

AQUITAINE, GEARED FOR INDUSTRIAL SYNERGY

AGRIBUSINESS

600 industrial establishments
33,000 jobs, 8.80 billion euros in revenues
54 quality labels, 14 PGIs and 83 PDOs

Aquitaine is one of France's leading agricultural and food producing regions. It is renowned for its fine foods and is the leading region for production in compliance with quality label standards.

As well as being the recognized world leader for foie gras and wine, Aquitaine is also:

- Europe's leading seed-corn region,
- The top fishing region in France,
- France's leading producer of strawberries, kiwis, hazelnuts, and plums, accounting for 11% of France's fruit and vegetables.

Aquitaine also plays a key role in the production of poultry, veal and top-quality beef breeds.

In the context of major public health objectives, Aquitaine agribusiness has successfully joined forces with the "pharmacy" sector within Prod'innov, to enable the nutrition industry to contribute to health.



INNOVATIVE PRODUCTS AND PROCESSES FOR NUTRITION AND HEALTH
COMPETITIVENESS CLUSTER

3A GROUPE/BONCOLAC/CANDIA, MARTINE SPECIALITES, LABEYRIE/ALFESCA, LES FERMIERS LANDAIS, LU, VIVIERS DE FRANCE, SOBEVAL, BONGRAIN/FROMARSAC/FROMAGERIE DES CHAUMES, LA COMPAGNIE DU BISCUIT, LE MAGICIEN VERT/DELPEYRAT, LINDT & SPRÜNGLI, MAÏSADOUR, FRANCE PRUNE MAÎTRE PRUNILLE, GRANDS MOULINS DE PARIS, AQUALANDE, PINGUIN, SAIPOL-LESTEUR, R&R ICE CREAM, RAYNAL & ROQUELAURE, BIGARD, MICHAUD APICULTEURS, BONDUELLE, EURALIS, GENERAL MILLS...

SANOFI AVENTIS, BMS-UPSA, MÉDA, PIERRE FABRE, AC-TEON, TECHNOFLEX, B. BRAUN, ELLIPSE PHARMACEUTICALS/BERTIN PHARMA, UNITHER DEVELOPPEMENT, FLUOFARMA, CREAPHARM, CEVA SANTE ANIMALE, MERCK SERONO, FLAMEL TECHNOLOGIES, JOHNSON & JOHNSON, MCKESSON, AGFA, BIOTRANS, GALENIX, CREASPIRE, STRYKERSPIRE, LABORATOIRE RENAUDIN, IDPS, ITEC SERVICES, MITOPROD, PANTHERGROUP, TOURNAY BIOTECHNOLOGIES, DRT, BERKEM, BIOLANDES, SAFISIS...

PHARMACEUTICALS . HEALTH

500 establishments, 10,000 jobs
2nd largest exporting sector in Aquitaine
5th ranked employment zone in France in this sector

The pharmaceutical-health sector in Aquitaine ranges from startups to major global groups, presenting a wide range of competencies and expertise in:

- pharmaceutical production,
- medical IT and software systems (top region for development in France),
- services for drug development,
- biomaterials and implants,
- medico-surgical equipment, imaging, consumables,
- cosmetics,
- active ingredients production.

The sector is characterized by a complete complementary chain of fully diversified activities ranging from research on active ingredients to final production, and including the development of galenic drugs and analysis.

FOREST INDUSTRIES

1,700 establishments
33,000 jobs
2.6 billion euros in revenues

Forest industries have a long and important tradition in Aquitaine (the largest cultivated forest in Europe with 800,000 hectares) and represent one of the region's three main production sectors along with wine-making and aeronautics.

Regional forest industries hold a European leadership position in lumber, packaging, decoration and paper pulp.

Development relies on a network of high-level maintenance service providers and numerous technological innovations:

- Surface coatings,
- Protective heat treatment,
- Microwave drying,
- Green wood finger-jointing,
- Wood/plastic composite materials.



CULTIVATED FOREST PRODUCTS AND MATERIALS
COMPETITIVENESS CLUSTER

CONDAT LECTA, SMURFIT KAPPA, GASCOGNE EMBALLAGE, SAPSO EMBALLAGES ONDULES SAICA, POLYREY, PAPERIES DE GASCOGNE, GASCOGNE BRANCHE BOIS, FP BOIS, RIGHINI, MENUISERIE GREGOIRE, PAPERIES AHLSTROM PACKAGING, EGGER ROL, CAPDEVIELLE, SOKOA, PGS BEYNEL GROUP, EVER GROUP, TARTAS TEMBEC, FINSA...

AERONAUTICS . SPACE

740 establishments
42,000 jobs
4 billion euros in revenues

Thanks to Aquitaine's long tradition in aeronautics and space and the presence of major production sites, this region is:

- A global leader in the sector of high-end business aircraft, helicopter turbines, landing gear and aircraft batteries,
- European leader in launchers and power plants, military airplanes, cockpit systems, maintenance & testing resources, and high-performance composites.

The large corporations in this sector rely on an efficient network of suppliers, offering state-of-the-art technological know-how.

The scientific and technological skills of the research laboratories include electronics, computer modeling, simulation and materials, while the engineering schools and universities develop their programs in collaboration with industrialists.

The Aquitaine and Midi-Pyrenees regions are partners in the Aerospace Valley Competitiveness Cluster.



AERONAUTICS, SPACE, EMBEDDED SYSTEMS
WORLD COMPETITIVENESS CLUSTER

IN AQUITAINE : DASSAULT AVIATION, EADS ASTRIUM SPACE TRANSPORTATION, ASQUINI, SAFRAN/SNECMA SOLID PROPULSION GROUP /TURBOMECA/MESSIER-DOWTY, SNPE MATERIAUX ENERGETIQUES, THALES DIVISION AERONAUTIQUE, DGA, AIA, SAFT, SABENA TECHNICS, AQUITAINE ELECTRONIQUE, INGENIERIE, CATHERINEAU, CREUZET AERONAUTIQUE, EADS COMPOSITES AQUITAINE, EXAMECA, LAUAK, POTEZ, FEDD, SERTA...

OPTICS . LASERS

70 companies
8,850 jobs
600 researchers

In Aquitaine, the 21st century technologies of optics and lasers open fields of application in numerous sectors, including aeronautics, space, health, energy, embedded systems, telecommunications, and others.

The dynamics of this young industrial sector are based on:

- Laser Mégajoule (LMJ), one of the two largest laser instruments in the world,
- Fast-growing, innovative, small businesses, large companies which lead their markets, and technological startups,
- One of Europe's top concentrations of research specialists in optics-lasers (CPMOH, CELIA, ILP),
- SEML Route des Lasers, a semi-private company specializing in optics-lasers to aid the setup of new and transplanted companies,
- Initial education and ongoing training resources, adapted to new needs: Institut d'Optique d'Aquitaine, and ongoing training center for laser professions (PYLA).



PHOTONICS COMPETITIVENESS CLUSTER

AMPLITUDE SYSTEMES, i2S, EOLITE SYSTEMS, ES TECHNOLOGIE, CORDOUAN TECHNOLOGIES, NOVALASE/NEXEYA, EDIT, SAGEM/SAFRAN, THALES, CEA CESTA, ASTF, PRODITEC, SOREM, POLYRISE, LYRACOM, PULSCAN, PROCONCEPT, CLAS, OXYMETAL, COVERPLANT ENGINEERING, CRESILAS, ISP AQUITAINE, PHOTONIS...

CHEMISTRY . ENERGY . ECO-ACTIVITIES

over 300 establishments
over 17,000 jobs
20% of the region's exports
34 SEVESO sites

The chemical and energy industries constitute an innovative, well organized sector with a high percentage of exports. These industries represent diversified operations in industrial chemicals and specializations (pharmaceuticals and cosmetics, para-chemistry, materials chemistry, chemistry related services), and are primarily located in the area of Pau-Lacq, the Metropolitan Bordeaux area, Agen, Bergerac and the Landes Department.

Conventional chemicals and energy, represented by the presence of major international groups, is involved in the development of new energy resources:

- **Wind Generation:** know-how in composites, electro-mechanics, port logistics, as well as engineering and research consultants, in conjunction with specific training programs, has favored the arrival of wind generator manufacturers.
- **Biomass:** the availability of varied and abundant natural resources has attracted projects using biomass for energy production.
- **Solar:** Aquitaine is home to numerous photovoltaic generating plants, including one belonging to EDF EN on a 300-hectare site, and a solar panel production plant. Two clusters focus on scientific and industrial skills: AVENIA for bio-energy and geosciences, and CREAHD for sustainable housing.

YARA, EXOSUN, SOFERTI, CEREXAGRI, AKZO NOBEL/EKA CHIMIE, ARKEMA, AIR LIQUIDE & LINDE GAS, SIMOREP, FONROCHE ENERGIE/PEVAFFERSA, ACETEX, COFRABLACK (DEGUSSA GROUP), CLARILANT, LABSO CHIMIE FINE, SANOVI AVENTIS, DYNAMIT NOBEL, L'OREAL, BERKEM, FIRMENICH, BIOLANDES, ARYSTA LIFESCIENCE, SOFICAR, SNPE, BOUCHILLOU/ALKYA, DRT GROUP, TOYAL, DERIVADOS FORESTALES, AUTOBAR PACKAGING, TOTAL, EDF EN...

BOARD SPORTS

400 companies, 3,200 jobs
1.2 billion euros in revenues

Thanks to Aquitaine's beautiful surfing beaches and tourist accommodations, this region now generates 80% of Europe's revenues in this sector and has become the European leader in the board sports industry. Major groups, including the top six global leaders in surfing, have established headquarters on the Aquitaine coast, with strategic functions and R&D, thus creating many jobs.

This market has been growing by 20% for over 10 years, and double-digit growth is forecast for the next five years. This sector is organized around the EuroSIMA cluster (European Surf Industry Manufacturers Association), and board sports attract new businesses related to sports, ready to wear clothing and sporting goods.

BILLABONG, QUIKSILVER, O'NEILL, OXBOW, RIP CURL, VOLCOM, MADA, NIXON, VESTAL, ELEMENT, DC SHOES, VON ZIPPER, ELECTRIC, NIKITA, ROXY AMBIGUOUS, CARHARTT, INSIGHT 51, RUSTY, TRIBORD/DECATHLON...

BOATING

400 companies, 30 shipyards
2,750 jobs, 270 million euros in revenues

Over the last 10 years, the Aquitaine boating industry has enjoyed growth of 5 to 10%. This sector includes pleasure boating, white-water sports, particularly canoeing and kayaking, and inland water navigation. A high-tech boating segment, oriented towards luxury high-performance catamarans and yachts is developing, and benefits from the region's high potential and clear advantages:

- The presence of two industry leaders in boating and yachting, CNB and Couach,
- Numerous niches for conventional and composite construction of single unit, customized watercraft or series production (fishing boats, pinnaces),
- The presence of equipment manufacturers: sail loft, engines, upholstery, marine electronics.

CNB/BENETEAU, COUACH, TRIBORD/DECATHLON, DUBOURDIEU, B2 MARINE, MERY NAUTIC, EPSILON COMPOSITES, DORGULOFF, NANNI INDUSTRIES, FURUNO, STAR VOILES, MARINE EXCEPTION, NAUTI BOY, ROTOMOD, PROPLAST, COMPOSITES 64, MAXSEA...

A VERSATILE INDUSTRIAL ENVIRONMENT

All industrial sectors are present in Aquitaine possesses. Its industry also thrives thanks to information and communications technology.

In this region, at the heart of the digital revolution, its original and innovative companies develop IT products and services, telecommunications, create multimedia content, and supply equipment and networks.

Nearly 2,000 companies, accounting for over 21,000 jobs, put Aquitaine among the top four French regions.

In addition, the virtual and augmented reality sector, stimulated for over 15 years by the region's recognized players, and the video game-sector, increasingly contribute to the region's economy.

IMAGE TECHNOLOGIES AND VIRTUAL AND AUGMENTED REALITY: INRIA BORDEAUX, ESTIA INNOVATION, XYZ IMAGES, IMMERSION, LUMISCAPHE, MERCURY, STONFIELD INWORLD...

VIDEO GAMES (CENTERED ON THE BORDEAUX GAMES ASSOCIATION): ASOBO STUDIO, ATONCE TECHNOLOGIES, BETOMORROW, SC2X/MONKEY STUDIO, SOLID CREATIVITY, MIMESIS REPUBLIC...

AQUITAINE INVESTING IN YOUTH AND EDUCATION...

... with 103,000 students, a university rated among the top 10 French campuses of excellence.

Shanghai Jiao Tong University's Academic Ranking of World Universities places the University of Bordeaux in the top 75 worldwide in the field of Engineering/Technology and Computer Sciences.

Thanks to its high educational level, the region significantly contributes to research and essential partnerships with industry.

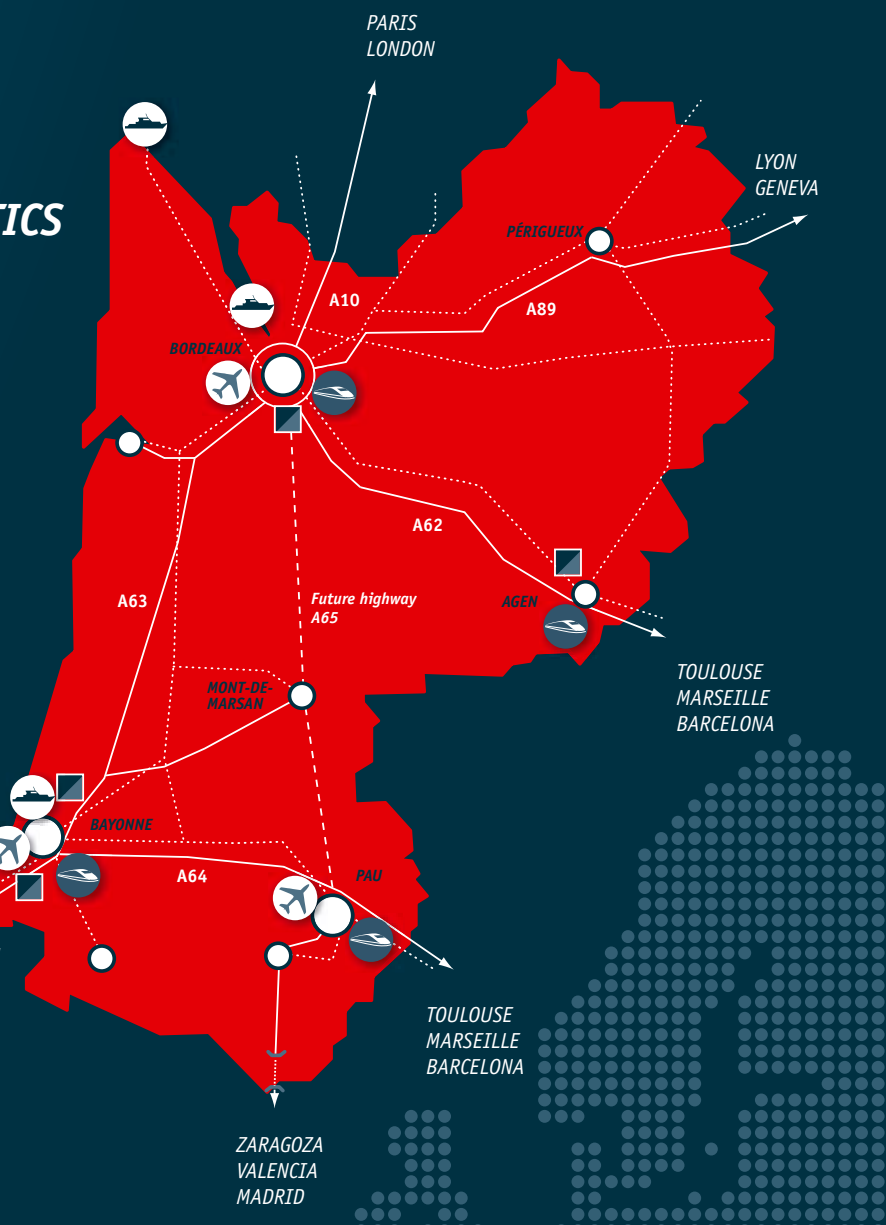


STRATEGICALLY LOCATED ON EUROPE'S NORTH-SOUTH LOGISTICS ITINERARY, BORDERING SPAIN

The Aquitaine region has a surface area as large as Belgium or Switzerland. Its location on the Spanish border, its excellent transportation network, and its transport facilities meet all the requirements for international competitiveness:

- **6 airports**, including three which are international,
- **2 hrs from Paris, 3 hrs from Madrid, and 1:45 hrs from Bilbao**, with the future Southern Europe Atlantic high-speed train line,
- Located on the Atlantic coast, with several multimodal transport hubs: the ports of Bordeaux and Bayonne,
- As well as combined transport hubs.

- Ports
- Airports
- Major high-speed train stations
- Combined rail-road transport hubs
- Rail connections
- Main road and freeway infrastructures



For you investment project

Our network of experts can provide you with **comprehensive assistance**, free of charge, and with total **confidentiality** for various aspects of your project:

- Identify future **partners**
- Find **sites** suited to your needs, organize visits
- Assist you with **formalities**, maximize **subsidies**

INVEST IN AQUITAINE, a mobilized regional network

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www.perigord-developpement.com

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www.bordeauxregion.com

LANDES
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CONTACT

Agnès Champalaune
Regional development and inward investment coordinator
2ADI Invest in Aquitaine
Phone: +33 5 57 57 84 95
agnes.champalaune@2adi.aquitaine.fr
www.2adi.fr



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AQUITAINE INDUSTRY

THE BEST REASONS TO INVEST IN AQUITAINE

*It is not just the exceptional setting, or the reputation for fine wines and gourmet dining which attract investors to Aquitaine...
With sustained population growth, dynamic industry, research and competitiveness clusters, Aquitaine offers a wide range of geographic, economic and human-resources advantages.*

AN ECONOMIC ENVIRONMENT SUITED TO YOUR BUSINESS

- One of the top three French regions for GDP growth
- An employment zone of 1.4 million people in activity, stimulated by population growth averaging over 6.2% for the past 10 years, and a growth outlook greater than the national average
- **Leading French region for portion of its budget invested in R&D:** 11 million euros of regional aid devoted to innovative projects in 2007 with **130 research laboratories, 11,300 research scientists** and over 100,000 students
- **Fifth ranked region in France** as a destination for foreign investments (by number of jobs created in 2008), and more than 400 foreign companies located here
- A dynamic industrial fabric with some **400 international groups**, backed by a network of efficient and competitive suppliers
- **A pro-entrepreneurship region:** fifth in France for the proportion of business creation and transfers in France

COMPETITIVE CONDITIONS FOR BUSINESS LOCATIONS

- Real-estate costs **30% below the average for the Paris region**. Cost of living 20% less than Paris
- Technical and financial **support mechanisms for businesses**, backed by a strong political determination.
http://interventions.aquitaine.fr
- To receive your business location project, Aquitaine offers **specialized business sites** suited to your needs, **with shared services and resources**

Business sites (examples)

- > **Aeroparc**, near the Bordeaux Airport runways, neighboring top companies in aeronautics and space, and offering all of the advantages of a major European site.
- > **Aeropolis**, near Pau, specializes in new business operations related to aeronautics, in the industrial zone of Bordes-Assat, near Turbomeca.
- > **Technocité**, neighboring Dassault Aviation Biarritz, markets premises devoted to composite materials and aeronautics maintenance, repair and overhaul.
- > **Bioparc**, in Pessac, will welcome companies in the health-care sector in 2010 near the Bordeaux University Campus and Hospital.
- > **Laseris, La Cité de la Photonique/Unitec**, near the Laser Mégajoule and the University of Bordeaux, are scientific and technological parks devoted to industry and services in the optics-laser sector.
- > **Agropole**, in Agen, provides premises for one hundred companies, with shared services including 30% of the French agribusiness quality criteria.
- > **Chemparc**, near Pau, is a Seveso 2 site, offering shared services, and totaling 4,000 employs in the chemical sector.
- > **Ecoparc**, in the metropolitan Bordeaux area, offers an 80-hectare site, including a services center and a business incubator specializing in industrial eco-operations.
- > **The Montesquieu site**, in Martillac, focuses on eco-technologies and includes a 3,500 m² solar energy plant with adjustable solar panels.
- > **Atlantisud**, is an industrial park specialized in logistics, located in the southern portion of the Landes Department, along the A63 tumpike, 20 minutes from the port of Bayonne.
- > **Baia Park**, located in Anglet, is a business park devoted to the board sports sector.
- > **Escat**, in Bergerac, is a Seveso 2 site, covering 96 hectares.
- > **A network of competitiveness clusters and business incubators** to assist in new business creation.