



Promoting attractiveness, competitiveness and internationalization of Agro-food Clusters of the Med Area



Company survey for in-depth analysis of selected agro-food segment

GLOBAL REPORT




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contents

Result presentation and analysis	4
▪ Basic characteristics of the companies	14
▪ Internationalisation level	23
▪ Innovation level	32
▪ Cooperation & Networking. Participation of the company in intercluster activities	41
▪ Assessment of cluster conditions	57
 Annex	 64



Global report

This report presents the global results of the company survey for in-depth analysis of selected agro-food segment (activity 3.3). The original objectives of the activity were as follows:

- Assess the capacity of networking of companies from the partner regions' agro-food segments.
- Assess their level of innovation.

After several months focused on the elaboration and validation of the common questionnaire and its testing, the survey took place from February to October 2012 between agro-food companies of the partner regions (and country in the case of Cyprus). The survey was carried out through an on-line questionnaire (Google Docs) which was disseminated by partners among regional companies, with a special focus on the selected key segments which have been selected by each partner according to their importance in the regional/local economy, by combining quantitative and qualitative information (see page 8). In the process, two methods of collecting answers were used. On the one hand, a range of companies showed enough motivation and capacity in English to directly fill in the questionnaire on-line. On the other hand, partners acted as intermediaries, performing interviews with companies and then fulfilling the on-line questionnaire on their behalf.

The initial objective was to get 30 answers for each of the segments chosen by partners and, accordingly 90 answers by region. As far as the Emilia Romagna Region is concerned and in line with the specific “intervention area” of the concerned partners, the objective was to get 30 answers from the Parma province (tomato-processing segment), 30 answers from the Modena province (operation of dairy-cheese making segment) and 30 other answers from the whole region (“dosing, wrapping and packaging” segment). Almost 600 answers (597) were finally received.

The following map shows the distribution of answers by partner regions. This distribution is rather balanced, with around 15% of respondents by region. However, while Crete companies are only represented by 2% of respondents, the Provence-Alpes-Côte d’Azur and Alentejo regions have a share of respondents slightly inferior to 15%. In spite of their efforts, these partners have had serious difficulties in reaching the requested number of questionnaires because of several reasons: not enough companies present in the supply chain, difficulties in involving companies, many companies closing because of the economic recession.

Despite being the largest region of Portugal representing 34.3% of the national territory, the Alentejo region has a low-density “business community”. The regional business structure is marked by a predominance of micro and small businesses, focusing especially on local and regional markets, with a weak capacity and entrepreneurship and, finally, a reduced propensity for innovation and internationalization. In addition, the survey took place in a harsh economic context, which is leading an increasing number of companies to bankruptcy.

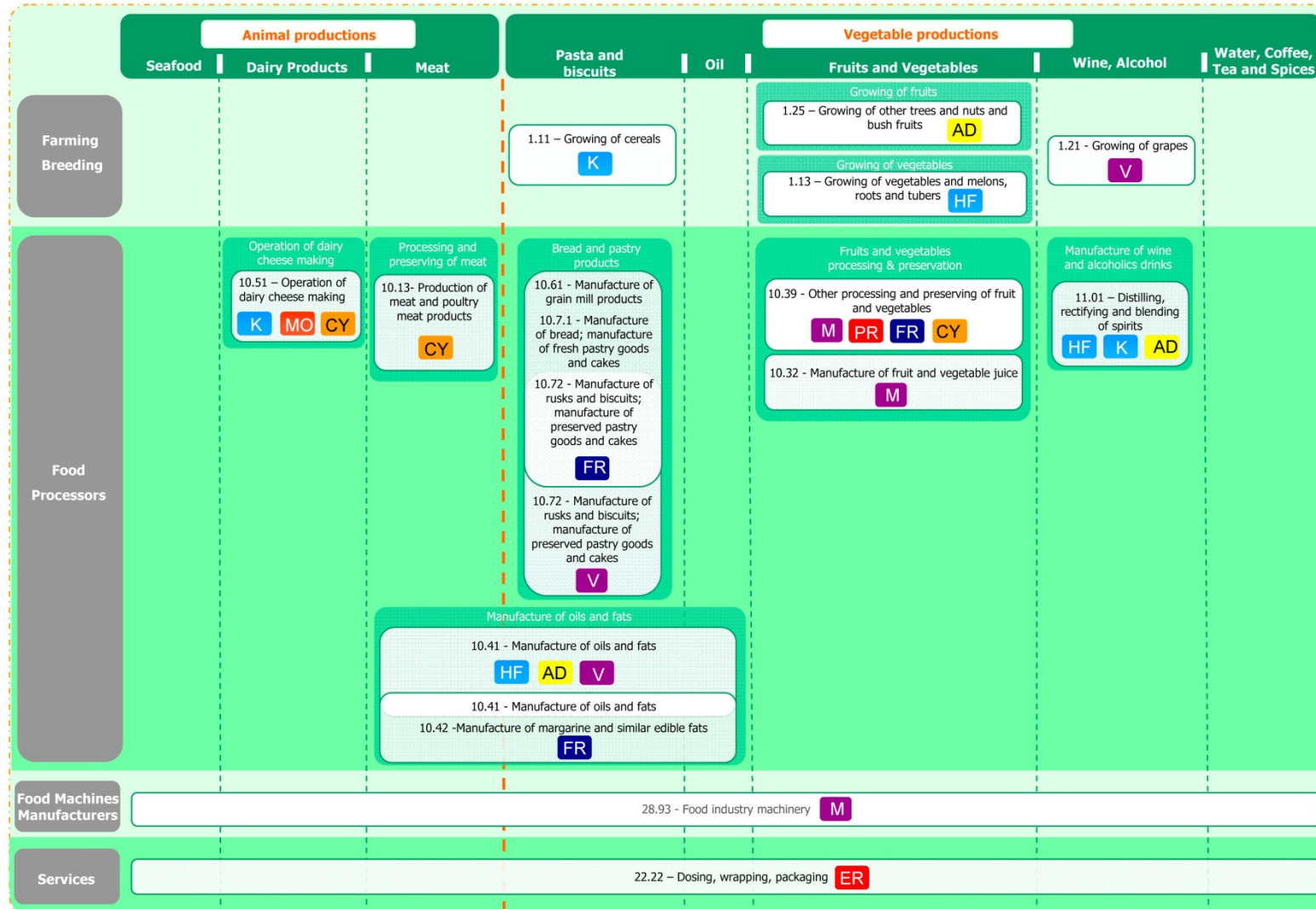
ADRAL multiplied the efforts to reach the survey objectives. In addition to phone calls made directly to companies and the sending of emails with the link to the online survey, the partner met with the GADE - Support Offices of Economic Development – of the several counties in order to involve them also in the activity, since they have more depth knowledge of their area's companies business. In spite of all, reaching 90 questionnaires was not possible. Eventually, ADRAL managed to get 62 replies.

In the specific case of Crete, FORTH had to conduct phone interviews in order to carry out its in-depth analysis of the 3 agro-food segments chosen for the region. It is a fact that the Greek economy's recession has forced many companies to re-define their priorities, the most important -in most cases- being cash liquidity required for their survival. The result is that most Cretan companies were reluctant to spend resources in order to answer the survey questionnaire, although it was translated in Greek.

Location. Regions of companies



Mapping of selected agri-food segments (NACE Codes Rev.2 2007)



Spain (Murcia=M - Impiva = V)

Greece (Help Forward= HF, Kilkis = K)

Cyprus (CUT= CY)

Italy (ERVET = ER, Prov.di Modena = MO, Prov di Parma = PR)

Portugal (Adral= AD)

France (Critt= FR)

These difficulties have also led partners to enlarge the target group, with the initial objective to restrict it to the value chain of the concerned segment. Eventually, it has been necessary to make some groupings of activities so as to reach critical numbers of answers at regional level.

The final composition of the survey sample is the following:

- Operation of dairy cheese making: 16% of respondents.

It includes companies from Cyprus (about half of the sample), the Kilikis region, the Modena province, but also from the Alentejo and Murcia regions.

- Bread and pastry products: 18%.

This segment result from the grouping of the “Manufacture of grain mill products”, “Manufacture of bread, fresh pastry goods and cakes”, “Manufacture of rusks, biscuit, preserved pastry goods and cakes” segments.

It includes companies from the Provence Alpes Côte d’Azur (13%) and Valencia (for about a third) regions and, unexpectedly, from the Kilikis region (actually half of the sample) and a small number of companies from Cyprus, the Alentejo and Murcia regions.

- Fruits and vegetables processing and preservation: 17%.

It consist of 2 segments: “Manufacture of fruit and vegetable juice” and “Other processing and preserving of fruit and vegetables”.

Initially selected as key segment by the Murcia and PACA regions (respectively 34% and 43% of the sample), Cyprus (7%) and the Parma province (10%), the segment representation in the survey also includes entities from the Alentejo and Kilikis regions.

- Horticulture: 12%.

For this segment, the “Growing of vegetables and melons, roots and tubers”, “Growing of grapes”, “Growing of cereals, leguminous crops and oil seeds”, “Growing of other trees and nuts and bush fruits” and “Growing of pome fruits and stone fruits” were aggregated.

It is composed of companies from the Kilikis, Alentejo, Crete and Valencia regions (the regions which identified this segment as a key segment) and from the Emilia Romagna and Murcia regions. About half of these companies are from Valencia and about a third from Kilikis.

- Foods industry machinery + services: 9%.

It covers the “foods industry machinery”, “dosing, wrapping, packaging” and “food logistics”) and includes, in addition to companies from the Murcia Region (43%) and Emilia Romagna (55%, mainly “dosing, wrapping, packaging” companies), companies from the Alentejo region.

- Manufacture of oils and fats: 9%.

Companies from the Valencia region (60%), Crete (9%), the PACA region (17%), the Alentejo region and also from the Murcia region (5%).

- Manufacture of wine and alcoholic drinks: 7%.

The segment is represented in the survey by companies from the Alentejo region (50%), the Kilikis region (9%) and Crete (11%), as expected, and also from the Murcia (27%), Valencia and PACA regions.

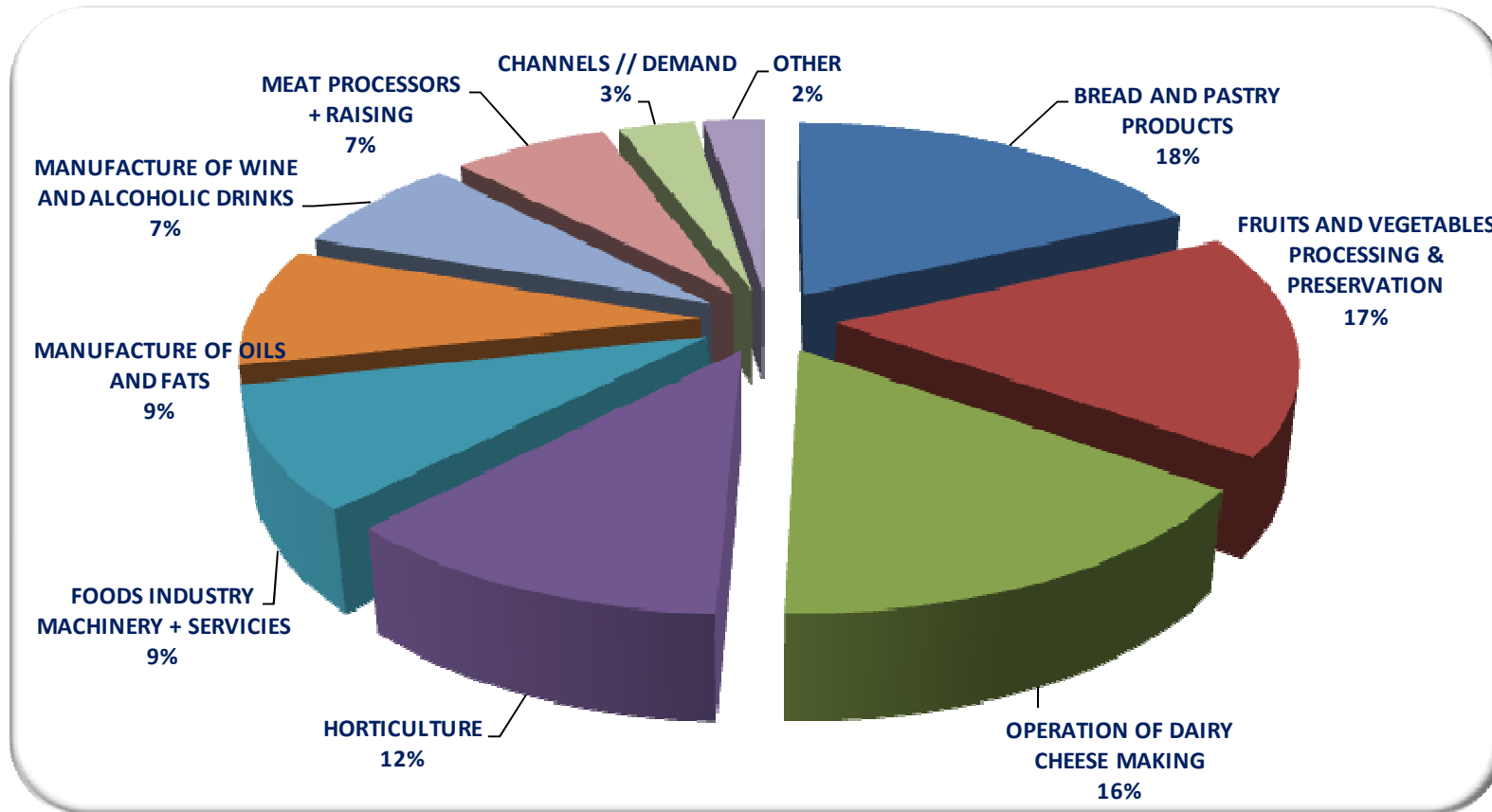
- Animal raising and processing: 7%.

The segment results from the grouping of the “Production of meat and poultry meat products” and the “Raising of sheep and goats and dairy cattle” segments.

While it was identified as a key segment by Cyprus (74% of the sample), it includes companies from the Alentejo (21%) and Murcia regions.

Eventually companies from the channels/demand segment (grouping of the “Agricultural sales representatives”, “Wholesale of agricultural products”, “Retail sale of food, beverages and tobacco”, “Food and beverage service activities”) and from other segments also participated in the survey.

Activity segment



The scope of the survey was eventually broadened, beyond the aforementioned objectives of analysis, to cover the three key competitiveness factors in the activity 3.3, in line with the project objectives:

- Orientation towards foreign markets and internationalization.
- Innovation performance.
- Networking and cooperation with other companies.

Additionally, the survey included questions which intended to a first assessment of cluster conditions in the region of respondents.

While regional reports were elaborated for each project partners, the global report presents the total results of the survey. It is organized in 4 sections, one for each of the above aspects and one on the basic characteristics of companies.

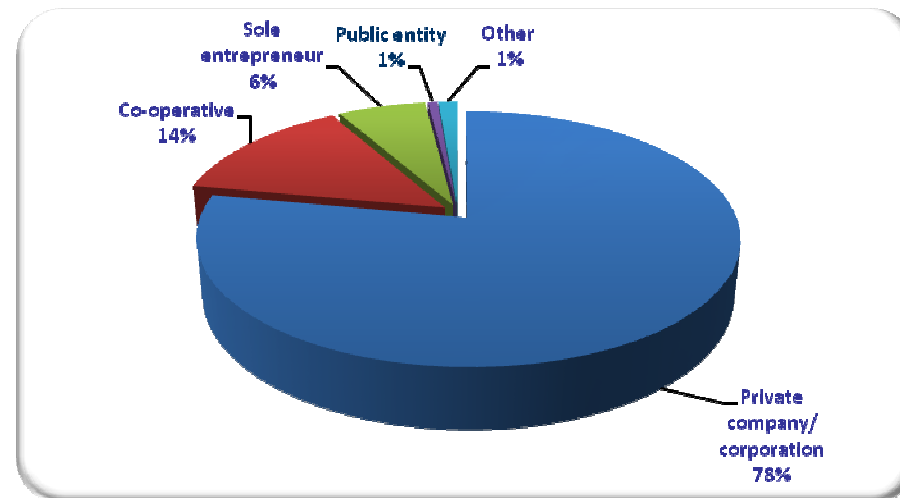
Results are presented at global level and in some cases at segment level.

Basic characteristics of the companies

This section presents the profile of the companies which participated in the survey regarding:

- Legal form.
- Size (turnover and employees).
- Product or process certification.
- SWOT self-assessment on key factors of competitiveness

Legal form



As a survey focused on companies, and SMEs in particular, the results on the legal form of respondents first show that 98% of them are business entities. The remaining 2% (public entities, business or sectorial associations and organizations, R&D entities) are a consequence of the aforementioned difficulties in the survey process.

With 78% of respondents, corporate statutes prevail, while 14% are cooperatives and 6% are sole entrepreneurs.



Size of the companies

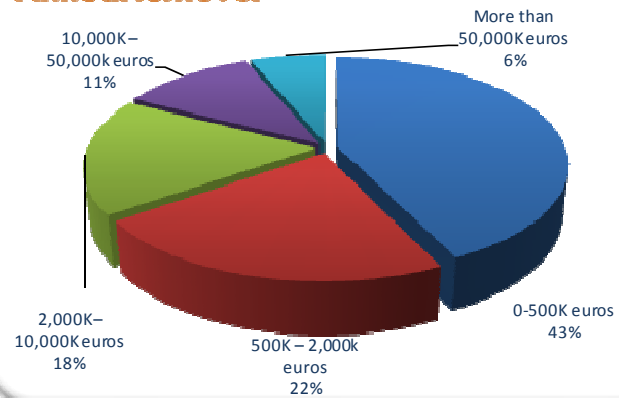
The survey sample consists of a majority of SMEs (90%). Among them, micro companies make up the dominant category (56%).

The no-SME category consists basically of large firms (with a staff of 250 or more and/or with an annual turnover superior to 50 million euros) and non independent companies (with more than 25% of their capital owned by a large company).

As far as the number of employees is concerned, the dominant figure is a company with less than 10 employees (63%). The difference between the share of organizations with less than 10 employees and the share of micro companies is mainly due to the fact of some of these companies have a turnover superior to 2 million euros or are not independent.

The importance of micro companies in the survey sample explains the significant share of respondents with a turnover inferior to half a million euros a year (43%). On the other hand, 17% of respondents have an annual turnover of more than 10 million euros.

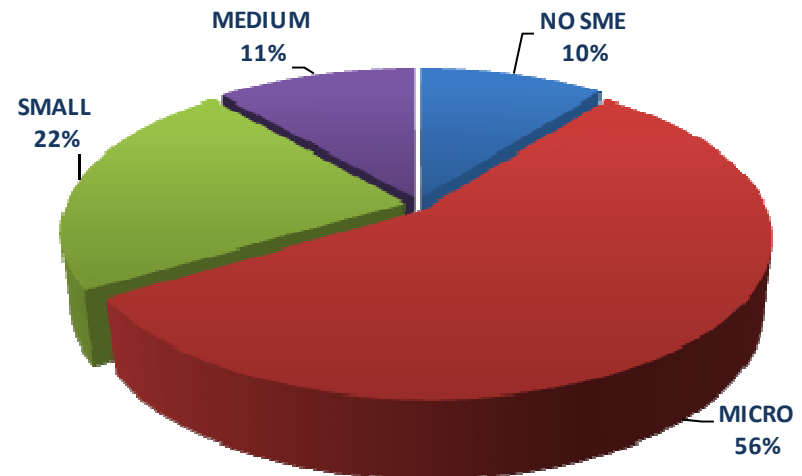
Annual turnover



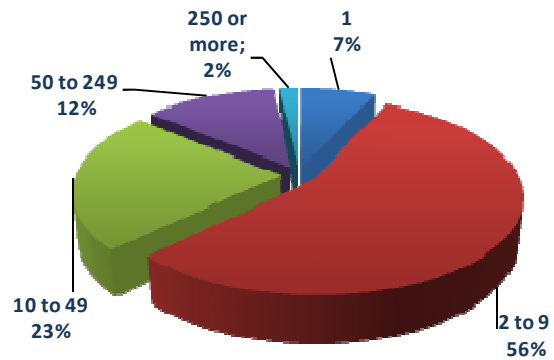
SMEs: 90%

No SMEs: 10%

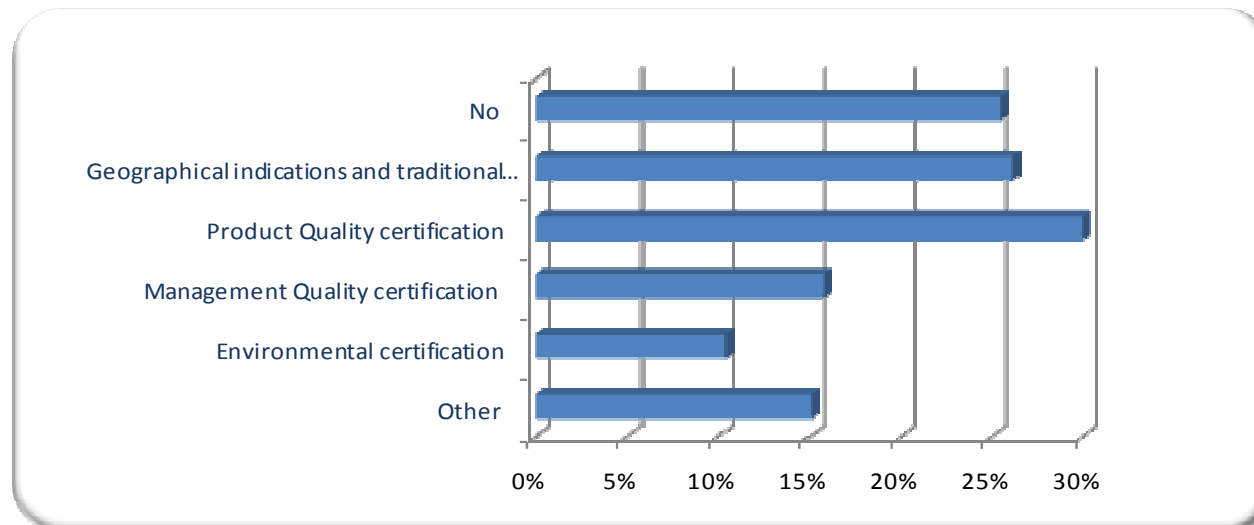
Size of the companies



Number of employees



Certifications



Companies were asked about the kind of certifications under which they were operating: geographical indications and traditional specialities, environmental certification, quality management, etc.

About three quarters (74%) of the companies which participated in the survey operate under one or several types of certifications.

Product quality certifications are the most common among PACMAN’s partner regions, with 30% of respondents. Geographical indications and other certifications of traditional specialties come next (26%).



Management quality (a heterogeneous category which covers a wide range of topics, including client satisfaction and health at the workplace) and environmental certifications concern respectively 16% and 10% of respondents. We may consider that it represents a emergent trend among agro-food operators. Another way to look at it is that it is still a pending issue, especially regarding the environmental challenges.

15% of the companies chose the “Other” category to basically refer to food safety certifications (HACCP: Hazard analysis and critical control points; governmental veterinary checks; ISO 22000, etc) and, in a lesser extent, organic farming certifications.



SWOT on key factors of competitiveness

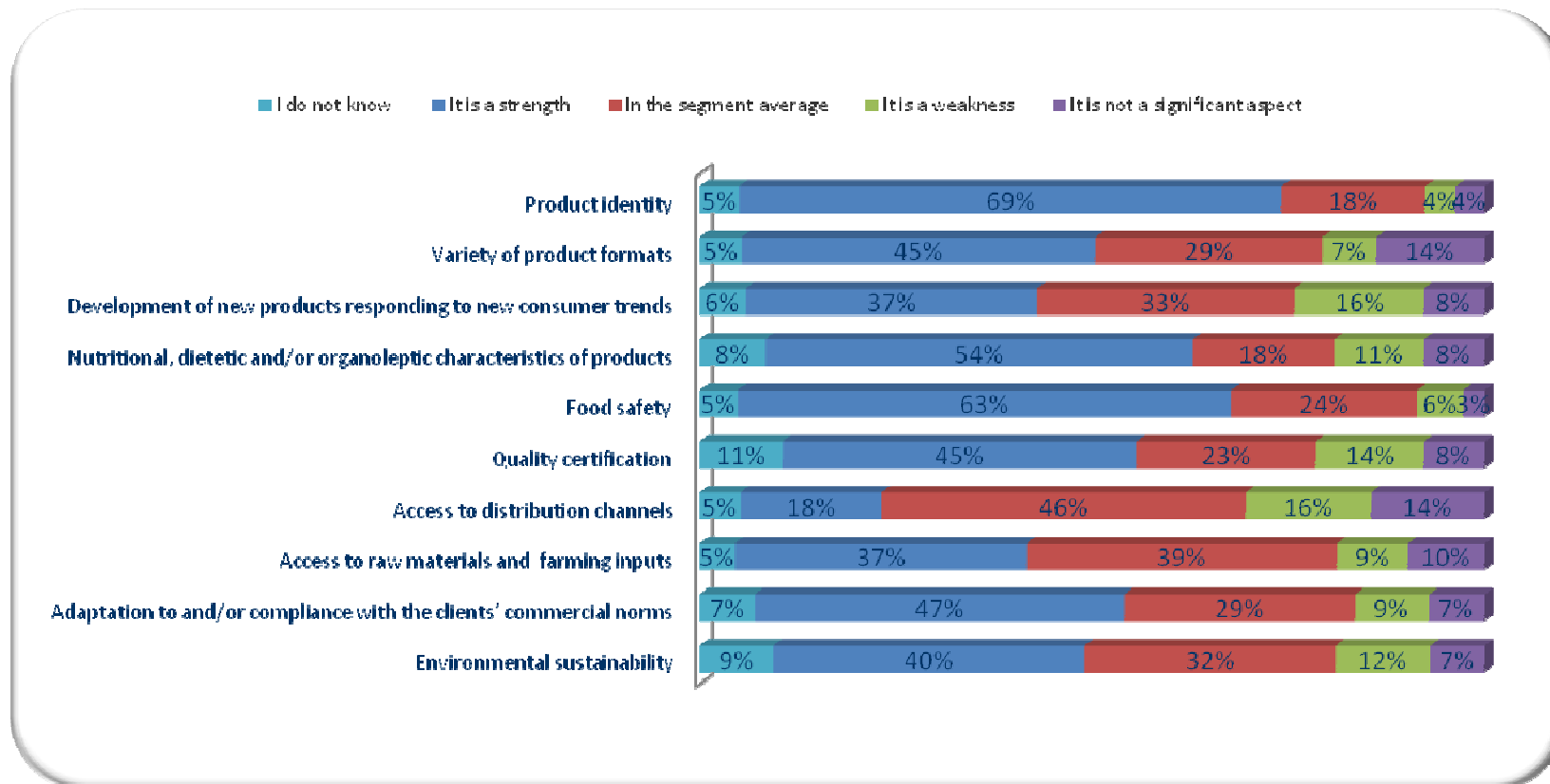
A set of questions invited respondents to a self-assessment of their situation regarding key factors of competitiveness. These factors were defined taking into account the specificities of agro-food economics and the contribution of project partners.

10 factors were finally selected:

- Product identity
- Variety of product formats
- Development of new products as a result of the adaptation to new consumer trends
- Nutritional, dietetic and/or organoleptic characteristics of products
- Food safety
- Quality certification
- Access to distribution channels
- Access to raw materials and farming inputs
- Adaptation to and/or compliance with the clients' commercial norms
- Environmental sustainability

Respondents had the possibility to qualify each of these factors as a strength, a weakness, a feature developed in the same extent as the rest of the operators in their segment or a irrelevant aspect regarding their activities. A last choice was the "I don't know" answer.

SWOT on key factors of competitiveness



The main finding is that product identity emerges as the main distinctive feature of partner regions' agro-food sector, as a vast majority of respondents (69%) identified this aspect as a particular strength. Regarding this, it may be interesting to explore in which extent this product identity is associated to the common Mediterranean area, culture and diet according to the partner regions.

The nutritional, dietetic and/or organoleptic characteristics of products and food safety are also aspects which are underlined as strengths by a majority of respondents.

None of the proposed factors has been considered as a weakness by a majority of respondents (or by a higher share of respondents compared to those who have pointed them out as a strength). We can however mention the cases of the development of new products (a weakness for 16% of respondents and a strength for "only" 37% of them) and the access to distribution channels (16% vs. 18%).

Eventually, the variety of product formats and the access to distribution channels were considered as an insignificant aspects of their activity by 14% of respondents each. Most of companies in this case certainly are related to B2B activities or produce "basic" products such as farming inputs.

Internationalisation level

This section deals with the issue of internationalisation, more specifically with the current situation of companies regarding it.

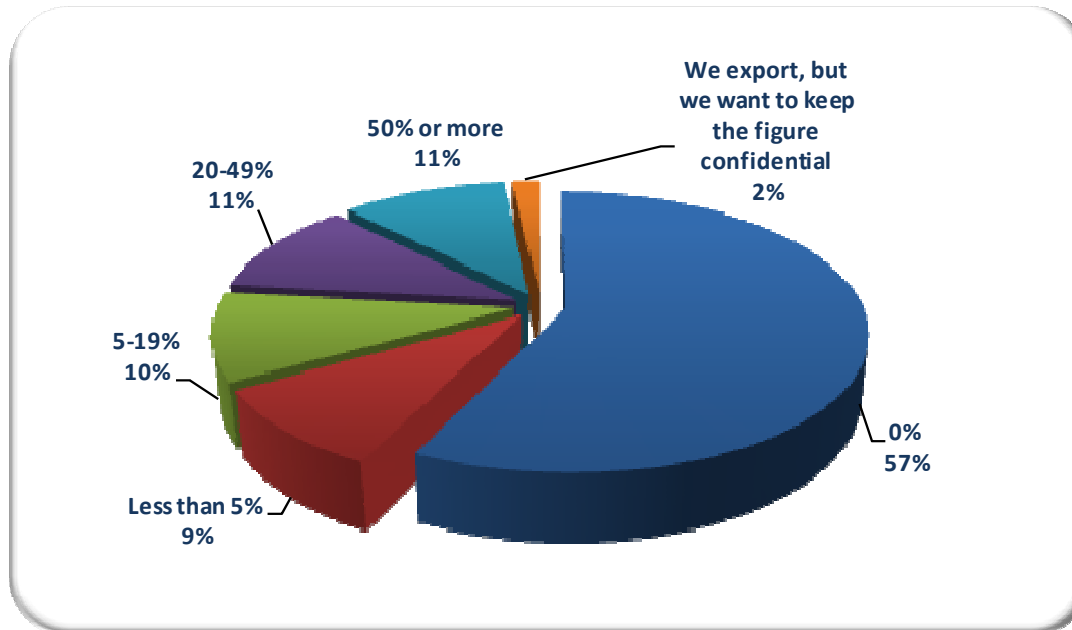
Internationalisation is here understood in its traditional dimension: focus on sales and purchases made by companies on foreign markets.

The survey covered three key aspects of internationalisation:

- Share of international sales
- Geographic market
- Origin markets from inputs

The global report also analyzes possible correlations between the level of international sales and companies' strengths.

Share of international sales



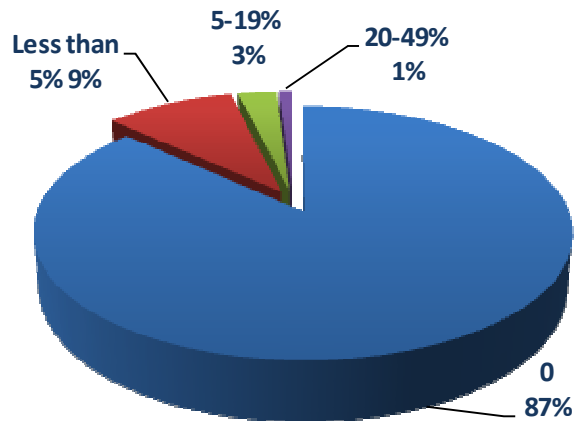
The survey reveals that internationalization is globally still a pending challenge among PACMAN partner regions' agro-food sector. A bit more than half of companies do not export, while international sales are almost marginal for 9% of them.

Meanwhile they represent a significant dimension of activity for 22% of respondents (20% of annual turnover or more).

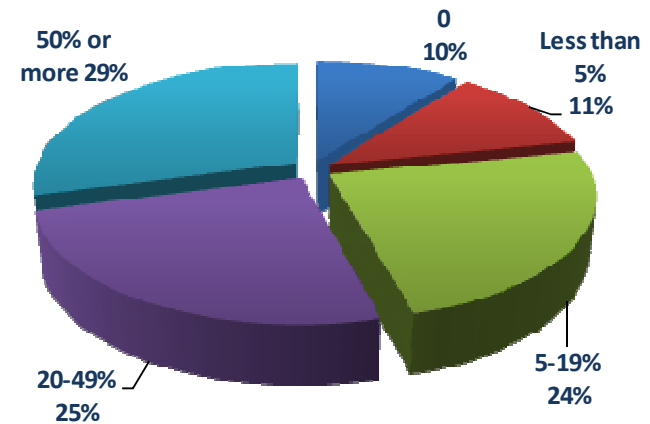
There are obviously differences between the agro-food segments (see specific results in the following pages) and among partner regions. While the results from the Murcia region and, in a lesser extent from the Emilia Romagna and Provence-Alpes-Côte d'Azur regions, underline an advanced state of internationalization, agro-food companies from the Kilikis region and Cyprus display a lower level of international sales than the general trend.

Share of international sales

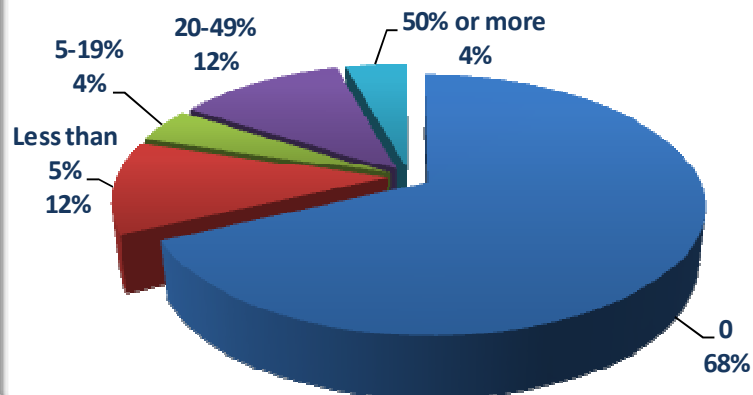
Bread And Pastry Products



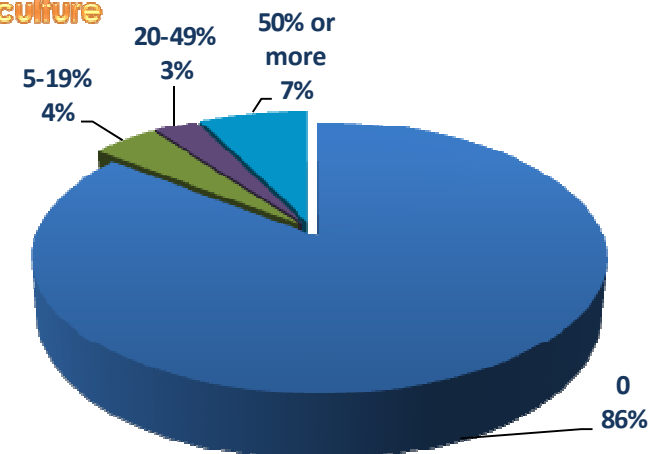
Fruits and Vegetables processing & preservation



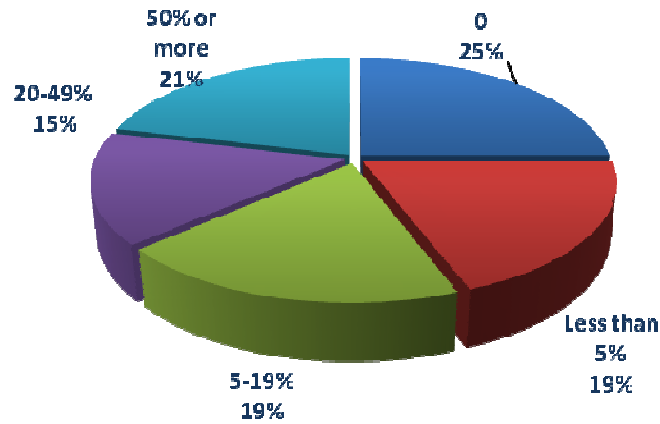
Operation of Dairy Cheese Making



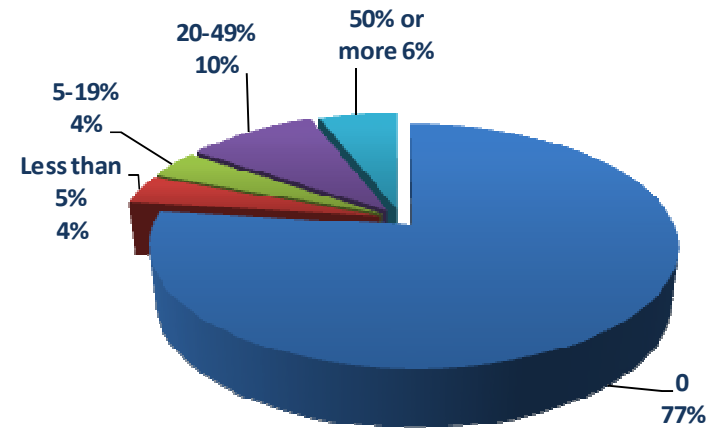
Horticulture



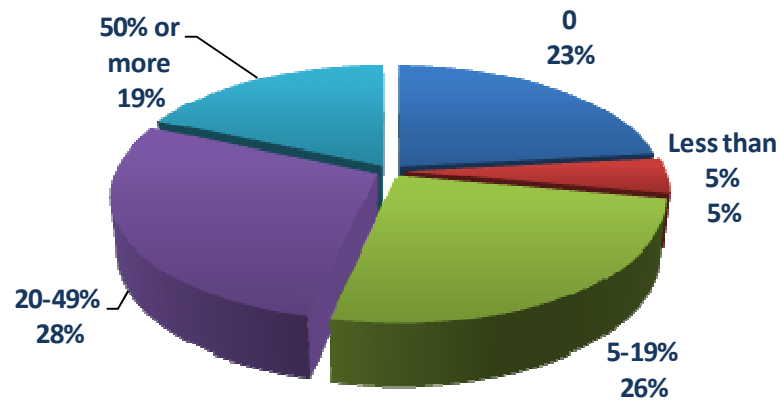
Foods Industry Machinery + Services



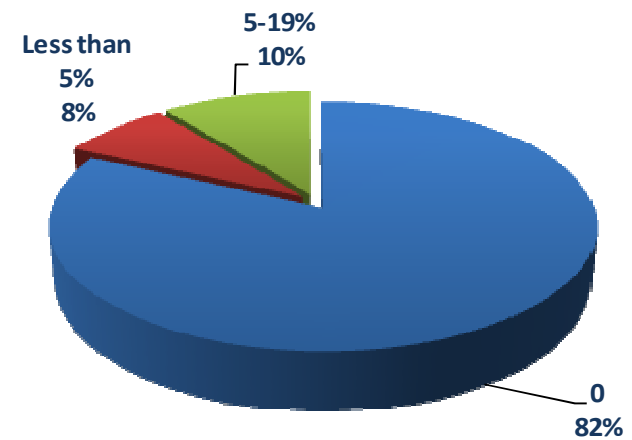
Manufacture of oils and fats



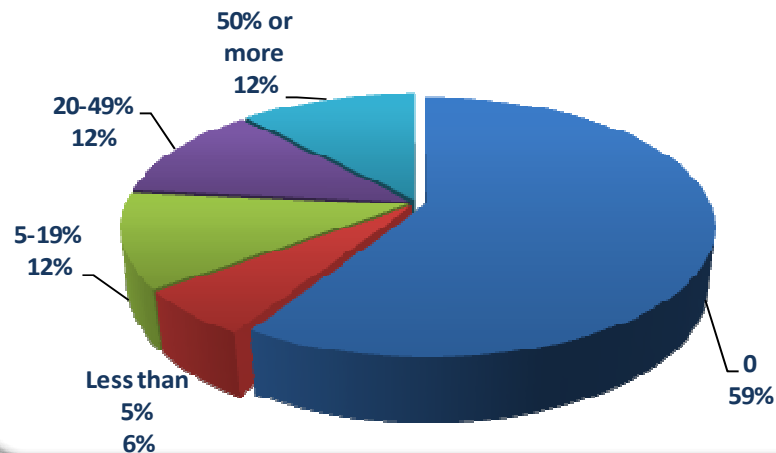
Manufacture of wine and alcoholic drinks



Animal raising and meat processing



Channels // Demand



The results by agro-food segment offer various findings.

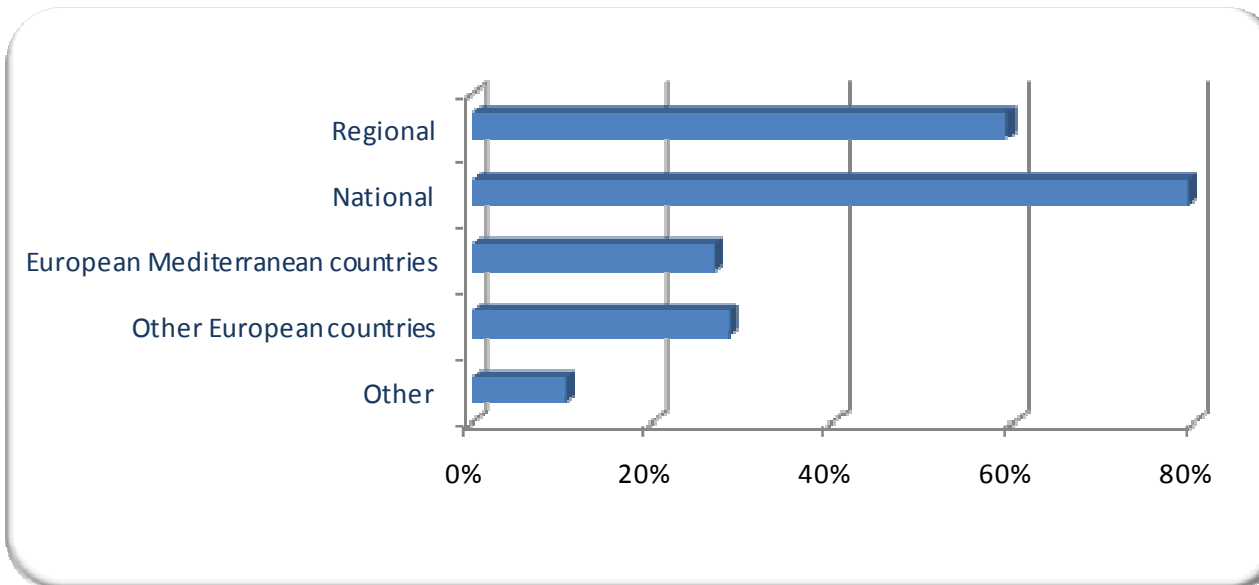
Three segments appear as particularly oriented towards exports:

- “Fruits and vegetables processing and preservation”: 54% of companies with international sales above 20% of annual turnover, 10% of companies which do not export.

- “Foods industry machinery and services”: 54% of companies with exports above 5% of annual turnover, 36% over 20%.
- “Manufacture of wine and alcoholic drinks”: about three quarters of companies with more than 5% of annual turnover achieved abroad, 37% over 20%.

The other segments are characterized by a vast majority of companies with no exports, until three quarters of them or more in the “horticulture” (86%), “manufacture of oils and fats” (77%) “bread and pastry products” (87%) – result also due to the weight of Valencia in these segments: 0% exports – and “animal raising and meat processing” (82%) segments, with however the presence of a minority of highly internationalized operators , especially in the case of the “horticulture”, “operation of dairy cheese making”, “manufacture of oils and fats” and “channels/demand” segments.

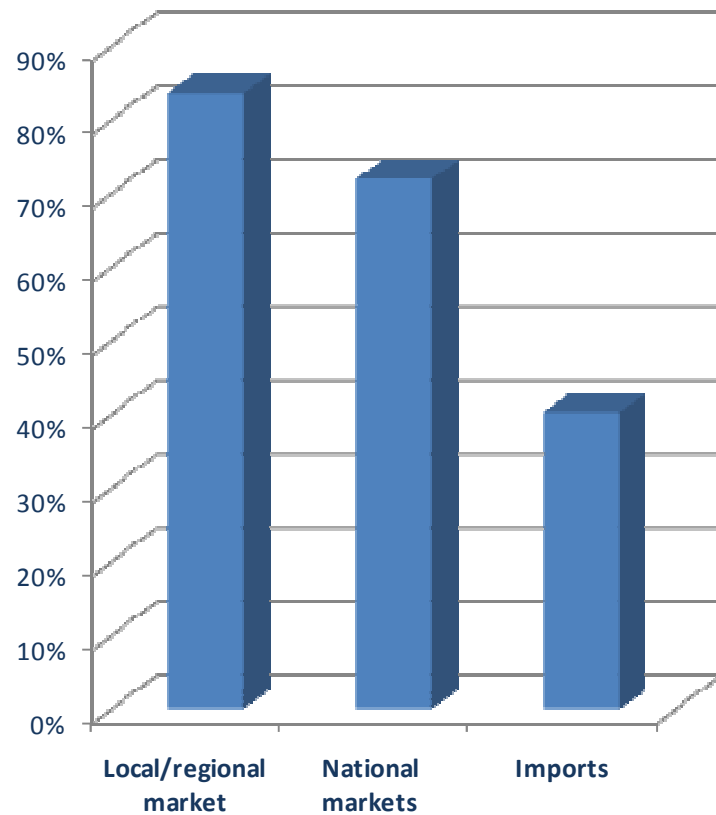
Geographic market



The global results of the survey question about the geographic markets of companies highlight the dominance of European markets: 27% of respondents sell their products or services in European Mediterranean countries (with France, Spain and Italy as the main markets) and 29% in other European markets, such as Germany, the UK, Benelux and Scandinavian countries, Finland, Austria or Poland. Only 10% operate beyond European borders, principally in the US, Canada, Russia, Australia, Japan, China, Maghreb and Mashrek countries.

Another finding is that 12% of respondents declared that they only operate at regional level.

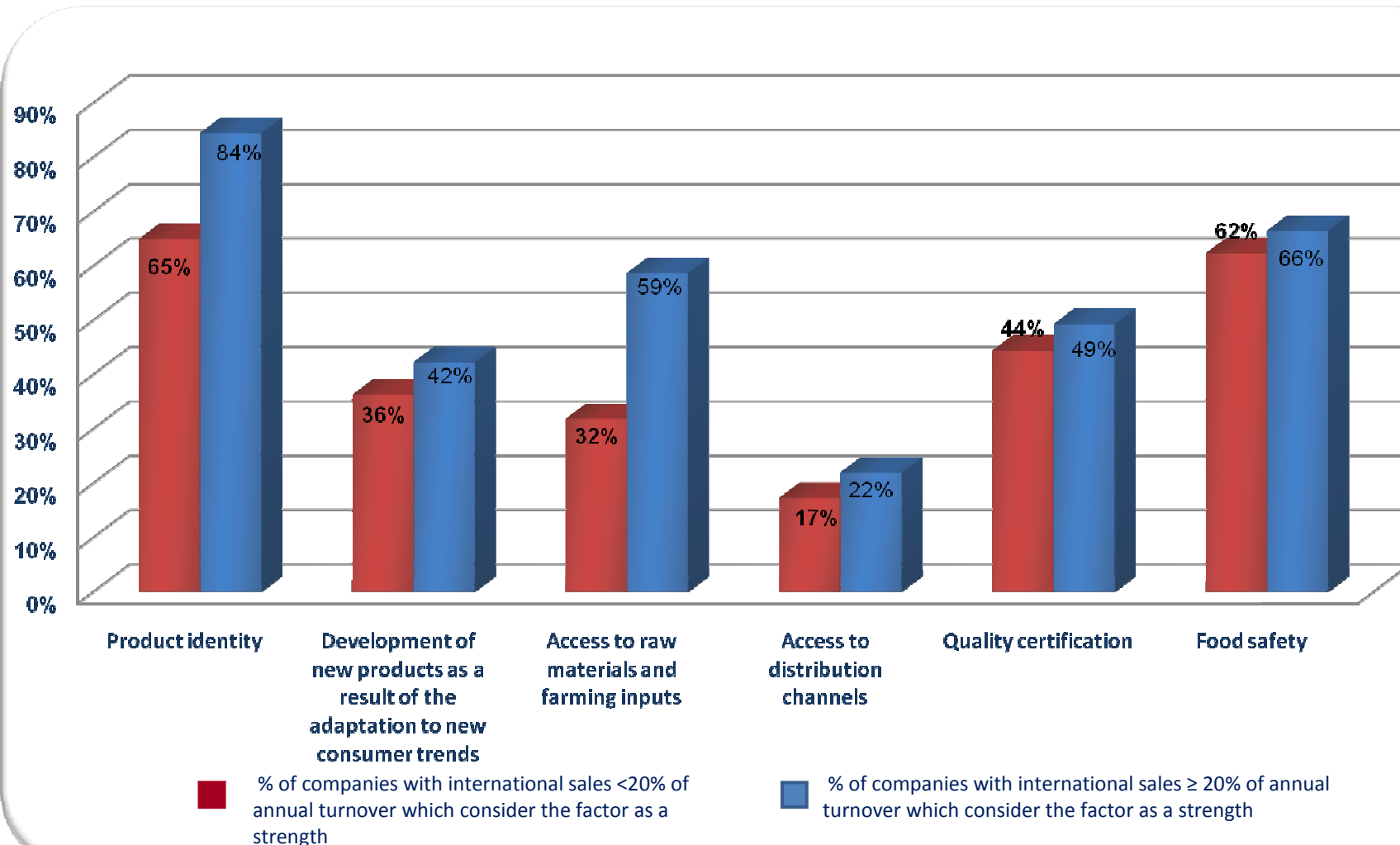
Origin markets from inputs



Globally, agro-food companies combine various markets for inputs purchase, with however one third of respondents mention only one level and about 25% the regional level.

In this situation, a clear hierarchy is highlighted by the survey, with an decreasing importance of the market when we “climb” the geographic scales. The local/regional (of special relevance in cases of products covered by a geographical indication) and national markets dominate, with respectively 84% and 70% of respondents, while 40% of them make imports. Importing is a practice observed with most frequency in “large” domestic markets: Murcia region (Spain), PACA (France) and Emilia Romagna (Italy).

Correlations strengths/degree of internationalization



As part of the global exploitation of the survey results, an analysis has been carried out about possible correlations between companies' strengths and the degree of internationalization, expressed by the share of international shares in the annual turnover. This exercise has obvious limits as we are dealing with strengths in the very companies' view, with accordingly a strong dimension of subjectivity. It was however considered that it could provide material for a deeper reflection about the critical factors for internationalization and/or the impact of the international sales over the companies' capacities. Indeed, the interpretation of the correlations can go in both directions: the excellence or singularity in key competitiveness factors enhance the ability to successfully internationalize, while the objective of business development abroad makes necessary to improve on these factors.

The analysis basically consisted in comparing two categories of companies in their identification of strengths: companies which international sales inferior to 20% of annual turnover ("internationalized companies") and companies with international sales equal or superior to 20%.

The results show positive correlations on some of the 10 competitiveness factors which were included in the survey question dealing with the self SWOT assessment. Basically, as the previous chart shows, internationalized companies recognize the following aspects as strengths more than other companies do: product identity (+19%), development of new products as a results of the adaptation to a new consumer trends (+6%), access to raw materials and farming inputs (+27%), access to distribution channels (+5%), quality certification (+5%) and food safety (+4%).

Innovation level

Innovation is another key factor of competitiveness which has been identified in the PACMAN project.

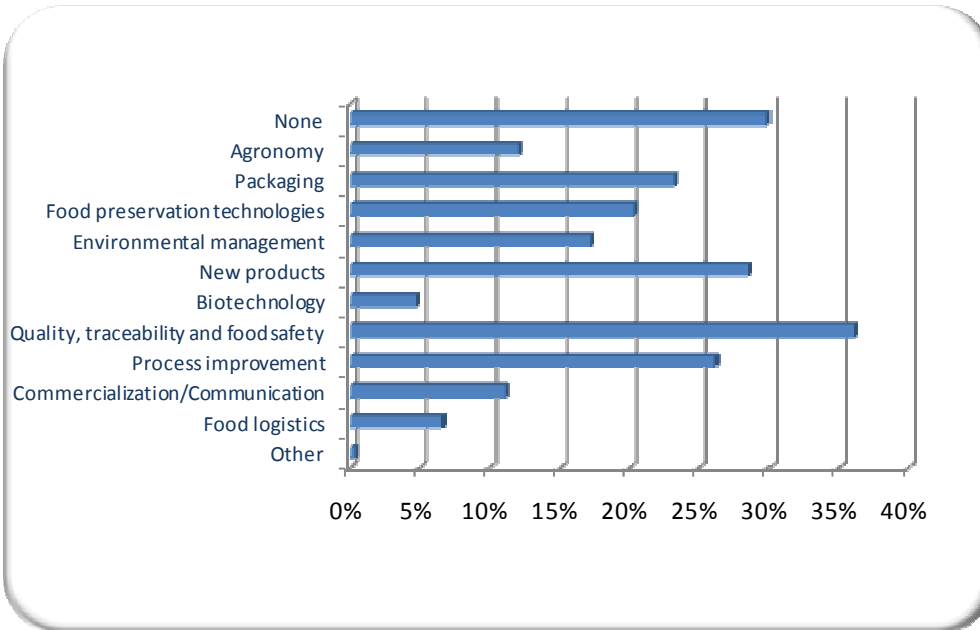
In the survey, innovation was addressed with the following definition: investments in material or immaterial assets, hiring of specialized staff , or purchase of advanced services in relation with technological and non-technological R&D&i.

The survey covered three key aspects of innovation:

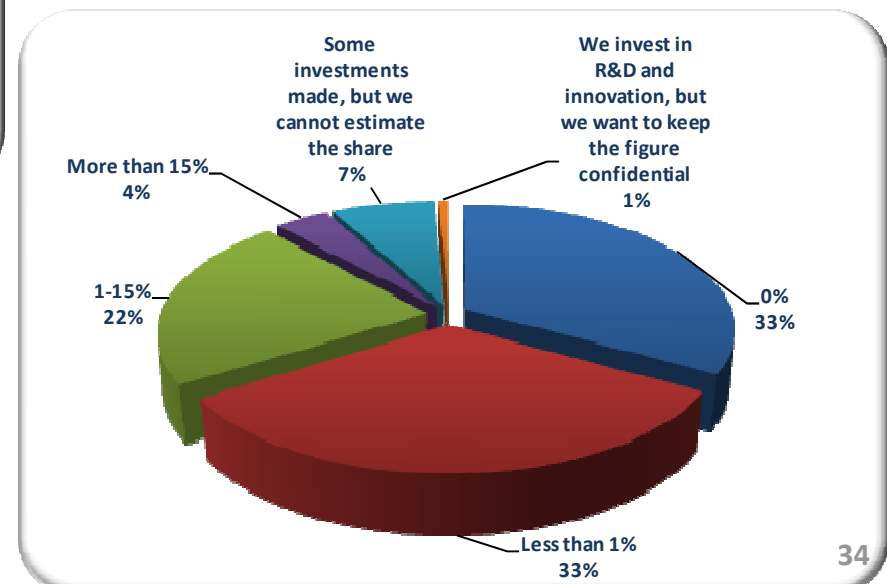
- Volume of investments.
- Areas of innovation.
- Collaboration with other entities.

The global report also analyzed possible correlations between the level of investments in R&D&i and companies' strengths

Innovation Areas



Average share of annual turnover invested in R&D&i



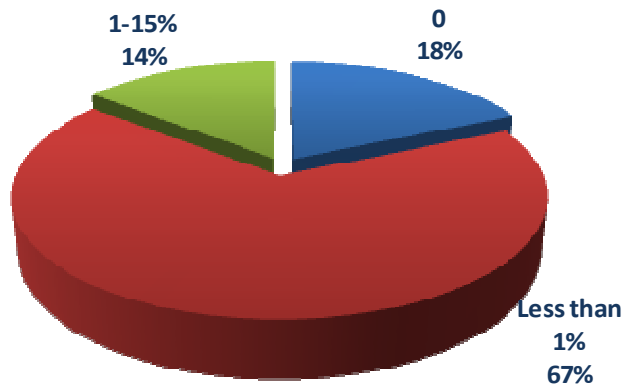
According to the survey, R&D&i activities concern a significant share of PACMAN partner regions' agro-food operators, as the two thirds of respondents declared that they invested money in these activities. However, they seem to have reached a strategic dimension (which can be expressed by the volumes invested) for fewer companies: another third of respondents dedicate less than 1% of their average annual turnover in R&D&i. These global results hide contrasts between partner regions (see regional reports) and agro-food segments (see following pages).

As far as the innovation topics are concerned, we observe that a range of hot topics among those which were suggested to respondents, although every topic got a number of answers. These hot topics, potentially key areas to focus on as part of future collaborations between project partners, are:

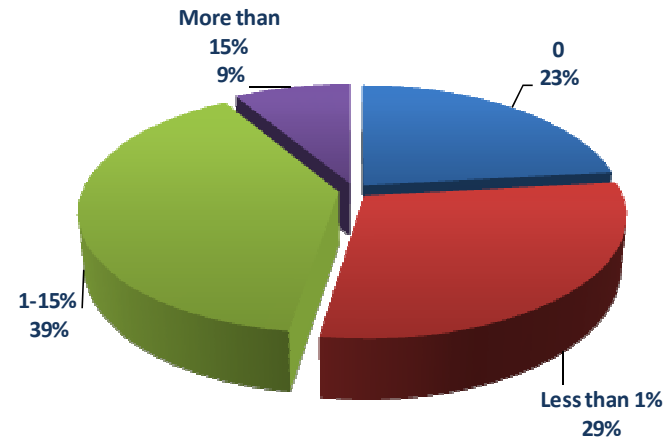
- Quality, traceability and food safety (36% of respondents);
- Development of new products (28%);
- Process improvement (26%);
- Packaging (23%).

Average share of annual turnover invested in R&D&i

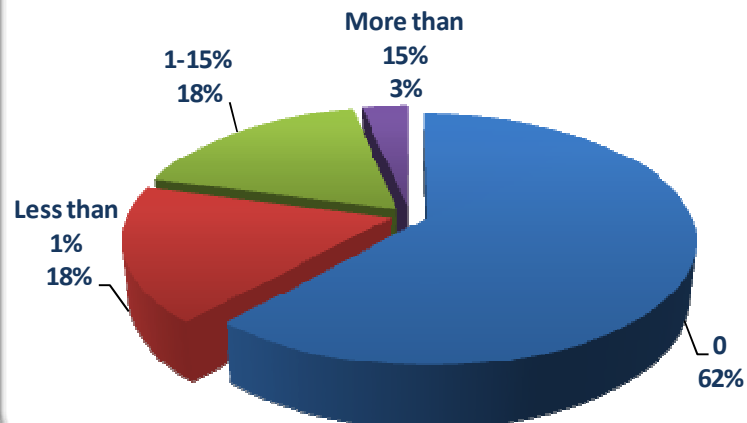
Bread And Pastry Products



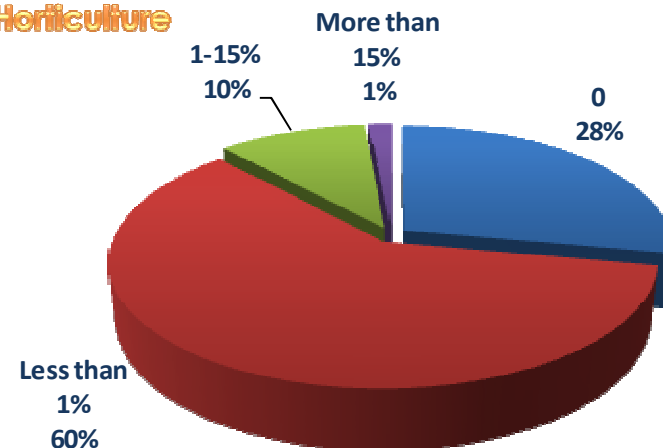
Fruits and Vegetables processing & preservation



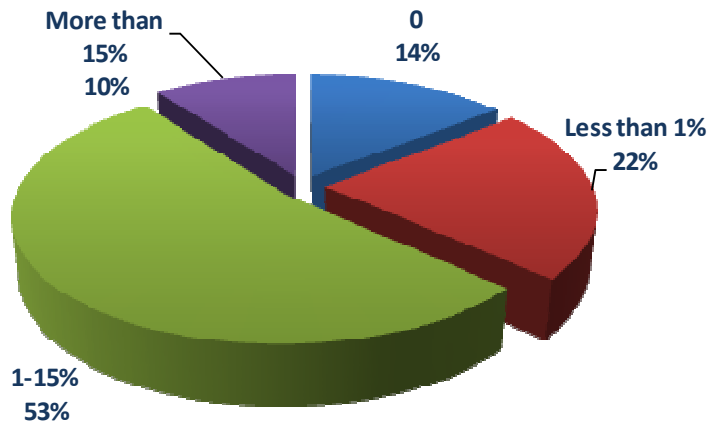
Operation of Dairy Cheese Making



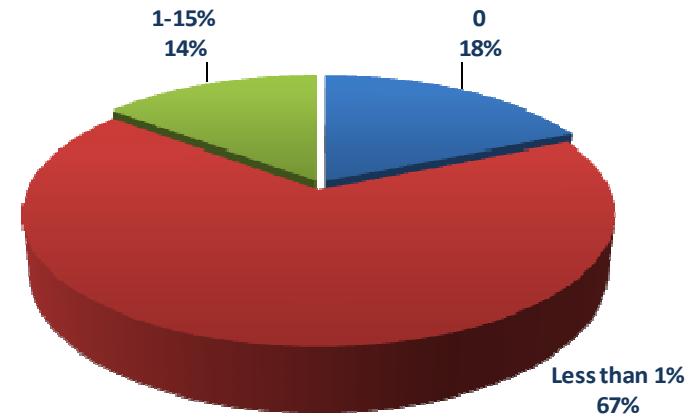
Horticulture



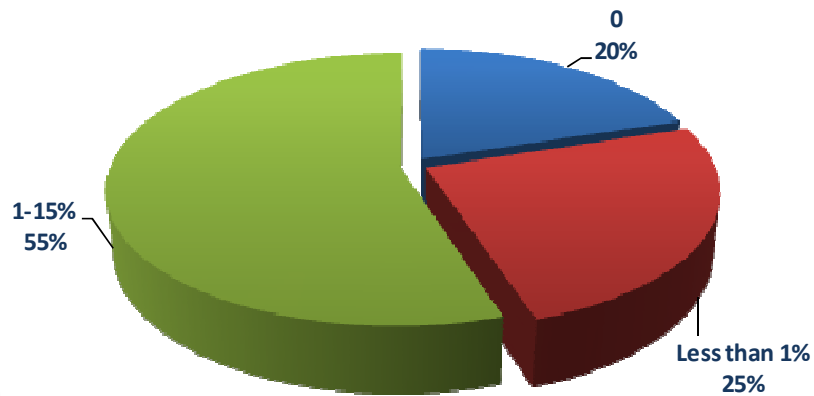
Foods Industry Machinery + Services



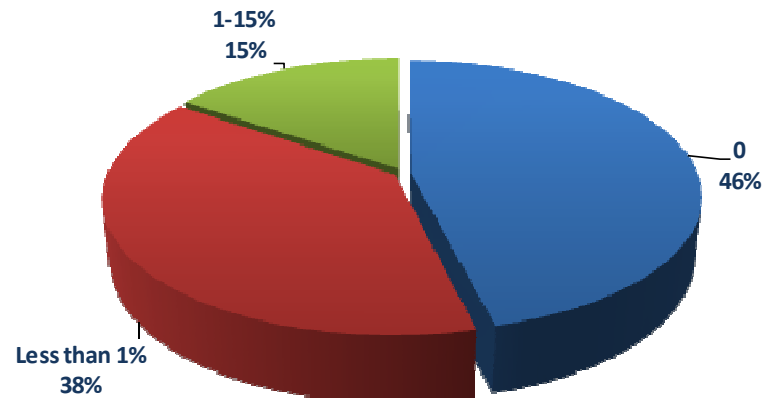
Manufacture of oils and fats

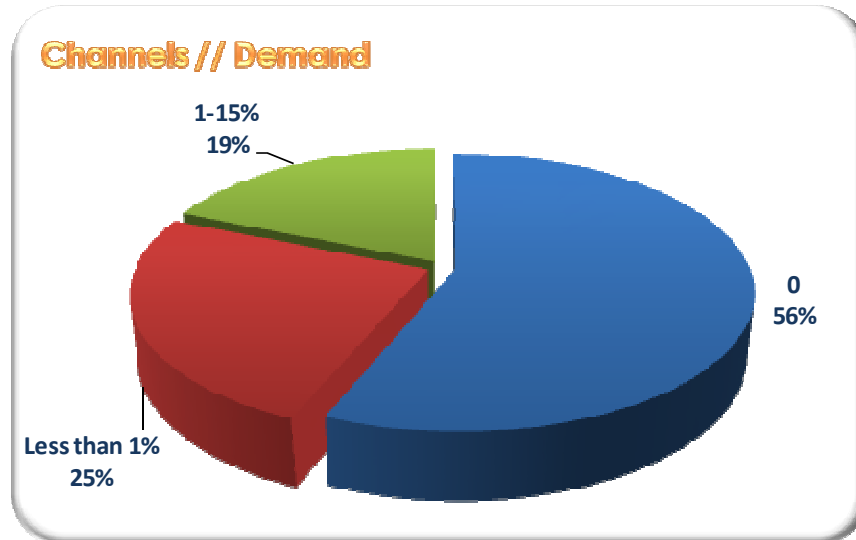


Manufacture of wine and alcoholic drinks



Animal raising and meat processing





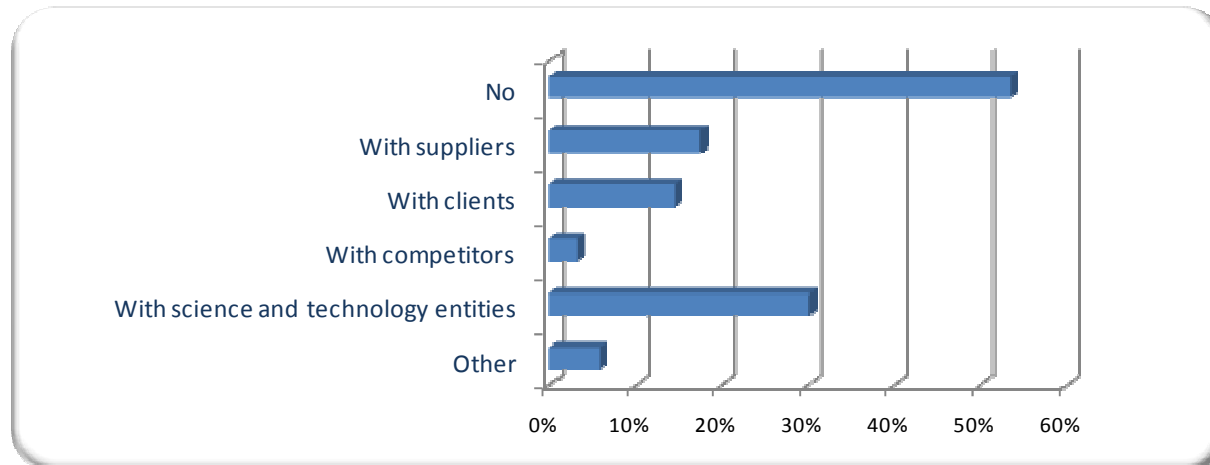
Three groups of agro-food segments can be distinguished according to the average share of annual turnover invested in R&D&i activities:

- “Fruits and vegetables processing and preservation”, “food industry machinery and services” and “manufacture of wine and alcoholic drinks”: more than three quarters of the companies have innovation expenditure and more than half have

investments which exceed 1% of annual turnover. These segments are also those with the most international profile, another input for the reflection about the factors/impacts of internationalization (see page 29).

- “Bread and pastry products”, “horticulture”, “manufacture of oils and fats”: more than three quarters of the companies have innovation expenditure, but most of them do not spend more than 1% of their average annual turnover.
- “Operation of dairy cheese making”, “animal raising and meat processing”, “channels/demand”: about half of operations or more do not invest in R&D&i activities and less than a quarter spend more than 1% of their average annual turnover.

Collaboration with others entities

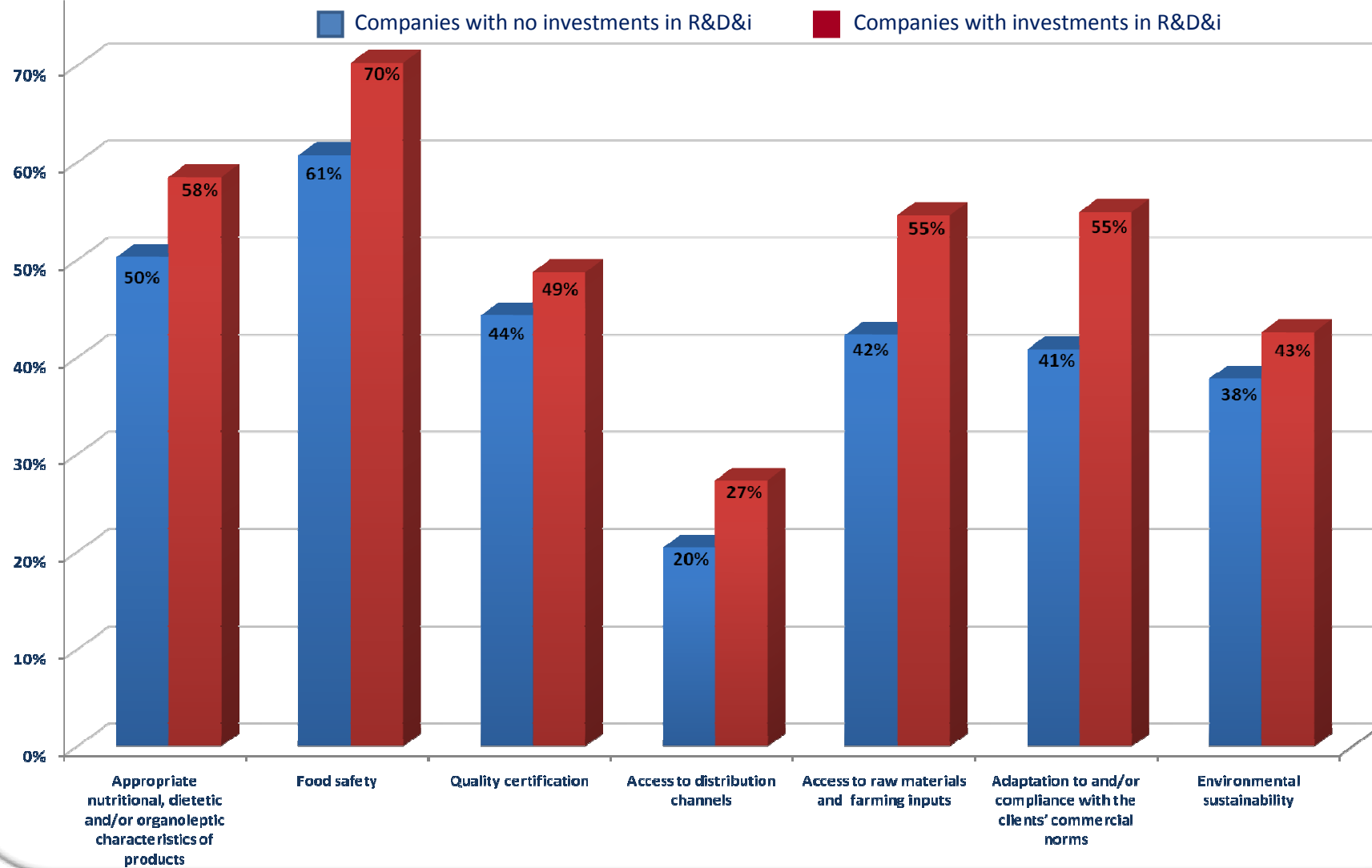


According to global results, collaboration on R&D&i activities is a widespread formula between innovative companies: 70% of them (47% of respondents) declared having collaborated with other entities to carry out their R&D&i activities.

Science and technology entities emerge as the main partners for companies (46% of innovators, 30% of respondents), a result which can be viewed as an argument of the case for cluster development. Suppliers and clients come next (respectively 26% and 22% of innovators). Cooperation between competitors is scarce, concerning 5% of innovators (co-opetition requires a change of mentalities and time).

A minority of respondents also indicated other types of collaborators such as external consultants or sectorial organizations.

Correlations strengths/share of R&D&i investments





Innovation expenditure, like international sales, has been used to look for possible correlations with companies' strengths. The objective is the same, with however a "one-way reading": identifying possible impacts of R&D&i activities over the companies' capacities in key competitiveness factors.

A comparison was made between two categories of companies in their identification of strengths: companies with investments in R&D&i and companies with no investments in R&D&i.

The results show positive correlations on 8 of the 10 competitiveness factors which were included in the survey question dealing with the self SWOT assessment. Innovators recognize the following aspects as strengths more than other companies do: adaptation to and/or compliance with the clients' commercial norms (+14%), access to raw materials and farming inputs (+13%), food safety (+9%), dietetic and/or organoleptic characteristics of products (+8%), access to distribution channels (+7%), quality certification (+5%), environmental sustainability (+5%).

Cooperation

Networking

Participation of the company in intercluster activities

This part focuses on companies inclination and preferences regarding future intercluster activities, as well as the kind of support they would require.

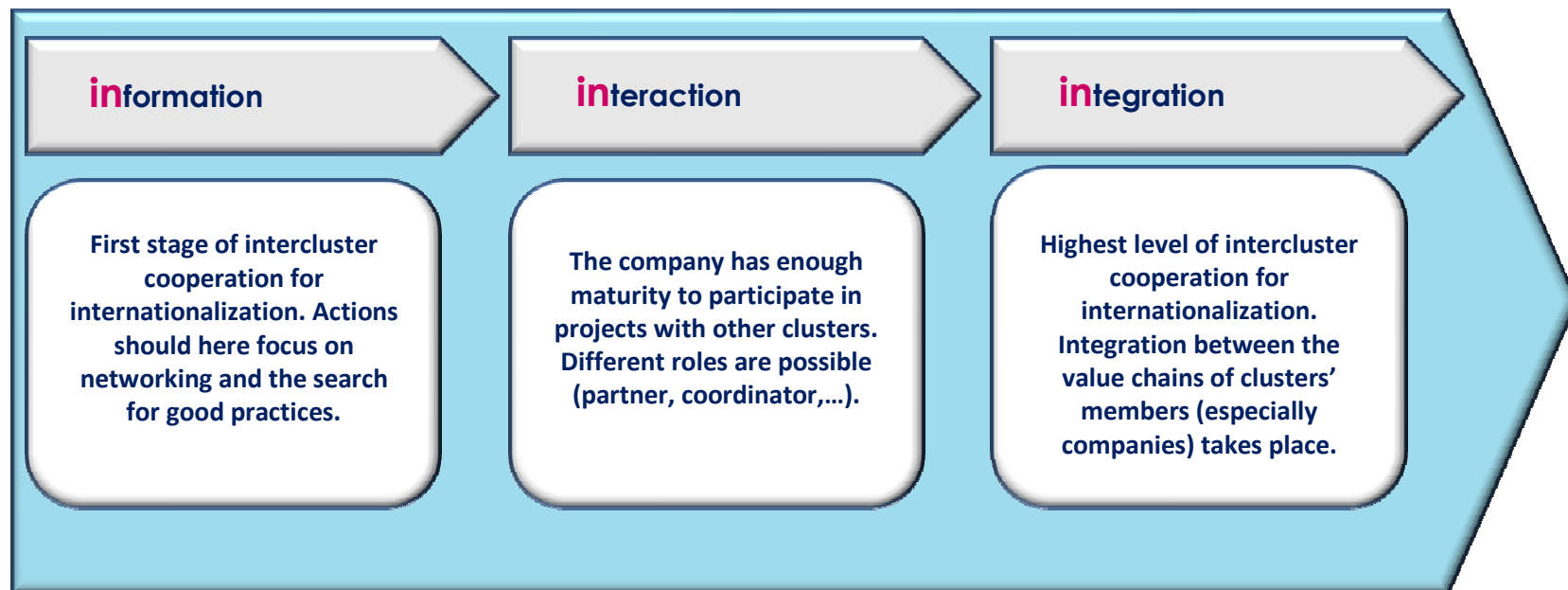
The section starts with an assessment of companies regarding “intercluster cooperation stages”, which correspond to various levels of intercluster development, connecting objectives and types of initiatives. Results are presented at sample level (total results) and by segment in the global report, and at regional level in each partner’s regional report.

As far as the fields of cooperation are concerned, a question pointed directly to issues for intercluster cooperation, with a range of activities proposed in the perspective of value chain integration.

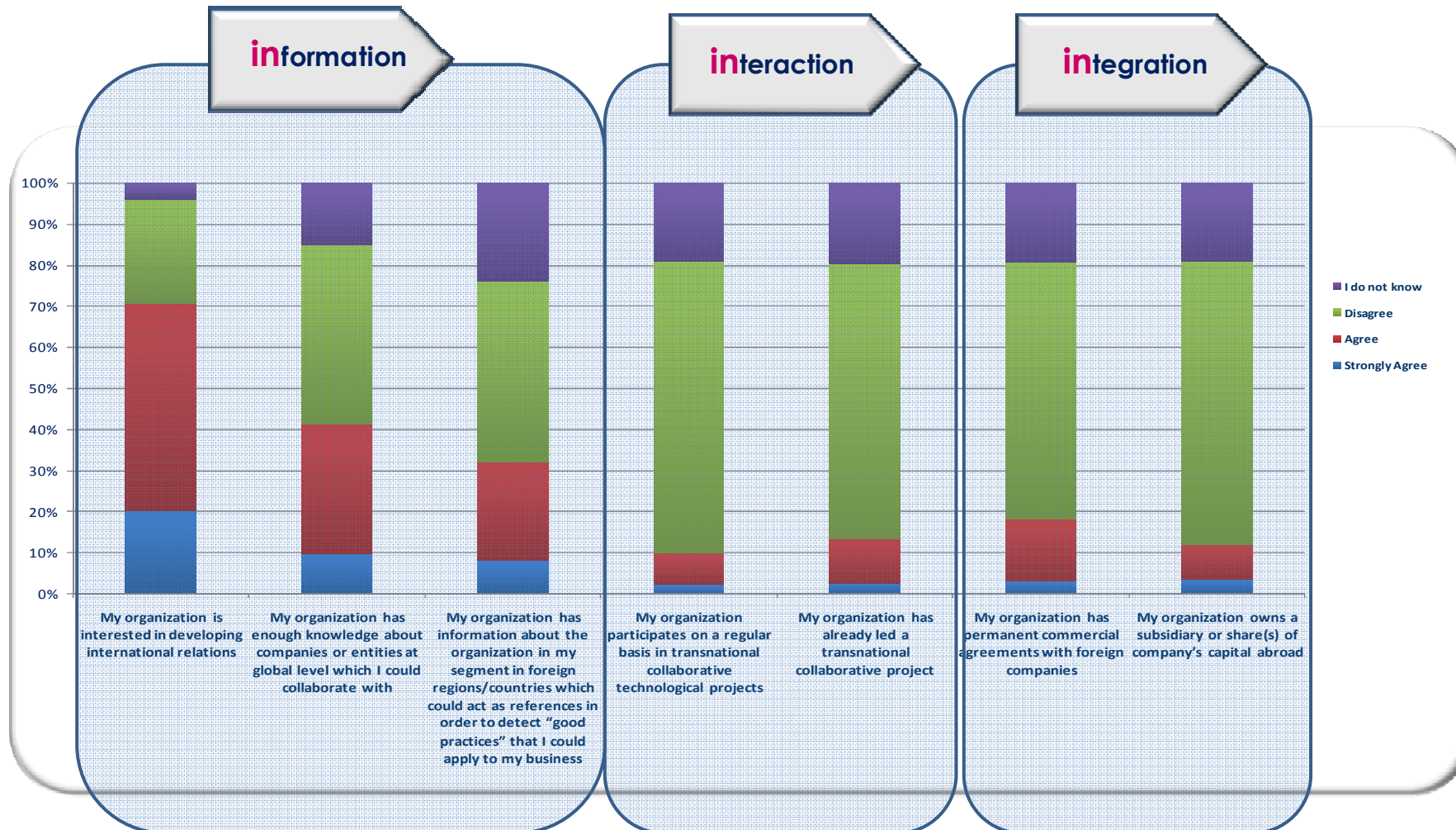
The section closes with the results on the type of support companies would require for these activities and the countries of special interest.

Intercluster cooperation stages

There is a diversity of situations among companies in a same region regarding the stages of intercluster development. The aim of this question is to establish their individual position in each one of these stages, a result of their maturity and their path in terms of internationalization. From less to more advanced, three stages of intercluster development have been defined: information, interaction and integration.



Intercluster cooperation stages



In order to assess the situation of companies regarding intercluster cooperation and their distribution between the three stages, a set of questions was designed so as to focus on representative aspects on each stage. As far as the “information” stage is concerned, three questions dealt with the company’s interest in developing this kind of relations and the current knowledge of foreign entities to cooperate with. Regarding the “interaction stage”, the questions focused on the participation or coordination of transnational collaborative projects. Eventually, the existence of permanent commercial agreements with foreign companies or the participation in foreign undertakings were the key aspects related to the “integration stage”.

The general picture given by the results from all companies from the various partner regions shows agro-food segments in an **early stage of intercluster cooperation (information phase)**. 74% of the respondents declare themselves interested in developing international relations and 53% state that they already know foreign entities they could work with and/or have already identified good practices they could apply to their own business. They are much fewer companies which have reached the following phases. The “interaction” phase only concerns 14% of respondents. More companies actually find themselves in the integration phase (19%): 17% maintain permanent commercial agreements with foreign companies and 8% own a subsidiary abroad or a stake in an foreign undertaking. It reflects some kind of traditional trend in which advanced internationalization, beyond exporting, is focused on direct commercial objectives.

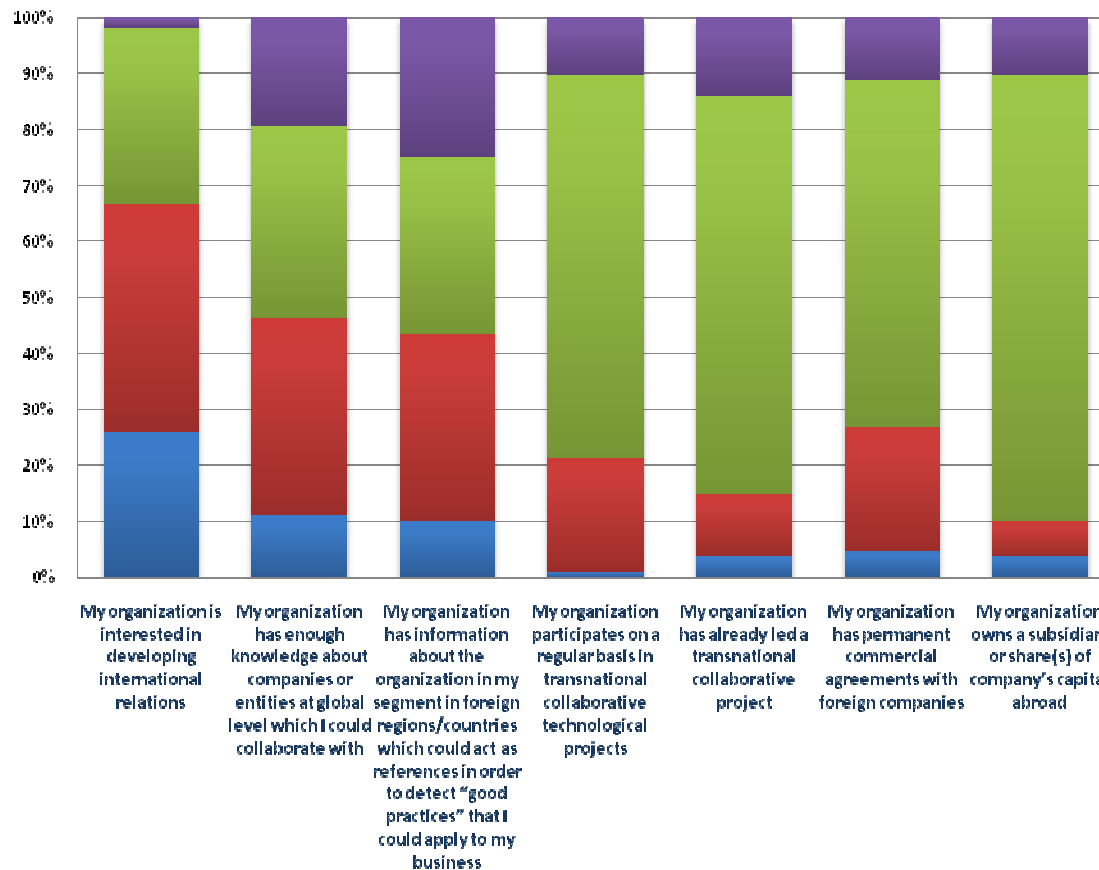
This general picture reflects in some extent the situation in every partner region: agro-food sectors/clusters in the information phase of intercluster cooperation. Differences are rather insignificant, with the exception of the most advanced situation in the Parma province.

Results by segments offer some findings which may result useful in the perspective of future initiatives to support collaboration between companies from different partner regions:

- High interest in developing international relations in most segments, with the relative exception of the “bread and pastry products” (67%) and demands/services (38%, a segment which is not among the key agro-food segments of partner regions).
- Lack of awareness of potential partners and references, especially within the “horticulture” segment.
- Existence of a number of companies familiar with the participation and the coordination of transnational collaborative projects, especially in the “bread and pastry products”, “fruits and vegetables processing & preservation”, “horticulture” segments.
- Existence of companies active in international commercial agreements and foreign investment within the “bread and pastry products”, “fruits and vegetables processing & preservation”, “operation of dairy cheese making”, “horticulture” segments and, in a lesser extent, in the “foods industry machinery” and “manufacture of wine and alcoholic drinks” segments.

Intercluster cooperation stages

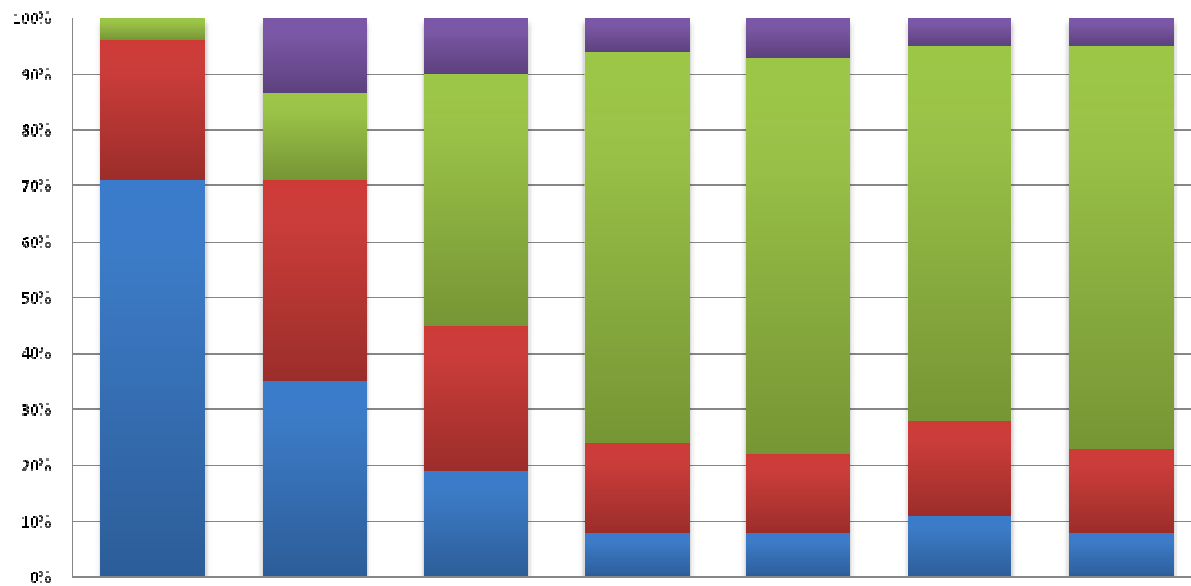
Bread And Pastry Products



■ I do not know
 ■ Disagree
 ■ Agree
 ■ Strongly Agree

Intercluster cooperation stages

Fruits and Vegetables processing & preservation



I do not know

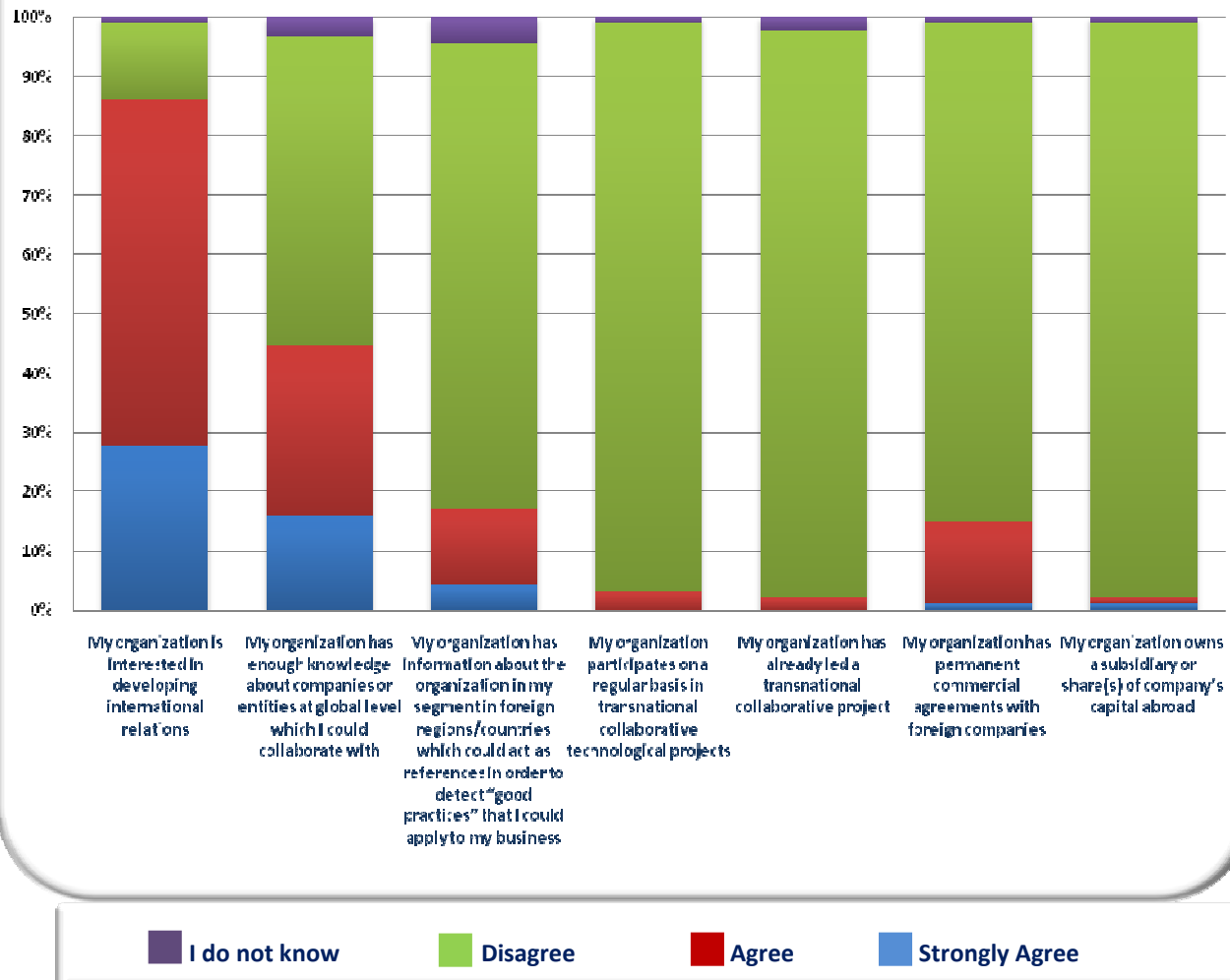
Disagree

Agree

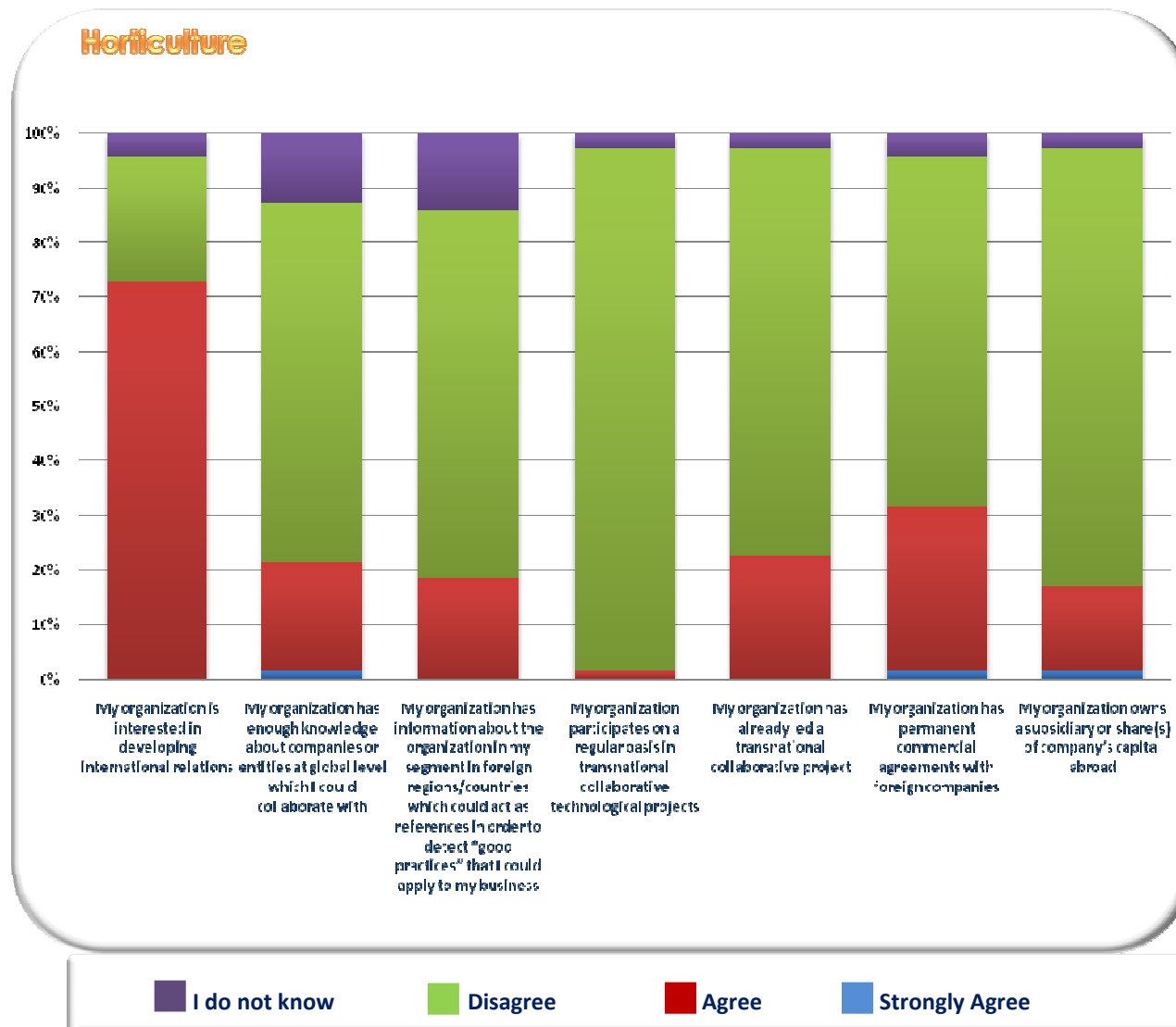
Strongly Agree

Intercluster cooperation stages

Operation of Dairy Cheese Making

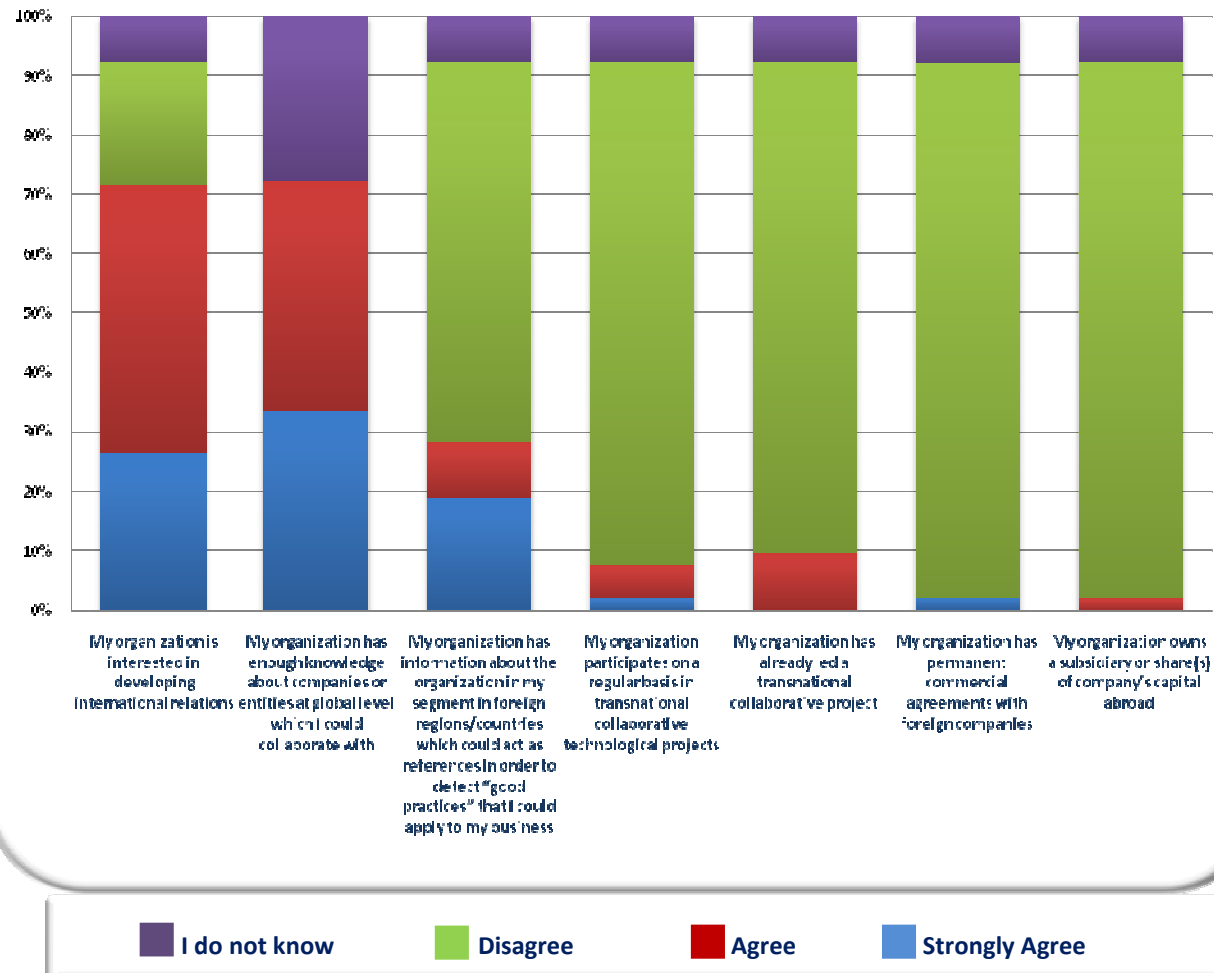


Intercluster cooperation stages



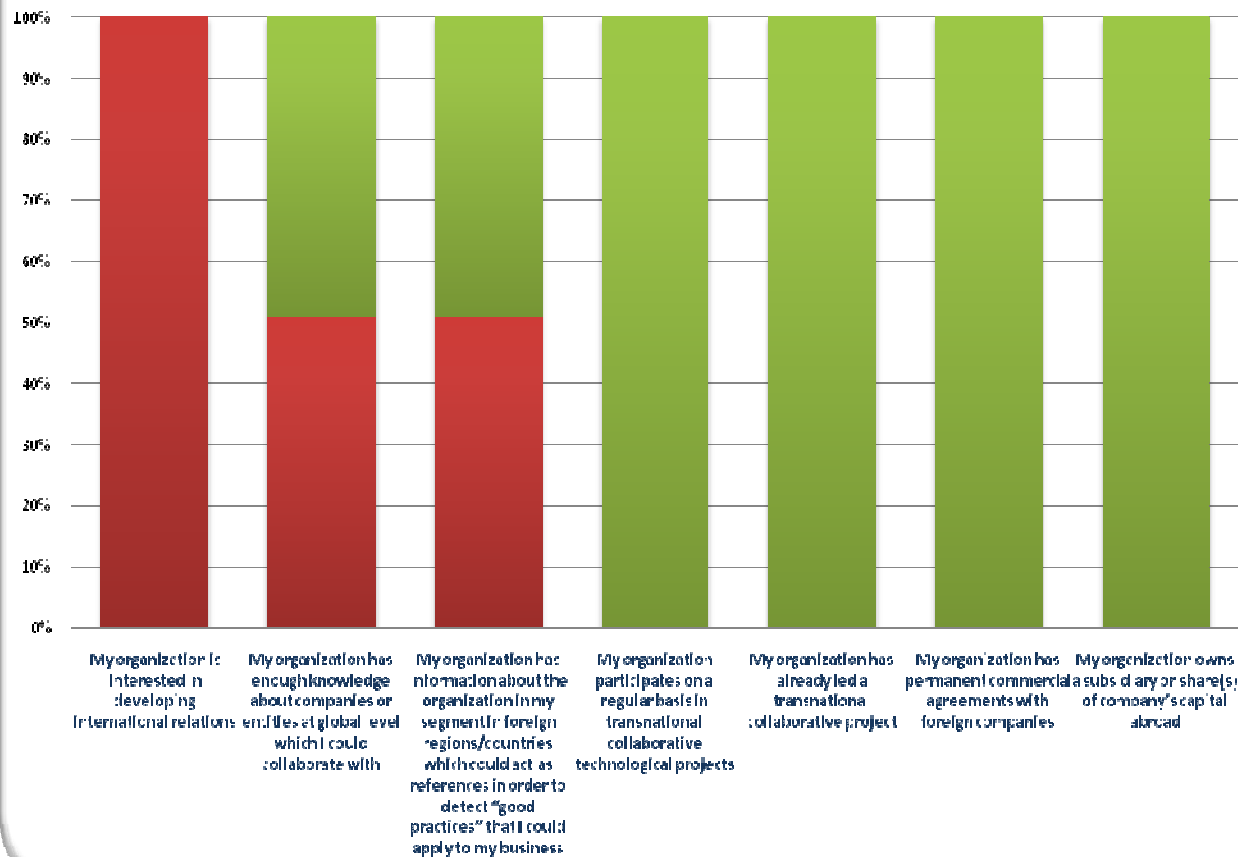
Intercluster cooperation stages

Foods Industry Machinery + Services



Intercluster cooperation stages

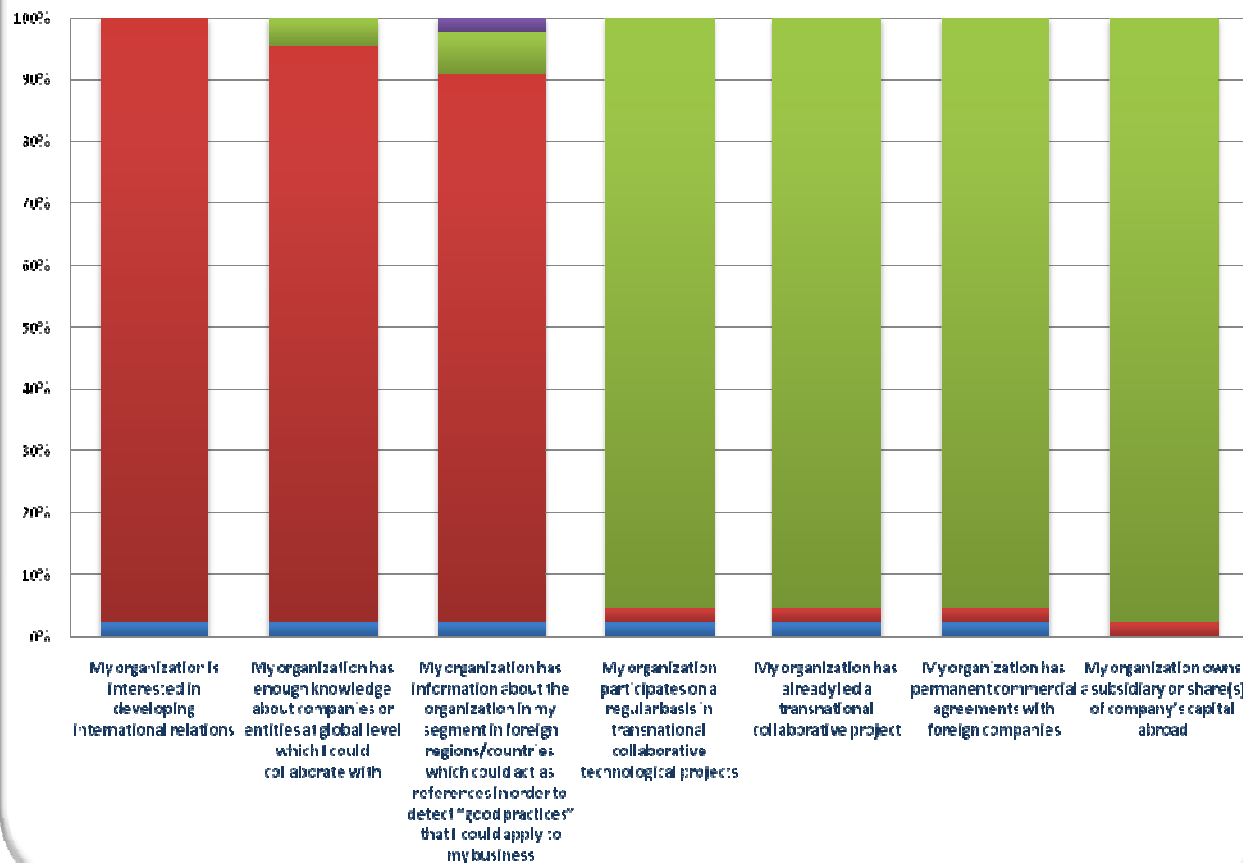
Manufacture of oils and fats



I do not know
 Disagree
 Agree
 Strongly Agree

Intercluster cooperation stages

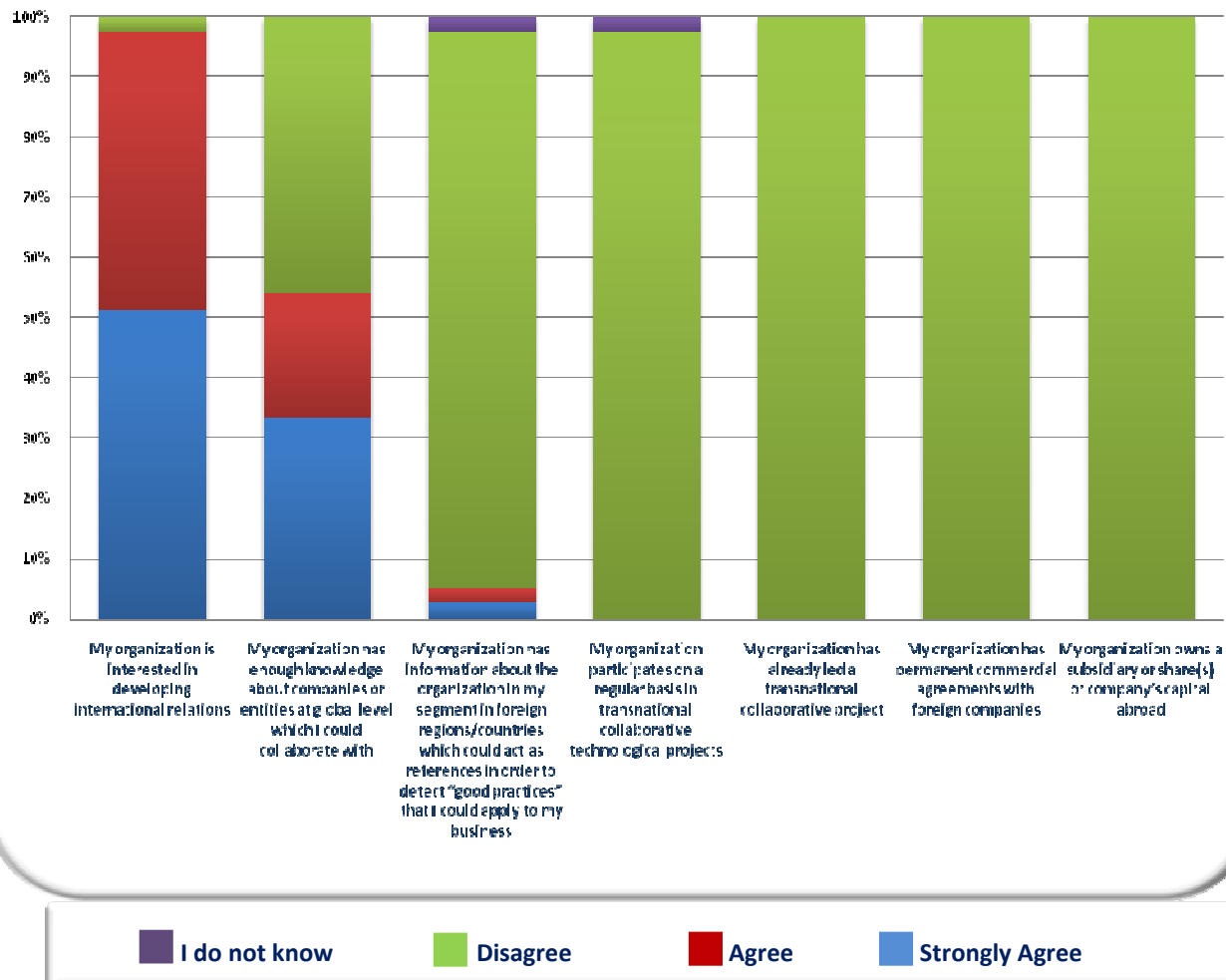
Manufacture of wine and alcoholic drinks



■ I do not know
 ■ Disagree
 ■ Agree
 ■ Strongly Agree

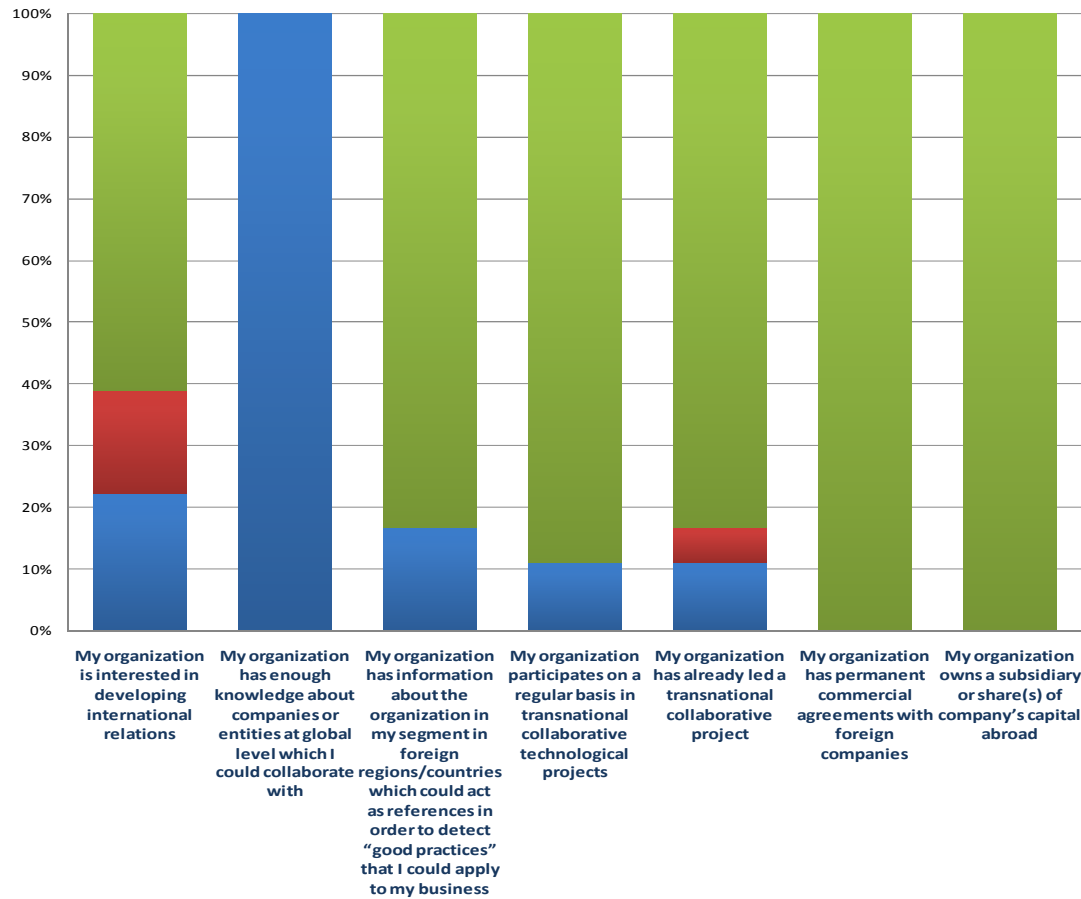
Intercluster cooperation stages

Meat processors + raising



Intercluster cooperation stages

Channels // Demand



I do not know

Disagree

Agree

Strongly Agree



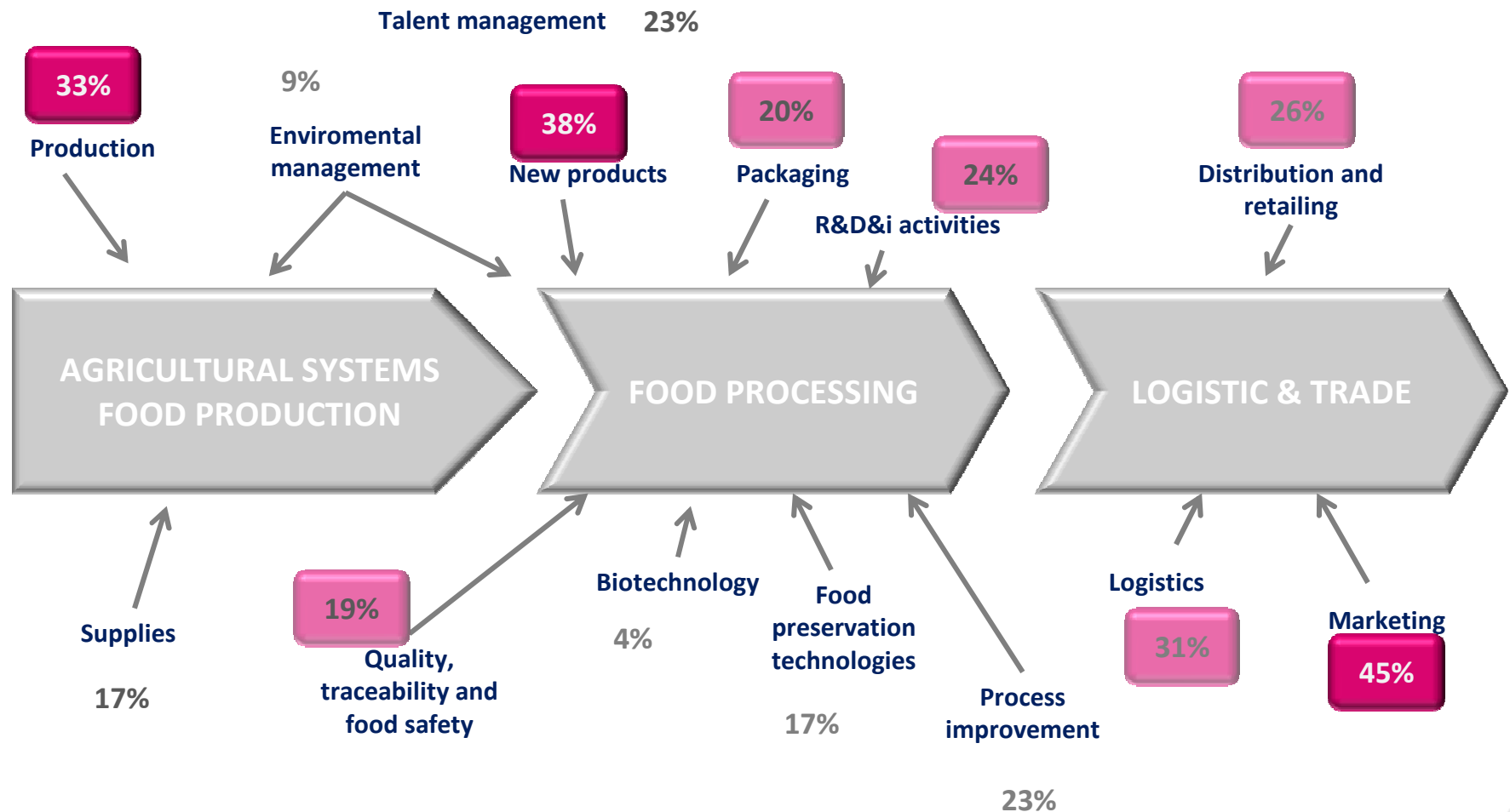
Intercluster cooperation & Value Chain Activities

The large range of activities related to the core business of single entities within the perspective of an agro-food value chain, from agriculture production to logistics and trade, offers many international collaboration opportunities, especially in the perspective of wider integration of individual clusters, an issue of great relevance at European level.

In that respect, it is recommendable to promote initiatives taking into account the opinion of companies. While from the policy-making point of view, some kinds of collaborations may be considered strategic and may need to raise the awareness of companies, their preferences offer valuable ground to trigger concrete initiatives.

The general scope offered by the total results reveals that corporate interests among the partner regions are diverse. In the perspective of the whole project partnership, one may highlight the few topics which are considered as relevant by more than one a third of all respondents: marketing (45% of respondents), the development of new products (38%) and production (33%).

Value chain activities for business cooperation and integration





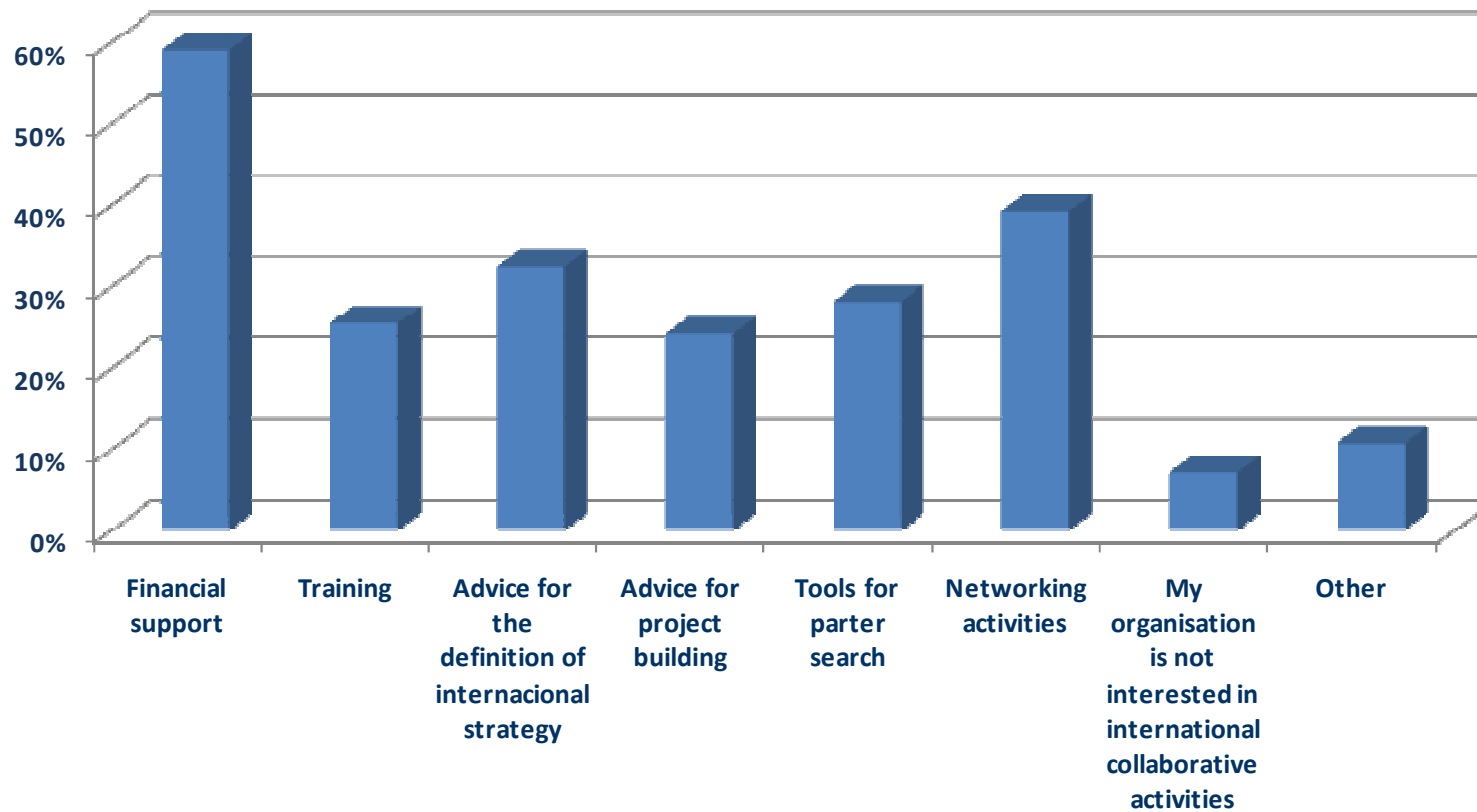
Services requirement for international collaborative activities

Companies were consulted about the type of support they would need in order to take part to international collaborative activities. A list of potential support options was offered (with the possibility to make other suggestions): financial support, training, advice for the definition of international strategy, advice for project building, tools for partner search and networking activities.

At global level, financial support appears as the main need among companies (59% of respondents). Among partner regions, this need prevails in Alentejo, Valencia, Murcia, Emilia Romagna and Kilikis.

Other options have been selected by from 20 to 40% of respondents. However, one should underline that 58% of respondents have included in their needs tools for partner search and/or networking activities.

Services requirement for international collaborative activities





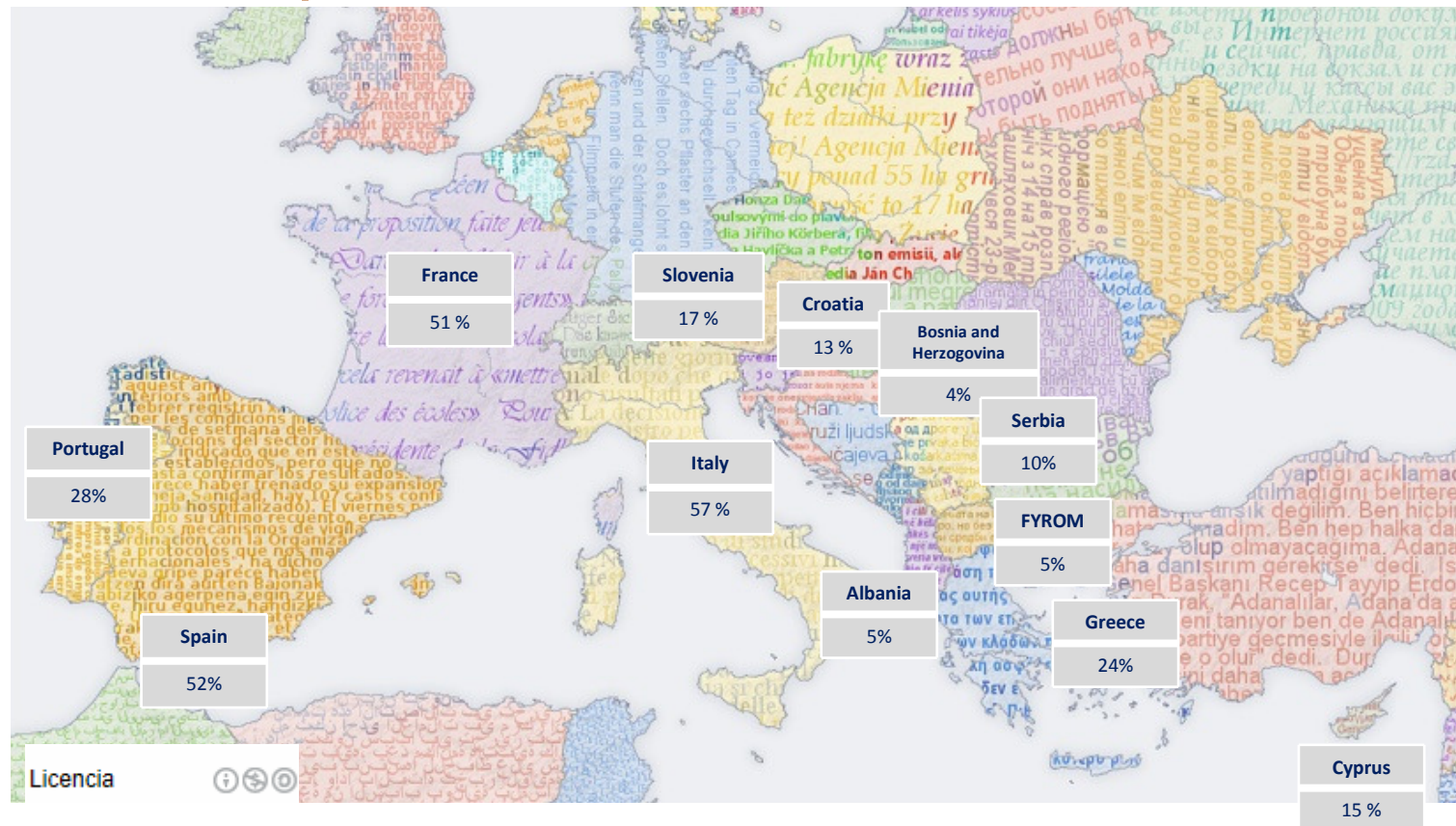
Countries to cooperate with

Companies were asked about in which countries of the MED area they would like to find companies or stakeholders to cooperate with. Global results show an interest focused on a few of the suggested countries:

- Italy, France and Spain were chosen by a majority of respondents. This result is not surprising if we consider that these countries represented the largest markets of the MED area.
- Greece and Portugal follow, with about a quarter of respondents each one.
- Minorities of respondents mentioned a number of other countries, especially Cyprus, Croatia, Serbia and Slovenia.

These results reveal favorable ground for collaborations between companies of the partner regions. Regional results, which are included in regional reports, tell more about “bilateral” opportunities, especially taking into account common agro-food segments.

Countries to cooperate with



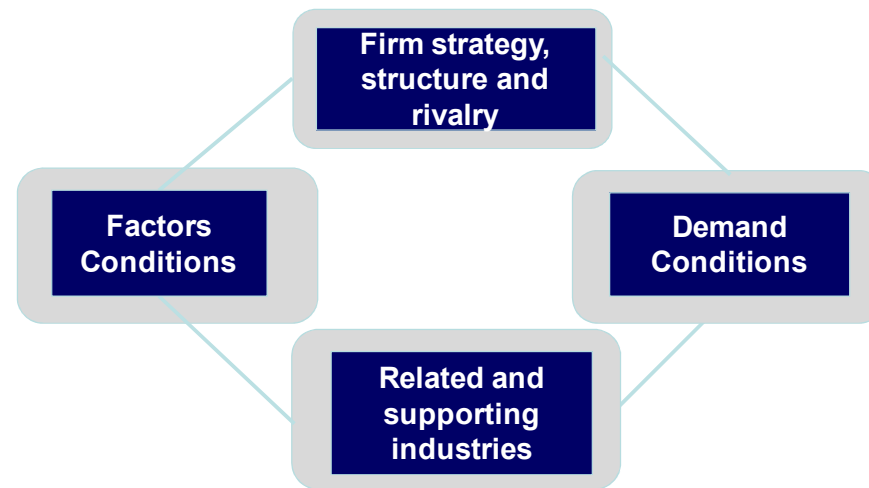
Assessment of cluster conditions

This section first provides total results of the survey's questions about corporate views of their environment as a cluster. Questions were designed to make companies assess this environment according to the competitiveness axes of Michael Porter's "Diamond Model".

The objective of this exercise is to make a first horizontal reading of the existence, organization and maturity of clusters in each one of the partner region, making possible to identify potentials of good practices which could give way to benchmarking between partners.

Other series of questions deals with the respondents' perceptions of the potential influence of collaboration between the triple helix agents within the cluster on their own competitiveness.

The Diamond Model conceptualizes production systems as a set of 4 blocks which externalities have impacts on companies' competitiveness.



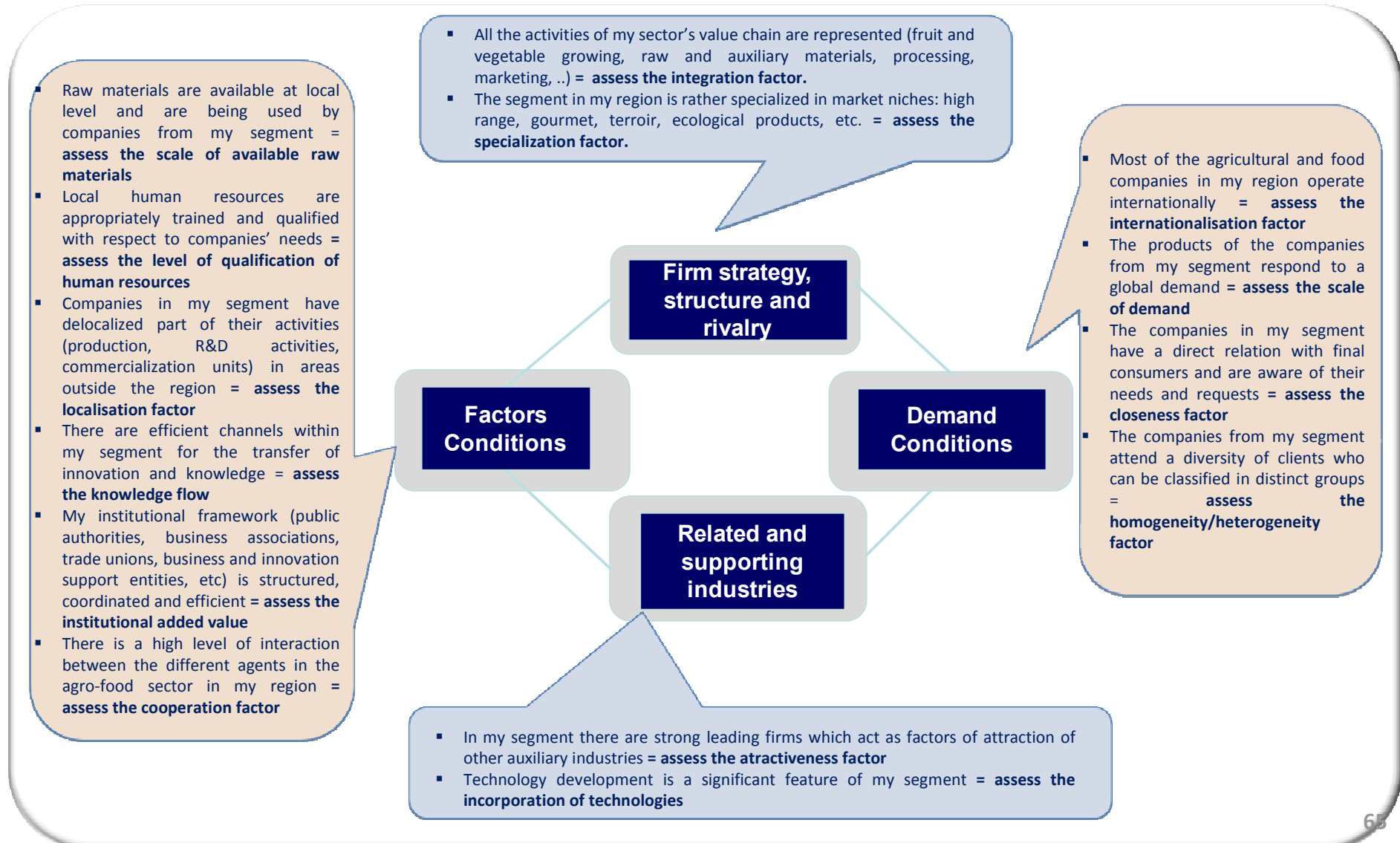
Firm strategy, structure and rivalry. A strong competition at local level between companies is a permanent driver of innovation and competitiveness. Another aspect is the level of integration of activities in a cluster (the more integrated, the better), from a strict sectorial composition to the presence of all the value chain's activities. This also relates to the specialization factor: horizontal clusters need to develop specific market niches so as to grow competitive.

Demand conditions. Demanding clients push companies to quickly react and innovate, especially when they properly deal with a direct relation with clients, while heterogeneous demand favours differentiation and segmentation. Internationalized clusters which attend a global demand have more prospects than those restricted to local needs.

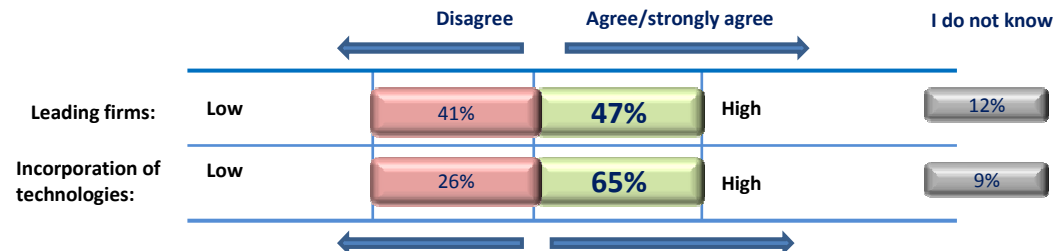
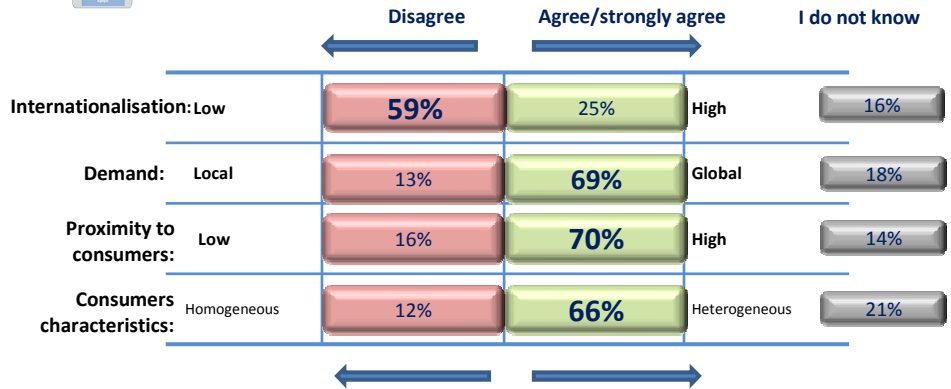
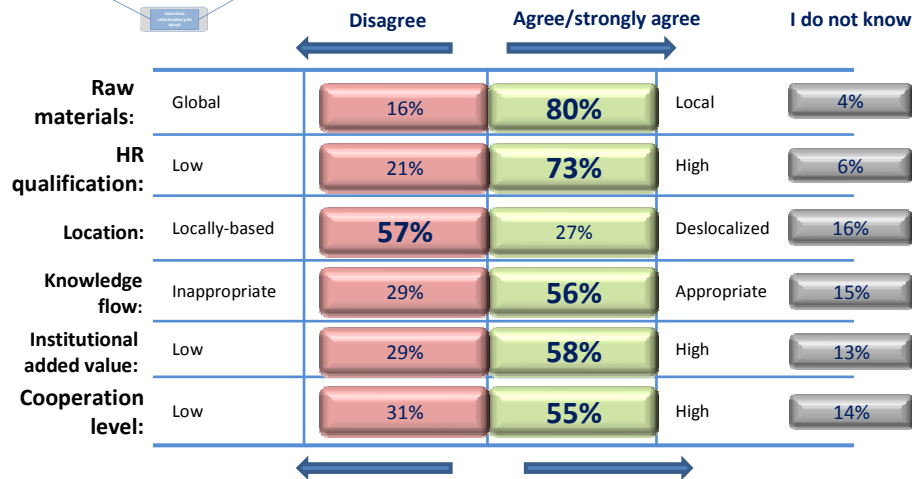
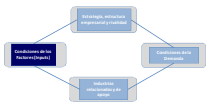
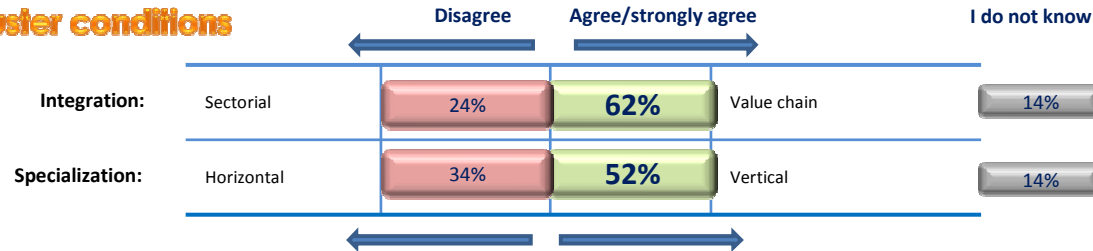
Related and supported industries. The presence of efficient and specialized support industries creates competitive advantages. Proximity increases the possibility of interactions and common learning, while it implies good availability of the inputs. Providers can also be drivers of technology development and innovation of companies. The existence of leading firms within the cluster is a factor of attractiveness for such activities.

Factor conditions. Factors which result from specific resources (educational system, technology know-how of specialized infrastructures, natural resources, etc) provide competitive advantages to a cluster, as they are unique and hard to replicate. This is conditioned by the stakeholders' capacity of interaction and the existence of efficient flows (of resources, information, knowledge, etc). Delocalized activities of cluster members to other areas can result in a fruitful global distribution of the chain value, making the cluster more competitive.

Links between survey's questions and the Diamond Model



Assessment of cluster conditions



Total results do not offer such relevant findings as results at regional level, in the extent that they indicate to partners (as relevant policy-makers) potential issues to deal with in order to support cluster development.

At the level of the project partnership, no common challenge regarding cluster development appears from the consultation of companies, as far as factors in which policy-making (mainly support to companies) can have a critical influence are concerned. Basically, these factors are the integration of value chain activities at regional level (policy-makers can act to attract these activities), specialization in market niches, proximity to consumers and awareness of the clients' needs and expectations, incorporation of technologies, qualification of human resources, channels for knowledge transfer, added-value of the institutional framework and interaction between cluster stakeholders. The issues of internationalization, as innovation and international collaborations are specifically analyzed in previous sections). All these factors are positively viewed by the majority of respondents at global level.

It is however possible to use regional results to identify fields of potential exchange of good practices between the project partners. A range of partner regions display favorable or excellent conditions regarding the aforementioned factors (this assumption derives from clear majorities of opinions among companies participating in the survey, thus have a high degree of subjectivity):

- Value chain representation: Murcia, Valencia, Parma province (specifically tomato-processing), Emilia Romagna (specifically packaging machinery), Kilkis.

- Proximity to consumers and awareness of the clients' needs and expectations: all partner regions except Crete, Alentejo and Provence Alpes-Côte d'Azur.
- Incorporation of technologies: Murcia, Kilikis, Emilia Romagna.
- Specialization in market niches, qualification of human resources, channels for knowledge transfer, added-value of the institutional framework, interaction between cluster stakeholders: Murcia, Valencia, Emilia Romagna.

It still should be determined in which extent companies' views are right or somewhat misled and if these favorable conditions are the results of public (or private) specific initiatives or rather "spontaneous" conditions.

The absence of regions in this list result from divided opinions among companies on one or various of these aspects or prevailing negative opinions. In the second case, it may be interpreted as a signal of gaps which policy-making may address. It concerns Cyprus (on value chain integration, specialization in market niches), Alentejo (on specialization in market niches, channels for knowledge transfer, added-value of the institutional framework and interaction between cluster stakeholders), Kilikis (on specialization in market niches), Valencia (on incorporation of technologies) and Provence-Alpes-Côte d'Azur (on incorporation of technologies and, specifically for the "bread and pastry products" segment, channels for knowledge transfer, added-value of the institutional framework). Regions in this situation may be particularly interested in learning more about good practices from apparently "successful" regions, if the opinions of companies should be more widely confirmed.



Annex



QUESTIONNAIRE PACMAN

Promoting attractiveness, competitiveness and internationalization of Agro-food Clusters of the Med Area.

Project financed by the European Union in the framework of the MED Programme.

For more information on the PACMAN project, please visit the project's website:

<http://www.pacmanproject.eu/>

*Obligatorio

1. Legal form of your organization : *

- Private company/corporation
- Co-operative
- Sole entrepreneur
- Public entity
- Otro:

2. Location : *

- Emilia-Romagna Region, Italy
- Alentejo Region, Portugal
- Murcia Region, Spain
- Valencia Community Region, Spain
- Provence – Alpes – Côte d'Azur Region, France
- Central Macedonia Region, Greece.
- Crete Region, Greece
- Cyprus.

3. If your location is Emilia-Romagna Region, please indicate the province :

- Bologna province
- Ferrara province
- Forli-Cesena province
- Modena province
- Parma province
- Piacenza province
- Ravenna province
- Reggio Emilia province
- Rimini province

4. Number of employees : *

- 1
- 2 to 9
- 10 to 49
- 50 to 249
- 250 or more

5. Average annual turnover *

- 0-500,000 euros
- 500,001 – 2,000,000 euros
- 2,000,001 – 10,000,000 euros
- 10,000,001 – 50,000,000 euros
- More than 50,000,000 euros

6. More than 25% of my organization's capital is owned by a large company *

- Yes
- No
- No comment

7. Segment of activity. Please indicate the main segment of activity in which your organization operate (choose only one answer): *

- Growing of cereals, leguminous crops and oil seeds
- Growing of vegetables and melons, roots and tubers
- Growing of grapes
- Growing of pome fruits and stone fruits
- Growing of others trees and nuts and bush fruits
- Raising of dairy cattle
- Raising of sheep and goats
- Operation of dairy cheese making
- Production of meat and poultry meat products
- Manufacture of grain mill products
- Manufacture of bread; manufacture of fresh pastry goods and cakes
- Manufacture of rusks and biscuits; manufacture of preserved pastry goods and cak
- Manufacture of fruit and vegetable juice
- Other processing and preserving of fruit and vegetables
- Manufacture of wine and alcoholic drinks
- Manufacture of oils and fats
- Manufacture of margarine and similar edible fats
- Foods industry machinery
- Dosing, wrapping, packaging
- Food logistics
- Agricultural sales representatives
- Wholesale of agricultural products
- Retail sale of food, beverages and tobacco
- Food and beverage service activities (hotels, restaurants, catering)
- Otro:

8. Please describe your organization's products and or services

9. Do you operate under any kind of certification ? *

- No
- Geographical indications and traditional specialities: Protected Designation of Origin (PDO), Protected Geographical Indication (PGI), Traditional Speciality Guaranteed (TSG)
- Product Quality certification
- Management Quality certification
- Environmental certification
- Otro:

10. What are your organization's geographic markets ? *

- Regional
- National
- European Mediterranean countries: Portugal, Spain, France, Italy, Slovenia, Croatia, Bosnia and Herzegovina, Serbia, Albania, Former Yugoslav Republic of Macedonia (FYROM), Greece, Cyprus
- Other European countries
- Otro:

11. If you operate at European level, please indicate which are your main markets .



Global report

12. What is the approximate share of international sales in your organization's annual turnover ? *

- 0%
- Less than 5%
- 5-19%
- 20-49%
- 50% or more.
- We export, but we want to keep the figure confidential

13. At which level do you acquire your inputs (raw materials, products to be sold) ? *

- Local/regional market
- National market
- Imports

14. In which innovation area(s) has your company invested ? *

- None
- Agronomy
- Packaging
- Food preservation technologies
- Environmental management
- New products
- Biotechnology
- Quality, traceability and food safety
- Process improvement
- CommercializationCommunication
- Food logistics
- Otro:

15. Please indicate the average share of annual turnover invested by your organization in R&D and innovation [including technological and non-technological innovation]: investments in material or immaterial assets, specialized personnel, advanced services . *

- 0%
- Less than 1%
- 1-15%
- More than 15%.
- Some investments made, but we cannot estimate the share
- We invest in R&D and innovation, but we want to keep the figure confidential

16. Have you carried out R&D&i activities in collaboration with other entities ? *

- No
- With suppliers
- With clients
- With competitors
- With science and technology entities
- Otro:

17. How do you consider the situation of the following aspects in your organization ? *

	It is a strength	In the segment average	It is a weakness	It is not a significant aspect	I do not know
Product identity	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Variety of product formats	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Development of new products as a result of the adaptation to new consumer trends	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Appropriate nutritional, dietetic and/or organoleptic characteristics of products	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Food safety	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Quality certification	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Access to distribution channels	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Access to raw materials and farming inputs	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Adaptation to and/or compliance with the clients' commercial norms	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Environmental sustainability	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

18. Please give us your opinion on the following assumptions regarding your segment and the agro-food sector in your region (companies, suppliers, institutions, R&D entities ,...). *

	Disagree	Agree	Strongly agree	I do not know
All the activities of my segment's value chain are present in my environment (fruit and vegetable growing, raw and auxiliary materials, processing, marketing, ...)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
The segment in my region is rather specialized in market niches: high range, gourmet, terroir, ecological products, etc.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Most of the agricultural and food companies in my region operate internationally	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
The products of the companies from my segment respond to a global demand	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
The companies in my segment have a direct relation with final consumers and are aware of their needs and requests	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
The companies from my segment attend a diversity of clients who can be classified in distinct groups: different profiles of demand, purchasing powers, etc.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
In my segment there are strong leading firms which act as factors of attraction of other auxiliary industries	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Technology development is a significant feature of my segment.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Raw materials are available at local level and are being used by companies from my segment	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Local human resources are appropriately trained and qualified with respect to companies' needs	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Companies in my segment have delocalized part of their activities (production, R&D activities, commercialization units) in areas outside the region	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
There are efficient channels within my segment for the transfer of innovation and knowledge	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
My institutional framework (public authorities, business associations, trade unions, business and innovation support entities, etc) is structured, coordinated and efficient	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
There is a high level of interaction between the different agents in the agro-food sector in my	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

19. To your opinion, what can be the influence of cooperation in your segment (between companies, suppliers, institutions, R&D entities,...) over the competitiveness of your own organization in the following fields ? *

	Very low	Low	High	Very high	I do not know
Product identity	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Diversification of product formats	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Development of new products as a result of the adaptation to new consumer trends	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Appropriate nutritional, dietetic and/or organoleptic characteristics of products	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Food safety.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Quality certification	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Access to distribution channels	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Access to raw materials and farming inputs	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Adaptation to and/or compliance with the clients' commercial norms.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Environmental sustainability	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Internationalization.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

20. Please give us your opinion on the following assumptions regarding your cooperation with companies or entities from other regions/countries : *

	Disagree	Agree	Strongly agree	I do not know
My organization is interested in developing international relations	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
My organization has enough knowledge about companies or entities at global level which I could collaborate with.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
My organization has information about the organization in my segment in foreign regions/countries which could act as references in order to detect "good practices" that I could apply to my business.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
My organization participates on a regular basis in transnational collaborative technological projects.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
My organization has already led a transnational collaborative project.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
My organization has permanent commercial agreements with foreign companies.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
My organization owns a subsidiary or share(s) of company's capital abroad.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

21. Please indicate and briefly describe the 3 main international activity/commercial agreements or collaborative projects (raw material supply, R&D, commercial, distribution, etc) in which your organization has participated in the last three years (if applies)



22. One of the final objectives of the PACMAN project is to promote concrete collaborative projects between the agrofood sectors of the participating territories. As one of the stakeholders of your agro-food sector, we are interested in your opinion. *

Please indicate among the following value chain activities or specific topics which ones could give way to business cooperation and integration with companies or entities from other regions/countries (tick max 5 options):

- Talent management (human resources)
- R&D&i activities
- Supplies
- Logistics
- Production
- Marketing
- Distribution and retailing
- Packaging
- Food preservation technologies
- Environmental management
- New products
- Biotechnology
- Quality, traceability and food safety
- Process improvement
- Otro:

23. What type of services or support would you need in order to take part to international collaborative activities? *

- Financial support
- Training
- Advice for the definition of international strategy
- Advice for project building
- Tools for partner search
- Networking activities
- My organisation is not interested in international collaborative activities
- Otro:

24. In which countries of the MED area you would like to find companies/actors to cooperate with? (please choose a maximum of 3 countries options) *

- Portugal
- Spain
- France
- Italy
- Slovenia
- Croatia
- Bosnia and Herzegovina
- Serbia
- Albania
- Former Yugoslav Republic of Macedonia (FYROM)
- Greece
- Cyprus
- My organisation is not interested in international collaborative activities



The results of the survey will not be communicated on an individual basis. The analysis will be carried out on the basis of aggregated data by region and segment. The individual answers will be strictly kept confidential. In addition to this survey, the PACMAN project includes the initiative of setting up a database, which is intended to be a tool to help agrofood stakeholders of the participating territories to look for potential contacts and partners.

To this end, and if you agree to be included in this database, we would need you to indicate the name of your organization and your website address, along with three basic pieces of information: your location (question 2), your segment of activity (question 7) and the description of your products and/or services (question 8)

I agree to have my organization's name, website and basic information published in the PACMAN database : *

- Yes
- No

Name of the organization (if you a natural person, please indicate your name)

Website :

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Promoting attractiveness, competitiveness and internationalization of Agro-food Clusters of the Med Area



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