



EUROPEAN CLUSTER
COLLABORATION PLATFORM



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EU

EU survey on disruptions

500 responses from business, clusters, EEN during April 2022

Loss of input

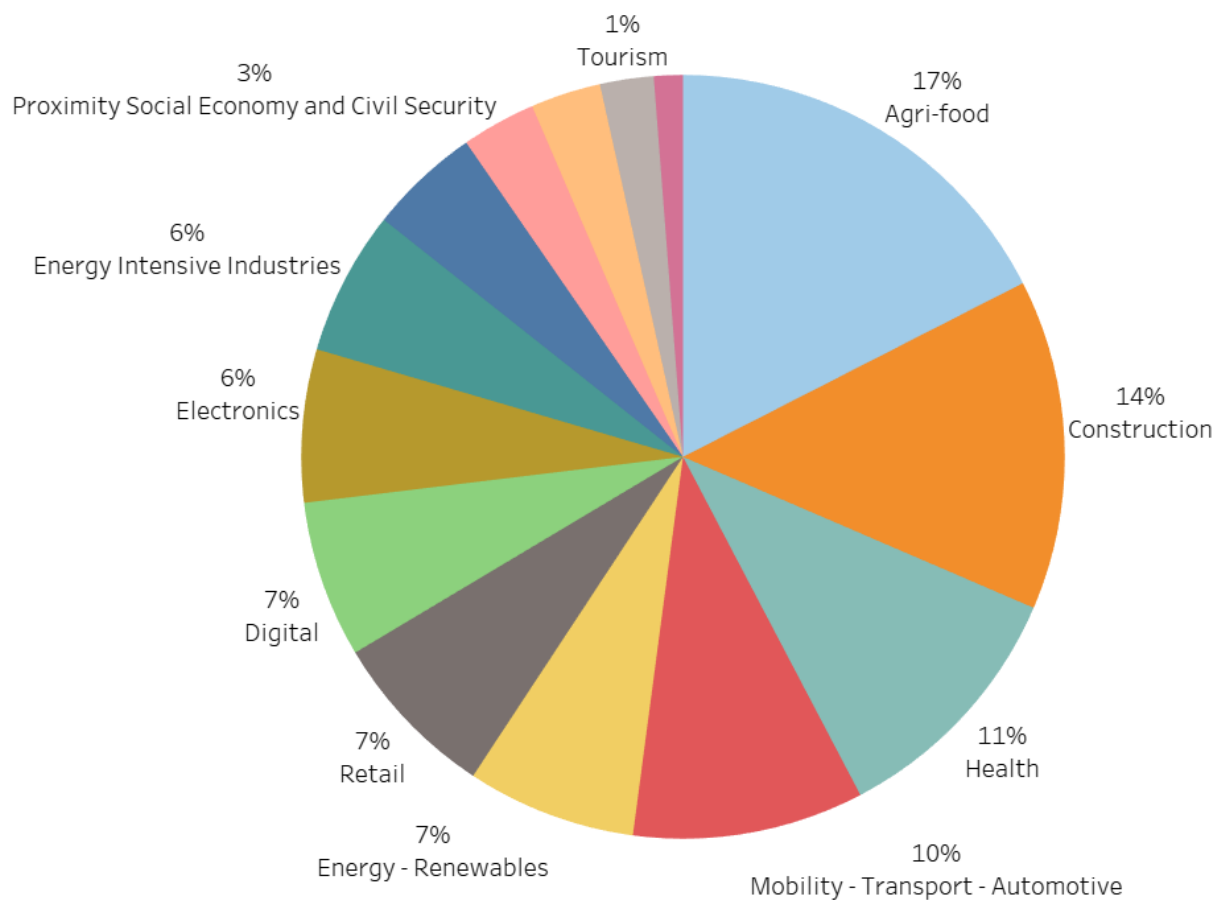
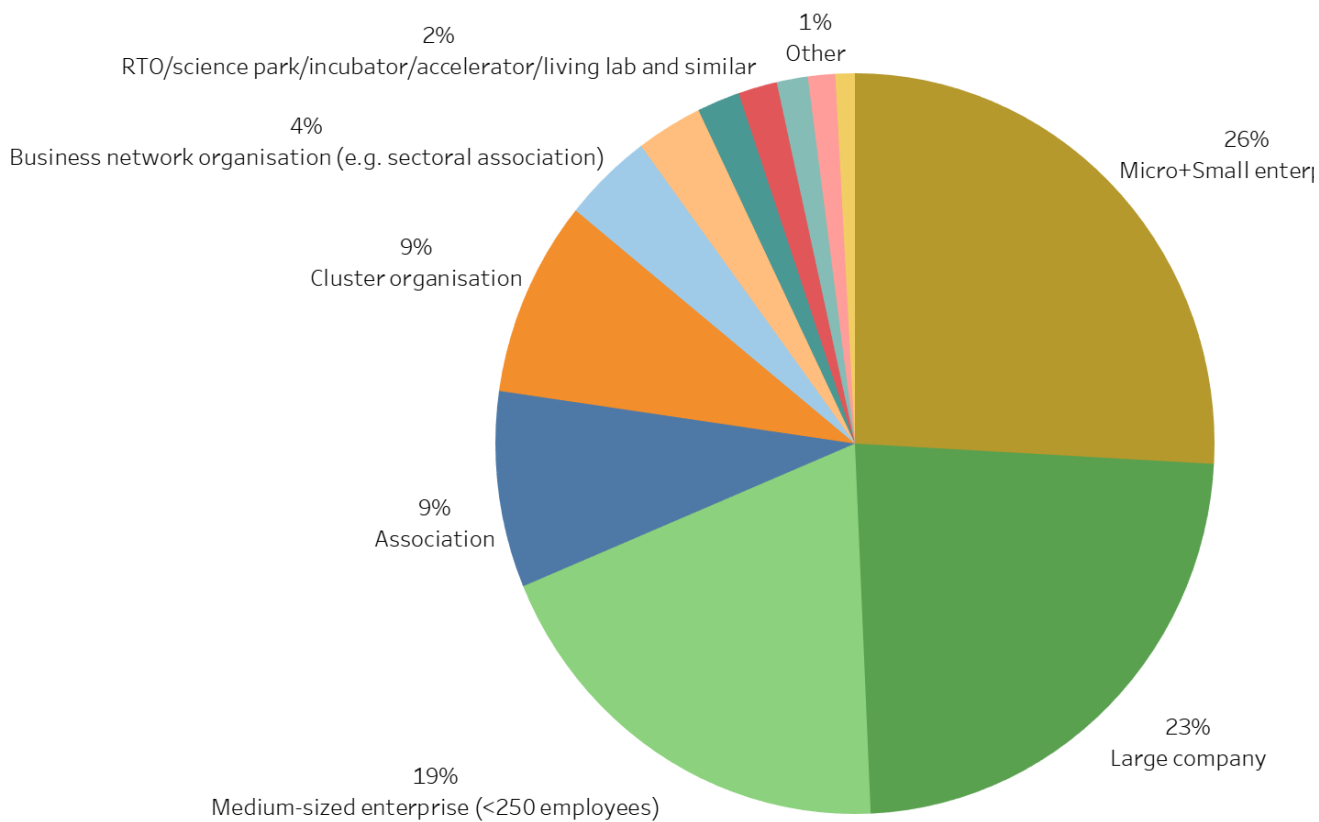
Loss of market

How critical for the business (high, medium, low)

At which stage of value chain

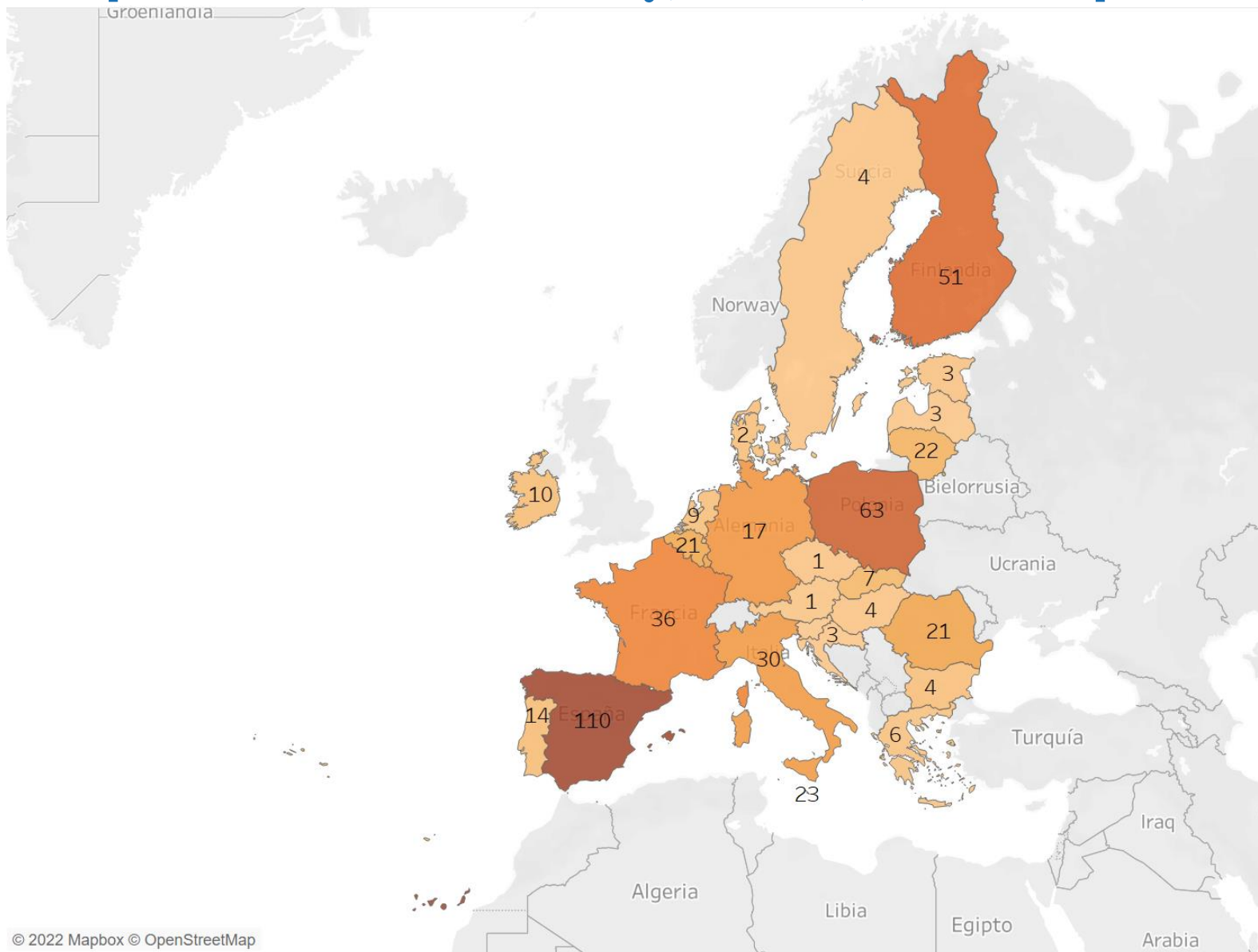
Suggestions for actions

70% responses come directly from companies. Half of 500 answers from Agri-Food, Construction, Health and Mobility-Transport-Automotive



Responses mainly from Spain, Poland, Finland, France, Lux, Italy

Underrepresentation of Germany, Austria, Czech Rep.



Spain	110
Poland	63
Finland	51
France	36
Luxembourg	31
Italy	30
Malta	23
Lithuania	22
Romania	21
Belgium	21
Germany	17
Portugal	14
Ireland	10
Netherlands	9
Slovak Republic	7
Greece	6
Sweden	4
Hungary	4
Bulgaria	4
Latvia	3
Estonia	3
Croatia	3
Denmark	2
Slovenia	1
Czechia	1
Austria	1
Grand Total	497

Keywords groups for disruptions - global

Main horizontal issues mentioned: transport and energy costs, access to raw materials, delays in deliveries, financing of operations, displaced workers

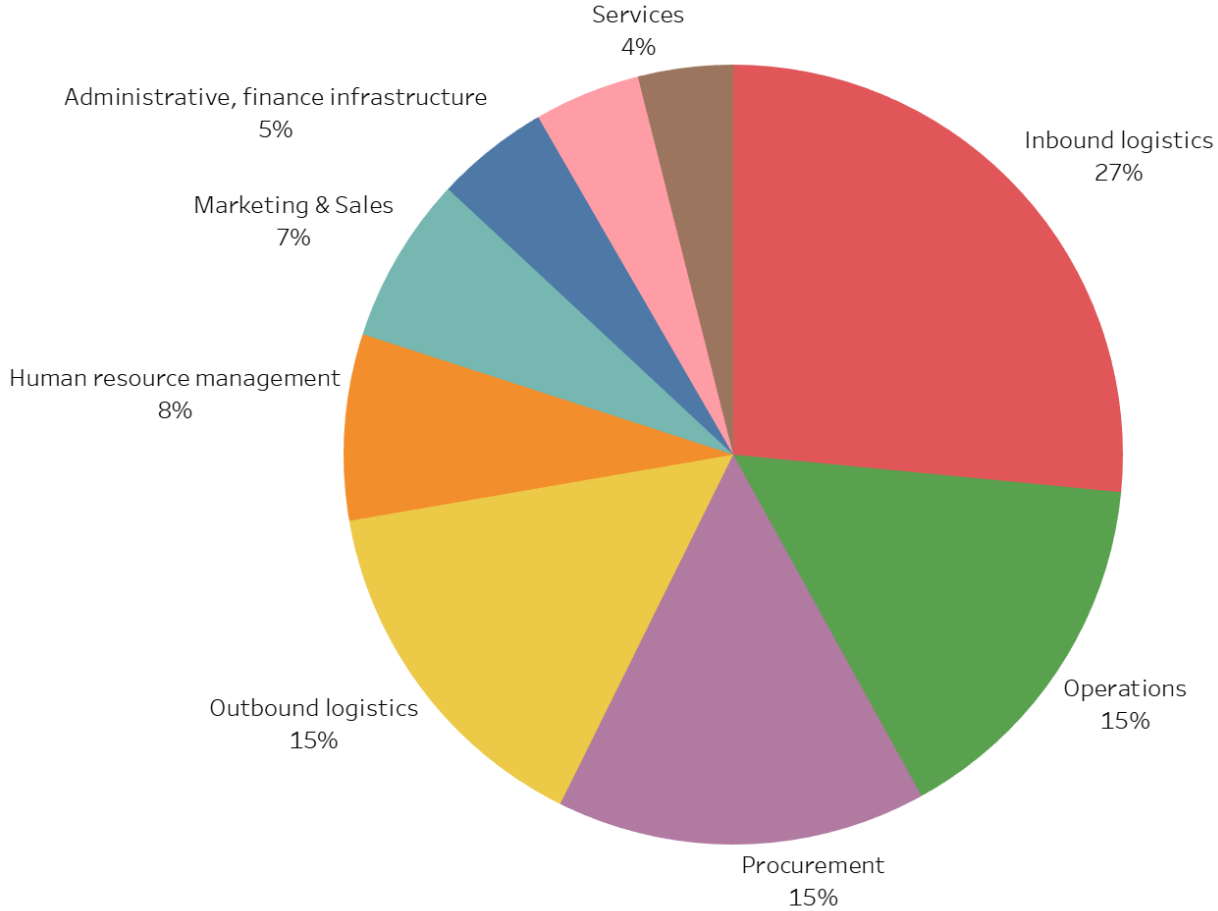


logistics	296
energy	226
raw materials	188
metals	142
financing	94
agri-food materials	63
wood	49
electronic components	40
oil	20
displaced workers	15
construction materials	15
medical supplies	14

Disruptions reported by Stage

Supply value chains stage (Stages)

Administrative, finance infrastructure	5%
Human resource management	8%
Inbound logistics	27%
Marketing & Sales	7%
Operations	15%
Outbound logistics	15%
Procurement	15%
Research and development	4%
Services	4%



Distortions vary by ecosystem. All ecosystems affected by logistics, Construction also by energy and metals; Agri-Food by agri-food materials (incl. fertilisers); Digital, Electronics and Health by lack of raw materials

Industrial Ecosystems

Keyword group	Aerospa..	Aqri-food	Construc..	Cultural..	Digital	Electroni..	Energy - ..	Energy I..	Health	Mobility..	Proximit..	Retail	Textile	Tourism
logistics	12	38	33	5	12	23	20	19	31	27	10	30	7	6
energy	3	27	41	1	11	7	32	23	15	24	7	6	3	5
raw materials	10	21	18	2	14	11	12	15	22	23	5	8	2	2
metals	6	13	41		5	5	20	9	7	13	7	2		3
financing	1	6	14	2	8	7	13	10	8	8	1	3	1	3
agri-food materials	2	31	2	1	3	3	3	3	1	4	4		1	2
wood		3	12	2	1	1	2	13	2	2	2	1		1
electronic components	6				4	9	6		8	3		1		
oil		15	1					1				2		
construction materials		1	9				1	1	2	1				
medical supplies	1	2					1	1	8	1				
displaced workers		1	3		2	1	2		1		3		1	
Grand Total	41	158	174	13	60	67	112	95	105	106	39	53	15	22

Stage by firm size: Distortions mainly in operations, inbound and outbound logistics and procurement

Supply value chains stage (Stages)	Type of entity (group)			Grand Total
	Large company	Medium-sized en..	Micro+S mall ent..	
Administrative, finance infrastructure	2%	1%	2%	4%
Human resource management	2%	2%	3%	7%
Inbound logistics	9%	8%	11%	28%
Marketing & Sales	2%	2%	3%	7%
Operations	5%	4%	6%	15%
Outbound logistics	5%	4%	7%	16%
Procurement	7%	5%	4%	16%
Research and development	1%	1%	2%	4%
Services	1%	0%	2%	3%

Around 100 affected products mentioned in this survey

alloys, aluminium, aluminium, anthracite, automotive components, birch plywood, cartons, cement, ceramic, cereals, chocolate, coke, colored metals, concrete, coolant, copper, corrugated board sheet, eggs, electronic components, engines, engines, fertilisers, fish, flights, furniture, glass, graphite, honey, hot-rolled plates, insulation material, iron ore, iron, iron, lime, limestone, medicines, metal cans, metals, milk, motors, nabina oil, nickel, nickel, non-linear crystals, palladium, paper, paper packaging, paper tissue, plastics, plywood, powder proteine, radioisotopes, rapeseed oil, red fruits, round wood, rubber, sawmills, semiconductors, softwood timber, soya oil, soyabeans, special metals, starch, steel, sugar, sunflower (oil, lecithine, seeds), synthetic rubber, textile, tiles, titanium oxide, titanium, wood

The survey respondents propose suggestions for solutions

raw materials/intermediate inputs

- Export ban for wood
- Import quota relaxing for iron, alloys
- Suspension of EU import duties for N, NP fertilizers

energy/fuel/gas

- create renewable energy agency,
- push for investments in renewable energy in various forms
- preferential loans, awareness raising, partner finding

electronics

- more investment push,
- diversify partners for supply across the world

Logistics

- Ensure supply of truck drivers and sailors

Detailed example of the disruption and actions proposed

Ecosystem	Disruption	Actions suggested
Agri-Food	Shortage in fertilizers supply	<ul style="list-style-type: none"> - substitution of chemical raw materials from Russia as the possibility to purchase from other non EU-countries exists. To do so, a moratorium on Reach criteria (RUE 1907/2006) of one year at least shall be necessary. Temporary derogation of REACH registration obligations - temporary relief of the cadmium limit in the EU Fertilising Products Regulation to help the supply of phosphate - encourage farmers to use sustainable fertilizers such as biostimulants, organic soil improvers, organic and organo-mineral fertilizers - financing of energy conversion to a more sustainable production of fertilizing products - facilitation of sustainable fertilizers marketing in conformity to RUE 2019/1009 through, for example: <ul style="list-style-type: none"> --> postponing at least one year the obligation of the assessment by a notified body to sell fertilizing products --> immediate definition of end-point for processed animal by-products used as organic fertilisers and soil improvers (such as processed manure, meat meal, bone meal, hydrolysed proteins, blood, hides and skins, hoofs and horns, guano, wool and hair, feather and downs, pig bristles, etc.) - faster and easiest supplying organic fertilizers/biostimulants by a real application of the mutual recognition principle as defined on regulation RUE 2019/515, avoiding the prior authorization principle existing in some countries that generate important delays on the availability of the fertilizing products on the European market. - Incentive system to enable farmers and retailers to purchase fertilisers as usual during te pre-storage period - Possibility to use packaging pre-printed according to EC/2003/2003 by attaching leaflet in compliance with EU 2019/1009 - Extend the transition period foreseen in Art 52 of Regulation (EU) 2019/1009 by at least 12 months to ease bottlenecks in the supply of fertilizing products through the 2023 spring planting

Next steps

Publish survey report: mid-May currently under preparation

Survey on solutions: launch 18 May 2022

Solution survey report publication: scheduled mid-June

Thank you



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