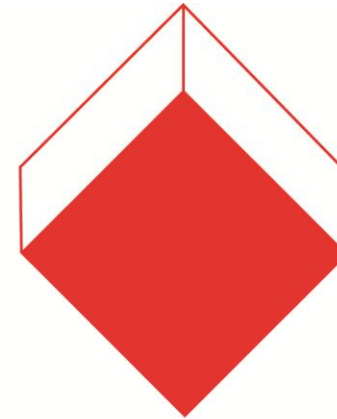


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Intralogistics – Branch

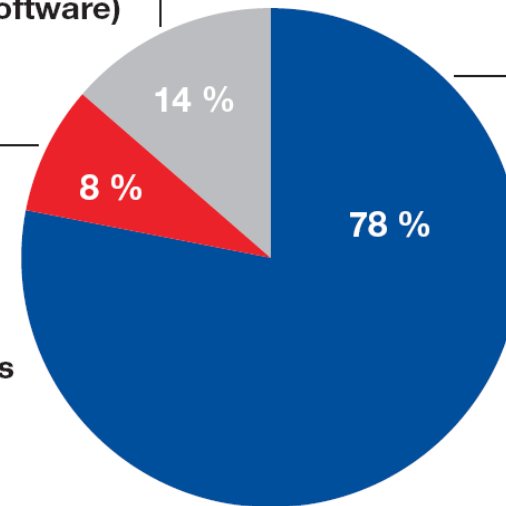
Interdisciplinary interaction of suppliers

- ◆ Storage systems (storage and retrieval machines)
- ◆ Cranes and lifting equipment
- ◆ Industrial trucks
- ◆ Continuous handling conveyors (unit load/bulk)
- ◆ Robotics
- ◆ Sorting and picking technologies
- ◆ Palletizing & packaging technologies
- ◆ Identification and machine vision technologies / systems
- ◆ Actuating and sensor systems
- ◆ Telematics
- ◆ Logistic software
- ◆ Control and automation technologies
- ◆ Systems suppliers and integrators
- ◆ Storing facilities / components
- ◆ ...

Intralogistics – Sub-industries Volume of sales in Germany 2009

Logistic software and electric automation (incl. machinery software)
2,2 Bn. €

Operating facilities and components
1,3 Bn. €



Materials Handling technology (without machinery software)
12,5 Bn. €

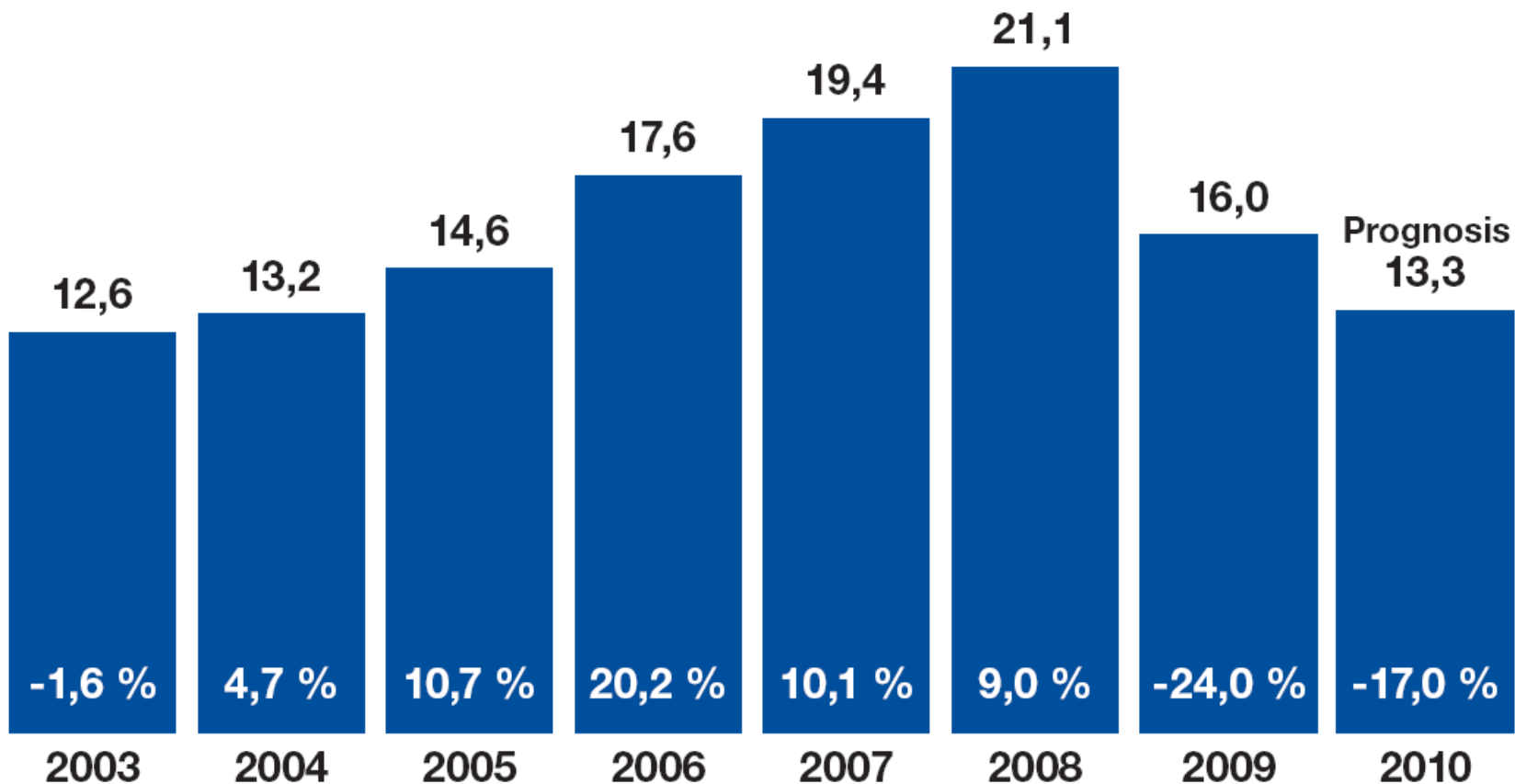
Intralogistics German turnover
Σ 2009 = 16,0 Bn. €
(100 %)

Source: VDMA

Intralogistics – History of German turnover

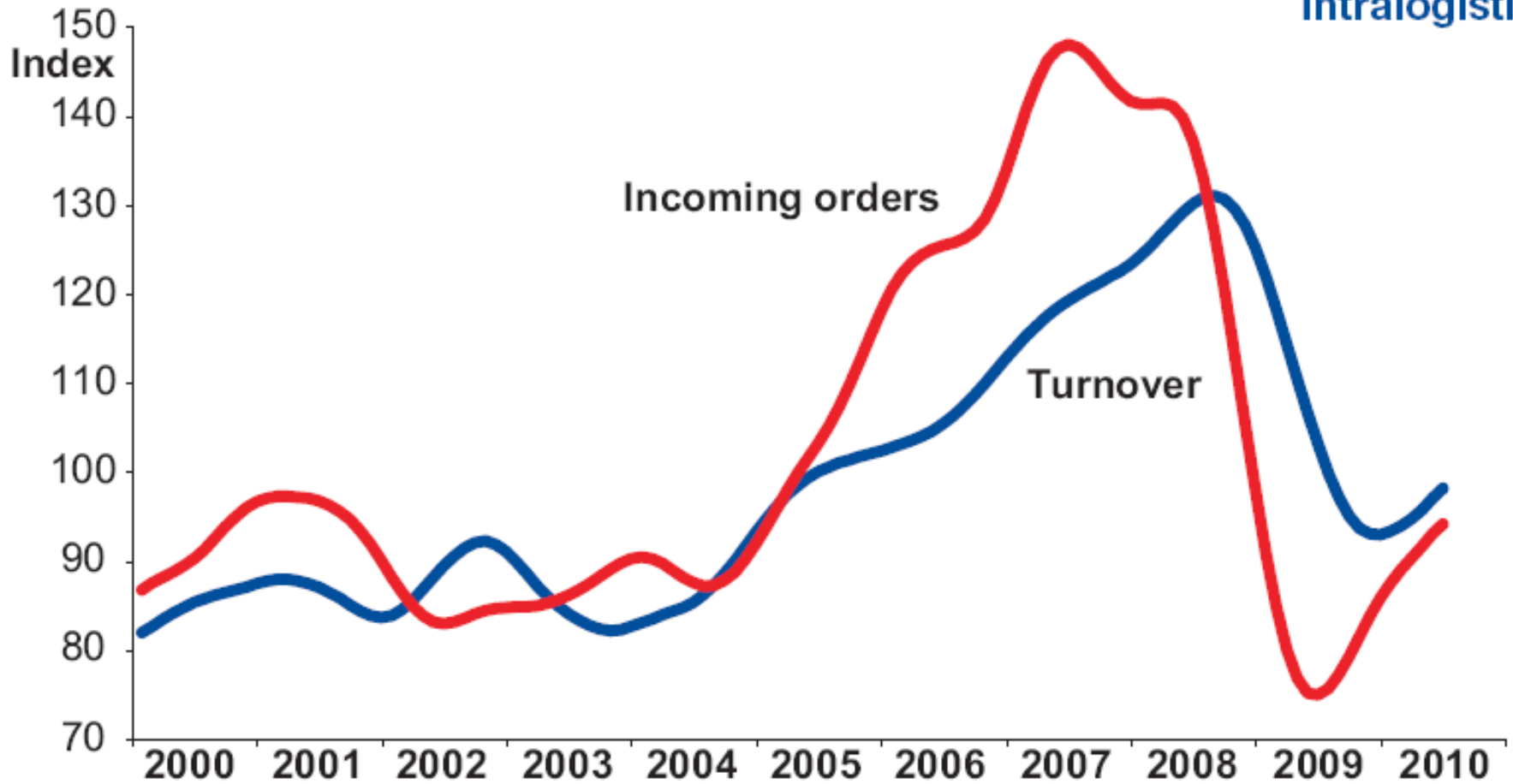
All values in Bn. €

Intralogistics



Source: Eurostat, National Statistical Office, VDMA

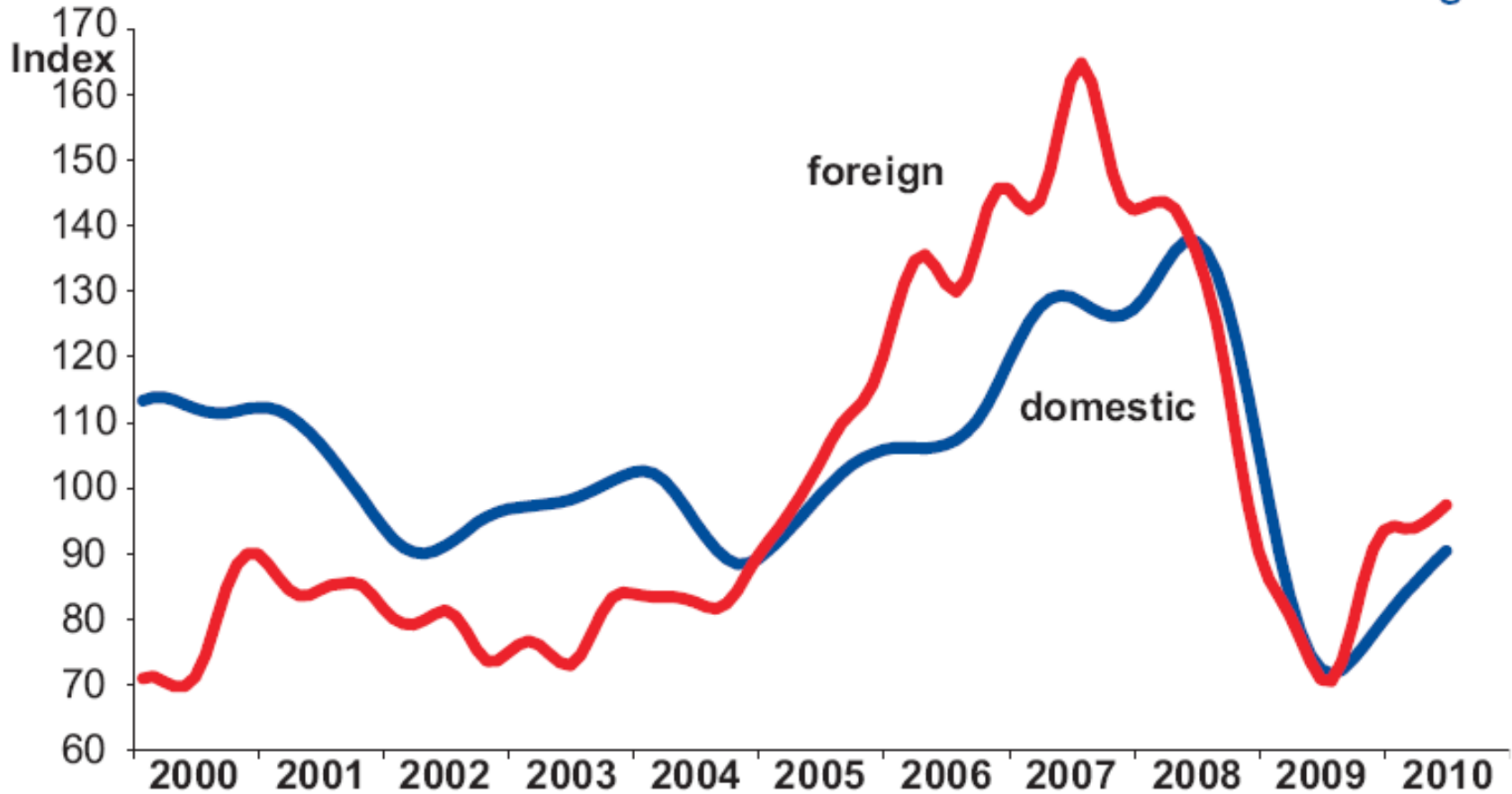
Incoming orders and turnover



Source: VDMA, Volume, seasonally adjusted – Index 2005 = 100

Incoming orders – Domestic and foreign

Intralogistics



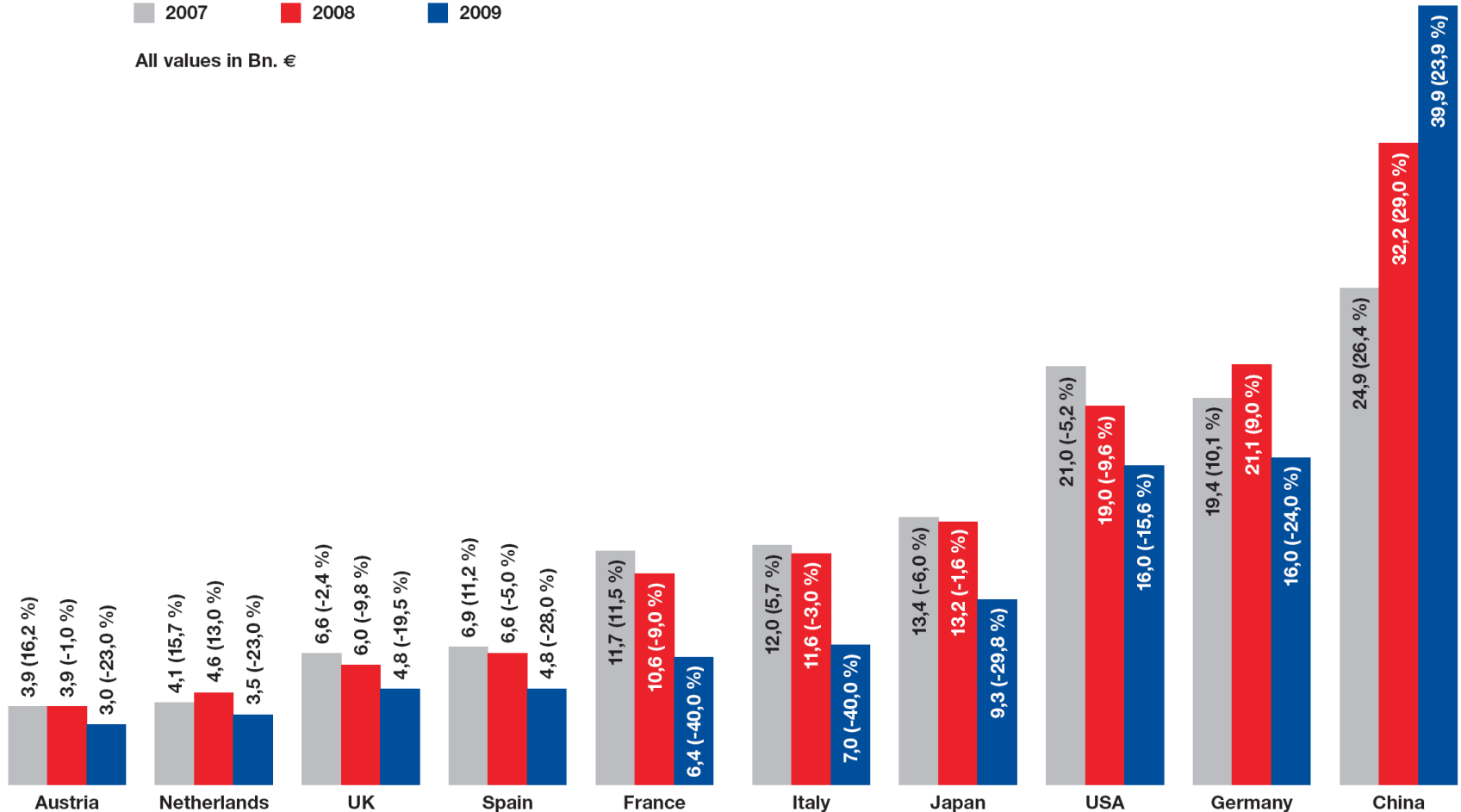
Source: VDMA, Volume, seasonally adjusted – Index 2005 = 100

Intralogistics – History of turnover

Comparison of the most important countries

■ 2007 ■ 2008 ■ 2009

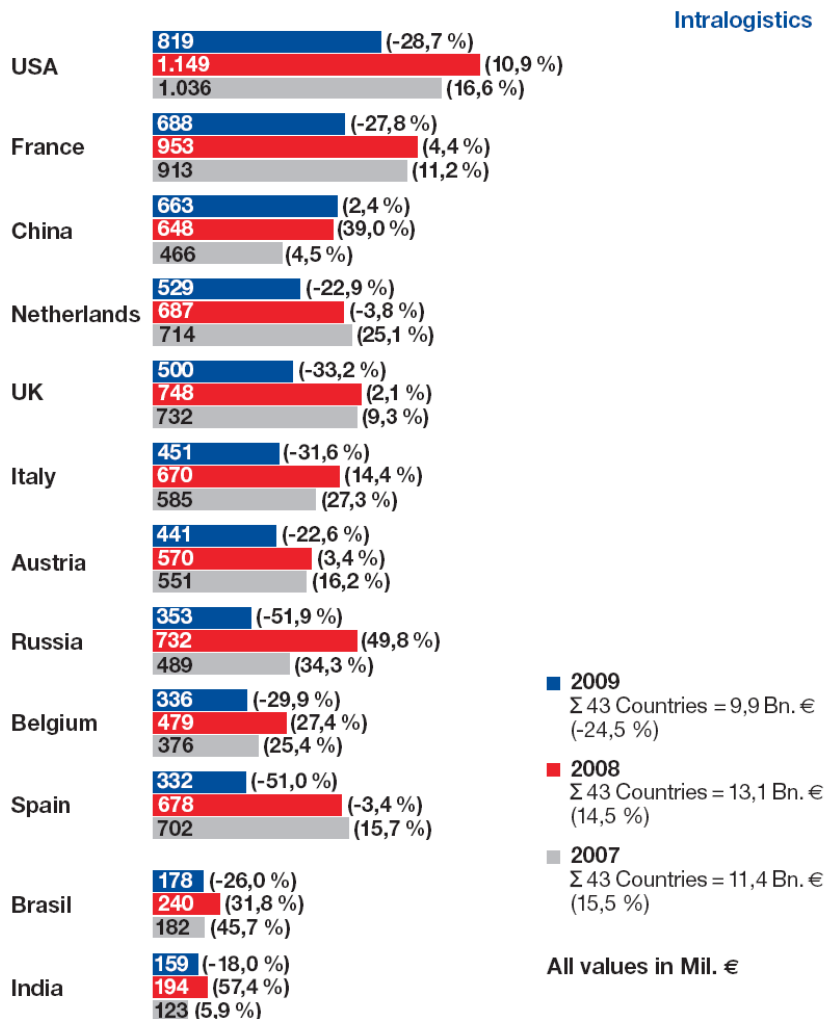
All values in Bn. €



Source: Eurostat, National Statistical Office, VDMA

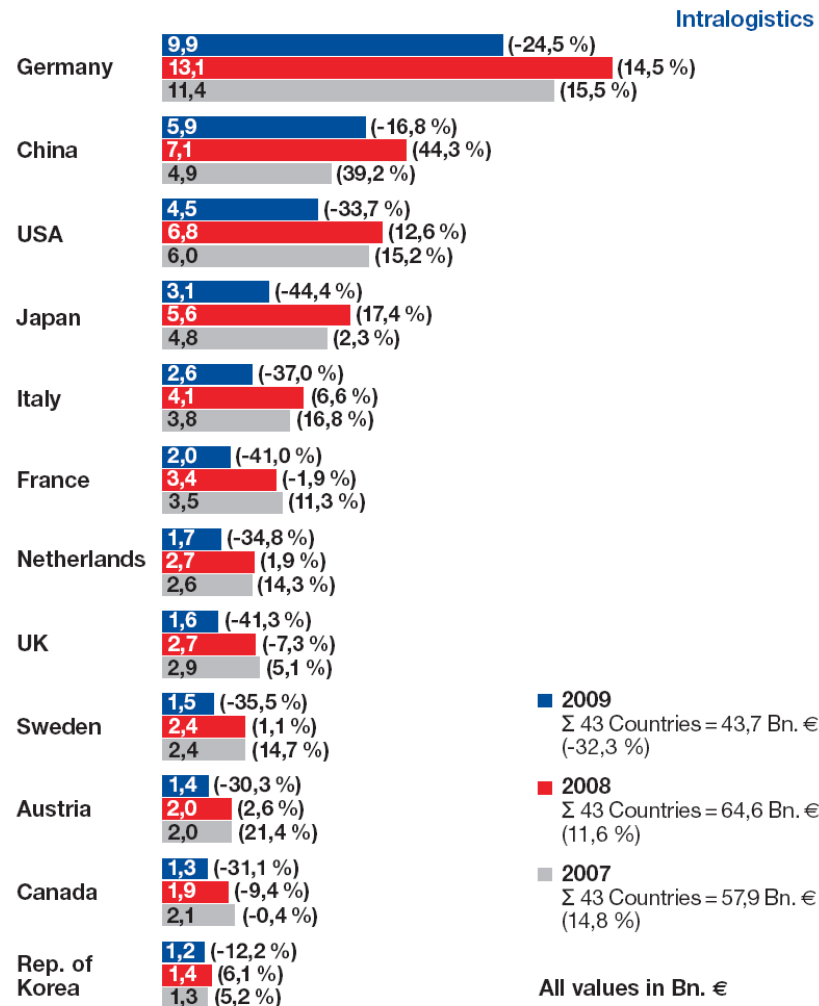
Intralogistics – Customers Countries

Germany's most important customers



Source: National Statistical Office, VDMA

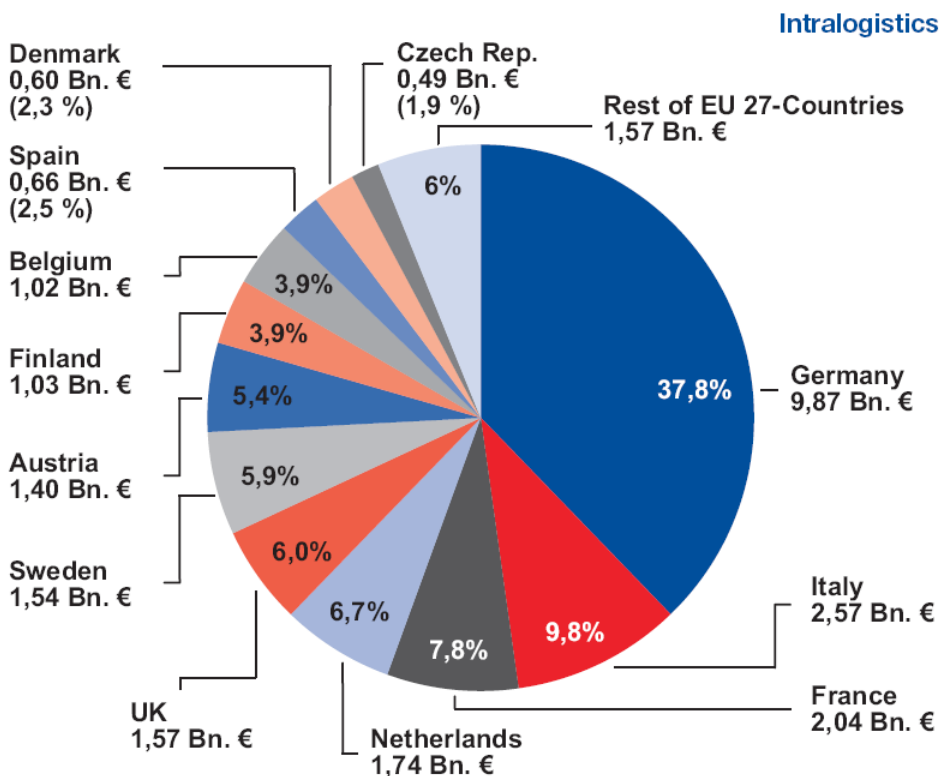
Exports – International comparison



Source: National Statistical Office, VDMA

Intralogistics – International comparison

Exports of the 12 most important EU 27-Countries



Σ World-Export-Volume 2009: 43,7 Bn. € (100 %)

Thereof:

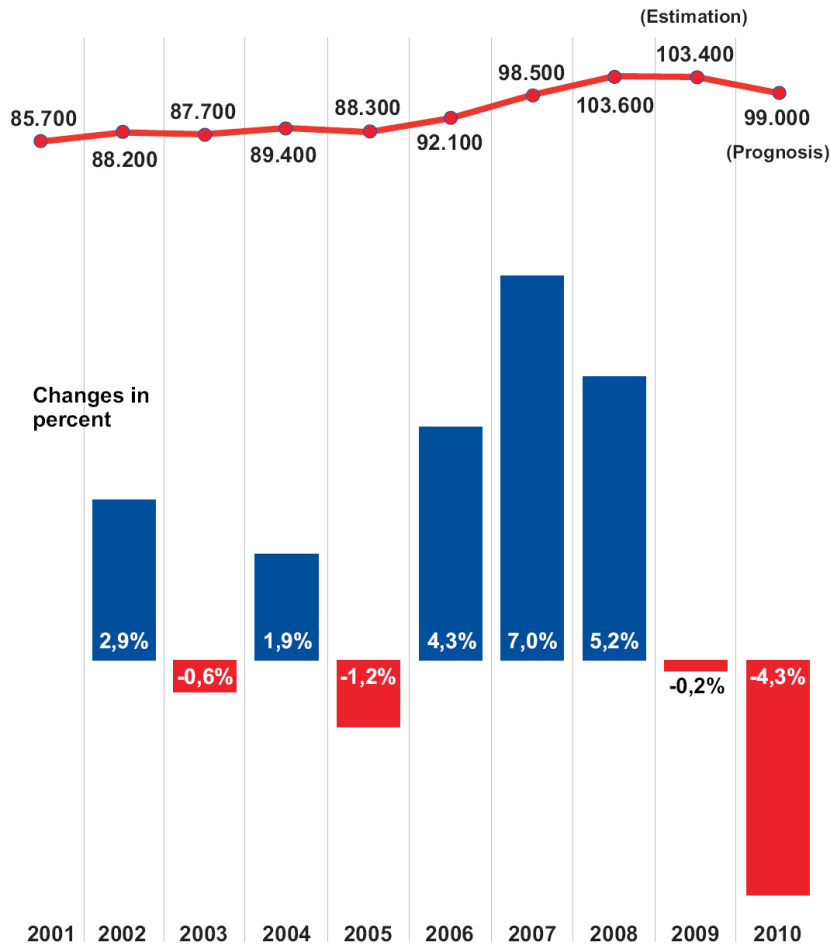
- EU 27: 26,1 Bn. € (59,7 %)
- BRIC-Countries: 6,2 Bn. € (14,2 %)
 - thereof China: 5,9 Bn. €
- NAFTA-Member-Countries: 5,8 Bn. € (13,3 %)
- Japan and South-Korea: 4,4 Bn. € (10,0 %)
- Rest of 43 reporting countries: 1,2 Bn. € (2,8 %)

Export volume of all EU 27-Countries: Σ 2009: 26,1 Bn. € (100 %)

Source: National Statistical Office, VDMA

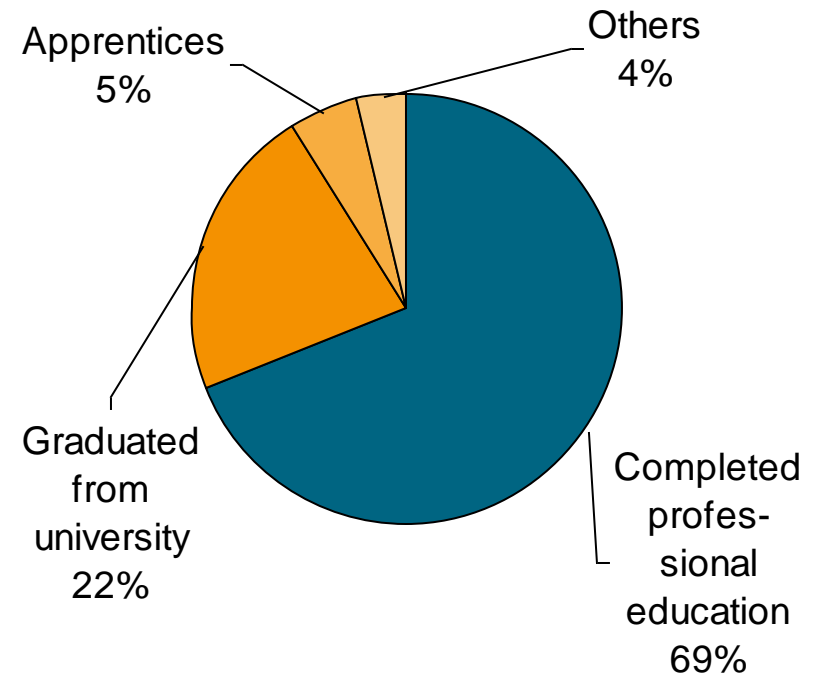
Intralogistics - Germany

Personnel development - Germany Intralogistics



Source: DeSTATIS, VDMA

Employees structure Educational degree of employees



Σ 103.400 Employees / 2009

Source: VDMA

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