

# Invest in Bretagne

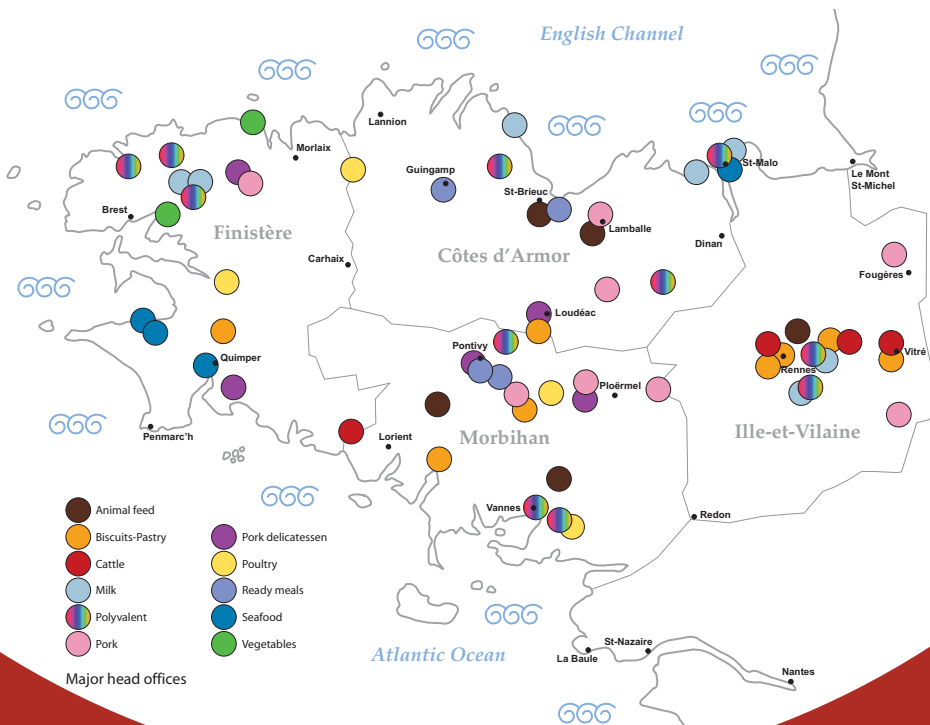
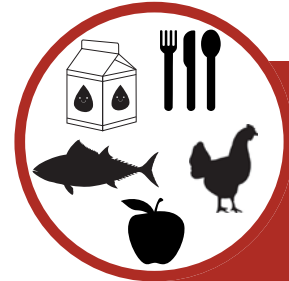
*Food safety & traceability*

*Quantity & diversity*

*Quality & authenticity*

*Innovation & research*

*Process & packaging*



## Bretagne facts & figures

- **Largest** agri-food region in Europe with **18 billion €** sales annually
- **Largest** agriculture region in France
- **3,950** companies and **130,000** employees in the agri-food & agriculture sectors
- Agri-food annual export sales amounting **3.2 billion €**
- **Largest** producer of organic vegetables in France

Bretagne,  
Land of excellence & innovation in Agri-food



## Clusters & professional associations

- Valorial (agri-food competitiveness cluster)
- Pôle Mer Bretagne (sea cluster)
- ABEA (Breton association of agri-food companies)
- Actilait (technical institute of French dairy)
- ADRIA (association for development, research and innovation in food processing industry)
- Breizpack (network of packaging industrialists)
- CBB Développement (ingredients, functional food)
- CEMAGREF (agricultural and environmental engineering research)
- CEVA (algae valorisation)
- CRISTAL (fresh and frozen technologies)
- ID.MER (technical institute for the development of sea products)
- Produit en Bretagne (promotional association dedicated to Breton know-how)
- Vegenov (vegetal biotechnology)
- Zoopole Développement (animal health, food, environment)

## Higher education & research centers

- ANSES (French agency for food, environmental and occupational health & safety)
- Agrocampus Ouest (national graduate school of agriculture and agro-industry)
- CERNh (education and research centre on nutrition)
- INRA (French research institute for agronomy)
- LCBM (molecular biology and chemistry laboratory)
- LEBHAM (ecophysiology, biotechnology applied to algae University of Brest)
- LUMAQ (applied microbiology laboratory of the Brest University)
- Rennes 1 University
- Southern Bretagne University
- STLO (milk and egg science and technology)
- Western Bretagne University, ESMISAB

## Events

- CFIA, the food industry suppliers trade show, March, Rennes
- SPACE, international trade fair for livestock, September, Rennes
- Empack Ouest, packaging, October, Vannes

# The Bretagne agri-food industry is focused on 10 key sectors

2007 figures, % of the French production, sources: IAA, INSEE

## 1. Meats: pork, beef, poultry

*Pork: 1,300,000 tons (58%) - Poultry: 585,000 tons (34%) - Veal: 46,500 tons (25%)*

**Companies:** Abera, Bigard, Cooperl Arc Atlantique, Doux, Europig, Even, Gad, Groupe Glon, Jean Floch, Kerméné, LDC, Savel, SVA Jean Rozé...

## 2. Sea food

*Fishing: sales = 347 million € (43%) - Fish industry: sales = 938 million € (34%)*

**Companies:** CEPL, Chancerelle, Cité Marine, Compagnie des Pêches de Saint Malo, Furic Marée, Groupe Adrien, Le Graet, Marine Harvest Kristen, Meralliance, MW Brands, Pan Fish, Paulet Petit Navire, Roullier, Saupiquet...

## 3. Delicatessen and convenience food

*Delicatessen: 381,000 tons (28%) - Convenience food: 20%*

**Companies:** Bonduelle Traiteur, Fleury Michon, Houdebine, LDC, Le Graet, Sill, Smithfield France, Stalaven, Tipiak, Traiteur de Paris...

## 4. Eggs and dairy products

*Eggs: 5 billion (42%) - Milk: 4.7 billion litres (20%) - Butter: 79,000 tons (23%) - Powder milk: 151,000 tons (33%)*

**Companies:** Bongrain, Entremont Alliance, Glon, Lactalis, Laïta, Laiterie de St-Malo, Novandie, Rolland Flipi, Sill, Triballat...

## 5. Vegetables

*Fruit & vegetable industry: 11% - Cauliflowers: 324,600 heads - Artichokes: 40,000 tons - Tomatoes: 178,000 tons*

**Companies:** Altho, Ardo, Cecab D'Aucy, Coopagri, Dujardin, Gelagri, Germicopa, Gest, Le Saint, Minerve, Prince de Bretagne, Savéol, Sill...

## 6. Biscuits and bakery

*Biscuits and pastries: 913,000 tonnes (20%)*

**Companies:** Biscuits Panier Tanguy, Brialys, Bridor, Delifrance, Delmotte, Goûters Magiques, La Trinitaine, Locmaria Les Gavottes, Norac, Panavi, Pâtisseries Gourmandes, Traou Mad...

## 7. Animal feed

*9.1 million tons (42%)*

**Companies:** AB Technologies, Cargill, Celtic (Provimi), Coopagri Bretagne, Cooperl, InVivo NSA, Inzo, Le Gouessant, Néolait (Provimi), Nestlé Purina Petcare, Nutréa, Olmix, Roullier, Sanders...

## 8. Ingredients

*Intermediate food products: leading French region*

**Companies:** Armor Proteines, Cargill Texturant Systems, Diana Ingredients, Epi Ingrédients, Lactalis, Mane Lyraz, Saveurs SA, Sill...

## 9. Process machinery

**Companies:** AM2C, Armor Inox, Couedic Madoré, GMMI, Kaufler, Krampouz, Lima, Marel, SMO International, Storck...

## 10. Packaging

*Sales: 1 billion €, 300 companies, 10,000 employees*

**Companies:** Bolloré, Breizpack, Formapack, Knauf, La Française des Plastiques, Multibox, Point Cardinal, Sacpo Sacherie...



## Food safety: a reference

IFS, BRC, ISO, Origin Labelled Products, Breton companies focus on the quality and safety of their products and process at each stage of the supply chain. Their know-how is highly valued all over the world.

### Food safety missions

Every year, Bretagne International organizes a food safety symposium in Asia. Recently, in Tokyo, 150 Japanese entrepreneurs and journalists came and listened to 8 major Breton agri-food industrialists explain how they deal with food safety.

## Organic food



- 1,057 organic certified farms (+9.1% vs previous year)
- 37% of the French organic laying hens
- 25% of the French agricultural area used for organic vegetables
- 20% of the French organic suckler cows and pigs
- Commercial development: 20% of products used in governmental mass catering must be organic by 2012 ("Grenelle environnement" national environmental plan).

## Private label goods: Bretagne is the largest European manufacturer

- Large diversity of products and high volume production
- Supply reliability and consistency
- Large quality range: from gourmet to low price products
- Focus on food safety
- Excellent transportation infrastructure
- Highly qualified workforce specialised in agrifood industry

Carrefour, Lidl, Intermarché, Leclerc... the Bretagne region is the largest food product supplier to major supermarket chains in Europe.

## Valorial: the agri-food competitiveness cluster for tomorrow's food

### Objective

Networking of companies, research bodies and training entities aiming at facilitating the development of innovative economic cooperation projects.

### Key areas

- adaptation of existing products to take account of changing distribution and consumption patterns
- development of new technologies for high added-value products
- research and creation of new products to meet changing market needs
- repositioning of agricultural production to meet the quality criteria of the agri-food sector

### Valorial facts and figures

- over 170 agri-food company members
- over 600 researchers
- over 30 projects approved every year

[www.pole-valorial.fr](http://www.pole-valorial.fr)



# Tax Credit for Research and Development

The Finance Law of 2011 updates the tax credit for R&D in France

Applications can be made simply by completing a straightforward form to be submitted at the same time as the corporate tax return.

## The amount of tax credit given to the company is equal to:

- 40% of R&D expenses the 1st year
- 35% of R&D expenses the 2nd year
- 30% of R&D expenses the 3rd year and for all of the following years
- These rates apply to the first 100 M€ of R&D expenses, over and above this amount the tax credit is equal to 5%

## The R&D expenses

All R&D expenses are taken into account:

- Staff costs (gross wages and social contributions) for researchers, engineers and technicians working directly on research
- Patent filing and maintenance costs
- Amortization of patents acquired for research purposes
- 50% of standardization costs
- Spending on patent defence and technology watch done within the European Union.

# Bretagne International

Bretagne International is a non-profit association of private companies located in Western France. We have been commissioned by the Regional Government of Bretagne to assist Breton companies in their international development, to identify and support foreign companies planning to expand their business into Europe/France through presence in Bretagne.

We provide free confidential assistance through the different stages of your project to expand your business.

## Data collection

- Market validation
- Supplier, partner and customer identification
- Availability and skills of workforce
- Financial incentives
- Cost assessments (salaries, taxes...)
- Labour laws

## Business meetings

Based on your requirements and your project, we tap into our long experience with Breton companies, our excellent knowledge of the regional know-how and the region's economic environment. We will work with you to set up a series of meetings with key business leaders in the region.

## Site proposals

With the support of **Bretagne Développement Innovation**, we can submit to you a selection of sites according to your needs (greenfield, industrial buildings, offices...).

## Assistance before, during and after your installation

We help you with all your administrative formalities:

- Law firm, accounting firm, bank and insurance recommendations
- Capital raising orientation
- Creation of your local structure
- Staff recruitment
- Arrival of your expatriates and their families...

## Meet us at:

- **ISM**, January, Cologne, Germany
- **Biofach - Vivaness**, February, Nuremberg, Germany
- **Gulfood - Ingredients Middle East**, February, Dubai, UAE
- **IFE Food & Drink**, March, London, the United Kingdom
- **Agrame**, March, Dubai, UAE
- **Food & Hotel**, April, Gyeonggi-do, South Korea
- **European Seafood Exposition**, May, Brussels, Belgium
- **Vitafoods**, May, Geneva, Switzerland
- **Hofex - Food & Drinks**, May, Hong-Kong
- **Interpack**, May, Dusseldorf, Germany
- **PLMA**, May, Amsterdam, the Netherlands
- **Food Taipei**, June, Taipei, Taiwan
- **Fancy Food Show**, June, Washington DC, USA

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