

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

Food Cluster

Subject	Comments	Facts and Figures
Cluster focus		Agricultural output (incl. fishing), food processing, marketing and distribution (trade, gastronomy, direct marketing)
Type of network	Network, cluster, competence centre	network, cluster
Clustertype (I)	technological, innovative, tertiary	Innovative parts of the cluster
Clustertype (II)	Industry, technology, value added chain	Value added chain
Clustertype (III)	established, growing, emerging, as vision	Partly established, partly in start-up phase
Common ground		Food industry
Neighboring cluster		Maritime cluster (maritime food), logistic cluster, tourism and gastronomy
Industries involved		Key industries: agriculture, fishing, food industry complementary industries: machinery for food industry and agriculture cooling and conservation technology, packaging, logistics, distribution, energy optimization techniques trade for agricultural and food products hotels, gastronomy
Technologies		Green biotechnology, cooling and conservation technology
Innovation, Patents	Indicator for innovation intensity	Share of highly qualified labour in SH below West German average. Intensity of patents concerning food higher in Schleswig-Holstein compared to Germany (especially in south and east of SH), in Hamburg slightly above average
Specialization	Job structure	Schleswig-Holstein: food industry highly represented, third largest manufacturing industry, no specialization in Hamburg
	science, qualification	Agricultural and nutrition science Parts of natural science
	research	Research at universities: Agricultural and nutrition science
Cluster-Management		2 cluster management units in Schleswig-Holstein: FoodRegio (Lübeck) – at economic promotion body (Wirtschaftsförderung) of Lübeck (since 2006, initially bounded to region of Lübeck, later regionally enlarged) Kompetenznetzwerk Ernährung KNE (Competence Network Food) (Flensburg) led by economic promotion body of Schleswig-Holstein (WTSH), since 2007. Initially focused on the north of SH, later for SH in total Problem: competition between KNE and FoodRegio? (FoodRegio: prime focus on production, KNE on network production-research). Süderelbe AG : Cluster management for southern part of the metropolitan region of Hamburg
Main cluster agents for a complete cluster	Key enterprises	Food industry: Schwartauer Werke (Region Lübeck), Niederegger (Lübeck), Böklund Plumrose (Schleswig-Flensburg), Harry Brot (Segeberg), Brüggen (Lübeck), Hawesta (Lübeck)

	Qualification institutions	University of Kiel: Agricultural and nutrition science Polytechnic Lübeck („Food processing technology“) Technical University Hamburg-Harburg Lübeck: Vocational school for nourishment and gastronomy
	R&D (University)	University of Kiel: Agricultural and nutrition science Polytechnic Lübeck, Technical University Hamburg-Harburg
	R&D (Institutions)	Federal research institute for nutrition and food (Max Rubner-Institute, Kiel, Hamburg) Hahn & Co (Lübeck) (research for nutrition industry) Fraunhofer Research Institution for Marine Biotechnology (Lübeck) Future topic: Increasing R&D-facilities, improving integration of R&D-facilities with university institutes
	Business- and financial services	Specific complementary service provider (e.g. financing, insurance, distribution)
	Supporting institutions	Network of Lübeck region: Polytechnic Lübeck, economic promotion body of Ostholstein (Egoh), Chamber of Commerce, Lübeck,
Qualified labor		food industry: share of highly qualified employees in SH below average
Network supporting		Formation of a network of food producers in the Lübeck region, organized by FoodRegio Lübeck. Simultaneously, formation of a network in the Flensburg region, organized by KNE Flensburg. Network in southern hinterland of Hamburg (particularly fruit cultivation) organized by “Süderelbe AG”
Cluster size	Employees and firms	Food industry, specific engineering and wholesale, without the agriculture sector: critical mass achieved in SH, however in Hamburg just related to trade. SH 37.000 employees, HH 22.000 employees Firms: ca. 2000 in SH, ca. 2000 in HH (incl. very small firms), without very small firms ca. 1400 in SH
Regional focus	Spatial focus in SH	Food industry, specific engineering and wholesale (without agriculture): highly represented in entire SH. Emphases: Lübeck and region of Lübeck-Ostholstein, Districts of Pinneberg, Segeberg, Schleswig-Flensburg Employees in Lübeck-Ostholstein: 11.300 (Lübeck: 4.700), in southern Schleswig-Holstein 14.400, Kiel region 7.600, Flensburg region 4.400
Regional significance		Region of Lübeck-Ostholstein: food industry important, Flensburg region: agriculture and food production Hamburg: fruit cultivation (southern hinterland), central markets (distribution), management for food trade
Regional identification		Identification with food industry present in Lübeck, but only minor identification in northern hinterland of Hamburg. Identification of cluster as value added chain still expandable
Competitive situation, perspectives		Intense competition with Denmark, the Netherlands and Northern Germany (Niedersachsen, Mecklenburg-Vorpommern), prospectively also with new EU-regions in the eastern Baltic area
External Relations		Baltfood – transnational network for food industry in the Baltic Sea Region (production, qualification, research): Led by economic promotion body (Wirtschaftsförderung) of Lübeck. Market development, research, innovation, food trend radar, network formation and support. Identification of existing and potential interrelations in the food industry in the Baltic Sea Region (supported by

		<p>EU) Baltfood Business, Baltfood Science, Baltfood Region. Coordination: economic promotion body (Wirtschaftsförderung) of Lübeck. Partners e.g. Öresund Food Network, Board of Economy Hamburg, Polytechnic Lübeck, Skane Food Innovation Network, Universities of Lund, Roskilde and Rostock. External relations in Germany: FoodRegio is member of „German Food Net“ (for German food clusters) Contacts to MVP, Niedersachsen and other German Länder, cooperation agreement with Süderelbe AG (with joint events)</p>
Relationships to other parts of the Femern Region		<p>Relations to Öresund Food Network – elementary (bilateral visitations), have to be intensified. Forerunner: Lübeck-Ostholstein. Fixed Femern Belt link as a boost factor</p>
Further Comments		<p>ambition: joint cluster-management for entire region of SH, HH and southern part of region HH</p>
Sources		<p>Sources (see list): 1, 2, 3, 6, 10, 11, 12, 14.</p>