

## Sector-specific opportunities

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*[Source: UK Trade & Investment (Feb 2016)]*

### Aerospace sector

The German aerospace industry is the third largest in Europe after the UK and France. German's aerospace sector specialises in structures, cabin systems, engines and Maintenance, Repair and Operations (MRO).

The industry has grown by an average of 8% per year since the mid-1990s. 15% of annual turnover (EUR €4.6 billion) is spent on Research and Development (R&D).

Opportunities for UK companies include:

- system suppliers
- resolving capacity problems
- special processes
- components including 'legacy' parts

*[Source: UK Trade & Investment (Feb 2016)]*

### Automotive sector

Germany remains a major manufacturing location for the automotive sector. More than EUR €17 billion was invested in R&D in Germany's automotive sector in 2013.

The German automotive sector is currently concentrating on:

- improving petrol and diesel vehicle efficiency

- developing hybrids and electric vehicles
- fuel cells
- alternative fuels

Opportunities for UK companies include:

- specialised vehicles
- specialised products and components
- technologies, composites, products, systems for alternative vehicles/drives
- motorsport
- classic car market

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*[Source: UK Trade & Investment (Feb 2016)]*

### Biopharma sector

Germany has the largest biopharma industry in Europe with 900 dedicated biotechnology companies and 25 different biotech groups.

There are opportunities for UK companies in:

- medtech or 'red biotechnology'
- nanotechnology
- industrial or 'white biotechnology'
- agricultural or 'green biotechnology'
- innovative chemistry/novel biotech

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*[Source: UK Trade & Investment (Feb 2016)]*

## Chemicals sector

The EUR €186.5 billion German chemical industry is the largest in Europe and the fourth largest worldwide.

There are opportunities for UK companies in:

- agricultural or 'green biotechnology'
- innovative chemistry/novel biotech
- renewable energies
- sophisticated storage
- materials or applications in green or future technologies

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*[Source: UK Trade & Investment (Feb 2016)]*

## Consumer goods/retail sector

With a population of 82 million, Germany is Europe's largest consumer market. One third of the population is over 50 and controls half of the total consumer spending power.

The market:

- is decentralised with several metropolitan regions
- offers easy access to other German speaking countries and Eastern European regions
- has a value of EUR €400 billion – representing 4% of the worldwide consumer goods trade

Quality remains a top priority for German consumers. Online shopping generated turnover of EUR €33 billion in 2013. There are huge opportunities for UK companies in this sector. Further rapid growth is expected with:

- over half of German consumers doing research on the internet before buying a product
- 36% of e-commerce revenue created by pure online market places

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*[Source: UK Trade & Investment (Feb 2016)]*

### Creative industries sector

Internet is the sole sales channel for 19% of all creative small businesses in Germany.

More than 10% annual growth is expected over the next four years for games. Germany is the third largest market for music worldwide. 'Crowdfunding' can be used to test for the potential success of music, film or games content in the German market.

Opportunities for UK companies include:

- music including streaming
- films
- books, publishing
- advertising
- games for mobile devices and online
- architecture and design
- performing arts

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*[Source: UK Trade & Investment (Feb 2016)]*

### Education sector

Germany is one of the biggest educational markets in Europe. Educational spending includes:

- EUR €131.6 billion on pre-school, secondary and post-secondary school and university education
- EUR €5.6 billion on teaching materials and extra school lessons
- EUR €10 billion on corporate training and development
- EUR €10.6 billion on nursery schools, after school care centres and adult education centres

There are opportunities for UK companies for:

- language training and language exchange
- high quality and innovative educational products
- digitisation in schools

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*[Source: UK Trade & Investment (Feb 2016)]*

Energy and environment sector

German energy policy aims to reduce greenhouse gas emissions by 40% by 2020. Renewable generation (31%) has now surpassed that of lignite (26.1%) in 2014. Wind energy produces 8.9% of total German energy consumption.

The renewables sector is growing due to the nuclear exit.

There are opportunities throughout the renewables sector, such as:

- smart metering
- insulation products
- heating/cooling technologies
- cogeneration systems
- pumps, compressed air systems
- energy efficiency products
- 'green' technologies

- joint product development, project work and R&D

There are also opportunities around major projects including:

- nuclear decommissioning and maintenance
- planned grid expansion with nine new lines covering 2,650 km by 2023

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*[Source: UK Trade & Investment (Feb 2016)]*

### Healthcare sector

The German healthcare market is the largest in Europe and third largest worldwide. It is the biggest sector in the German economy with over EUR €300 billion spent on health in 2012.

Germans are becoming more health conscious and are prepared to pay for products and services which are outside the health system coverage. This can be the case when a product is no longer available on prescription.

Opportunities for UK companies include:

- healthcare products for end consumers
- modern prosthetics
- in-vitro diagnostics
- Telemedicine and Ambient Assisted Living (AAL)
- e-health products and services
- device and system networking

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*[Source: UK Trade & Investment (Feb 2016)]*

### Information and Communications Technology (ICT) sector

Germany's ICT market has a turnover of EUR €150 billion. It is the largest ICT market in Europe and the fourth-largest in the world.

It is also Europe's largest research location. The sector makes up almost a quarter of German applications to the European Patent Office.

Opportunities for UK companies include:

- 'Big Data'
- 'Cloud Computing'
- Information Technology (IT)/cyber security
- mobile security/Bring Your Own Device (BYOD)
- e-commerce
- Internet of Things (IoT) and Machine-to-Machine communication (M2M)

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*[Source: UK Trade & Investment (Feb 2016)]*

Infrastructure sector – rail

Despite liberalisation, Deutsche Bahn AG is still Germany's main railway operator and owner of most of the tracks. Their annual purchasing volume is around EUR €28 billion.

Apply to become a supplier to Deutsche Bahn AG. See: [www.deutschebahn.com](http://www.deutschebahn.com)

There are also opportunities for UK companies to supply:

- integrated IT solutions
- ticketing
- passenger information
- on board entertainment
- materials for refurbishment of rolling stock

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*[Source: UK Trade & Investment (Feb 2016)]*

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