

# EUROPEAN CLUSTER CONFERENCE 2020

10-11 NOVEMBER 2020 | BRINGING TOGETHER THE CLUSTER COMMUNITY

## Ecosystem session: RETAIL

Clusters strengthening ecosystems



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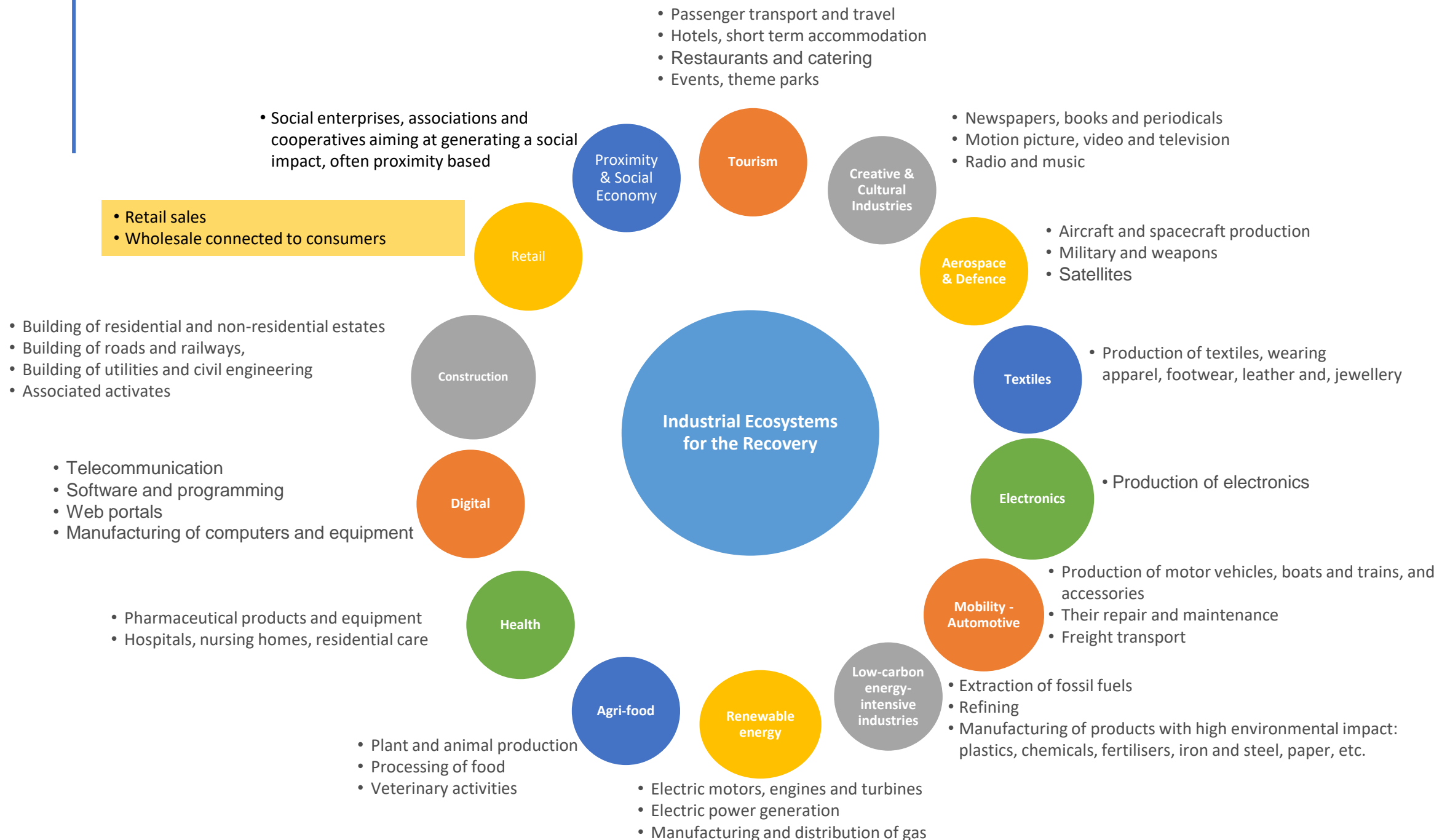
## Retail Ecosystem

Paulina Gbur

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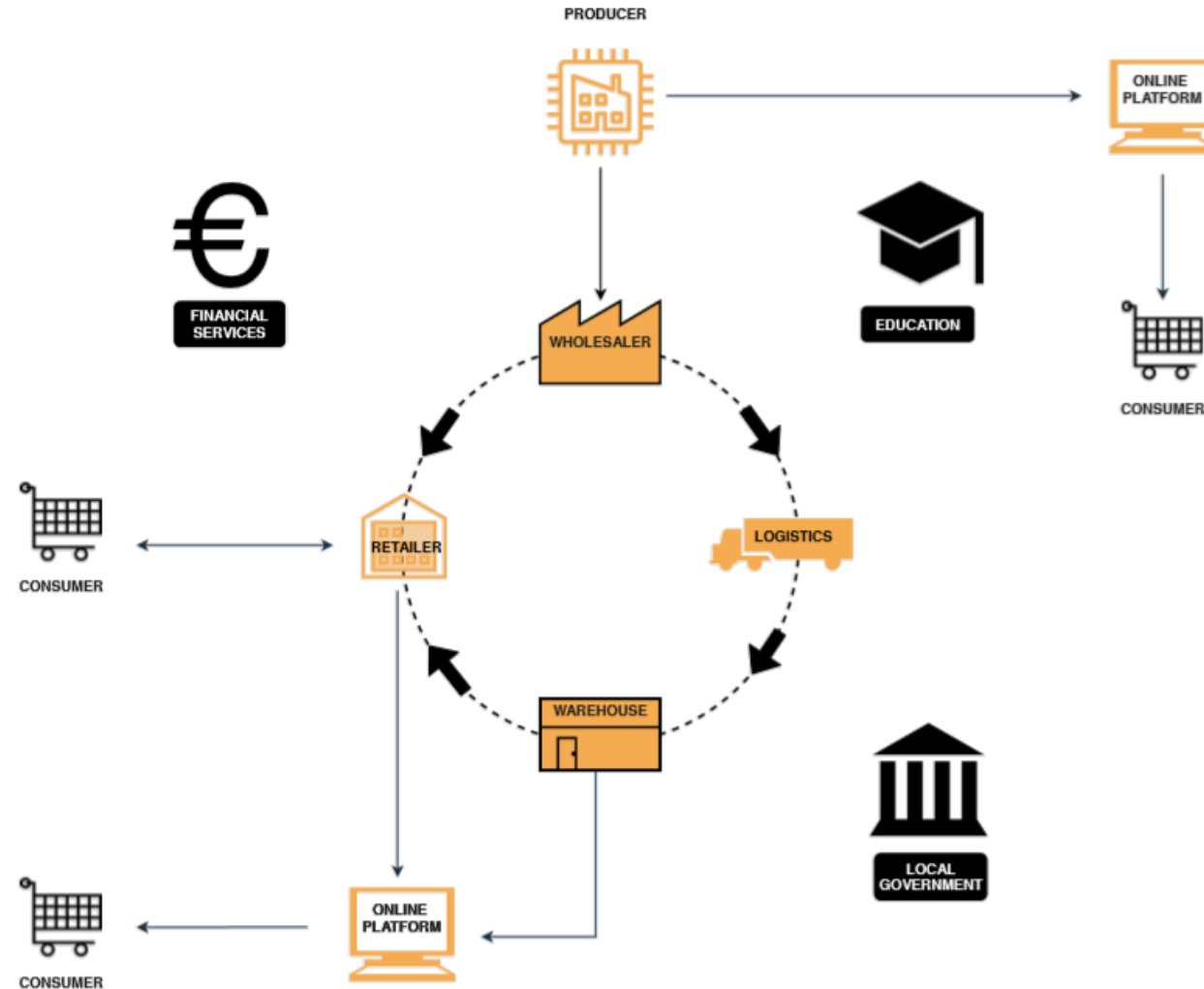


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## The Retail Ecosystem

### Characteristics

- Covers grocery and non-grocery retail, including e-commerce, and relevant wholesale; also suppliers, transportation, logistics, relevant real estate and consumers
- Directly employs more than 21m people in 4.4m companies (indirect employment much larger), 99 % of which are SMEs

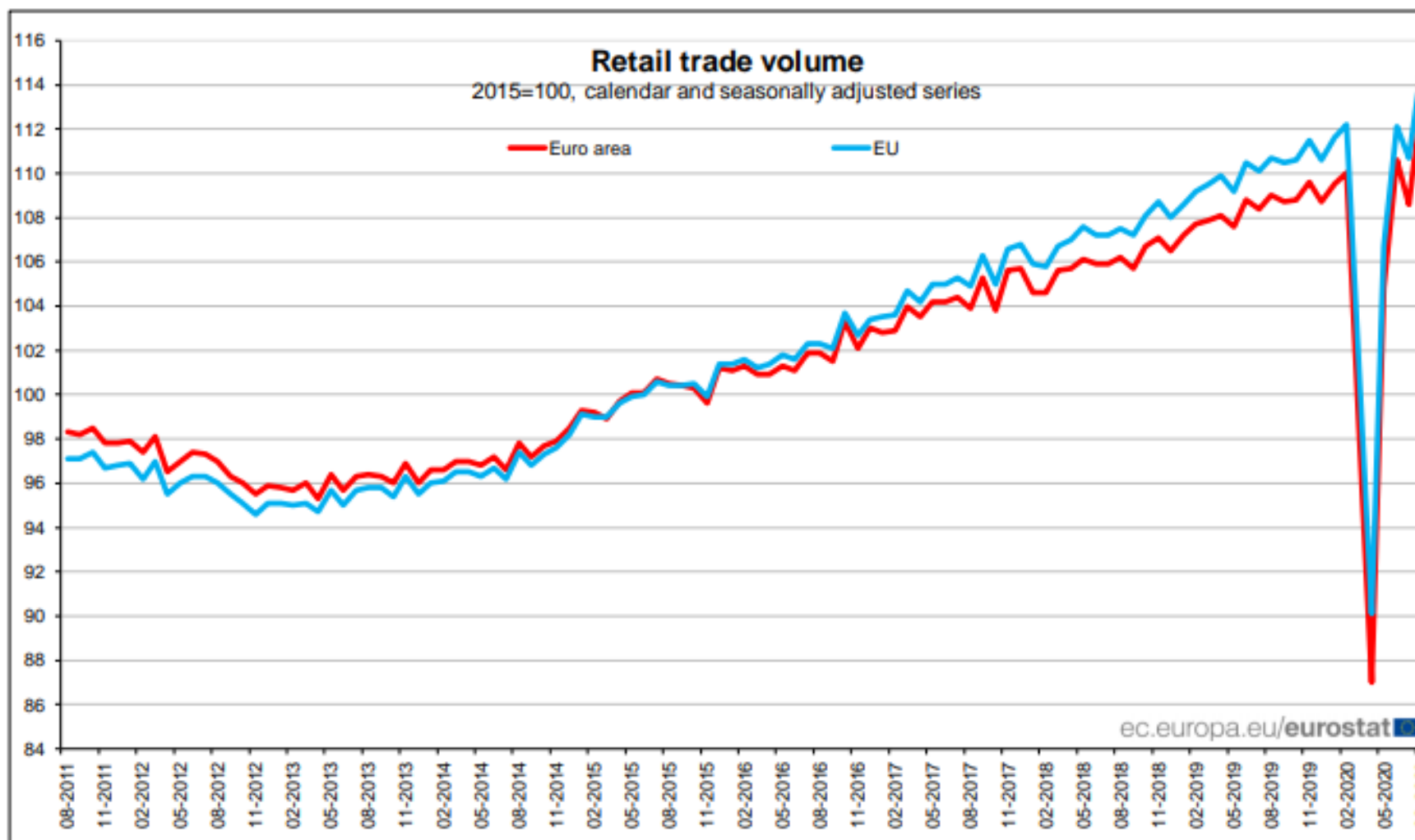
### Problems

- Significant drop in non-grocery retail turnover, reduction in wholesale sales (non-grocery and grocery)
- Liquidity problems, increased operational costs, unemployment
- Decrease in consumer confidence
- Need to invest in a green and digital transition to remain competitive
- Need to invest in resilience in case of future shocks



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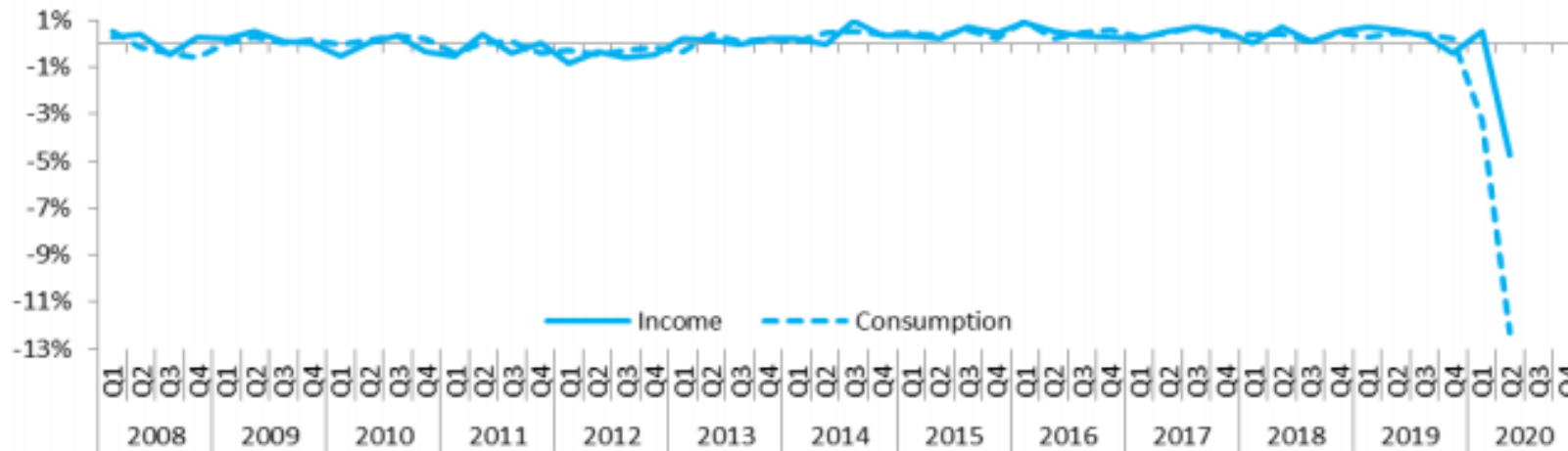
Source: Eurostat

<https://ec.europa.eu/eurostat/documents/2995521/10663810/4-05102020-AP-EN.pdf/f35894fa-382a-3b54-1029-70cc146d21ed>

- Household real consumption per capita dropped by **-12.3%** in the EU, in the second quarter of 2020.
- This decline is the highest since the beginning of the time series in 1999.

Real growth of household income and consumption per capita  
% seasonally adjusted

EU



Source: Eurostat

<https://ec.europa.eu/eurostat/documents/2995521/11469181/2-29102020-AP-EN.pdf/acf4533a-a345-53dd-108a-c9dea9a28898>

## What does recovery mean for retail?

### Retail as an **ecosystem**

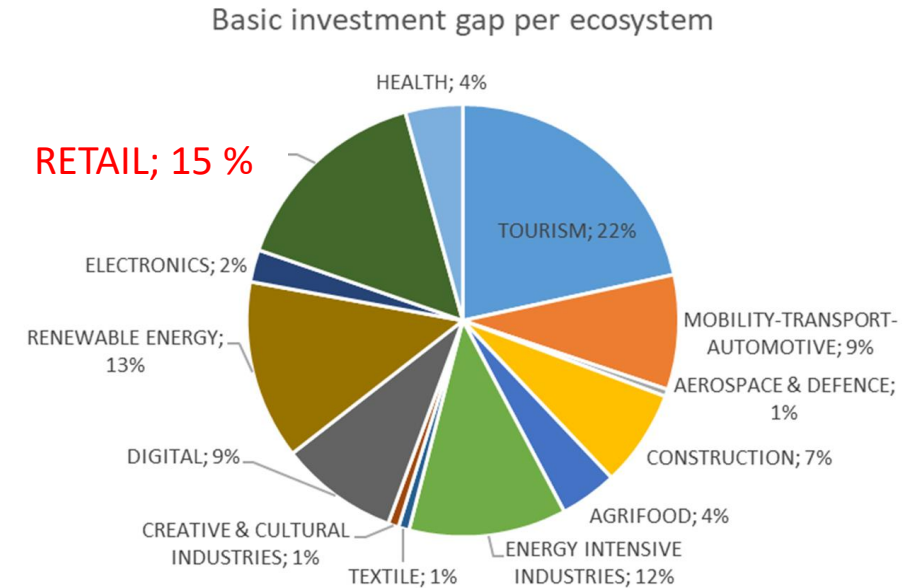
- among those most hit by the crisis
- with the second biggest investment gap

### Focus on the twin transition:

- **green and digital** investments,
- **resilience** building

### **Single Market** as a key driver for recovery:

- follow-up to the Retail Communication 2018, better enforcement of the Services Directive and Single Market freedoms,
- follow-up to the Industrial Strategy, including the Barriers Report and the SME Strategy,
- follow-up on Territorial Supply Constraints.





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## Next Generation EU

- **Recovery and Resilience Facility (RRF)**  
**EUR 672.5 billion**
  - of which grants EUR 312.5 billion
  - of which loans EUR 360 billion
- **ReactEU:** EUR 47.5 billion
- **Horizon Europe:** EUR 5 billion
- **InvestEU:** EUR 5.6 billion
- **Rural Development:** EUR 7.5 billion
- **Just Transition Fund (JTF):** EUR 10 billion
- **RescEU:** EUR 1.9 billion
- **Total: EUR 750 billion**

Commitments 2021-2022 = 70%



70% of the grants provided by the RRF shall be committed in the years 2021 and 2022.

The remaining 30% shall be fully committed by the end of 2023.

## European Commission policy on retail

- Reform priorities identified in the European Semester process -> **national Recovery and Resilience Plans**;
  - call for more flexible regulatory framework and investments;

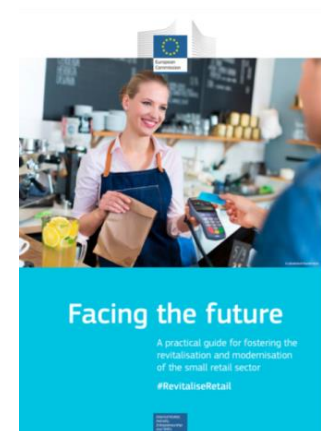
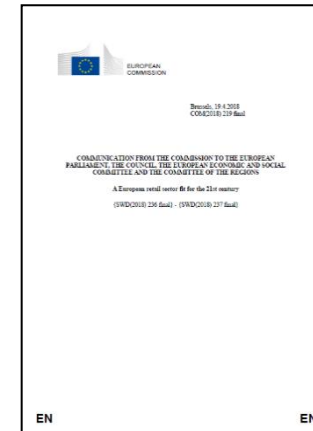
- 2018 Commission Communication on retail

- Best practices + Retail Restrictiveness Indicator

[https://ec.europa.eu/growth/single-market/services/retail\\_en](https://ec.europa.eu/growth/single-market/services/retail_en)

- Global approach:

- barriers to free circulation of goods and to e-commerce are also barriers to retail ;
  - cross-cutting dimension of retail – retail barriers are also barriers to the agri-food, textile, social economy and proximity ecosystems, etc.;



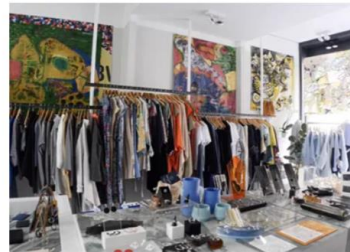
## Local initiatives to revitalise small retail - examples

started some years ago  
even more relevant in the COVID-19 crisis

### hub.brussels

- Brussels Agency for Business Support
- Television Show – *Open*
- Incubators
- Coaching

Smart Retail City Lab

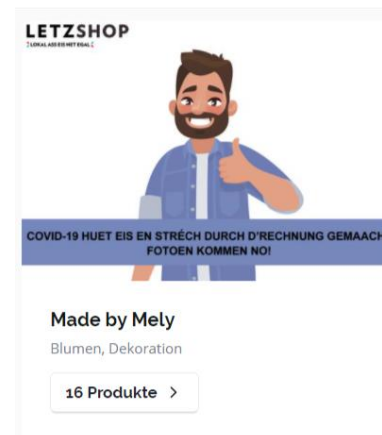


Smart Retail City from hub.brussels: a city where retail is personal, flexible and innovative.

[visit the living.lab site](#)

### LetzShop.lu

- National Online Platform
- Initiative from the Ministry of the Economy
- Help Brick and Mortar Retailers
- Collaboration and Data



## Clusters and the retail ecosystem?

- Retailers most likely classified as Distribution and Electronic Commerce
- Are retailers and wholesalers present and active in clusters?
- How can retailers and wholesalers benefit from the cluster activity in innovation?

Examples of cooperation in the Covid crisis

Analogy to the local initiatives supporting the revitalisation of city centres – natural clusters?

# Thank you

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[https://ec.europa.eu/growth/single-market/services/retail\\_en](https://ec.europa.eu/growth/single-market/services/retail_en)

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## CLUSTERS STRENGTHENING ECOSYSTEMS

## RETAIL

*Monica Riera – Packaging Cluster, Spain*  
*Aleix Iglesias - Project Manager of the  
Foodservice Cluster of Catalonia*



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## THE CLUSTERS



Founded in 2012  
+100 active members



+3,500 M€ turnover  
+80 associates



## THE RETAIL CONTEXT

- VUCA:
  - In September 2020, total EU retail sales decreased by 2.0 % compared with August 2020
  - The total sales volume is now equal to 100.7 % of the volume reached in February before the Covid-19 crisis; last month the level had already been 102.5 %
  - Automotive and textile as most affected\*
- 10 Challenges
  - New competitors
  - Fusion product-service-consumable
  - E-commerce normalisation
  - Packaging' strategic role
  - Hyper contextualisation
  - Sustainability
  - Collaborative economy
  - Manufacturers & Retailers
  - Consumers' profit
  - Strategy

## WHAT CAN CLUSTERS DO?

### The Digital Consumer and E-commerce Trends and Challenges

- Digital 1/12 macrotrends
- Understanding opportunities in an evolving omnichannel world





## WHAT CAN CLUSTERS DO?

### SAFE SMART FOOD

- 4 countries: Spain; Austria; Lithuania; and Latvia
- 7 challenges: Last Mile; Foodtech; Smart Food; Food Safety; Sustainability; Smart Packaging; and End User.



Second C2C meeting within the framework of the European Safe Smart Food project, where future trends in the agri-food sector have been shared



**Creative reborn packaging**

**Spain** Industrias Plásticas Triana, S.A.



**Package-based product shelf life estimation**

**Spain** Zyrccular Foods



**Sustainable and affordable cutlery**

**Spain** Areas



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## WHAT CAN CLUSTERS DO?

### BIO-ENV II

2019

Búsqueda de polímeros biodegradables compatibles

MÁS DETALLES ▾

### SUMBOX

2019

Sumbox

MÁS DETALLES ▾

### PACTEX 2.0

2018

Proyecto de simbiosis industrial entre el sector textil y packaging

MÁS DETALLES ▾

### BIO-ENV

2018

Realización de tubos de PP inyectado biodegradables

MÁS DETALLES ▾

### COOLPACKAGING

2018

Desarrollo de un packaging modular para mantener la temperatura controlada al interior

MÁS DETALLES ▾

### 0 VERTIDOS

2018

Desarrollo experimental para la mejora de uso y el control del agua residual

MÁS DETALLES ▾

### Planta Digital

2019

Planta Digital

MÁS DETALLES ▾

### CARTON CLICK

2019

Configurador parametrico online para cajas de cartón ondulado 3D

MÁS DETALLES ▾

### RECIRCULA

2018

Dispositivo incorporado en los contenedores que interactúa con el ciudadano ofreciendo incentivos para el reciclaje

MÁS DETALLES ▾

### COMPARTIM

2018

Proyecto de Valor Compartido

MÁS DETALLES ▾

### EMPREN

2017

Implantación de un programa de aceleración emprendedora en el ámbito del packaging. EMPREN.

MÁS DETALLES ▾

### 3D CLICK

2017

Estudio de viabilidad de una herramienta online para el sector del packaging. 3D CLICK.

MÁS DETALLES ▾

### SAFE SMART

2019

Safe Smart Food

MÁS DETALLES ▾



Plataforma colaborativa entre 5 clusters alimentarios

MÁS DETALLES ▾

### GOLDEN BUBBLES

2018

Desarrollo de etiquetas con adhesivo removible

MÁS DETALLES ▾

### FOODSENSING

2018

Estudio de viabilidad para unas etiquetas inteligentes para envases frescos

MÁS DETALLES ▾

### CODIMmm

2017

Proyecto colaborativo de sostenibilidad en logística y embalaje en el hábitat. PALHAB.

MÁS DETALLES ▾

### PALHAB

2017

Estudio del consumidor digital compartido con clusters del sector alimentario. CODIMmm.

MÁS DETALLES ▾

## WHAT CAN CLUSTERS DO?



### STRATEGIC DIVE 2020

- Adaptation to digitalisation
- Participation of Brand Owners
- From international to regional

## Member States' experience and measures (in Spring)

- Significant impact of the COVID crisis on services confirmed (impact on total GDP, value added in services, retail turnover)
- Continuation of horizontal recovery measures: supporting survival of companies and saving jobs (tax reliefs, rent reliefs, grants, loans, deferral of payments)
- More specific measures: supporting businesses linked to tourism (CY, IT), tax reliefs for companies not able to liquidate stocks (IT), specific support for retail companies linked to employment (LU), help to SMEs going on-line (IE)

## Member States' experience and measures (in Spring)

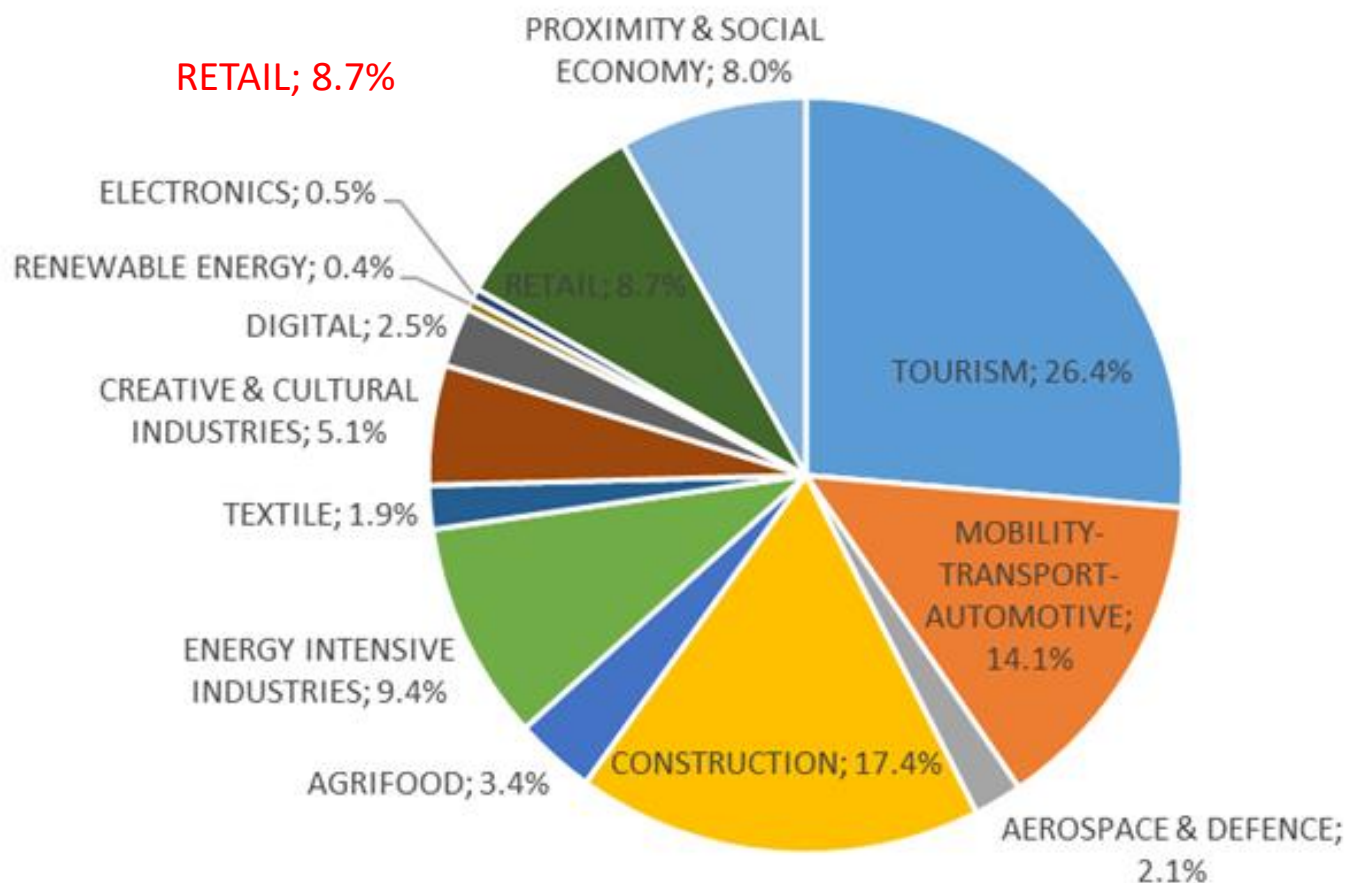
- Forward-looking measures:
  - Horizontal: supporting green and digital transition, facilitate investments and internationalisation. Some measures specifically targeted at SMEs.
  - Retail-specific: **Retail Reactivation Plan (ES)** - training skills, digitization, small business competitiveness, increased consumer confidence and awareness, public-private collaboration. **National Recovery Plan (IT)** – concrete actions to support retail at the local level.
- Stakeholders' views important: examples of sector-specific surveys of companies (PL, PT) or consultation forums (IE)



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Equity losses per ecosystem, share of total ecosystems losses



Source: Commission SWD "Europe's moment: repair and prepare for the next generation":

[https://ec.europa.eu/info/sites/info/files/economy-finance/assessment\\_of\\_economic\\_and\\_investment\\_needs.pdf](https://ec.europa.eu/info/sites/info/files/economy-finance/assessment_of_economic_and_investment_needs.pdf)



## Beyond funding

- Single Market for services is a key driver for recovery;
  - Single Market Barriers Report – 10.03.20 - COM(2020) 93 final
  - Enforcement Action Plan – 10.03.20 - COM(2020) 94 final
    - Renewed partnership with MS
    - SMET - Single Market Enforcement Task Force
- Annual strategic report on the single market – planned for January 2021

## Best Practices

- **To guide Member States** in their reforms towards a more open, integrated and competitive retail market without putting at risk the pursuit of legitimate public policy objectives (such as town and country planning including the protection of city-centres, protection of environment and of consumers).
- **To offer advice** on how best to apply EU rules providing examples of tried-and-tested reforms in EU Member States.

➡ Very different situation in the Member States

## Retail Restrictiveness Indicator

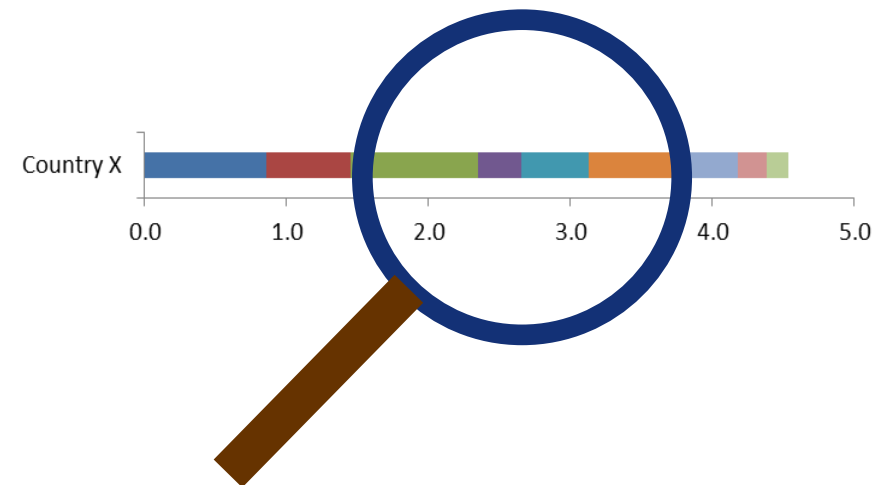
- a **snapshot** of restrictions in Member States
- a **dynamic monitoring tool** to measure Member States' efforts in reducing retail restrictions
- a useful **tool to measure the impact** of retail regulations in Member States and the impact of reforms on market performance

✓ national/regional

✓ regulatory

✓ retail-specific

**Not a ranking of countries!**



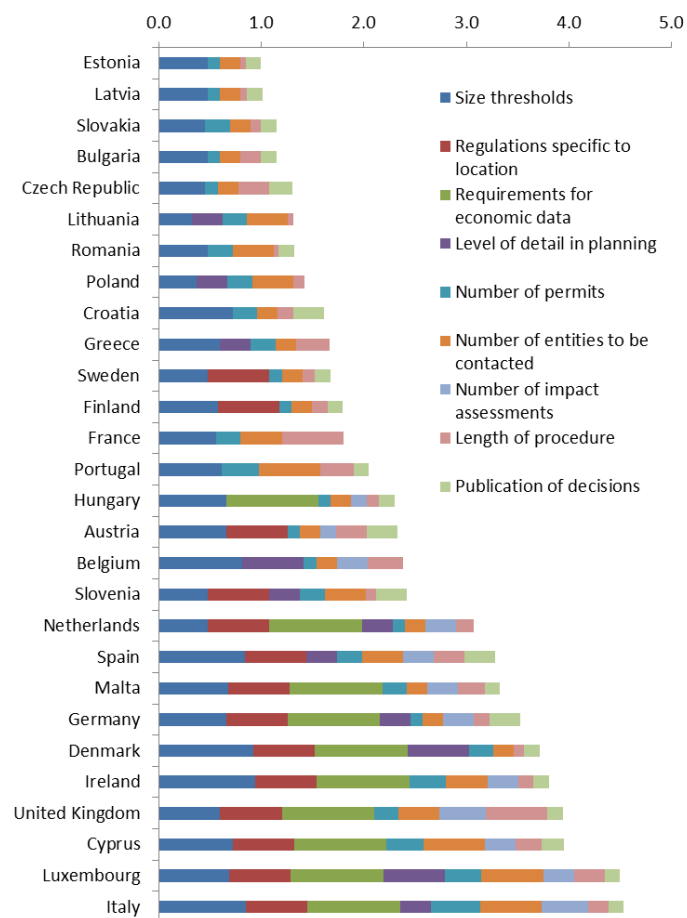
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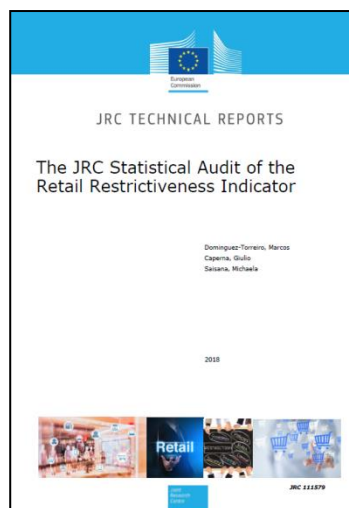
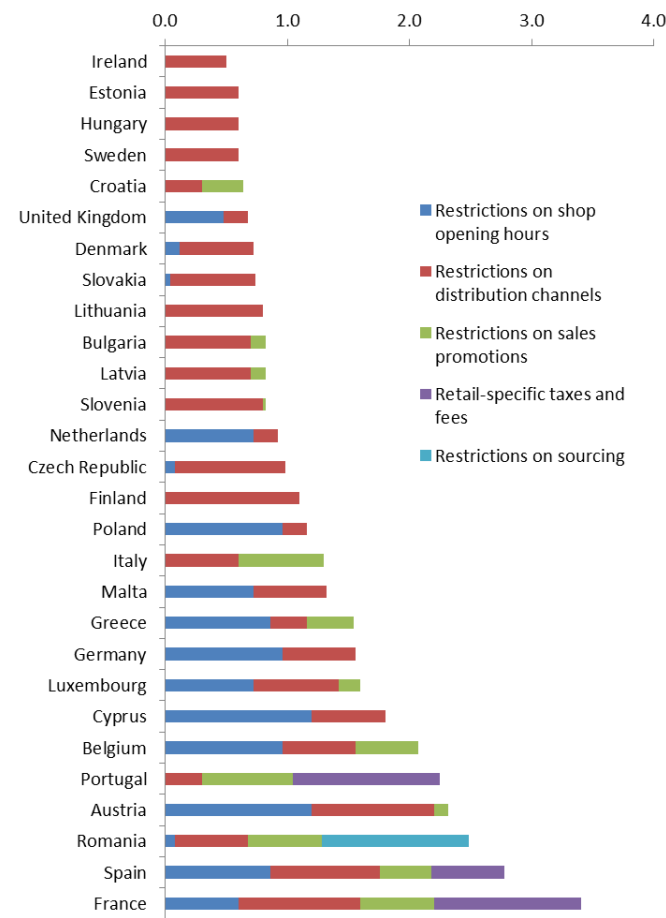
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## Retail Restrictiveness Indicator scores

Retail establishment restrictions pillar



Retail operations restrictions pillar



## Potential economic impacts

Reducing restrictions is likely to have positive effects on the functioning of the market.

### A less restrictive regulatory environment:

- encourages more firms to enter and allows them to scale up
- gives retailers more flexibility to adapt to consumers' needs
- stimulates innovation and increases competition

= success of more efficient and innovative firms, increased productivity, more choice and variety for consumers, positive spill-over effects to other sectors.



## A Guide for revitalising and modernising the small retail sector

- targets the actions a local authority can take to help small retailers remain competitive, particularly to embrace technological change
- aims to lead local authorities through the process of identifying needs and developing a local strategy, built on solutions, which have worked elsewhere in the EU
- each solution is illustrated by real life examples – success stories – gathered from the best practices across the EU – together with top tips to consider



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## THANK YOU!

Mònica Riera – Packaging Cluster  
Aleix Iglesias – Foodservice Cluster

11 Nov 2020



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