

Regional Organization of Production in the European Fresh Vegetable Sector

**A value chain and cluster perspective on the competitiveness in
three case studies from Germany, Italy and Spain**

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von Diplom-Geographin
Bettina Riedel
geb. 19. 08.1978 in Langenhagen

Präsident: Prof. Dr. Dr. h. c. Christoph Marksches
Dekan: Prof. Dr. agr. habil. Frank Ellmer

Gutachter: 1. Prof. Dr. Wolfgang Bokelmann
2. Prof. Dr. Maurizio Canavari
3. Prof. Dr. Elmar Kulke

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Bettina Riedel

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ABSTRACTS

English: *European producers of fresh vegetables are under pressure to improve their performance for increasing their competitiveness in the highly competitive global fresh vegetable business. Innovative products and processes and competitive advantage can be gained by the creation and use of unique resources as an outcome of cooperation between producers and complementing actors in local clusters. Locally clustered producers however do not sell to open markets but need access to value chains governed by lead firms – the big European retail companies, who decide about rules and conditions of participation. Main objective of the study is to identify interdependencies in the fresh vegetable sector to understand and explain differences in the competitiveness of regions. Therefore, structures, mechanisms and causalities will be analyzed. Furthermore, mechanisms of adjustments in regions should be discovered with the consequential aim of discussing possibilities for local strategies to guarantee access and continuous participation of local producers in increasingly global markets. The necessity is claimed with this study to combine aspects from cluster theory with ideas from value chain approach to discover elements in European fresh vegetable business that could enable the local producers to gain competitive advantages in the global market. The research represents results from a multiple case-study analysis involving three different European fresh vegetable producing regions in Germany, Italy and Spain. Data were collected via expert interviews with participants from various tiers of the respective marketing channels. The research design provided a multifaceted discussion of mechanisms and causalities of relationship coordination in local cluster and extra-local value chain configurations on concrete examples. In a second step a comparative cross-case analysis and a discussion of single theoretical dimensions of clusters and value chains is provided. Limitations of the study are related to the conceptual framework which integrates multifold variables and therefore allows an understanding of the single theoretical mechanisms that remains somehow on the surface. Furthermore, comparability of the cases might be restricted due to differences in the respective amount of collected data and research bias. Nevertheless, the conceptual framework of the study offered the possibility to get insights into multifold variables that determine competitiveness of fresh vegetable producing regions. It proved useful and necessary to combine aspects of cluster and value chain literature to derive an adequate understanding of the high variety of factors that influence competitiveness of local actors in the globalizing fresh vegetable value chain.*

Deutsch: *Europäische Frischgemüseproduzenten stehen fortlaufend unter dem Druck, ihre Leistungsfähigkeit zu verbessern, um in dem hart umkämpften globalen Frischgemüsebusiness wettbewerbsfähig zu bleiben. Innovative Produkte und Prozesse sowie komparative Wettbewerbsvorteile können gewonnen werden, indem einmalige Ressourcen durch Kooperation zwischen Produzenten und ergänzenden Akteuren in lokalen Clustern kreiert und genutzt werden. Lokal konzentrierte Produzenten jedoch verkaufen ihre Produkte nicht auf offenen Märkten, sondern brauchen Zugang zu spezifischen Wertschöpfungsketten die von leitenden Firmen – die großen transnationalen Europäischen Lebensmitteleinzelhandelsketten – koordiniert werden. Diese leitenden Firmen entscheiden über die Regeln und Konditionen für die Teilnahme in den Wertschöpfungsketten. Ziel der Untersuchung ist, Interdependenzen im Frischgemüsesektor zu verstehen und Unterschiede in der Wettbewerbsfähigkeit von Regionen zu erklären. Dahingehend wird versucht, Strukturen, Mechanismen und Kausalitäten näher zu beleuchten. Weiterhin sollen Mechanismen der Anpassung in Regionen entdeckt werden. Ein abschließendes Ziel ist die Möglichkeit für Strategien auf lokaler Ebene zu diskutieren, die lokalen Produzenten den kontinuierlichen Zugang und Partizipation in zunehmend globalen Wertschöpfungsketten ermöglichen. Die Studie beansprucht die Notwendigkeit, Aspekte der Clustertheorie mit Ideen des Value Chain-Ansatzes zu verbinden, um Variablen im Europäischen Frischgemüsebusiness zu entdecken, die es lokalen Produzenten erlauben im globalen Markt Wettbewerbsvorteile zu sichern. Die Untersuchung präsentiert Ergebnisse einer multiplen Fallstudienanalyse in drei unterschiedlichen europäischen Regionen in Deutschland, Italien und Spanien, in denen auf hohem Niveau Frischgemüse produziert wird. Die Daten wurden über Experteninterviews mit Praktikern aus unterschiedlichen Bereichen der Wertschöpfungskette und des jeweiligen lokalen Frischgemüsesektors gewonnen. Das Untersuchungsdesign erlaubt eine vielfältige Diskussion von Mechanismen und Kausalitäten der Beziehungskoordination in lokalen Clustern und extra-lokalen Wertschöpfungsketten an konkreten Beispielen. In einem zweiten Schritt wird eine komparative Analyse der Ergebnisse der unterschiedlichen Regionen durchgeführt. Der vergleichenden Analyse folgt eine Diskussion der einzelnen abgeleiteten theoretischen Dimensionen für Beziehungskoordination in lokalen Clustern und globalen Wertschöpfungsketten. Einschränkungen der Untersuchung beziehen sich einerseits auf den konzeptionellen Rahmen, der vielfältige Variablen für die beiden Ebenen ‚Lokales Cluster‘ und ‚Globale Wertschöpfungskette‘ einbezieht; dadurch entsteht der Eindruck, dass die Tiefe des Verständnisses der einzelnen theoretischen Mechanismen etwas oberflächlich bleibt. Außerdem scheint die Vergleichbarkeit der drei Fallstudien durch unterschiedlichen Datenumfang und mögliche Voreingenommenheit der Forscherin eingeschränkt zu sein. Gleichwohl ermöglichte der konzeptionelle Rahmen der Studie das Entdecken von vielfältigen*

Variablen, die die Wettbewerbsfähigkeit von frischgemüseproduzierenden Regionen bestimmen. Die Kombination von Aspekten aus Cluster und Value Chain Literatur hat sich als sinnvoll erwiesen, um ein angemessenes Verständnis der vielfältigen Faktoren zu erlangen, von denen die Wettbewerbsfähigkeit lokaler Akteure im globalen Frischgemüsebusiness abhängt.

Italiano: I produttori di ortaggi freschi in Europa devono migliorare di continuo la loro efficienza per rimanere competitivi nel mercato ortofrutticolo, che è sempre più globale e competitivo. Vantaggi competitivi possono essere raggiunti attraverso la creazione e impiego di elementi distintivi, risorse uniche che sono il risultato della cooperazione tra produttori e attori complementari operanti in 'cluster' locali e che possono portare alla realizzazione di prodotti e processi innovativi. I produttori però non vendono prodotti ortofrutticoli in mercati aperti, bensì hanno bisogno di avere accesso a catene del valore specifiche che sono governate da imprese leader – i gruppi multinazionali della grande distribuzione – che stabiliscono le regole e condizioni della partecipazione. Obiettivo della ricerca è di comprendere meglio le interdipendenze nel settore degli ortaggi freschi e di poter spiegare differenze nella competitività tra le regioni. Per raggiungere questo obiettivo, nello studio si tenta di evidenziare strutture, meccanismi, interdipendenze e nessi di causalità nelle relazioni tra gli attori nel settore degli ortaggi freschi. Inoltre si cerca di individuare e comprendere meccanismi di adattamento a livello regionale. Un ulteriore scopo perseguito con questa ricerca è quello di discutere le possibili strategie a livello regionale che possano facilitare l'accesso e la partecipazione continua dei produttori locali nelle catene del valore del settore ortofrutticolo, che presentano rami d'azione sempre più globali. L'indagine sostiene la necessità di combinare aspetti della teoria dei 'cluster' con idee derivate dall'approccio delle 'global value chains' per individuare variabili nel settore europeo di ortaggi freschi che possano dare la possibilità ai produttori locali di assicurare vantaggi competitivi nel mercato globale. La ricerca presenta risultati di un'analisi di casi di studio multipli che coinvolge tre diverse regioni europee che producono ortaggi freschi in Germania, Italia e Spagna. I dati sono stati raccolti per mezzo di interviste non-strutturate con esperti di diversi segmenti della catena del valore di ortaggi freschi. La prima analisi del materiale testuale raccolto ha consentito di realizzare una discussione variegata di meccanismi e causalità emersi nel coordinamento di relazioni nei cluster locali e nelle catene del valore globali sulla base di esempi concreti. In seguito è stata compiuta un'analisi comparativa dei singoli casi di studio. Per concludere viene presentata una discussione delle particolari dimensioni teoriche dei cluster e delle catene di valore, paragonando i risultati con le risultanze dell'analisi della letteratura precedente. Le limitazioni della ricerca sono collegate alla sua natura concettuale

ed alla diversità strutturale dei due approcci di “cluster” e “value chain” adottati. La conseguenza è che la comprensione dei particolari meccanismi teorici potrebbe richiedere un ulteriore approfondimento. Inoltre, la comparabilità dei singoli casi di studio potrebbe essere limitata a causa delle differenze nelle quantità e qualità di dati disponibili e della maggiore strumentazione comunicativa e di conoscenza della ricercatrice nell’analisi del caso tedesco. Tuttavia, la struttura concettuale della ricerca ha consentito di migliorare la comprensione delle variabili multiple che determinano la competitività di regioni che producono ortaggi freschi. Si può concludere che combinare aspetti della teoria dei cluster con le idee della letteratura delle catene del valore è stato utile e necessario per ottenere una maggiore comprensione dei distinti fattori che influenzano la competitività di attori locali ma integrati in una catena del valore di ortaggi freschi sempre più globale.

Castellano: *Los productores europeos de hortalizas frescas tienen que mejorar continuamente los resultados para aumentar su competitividad en un sector con una competencia cada vez más intensa. La cooperación de productores y actores complementarios en ‘cluster’ locales permite obtener recursos distintivos capaces de generar productos y procesos novedosos. Sin embargo, en general, los productores agrupados en una región no venden en mercados internacionales. Para ello necesitan acceder a cadenas de valor que están gobernadas por empresas líderes – los grupos transnacionales de la distribución organizada – que determinan las reglas y condiciones de la participación. En este contexto, el objetivo principal de esta investigación es conocer las interdependencias que se dan en el sector hortofrutícola y mejorar la comprensión de las diferencias de competitividad entre regiones, identificando en las mismas mecanismos de adaptación y estrategias para asegurar a los productores locales el acceso y la creciente participación en un mercado cada vez más global. El procedimiento seguido para alcanzar el objetivo propuesto consiste en analizar las estructuras, los mecanismos y las causas de las relaciones entre los actores. Para ello, es necesario combinar aspectos de la teoría de ‘cluster’ con los de la literatura de la “cadena de valor”. Esto permitirá descubrir en los negocios europeos de hortalizas frescas factores que pudieran ayudar a los productores a crear ventajas competitivas en el mercado global. El trabajo presenta los resultados de un análisis de casos de estudio múltiple incluyendo tres regiones europeas distintas en Alemania, Italia y España que producen hortalizas frescas. El método principal de obtención de los datos consistió en entrevistas no estructuradas a expertos de diferentes eslabones de la cadena de valor. El diseño de la investigación permite la discusión, desde diferentes puntos de vista y utilizando ejemplos concretos, de los mecanismos de coordinación de las relaciones en cluster locales y en cadenas de valor globales. En concreto, el estudio ofrece un análisis comparado de tres casos*

y una discusión de las singulares dimensiones teóricas de clusters y cadenas de valor. Las limitaciones de la investigación tienen que ver con el esquema conceptual que incorpora variables múltiples y que sólo permite una comprensión superficial de los singulares mecanismos teóricos de coordinación. Además, la comparación de los casos se puede ver limitada debido a las diferencias en la cantidad y calidad de los datos conseguidos. No obstante, es posible concluir que el esquema conceptual ha permitido mejorar la comprensión de las variables múltiples que determinan la competitividad de las regiones especializadas en la producción de hortalizas. Resulta razonable y necesario combinar indicadores de los dos teorías, cluster y cadena de valor, para comprender la variedad de factores que influyen en la competitividad de los actores locales en cadenas de valor de hortalizas cada vez más globales.

Für meine Eltern

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LIST OF ABBREVIATIONS

BMVEL	Bundesministerium für Ernährung, Landwirtschaft und Verbraucherschutz
GCC	Global Commodity Chains
GREMI	Groupe de Recherche Européen sur les Milieux Innovateur
CSO	Centro Servizi Ortofrutticoli
GVC	Global Value Chains
ISMEA	Istituto di Servizi per il Mercato Agricolo Alimentare
ISTAT	Istituto Nazionale di Statistica
MARM	Ministerio de Medio Ambiente y Medio Rural y Marino
OECD	Organisation for Economic Co-operation and Development
STLA RLP	Statistisches Landesamt Rheinland-Pfalz
ZMP	Zentrale Markt- und Preisberichtsstelle