

# A Clear Mandate for Future Growth – TOP 50 US Companies in Germany

from AmCham Germany

AmCham Germany's annual survey produced mixed results this year. While Germany remains an attractive investment location for US companies, uncertainties about the future economic prospects of the country and the continent, the digital transformation and competition with other global business regions have made themselves felt.

For the ninth year in a row, automaker Ford-Werke GmbH tops the annual ranking with sales of nearly €19.8 billion in 2015. Fellow car manufacturer Adam Opel held onto second place in 2015 with an estimated €14.1 billion in revenue, followed by Amazon Deutschland (€11.1 billion), which moved up one rung from fourth to third place.

## TOP 30 US Employers in Germany

In addition to the TOP 50 Ranking, AmCham Germany lists the TOP 30 US Employers in Germany. In 2015, these companies accounted for nearly 330,000 jobs, with McDonald's Deutschland taking the lead.

## Domestic Challenges: Digitization, Skilled Labor and Energy

AmCham Germany also uses its annual ranking to find out how US companies view Germany as an investment location. In comparison to last year, Germany was given a slightly lower grade of 2.4 (2015: 2.1) on a scale from 1 (excellent) to 6 (unsatisfactory). Nearly two-thirds of respondents (63%) expressed the need to foster and advance digital transformation – an increase of 13% from last year. Moreover, more than half of the surveyed companies (58%) feel that not enough has been done to ensure the supply of skilled labor in Germany.

## More Action Needed to Maintain Europe's Economic Attractiveness

When surveyed on the role of Europe in the global economy, nearly nine out of ten respondents rank the European continent as the most attractive business location outside the US. However, when asked about the scenario in five years' time, only 55% of respondents

believe that Europe will remain number one after the US, while 45% see Asia in the lead. Reasons for this shift in attractiveness include economic instability in the EU (78% of the respondents), the rise of populist parties (68%) and uncertainties about the legitimacy of EU institutions (63%). Nevertheless, there is good news in the field of digitization: Nearly three quarters of respondents believe that Europe is both a partner and a healthy competitor for the US. ■

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Watch this year's TOP 50 Podcast here:



- 1) Company estimate.
- 2) Including franchises.
- 3) AmCham Germany estimate.
- 4) Data including Johnson Controls Automotive Experience, Building Efficiency and Power Solutions.
- 5) Data taken from company website and/or annual report pursuant to SEC filing requirements (Form 10-K).
- 6) Significant US employer, but not in TOP 50 Ranking due to lower sales revenue.
- 7) Data including Pizza Hut and Kentucky Fried Chicken.
- 8) Data including business segments Consumer, Medical Devices and Pharmaceuticals.

TOP 30 US Employers in Germany	Employees 2015
1. McDonald's Deutschland Inc.	58,000 <sup>1,2</sup>
2. ManpowerGroup Germany	27,000
3. Ford-Werke GmbH	25,426
4. Adam Opel AG	18,160
5. United Parcel Service Deutschland Inc. & Co. OHG	18,000
6. IBM Gruppe	16,500 <sup>3</sup>
7. Johnson Controls <sup>4</sup>	12,000 <sup>3</sup>
8. GE Deutschland	11,000 <sup>1,5</sup>
9. Amazon Deutschland	10,000 <sup>1,5</sup>
10. Procter & Gamble Gruppe	10,000 <sup>1</sup>
11. Aramark Holdings GmbH & Co. KG <sup>6</sup>	9,200
12. Coca-Cola Germany	9,000
13. Hewlett-Packard GmbH	8,731 <sup>5</sup>
14. Federal-Mogul	8,200 <sup>3</sup>
15. Goodyear	7,300
16. 3M Deutschland GmbH	6,700
17. John Deere GmbH & Co. KG	6,610 <sup>1,5</sup>
18. Honeywell Deutschland Holding GmbH	6,500 <sup>1,5</sup>
19. Yum! Restaurants International Ltd. & Co. KG <sup>6,7</sup>	6,250 <sup>2,3</sup>
20. Subway <sup>6</sup>	6,100 <sup>2,3</sup>
21. Terex Germany <sup>6</sup>	6,000 <sup>3</sup>
22. Lear Corporation	5,500 <sup>3</sup>
23. United Technologies Corporation	5,381
24. TE Connectivity Germany GmbH	5,072
25. EATON Gruppe	5,000 <sup>3</sup>
26. Thermo Fisher Scientific Germany <sup>6</sup>	5,000 <sup>1</sup>
27. Dow Deutschland Anlagengesellschaft mbH	4,530
28. AGCO GmbH	4,200
29. Johnson & Johnson Gruppe <sup>8</sup>	4,000 <sup>1,5</sup>
30. Parker Hannifin GmbH	3,968

Company	Top executive(s)	Address	Sales in 2015 (€)	Employees	US parent company	Branch/industry
1. Ford-Werke GmbH www.ford.de	Bernhard Mattes	Henry-Ford-Str. 1 50735 Cologne	19,760,000,000	25,426	Ford Motor Company Dearborn, MI	Automotive
2. Adam Opel AG www.opel.de	William F. Bertagni, Ulrich Schumacher	Bahnhofplatz 65423 Rüsselsheim	14,100,000,000 estimate	18,160	General Motors Company Detroit, MI	Automotive
3. Amazon Deutschland <sup>1</sup> www.amazon.de	Ralf Kleber	Marcel-Breuer-Str. 12 80807 Munich	11,072,000,000 <sup>2,3</sup>	10,000 <sup>3,4</sup>	Amazon.com, Inc. Seattle, WA	Internet retail
4. ExxonMobil Central Europe Holding GmbH www.exxonmobil.de	Florian Barsch, Dr. Annette Flormann-Pfaff, H. Herbert Krebühl	Caffamacherreihe 5 20355 Hamburg	9,500,000,000 incl. petroleum tax	2,946	Exxon Mobil Corporation Irving, TX	Oil and gas (upstream and downstream), chemicals
5. IBM Gruppe <sup>1</sup> www.ibm.com/de-de	Martina Koederitz	IBM-Allee 1 71139 Ehningen	7,290,000,000 estimate	16,500 estimate	IBM Corporation Armonk, NY	IT
6. JET Tankstellen Deutschland GmbH www.jet-tankstellen.de	Jörg Biermann, Georg Ober, Anthony Reddington	Caffamacherreihe 1 20355 Hamburg	6,930,000,000 incl. petroleum tax	250	Phillips 66 Company Houston, TX	Energy
7. Philip Morris GmbH www.pmi.com	Stacey Kennedy	Am Haag 14 82166 Gräfelfing	6,300,000,000 <sup>5</sup> incl. tobacco tax	2,400 <sup>4,5</sup>	Philip Morris International Inc. New York, NY	Tobacco
8. Hewlett-Packard GmbH www.hpe.com/de	Heiko Meyer	Herrenberger Str. 140 71034 Böblingen	5,917,000,000 <sup>3</sup>	8,731 <sup>3</sup>	Hewlett Packard Enterprise Palo Alto, CA	IT
9. GE Deutschland <sup>1</sup> www.ge.com/de	Dr. Carlos Härtel, Udo Josef Klaeren	Bleichstr. 64-66 60313 Frankfurt/M	5,800,000,000 estimate	11,000 <sup>3,4</sup>	General Electric Company Fairfield, CT	Energy, technology, service
10. Apple <sup>1</sup> www.apple.de	Gene Daniel Levoff, Gary Joseph Wipfler	Arnulfstr. 19 80335 Munich	5,500,000,000 estimate	2,200 <sup>3</sup>	Apple Inc. Cupertino, CA	Computers, IT services
11. Ingram Micro <sup>1</sup> www.ingrammicro.de	Ernesto Schmutter	Heisenbergbogen 3 85609 Aschheim	4,700,000,000 estimate	1,500 <sup>3,4</sup>	Ingram Micro Inc. Irvine, CA	IT distribution
12. Microsoft Deutschland <sup>1</sup> www.microsoft.com/de-de	Sabine Bendiek	Konrad-Zuse-Str. 1 85716 Unterschleißheim	3,400,000,000 estimate	2,700 <sup>3,4</sup>	Microsoft Corporation Redmond, WA	IT, software
13. John Deere GmbH & Co. KG www.deere.de	Markwart von Pentz, Christoph Wigger	John-Deere-Str. 8 76646 Bruchsal	3,170,000,000 <sup>3</sup>	6,610 <sup>3,4</sup>	Deere & Company Moline, IL	Farm equipment
14. Johnson Controls <sup>1,6</sup> www.johnsoncontrols.com/de-de	Alex Molinaroli	Industriest. 20-30 51399 Burscheid	3,162,000,000 <sup>2,3</sup>	12,000 estimate	Johnson Controls, Inc. Milwaukee, WI	Automotive
15. McDonald's Deutschland Inc. www.mcdonalds.de	Marcus Almeling, Holger Beeck	Drygalski-Allee 51 81477 Munich	3,000,000,000 <sup>4</sup>	58,000 <sup>4</sup> incl. franchises	McDonald's Corporation Oak Brook, IL	Quickservice restaurants
16. Procter & Gamble Gruppe <sup>1</sup> www.pg.com/de_de	Franz-Olaf Kallerhoff	Sulzbacher Str. 40-50 65824 Schwalbach	3,000,000,000 estimate	10,000 <sup>4</sup>	The Procter & Gamble Company Cincinnati, OH	Consumer goods
17. Dow Deutschland Anlagengesellschaft mbH www.dow.com	Dr. Willem Huisman	Am Kronberger Hang 4 65824 Schwalbach	2,700,000,000	4,530	The Dow Chemical Company Midland, MI	Chemicals, plastics
18. Intel <sup>1</sup> www.intel.de	Christin Eisenschmid, Christian Lamprechter	Dornacher Str. 1 85622 Feldkirchen	2,700,000,000 estimate	3,200 <sup>3,4</sup>	Intel Corporation Santa Clara, CA	Computer components
19. Cargill <sup>1</sup> www.cargill.de	Ludger te Laak	Cerestarstr. 2 47809 Krefeld	2,534,000,000	1,816	Cargill Incorporated Minnetonka, MN	Food manufacturing
20. Arrow Central Europe GmbH www.arrow.com	Andrew King, Robert Schickhoff	Frankfurter Str. 211 63263 Neu-Isenburg	2,500,000,000 estimate	1,000 estimate	Arrow Electronics Centennial, CO	Electronics
21. Google Germany <sup>1</sup> www.google.de	Philipp Justus	ABC-Str. 19 20354 Hamburg	2,500,000,000 estimate	1,000 estimate	Alphabet Inc. Mountain View, CA	Internet services
22. Unitymedia GmbH <sup>7</sup> www.unitymedia.de	Lutz Schüler	Aachener Str. 746-750 50933 Cologne	2,172,300,000 <sup>3</sup>	2,654 <sup>3</sup>	Liberty Global plc London, United Kingdom	Telecommunica- tions, media
23. 3M Deutschland GmbH www.3mdeutschland.de	Dr. John Banovetz	Carl-Schurz-Str. 1 41453 Neuss	2,100,000,000	6,700	3M Company St. Paul, MN	Multi-technology
24. Johnson & Johnson Gruppe <sup>1,8</sup> www.jnj.de	Jan Meurer	Johnson & Johnson Platz 2 41470 Neuss	2,100,000,000 estimate	4,000 <sup>3,4</sup>	Johnson & Johnson New Brunswick, NJ	Healthcare products
25. Celanese GmbH <sup>9</sup> www.celanese.de	Jens Kurth, Michael Willms	Am Unisys Park 1 65843 Sulzbach	2,022,000,000	1,455	Celanese Corporation Irving, TX	Chemicals
26. AGCO GmbH www.fendt.com/de	Peter-Josef Paffen	Johann-Georg-Fendt-Str. 4 87616 Marktoberdorf	2,000,000,000	4,200	AGCO Corporation Duluth, GA	Farm equipment
27. Coca-Cola Germany <sup>1</sup> www.coca-cola-deutschland.de	Bianca Bourbon, Barbara Körner	Stralauer Allee 4 10245 Berlin	2,000,000,000	9,000	The Coca-Cola Company Atlanta, GA	Beverages
28. Mondelez Deutschland <sup>1</sup> www.mondelezinternational.com	Thorsten Rodehüser	Langemarckstr. 4-20 28199 Bremen	2,000,000,000 estimate	2,000 estimate	Mondelez International, Inc. Deerfield, IL	Food manufacturing

All gray colored entries include estimates conducted solely by AmCham Germany and Accenture.

Company	Top executive(s)	Address	Sales in 2015 (€)	Employees	US parent company	Branch/industry
29. Lear Corporation <sup>1</sup> www.lear.com	Jörg Finke, Robert C. Hooper	Vor der Schanz 1-5 65462 Ginsheim- Gustavsburg	1,862,000,000 <sup>2,3</sup>	5,500 estimate	Lear Corporation Southfield, MI	Motor vehicle manufacturing
30. Caterpillar Gruppe <sup>1</sup> www.cat.com/de_de	Klaus Ukens	Karl-Funke-Str. 36 44149 Dortmund	1,800,000,000 estimate	3,900 <sup>3,4</sup>	Caterpillar Inc. Peoria, IL	Machinery manufacturing
31. Mars Deutschland <sup>1</sup> www.mars.de	Tom Albold, Tomasz Pawlowski	Industriering 17 41751 Viersen	1,800,000,000 estimate	2,600 <sup>3,4</sup>	Mars, Incorporated McLean, VA	Food, petfood
32. Goodyear <sup>1</sup> www.goodyear-dunlop.de	Alexander Bleider, Evelyne Freitag, Susanne Seither, Jürgen Titz	Dunlopstr. 2 63450 Hanau	1,724,678,900	7,300	The Goodyear Tire & Rubber Company Akron, OH	Tire industry
33. Pfizer Deutschland <sup>1</sup> www.pfizer.de	Peter Albiez	Linkstr. 10 10785 Berlin	1,700,000,000 estimate	2,000	Pfizer Inc. New York, NY	Pharmaceutical and medical manufacturing
34. EATON Gruppe <sup>1,7</sup> www.eaton.de	Christof Spiegel	Hein-Möller-Str. 7-11 53115 Bonn	1,500,000,000 estimate	5,000 estimate	EATON Corporation plc Dublin, Ireland	Power manage- ment
35. Texas Instruments Deutschland GmbH www.ti.com	Andreas Schwaiger	Haggertystr. 1 85356 Freising	1,500,000,000 estimate	1,500 estimate	Texas Instruments Inc. Dallas, TX	Electronic equip- ment
36. Federal-Mogul <sup>1</sup> www.federalmogul.com/de-de	Rainer Jückstock, Daniel A. Ninivaggi	Stielstr. 11 65201 Wiesbaden	1,376,000,000 <sup>2,3</sup>	8,200 estimate	Federal-Mogul Corporation Southfield, MI	Automotive
37. Nike Deutschland <sup>1</sup> www.nike.de/de_de	Daniel Eppler	Otto-Fleck-Schneise 7 60528 Frankfurt/M	1,365,000,000 estimate	300 estimate	Nike, Inc. Beaverton, OR	Sports equipment
38. Oracle <sup>1</sup> www.oracle.com/de	Frank Obermeier	Riesstr. 25 80992 Munich	1,347,000,000 <sup>2,3,10</sup>	2,100 <sup>11</sup> estimate	Oracle Corporation Redwood City, CA	IT, software
39. United Technologies Corporation <sup>1</sup> www.utc.com	Udo Hoffmann <sup>12</sup>	Otisstr. 33 13507 Berlin	1,339,000,000 <sup>2</sup>	5,381	United Technologies Corporation Farmington, CT	High-tech products, research
40. Honeywell Deutschland Holding GmbH www.honeywell.com	Matthias Maaz, Reiner Turban	Strahlenbergerstr. 110-112 63067 Offenbach	1,300,000,000 estimate	6,500 <sup>3,4</sup>	Honeywell International, Inc. Morris Plains, NJ	Control technolo- gies, aerospace, transportation systems
41. MSD SHARP & DOHME GMBH www.msd.de	Dr. Claus Dollinger, Dr. Susanne Fiedler, Dr. Kristian Löbner	Lindenplatz 1 85540 Haar	1,300,000,000	2,200 <sup>13</sup>	Merck & Co., Inc. Kenilworth, NJ	Pharmaceuticals
42. eBay <sup>1</sup> www.ebay.de	Stefan Wenzel	Albert-Einstein-Ring 2-6 14532 Kleinmachnow	1,227,000,000 <sup>2,3</sup>	1,000 <sup>3,4</sup>	eBay Inc. San Jose, CA	Internet services
43. United Parcel Service Deutsch- land Inc. & Co. OHG www.ups.com/de	Frank Sportolari	Görlitzer Str. 1 41460 Neuss	1,225,000,000 estimate	18,000	United Parcel Service of America, Inc. Atlanta, GA	Parcel and express delivery, logistics services
44. Dell <sup>1</sup> www.dell.de	Doris Albiez, Mark Möbius, Jürgen Renz	Main Airport Center, Unterschweinstiege 10 60549 Frankfurt/M	1,200,000,000 estimate	2,000 <sup>3,4</sup>	Dell Inc. Round Rock, TX	Computers, IT services
45. TE Connectivity Germany GmbH <sup>7</sup> www.te.com	Eric Küppers, Thomas Schmidt	Ampèrestr. 12-14 64625 Bensheim	1,105,000,000	5,072	TE Connectivity Ltd. Schaffhausen, Switzerland	Electronics
46. EMC Deutschland <sup>1</sup> www.emc.com	Dinko Eror	Am Kronberger Hang 2a 65824 Schwalbach	1,030,000,000 estimate	1,200 estimate	EMC Corporation Hopkinton, MA	Computer storage
47. Parker Hannifin GmbH www.parker.com/de	Dr. Hans-Jürgen Haas, Ellen Raahede Secher, Günter Schrank, Cornelis Johannes Veraart	Am Metallwerk 9 33659 Bielefeld	1,025,339,804	3,968	Parker Hannifin Corporation Cleveland, OH	Motion and control technologies and systems
48. AbbVie Deutschland <sup>1</sup> www.abbvie.de	Dr. Patrick Horber	Mainzer Str. 81 65189 Wiesbaden	1,014,000,000 <sup>2,3</sup>	2,600 <sup>3,4</sup>	AbbVie Inc. North Chicago, IL	Biotechnology
49. Abbott Deutschland <sup>1</sup> www.abbott.de	Stefan Boll, John Coulter	Max-Planck-Ring 2 65205 Wiesbaden	941,000,000 <sup>2,3</sup>	2,600 <sup>3,4</sup>	Abbott Laboratories Abbott Park, IL	Biotechnology, pharmaceuticals
50. ManpowerGroup Germany <sup>1</sup> www.manpower.de	Herwarth Brune	Düsseldorfer Str. 9 65760 Eschborn	921,000,000	27,000	ManpowerGroup Inc. Milwaukee, WI	Employment services

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Note: If more than one top executive is given, names are listed alphabetically.

1) In cases where no corporate identity is given (e.g., GmbH, AG or KG), sales are generally combined from multiple sources; that is, from various associated companies.

2) Data converted from US Dollars and rounded based on average annual exchange rate for 2015.

3) Data taken from company website and/or annual report pursuant to SEC filing requirements (Form 10-K).

4) Company estimate.

5) Data for 2014.

6) Data including Johnson Controls Automotive Experience, Building Efficiency and Power Solutions.

7) Majority of parent company shares in US possession.

8) Data including business segments Consumer, Medical Devices and Pharmaceuticals.

9) Sales data for European markets consolidated in Celanese GmbH.

10) Data through end of May 2016.

11) Data for Oracle Deutschland B.V. & Co. KG.

12) Top executive and German address data for OTIS & Co. OHG.

13) Employee data including MSD Tiergesundheits.