



Exporting to **GERMANY**

—
A guide for clients



Going Global



#GlobalAmbition

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Berlin

Capital



83.7m¹

Population
(31/12/2021)



€42,918²

GDP per capita
2021



€1.446bn³

Enterprise Ireland Client
Exports (2021)



Why Export to Germany

Germany is Europe's largest economy and the fourth largest in the world, with a population of 83 million, some 17 times larger than Ireland. Despite pressures from the coronavirus pandemic and energy crisis, the German economy in 2022 is still expected to grow between 1% -2%.

Growth has been driven by the gradual reopening up of the economy once again along with the substantial investment from the German government, as part of a national recovery plan, to make Germany more greener, more digital and more resilient. Germany is accustomed to international trade, as befits the world's 3rd largest exporting nation. Indeed, German exports amounted to €1,375 billion in 2021 and the country maintained its foreign trade surplus during this difficult year. Once embedded in the German supply chain, companies can benefit and grow on the back of this reach across the globe. Germany also stands for quality and reliability internationally so being successful in Germany will immediately open up other markets and enhance your own reputation as a business. Germans have long had an affinity for Ireland and there is a strong cultural interest in Irish literature and music, as evidenced by the fact that Germany is the 3rd most important holiday market to Ireland, and the most important one on mainland Europe.

Many Enterprise Ireland client companies are selling into Germany, so why aren't you?



Germany is a leading industrial nation in automotive, life sciences, agritech, software and engineering services.



1st in Europe for dairy production.⁴



Europe's largest semiconductor industry.⁵



Europe's largest construction industry in the EU 2020.⁶



The largest financial services sector in the Eurozone.⁷



3rd largest online retail market in Europe.⁸



Third largest Medtech market in the world and accounts for 40% of the EU medical device market.⁹



Leads the way in renewable energy, with 40-45% of its energy consumption coming from renewable sources by 2025¹⁰



Why Export to Germany

(continued)

Germany is also the 2nd largest source of Foreign Direct Investment in Ireland, after the US, with 96 German companies – including SAP, Deutsche Bank, Allianz and Liebherr - employing more than 14,000 people in Ireland in 2021.

Those links work both ways too, with Irish owned foreign affiliates in Germany employing over 30,000 people in their operations in Germany, according to the Central Statistics office, including large employers such as CRH, Smurfit Kappa, ICON and Glen Dimplex. Enterprise Ireland's mission is to help Irish exporters to even greater success there. Enterprise Ireland client company exports from Ireland to Germany in 2021 totalled €1.44 billion. There has never been a better time to focus on the giant opportunity that is the German market.

Sectoral Successes



€29 billion
- German/Irish
bilateral trade.



€21.1bn services
exports to Germany
in 2018.¹²



5th largest market for
food and drink exports
in 2018, with total
exports for the year at
€730 million.¹³



2nd largest source of
foreign direct
investment in Ireland.¹⁴

Key Growth Opportunities in Germany

Successfully selling into the German market earns you credibility internationally. Apart from being a large market in its own right, Germany is a gateway to many other international markets, by virtue of German companies' strong exporting culture – the country is the world's third largest exporter.

Having German reference customers and/or German certification for your products helps build international credibility and enables you to win business in other markets.

Entering the supply chain of an export-orientated German company can open international opportunities too. Irish companies that have successfully worked with German multinationals and been accepted into their supply chains have often found that this can be leveraged to enter their German customers' international supply chain.

So, as a strategy to internationalise your business, gaining a foothold in Germany can be an extremely useful first step to selling your product or service around the world.



Life Sciences

Germany offers the largest market for healthcare and life sciences products within Europe, driven by the necessity to adapt to global trends such as the demographic change or technological developments as digitization.

Valued at more than €46.4 billion in 2019¹⁵, the German pharmaceutical market is the largest in Europe and the fourth largest in the world. Germany hold the same title in the medical technology sector. The German market, comprised mainly of small and medium companies continued to grow in 2018 with sales rising 4.2% compared to the previous year. Medical device manufacturers employ around 140,000 people in Germany, in 1,300 companies with more than 20 employees each. In addition, there are more than 11,000 micro-enterprises with a further 60,000 employees. In total, the MedTech industry in Germany employs over 200,000 people¹⁶.

The industry is well connected between private sector companies, hospitals and academia and home to more than 30 specialised cluster networks focusing on medical technology. One of the largest clusters in Europe is the region of Tuttlingen in the south-west of Germany with more than 400 Medtech companies.



Consumer Retail Markets

With a population of 83 million¹⁷, Germany is Europe's largest consumer market. Germany is also the second largest e-commerce market in Europe with value growth of 14.6 % to reach sales of €83.3 billion in 2020. The value share of e-commerce in retailing will continue to grow, with sales expected to increasingly shift from store-based and PC-based to mobile purchases. German consumers value familiarity and are much more likely to purchase from a recognised webshop rather than an international shop. The key points of successful e-commerce deals with German clients are rules, efficiency and punctuality.

The German population is affluent and current trends point to continued development and growth. German consumers are increasingly following individualistic value-for-money concepts. The typical German consumer is as equally receptive to discount retailers as to established brand names across different product segments.

A strong trend in the German consumer goods market is the trend to "go green". Consumers in Germany have become increasingly environmentally conscious in recent decades, and companies able to manufacture sustainable and environmentally friendly products find themselves at a significant competitive advantage.¹⁸

Key Growth Opportunities in Germany

(continued)



Electronics

The German market for electrical and electronic products is Europe's largest and the fifth largest worldwide.

26% of all patent applications in Germany are made by the Electronics (13,500 patent applications per year) and the industry shows 45% added value over production: the highest rate among all big industry branches in Germany. Major sub-sectors are microelectronic components to electrical household appliances, automation systems, electronic medical equipment, and automotive electronics. This industry accounts for 10% of total German industrial output and about 3% of gross domestic product (GDP). R&D is also a major focus within the sector, with €19.7 billion invested in 2021.¹⁹



Internet of Things (IoT)

The Internet of Things (IoT) in Germany is of strategic relevance, transforming Germany's high-tech industry by developing the automotive and lightweight sector, ICT and Software, Machinery and Equipment, Microelectronics and many others. IoT is expected to affect all vertical European markets but markets that have traditionally invested more in IT are the front runners.

The majority of Germany's IoT spending is in enterprise and industrial IoT, with the automotive and manufacturing sectors leading the country's IoT adoption rate.

The IoT solution market in Germany is strongly driven by mid-market companies. There are a variety of electronic components that enable technologies for IoT. Key components are field bus systems, sensors, semiconductors, cabling for data and information channelling, as well as electrical motors as actuators. Germany IoT market is expected to witness a significant growth with the CAGR of approximately 21%²⁰.



Automotive

Germany is by far Europe's leading automotive industry – with 16 million automobiles produced in 2019²¹. With a turnover of €435 billion, it contributes around 24% to the total German industry revenue. 60% of the R&D growth in Europe is created by the German automotive industry, and globally the country is responsible for around 1/3 of the automotive R&D spending²². The country is one of the strongest locations worldwide for high-tech automotive products, including autonomous driving and connected cars²³.



Agritech

EY Hannover reported that according to the German Agricultural Machinery Association within the German Engineering Federation (Verband Deutscher Maschinen- und Anlagenbau e.V. - VDMA), turnover in 2020 remained steady at €8.6 billion, slightly increasing from €8.5 billion in 2019. Expectations for 2021 have so far been rather cautious. The German agricultural machinery industry's share of global agricultural machinery sales in 2018 was 8.0%. Despite tenuous agricultural policies and the Corona crisis, the willingness of German farmers to invest was high at the beginning of 2020, at 17%. This was likely driven by environmental and climate policy challenges.²⁴

Dr Christian Janze, Partner at EY: "In the face of the extraordinary strains in 2020, the agribusiness has proven to be extraordinarily robust. Especially during the crisis, the fundamental importance of the sector for food and supply security in Germany is evident. With a view to the business climate and business expectations, the sector is clearly more optimistic on average than other sectors. And so agribusiness can look forward to 2021 with cautious optimism. However, challenges remain that could have a negative impact on the further course of business: For example, African swine fever hangs like a sword of Damocles over the meat industry and caused exports, which are so important, to collapse in 2020.

Key Growth Opportunities in Germany

(continued)

Access to the important British market has been restricted in 2020 both by measures taken in the wake of the Corona pandemic and by the impending Brexit. It remains to be seen whether the now negotiated agreement will increase exports again in 2021. For the meat industry as a sub-sector of agribusiness, the crucial question is whether production chains can be maintained in the future. Online food trade has not yet heralded a turnaround and has not yet made it beyond a niche existence in Germany. The poor mood in the local agricultural sector is also noticeable in the agricultural machinery industry, which has to look to future markets abroad even more than in the past.²⁵



**Cleantech
/Greentech**

Environmental technology and resource efficiency are driving sustainable development around the globe. For Germany's technological and industrial base, too, it is impossible to overstate the importance of green technologies.

In 2020, these technologies accounted for 15% of the country's GDP - with an upward trend also in employment and turnover growth. 1.5 million people already earned their living in this discipline in 2016.

([Original guide source](#)) and management consultancy Roland Berger predicts that, between now and 2025, those employed in the green technology industry will grow by an average of 6.8% per annum. German GreenTech companies expect an average annual turnover growth of 9.9 percent by 2025 – considerably faster than the international market. In 2020, the market volume of German environmental technology and resource efficiency stood at €392 billion euros. While dynamic development is expected on the international Greentech markets, the sub-sectors for environmental technology and resource efficiency will also expand in Germany itself. By 2030, the total market volume of all sub-sectors will more than double to 856 billion euros, an average annual growth rate of 8.1 percent. Energy efficiency continues to be the largest sub-sector (117 billion euros), with sustainable mobility in second place (91 billion euros)²⁶.



Mechanical and Plant Engineering

Germany produced machinery and equipment worth 201 billion euros in 2020, making it one of the largest machinery producers in the world. The strongly export-oriented key industry supplied machinery worth around 160 billion euros to the rest of the world²⁷.

VDMA Chief Economist Dr Ralph Wiechers reports that in 2020, production in the mechanical and plant engineering sector fell by 12.1 %, according to preliminary calculations. For the current year 2021, the VDMA continues to expect steady production growth of 4 %. In view of last year's decline, this is "the beginning of a catch-up phase from a low level", Wiechers noted.²⁸ Throughout the crisis, staffing remained steady, which has helped sustain reliable growth in 2021. The more 6,600 companies employed over 1.4 million people. Of the nearly 200,000 engineers, about half are employed in research, development, and design²⁹.



Construction in Germany

After the UK Germany is the country with the largest construction sector in Europe. Germany accounts for 13.9 per cent of the European construction industry with a market value of 336.3 billion EUR in 2019. After a COVID-19 related slump in 2020, the industry is expected to grow by 2.5 per cent on average annually until 2024. A decentralized residential construction market makes it difficult to enter for non-domestic companies to enter, and the main opportunities for Irish businesses lie in the non-residential market which accounts for 51.3 per cent of the industry's value.

Key Growth Opportunities in Germany

(continued)

General trends in the construction industry are the reduction of the carbon footprint, modular building, and construction technology. As part of the European Unions green deal, the renovation of the existing building stock will become a major opportunity in the following years.

In recent years, Irish contractors have established a strong reputation in the construction of data centres and pharmaceutical plants in Germany. This reputation also holds great potential for smaller subcontractors and suppliers, of which many successfully entered the market already. This reputation could be transferred to the two growth markets battery and semiconductor manufacturing as both industries move closer to German OEMs.

Irish companies are successfully tendering for construction and project management projects in Singapore, Russia, India, Netherlands, UK, France, Africa and China, all through partnering with German companies such as Voith, Siemens, M&W, Uhde and ABB.

Germany is the second largest market for data centres in Europe, offering opportunities for Irish construction and engineering companies to win building projects in Germany.

Germany controls 14% of the global market for construction and material handling equipment. Irish companies are successfully targeting this sector, worth an estimated €15.8 billion.



Fintech

Germany is an important Fintech market in Europe and the fourth largest in the world. While digital technologies continue to advance, Germany's traditional banks are facing a two-pronged challenge: transformation and disruption. The response of financial institutions to this challenge is to partner, cooperate or partner with FinTechs to develop/or apply new technologies, launch innovative products/services or cooperate with Fintechs to use their products. (Source: EY Germany Fintech)

Irish technology providers have proven successful introducing technologies in the areas of payments, compliance and 'know your customer' (KYC) and are respected for their deep expertise on a global scale particularly in areas such as Regtech.



Information and Communications Technology (ICT)

Germany is home to the single largest software market in Europe - accounting for around a quarter of the European market by value³⁰.

Germany recorded ICT market turnover of €169.8 billion in 2020³¹. The German market for IT, telecommunications and consumer electronics is expected to grow by 2.7 percent to 174.4 billion euros by the end of 2021³².

Already 1.2 million people are employed in the industry, a number that is expected to grow by a further 20,000 by the end of the year³³. Innovation comes as standard in an industry best characterized by a thriving Mittelstand of small and medium-sized enterprises³⁴. The country accounts for approximately a quarter of the European software market by value, with the UK and France in distant second and third places (21.6% and 12.1% respectively)³⁵.

There is a noted increased in demand for solutions in cybersecurity. As the Association of German Engineers (VDI) has noted, high-profile virus attacks provide just a flavour of the gravity of the damage potential to IT infrastructures when hacked. With 73 million people (88% of the German population)³⁶ online on a regular basis, Germany is responsible for around one quarter of all European B2C e-commerce turnover. Combined with an extensive, highly developed logistics infrastructure, Germany is the clear continental leader in this area and offers a myriad of opportunities for Irish technology providers in AdTech, data analytics and Artificial Intelligence³⁷.

Get Ready to Do Business in Germany

Germany is a mature market with well-entrenched domestic and international suppliers, so you will need to research the market thoroughly to identify a niche. You will also need to assess competitors, both local and international.

Within the German marketplace, long-term business partnerships are highly sought after. However, German companies are continuously seeking innovative solutions and products to gain a competitive advantage. Innovation is a key driver for change amongst German businesses.

Germans will make allowances for the Ausländer (foreigners) but beware of the assumption that everyone in Germany speaks good English. Many business people do indeed have a good grasp of the language but may not wish to or feel comfortable negotiating a deal or talking through a problem in English.

To be most effective, your sales teams will need to be fluent German speakers and all of your sales, marketing and promotional literature should be translated into German. When it comes to discussing technical details, Germans are far more comfortable doing so in their own language.

Additionally, it is imperative for Irish companies do deliver on-time and on budget in the German marketplace. Always aim to over deliver rather than under.



Achtung!

Germany is a market with exceptionally high customer expectations of quality and service delivery. The more you can do to prove you are committed to the market over the long-term, the more likely Germans will be to trust your company.

As a mature market, you'll need highly differentiated products. Expect differences in taste, customs and practice within its various states.

Contracts in Germany go into great detail. Equally, detailed documents and product specifications are highly valued. Lastly, German industry is frequently subject to sector-specific regulations, standards and norms. Research these properly before entering the market. German organisations often require a higher standard than EU or international norms.



Getting to grips with the language

Alles in Ordnung is often translated as 'that's fine' but a more accurate reading is 'everything in order' a desire for clarity, method and procedure. Germans will be won over by rational arguments that appeal to logic.

Verlässlichkeit, or reliability, is key. German business culture is risk averse. It is not an early adopter market. Your product or service should be proven in other markets and with other customers. Any claims you make around the superiority of your offering must be backed up.

Pünktlichkeit, or punctuality, is considered highly important and being late is unacceptable.

PreisLeistungsverhältnis means value for money. Germans have a reputation for being price-sensitive but in a business context, it includes expectations for quality, certification and after-sales support.

Get Ready to Do Business in Germany

(continued)



MAKE A SHOW OF YOURSELF

Germany is the world's number one venue for trade shows - a primary form of B2B communications. There are close to 150 trade fairs there every year, approximately two-thirds of the global total.

Frequent attendance at important trade shows in your sector over a 12-18 month period is advised – Germans will want to see that you are serious about the market.

Trade show stands are a good place to play the Irish card with Irish-themed hospitality which can be effective in Germany.



Geography

Germany has a highly decentralised structure and is divided into 16 Länder or Federal States. From a business perspective, it has no centralised capital equivalent to a Paris or London. There are, however, sectoral strongholds, such as Frankfurt for banking and finance and Düsseldorf for fashion. Many of Germany's leading car manufacturers are based close to Stuttgart and Munich. The capital, Berlin, is the centre of Government and houses many technology start-ups. It's a good testing ground for consumer goods too, thanks to its population of 3.8 million people.



Get Ready to Do Business in Germany

(continued)



Get the memo on meetings

- Speculative meetings are not encouraged
- If you get a meeting with a German prospect, chances are they are interested
- Meetings begin and end on time, and follow an agenda
- Negotiating style is cooperative, aimed at an outcome satisfactory to both parties
- Little meeting time is given over to small talk, get to the point quickly using direct, clear, logical language
- Back up your claims
- Germans are generally forthright and expect the same from a potential supplier. It's perfectly acceptable to ask your prospect who will be attending, and what outcome your host expects from the meeting
- Buying decisions are reached collaboratively among several layers of staff and management in medium and large German organisations; expect longer lead times for sales and don't try to circumvent this by going to the top, it won't work.

ROUTES TO MARKET



Commercial agents:

Working with a commercial agent or distributor can reduce the risks for an Irish company by providing a presence on the ground.

Distributors:

As the market in Germany is mature, your product is likely to be one of several similar offerings and a nationwide, broad-based distributor will need a major incentive to promote yours over that of an indigenous or incumbent rival. Consequently, the largest distributor isn't necessarily the most suitable for your product - smaller niche players may be the way to go.

Selling online:

Germany's online market is very highly developed and could prove to be a useful channel. Be aware - German sites don't always accept credit cards. Ensure your site is equipped for alternative payment forms.



Things to Consider

“Entering any new export market is a big strategic decision. The most important consideration is the market opportunity for your particular product or service - the size of the market, the scale of the opportunity and its fit with your offering,” says Manus Rooney, Enterprise Ireland Manager for Germany.

Given its size, stability and geographical proximity, Germany makes a compelling option.

“Germany is the 4th largest economy in the world and for Enterprise Ireland clients with a vision to be a world or European leader in their niche they must be successful in Germany,” says Rooney.

“Germany has become the powerhouse of the EU and is becoming increasingly more influential on the world stage. Its increasing political and economic strength and stability should prove to be a considerable incentive for Irish companies thinking of exporting to a new market,” he says.

“There is no currency risk and it offers ease of access via several main city airports, with direct flights to Dusseldorf, Berlin, Frankfurt, Cologne, Hamburg, Munich, Stuttgart as well as local airports like Hahn and Weeze. German culture is very accessible for Irish clients and entering the supply chain of an export-orientated German company can open up further international opportunities, as Germany is the third largest exporter in the world.”

But in a mature market like Germany, standing out from the competition is key. “Know where your company stands in relation to your competitors and be clear about what your advantage is,” Rooney says.

Before you go....



Market landscape

What is the size of your target market? Is it dominated by a few strong players or fragmented with many small competitors?



Market trends

What are the current market trends for the sectors you will be targeting? If there is an obvious gap in the market, find out why: it may exist for a reason.



Target market

How does your target market make buying decisions? Who are the relevant decision-makers – what are their job title and responsibilities?



Market segmentation

Who are your most probable customers, where they are located, how and what else do they currently buy, who are their influencers and what “need” are you fulfilling?



Market competition

Who are your rivals in the market and how do their offerings compare with and differ from yours? It is common that when Irish companies start researching the German market they discover competitors they never knew they had.



Market research resources

Being abreast of local market trends, especially in your sector, will help enormously when it comes to building your knowledge about the German market.

Enterprise Ireland’s Market Research Centre offers client companies access to market intelligence in the form of company, sector, market, and country information to explore opportunities and compete in international markets.

Helping You Win in Germany

After you get there....

As a first-time entrant to the German market, your brand may be totally unknown. To build market presence as efficiently as possible, take an integrated approach to marketing including:

Hard copy

Corporate marketing materials are an important way of establishing your credentials and are useful sales tool at trade fairs. They must be translated into German and should include an overview of your product or service, contact details and, if possible, a significant customer endorsement.

Company website

Your company website must be updated to accommodate international enquiries and sales, as well as being an online brochure. Have a German language landing page with news relevant to the German market and localised functionality, such as the inclusion of an impressum, or imprint.

For any business marketing to Germany this is a mandatory page accessible from the front page of your website which provides your company details. Where possible, set up a .de domain, and use localised search engine optimisation and search engine marketing techniques.

Social Media

Social Media is a good way of building up a network in Germany. Get active on LinkedIn and for some sectors like Consumer, the German alternative XING (www.xing.com) is the preferred choice.



Helping you succeed in Germany

Enterprise Ireland assists clients entering new markets with

Pre Visit Support

- Sector overview
- Validation of the opportunity for your product or service
- Evaluation of your market entry strategy
- Suggested channels to market
- Competitor analysis
- Relevant contacts/suggested itinerary

In-market support

- Introductions to buyers and decision makers
- Identification of potential partners
- Facilitating buyer visits to Ireland
- Assistance with product launches and workshops
- Securing reference sites
- International trade events
- Inward buyers' missions to Ireland
- Group stands at international trade fairs
- Overseas trade missions
- Market study visits
- Client knowledge seminars
- Networking events with market contacts

Additional supports

- Access to translation and interpreting services
- Introductions to specialists in all areas, including legal, recruitment, PR and taxation
- Access to mentors

Enterprise Ireland has also built up an excellent network of individuals in Germany who are available to work with Irish client companies looking to develop their business. It includes market and sector specialists, business accelerators and members of Irish business associations.



Legal & Taxation Information



Visa requirements

There is no working visa requirement for EU citizens in Germany.

For non-EU citizens, see:

<https://www.gtai.de/gtai-en/invest/investment-guide/who-needs-a-visa--558348#toc-anchor--2>



Customs information

As a fellow member of the EU, Ireland enjoys barrier free trade with Germany.



Corporate structures, intellectual properties, contractual terms & conditions, employment

Any entrepreneur who wishes to start a business in Germany may do so. There are generally no restrictions limiting the establishment of new companies. However, choosing the correct legal form and registering with the correct associations is a must and you should seek specific legal advice on this topic.

Enterprise Ireland can help connect you with trusted legal practitioners in the market, see:

<https://www.gtai.de/gtai-en/invest/investment-guide/company-setup-630302>



Tax structures

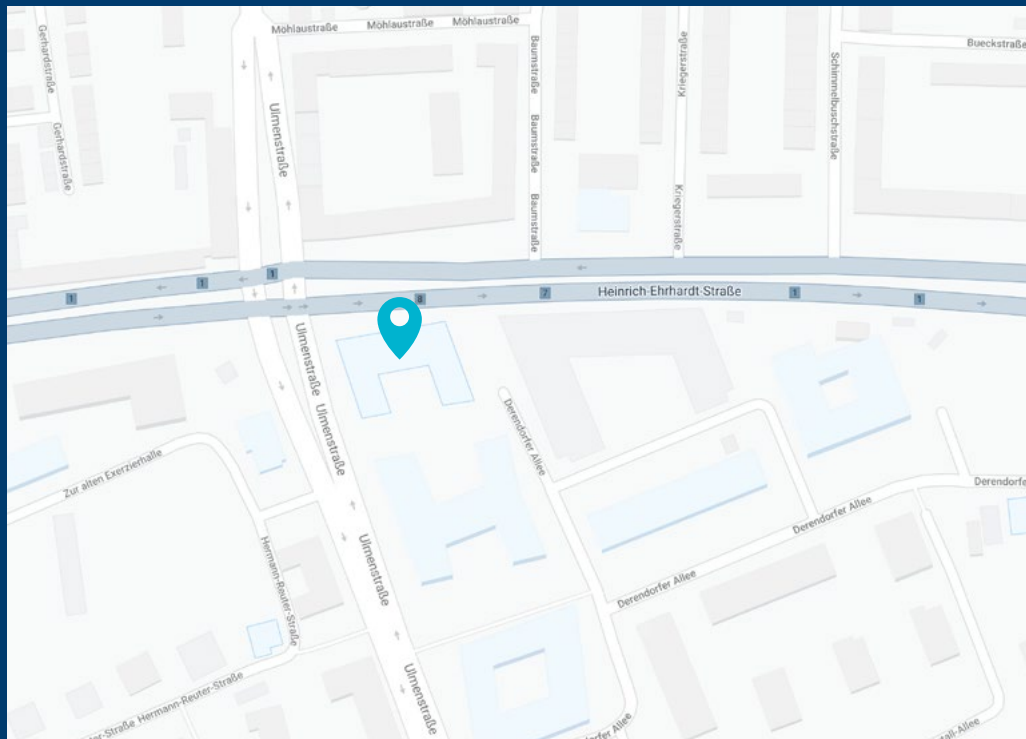
Due to the locally varying trade tax, Germany has a very competitive tax system. The average overall tax burden for corporate companies amounts to 29.83%.

To understand the German tax system, it is important to note that there is no consistent nationwide corporate tax burden. Instead, the overall tax burden for corporate companies can differ from municipality to municipality. The abovementioned overall tax burden rate of 29.83% is an average amount. Significantly lower tax rates are available in certain German municipalities – up to 8% less.

For more information, see:

<https://www.gtai.de/gtai-en/invest/investment-guide/corporate-taxation-558404>

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Riadas na hÉireann
Government of Ireland



**Ireland's EU Structural and
Investment Funds Programmes
2014 - 2020**

Co-funded by the Irish Government
and the European Union



European Union
**European Regional
Development Fund**

Ireland's European Structural and Investment Funds Programmes 2014-2021.
Co-funded by the Irish Government and the European Union.

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