

GENERAL INFORMATION

Occitanie /Pyrénées-Méditerranée is a gateway to and from Mediterranean markets 260 Million Consumers at 300 km

- ✓ 5th most populated region in France. 5,7 million inhabitants,
- ✓ 2nd largest region of mainland France
- ✓ 1st population growth in France: + 53,000 new residents every year
- ✓ 1st French region for its rate of business creation
- ✓ 2 capital cities: Toulouse and Montpellier, 4th and 8th population ranked

5th regional GDP

- ✓ € 150,397 billions
- ✓ 7,2 % of National GDP
- ✓ Highest average growth between 1990 and 2012: + 2,1 % /year

Agriculture

- ✓ Agriculture occupies half of the territory 9% of the mainland total
- ✓ Turnover 6.867 billion € 2.2% of regional GDP
- ✓ Leading vineyard in the world, 1st for original wines
- ✓ Leading region for field crops (durum wheat, corn, soya, seeds)
- ✓ Leading region for organic farming

3rd agro-business region

- ✓ 7,000 establishments, 8.6 billions € turnover
- ✓ 19% of industrial jobs in the region

Strong identity and sense of belonging to the land

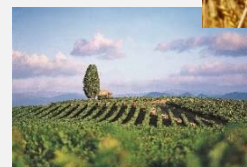
- ✓ 60% of the companies use official quality signs. example : 63% of wines are IGP (a quality category of French wine): 49 % are AOP (Appellation d'Origine protégée)
- ✓ Sud de France brand: an umbrella for quality food products and local wines

Major sectors

- ✓ 1st wine production region in the world
- ✓ Cereal derivatives, (bread, pastry)
- ✓ Fruit and vegetable (marmalade, juices)
- ✓ Milk processing, (Roquefort, ice creams)
- ✓ Meat processing (beef, poultry, lamb, sausage and ham...)

A dense network of educational institutions, research and innovation organizations

- ✓ Qualified available workforce, over 9,000 students in agriculture and Agronomy including 25% from abroad
- ✓ Efficient welcoming structures, incubators, technological platforms: Remote Sensing Centre, Ecotron, Genopole, experimental greenhouses, pilot halls



MAIN ACTORS

Main companies

3A coop, Agrial, Andros, Arterris, Bigard, Cemoi, Danone, Duc, Euralis Gastronomie, Gers Farine, Guasch, Haribo, Lactalis, Lallemand, Mars, Menguy's, Nestlé Waters, Nutrition et Santé (Hotsuka), Pernod Ricard, Poppies, Prolainat, Poult, Raynal et Roquelaure, Sodial, Vranken, Zuegg, etc.

R&D and innovation public actors

CGIAR, SUP Agro Montpellier, Toulouse Agri Campus, Veterinary school Toulouse

✓ 3 Innovation AG clusters

- Agri-Sud-Ouest Innovation; Cluster management Excellence
- Qualiméditerranée focusing for tomorrow's markets, including grapes, cereals, Mediterranean agronomy
- Terralia (Agribusiness cluster of the South-East)



KEY ASSETS

A dynamic and organized sector

- ✓ Linked with top innovation and public support
- ✓ Professional organisations (ARIA, Sud&Bio, Cooperatives)
- ✓ Support by the Region (economic development agencies, dedicated real estate and business parks)

Agropolis International

One of the main research centers in the world for agriculture, food, processes and nutrition-health: 2,300 research workers, engineers and teachers (including 400 positions in 60 countries) in 24 research institutions (INRA, CIRAD INSEEM, CNRS, CEA, CINES, IRD, IRSTEA, Universities, CHU, Engineering schools, etc.)



Biopôle Végétal

One of the 3 major research platforms with CORNELL University (New York/USA) and TSUKUBA (Japan). 300 researchers in vegetal genetics, genomics and biotech, resistance to pathogens, to stress, food quality preservation, etc.



Saint-Charles International Market

1st European fruit and vegetable deconsolidation centre

1,500,000 t. of fruit and vegetable sold, 92% of the national fruit and vegetable traffic.



Invest in the refrigerated fruit terminal in Sète

For sale, or private partnership to be proposed for this very modern facility (capacity 15,000 pallets) and well located between Saint-Charles Market (100km) and Cavaillon (100 km) and will be connected by rail to Paris by the end of the year. **An alternative to Northern Europe solutions.** The port has a Border Inspection point able to control all phyto and vegetables products as well as a cargo community system AP+ to speed up the formalities customs.

Good assets: no congestion, deep water port, swift phyto controls and social peace.



LATEST INVESTMENTS

CEMOI invested 72 million euros for its new chocolate production plant and dispatching at national and international level, a building 25,000 sq m, with a staff of 211 permanent contracts. The site is equipped with 11,000 sq m of photovoltaic panels producing 650,000 KWh.



CGIAR, (Consultative Group on International Agricultural Research) is hosted in Montpellier since 2010. CGIAR, sponsored by the UN FAO, the World Bank and the International Fund for Agricultural Development (FIDA), supports 15 agricultural research centres internationally to fight food vulnerability issues and reduce poverty by producing "global public property" in favour of developing countries.



LALLEMAND Inc. (Canada) – The Company located in Toulouse area develops steadily its activity of yeast, bacteria and specialty ingredients for bakery, created during the last 2 years over 35 positions.



NUTRITION & NATURE, Otsuka Holdings CO., Ltd (Japan)

Leader in health food, snacking and diet with over 650 job positions in the region., Extension in 2015 of production facilities (+10,000 sq m, +63 positions) and installation of new a gluten free production line.



SAKATA (Japan) Sakata Vegetable, leader for flower and vegetable seeds elected the region to settle its European decision center. The extension of production facilities and R&D transfer unit launched in 2016, represent 10M€ investment to be completed by 2020. Sakata employs over 160 persons in the region. Almost all the major international agri-suppliers, as well as seed production actors are established in the region.



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