

Logistik.NRW
Cluster Nordrhein-Westfalen



NRW – The Number One Logistics Location in Europe

Exzellenz NRW
Cluster Nordrhein-Westfalen



North Rhine-Westphalia – Home of the Global Players

North Rhine-Westphalia is the economically strongest metropolitan region in Europe. If it were an independent nation, it would be one of the strongest export countries in the world. Even compared to the other German states, this region between the Rhine and the Ruhr Valley enjoys a leading position

A total of 34 of Germany's 100 largest companies and nine of Europe's 100 largest companies are based in the Rhine and Ruhr region. In addition to these there are more than 723,000 SMEs. Five of the top ten logistics companies also have their headquarters in North Rhine-Westphalia.

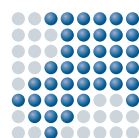
Logistics is the most important service sector in North Rhine-Westphalia. No other region in Europe boasts such an

efficient and tightly knit network of motorways, roads and railways. Around 24,000 logistics companies are located in North Rhine-Westphalia, employing 260,000 people.

Including those employees who perform logistical activities in the manufacturing and trade industry, there are around 600,000 people active in the logistics sector in North Rhine-Westphalia. This makes logistics one of the largest sectors in North Rhine-Westphalia and thus the backbone and driving force behind its economic success.



Photo: duisport/Reinhold



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Logistics State NRW – Lifeline of Industry

North Rhine-Westphalia is the heart of the Western European goods hub. Almost 40 percent of the EU population who generate some 45 percent of the purchasing power within the European Union live within a radius of 500 kilometers around the state capital Düsseldorf.

In total, just below 18 million people live in North Rhine-Westphalia alone. The largest city in the state is Cologne, which comes just below the million mark with 995,000 residents, followed by Dortmund (587,000), Essen (582,000) and Düsseldorf (581,000).

North Rhine-Westphalia is the center of the manufacturing industry in Germany. Here, 23 percent of those employed in the German manufacturing industry generate 22 percent of Germany's industrial turnover. The real gross domestic product currently totals EUR 484 billion. This represents a share of almost EUR 56,500 per person in employment.

With its four trade fair sites in Düsseldorf, Cologne, Essen and Dortmund, North Rhine-Westphalia has become one of the most important trade fair locations for international trade in Europe and the world. Some 50 leading trade fairs with over 6 million visitors annually are proof positive of the outstanding position enjoyed by North Rhine-Westphalia in the international trade fair sector.



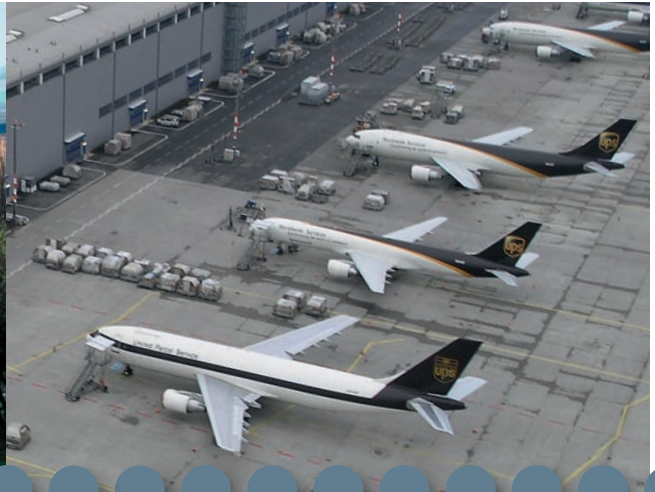
NRW Transport Network – Consolidation Point in Europe

With direct transport links to Belgium, the Netherlands, Spain, France, the UK, Switzerland and Austria, North Rhine-Westphalia connects Europe's major seaports with Scandinavia, the Baltic states, Russia, Poland, Hungary, the Czech Republic and Romania.

For intercontinental goods flows from and to Asia and North America, North Rhine-Westphalia is the first port of call in continental Europe and a constantly growing location for European distribution centers. More than 25% of all distribution centers in Germany can be found in North Rhine-Westphalia. With around 400 direct connections from eight airports, goods and passengers can reach all metropolises within and beyond Europe in just a few flying hours.

The state has around 7,100 kilometers of motorway and 22,500 kilometers of country roads. Almost 500,000 trucks are registered in North Rhine-Westphalia. Furthermore, North Rhine-Westphalia has the largest inland port in Europe in Duisburg. A total of 720 kilometers of waterways and 120 ports enable access to the North Sea, the Baltic Sea, the Atlantic, the Mediterranean and the Black Sea.

The region also boasts a dense railway network with a length of around 8,000 kilometers. Altogether, some 175 million metric tonnes are transported by rail per year in North Rhine-Westphalia in full-load transport. The large number of intermodal logistics sites and terminals facilitates the use of the railway system for logistical chains. The most important hubs are located in Duisburg, Cologne and the eastern Ruhr Valley.



North Rhine-Westphalia is connected to Rotterdam port via the Betuwe route. There are plans to invest EUR 3 million in North Rhine-Westphalia's railway network in the coming years.

Right in the Middle – Logistics Regions in NRW

Logistics is an essential function of modern industry. Therefore it is a key economic factor in all regions. The following regions of North Rhine-Westphalia have developed particular competences in logistics:

- 1 The **Cologne/Bonn area** is one of the state's core logistical regions and is especially strong when it comes to the fields of trade and chemical logistics. In addition, the region is home to Germany's most important intermodal terminal and Germany's second most important freight airport, Cologne/Bonn Airport.
- 2 The **Duisburg Lower Rhine region** includes Duisburg as well as the districts of Wesel and Kleve. As well as the Rhine as the lifeline of this region (ports ranging from Emmerich and Wesel to the most important inland port in Europe – Duisburg), contract logistics companies can be found here for a wide range of tasks. The University of Duisburg-Essen has developed a specialty in logistics (Center for Logistics and Traffic).
- 3 The **eastern Ruhr Valley** includes the strong locations Dortmund, Unna and Hamm. Not only does this region represent the logistical beating heart of the German trade logistics sector, it is also the location of Europe's most important research institute for logistics: the Fraunhofer Institute for Material Flow and Logistics (IML).

These core logistical regions are complemented by other regions with particular logistical competences:

- 4 The **central Ruhr Valley** (Herne, Recklinghausen district, Gelsenkirchen, Bochum, Ennepe-Ruhr district) is the preferred location for last mile logistics. At the very heart of the Ruhr Valley, first-rate distribution can be conducted from the sites in this area.
- 5 The **central Lower Rhine** (Neuss, Krefeld, Mönchengladbach) has established itself as a location for prominent logistics service providers and offers cutting-edge services in the field of textiles logistics.
- 6 The **Münsterland region** offers logistical sites with good transport links and is particularly strong in the food, mechanical engineering and vehicle construction industries. The region is the gateway to the Ruhr Valley and bridge to the Netherlands.

- 7 The **Bergische Land region** is of particular significance from a transport logistics point of view because of its location between Cologne/Bonn and the Ruhr Valley. For this reason, this region has developed a strong logistics industry.
- 8 The **Aachen region** is logistically interesting not only because of its proximity to Belgium and the Netherlands, but is also home to a research and development heavyweight in the form of RWTH Technical University Aachen.



- 9 The **Sauerland and Siegerland regions** are among the most important locations for mechanical engineering in Germany and are therefore a key source of logistical value creation.
- 10 The **Ostwestfalen-Lippe region** is one of the most thriving regions in the state of North Rhine-Westphalia. Furniture manufacturers, the food industry and a strong base of SMEs make this an important location for logistics companies.

Innovation State NRW – Focus on Knowledge

With 61 colleges and universities, 470,000 students and more than 50 non-university research institutes, North Rhine-Westphalia boasts Europe's densest scientific and research landscape. Five of Germany's ten largest universities are located in North Rhine-Westphalia.

By 2015, North Rhine-Westphalia is going to be Germany's number one innovation state, in other words the state with the most patents, the most employees and the highest investments in research and development.

One key instrument to achieve these objectives is the formation of clusters. For this reason, 16 clusters have been established in the most important leading sectors in the state.



North Rhine-Westphalian innovation policies are based on three pillars:

- The **higher education policy** opens up new creative leeway for colleges and universities, thus creating optimum conditions for teaching and research.
- The **specific funding** of research and technology specialties focuses on future fields with particular potential as well as the development of innovative business ideas and future trends.
- The **promotion of knowledge and technology transfer** strengthens interaction between the worlds of science and economics and therefore creates a network between the important leading sectors.

Logistics is one of these clusters as an essential cross-sectional industry. LOG-IT Club together with the Association of the Transport Industry and Logistics NRW (Verband Verkehrswirtschaft und Logistik NRW) has taken on the task of cluster management.

Furthermore, in the past few years numerous projects and initiatives have been started on behalf of the logistics location North Rhine-Westphalia which all pursue the goal of improving the location's competitiveness.

The Fraunhofer Institute for Material Flow and Logistics (IML) in Dortmund is the place to go for all issues surrounding holistic logistical processes. The Institute supports new tasks and requirements, develops new solutions and optimizes internal and external logistical processes. North Rhine-Westphalia therefore boasts most likely the world's most renowned research institute for logistics.

Logistics Cluster NRW – Competence Network

In early 2008, the logistics cluster “Logistik-Land NRW” initiated a process that aims at forming cross-company networks and information platforms as well as strengthening and marketing North Rhine-Westphalia as a logistics location.



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The cluster’s activities are financed by participating companies and members from North Rhine-Westphalia themselves. The project is being actively funded by the state government of North Rhine-Westphalia, supported by the European Union.

The cluster association (LOG-IT Club e.V.) is growing continuously and unites companies from a wide variety of fields of logistics, such as intralogistics, the real estate industry specializing in logistics, security technology, logistics IT or traditional logistical services. Furthermore, the 3,000 members of the shipping and logistics association VVWL (Verband Verkehrswirtschaft und Logistik Nordrhein-Westfalen e.V.) are incorporated in the activities as indirect cluster members. It goes without saying that contacts to other inter-sectoral clusters are also constantly expanded and cultivated within the network.

Solutions for the current and future challenges in the logistics sector are developed in sector groups, sector forums and numerous joint events with partners from the region. This aims at promoting a dialogue between the economy and science and assisting companies in improving their competitiveness. This is also helped by constant market observation by the NRW/Logistics Index and the opportunity to take part in trade fairs or training cooperations.

The aim is for modernization and growth in logistics companies in North Rhine-Westphalia, in order to establish the state as Europe’s number one logistics location.



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