



CELEBio

D.2.3 BIO-ECONOMY STAKEHOLDERS IN SLOVENIA

*This project has received funding from the Bio Based Industries Joint Undertaking under the European Union's Horizon 2020 research and innovation programme under grant agreement **No 838087***

MAY 2020

GENERAL INFORMATION

Project title	CELEBio – Central European Leaders of Bioeconomy Website: https://celebio.eu
Project No.	838087
Financed from	Horizon 2020
Project leader	Iniziativa Centro Europea – Segretariato Esecutivo (INCE) Dr. Peter Canciani, Project Manager, canciani@cei.int
Partner countries	Bulgaria, Croatia, Czech Republic, Hungary, Italy, Netherlands, United Kingdom, Slovakia, Slovenia
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Work package	WP3, Assessment of biomass potentials and mapping stakeholders
Work package leader	Wageningen Research (WR), Dr. Berien Elbersen, Senior researcher land use and integrated environmental assessment, berien.elebersen@wur.nl
Activity	A.2.2 – Bioeconomy Stakeholders Mapping
Deliverable	D.2.2 – Report listing Bioeconomy stakeholders
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1 INTRODUCTION

The aim of this report is to present an overview of all actors and actor groups that need to be involved when setting up bioeconomy value chains. Stakeholders listed in this report are considered as current or future users of biomass in Slovenia.

The actors presented can be specific persons, companies, and other type of organisations (e.g. farmers organisations). In case of companies we focused on largest and/or most influential ones in a given sector. The results capitalise on AJPES database of business performance achieved in 2018.

For the actors presented in this report the following information is provided:

1. Entity's name
2. Entity's location in town/municipality
3. Entity's location in region
4. Turnover in millions of EUR
5. Number of employees
6. Sector in which the underlying entity operates

2 FOOD INDUSTRY

2.1 MEAT

Table 2.1: Main actors in "Meat" sector according to the data provided by AJ PES for the business year 2018

Company	Town	Region	Turnover (mio €)	Employees	Sector
PERUTNINA PTUJ	Ptuj	Podravska	164.833	1401	Processing and preserving of poultry meat
CELJSKE MESNINE	Celje	Savinjska	85.107	358	Production of meat, poultry meat products
JATA EMONA D.O.O.	Ljubljana	Osrednje-slovenska	72.478	244	Manufacture of prepared feeds for farm animals, breeding and sell of poultry
PANVITA	Gornja Radgona	Pomurje	61.850	293	Processing and preserving of meat
PIVKA PERUTNINARSTVO	Pivka	Notranjska	43.931	422	Processing and preserving of poultry meat
KRAS D.D.	Sežana	Obalno-kraška	39.932	171	Processing and preserving of meat
MESO KAMNIK D.D.	Kamnik	Osrednje-slovenska	32.735	130	Processing and preserving of meat

2.2 FRUIT AND VEGETABLES

Table 2.2: Main actors in "Fruit and vegetables" sector according to the data provided by AJ PES for the business year 2018

Company	Town	Region	Turnover (mio €)	Employees	Sector
ETA KAMINK D.O.O.	Kamnik	Osrednje-slovenska	20.332	136	Oth proc., preserv. of fruit, vegetables
PARADAJZ D.O.O.	Turnišče	Pomurje	9.346	70	Growing of vegetables and melons, roots and tubers
EVROSAD D.O.O.	Krško	Posavska	8.625	126	Growing of pome fruits and stone fruits

JERUZALEM ORMOŽ SAT D.O.O.	Ormož	Podravska	4.869	37	Growing of cereals (except rice), leguminous crops and oil seeds
KMETIJSKO GOSPODARSTVO LENDAVA D.D.	Lendava	Pomurje	2.441	30	Growing of cereals (except rice), leguminous crops and oil seeds

2.3 BEVERAGES

Table 2.3: Main actors in "Beverage" sector according to the data provided by AJPES for the business year 2018

Company	Town	Region	Turnover (mio €)	Employees	Sector
PIVOVARNA LAŠKO UNION D.O.O.	Ljubljana	Osrednje-slovenska	153.080	592	Manufacture of beer
RADENSKA D.D.	Radenci	Pomurska	40.151	267	Manufacture of soft drinks; production of mineral waters and other bottled waters
FRUCTAL	Ajdovščina	Primorska	40.080	280	Manufacture of fruit and vegetable juice

2.4 DAIRY PRODUCTS

Table 2.4: Main actors in "Dairy products" sector according to the data provided by AJPES for the business year 2018

Company	Town	Region	Turnover (mio €)	Employees	Sector
LJUBLJANSKE MLEKARNE	Ljubljana	Osrednje-slovenska	168.609	606	Operations of dairies and cheese making
INCOM D.O.O.	Ajdovščina	Goriška	65.365	397	Manufacture of ice cream
MLEKARNA CELEIA D.O.O.	Petrovče	Savinjska	61.182	213	Operations of dairies and cheese making
POMURKSE MLEKARNE D.D.	Murska Sobota	Pomurska	35.308	126	Operations of dairies and cheese making
EKOLAT D.O.O.	Vipava	Goriška	12.075	31	Operation of dairies and cheese making
MLEKARNA PLANIKA D.O.O.	Kobarid	Goriška	10.403	70	Operation of dairies and cheese making

2.5 CEREAL-BASED FOODS, BAKERY, SWEETS

Table 2.5: Main actors in "Cereal-based foods, bakery, sweets" sector according to the data provided by AJPES for the business year 2018

Company	Town	Region	Turnover (mio €)	Employees	Sector
ATLANTIC DROGA KOLINSKA D.O.O.	Ljubljana	Osrednje-slovenska	169.226	433	Processing of tea and coffee)
ŽITO	Ljubljana	Osrednje-slovenska	102.313	701	Manufacture of bread and fresh pastry goods
MLINOTEST	Ajdovščina	Primorska	55.322	477	Manufacture of bread and fresh pastry goods
PEKARNA PEČJAK	Škofljica	Osrednje-slovenska	35.542	341	Manufacture of bread and fresh pastry goods
DON DON	Grosuplje	Osrednje-slovenska	31.418	319	Manufacture of bread and fresh pastry goods

2.6 CLUSTERS AND ORGANISATIONS

Most relevant clusters and organizations in food sector:

- **Chamber of Agricultural and Food Enterprises¹**

3 ACTORS IN FORESTRY AND WOOD PROCESSING INDUSTRY

3.1 ACTORS IN PRIMARY FOREST SECTOR

Table 3.1: Main actors in "Forest" sector according to the data provided by AJPEs for the business year 2018

Company	Town	Region	Turnover (mio €)	Employees	Sector
SiDG d. o. o.	Kočevje	Osrednjeslovenska	74.810	211	Silviculture and other forestry activities
MERKSCHA d.o.o.	Celje	Savinjska	21.657	176	Logging
EXTRAFORM d.o.o.	Prestranek	Primorsko-notranjska	21.043	24	Support services to forestry
MBS LIST d.o.o.	Stari trg pri Ložu	Primorsko-notranjska	12.830	51	Support services to forestry
GOZDARSTVO GRČA d.o.o., Kočevje	Kočevje	Osrednjeslovenska	9.272	57	Sawing, planing and impregnation of wood
SNEŽNIK d.o.o.	Kočevska Reka	Osrednjeslovenska	9.001	95	Sawing, planing and impregnation of wood

3.2 ACTORS IN WOOD AND WOOD-PROCESSING INDUSTRY

Table 3.2: Main actors in "Wood and wood-processing" sector according to the data provided by AJPEs for the business year 2018

Company	Town	Region	Turnover (mio €)	Employees	Sector
NOVEM CAR INTERIOR DESIGN	Žalec	Savinjska	123.243	753	Manufacture of luxury wooden parts for automobile interior
INOTHERM d.o.o.	Prigorica	Osrednje-slovenska	59.389	243	Manufacture of other builders' carpentry and joinery
LESONIT	Ilirska Bistrica	Primorsko-notranjska	48.185	137	Manufacture of veneer sheets
ADRIA DOM d.o.o.	Kanižarica	Jugovzhodna	30.422	216	Manufacture of veneer sheets
M SORA	ŽIRI	Gorenjska	28.864	200	Manufacture of other builders' carpentry
LIP LESNA INDUSTRIJA BLED	Bled	Gorenjska	28.962	201	Manufacture of veneer sheets

MARLES HIŠE MARIBOR	Maribor	Podravska	24.206	121	Manufacture of other builders' carpentry
LIP OPAŽNE PLOŠČE BOHINJ	Bohinjska Bistrica	Gorenjska	22.823	215	Manufacture of veneer sheets
INLES	Ribnica	Notranjska	21.314	250	Manufacture of other builders' carpentry

3.3 CLUSTERS AND ORGANISATIONS

Most relevant clusters and organizations in forestry and wood processing industry:

- **Furniture and Wood Processing Association²**

4 ACTORS IN THE WASTE SECTOR

Table 4.1: Main actors in "Waste" sector according to the data provided by AJPES for the business year 2018

Company	Town	Region	Turnover (mio €)	Employees	Sector
KOSTAK d.d.	Krško	Posavska	69.769	397	Collection and transport of municipal waste
JP VOKA SNAGA d.o.o.	Ljubljana	Osrednje-slovenska	41.126	336	Collection and transport of municipal waste
SAUBERMACHER SLOVENIJA d.o.o.	Murska Sobota	Pomurska	30.662	214	Collection and transport of municipal waste
KOMUNALNO PODJETJE VELENJE, d.o.o.	Velenje	Savinjska	24.349	174	Collection and transport of municipal waste
KOMUNALA KRANJ d.o.o.	Kranj	Gorenjska	20.270	203	Collection and transport of municipal waste
MARJETICA KOPER, d.o.o.-s.r.l.	Koper	Obalno-kraška	18.486	226	Collection and transport of municipal waste
SIMBIO d.o.o.	Celje	Savinjska	17.472	213	Collection and transport of municipal waste
SNAGA d.o.o.	Maribor	Podravska	13.950	228	Collection and transport of municipal waste
KOMUNALA PTUJ d.d.	Ptuj	Podravska	12.960	150	Collection and transport of municipal waste
KOMUNALA Nova Gorica d.d.	Nova Gorica	Goriška	9.876	146	Collection and transport of municipal waste

4.1 CLUSTERS AND ORGANISATIONS

Most relevant clusters and organizations in waste sector:

- Chamber of Public Utilities³

5 ACTORS IN BIO-BASED INDUSTRIES AND MARKETS

5.1 CHEMICAL AND PETRO-CHEMICAL INDUSTRIES

Table 5.1: Main actors in the sector "Manufacture of chemicals and chemical products" according to the data provided by AJPEs for the business year 2018

Company	Town	Region	Turnover (mio €)	Employees	Sector
* AquafilSLO d.o.o.	Ljubljana	Osrednjeslovenska	246.542	856	Manufacture of man-made fibres
* Helios TBLUS d.o.o.	Domžale	Gorenjska	203.205	788	Manufacture of paints, varnishes and similar coatings, printing ink and mastics
CINKARNA Celje, d.d.	Celje	Savinjska	163.960	876	Manufacture of dyes and pigments
* Frutarom Etol d.o.o.	Škofja vas	Savinjska	65.631	227	Manufacture of essential oils
TKK d.o.o.	Srpenica	Gorenjska	64.437	214	Manufacture of paints, varnishes and similar coatings, printing ink and mastics
JUB d.o.o.	Dol pri Ljubljani	Osrednjeslovenska	63.280	343	Manufacture of paints, varnishes and similar coatings, printing ink and mastics
* MELAMIN Kočevje d.d.	Kočevje	Jugovzhodna	50.882	183	Manufacture of plastics in primary forms
ISTRABENZ PLINI d.o.o.	Koper	Obalno-kraška	46.217	141	Manufacture of industrial gases
FENOLIT d.d.	Borovnica	Osrednjeslovenska	44.891	93	Manufacture of glues
HENKEL SLOVENIJA d.o.o.	Maribor	Podravska	39.911	29	Manufacture of soap and detergents, cleaning and polishing preparations
HENKEL MARIBOR d.o.o.	Maribor	Podravska	38.273	529	Manufacture of perfumes and toilet preparations
Albaugh TKI d.o.o.	Rače	Podravska	36.886	101	Manufacture of pesticides and other agrochemical products

ECOLAB d.o.o.	Maribor	Podravska	34.773	100	Manufacture of soap and detergents, cleaning and polishing preparations
ATOTECH SLOVENIJA d.d.	Podnart	Gorenjska	32.024	71	Manufacture of other chemical products n.e.c.
TKI HRASTNIK, d.d.	Hrastnik	Zasavska	26.620	139	Manufacture of other inorganic basic chemicals
MESSER SLOVENIJA d.o.o.	Ruše	Podravska	23.301	106	Manufacture of industrial gases
NAFTA - PETROCHEM d.o.o. - V STEČAJU	Lendava - Lendva	Pomurska	21.121	114	Manufacture of other organic basic chemicals
* TANIN SEVNICA d.d.	Sevnica	Posavska	19.361	117	Manufacture of other chemical products n.e.c.
* MITOL d.o.o., Sežana	Sežana	Obalno-kraška	18.354	81	Manufacture of glues
Olma d.o.o.	Ljubljana	Osrednjeslovenska	18.302	32	Manufacture of other chemical products n.e.c.
DONIT TESNIT, d.o.o.	Medvode	Osrednjeslovenska	17.816	188	Manufacture of other chemical products n.e.c.
EXOTERM-IT d.o.o., Kranj	Kranj	Gorenjska	17.155	40	Manufacture of other chemical products n.e.c.
BELINKA PERKEMIJA, d.o.o.	Ljubljana	Osrednjeslovenska	16.780	59	Manufacture of other inorganic basic chemicals
KOZMETIKA AFRODITA d.o.o. Rogaška Slatina	Rogaška Slatina	Savinjska	15.701	137	Manufacture of perfumes and toilet preparations
VITIVA d.d.	Markovci	Podravska	15.189	81	Manufacture of other chemical products n.e.c.

Note: Asterisk * denotes companies in chemical sector that deploy substantial part of bio-based activities.

5.2 PHARMACEUTICAL INDUSTRY

Table 5.2 Main actors in the pharmaceutical sector according to the data provided by AJPES for the business year 2018

Company	Town	Region	Turnover (mio €)	Employees	Sector
KRKA, d.d., Novo mesto	Novo mesto	Jugovzhodna	1,231.784	5002	Manufacture of pharmaceutical preparations
*Lek d.d.	Ljubljana	Osrednjeslovenska	1,061.302	3793	(Manufacture of pharmaceutical preparations
SENSILAB d.o.o.	Ljubljana	Osrednjeslovenska	25.985	140	Manufacture of pharmaceutical preparations
MARIFARM d.o.o.	Maribor	Podravska	1.389	95	Manufacture of pharmaceutical preparations

Note: Asterisk * denotes companies in pharmaceutical sector that deploy substantial share of bio-based activities.

5.3 TEXTILES

Table 5.3: Main actors in "Textile" sector according to the data provided by AJPES for the business year 2018

Company	Town	Region	Turnover (mio €)	Employees	Sector
BOXMARK LEATHER d.o.o.	Kidričevo	Podravska	151.915	1552	Manufacture of luggage, handbags and the like, saddlery and harness
FILC d.o.o.	Škofja Loka	Gorenjska	85.317	341	Manufacture of non-wovens and articles made from non-wovens, except apparel
ALPINA, d.o.o.	Žiri	Gorenjska	50.088	327	Manufacture of footwear
DANI AFC d.o.o.	Slovenj Gradec	Koroška	46.942	358	Tanning and dressing of leather, dressing and dyeing of fur
INTERSOCKS d.o.o., Kočevje	Kočevje	Osrednje-slovenska	38.562	115	Manufacture of knitted and crocheted hosiery
PREDILNICA LITJA d.o.o.	Litija	Zasavska	32.317	237	Preparation and spinning of textile fibers
PLANIKA TURNIŠČE d.o.o.	Turnišče	Pomurska	30.268	225	Manufacture of footwear

KONUS KONEX d.o.o.	Slovenske Konjice	Savinjska	27.839	157	Manufacture of non-wovens and articles made from non-wovens, except apparel
TREVES d.o.o.	Trebnje	Dolenjska	23.324	141	Manufacture of carpets and rugs
LISCA d.d. Sevnica	Sevnica	Posavska	22.648	247	Manufacture of underwear

5.4 PULP AND PAPER INDUSTRY

Table 5.4 Main actors in "Pulp and paper" sector according to the data provided by AJ PES for the business year 2018

Company	Town	Region	Turnover (mio €)	Employees	Sector
Količevo Karton, Proizvodnja kartona, d.o.o.	Domžale	Osrednje-slovenska	166.566	389	Manufacture of paper and paperboard
Papirnica Vevče d.o.o.	Ljubljana - Dobrunje	Osrednje-slovenska	108.029	143	Manufacture of paper and paperboard
VIPAP VIDEM KRŠKO d.d.	Krško	Posavska	96.877	338	Manufacture of paper and paperboard
Paloma, higienski papirji, d.d.	Sladki Vrh	Podravska	81.964	549	Manufacture of household, sanitary and toilet articles of paper
Goričane, tovarna papirja Medvode, d.d.	Medvode	Osrednje-slovenska	73.536	212	Manufacture of paper and paperboard
DS SMITH SLOVENIJA d.o.o.	Krško	Posavska	69.764	192	Manufacture of corrugated paper and paperboard and of containers of paper and paperboard
PAPIRNICA VEVČE PROIZVODNJA d.o.o.	Ljubljana	Osrednje-slovenska	49.036	420	Manufacture of paper and paperboard
TOSAMA d.o.o.	Domžale	Osrednje-slovenska	37.903	214	Manufacture of household and sanitary goods and of toilet requisites
RADEČE PAPIR NOVA, d.o.o.	Radeče	Posavska	28.861	419	Manufacture of paper and paperboard

5.5 ENERGY

RCERO Ljubljana is the most modern plant in Europe for the treatment of biological waste. Each year, the facilities produce 60,000 tonnes of solid fuel, 35,000 tonnes of digestate (material remaining following the breakdown of mixed municipal waste), 7,000 tonnes of compost and 25,000 tonnes of waste that can be recycled to generate raw materials. It also generates 17,000 megawatt hours (MWh) of renewable electrical energy and 36,000 MWh of heat energy from biogas ⁴.

Koto d.o.o. is another company oriented into production of green energy. Their biogas plant has a production of 1.8 million m³ of biogas per year. It produces 4,000 MWh of electrical energy annually ⁵.

Panvita Ekoteh d.o.o. manages three biogas plants, Nemščak, Motvarjevci, and Jezera. Furthermore, it takes care of the environmental processes in the Panvita Group. The electricity produced is sold on the market, and the thermal energy is used to heat farms in Nemščak and Motvarjevci and for the heating of the Jezero settlement and Murska Sobota General Hospital. In 2018, they produced 27,091.6 MWh of electricity which was sold on the market, and 5839.6 MWh of thermal energy ⁶.

5.6 CLUSTERS AND ORGANISATIONS

Most relevant clusters and organizations in chemical and pharmaceutical industry:

- **Association of Chemical Industries of Slovenia**⁷

Most relevant clusters and organizations in textile sector:

- **Textiles, Clothing and Leather Processing Association**⁸

Most relevant clusters and organizations in pulp and paper sector:

- **Association of Paper and Paper Converting Industry**⁹

Most relevant clusters and organizations in energy sector:

- **Energy Industry Chamber of Slovenia**¹⁰
- **Slovenian Energy Association**¹¹

6 ACTORS IN KNOWLEDGE AND INNOVATION

6.1 CAMPUS, INCUBATORS AND TECHNOLOGY PARKS & HUBS

Technology park Ljubljana is the largest innovative ecosystem for commercialization of knowledge and technology in SE Europe. It spans over the 75.000 m² of high quality infrastructure and hosts over 300 member companies with more than 1.500 employees ¹².

6.2 RESEARCH AND INNOVATION ORGANISATIONS

At **University of Ljubljana**, there is a number of engineering (e.g. pharmaceuticals, chemical engineering, mechanical electrical engineering) and applied life science studies (e.g. wood processing, food technology, biotechnology) that provide a solid knowledge basis for bio-based R&I and industries. The most visible faculties in that sense are Faculty for Chemistry and Chemical Technology in Ljubljana, Biotechnical Faculty, Faculty of Mechanical Engineering etc.

Also Faculty of Chemistry and Chemical Technology of **University of Maribor** is actively engaged in R&I in bio-based sector¹³.

Pulp and Paper Institute, with its Laboratory and the Pilot equipment represents the only papermaking infrastructure centre in the area of SE Europe. Laboratory equipment enables the study and characterization of input materials, the characterization of paper and paper products, waste water, solid waste and the evaluation of the production process.¹⁴

National Institute of Chemistry primarily relates to the production of various bio-based chemicals/materials. Research is oriented towards the development of new technologies and products, which will help to ensure the long-term development of Slovenia and which are internationally relevant. Industry is an important partner to the Institute in these endeavours¹⁵.

Scientists at **The Jožef Stefan Institute** also conduct, among other, some research work oriented into applications in field of bio-based products¹⁶.

The **InnoRenew CoE** is an independent research institute, formally established in the year 2017 in the frameworks of the project InnoRenew CoE. Focus of the InnoRenew CoE is to conduct research about renewable materials and sustainable buildings, and transfer scientific knowledge into industrial practice. Research activities are orientated to innovative and interdisciplinary approaches of wood and its use¹⁷.

7 GOVERNMENT AND SEMI- GOVERNMENT ORGANISATIONS AND NGOs

Most relevant **government organizations** for fostering and development of bioeconomy in Slovenia:

- **Strategic Research and Innovation Partnership (SRIP) – Networks for the transition into circular economy¹⁸**
- **Ministry of Agriculture, Forestry and Food¹⁹**
- **Ministry of the Environment and Spatial Planning²⁰**
- **Ministry of Economic Development and Technologies²¹**

Most relevant **non-governmental organizations** supporting growth of bio-based industry sector:

- **Chamber of Commerce and Industry of Slovenia (CCIS)²²**
- **Chamber of Craft and Small Business of Slovenia (OZS)²³**

8 MARKET ACTORS: BRAND OWNERS AND CONSUMER GROUPS

Table 8.1: Largest brand owners in field of bioeconomy in Slovenia

Company	Town	Region	Turnover (mio €)	Employees	Sector
LJUBLJANSKE MLEKARNE	Ljubljana	Osrednje-slovenska	168.609	606	Operations of dairies and cheese making
PERUTNINA PTUJ	Ptuj	Podravska	164.833	1401	Processing and preserving of poultry meat
PIVOVARNA LAŠKO UNION D.O.O.	Ljubljana	Osrednje-slovenska	153.080	592	Manufacture of beer
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KRAS D.D.	Sežana	Obalno-kraška	39.932	171	Processing and preserving of meat
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ETA KAMINK D.O.O.	Kamink	Osrednje-slovenska	20.332	136	Oth proc., preserv. of fruit, vegetables

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