Bavaria
More than fairy tale castles

Dr. Wolfgang Hübschle I Deutsch-Kanadisches Symposium “Kooperationsanbahnung” I October 23, 2015
Bavaria:
Strong and Successful
Truly in the Heart of Europe

Bavaria is among the most dynamic sites worldwide

Bavaria:

- **Area:**
  Germany's biggest Federal State (70,550 km²)

- **GDP (2014):**
  No. 8 in EU
  (522 Mio. Euro)

- **Population (2014):**
  No. 9 in EU
  (12.5 Mio. inhabitants)
Bavaria: Strong and Successful

Bavaria is among the most dynamic sites worldwide

- Unemployment rate (2015): 3.6 % (No. 1 in Germany)
- GDP per capita (2014): 41,181 €
- GDP (2014): 522bn € (No. 8 in the EU)
- New companies (2014): 98,298
- Patent applications (2014): 15,533 (No. 1 in Germany)
Industrial share on GDP in %

Quellen:
USA: The World Bank, World Development indicators, Manufacturing, value added (% of GDP)
Frankreich und Vereinigtes Königreich: Eurostat, Bruttowertschöpfung zu Basispreisen
Bayern und Deutschland: VGRdL, Bruttowertschöpfung in jeweiligen Preisen
Every second euro is generated through exports
Bavaria: Strong and Successful

Bavaria's leading trading partners (2014)

<table>
<thead>
<tr>
<th>Country</th>
<th>Trade volume [bn €]</th>
</tr>
</thead>
<tbody>
<tr>
<td>USA</td>
<td>29.2</td>
</tr>
<tr>
<td>China</td>
<td>28.5</td>
</tr>
<tr>
<td>Austria</td>
<td>28</td>
</tr>
<tr>
<td>Italy</td>
<td>20.7</td>
</tr>
<tr>
<td>United Kingdom</td>
<td>18.5</td>
</tr>
<tr>
<td>France</td>
<td>17.7</td>
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<tr>
<td>Czech Republic</td>
<td>16.2</td>
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<tr>
<td>Netherlands</td>
<td>13.8</td>
</tr>
<tr>
<td>Poland</td>
<td>10.9</td>
</tr>
<tr>
<td>Russia</td>
<td>10</td>
</tr>
</tbody>
</table>
More than one quarter of the German DAX-companies are located in Bavaria.
Bavaria: Strong and Successful

Small is beautiful

Bavaria's Hidden Champions

- ARRI
- Krones
- KBA Koenig & Bauer AG
- MIWE
- e-Manufacturing Solutions
- BRAINLAB
- Faber-Castell
- BHS
- Kinoton
- Wanzi
- Kathrein Antennen · Electronic
Companies in the processing industry with 500 or more employees

Companies in the processing industry with fewer than 500 employees
Bavaria: Engine for growth

Digital Economy

Cyber Security  Digital Engineering / Production  Networked Mobility

Manufacturing  Life Sciences / E-Health  E-Commerce / Tourism  Energy management / Clean Tech
Bavaria: Innovation and Quality

Universities and dual apprenticeships

- 9 state universities
- 2 elite universities (LMU and TU München)
- 17 state and 8 private universities of applied sciences
13 Max Planck institutes
8 Fraunhofer institutes
11 Fraunhofer project groups
3 Helmholtz institutes
10 other research centers

Bavaria: Innovation and Quality

Research Institutes
Bavaria: Outstanding Network
Bavaria: Outstanding Network

International Airport Munich: Networked throughout the world
Bavaria: Outstanding Network

13 non stop connections from North America to Munich

Destinations in North America (flight time)

- Atlanta 10:45 h
- Boston 08:40 h
- Charlotte 09:50 h
- Chicago 09:30 h
- Houston 12:00 h
- Los Angeles 12:20 h
- Montreal 08:30 h
- New York 09:10 h
- Philadelphia 09:15 h
- San Francisco 11:55 h
- Toronto 08:50 h
- Vancouver 10:30 h
- Washington 09:05 h
Life Science in Bavaria
Life Science in Bavaria

Medical technology

- Leading position within Europe with more than 530 companies.

- More than 60% of Germany’s electro medical equipment production in Bavaria.

- About 3% of the globally produced medical devices are from Bavaria.

- About 10bn € in revenues per year.

- Latest trends:
  biomaterials, minimal invasive medicine and health telematics.
Life Science in Bavaria

Biotechnology and pharma industry

- Bavaria is Germany’s largest biotech cluster accounting for up to 25% of all jobs in this sector.
- Nearly 200 companies active in the field of biotechnology.
- More than 150 companies operating in the pharmaceutical industry.
- More than 8,000 scientists working at distinguished universities and institutes.
Life Science in Bavaria

Networks

Innovation and entrepreneur center (IGZ) Würzburg:
Center for start-ups in the area of biotechnology

BioM:
Networking agency for the biotech sector in Munich and Bavaria

Forum MedTech Pharma e.V.:
Europe’s largest interdisciplinary network of business cooperation in the healthcare sector

Medical Valley EMN:
Germany’s leading cluster and network in medical engineering

BioPark Regensburg GmbH:
Biotech research cluster with 48 companies and nearly 3500 employees
Life Science in Bavaria

Excellent prospects for your investments
Strong aims:

• nuclear power phase-out until 2021

• double the share of renewable energies up to 50% of the overall electricity consumption until 2021

• increase share of renewable energy up to 20% of the final energy consumption until 2021

• reduce CO₂ emissions under 6 t/person/a.
Clean Tech Cluster Initiative

- Construction-use chemicals
- Industrial-use biotechnological products
- Polymer-based chemicals
- Chemicals treating surfaces

- Water and wastewater treatment
- Air pollution prevention and noise protection
- Recycling and waste management
- Alternative energy production from waste and biomass
- Material flow management

- Photovoltaic and solar thermal energy
- Wind energy
- Smart grids
- Increasing the efficiency and reducing the emissions of power plants

- Nanomaterial synthesis
- Nanophotonics
- Nanoelectronics
- Nanobiosystems
- Nanomechanics
Canada in Bavaria

A growing Canadian community in Bavaria

- About 3,000 Canadian citizens are living in Bavaria
- Consulate of Canada located in Munich
- German-Canadian Business Club in Munich
Canada in Bavaria

Bavaria: Home of more than 80 Canadian companies

Companies: Magna, Exfo, PCO Innovation, Open Text, 10 Years, iBwave, Bombardier, Redknee, Future Electronics, Pano, ATS Automation, Trojan Technologies, Focus Microwaves, Teledyne DALSA, Famic Technologies Inc.
Invest in Bavaria:
Partner for Business
Invest in Bavaria

The Business Promotion Agency of the State of Bavaria

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- Free
- Confidential

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- MYRIAD
- MITSUBISHI AIRCRAFT CORPORATION
- HUAWEI
- NSG GROUP
- Nexans
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