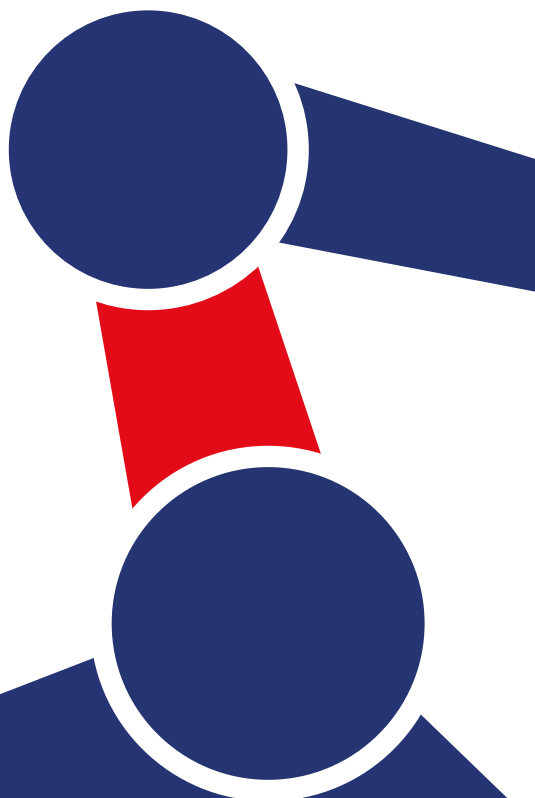


AGRI-FOOD: A FLAGSHIP INDUSTRY



1

A KEY PLAYER

With revenues excluding tax of €213 billion, 15,040 companies and 461,544 FTE employees in 2018, the agri-food industry is France's leading industrial sector (INSEE). It represents 17% of revenues for French industrial manufacturers and it is second in Europe in terms of revenues after Germany. (Eurostat)

2

INTERNATIONAL AMBITIONS

In 2019, France was the world's sixth largest exporter of agri-food products (UN Comtrade). The agri-food industry was the third largest contributor to the French trade balance in 2019, with a surplus of €7.9 billion. The top four exported products were drinks (€16.7 billion), dairy products (€7.6 billion), meat and meat products (€5.43 billion) and grain processing products (€3.56 billion). (French Customs Authorities)

3

AN ATTRACTIVE MARKET

Among the foreign groups that invested and strengthened their presence in France in 2019 were Tianlong Agriculture, Refresco, Heineken, Hendrix Genetics, Sigma, Carlsberg, Thai Union Group, Lallemand, Groupe Louis Delhaize, Nestlé, Maabarot, McCain Foods, Safinco, Bimbo, JBS S.A and Barilla. (Business France)

4

EUROPE'S #1 PRODUCER OF AGRICULTURAL PRODUCTS

France is the leading European producer of agricultural products. It is ranked first for sugar, with 5.2 million tonnes of white cane or beet sugar and 71.2 million tonnes of cereals produced in 2019, as well as 1.4million tonnes in carcass weight equivalent (CWE) of beef. (Eurostat; Agreste)

5

INNOVATION HUB

France boasts a strong R&D ecosystem, and is home to INRAE, 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 innovation 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 €25.3 billion in 2019, Groupe Lactalis (€20 billion), and Pernod Ricard (€9.2 billion).

7 A MARKET WORTH OVER €11.9 BILLION

With 2.3 million hectares, representing 13% of the European Union's (EU) organic utilized agricultural area (UAA) in 2019, France has the EU's second 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 €11.9 billion in 2019, up 13% from 2018, and French exports amounting to €826 million. (Eurostat; Agence Bio, 2019)

8 FRANCE: THE COUNTRY OF WINE

France is the world's leading wine exporter with €9.8 billion in foreign sales in 2019, or nearly a third of global exports by value. (UN Comtrade)

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.



#1
HOST COUNTRY IN
EUROPE FOR INDUSTRIAL
INVESTMENTS

(EY)



FRANCE:
#1
INDUSTRIAL SECTOR
IN FRANCE

(INSEE)



THE WORLD'S
LEADING EXPORTER
OF WINE

(GTA; AGRESTE)



ACCESS TO A MARKET
OF 67 MILLION
CONSUMERS AND
PLATFORM FOR THE
MIDDLE EAST/AFRICA
ZONE

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