



Foreign companies in the Rhineland



OBJECTIVE | SOURCES

This survey is designed to show that the Rhineland is truly international due to the large number of foreign companies that are members of the Chambers of Commerce and Industry, which are collaborating in the „Rhineland Initiative“, in this case the Chambers of Aachen, Bonn/Rhein-Sieg, Düsseldorf, Köln, Mittlerer Niederrhein and Wuppertal-Solingen-Reimscheid.

The foreign companies associated with the Chambers of Commerce and Industry are made up of foreign companies registered in the official commercial register and other small foreign owned businesses.

The "Initiative Rheinland" aims to secure and improve the position of the Rhineland as one of the most attractive business destinations in Europe.

MARKUS database of Creditreform AG, Neuss, Germany, 2013

Databases of members maintained by Chambers of Commerce and Industry in the Rhineland, Germany, 2013

Ausländische Bevölkerung in Nordrhein-Westfalen am 31. Dezember 2011

Landesbetrieb Information und Technik Nordrhein-Westfalen (IT.NRW),
statistics division, Düsseldorf, Germany, 2011

Konjunkturbarometer Rheinland Jahresbeginn 2013

Chambers of Commerce and Industry in the Rhineland, Aachen, Germany, 2013

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INFORMATION ABOUT THE PUBLISHERS

Published in collaboration by the following Chambers of Commerce and Industry: Chamber of Commerce and Industry (IHK) Aachen, Germany,
Chamber of Commerce and Industry (IHK) Bonn/Rhein-Sieg, Germany,
Chamber of Commerce and Industry (IHK) Düsseldorf, Germany,
Chamber of Commerce and Industry (IHK) Köln, Germany,
Chamber of Commerce and Industry (IHK) Mittlerer Niederrhein, Germany,
Chamber of Commerce and Industry (IHK) Wuppertal-Reimscheid-Solingen, Germany
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Translation: RSH Management & Consulting GmbH, Düsseldorf, Germany

Design: 360° Design, Ulrike Wiest, Krefeld, Germany

Printed by: SD Service-Druck GmbH & Co. KG, Neuss, Germany

As at: September 2013



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FOREIGN COMPANIES IN THE RHINELAND: KEY FACTS

The six Chambers of Commerce and Industry in the Rhineland have **480,291 member companies**. Of these **46,924 have a foreign shareholder or owner**. Or put another way, one in ten companies is foreign-owned.

Of these foreign companies, **10,197** are entered in the commercial register, while the remaining **36,727 are small companies**.

The capital and the businesspeople themselves come from more than **160 nations**, spanning the globe from A for Australia to V for Vietnam.

The Netherlands tops the list of **foreign companies registered** followed by the United Kingdom and Switzerland.

With respect to **small companies**, **Polish** entrepreneurs have a slight edge over Turkish business people, who in turn are more numerous than the Italians, Greeks and Romanians.

Preferred sectors for those companies registered are **trade** (3,312) and **freelance, scientific and technical services** including legal advice, tax consultancy, market research etc. (2,192).

Trade is also the **top sector** for small companies (8,859), followed by **construction** (5,617) and the **hotel and catering industry** (5,291).



"The Rhine region and the city of Cologne in particular, is an important economic centre that has traditionally maintained friendly relations with China. The blend of Roman hospitality, Germanic diligence and the singular open-mindedness of the people made an impression on me from the start. The region's location in the heart of the EU, the proximity to customers and the availability of good professionals were all instrumental factors in our decision to bring our company here."

Mr. Yi Wu, Managing Director of Lead Deutschland GmbH (China), Cologne



Fig. 1 Location of the Rhineland within Germany und Europe

THE RHINELAND: A STRONG ECONOMY AND TRULY COSMOPOLITAN



In the context of this brochure the Rhineland is defined as the districts covered by the Chambers of Commerce and Industry for Aachen, Bonn/Rhein-Sieg, Düsseldorf, Köln, Mittlerer Niederrhein and Wuppertal-Solingen-Remscheid. The main cities in this economically powerful region are Aachen, Bonn, Düsseldorf, Cologne, Leverkusen, Bergisch Gladbach, Krefeld, Mönchengladbach, Neuss, Wuppertal, Solingen and Remscheid.



"Shiseido Deutschland GmbH is a subsidiary of the Shiseido Group in Japan, which was established in 1872 and now ranks as one of the world's foremost cosmetics companies. Shiseido entered the German market, one of the most attractive in Europe, in 1980. With its excellent infrastructure, exclusive shopping avenues and sizeable Japanese community, the fashion capital of Düsseldorf was the ideal location. Based in the Medien-Hafen area of the city, Shiseido Deutschland GmbH has developed into an increasingly important hub for Shiseido's European activities over the past decade – and the advantages of an outstanding location have played a big part in that achievement."

Mr. Masaki Douzono, President and Managing Director Shiseido Deutschland GmbH (Japan), Düsseldorf



„Cook Medical is a true pioneer in the field of minimally invasive surgery and since its foundation in 1963, has been to the forefront in developing innovative solutions to help patients throughout the world. The decision to locate its European Distribution Centre in NRW was driven by the availability of high quality infrastructure, its location in the heart of Europe close to major logistics hubs and the business-friendly welcome from the authorities in Baesweiler. This new facility will allow Cook Medical to provide an improved service to hospitals throughout Europe.“

Pat Burke, Director of Operations, COOK Medical (USA), Aachen

The economic strength of the Rhineland is impressively documented by official statistics. With a gross domestic product (GDP) of € 252 billion (2010) the Rhineland generated more than 10 percent of the Federal German GDP (€ 2,500 billion). Furthermore the productivity of the 2.6 million people in employment (06/2012) lies at approximately 10 percent above the German average.

This is reflected in the disposable income. For example, figures produced by GfK, a leading global market research company, show that purchasing power stands at nearly 7 percent (2012) above the Federal German average (106.5 to 100).

Germany has a total population of approximately 82 million and the state of North Rhine-Westphalia (NRW), the country's most populous state, 17.8 million. The Rhineland in turn is one of the most densely populated areas within the state with more than 40 percent of the latter figure, i.e. 7.3 million inhabitants.

Some 901,040 inhabitants of the Rhineland (12.3 percent) are from abroad, compared to 10.7 percent for NRW.

The Turks, with approximately 225,000 inhabitants (almost 25 percent), make up a clear majority amongst the non-German population. They are followed by Italians (around 70,000 or 7.8 percent), Poles (55,440 or 6.2 percent), Greeks (45,390 or 5.0 percent) and the Dutch (21,257 or 2.4 percent). These five groups together account for almost half of all foreigners living in the Rhineland area.

Tab. 1 Foreign national residents in the Rhineland

REGION	POPULATION AS AT 31.12.2011			%
	Total	Germans	Non-Germans	
IHK Aachen	1,539,751	1,360,093	179,658	11.7
Cities Association of Aachen	566,816	493,116	73,700	13.0
City of Aachen by itself	260,454	217,247	43,207	16.6
Düren District	267,104	240,933	26,171	9.8
Euskirchen District	190,591	180,194	10,397	5.5
Heinsberg District	254,786	228,603	26,183	10.3
IHK Bonn	928,345	829,499	98,846	10.6
Bonn	327,913	278,637	49,276	15.0
Rhein-Sieg District	600,432	550,862	49,570	8.3
IHK Düsseldorf	1,086,850	925,352	161,498	14.9
Düsseldorf	592,393	483,940	108,453	18.3
Mettmann District	494,457	441,412	53,045	10.7
IHK Köln	2,199,633	1,928,485	271,148	12.3
Cologne	1,017,155	851,039	166,116	16.3
Leverkusen	161,195	143,735	17,460	10.8
Rhein-Erft District	465,578	417,083	48,495	10.4
Rhein-Berg District	276,173	258,778	17,395	6.3
Oberberg District	279,532	257,850	21,682	7.8
IHK Mittlerer Niederrhein	1,235,296	1,109,514	125,782	10.2
Krefeld	234,396	203,935	30,461	13.0
Mönchengladbach	257,208	228,916	28,292	11.0
Rhine County of Neuss	443,850	399,246	44,604	10.0
Viersen District	299,842	277,417	22,425	7.5
IHK Wuppertal	618,765	528,471	90,294	14.6
Wuppertal	349,470	294,930	54,540	15.6
Solingen	159,699	139,204	20,495	12.8
Remscheid	109,596	94,337	15,259	13.9
Rhineland total	7,353,854	6,452,811	901,043	12.3
North Rhine-Westphalia	17,841,956	15,933,835	1,908,121	10.7

Source: Ausländische Bevölkerung in Nordrhein-Westfalen am 31. Dezember 2011 (IT.NRW – statistics division, Düsseldorf 2011)

THE RHINELAND: A STRONG ECONOMY AND TRULY COSMOPOLITAN

There are many sound reasons for the Rhineland's internationalism. For example entrepreneurs can safely assume that they will find a first-class infrastructure with a comprehensive network of motorways and railways, efficient inland ports and two international airports operating out of Düsseldorf and Cologne/Bonn. What's more, neighbouring countries, such as the Netherlands, Belgium, Luxembourg and France, are just a stone's throw away. State-of-the-art data connections complete the outstanding infrastructure of the Rhineland. Universities, higher education institutes

Tab. 2 Foreign companies in the Rhineland

TYPE OF COMPANY	BREAKDOWN		
	Number	%-value	Ratio of foreign companies to all companies in the Rhineland in %
Small companies	36,727	78.27	10.9
Companies registered in the official register of companies	10,197	21.73	7.1
Total	46,924	100.00	9.8

Source: Creditreform, IHKs and own calculation

Fig. 2 Infrastructure in the Rhineland



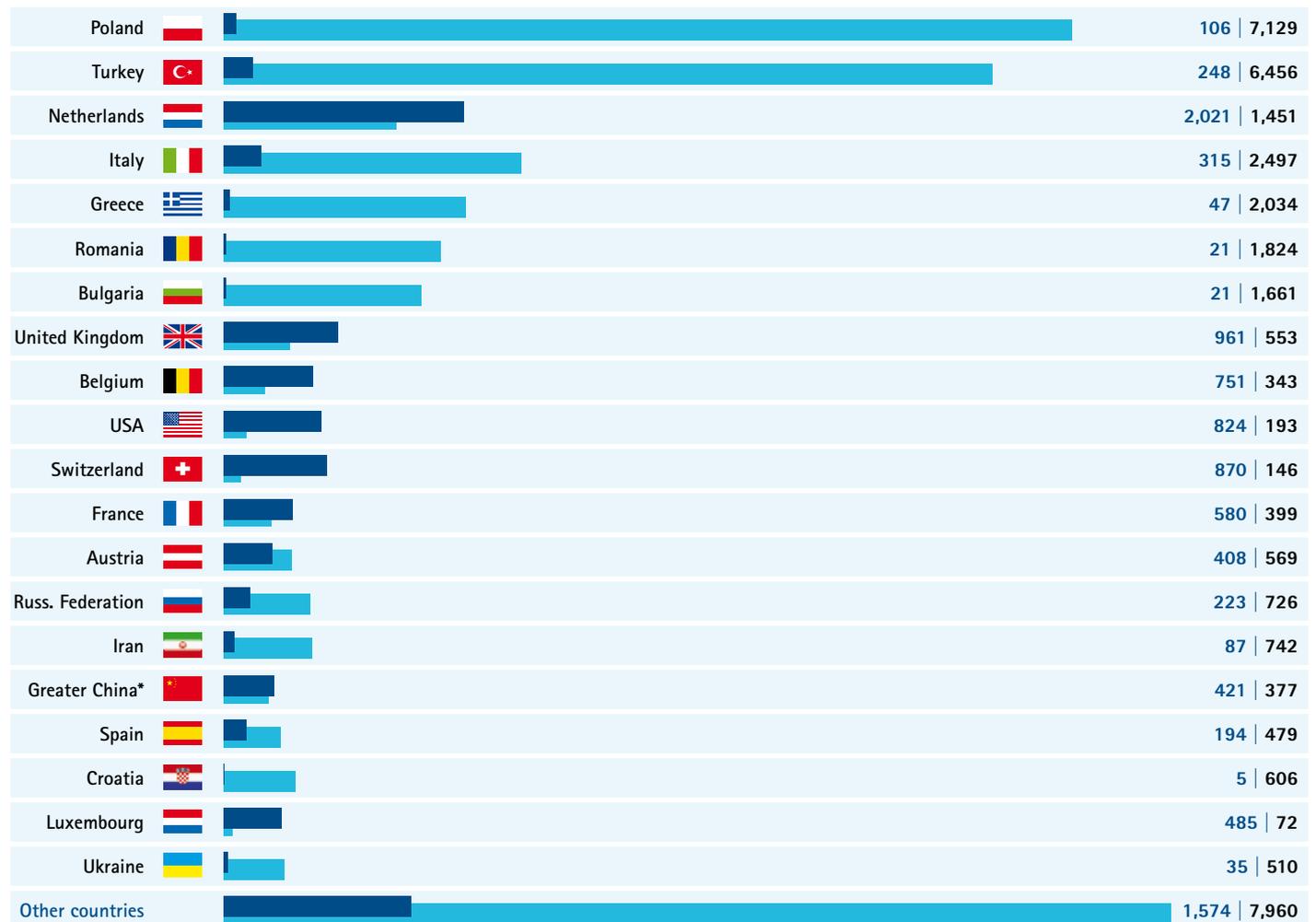
and research centres in Aachen, Bonn, Düsseldorf, Cologne, Krefeld/Mönchengladbach, Wuppertal and Jülich maintain close links with industry and some businesses also run their own research facilities. Düsseldorf and Cologne are also the venues for many of the world's leading trade fairs. Finally, the high standard of living should not be overlooked. This is a great place to live with a wealth of culture and diverse landscapes – not to mention the famously friendly and fun-loving Rhinelanders.



"We've been based in Neuss for 25 years now. We decided on Neuss as a location when we were still a dynamic young company with a fast-growing workforce. Here we found the space we needed to develop as a business. Today we have not only our administrative headquarters in Neuss, but also a sales and customer support branch and a used cars outlet. Good transport connections and proximity to our parent company in the Netherlands are other big advantages."

Johan Friman, Managing Director, LeasePlan Deutschland GmbH (Netherlands), Neuss

Fig. 3 Top 20 foreign registered companies and small companies in the Rhineland



* China, Hongkong, Macao, Taiwan | Source: Creditreform, IHKs and own calculation

Registered companies Small companies

TRADE COMES FIRST: BOTH FOR REGISTERED COMPANIES AND SMALL COMPANIES ALIKE

The six Chambers of Commerce and Industry in the Rhineland have 480,291 member companies. Of those companies 143,956 or just under 30 percent are noted in the Commercial Register. The total number of registered companies from abroad (10,197 out of 46,924) account for more than 21 percent of all foreign businesses.

The No. 1 business activity is trade (wholesale, retail and commercial agencies) with 3,312 companies, followed by freelance, scientific and technical services (2,192) and manufacturing (1,067).

The remaining 336,326 companies (70 percent) are small businesses. Foreign companies comprise 78 percent of these businesses (36,727), far higher than the proportion of registered firms. Trade once again claims top spot in the list of sectors in which small businesses from abroad are active (8,859 businesses); it is followed by construction (5,617) and the hotel and catering industry (5,291).

Fig. 4 Top 10 industry sectors of foreign registered companies in the Rhineland

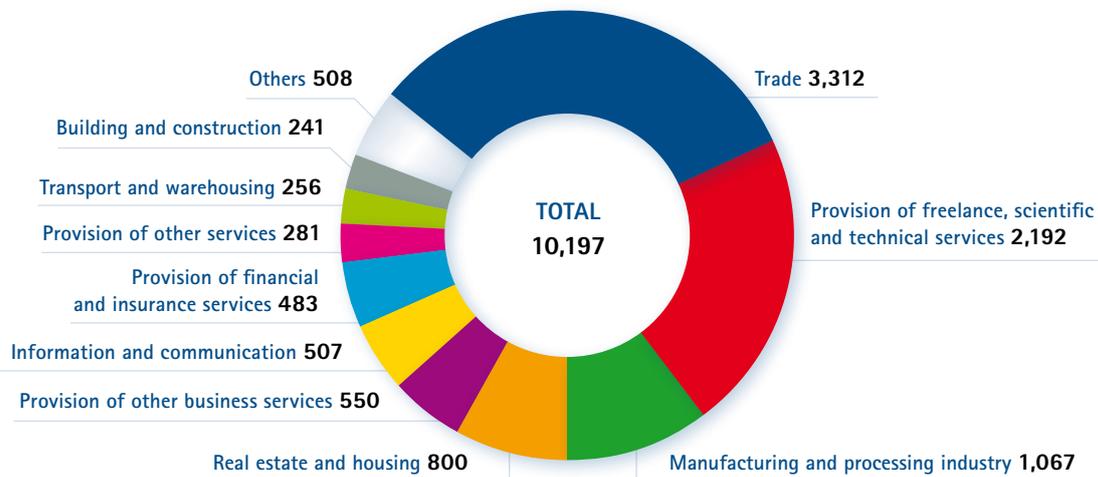


Fig. 5 Top 10 countries - showing origin of foreign registered companies in the Rhineland



* China, Hongkong, Macao, Taiwan | Source: Creditreform, IHKs and own calculation



"Whether it's a small car or a top-of-the-range model, a transporter or a SUV – there's a piece of Edscha, and therefore a bit of the Bergisches Land, in just about every car. These days our innovative products are manufactured at 17 production sites around the world, but much of the research and development work is still done at our Remscheid headquarters. With its high number of universities and other higher education institutions, the region offers the ideal conditions for this."

Thorsten Greiner, Chief Executive Officer at Edscha Holding GmbH (Spain), Remscheid

Fig. 6 Top 10 industrial sectors of foreign small companies in the Rhineland

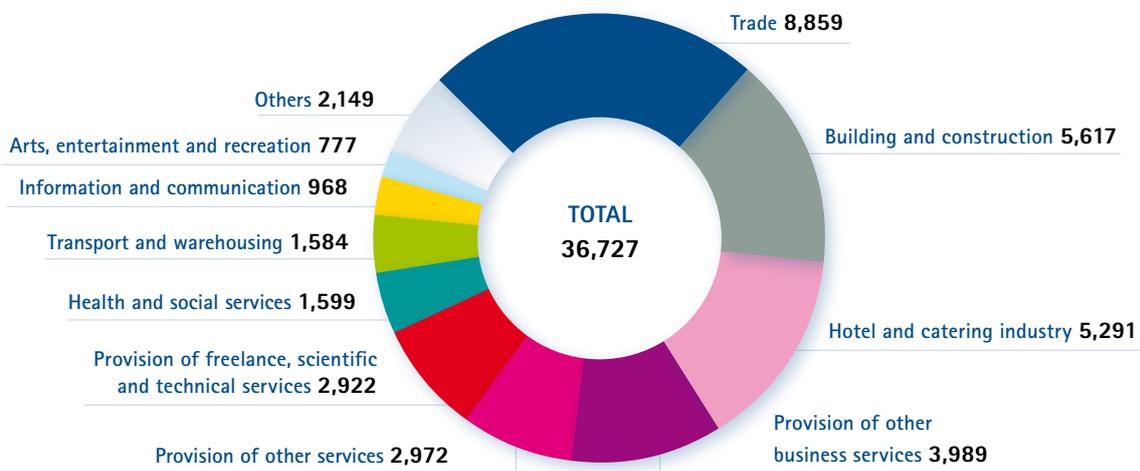


Fig. 7 Top 10 countries - showing origin of foreign small companies in the Rhineland



Source: Creditreform, IHKs and own calculation

REMARKABLE DIVERSITY: COMPANIES COME FROM OVER 160 COUNTRIES

Of the 10,197 foreign firms registered in the Rhineland, the undisputed frontrunner is the Netherlands with 2,021 having a majority Dutch ownership (almost 20 percent). In second place is the United Kingdom (accounting for more than 9 percent with 961); then comes Switzerland (870 or 9 percent), the USA (824 or around 8 percent) and Belgium (751 more than 7 percent). Here is an overview of some of the most important nations doing business in the Rhineland:



NETHERLANDS

The Dutch are lucky to have a massive market right on their doorstep and use the Rhineland as a springboard into North Rhine-Westphalia and Germany as a whole. Leading companies include the mobile telephone provider **E-Plus** in Düsseldorf, which is part of the **KPN** telecommunications group, the biotechnology firm **Qiagen** in Hilden, dairy giant **FrieslandCampina** (which has its largest German site in Cologne), the post and parcel delivery firm **TNT** in Troisdorf and Ratingen, **Leolux** Möbelfabrik in Krefeld and **LeasePlan** in Neuss. In the construction sector, the project developer **Kondor Wessels** has a base in Wuppertal.



UNITED KINGDOM

British companies tend to focus on the districts around Düsseldorf and Cologne. Examples include **Vodafone** (telecommunications), **Castrol/BP** (lubricants), **HSBC Trinkaus & Burkhardt** (banking) and **BBDO** (advertising). However **Wilkinson Sword**, renowned for its shaving and cosmetic articles, has its German subsidiary in Solingen.



SWITZERLAND

In typically Swiss fashion, the country plays its financial and investment cards close to its chest. A number of Swiss businesses located in the Rhineland are world famous, including master chocolate makers **Lindt & Sprüngli** and **Stollwerck** with production facilities in Aachen and Cologne respectively, whilst the **Nestlé** Group has locations in Neuss ("Thomy" delicatessen products) and Euskirchen (pet foods). Switzerland, with its reputation as a provider of insurance and financial services, does considerable business through the **Zurich Insurance** Group with its German headquarters based in Bonn. The personnel recruitment services company **Adecco** maintains its German headquarters in the region (Düsseldorf), while textiles firm **Christian Fischbacher** has a base in Remscheid.



USA

One of the first examples of American investment in Germany began in 1908 when the agricultural machinery manufacturer **International Harvester** was established in Neuss and property purchased in the docklands. Sometime later in 1930 the **Ford Motor Company** established a base in Cologne. Over a period of 60 years, the German headquarter of multi-technology group **3M** in Neuss, with sites in Hilden and in Jüchen, has expanded to become the firm's second largest outside of the USA. Other big names include the food producer **Mars** in Viersen and **Procter & Gamble**, manufacturer



"I have seen many places in the world and the people in the Rhineland are incredibly open-minded and friendly. Bonn is well connected internationally. It is the home of the UN in Germany and hosts many international companies, federal ministries and NGOs, giving the city a cosmopolitan feel. We have an exceptionally good working atmosphere here. Personally, I love the nature in and around Bonn, particularly near the Rhine. When I worked in Shanghai I had to travel near to four hours to see a green tree; all I have to do here is to step out of the door and walk a few paces."

Richard Boulter, CEO, Eaton Industries GmbH, Bonn



of sanitary products in Euskirchen. Logistics specialist, **United Parcel Service (UPS)**, directs its fleet of vehicles from Neuss and uses Cologne/Bonn airport as its hub for Europe. **Ford** and **Microsoft** meanwhile maintain research and innovation centres in Aachen. The paint specialist **Axalta** (formerly Dupont Performance Coatings) has a plant in Wuppertal; **Johnson & Johnson**, producer of healthcare and other consumer goods has a subsidiary in Neuss. **Eaton** operates globally providing diversified power management services. The company has sites in Bonn, Lohmar, Meckenheim, Nettersheim and Neuss. **Cook Medical**, suppliers of minimally invasive medical devices, has its European distribution centre in Baesweiler. **General Electric**, one of the world's largest conglomerates, is represented in Solingen with the European headquarters of its ultrasound division.



JAPAN

The area around Immermannstrasse in the state capital Düsseldorf is often referred to as 'little Tokyo', and with good reason. Ninety percent of all Japanese companies in North Rhine-Westphalia are based in the city or the neighbouring districts of Mettmann and Neuss. Japanese companies represent numerous sectors including the automotive industry (**Toyota**, **Nissan**), IT/communications (**Canon**, **Epson**, **Kyocera**, **NEC**), photography (**Canon**, **Fuji**), mechanical engineering and steel (**Komatsu**, **Mitsubishi**, **Nippon Steel**), high tech material (**Toho Tenax**) and cosmetics (**Shiseido**).



GREATER CHINA

Companies from Greater China (including China, Hong-kong, Macau and Taiwan) are displaying an increasing interest in the Rhineland. Chinese IT giants **Huawei** and **ZTE** oversee their European operations from Düsseldorf; construction machinery manufacturer **XCMG** has its European headquarters and a research and development centre in Krefeld while **Sany** has a factory in Bedburg, near Cologne. The **Dong Feng Europe** Group (which deals in agricultural machinery and equipment) also opted for a base in the Rhineland and chose Wuppertal. Finally there is **Lead** based in Cologne, whose main activities are the development, production and distribution of industrial PC-components.

NORWAY, SWEDEN AND MANY MORE

Scores of other big companies from almost every country in Europe and many other corners of the globe have chosen to set up in the area. **Hydro Aluminium** from Norway, for example, has branches in Neuss, Grevenbroich and Bonn. **Ericsson**, the Swedish manufacturer of telecommunications equipment, has its German headquarters in Düsseldorf along with research institutes in Aachen and Herzogenrath. Meanwhile the security services provider **Securitas** and the tool maker **Sandvik** are based in Düsseldorf. Examples of a Belgium presence include **UCB Pharma** in Monheim, **Rheinkalk** in Wülfrath and **Agfa-Gevaert**, which has offices in Cologne, Bonn and Düsseldorf. The Santander Group from Spain focuses its German activities on the **Santander Consumer Bank** in Mönchengladbach, offering a range of consumer banking services. **Edscha Holding GmbH**, part of the Spanish corporate group Gestamp is a global market leader for hinge systems based in Remscheid. France has a high profile in the Rhineland with the German head offices of car producers **Renault**, **Peugeot** and **Citroën** located in Cologne, while those of cosmetics company **L'Oréal** are to be found in Düsseldorf and Neuss. Since **Tata Steel** took over the Corus Group, India has been represented by the steel businesses **Hille & Müller** in Düsseldorf and **Degels** in Neuss.



A LARGE PERCENTAGE OF SMALL COMPANIES ARE FROM POLAND AND TURKEY

The most active nation when it comes to establishing small companies is Poland: 7,129 people from the neighbouring state not far to the east have acquired a trading licence, making up more than 19 percent of all small companies from abroad. The Turks are in second place with 6,456 companies (approximately 17.5 percent); third, fourth, and fifth place are taken by the Italians (2,497 or nearly seven percent), Greeks (2,034 or roughly 5.5 percent) and Romanians (1,824 or just under five percent).



CLOSE-UP: THE DISTRICTS COVERED BY THE SIX CHAMBERS OF COMMERCE AND INDUSTRY IN THE RHINELAND

AACHEN

It is perhaps not surprising that Aachen is a particularly international and cosmopolitan city as it is situated right where the borders of Germany, Belgium and the Netherlands come together. Major companies and research facilities around the world are highly appreciative of one of Europe's most research-intensive regions. The industrial scene is dominated by mechanical engineering and chemicals as well as the production of rubber, plastic goods, paper and food. The region is also home to innovative firms working in such future-oriented sectors as energy, engineering services, IT, life sciences, automotive and environmental engineering. The IHK covers the region of the Cities Association of Aachen as well as the districts of Düren, Heinsberg and Euskirchen.

The economic structure of the region is determined by the service sector. In particular the area accommodates the information and telecommunications branch, the logistics sector and other providers of production-related services. The manufacturing sector also has a strong presence in the Rhein-Sieg District, especially the plastics industry, mechanical engineering and automotive component suppliers. Nineteen UN bodies and around 150 international organisations and NGOs are located in Bonn, helping it to enjoy considerable international networking in the fields of renewable energy, sustainable resources management and cooperation with development projects. The city also offers world-class facilities for organising international conferences, meetings and other events and ranks as an outstanding science and research hub.

Tab. 3 Number of foreign companies in the Rhineland

Registered companies				Small companies			
Country		Number	Country		Number		
AACHEN							
1	Netherlands	446	Turkey		940		
2	Belgium	409	Poland		762		
3	USA	73	Netherlands		696		
4	Switzerland	70	Greece		321		
5	United Kingdom	63	Romania		299		
6	France	51	Italy		269		
7	Luxembourg	43	Belgium		181		
8	Italy	38	Bulgaria		172		
9	Austria	28	Iran		135		
10	Greater China*	24	Serbia		123		
	Other countries	190	Other countries		1,696		
	Total	1,435	Total		5,594		
BONN/RHEIN-SIEG							
1	USA	76	Turkey		524		
2	Switzerland	63	Poland		519		
3	Netherlands	59	Italy		243		
4	Austria	46	Bulgaria		213		
5	Luxembourg	43	Greece		187		
6	United Kingdom	40	Romania		180		
7	Italy	35	Iran		160		
8	France	34	Russian Federation		99		
9	Belgium	28	Netherlands		84		
10	Greater China*	17	Austria		78		
	Other countries	173	Other countries		1,486		
	Total	614	Total		3,773		
DÜSSELDORF							
1	Netherlands	631	Poland		2,061		
2	United Kingdom	516	Turkey		1,198		
3	Switzerland	334	Greece		620		
4	USA	303	Italy		592		
5	Luxembourg	236	Romania		409		
6	France	219	Bulgaria		268		
7	Japan	197	Russian Federation		206		
8	Greater China*	165	Croatia		189		
9	Austria	126	Maroc		183		
10	Belgium	102	Ukraine		177		
	Other countries	929	Other countries		2,755		
	Total	3,758	Total		8,658		

* China, Hongkong, Macao, Taiwan | Source: Creditreform, IHKs and own calculation



COLOGNE

Proud of its Roman origins, the city of Cologne has over its long history developed into one of Germany's principal logistical centres and is now home to one of the country's largest freight depots and possesses the second largest inland harbour and cargo airport in Germany. Cologne is also a hub for the insurance industry, creative industries and the media sector. Industry as a whole has established strong international links with an export ratio of over 50 percent, yet Cologne is also an innovative, research-intensive academic region with several institutes of higher education. The IHK Köln District incorporates the urban districts of Cologne and Leverkusen as well as the districts of Oberberg, Rhein-Erft and Rhein-Berg.

MITTLERER NIEDERRHEIN

The region – which includes the cities of Krefeld and Mönchengladbach, the Rhine County of Neuss and the Viersen District – extends from the Rhine in the east to the Dutch border in the west. With an extensive motorway network and conveniently located airports and inland harbours, the region is superbly connected. No wonder so many international companies – which now account for a significant proportion of the region's 50 percent-plus export ratio – have based themselves here. The main industries in Mittlerer Niederrhein are chemicals, mechanical engineering, electrical engineering, steel, aluminium, lignite mining, energy supply, textiles and (semi-luxury) foods.

WUPPERTAL-SOLINGEN-REMSCHIED

The Bergisch tri-city district of Wuppertal, Solingen and Remscheid is traditionally known for manufacturing and accounts for a share of around 36 percent. Industries include the production of metal products, mechanical engineering, the electrical industry, metal production and processing, the chemicals industry, automobile manufacture, the food and animal fodder industry and the rubber and plastics sector. Over time numerous companies from abroad have settled in the area with a view to exploiting local know-how. With an export ratio approaching 50 percent, the business community of the Bergisches Land has excellent international links. Another mainstay of the region is the services industry, which focuses on trade and business services.

Tab. 3 Number of foreign companies in the Rhineland

Registered companies		Small companies		
Country	Number	Country	Number	
COLOGNE				
1	Netherlands	360	Poland	2,658
2	Switzerland	245	Turkey	2,244
3	United Kingdom	239	Italy	824
4	USA	201	Bulgaria	802
5	France	197	Romania	672
6	Austria	134	Greece	375
7	Belgium	117	Iran	225
8	Turkey	109	Russian Federation	217
9	Greater China*	95	Croatia	157
10	Luxembourg	93	Ungarn	153
	Other countries	668	Other countries	3,132
	Total	2,458	Total	11,459
MITTLERER NIEDERRHEIN				
1	Netherlands	468	Turkey	1,334
2	USA	112	Poland	1,055
3	Switzerland	105	Italy	480
4	Greater China*	99	Greece	467
5	United Kingdom	86	Netherlands	342
6	Belgium	85	Romania	258
7	Japan	77	Bulgaria	194
8	Italy	70	United Kingdom	164
9	France	57	Serbia	148
10	Austria	55	Croatia	121
	Other countries	339	Other countries	1,875
	Total	1,553	Total	6,438
WUPPERTAL-SOLINGEN-REMSCHIED				
1	USA	59	Turkey	216
2	Netherlands	57	Italy	89
3	Switzerland	53	Poland	74
4	France	22	Greece	64
5	Greater China*	21	Maroc	32
6	Austria	19	Serbia	24
7	United Kingdom	17	Ukraine	23
8	Luxembourg	17	Russian Federation	21
9	Italy	11	Vietnam	18
10	Russian Federation	11	Croatia	17
	Other countries	92	Other countries	227
	Total	379	Total	805

* China, Hongkong, Macao, Taiwan | Source: Creditreform, IHKs and own calculation



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