

Future AI-Startup Pitch @APK24

Launching the German
Asia Pacific Startup Award



AHK
Annual Report
2024

For the economy. On the ground worldwide.



Forewords

AHK ANNUAL REPORT 2024

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Glossary

INSTITUTIONS **DIHK** German Chamber of Commerce and Industry | **IHK** Chamber of Industry and Commerce | **AHK** German Chamber of Commerce Abroad or Delegation of German Industry and Commerce | **BMWK / BMW E** Formerly: Federal Ministry for Economic Affairs and Climate Action; Now: Federal Ministry for Economic Affairs and Energy | **LAI** Latin America Initiative of German Business | **DERA** German Mineral Resources Agency | **BGR** German Federal Institute for Geosciences and Natural Resources | **GTAI** Germany Trade & Invest | **SOFOFA** Sociedad de Fomento Fabril: The Federation of Chilean Industry | **German Mining and Resources Network** The German Mining & Resources Network is a business-oriented platform that supports the German business community in the global mining and resource markets

TITLES AND OFFICES The status at the time of the event is described: Ministers and officeholders were still in office at the time. The names of organisations and federal ministries used reflect their official titles at that time.

“Our Chambers of Commerce Abroad and delegations of the German economy around the world provide us with a wide-ranging network of passionate experts. This is a great platform on which to build, because the AHK staff deliver high-quality and reliable advice and support for German companies engaging in foreign trade and investment. Particularly in difficult geopolitical times, the AHKs are making an important contribution towards the resilience of our trade and supply relationships, maintaining our economic security, and boosting the competitiveness of our exporting companies in general. The Federal Government will continue to strengthen its support for the promotion of foreign trade and investment in other countries.”



Katherina Reiche
Federal Minister for Economic
Affairs and Energy (BMW E)

“The year 2024 was marked by geopolitical tensions and structural upheavals. Risks materialised, and opportunities often failed to come to fruition.

Our surveys show that German businesses are increasingly confronted with international trade barriers, which is also dampening export expectations. In addition to challenges in foreign markets, obstacles are also increasing within Germany and Europe: excessive reporting requirements, lengthy approval procedures, and other bureaucracy issues. The burden on internationally oriented companies has been considerable.

For us, this means one thing in particular: we must advocate for the interests of the German economy and support companies in seizing the opportunities that do exist – both in Germany and around the world. We do this through the network of German Chambers of Commerce Abroad (AHKs), which operate as service pro-

viders and networkers in over 90 countries worldwide. Through working groups, position papers, and numerous direct conversations, they represent the interests of the German business community on site. The AHKs are ambassadors of German businesses across the globe and are at the very heart of the business landscape of their respective locations.

This must be harnessed for the benefit of the economy: identifying new market opportunities, finding reliable partners, and embracing innovative ideas. Only those who recognise trends early, prepare diligently, and make well-considered decisions can succeed in these challenging times – securing and expanding prosperity, jobs, and innovative strength for Germany.

We are proud of the strong AHK network. Established over 130 years ago, it continues to be one of the strongest assets of Germany’s foreign trade promotion.”



Peter Adrian President
German Chamber of Commerce and Industry (DIHK)

Helena Melnikov Chief Executive Officer

Highlights 2024



DELEGATION TRIP TO UKRAINE

DIHK Leaders Send a Message of Confidence in Ukraine

With their trip to Lviv and Kyiv in early July 2024, DIHK executives Volker Treier, Head of Foreign Trade, and Achim Dercks, Deputy Chief Executive, together with representatives of several IHKs, sent a strong signal of solidarity with Ukraine. The visit took place as part of the activities of the DIHK Competence Centre Reconstruction Ukraine, focusing on closer economic cooperation and joint projects for rebuilding Ukraine. On site, it became clear that - despite the challenging circumstances - business and public administration in Ukraine are unwaveringly committed to supporting Ukraine's recovery.

In Lviv, the delegation held talks with the regional governor, the president of the Lviv Chamber of Industry and Commerce, and German investors. In Kyiv, meetings were held with the president of the AHK Ukraine, the German ambassador, and government representatives. Emphasis was placed on the importance of international measures such as German investment guarantees and marine transport insurance for shipping routes via the Black Sea. At the same time, the involved stakeholders highlighted the need to make more consistent use of existing risk mitigation instruments and to mobilise private capital for reconstruction.

The delegation was supported by AHK Ukraine, which handled logistics and coordinated appointments.





“The export industry is navigating troubled waters. Tailored support abroad is therefore even more important. The German Chambers of Commerce Abroad and Delegations of German Industry and Commerce provide this in an exemplary manner. We would like to express our appreciation for their outstanding work.”

Kristina Heußner, Head of Division for Foreign Trade Promotion,
Federal Ministry for Economic Affairs and Energy

GERMAN-CHILEAN BUSINESS FORUM IN BERLIN

Elevating Strategic Partnership ▶

Chile is a strategically important partner for German companies in Latin America due to its raw materials, its potential for expanding renewable energy, and its role as a prospective supplier of green hydrogen and lithium.

During the visit of the President of the Republic of Chile, H.E. Gabriel Boric, the Latin America Initiative of German Business (LAI), coordinated by the DIHK, organised the German Chilean Business Forum on 11th June 2024 in cooperation with the AHK Chile and Chilean partners. The welcoming speech was given by LAI Chairman Ingo Kramer. The Chilean President discussed his country's potential, and Franziska Brantner, State Secretary at the BMWK, emphasised Chile's importance for Germany's raw material supply. The business roundtables on “Clean Energy” and “Critical Raw Materials” were led by Chilean Ministers Diego Pardow (Energy) and Nicolás



Grau (Economy). The AHK Chile attended with a business delegation and signed cooperation agreements on vocational education and training, particularly focusing on sustainable value chains.

Regional Conferences of German Business



18TH ASIA-PACIFIC CONFERENCE OF GERMAN BUSINESS
WITH CHANCELLOR SCHOLZ AND PRIME MINISTER MODI

◀ Strategic Political Cooperation Fuels Business Growth

Around 800 representatives from business and politics gathered in New Delhi from 24th to 26th October 2024 for the 18th Asia-Pacific Conference of German Business (APK). The conference was jointly presided over by Federal Minister Robert Habeck and Roland Busch, Chairman of the Asia-Pacific Committee of German Business (APA). DIHK President Peter Adrian welcomed participants on behalf of the DIHK and the AHK network.

The largest German business conference in the region focused on key topics such as resilient supply chains, geoeconomics, artificial intelligence, sustainable finance, and raw materials. The event was hosted by the AHK India.

India's special significance as a partner for Germany was underscored by the German-Indian government consultations which took place at the same time and by the fact that Federal Chancellor Olaf Scholz and Prime Minister Narendra Modi both attended the APK.

5TH GERMAN-AFRICAN BUSINESS SUMMIT

High Demand for Business Dialogue ▼

More than 900 delegates from Germany and over 30 African countries took part in the German-African Business Summit (GABS) in Nairobi from 2nd to 4th December 2024. The summit focused on trade and investment projects in Africa.

The 5th GABS was organised by the Delegation of German Industry and Commerce for East Africa in cooperation with the Sub-Saharan Africa Initiative of German Business (SAFRI). The conference was opened by Vice Chancellor and Federal Minister for Economic Affairs Robert Habeck, Kenyan Prime Minister Musalia Mudavadi, and SAFRI Chair Thomas Schäfer.

The diversity of the African continent was reflected in the wide range of formats and topics covered at GABS – from energy and raw materials to skilled labour and start-ups.



Going International

ONGOING CHALLENGES FOR GERMAN COMPANIES

Trade Barriers Slow Down International Business

Once a year, the Chambers of Industry and Commerce (IHKs) conduct a survey among internationally active companies in Germany about their experiences and expectations in foreign markets. The aim is to gain a comprehensive picture of obstacles and challenges. Nearly 2,400 companies took part in the survey conducted in February 2024.

The result: 61 percent of companies reported an increase in trade barriers – the highest figure since the survey began. The trend of rising obstacles in international business continued.

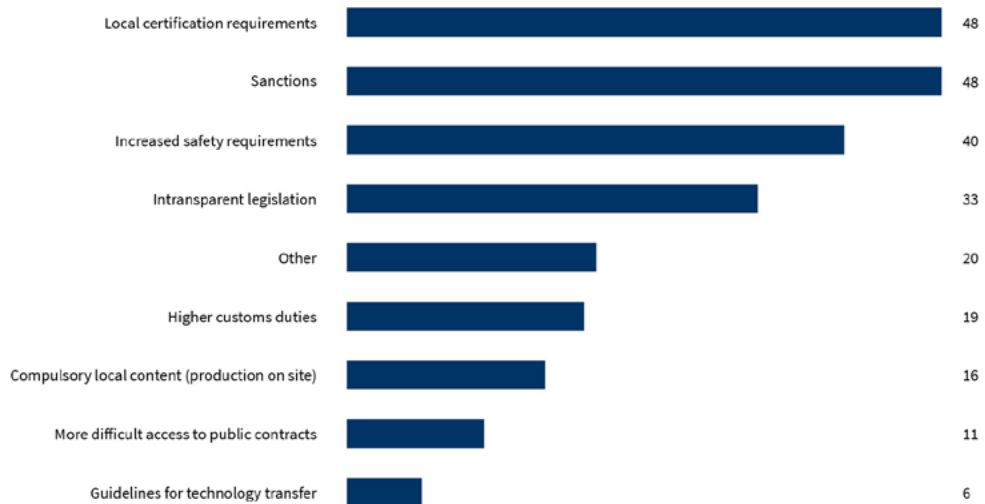
Companies most frequently cited non-tariff trade barriers, such as local certification and safety requirements. Almost half of those affected saw this as a significant additional burden in terms of planning and costs

for cross-border trade. Sanctions were hindering every second company from maintaining existing business relationships. One third complained about non-transparent legislation, one in five companies about higher tariffs on exports and imports. 16 percent criticised local content requirements.

However, companies were not only facing hurdles abroad. Trade barriers originating from Germany and the EU were increasingly coming into focus. Many companies pointed to excessive bureaucracy and uncertainty in implementing European regulations. Additional problems arose in the processing of international business – for example, due to long approval times at the Federal Office for Economic Affairs and Export Control (BAFA) or complex customs procedures.

INCREASE IN TRADE BARRIERS IN INTERNATIONAL BUSINESS

(IN PERCENT, MULTIPLE ANSWERS POSSIBLE)



Source: Going International 2024

AHK World Business Outlook

GLOBAL MARKETS UNDER PRESSURE

Cautious Optimism Abroad

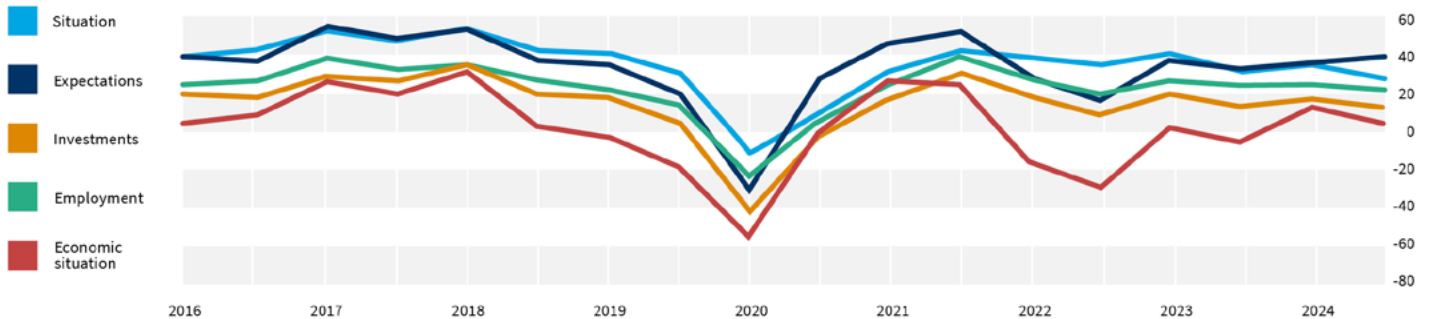
The AHK World Business Outlook is a biannual survey conducted by the DIHK among member companies of the AHKs worldwide. In 2024, nearly 8,000 companies participated. The results offered valuable insights into the economic situation and expectations of German companies at their international locations.

In autumn 2024, the global economy grew moderately. At the same time, geopolitical tensions and structural challenges weighed on business performance. Nearly half of the companies reported a good business situation – although fewer than in spring 2024. Falling inflation rates, interest rate cuts, and rising purchasing power due to higher wages led companies at international locations to view the coming months mostly positively. The overall economic sentiment thus reflected a situation marked by uncertainty and transformation. The outlook was significantly more positive than in autumn 2023 but remained subdued compared to spring 2024.

The survey revealed that German companies worldwide identified two key business risks: a decrease in demand was cited as the greatest challenge by half of the companies globally – particularly in Greater China. General economic and political conditions were ranked second (47 percent globally), especially in the USA, Sub-Saharan Africa, and South and Central America.

Accordingly, investment intentions for the next 12 months were cautious: 30 percent of companies planned to increase investments, while 18 percent expected to reduce them. This marked a decline in investment propensity compared to spring 2024. Employment plans also reflected restraint: around one-third of companies intended to increase staff, while 15 percent planned reductions.

ECONOMIC SITUATION AND BUSINESS EXPECTATIONS OF GERMAN COMPANIES ABROAD (BALANCE OF "BETTER MINUS WORSE" REPORTS IN POINTS)



Source: AHK World Business Outlook Fall 2024

FOCUS TOPIC 2024

GTAI & AHKs: Partners in Foreign Trade Promotion

Through their close cooperation, the German Chambers of Commerce Abroad (AHKs) and Germany Trade & Invest (GTAI) provide a coordinated and complementary range of advisory and support services for internationally oriented German companies as well as potential foreign investors. While GTAI provides in-depth analyses and up-to-date economic data to promote Germany as an investment location, the AHKs offer practical, hands-on advice on establishing and expanding international business operations at 150 locations worldwide.

At many international locations, GTAI and the AHKs share office space, creating ideal conditions for continuous information exchange and coordinated collaboration.

Joint appearances at delegation briefings, trade fairs, and information events both in Germany and abroad further demonstrate how the AHKs and GTAI complement and support each other.

Another example of their close cooperation is location marketing and investor outreach for Germany: GTAI experts travel the globe to promote Germany as a business location and to convince companies to establish operations there. However, they cannot cover all markets alone, which is why they work with the AHK network to identify foreign investors for the German market. The AHKs first identify potential investors, who are then advised and supported by GTAI throughout the process.



“This long-standing partnership combines strategic analytical expertise with local market knowledge. The AHKs draw on GTAI’s data and assessments, while GTAI benefits from the AHKs’ direct proximity to companies in the respective markets.”

Julia Braune, CEO of Germany Trade & Invest

AHK Network: Supporting the German Economy for 130 Years

What began in 1894 in Brussels as the first German chamber abroad has grown into a global network. Today, the AHKs operate at 150 locations in over 90 countries, assisting companies with market entry, recruiting skilled labour, and networking globally.

FROM EARLY BEGINNINGS TO A GLOBAL STRUCTURE

The first chamber abroad in Brussels was a response to the growing needs for exchange and representation of German companies operating internationally. Soon, additional chambers were established in the Netherlands and Switzerland. However, the network as we know it today only began to take shape in the 1920s, when the chambers became more interconnected and focused on bilateral economic interests. A foundational moment was the first AHK conference held in Berlin in 1924.

After the World Wars, which disrupted international connections, the re-establishment of the AHK network began in 1946 with the German-Italian Chamber of Commerce and in 1947 with the US-German Chamber of Commerce in New York. Since then, the network has continued to expand – most recently in 2023 with the opening of a Delegation of German Industry and Commerce in Côte d'Ivoire.

In 2024, the AHK network celebrated its 130th anniversary. At the same time, more than 20 AHKs around the world celebrated round anniversaries of their own.



AHK anniversaries 2024

10 years of

MOZAMBIQUE 2014

15 years of

ANGOLA 2009

20 years of

SINGAPORE 2004

Congratulations

to

25 years of

ICELAND & ROMANIA 1999

30 years of

CHINA, ESTONIA, KAZAKHSTAN,
TURKEY & VIETNAM 1994

35 years of

USA PHILADELPHIA 1989

70 years of

PORTUGAL & VENEZUELA 1954

45 years of

SAUDI ARABIA &
TUNISIA 1979

In 2024, the AHK network celebrated its 130th anniversary – and for many German Chambers of Commerce Abroad, 2024 also marked an important milestone. Warm congratulations especially to the following locations that celebrated a major AHK anniversary, thereby reaffirming decades of work in fostering bilateral economic relations between Germany and their host countries.

95 years of

MEXICO 1929

100 years of

INDONESIA & GREECE 1924

130 years of

BELGIUM & LUXEMBOURG 1894

OVER

45,300

MEMBERSHIPS

MORE THAN

232,600

BUSINESS ENQUIRIES

OVER

150

LOCATIONS

7,600

EVENTS

147

MILLION EURO TURNOVER*

*Income from service

90 COUNTRIES

2,300

AHK-EMPLOYEES

Current information on the AHK network



Your AHK experts

Find the right contact person for the target market and region you are looking for to set up and expand your foreign business.



**Worldwide
in action for you**



Get to know the organisation better!

At 150 locations in over 90 countries, the AHKs are at your service with many years of expertise.



News from the AHK network

Stay up to date with news and relevant information from across the AHK network via the AHK LinkedIn channel.

OVERVIEW OF THE LOCATIONS

**For the economy. Worldwide on site.
At 150 locations.**



A stylized map of the Americas, including North, Central, and South America, rendered in white against a light blue background. Numerous small black dots are scattered across the map, representing 150 locations. A dark blue arrow-shaped banner points to the left, containing the word 'AMERICAS' in white capital letters. Below the banner is a light blue rectangular box containing a list of countries.

AMERICAS

Argentina
Bolivia
Brazil
Canada
Chile
Colombia
Costa Rica
Cuba
Dominican Republic
Ecuador
El Salvador
Guatemala
Honduras
Mexico
Panama
Paraguay
Peru
USA
Venezuela

Austria	Denmark	Italy	Russia
Azerbaijan	Estonia	Latvia	Serbia
Belarus	Finland	Lithuania	Slovakia
Belgium	France	Netherlands	Slovenia
Bosnia and Herze- govina	Greece	North Macedonia	Spain
Bulgaria	Great Britain	Norway	Sweden
Croatia	Hungary	Poland	Switzerland
Czech Republic	Ireland	Portugal	Turkey
	Israel	Romania	Ukraine

EUROPE

AFRICA | MENA

Algeria
 Angola
 Côte d'Ivoire
 Egypt
 Ghana
 Iraq
 Kenya
 Morocco
 Mozambique
 Nigeria
 Oman
 Qatar
 Saudi Arabia
 South Africa
 Tanzania
 Tunisia
 UAE
 Zambia

ASIA | PACIFIC

Australia	New Zealand
China	Philippines
Hongkong SAR	Singapore
India	Sri Lanka
Indonesia	Taiwan
Japan	Thailand
Kazakhstan	Uzbekistan
Korea	Vietnam
Malaysia	

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