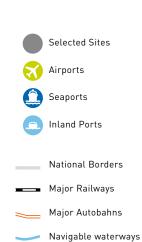
Germany's Chemical and Related Process Industry 2011

A Profile of Selected Investment Sites









Bayer Industrial Park Brun 1 2 ChemCoast Park Brunsbüt

Site Name

- 3 CoastSite Wilhelmshaven
- Dow ValuePark® Stade 4
- 5 IndustriePark Lingen
- Industriepark Walsrode 6
- Honeywell Specialty Chemi 7
- Baltic Industrial Park Schw 8
- 9 Industrial Park Schwedt
- 10 Chemical Site Schwarzheid
- Industrie- und Gewerbepar 11
- Agro-Chemie Park Piesteri 12
- 13 ChemiePark Bitterfeld Wol
- 14 Dow ValuePark®
- Chemical Site Leuna 15
- Industriepark Schwarze Pu 16
- Marl Chemical Park 17
- 18 Dorsten-Marl Industrial Pa
- Chemical Park RÜTGERS 19 20
 - Gelsenkirchen Site
- Deutsche Gasrußwerke 21
- 22 Chemiepark Bayer Scherin 23
- CHEMPARK Krefeld-Uerdin 24 Bayer Schering Pharma AG
- Industriepark Oberbruch 25
 - CHEMPARK Dormagen
- 26 CHEMPARK Leverkusen 27
- Chemical Industrial Park K 28
- 29 Industriepark Niederau
- 30 Evonik Degussa GmbH Plar
- 31 AllessaChemie GmbH Fech
- 32 Industriepark Höchst
- 33 Wolfgang Industrial Park
- 34 Industriepark Kalle-Albert
- BASF Ludwigshafen 35
- 36 Industrie Center Obernburg
- 37 Werk Gendorf Industrial Pa
- 38 Industriepark Gersthofen
- 39 INFRARHOD

| | Location | Page |
|--------------|-----------------------|------|
| nsbüttel | Brunsbüttel | 18 |
| ttel | Brunsbüttel | 20 |
| | Wilhelmshaven | 22 |
| | Stade | 24 |
| | Lingen | 26 |
| | Walsrode-Bomlitz | 28 |
| icals Seelze | Seelze | 30 |
| werin | Schwerin | 32 |
| | Schwedt | 34 |
| de | Schwarzheide | 36 |
| rk Altmark | Arneburg | 38 |
| itz | Wittenberg-Piesteritz | 40 |
| lfen | Bitterfeld Wolfen | 42 |
| | Schkopau | 44 |
| | Leuna | 46 |
| umpe | Spremberg | 48 |
| | Marl | 50 |
| ark | Dorsten/Marl | 52 |
| | Castrop-Rauxel | 54 |
| | Gelsenkirchen | 56 |
| | Dortmund | 58 |
| ng Pharma | Bergkamen | 60 |
| ngen | Krefeld-Uerdingen | 62 |
| G | Wuppertal Elberfeld | 64 |
| | Heinsberg | 66 |
| | Dormagen | 68 |
| | Leverkusen | 70 |
| Knapsack | Knapsack-Hürth | 72 |
| | Düren | 74 |
| nt Lülsdorf | Lülsdorf | 76 |
| nenheim | Fechenheim | 78 |
| | Frankfurt/Höchst | 80 |
| | Hanau | 82 |
| t | Wiesbaden | 84 |
| | Ludwigshafen | 86 |
| g | Obernburg | 88 |
| ark | Gendorf/Burgkirchen | 90 |
| | Gersthofen | 92 |
| | Freiburg | 94 |
| | | |

| Welcome Address | 5 |
|---|----------|
| Industry Overview | 6 |
| Opportunities and Benefits for Investors | 7 |
| Challenge and change | 7 |
| ■ Infrastructure | 8 |
| ■ Synergies | 9 |
| First-class facilities and well trained personnel | 9 |
| Benefits for other process industry investors | 10 |
| Investors benefit from efficient authorization | 11 |
| Plug & play concept | 12 13 |
| Energy security makes Germany attractive Diversity of supply | 13 |
| Diversity of supply Innovation | 13 |
| Chemical parks benefit from secure power | 14 |
| Incentives for investment projects | 14 |
| Competitive tax system | 15 |
| Synergies at Profiled Locations | 16 |
| Site Profiles in Detail | 18 |
| Germany Trade & Invest: Our Services | 96 |
| Germany Trade & Invest: Our Partners | 97 |

see map Germany's Chemical and Related Process Industry Selected Investment Sites inside the cover

Welcome Address



Germany's chemical industry is number one in Europe. The industry employs more than half a million highly skilled staff. The businesses and institutes involved in this sector invest substantially in research and development. This makes the industry a driving force for innovation. By developing new materials, active ingredients and specialized applications, the chemical industry sets the benchmarks for advancing state-of-the-art technologies. This creates benefits for fields such as health, energy efficiency, renewables, energy storage, and electric mobility.

Leading international chemical firms have chosen to locate in Germany. They were drawn here because of the highly qualified workforce, state-ofthe-art logistics, and well-developed infrastructure available in the country. Germany's central geographical location at the heart of Europe is a further factor. This opens up access to a market of more than 450 million customers.

This brochure sets out the German concept for modern chemical industry parks. These globally unique, integrated production sites provide the ideal business environment for established and new companies alike. Each chemical park offers a large range of services. The parks' infrastructures are designed specifically for chemicals and they are home to innovative research institutions tailored to the needs of the chemical industry and associated processing industries.

Photo: BMWI Federal Ministry of Economics and Technology

New investors locating in the chemical parks can benefit from the parks' technical facilities, raw materials recycling, logistics, plant security, and occupation safety services as well as gain advantages from cooperation with industrial and research partners. The chemical industry in Germany offers a great many opportunities and warmly welcomes all new business partners.

Yours sincerely,

Rainer Bridel.

Rainer Brüderle MdB Federal Minister of Economics and Technology

Opportunities and Benefits for Investors

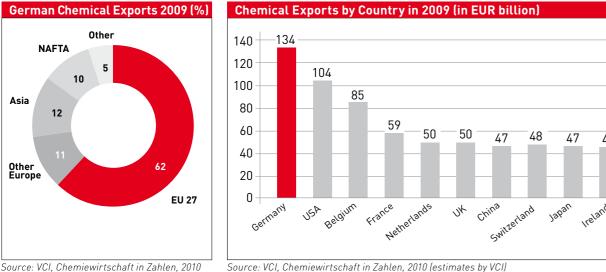
Germany – global heavyweight for process industry

As a location for the production of chemicals and associated process industries, such as glass and ceramics, paper and paperboard, and biofuels, Germany is a global heavyweight, ranking first in Europe.

In 2009 Germany was again the world's largest chemical exporter accounting for 13 percent share of the global export market. Most exports went to other European countries, while 12 percent headed to Asia and 10 percent to North America (NAFTA). With sales of EUR 145 billion in 2009, the German chemical industry played a leading role in the global arena and secures 446,000 quality jobs in Germany.

Several factors have been instrumental in this encouraging trend. One is the country's proximity to the faster-growing markets in Central and Eastern Europe, especially now that many countries there have become members of the enlarged European Union. In domestic terms, Germany also offers an attractive market and location to invest. With 80 million inhabitants, it is the EU's largest country by population and one of the world's top economies.

Number 1 in Europe: Germany's Chemical and Related Process Industry



(estimates by VCI)

| indicators of the German Process industry | | | | | | |
|---|-----------|----------|---------|-----------------------|--|--|
| | Chemicals | Plastics | Paper | Glass/Ceramics/Cement | | |
| Turnover (EUR billion) 2007 ¹ | 178 | 72 | 38 | 19 | | |
| Employees 2007 ¹ | 456.414 | 378.835 | 144.096 | 102.998 | | |
| Exports 2008 (EUR billion) | 156 | 45 | 18 | 11 | | |
| Exports 2009 (EUR billion) | 136 | 37 | 16 | 10 | | |
| Gross Investments (EUR million) 2007 ^{1,2} | 5.696 | 2.406 | 1.246 | 827 | | |
| Ranking in the EU 27 | No 1 | No 1 | No 1 | No 1 | | |

Source: EUROSTAT 09/2010

NACE-Codes: Chemicals DG. Paper DE21, Plastics DH, Glass DI261, Ceramics DI262, Cement DI265 ¹ For international comparison industry data was only available for 2007.

² Gross investment in machinery and equipment

29

Challenge and change

But maintaining such world-class performance is not easy. In the face of the many global challenges it is undergoing a process of continual restructuring and rationalization.

German companies have often been at the forefront of this change and have maintained their global prominence. The country's top producers account for no less than six of the top 40 chemical companies, headed up by such illustrious names as BASF, Bayer, Evonik Industries, Linde, Merck and Lanxess.

Global players, such as Dow Chemical, Ineos and Sabic, have a significant production base in the country and continue to invest here. Years of investment and production optimization have resulted in a network of highly integrated production sites, linked by good logistical infrastructure and enjoying first class energy supply and service provision.

By forming site management companies whose core business is the supply of utilities and who therefore have a direct interest in the maintenance and development of their assets, the chemical sites have ensured that they offer state-of-theart infrastructure for investors to tap into.

In the following pages, we analyse closely the benefits of investing alongside Germany's global chemical producers on their well honed and well-connected production complexes - not just for fellow chemical concerns, but for a wide range of associated process industries.

In an era of rapidly globalizing production, multinational and even regionally-based companies have embraced international development as a strategy to drive growth. But in these competitive times, selection of where to site new production facilities is a highly critical decision.

Payback time and long-term profitability of investments depends so much on the initial cost of the project and then the ongoing costs of utilities and site services.

Gone are the days when an investor in the chemical or process industries would choose a greenfield site and expect to build not only the production plant but all the required support infrastructure, to provide, for example, raw materials, energy and steam, and storage and logistics facilities.

Exceptions can be found in the Middle East, but in developed regions such as Europe and the US, greenfield development is largely a thing of the past.



Today, companies are looking for the cost savings and synergies that can be found by investing alongside existing producers, to share many of the facilities already in place. This trend has been enabled and even encouraged by the restructuring of the chemical industry in Europe, which has led to the opening up of single-company chemical complexes to multiple occupancy and even ownership.

Germany, with its renowned strength in chemicals production, is a prime example of what is now on offer to the international investor. Indeed, the highly developed infrastructure and services on and around chemical sites in Germany have been pivotal for the positive development of the chemical industry over the decades since the middle of the last century.



Source: Bundesbank, 2010

But it is not just the chemical producers who are seeing the benefits of making investments on these chemical sites. Other process industries are beginning to see the advantages, too, as they realize the benefits to be gathered by sharing infrastructure, site services and logistical capabilities of the sites. In fact, the industrial environment is so attractive to investors from related process industries that manufacturers of paper and board, glass, new lightweight materials, as well as materials and fuels derived from renewable resources are beginning to colocate their facilities alongside chemicals.

In this publication, we present some **39 sites** in Germany that have been selected to showcase the rich variety of specific benefits that await the potential process industry investor in Germany. The overview table on pages 16 and 17 visualizes the industry segments for which these sites offer specific benefits to investors. But what are these benefits in more detail? And why should Germany be a prime location for potential investors?

Infrastructure

Let's take Germany's well-developed logistical infrastructure first. The country's chemical complexes are served by a range of logistics modes, from road and rail to waterway and pipeline. And investment is being made all the time to improve provision across this spectrum.

Major sites are interconnected through pipelines that transport raw materials such as ethylene and propylene, both within the country and via Belgium and the Netherlands to neighbouring centres of chemical production and Europe's northwestern seaports. The pipeline network in the southern Bavarian region is under construction and there are active plans to expand it in the northwest of Germany.

For road transport, new autobahn building is scheduled across northern Germany, and in rail, carriage of bulk goods by train is seeing renewed interest and investment.

Almost uniquely, Germany is also well served by river and canal networks, with the Rhine and Elbe rivers serving as major arteries for barge traffic to the deepwater ports in the mouth of the rivers and the north and northwest coast lines.

The Kiel Canal additionally serves as a key waterway between the Baltic and North Sea shipping. But logistics infrastructure is not the only key to Germany's success as a chemicals powerhouse. Another major attraction is the availability of energy. Infrastructure for this, too, is being renewed, with a series of new coal-fired power stations planned for the north of the country. There are also investments afoot to ensure greater flows of natural gas from Russia to the Baltic coast and the German heartland.

In addition, most of Germany's chemical sites operate their own power stations which provide ready access to process steam and heat. These are, at least partly, fed with production residues.

German Chemical Locations Are Connected to the European Pipeline Grid



The diversified oil supply structure ensures a stable basis for the German chemical industry.

Germany gets its oil from the Mediterranean, the North Sea and Russia via pipelines.

Pipelines for ethylene and propylene complement the supply structure for chemical parks.

Chemical parks are connected to a network of pipelines for natural gas, naphtha, hydrogen, carbon monoxide and technical gases.

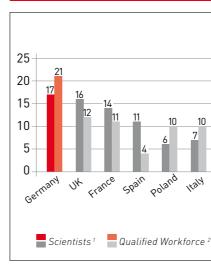


Synergies

The main benefits for the overseas investor are to be derived from the infrastructural synergies actually within the chemical industry's production complexes. Many of these today are integrated, multi-producer sites with a third-party management company looking after the efficient running of the services and utilities. It is a concept the German industry has embraced wholeheartedly in the last decade, as many of the huge complexes have been affected by industry restructuring and merger and acquisition (M&A) activity.

All told, there are some 55 chemical producing sites in Germany with no fewer than 40 organized as chemical parks.

Employee Qualification 2008 (%) (share of total number in the EU 27)



Advanced trainig and employee qualification are important success factors for companies operating in Germany.

Stable social partnership companies to a high extent.

Agreement-oriented partnership between companies and trade unions.

¹ Respective share of the total number of scientists (superior education, university degree) in the EU 27

² Respective share of the qualified workforce (secondary education, post-secundary level, technicians and comparable non-technical professions) in the EU 27

This chemical parks and sites concept, as it has become known, makes it easier for investors to come and "plug into" all the infrastructural requirement, a much more cost-effective option than a greenfield investment.

The integration offered in terms of raw materials supply, energy and steam provision, waste and water treatment and shared maintenance and logistical services, is a real boon to potential investors and one that the site marketing arms are all too ready to promote. In fact, the offerings of the "plug & play" sites can fulfil the needs of many manufacturers from the process industry and processors of downstream products, such as plastics and composites.

Germany has the highest level of employee qualification in Europe.

Employees identify with their

But it's not just the hardware that potential investors can tap into when they invest in these integrated sites. There are other benefits for investors from specific related process industries. Knowledge of managing complex processes has been developed on these sites over many decades. New investors - especially innovative start-ups - will benefit by tapping into such resources. In addition, some chemical parks are members of innovation clusters. Often these clusters are built up by industry to support and speed innovation in existing sectors, but increasingly they are being established by government to stimulate German expertise in technology platforms such as biotechnology, nanotechnology, solar technology and the hydrogen economy.

First-class facilities and well trained personnel

The result for potential investors in the German chemicals sector is attractive. They can link into these networks and clusters as soon as they invest in production or research in the country, giving access to firstclass facilities, specific scientific and industrial projects and greater contact with suppliers and customers. Also to be found is sophisticated equipment and know-how for chemical and physical analyses as well as process measurement techniques and staff that offer competent consulting for many different industries. These are a real benefit for companies wanting to develop their technology rapidly. Often infrastructure such as laboratory space and pilot plants are located on the premises and can be rented. Partnering with companies providing contract research services on-site has proven to be particularly positive.

The human factor also comes into play. Vocational and advanced training in the chemical industry is pivotal to the success of a sophisticated industry in which specialized, high technology plants are operated and maintained. A unique dual education system involving vocational schools imparts theoretical knowledge, with practical industrial training being given by the production company. For many years employers and pragmatic industrial unions in the German chemical industry have cooperated successfully for their mutual benefit. Flexible payment schemes enable newly settled companies to be commercially successful.

Benefits for other process industry investors

Besides chemicals, a number of other industry sectors are beginning to take advantage of the synergies available in these production complexes. One leading example is **industrial biotechnology**. In this case, a number of factors come into play.

Many of the chemical sites in Germany, especially in the eastern states, are in close proximity to agriculturally productive regions, giving investors access to efficient raw material sources, such as grain and straw- and wood-based lignocelluloses. Also, many of the sites are located in or close to deepwater ports, which provide direct access to crops imported from global markets.



Biotech investors can also tap into established infrastructure and services on offer, as well as the knowledge and experience of companies already on the site. This can for example facilitate the speedy scaleup of biotech processes. Colocation also brings proximity to companies with established positions in downstream markets, ranging from fuels to polymers and functional materials. And then there is the additional benefit of direct access to established effluent treatment facilities as well as extensive know-how in effluent management.

The emerging sector of **lightweight materials** – or fiber-reinforced composites – is another that has been identified as a potential winner from the synergies from co-siting. Energy infrastructure is important for producers of carbon, glass and ceramic fibers. And, in addition, producers of such products benefit from the support they receive to meet environmental performance standards. The integrated chemical sites also offer infrastructure for producers of the resins and functional coatings that are needed to produce these structural composites.

On-site energy infrastructure is also a boon for potential investors in the paper and board sector. This integration allows the energy content of co-products from the paper mill to be used economically by feeding them to the on-site power plant. As in the case of industrial biotechnology, good logistics and proximity to agriculturally productive regions brings access to efficient raw material sources, including waste paper as well as timber resources. And access to deepwater ports and water and waste treatment facilities is a key plus point.

Finally, even the **glass industry** can expect to benefit from association with the chemical complexes. While sites for production of standard grades of glass have to be located close to suitable quartz deposits, specialty glass, such as that required for optical and communication applications, can benefit from colocation on a chemical park which has established infrastructure and permits for producing chlorine. Integration into the site energy infrastructure is also a benefit.

Closeness of the profiled sites to innovation clusters is also a plus for innovation driven investment projects. Details of these are outlined in the individual site profiles.

Investors benefit from efficient authorization

The time taken to gain approvals for chemical plant construction significantly impacts the time required to implement an investment. This in turn has a marked effect on the profitability of the project.

It is not surprising, therefore, that the efficiency with which approvals can be obtained in a particular region is often the deciding factor affecting the choice of production location.

Both the complexity and scope of the permit, as well as the efficiency of the organizations involved in granting approvals, differ widely in the global competitive arena. Consequently any global site search must include such a comparative analysis.

Environmental laws in Germany have mostly (around 80 percent) resulted from the implementation of European Union legislation. More specifically, the German Federal Emission Control Act was formulated to implement the European IPPC and Seveso II directives.

Currently, around 60,000 industrial plant facilities in Germany have been formally granted authorization according to both European and German laws.

In recent years the process for gaining authorizations in Germany has been radically streamlined and simplified for the investor. Today all facility-related approvals and permits (covering industrial safety, construction, emission control, fire protection and occupational safety, etc.) are covered by one application. This is submitted to one permit-issuing authority and is dealt with by one competent contact person, who coordinates these documents within the various authorities.

In fact, legislation has now been introduced to limit the time that the authorities are permitted to take for an approval. A permitting authority is bound by law to grant approval within a maximum of seven months after the completed documents have been submitted, assuming all requirements are fulfilled.



These improvements have led to a significant reduction in the average authorization time for processing applications in Germany. For example, in North Rhine-Westphalia (NRW), the state with the highest density of such plants, the average period for an authorization with public participation is around six months. Included in this average are some large and controversial investment projects, such as lignite-fired and gas-steam power plants, as well as waste incineration plants in chemical parks.

This is clearly a boon for investors, providing them with early planning security for their projects, in spite of complicated procedures involving public participation and requiring an assessment of environmental effects.

Plug & play concept

The concept of "plug & play" is today widely appreciated. Sites commonly offer a comprehensive range of services which are customized to the needs of prospective foreign or national investors. The major benefits to both the site operator/owner and the investor are that site overheads are shared and thus become more cost-effective. The following services are typically available.

Chemical infrastructure

Many chemical parks and sites in Germany are connected to an international pipeline network for raw materials and intermediates, offering almost unlimited possibilities for linked chemical production. Unique value chains are made possible by the wide choice and good availability of chemicals – with a minimal amount of logistics.

Services

Wastewater treatment, thermal treatment of production residues, emergency services, industrial safety, healthcare and fire protection, environmental services, analysis and testing services, rail dispatching, product storage – all are widely found on large chemical complexes.

Advice and permitting

Investors are supported by such services as investment planning, application for investment subsidies and construction. The most soughtafter service is that for obtaining permits. Licensing procedures are completed quickly and hassle free with competent public authorities assisting in the process from a very early stage.

Utilities

Utilities that are typically required for the operation of a chemical plant are available to prospective investors, e.g. electrical power (different voltages), steam (different pressure stages), natural gas, industrial gases, water (different qualities), cooling water, compressed air, nitrogen, and so on.

Often these are provided by a single site provider or by independent service providers located on or near the site. **Business models**

The many chemical sites and parks in Germany offer a wide range of flexible business models and incentives to attract investors to their location. There is a huge variety of business models that potential investors can explore. If they choose, the investors can merely buy or lease land from the site owner and establish their own production unit. At the other extreme, the business model might consist of a site operator investing in and operating a new plant for the investor, on a custom or toll manufacturing basis.

In some cases, the contract will specify use of the site services as a prerequisite for the investment; in others the investor may be allowed to buy in services on a competitive basis. In a third model, the site operator may offer to tender for services on a competitive basis with a short list of suppliers, on behalf of the investor.

The ultimate goal, of course, is to create added value at the site, for all parties concerned. We call it synergy.

Investors choose the services that suit their business model from a wide range offered by the site operators.



Source: VCI Fachvereinigung Chemieparks / Chemiestandorte, 2009

Energy security makes Germany attractive

Security of energy supply is a crucial factor in the energy-intensive process industries. It comes to the fore when choosing an investment location and in determining the market prospects of any planned facility. On this score, Germany has a lot to offer.

The security of Germany's electricity supply is very high by international standards. Unlike the US and some other countries in Europe where major blackouts are recurrent, power outages are definitely the exception in Germany. Blackouts thus present insignificant risk for the process industry in the country.

The average amount of time lost to blackouts in the US is nearly four hours per year and in Spain two hours per year. Italy and the UK suffer from outages of around 80 minutes per year. All exceed the average in Germany, at just 40 minutes per year.

Diversity of supply

Germany has to rely on imports for about two-thirds of its energy supply. The picture is similar in many industrial countries. However, in contrast to its counterparts, Germany's primary energy mix measured in terms of fuel type and source - is very broadly diversified Lignite and hard coal account for just under 50 percent of energy, followed by nuclear and natural gas with a 22 percent and 12 percent share respectively. Nearly 20 percent is provided by wind, solar, biomass and other sources. Indeed, Germany is the world's leading producer of wind power with a 24 percent share of global installed capacity.

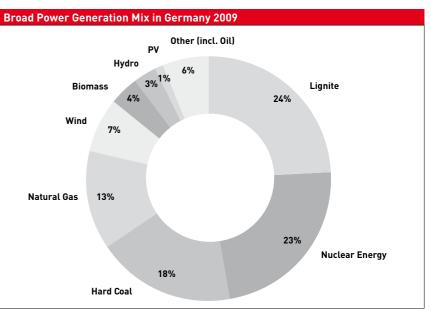
In the winters of 2007 and 2008 it became patently obvious that uncertainty of natural gas deliveries from Russia via the traditional supply channels brought significant risks for countries in central and eastern Europe. Plans for a direct gas pipeline from Russia to Germany via the Baltic Sea will minimize exposure to future delivery risks.

This will be a great advantage. The Baltic pipeline will turn Germany into the international hub for Russian gas in Europe. Moreover, Germany will become Europe's preeminent trading market for natural gas.

Already trade on the European Energy Exchange (EEX) in Leipzig is growing in importance internationally. The product range comprises natural gas, electric power, coal and carbon dioxide emission rights. The market relevance of the EEX goes far beyond the actual volumes traded. Indeed, the EEX quotations serve as price signals for many market participants and for transactions completed outside the trading platform.

Innovation

Internationally, Germany is considered to be a testing ground for energy efficiency and new energy concepts.



Source: BDEW Bundesverband der Energie- und Wasserwirtschaft e.V.

Germany's engineering industry identified energy efficiency as a global mega-trend a long time ago. All customer groups are able to benefit from the innovative capacities of German engineering.

Efficiency is a key selling point in international plant construction and is playing an increasingly important role in consumer electronics. Modern laser technology, robotics and automation engineering from Germany help car makers to capitalize on technological advances and productivity gains, and thus boost their competitiveness in global markets. Germany's engineers are also paving the way to a solar future. It is their expertise that is making the industrial production of new energies such as wind power and photovoltaics possible in the first place thus increasing their competitiveness versus conventional technologies.

Forward thinking companies from the process industry that take particular interest in the issues and solutions thrown up by the challenges of securing an efficient and modern energy supply would be well advised to invest in Germany. This would position them at the cutting edge of efforts to find future-oriented solutions – besides, of course, allowing them to reap part of the rewards.



Chemical parks benefit from secure power

A secure power supply is a pivotal factor for profitable operation of industrial plants. For energy-intensive process industries, the advantages offered by Germany's well-established chemical parks are clear, as they benefit from strategically designed infrastructure that guarantees a seamless power supply at affordable costs.

To guard against disruption in power supply, or even of a voltage dip from a single supply source, chemical parks are made secure through the provision of a number (two to three) of redundant supply lines.

Most chemical parks have gone one step further in their efforts to secure power supplies by constructing and operating their own power plants on the site.

In addition to electricity, an undisrupted supply of steam and the overall energy cost are also key success factors. By generating both heat and power from various sources of primary energy, chemical parks are in a favored position to utilize fully the inherently high efficiencies found with combined cycle heat and power (CHP) generation.

Plants within any one chemical park are linked to duplicate transmission networks, which ensure a stable supply in the case of disruption of one line. This can be caused, for example, by lightning strike. This supply by two independent systems guarantees continuity even in the event of acts of nature.

This almost perfect structure for quality power supply makes the German chemical parks an ideal location for investors in the process industries.

Incentives for investment projects

Funds are provided by the German government, the individual federal states, and the European Union (EU). These are predominantly aimed at new investments geared towards fostering economic growth. Germany has EUR 26.3 billion funding provided by the EU (co-financed using means obtained from German national and regional budgets) at its disposal until 2013. In addition, Germany and its individual states make their own incentives funds available.

There are a number of incentive programs available which can be grouped into two overall packages:

- investment incentives package with different measures to reimburse initial investment costs.
- operational incentives package to subsidize expenditures after the investment has been settled.

Investors planning to build production plants or service centers in Germany are eligible for direct cash grants that need not be repaid.



In Eastern Germany in particular, the government provides grants of between 30 and 50 percent of eligible investment costs (such as equipment, machinery, and building costs) subject to company size and investment volume. Grants of between 15 and 35 percent of eligible expenditures are awarded in selected regions in Germany's western states as well as in Berlin.

National and regional development banks also provide loans to make it easier for foreign investors to pursue business activities in Germany. These loans ordinarily require no principal repayment in the initial phase ("grace period") and offer below market level interest rates. Investors can apply for these as a supplement or an alternative to loans from their main bank. Young foreign companies often have difficulty providing sufficient security for loans; under certain circumstances, they can benefit from public guarantees from the federal states or the federal government.

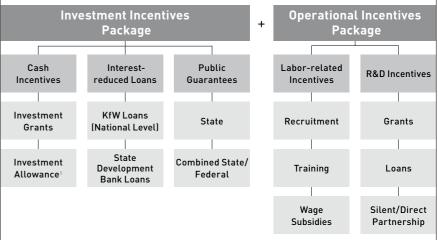
Local authorities also provide incentives for recruiting, hiring, and training staff – irrespective of company size, industry or location. Special emphasis is placed on hiring and training unemployed candidates.

Foreign investors actively involved in Germany's high-tech industries can apply for research and development grants as an additional means of lowering operating costs. These direct project grants are awarded within the scope of the federal government's "High-Tech Strategy" designed to promote future technologies. Investors can also take out public research and development loans or use a silent partnership. Subsidies are also available at the EU level.

Competitive tax system

Germany offers a competitive tax system providing attractive tax rates for corporate companies. In recent years, the German government has implemented root and branch reforms of the tax system to make the country a more attractive business location.

The German tax system allows for differing tax rates throughout Germany. This is due to a corporate tax system consisting of three different components; with two fixed and one flexible component. The fixed components are the flat 15 percent corporate income tax and the 0.825 percent solidarity surcharge. The flexible component is the trade tax (being a municipal tax). Each municipality in Germany sets an individual trade tax rate resulting in different trade tax levels across the country. The trade tax rate currently varies between 7 percent and 17 percent. Trade tax rates tend to be higher in urban areas than they are in rural areas.



¹⁾ only in Eastern Germany

On average, the overall tax burden for corporate companies amounts to 29.83 percent. With municipalities offering the minimum trade tax rate and a resulting overall tax burden of only 22.83 percent, Germany can even compete with low tax countries in Europe and offers one of the most competitive corporate tax systems among the major industrialized countries.

Additionally, Germany has implemented reforms stipulating relief concerning the calculation of the tax base (such as a better deductibility of interest rates). To avoid double taxation in international business relations, Germany has set up an extensive network of double taxation agreements with numerous countries.



Overview of industry segments targeted by selected sites

| over view of industry segments | | | | | Inorganic Basic Chemicals Petrochemicals and Derivates Polymers Fine and Speciality Chemicals Pharmaceuticals Detergents and Body Care Products | Glass/Ceramics Paper Metals New Materials Plastics Processing Renewable Energies Fertilizers | |
|--|--------------------------------|--|----------|-------------|---|--|----------|
| Site Name | Location | Site Operator | | Fenced/Open | Industry Segments | Industry Segments | Page |
| 1 Bayer Industrial Park Brunsbüttel | Brunsbüttel | Bayer MaterialScience AG | 1 | Fenced | | | 18 |
| 2 ChemCoast Park Brunsbüttel | Brunsbüttel | - | 2 | Open | | | 20 |
| 3 CoastSite Wilhelmshaven | Wilhelmshaven | - | 3 | Open | | | 22 |
| 4 Dow ValuePark® Stade | Stade | Dow Deutschland Anlagengesellschaft mbH | 4 | Fenced | | | 24 |
| 5 IndustriePark Lingen | Lingen | - | 5 | Open | | | 26 |
| 6 Industriepark Walsrode | Walsrode-Bomlitz | Dow Wolff Cellulosics GmbH | 6 | Fenced | | | 28 |
| 7 Honeywell Specialty Chemicals Seelze GmbH | Seelze | Honeywell Specialty Chemicals Seelze GmbH | 7 | Fenced | | | 30 |
| 8 Baltic Industrial Park Schwerin | Schwerin | - | 8 | Open | | | 32 |
| 9 Industrial Park Schwedt | Schwedt | IP Industriepark Schwedt GmbH & Co. KG | 9 | Fenced | | | 34 |
| 10 Chemical Site Schwarzheide | Schwarzheide | BASF Schwarzheide GmbH | 10 | Fenced | | | 36 |
| 11 Industrie- und Gewerbepark Altmark | Arneburg | Altmark Immobilien Management GmbH | 11 | Open | | | 38 |
| 12 Agro-Chemie Park Piesteritz | Wittenberg-Piesteritz | SKW Stickstoffwerke Piesteritz GmbH | 12 | Fenced | | | 40 |
| 13 ChemiePark Bitterfeld Wolfen | Bitterfeld Wolfen | P-D ChemiePark Bitterfeld Wolfen GmbH | 13 | Fenced/Open | | | 42 |
| 14 Dow ValuePark® | Schkopau | Dow Olefinverbund GmbH | 14 | Fenced | | | 44 |
| 15 Chemical Site Leuna | Leuna | InfraLeuna GmbH | 15 | Fenced | | | 46 |
| 16 Industriepark Schwarze Pumpe | Spremberg / Spreetal | VSG GmbH | 16 | Fenced | | | 48 |
| 17 Marl Chemical Park | Marl | Infracor GmbH | 17 | Fenced | | | 50 |
| 18 Dorsten-Marl Industrial Park | Dorsten/Marl | - | 18 | Open | | | 52 |
| 19 Chemical Park RÜTGERS | Castrop-Rauxel | RÜTGERS Germany GmbH | 19 | Fenced/Open | | | 54 |
| 20 Gelsenkirchen Site | Gelsenkirchen | BP | 20 | Fenced | | | 56 |
| 21 Deutsche Gasrußwerke | Dortmund | KG Deutsche Gaßrußwerke | 20 | Fenced | | | 58 |
| 22 Chemiepark Bayer Schering Pharma | Bergkamen | Infrastructure BSP BGK | 22 | Fenced | | | 60 |
| 23 CHEMPARK Krefeld-Uerdingen | Krefeld-Uerdingen | CURRENTA | 23 | Fenced | | | 62 |
| 24 Bayer Schering Pharma AG,Supply Center | Wuppertal Elberfeld | Bayer Schering Pharma AG | 23 | Fenced | | | 64 |
| 25 Industriepark Oberbruch | Heinsberg | NUON Energie und Service GmbH | 24 | Fenced/Open | | | 66 |
| · · · · · · · · · · · · · · · · · · · | - | CURRENTA | 26 | Fenced | | | 68 |
| 26 CHEMPARK Dormagen 27 CHEMPARK Leverkusen | Dormagen | CURRENTA | 20 | Fenced | | | 70 |
| 27 Chemical Industrial Park Knapsack | Leverkusen Knapsack/Hürth | InfraServ GmbH & Co. Knapsack KG | | Fenced | | | |
| 28 Chemical industrial Park Knapsack 29 Industriepark Niederau | Düren | Akzo Nobel Chemicals GmbH | 28 29 | Fenced | | | 72 74 |
| | | | | Fenced | | | |
| 30 Evonik Degussa GmbH Plant Lülsdorf 31 AllessaChemie GmbH Fechenheim | Lülsdorf Fechenheim | Evonik Degussa GmbH | 30 31 | Fenced | | | 76 |
| 31 Allessachemie Gmbh Fechenneim 32 Industriepark Höchst | Fechenneim Frankfurt/Höchst | AllessaChemie GmbH Infraserv GmbH & Co. Höchst KG | | Fenced | | | 78 |
| • | | | 32 | | | | 80 |
| 33 Wolfgang Industrial Park | Hanau Wieshadan | IPW GmbH | 33 | Fenced | | | 82 |
| 34 Industriepark Kalle-Albert | Wiesbaden | Infraserv GmbH & Co. Wiesbaden KG | 34 | Fenced | | | 84 |
| 35 BASF Ludwigshafen | Ludwigshafen | BASE SE | 35 | Fenced | | | 86 |
| 36 Industrie Center Obernburg | Obernburg | Mainsite GmbH & Co. KG | 36 | Fenced | | | 88 |
| 37 Werk Gendorf Industrial Park | Gendorf/Burgkirchen | InfraServ Gendorf | 37 | Fenced | | | 90 |
| 38 Industriepark Gersthofen | Gersthofen | Industriepark Gersthofen Servicegesellschaft mbH | 38 | Fenced | | | 92 |
| 39 INFRARHOD | Freiburg | Rhodia Acetow GmbH | 39 | Fenced | | | 94 |

Source: Germany Trade & Invest, 2011

Bayer Industrial Park Brunsbüttel





30 km



Site Classification

Site Owner Bayer AG

Site Operator **Bayer MaterialScience AG**

Full Service (Plug & Play) Yes

Fenced/Open Site Fenced

R&D Support No

Key Data

Total Site Area 420 hectares (1,038 acres)

Total Free Area 250 hectares (618 acres)

Number of Permanent Staff 1,200

Number of Companies On-Site 25

www.brunsbuettel.bayer.de

Target Investors

Companies searching for site with superb logistical and power infrastructure for production of chemicals as well as other process industries

Partners of Site/Member of

- ChemCoast e.V., network of chemical sites
- ChemCoast Park Brunsbüttel, regional network of chemical sites
- VCI (Chemical Producers) Association)

Potential Business Partners

- Bayer Gastronomie GmbH (catering service)
- Bayer MaterialScience AG (TDI, MDI, polyurethane preliminary products)
- CFB Chemische Fabrik Brunsbüttel GmbH (reactive dyes)
- Friedrich A. Kruse jun., Internationale Spedition e. K. (high bay storage area, logistics)
- IndustriePark Logistik Brunsbüttel GmbH (logistics)
- Linde Gas AG (carbon monoxide and hydrogen)
- Lanxess Deutschland GmbH (rubber chemicals and preliminary products for crop protection)
- TÜV SÜD Chemie Service GmbH (technical inspection)
- Vesta Biofuels Brunsbüttel GmbH & Co. KG (biodiesel fuel from renewable plant-based raw material)
- VSU Vereinigte Sicherheitsunternehmen GmbH (safety and security services)
- Furthermore 16 contracting companies for maintenance and engineering services

Also a number of other chemical companies, energy producers and logistic services can be found on the ChemCoast Park Brunsbüttel.

Engineering services; Analytic services; Fire department; Security systems;

R&D



Key Benefits for Investors

Infrastructure

- Direct access to the river Elbe, the North Sea and Baltic Sea
- (via the Kiel Canal) with 3 intermodal ports;
- Railroad connection;
- Access to high voltage power grid, infrastructural facilities

Raw Materials On-Site

Hydrogen, clorine, access to crude oil and ethylene via pipelines; Possible synergies with value chain of producers on-site (see below)

Services/Utilities

- Full "Plug & Play" service package: mechanical and
- process control engineering facilities;
- Complete energy supply, (e.g. electrical power, natural gas,
- nitrogen, hydrogen, steam, compressed air, process
- and drinking water);
- Efficient waste water management;
- Health-, safety-, environment- and quality-services;
- Authorization office and others

R&D institutes in 50 km radius:

- Universities in Hamburg, Kiel, Lübeck and Flensburg
- Universities of Applied Sciences in Heide and Elmshorn
- Fraunhofer Institute for Silicon Technology "ISIT" in Itzehoe

ChemCoast Park Brunsbüttel





30 km



Site Classification

Site Owner **Various**

Site Operator
No Central Operating Company

Full Service (Plug & Play) **Yes**

Fenced/Open Site **Open**

R&D Support **No**

Key Data

Total Site Area **1,800 hectares** (4,448 acres)

Total Free Area **501 hectares** (1,236 acres)

Number of Permanent Staff 4,300

Number of Companies On-Site **20**

www.chemcoastpark.de

Target Investors

- Companies seeking to benefit from deep water harbour and location linking ocean-going vessels and those suitable for shipping on the Baltic Sea
- Raw materials (oil) and derivates users
- Tank farm operators
- Companies with high power consumption
- Companies that integrate into the local knowledge pool and value chain

Partners of Site

 Member of ChemCoast – north German chemical sites network

Potential Business Partners

- Bayer Material Science: TDI, MDI, polyurethane preproducts
- Sasol: Fatty alcohols and derivatives, inorganic speciality chemicals, (particularly high purity alumina)
- Shell: Oil derivates, petrochemical products
- Yara: Ammonia, urea

A number of other chemical companies, energy producers, and logistic services can be found at the ChemCoast Park Brunsbüttel.



Key Benefits for Investors

Infrastructure

- Direct access to the River Elbe, the North Sea and Baltic Sea
- (via the Kiel Canal) with 3 intermodal ports;
- Oil pipelines to refinery Hemmingstedt and oilfield Mittelplate;
- Ethylene pipeline to Stade and Hemmingstedt;
- Railroad connection;
- Access to high voltage power grid

Raw Materials On-Site

Access to crude oil and ethylene via pipelines; Possible synergies with value chain of producers on-site (see below)

Services/Utilities

R&D

- Logistics companies on-site; Power supply via nuclear plant; Cooling water from the Elbe; Waste management
- R&D institutes located in 50 km radius: Fraunhofer Institute for Silicon Technology ISIT in Itzehoe University of Applied Sciences, Westküste in Heide Universities in Hamburg, Kiel, Flensburg

CoastSite Wilhelmshaven







Site Classification

Site Owner Several

Site Operator **No Central Operating Company**

Full Service (Plug & Play) No

Fenced/Open Site Open

R&D Support Yes

Key Data

9

Total Site Area approx. 3,000 hectares

Total Free Area approx. 1,000 hectares (2,471 acres)

Number of Permanent Staff approx. 1,500

Number of Companies On-Site

www.coastsite.info/en www.wilhelmshaven.de

Target Investors

- Energy-intensive process industry
- Companies integrating into or expanding the local value chains because they can benefit from raw material availability in the up and down streams of the existing companies.
- Companies who want to expand into world wide value chains by using and benefiting from the infrastructure and the logistics made available by the container port (especially targeting fast growing markets like the new EU member states on the Baltic Sea or distributing products within the rest of Europe).

Partners of Site

- WFG Wirtschaftsförderung in Wilhelmshaven GmbH
- (Local Economic Development) JadeBay GmbH Entwicklungs-
- gesellschaft (Regional Economic Development)
- JadeWeserPort Logistics Zone GmbH & Co. KG (developing and marketing the logistics zone)
- Industry partners of the CoastSite Initiative
- ChemCoast regional network of chemical sites
- NBank (financial aid and incentives)

Potential Business Partners

- INEOS ChlorVinyls (chlorine and polymer producer)
- WRG Wilhelmshavener Raffineriegesellschaft mbH (refinery)
- NWO Nord-West Oelleitung (storage and transhipment of crude oil)
- E.On and GDF Suez (coal fired power plants)
- Rhenus Midgard (logistics and transhipment)
- JadeWeserPort/Eurogate (deepwater container port; in operation 08/2012)
- IVG Caverns (gas and oil storage facilities. brine)
- Air Products
- (industrial gas producer)

- Infrastructure
- completed.

Raw Materials On-Site

PVC, VCM, EDC, ethylene, chlorine, caustic soda, hydrogen, rock salt, different kinds of petroleum products, gas, coal, brine, crude oil, nitrogen, oxygen, rare gases

Services/Utilities from the Jade Bay

R&D

personnel inclusive.

- Jade Hochschule, University of Applied Sciences Wilhelmshaven (e.g. engineering and management, Institute of Hearing Technology and Audiology, maritime studies and maritime technology); Carl von Ossietzky University Oldenburg (e.g. natural sciences,
- computer science);

- Biosphere AG Jade InnovationCentre;
- Institute for Chemistry and Biology of the Marine Environment (ICBM)

30 km



Key Benefits for Investors

Prime Logistics Hub and the coming Pan European Gateway. Deep water port including container-terminal JadeWeserPort* (in operation 08/2012); Short approach of 23 sea miles and a fairway with an already existing depth of 18 m below sea chart zero; External Harbour (industrial sites and jetties for import and export of chemicals, mineral oil and oil based derivative, and bulk products) and Inner Harbour (for multi purpose usage); Direct highway access and railway connection to the port and the industrial sites; Germany's largest crude oil transfer site; Regional airport "JadeWeserAirport" and International Airport Bremen; Experienced staff for handling hazardous and non-hazardous materials, operation and maintenance of complex process units/sites

* Most of the JadeWeserPort Logistics Zone is being developed as a Freight Village with trimodal transport connections and will be unique when it's

Heat and power (CHP options) via coal fired power plants; Cooling water

- Wilhelmshaven and the region offer a wide range of universities and institutes with a focus on maritime studies and technology, high qualified
- Hochschule Emden/Leer, University of Applied Sciences (e.g. technology, Institute of Nautical Science);
- DEWI German Institute for Wind Energy;

Dow ValuePark[®] Stade





30 km

Site Classification

Site Owner Dow Deutschland Anlagengesellschaft mbH

Site Operator Dow Deutschland Anlagengesellschaft mbH

Full Service (Plug & Play) Yes

Fenced/Open Site Fenced

R&D Support No

Key Data

Total Site Area 550 hectares (1,359 acres)

Total Free Area 100 hectares (247 acres)

Number of Permanent Staff 1,500

Number of Companies On-Site

www.dow.com/facilities/ europe/stade



Target Investors

Companies integrating into or expanding the local value chain:

- Users of raw materials like Ethylene, Propylene, Phenol, Aceton, Methanol
- Consumers of finished products (see below), utilities and by-products like hydrogen, HCl, steam
- Producers requiring sophisticated waste treatment or recycling facilities
- Utilization of Dow Epoxy and Polyurethane Products and Systems
- Activites in CFRP (Carbon Fiber) Reinforced Plastics)
- High value use of Hydrogen

Partners of Site

- Member of ChemCoast North German chemical sites network
- CFK-Valley cluster and competence center for CFRP
- Regional growth initiatives like "stade-project 2021"
- Universities like TUHH in Hamburg

Potential Business Partners

- Air Liquide: CO plant, technical gases
- Air Products:
- Hydrogen finishing plant Contracting companies for maintenance and engineering services
- Dow-Partner-JV:
- Power plant (in planning)
- Evides: Treated water plant
- Styron: Polycarbonate plant
- Talke: Central warehouse,
- logistics

Infrastructure

Raw Materials On-Site

Services/Utilities

in chlorinated waste; container and drums;

R&D

Multidisciplinary teams of researchers in the field of process research and analytical science; Facilities on-site (labs, mini- and pilot-plants)

Following companies in Stade are potential partners or key industrial players in close distance:

- Airbus Deutschland GmbH (Aircraft)

- - E.ON (power supply) and future power companies
 - Manufacturer of pipe systems and vessels (metal/fiber reinfor.plastics)

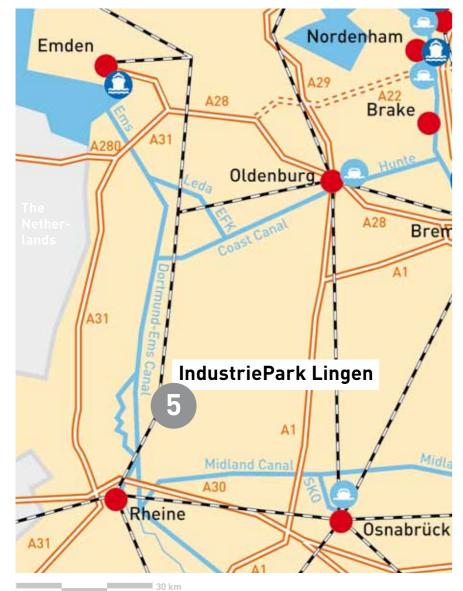
- Direct access to deep water harbor on river Elbe, close to Kiel Canal connecting North and Baltic Sea;
- All modes of transportation: rail connection with loading facilities on-site, proximity to freeway, link to ethylene pipeline grid;
- Salt caverns for gas storage;
- Power generation on-site with connection to public HV power grid; Partnership with Dow as world scale chemical company
- Acetone, allylchloride, bisphenol A, caustic, chlorine, chloroform, epichlorohydrin, epoxy resins, ethylene, glycerine (synth.), hydrochloric acid, hydrogen, methanol, methylcellulosis, methylchloride, methylenechloride, paraformaldehyde, phenol, polycarbonate, polyethylene (powder), propylene, propylene oxide, propylene glycol, proplyleneglycol-methylether, sodium chloride
- Operation and maintenance of production facilities;
- Incinerators for solids (rotary kiln), liquids and gases, highly specialized
- Waste Water Treatment facilites;
- Logistics operations: loading/unloading for ship, rail and road; in bulk,
- Expertise for mining, gas storage in caverns, pipelines;
- Engineering and analytic services;
- EH&S and permitting services

- Aluminium Oxid Stade GmbH (Aluminum oxide from bauxite)
- PROKON Nord (wind energy systems, bio-ethanol)
- Stähler (agrochemicals)

IndustriePark Lingen







Site Classification

Site Owner City of Lingen (Ems)

Site Operator No Central Operating Company

Full Service (Plug & Play)

No Fenced/Open Site

Open R&D Support

No

Key Data

Total Site Area 550 hectares (1,359 acres)

Total Free Area 114 hectares (282 acres)

Number of Permanent Staff approx. 3,000

Number of Companies On-Site 25

www.industriepark-lingen.de

Target Investors

Energy intensive process industry: e.g. paper, polymerization especially fibers

Large volume metal-working industry and machine construction

Partners of Site

- Marketing and consulting team (IndustriePark Lingen)
- Business development department city of Lingen (Ems) and Lower-Saxony

Potential Business Partners

- Baerlocher (plasticizer production)
- Belutec
- (industrial gate production) Benteler (steel production)
- Dralon (acrylic fiber production)
- Dynapac (road construction machinery)
- Rosen: Production of pipeline cleansing & inspection system RWE (nuclear and natural gas)
- powerplants on-site)

Infrastructure

Raw Materials On-Site

Services/Utilities

services

R&D None



Key Benefits for Investors

- Access to direct power and heat connection to 2 established power stations (one nuclear power), one power station under construction (natural gas) and a 4th power station in planning;
- Large single vacant plot size (33 hectares, 82 acres);
- Direct access to canal, rail and freeway;
- Low level of building/ industrial restriction

Acrylonitrile (supply by rail), plasticizers for PVC, production of steel profiles from scrap metal, five natural gas pipelines on-site

High load energy supply (electric and thermal); Companies on-site are free to agree individual service contracts with a large number of service companies located in the vicinity e.g. fire brigade and security

IndustriePark Walsrode





lunt Industriepark Walsrode

Site Classification

Site Owner **Dow Wolff Cellulosics GmbH**

Site Operator Dow Wolff Cellulosics GmbH

Full Service (Plug & Play) Yes

Fenced/Open Site Fenced

R&D Support Yes

Key Data

Total Site Area 130 hectares (321 acres)

Total Free Area 30 hectares (74 acres)

Number of Permanent Staff 2,600

Number of Companies On-Site 21

www.industriepark-walsrode.de

Target Investors

- Small to medium-sized enterprises for cellulose chemistry, functional food, renewables, packaging and films processing
- Companies demanding great flexibility, cost-transparency and competitiveness for all services provided. Companies requiring low cost structures

Partners of Site

- ChemCoast chemical sites cluster
- VCI
- Wirtschaftsdelta Vogelpark (regional business development)
- CompetenceCenter, Polysaccaride, R&D
- European Polysaccharide Network of Excellence

Potential Business Partners

- Case Tech: Manufacturer of high-quality artifical casings for efficient sausage production. In addition CaseTech provides technological support relating to sausagemaking in the butcher's trade and meat processing industry
- Dow Wolff Cellulosics (The Dow Chemical Company): Development partner and application expert in the cellulosics industry in markets such as food, personal care, pharmaceuticals, construction, paints and myriad other areas
- Epurex Films

(Bayer Material Science): Development, production and sale of high-quality polyurethane films, breathable membrane films and versatile hot-melt adhesive films

■ Wipak Group: Supplies customers in the food industry, the medical sector and in the field of technical applications with highest-quality films

Infrastructure In-park railsystem is connected to the national rail network Close to three airports and seaports Direct highway access

Raw Materials On-Site

Largest Nitorcellulose storage in Europe, cellulose fleece, sulfuric – nitric acid, formic acid, acetic acid, caustic soda, ethylene oxide, propylene oxide, methyl cloride, ethanol, isopropanol, glycerine, polymeric resins e.g. polyamide, polypropylene (PP), polyethylene (PE), polyester (PET), EVOH, Ionomer, polymer additives, printing inks, 2-component adhesives

Services/Utilities

R&D

Free lab space



Key Benefits for Investors

Utilities required for chemical production

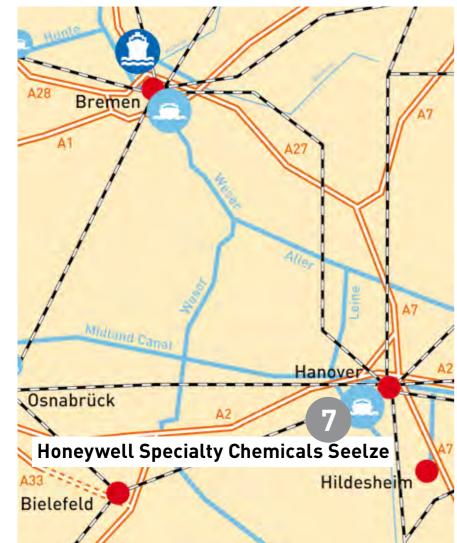
- ("plug & play" chemical park concept);
- Own power station for power and steam on-site;
- Largest training center for apprentices in northern Germany (250 p.a.);
- Waste water treatment, Engineering, Process Automation,
- Maintenance, Environment-, Health- and Safety-Services, IT

R&D center for polysaccharides (analytics, polymer characterization) and infrastructure for sugar oligomers;

Laboratory facilites to evaluate film properties and film structures;

Honeywell Specialty Chemicals Seelze GmbH





Honeywell

Site Classification

Site Owner Honeywell Specialty Chemicals Seelze GmbH

Site Operator Honeywell Specialty Chemicals Seelze GmbH

Full Service (Plug & Play) **Yes**

Fenced/Open Site Fenced

R&D Support **Yes**

Key Data

Total Site Area 500 hectares (1,236 acres)

Total Free Area **8 hectares** (20 acres)

Number of Permanent Staff **850**

Number of Companies On-Site 3

www.honeywellseelze.com



Target Investors

- Companies that can integrate into local value chain (see below) e.g. specific users of raw materials, intermediates, end products
- Raw material suppliers, producers of complimentary products (additives, packaging as well as service providers – logistics, warehousing, silo operation)
- User of utilities available on-site and provider of utilities for location
- Customers for downstream value chain
- Companies that integrate into the knowledge pool of polymer and automotive innovation clusters

Partners of Site

 ChemCoast regional chemical site cluster initiative

Potential Business Partners

- Honeywell: High-purity inorganic and organic chemicals, high-purity electronic chemicals, luminescent materials
- Sigma-Aldrich Laborchemikalien GmbH: Wide range of products used in analyses and R & D
- Troy Chemie GmbH (analytical and micro-biological labs)

Center of Excellence (Honeywell) providing extensive services such as sophisticated chemical analysis and wide range of laboratory chemicals on-site.

_____ 30 km

Key Benefits for Investors

Infrastructure

- Direct access to rail connection with bi-modal (rail/road) loading facilities on-site, proximity to freeway;
- Own docking facilities on the Mittellandkanal access from Rhein river to Polish border;
- Energy supply (electricity & steam);
- Water supplies, compressed air, nitrogen and cooling systems,
- waste air incineration, waster water treatment and waste disposal,
- storage facilities and transportation

Raw Materials On-Site

Direct access to semiconductor grade hydrogen fluoride raw material

Services/Utilities

R&D

- Full service "Plug&Play" site;
- Incinerator for waste air;
- Waste water treatment;
- Services: Health, safety and environmental protection,
- IT/communication, engineering & automation, workshops,
- personnel, financial services and procurement;
- Full service for chemical packaging, personnel training center

Baltic Industrial Park Schwerin







Site Classification

Site Owner The City of Schwerin and the State Mecklenburg-Vorpommern

Site Operator

Department for Economic **Development and Tourism**

Full Service (Plug & Play) Yes

Fenced/Open Site Open

R&D Support

Yes

Key Data

Total Site Area 350 hectares (865 acres)

Total Free Area 330 hectares (815 acres)

Number of Permanent Staff approx. 300

Number of Companies On-Site 2

www.schwerin.de

Target Investors

- Companies looking for a large low cost facility for the production along the entire value chain from raw materials or components to final products.
- Large scale service providers (e.g. logistics) looking for a low-cost base in the north east of Germany.

Partners of Site

- FLAMMAEROTEC GmbH & Co. KG
- PTS-precision GmbH

Potential Business Partners

- Hoffrichter GmbH
- KGW Schweriner Maschinen- und Anlagenbau GmbH
- Kraus Maffei Automation GmbH
- MAPLAN Maschinenfabrik und Anlagen für Kunststofftechnik
- Schwerin GmbH Prinztechnik Hydraulik Schwerin
- GmbH Prysmian Kabel & System GmbH
- Schoeller Arca Systems GmbH
- Trebing & Himstedt Prozess-
- automation GmbH & Co.KG



Infrastructure Qualified workforce

Raw Materials On-Site None

Services/Utilities

to investors needs; (subsidies up to 50 %)

R&D

Technology and Business Center Schwerin/Wismar



Key Benefits for Investors

- Very large industrially zoned land at low cost (offers in the
- form of bid procedure approx $2.50 \notin (m^2)$;
- No building restrictions and distance to nearest
- residential buildings is 800m;
- Regional railway line with own connection, motorway
- feeder 0.50 km away in planning;

- Favourable prices/conditions for the provision of gas, electricity
- and water by industrial settlement;
- Services and utilities tailored and made possible according
- Favourable financial sponsoring conditions for commercial concerns

Industrial Park Schwedt







Site Classification

Site Owner PCK Raffinerie GmbH

Site Operator IP Industriepark Schwedt GmbH & Co. KG

Full Service (Plug & Play) Yes

Fenced/Open Site Fenced

R&D Support No

Key Data

Total Site Area 250 hectares (618 acres)

Total Free Area 200 hectares (494 acres)

Number of Permanent Staff 1,200

Number of Companies On-Site 70

www.pck.de

Target Investors

- Companies that can integrate into the petroleum value chain e.g. biofuels
- Processes using agricultural raw materials (grain, straw, wood), naphtha, sulfur, polymer propylene as feedstock (up to 200 kt/a), ethanol and those that

Partners of Site

■ In Schwedt: UPM (Paper), Leipa (Paper)

Potential Business Partners

 Many service companies are located on-site:

- Logistics, construction, analytics PCK: PCK Raffinerie GmbH is a
- J.V. between the following mineral oil companies: Ruhr Oel (BP, PdVSA) (37,5%), Shell Deutschland Oil GmbH (37,5%), AET (EN/Total) (25%); PCK refines about 11 M t/a heavy Siberian crude and is European leader in processing costs and margins
- Verbio AG: Is the largest biofuel producer. On-site: bio-ethanol and biodiesel (RME)

are energy intensive

Services/Utilities

Full "Plug & Play" site;

R&D

None

34 Profile of Selected Investment Sites



Key Benefits for Investors

Infrastructure

- Direct access to refinery infrastructure including fuel storage; Pipelines and handling facilities;
- Rail connection with loading facilities on-site, proximity to freeway; On-site power generation with connections to regional high voltage power grid;
- Near by harbor on the river Oder (German/ Polish border)

Raw Materials On-Site

Direct access to value chain of producers on-site (see above); Furthermore access to large grain, straw and wood resources near by in Poland and eastern Germany

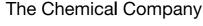
Expertise for operating large scale engineering projects

Chemical Site Schwarzheide



Seddin





Site Classification

Site Owner **BASF Schwarzheide GmbH**

Site Operator **BASF Schwarzheide GmbH** Full Service (Plug & Play)

Yes

rankfurt/Oder

Fenced/Open Site Fenced

R&D Support Yes

Key Data

Total Site Area 230 hectares (568 acres)

Total Free Area 100 hectares (247 acres)

Number of Permanent Staff 2,500

Number of Companies On-Site 16

www.basf-schwarzheide.com

Target Investors

- Companies that can integrate into the plastics or chemical value chain on-site
- Need BASF additive that promotes Bio degradablity of polymerse for production of packaging
- Engineering plastics for automotive/electronic-industries
- Polyurethanes or special-foams for insulation, packaging or mouldings
- User of HCl, a chemical co-product on-site
- Companies that integrate into the knowledge pool of local plastic competence

Partners of Site

- CeChemNet: Chemical sites network
- KuVBB: Plastic network Brandenburg/Berlin
- Plastic Competence Center

Potential Business Partners

Chemical Production:

BASF: Polyurethane basic products and systems, engineering plastics (as PBT), styrenic polymers, ecoflex-biodegradable polymer, foams (EPP, EPS, XPS), water-based coatings, cropprotection agents Cyclics Europe GmbH: CBT-Engineering plastic Biopetrol GmbH: Biodiesel MIWAC: Polyaluminium chloride SDC Materials GmbH: Nano materials Petopur GmbH: PET derivatives

- Plastics Processing: Febra Kunststoffe GmbH: Neopolen mouldings Puralis GmbH: Elastomers relog plastics GmbH: Plastics recycling Equipment Engineering:
- Services: Talke-Logistic-Storage Bertschi-Container terminal Air Liquide-Technical gases

Infrastructure

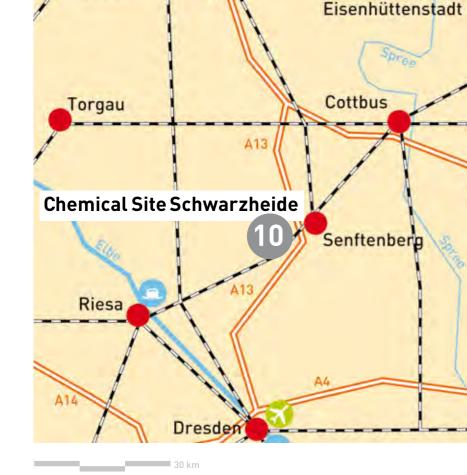
container terminal on-site;

Raw Materials On-Site

Services/Utilities Utilities required for chemical production ("Plug & Play" full service site)

R&D

36 Profile of Selected Investment Sites





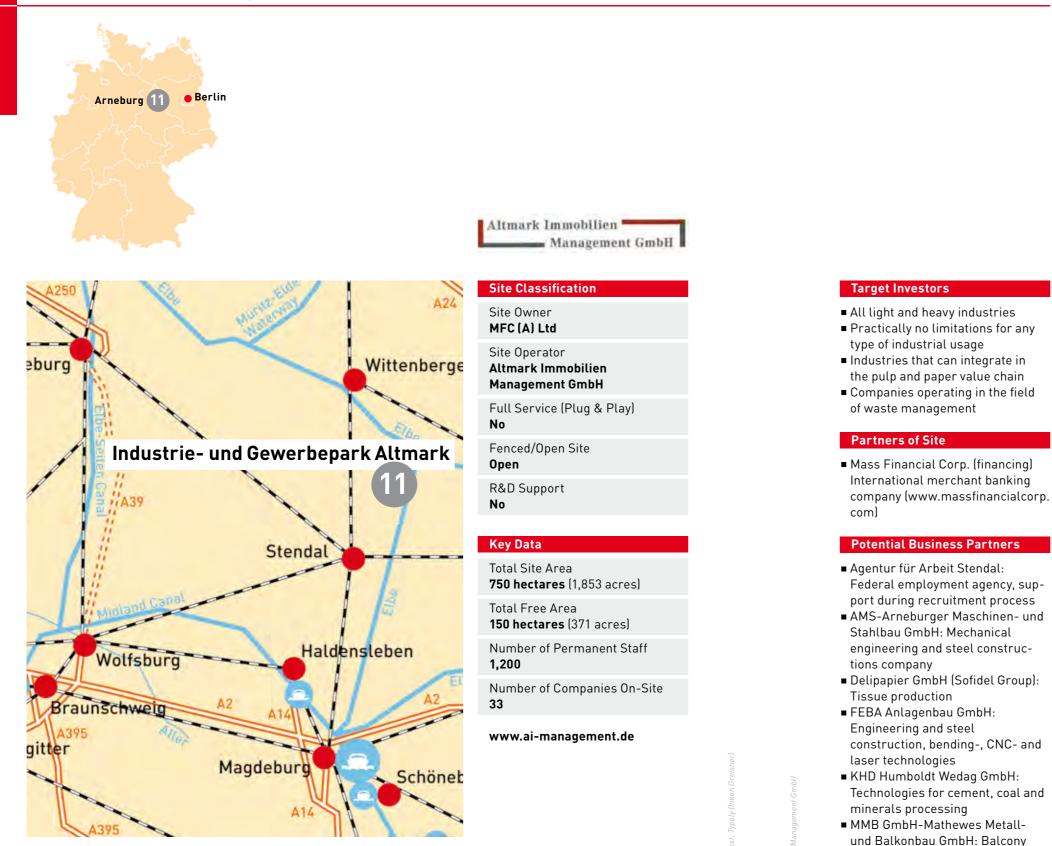
Key Benefits for Investors

- Direct access to rail connection and motor way and
- "block train" shipping to harbour the daily low cost service
- to Antwerp, Rotterdam or East-Europe; storage space for
- Chemicals on-site, natural gas power station, waste incineration
- and waste water treatment plant

Direct access to value chain of producers on-site (see below)

Companies can use the benefits of our pilot plant for upscaling chemical synthesis, analytics and engineering services.

Industrie- und Gewerbepark Altmark



³⁰ km

38 Profile of Selected Investment Sites



Key Benefits for Investors

Infrastructure

- Rail connection on-site with direct connection to the network of Deutsche Bahn;
- Direct harbor access to the Elbe River with waterways to Hamburg,
- the Magdeburg intersection and Prague;
- Proximity to freeway feeder;
- Proximity to airfield Stendal-Borstel;
- Office space, warehouses and production halls available for rent or sale on-site

Raw Materials On-Site

Proximity to substancial regional and local sources of wood; Pulp from the pulp plant on-site Zellstoffwerk Stendal GmbH (ECF and TCF pulp)

Services/Utilities

- Electricity: Power supply via two 110 kV power grid lines;
- 16 MVA power supply;
- Natural gas station on-site;
- Water works and sewage treatment on-site;
- Support and consulting for project financing;
- Co-financing by site owner;
- Support by site operator throughout the entire application and
- permiting processes;

R&D

None

systems, aluminium-, steel- and

 Zellstoff Stendal GmbH (Mercer International Inc.): Pulp mill

metal construction

Good established communication with local authorities

Agro-Chemie Park Piesteritz







Site Classification

Site Owner SKW Stickstoffwerke Piesteritz GmbH

Site Operator SKW Stickstoffwerke Piesteritz GmbH

Full Service (Plug & Play) **Yes**

Fenced/Open Site Fenced

R&D Support **Yes**

Key Data

Total Site Area **220 hectares** (544 acres)

Total Free Area **30 hectares** (74 acres)

Number of Permanent Staff 770 – only SKW

Number of Companies On-Site >30

www.skwp.de

Target Investors

Companies which:

- Can integrate into the local value chain (see below)
- Are active in the agrochemical market
- Industrial biotech and processes are based on renewable resources
- Have large demand for steam, natural gas and electricity

Partners of Site

 Agrofert Group: Producer and sales network for agricultural products

Potential Business Partners

- Agrochemisches Institut Piesteritz e.v. (research)
- Borealis Agrolinz Melamine Deutschland GmbH (melamine production)
- Berufsbildungszentrum Elbe (education)
- Digi Table GmbH (electrical engineering)
- ENEGRO Piesteritz GmbH & Co.
 KG (protein manufacture)
- Hertel GmbH Leipzig (servicing/ maintenance of chemical plants/ equipment)
- Kramer GmbH + Co. KG (civil engineering)
- Louis Dreyfus Commodities Wittenberg GmbH (biodiesel production)
- MAXI KRAFT (crane service)
- PCI Augsburg GmbH (building materilas production)
- Räcklebe & Totz Industrieservice GmbH (servicing/maintenance)
 SKW Stickstoffwerke Piesteritz
- SKW Stickstoffwerke Piesteritz GmbH (ammonia, urea, nitric acid production)
- Stadtwerke Leipzig GmbH (biomass power station, electricity/steam generation)
- Thyssen Krupp Xervon GmbH (scaffolding)

R&D Investors have and analytics. Basic R&D can Halle-Wittenb

30 km



Key Benefits for Investors

Infrastructure

Excellent logistics:

- Nearby junction of the A 9 motorway and highways B2/187 port on the river Elbe;
- 35 km of SKW-own railway track with connection to Deutsche Bahn located in center of highly efficient farming community with access to all significant agro-adresses in Germany;
- One of the largest natural gas consumers in Germany connection to HP gas pipeline with ample spare capacity

Raw Materials On-Site

- As producer of ammonia and urea, there is surplus capacity for urea, melamin, nitrogen, hydrogen;
- Largest carnola mill and biodiesel plant in Europe on-site thus there is the opportunity to benfit from on-site availabiliy carnola press cake and glycerine

Services/Utilities

- 24/7 Full services of "Plug&Play" are offered by SKW;
- Net exporter of power and has excess steam available;
- Projects requiring rapid approval production facilites in line with
- BImSchG or SMEs can benefit from preliminary awarded approvals;
- Furthermore investments for renewables will benefit from
- "incentives for enviromentally sustainable projects" on-site

Investors have access to application oriented R&D for agrochemicals and analytics.

- Basic R&D can be done in collaboration with Martin-Luther University Halle-Wittenberg in the Agrochemical Institute.
- SKW Agriculture Application Research Facility (170 hectares) in Cunnersdorf

SKV. PIESTERITZ

ChemiePark Bitterfeld Wolfen





leben Potsdam Seddin Schönebeck Roßlau Wittenberg Dessau, Torgau Aken ChemiePark Bitterfeld Wolfen Hatte Riesa Leipzig

Site Classification

Site Owner P-D ChemiePark Bitterfeld Wolfen GmbH

Site Operator P-D ChemiePark Bitterfeld Wolfen GmbH

Full Service (Plug & Play) No

Fenced/Open Site Fenced and Open

R&D Support Yes

Key Data

Total Site Area 1,200 hectares (2,965 acres)

Total Free Area 170 hectares (420 acres)

Number of Permanent Staff 11,000

Number of Companies On-Site 360

www.chemiepark.de

Target Investors

- Producers for the photovoltaic industry. On our site you will find companies along the entire value chain from salt to the PV- cell and modules
- Producers of fine and specialty chemicals
- Producers of metallurgical goods and plastic manufacturers
- Raw materials suppliers for base chemicals

Partners of Site

Member of the "CeChemNet" the chemical producers' network in Eastern Germany

Potential Business Partners

- Akzo Nobel: Chlorine, caustic soda, hydrogen chloride, hydrochloric acid, hydrogen
- Bayer: Resins and laquers
- Dow: Metylcellulose
- Evonik Degussa: Chlorosilanes
- ICL-IP: Flame retardants; polymer additives, phosphorus trichloride, phosphoryl chloride
- ReactiveWetCoating: Partners from science and economy with core competencies in coating, a range of function in chemistry and special engine construction, respectively, developed within this innovative regional basic growth a worldwide novel coating procedure of functional wet coating
- TGZ: The Science and Technology Center focused on supporting the establishment of technologyoriented companies and the development of synergetic effects between businesses, university as well as non-university research institutions

Infrastructure Leipzig/Halle; on-site;

Raw Materials On-Site

Availability of chlorine, hydrogen chlorine, caustic soda, phosphorus trichloride, phosphoryl chloride, tetrachlorsilane, trichlorosilane, alkyl chlorides, hydrogen, nitrogen, oxygen

Services/Utilities

Ability to agree service package with the 300 service companies on-site including those providing the utilites required for chemical production.

R&D

_____ 30 km



Key Benefits for Investors

Direct access to motorway and proximity to International Airport

Rail connection with bimodal (rail/road) loading facilities on-site;

Power generation on-site with connections to high voltage power grid (two high voltage lines are linked to site);

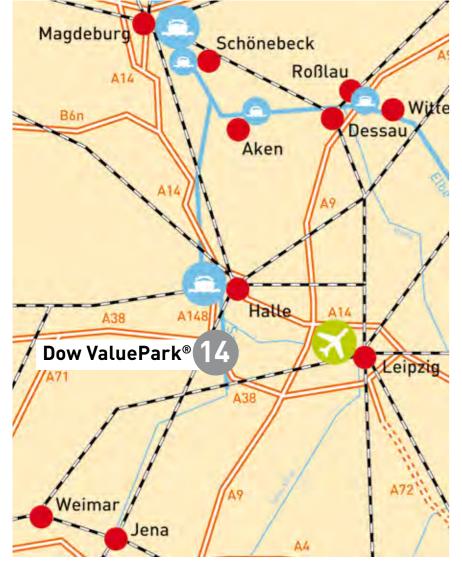
Utilities and technical gases are provided by 18 km long pipe network

Feedstock integration with chemical sites nearby

Branch of the Fraunhofer Institute for Mechanics of Materials (IWM)

Dow ValuePark[®] Schkopau





30 km

Site Classification

Site Owner **Dow Olefinverbund GmbH**

Site Operator Dow Olefinverbund GmbH

Full Service (Plug & Play) Yes

Fenced/Open Site Fenced

R&D Support Yes

Key Data

Total Site Area 650 hectares (1,606 acres)

Total Free Area 40 hectares (99 acres)

Number of Permanent Staff 1,900 + (ValuePark®1,200)

Number of Companies On-Site 20

www.dow.com/valuepark

Target Investors

Companies that can integrate into local value chain: Polymer converters, raw material manufacturers, producers of polymer additives, companies that can be integrated into the automotive value chain, polymer and rubber related start-ups, chlorine consumers

Partners of Site

- Member of the "CeChemNet" regional initiative for Eastern Germany
- Dow Chemicals global operations
- POLYKUM e. V.: Central German Association for Promoting Polymer Development and Plastics Technology

Potential Business Partners

- A number of polymer converters, companies producing compounds and additives, located on the ValuePark[®]
- Arakawa Europe GmbH: HCR Dow: Polyolefins, acrylic acid,
- caustic soda, anilin
- Equipolymers GmbH: PET
- Ineos Vinyls Deutschland GmbH and Vinnolit GmbH & Co.KG: PVC
- Linde AG; Hoyer GmbH; MKL Mitteldeutsche Kunststoff-Logistik GmbH&Co.KG; Finsterwalder Transport und Logistik GmbH; Jacobs Alliance Service GmbH
- MITZ: A PPP organization focused on promoting & supp. start-ups
- PAZ: Pilot plant facility for polymer synthesis and processing jointly operated by Applied Polymer Research (IAP) and Mechanics of Materials (IWM) institutes of the Fraunhofer Society. PAZ can produce commercial test volumes (100t) of polymers from Monomers to molded samples
- POLYKUM e.V.: Regional polymer cluster initiative
- Styron Deutschland GmbH: Polystyrene, expandable polysterene, synthetic rubber

Infrastructure loading facilities on-site; Proximity to freeway; high voltage power grid;

grades)

Services/Utilities

R&D



Key Benefits for Investors

- Direct access to rail connection with bi-modal (rail/road)
- Salt caverns for storage of gas;
- Power generation on-site with connections to regional
- Partnership with Dow as world scale chemical company

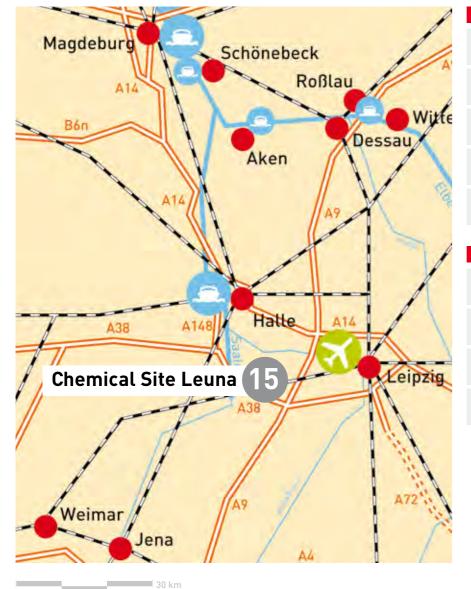
Raw Materials On-Site

- Direct access to value chain of producers on-site (see below); Different grades of synthetic rubber;
- Polyethylene, polypropylene, polystyrene, PET, acrylic acid,
- caustic soda, chlorine, anilin, butadien, hydrocarbons resins,
- redispersible dispersion powder, PVC (emulsion and suspension

- All utilities required for chemical production
- ("plug & play" chemical park concept);
- Incinerator for solids (rotary kiln) liquids and gasses
- Fraunhofer IAP and IWM institutes with Polymer
- Pilot Plant for synthesis and IM;
- Research Center for synthetic rubber and PET;
- MITZ: location for R&D start-ups, related to Polymer science;
- Beginning 2010 the Fraunhofer Center for Silicon Photovoltaics
- CSP will additionally operate a Research Center for Silicium
- Photovoltaic inside of the Dow ValuePark®.

Chemical Site Leuna





INFRALEUNA

Site Classification

Site Owner companies on-site

Site Operator InfraLeuna GmbH

Full Service (Plug & Play) Yes

Fenced/Open Site Fenced

R&D Support Yes

Key Data

Total Site Area 1,300 hectares (3,212 acres)

Total Free Area 70 hectares [173 acres] 1

Number of Permanent Staff 9,000

Number of Companies On-Site more than 100

www.infraleuna.de

¹ InfraLeuna GmbH – owner of the still available areas for settlement

Target Investors

- Producers of chemicals by traditional processes and those using industrial biotech technologies
- Companies producing industrial products from renewable resources
- Companies that can integrate into the local value chain and product network
- User of on-site services and utilities (power, security, effluent treatment etc.)

Partners of Site

- CeChemNet regional cluster for chemical sites in Eastern Germany, Cluster Chemie/ Kunststoffe
- Several research institutions and universities (e.g.: Fraunhofer, FH Merseburg, Polykum e.V. etc.)

Potential Business Partners

- Arkema Hydrogen peroxide
- BASF Polyamide 6 and 6.6
- DOMO Caprolactam,
- polyamid 6, ammonium sulfate, phenol, acetone, cyclohexanone Dow – LDPE
- FP-Pigments Specialty pigments
- Innospec PE-waxes, EVA, flow improver
- KataLeuna (CRI) Catalysts
- LCP Hydroxy benzoic acid
- LEUNA-Harze Epoxy resin systems
- LEUNA-TENSIDE Anionic and nonionic tensides, flame retardants
- Linde Technical gases
- MINAKEM Custom synthesis
- Momentive Glues and resins, formaldyhyde, plastics dispersions Quadrimex – Sulfur chemistry
- Quinn Chemicals MMA
- (under construction) Taminco – Methylamines and derivates
- TOTAL Refinery products, methanol
- Xentrys Fibers

Key Benefits for Investors Infrastructure

relevant facilities on-site; treatment facilities; production companies;

Raw Materials On-Site

cooperations);

Services/Utilities

investment grants etc.;

R&D

(under construction)



- Direct access to important rail and road connections;
- 3 on-site power plants, fresh and drinking water and waste water
- Shovel-read plots with pre-approved plans for construction
- Infrastructure and service company;
- Modern refinery (TOTAL), 30 national and international chemical
- Secure and fenced chemical site

- Product-integration between on-site companies (synergies and
- Natural gas, crude oil, technical gases, syngas, methanol,
- refinery products, polyamide 6 and 6.6, UF-resins, hydrogen peroxide, surfactants, amines, formaldehyde, DMF, acetone, phenol, PE-waxes, plastics and latex dispersions, specialty pigments etc.
- One-stop provider for utilities and services (e.g.: power, steam, fresh and drinking water, logistics, water disposal, telecommunications, site security, fire brigade, analytics, works medical services);
- State-of-the-art infrastructural facilities;
- Transparent pricing structure for services and utilities;
- Support during settling-in period on-site e.g. plant approvals,
- Service providers for all industrial issues on-site
- Nearby universities and institutes offer R&D-cooperation and provide highly qualified manpower;
- Chemical-Biotechnological Process Center (CBP) by Fraunhofer

Industriepark Schwarze Pumpe



Schwarze Pumpe

Site Classification

Site Owner Several

Site Operator VSG GmbH

Full Service (Plug & Play) Yes

Fenced/Open Site Fenced

R&D Support Yes

Key Data

Total Site Area 680 hectares [1,680 acres]

Total free Area (in ha) 70 hectares (173 acres)

Number of Permanent Staff 3,600

Number of Companies On-Site approx.80

www.industriepark.info

Target Investors

- Focus is on the business branches of coal (lignite) finishing, the paper and plastics industry as well as the silicon-processing industry (photovoltaics)
- Users of formaldehyde, methanol and technical gases
- Users of extensive power related services

Partners of Site

The businesses are active in relevant clusters

Potential Business Partners

- Alpiq Spreetal GmbH: Power generation
- ALSTOM Power Service GmbH Schwarze Pumpe: Power plant construction, power plant maintenance
- BEA Elektrotechnik und Automation Technische Dienste Lausitz GmbH: Installation of electrotechnical and automated plants
- Dynea Erkner GmbH: Formaldehyde
- Hamburger Rieger GmbH & Co. KG, Papierfabrik Schwarze Pumpe: Paper from used paper and corrugated cardboard
- Linde Gas Produktionsgesellschaft GmbH & Co. KG: Technical gases
- Siemens AG TS IS MI: Maintenance of electrotechnical plants
- Silicon Pilot Production GmbH: Poly-silicon for PV applications
- Sulzer Pumpen (Deutschland) GmbH: Pump service, armatures, drive gear and compressors
- ThyssenKrupp Xervon GmbH: Industrial services and assembly of engineering plants, electrical as well as measuring and control technology
- Vattenfall Europe Generation AG: Power generation, pilot plant for low CO² ("Oxyfuel" process)
- Vattenfall Europe Mining AG: Coal finishing, operating open-cast mines, various services

______ 30 km



for photovoltaics

Services/Utilities

at the site; Own fire department

R&D

Yes

Key Benefits for Investors

Infrastructure

- Vicinity to eastern Europe with excellent logistics infrastructure (motorway, rail);
- Two industrial water purification plants, waterworks
- (fresh water and industrial water);
- Large lignite fired power station on-site;
- Site is net exporter of power

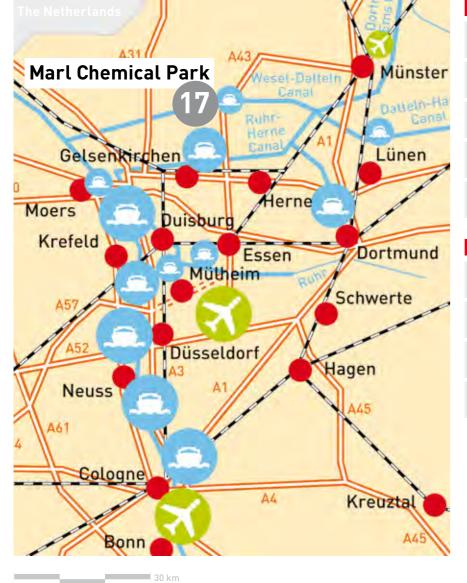
Raw Materials On-Site

Coal dust from lignite finishing; Gypsum from the power plant; Formaldehyde, methanol, technical gases, poly-silicon produciton

Services for power plant and open-cast mining technology as well as for electro-technical plants, plants for automation and engineering; Maintenance for the chemical industry; Laboratory services and comprehensive and general services

Marl Chemical Park







Site Classification

Site Owner Evonik

Site Operator Infracor GmbH

Full Service (Plug & Play) Yes

Fenced/Open Site Fenced

R&D Support Yes

Key Data

Total Site Area 650 hectares (1,606 acres)

Total Free Area 60 hectares [148 acres]

Number of Permanent Staff 10,000

Number of Companies On-Site 30

www.chemsite.de

Infrastructure highway, pipeline network; steam (4, 20, 70 bar);

Raw Materials On-Site

facilities

distance.

R&D

Services/Utilities

 Air Products (Epoxy Resins) AQura (Analytical Services)

Potential Business Partners

- Evonik Degussa
- Ineos Styrenics

Target Investors

Partners of Site

Public partners:

Industry partners of the ChemSite Initiative

local communities

Chemicals and polymers

producing companies – with a

demand of infrastructure (ener-

gies, utilities, effluents, logistics)

Industrial biotechnology research

State of North-Rhine Westphalia,

Chamber of Commerce & Industry,

and production companies

Ineos Nova

Air Liquide

- Infracor
- ISP
- LANXESS Buna
- Linde
- NEW (Natural Energy West)
- Oxea
- OXENO (C4-Chemistry)
- PolymerLatex
- Rohm & Haas (Butyl Acrylate)
- Sasol Germany (Surfactants)
- StoHAAS (Acrylic Acid),
- UTM (Intermodal Terminal Rail/ Road)
- VESTOLIT (PVC)

Many more chemicals producing and processing companies are in a close distance.

50 Profile of Selected Investment Sites



Key Benefits for Investors

- On-site connections to the European waterway, railway,
- Comprehensive materials flow, utilities and energy supply network; Three gas- and coal-fired power plants (cogeneration),
- Different kind of water qualities, cooling water, compressed air, ammonia cooling network, air gases, hydrogen;
- All kinds of storage facilities; sewage plants, waste incineration plant
- More than 4.000 different products: From C4 fractions to derivatives, from ethyl benzene to polystyrene, from chlorine electrolysis to PVC, from acetylene to THF, from fatty alcohols and ethylene oxide to surfactants, and from acrylic acid to butyl acrylate - to name just a few products from the extensive range.
- Full "Plug&Play" service site;
- Logistic, technical and analytical services, workshops, catering,
- infrastructure management, public relations, ESHQ-services,
- regulatory affairs management, site fire department, site security,
- medical service, engineering services, liquid dosing and filling
- Analytical services, process technology, three Sience-to-Business-Centers for Nanoelectronics, biotechnology and energy efficiency welcome partners.
- Several universities and well known research institutes in close

Dorsten-Marl Industrial Park



hemSite Your base for chemical production in Europe **Site Classification** Site Owner Site Operator Open industrial park Full Service (Plug & Play) Fenced/Open Site

R&D Support

Total Site Area 136 hectares (336 acres)

Total Free Area 20 hectares (49 acres)

Number of Permanent Staff

Number of Companies On-Site

www.chemsite.de www.industriepark-dorstenmarl.de

Target Investors

- Chemicals and polymers processing companies (downstream operations): With a basic demand of infrastructure on-site; With the need for an excellent connection to the European transportation system (highway, rail, waterway)
- Research centers with chemicals or polymers related activities
- Recycling companies
- Logistic companies

Partners of Site

Dorsten-Marl Industrial Park is one of the six ChemSite locations in the Ruhr area with strong partners in the chemical industry and in politics, State government of North-Rhine Westphalia.

Potential Business Partners

- On-site: PolymerLatex (R&D for Latices), Genan (recycling of tires), Hubert Klaesener (chemicals logistic), En-DI Loick (Biogas), fright centers of DHL and DPD, Thier (polymer logistic), ReFat (fat recycling), Deutsche Asphalt (asphalt recycling and production), Dela (recycling and environmental technology) and others
- Companies in Marl Chemical Park (13 km distance): Air Liquide, Air Products (Epoxy Resins), AQura (Analytical Services), Evonik Degussa, Ineos Styrenics, Ineos Nova, Oxea, Infracor, ISP, LANXESS Buna, Linde, NEW (Natural Energy West), OXENO (C4-Chemistry), PolymerLatex, Rohm & Haas (Butyl Acrylate), Sasol Germany (Surfactants), StoHAAS (Acrylic Acid), UTM (Intermodal Terminal

Rail/Road), VESTOLIT (PVC)

Services/Utilities

Lots of companies with experience in the chemicals producing and processing industry are located in the area - companies providing maintanance, logistics, engineering, environmental and regulatory affairs support, just to list a few examples

R&D

TechnoMarl on-site, several univerities and well known research institutes in close distance



Key Benefits for Investors

Infrastructure

- Excellent logistic connections with direct access to
- the European transportation system (highway, rail, waterway); Industrial port;
- Completely developed site with supplies of electricity,
- natural gas, potable water;
- Connection to municipal waste water treatment plants;
- Separate rainwater collection system;
- Huge cluster of chemicals and polymers producing and processing companies in close distance

More than 4,000 different products are produced on chemical sites in close vicinity e.g.polymers (PA, PEEK, PE, PP, PS, EPS, PVC, rubber, latices) surfactants, coatings and colorants

Chemical Park RÜTGERS, Castrop-Rauxel



Infrastructure in close distance;

and phenol

Partners of Site

Target Investors

utilities, effluents);

are welcome

Chemicals and polymers produc-

ing and processing companies:

With a demand of infrastructure

With the need for excellent logistic

connections (truck, rail, barges)

Investors from other industries

(services, logistics, energies,

- Industry partners of the ChemSite Initiative
- Public partners: State of North-Rhine Westphalia, Chamber of commerce & industry, local communities

Potential Business Partners

- RÜTGERS Germany GmbH
- Evonik New Energies
- Emscher Genossenschaft
- Castro Carbon
- AHV

Many more chemicals producing and processing companies are in a close distance.

natural gas R&D

Analytical services, laboratories Several universities and well known research institutes in close distance



Key Benefits for Investors

- Excellent logistic connections with direct access to the German highway, rail and waterway system;
- Completely developed site with supplies of electricity, steam,
- natural gas and different waters;
- Waste water collection and sewage plant;
- Huge cluster of chemicals and polymers producing companies
- Network of research institutes in close vicinity

Raw Materials On-Site

Coal tar distillation products: Electrode binders, oils, naphtalene

Services/Utilities

- Logistic, technical services, IT and analytical services, workshops, warehouses, port facilities (liquids & solids), accounting,
- infrastructure management, public relations, ESHQ-services,
- regulatory affairs management, site fire department, site security,
- medical service, engineering services. Gas-fired power plant
- (cogeneration), steam (4, 41 bar), waters, compressed air, nitrogen,

Gelsenkirchen Site





nemSite Your base for chemical production in Europe

Site Classification

Site Owner Ruhr Oel

Site Operator ROG, Sabic

Full Service (Plug & Play) No

Fenced/Open Site Fenced

R&D Support No

Key Data

Total Site Area **460 hectares** (1,137 acres)

Total Free Area 20 hectares (49 acres)

Number of Permanent Staff 2,500

Number of Companies On-Site 2

www.chemsite.de

Target Investors

Partners of Site

Evonik, Oxea

production)

Service providers

Base chemicals and/or polymers

consuming companies, service

providers supporting existing

activities, power producers

Site is used by ROG and Sabic.

Infracor are service providers.

Potential Business Partners

Power producers (for historic

reasons Scholven and Horst do

not have an integrated power

consuming companies

Base chemicals and/or polymers

Main customers are: Ineos,

E.ON, Air Liquide, Gelsenwasser,

Infrastructure Direct access to raw materials, "as if" integration into refinery/ cracker/derivative units, located in the center of the Ruhr Region

Raw Materials On-Site

Full spectrum of mineral oil products (including bitumen, green coke, calcinate, hydrogen, syngas) and a range of base chemicals (various grades of PE and PP, ethylene, propylene, C4 cut, benzene, o-xylene, p-xylene, cyclohexane, ammonia, methanol, hydrogen, sulfur), all products are sold to the merchant market

Services/Utilities

Logistics, technical and analytical services, workshops, catering, infrastructure management, site fire department, site security, medical service. Steam (3, 15, 84 bar), water, compressed air, air gases, hydrogen, heating gas are available. If an investor is asking for a debottlenecking of infrastructure the investor has to finance these activities.

R&D

Does not play a role at the Gelsenkirchen site. Nevertheless several univesities and well known research institutes are located in close by.



Key Benefits for Investors

Deutsche Gasrußwerke Dortmund







Site Classification

Site Owner **City of Dortmund**

Site Operator KG Deutsche Gasrußwerke

Full Service (Plug & Play) Yes

Fenced/Open Site Fenced

R&D Support No

Key Data

Total Site Area 25 hectares (62 acres)

Total Free Area 4 hectares (10 acres)

Number of Permanent Staff 200

Number of Companies On-Site 2

www.chemsite.de

Target Investors

Chemicals and polymers produc-

ing, processing and recycling

companies: With a demand of infrastructure (services, energies); With the need for excellent logistic

- connections (truck, rail, barges) Investors from other industries
- are welcome

Partners of Site

Industry partners of the ChemSite Initiative

local communities

Public partners: State of North-Rhine Westphalia, Chamber of Commerce & Industry,

Potential Business Partners

KG Deutsche Gasrußwerke: Carbon Black

Many chemicals producing and processing companies are in a close distance.

Infrastructure

Raw Materials On-Site

Services/Utilities

Logistic, technical and IT services, workshops, warehouses, port facilities (liquids), accounting, ESHQ-services, regulatory affairs management, site security. Two power plants (cogeneration), steam, compressed air, liquid nitrogen, liquid oxygen, natural gas

R&D

distance



Key Benefits for Investors

- Excellent logistic connections with good access to the German highway, rail and waterway system, located in the harbour of Dortmund;
- Completely developed site with supplies of electricity,
- steam and natural gas;
- Part of a huge chemicals and polymers producing
- and processing cluster

Carbon black and pigment black as filler for the tyre and rubber industry and in the dyestuffs, printing ink and plastics industries

Several universities and well known research institutes in close

Chemiepark Bayer Schering Pharma Bergkamen





Chemiepark Bayer Schering Pharma Krefeld Dortmund Essen Schwerte Düsseldorf Hagen Neuss Cologne A4 Kreuzta

Site Classification

Site Owner **Chemiepark Bayer Schering** Pharma Bergkamen (BSP BGK)

Site Operator Infrastructure BSP BGK

Full Service (Plug & Play) No

Fenced/Open Site Fenced

R&D support Yes

Key Data

Total Site Area 110 hectares (272 acres)

Total Free Area 40 hectares (99 acres)

Number of Permanent Staff 2,100

Number of Companies On-Site 6

www.pharma-und-chemiepark.de

Target Investors

 Pharmaceuticals, biotechnology, fine and specialty chemicals, food-processing

Partners of Site

- CURRENTA GmbH & Co. OHG (Disposal)
- BAYER TECHNOLOGY SERVICES (Technological Development)
- BAYER BUSINESS SERVICES (IT-Technology)

Potential Business Partners

- AIR LIQUIDE GmbH (Nitrogen)
- BAYER SCHERING PHARMA AG (Pharmaceutical APIs, Contrast Media)
- BAYER TECHNOLOGY SERVICES (Engineering)
- CHEMTURA ORGANOMETALLICS GmbH (Chemical industry, Metalalkyls, Organotin Compounds)
- HUNTSMAN ADVANCED MATERIALS (Germany) GmbH (Synthetic a. Formulated Polymer Systems)

Infrastructure

The Bayer Schering Pharma Chemical site Bergkamen is located close to the highway A1 and A2 interchange "Kamen". There exists a direct rail connection and 110 kV electricity supply.

reagents)

Services/Utilities

Energy (electricity, steam, water of various qualities, NH3-cold, natural gas, nitrogen, hydrogen, compr. air), maintenance, shops, engineering, fire brigade, security, occupational health, authorities management, explosion protection, technical surveillance, environmental monitoring, vocational education and training, waste water treatment, incineration of wastes, solvent recycling, IT, canteen

R&D



Key Benefits for Investors

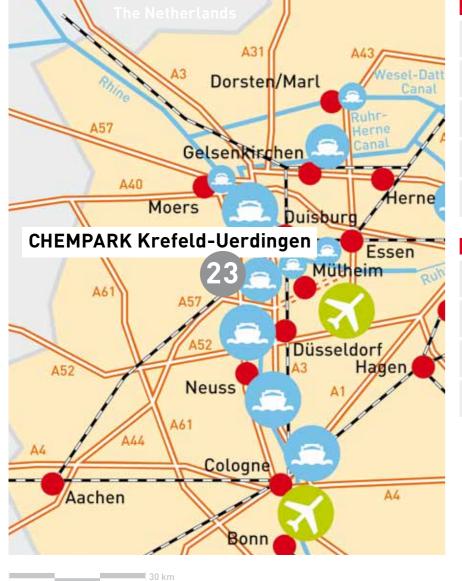
Raw Materials On-Site

Solvents (alkalis, hydrocarbons, chlorinated hydrocarbons, chemical

cGMP-Fermentation capacities in laboratory scale (10L and 50L) as well as pilot plant scale (500L, 5m³ and 50m³), cGMP-Down-Stream Recovery technologies in lab scale and pilot plant scale (S1 and BS2)

CHEMPARK Krefeld-Uerdingen







Site Classification

Site Owner Bayer AG, Lanxess AG

Site Operator CURRENTA

Full Service (Plug & Play) Yes

Fenced/Open Site Fenced

R&D Support Yes

Key Data

Total Site Area 260 hectares (642 acres)

Total Free Area 40 hectares (99 acres)

Number of Permanent Staff 7,000

Number of Companies On-Site 17

www.chempark.de



Key Benefits for Investors

Infrastructure Fully integrated park with outstanding infrastructure, direct ship, railway and highway access, three airports nearby, strong R&D network, possibilities for cooperations

Raw Materials On-Site

Services/Utilities

Fully equipped "Plug & Play site"; Utilities: steam, gases, refrigeration, compressed air, demineralised water, waste water treatment, land filling and incineration services, safety and security, permit advice, analytical services, training and translations

R&D

TÜV SÜD Chemie Service GmbH

UL International TTC GmbH



GmbH

Target Investors

ing industry

Partners of Site

Wirtschaftsförderungs-

gesellschaft Krefeld mbH

Potential Business Partners

Bayer MaterialScience AG

Ausbildungsinitiative Rheinland

Member of ChemCologne

All investors engaged in chemical

synthesis, pigments, composites,

environmental technologies and in

addition companies in the process-





Basic inorganic chemicals: e.g. chlorine, hydrogen chloride, ammonia, sodium hydroxide, carbon monoxide, inorganic pigments: Chromium oxide, zinc oxide, iron oxide

Basic organic chemicals: e.g. benzene, nitrobenzene, caprolactam, phenol, aniline, formaldehyde, acetone, toluene, monochlorbenzene,

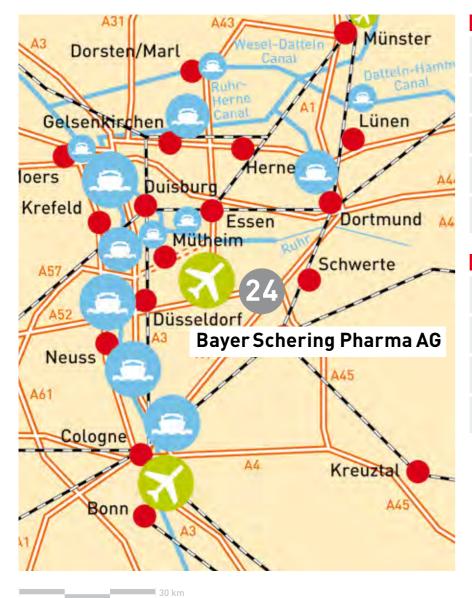
benzyl chloride, bisphenol A, cylohexane, adipic acid

Polymers: MDI, polycarbonates, polyamides

Skilled scientific personal available, CURRENTA offers full range of analytical services, laboratories for rent, strong R&D network on-site

Bayer Schering Pharma AG, Supply Center Wuppertal Elberfeld







Site Classification

Site Owner Bayer AG, Leverkusen

Site Operator Bayer Schering Pharma AG Full Service (Plug & Play)

Yes

Fenced/Open Site Fenced

R&D Support **Yes**

Key Data

Total Site Area **18 hectares** (44 acres)

Total Free Area **2 hectares** (5 acres)

Number of Permanent Staff **approx. 1,250**

Number of Companies On-Site **5**

www.pharma-und-chemiepark.de

Target Investors

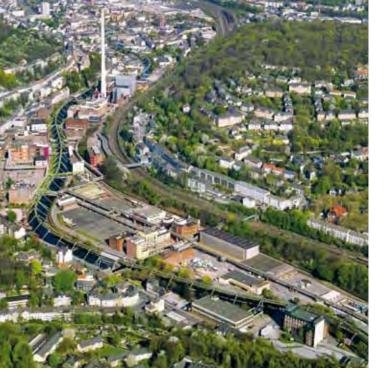
Producers of pharmaceutical chemicals and active (pharmaceutical) ingredients including fine chemicals, starting from biological or chemical sources – preferably small to medium-sized chemical, biological or technically orientated companies – which would benefit from the given "pharmaceutical environment"

Partners of Site

- Wirtschaftsförderung Wuppertal (municipal economic development agency)
- CURRENTA GmbH
- Member of ChemCologne

Potential Business Partners

- AI Curis (R&D company; Focus: API for infectious diseases)
 Bayer HealthCare AG
- Dayer Realincare AG
- Bayer Schering Pharma AGBayer Technology Services
- Bayer Business Services
- CURRENTA
- (infrastructure services)



Key Benefits for Investors

Infrastructure

- Standard utilities + purified water for pharmaceutical use,
- waste water treatment plant, especially suited for active ingre-
- dient waste water;
- Centralized off-gas incineration unit;
- Ammonia coolant system; cGMP- and DIN ISO 14001-compliant infrastructures (incl. high rack warehouse)

Raw Materials On-Site

Several solvents (e.g. acetone, caustic soda, ethanol, hydrochloric acid, isopropanol, methanol, toluene) for pharmaceutical use in centralized

Services/Utilities

tank farm

R&D

Standard services (site security, occupational health and safety); cGMP-compliant services (i.e. training, documentation, auditing, maintenance and engineering); Support for start-up companies possible

Support for start-up companies possible

Pilot plant for biotech processes and production capabilities for microbial and mammalian cell culture derived products, incl. lab and bench scale plants

Industriepark Oberbruch





Site Classification

Site Owner NUON Energie und Service GmbH

Site Operator NUON Energie und Service GmbH

Full Service (Plug & Play) **Yes**

Fenced/Open Site Fenced and Open

R&D Support **No**

Key Data

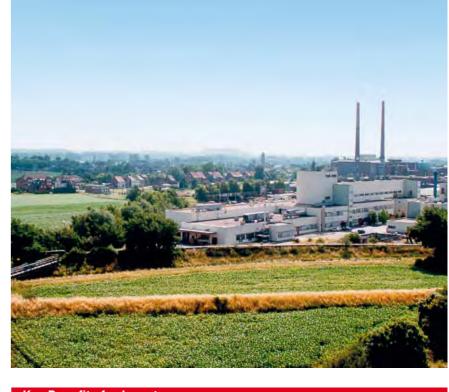
Total Site Area **110 hectares** (272 acres)

Total Free Area **25 hectares** (62 acres)

Number of Permanent Staff **2,000**

Number of Companies On-Site **20**

www.industriepark-oberbruch.de



Target Investors

 Companies focusing on processing chemicals, plastics, new materials would benefit from the existing value chains: Carbon fibers/composites, polymer preforms, fuel cells, industrial biotechnology, new energy technologies

Partners of Site

 A.Frauenrath Group; Florack construction firm; n.v. NUON; WfG Kreis Heinsberg, AGIT; NRWinvest
 Member of ChemCologne; ECSPP, VCI

Potential Business Partners

- Bilfinger und Berger Industrial Services (BIS) – Maintenance and Construction
- CFCL Solid oxide fuel cells for m-CHP
- GNT Group Colouring foodstuff
- NUON Energie und Service GmbH Service and Utility provider
- Polymer Oberbruch –
 Polyester-Granulate from PTA
- SAXID Brake pad technology
- Toho Tenax Europe Carbon Fibres/Composites

Key Benefits for Investors

Infrastructure

Standard utilities incl. new cogeneration power plant; High capacity chemical-biological waste water treatment plant; Industrial gases; Cooling media

Raw Materials On-Site

Services/Utilities

None

R&D

Full "plug&play" service site; Site security, occupational health and safety emergency management;

Waste management and emission protection, analytical laboratory; Additional available services: Logistics, IT, catering, medical services

Several universities, colleges, research institutes nearby, including the centers of excellence: RWTH Aachen University (renowned for chemistry and engineering), Jülich Research Center

CHEMPARK Dormagen





CHEMPARK業 Europe's chemical park

Site Classification

Site Owner Bayer AG, Lanxess AG

Site Operator CURRENTA

Full Service (Plug & Play) Yes

Fenced/Open Site Fenced

R&D Support Yes

Key Data

Total Site Area 360 hectares (890 acres)

Total Free Area 25 hectares (62 acres)

Number of Permanent Staff 6,900

Number of Companies On-Site 29

www.dormagen.chempark.de

All investors engaged in chemical Infrastructure synthesis, petrochemicals, com-

posites, environmental technologies and in addition companies in the processing industry

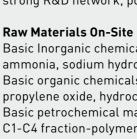
Partners of Site

Target Investors

- Wirtschaftsförderungsgesellschaft Rhein-Kreis Neuss mbH
- Stadt Dormagen, Fachbereich für Wirtschaftsförderung und Liegenschaften
- Member of ChemCologne

Potential Business Partners

- Asahi Kasei Spandex Europe GmbH
- Ausbildungsinitiative Rheinland GmbH
- Bayer CropScience AG
- Bayer HealthCare AG
- Bayer MaterialScience AG
- Bayer Technology Services GmbH
- CURRENTA GmbH & Co. OHG
- Dralon GmbH
- Ferro Duo Chemicals GmbH
- Heraeus Kulzer GmbH & Co. KG
- INEOS ABS
- LANXESS AG
- Linde AG
- Perlon-Monofil GmbH
- Praxair GmbH
- RWE Power AG
- Saltigo GmbH
- TÜV SÜD Chemie Service GmbH
- YARA GmbH & Co.



Services/Utilities

Fully equipped "Plug & Play site"; Utilities: Steam, gases, refrigeration, compressed air, demineralised water, waste water treatment, land filling and incineration, safety and security services, permit advice, analytical services, training, and translations

R&D



Key Benefits for Investors

Fully integrated park with outstanding infrastructure, direct ship, railway and highway access, three airports nearby, strong R&D network, possibilities for cooperations

Basic Inorganic chemicals: e.g. chlorine, hydrogen, hydrogen chloride, ammonia, sodium hydroxide, carbon monoxide Basic organic chemicals: e.g. natural gas, phosgene, ethylene oxid, propylene oxide, hydrocyanic acid, isocyanates, chloroprenes Basic petrochemical materials: e.g. naphta, ehtylene, butadiene, C1-C4 fraction-polymers: Polybutadiene, polychloroprene, vinyl acetate, polyacrylonitrile, EVA

Skilled scientific personal available, CURRENTA offers full range of analytical services, laboratories for rent, strong R&D network on-site

CHEMPARK Leverkusen





CHEMPAR Europe's chemical park

Site Classification

Site Owner Bayer AG, Lanxess AG

Site Operator Currenta

Full Service (Plug & Play) Yes

Fenced/Open Site Fenced

R&D Support Yes

Key Data

Total Site Area 480 hectares (1,186 acres)

Total Free Area 25 hectares (62 acres)

Number of Permanent Staff 25,000

Number of Companies On-Site 53

www.chempark.de

Target Investors

All investors engaged in chemical synthesis, composites, environmental technologies and in addition companies in the pharmaceutical and processing industry

Partners of Site

- Wirtschaftsförderung Leverkusen
- Wirtschaftsförderung Köln
- Cologne Bonn Business
- Member of ChemCologne

Potential Business Partners

- Ausbildungsinitiative Rheinland GmbH
- AkzoNobel
- Aliseca GmbH
- Bayer AG
- Bayer HealthCare AG
- Bayer MaterialScience AG
- Bayer Technology Services GmbH
- Bayer Vital GmbH
- Blankophor GmbH & Co. KG
- CURRENTA GmbH & Co. OHG DyStar
- Fachhochschule Köln/Campus Leverkusen
- Evonik
- Degussa GmbH
- Fachhochschule f
 ür Oekonomie & Management (FOM)
- Heraeus Clevios GmbH
- INVITE
- KRONOS TITAN GmbH
- LANXESS AG
- Lerefa GmbH Momentive Performance Materials Inc.
- nkt cables
- polyMaterials AG
- Saltigo GmbH
- Syntharo Fine Chemicals GmbH
- TANATEX Deutschland GmbH
- TÜV SÜD Chemie Service GmbH

Infrastructure Fully integrated park with outstanding infrastructure, direct ship, railway and highway access, three airports nearby, strong R&D network, possibilities for cooperations

Raw Materials On-Site

hydrazine hydrate; chloromethylsilane;

Services/Utilities

training and translations

R&D



Key Benefits for Investors

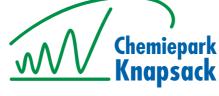
- Large number of Inorganic Basic Chemicals:
- e.g. hydrofluoric acid 100%, oleum up to 65%, nitric acid 68%,
- clorine, sodium bisulfite solution, sodium hydroxide solution,
- Organic basic chemicals and aromatic raw materials,
- e.g. propylene oxide, dichloroethane, phenol, monochlorobenzene,
- Polymers: hydrogenated nitrile rubber
- Fully equipped "Plug & Play site";
- Utilities: Steam, gases, refrigeration, compressed air, demineralised water, waste water treatment, land filling and incineration, safety and security services, permit advice, analytical services,
- Skilled scientific personal available, CURRENTA offers full
- range of analytical services, laboratories for rent,
- strong R&D network on-site tests;
- Fully equipped laboraties;
- R&D services on demand available

Chemical Industrial Park Knapsack









Site Classification

Site Owner InfraServ GmbH & Co. Knapsack KG

Site Operator InfraServ GmbH & Co. Knapsack KG

Full Service (Plug & Play) Yes

Fenced/Open Site Fenced

R&D Support Yes

Key Data

Total Site Area 180 hectares (445 acres)

Total Free Area 45 hectares (111 acres)

Number of Permanent Staff 2,200

Number of Companies On-Site 27

www.chemiepark-knapsack.de

Target Investors

- Producers of organic and inorganic chemicals
- Producers of polysilicon, paper&board, glass as well as other power intensive process industries.
- Companies requiring chlorine as a raw material.
- Polymer producers and converters e.g. polypropylene, polyethylene, polyvinylchloride
- Producers of crop protection agents
- Industrial biotech synthesis e.g. bio plastics, PLA, natural fiber reinforced plastics as well as bioenergy (biofuels, biogas)
- Applications requiring hydrogen

Partners of Site

 Member of ChemCologne e.V. regional chemical site cluster, VCI, HyCologne, St@art Hürth, CLIB 2021

Potential Business Partners

- Bayer CropScience:
- Plant protection products CABB: Producer of monochloraecetic acid and derivates
- Clariant: Special chemicals like halogen free flame retardants. runway deicer, R&D for environmental friendly flame retardants
- E-On Energy from waste: RDF power plant
- LyondellBasell Industries: Producer of polypropylene
- Nexans SuperConductors: R&D and production of materials and components based on high temperature superconductors
- Praxair Deutschland: Industrial gas producer
- Statkraft: Gas and steam power plant
- Thermphos: Produces phosphorus products (phosphorus penta sulfide), additive product for lubricants
- Vinnolit: Producer of polyvinyl chloride, hydrogen caustic soda, chlorine



Infrastructure Excellent rail and road connection, container terminal with rail loading facilities on-site, connection to european chemical pipeline network, connection to Rhine-river ports Köln Godorf and Köln Niehl

Services/Utilities

High quality energy supply (electricity and steam), industrial gases, demineralized water, cooling water, 2 waste water treatment plants on-site, analytical services, industrial maintainance, engineering & contracting, approval management, personnel recruiting, logistics, fire brigade, plant security

R&D

Around 100 chemistry or related study programs are offered at universities and professional colleges in the region. R&D operations on-site: Clariant, nova-Institut, i&f Process



Key Benefits for Investors

Raw Materials On-Site

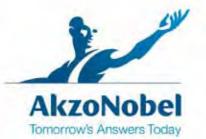
Ethylene, propylene, chlorine, caustic soda, vinyl chloride, dichlorethane, hydrogen chloride, acetic acid, phosphor, chloroacetic acid, hydrogen

Full service "Plug&Play" site;

Industriepark Niederau







Site Classification

Site Owner Akzo Nobel Chemicals GmbH

Site Operator Akzo Nobel Chemicals GmbH

Full Service (Plug & Play) No

Fenced/Open Site Fenced

R&D Support Yes

Key Data

Total Site Area 12 hectares (30 acres)

Total Free Area 1 hectar (2 acres)

Number of Permanent Staff >300

Number of Companies On-Site 11

www.akzonobel.com/de/dueren



Target Investors

The site offers clear advantages for production units that are energy- and water-intensive. Furthermore companies aiming to develop and produce new materials will find excellent conditions and many benefits here. Therefore, the Industriepark Niederau is the ideal site for specialties and niche products.

Partners of Site

Part of the AkzoNobel global group

Potential Business Partners

Akzo Nobel Chemicals: Pulp & paper chemicals and surfactants

- BIS Hima: Technical services
- Grace: Silica, sodium silicate
- Hansa Group: Anionic surfactants
- NUON Energie und Service: Supply of energy and media

R&D

on demand

IT services



Key Benefits for Investors

Infrastructure

Perfect energy supply (electricity, natural gas, water, steam), well organized waste water disposal, direct access to rail connection (on demand). Facilities for technicals services. H.P. natural gas pipeline

Raw Materials On-Site

Sulfuric acid and aluminium sulfate available, various other materials

Services/Utilities

- Full service Plug&Play site;
- Co-generation plant (natural gas) for the production and delivery
- of electricity and steam, pressurized air, cooling water,
- operational water. High level technical services (maintenance,
- engineering etc.) available on-site.
- Other services such as HSE consultancy, logistics and purchasing can be provided on request

Fully equipped laboratory space can be rented. Fully equipped laboratories

Evonik Degussa GmbH Plant Lülsdorf







Site Classification

Site Owner Evonik Degussa GmbH

Site Operator Evonik Degussa GmbH

Full Service (Plug & Play) Yes

Fenced/Open Site Fenced

R&D Support Yes

Key Data

Total Site Area 100 hectares (247 acres)

Total Free Area 50 hectares [124 acres]

Number of Permanent Staff approx. 500

Number of Companies On-Site 2

www.evonik.de

Target Investors

- Chemical producers requiring chlorine, caustic soda, caustic potasch or hydrogen as precursors
- Fine and specialty chemicals e.g. users of sodium and potasium alcoholates
- Producers of monomer and/or polymers
- Biodiesel producers

Partners of Site

- Eurochlor: Speaks for 97% of chlor-alkali producers in the EU-27 and EFTA regions
- Member of ChemCologne, part of Evonik Group

Potential Business Partners

- Air Products GmbH: Industrial gases (hydrogen)
- Evonik Degussa GmbH: Electrolysis products and

organometallic products

Raw Materials On-Site

Services/Utilities

Full "Plug & Play" site;

R&D



Key Benefits for Investors

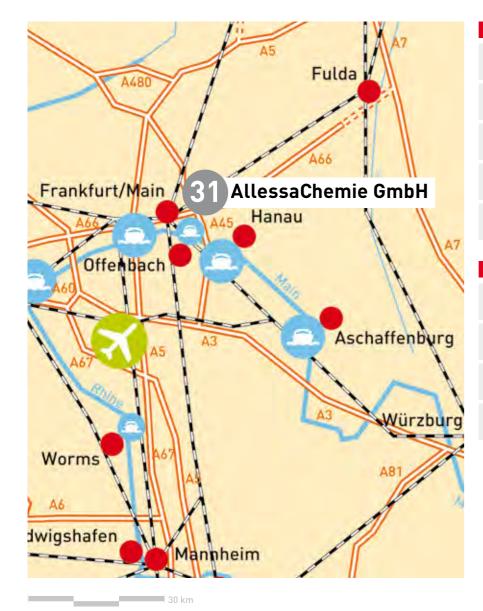
Infrastructure

- Pipelines to nearby Shell refinery;
- Location: Riverport on Rhine, 15 km from Cologne and 7 km to Autobahn; Airport "Cologne/Bonn" 10 km railway link;
- Storage space for hire: Warehouses, chemicals storage tanks;
- Waste water treatment plant, land-fill for "class 3" industial waste

- Sodium and potassium alcoholates/alkoxides, chlorine, caustic potash/potassium hydroxide, caustic soda/sodium hydroxide, hydrogen, potassium carbonate, potassium bi-carbonate, malonic esters and derivates
- Natural gas pipeline, steam (18 bar and 8 bar), cooling water (from river or wells), analytical services, maintenance services, personnel and social services
- R&D laboratory space for rent on-site, which are working in cooperation with our R&D departments

AllessaChemie GmbH Fechenheim





allessachemie

Site Classification

Site Owner AllessaChemie GmbH

Site Operator AllessaChemie GmbH

Full Service (Plug & Play) Yes

Fenced/Open Site Fenced

R&D Support Yes

Key Data

Total Site Area 43 hectares (106 acres)

Total Free Area 8 hectares (20 acres)

Number of Permanent Staff 1,000

Number of Companies On-Site

www.allessa.com

Target Investors

- Companies that can integrate into local value chain
- The site is suitable for both industrial production and research companies
- Startup companies are welcome. We support startups with our know-how, our resources and with non cash benefit
- Companies that would benefit from comprehensive analytical and R&D support provided on-site

Partners of Site

Member of VCI (German Chemical Producers Association)

Potential Business Partners

- AllessaChemie GmbH: Competent partner for fine and specialty chemicals
- BioSpring GmbH: Chemical company which produces synthetic oligonucleoticles
- Corium Service GmbH
- Geohumus International GmbH: Production and distribution of the soil additives Geohumus
- InfraServ Logistics GmbH: Offers comprehensive service package for hazardous chemicals and dangerous goods
- INEOS Melamines GmbH: Competent partners in the field of Melamine resins and addditives
- Marenis Anylytical and Process Technologies GmbH
- Prolytic: Is a GLP- and GMP certified laboratory for bioanalytics and pharmacokinetics
- TÜV SÜD Chemie Service GmbH (TCS): A global provider of plant safety-related services, authorized to certify plants

R&D Mobile reactors (up to 1 m³); Batch-/Semibatch-processes;



Key Benefits for Investors

Infrastructure

AllessaChemie operates the Frankfurt-Fechenheim site;

- New investors will benefit from the entire infrastructure and comprehensive service offerings, e.g. pilot and scale-up facilities for chemical
- syntheses from 50 kg to 1 ton;
- High flexibility through modular system;
- Own lab for process optimization;
- Extensive process safety know-how

Raw Materials On-Site

Direct access to value chain of producers; Infraserv Logistics GmbH provides a great storage plant for hazardous goods.

Services/Utilities

workshops;

IT Services:

Mechanical and electrical control and measuring engineering

- Materials logistics, analytical services;
- Safety management;
- Pollution control;
- Good working relationship with local public authorities;

H.R. and H&S management;

- Training/further education centre;
- We train your staff in line with your needs.
- Lab-scale membrane unit, active surface 50 cm²;
- Pilot-scale membrane unit, active surface 40 m²;
- Suitable for high purity operations

Industriepark Höchst



- We are particularly attractive for companies from the chemistry, specialty/fine chemicals pharma and life science sector.
- Plastics producers benefit from a broad range of raw materials such as hydrogen, chlorine and other intermediates.
- An additional focus activity is innovation/value chain integration in industrial biotech/biofuels processes.

Partners of Site

 Frankfurt Economic Development, FrankfurtRheinMain United, Hessen Agentur, VCI, GDCH, DECHEMA, Materials Valley e.V., IHK Frankfurt, Germany Trade & Invest

Potential Business Partners

- Basic Chemicals: AIR LIQUIDE, Clariant, Fluorchemie Frankfurt, Grillo-Werke, Akzo Nobel Industrial Chemicals GmbH, Kuraray Europe, LyondellBasell Industries, Solvay Fluor Thermphos, Ticona
- Greentech:
- Cargill, Heurisko, Technion Pharma/Life Sciences/Agro: Allessa Syntec, Amantec, Bayer Cropscience, Heurisko,
- New England Bio-Labs, Pfizer Manufacturing Frankfurt, Sandoz Industrial Products, Sanofi-Aventis
- Process Industries: BIS Industrieservice Mitte, BIS Prozesstechnik, HIMA, Siemens
- Specialty Chemicals: Allessa Syntec, Archimica, Cabot Nanogel, Celanese Emulsions, Clariant, Elotex, Merck KGaA, Nutrinova Nutrition Specialties & Food Ingredients, TOPAS Advanced Polymers, WeylChem Frankfurt

R&D

80 Profile of Selected Investment Sites



Key Benefits for Investors

Infrastructure

Frankfurt is a European hub for road, rail and ship and its airport is the third largest in Europe. Our on-site "tri-modal" (rail/road/barge) port provides efficient access to all of these. Almost all destinations are thereby within close reach for suppliers and customer.

Raw Materials On-Site

Pharmaceutical and agrochemical ingredients, basic and advanced polymers, detergents, pigments and additives, textile, leather and paper chemicals, enzymes, antibiotic active ingredients, sulphuric acid and textile dyes

Services/Utilities

Full service "Plug&Play" site:

Full compliance disposal for chemical, pharmaceutical and biotech waste, real estate and facility management, IT and communications, health/environment and safety, security and extensive personnel training programs

R&D services specialized for biotech. (esp. industrial biotech) life science. A wholly owned subsidary Technion provides pilot plant and upscaling services. Attractive R&D institutions in the region

Target Investors

Wolfgang Industrial Park





industrie.park

Site Classification

Site Owner **Evonik Industries**

Site Operator Industriepark Wolfgang GmbH

Full Service (Plug & Play) Yes

Fenced/Open Site Fenced

R&D Support Yes

Key Data

Total Site Area 82 hectares (203 acres)

Total Free Area 6 hectares (15 acres)*

Number of Permanent Staff 5,100

Number of Companies On-Site 15

www.industriepark-wolfgang.de

*plus 40 hectares (99 acres) adjacent site

Target Investors

- Material sciences and materials technology companies
- Specialty chemicals and fine chemical producers
- Pharmaceutical and custommanufacturing companies
- Nanotechnology and industrial biotechnology enterprises
- Automotive component suppliers and renewable energy developers
- Companies that integrate into the knowledge pool of the Rhein-Main materials technology innovation cluster

Partners of Site

- Member of the Materials Valley e.V. company network and Hessen Chemie
- Member of the Association of Enterpreneurs in Hessen and the economic initiative Frankfurt-RheinMain

Potential Business Partners

- AQura: Analytical solutions
- Cyplus: Mining Chemicals
- DeguDent: Dentistry products, precious metal alloys, precision fixtures, structure ceramics,
- implants, framework production Evonik Degussa: Feed additives, exclusive synthesis and amino acids, chemical catalysts, specialty resins for road markings, flooring and civil engineering; R&D Project Houses for functional films & surfaces; inorganic particle design, specialty metal oxides and carbon blacks, nanomaterials
- Ferro: Precious metal powders and pastes
- IPW GmbH: Full service provider on-site
- SolviCore: Fuel cell technologies
- Umicore: Precious metals products and services, automotive catalysts and technologies, precious metal chemistry and refining, platinum engineered materials, electronic materials, technical materials

public funding

R&D



Key Benefits for Investors

Infrastructure

Prime logistic connection to freeway (A3, A45, A66) and Frankfurt Int. Airport (30 min.), direct access to rail connection; Waste water treatment plant, own wells, heat/steam generation plant on-site with connection to regional high voltage power grid, training

center for over 300 apprentices;

Innovative campus atmosphere with strong R&D, applied technology and process technology network

Raw Materials On-Site

Precious metals and precious metal compounds, organic solvents for fine chemical and pharmaceutical production; Methacrylate monomers

Services/Utilities

Full service "Plug&Play" site;

Waste disposal for specialty chemicals, workshops for mechanical, electrical engineering, process control technologies, technical maintenance, analytical-technical services for pharmaceutical production, state-of-the art IT networks, client computing and local servers, ESH-services including chemicals safety and toxicology, logistics

High-tech lab, pilot plants for R&D and scale-up of processes specialized for solids & particle handling, intellectual property management & information services, innovation agency for

Industriepark Kalle-Albert Wiesbaden





InfraSerV Wiesbaden

Site Classification

Site Owner InfraServ GmbH & Co. Wiesbaden KG

Site Operator InfraServ GmbH & Co. Wiesbaden KG

Full Service (Plug & Play) **Yes**

Fenced/Open Site Fenced

R&D Support **No**

Key Data

Total Site Area **96 hectares** (237 acres)

Total Free Area **5 hectares** (12 acres)

Number of Permanent Staff 330

Number of Companies On-Site **70**

www.infraserv-wi.de



- Chemical/industrial production of materials which utilizes facilities on-site (see below)
- Production with high steam demand using heat from gas fired
- power station on-site.
 Production generating complex effluent streams which can not be treated by communal effluent plants.
- Processes using sophisticated raw materials such as ethylene oxide.

Partners of Site

Target Investors

None

Potential Business Partners

- Agfa: Printing plates
- AZ Electronics: Fine Chemicals for electronic industry
- Chemagis: Pharma active agent
- Clariant: Detergents
- Cytec: Synthetic resins for automotive applications
- Kalle: Celulose based sausage casings
- Microdyn-Nadir: Membranes for water purification
- Mitsubishi Chemicals: Biax. PP films
- Shin ETSU: Cellulose based binders

ny Trac

30 km

Key Benefits for Investors

Infrastructure

None

R&D

None

25 min to Frankfurt Airport (motorway), 3 min to motorway, rail connection on-site, river port and harbor on Rhine, power plant on-site, chilled medium (-50 deg. C - ammonia evaporator), 4 stage anaerobe/aerobe effluent plant)

Raw Materials On-Site

Services/Utilities "Plug and Play service profile": Engineering workshops

BASF Ludwigshafen







Site Classification

Site Owner BASF SE

Site Operator BASF SE

Full Service (Plug & Play) Yes

Fenced/Open Site Fenced

R&D Support Yes

Key Data

Total Site Area 1,000 hectares (2,471 acres)

Total Free Area 50 hectares [124 acres]

Number of Permanent Staff approx. 36,500 (BASF SE 32,800)

Number of Companies On-Site 25

www.sitemarketing.basf.com

Target Investors

Partners that fit into the production verbund, i.e. extend value-adding chains

Partners of Site

chem2biz: A public private partnership with focus on chemistry-based technologies. It provides a complete service for start-ups and SME's in chemistry, nanotechnology, new materials

Potential Business Partners

- Air Liquide Deutschland GmbH
- BASELL Polyolefine GmbH BASF Construction Polymers
- GmbH BASF Future Business GmbH
- BASE IT Services
- BASF SE: Main business seqments are chemicals, plastics, performance products, functional solutions, agricultural solutions and oil & gas
- BASF Venture Capital GmbH DyStar Colours Deutschland
- GmbH ELARA Pharmaceuticals Gmbh
- EPS Ethylen-Pipeline-Süd-
- Geschäftsführungs GmbH Exthrantis UG
- InstrAction GmbH
- Kombi-Terminal Ludwigshafen GmbH
- Lummus Novolen Technology GmbH
- PE PiezoElectronics Gmbh
- Specialty-Chemicals Ludwigshafen GmbH

Infrastructure

Solid bulk material;

Raw Materials On-Site

An unique variety of basic products and intermediates are available with a minimum of logistical effort. Basic raw materials are natural gas, naphta and the cracked products, rock salt, sulfur.

Services/Utilities

R&D

Access to chemical/material analytics; Application technologies



Key Benefits for Investors

- Direct access to port on the river Rhine for liquids
- (flammable, non-flammable) liquified gases;
- Direct rail and motorway access;
- Intermodal (rail/road) transport terminal;
- Logistics center for packaged sales products;
- Linked to ethylene and propylene (under constr.) pipeline;
- Combined heat and power generation on-site with connections
- to regional high voltage power grid

Complete variety of utilities required for chemical production;

- Incinerator for chemical residues;
- Waste water treatment plant;
- Expertise and infrastructure for handling and processing highly
- reactive products (e.g. hydrogen cyanide, acrylic nitril, ethylene
- oxide, chlorine, phosgene);
- Access to all other site services

Industrie Center Obernburg





ICO INDUSTRIE CENTER OBERNBUR

Site Classification

Site Owner Mainsite GmbH & Co. KG

Site Operator Mainsite GmbH & Co. KG

Full Service (Plug & Play) Yes

Fenced/Open Site Fenced

R&D Support Yes

Key Data

Total Site Area 176 hectares (435 acres)

Total Free Area 50 hectares [124 acres]

Number of Permanent Staff 3,000

Number of Companies On-Site 30

www.ico-obernburg.de

Target Investors

- Innovative production companies preferably from the following industry sectors: the chemical industry (especially synthetic fibers, industrial woven articles), polymers and medical devices.
- Innovative start up companies with ambitious expansion plans from the industries named.

Partners of Site

Bayernhafen Aschaffenburg (harbour administration and marketing cooperation)

 German and Bavarian chemical producers associations (VCI, BCV)

Potential Business Partners

- Atlantichem: Start Up for reaction technology
- Colbond Geosynthetics: Complex components for civil engineering and drainage systems
- Cordenka: Global market leader for viscose fibers for high performance tyres
- Dualogis: Logistics
- Enka: Viscose fibers for textiles
- Excorlab: Lab.-& clinical studies of extracorporal systems
- Hemmelrath: Automotive paints
- Kraftwerk Obernburg GmbH: Power/energy
- Membrana Accurel: Mikro porous polymers & additives
- Membrane Adsorption Technologies: Hightech medical adsorbers
- Polyamide High Performance: **Technical PA-fibers**
- Polyester High Performance: Technical polyester fibers
- SPES:
- Raw materials for membranes ZEWIS: Research institute

Infrastructure

Rhein-Main-Danube; Affairs;

Raw Materials On-Site None

Services/Utilities

services;

R&D

Free laboratory space; and analytical support by Mainsite. directly on-site.



Key Benefits for Investors

Proximity to international Frankfurt-Rhein-Main hub;

- Trimodal logistic connections to four lane freeways A3 and A 45; Direct rail terminal and port on the European inland waterway
- Incentives for start-ups, hotline to Bavarian Ministry of Economic

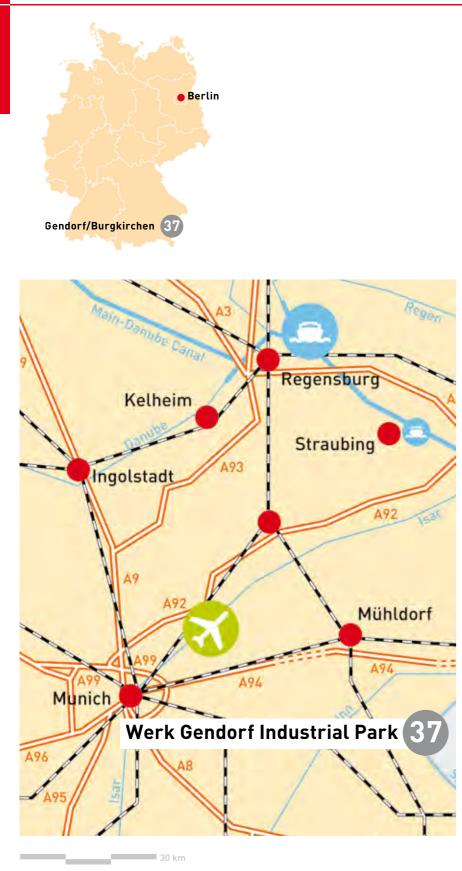
Well developed contacts to civil administration; Single plot of approx. 40ha free for new investments

Full service "Plug&Play"; In addition: Full facility management and building services, IT-support, personnel services, as well as finance & controlling

Own power plant on-site provides power, steam, heat and refrigiration

- Production oriented R&D of companies on-site; Numerous technial
- Research institute for industrial hightech research in the fields of innovative materials, automotive, intelligent systems and automation, energy efficiency, information technology and design science

Werk Gendorf Industrial Park





Site Classification

Site Owner InfraServ Gendorf

Site Operator InfraServ Gendorf

Full Service (Plug & Play) Yes

Fenced/Open Site Fenced

R&D Support Yes

Key Data

Total Site Area 197 hectares (487 acres)

Total Free Area 24 hectares (60 acres)

Number of Permanent Staff 4,000

Number of Companies On-Site 20

www.gendorf.de

Target Investors

- Companies that plan to produce chemicals
- Companies that wish to do chemical-related research
- Service providers for both above
- Companies that integrate into the established material, energy and resource network
- Furthermore companies are welcome

Partners of Site

Member of the "ChemDelta" Bavaria" (regional initiative for Bavarian chemical sites)

Potential Business Partners

- Clariant: Ethylene oxide and ethylene glycol; glycol ethers; polyglycols; ethoxylates and propoxylates; fatty nitriles and fatty amines; amine oxides and aminobetaines; methyl quats and benzyl quats; ether sulfates and olefin sulphonates; phosphoric acid esters
- Dyneon: PTFE; fluoroelastomers, fluorothermoplastics; specialty additives
- Gore: Fluoropolymers
- Klöckner Pentaplast: Broad range of rigid films for adhesive tape, decorative surfaces, pipe insulation, cards, and shrink films for the packaging industry.
- Linde AG: Liquid nitrogen (390 t/day) and liquid storage (3,000 m³ of liquid nitrogen), liquid carbon dioxide [food grade] (240 t/day) and liquid storage (1980 t of liquid carbon dioxide)
- Vinnolit: PVC, Emulsion PVC, PVC copolymers, vinyl chloride, liquid chlorine, caustic soda, hydrogen, tin tetrachloride

Key Benefits for Investors

Infrastructure Electrical energy and steam generation with an on-site power station (300 MW) fired by natural gas. A 43-MW gas turbine plant; Waste water purification with a biological treatment plant; Sewage sludge incineration plant; Land fill with license for disposal of special solid waste

Raw Materials On-Site

Ethylene (linked via ethylene pipeline to Münchsmünster and from 2011 to Ludwigshafen), rock salt from nearby guarry, chlorine, caustic soda, ethylene dichloride, tin tetrachloride, fatty acids and fatty alcohols, frigen 22 (chlorodifluoromethane), industrial gases (compressed air generation, oxygen, hydrogen, nitrogen, argon, carbon dioxide)

Services/Utilities

Full service Plug&Play site; Fully developed properties and buildings, as well as storage facilities for hire; Water supply (industrial water, demineralized water, steam generation (40 bar, 20 bar, 4 bar); Training center for 350 trainees open for the site partners, professionel development program; State-certified vocational school for technical IT-assistents

R&D

Use of facilities of InfraServ Gendorf and of R&D labs, state-of-the-art analysis facilities from Clariant, Dyneon. Access to free space in laboratories and engineering workshop



Industriepark Gersthofen





³⁰ kn

92 Profile of Selected Investment Sites

IGS ndustriepark Gersthofer Servicegesellschaft

Site Classification

Site Owner Industriepark Gersthofen Servicegesellschaft (IGS)

Site Operator Industriepark Gersthofen Servicegesellschaft (IGS)

Full Service (Plug & Play) Yes

Fenced/Open Site Fenced

R&D Support Yes

Key Data

Total Site Area 35 hectares (86 acres)

Total Free Area 3 hectares (7 acres)

Number of Permanent Staff 1,450

Number of Companies On-Site 12

www.industriepark-gersthofen.de

Target Investors

- Innovative production companies preferably aiming to produce chemicals, synthetic fibres or polymers
- Innovative start up companies with ambitious expansion plans from these industries
- Companies that can be integrated into local value chain

Partners of Site

 German and Bavarian chemical producers associations (VCI, BCV)

Potential Business Partners

- Arizona Chemical GmbH: Polymerization emulsifiers based on natural resins
- AIR LIQUIDE Deutschland GmbH: Liquid-nitrogen filling plant
- BIS TSG Industrieservice GmbH: Provider of technical services (engineering, maintenance)
- CABB GmbH: Synthesis building blocks, based on acetic acid
- Clariant Produkte (Deutschland) GmbH: Waxes and plastics additives
- Degussa Bank GmbH: Bank shop for employees
- IGS GmbH: Site operator and service provider
- INVISTA Resins & Fibers GmbH: Various polyester granulates
- Infraserv Logistics GmbH: Provider of logistics services
- LEHNKERING Chemical Transport GmbH: Provider of logistics services
- Synotexx GmbH: Analytical services

Infrastructure Waste water treatment; Security services;

Chlorine, chloroacetic acid, chromic acid, sodium hydroxide solutions, sodium hypochlorite solutions, hydrogen

Services/Utilities

Full service "Plug&Play" site; Warehouses for raw materials, technical materials and finished products, fire fighting water retaining system, social facilities (canteen, washing and shower rooms, plant doctor), workshops (metal, plastics, electrical), data networks

R&D



Key Benefits for Investors

Proximity to Munich Intl. Airport and regional airport Augsburg;

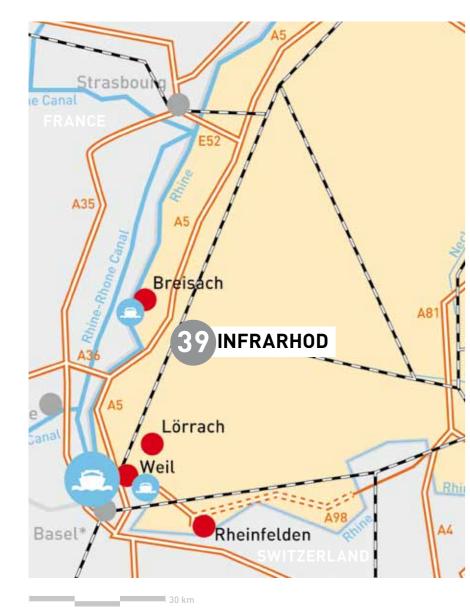
- Proximity to four lane freeways A8, direct rail connection;
- Free storage space available for hire, logistics center;
- Well developed contacts to local authorities;
- Plant fire brigade

Raw Materials On-Site

R&D is conducted by various companies on-site

INFRARHOD Freiburg







Site Classification

Site Owner **Rhodia Acetow GmbH**

Site Operator Rhodia Acetow GmbH

Full Service (Plug & Play) Yes

Fenced/Open Site Fenced

R&D Support Yes

Key Data

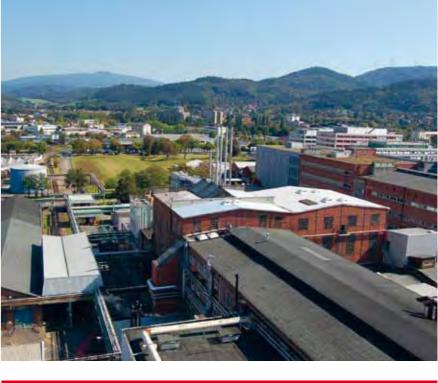
Total Site Area 53 hectares (131 acres)

Total Free Area 17 hectares (43 acres)

Number of Permanent Staff 900

Number of Companies On-Site 11

www.infrarhod.de



Target Investors

- Companies that have a large demand of energy (steam/electricity)
- Start-up companies that can utilize the benefits and infrastructure of a industrial site industry
- Well suited for companies looking to build a logistics platform

Partners of Site

None

Potential Business Partners

- Rhodia Acetow GmbH: Cigarette filters from cellulose acetate
- Rhodia GmbH:
- Nylon 6.6 Poly-merisation Rhodia Engineering Plastics GmbH: Technical polyamides
- Various service providers including TÜV - Süd: Mandated to certify safety and
- efficiency of operations

company-owned fire brigade; Certified ISO9001; Natural gas pipeline

R&D

Key Benefits for Investors

Infrastructure

Our industrial site is located in Freiburg in the South of Germany, close to the Swiss and French border. We are a true industrial area (24hrs production possible). Direct rail connection to the site. 5 km distance to the highway A5 and 500 m distance to the local airport. 5 international airports (Zürich, Basel, Stuttgart, Straßbourg and Frankfurt) within 1,5-2 hrs driving distance

Raw Materials On-Site

Acetic acid, anhydride, pulp, cellulose acetate, and acetone

Services/Utilities

- Full service "Plug&Play site";
- Technical 24hrs emergency service for maintenance and
- Highly skilled and educated chemical workers in 4 shifts;

R&D support for anhydride production and acid recovery possible

Germany Trade & Invest helps you

Germany Trade & Invest's teams of industry experts will assist you in setting up your operations in Germany. We support your project management activities from the earliest stages of your expansion strategy.

We provide you with all of the industry information you need - covering everything from key markets and related supply and application sectors to the R&D landscape.

Foreign companies profit from our rich experience in identifying the business locations which best meet their specific investment criteria.

We help turn your requirements into concrete investment site proposals; providing consulting services to ensure you make the right location decision. We coordinate site visits, meetings with potential partners, universities, and other institutes active in the industry.

Our team of consultants is at hand to provide you with the relevant background information on Germany's tax and legal system, industry regulations, and the domestic labor market.

Germany Trade & Invest's experts help you create the appropriate financial package for your investment and put you in contact with suitable financial partners.

Incentives specialists provide you with detailed information about available incentives, support you with the application process, and arrange contacts with local economic development corporations.

All of our investor-related services are treated with the utmost confidentiality and provided free of charge.

Strategy **Evaluation Decision & Investment**

Project Management Assistance

| tunity analysis and strategy support identification | management with | support of nego- |
|---|----------------------------------|---------------------------------|
| market research and contact | regional develop- ment agency | tiations with local authorities |

Location Consulting/Site Evaluation

| Identification of project-specific location factors | Cost factor analysis | Site preselection | Site visit organization | Final site decision support | |
|---|-------------------------|-------------------|----------------------------|--------------------------------|---|
| | / | / | | / | / |

Support Services

| | | | | | 1 |
|---|--|--|-----------------------------------|--|---|
| Identification of relevant tax and legal issues | Project-related financing and incen- tives consultancy | Organization of meetings with legal advisors and financial partners | Administrative affairs support | Accompanying in- centives application and establishment formalities | |

Economic development and investment agencies of the German "Länder"

Foreign and German companies are supported in their investment projects and/or their settlement in the respective federal states. Free of charge services of the different public agencies range from providing information on each state's economic structure to comprehensive business location services which include e.g. site proposals in accordance with individual requirements, information on public grant/incentive programs, regional authority management or basic information on tax and legal matters.



Schleswig-Holstein **Business Development and** Technology Transfer Corporation of Schleswig-Holstein www.wtsh.de



Hamburg HWF, Hamburg Business **Development Corporation** www.hamburg-economy.de



Bremen

WFB Bremen Economic Developmentt www.fb-bremen.de

NGl**O**bal

Lower Saxony www.nglobal.de

M INVEST

Mecklenburg-Vorpommern Invest in Mecklenburg-Vorpommern www.gfw-mv.de



ZNB

Brandenburg Economic Development Board Brandenburg Brandenburg Economic Development Board GmbH (ZAB) www.zab-brandenburg.de

Berlin

Berlin Berlin Partner www.berlin-partner.de



Saxony-Anhalt Investment and Marketing Corporation mbH (IMG) www.invest-in-sachsen-anhalt.de

WIRTSCHAFTSFÖRDERUNG Sachsen

Saxony Saxony Economic Development Corporation (WFS) www.wfs.sachsen.de

Niedersachsen Global (NGlobal)

www.nrwinvest.com



Thuringia State Development Corporation of Thuringia (LEG) www.leg-thueringen.de



HA Hessen Agentur GmbH

Hessen Hessen Agentur GmbH www.hessen-agentur.de



Investitions- und Strukturbank Rheinland-Pfalz (ISB) GmbH

Rheinland-Pfalz

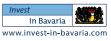
The ISB. Investitions- und Strukturbank Rheinland-Pfalz www.isb.rlp.de

Saarland gwSaar

Saarland SHS Strukturholding Saar, Saar Holding Company www.strukturholding.de

₩ bw-i Baden-Württemberg International Agency for International Economic and Scientific Cooperation

Baden-Württemberg Baden-Württemberg International Agency for International Economic and Scientific Cooperation www.bw-i.de



Bavaria Agency of the Bavarian Ministry of Economics www.invest-in-bavaria.de

VCI-Sector Group of Chemical Parks and Sites

The German Sector Group of Chemical Parks and Sites within the German Chemical Industry Association (VCI) represents the interests of around 40 chemical parks and sites in Germany. In addition, it promotes Germany as a location for chemical companies.

The VCI represents the economic interests of about 1,650 German chemical companies and German subsidiaries of foreign corporate groups to politicians, authorities, other areas of business, science and the media. The association represents more than 90 percent of the German chemical industry. It is based in Frankfurt am Main. www.chemicalparks.com



Regional initiatives – taking care of chemistry

Originating from the individual chemical companies and chemical parks, a number of regional chemical initiatives have evolved in Germany. Their concept is a simple one: companies and park operators have teamed up to create and finance regionally organised groups of professionals, who take care of the chemical industry in their region.

Most of these receive public and governmental support, thus creating true public-private partnerships. Besides their main focus on marketing the chemical parks and attracting possible investors, these initiatives also manage networks of partners and partners-to-be; foster innovation by means of contacts between companies and universities/colleges; and, last but not least, communicate and support the chemical industry's opinion to the public and to the authorities.

So far, six regional initiatives have been established: ChemCoast, CeChemNet, ChemSite, ChemCologne, Chemie-Cluster Bayern and ChemDelta Bavaria. They all help to maintain the country's unique position as the world's premier chemical producing location.

ChemCoast

ChemCoast www.chemcoast.de

CechemNet Central European Chemical Network CechemNet www.cechemnet.de



CHemcologne

ChemCologne www.chemcologne.de



ChemDelta Bavaria ChemDelta Bavaria www.chemdelta-bavaria.de

AHK – The German Chamber Network: Service providers for companies

The Network of German Chambers of Commerce (AHKs) is present in all places of major importance to German industry and commerce - in over 80 countries and 120 locations on all five continents. AHKs offer consulting services including market entry assistance, business partner search, trade fair services and legal advice as well as access to a global business network.

The German Chamber Network cooperates closely with the globally located industry experts from *Germany Trade & Invest*. This partnership enables German exporters and potential foreign investors alike to benefit from a single point of contact overseas; providing client-specific market and industry information as well as targeted consulting services provided under one roof.

www.ahk.de/en



German Chambers of Commerc Worldwide Network

98 Profile of Selected Investment Sites



National Border

O City-State

(Federal) State Borders

Selected Sites

Steam Cracker

Ethylene Terminal

Propylene Pipeline

Ethylene Pipeline

____ Product Pipeline

GERMANY

www.gtai.com invest@gtai.com

Major Crude Oil Pipeline

TRADE & INVEST

Refinery + Steam Cracker

Refinery

8

*

 \otimes

.....

🔴 (Federal) State Capital

Publisher

Germany Trade and Invest Gesellschaft für Außenwirtschaft und Standortmarketing mbH

Friedrichstraße 60

10117 Berlin Germany T. +49 (0)30 200 099-0 F. +49 (0)30 200 099-111 invest@gtai.com www.gtai.com

Chief Executives

Michael Pfeiffer, Dr. Jürgen Friedrich

Text

Rolf Gohdes, Germany Trade & Invest Dr. Josef Auer, John Baker, Franz Willi Iven, Helmut Weihers, Ute Witt

Layout & Cartography

Typoly, www.typoly.de

Print

CDS Chudeck-Druck-Service, Bornheim-Sechtem

Special Thanks to

NRW Invest IMG Sachsen-Anhalt The German Sector Group of Chemical Parks and Sites within the German Chemical Industry Association (VCI) German chemical regions Chemical parks and sites in Germany

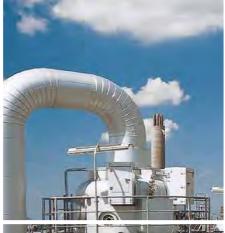
Support

Promoted by the Federal Ministry of Economics and Technology and the Federal Government Commissioner for the New Federal States in accordance with a German Parliament resolution.

Notes

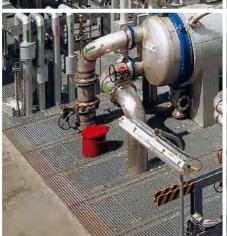
© Germany Trade & Invest, January 2011 All data provided is based on the most current information available at the time of publication. Germany Trade & Invest accepts no liability for the actuality, accuracy, or completeness of the information provided.

Order Number: 14237





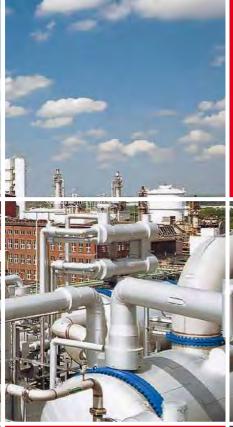






Germany Trade & Invest

Friedrichstraße 60 10117 Berlin Germany T. +49(0)30200099-0 F. +49(0)30200099-111 invest@gtai.com www.gtai.com/chemicals



About Us

Germany Trade & Invest is the foreign trade and inward investment agency of the Federal Republic of Germany. The organization advises and supports foreign companies seeking to expand into the German market, and assists companies established in Germany looking to enter foreign markets.

All inquiries relating to Germany as a business location are treated confidentially. All investment services and related publications are free of charge.