



Interreg



EUROPEAN UNION

Danube Transnational Programme

DanuBioValNet

Regional cluster landscape Serbia

WP3 Value Chain Mapping

Activity 3.2 Cluster Mapping

Output 3.2 Cluster Mapping as an Analytical Tool

D3.2.1 Regional cluster landscapes and one entire cluster landscape for Danube Region

***Cross-clustering partnership for boosting eco-innovation
by developing a joint bio-based value-added network for the Danube Region***



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CLUSTER MAPPING FACT SHEETS

In the following the cluster mapping results of selected clusters and cluster initiatives in Serbia in the field of Eco-Construction, Bio-based Packaginging

and Phytopharmaceuticals are presented. Besides the mapping as such, additional informations are given about age, size, key objectives etc.

ECO-CONSTRUCTION

Names of cluster organisations/initiatives:

- **TIMBER CLUSTER**, established in 2010 in Belgrade; 12 relevant members in wood-processing/eco-construction industry (19 members in total);
- **KLASTER DUNDJER**, established in 2008 in Niš; 13 relevant members in construction/eco-construction industry (25 members in total).

Short Description of the cluster/cluster initiative:

- **TIMBER CLUSTER** operates in the fields of wood-processing, construction and related industries.

Its members cover the value chain of the wood-processing industry starting from sawn wood: processing and production of products with high added value to support services, development cooperation and education.

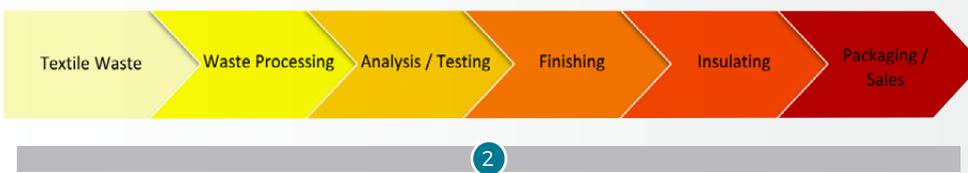
- **DUNDJER CLUSTER** operates in the fields of building construction and related industries, including insulation material production. Its members cover the value chain production of insulation material from textile waste from waste collection to sales of finished product.

Cluster Visual Map of value chains:

The cluster map visual presentation sample is in figure below.



- 1) **TIMBER CLUSTER**, 12 relevant members: sawmill, wood-based panels, laminated chipboard, furniture from solid wood, wooden furniture, doors, frame walls, facades, wooden constructions and materials for wooden buildings, wooden houses



- 2) **DUNDJER CLUSTER**, 13 relevant members: design, testing, construction, production of building and insulation material

1) <http://www.timbercluster.com>

2) <http://www.dundjer.co.rs>

Picture 1: Value chain visualisation - TIMBER CLUSTER



Numbers indicate amount of companies in the respective value-adding step.

Picture 2: Value chain visualisation - DUNDJER CLUSTER



Numbers indicate amount of companies in the respective value-adding step.

Services offered by cluster organisation

Active participation in the communication between business, public and other organizations in the frame of the business environment improvement for the entrepreneurs and enterprises in eco-construction sector. Support of the innovative, entrepreneurial and educational activities of their members.

List and short description of other key actors in bioeconomy including those with strong cooperation between SMEs and research in your region/country:

- **Leading clusters:**

- TIMBER CLUSTER, Belgrade
- DUNDJER CLUSTER, Niš

- **Key industrial leaders:**

- Bronja doo, Novi Pazar

- Can-Impex, Beograd
- Simpo ŠIK, Kursumilja
- Kronošpan, Lapovo
- ŠPIK Iverica, Ivanjica
- Tri Jele, Kraljevo
- Impregnacija, Cicevac
- Jeladom, Vrnjacka banja
- Piramida, Sremska Mitrovica
- LKV Centar, Beograd
- VAGRES-INŽENJERING d.o.o. Niš
- **Competent research and academia:**
 - Faculty of Forestry, Belgrade
 - Faculty of Civil Engineering, Belgrade,
 - Faculty of Architecture Belgrade,
 - Faculty of Mechanical Engineering Belgrade,
 - Faculty of Technology, Belgrade,
 - Construction-architectural Faculty Niš

- **Important policy and decision makers:**
 - Ministry of Agriculture, Forestry and Water Management
 - Ministry of Environmental Protection;
 - Ministry of Economy

- **Other key relevant stakeholders:**
 - Association "Green building"

PHYTOPHARMA

Names of cluster organizations/initiatives

- **HERBAL PHARMANET**, established in 2012 in Obrenovac; 9 relevant members phyto-pharmaceutical industry (16 members in total).

Short Description of the cluster/cluster initiative

- **HERBAL PHARMANET** operates in the fields of phytopharmaceutical industry. Its members cover the entire phytopharma value chain from suppliers of raw material, processing and production of semi-products to herbal drugs/medicines, dietary supplements, natural cosmetics - the products with high added value.

Cluster Visual Map of value chains:

The Cluster map visual presentation is in figure below.



- 1 **HERBAL PHARMANET**, 9 relevant members: collection/cultivation, seeds production, production of floral and herbal ingredients, drying of medical herbs, processing of herbs for teas, herbal extracts, herbal drugs/medicines and dietary supplements, natural cosmetics

Picture 3: Value chain visualisation - HERBAL PHARMANET

Herbal Pharma Net

- | | |
|---|-----------------------------------|
| ■ Cultivation | ■ Harvesting |
| ■ Storage / Transport / Trading | ■ Analysis / Testing / Developing |
| ■ Pretreatment (Drying, Grinding, Separation) | ■ Extraktion (Solid-Liquid,..) |
| ■ Purification | ■ Formulation / Capsuling |
| ■ Packaging | ■ Sales |



Numbers indicate amount of companies in the respective value-adding step.

Services offered by cluster organisation

Active participation in the communication between business, public and other organizations in the frame of the business environment improvement for the entrepreneurs and enterprises in phytopharma sector. Support of the innovative, entrepreneurial and educational activities of their members.

List and short description of other key actors in bioeconomy including those with strong cooperation between SMEs and research in your region/ country

- **Leading clusters**

- HERBAL PHARMANET, Obrenovac

- **Key industrial leaders**

- MELISA FARM, Apatin
- PHARMANOVA DOO, Obrenovac
- HERBA d.o.o, Beograd
- Fructus d.o.o., Novi Sad
- Macval d.o.o, Novi Sad

- HERBA SVET DOO, Beograd
- EKO-FARM doo, Novi Sad
- ESENSA DOO, Beograd
- ALTERNATIVA MEDICA, Loznica
- Institut Dr Josif Pančić, Beograd

- **Competent research and academia:**

- Faculty of Pharmacy, Belgrade
- Faculty of Agriculture, Belgrade
- Faculty of Agriculture, Novi Sad
- Faculty of Technology, Belgrade
- Institute for the of Medicinal Herbs Study, Beograd
- NS Seeds - Department of Organic Production and Biodiversity, Backi Petrovac

- **Important policy and decision makers:**

- Ministry of Industry and Trade;
- Ministry of Agriculture;
- Ministry of Environment.

- **Other key relevant stakeholders:**

- Ministry of Health
- Ministry of Economy

ADVANCED BIO-BASED PACKAGING

There is a cluster initiative dedicated to support the emergence of the advanced bio-based packaging industry, cluster VOJPLAST, Subotica. The cluster organization is not active at the moment, has standstill legal status. The reason for the inactivity is the weak position of the packaging industry

in Serbia and the lack of the stakeholders support to cluster organization. The cluster will be kept informed about the progres of the DanuBioValNet project implementation, and the opportunity for their involvemnet might arise in the course of the Project.

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