

Facts and Figures, Clusters in Schleswig-Holstein (SH) und Hamburg (HH)
Logistics Cluster (Schleswig-Holstein, Hamburg)

| Subject | Comments | Facts and Figures |
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| Cluster focus | | Logistics (transport, warehousing) |
| Type of network | Network, cluster, or competence centre | Cluster (from 2007) |
| Clustertype (I) | Technological, innovative, tertiary | Tertiary core, complemented by manufacturing industries |
| Clustertype (II) | Industry, product, technology, value added chain | Logistics as value added chain L1: trade logistics, forwarding, land transport L2: maritime trade and sea transport, port industry (maritime logistics) |
| Clustertype (III) | Working, growing, emerging, as vision | Working, "value added services" growing |
| Common ground | | Core service: transport, warehousing, storage, port services Additional and complementary service: „value added services“ (by logistics service firms and experts) Technical input: control technique, spare parts supply, plus Packing, information and data processing, insurance, consulting, commissioning, transport legislation, financing, tariff regulation aid, waste management, distribution, quality control, safety control,... |
| Industries involved | | Transport industry, wholesale, business services, insurance service, IT services |
| Technologies | | Transport technologies, controlling and timing technologies, telecommunications, IT technologies |
| Innovation, Patents | | Innovative concepts: Cross Docking, telematic cargo centre, patents for conveying and lifting technique. Patents in: Measuring; control and regulation; data storage and processing; electronics, communication techniques |
| Adjoining and overlapping clusters | | Maritime cluster, aviation cluster, Agriculture-Food-Gastronomy, Press-media |
| Cluster-Management | | Logistikinitiative SH (2007) Logistikinitiative HH (northern part of HH metropolis) Süderelbe AG (for southern part of HH metropolis) LogRegio Lübeck (economic promotion Lübeck, since 2008) |
| Main cluster agents for a complete cluster | Key firms | HHLA (Hamburg port and logistics, 3.500 employees) Hapag Lloyd (HH), Kühne & Nagel (Forwarding, HH), BUSS Group (port logistics, HH), Rhenus Logistics (HH), Voigt Forwarding (Neumünster), 17111 Spedition (Rendsburg), Schenker (Forwarding, HH, Kiel), Airport Hamburg, Lufthansa (air cargo, HH) Cluster core: port economy in HH and Lübeck, air cargo in HH, forwarding (lorries, rail), warehousing, distribution, complementary "value added services" |
| | Qualification institutions | TU Hamburg-Harburg (TUHH), Chair for Logistics University of Hamburg, Inst. f. Verkehrswissenschaft Kühne School of Logistics and Management (TUHH) Polytechnic Schools in Lübeck, Kiel, Flensburg and HH (maritime transport and traffic, port management, port logistics) Internet-consulting for qualification in HH: "Logistik Lernen-Hamburg" |
| | R&D (University) | TU Hamburg-Harburg, Chair for Logistics University of Hamburg, Inst. f. Verkehrswissenschaften |

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| | R&D (Institutions) | New in HH: Fraunhofer Center for maritime logistics and services (CML) |
| | Business- and financial services | Large variety in HH, service firms e.g. for quality control, schedule control, installation, return-logistics |
| | Complementary firms and institutions | Cluster-Management organizations (see above), Regional management: Logistics for the northern part of the HH metropolis Egoh Ostholstein (Economic Promotion for Kreis Ostholstein) Wirtschaftsförderung Lübeck (Economic Promotion for Lübeck)) HHLA Hamburger Hafen und Logistik (HH Port and Logistics) |
| Specialization | | Health Care Logistics (for clinics and rehab clinics, pharma logistics) Food logistics Logistics for paper, printing, press Maritime Logistics (port and container logistics) Air cargo logistics |
| Network supporting | | Cluster-Management (see above), „Haus der Logistik“ in HH Cross Border Logistics (Region Schleswig-Syddanmark): Cross-border network formation (pattern for the Femern region?) Regional management: Logistics for the northern part of the HH metropolis |
| Cluster size (employees and number of firms) | Sources: XXX | SH: 36 Tsd. employees (other numbers: 20 or 45 Tsd.) HH: 67 Tsd. employees Firms (incl. very small firms): more than 5 Tsd. in SH, more than 9 Tsd. in HH HH-metropolis altogether (incl. trade): more than 200 Tsd. employees Firms with more than 10 employees: ca. 300 in SH (with 20 Tsd. employees) |
| Regional focus | | Logistics in HH: Impact and importance twice as much as in German average, and larger compared with SH Lübeck is main German Baltic sea location, with 5-6 Tsd. Employees in logistics, many firms with more than 100 employees. Lübeck port oriented towards Sweden and Finland. SH Southern part (12 Tsd.), Lübeck-Ostholstein (8,8 Tsd.), Region Kiel (8,7 Tsd.) Port logistics in Hamburg, Lübeck und in the southern part of the HH metropolis (districts in northern Niedersachsen). Trade- and Forwarding logistics: along the A1 Autobahn (Hamburg-Lübeck, district Stormarn), the A25 (HH-eastbound), growing along the A20 (Lübeck-Rostock). Kiel Canal (Rendsburg, Kiel) Paper-, printing and publishing logistics in area north of Hamburg (and HH itself) |
| Regional significance | | Very important in Hamburg and Lübeck, subordinate in Kiel |
| Regional identification | | Present and significant in Hamburg und Lübeck (HH particularly L2, Lübeck L1 and L2). For both cities. Identification first via port logistics, shipping, Elbe (HH), Baltic Sea (Lübeck). |
| Competitive situation, prospects and perspectives | | Growth potential by further globalization and growing transport volume and by growing segmentation of production, Growth potentials particularly in “value added services“ |

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| | | <p>Impacts by EU-enlargement to mid and eastern Europe Strong competition with Rhein/Ruhr areas, the Netherlands, Rotterdam port, Eastern Europe regions. Positive: large industry- and service-variety in HH metropolis. Employment scenario for HH region (logistics employees) by Logistik-Initiative Hamburg: +14 Tsd. employees till 2015</p> |
| External relations | | <p>Mecklenburg-Vorpommern: Logistik Initiative (Schwerin) LogOnBaltic: Implementing IT into Logistics, connection of HH region with Baltic Sea regions, improving common presentation of northern Germany</p> |
| Relationships to other parts of the Femern Region | | <p>Denmark: Strong logistics cluster with 50 Tsd. employees, 7 Tsd. firms. Danish forwarding firms use German location (particularly east of Hamburg) for entrance to EU markets. Potential for cross-border cluster, e.g. along the A7 and the Femern route.</p> <p>Femern route (Hamburg-Lübeck-Denmark): Transport corridor for Danish and Dutch forwarders (lorries), present: using Puttgarden-Rödby ferry with essential break for lorry drivers, alternative option: Travemünde ferry to Denmark. Preference for the Fixed Link route in future depends not only on time saving but also on toll costs and chances for a break.</p> <p>Öresund: Öresund Logistics Cluster. Integration with German side still in start up phase. Future vision: Femern Logistics Cluster</p> |
| Interviews (p=personally) | Roy Kühnast (p) | <p>Management „Campuscienceconomy Kiel“ (Wissenschaftspark Kiel) Logistik Initiative Schleswig-Holstein</p> |
| | Ralf Fiedler (p) | <p>Logistik Nördliche Metropolregion (Northern part of HH metropolis), Logistik Initiative Hamburg</p> |
| Further comments | | <p>In the IHK report the Logistics Cluster gained the second best evaluation of all clusters in SH and HH (following the Life Science cluster)</p> |
| Sources | Reports and Internet Information | <p>Sources (see list): 1, 5, 11, 14, 15.</p> |