Locations looking to the future
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The Hamburg Metropolitan Region is one of the most competitive regions in Germany or Europe. Fourteen districts in Lower Saxony and Schleswig-Holstein have joined forces with the Hanseatic City of Hamburg to develop their strengths together.

Today, **4.3 million people** live and work here. The Hamburg Metropolitan Region – the hub of Europe’s most vital transport arteries – is the economic centre of North Germany. The Metropolitan Region achieved a gross domestic product totalling more than **€ 148 billion** in 2008.

The Metropolitan Region has something for everyone, whether in the city with its cultural richness or in the inimitable natural surroundings of the countryside. Efficient regional transport networks keep people on the move. A wide choice of leisure and educational facilities make life more convenient.

This quality of life is attracting more and more people to the region: since 2000 the population has grown by 2.7 per cent.
The business centre of the North

More than one thousand years after the foundation of the port of Hamburg, the Metropolitan Region is the most important trade and business centre in Northern Europe today. At least 200,000 businesses are based in the region, which are joined by around 10,000 more companies a year.

Hamburg port, with more than 150,000 employees, is the most important provider of work in the Metropolitan Region. Not only is it Germany’s largest multifunctional port, but it is also a vital distribution point for goods traded between the North and Baltic seas. A good seven million standard containers were handled in the Port of Hamburg in 2009.
In parallel, a large number of **globally active companies** have developed which have significant shares of their markets today or have become world famous brands in particular niches.

The Metropolitan Region leads the way with innovative products in many areas such as aerospace technology, offshore wind farms, computer software, pharmaceutical products or high-quality foods.

Production of this type is embedded in a network of suppliers, highly efficient logistics systems and services closely linked to companies.
Cluster initiatives cross-link companies from these sectors in particular with the aim of strengthening the location through exchanges of ideas, technologies or specialist staff.

Contact data and more information from:

http://english.metropolregion.hamburg.de/map-clusterinitiatives/
The Metropolitan Region promotes networking between its economic sectors. Particularly strong sectors are:

- Aerospace
- Maritime economy
- Port and logistics
- Media and IT
- Chemicals industry
- Life sciences
- Food
- Regenerative energies
- Engineering
- Tourism

www.english.metropolregion.hamburg.de/sectors/
The Hamburg Metropolitan Region is one of the world’s leading locations for the civilian aerospace industry. In Germany, one employee in three in the aerospace industry works in or around Hamburg. The sector has around 36,000 highly skilled employees in the Metropolitan Region.

Here you will find an accumulation of talent that reflects every aspect of aircraft development, aviation construction, aircraft maintenance and airport management. In addition to the three large enterprises – Airbus Deutschland GmbH, Lufthansa Technik AG and Hamburg Airport GmbH – more than 300 small and medium-size companies and a large number of technical-scientific institutions contribute know-how.
The Hamburg Metropolitan Region aviation cluster, with its all-round strategy for economic, ecological, convenient, reliable and flexible aviation, won the German government’s Leading Cluster competition in September 2008. Core competencies in the Hamburg Metropolitan Region aviation cluster are used intensively. The four main pillars of sectoral competence are aircraft and aviation systems, cabins and cabin systems, air cargo systems and services for flight operations.

North Germany’s place for aviation has been heavily involved in development of the large-capacity A380 airliner, the largest project in modern aviation industry so far. All works in Hamburg, Stade and Buxtehude are participating in its development and construction.
Globalisation has led to a sharp rise in volume of global cargo handling for the logistics sector. Increasing quantities of goods are being manufactured in the most far flung areas of the world, from which they then have to be transported somewhere else. The Hamburg Metropolitan Region has benefited particularly from this trend. Its position at the **crossroads between North, Central and Eastern Europe** mean that the Metropolitan Region is a favoured location for logistics.

A smooth-functioning logistics sector is indispensable to the efficiency of all other economic sectors. The Metropolitan Region, with global commercial traditions going back to the era of the Hanseatic League and beyond, is a high performer in this area. Modern logistics adds up to far more today than storage, transport and handling: pressure on time and efficiency, coupled with the highest expectations of quality, as well as the most variable conditions prevailing around the globe, have made logistics a high-tech field.
The logistics sector is one of the most important sectors of the economy, both in the Metropolitan Region and elsewhere. Many companies use the Metropolitan Region for their cargo handling, distribution and warehousing needs. Multinationals control their global logistics networks from here. **More than 240,000 employees in over 6,000 businesses** are ensuring the success of the logistics sector – and the trend continues upwards.

Logistics companies make high demands of their locations and currently demand many commercial sites. The Metropolitan Region, with its close-knit network of transport connections and land reserves, can meet these demands.
The port towns of Hamburg, Brunsbüttel, Stade, Cuxhaven and Glückstadt can look back on a long tradition in the maritime economy. Proximity to the sea and closeness to water have shaped the region for centuries, forming the foundations of the Metropolitan Region’s economic success.

The port towns are both centres of gravity and the driving force of the maritime economy. Whether it is shipping spanning the globe, shipbuilding, the many ships’ chandlers, powerful port businesses or logistics – the Metropolitan Region can offer it all. Not to mention marine and offshore technology businesses, hydraulic engineers and fisheries that are leaders worldwide.
With its wide range of maritime services and world-renowned maritime education and research institutions, the Hamburg Metropolitan Region is the centre of the maritime economy in Europe. Since 1996, the International Tribunal for the Law of the Sea has also been headquartered in Hamburg.

The maritime economy here is made up of 2,500 firms with around 83,000 employees.

Around 6,300 people work in the ship and boatbuilding sector in Hamburg and the southern Metropolitan Region alone. The innovative core of the maritime economy is formed of shipbuilding, shipbuilding supply industries, marine and offshore technology.
Urban centrality and good information networks are more vital to the media and information businesses than they are to most others. The Hamburg Metropolitan Region offers ideal conditions in an atmosphere fertile with new ideas.

The media and information technology branches employ almost **120,000 people** in over **23,000 businesses**. Alongside the traditional publishing houses and broadcasting stations, a new specialty, **entertainment software**, has grown up. Thus gamigo AG – a leading provider of free online games – is the symbol of Hamburg’s new role as a dynamic game city. The latest developments in the area of digital moving images have also been taken up by the region and are being nurtured under the heading “new TV” trends and market processes in the fields of IPTV, web TV, video-on-demand and mobile TV.
The IT sector accounts for around 8,500 businesses with some 46,000 employees in the Hamburg Metropolitan Region. These include manufacturers of equipment and parts as well as suppliers of data processing services, software and hardware consultancy, multimedia and telecommunications companies.

The Metropolitan Region is a traditional location of publishing, a creative advertising capital, a stronghold of film and centre of high-quality television production.

More than 63,000 people work here in 14,906 companies in advertising, PR, publishing, printing, broadcasting, as well as music, film and television business. Almost 50 per cent of market share of the German popular publishing press is in the hands of the large publishers Axel Springer, Gruner + Jahr and Heinrich Bauer, all of which are based in Hamburg.
The chemical industry was able to develop so well in the Metropolitan Region initially because of the availability of necessary feedstock, such as rock salt. Other raw materials can be brought in inexpensively by the sea route. Crude oil as the base product for the petrochemicals industry is mostly imported, although it is also extracted offshore.

A workforce of 30,000 was employed in the chemicals industry in the Hamburg Metropolitan Region in 2009, generating earnings of around €9.1 billion. The good infrastructure for transporting basic products has led to the regional sector’s concentration on basic chemicals and other feedstock, notably in Brunsbüttel, Hamburg-Harburg, Stade and Walsrode.
Many companies in and around Hamburg manufacture consumer products with household brand names, such as Nivea, Schwarzkopf and Dove. They include Beiersdorf AG, Henkel AG and Unilever.

Outstanding research establishments and universities complete the impressive list of locational advantages. Opportunities for cooperation are offered by associations such as that for the chemicals industry or by ChemCoast e.V., an initiative of the north German chemicals locations, which also represent sectoral interests.
Food production comes into its own primarily in rural areas, where large expanses of land are devoted to grassland management, animal husbandry and arable farming. The “Alte Land” area is known throughout Germany, where every fourth apple consumed is harvested.

The sector is involved in all production stages of onward processing of foodstuffs, bringing added value to the region and securing jobs in industry and commerce. Significant enterprises include Peter Kölln KG in Elmshorn, Nordmilch in Zeven, Nestlé-Schöller in Uelzen and canned sea-food producers Lysell and Appel Feinkost in Cuxhaven.
The food industry's more than 220 companies employ a workforce of some 30,000 people. Companies with fewer than 20 employees are not even included in this figure.

Looking at the whole added value chain, ranging from farmers producing agricultural commodities through to skilled food trade businesses and onward processing, to the high concentration of wholesale and foreign trade around the Port of Hamburg and food retailers, total employment in agribusiness and food industry in the Metropolitan Region adds up to a workforce of 50,000 to 60,000.

Stronger networking between food companies in the region is one of the aims of the lead project “From the Region – For the Region”, launched by Hamburg Metropolitan Region. This should help agricultural companies to improve the positioning of their fresh and processed produce in the regional market. The overall aim of this inter-regional campaign is to strengthen intra-regional economic cycles, raise consumer awareness of regionally produced products and help to reduce CO2 emissions.
Mankind is the focus of life sciences and here Hamburg Metropolitan Region offers scientific and medical expertise, teamed with technical knowhow and industrial performance, whether the aim is to develop new medicines, improve diagnosis or individualise therapy.

In recent years the life sciences sector in the region has bounded ahead. Now it boasts a diverse network of high-tech companies, renowned research institutions and universities aiming to translate innovative ideas into marketable products. Life sciences in and around Hamburg involve some 500 businesses with in excess of 20,000 employees.

Life sciences are an important and promising field for the Metropolitan Region; an economic factor with high innovative and labour-market potential. An internationally competitive life sciences cluster focusing on medicine, medical technology, biotechnology and pharmaceuticals has developed.
Around **196,000 employees** in more than 800 occupations in health care keep the Hamburg Metropolitan Region fit for the future. The special feature of the region is that the whole spectrum of health care management, in all its aspects, is catered for. The core is made up of inpatient and outpatient care of the population, provided by around **80** excellently equipped **hospitals**, as well as myriad specialist medical practices. Then the wider health care economy of course consists of pharmacies, health funds, health and spa businesses as well as the life sciences sector, already mentioned.

In addition to the classical health care management areas, new trends are growing fast, such as **e-health** and **wellness**. The Metropolitan Region is well placed to serve both, thanks to its strengths in IT and tourism – not only because of the established health resort culture in Cuxhaven, Segeberg and Uelzen districts – and offers a range of investment opportunities.

The German Education and Research Ministry’s accolade to Hamburg as “health region of the future” has underscored the strengths of this region, where, for example, the newly established health care management agency, Agentur Gesundheitswirtschaft Hamburg GmbH, plays a key role in forming networks.

**Health care management**
Engineering

Throughout Germany, engineering as a sector is an above-average exporter; this is also the case in Hamburg. Most companies were able to weather the crisis well. Around 34,000 employees in the region work in this sector.

Smaller companies form the backbone of the sector, but large enterprises, such as the Körber group or Jungheinrich are also headquartered in the region. Through their supplier and purchasing activities, companies are also closely connected with many other sectors.
This means that the engineering businesses in the Hamburg Metropoli-
tan Region offer highly **specialised products** for manufacturing
industry. It is not uncommon for a company to be a global leader in its
product niche or at least one of the front-runners, such as, for example,
production plant for the tobacco industry, coin testing or fork-lifts.

**Skilled workers** for the sector are trained in the many educational
establishments in the Metropolitan Region. The sector benefits from the
wide-ranging scope of education and research at the Hamburg-Harburg
University of Technology, Lüneburg University, the Nordakademie in
Elmshorn, **DESY** and the **GKSS** Research Centre at Geesthacht.

The **Fraunhofer institute** for silicon technology (**ISIT**) in Itzehoe is one of Europe’s leading research cen-
tres for microelectronics and microsystems technology. Fo-
cusing on microsystems technology, IC technology, chemical
mechanical polishing (CMP) and biotechnology, around 150
scientists are working for our future.
Renewable energies

The renewable energy sector is developing at breakneck speed: most of the company set-ups or relocations of established companies took place in the past five years. Leading-edge technologies with an international reputation are emerging in the Metropolitan Region. Constant winds and wide-open landscapes between the Elbe River, North and Baltic seas provide optimal conditions for wind power.

On the North Sea coast a unique concentration of companies and institutions concerned with wind power has grown up. It is made up of manufacturers of wind farms, services companies and suppliers. Both the second biggest producer of wind energy equipment, REpower Systems AG, and PNE Wind AG, which plans and operates international wind farms, are based in the Metropolitan Region. The development of offshore technology is a huge opportunity to strengthen the economic base of the production and loading centres of Brunsbüttel and Cuxhaven, where Cuxhaven Steel Construction GmbH and AMBAU GmbH have recently located.
Agriculture and forestry are also being more strongly integrated into producing power from **biomass**. Numerous biogas plants, particularly farm units of up to 500 W, but also large municipal plants generating more than 1.4 MW have been built in the Hamburg Metropolitan Region in recent years. One such example is the NovusEnergy GmbH biomass power plant in **ChemCoast Park**, Brunsbüttel. The focus of biogas production in the Metropolitan Region, on the other hand, is located in the districts of **Rotenburg (Wümme)**, with around 90 plants, and **Soltau-Fallingbostel** with 80.

Skilled trades firms contribute to value-added, particularly through sales, installation and maintenance of the plant. Energy traders in the Metropolitan Region specialised in renewable energies are also gaining a growing market share.
Tourism

Picturesque cities like the Hanseatic city of Lüneburg or Stade, more than 1,000 years old, are as strong an attraction to visitors as Hamburg is as a shopping capital. Water also plays an important role in the tourism business of the region. Its fascination draws visitors to the Wadden Sea Unesco World Heritage Site in Cuxhaven and Büsum on the North Sea coast, to watch the busy port activity in Hamburg, to the Unesco Elbtalaue Biosphere Reserve and also to the many canals and river tributaries. This range of attractions is complemented by incomparable stretches of recreational landscape: the Lüneburg Heath, the Alte Land and Lauenburg Lake District are just some of the more outstanding examples of the many holiday destinations.

Tourism in the Hamburg Metropolitan Region is a key economic factor and crucial engine of growth. The tourism economy safeguards in excess of 175,000 location-specific jobs in the region.
The trend in **overnight tourism** has continued positively in recent years. The choice of cultural and event opportunities in Hamburg is a decisive factor. Overall, the Metropolitan Region attracts about 7.5 million visitors every year, which adds up to a good **18.6 million commercial overnight stays**.

**Day visitors** are the second mainstay of tourism. Everyday some **688,000 day visitors** are out and about in the region; most visitors to Hamburg come from the Metropolitan Region itself. At the weekends in particular the flow is reversed, with many Hamburg residents taking to the region for trips to the North and Baltic seas, or into the hinterland. Each year the **198 million day visitors** generate sales of about **€ 6.17 billion**.
According to “Emerging trends in real estate Europe”, the study produced by PriceWaterhouseCoopers and the Urban Land Institute, the Hamburg Metropolitan Region is one of the most attractive real estate markets in Europe. When it comes to investment prospects, Hamburg is a leader. Compared with other regions, the Hamburg Metropolitan Region wins extra points for its stable market conditions.

With regard to availability of commercial sites the Metropolitan Region offers a heterogeneous picture. The market reacts to supply and demand. And prospective purchasers are looking for well-connected sites in proximity to the port, in the centre of Hamburg or along major transport routes. With growing demand from the logistics industry for large and contiguous areas, prospects for commercial sites in the Metropolitan Region are also improving.

This is why one of the Metropolitan Region’s most important lead projects centres on pooling regional strengths in developing and marketing public commercial space, to ensure that available high quality commercial sites is on tap for every investor in future.
It just takes a few clicks in the GEFIS commercial and industrial online information system for investors to pinpoint available locations throughout the Metropolitan Region. On average, GEFIS contains opportunities on more than 320 industrial estates. GEFIS bundles data from the existing portals of the three states that comprise the Metropolitan Region. The joint portal received a subsidy of €35,000 from the Metropolitan Region promotion fund.

www.metropolregion.hamburg.de/gefis

Using the GEFIS search screen, choosing basic settings such as the preferred area, an approximation of the planned space required, area designation and, finally, transport connections. In a next step, the user is presented with a list of commercial sites on offer. If the results are not satisfactory, another attempt with altered criteria can be made – or contact made with the local business development agency concerned.
The search results offer the facility of examining the details of the various commercial sites. If there are any remaining questions or if there is interest in a particular site, the contact address is also provided, with the name of the person responsible. Alternatively an impression of the surroundings of a particular piece of real estate can be seen in the Metropolitan Region geoportal. Simply click “show in map”. This way you may perhaps come across more suitable sites in the immediate vicinity.

Since only public land is offered via the GEFIS database at present, the Hamburg private commercial real estate database – HDB – is a useful complement to it (www.hdb-hamburg.com).
The region has outstanding locational advantages and plentiful sites in reserve, but any offering is open to improvement. That is why the lead project “Cooperation on commercial space development” is setting new standards in regional cooperation. The quantitative and qualitative requirements businesses have regarding future commercial sites were collated on the basis of an academic study and compared against space available on the market. The results provide regional planners and business development agencies with crucial indications of how best to coordinate and develop commercial real estate and position it for nationwide demand in the future. The so-called commercial development sites are to become premium locations for the lead sectors of the region in future.
Rural and urban qualities of life blend together in the Metropolitan Region in a special way. Maritime culture and Hanseatic tradition are very much alive in many places. A dense transport network that is in line for further development in future makes journey times within the region manageable. The efficient Hamburg local transport system (HVV) is one infrastructure cornerstone, with a reach far into the Metropolitan Region; it guarantees trouble-free journeys for hundreds of thousands of commuters every day.

Improving parking space for commuters

The Hamburg Metropolitan Region is involved in modernising infrastructure around the region’s railway stations. This is helping to shift traffic from road onto rail. At the same time, it cuts down on CO2 emissions in the region, making an active contribution to climate protection. Many new park & ride or bike & ride facilities have been subsidised out of the Metropolitan Region’s promotion funds. Extension of the rapid transit line (S-Bahn) from Hamburg to Stade received substantial aid.
We're thinking ahead for you:

Apple of our eye:

Our up and coming talent

Every year, large, broad-based universities, smaller, specialised establishments and comparatively new universities of a new type attract a growing number of new undergraduates to the region. Around 86,000 students study at a total of 25 universities in the Metropolitan Region. More than 10,000 students come from abroad.

In addition to Hamburg University, every year students from Germany and around the world choose to enrol at the new HafenCity University, Hamburg-Harburg University of Technology (TUHH), the Hamburg University of Applied Sciences (HAW), the Helmut Schmidt University, the private Bucerius Law School, the business-sponsored Hamburg School of Business Administration (HSBA), Leuphana University in Lüneburg, and the Academy for Renewable Energies in Lüchow, to name just a few.

Vocational training is offered by numerous technical colleges of higher education, such as those in Heide, Stade and Wedel, and by the Hochschule 21 college in Buxtehude. But particular situations demand specific solutions. A good example of this is the further training scheme tailored to older unemployed to relieve bottlenecks in the logistics and port services business.
Research and innovation

The region has first-class universities and excellent research institutions with a global reach, which challenge creative brains and attract students and academics from all over the world. The work and ideas of more than 9,000 researchers lead to innovations and new knowhow which can be adapted for use in business.

A wide spectrum of highly specialised research establishments and institutes complete the multifaceted range of public and private teaching and education opportunities in the Hamburg Metropolitan Region. Thus, the research centre in Borstel belongs to the German cluster of excellence for infection research. The centres for fundamental research, DESY in Hamburg and GKSS in Geesthacht, part of the Helmholtz Community, both run by the German federal states, have not only contributed to new findings in science, but have repeatedly generated successful corporate spin-offs in the past.
The Metropolitan Region’s promotion funds also support the training of skilled workers in new innovative fields, such as materials processing using laser technology. The new Laserzentrum Nord also received €300,000 investment from the Metropolitan Region promotion funds.

There is a particular focus on technology transfer in the Metropolitan Region. Special institutions such as the CFK research centre in Stade, concentrate on integrating carbon fibre reinforced plastics into aircraft and other transport systems.

Young start-up companies get help in the initial stages from MARICUBE in Büsum, which researches marine biotechnology. The Jork research centre concentrates on improving fruit growing conditions.

In Hamburg, TUTECH GmbH provides advice to technology-oriented firms, relaying research outcomes and helping them to acquire state support.
Service on the spot: business development agencies

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Service on the spot: business development agencies

You will find all the business development agencies at:
http://english.metropolregion.hamburg.de/business-development/
The Hamburg Metropolitan Region is a voluntary cooperation between the districts of Dithmarschen, Duchy of Lauenburg, Pinneberg, Segeberg, Steinburg and Stormarn in Schleswig-Holstein and Cuxhaven, Harburg, Lüchow-Dannenberg, Lüneburg, Rotenburg (Wümme), Soldtaw-Fallingbostel, Stade and Uelzen in Lower Saxony, as well as the three federal states of Hamburg, Schleswig-Holstein and Lower Saxony. Cooperation focuses on international competitiveness, public services, spatial development and climate protection/climate change management.

Management and organisation of the cooperation is the responsibility of the bodies of the Metropolitan Region: the Regional Council, the Steering Committee and the seven Expert Groups. The Secretariat operates out of central Hamburg. It coordinates the work of all parties concerned, facilitates preparation and implementation of decisions, drafts the operative programme, organises workshops and congresses. It compiles the finance plan, is responsible for public relations, obtains expertise and expert opinion, and is the public face of the Hamburg Metropolitan Region.
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