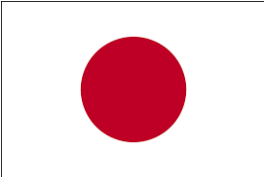


Welcome to Japanese Companies in Occitanie/Pyrénées-Méditerranée



September 2017

  2nd largest region of mainland France

 **13 departments**

The French region which has the most



Larger than Ireland
70,273 km²



2x

Catalonia
32,113 km²

2x

Belgium
30,528 km²





A strategic position

**At the heart of Southern Europe,
a springboard to reach the
Mediterranean markets**



Multimodal and efficient transport facilities

- 9 airports including 3 international airports:
- A vast motorway network
- High-speed rail lines (Montpellier => Paris (3h30))
- Rolling motorway from Luxemburg to Le Boulou
- 3 maritime trade ports and 5 fishing ports
- 3 river ports plus the Rhone canal in Sète, the Canal du Midi
- The « dry port » in Eurocentre, north of Toulouse, the domestic terminal of Barcelona's port authorities



One of the most densely populated in Europe



- **Highest population growth in France**
+ 53,000 new residents every year



- **Among the top 5 in France for population density**
19th European region out of 275
with 5.7 million inhabitants

- **2 capital cities: Toulouse and Montpellier,**
respectively 4th and 8th French city for the number
of inhabitants



**20 M consumers within a 300 km
radius around Toulouse**



An economic momentum standing out at national and European level



- **GDP of 152 billion, comparable to Ireland's**
 - Strongest GDP growth in France
 - In the top 20 at European level (out of 275 regions)
- **Employment area of 2.2 million jobs**
- **Foreign investment**
 - 2nd French region hosting projects in 2016
 - 5th French region in terms of jobs



- **Leading French region in business creation rate**



- **2nd French region for the number of start-ups created**



A concentration of brainpower

Higher education

- 35 prestigious higher education establishments
- 2 federal universities in Toulouse and Montpellier as well as universities spread across the territory
- 3rd student area in France – nearly 230,000 students



R&D and technology transfer



- 1st region in France for R&D expenditure (€5.6 billion/year)



- 3rd French region for European patent filing
- 18th European region out of 275 for research intensity (over 3% of GDP)
- 29,400 are employed in research, 2 out of 3 in the private sector

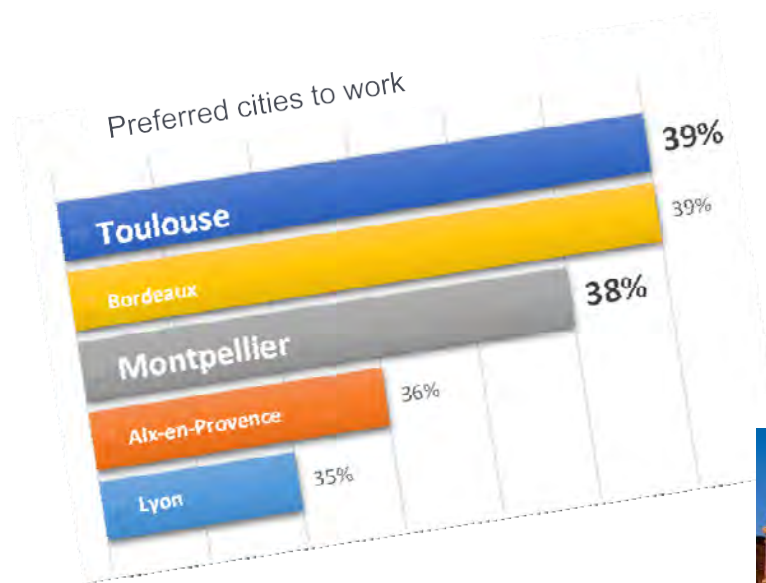


Université
de Toulouse



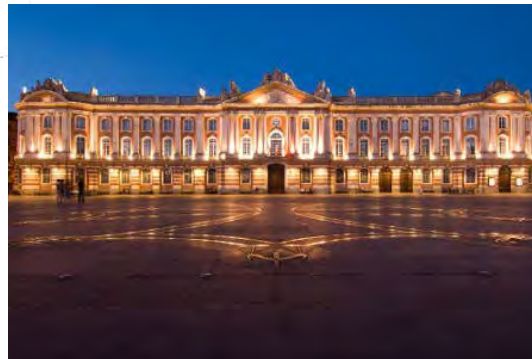
A great place to live, study and work

- Toulouse and Montpellier in the top 4 of the most popular French cities to work and to study
- Toulouse in the top 50 of the most popular university cities in the world



- Over 290,000 foreign residents
- 34 consulates or consular offices
- International educational institutions from primary to university level

Survey carried out by the Great Place to Work® Institute
August 2014



An exceptional quality of life

4

- **4th French region for tourism** with 30 million tourists per year and €13 billion income from tourism
- 8 UNESCO World Heritage sites
- 14 sites labelled as « Grands Sites de France »

3

- **3rd region** with the highest number of historic monuments and music festivals
- 2 national parks, 1 marine nature park, 6 regional nature parks
- 215 km of coastline, 40,000 ha of lakes and coastal lagoons
- 38 winter sports resorts
- 20 seaside resorts on the coast
- 1st spa region for the number of spa houses and 166,000 spa guests




Leading sectors in Occitanie/Pyrénées-Méditerranée



Leading sectors in the region

Aeronautics and space



- World leader in civil aeronautics
- 86,000 direct jobs in aeronautics and space
- Presence of 3 European aircraft manufacturers: *Airbus (world headquarters), ATR, Daher*
-  Leading European region for space and space applications
- 25% of the European workforce in space industry



ADSpace, Airbus, Air France, CLS, CNES, Figeac Aero, Liebherr, Meteo France, Ratier Figeac, Telespazio, Thalès Alenia Space, Safran, Stelia, Latécoère

Digital, electronics and embedded systems



- 4th region in France for ICT: 62,500 jobs in 18,500 companies
- 1 digital business cluster: Fusion between FrenchSouthDigital (Montpellier) and Digital Place (Toulouse) in January 2017
- 2 certifications « Métropoles French Tech » (Toulouse and Montpellier)
- 1 cluster on robotics: RoboticsPlace
- Key strengths: IoT, robotics, software certification, business software edition, virtual reality, open source, smart city, cybersecurity, Big Data



Adelya, Assystem, CGI, Continental, Dell, IBM, IGE XAO, Intel, Rockwell Collins, Sogeti, Sopra Steria, Ubisoft, Vector

Leading sectors in the region

Agriculture and Food Industry



- Largest wine-growing area in the world for wines with a controlled denomination of origin



- Leading organic region in France (largest organic-farmed area)



- 2nd French region for meat production
- 3rd region for fruit and vegetable production
- 3rd agri-food region with 7,000 farming settlements
- Leading region for products under label of quality and origin



Andros, Arcadie SO, Blue Whale, Cémoi, Haribo, Jacques Vabre, Mars, Nestlé Waters, Nutrition & Santé, Plaimont producteurs, Roquefort Société, Raynal & Rauquelaure, Salins du Midi

Health - Biotechs



- Over 240,000 jobs in the health sector, including 24,000 in the health industry

- 3 University Hospital Centers: 1st Toulouse, 6th Montpellier and Nimes – source: Le Point « Awards of the 50 best hospitals in France »
- Oncopole Toulouse: unique site in Europe fully dedicated to cancer fight
- Strong position on key segments: diagnosis, medical devices, ageing, dependency



AB7 Industries, Almerys, Argene, Bausch&Lomb, Horiba Medical, Pierre Fabre Laboratories, Sanofi

Leading sectors in the region

Eco-activities - Water - Energies



Eco-activities (water, waste, eco-materials): 22,500 jobs, 2,150 companies

Renewable energies:

- 2nd French region for the production of renewable energies
- 2nd region in photovoltaic production, 2nd in hydroelectric
- 3rd in wind and 5th in biomass
- 1st region in the development potential of offshore floating wind power



- 1st region in number of "positive energy green growth territories"

ABC Membranes, BRL, Enercon, CACG, Polymem, Quadran, Saur, Seche Environnement, Suez Environnement / SITA France, Sunpower, Urbasolar, Veolia Environnement, Vestas

Intelligent transport systems



- 2 clusters: Mipyrail Innovation and Automotech cluster
- 7,000 jobs in the rail sector
- Over 11,000 industrial jobs in the automotive sector
- 37,000 service jobs in the automotive sector



Actia, Alstom, Bosch, Continental, Johnson Control, NTN SNR, NXP, SAM, Safran, Valeo,

Leading sectors in the region

Logistics and transport



- Local expertise on all four transport modes
- Almost 61,000 jobs in more than 6,300 businesses
- 2 rolling motorways: Luxembourg-Le Boulou and, since 2015, Port of Sete-Paris
- Ports' logistics and intermodality:
 - 3 maritime trade ports
 - 4 multimodal platforms



Capelle International, Denjean Logistique, Eurorail, Express maree, FM Logistic, Geodis/Calberson, SEA-invest, TAB Rail Road

Tourism - Nautism - Thermal Spa



- 4th most popular French region for tourism
- 4th region for tourism-related jobs: 108,000
- 1st thermal area for the number of establishments: 166,000 visitors
- €14 billion income from tourism
- 221 billion overnight stays a year (hotels, guest houses...)
- 6,600 jobs in the nautical industry
- Leading region for the manufacture of cruising catamarans



Belambra, Catana Catamaran, Le Boat, Odalys, Outremer, Sibliu Villages, Swiss Catamaran

Recent success stories in terms of intelligent mobility

During the Summer of 2016, Continental Digital Services launched a new R&D division in Toulouse



Continental Automotive in Occitanie

- 3 industrial plants
- Employs 2,500, including 1,000 engineers
- Electronics and data services (captors radars, cameras, lidars)

- 200 to 300 job creations in R&D
- Active player in the eHorizon project (Driving assistance system) : real-time data
- €200 M investment over a 5-year period



Recent success stories in terms of intelligent mobility

January 2017, Hyperloop Transportation Technologie sets up in Toulouse



Future demonstrator in Franczal (31)



50 jobs created



New concept of very high speed transport



Recent success stories in terms of intelligent mobility

Additive Manufacturing: our region welcomes the technologies of the future



30 companies encompassing the whole production chain



FormUp TM 350



Let's meet on 21st and 22nd November 2017 in Toulouse during the Aerospace Additive Manufacturing Summit Business Convention

Focus on Aeronautics in Occitanie/Pyrénées-Méditerranée





At the heart of Aerospace Valley



Global cluster for aeronautics, space, embedded systems

- 1,700 companies,
- 140,000 industrial jobs
- € 10 billion annual turnover
- Aerospace employs 1 out of 3 working adult in the sector
- Over 850 members
- 921 R&D projects approved





At the heart of Aerospace Valley

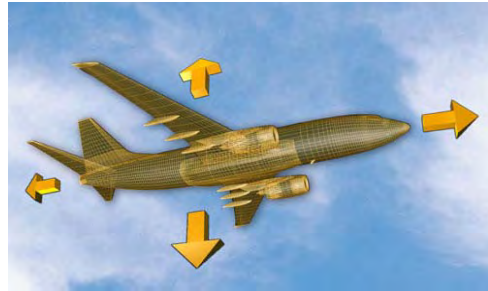


8 strategic business areas in core R&D sectors:

- **AMP - Aero-mechanics, materials and procedures**
- **ESE – Energy and electro-mechanical systems**
- **STA – Solutions for the air transportation system**
- **TOP - Telecommunications, observation, positioning**
- **SOCLE – Embedded systems, connected objects, tools and electronics**
- **IHS – Human-system interface**
- **USeR– Factory, support, MRO and MCO and cabin interiors**
- **MSA – Modeling, simulation and analyses of data**

Airbus, ATR, Latécoère, Dassault-Aviation, Stelia Aerospace, ...
Thales Alenia Space, Airbus Defense & Space, SAFRAN Group, ...
Alstom, Continental, Thales Avionics, ...

Triple helix concept



RESEARCH

IRT, Universities, CNRS, ONERA,
INRIA, CNES, CEA, CERFACS

INDUSTRY



TRAINING

ISAE (SUPAERO & ENSICA),
ENAC, ENSMA, EMAC, INPT,
INSA, ENSAM, Universities, ...



Aeronautics, space and embedded systems:

= 129 300 direct jobs in the (former) Midi-Pyrénées and
Aquitaine Regions (Dec 2015, source: INSEE poll institute)

= 1/3 of overall French work force in these sectors

R&D Funding mechanisms

Accumulated numbers (as of March 2017):

- 947 R&D projects approved by internal Aerospace Valley committee
- 502 projects finally financed with accumulated 1850+ participants
- 3rd phase : gearing towards industrialisation of R&D projects



- | | |
|---|---|
| • Total value of all financed projects: | 1.23 B€ |
| • Total amount of private funding: | 722 M€ |
| • Total amount of public funding: | 508 M€ (40% via FUI)
(of which 32% for SMEs) |



© AIRBUS SAS 2013 - photo by e'm company / A. DOUMENJOU

World leader in civil aeronautics





Occitanie / Pyrénées-Méditerranée, world leader in civil aeronautics

- HQ of Airbus Group,
- 3 aircraft manufacturers: Airbus (HQ), ATR (HQ), Daher

N°1 for civil & turboprop airplanes
worldwide

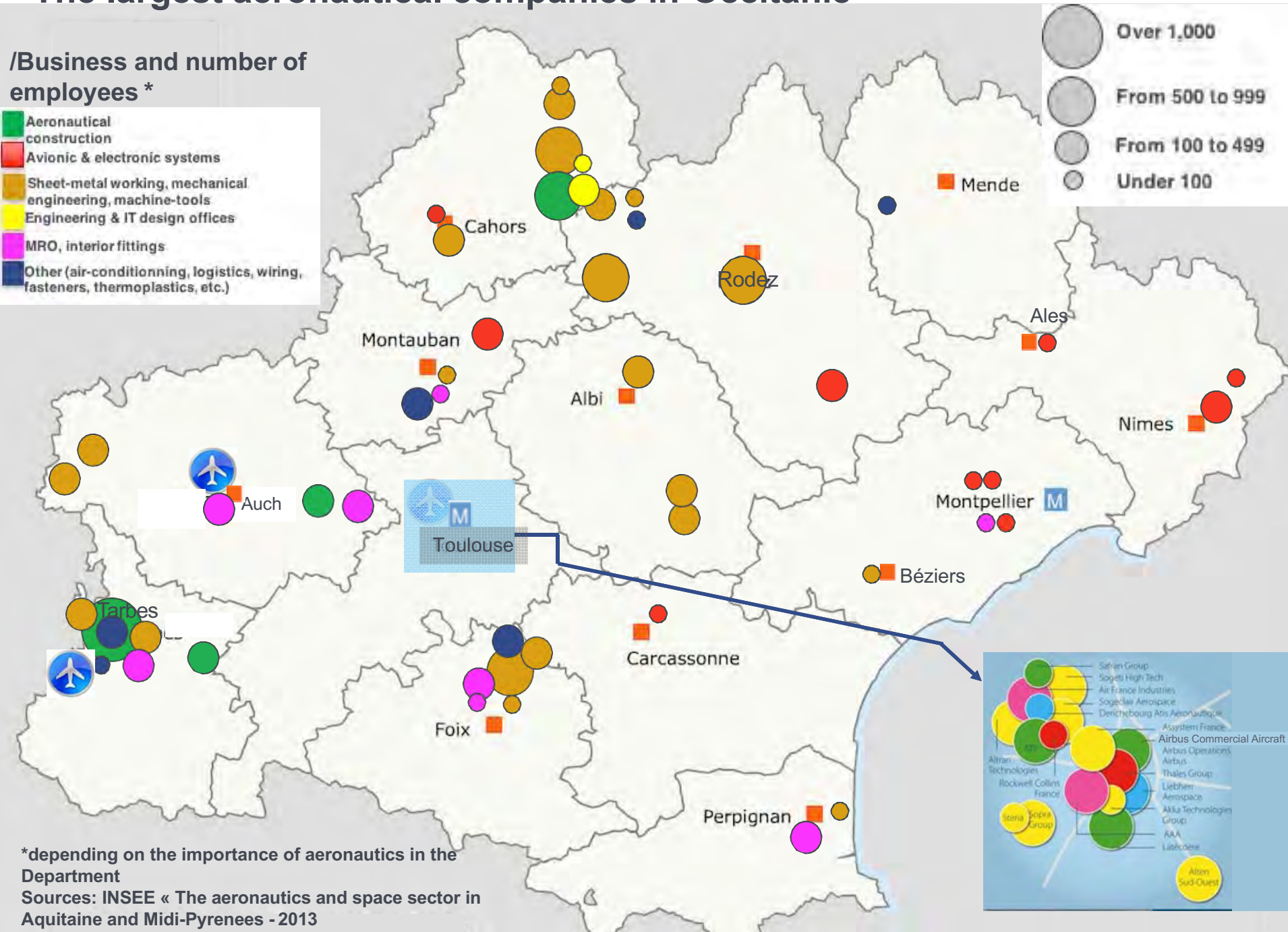
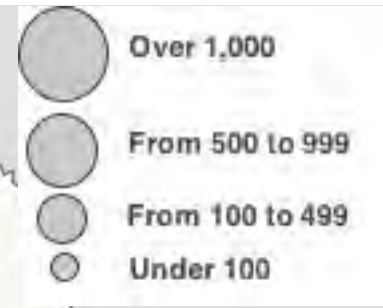
N°1 for software certification
worldwide

N°1 for embedded systems for transports
in Europe for testing
for aircraft interiors

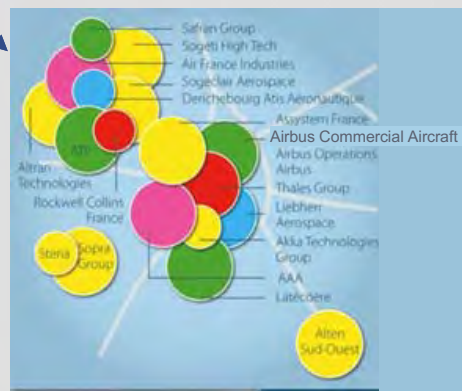
> **700** companies - **71,000** employees

The largest aeronautical companies in Occitanie

/Business and number of employees *



*depending on the importance of aeronautics in the Department
 Sources: INSEE « The aeronautics and space sector in Aquitaine and Midi-Pyrenees - 2013










Occitanie / Pyrénées-Méditerranée, world leader in civil aeronautics

	Main companies	Leadership
	AIRBUS GROUP	World leader in aeronautics, space, defense and related services (executive functions, central entity, strategy, finances) 1,500 employees in Occitanie
	AIRBUS COMMERCIAL AIRCRAFT	Design offices and assembly plants of the Airbus A320, A330, A350 et A380 - 21,000 jobs in Occitanie
	ATR	World leader on the market for regional aircraft up to 90 seats - 1,200 jobs in Occitanie
	DAHER	Aircraft manufacturer and tier-1 aerospace and defense supplier - 1,500 jobs in Occitanie
	SAFRAN Group	World leader in aircraft propulsion and equipment, defence and security. 3,000 jobs in Occitanie in different subsidiaries
	LATECOERE	Design, manufacture of airframes, wiring, embedded systems, and engineering services - 2,000 jobs in Occitanie
	STELIA AEROSPACE	European leader for civil aircraft airframes, N°3 worldwide for seats for first & business class 2,000 jobs in Occitanie



Occitanie / Pyrénées-Méditerranée, world leader in civil aeronautics

	LIEBHERR AEROSPACE (HQ)	One of the leading OEM in aircraft air management, flight control and actuation systems, hydraulic and landing gears systems 1,200 employees in Occitanie
	RATIER - FIGEAC	World leader for large propeller systems and a OEM for all major airframe and aerospace manufacturers 1,100 employees in Occitanie
	THALES AVIONICS	Global leader in onboard electronics for aircraft, supplying avionic suites and systems to major aircraft manufacturers 1,000 employees
	LISI AEROSPACE	Worldwide manufacturing specialist for fasteners and structural components used for the airframe as well as the engine of the aircraft – 600 employees
	SABENA TECHNICS	French leading independent provider of maintenance (MRO) and modification services for the civil and military aircraft business – 400 employees in Nimes and 50 in Toulouse



Occitanie / Pyrénées-Méditerranée, world leader in civil aeronautics

In the Occitanie / Pyrénées-Méditerranée region, we design, manufacture and maintain aircraft from A to Z

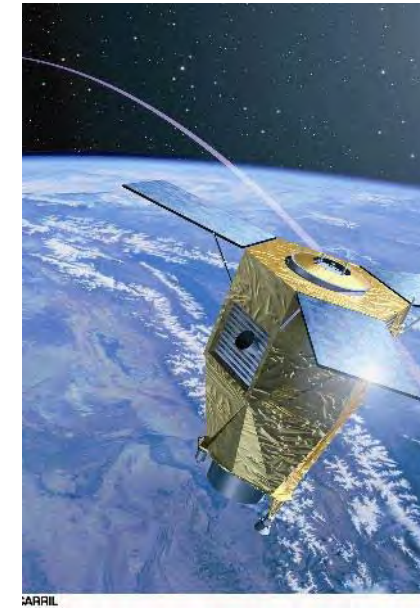
Design offices, AVIONICS, metallurgy,
production of composite parts and aerostructures, SHEET METAL WORK, machine tools,
mechanical engineering,
EQUIPMENTS, INTERIOR FITTINGS, recycling,
software development, embedded systems,
final assembling, air traffic management,
MRO, TESTING, AIRCRAFT DISMANTLING, etc.

- Leading international test center for airframes and aeronautics materials
- 86 foreign companies in this sector (32,000 jobs)

Aeronautics in Occitanie / Pyrénées-Méditerranée

A related sector of excellence: **Space industry**





- 260 companies – 12,000
- 50% of the national workforce, 25% of the European workforce
- World leader for space altimetry, space probe, data collection, navigation
- European leader for:
Design, development, integration, satellite station acquisition & keeping (Earth observation) & radar technology
Telecommunications via satellites
Satellite navigation applications





Aeronautics in Occitanie / Pyrénées-Méditerranée

A related sector of excellence: **Space industry**

Company name	Business activity
 <p>THALES ALENIA SPACE</p>	<p>Leading European satellite specialist & major player in space infrastructures 2,500 employees in Occitanie</p>
 <p>AIRBUS DEFENCE & SPACE</p>	<p>Leading European satellite specialist, 3rd in the world, it deals with every segment of the industry 3,500 employees in Occitanie</p>
 <p>CNES</p>	<p>Toulouse Centre of the French Space Agency Prime contractor for major institutional space programs & preparation of the future 1,700 employees in Occitanie</p>
 <p>METEO FRANCE</p>	<p>Central meteorology operations center ENM (National Meteorology School) Meteo France National Research Center (CNRM) 1,000 employees in Occitanie</p>

Aeronautics in Occitanie / Pyrenees Mediterranée

Occitanie / Pyrénées-Méditerranée, a European reference in R&D and training



- IRT Saint Exupéry – Technological Research Institute

World class R&T centre in

Focus: embedded systems, multifunctional materials, more-electric aircraft

250 researchers (by 2017)



- A CEA Tech R&T platform
Objective: disseminate the key technologies developed by CEA researchers in local SME's

Aeronautics in Occitanie / Pyrénées-Méditerranée

The first Airbus BizLab opened in Toulouse

- Boost aerospace innovation
- A global network of accelerator facilities to speed up the transformation of ground-breaking ideas into valuable business propositions
- A concept mixing internal and external participants





Aeronautics in Occitanie / Pyrénées-Méditerranée

Occitanie / Pyrénées-Méditerranée, a European reference in R&D and training

- Occitanie region, a major university center (230,000 students)
- 2 out of 3 “Grandes Ecoles” major French engineering schools are located in Toulouse ISAE and ENAC (French Civil Aviation University)
- Two Sciences University and 5 “Grandes Ecoles” with extensive expertise in aeronautics
- Over **16,500 students trained every year in the aeronautics and space sectors**





Aeronautics in Occitanie / Pyrénées-Méditerranée

Occitanie / Pyrénées-Méditerranée, a European reference in R&D and training

Vocational training

- IAS (Aeronautics and Space Institute)
- Air Business Academy
- ATR Training center
- Airbus training and Flight Operations Support Division
- ECATA (European Consortium For Advanced Training in Aerospace)
- SEFA (Operational Service for Pilote Training)
- Aerospace MBA and Toulouse Business School
- Programs in Air Transport Management ENAC...



Madeeli and major Aeronautics events

Meet us at these aerospace upcoming shows



- **Le Bourget/Paris Airshow:** Aerospace industries, 19th to 25th June 2017
- **MRO:** MRO Europe, 3rd to 5th October 2017 - London
- **Aerospace Additive Manufacturing Summit (AAMS):** 21st & 22nd November 2017 - Toulouse
- **AIME:** 23rd & 24th January 2018 - Dubai
- **Aircraft Interiors:** 10th-12th April 2018 - Hambourg
- **Aeromart Toulouse,** every other year end November 2018

Come and meet us!



Aeromart Toulouse

Aeromart Toulouse, the leading business convention for the aerospace industry in Europe



2016 data:

- 1,300 companies
- 2,500 attendees
- 45 countries represented
- 15,000 « one-to-one meetings »
- The green village
- Aeromart Summit

**Participate in next Aeromart:
in November 2018!**



Aeromart Toulouse

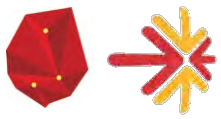
The leading business convention for the aerospace industry in Europe

Main prime contractors at Aeromart 2016



What about the relationship between Japan and Occitanie

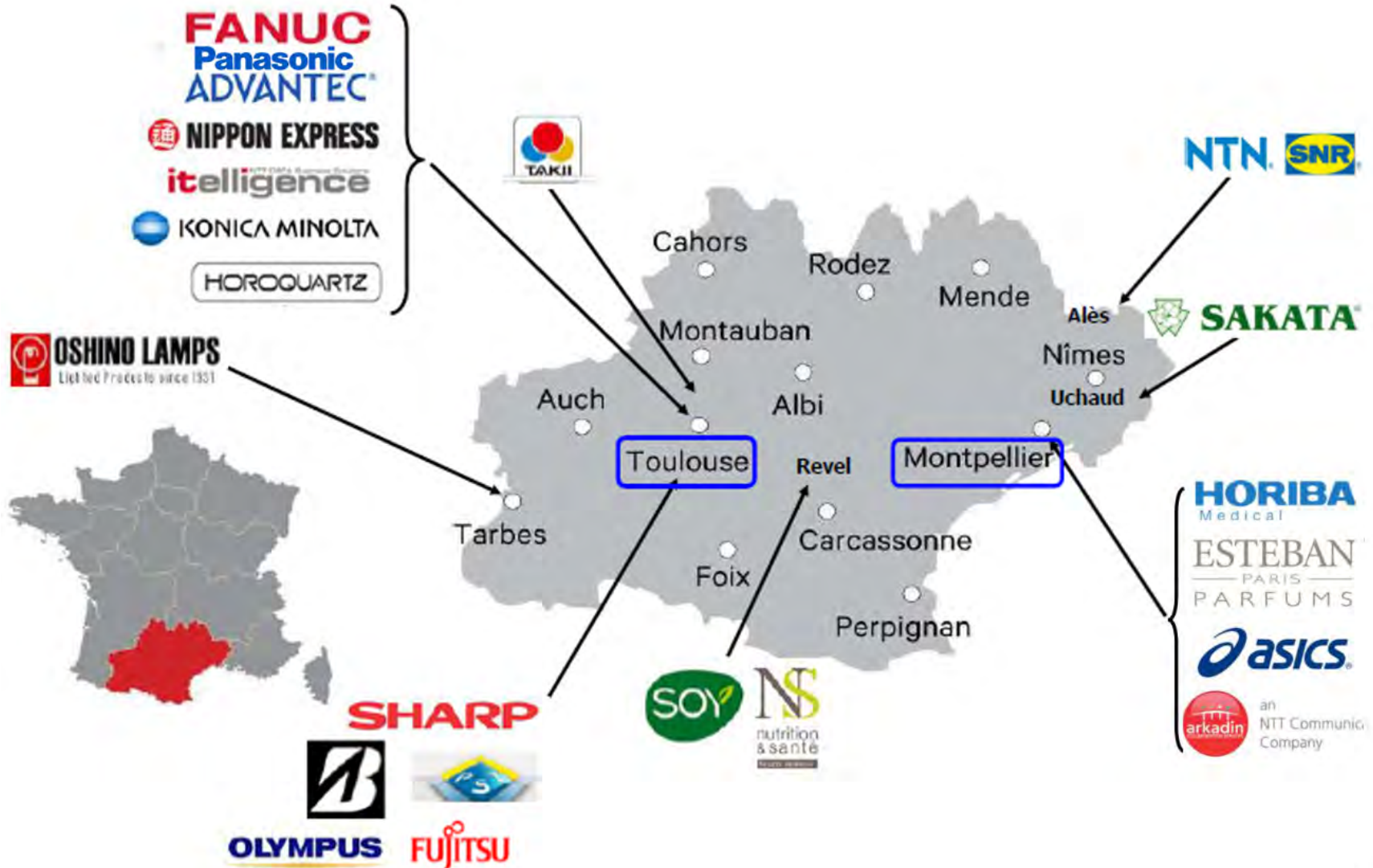


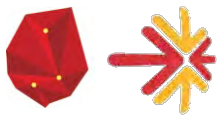


These Japanese companies chose our region

21 Japanese-owned companies

Employing around 3,400

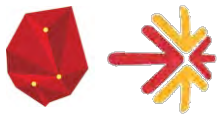




These Japanese companies chose our region

List of main Japanese-owned businesses in Occitanie

Company	Mother company	Activity	Postal code	City	Staff
ARKADIN	NTT COMMUNICATION GROUP	Telecommunication, webconferencing	34	MONTPELLIER	130
ASICS France	ASICS - Japon	Wholesale of footwear and sportswear	34	MAUGUIO	85
ESTEBAN SA	NIPPON KODO	Manufacture of perfumes	34	LAVERUNE	70
HORIBA MEDICAL	HORIBA Ltd - Japon	Manufacturing and marketing of instruments and reagents for hematology and biochemistry	34	MONTPELLIER	800
BRIDGESTONE FIRESTONE	BRIDGESTONE CORPORATION	Tire and rubber company	82	MONTAUBAN	50
SAKATA VEGETABLES EUROPE	SAKATA SEEDS CORPORATION - Japon	Research, production, marketing of vegetable seed	30	UCHAUD	130
SNR CEVENNES	New Technology Network - NTN	Production of bearings for the automotive industry	30	SAINT PRIVAT DES VIEUX	400
HOROQUARTZ	GROUPE AMANO	Software developer	31	TOULOUSE	
FANUC FRANCE	FANUC	Automation solutions	31		5
ITELLIGENCE AG	NTT DATA	Information technologies	31	COLOMIERS	2



These Japanese companies chose our region

List of main Japanese-owned businesses in Occitanie

Company	Mother company	Activity	Postal code	City	Staff
FUJITSU SYSTEMS EUROPE	Fujitsu	Data processing	31	TOULOUSE	15
KONICA MINOLTA FRANCE	KONICA MINOLTA HOLDINGS Inc.	Office machinery	31	TOULOUSE	35
NIPPON EXPRESS FRANCE	NIPPON EXPRESS	Logistics	31	TOULOUSE	3
OSHINO LAMPS FRANCE	OSHINO LAMPS LIMITED	Aeronautics lamps	65	JUILLAN	11
NUTRITION ET NATURE	OTSUKA PHARMACEUTICAL	Soya dietetic products	31	REVEL	640
NUTRITION ET SANTE	OTSUKA PHARMACEUTICAL	Dietetic products	31	REVEL	570
OLYMPUS FRANCE	Olympus Corp.	R&D medical endoscopy	31	RAMONVILLE ST AGNE	4
PANASONIC AVIONICS	Panasonic Corp.	In-flight entertainment and communication systems (IFEC)	31	TOULOUSE	50
PST	ICOM INC	Marine electronic equipment	31	TOULOUSE	36
SHARP (EX-SOFEB)	Sharp Electronic France	Office machinery and equipment	31	TOULOUSE	351
TAKII FRANCE	TAKII & COMPANY, LIMITED - (KYOTO) - (Japon)	Seed : R&D, testing, sales	82	GRISOLLES	13

Business opportunities in Occitanie





Port of Sète-Frontignan



Maritime gateway to Southern Europe, close to the Iberian peninsula and central France



- **2nd deep water port** on the French Mediterranean
- **1st fishing port** on the French Mediterranean
- **Port on a human scale:** speed of port passage, skilled labor
- **Multimodal service**

Situated along the French Mediterranean coast and equidistant from the ports of Marseille and Barcelona, the port of Sète enjoys a privileged geographical location close to the main east-west and north-south maritime routes.

For shippers located in its natural hinterland, the port offers all the services one would expect from a multi-modal logistics platform thanks to its excellent road, rail and river connection.

The port of Sète is human-sized and plays a key role in its day-to-day contact with its customers to ensure a personalized and efficient service.

Port facilities:

- **140** hectares of harbor area
- **130,000 sqm** warehouse
- **102** hectares of median
- **42 km** of railway tracks



KEY FIGURES



2nd deep water port
In the French Mediterranean



1200
escapes/an

7
postes Ro-Ro



€ 400 million

Public/private investment
(2008-2020)



120 tons
(lifting capacity)

3,550 m
Berthing quays



3 multimodal
means of transport



10
specialised
terminals



1
cold store

Total annual traffic amounts to 3.8 million tons of goods broken down as follows:



1,69
MT

Liquid bulk
(hydrocarbons, biofuel, wine, oil, etc.)



1,39
MT

Dry bulk
(seeds, cereals, oil-cake, fertilizers, metallurgical coke, sodium carbonate)



0,66
MT

Breakbulk
(paper pulp, live animals, heavy packages, ro-ro transport, etc.)



130 000

Ferry-boat passengers



40 000

Cruise-line passengers





July 2017

P&O Ports agrees lease deal for Port of Sète, to serve South of France

Dubai, UAE, 11 July 2017: P&O Ports has won a three-year management contract to operate the container terminal in the Port de Sète in the south of France under an agreement which can also be converted to a long-term concession in the future.

The contract will see P&O Ports operating a container yard with a draft up to 14,5m draft with 457 metres of quay and adjacent 2 hectares land. The container terminal is expected to commence operations in October 2017.

Sultan Ahmed Bin Sulayem, Chairman of Ports Customs and Freezones Corporation (PCFC) in Dubai, said: “Port De Sète has great potential and is ready to become another gateway port for France. In the early stages it will continue to primarily cater for feeder services in the eastern Mediterranean, the Maghreb region and North Africa. Once development takes place with the backing of our regional partners we expect to see more multinational shippers use its services with other international destinations added over time.”

Jean Claude Gaysot, Chairman of the Port de Sète said “ We are pleased to be working with P&O Ports, who is independent and a source of great opportunity with a well-know brand having a worldwide reputation in the shipping sector whose global operations, with DP World network make them an attractive and reliable partner with the Region Occitanie”.





A tourism business opportunities: « Domaine de Montlobre »

*A redevelopment project
An exceptional place for the development
of wine tourism in Occitanie*



Location

- In the commune of Vailhauquès (Hérault)
- Connection to the A9 at 36 km, A75/E11 at 26 km, A750 at 6 km
- 19 km from Montpellier and the Montpellier-Méditerranée airport, 30 km from the beach
- 40 km from Sète, 104 km from Narbonne, 165 km from Perpignan, 250 km from Toulouse

Type of opportunity

- Agricultural property of 135 hectares in a rare find located just outside the town
- Ideal for an agro-tourist development project



Descriptive

Land

- The continuous estate extends over more than 250 ha (170 ha on the Domaine de Montlobre, 80 ha on the Domaine de la Jasse), in the immediate vicinity of Montpellier. The project covers approximately 2.5 hectares.

Building

- a wine cellar, a restaurant, a reception room
- a Chapel (reception rooms)
- a « relaxation area », swimming pool, Spa
- an olive grove and a vegetable garden
- a hotel residence with 37 units, for a total of 74 rooms



Do you have a plan to expand or set up?
Choose Occitanie/Pyrénées-Méditerranée, in the South of France

Meet the right partners, discover the potential of our region.

We are there to help you bring your project to life

Free and personalized support of your project

2 entry points



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Madeeli

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September 2017