



FRENCH AGRI-FOOD INDUSTRIES

2018



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 global 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.

The French National Food Conference that took place in 2017 has put food at the heart of societal debates. This work of co-construction helped us to federate the ambitions of the different actors involved and to identify shared goals. The roadmap resulting from the French National Food Conference materialize a number of those ambitions:

- > setting up a new framework to restore producers' income and investment margins for industries;
- > development of sector plans to involve all stakeholders, from upstream to downstream, aiming at upgrading our food system;
- > the adoption of a Major Investment Plan with a 1.7 billion euros component dedicated to improving downstream competitiveness;
- > "Ambition Bio 2022", a plan to boost conversions to organic farming and organize the supply of organic products;
- > a bioeconomy strategy to promote all types of biomass and support the development of a biosourced industry that is effective, innovative and sustainable,
- > "Ecophyto2 +", a plan to reduce the use of crop protection products.

The law "for the balance of commercial relations in the agricultural and food sector and a healthy and sustainable food system" adopted in early October represents the legislative part of this roadmap. The objective is to revive value creation and to better distribute it within the sector, for the benefit of the weaker actors: the farmers but also the agri-food industries.

Farmers, industries, the retail sector, consumers, civil society, government, members of Parliament and other elected officials, but also citizens have drawn together the diagnosis and imagined the solutions.

The Ministry of Agriculture and Food will work alongside professionals in the agri-food industry, supporting the necessary transformations required to meet the challenges of climate change, respond to societal demands and open up new development opportunities.

France is rich of a diversity of products that reflects the diversity of its landscapes and its traditions, but also with thriving start-ups as well as a dynamic research and innovation system.

France welcomes all investors that are willing to develop this unique potential.

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

170
billion revenue

386 000
employees

1.7
billion euros of public funds
(« Major Investment Plan ») for the competitiveness of agri-food industries

98 %
of companies with less than 250 employees

19 % average investment rate

2nd agri-food industry in Europe

26 % average export rate

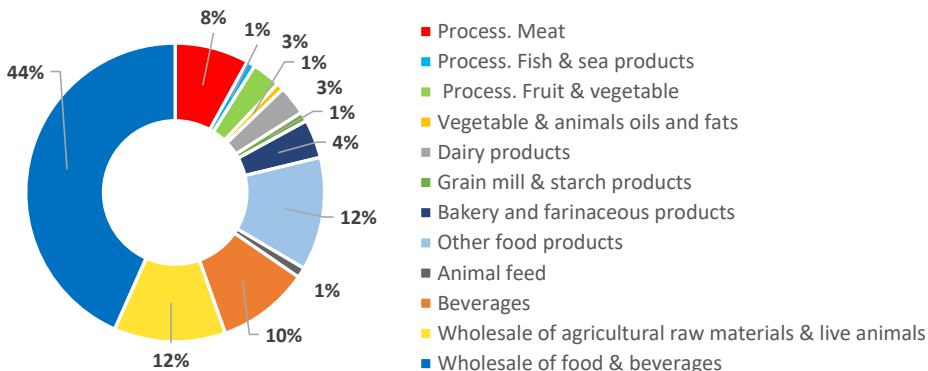
+ 1 000
products under quality and/or origin label

54 000
sanitary inspections per year

69 %
of companies are engaged in

THE DIVERSITY OF FRENCH AGRI-FOOD COMPANIES

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



A FLAGSHIP SECTOR OF THE FRENCH INDUSTRY

MINISTÈRE DE L'AGRICULTURE ET DE L'ALIMENTATION

FRANCE'S RANKINGS FOR AGRICULTURAL AND AGRIFOOD PRODUCTION

SOURCES : AGRESTE, EUROSTAT, FRANCEAGRIMER - DÉCEMBRE 2017



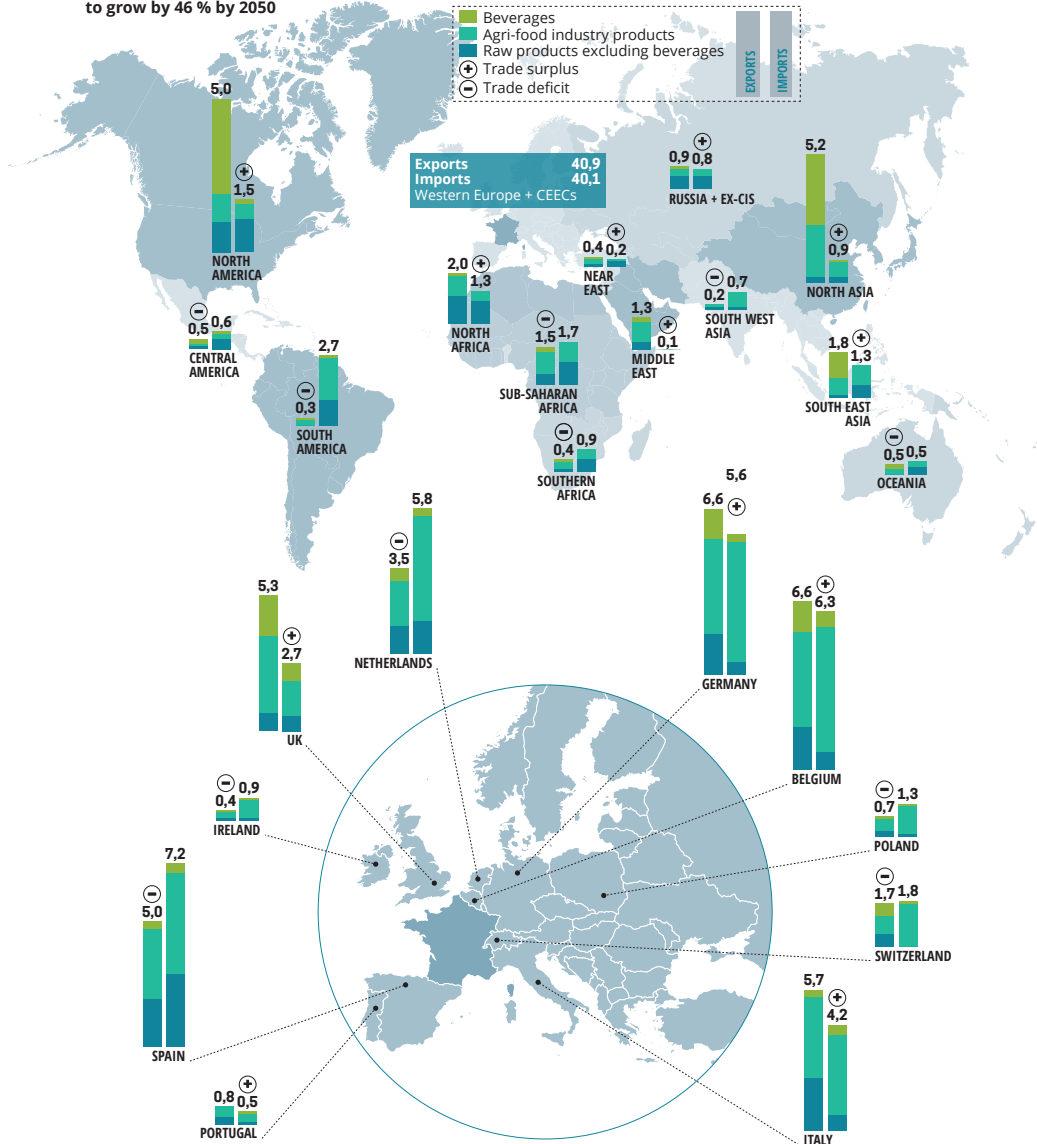
FEEDING A GROWING GLOBAL POPULATION

France's exchanges of agricultural and agri-food products around the world

Scope : Agricultural and agri-food products (excluding tobacco), 2017



Sources : Douanes, treatment SSP

Global food demand is expected to grow by 46% by 2050





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



Source : Insee, Clap 2015.

 Employee numbers
 number of establishments

BRETAGNE

 1 481  53 979



PAYS DE LA LOIRE

 1 076  44 863



AUVERGNE-RHÔNE-ALPES

 2 576  37 791



HAUTS-DE-FRANCE

 1 139  37 052



GRAND EST

 1 962  35 505

NOUVELLE-AQUITAINE

 2 576  35 712



PROVENCE-ALPES-CÔTE D'AZUR

 1 833  12 608


DÉPARTEMENTS D'OUTRE MER



OCCITANIE

 2 508  25 485



CENTRE-VAL-DE-LOIRE

 655  12 414



LA RÉUNION

 435  3 789



GUYANE

 142  314



NORMANDIE

 845  23 426



CORSE

 399  914


MARTINIQUE

 268  1 534


MAYOTTE

 NC  NC



BOURGOGNE-FRANCHE-COMTÉ

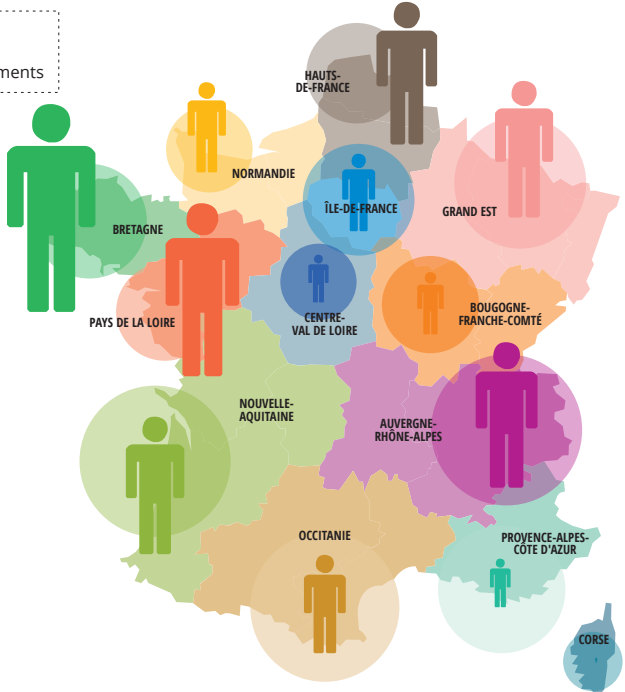
 1 066  16 152

ÎLE-DE-FRANCE

 1 408  20 159

GUADELOUPE

 518  1 467



Champ : IAA, France.

<http://agriculture.gouv.fr/le-panorama-des-industries-agroalimentaires>
<http://agriculture.gouv.fr/iaa-chiffres-et-indicateurs-cles>
<http://agriculture.gouv.fr/le-panorama-des-iaa-par-region>
<http://agriculture.gouv.fr/enjeux-des-industries-agroalimentaires>
<http://agriculture.gouv.fr/le-plan-strategique-export-2018-2022>
<http://agriculture.gouv.fr/guide-des-dispositifs-nationaux-de-soutien-linnovation>

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