

## Population

	2014		2014
Total inhabitants in millions Hamburg (metropolitan region)	1.76 (5)	Foreign nationals	245,186
Female	905,345	Private households	977,000
Male	857,446	Single-person households	503,000
Under 18 years of age (%)	16.1	Arrivals	91,594
18 to 60 years of age (%)	60.0	Departures	78,218
60 years and above (%)	23.9		

## Population

### Foreign inhabitants in Hamburg, 31 Dec. 2015

Nationality (country)	Total foreign Population	Male	Female
<b>Turkey</b>	<b>45,541</b>	<b>23,994</b>	<b>21,547</b>
Poland	28,571	14,831	13,740
Afghanistan	14,600	8,463	6,137
Portugal	9,962	5,345	4,617
Russia Federation	8,339	3,132	5,207
Bulgaria	8,248	4,412	3,836
Romania	8,196	4,727	3,469
Italy	7,813	4,698	3,115

## Population

### German federal states (figures at end of year)

Federal state	Population in 1,000 2013	Population in 1,000 2014	Federal state	Population in 1,000 2013	Population in 1,000 2014
Baden-Württemberg	10,631	10,717	Lower Saxony	7,791	7,827
Bavaria	12,604	12,692	North Rhine-Westphalia	17,572	17,638
Berlin	3,422	3,470	Rhineland-Palatinate	3,994	4,012
Brandenburg	2,449	2,458	Saarland	991	989
Bremen	657	662	Saxony	4,046	4,055
<b>Hamburg</b>	1,746	1,763	Saxony-Anhalt	2,245	2,236
Hesse	6,045	6,094	Schleswig-Holstein	2,816	2,831
Mecklenburg-Western Pomerania	1,597	1,599	Thuringia	2,161	2,157

## Population

### Purchasing power by federal state (PPI D = 100)

Federal state	Purchasing power 2014	Purchasing power 2015	Federal state	Purchasing power 2014	Purchasing power 2015
Baden-Württemberg	107,2	107,0	Lower Saxony	97,3	97,3
Bavaria	108,1	107,9	North Rhine-Westphalia	99,9	99,9
Berlin	92,8	92,9	Rhineland-Palatinate	99,0	98,8
Brandenburg	89,9	90,4	Saarland	93,6	93,4
Bremen	94,2	93,8	Saxony	85,5	85,9
<b>Hamburg</b>	<b>111,7</b>	<b>111,3</b>	Saxony-Anhalt	84,2	84,5
Hesse	106,0	105,9	Schleswig-Holstein	100,8	100,9
Mecklenburg-Western Pomerania	83,5	84,2	Thuringia	85,2	85,4

## Population

### Retail spending capacity by federal state in 2015

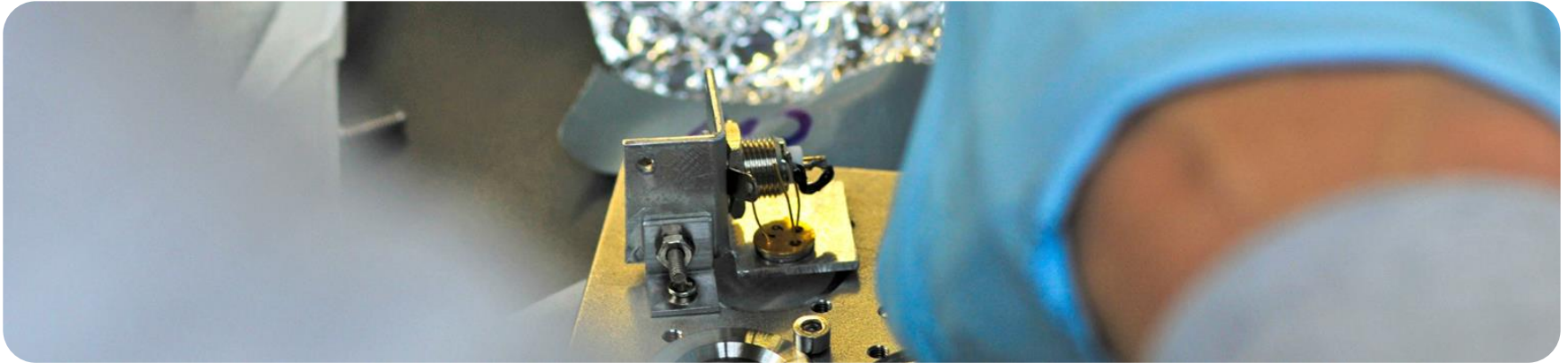
Federal state	Retail spending capacity (€ per capita)	Federal state	Retail spending capacity (€ per capita)
Baden-Württemberg	23.398	Lower Saxony	21.282
Bavaria	23.597	North Rhine-Westphalia	21.850
Berlin	20.303	Rhineland-Palatinate	21.604
Brandenburg	19.764	Saarland	20.417
Bremen	20.513	Saxony	18.782
<b>Hamburg</b>	<b>24.331</b>	Saxony-Anhalt	18.478
Hesse	23.151	Schleswig-Holstein	22.064
Mecklenburg-Western Pomerania	18.410	Thuringia	18.666



## Education

- ▶ Daycare centres meet highest standards
- ▶ Elementary schools offer foreign language classes
- ▶ Schools with an international orientation, such as the Lycée Francais and International School Hamburg
- ▶ Broad spectrum of general secondary schools and vocational schools

Bild: [www.mediaserver.hamburg.de/R.Hegeler](http://www.mediaserver.hamburg.de/R.Hegeler) 944



## Education

- ▶ 19 accredited state or private colleges/universities in Hamburg
- ▶ Colleges/Universities in the greater metropolitan region
- ▶ Academic home of approx. 96,300 students, including 10,700 international students
- ▶ 15,000 researchers/scientists, 300 research institutes
- ▶ R&D centres of large corporations and SME

## Real Estate Market

### Office space market data, Hamburg vs. other German cities 2015

	Hamburg	Düsseldorf	Berlin	Munich (region)
Turnover (sqm)	527,000	414,600	940,800	750,500
Vacancy rate in %	5.5	9.9	3.6	4.7
Top leasing rate €/sqm	25.00	26.00	24.30	34.00
Average leasing rate €/sqm	14,50	14,20	14,80	16,10



## Real Estate Market

### Office space submarkets

Submarket	Rent price range (€/ sqm/ month)	Submarket	Rent price range (€/ sqm/ month)
Inner city	11.00 – 27.00	Altona/St.Pauli	8.00 – 24.00
Port	12.00 – 23.00	City Süd	8.00 – 14.00
HafenCity	15.50 – 24.00	Harburg	7.00 – 13.00
Alster (west)	11.00 – 24.00	City Nord	7.00 – 14.00
Alster (east)	10.00 – 18.50	Airport	7.00 – 12.00
St. Georg	7.50 – 14.50	West	7.00 – 13.50
Eppendorf	8.00 – 15.00	East	6.00 – 11.00

## Labour Market

	2013	2014
Employees subject to social insurance contribution (As at June 30)	873,665	892,508
Unemployed rate (Annual average)	7.4 %	7.6 %
Number of unemployed (Annual average)	71,559	73,663

## Labour Market

Employees subject to social insurance contribution by sectors	30.06.2013	30.06.2014
Agriculture and forestry, fishery	894	957
Manufacturing industry	112,357	114,087
Construction	28,314	29,248
Trade	135,379	135,265
Transport and warehousing	78,866	79,614
Hospitality	31,686	33,134
Corporate services	286,228	295,307
Public and private service providers	199,920	204,876

## Labour Market

### Average earnings of full-time employees in 2014

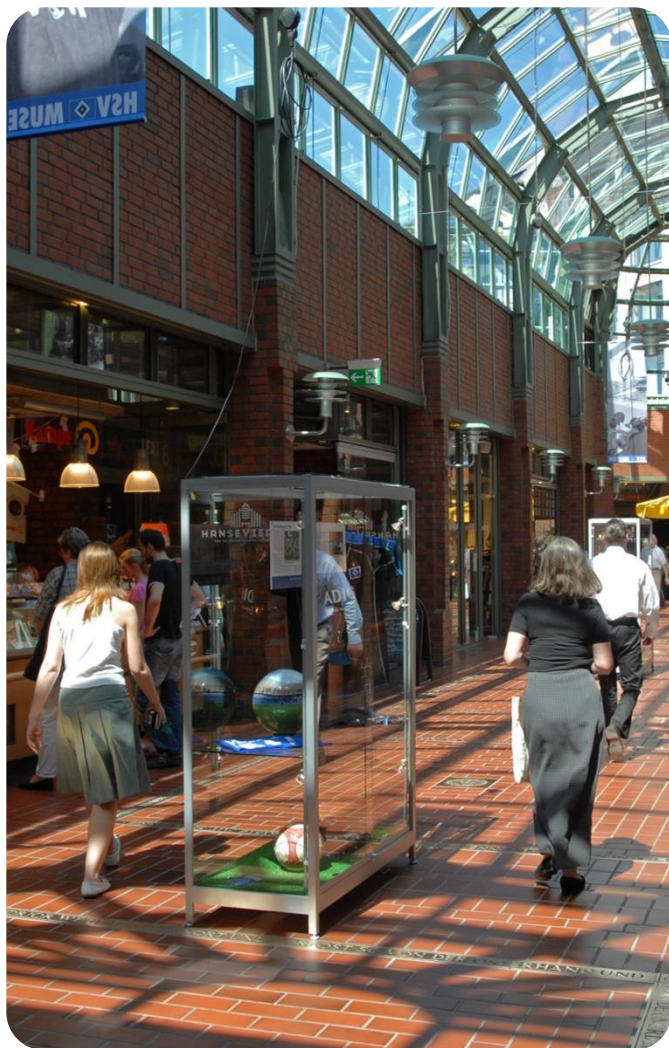
Average earnings by sectors	Gross income in €
Manufacturing industry	4,321
Processing industry	4,685
Construction	3,248
Services	3,849
Trade	3,819
Transport and warehousing	3,552
Hospitality	2,156
Information and communication	4,894

## Gross value added by sectors in million €

Economic sectors	92.772 million € total
Agriculture	63
Manufacturing industry	13,366
Construction	2,208
Trade, Hospitality, Transport	29,416
Financing, Leasing, Corporate services	30,609
Public & private service providers	17,110

## Gross domestic product in million €

2011	2012	2013	2014
95,915	97,577	99,468	103,145
(+1.4%)	(+1.7%)	(+1.9%)	(+3.7%)



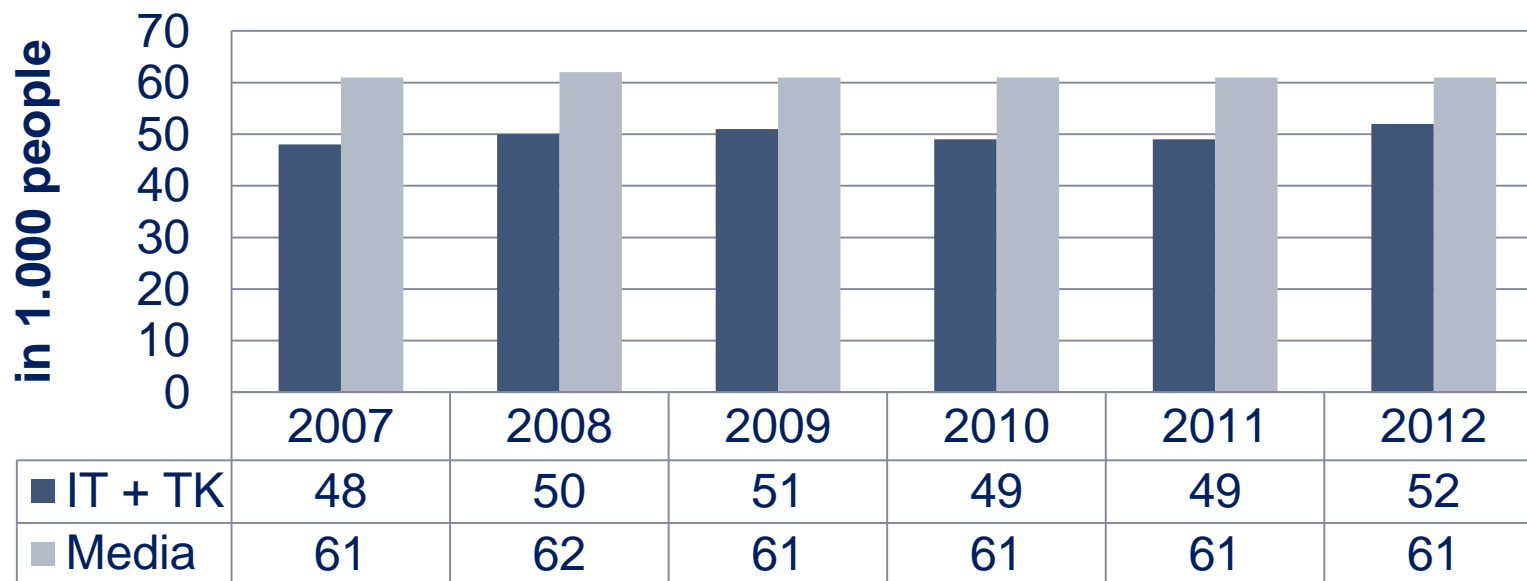


## Media, IT and Telecommunication

- ▶ 23,514 media, IT and telecommunication companies <sup>(1)</sup>
- ▶ Of these, 13,857 are media enterprises <sup>(1)</sup> with some 61,000 employees <sup>(2)</sup>
- ▶ The IT sector comprises nearly 9,657 companies <sup>(1)</sup> and approx. 52,000 jobholders <sup>(2)</sup>

## Media, IT and Telecommunication

### Employees





## Media, IT and Telecommunication

- ▶ Hamburg is Germany's undisputed capital of magazine publishing
- ▶ 15 of the 20 highest-circulation commercial magazines are headquartered in Hamburg
- ▶ Major publishers: Axel Springer Verlag, Gruner+Jahr, Bauer Media Group
- ▶ Hamburg is an important centre of audio-visual media production (film and television)
- ▶ Germany's third-largest broadcasting corporation, NDR, is based in Hamburg
- ▶ The region's film industry comprises approx. 1,056 enterprises <sup>(1)</sup>

## Media, IT and Telecommunication

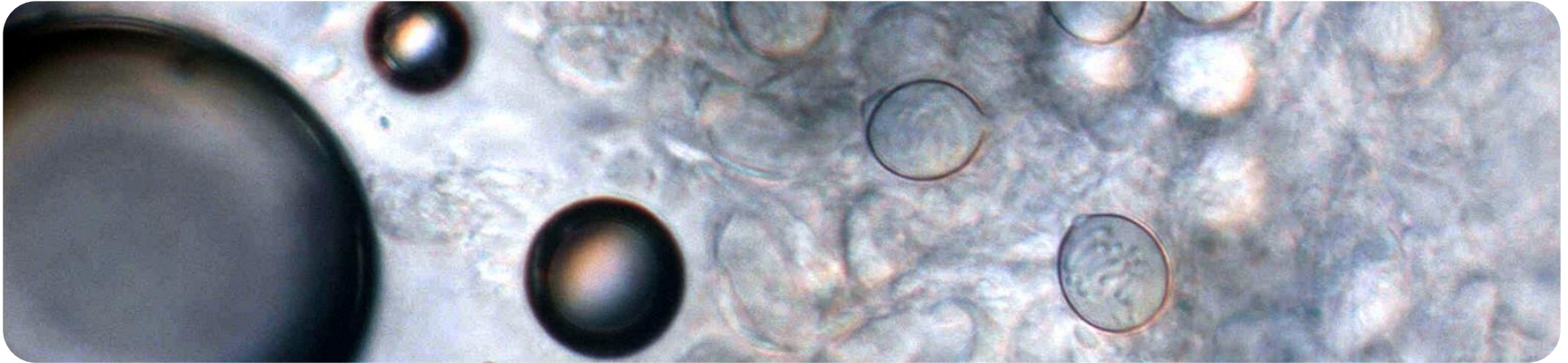
- ▶ 6,931 companies <sup>(1)</sup> are involved in advertising
- ▶ Some well-known agencies are: FCB, Jung v. Matt, Scholz & Friends and also Grabarz & Partner, Kolle Rebbe, Philipp & Keuntje, KNSK or Zum Goldenen Hirschen
- ▶ Hamburg's advertisers are highly regarded for their exceptional creativity, and have received distinctions at the New York Festival and in Cannes or the ADC competition

## Media, IT and Telecommunication

- ▶ More than 100 institutes offer training in the fields of media and IT
- ▶ The Hamburg Media School is a premium provider of training in media management, journalism and film
- ▶ The Miami Ad School in Hamburg is the first European branch of the highly acclaimed US-based advertising school
- ▶ The Media Academy located on the premises of Studio Hamburg offers training in film and television
- ▶ Opened in April 2008, the Funk & TV Akademie Hamburg (FTVA) is the newest high-profile training institution in the field of media

## Creative Professions

- ▶ „Advertising and design made in Hamburg” has occupied the top spot in domestic and international location rankings for years
- ▶ Culture and Creative sector: 21,136 companies
- ▶ Design companies: 6,681
- ▶ Advertising: 5,993 companies
- ▶ Software/gaming enterprises: 1,847
- ▶ The “designxport” is the dedicated regional design industry centre in the HafenCity

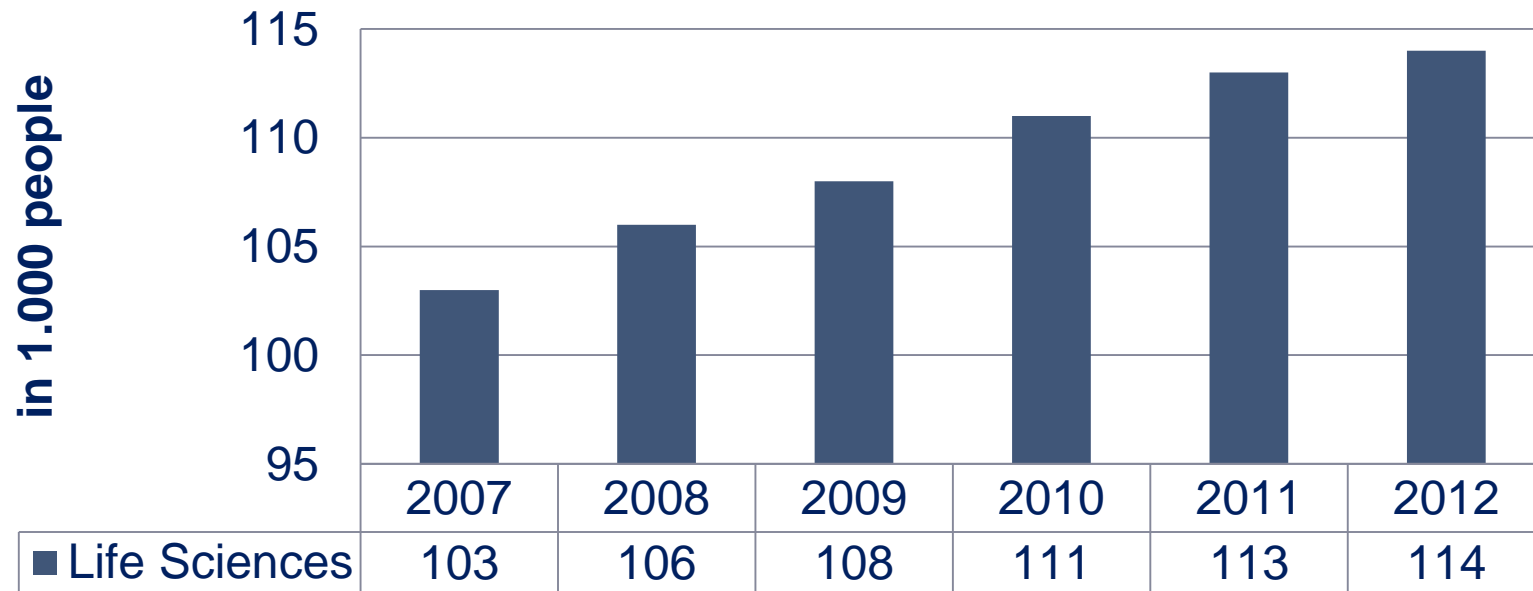


## Life Sciences

- ▶ Stable employment figures in biomedical sciences and healthcare industry
- ▶ Approx. 132,000 employees in the healthcare industry
- ▶ Major corporations: Philips Medical Systems DMC GmbH and Olympus Medical Systems Europe GmbH in Hamburg and Dräger Medical, Ethicon, Söring und Eska Implants in Schleswig-Holstein
- ▶ Excellent know-how in medical engineering and biotechnology, global leader in expertise in certain fields

## Life Sciences

### Employees



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## Nanotechnologie

- ▶ More than 30 teams at universities and research institutes conducting nanotechnology research
- ▶ Networking nanotechnology expertise: the interdisciplinary Hamburg Nanoscience Centre (INCH)
- ▶ The Hamburg metropolitan region is home to nanotechnology companies that focus exclusively on the development and production of nanomaterials for a diverse range of applications
- ▶ Global players like Beiersdorf, Philips or the biotech companies Evotec AG and Eppendorf Deutschland utilize nanotechnology for their products



## Renewable Energy

- ▶ The Hanseatic city seeks to achieve 100% use of green electricity in municipal facilities
- ▶ Consistent implementation and further development of climate protection concept with 277 projects and individual measures
- ▶ Earth Hour – Hamburg participates in worldwide project



## Renewable Energy

### ▶ Wind power

- ▶ Large-scale offshore wind farms in Brunsbüttel and Cuxhaven
- ▶ Nordex-Group, Senvion SE, General Electric (GE)
- ▶ Plambeck, PNE Wind AG, Vestas

### ▶ Solar energy

- ▶ Conergy AG - regenerative energy systems for generating power, heat and cooling from sunlight
- ▶ Sharp Electronics - support for the new climate protection policy
- ▶ SOLARA by Centrosolar AG – in the Hamburg metropolitan region
- ▶ Aurubis AG – development of copper-based photovoltaic cells

### ▶ Biogas

- ▶ NovusEnergy GmbH at ChemCoast Park Brunsbüttel
- ▶ BLOWATT Energy GmbH and cogeneration unit manufacturer Dreyer & Bosse are competent partners for the planning and construction of new facilities

## Renewable Energy

### ▶ Research and development

- ▶ Companies cooperate with the Hamburg University of Applied Sciences (HAW) and Hamburg University of Technology (TUHH), Helmut Schmidt University, and other colleges/universities in the Hamburg metropolitan region
- ▶ Competence centre CEwind combines the research activities of the universities of Schleswig-Holstein in the field of wind energy technology
- ▶ Projects in hydrogen and fuel cell technology conducted by research institutes in Hamburg, Geesthacht, Kiel and Lübeck

## Renewable Energy

### ▶ **Business development networks**

- ▶ Various protagonists in the fields of research and development, qualification, advanced training and testing cooperate with the Niedersachsen Netzwerk Nachwachsende Rohstoffe (Lower Saxon network for renewable primary products)
- ▶ The Universities of applied sciences in Kiel, Flensburg, Lübeck and the Universities of Kiel and Flensburg have built a competence network for biomass utilization
- ▶ Windcomm is a joint project of the North Frisian Business Development Corporation (WFG Nordfriesland) and the Brunsbüttel Development Company (egeb, Entwicklungsgesellschaft Brunsbüttel)



## Aviation Industry

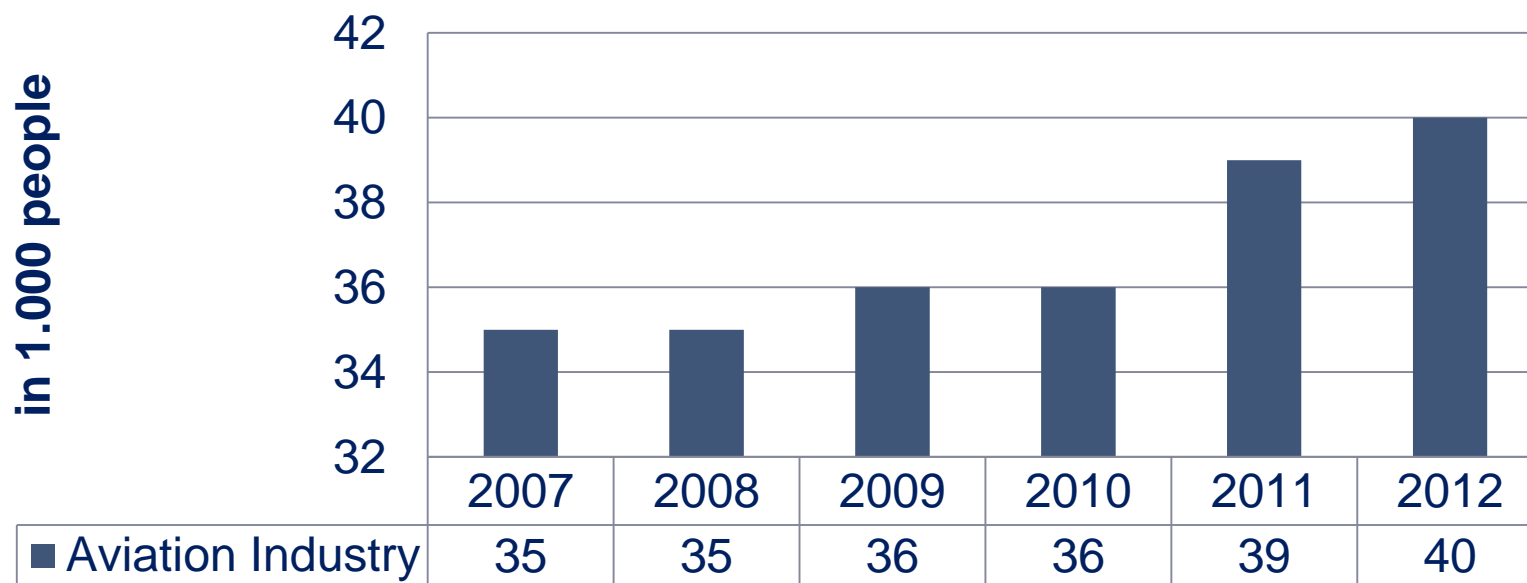
- ▶ Hamburg ranks as the third-largest centre of the civil aviation industry, after Seattle and Toulouse and is the world's leading competence centre for "cabins/ cabin systems"
- ▶ The industrial expertise is founded on the Airbus facilities in Finkenwerder, Lufthansa Technik AG, Hamburg Airport, numerous suppliers, specialized engineering firms, service providers, universities and academic research institutes

## Aviation Industry

- ▶ All aspects of aircraft construction are represented in Hamburg: from the design, manufacture and fitting out, to the global system of air transportation, maintenance, repair and overhaul, and finally to recycling
- ▶ More than 40,000 employees
- ▶ Big player: Airbus Deutschland GmbH, Lufthansa Technik AG, Hamburg Airport (incl. other airport-based companies)
- ▶ More than 300 suppliers

## Aviation Industry

### Employees



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## Aviation Industry

- ▶ **Research and qualification network**
  - ▶ Helmut Schmidt University (HSU)
  - ▶ Hamburg University of Applied Sciences (HAW)
  - ▶ Hamburg University of Technology (TUHH)
  - ▶ University of Hamburg
  - ▶ Two institutions of the German Aerospace Center (DLR)
  - ▶ ZAL Centre of Applied Aeronautical Research
  - ▶ HCAT Hamburg Centre of Aviation Training
  - ▶ Helmholtz Centre Geesthacht (HZG)
  - ▶ Technology Centre Hamburg-Finkenwerder (THF)
  - ▶ Colleges/universities in the Hamburg metropolitan region



## Logistics

- ▶ Europe's No.1 in container rail transport
- ▶ Hamburg: No.1 in sea freight shipping to Northern and Eastern Europe
- ▶ Hamburg is an important node in the European waterway network
- ▶ Hamburg has one of Europe's most modern airports
- ▶ Hamburg is centrally integrated into Europe's perfectly developed road system



## Logistics

- ▶ 380,000 employees in the metropolitan region
- ▶ Great employment potential (for both high- and low-skill labour)
- ▶ more than 11,500 logistics enterprises in the metropolitan region
- ▶ is the location with the best image in Europe
- ▶ is Germany's most dynamic logistics industry location
- ▶ with the port as the “heart of the logistics sector”

## Logistics

### ▶ Research and development

- ▶ Hamburg is the centre of the dual vocational training in logistics, and home to Germany's largest vocational school in forwarding and logistics services
- ▶ The city's many educational institutions ensure initial and further training on all qualification levels
- ▶ In the Hamburg Metropolitan Area, 17 universities and some 37 institutes in the logistics sector offer degree course in logistics both in English and German, and cover a wide spectrum of logistics research
- ▶ Corner pillars of the industry are the Fraunhofer Center for Maritime Logistics, the Hamburg Logistics Institute (HLI) as specialist for Auto-ID research, the Institute for Machine Elements and Technical Logistics at the University of the German Federal Armed Forces, and the Institute for Transport Planning and Logistics of the University of Technology Hamburg-Harburg with its focus on sustainability