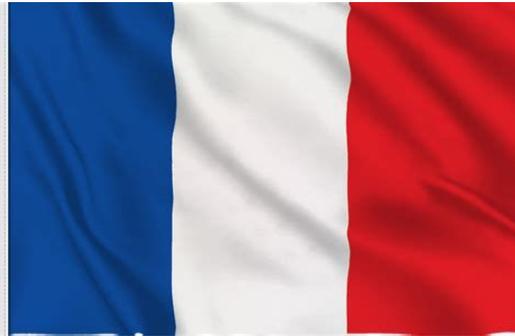


Agrofood Newsletter:

1st December 2020

FRANCE



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THE FRENCH AGRI-FOOD SECTOR

First employer in the manufacturing industry, with more than 18,000 companies and 380,000 employees, first industry in terms of turnover, the agri-food industry is a major player in French economy and a vector of competitiveness and attractiveness at national, European and international levels. It is also a sector of extraordinary diversity, whose world wide fame relies not only on major groups and well-known brands, but also on many SME/VSE that boost our territories by their innovation capacity and the quality of their products.

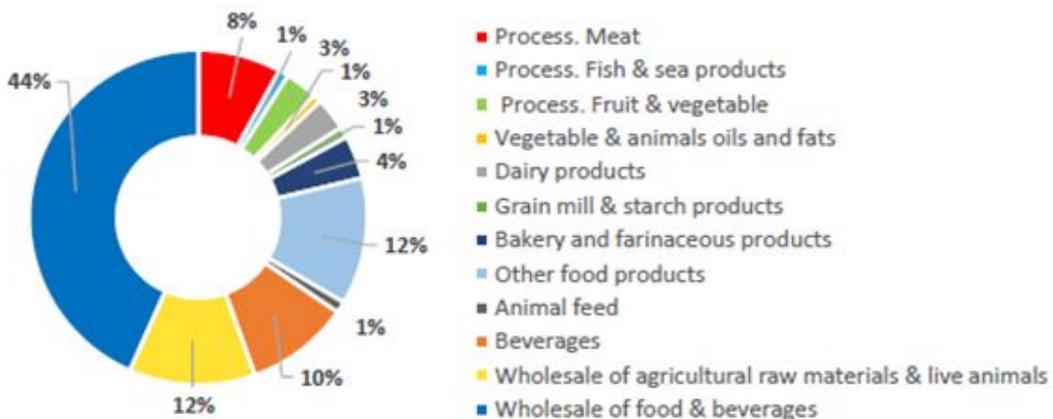
KEY FIGURES OF THE FRENCH AGRI-FOOD SECTOR

Sources : Insee - Esane, treatment SSP ; Insee, survey Entreprises et développement durable, 2016 ; Ministry of Agriculture and Food



THE DIVERSITY OF FRENCH AGRI-FOOD COMPANIES

Source : Insee - ESANE 2015 - treatment SSP
By sector of activity



Source of the document: French Agri-food industries - 2018 - Ministère de l'Agriculture et de l'Alimentation

A FLAGSHIP SECTOR OF THE FRENCH INDUSTRY

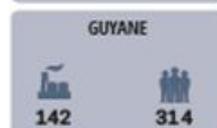


Source of the document: *French Agri-food industries - 2018 - Ministère de l'Agriculture et de l'Alimentation*

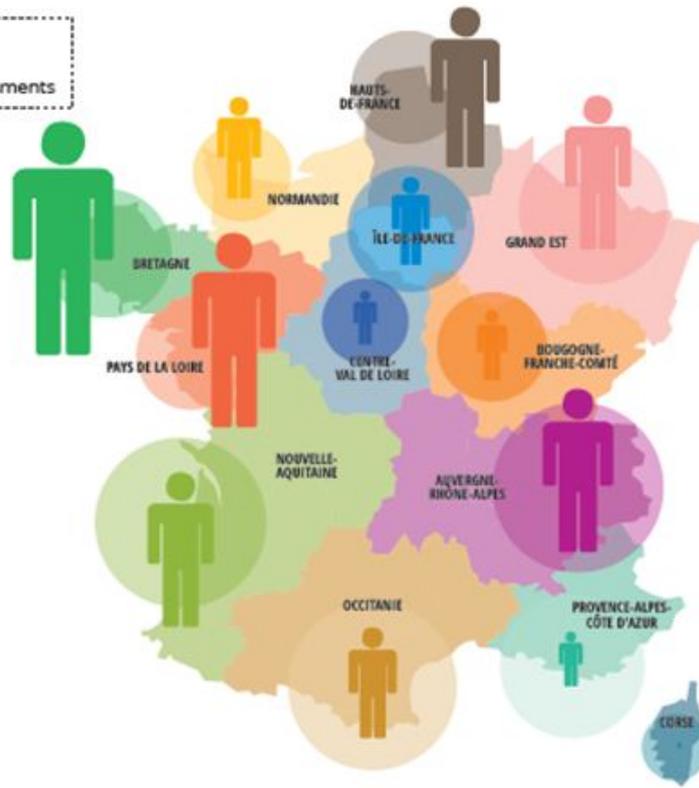
THE FRENCH AGRI-FOOD INDUSTRY : A DYNAMISM SPREAD THROUGH THE WHOLE COUNTRY

Source : Insee, Clap 2015.

 Employee numbers
 number of establishments



Champ : IAA, France.



Source of the document: French Agri-food industries - 2018 - Ministère de l'Agriculture et de l'Alimentation

FOCUS ON FRENCH REGIONS

BRETAGNE - BRITTANY



Located in the extreme west of France, Brittany is the largest French peninsula. It is around 34,030 km² (13,140 sq mi) and stretches toward the northwest and the Atlantic Ocean. It is bordered to the north by the English Channel, to the south by the Bay of Biscay and the waters located between the western coast and Ushant Island from the Iroise Sea.

Fishing and agriculture remain important activities in Brittany. Brittany has more than 30,000 agricultural exploitations, mostly oriented towards cattle, pig and poultry breeding, as well as cereal and vegetable production. The number of exploitations tends to diminish, but as a result, they are merged into very large estates. Cereals are

mostly grown for cattle feeding. Brittany is the first region in France for fishing. The activity employs around 9,000 people, and more than 60 firms work in fish and seafood processing. Food processing (meat, vegetables...) represents a third of the industrial jobs.

THE AGROFOOD SECTOR AT A GLANCE: KEY FIGURES

Brittany is the **1st agricultural French region** in:

- **vegetal productions** (% of national tonnage)
cauliflowers 80% – shallots 78% – artichokes 71% – spinach 45% – tomatoes 27%

- **animal productions** (% of national livestock)
porks / pigs 58% – egg poultry 42% and 29% bio – meat poultry 32% – dairy cow 21%

- **agrofood industry**
12% of employees from France in agrofood industry
1st region for slaughter: porks 59% – calves 36% – meat poultry 32%

In Brittany there are few Appellations d'Origine (AOC/AOP), only 8 but some of them are quite famous, such as:

- the "**Coco de Paimpol**", a white bean only cultivated in the department of Côtes d'Armor and hand harvested
- the "**Oignon de Roscoff**", a pink color onion, cultivated for over 300 years and with some history facts with Great Britain
- the **cider** and the AOP "Cornouaille". Take a break and explore the Cornouaille [cider route](#) and read the offer of one of its manufacturers in the POD : [French producer of craft ciders is looking for distributors abroad](#).

NOUVELLE-AQUITAINE - NEW AQUITAINE



Located in the South West of France, the New Aquitaine region is the result of the merger of three former regions (Aquitaine, Limousin, Poitou-Charentes), gathers 5,956,978 millions inhabitants disseminated in 12 departments. With 84,036 square kilometres, the Nouvelle-Aquitaine region **is the largest region in France**. Bordeaux is the largest town, followed by Limoges (famous for its porcelain). The gross domestic product (GDP) of the region was 177.0 billion euros in 2018, accounting for 7.5% of French economic output. **The agrofood sector is a key one ranking third in France behind the Ile de France and Brittany regions**, famous for many strong identities, symbolized through 218 SIQO.

New Aquitaine's agri-food sector is a major exporter, accounting for one-third of the region's total exports. With a trade surplus of €3.7 billion, it contributes positively to the trade balance in foreign trade and remains **the largest contributor in terms of export value, ahead of aeronautics**. New Aquitaine is the leading region producing appellation wines (Bordeaux, Bergerac, Monbazillac, Tursan, Duras, Irouléguay...) and brandy (Cognac, Armagnac).

New Aquitaine has become Europe's leading agrofood region by value.

THE AGROFOOD KEY SECTORS:

- 1st agricultural region in France and in Europe :
 - animal sector – meat and milk, preparation of meat; and national leader in the production of goose and duck (nearly 50% of the French production)
 - processing of fruits and vegetables; national leader in the production of carrots, green beans and especially sweet corn, plums, strawberries, kiwi, hazelnuts, melons, and the second for nuts and asparagus.
- 2nd organic region in France
- 2nd vineyard region in France
- 2nd largest fish industry region in France with oyster producing and salt sites. The French caviar production is mainly carried out by companies located in the ancestral stronghold of sturgeon, near the Gironde and Dordogne estuaries.

The region's new organization opens up a multitude of opportunities for synergy between its companies. The presence of training establishments in agrofood professions is an additional asset. ([Limoges les Vaseix](#), [Sicaudières campus](#), [Bordeaux Sciences Agro](#), [ENILIA Surgères](#), [University of La Rochelle](#), etc.) The existence of many technical centres such as [CRITT](#), [ITERG](#), [AGROTEC](#), [ACTALIA](#), [BNIC](#), [IFV](#)... organised in a network, a competitiveness cluster like [AgriSud-Ouest Innovation](#) and clusters ([Inno'vin](#) and [Fruits et Légumes](#)), creates a dynamic of collaborative work in the region, in partnership with research laboratories, support for companies in innovation and skills development, to optimise the industrial agri-food potential of New Aquitaine. Discover the New Aquitaine with this short film: <https://youtu.be/nz0gnz2QEC8>

OCCITANIE - OCCITANIA



Located in the South of France, Occitanie resulted from the merger of two former regions: Midi-Pyrénées and Languedoc-Roussillon. Toulouse is the region's capital and Montpellier its second biggest city. Occitanie has a coastline on the Mediterranean Sea and shares a border with Spain. In 2018, the region had a population of about 5.86m, i.e. 8.8% of the French population. The regional area is 72,724 km² and population density is 80.6 inhabitants per km² (Eurostat 2019).

The region's economy is characterised by a very high number of SMEs, and in particular very small businesses: 97% of companies have less than 10 employees (Eurostat, 2019). Occitanie is, nevertheless, one of the leading

regions in France in the field of research and innovation.

The key sectors and main areas of innovation are: aeronautics and space around the city of Toulouse, ICT, health, **the food industry (including wine production) and agronomy.**

THE AGROFOOD SECTOR AT A GLANCE: KEY FIGURES

Agri-food, agriculture and viticulture take up half the regional territory and generate a turnover of €13.7 p.a (i.e. 9% of the Regional Domestic Product)

- 1st organic region in France in terms of farms
- 1st agricultural region in France in terms of surface area
- 1st global vineyard for certified wines of origin in terms of surface area
- 3rd agricultural region in France with 7,000 farms and 19% of the region's industrial jobs
- 3rd French region for foreign investment in 2019 with 138 set-ups 7% of which in agri-food
- 1st European region for the number of products under label of quality and origin (250 references), 60% of local companies use official labels of quality

The following main agricultural activities are supplied locally: Viticulture, fruits and vegetables, cereals, meat, dairy products, fish processing.

Occitanie offers **a well-structured and dynamic ecosystem in terms of innovation, R&D and training.** [Agropolis International](#), a leading international research complexe, and the [Cirad](#), the French agricultural research and international cooperation organisation working for the sustainable development of tropical and Mediterranean regions, are both headquartered in Montpellier. Occitanie is also **home to two competitiveness & innovation clusters**, i.e. [Agri Sud-Ouest Innovation](#) and [Innov'Alliance](#), and hosts a dense network of higher education establishments and research institutes on food and agronomy. As a result, the region boasts a qualified and available workforce and over 9,000 students 25% of whom are foreign.

Furthermore, within the **French tech Montpellier initiative**, the **“AgTech” thematic network specialises in the digitalisation of agriculture** and supports start-ups in their national and international development creating numerous cooperation opportunities in the field of ICT applied to agriculture, crop protection, environmental conservation, yield management etc.

AUVERGNE-RHÔNE-ALPES - AUVERGNE RHONE ALPS



Located in the centre and southeast of France, the region covers 69 711 km² and is home to 8m of inhabitants, which account for 12% of the French population, living in over 4 095 municipalities and 12 departments in 2018. Auvergne-Rhône-Alpes is the second most populated French region. The population density is 115 inhabitants per km². The regional capital is Lyon. The region borders Switzerland and Italy and five French regions: Bourgogne-Franche-Comté, Occitanie, Centre-Val-de-Loire, Nouvelle Aquitaine and Provence-Alpes-Côte d'Azur. Thanks to its industry and research stakeholders, Auvergne-Rhône-Alpes region is one of the most dynamic and innovative regions in France, ranking just after the Paris Ile de France region on many innovation indicators.

The agricultural sector accounted for 2.7% of the regional employment in 2018, which is slightly above than the average rate for France (2.5%) (Eurostat, 2019).

Although, the region, like all French regions has an economy dominated by SMEs, 4.1% of enterprises have more than 10 employees, which is more than the French average of 3.75%. On the other hand, companies with less than 9 employees in the region represented 95.9% of the total number of companies, slightly lower than the national level (96.2%) (Eurostat, 2019).

THE AGROFOOD SECTOR:

Main agricultural production Auvergne-Rhône-Alpes holds 67 Appellations d'Origine (AOC/AOP). The region notably distinguishes itself by its production of quality wines, its livestock, the richness of its orchards, its cereals production and specialty cheeses. Furthermore, Auvergne-Rhône-Alpes have the second largest utilised area for organic farming in France (certified area).

The latter is varied: Ain, the Alps and the Rhone raise 1.2 million cattle (ranked 7th nationally) and produce 15.5 million hectoliters of milk (ranked 5th nationally)

OC vineyard covers 42 454 ha and produces 2 347 hl per year, or 10% of national production

FRENCH SPECIALITIES AT A GLANCE



You can search [this database](#) (in French) for detailed information about French products that benefit from quality labels including (but not limited to) PDOs, PGIs and GIs.

The European equivalent is available here: <https://www.tmdn.org/giview/gi/search>

The French SG members:

- Auvergne-Rhone Alps: Ghislaine Da Cruz - g.dacruz@drome.cci.fr
- Brittany: Maryline Danielou - Maryline.Danielou@bretagne.cci.fr
- New Aquitaine - Valérie Mandon - valerie.mandon@limoges.cci.fr
- Occitania: Dimitrios Diles - d.diles@occitanie.cci.fr

COOPERATION OPPORTUNITIES

Support to foreign companies looking to invest or set up an establishment in France

Based in Lattes, close to Montpellier, Geolink Expansion is a team of **business facilitators offering free services** to foreign companies that are interested in **setting up a business anywhere in France**.



Whether the project requires looking for a new site, a processing workshop, a clean room or an agri-food building, Geolink Expansion's advisors can support foreign companies every step of the way.

The team is in direct contact with local authorities, business park managers and private real estate agents. They have a **strong network in the food sector, including industrial partners, raw**

material suppliers and competitiveness clusters. They respond quickly and free of charge to real estate enquiries.

Geolink Expansion was **founded in 2015** and has since facilitated more than 1,500 foreign companies' expansion plans, including **nearly 200 in the agri-food sector.**

Contact: Mr Anton Fretzel (Tel: +33 434 221 487 | +33 671 850 321, a.frenzel@geolink-expansion.com)

Additional information is available on the web sites below:

www.invest-hub.org, www.geolink-expansion.com

Want to find out more or get in touch?

Contact Dimitris Diles (d.diles@occitanie.cci.fr , +33 4 67136849)

A specific internet platform devoted to 'eco-entrepreneurs'



The Chambers of commerce and industry of the New Aquitaine developed a **specific internet platform devoted to 'eco-entrepreneurs': a directory of more than 700 structures and SME's divided into 6 categories:** eco-products and eco-services, acoustics, air vibration and odour, waste recycling, water, energy

management and renewable energy, environmental management, urban planning, landscape risks and sustainable development: <https://www.eco-entrepreneurs.org/>

BUSINESS OFFERS

Organic maple syrup as a raw material and maple syrup products

French company located in Saint-Pierre la Mer, Southern France, offers **organic maple syrup** and maple syrup products such as **maple butter, maple jelly, maple sugar**.

The company has its own production that takes place in Quebec, in the purest local tradition and under Ecocert Canada certification. Without brokers, the products are imported under Ecocert France certification, directly to the French company's warehouse that is also registered on the TRACE system of the UE and France BIO. All products are 100% natural and without additives. The products are available all year round.

The company is looking for **distributors** with the right connections in the food industry clientele: Fine food shops, BIO counters, Michelin-starred chefs, pastries, organic markets, Vegans & Vegetarians, epicureans, type 2 diabetics, restaurants specialized in pancakes, crepes, waffles and catering, etc.

They are also interested in **food processing companies looking to develop new sweet or salty recipes with raw maple syrup or maple syrup products as ingredients**.



For Eols, please get in touch with Dimitris Diles (d.diles@occitanie.cci.fr , +33 4 67136849)

French company producing black garlic is looking for distributors in Italy, Switzerland and Belgium specialized in HORECA sector.

This company is located in the South of the Auvergne Rhône-Alpes area, it has experience in the production of garlic. Since 2017, the company has developed a **production method of black garlic products**.

The French company has developed its presence on the French market from local supplier to national supplier of French Chefs. The company seeks increased sales for its present products through promotion and distribution in Italy, Switzerland and Belgium. The products are presented on the domestic market.

The company is looking for **distributors which are engaged in selling soft drinks to bars, restaurants or hotels in order to distribute the black garlic products in Italy, Switzerland and Belgium**.

For Eols, please get in touch with Ghislaine DA CRUZ (g.dacruz@drome.cci.fr).

French manufacturer of acoustic bird repellents is looking for distributors abroad

This French company, founded in 2015 and located in west of Brittany, develops and markets **pest control products**. Its innovative products are used to **protect cereal crops and livestock farms**.

Currently, the SME offers several repellent devices which protect **up to 2, 3 and 4 hectares**. These devices prevent bird damage to crops and their repelling effect is **efficient on several species**: crows, pigeons, starlings, seagulls, etc.

The company is looking for distributors/resellers of agricultural and farm equipment already well rooted on their home market. **Their role will be to promote and sell the acoustic bird repeller** range to the farmers and manufacturers in their own country.



For Eols, please [check the offer BOFR20200608001](#) and get in touch with Maryline Danielou (maryline.danielou@bretagne.cci.fr)

COMPANY MISSIONS

Organics days - Company mission during the Bio N Days Fair 9 – 10 June 2021

Bio N Days Fair is the 6th International Business Convention for Organic Products, it spans the food industry, cosmetics, textiles and household cleaning products from France and abroad. The event is focused on technology and marketing innovation.

The international meeting place for anticipating, innovating and discussing the organic products of the future.

The B2B meetings are an opportunity to meet companies face to face, as well as distributors, suppliers, experts and financiers. Build your network, make new contacts and meet potential technical and business partners.

Themed workshops to gain new skills and practical tools. Take part in panel discussions to discuss possible avenues for your future projects.

Conferences with international experts. Find out about current and emerging trends and the consumer behaviour patterns.

The Tasting & Testing Tour where you can be the first to try out new product innovations and meet the people behind the ideas.

Professionals in the field sharing first-hand experience of their winning strategies. Showcase your range and boost your brand profile amongst a wealth of processors and distributors ...

A friendly get-together evening for you to build your network

The target audience:

Representatives from different sector like Food industry, cosmetics, textiles, household cleaning products

500 companies, research organisations and clusters from over 12 countries participated in this Brokerage Event in 2018 and booked more than 250 bilateral meetings.

RECIPE: "BÛCHE DE NOËL"

The Holidays are close and the French will definitely tell you Christmas would not be the same without the "bûche de Noël", so here's the recipe. Enjoy!

Ingredients (12 servings)

2 cups heavy cream

½ cup confectioners' sugar

½ cup unsweetened cocoa powder

1 teaspoon vanilla extract

6 egg yolks

½ cup white sugar

⅓ cup unsweetened cocoa powder

1 ½ teaspoons vanilla extract

⅛ teaspoon salt

6 egg whites

¼ cup white sugar

confectioners' sugar for dusting



Preheat oven to 375 degrees F (190 degrees C). Line a 10x15 inch jellyroll pan with parchment paper. In a large bowl, whip cream, 1/2 cup confectioners' sugar, 1/2 cup cocoa, and 1 teaspoon vanilla until thick and stiff. Refrigerate.

In a large bowl, use an electric mixer to beat egg yolks with 1/2 cup sugar until thick and pale. Blend in 1/3 cup cocoa, 1 1/2 teaspoons vanilla, and salt. In large glass bowl, using clean beaters, whip egg whites to soft peaks. Gradually add 1/4 cup sugar and beat until whites form stiff peaks. Immediately fold the yolk mixture into the whites. Spread the batter evenly into the prepared pan.

Bake for 12 to 15 minutes in the preheated oven, or until the cake springs back when lightly touched. Dust a clean dishtowel with confectioners' sugar. Run a knife around the edge of the pan and turn the warm cake out onto the towel. Remove and discard parchment paper. Starting at the short edge of the cake, roll the cake up with the towel. Cool for 30 minutes.

Unroll the cake and spread the filling to within 1 inch of the edge. Roll the cake up with the filling inside. Place seam side down onto a serving plate and refrigerate until serving. Dust with confectioners' sugar before serving.