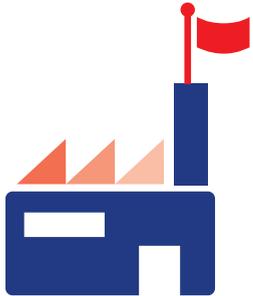




**THE WORLD'S
LEADING
EXPORTER OF WINE**

(GTA)

ACCESS TO A MARKET OF
67
MILLION CONSUMERS
AND A GATEWAY TO EMEA MARKETS
(INSEE)



**#1
HOST COUNTRY FOR
FOREIGN INVESTMENT
PROJECTS**

(EY)



**AGRI-FOOD:
#1
INDUSTRIAL SECTOR
IN FRANCE**

(INSEE)



KEY INFO IN
**10
POINTS**

**AGRI-FOOD:
A FLAGSHIP
INDUSTRY**

HIGH-TECH INDUSTRIES

APRIL 2019

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1 A KEY PLAYER

With revenues of €166 billion, of which 21% comes from exports, 17,253 companies and nearly 385,000 employees in 2016, the agri-food industry is the leading industrial sector in France. It accounts for 20% of total revenues from the French manufacturing industries (INSEE, Agreste) and is the second largest in Europe in terms of revenues after Germany. (Eurostat)

2 INTERNATIONAL AMBITIONS

In 2018, France was the world's fourth largest agri-food exporter (UN-Comtrade). Agri-food was the third largest contributor to France's trade balance, with a surplus of €6 billion. The top four exports were drinks (€16.3 billion), dairy products (€6.5 billion), meat and meat-based products (€4.5 billion), and grain processing products (€2.6 billion). (French Customs Authorities)

3 AN ATTRACTIVE MARKET

This attractive sector welcomed 131 foreign investment projects between 2017 and 2018, resulting in more than 3,600 jobs being created or maintained (Business France). Among the foreign companies that invested and strengthened their presence in France in 2018 were Lavazza, Mars, Refresco Gerber, Sakata Seed Corporation, and Nomad Foods.

4 EUROPE'S #1 PRODUCER OF AGRICULTURAL PRODUCTS

France is the leading European producer of agricultural products. It is ranked first for sugar, cereal, and meat production, with 5.8 million tonnes of pure sugar other than glucose and 53.6 million tonnes of cereals produced in 2016, and 1.44 million tonnes in carcass weight equivalent (CWE) of beef produced in 2017. (Eurostat)

5 INNOVATION HUB

France boasts a strong R&D ecosystem, and is home to INRA, IRSTEA, and The French Agricultural Research Centre for International Development (CIRAD), as well as 15 agro-industrial technical institutes, The French Agency for Food, Environmental and Occupational Health and Safety (ANSES), and 11 competitiveness clusters. What's more, sixty-nine percent of agri-food industries innovate, a figure which is nine points higher than the average for manufacturing industries. (INSEE, CIS survey)

6 GLOBAL BRANDS

France boasts major agri-food companies, including Danone, which saw revenues of €24.7 billion in 2017, Groupe Lactalis (€18.4 billion), and Pernod Ricard (€8.9 billion).

7 A MARKET WORTH OVER €8 BILLION

With 1.8 million hectares, representing 13% of the European Union's (EU) organic utilized agricultural area (UAA) in 2017, France has the EU's third largest area of agricultural land given over to organic produce. French organic farming stands out for the diversity of its output, with the market for organic food products worth more than €8 billion in 2017, up 17% from 2016, and French exports amounting to €707 million. (Eurostat; Agence Bio, 2018)

8 FRANCE: THE COUNTRY OF WINE

In 2018, France was the world's second largest wine producer after Italy, with 49.5 million hectoliters produced (European Commission). A third of all French wines are exported making France the world's leading wine exporter, with foreign sales in 2018 amounting to €9.4 billion. In 2018, French wines accounted for almost one-third of world wine exports by value (GTA; Agreste, 2019).

9 SMART FOOD TAKES OFF

Many innovative projects have already emerged under the "smart food choices" banner, focusing on new forms of food. Examples include the Algolife algae production and processing facility and the success of Novolyze, recognized for its innovation and expertise in the food safety market.

10 FARMING GOES DIGITAL

Created in 2016 to support the farms of tomorrow, the Digital Farming Association brings together innovative players from the agricultural industry. These include Weenat, supplier and manager of meteorological and agricultural information through connected sensors; Naïo, whose agricultural robots help farmers to weed, hoe and harvest in an environmentally friendly way; and Carbon Bee, which has developed a hyperspectral camera for agricultural drones.