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**Project “Enhancing capacity of universities to initiate and to participate in clusters development on innovation and sustainability principles” (UniClaD)**

Program Erasmus +, project KA2 n° 609944-EPP-1-2019-1-LT-EPPKA2-CBHE-JP



**Preliminary on-line kick-off meeting**

# **An overview of agrifood clusters in Spain**

**24 April 2020, 11.00 – 14.30**

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## Project “Enhancing capacity of universities to initiate and to participate in clusters development on innovation and sustainability principles” (UniClaD)

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### Preliminary on-line kick-off meeting

## An overview of agrifood clusters in Spain –

### Index of the presentation

1. CLUSTERS IN SPAIN
2. BENEFITS OF CLUSTERS NETWORKS
3. LOCATION OF CLUSTERS IN SPAIN
4. CLUSTERS IN SPAIN SPECIALISATION
5. CLUSTERS IN SPAIN CONCLUSIONS



## An overview of Agrifood clusters in Spain

### CLUSTERS IN SPAIN

- There are 149 agrifood clusters in Spain,
- Bring together **3,591 companies** and **71,312 employees** of the agrifood industry,
- Mean the **25% of the employment** and **companies** of the agrifood sector in Spain.



Figura 2. Clusters agroalimentarios relevantes (fase 2) según empleo. Fuente: SABI y elaboración propia. Nota: © Ministerio de Fomento (<http://atlasau.fomento.gob.es/>) con datos propios.

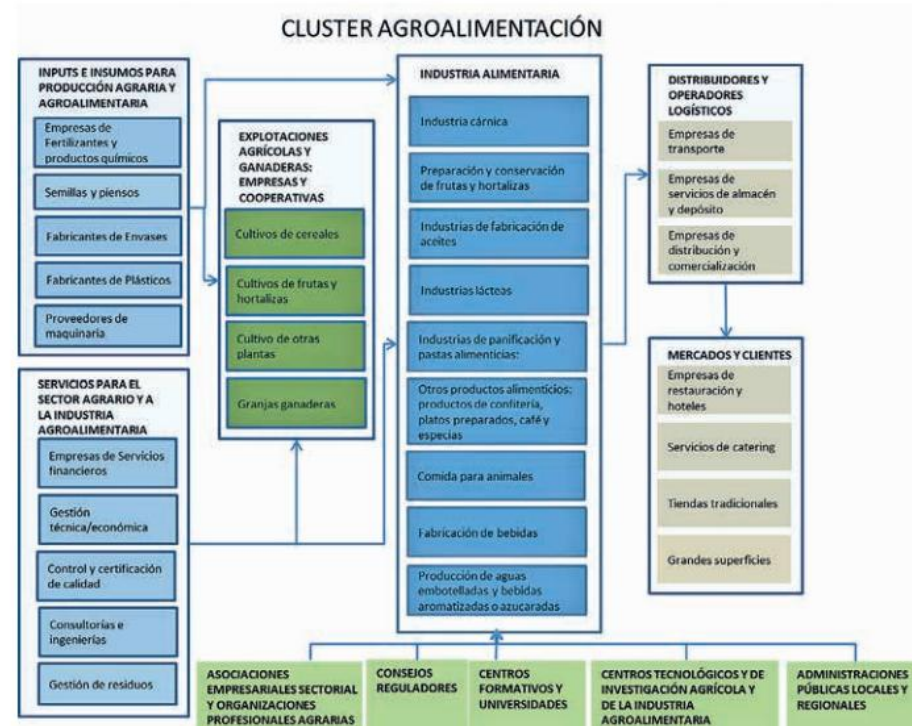


## An overview of Agrifood clusters in Spain

### BENEFITS OF CLUSTERS NETWORKS

“Regional clusters boost the development of the region and industry in three ways:”

- ❖ Increase of productivity,
- ❖ Improve of innovation capacity and,
- ❖ Encourage the creation of new businesses.





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An overview of Agrifood clusters in Spain

## BENEFITS OF CLUSTERS NETWORKS

### ❖ Increase of productivity:

- ✓ Access to inputs and qualified workers, services, information, institutions and public bodies, etc.
- ✓ Facilitate coordination and activity with other companies,
- ✓ Promote diffusion of good practices and incentives for improvement.



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## An overview of Agrifood clusters in Spain

### BENEFITS OF CLUSTERS NETWORKS

- ❖ **Improve of innovation capacity due to:**
  - ✓ Opportunity to receive latest innovations,
  - ✓ Concentrate suppliers and institutions,
  - ✓ Develop of knowledge and experimentation in the framework of the region resources.



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## An overview of Agrifood clusters in Spain

### BENEFITS OF CLUSTERS NETWORKS

- ❖ **Encourage the creation of new businesses:**
  - ✓ Boost business opportunities,
  - ✓ Startups and spin off incentive the concentration of companies and demand,
  - ✓ Competitive resources are enlarged with the creation of new businesses and in doing so, its benefits.





## An overview of Agrifood clusters in Spain

### LOCATION OF CLUSTERS IN SPAIN

- The **clusters with the largest number of companies** are located in Cataluña, Andalucía and Castilla y León.
- Clusters higher **weight** on the economy region of Cantabria and Madrid,
- Bring together the largest number of **companies** and **employees** in Cataluña.

CCAA	NÚMERO CLUSTERS	CLUSTERS IDENTIFICADOS		% DE LA INDUSTRIA AGROALIMENTARIA (IA) DE LOS CLUSTERS SOBRE EL TOTAL DE IA NACIONAL	
		% TOTAL ESPAÑA	% TOTAL CCAA	NÚMERO EMPRESAS	EMPLEO
Andalucía	38	25,5	21,8	4,5	3,5
Aragón	8	5,4	19,5	1,1	0,8
Asturias	3	2,0	18,8	0,3	0,5
Baleares	6	4,0	25,0	0,5	0,3
Canarias	1	0,7	5,0	0,2	0,3
Cantabria	3	2,0	33,3	0,3	0,3
Castilla Y León	11	7,4	14,0	3,3	2,2
Castilla-La Mancha	14	9,4	16,9	2,2	2,0
Cataluña	12	8,1	16,9	4,6	6,4
Com. Valenciana	19	12,8	25,0	2,5	3,6
Extremadura	14	9,4	25,0	1,7	0,8
Galicia	10	6,7	16,9	2,1	2,5
Madrid	1	0,7	33,3	0,2	0,1
Murcia	2	1,3	9,5	0,6	0,9
Navarra	3	2,0	21,4	0,2	0,6
País Vasco	1	0,7	6,3	0,4	0,1
La Rioja	3	2,0	27,3	0,7	0,5
TOTAL CLUSTERS	149	100,0	19,4	25,3	25,6

Fuente: SABI y elaboración propia.





## An overview of Agrifood clusters in Spain

### CLUSTERS IN SPAIN SPECIALISATION

- The **largest number of clusters** in Spain belong to the **meat** and **beverage** sectors.
- Castilla y Leon region is the **main beef production area** in Spain, and leads the national production of porcine, caprine and ovine.
- Castilla y Leon counts with a large tradition in **wine production** with all the wine production areas in the region **labelled and protected with PGI or PDO**.

CNAE	SUBSECTOR	CLUSTERS IDENTIFICADOS		% DEL SUBSECTOR DE LA IA DE LOS CLUSTERS ESPECIALIZADOS SOBRE EL TOTAL NACIONAL DEL SUBSECTOR		% DE LA IA DE LOS CLUSTERS ESPECIALIZADOS SOBRE EL TOTAL DE LA IA EN CLUSTERS	
		NÚMERO CLUSTERS	% TOTAL ESPAÑA	NÚMERO EMPRESAS	EMPLEO	NÚMERO EMPRESAS	EMPLEO
101	Procesado y conservación de carne y elaboración de productos cárnicos	36	24,2	20,9	29,3	26,1	32,0
102	Procesado y conservación de pescados, crustáceos y moluscos	7	4,7	22,5	37,5	5,3	8,1
103	Procesado y conservación de frutas y hortalizas	18	12,1	9,3	21,4	7,3	9,1
104	Fabricación de aceites y grasas vegetales y animales	8	5,4	6,2	11,4	3,5	2,2
105	Fabricación de productos lácteos	7	4,7	3,3	8,8	2,8	3,0
107	Fabricación de productos de panadería y pastas alimenticias	15	10,1	3,2	7,9	7,4	9,6
108	Fabricación de otros productos alimenticios	20	13,4	8,3	12,3	14,5	14,7
109	Fabricación de productos para la alimentación animal	4	2,7	1,7	3,8	0,8	0,8
110	Fabricación de bebidas	34	22,8	28,5	25,8	32,2	20,4
	TOTAL	149	100,0	12,7	18,0	100,0	100,0



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## An overview of Agrifood clusters in Spain

### CLUSTERS IN SPAIN CONCLUSIONS

- There are **149 agrifood clusters** in Spain,
- Bring together **3,591 companies** and **71,312 employees** in the agrifood industry,
- The **clusters with the largest number of companies** are located in Cataluña, Andalucía and Castilla y León.
- The **largest number of clusters** in Spain belong to the **meat** and **beverage** sectors.
- Castilla y Leon region is the largest meat **production area** with a large tradition in **wine production**, with all the wine production areas in the region with PGI or PDO.



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