

# Luxembourg Materials Cluster

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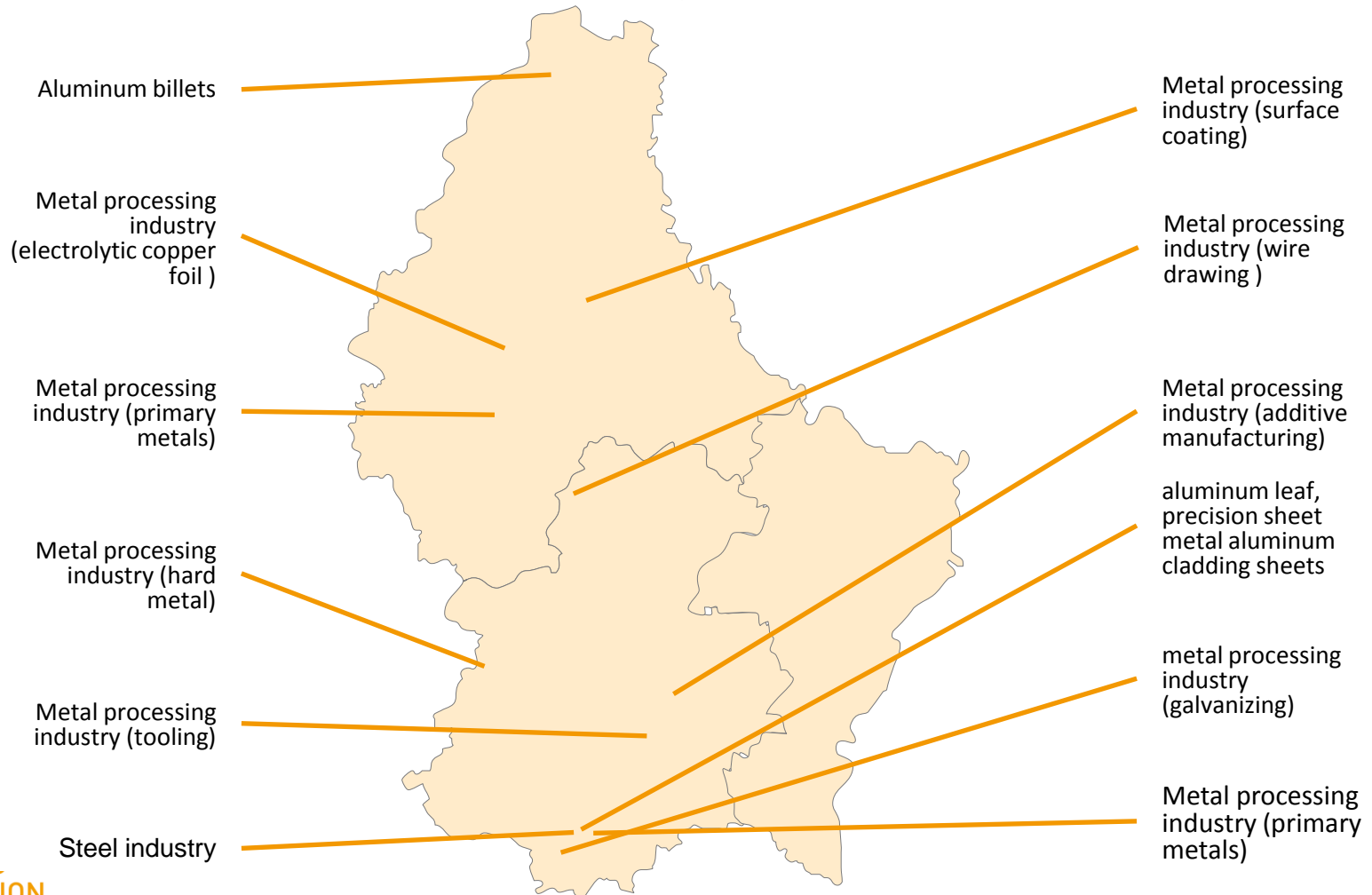
Cluster Presentation 2014



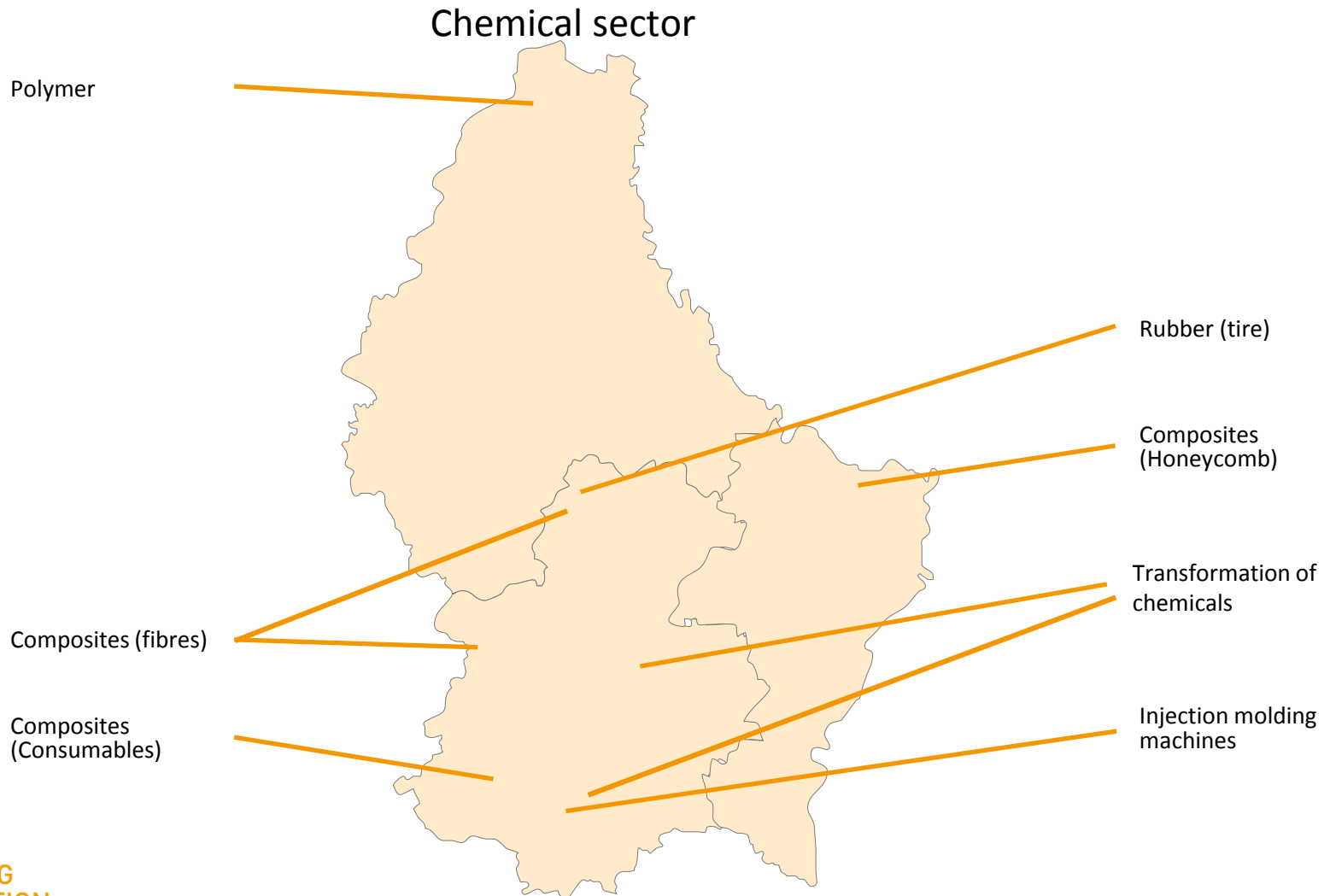
# The industrial structure of Luxembourg

# Many sectors reflecting the diversity of the industrial structure of Luxembourg.

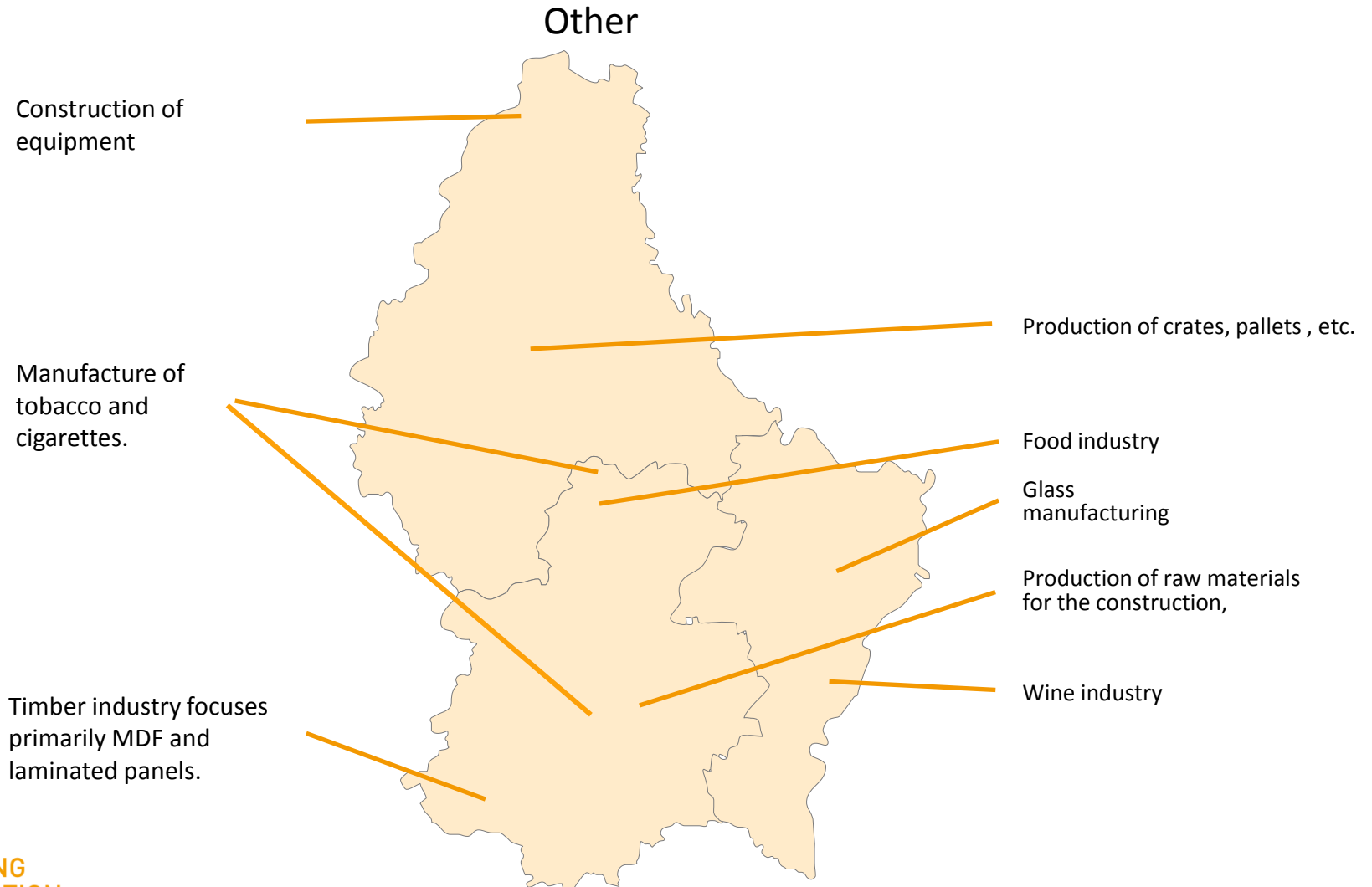
## Metal industry



# Many sectors reflecting the diversity of the industrial structure of Luxembourg.



# Many sectors reflecting the diversity of the industrial structure of Luxembourg.



- Industry sector employs about 36.200 people ( $\approx 34.000$  in 1995)
- PIB: 6.3%
- Exportation: 85% of produced goods
- Steel products represent less than 1/3 of total value
- Trading: (2012)
  - Export:
    - 81% to EU
      - 28% to Germany
      - 15% to France
      - 12% to Belgium.
    - 5,2% to US
    - 5,6% to Asia
  - Imports
    - 91% EU
      - 28,5% Germany
      - 11,8% France
      - 35,0% Belgium.
    - 4,7% US
    - 2,0% Asia



# Luxembourg Materials Cluster

- The Cluster serves all its members as a **neutral coordination, information and communication platform**
- The Cluster drives its members to **innovate and develop new skills** in the area of material and production technologies
- Provide a portfolio of **value-added services** to support Cluster actors
- The cluster supports its members to gain a leading position in the field of Materials & Production Technologies with high **international visibility**
- **Fosters the collaboration** between private, public and institutional actors

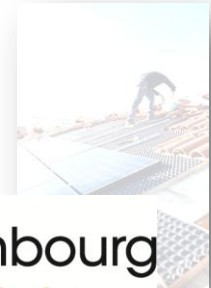


# The Luxembourg Materials Cluster



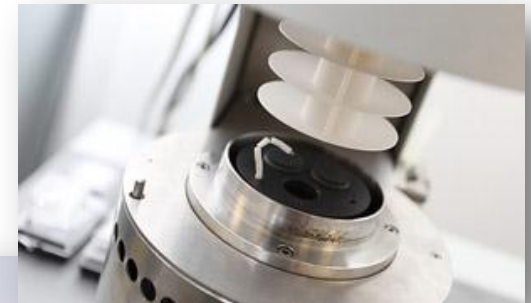
## 33 members

- 25 companies
- 2 service providers
- 4 public research organisations
- 2 strategic partners



## Latest additions (Dec 2013)

- Federal Mogul
- Saturn Technology
- Textilcord
- Atelier Nic Georges



## Roadmap based on 5 pillars



**Aim: Identify technology needs, determine companies assets and visions  
explore market opportunities, create new business activities**

## **Activities:**

- **Market studies: e.g. : “additive manufacturing”**
- **Cartography of cluster member**
- **Technology scouting, enabling competences**
  - Advanced Robotics
  - Modélisation
  - Rapid Protoyping
  - Additive manufacturing
  - Open Innovation
- **Get together - company visits**

**Aim: “Flagship projects”:** develop new product and service ideas up to the

- **Robotisation in PME**  
Bringing manufacturing back to Luxembourg
- **Rapid prototyping:**  
Benchmark 3D printing technology

**Aim: Position the Cluster as the key source of information about the sector, increase visibility of the Cluster and its members, providing a platform for members**

## **Activities 2014:**

- Revised Cluster Webpage
- Synchronize branding activities with LfB
- Cluster Member Catalogue
- Cluster Service Catalogue
- Cluster FORUM 2014

## Aim: Identify gaps in the local value chain

- Establish links to international clusters, organizations and innovation agencies

## Activities 2014:

- **Develop strategic partnerships with complementary regions or countries**
  - Germany, Denmark, Netherlands
- **IntermatGR**
  - Greater Region

## Prospection and promotion

**Aim: Increase visibility of the industrial sector, initiating new partnerships and attract new companies**

- **Represent cluster members on national and international trade fairs and exhibitions**
  - Hannover Messe 2014
  - Robotics days Paris
  - *Manufuture 2015 in Luxembourg*
- **Local contact point and access to the sector**
- **Sector-specific prospection missions**



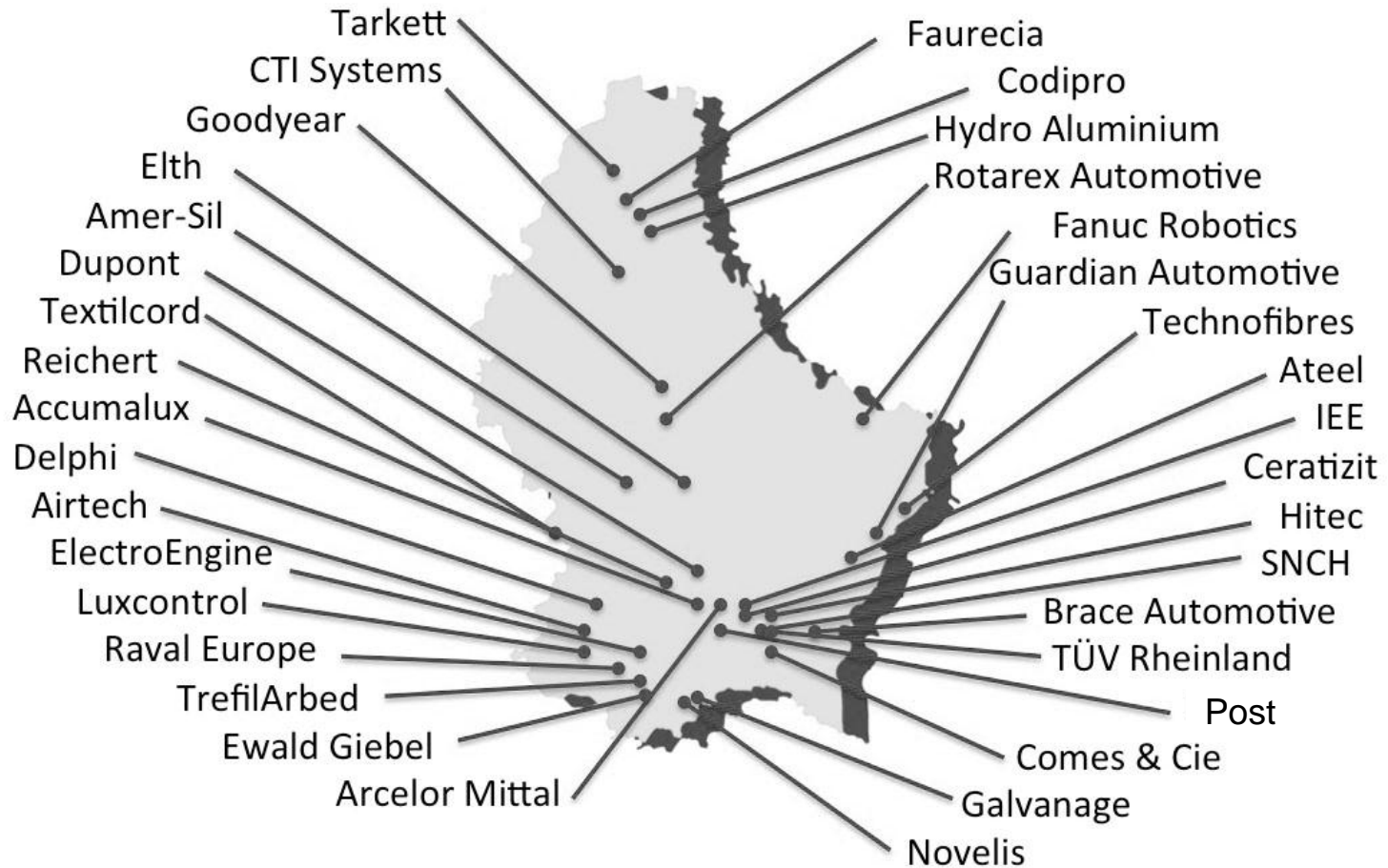
Luxembourg  
Automotive  
Components



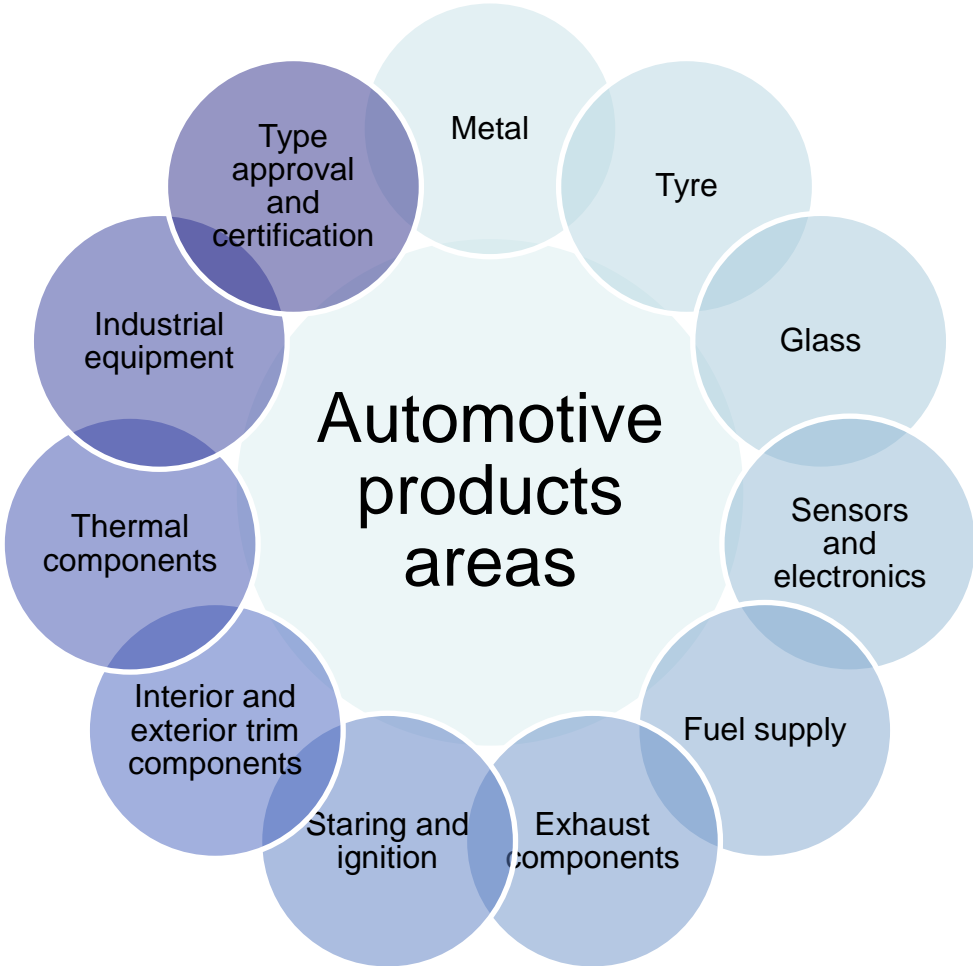
# Cluster Mission

- Supporting and enhancing existing automotive supply base
- Attracting new suppliers
- Industry & regulatory affairs
- Government Relations
- Education and Communication
- Driving the direction & pace of innovation

# Automotive sector



# Automotive product areas



# Key figures

- More than 1,5 billion € sales turnover
- Equal to 0,3 % of EU sales turnover in the automotive components industry
- Highest per capita automotive components turnover in EU
- More than 9000 employees, 1900 in R&D
- Exporting to 5 continents
- Major export countries are:  
Germany, France, Italy, UK, Japan, Spain, USA, Chine, Sweden

- Develop technology roadmap
  - Foster specific areas of local capabilities (mathematical modelling, simulation, testing)
  - Key areas:
    - Electro mobility
    - Autonomous driving
- R&D
  - PPPs
  - EU projects, international projects
- Education
  - set up training program for automotive industry
  - MBA in automotive, Engineering management, Project management, Product management, Business development, Quality management

# 5 years work plan

- Improved and adapted business environment
  - Automotive Campus
    - Resource sharing
    - Specialisation, Know-how
- Company acquisition and promotion
  - Identify potential candidates and follow-up upcoming opportunities  
select target regions
- Manufacturing
  - Competitive advantage: assessment of regional OEM decision-making process and criteria (proximity, flexibility...)
  - Logistics
  - Factories of the future, Manufuture,...