

***CLUSTERS –
drivers of interregional value chains***



An initiative of the European Union

**CLUSTERS MEET
REGIONS** ★

CHIȘINĂU
MOLDOVA

10·11
OCTOBER 2024

CLUSTERS AS DRIVERS OF INTER-REGIONAL VALUE CHAINS

EUROPEAN CLUSTER
COLLABORATION PLATFORM

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DP

Clustero

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How to measure value chains?



UNIDO (2011)

The industrial cluster development approaches, which assume that spatial organization, strategic firm alliances, and networking are sources of systemic competitiveness. Their analytical focus is often on: a) how actors network to exchange goods, services, and information; b) institutional and political frameworks that promote building industrial clusters and the inclusion of small-to-medium-sized firms; and c) the level of knowledge and technology used.



Smile Curve

Smile Curve

Added value

90.00%
80.00%
70.00%
60.00%
50.00%
40.00%
30.00%
20.00%
10.00%
0.00%

RDI Branding Product Development Inbound logistics Production Outbound logistics Marketing Sales Maintenance

Energy - Renewables Agri Food Electronics Digital Furniture Creative & Cultural Textiles Construction Health

Wood & Furniture (Danube Region)



Wood and furniture (No. of companies)	RDI	Branding	Product Development (Design)	Inbound Logistics (Suppliers)	Manufacturing	Outbound Logistics (Distribution)	Marketing Sales	Service (Maintenance)	Total
Austria	16	12	19	56	113	1	2	19	238
Hungary	8	0	29	15	30	25	10	5	122
Montenegro	0	0	2	2	5	0	1	0	10
Romania	5	1	8	13	75	5	4	6	117
Slovenia	14	0	0	0	61	0	0	0	75
Croatia	4	3	5	7	30	6	0	3	58
Total	47	16	63	93	314	37	17	33	620

Mechanical Engineering (Danube Region)



Mechanical Engineering (No of companies)	RDI	Branding	Product Develop ment (Design)	Inbound Logistics (Suppliers)	Manufact uring	Outbound logistics (Distributi on)	Marketin g/Sales	Service (Mainten ance)	Total
Austria	6	0	14	28	53	5	0	9	115
Baden Wuerttemberg	50	50	100	350	400	30	50	25	1055
Hungary	10	0	0	0	24	4	5	24	67
Romania	32	7	20	0	26	1	25	22	133
Serbia	14	0	16	11	67	4	10	53	175
Slovenia	23	4	10	18	48	6	6	15	130
Total	135	61	160	407	618	50	96	148	1675

Mechatronics (Danube Region)



Mechatronics (No. of companies)	RDI	Branding	Product Development (Design)	Inbound Logistics (Suppliers)	Manufacturing	Outbound logistics (Distribution)	Marketing/Sales	Service (Maintenance)	Total
Austria	52	0	105	62	115	20	0	70	424
Bavaria	7	0	15	2	28	2	3	4	61
Baden Wuerttemberg	3	15	30	30	147	30	15	30	300
Hungary	9	0	13	15	23	4	9	23	96
Slovenia	7	0	3	0	10	0	0	4	24
Total	78	15	166	109	323	56	27	131	905

SORINTEX (MD)



SORINTEX	RDI	Branding	Product Developm ent (Design)	Inbound Logistics	Productio n	Outbound Logistics	Marketing /Sales	Service/Mai ntenance
No of enterprises	9.52	4.76	4.76	9.52	66.67	0.00	0.00	4.76
Turnover	16.67	4.17	1.67	8.33	66.67	0.00	0.00	2.50
Exports	10.00	3.50	0.75	0.00	85.00	0.00	0.00	0.75

Lengthening the Value Chain: ASTRICO NE



ASTRICO NE is a silver labeled textile cluster specialised in producing different types of yarns and knitted garments, located in NE Romania. The leader of the group, RIFIL SA Savinesti, is the most important manufacturer of acrylic yarns in the EU.

In 2011, Astrico Nord-Est has developed a collaborative marketing-sales system by setting up a trading company, owned by the members of the cluster. Through this system, the group companies benefit from services such as: marketing, design, prototyping, technical assistance, logistic and financial services.

In 2013, ASTRICO NORD-EST founded its own facility of sampling and collection creation, with the assistance of the knitting machine manufacturer SHIMA –SEIKI. The capacity is equipped with the latest technologies on knitting industry (computer graphic design systems, newest generation of flat knitting machines, sewing machines, complete system for professional washing, drying and ironing).



Conclusions

Strengths	Opportunities
<p>High intensity of the foreign trade</p> <p>Complementarity of sectors in the Danube Region</p>	<p>Enhancing cooperation between Danube regions based on existing competences on specific parts of the value chain.</p> <p>Digitalisation of production and marketing</p> <p>Cross sectoral cooperation (e.g., wood and metal, plastics, textiles)</p>
Weaknesses	Threats
<p>East West technology divide</p> <p>Few companies acting on branding and marketing along the analysed value chains</p> <p>Digitalisation level of companies in the beginning</p>	<p>Migration of traditional clients towards completely new market niches (e.g., automotive to life science)</p> <p>Competition from China based on costs.</p> <p>Online suppliers disrupting traditional supply chains</p>



Thank you!

Daniel Cosnita
President