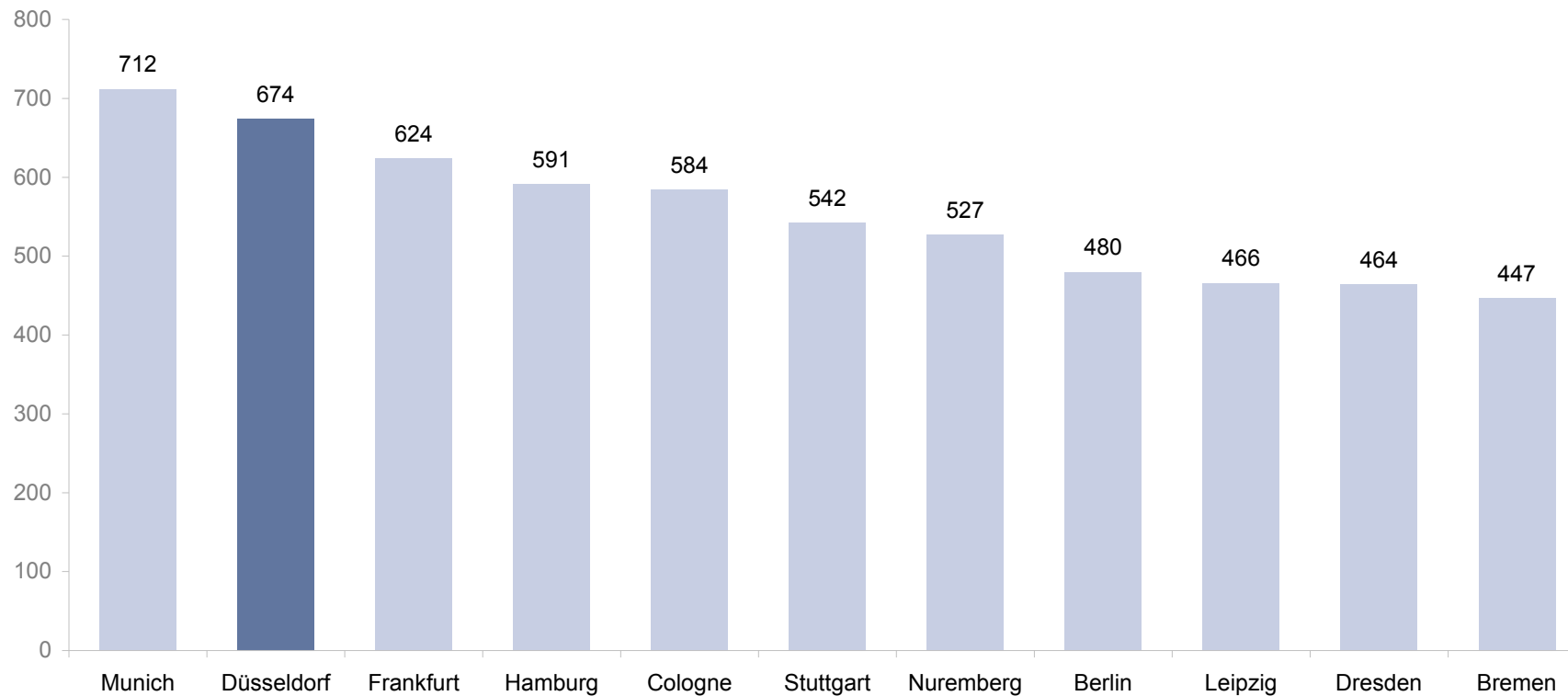
Source: Handelsblatt V2011Q2. Banks and insurance companies are not taken into account in the publication. Business Development Düsseldorf, city evaluation. Figures in brackets = number of companies taken into account.



Company strength

Very high company density in Düsseldorf

Active companies per 10,000 inhabitants in city comparison



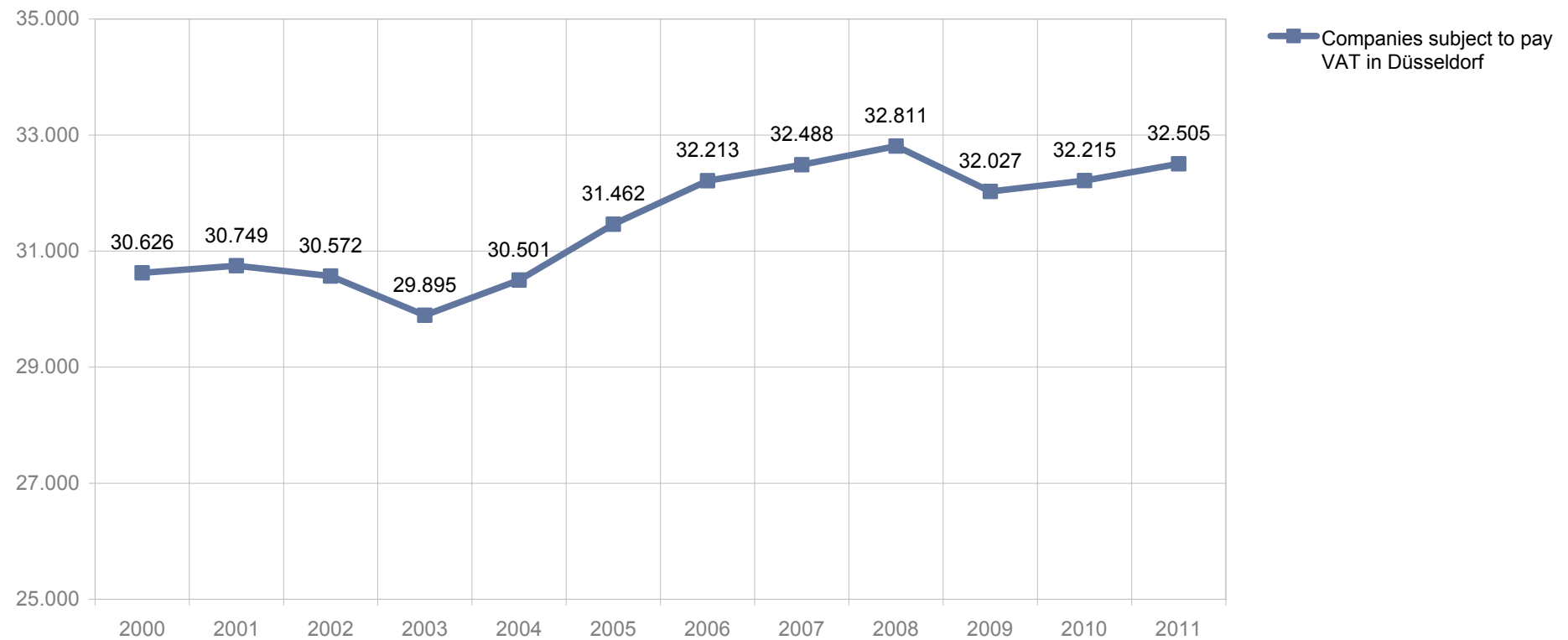
Source: Federal Statistics Office V2013Q1, Company register of regional database B2010. Numbers of inhabitants according to B2010.



Company strength

Numbers of companies in Düsseldorf rising in the long term

Development of companies subject to pay VAT in Düsseldorf 2000 - 2011



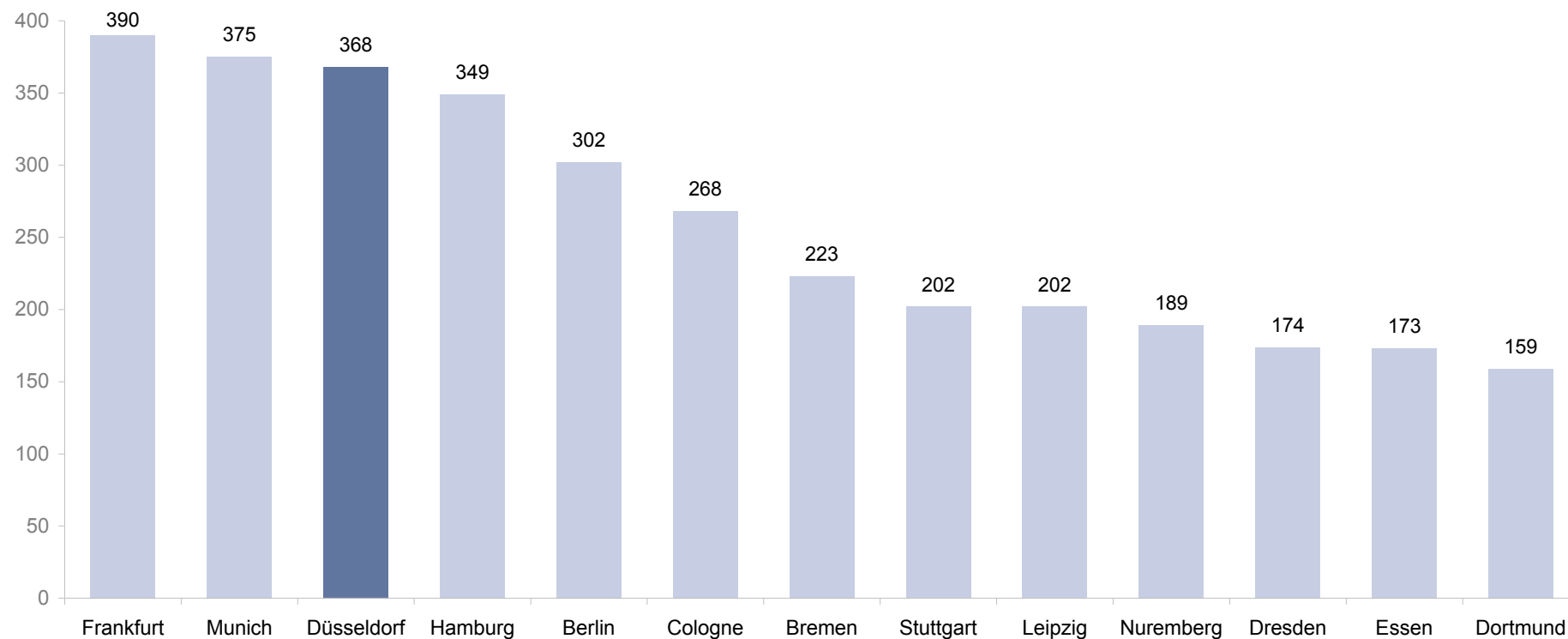
Source: ITNRW V2013Q2. Companies subject to VAT from the VAT statistics are shown. All companies with head office in Düsseldorf are shown with a taxable turnover from deliveries and services of more than 17,500 Euro in the survey year.



Company strength

Düsseldorf - top start-up city

Annual number of new entries in Companies' Register per 100,000 inhabitants



Source: own research from Genios/Bundesanzeiger V2013Q2 B2012.



City of
Düsseldorf

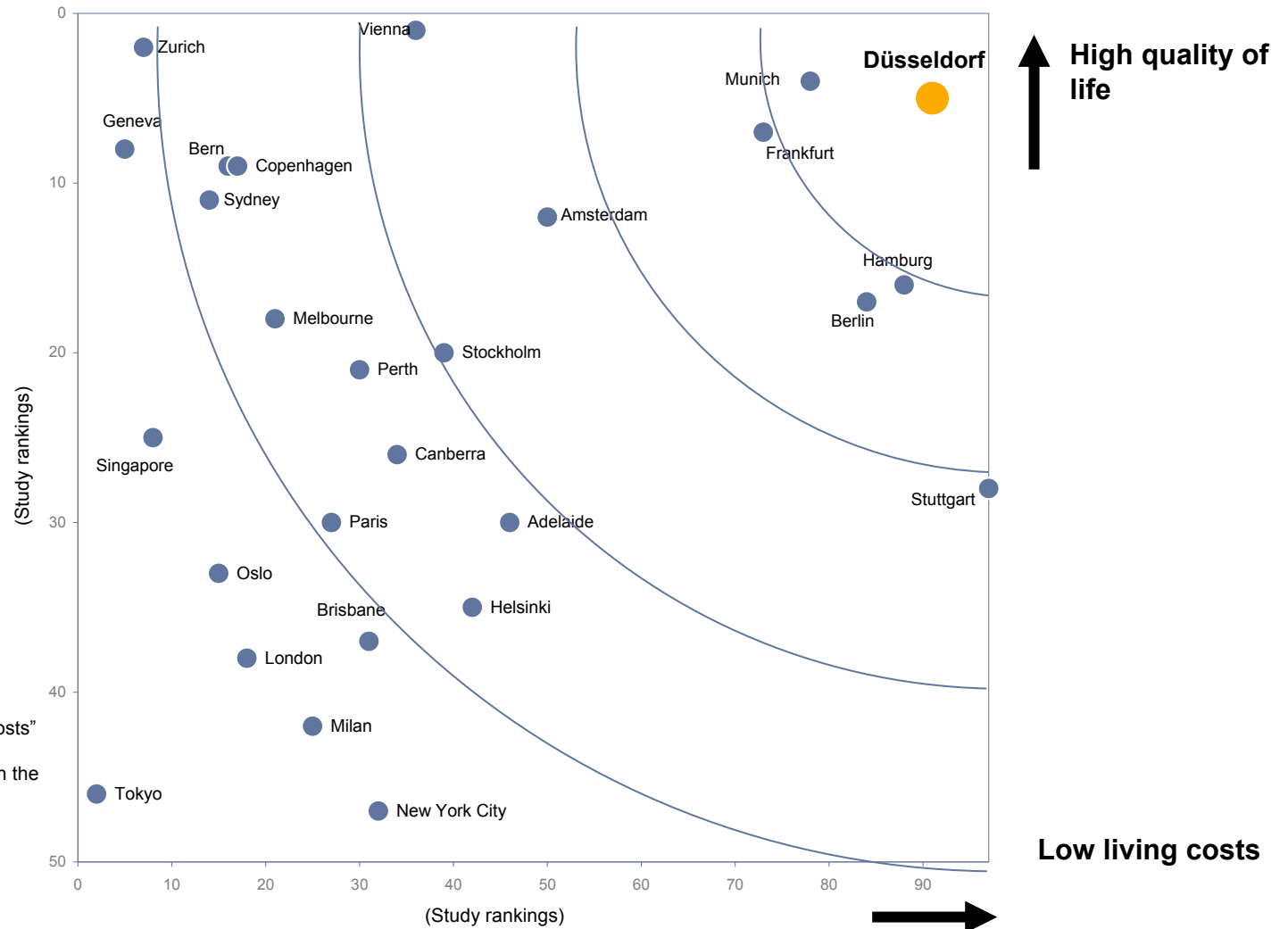
Location costs

Düsseldorf –
moderate
location costs



Location costs

Quality of life in Düsseldorf – ideal cost/benefit ratio



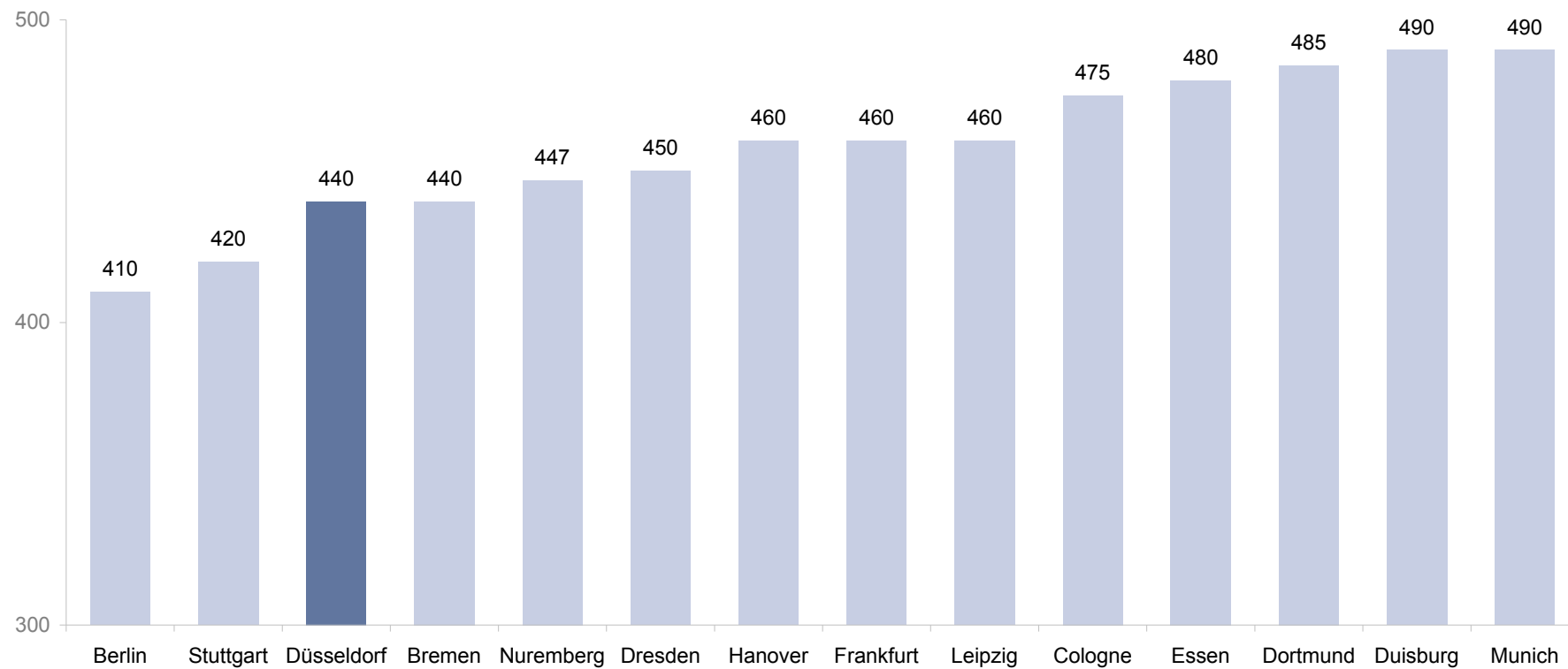
Source: Own comparison of Mercer studies "Quality of Life" and "Living costs" V2011. The chart only shows those cities that were in the best 50 in both studies – extended by the Germany cities up to the top 100 in the costs study.



Location costs

Düsseldorf has a favourable trade tax collection rate compared to other cities

Trade tax collection rates of German cities



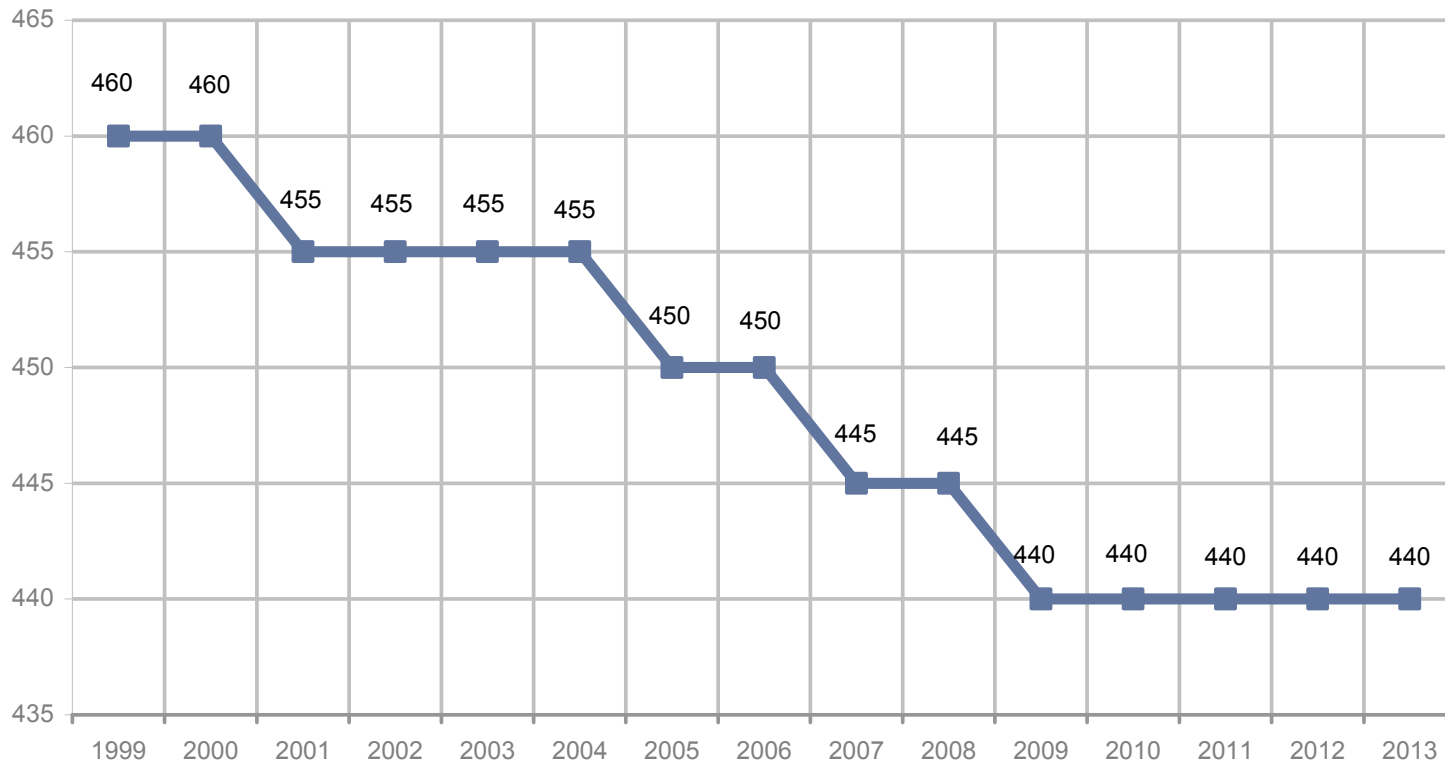
Source: City Councils of the cities in question and Senate Administrations of the city states V2013Q1. Cities with more than 500,000 inhabitants are shown with the exception of Duisburg.



Location costs

Frequent decreases in trade tax ease the burden on Düsseldorf companies

Development of the collection rate for trade tax in Düsseldorf 1999 - 2013



Tax relief volume since 1999:
- € 170 million

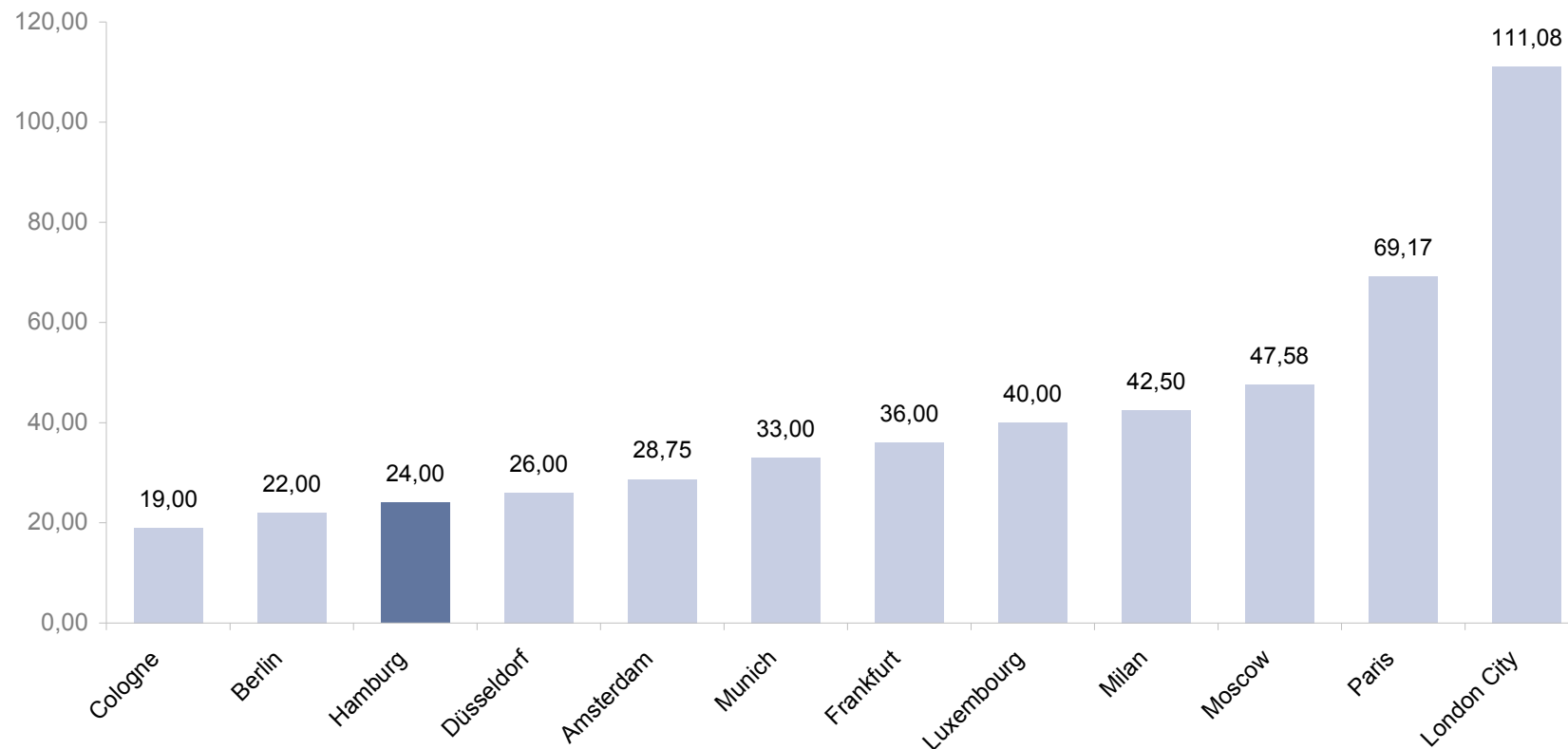
Source: Düsseldorf Tax Office V2013Q1.



Location costs

Düsseldorf – Favourable office market rents compared with other European cities

Top rent for office space in €/m²/month



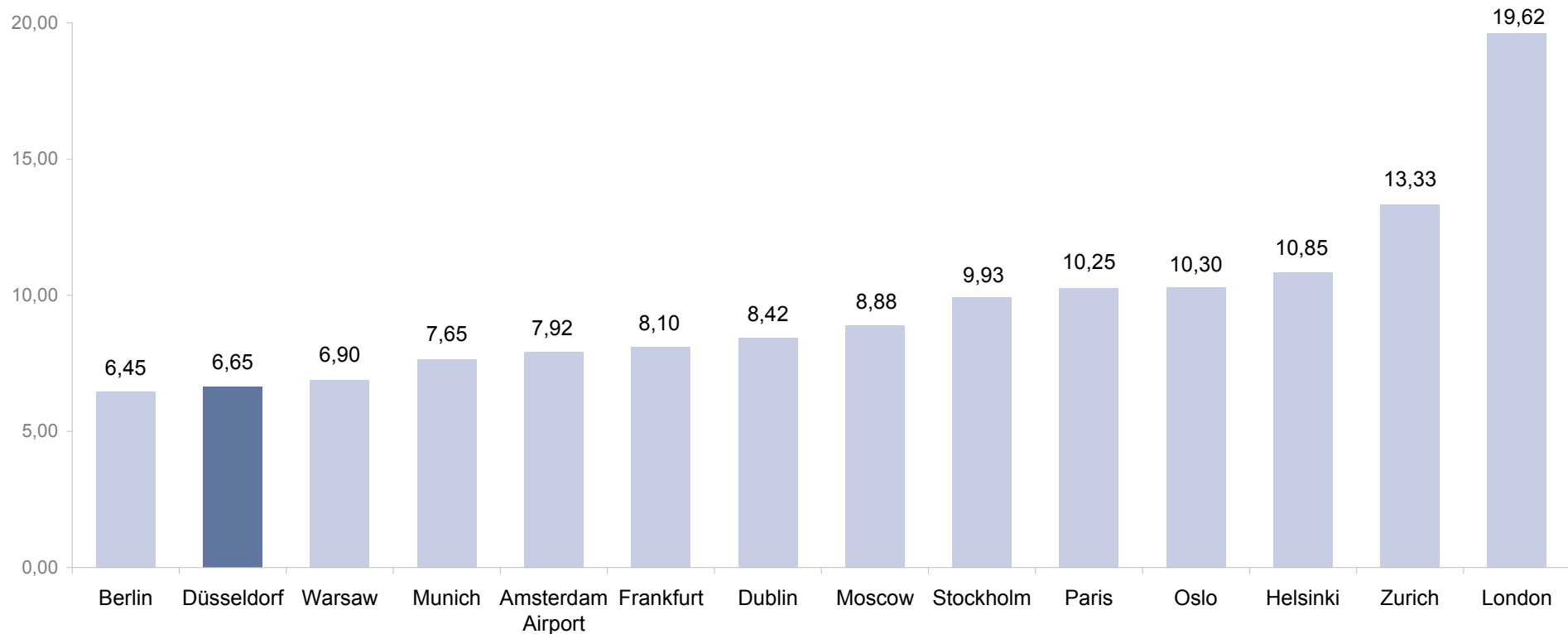
Source: BnP Paribas "European Office Market 2013" V2013Q1 B2012Q4.



Location costs

Very affordable commercial rents in Düsseldorf compared with other European cities

Gross prime rental rates for industrial and logistics property in European cities in €/m²/month



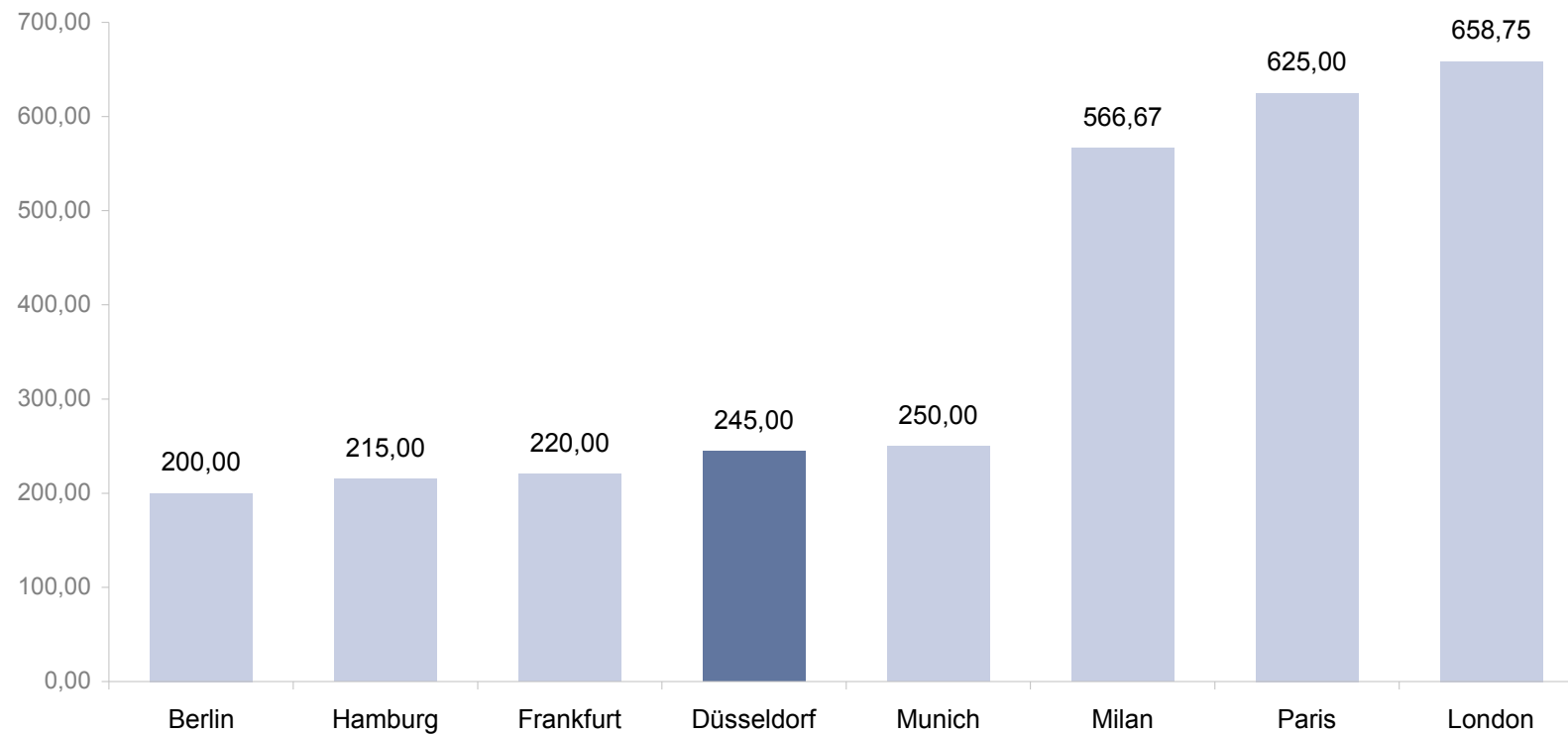
Source: Cushman & Wakefield "Industrial Space Across The World" V2011Q1 B2010Q4.



Location costs

Düsseldorf – Luxury goods offered and moderate shop rents

Prime rents for shops in selected European luxury shopping miles in €/m²/month



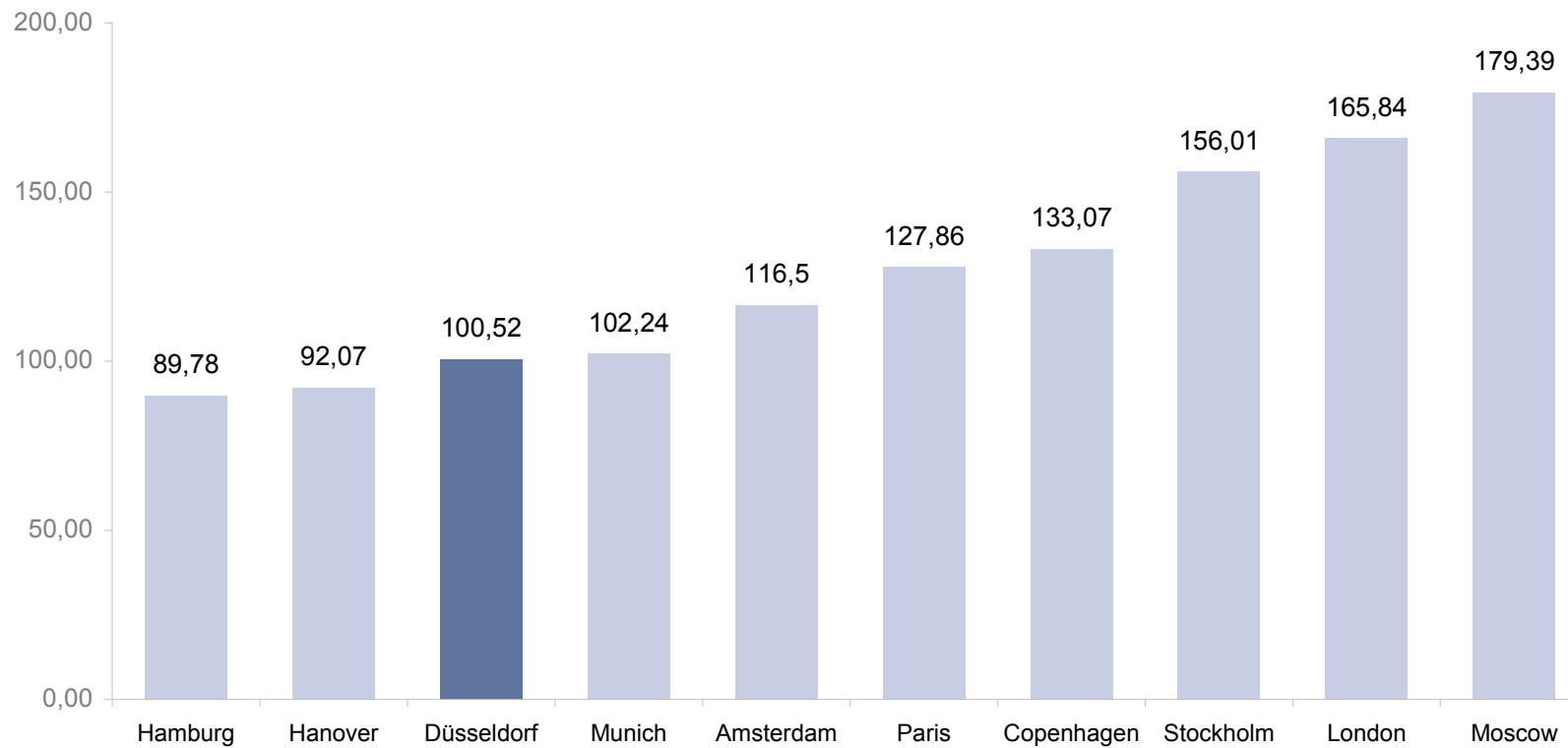
Source: Jones Lang LaSalle "Glitter & glamour shining brightly - The 100 most renowned luxury brands and their presence in Europe's metropolitan centres" V2011Q3.



Location costs

Düsseldorf – attractive for tourism and business travel thanks to moderate hotel prices

Hotel room prices per overnight stay in €



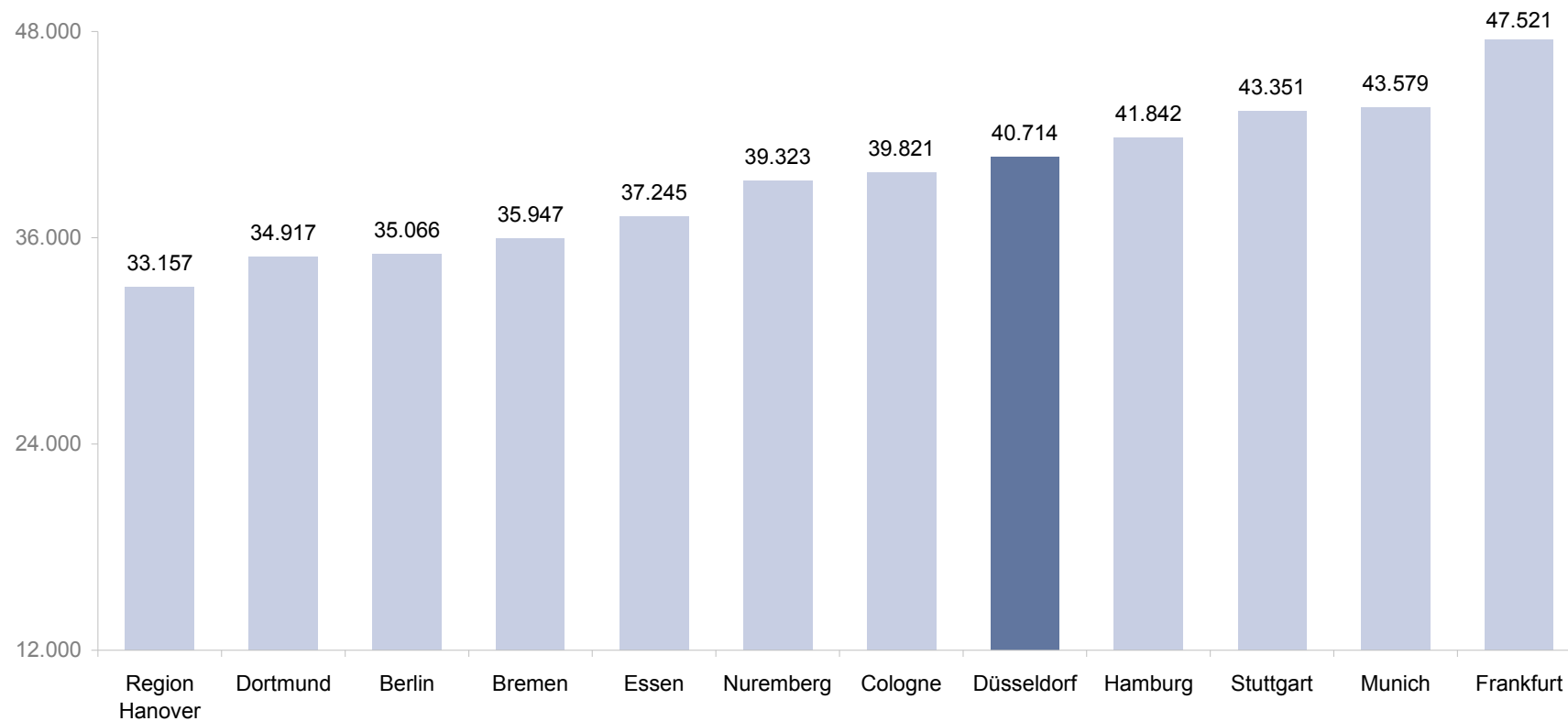
Source: Hotelprice barometer on Hotel.de AG V2012Q4 B2012Q4.



Location costs

Medium level of personnel costs in Düsseldorf

Employee remuneration per head, city comparison in €



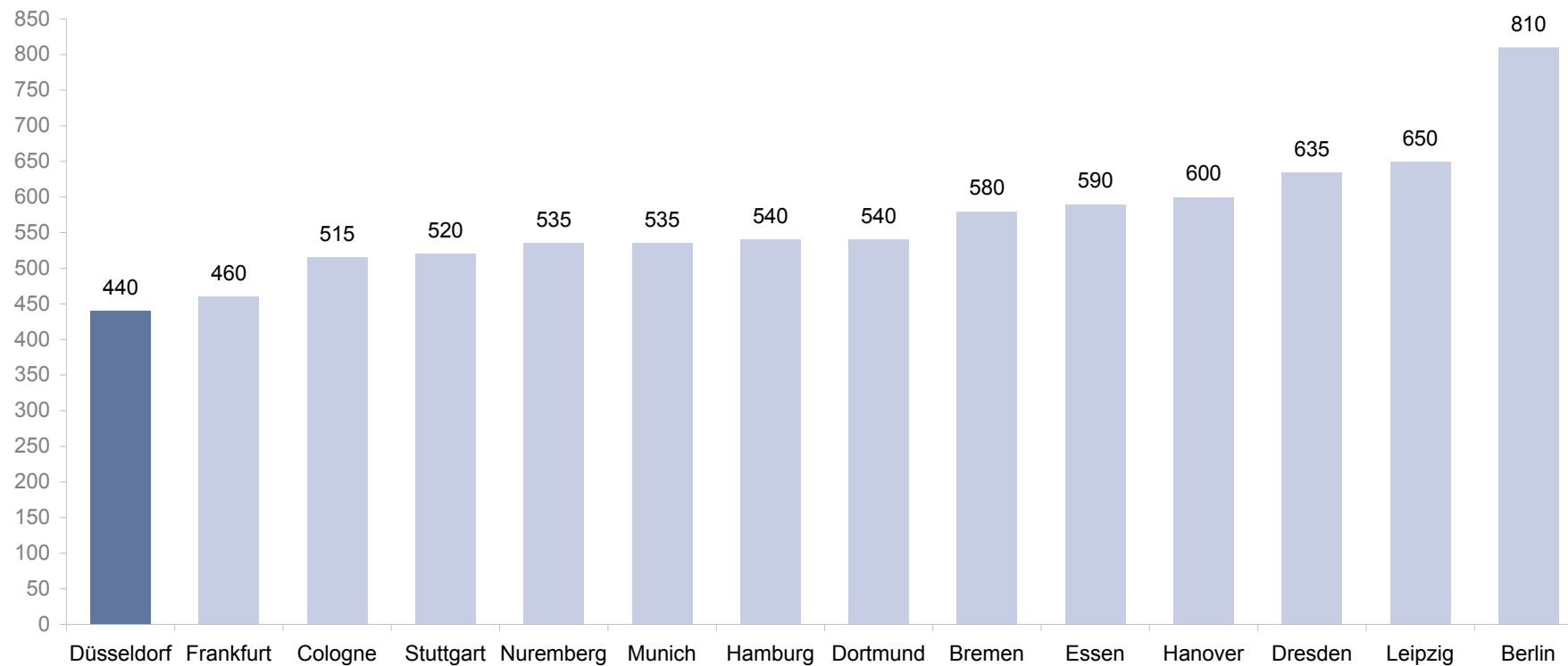
Source: Working Party National Accounts of the Federal States, employee compensation per employee V2012Q3 B2010.



Location costs

Citizen-friendly Düsseldorf – lowest local real estate tax in city comparison

Local real estate tax collection rates B German cities



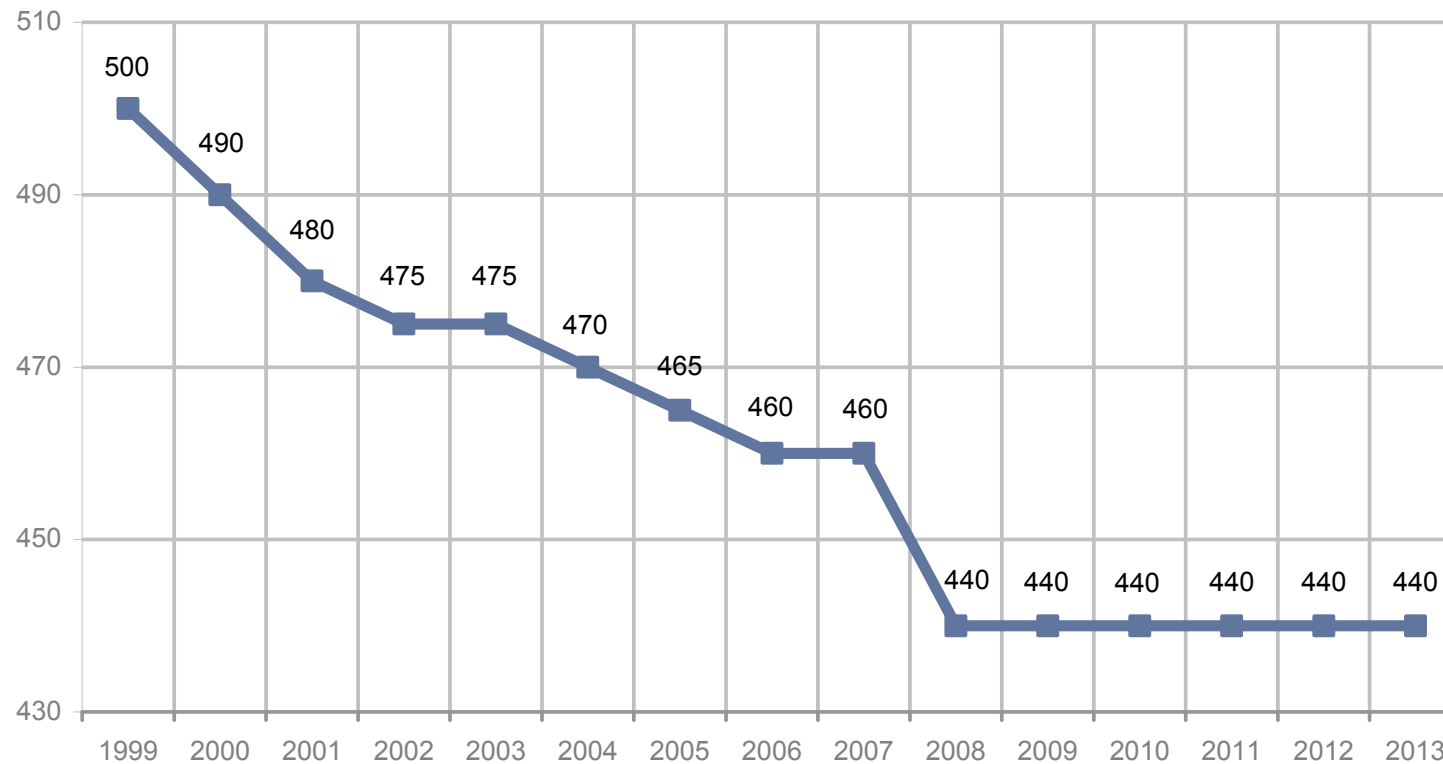
Source: City Councils of the respective cities and Senate Administrations of the city states V2013Q1. Cities with more than 500,000 inhabitants are shown.



Location costs

Frequent decreases in local real estate tax to ease the burden on Düsseldorf's citizens

Development of collection rate for real estate tax B in Düsseldorf 1999 - 2013



Tax relief volume since 1999:
- € 98 million

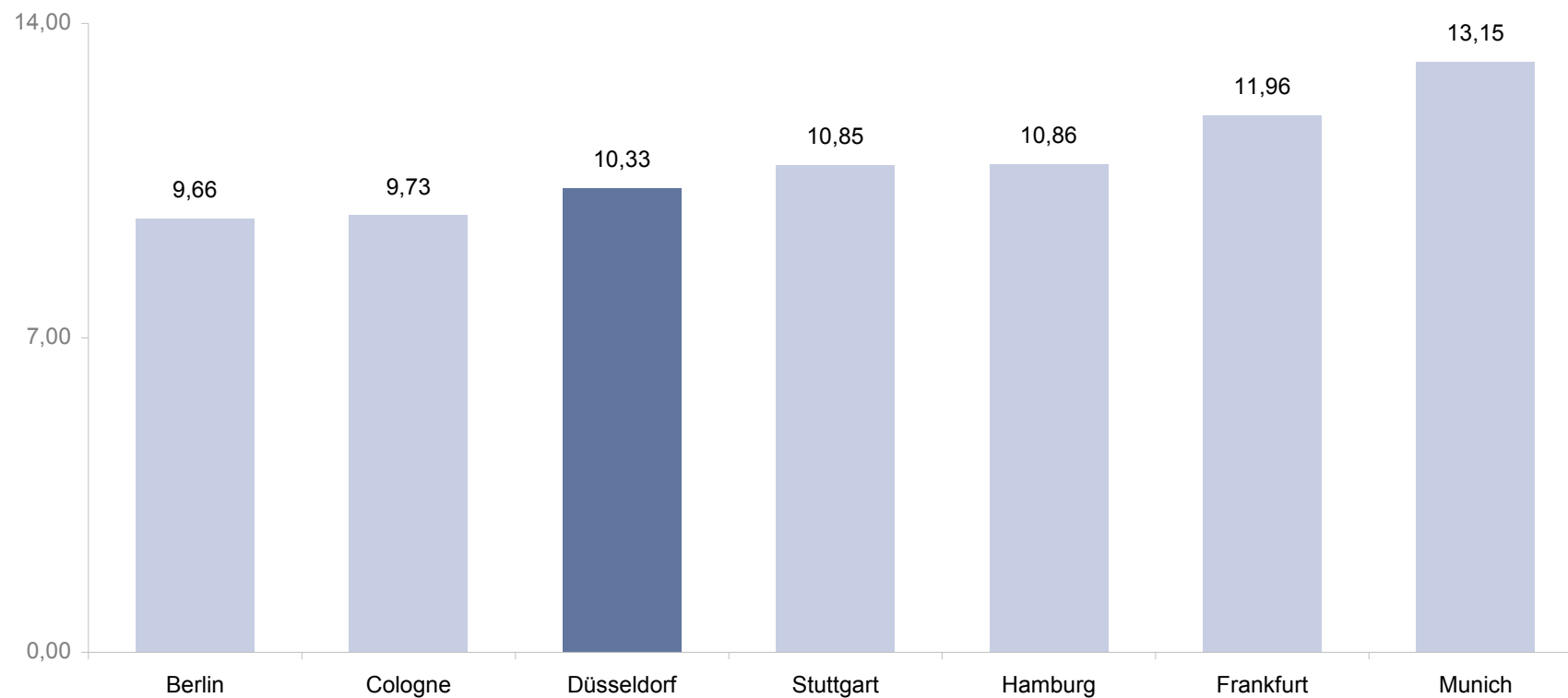
Source: Düsseldorf Tax Office V2013Q1.



Location costs

Housing market – comparatively low rents

Quoted rents compared with other cities in €/m²



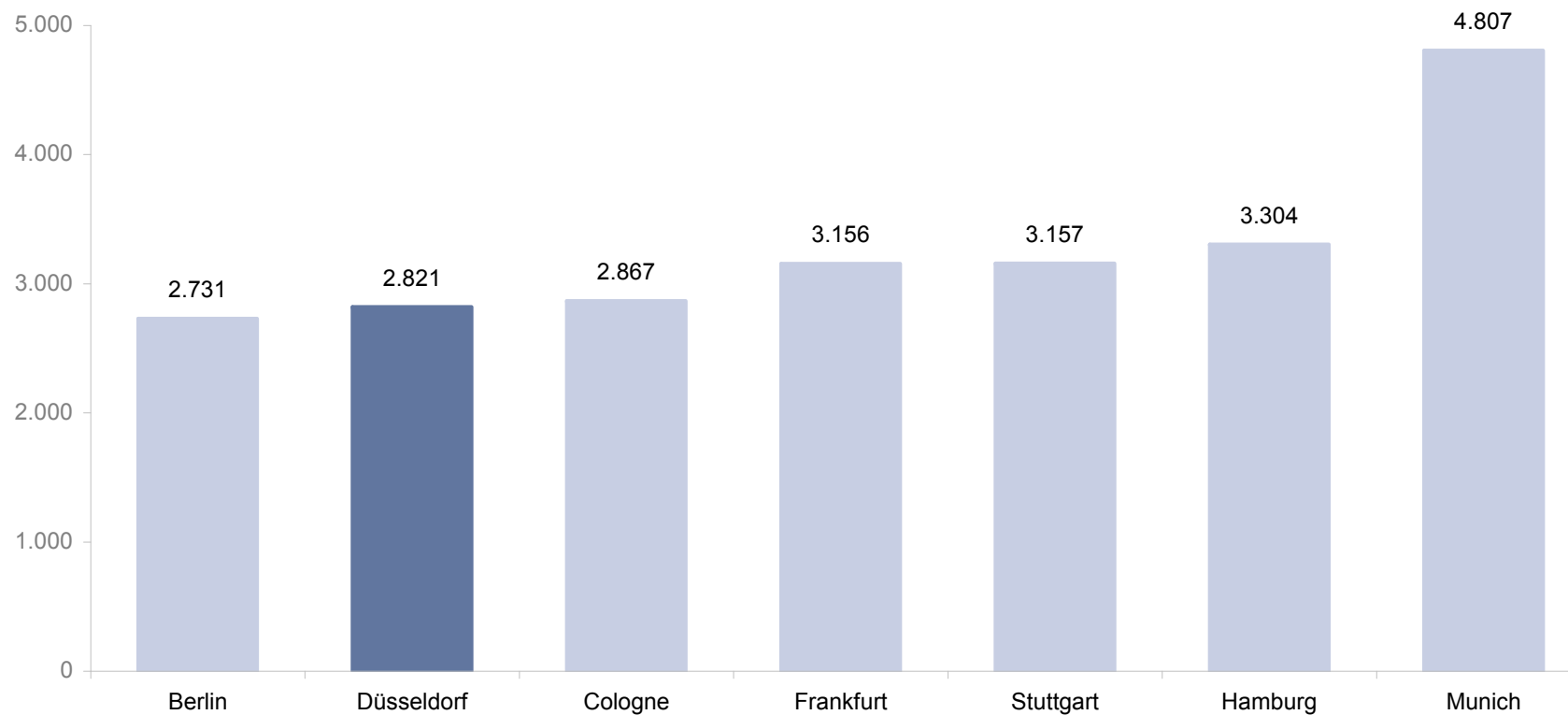
Quelle: empirica rent and purchase price ranking, IDN Immodaten GmbH. V2013Q1 B2012Q4. The average rent quoted is the average rental price of properties offered on the market. It is based on a new property, 60-80 m², high standard of furnishing.



Location costs

Housing market - moderate purchase prices for owner-occupied flats

Average purchase prices offered for owner-occupied flats compared to that of other cities in €/m²



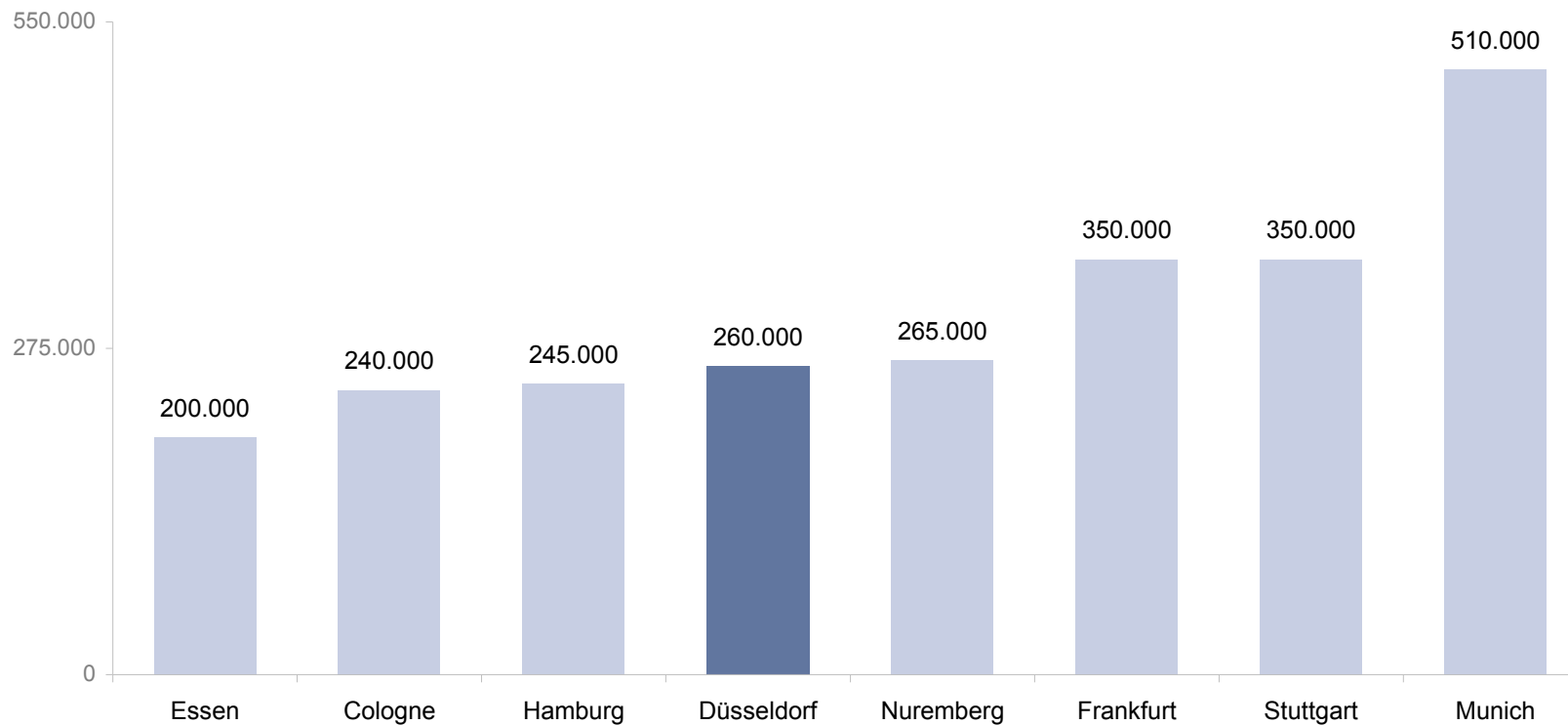
Source: IDN Immodaten GmbH, V2013Q1 B2012Q4. The average purchase price offered is the average purchase price of properties offered on the market. It is based on an owner-occupied flat, new property, 60-80 m², high standard of furnishing.



Location costs

Housing market - moderate purchase prices for owner-occupied homes

Most frequent overall property price for second-hand terraced houses in city comparison in €



Source: LBS V2011Q3 B2011Q2. Most frequent overall property price in medium to good residential area, approx. 100 m² living area, without garage, plot typical of locality.



City of
Düsseldorf

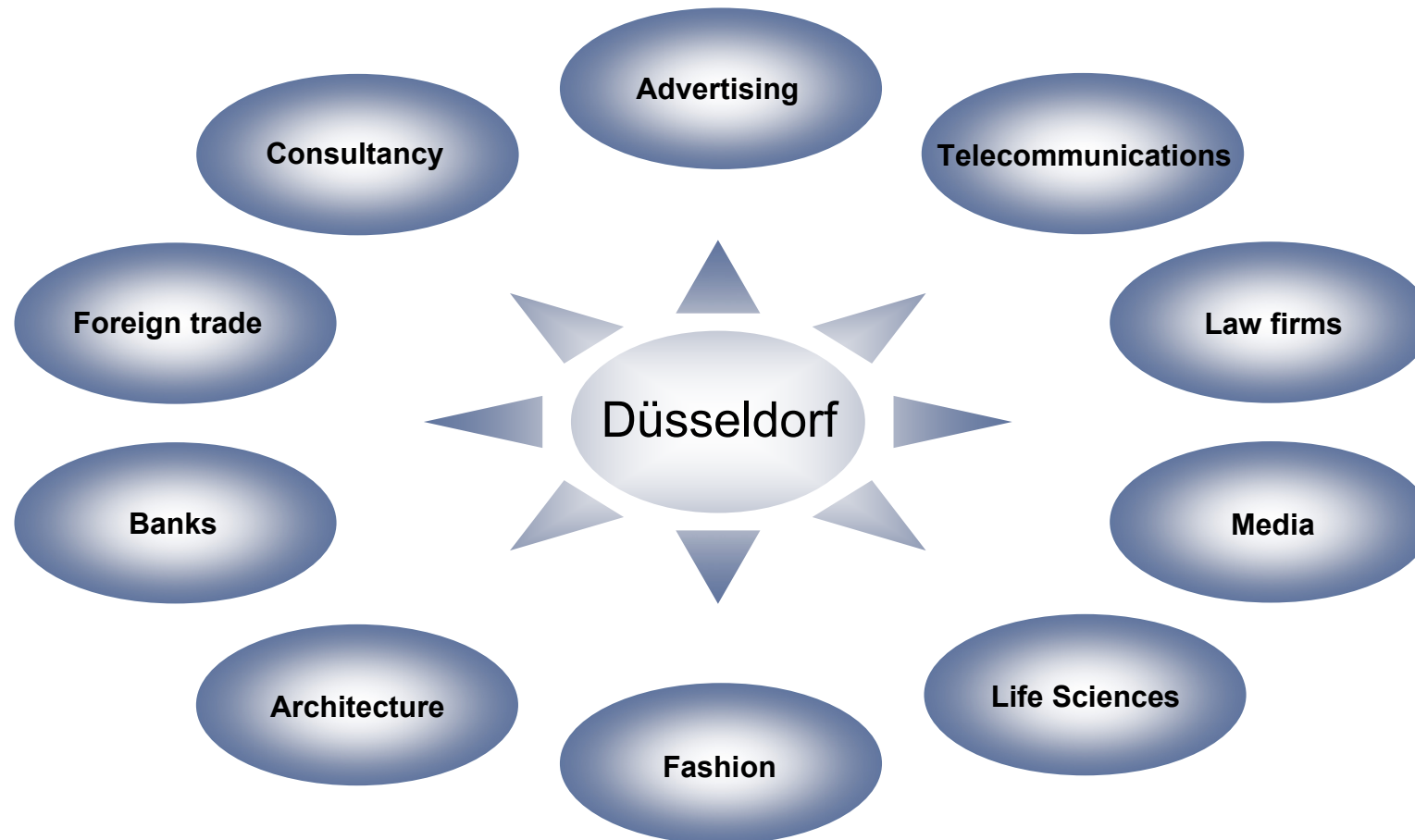
Industry structure

Düsseldorf - industry structure structural change



Industry structure

Düsseldorf – wide variety of strong industries and clusters





Industry structure

Düsseldorf's highly productive industry mix

Gross value added in € billion and employees according to business sectors in Düsseldorf

WZ08 Code	Sectors	Gross value added 2010 in € billion	Sector shares in %	Employees 2011	Sector shares in %
A	Agriculture and forestry, fishing	13	0,0%	800	0,2%
B,D,E	Energy, water supply, waste disposal, quarrying	377	1,1%	5.700	1,1%
C	Manufacturing industry	3.238	9,2%	39.800	7,9%
F	Construction industry	720	2,1%	13.000	2,6%
B-F	Production industry	4.336	12,4%	58.500	11,7%
G-J	Trade, transportation and storage, catering industry, information and communication	9.549	27,3%	151.900	30,3%
K-N	Finance, insurance and corporate services; land and housing	14.649	41,8%	154.100	30,7%
O-T	Public and other service providers, education and health, priv. households with domestic staff	6.467	18,5%	136.200	27,2%
G-T	Service sectors	30.665	87,6%	442.200	88,2%
A-T	Düsseldorf as a whole	35.014	100,0%	501.500	100,0%

Source: Working Party National Accounts, Gross value added V2012Q4 B2010. Working party employee statistics, employees V2013Q2 B2011. According to business sectors of WZ08.



Industry structure

Düsseldorf – strong presence as consultancy, finance, ITC and service location

Employees liable to pay social security contributions in Düsseldorf and Germany in sector comparison

WZ08 Code	Sectors	Number in Düsseldorf	Sector share in Düsseldorf	Sector share in -Germany	Deviation from Germany share	
A, B	Agriculture and Forestry, fishery; mining, quarrying	527	0,1%	1,1%	-1,0%	
C	Manufacturing industry	40.021	10,8%	22,5%	-11,7%	
D, E	Energy and water supply; waste water and waste disposal, removal of environmental pollution	5.623	1,5%	1,6%	-0,1%	
F	Construction industry	8.968	2,4%	5,7%	-3,3%	
G	Trade; Servicing and repair of vehicles	52.776	14,2%	14,4%	-0,2%	
H	Transportation and storage	18.700	5,0%	5,1%	-0,1%	
I	Catering industry	14.223	3,8%	3,1%	0,7%	
J	Information and Communication	22.952	6,2%	3,0%	3,1%	x
K	Provision of financial and insurance services	32.224	8,7%	3,5%	5,2%	x
L	Land and housing	4.685	1,3%	0,8%	0,5%	
M	Provision of freelance, scientific and technical services	48.556	13,1%	6,0%	7,1%	x
N	Provision of other business services	36.930	10,0%	7,0%	3,0%	x
O, U	Public administration, defence; social security; extraterritorial organisations and bodies	25.846	7,0%	5,9%	1,1%	
P	Education and teaching	7.682	2,1%	3,8%	-1,7%	
Q	Health and Social Services	34.898	9,4%	12,7%	-3,3%	
R	Arts, Entertainment and Recreation	3.020	0,8%	0,8%	0,0%	
S	Provision of other services	12.794	3,4%	2,8%	0,7%	
T	Private households	692	0,2%	0,1%	0,0%	
	No information or allocation possible	5	0,0%	0,0%	0,0%	
	Total	371.122	100,0%	100,0%	0,0%	

Sectors of above-average significance in Düsseldorf

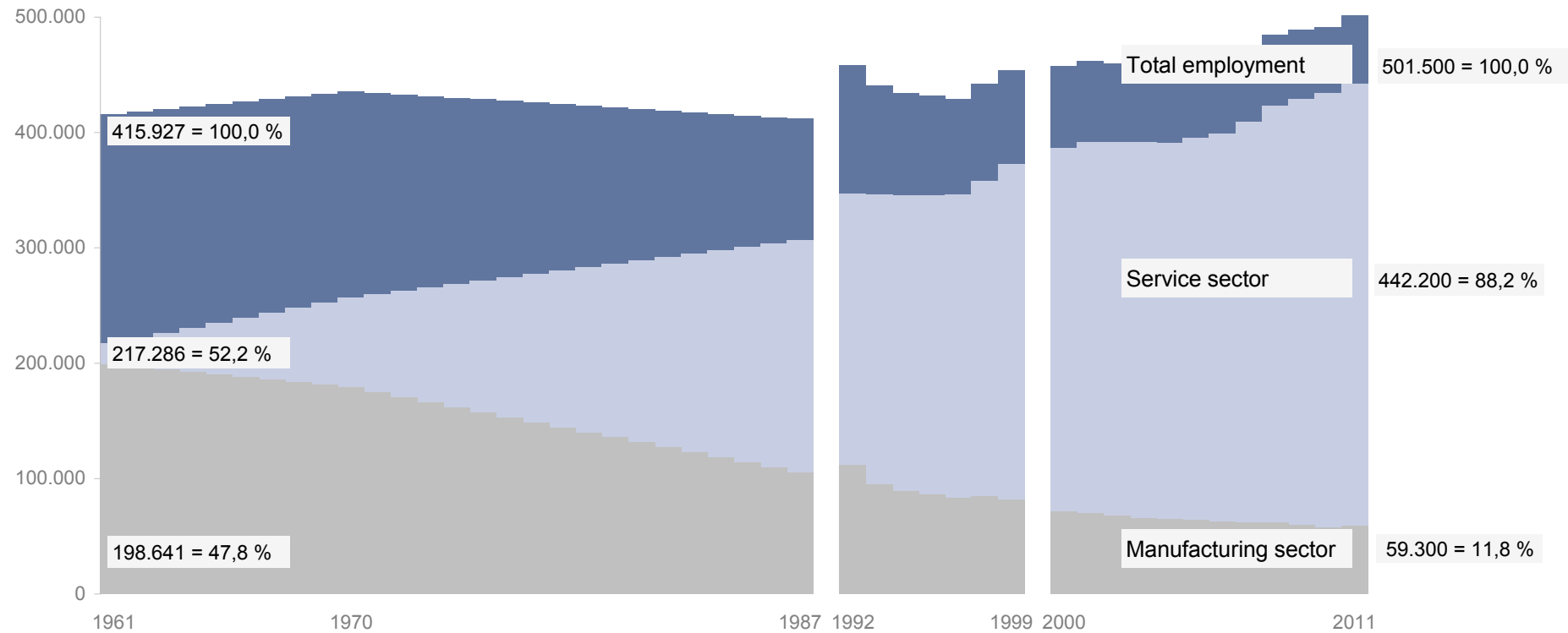
Source: Federal Employment Agency V2013Q1 B2012Q2. x = sectors with stronger than average presence in Düsseldorf.



Industry structure

Sectoral structural change is far advanced in Düsseldorf

Long-term development of number of people in employment in Düsseldorf according to business sectors 1961 - 2011



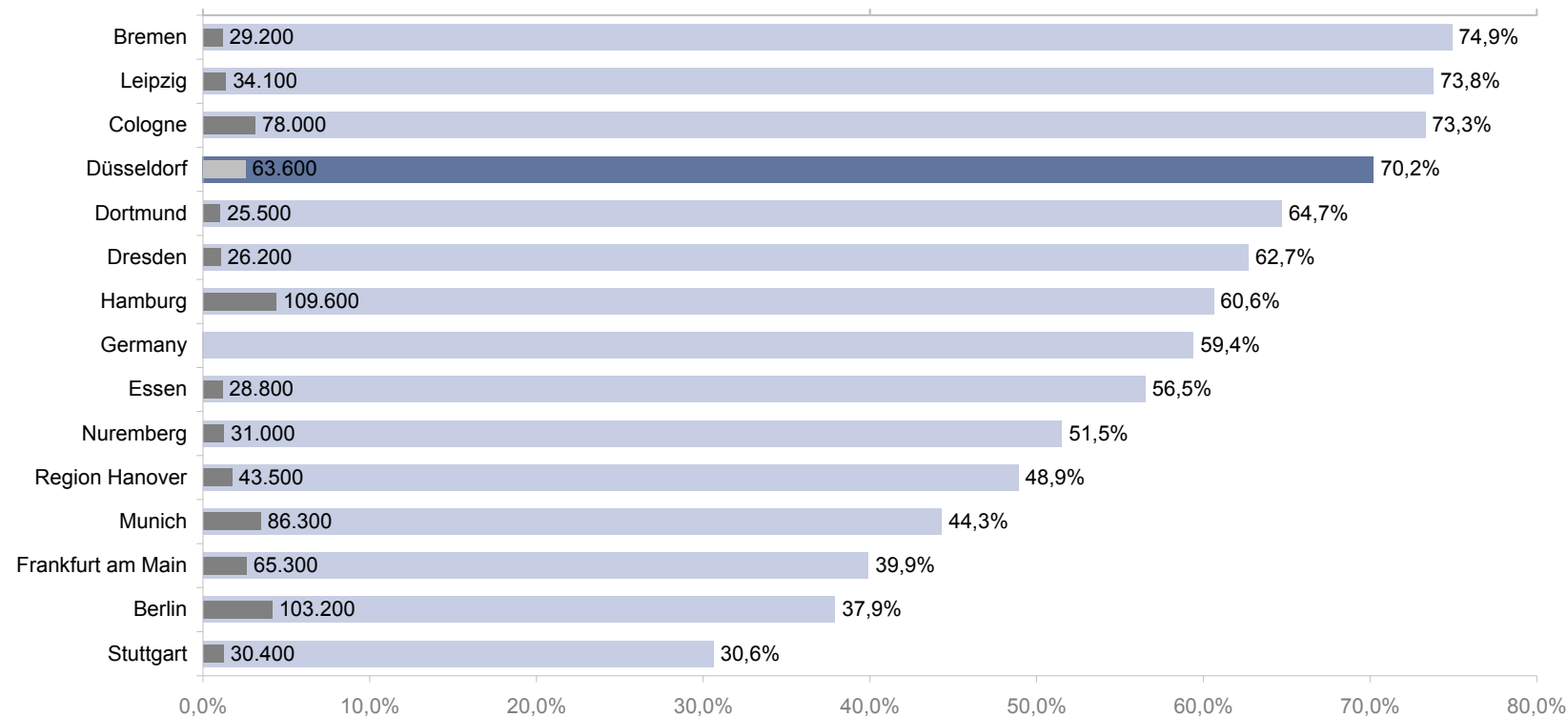
Source: Working Party, Official Federal and State Employment Statistics V2013Q2. Data up to 1987 from Workplace Census, from 1992 from Official Federal and State Employment Statistics. There has recently been a new return calculation to the year 2000. The manufacturing sector includes the building and energy sectors and agriculture.



Industry structure

Above-average increase in business services in Düsseldorf

Development of employees in the business services sector 1996 – 2011 in absolute terms and in %



Source: Working party employment statistics, employees in the sector "Financing, Rental, Business Services and Real Estate" V2013Q3. Values from 1996 (WZ03) have been converted with the WZ08/WZ03 EWT-ratio from the year 2000.



Industry structure

Many sectors in Düsseldorf contribute to employment growth

Development of employees liable to pay social security contributions in Düsseldorf in sector comparison

WZ08 Code	Sectors	SVB 2008	SVB 2012	2008 – 2012 abs.	2008 – 2012 in %
A, B	Agriculture and Forestry, fishery; mining, quarrying	522	527	5	1,0%
C	Manufacturing industry	42.996	40.021	-2.975	-6,9%
D, E	Energy and water supply; waste water and waste disposal, removal of environmental pollution	4.697	5.623	926	19,7%
F	Construction industry	10.765	8.968	-1.797	-16,7%
G	Trade; Servicing and repair of vehicles	56.802	52.776	-4.026	-7,1%
H	Transportation and storage	20.409	18.700	-1.709	-8,4%
I	Catering industry	13.173	14.223	1.050	8,0%
J	Information and Communication	20.551	22.952	2.401	11,7%
K	Provision of financial and insurance services	32.042	32.224	182	0,6%
L	Land and housing	5.566	4.685	-881	-15,8%
M	Provision of freelance, scientific and technical services	42.062	48.556	6.494	15,4%
N	Provision of other business services	31.570	36.930	5.360	17,0%
O, U	Public administration, defence; social security; extraterritorial organisations and bodies	25.766	25.846	80	0,3%
P	Education and teaching	6.744	7.682	938	13,9%
Q	Health and Social Services	30.835	34.898	4.063	13,2%
R	Arts, Entertainment and Recreation	2.277	3.020	743	32,6%
S	Provision of other services	11.257	12.794	1.537	13,7%
T	Private households	504	692	188	37,3%
	No information or allocation possible	33	5	-28	-84,8%
	Total:	358.571	371.122	12.551	3,5%

Source: Federal Employment Agency, Employment Statistics V2013Q1 B2012Q2.



City of
Düsseldorf

Education and research

Education and research region Düsseldorf

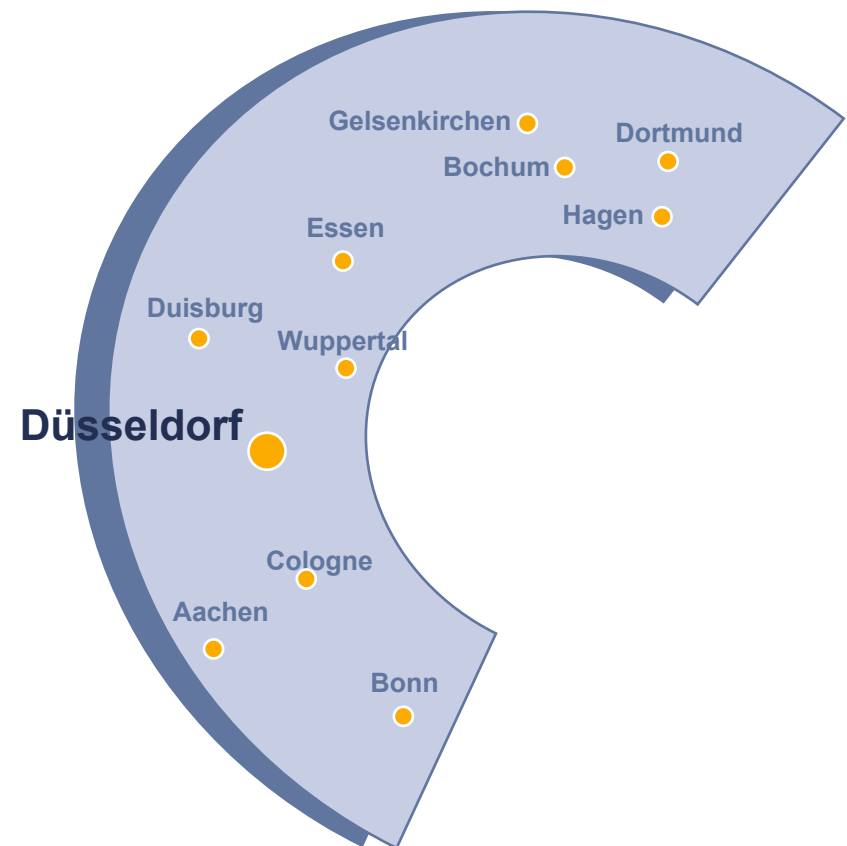


Education and research

Excellent research presence in Greater Düsseldorf Area

Education/Research in Greater Düsseldorf area

- 30 public and 26 private universities
- Over 500,000 students
- 12 Max Planck Institutes
- 6 International Max Planck Research Schools
- 11 Fraunhofer Institutes
- 3 Research Centres of the Helmholtz-Gemeinschaft
- 10 Institutes of the Leibniz-Gemeinschaft
- DFG German Research Foundation
- VDI Association of German Engineers
- North Rhine-Westphalia Academy for Sciences and Arts
- Ministry of Innovation, Science and Research of the State of North Rhine-Westphalia



Source: Ministry for Innovation, Science and Research of the State of North Rhine-Westphalia V2011Q2



City of
Düsseldorf

Education and research

Düsseldorf – expertise in academic education



FH D

Educational institutions in Düsseldorf (examples in alphabetical order)

Academy for Public Health

DIWA, Düsseldorf Innovation and Science Agency

Düsseldorf Institute for Competition Economics (DICE)

EMBA Düsseldorf Europ. Media and Business Academy

University of Applied Sciences Düsseldorf

University of Applied Sciences for Public Admin. NRW

Fliedner University of Applied Sciences for Health and Education

FOM University of Applied Sciences for Economy and Management

Heinrich-Heine University

Arts Academy Düsseldorf

MD.H Mediadesign College

Robert Schumann School of Music

VWA Administration and Business Academy

Source: Statistical Office and Business Development Office Düsseldorf V2011Q4.



City of
Düsseldorf

Education and research

High density of Max Planck Institutes in North Rhine-Westphalia



MP Institutes in North Rhine-Westphalia

- MPI for Chemical Energy Conversion
- MPI for Biology of Aging
- MPI for Iron Research
- MPI for Research on Collective Goods
- MPI for the Study of Societies
- MPI for Coal Research
- MPI for Mathematics
- MPI for Molecular Biomedicine
- MPI for Molecular Physiology
- MPI for Neurological Research
- MPI for Radio Astronomy
- MPI for Plant Breeding Research

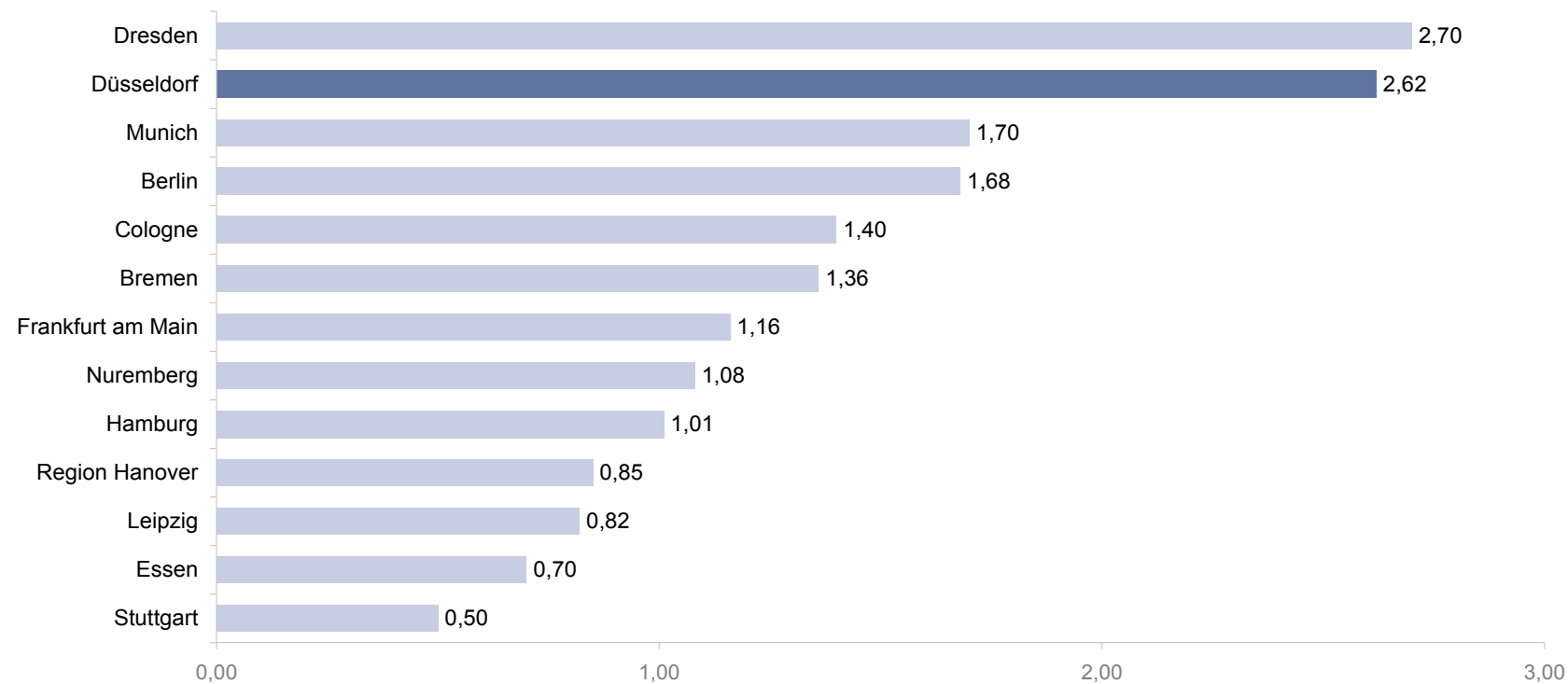
Source: Ministry for Innovation, Science and Research of the State of North Rhine-Westphalia V2011Q2



Education and research

Düsseldorf – high-technology location

High-tech start-ups in manufacturing per 100,000 employable inhabitants in the period 2007 – 2010 compared by city



Sources: Centre for European Business Research (ZEW), High-Tech start-ups in Germany 2011, V2011Q4.



City of
Düsseldorf

Education and research

Düsseldorf – successful patent region

No. 1 in the areas:

- organic chemistry
- dyes, mineral oil industry, oils, fats

No. 2 in the areas

- organic chemistry
- dyes, mineral oil industry, oils, fats
- construction
- hoisting, lifting, saddlery
- grinding, extrusion, tools
- separating, mixing
- medical, dental and cosmetic preparations
- textiles or flexible materials



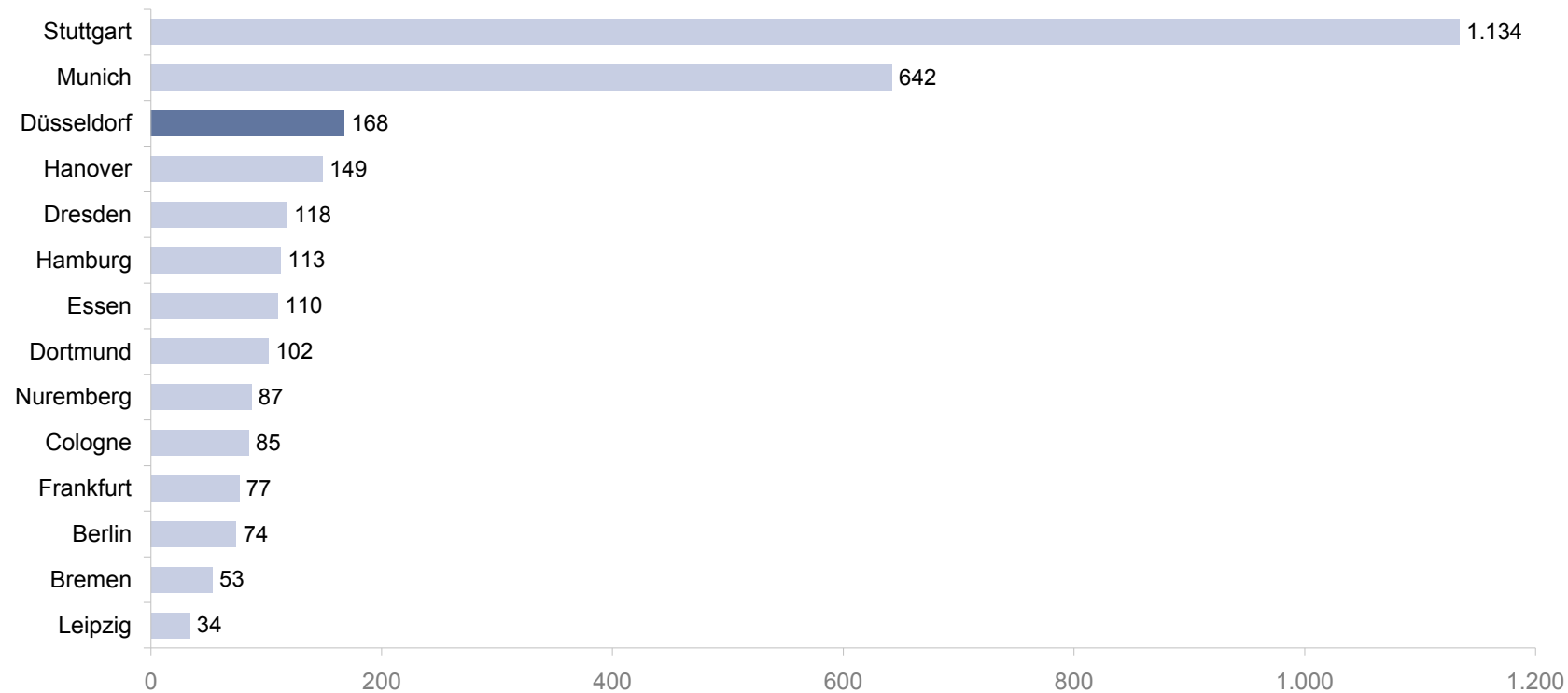
Source: German Patent and Trademark Office. Basis: Spatial Planning Regions. V2010Q3



Education and research

Düsseldorf - the innovative city

Patent and utility model registrations according to registered office of company registering patent per 10,000 employees liable to pay social contributions* in period 2005 – 2010



Source: German Patent and Trademark Office (Online research in DPMA Register V2013Q2.) *Average employment in period 2005 to 2010. The cities listed are zoned by postcode areas according to telefonbuch.de.



City of
Düsseldorf

Trade and exhibition

Trade and
exhibition location
Düsseldorf



Trade and exhibition

Top trading location Düsseldorf

Trade in Düsseldorf

- 7,087 traders (business register), including:
 - 3,779 retailers
 - 2,601 wholesalers
 - 707 car dealers
- 72,900 working population
- Around € 4.1 billion annual retail trade turnover
- 970,248 m² retail trade sales area
- Top trade fair “Euroshop”
- Exclusive shopping mile KÖ (Königsallee)
- Top fashion location (e.g. venue for “Vogue Fashion’s Night Out”)



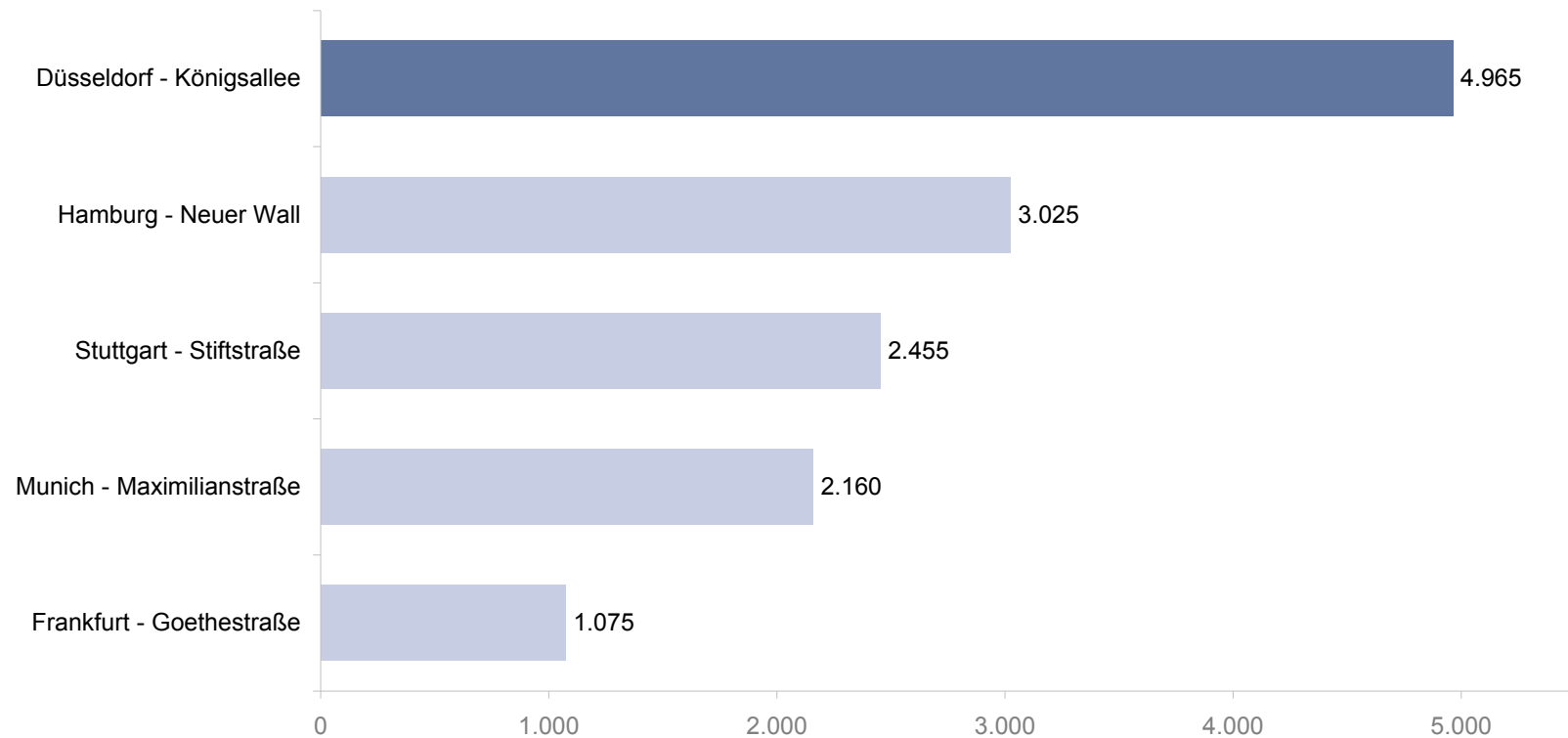
Source: Business Development Düsseldorf V2012Q2



Trade and exhibition

Düsseldorf “Kö” – most frequently visited luxury shopping mile in Germany

Foot traffic on a Saturday afternoon (27.04.2013, 1 – 2 p.m.)



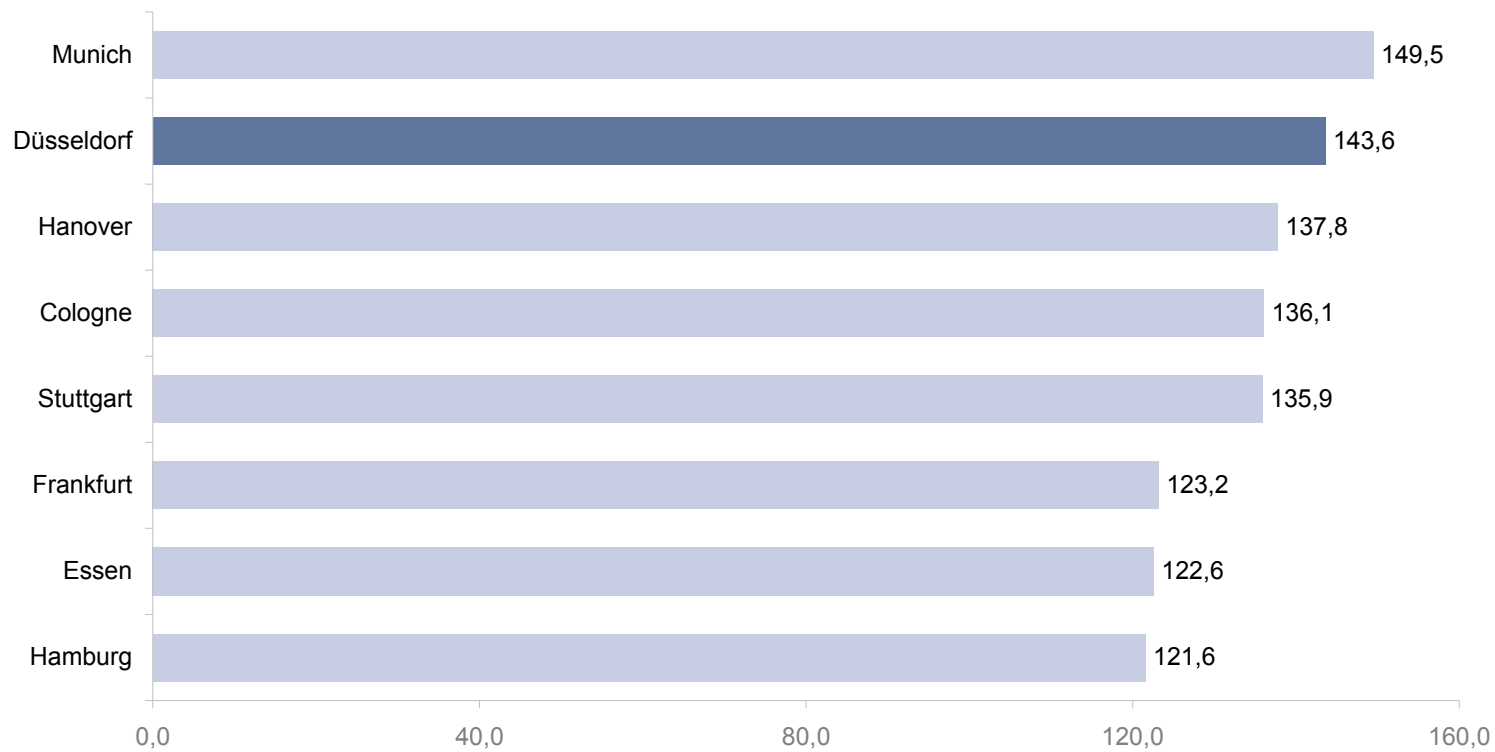
Source: Jones Lang LaSalle, Press release of 29.07.2013 on foot traffic frequency counted in German shopping miles. V2013Q3.



Trade and exhibition

Düsseldorf – shopping paradise with high turnover for retailers

Strength of retail turnover in German cities (turnover index per inhabitant, Germany = 100)



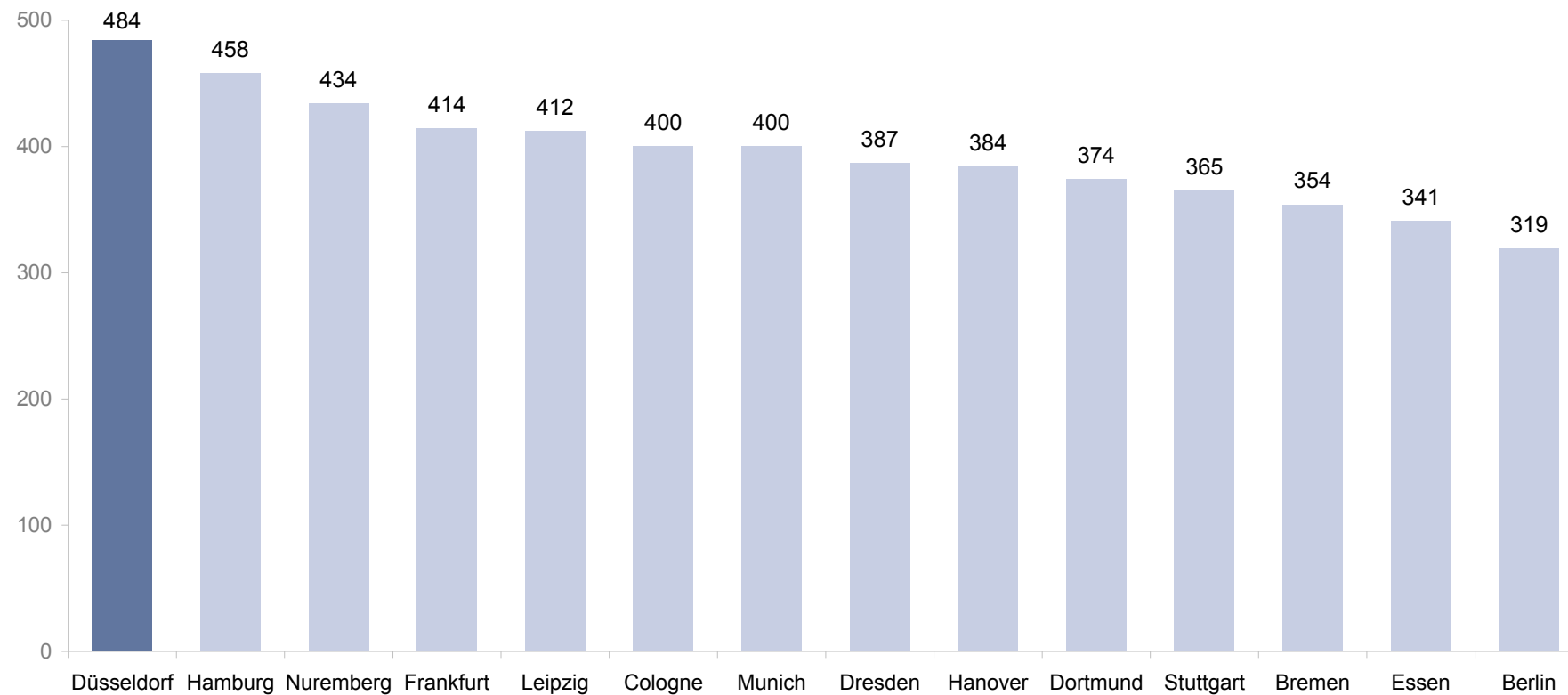
Sources: GfK Nürnberg, Retail revenue index V2013Q1.



Trade and exhibition

Highest retail staff density in city comparison ensures best customer care

Employees liable to pay social security contributions in retail trade per 10,000 inhabitants



Sources: Federal Employment Agency Employee statistics V2013Q1 B2012Q2, WZ08-no.: 45,47. Federal Statistics Office, Numbers of inhabitants B2011Q4.



Trade and exhibition

Around one third of taxable income in Düsseldorf comes from trading

Companies liable to pay tax and taxable turnover of Düsseldorf commerce

Sector	WZ08 Code	Companies liable to pay tax		Taxable turnover*	
		Number	Share in Düsseldorf business in %	In € billion	Share in Düsseldorf business in %
Car dealers & repair	45	608	1,9 %	1,7 Mrd. €	1,0 %
Wholesalers	46	1.974	6,1 %	25,4 Mrd. €	15,1 %
Retailers	47	3.198	9,8 %	27,1 Mrd. €	16,2 %
Total trade	45 – 47	5.780	17,8 %	54,2 Mrd. €	32,3 %

Source: ITNRW, VAT statistics V2013Q3 B2011Q4. WZ08-Nr: 45 – 47. * = taxable turnover is calculated according to head office and includes branches in other cities.



Trade and exhibition

Düsseldorf - important trading and sales location

Trade and Sales in Düsseldorf (examples listed alphabetically)

Air Liquide, technical gases

C & A, fashion

Metro, wholesalers and retailers

Mitsui, universal trade

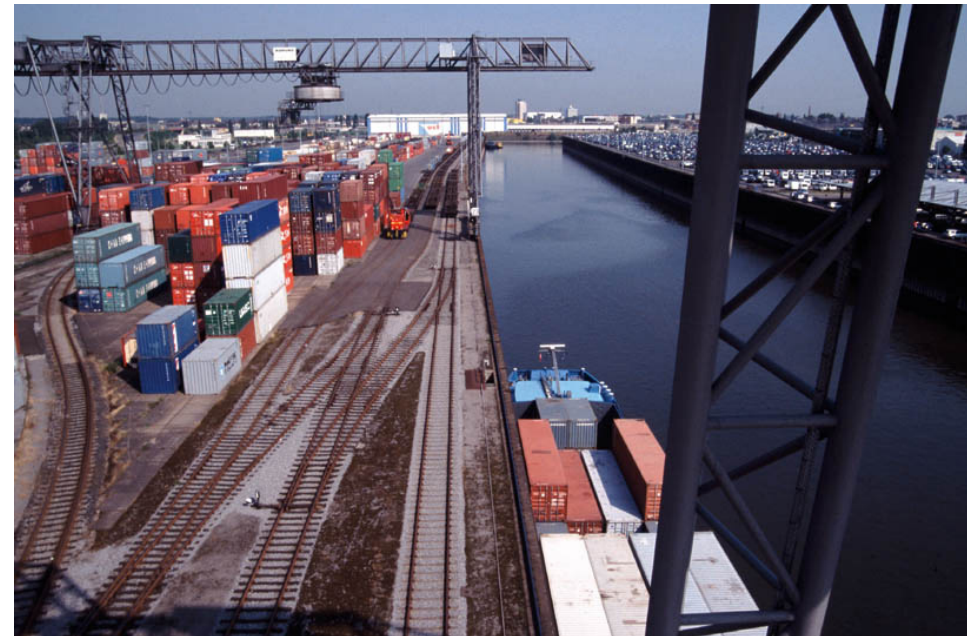
Mitsubishi, universal trade

Oracle, software

Peek & Cloppenburg, fashion

Salzgitter Mannesmann Handel, steel

Schmolz & Bickenbach, steel



Source: Business Development Düsseldorf V2011Q2



City of
Düsseldorf

Trade and exhibition

Düsseldorf's trade fairs are a meeting point for world business

Trade fair location Düsseldorf at a glance

- No. 1 in capital goods sector
- 50 international trade fairs in Düsseldorf
- 24 of which are leading fairs worldwide
- Capacity in 19 exhibition halls: 306,000 m²
- Best annual turnover: around € 500 million
- Up to 33,000 exhibitors per year
- Up to 2 million visitors per year
- Share of foreign exhibitors: up to 60 %
- 68 foreign representative offices for 130 countries
- 8 int. subsidiaries and affiliates
- Around 120 events abroad per year



Sources: Messe Düsseldorf V2013Q2.



City of
Düsseldorf

Industry

Düsseldorf -
top industrial
location



Industry

Key data on Düsseldorf as an industrial location

Manufacturing industry	Reference year	Number	Share of total Düsseldorf in %
Active companies (Register of Companies)	2010	1,497	3.8 %
Gross value added	2010	€ 3.24 billion	9.2 %
Gross value added per employee	2010	€ 79,725	
Number employed	2010	38,000	7.7 %
Turnover of companies with 50 or more employees	2011	€ 10.0 billion	n.a. *

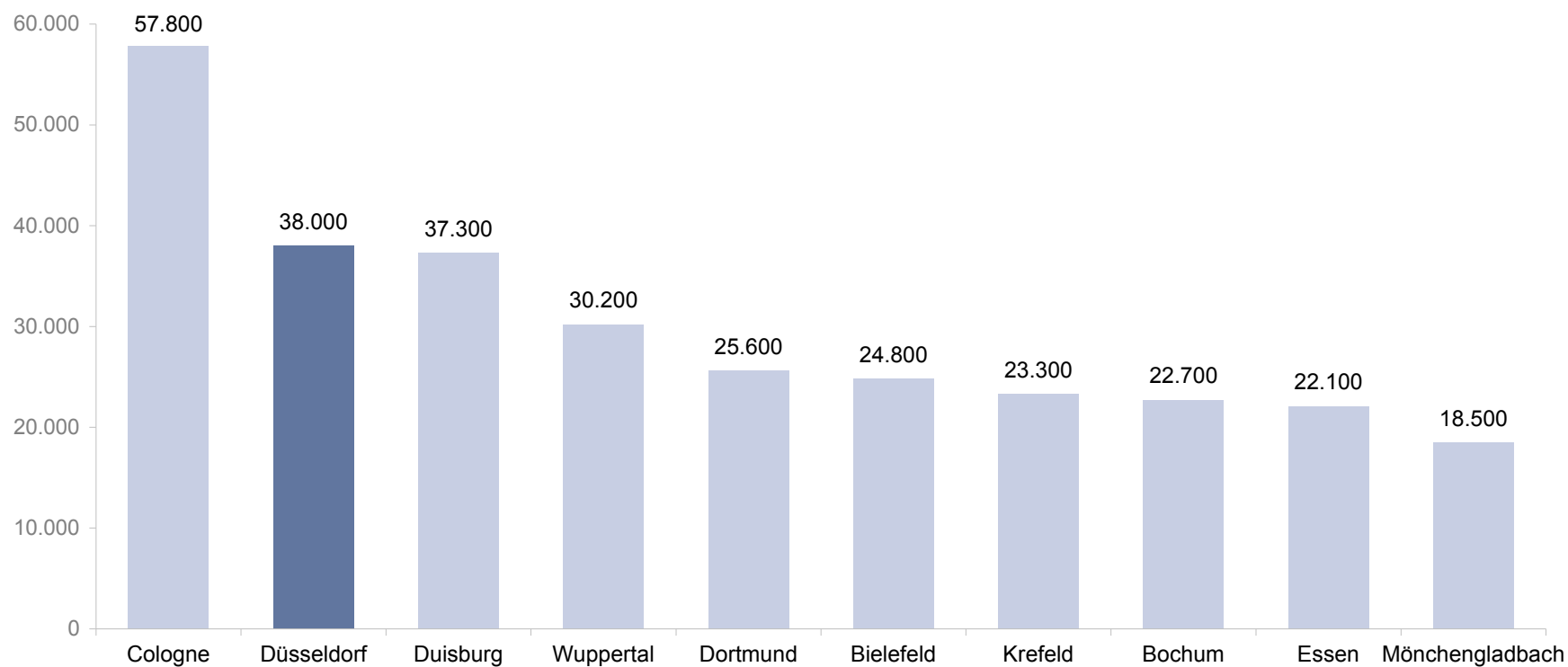
Source: Düsseldorf Statistics Office Company Register V2012 B2010, Working Group VGR Gross Value Added and Employed Persons V2013Q1 B2010 ITNRW, Statistics of Manufacturing Industry V2012Q3 B2011. * = the local total turnover is not recorded.



Industry

Düsseldorf is the second largest industrial city in North Rhine-Westphalia

Number of employed in manufacturing industry



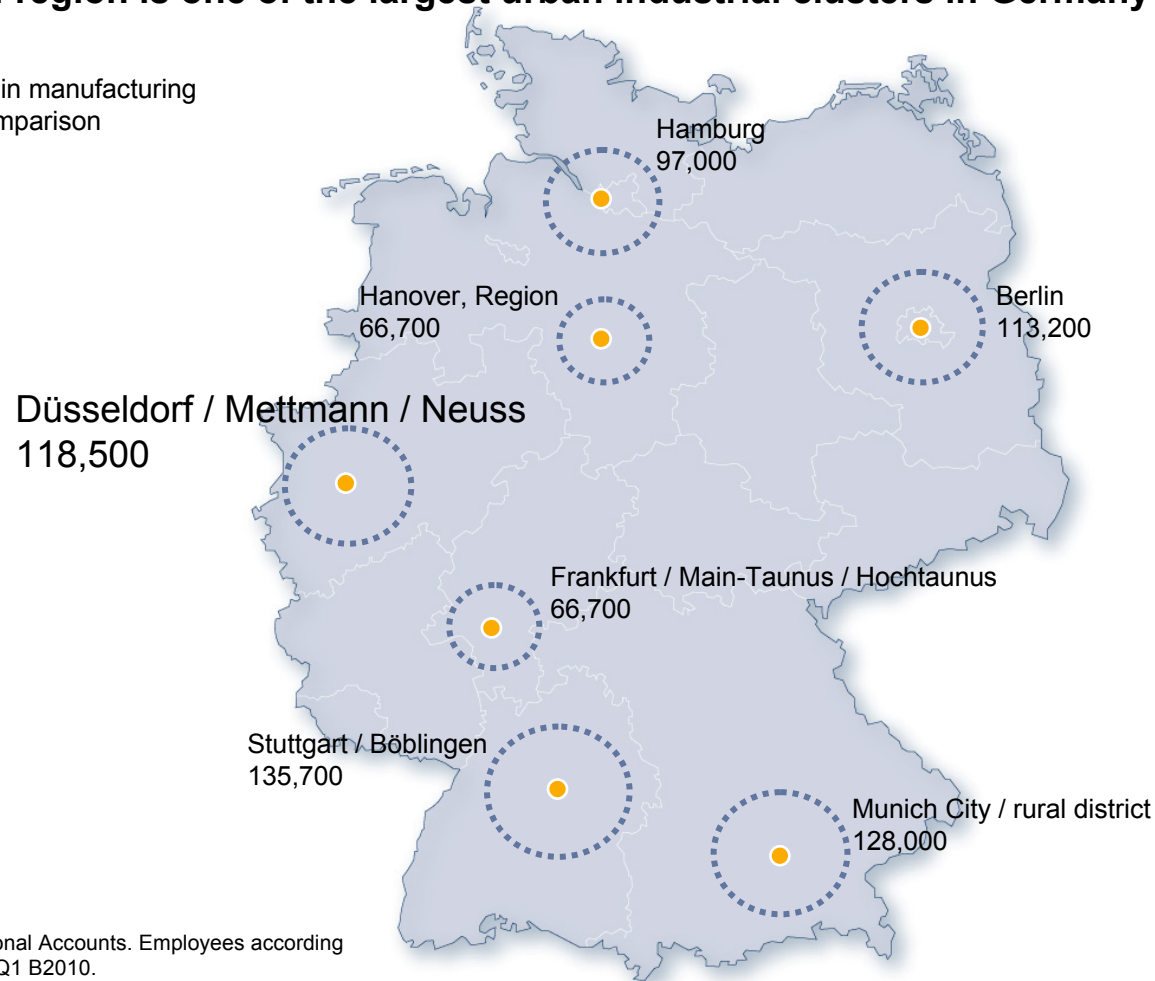
Source: Working party . National Accounts, employees according to industry sectors V2013Q1 B2010



Industry

The Düsseldorf region is one of the largest urban industrial clusters in Germany

Number of employees in manufacturing industry in regional comparison



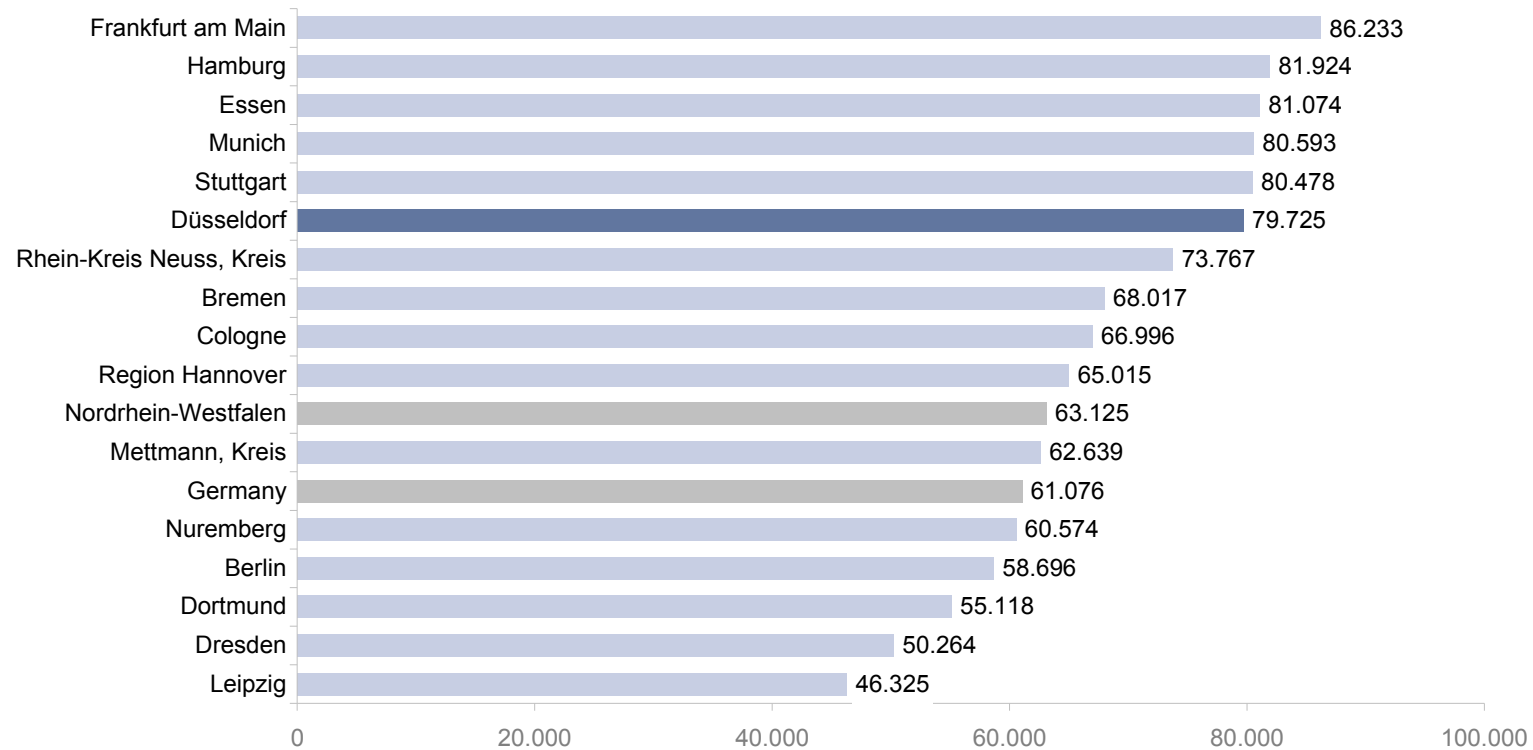
Source: Working party National Accounts. Employees according to Industrial Sectors V2013Q1 B2010.



Industry

Düsseldorf with above-average productivity in manufacturing industry

Gross value added per employee in manufacturing industry in euros



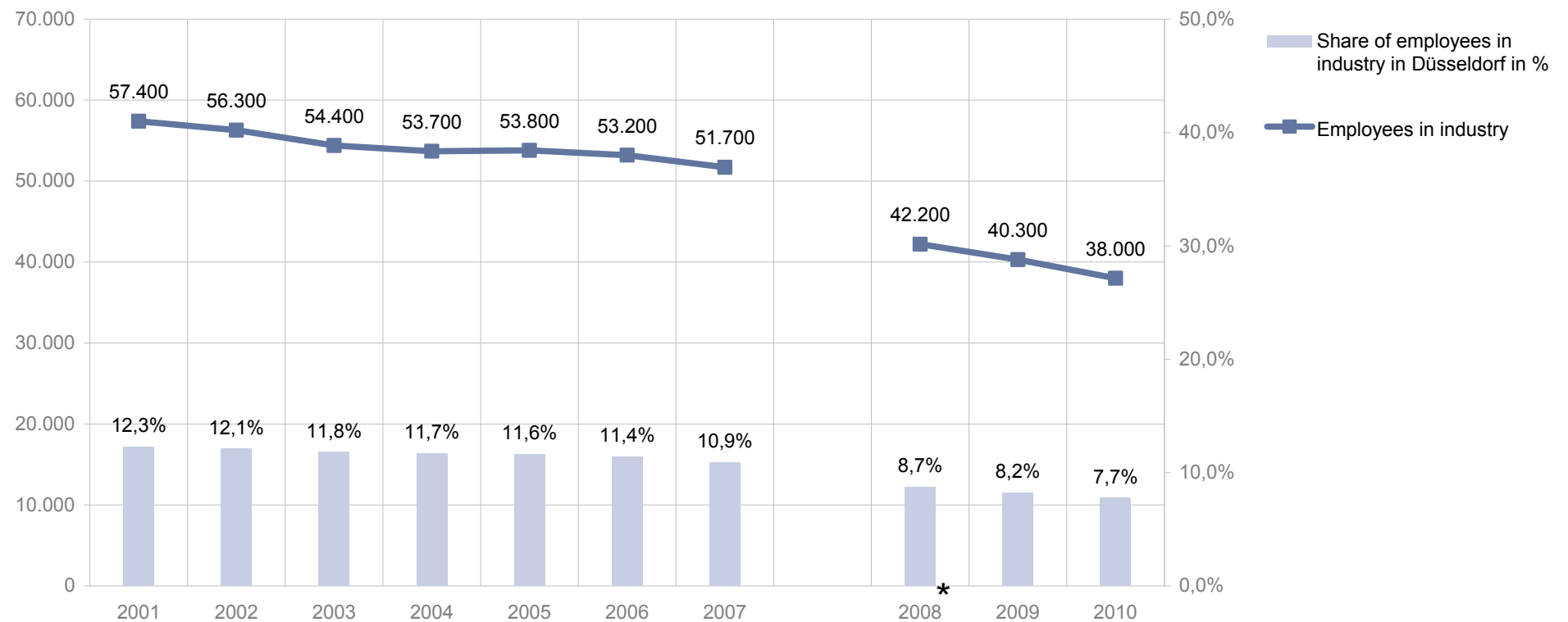
Source: Working party VGR, Gross value added according to industry sectors V2012Q4 B2010.



Industry

Moderate staff reduction in Düsseldorf's manufacturing industry

Existing level and development of employment in Düsseldorf's manufacturing industry 2001 - 2010



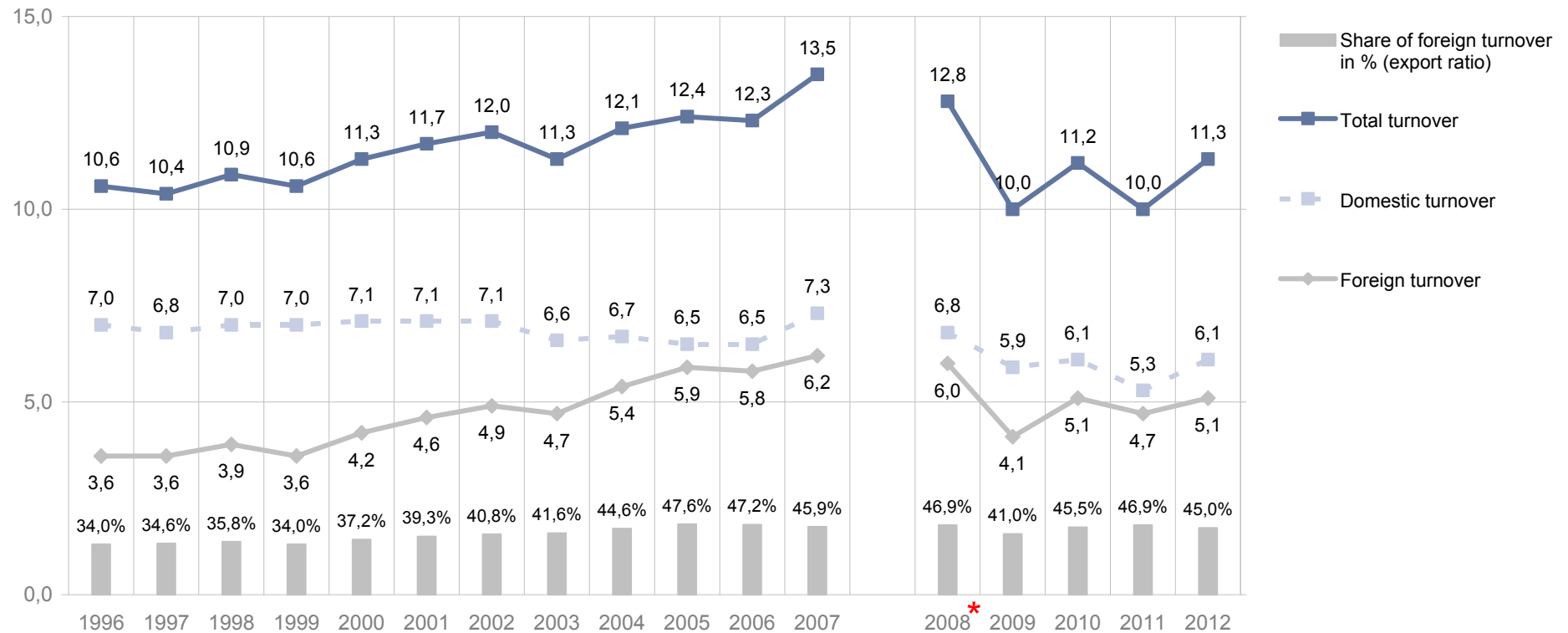
Source: Working party National Accounts, employees according to industrial sectors V2013Q1. * = From 2008 reference to the classification WZ08. By shifting some of the sectors out of the manufacturing industry, the employee numbers from 2008 cannot be compared with those of previous years.



Industry

Düsseldorf's industry has a consistently high export ratio

Development of domestic and foreign turnover in Düsseldorf's industrial sector 1996 - 2012 in € billion



Source: ITNRW, Statistics Mining and Manufacturing Industry, Companies with more than 50 employees V2013Q2. * = From 2008, reference to the classification WZ08. Due to shifting some sectors out of manufacturing industry, industry turnover figures from 2008 cannot be compared with those of previous years.



Industry

Chemicals and vehicle construction dominate industry in Düsseldorf, but central structure is broad and strong

Employees liable to pay social security contributions in Düsseldorf according to branch of manufacturing industry and energy sector

WZ08 codes	Sector	Employees liable to pay social security contributions 2012
20	Manufacture of chemical products	9.766
29-30	Vehicle construction	> 9.000 ^a
35-39	Energy/water supply/waste management	5.623
28	Mechanical engineering	5.027
24	Metal production, processing	4.529
26-27	Manuf. of electronic products and systems	3.300
10-12	Food manufacture	2.296
31-33	Other goods/system repairs	1.867
16-18	Manuf. of wood/paper/printing	1.702
25	Manuf. of metal goods	1.014
22-23	Plastics, glass, ceramics	787
13-15	Manuf. of textiles, clothing	246
19	Mineral oil processing	*
21	Manuf. of pharmaceutical products	*

Source: Federal Employment Agency V2013Q1 B2012Q2. The table shows groups from the industrial branches of manufacturing industry and energy in accordance with WZ08.

a = estimated value due to data protection. * = no information available due to data protection.



Industry

Examples of outstanding manufacturers “Made in Düsseldorf”

Company (examples)	Products
A.u.K. Müller	Electromagnetic valves
BASF	Chemical raw materials
Daimler	Sprinter plant
Eifeler Werkzeuge GmbH	High-tech coatings
Ericsson	Mobile communications, network equipment
Henkel	Detergents, adhesives, const. chemistry
Hille u. Müller (Tata Steel)	Cold-rolled steel bands
Komatsu	Construction machines
SCHMOLZ + BICKENBACH	Steel production, processing
Teekanne GmbH & Co KG	Tea production, sales
Terex Material Handling & Port Solutions AG	Crane systems
Vallourec & Mannesmann	High-tech tubing
Vodafone	Mobile communications, Network equipment
Zamek	Food

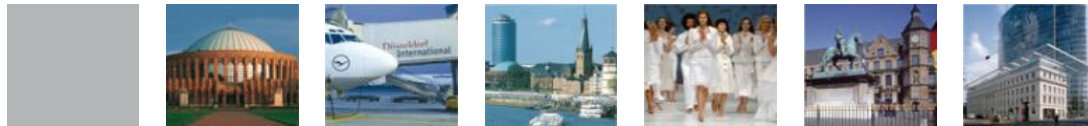
Source: Business Development Düsseldorf V2013Q2.



City of
Düsseldorf

ICT

Düsseldorf –
top location for
information and
telecommunications
technology



City of
Düsseldorf

ICT

Düsseldorf – a key ICT location

ITC-location Düsseldorf

- 1,500 ICT companies with 24,000 employees.
- Düsseldorf is the capital of the mobile telecommunications sector in Germany.
- Düsseldorf region accounts for over 50 % of domestic mobile phone sales.
- Over 50 % of all German mobile telecommunications SIM cards come from Düsseldorf.
- Dynamic ITC market: 30% of ICT companies have been founded since 2002.
- Over 30 network providers in the region.





City of
Düsseldorf

ICT

Head office of major ICT institutions in Düsseldorf

ICT institutions in Düsseldorf

Mobile Monday e.V.

Digitale Stadt Düsseldorf e.V.

Bundesverband Digitale Wirtschaft

VAF Bundesverband Telekommunikation e.V.

Gemeinschaft Fernmeldetechnik e.G.

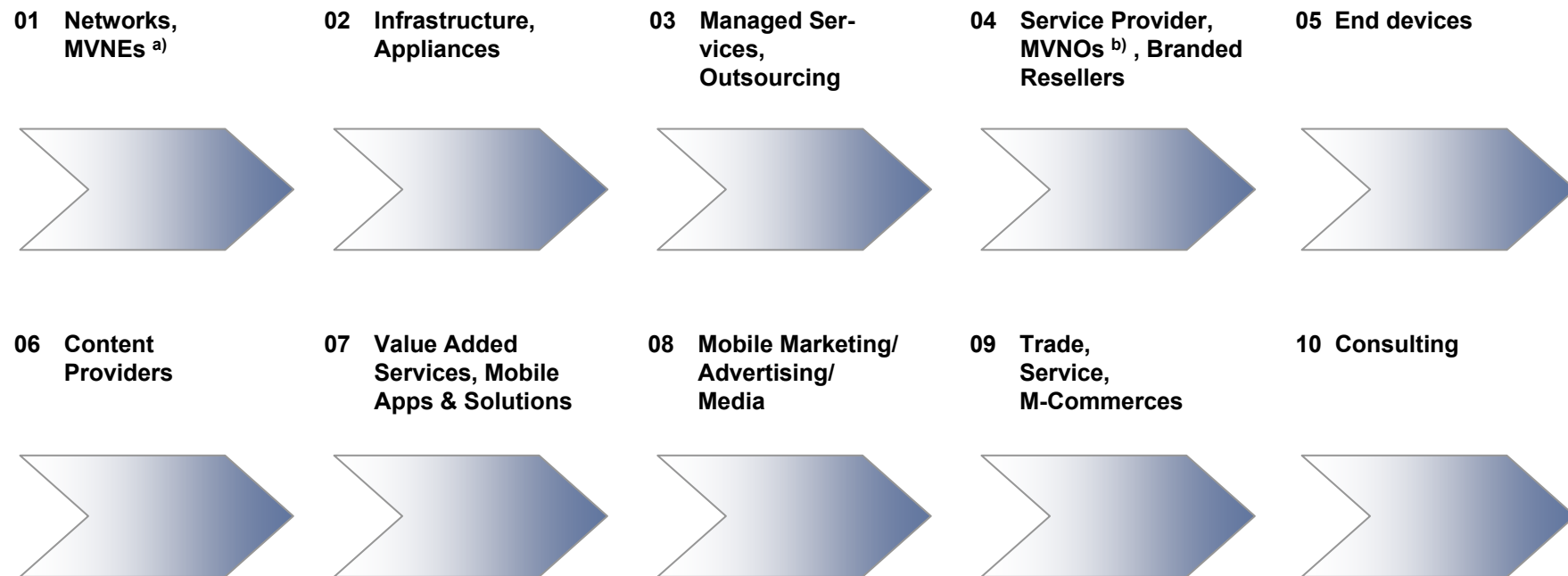


:DÜSSELDORF



ICT

Düsseldorf presents all value-added phases of the mobile communications sector



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



ICT

Top-level research in the ICT region of Düsseldorf

ICT research institutions in the region

Heinrich Heine University Düsseldorf

↳ Data centre, Centre for IT and Media, Institute for Information Technology

University of Applied Sciences Düsseldorf

↳ Institute for Media, Communication and Information Technology

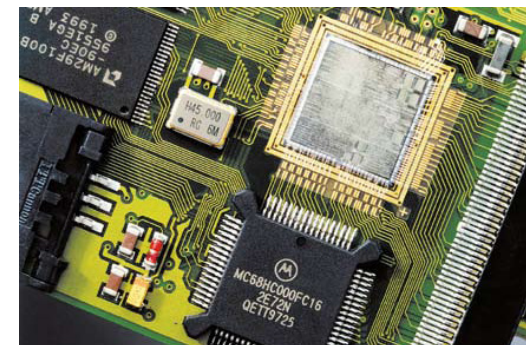
Fraunhofer Institute for micro-electronic circuits and systems

Fraunhofer Institute for software and systems technology

Fraunhofer Institute for laser technology

Institute for mobile and satellite communications

Cluster of Excellence Ultra High-Speed Mobile Information and Communication (UMIC) Research Centre

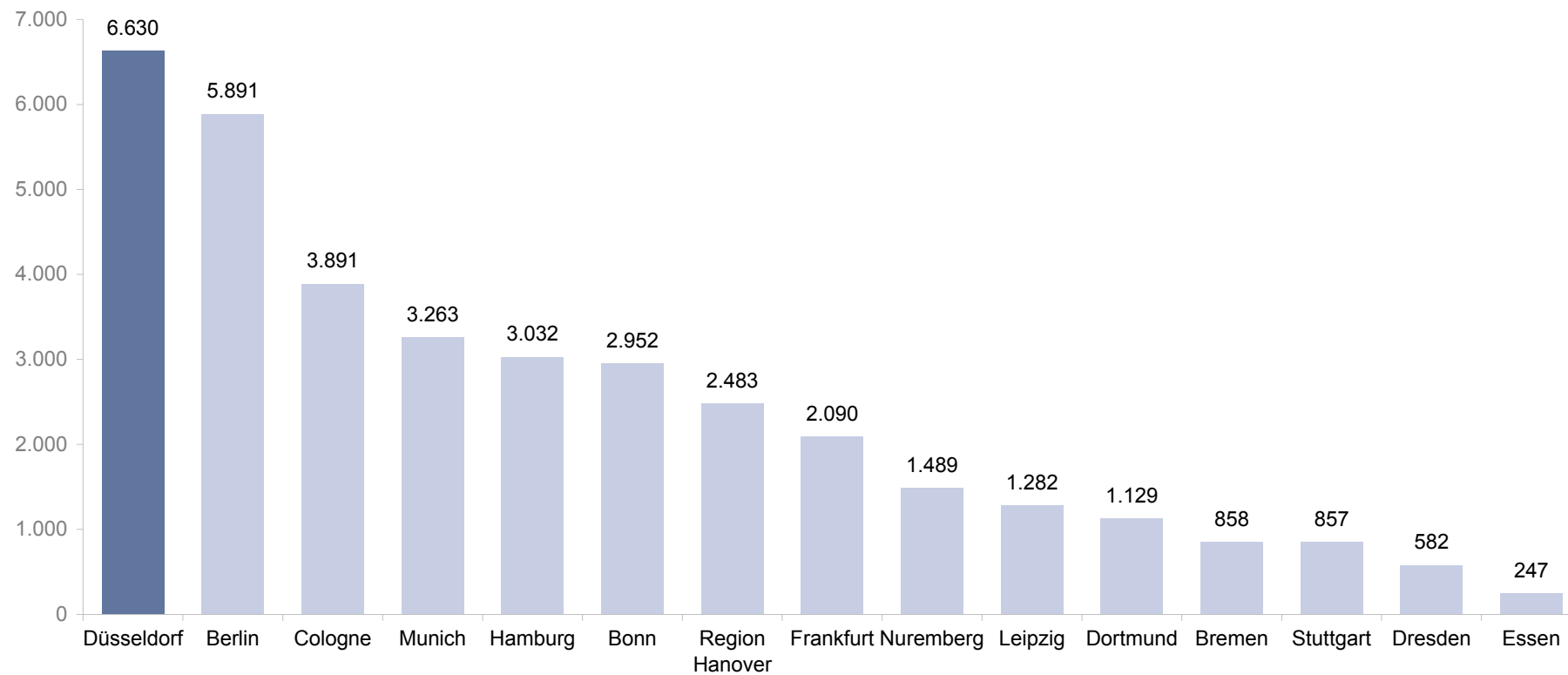




ICT

Düsseldorf – no. 1 telecommunications location in Germany

Employees liable to pay social security contributions in the telecommunications sector 2012



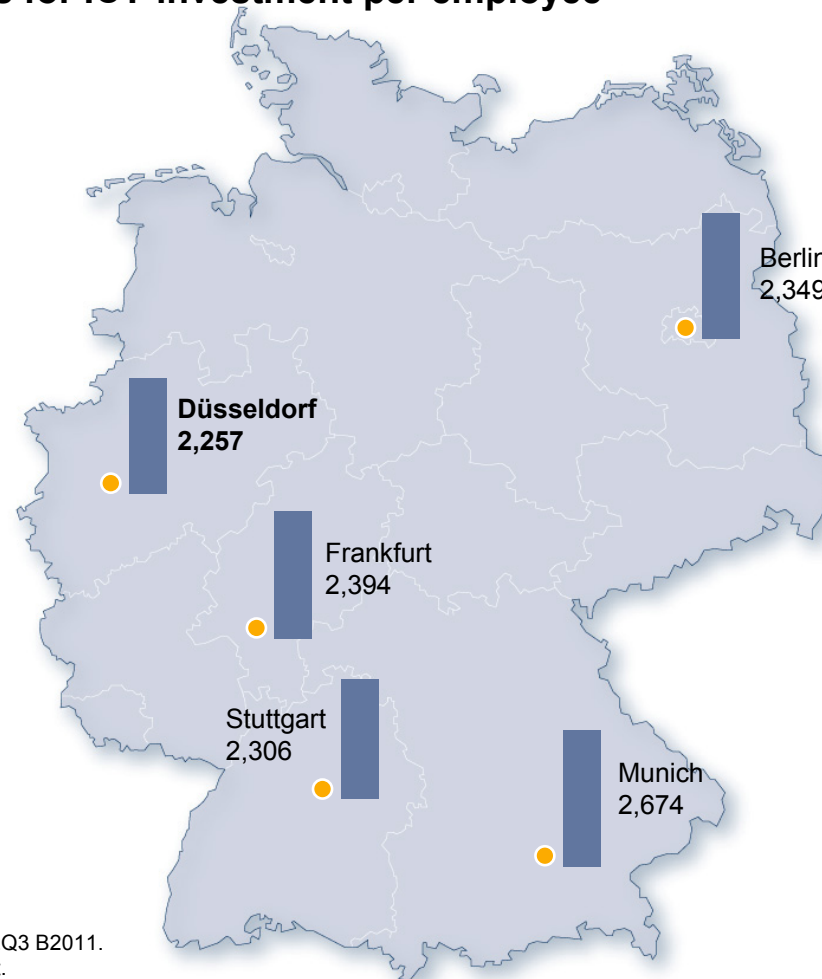
Source: Federal Employment Agency, Employees liable to pay social security contributions V2013Q1 B2012Q3. WZ08 no.: 61.



ICT

Düsseldorf under top 5 cities for ICT-investment per employee

The 5 cities with the most ICT outgoings per job in companies with up to 500 staff – figures in euros



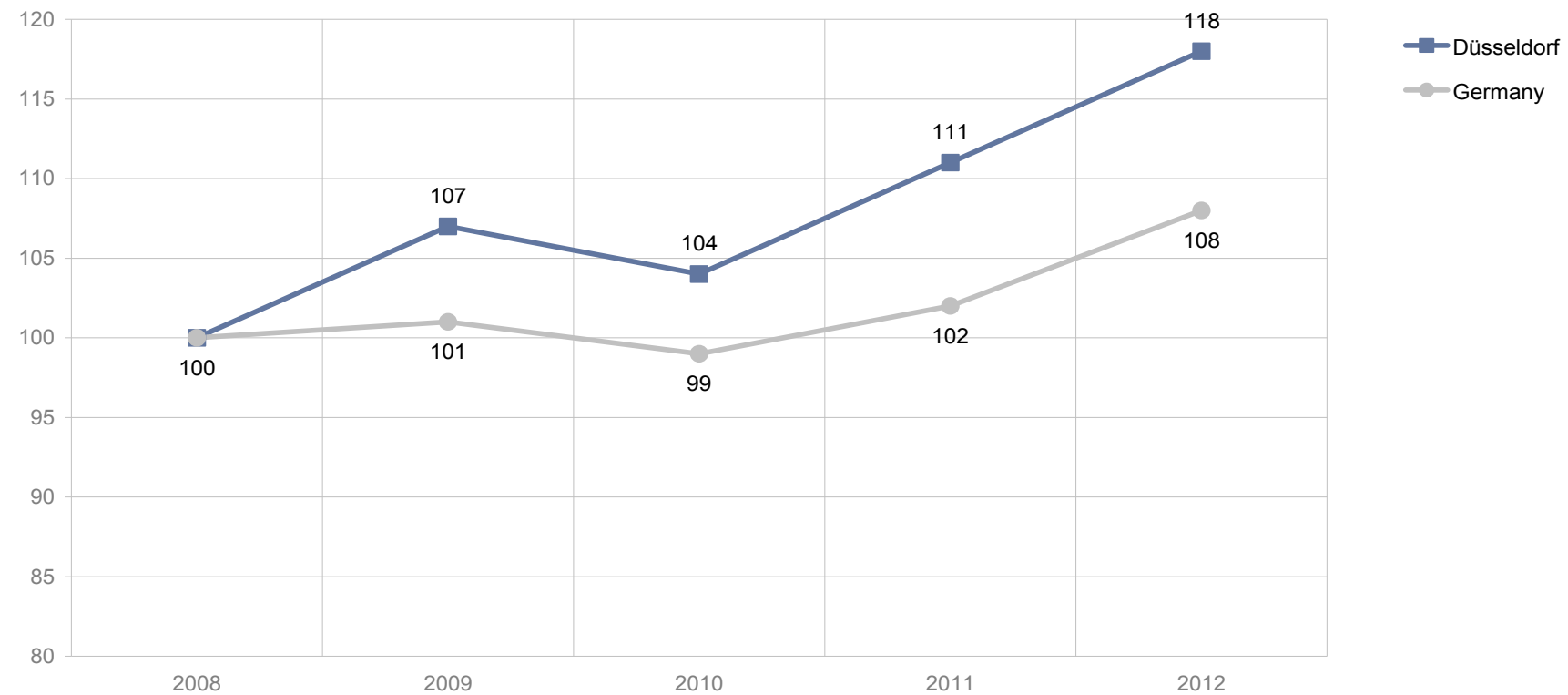
Source: Sage Software GmbH, Press release V2012Q3 B2011.
Own presentation with the 5 cities investing the most.



ICT

Above-average growth of employees in Düsseldorf ICT-Cluster

Development of Düsseldorf ITC employees in comparison with Germany 2008 – 2012 (118 = increase of 18 % since 2008)



Source: Federal Employment Agency, employees liable to pay social security contributions 2013Q1 B2012Q2. ITC-Cluster = composition of 4 and 5 figure numbers from the WZ08.



City of
Düsseldorf

Life Science

Düsseldorf – competence in life sciences



Life Science

Competence Cluster Regio BioRiver

Life Science Networks in the Düsseldorf region

LifeScienceNet Düsseldorf (Düsseldorf region):

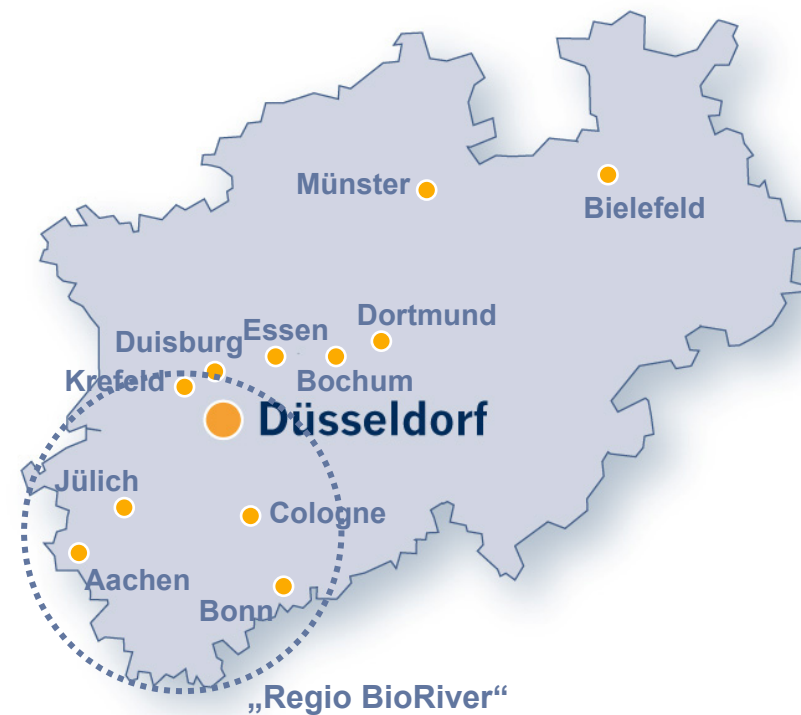
↳ www.lifescience-dus.de

BioRiver (Cluster of the Rhineland region):

↳ www.bioriver.de

Bio.NRW (Nordrhine-Westphalia region):

↳ www.bio.nrw.de





City of
Düsseldorf

Life Science

Life Sciences in Düsseldorf

Life Sciences location Düsseldorf

- Heinrich Heine University is one of the leading specialists in German life sciences research
- 5,493 students registered on courses in life science-related subjects
- Over 50 % of the turnover of quoted biotechnology companies in Germany is achieved by Heinrich-Heine University spin-off companies.
- 94 highly innovative life science companies in the region
- 5,000 employees at biotechnology companies in BioRiver region
- 20,000 employees at pharmaceutical companies in the Rhineland region



Source: Business Development Düsseldorf V2011Q2



City of
Düsseldorf

Life Science

Innovative Life Science Research Institutes in Düsseldorf

Life Science Research Institutes in Düsseldorf

Life Science Center

↳ Area 21,000 m², near Heinrich Heine University

University Clinic of Heinrich Heine University

Biological-Medical Research Centre BMFZ

German Diabetes Centre DDZ

Graduate School BIOSTRUCT

Graduate Cluster Industrial Biotechnology



Source: Business Development Düsseldorf V2011Q2



City of
Düsseldorf

Advertising

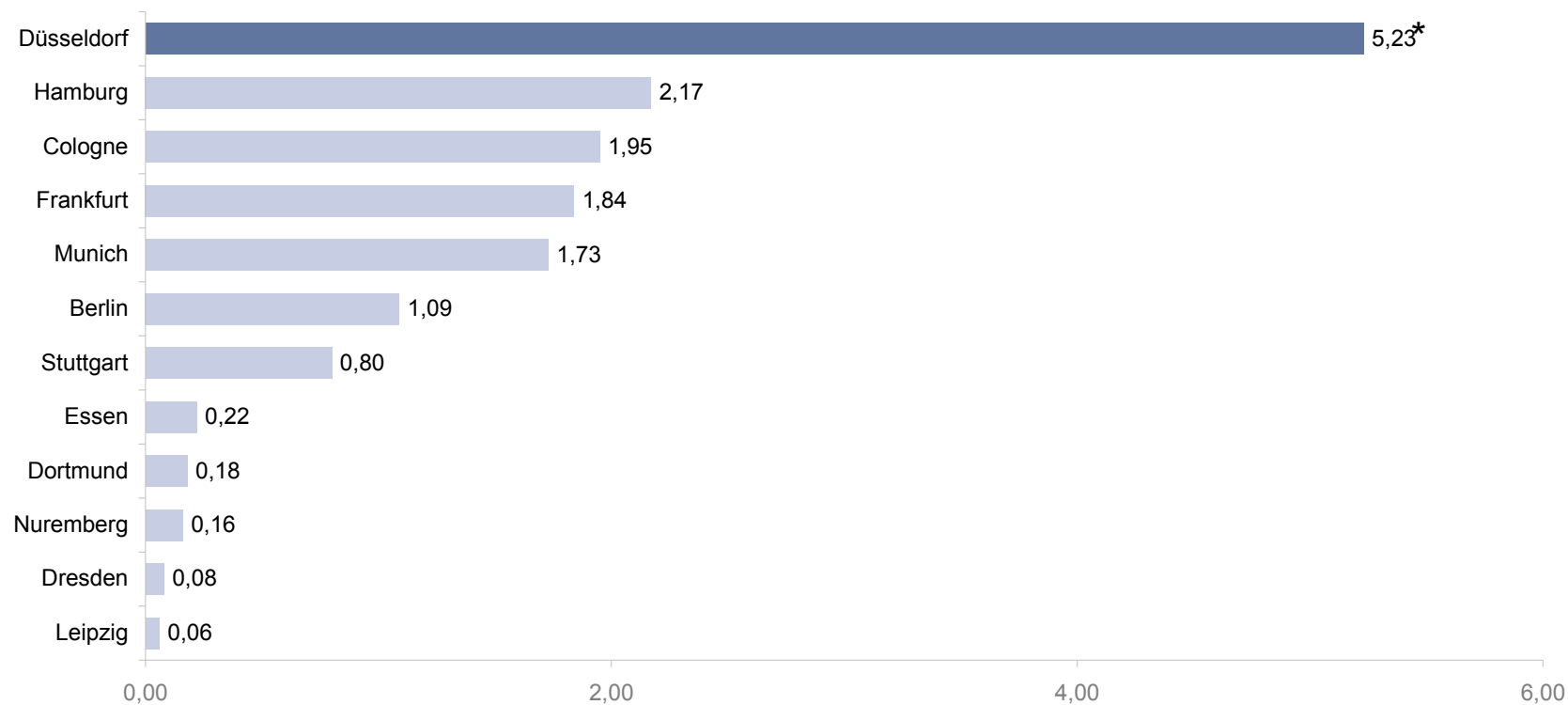
Düsseldorf –
advertising
location



Advertising

Düsseldorf advertising sector top of German city rankings on turnover figures

Taxable turnover of the advertising sector in selected German cities in € billion



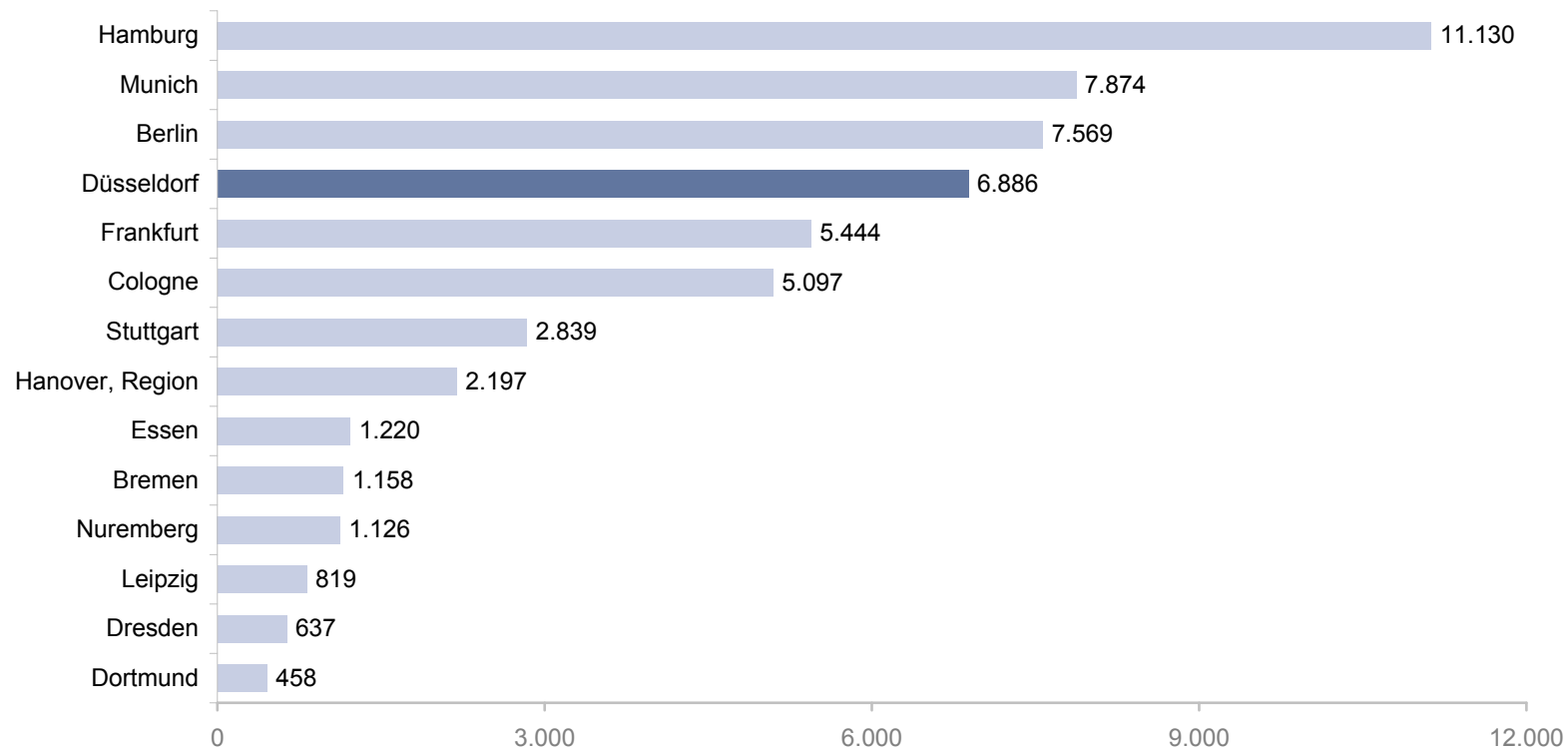
Source: ITNRW, VAT Statistics V2013Q3 B2011Q4. WZ08-no.: 731. * = own estimate.



Advertising

Düsseldorf is one of the most employment-intensive advertising cities in Germany

Number of employees liable to pay social security contributions in the advertising sector in selected German cities



Source: Federal Employment Agency, employees liable to pay social security contributions V2013Q1 B2012Q2. WZ08-no: 731.



City of
Düsseldorf

Advertising

Advertising location Düsseldorf – the Who's Who of the sector, high training standards and powerful institutions

Advertising and media agencies in Düsseldorf (examples in alphabetical order)

BBDO
Grey
McCann Erickson
MEC
MediaCom
Ogilvy & Mather
Saatchi & Saatchi
Scholz & Friends

Creative institutions in Düsseldorf (listed in alphabetical order)

Art Directors Club Düsseldorf
DAMK Düsseldorfer Akademie für Marketing-Kommunikation
Deutscher Marketing Verband e.V.
Düsseldorfer Marken Award
EMBA - Europäische Medien- und Businessakademie
KreativKader Düsseldorf
Mediadesign Hochschule für Design und Information
PSI Messe für Werbeartikel

Source: Business Development Office Düsseldorf Monitoring V2012Q3.



City of
Düsseldorf

Consultancy

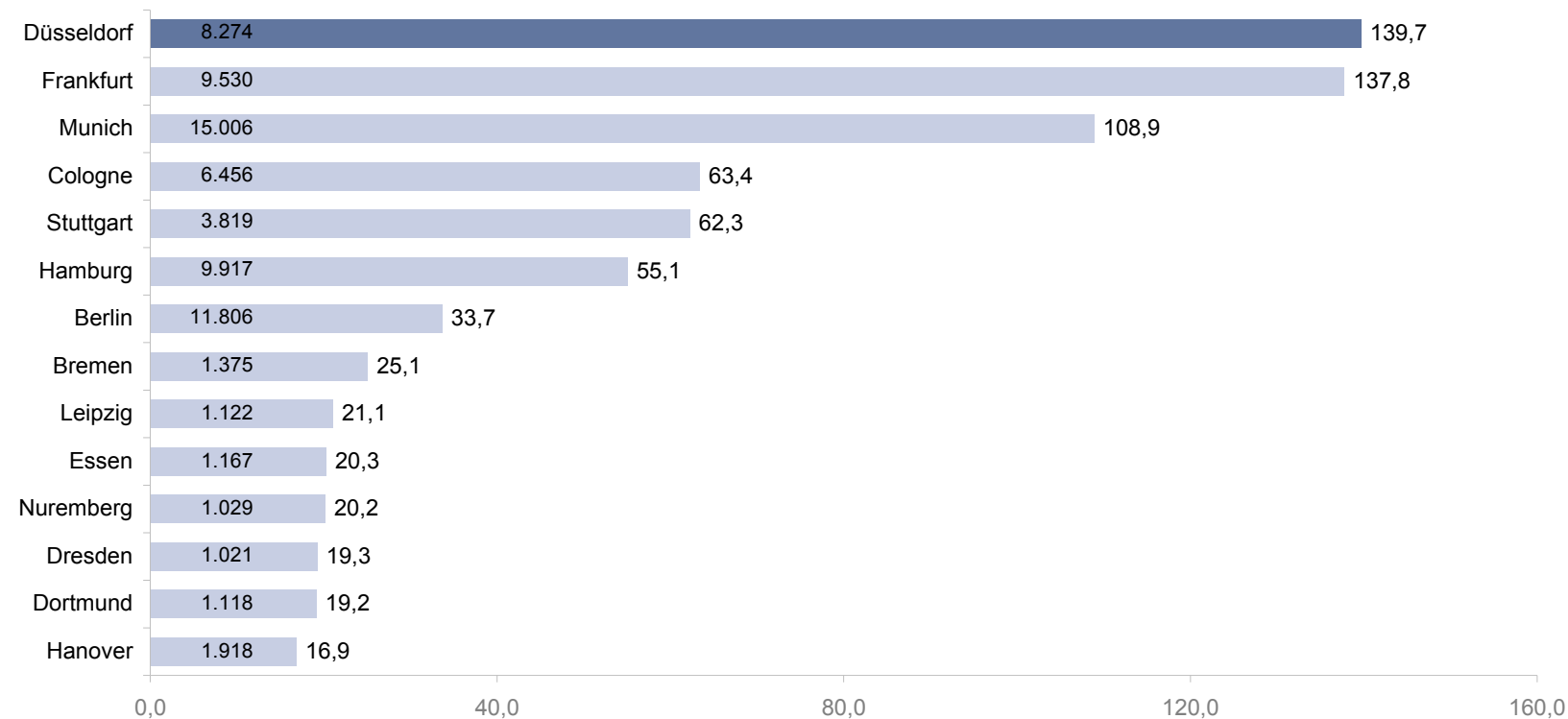
Düsseldorf –
the management
consultant location



Consultancy

Düsseldorf has the highest job density in the consultancy sector in Germany

Employees liable to pay social security contributions in management consultancy in absolute terms and per 10,000 inhabitants



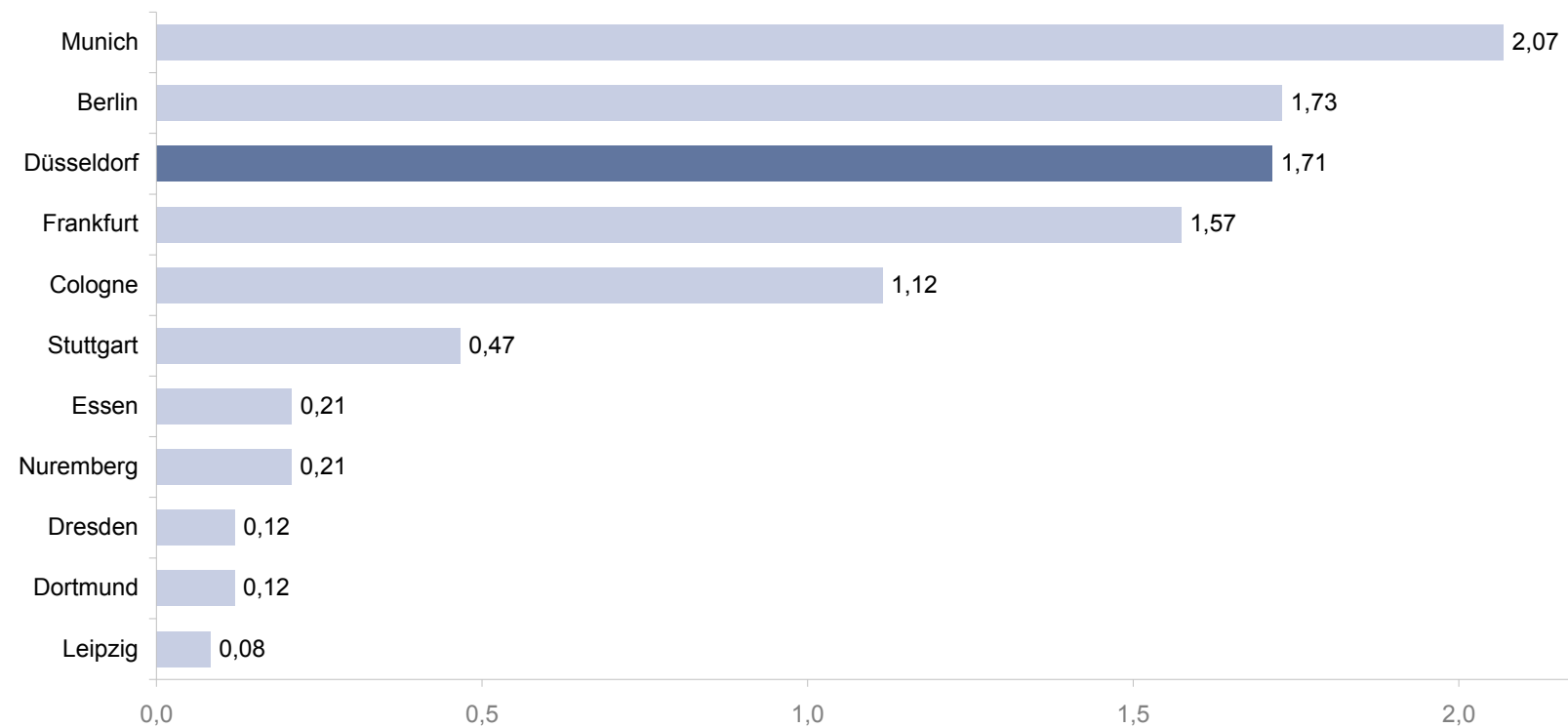
Source: Federal Employment Agency, employees liable to pay social security contributions V2013Q1 B2012Q2. WZ08-Nr: 702. Federal Statistics Office, Inhabitants B2011Q4.



Consultancy

Düsseldorf's consultancy sector is one of the top three in Germany based on turnover

Taxable turnover in consultancy sector in selected German cities in € billion



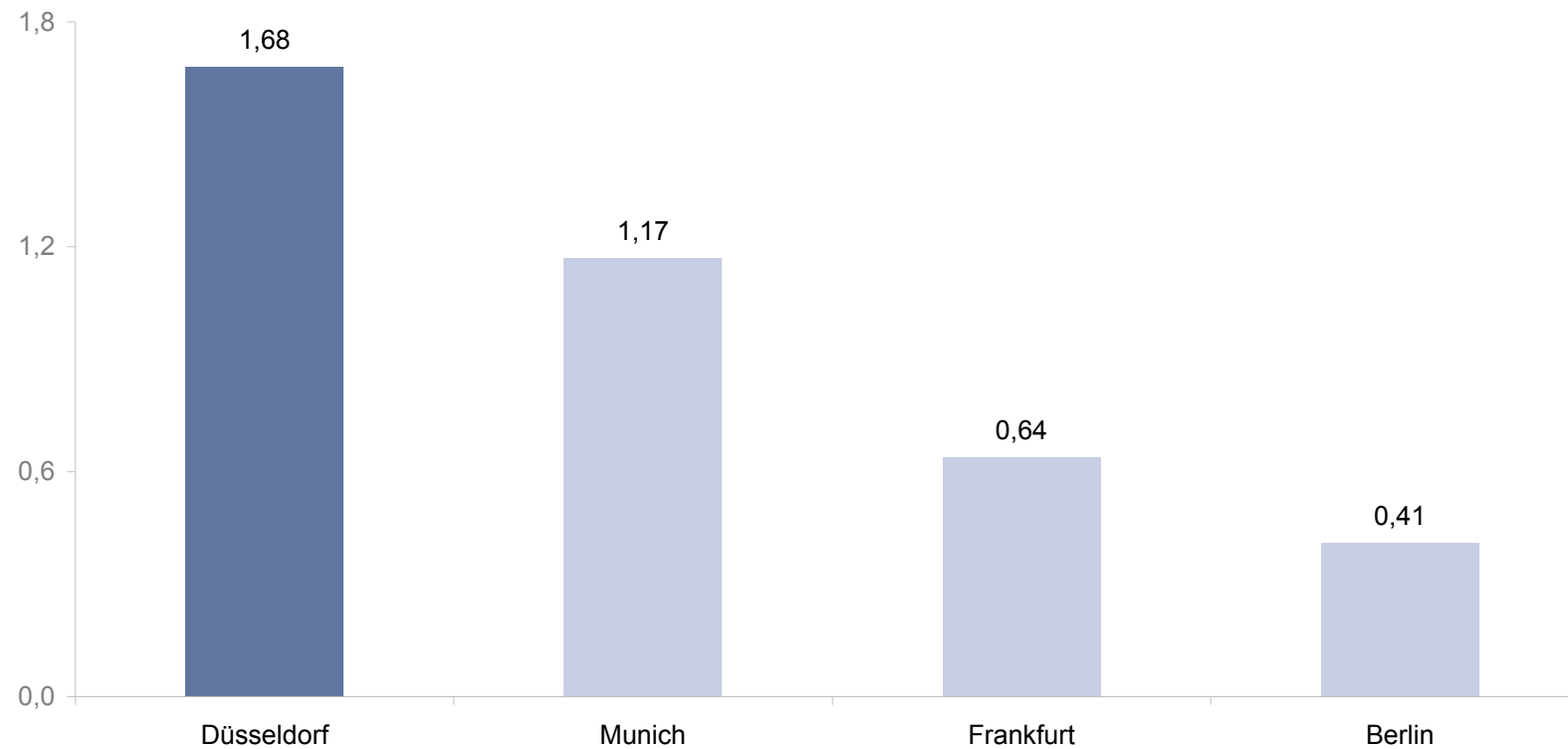
Source: State Statistics, VAT Statistics V2013Q3 B2011. WZ08-no: 702.



Consultancy

Düsseldorf – location with the top consultancy firms in Germany

Turnover of top 25 consultancy firms in Germany in € billion



Source: Lünendonk GmbH, Lünendonk list V2012Q2 B2011. In the case of a head office split, the turnover was distributed amongst the cities correspondingly.



City of
Düsseldorf

Consultancy

Düsseldorf – location of the international who's who in management consultancy

Management consultancies in Düsseldorf (examples in alphabetical order)

Accenture GmbH
A.T. Kearney GmbH
Bain & Company Germany Inc.
BearingPoint GmbH
Booz & Company GmbH
Deloitte Consulting GmbH
Ernst & Young GmbH
FischerAppelt
Grayling
Horváth AG (Horváth & Partners Gruppe)
IBM Global Business Services
Ketchum Pleon

Management consultancies in Düsseldorf (examples in alphabetical order)

Kienbaum Management Consultants GmbH
Kommpassion
KPMG AG WPG
Lewis PR
Management Engineers GmbH & Co. KG
McKinsey & Company Inc.
Mercer Deutschland GmbH
The Boston Consulting Group GmbH
Oliver Wyman Group
PricewaterhouseCoopers AG WPG
Roland Berger Strategy Consultants GmbH
Steria Mummert Consulting AG

Source: Lünendonk GmbH, Lünendonk list V2012Q2 B2011. Management consultancies with branch in Düsseldorf.



City of
Düsseldorf

Auditing/tax consultancy

Düsseldorf -
important location for
auditing/
tax consultancy



Auditing/tax consultancy

Düsseldorf – a prominent auditing and tax consultancy location

Auditing and tax consultancy location Düsseldorf at a glance

- Registered office of “Wirtschaftsprüferkammer NRW” (state supervised chamber of auditors and public accountants)
- Registered office of “Steuerberaterkammer Düsseldorf” (state supervised chamber of tax consultants)
- Registered office of “Institut der Wirtschaftsprüfer in Deutschland e.V.” (German Auditors’ Institute)
- Registered office of “Steuerberaterverband Düsseldorf e.V.” (Tax Consultants’ Association Düsseldorf)
- 883 auditing firms/tax consultancies (company register)
- 9,241 employees liable to pay social security contributions in auditing/tax consultancy
- 128 trainees as tax clerks

Source: Business Development Office Düsseldorf, Monitoring V2012Q3. Statistical Office Düsseldorf, Company Register V2012Q2. Federal Employment Agency V2012Q1 B2011Q2. WZ08-no. 692.



Auditing/tax consultancy

Highest share of employees in auditing/tax consultancy in city comparison

Employees liable to pay social security contributions in auditing/tax consultancy and their percentage share in Düsseldorf

Cities	Employees liable to pay social security contributions in auditing/tax consultancy 2012	Local share in %
Düsseldorf	9.241	2,5%
Frankfurt	8.539	1,7%
Stuttgart	5.898	1,6%
Munich	11.025	1,5%
Hamburg	11.249	1,3%
Essen	2.511	1,1%
Cologne	5.292	1,1%
Hanover, Region	4.855	1,1%
Berlin	12.456	1,0%
Nuremberg	2.811	1,0%
Leipzig	2.265	1,0%
Dresden	2.369	1,0%
Dortmund	2.015	1,0%
NRW	58.670	1,0%
Bremen	2.286	0,9%
Germany	262.346	0,9%

Source: Federal Employment Agency : Employees liable to pay social security contributions V2013Q1 B2012Q2. WZ08-no.: 692.



City of
Düsseldorf

Auditing/tax consultancy

Renowned auditors and tax consultants present in Düsseldorf

Düsseldorf auditors/tax consultancies (examples in alphabetical order)

BDO AG

Clifford Chance

CMS Hasche Sigle

Deloitte & Touche GmbH

Ebner Stolz Münning Bachem GmbH & Co KG

Ernst & Young GmbH

Heuking Kühn Lüer Wojtek

Düsseldorf auditing/tax consultancies (examples in alphabetical order)

KPMG AG

PricewaterhouseCoopers AG

Rölfs Business Services GmbH

Taylor Wessing

Verhülsdonk & Partner

Warth & Klein Grant Thornton AG

WIBERA Wirtschaftsberatung AG

Source: Business Development Düsseldorf, Monitoring V2012Q3. Tax Consultants' Chamber Düsseldorf V2012Q3.



City of
Düsseldorf

Finance

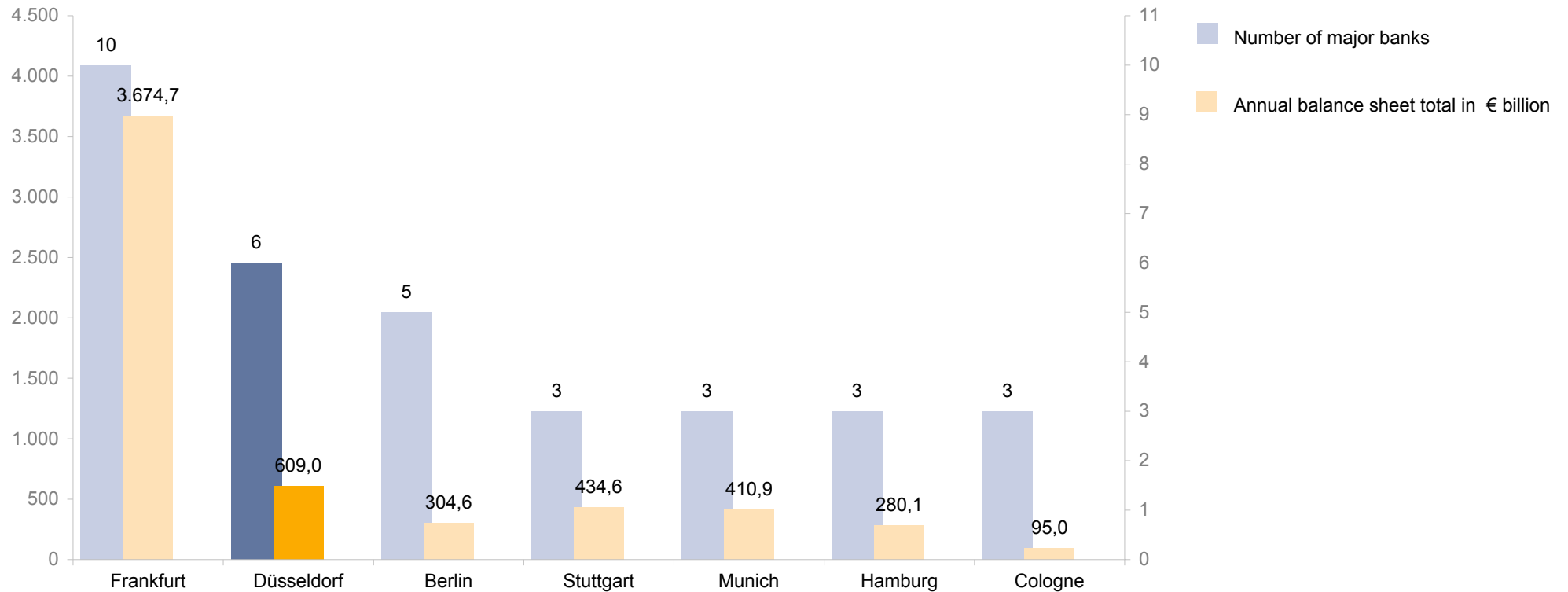
Düsseldorf -
important
finance location



Finance

Düsseldorf – second largest banking location in Germany

Number and annual balance sheet total of the largest banks with head office in the location



Source: DIE WELT, Top 50 Banks in Germany V2010Q3.



Finance

Düsseldorf – strong presence of major German banks

Head offices of German banks (according to balance sheet total)

Portigon AG
NRW-Bank
WGZ-Bank-Gruppe
IKB Deutsche Industriebank
Deutsche Ärzte- und Apothekerbank
Stadtsparkasse Düsseldorf
Sparda-Bank West
PSD Bank Düsseldorf
Kreissparkasse Düsseldorf

German branch offices (examples in alphabetical order)

Commerzbank AG
Deutsche Bank AG
Deutsche Genossenschafts-Hypothekenbank
Deutsche Hypo
Deutsche Postbank AG
Eurohypo AG
HSH Nordbank
HypoVereinsbank UniCredit Bank AG
WL Bank AG

- 119 listed credit and financial services institutions under federal supervision (BaFin)

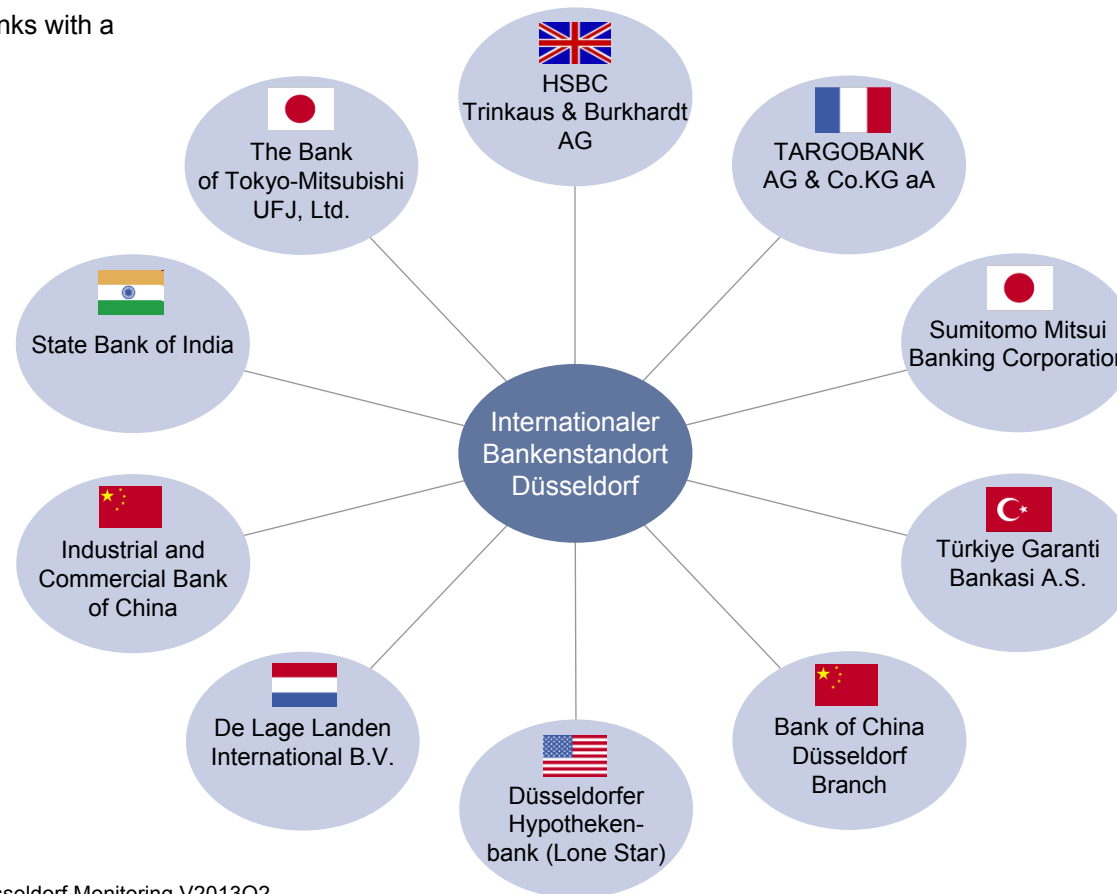
Source :DIE WELT, Top 50 banks in Germany V2010Q3. Düsseldorf Manager 2/2010. Interim Report 2012 der Portigon AG.



Finance

Banking location Düsseldorf enjoys international confidence

Examples of international banks with a presence in Düsseldorf



Source: Business Development Düsseldorf Monitoring V2013Q2, Bundesanzeiger V2012Q3



City of
Düsseldorf

Finance

Düsseldorf – Financial Centre for Private Banks

Private banks in Düsseldorf (examples in alphabetical order)

Bank Julius Bär
Bankhaus Lampe KG
Bankhaus Werhahn KG
Berenberg Bank
BHF BANK
Credit Suisse
Delbrück Bethmann Maffei
DZ Privatbank

Private banks in Düsseldorf (examples in alphabetical order)

Hauck & Aufhäuser
M.M. Warburg
Merck Finck & Co
Mizuho Corporate Bank Ltd.
Sal. Oppenheim jr. & Cie. KGaA
UBS Deutschland AG
Walser Privatbank AG
Weberbank

Source: Business Development Düsseldorf V2011



Finance

Düsseldorf Stock Exchange

Features of Düsseldorf Stock Exchange

- Second most important stock exchange in Germany
- € 60 billion annual turnover
- 72 banks and 15 brokerage firms as market participants
- Electronic trading platform QUOTRIX, as a result longest stock exchange opening hours (8 am – 11 pm)
- QUALITY TRADING – TÜV certified trading
- QUALITY TRADER CLUB as premium service for investors, around 8000 members
- Focus on advisory services for stock exchange newcomers
- Regular information meetings for the “advanced” members
- Trading supported by state-of-the-art technology (automatic quotations, limit control systems)
- Midmarket – Special service for medium-sized companies

Source: www.boerse-duesseldorf.de V2011



City of
Düsseldorf

Insurance

Düsseldorf -
insurance
industry location



Insurance

Düsseldorf – important insurance industry location in Germany

Insurance industry location Düsseldorf

- 27 insurance institutions are members of German Insurance Association (GDV)
- 23 insurance companies are listed with the Federal Financial Supervisory Authority (BaFin)

The largest Düsseldorf insurance companies (listed in alphabetical order)

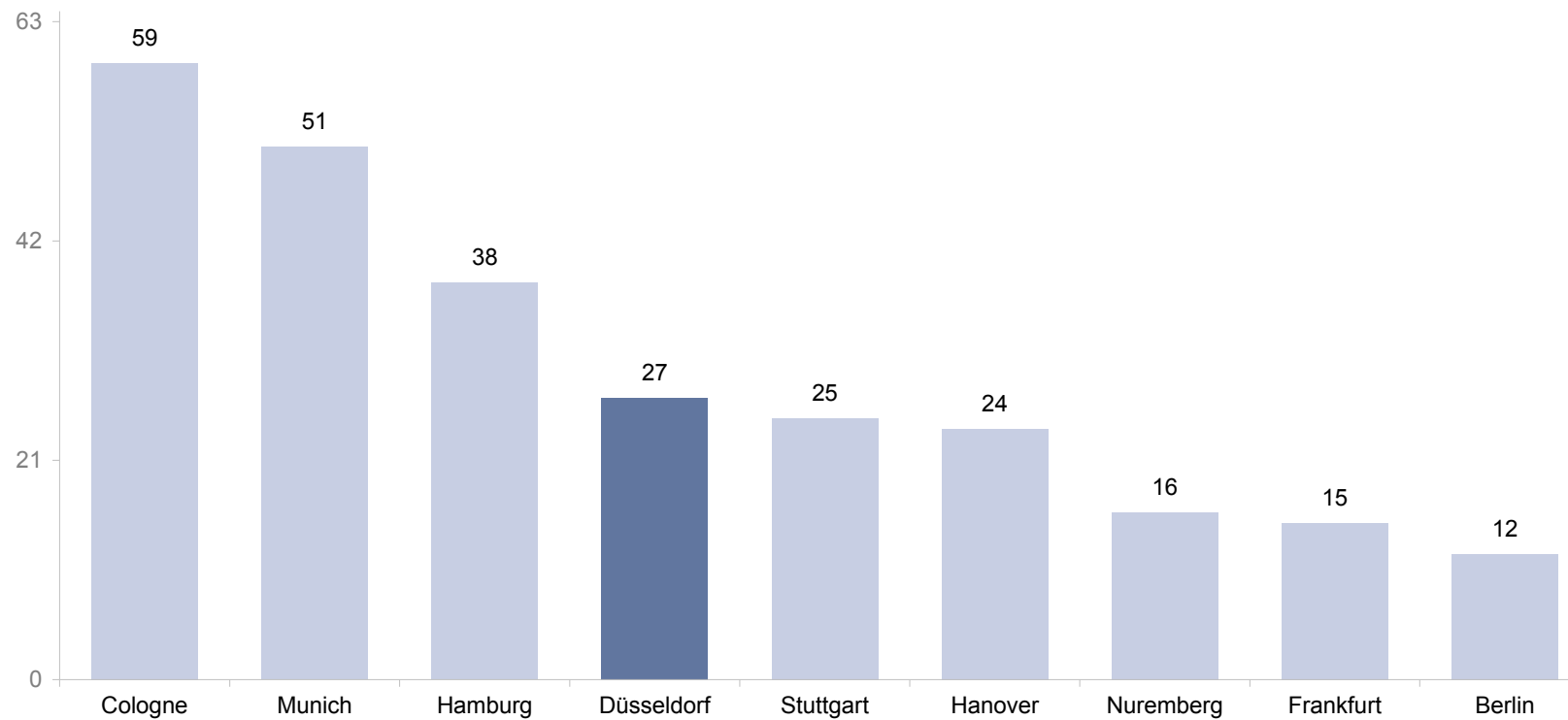
ARAG
CHUBB Insurance
Deutsche Rückversicherung
ERGO Versicherung
Interlloyd
Mitsui Sumitomo
ÖRAG
Provinzial Rheinland Versicherung
PRUDENTIA
S DirektVersicherung
Vorsorge Lebensversicherung



Insurance

Düsseldorf has the fourth largest number of insurance companies in Germany

Member companies in German Insurance Association GDV



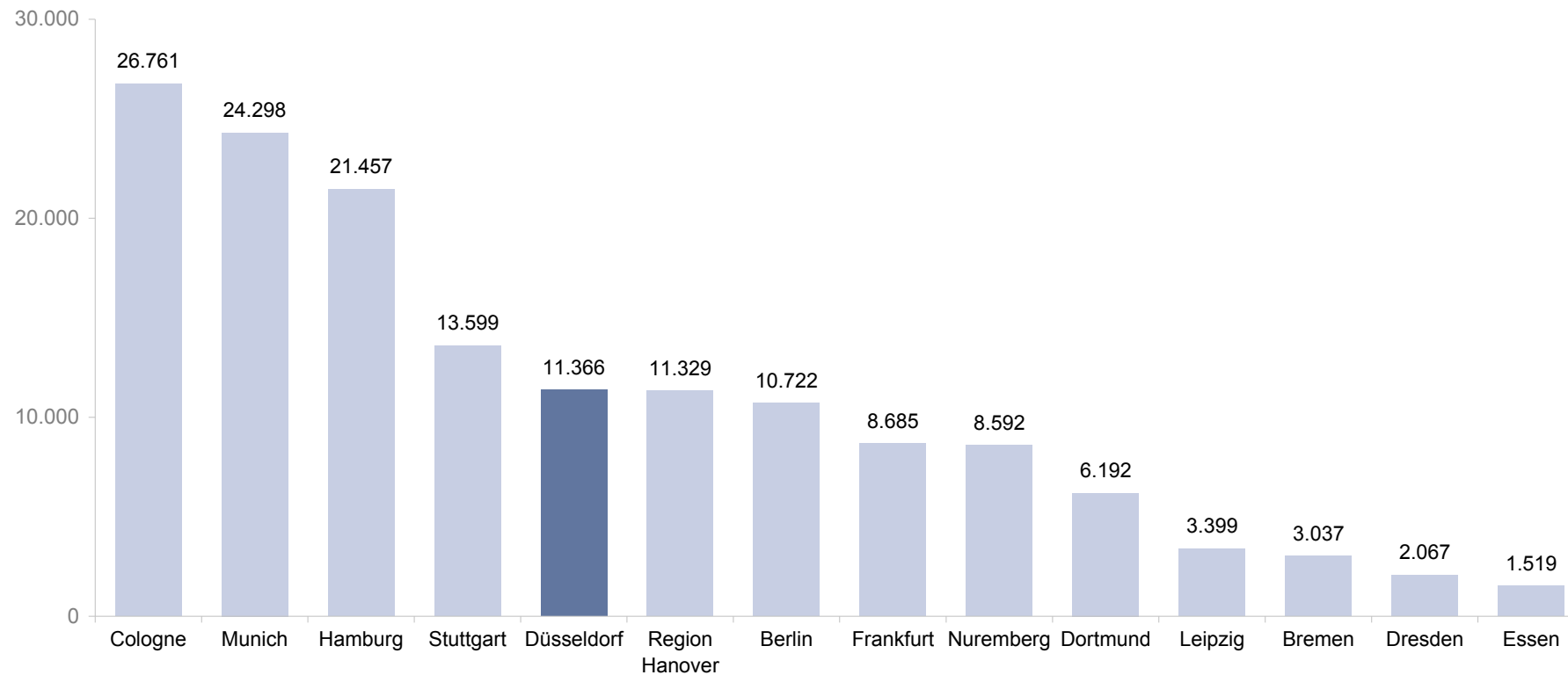
Source: GDV, Gesamtverband der deutschen Versicherungswirtschaft e.V. V2011Q2



Insurance

Düsseldorf – insurance location with large number of employees

Employees liable to pay social security contributions in the insurance business



Source: Federal Employment Agency. Employees liable to pay social security contributions in sectors 65 & 662 according to WZ08 V2013Q1 B2012Q2.



City of
Düsseldorf

Real estate

Düsseldorf –
top real estate
location



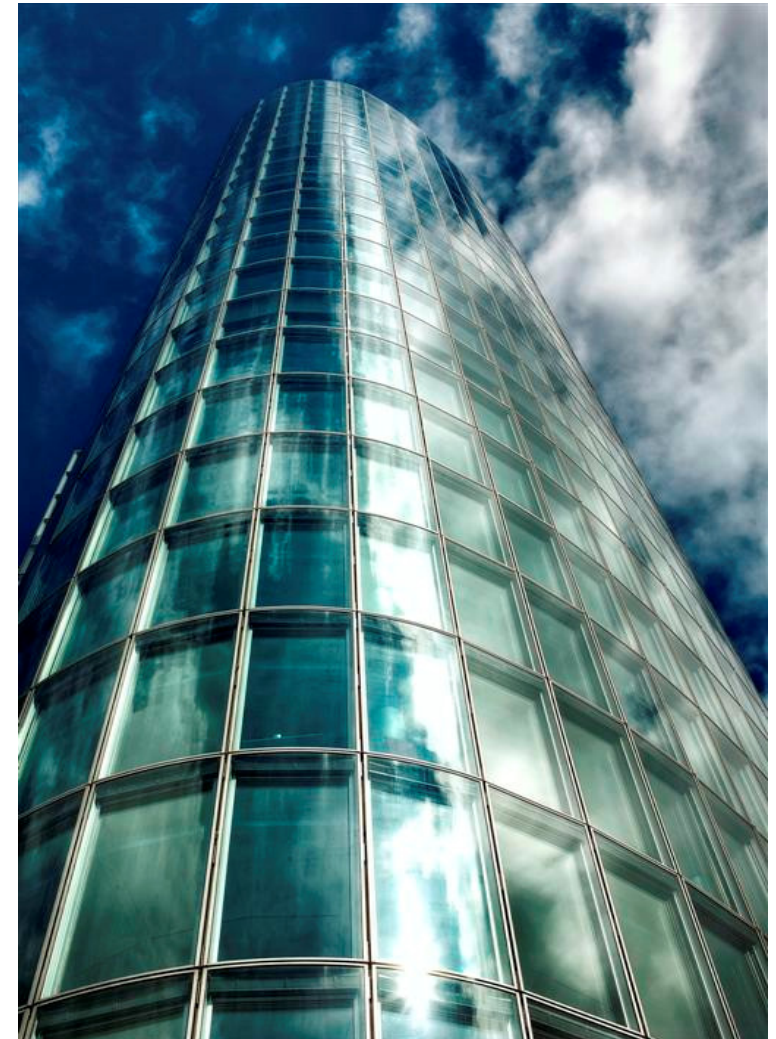
Real estate

Düsseldorf – top real estate location

Real estate location Düsseldorf

- One of the largest supplies of office space in Germany (9.02 million m²)
- Stable office market, highly attractive for investors
- Fast availability of office space
- Many top architects' offices based here. Examples: HPP, Ingenhoven Architects, SOP Architekten, Kai 18, Petzinka & Pink, RKW, Eller+Eller Architekten
- Sufficient office space in reserve
- Chamber of Architects for North Rhine-Westphalia based here

Source: Business Development Düsseldorf V2011H1





City of
Düsseldorf

Real estate

Düsseldorf – a stomping ground for world-famous architects

Architects	Real estate
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: Business Development Düsseldorf V2011H1



Real estate

Award-winning architecture in Düsseldorf

Property	Award
Stadttor	MIPIM Award Business Center
Victoria Tower	Under the top 3 MIPIM Award Business Center
Sevens	MIPIM Award Shopping Center
Stadtwerke	Under the top 3 MIPIM Award Business Center
Spherion	Office of the year (femb)
Stadtwerke	Facility Management Award
Brücke im Medienhafen	NRW Prize from BDA (German Architects Assoc.)



Source: Business Development Düsseldorf V2011H1



City of
Düsseldorf

Quality of life

Düsseldorf –
city with a high
quality of life



City of
Düsseldorf

Quality of life

Düsseldorf – world class city to live and work in

The 6 cities with the highest “quality of life” worldwide



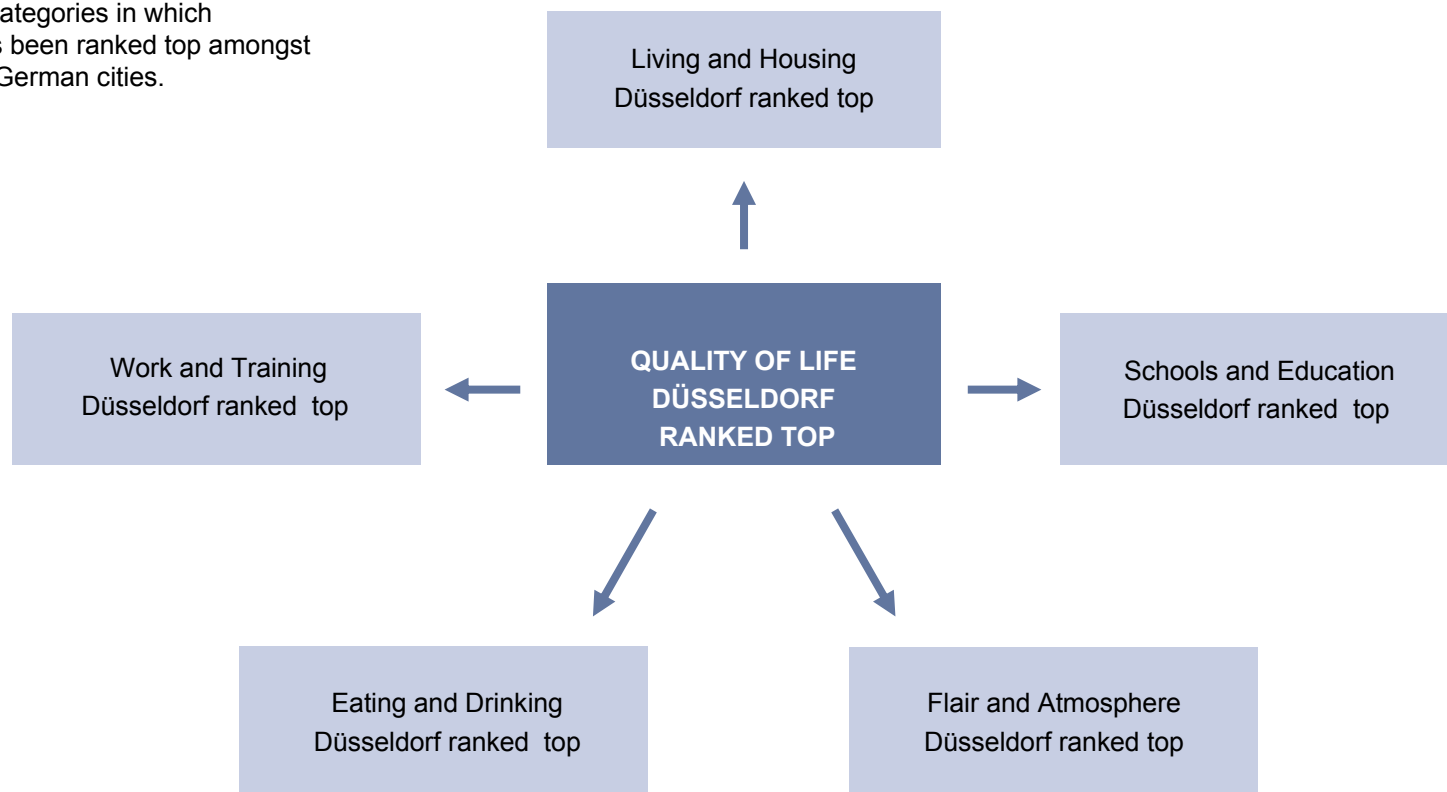
Source: Mercer Quality of Living V2012Q4.



Quality of life

Düsseldorf – the German city with quality of life

Quality of life categories in which
Düsseldorf has been ranked top amongst
the 15 largest German cities.



Source: ServiceValue GmbH V2012Q3.



Quality of life

People of Düsseldorf very satisfied with their city

Comparison of satisfaction of citizens in Germany's 14 largest cities plus Bonn

Rank	City	Number of points
1	Hamburg	84,4
2	Düsseldorf	81,0
3	Dresden	80,3
4	Hanover	79,6
5	Munich	79,4
6	Leipzig	79,0
7	Frankfurt	77,5
8	Bremen	76,3
9	Stuttgart	74,3
10	Bonn	73,6
11	Berlin	73,3
12	Cologne	72,8
13	Essen	68,5



The top categories for Düsseldorf in city comparison:

Family and children	Ranked 1st
Financial situation of city	Ranked 1st

The top categories for the people of Düsseldorf for their city:

Attractiveness as business location	80.0 points
Cultural events	79.8 points
Living environment/neighbourhood	75.9 points
Major sports events	75.1 points

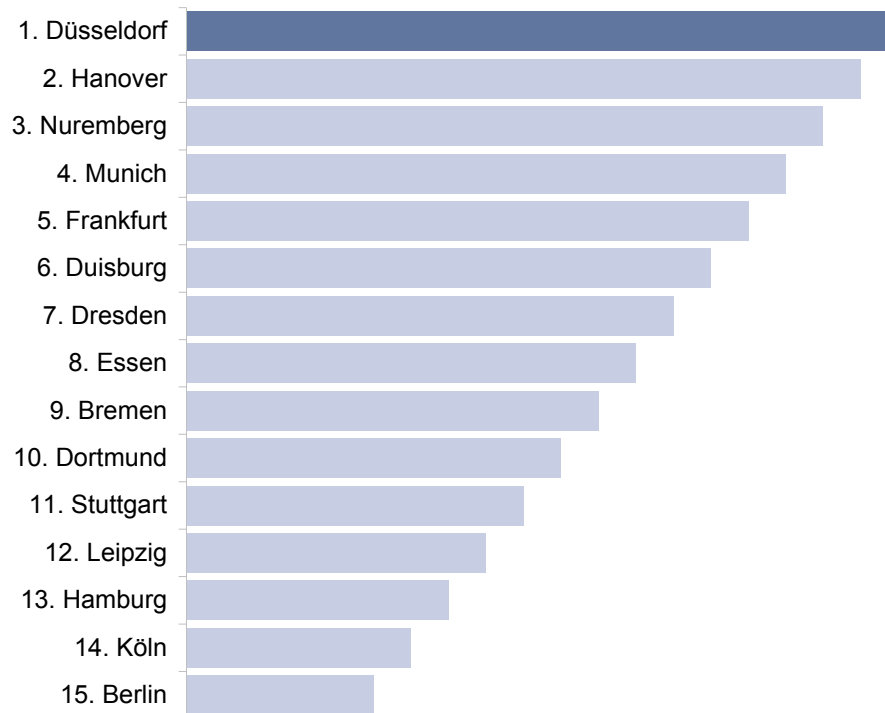
Source: Deutsche Post AG, Glücksatlas 2012 V2012Q3.



Quality of life

Düsseldorf is Germany's role model for citizen friendliness

Total order of 15 largest German cities



Düsseldorf's ranking in the 6 sub-disciplines

Sub-discipline	Rank	
Basic services	Düsseldorf ranked 1st	✓
Services offered	Düsseldorf ranked 1st	✓
Citizens' advice	Düsseldorf ranked 1st	✓
Fair dialogue with citizens	Düsseldorf ranked 1st	✓
Citizen service	Düsseldorf ranked 1st	✓
Sustainability and responsibility	Düsseldorf ranked 1st	✓

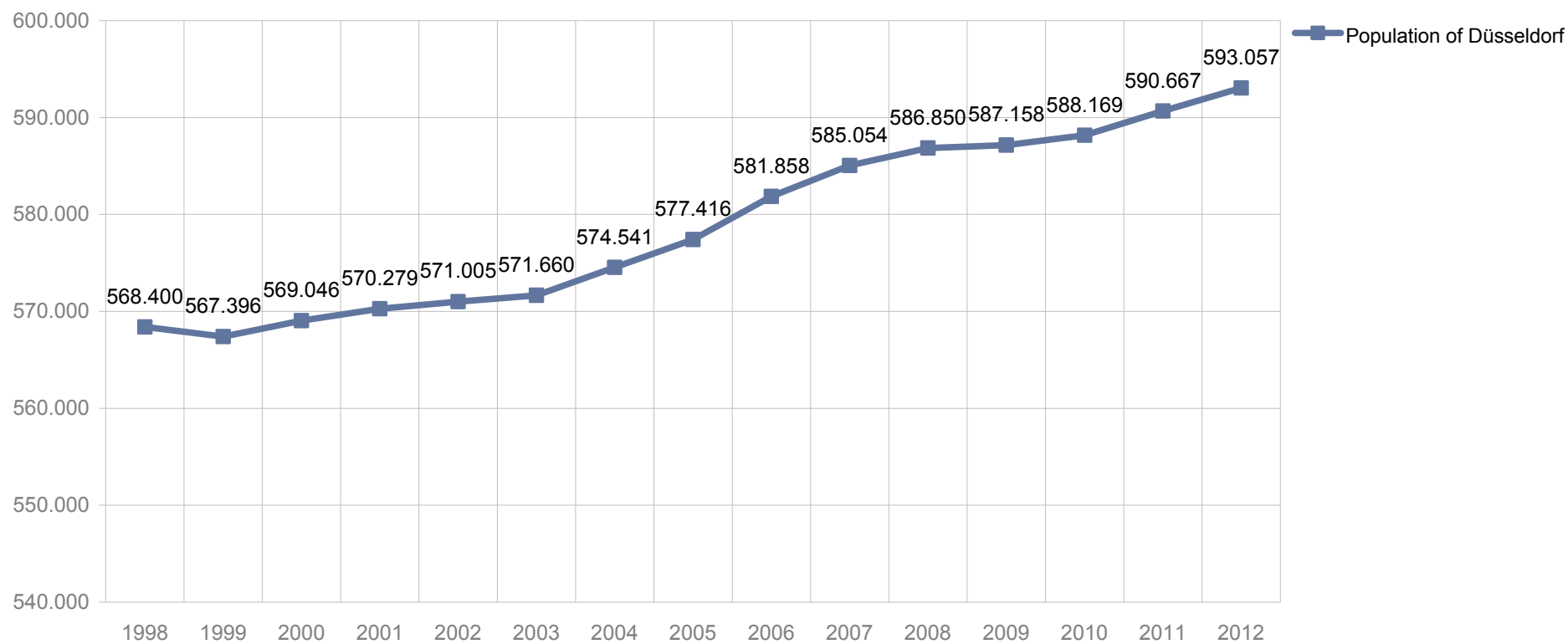
Source: ServiceValue GmbH, Customer verdict: best city administrations V2012Q3.



Quality of life

Continuing appeal of Düsseldorf for inhabitants

Status and development of Düsseldorf population 1998 – 2012



Source: Population update of Düsseldorf Statistics Office V2013Q2. Values as at 31.12. of each year.



Quality of life

Wide variety of sports

Sport in Düsseldorf (examples)

- Special Olympics 2014
- Football Club Fortuna Düsseldorf
- International PSD-Bank Indoor Meeting
- Tennis Power Horse Cup
- Federal Table Tennis Centre
- Popular City Marathon
- Triathlon Düsseldorf
- Judo Grand Prix
- Ice hockey with the DEG
- 500 tennis courts
- 27 indoor riding arenas
- 6 marinas
- Large choice of golf courses



Source: Business Development Düsseldorf Monitoring V2013Q3.



Quality of life

Düsseldorf – Excellent location for arts and culture

Art in Düsseldorf (examples)

K20, Art Gallery North Rhine-Westphalia

K21, Art Gallery im Ständehaus

Museum Kunstpalast

Hetjens Museum (ceramic art)

Heinrich-Heine Institut

Goethe Museum

Kunstakademie

Deutsche Oper am Rhein

Tonhalle (concert hall)

Düsseldorf Film Museum

Quadriennale 2014



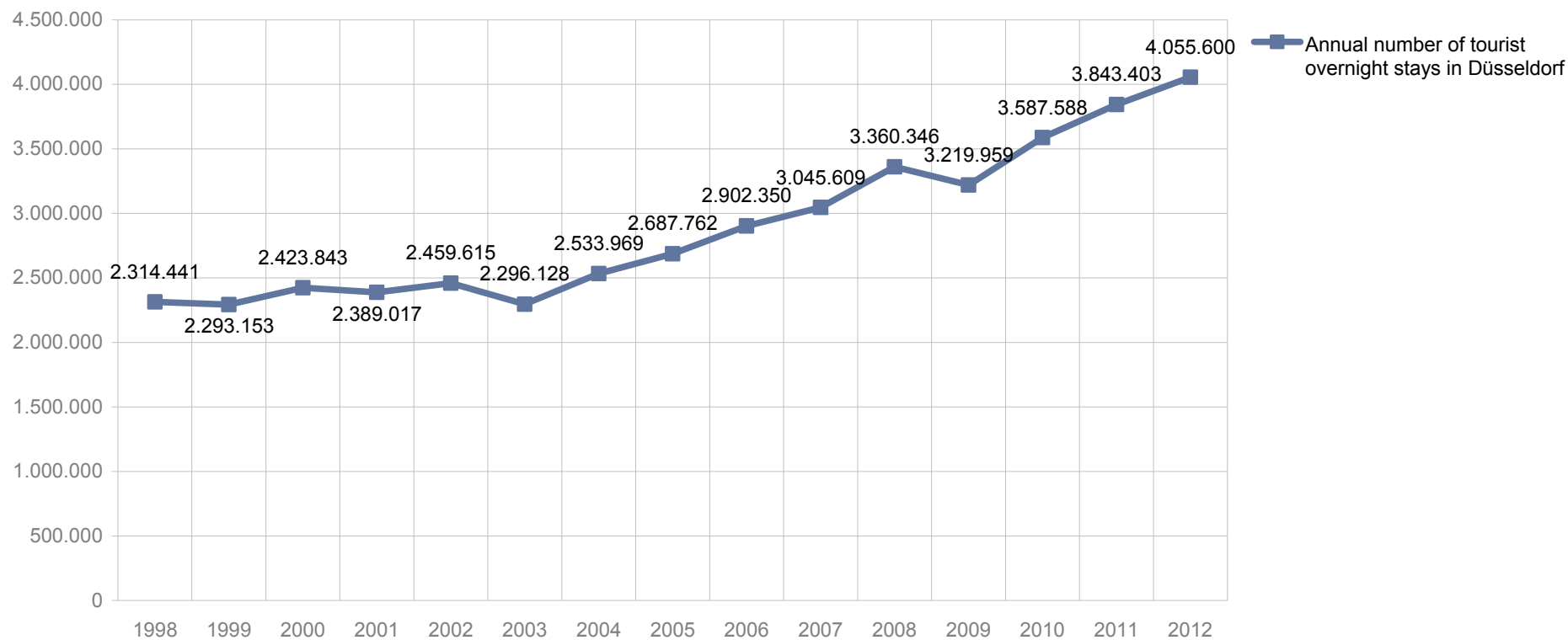
Source: Business Development Düsseldorf Monitoring V2013Q3.



Quality of life

Growing attractiveness of Düsseldorf as a tourist location

Development of tourist overnight stays in Düsseldorf 1998 - 2012



Source: ITNRW, Annual Guest Arrivals V2013Q2.