Auvergne in figures

**Area**
26,000 km²
(4.8% of France)

**GDP per capita**
24,920 €

**Regional capital**
Clermont-Ferrand: 144,817 inhabitants
287,800 inhabitants including the suburbs
655,000 inhabitants in the metropolitan zone
(from Vichy to Brioude and from Thiers to the Combrailles)

**Population**
1.351 million inhabitants
(2.1% of the French population)

**Population density**
52 per km²

**Labour rate**
71%

**Birth rate**
10‰

**Employment by sector**
- Agriculture: 4.9%
- Manufacturing: 15.9%
- Construction: 6.9%
- Services: 72.3%

**4 départements**
- Allier
- Cantal
- Haute-Loire
- Puy-de-Dôme

Source: INSEE
A STRATEGIC LOCATION
- An efficient highway network
- The Clermont-Ferrand Auvergne International airport
  Regular flights to Paris, Lyon, and Amsterdam.

FAVOURABLE ENVIRONMENT FOR INITIATIVE AND ECONOMIC DEVELOPMENT
- A highly skilled labour force.
- Technical and financial support.
- A broad range of services available for businesses.

A FIRST-RATE LIVING ENVIRONMENT

AN INNOVATIVE REGION
- 3 Highly Competitive Business Clusters including research and education sector.
- 8 Clusters of Excellence
  Renowned University certified courses.
- Excellent public and private research institutions.
- Strong support network.

A DIVERSE ECONOMY
- 9th most industrialized region in France (as a % of GDP).
- Global market leaders.
- A strong network of SMB and SMIs.
- Businesses in expanding markets.

the Auvergne Advantage
A high speed regional network hub

The first French region to be 100% covered by broadband internet, since 2009. Auvergne continues its digital revolution.

In 2011 Auvergne became the testing ground for the deployment of high speed internet. Ongoing development across all of Auvergne with main target: High Speed Internet in 100% of households by 2017.

**RAIL LINKS**

- 1,225 km of railway tracks.
- Clermont-Ferrand to Paris:
  - 8 departures daily - Fastest journey time: 2h59mins *(Source: SNCF - 2014).*
- **Freight traffic:** 1.4 million tons *(Source: SNCF - 2013).*

**ROAD LINKS**

- 374 km of highway:
  - A71: Clermont-Ferrand - Bourges (190 km) - Paris (via the A10),
  - A75: Clermont-Ferrand - Béziers (350 km) - Spain (via the A9),
  - A89: Bordeaux - Clermont-Fd - Lyon (600 km) - connections to the A20 and the A47.
- 523 km of national roads (n-roads),
- 19,780 km of secondary roads,
- 19,190 km of minor roads.

**AIR LINKS**

- **3 Airports:**
  - Clermont-Ferrand Auvergne International Airport: 9 flights a day to Paris (1 hour duration),
  - Aurillac / Tronquières: 2 flights a day to Paris (1h20mins),
  - Le Puy / Loudes: 2 flights a day to Paris (1h15mins).

- **3 Aerodromes:**
  (for business flights):
  Montluçon / Guéret, Moulins / Montbeugny, Vichy / Charmeil.

Clermont-Ferrand Auvergne International Airport
Flights to more than 230 destinations in France and Europe. Plus connection flights to the rest of the world.
*Passenger traffic:* 416,812 (2013),
*Freight traffic:* 2,343 tons (2013),
*Postal traffic:* 1,135 tons (2013).
A diverse and dynamic economy

Auvergne houses a number of businesses leaders in the French, European and Worldwide markets, offering specialized skills and solutions for diverse sectors.

Some examples

RUBBER, PLASTIC AND COMPOSITE MATERIALS

> **Auriplast** (Cantal) : Plastic injection and electroplating specialists.
> **Barbier** (Haute-Loire) : France’s largest and Europe’s 8th largest producer of polyethylene film.
> **Britton Flexible** (Haute-Loire) : A European leader in flexible packaging.
> **Joubert** (Puy-de-Dôme) : World leader in the manufacturing of bungee cords and Easy Grip Snow Chains.
> **Michelin** (Puy-de-Dôme and Haute-Loire) : Global leader in tyre production.
> **Wavin** (Allier) : The largest European producer of PVC pipes and fittings.

CHEMICALS, PHARMACEUTICALS AND HEALTHCARE

> **Adisseo** (Allier) : Global expert in animal nutrition.
> **Laboratoires Théa** (Puy-de-Dôme) : France and Europe’s leading independent ophthalmology laboratory.
> **Laboratoires Vichy** (Allier) : One of L’Oréal’s top ten consumer brands.
> **MSD-Chibret** (Puy-de-Dôme and Haute-Loire) : Sterile production facility for ophthalmic products and antibiotics.
> **Sanofi Chimie** (Puy-de-Dôme) : One of the world leaders in the pharmaceutical industry.

METAL WORKING AND MECHANICAL ENGINEERING

> **Aubert & Duval** (Puy-de-Dôme) : A world leader in high quality steel and super-alloys.
> **Chevalier d’Auvergne** (Haute-Loire) : One of France’s prestigious manufacturers of precision blades.
> **Constellium France** (Puy-de-Dôme) : A global leader in innovative aluminum production.
> **Peugeot Citroën** (Allier) : Specialists in Cast iron components for the automotive industry.
> **Wichard** (Puy-de-Dôme) : One of the World leaders in marine hardware and precision forging.
AGRI-FOODS SECTOR
> Delbard (Allier): One of the world leaders in the horticulture sector (especially roses and fruit trees).
> Eaux de Volvic (Puy-de-Dôme): A mineral water brand sold all over the world.
> Limagrain (Puy-de-Dôme): Largest European and 4th largest worldwide seed producer.

ELECTRICITY AND ELECTRONICS
> Ansaldo STS (Puy-de-Dôme): World leader in railway signaling.
> Bosch (Allier): Leader in ABS, ASR and ESP braking systems.
> Eaton (Puy-de-Dôme): Specialist in security lighting.
> NSE (Puy-de-Dôme et Allier): Specialists in cabling and aerospace tooling.
> Omerin (Puy-de-Dôme): European leader in high temperature wires and cables.
> SAGEM (Allier): The largest European and 3rd largest worldwide producer of inertial navigation systems.
> Valeo (Puy-de-Dôme and Haute-Loire): World leader in wiper and automotive powertrain systems.

BUILDINGS AND CONSTRUCTION
> Matière (Cantal): Specialist in structures of reinforced concrete and metal.
> MS (Puy-de-Dôme): Leader in slurry treatment plants.
Internationally renowned corporations, dynamic small businesses, expanding urban and rural industrial centres, sophisticated and cutting edge companies in Auvergne are experts in their field.

Almost 50,000 firms (listed in Chamber of commerce registry), across all sectors are proof of their competence.
Auvergne = Innovative region
Network supporting Innovation

3 Highly Competitive Business Clusters

ViaMéca (mechanics, aeronautics and the automotive industry)
Céréales Vallée (cereal and seed Innovation)
Elastopôle (rubber and polymers)

8 Clusters of Excellence

E2IA (Eco-companies for innovation in Auvergne)
JCEP (Young economic chamber of the plastics industry)
Analgesia Partnership (R&D in treatments against pain)
Institut de Recherche Pharmabiotique (R&D in the field of pro-biotics)
Nutravita (food, nutrition and health sectors)
InnovaTherm (hydrotherapy and health sector)
Efficience Industrielle (industrial metrology)
Gabi (wood and building works)

Business Groups

TIC Auvergne (Information and communication)
Automac (automotives)
AVIA (aeronautics)
MEMO Mecatronique
ES3 (extrusion)
Le Damier (music)
Etc.
Auvergne possesses a full complement of tools to facilitate innovation and the transfer of technology for entrepreneurs, business groups and start-ups:

- Technological Resources (Clermont University and public institutions specializing in science and technology),
- Financial Resources (JEREMIE and AT2I+ funds),
- Business Advice (CCI Auvergne, INPI, GIP Gitta, Incubateur BUSI…).

In addition, Auvergne houses team that is unique within France; La Maison Innovergne working to simplify and streamline business projects from creation onwards.

SATT Grand Centre (Society for Accelerating Technology Transfers), covering 4 regions (Auvergne, Centre, Limousin, and Poitou-Charentes), has its headquarters in Auvergne. SATT is an important part of the resources available for innovation and it provides the liaison between public laboratories and the socio-economic world.
2 UNIVERSITIES: Blaise Pascal & Université d’Auvergne (merging together in 2015).

2 IUT (COLLEGE OF ART AND TECHNOLOGY): Auvergne & Allier.

6 ENGINEERING SCHOOLS

- AgroParisTech - ENGREF
  (National School of Rural Management, Water and Forestry)
- ENSCCF
  (Clermont-Ferrand Higher National School of Chemistry)
- IFMA
  (French Institute for Advanced Mechanical Engineering)
- ISIMA
  (Higher Institute of Computing, Modeling and their Applications)
- Polytech’Clermont
  (Institute of Engineering Science)
- VetAgroSup - ENITA
  (National School of Engineers in Agricultural Techniques)

SPECIALIZED SCHOOLS

- ENSACF
  (Clermont-Ferrand Higher National School of Architecture)
- ESC Clermont
  (Clermont-Ferrand Graduate School of Management)
- ESEAPAC
  (European High School of Packaging)
- IFAG
  (Institute for Business and Management Training)
- CAVILAM
  (Audiovisual Centre for Modern Languages)
- ENILV
  (National School for Meat and Dairy Industry)
- IEQT
  (European Total Quality Management Institute)
- IRISup’
  (Higher Education Apprenticeship Institute)

Medical schools and courses for Paramedical professions
(such as midwives, physiotherapists, nurses and healthcare managers).

46,000 students!
A variety of facilities, all to encourage research in Auvergne

The same region where the “Pascaline”, the world’s first calculator was invented in the 17th century, has remained home to many excellent centres of research such as CLARA, a cancer research institute working in Auvergne and Rhone-Alpes region.

Auvergne has over 120 private and public research laboratories employing 7,000 people, including 3,000 researchers. This is a large number of resources for research considering the size of the region. The importance of research and development is further illustrated by the relatively high % of GDP (5th nationally) invested in it.

Publicly funded research is carried out at the two universities and specialized centres such as CNRS (National Centre for Scientific Research), INRA (National Centre for Agronomic Research), INSERM (National Institute of Health and Medical Research), IRSTEA (National Institute of Science and Technology Research for the Environment and Agriculture), CICE (International Centre for Endoscopic Surgery) and Laboratoire des Ponts et Chaussées (Civil Engineering Laboratory).

Privately funded research is carried out by major companies (Michelin, Alcan, Limagrain, etc…) as well as small businesses. This helps boost the quality and competitiveness of the research sector in Auvergne.
Environment built to enhance initiative and economic development
HIGHLY SKILLED LABOUR FORCE
> An important well trained labour force less expensive than the national average,
> **Unemployment Rate: 8.9%** (9.9% National Unemployment Rate for the 3rd Quarter of 2014),
> **Low turnover rate.**

TECHNICAL AND FINANCIAL SUPPORT

Of 8,137 businesses created in Auvergne in 2014, 50% were independent traders (known as “auto-entrepreneur”). These entrepreneurs benefit from support from organizations such as the CCI (with specialized network to help start-ups in France), Club de Créateurs (an Entrepreneurs club), business incubators and a Company Transfer Network.

There are various forms of support for entrepreneurs establishing, creating or expanding a business. Most of the region is eligible for government, European or local authority grants. Auvergne has pioneered the implementation of the Joint European Resources for Micro to Medium Enterprises JEREMIE, co-financed by the European Union (ERDF: European Regional Development Fund) and the Regional Government whilst managed by the CCI Auvergne and Sofimac Partners. JEREMIE gives businesses the opportunity to obtain equity, loans or guarantees. There is also an association of Business Angels and the recently created K-Auvergne (increasing company share capital), which is the latest in services put in place to help Auvergne’s businesses.

A VARIETY OF SERVICES FOR BUSINESSES

> **Auvergne has many industrial zones that are tailor-made to answer the needs of business leaders.** These industrial zones are located in areas of employment that have been geared towards certain domains and are either business parks or Technopolis. Technopolis are reserved for highly specialized or dominant sectors promoting synergies between businesses located within.

> **A broad range of business services**
Covering a wide range of activities in consultancy, industrial engineering, management, communication, design and IT.

> **Modern Conference Facilities**
Each departement boasts well-equipped conference centres receiving several thousand participants for conferences, trade fairs, concerts and shows.
A privileged environment for personal and professional experience
10 SPA RESORTS

50,000 Spa-goers visit each year these resorts for water therapy or a rejuvenating break. The spas deal with a multitude of conditions (rheumatology, pulmonary disorders, dermatology, neurology, digestive disorders and cardiovascular pathologies). Auvergne: A top European centre for health and aquafitness.

CULTURAL EVENTS

Auvergne hosts a wide range of cultural events all year round. These include Cinema (Clermont-Ferrand International Short Film Festival), Classical music (La Chaise Dieu Festival), contemporary music (Europavox at Clermont-Ferrand, Rock Music with La Coopé, Le Zénith), folklore (Les cultures du Monde in Gannat), history (Renaissance festival Le Roi L’Oiseau in Puy-en-Velay), theatre (La Comédie at Clermont-Ferrand National Stage, Théâtre de rue in Aurillac) and Design Cutlery Show (Coutellia in Thiers).

These events, taking place across the region and growing in reputation each year, transcend borders and reflect the rich culture of the region.

ECOTOURISM

Auvergne has a number of exceptional sites of natural beauty combined with a rich cultural, historical and architectural heritage; for example the Chaîne des Puys mountain range (80 volcanoes including the Puy de Dôme which is accredited as a “Grand Site de France” and since 2014 a candidate to become one of UNESCO’s World Heritage Sites); A mountain sightseeing train (called Panoramique des Dômes), the regional natural park of Auvergne Volcanoes and Livradois-Forez, Vulcania (also known as the European Park of Volcanism, an educational amusement park and a museum), Le Pal (amusement and zoologic park), Tronçais forest, Auvergne Castle trail, a tour of Romanesque churches, Haut-Allier Gorge and the National Centre of Costume and Stage Design.

SPORTING ACTIVITIES

Auvergne offers a plethora of outdoor activity including: air sports, water sports taking place on natural lakes, rivers and reservoirs (rowing, canoeing / kayaking, fishing, rafting, water skiing and sailing), hiking, horse riding, mountain biking, alpine and Nordic skiing, mountain climbing and golf...). All these activities are available and easily attainable in Auvergne! Without forgetting great rugby (ASM Clermont Auvergne), pole vaulting (with the world champion Renaud Lavillenie) and sporting events (like the Trophée Andros Rally on snow and ice).

GASTRONOMY

13 Michelin star-rated chefs, 5 CDO* Cheeses (Cantal, Salers, Saint-Nectaire, Bleu d’Auvergne, Fourme d’Ambert), traditional cuisine (stews, soups, coq au vin, Aligot (melted cheese specialty), salted pork and lentils) and also, cured meats, AOC green lentils from Le Puy, AOC Fin Gras du Mézenc beef, duck foie gras, wines, confectioneries, gentian-based liqueurs and aperitifs, renowned sparkling mineral waters and many other products labeled “Bravo L’Auvergne”. (*CDO = Controlled Designation of Origin).
5th nationally in its percentage of GDP that is spent on R&HD

1st nationally in the production of mineral water

8th nationally for external commerce

7th nationally in industrial employment rate

2nd nationally for land dedicated to regional natural parks

4th nationally for the lowest rate of unemployment

15 FACTS THAT CHALLENGE PRECONCEPTIONS ABOUT THE AUVERGNE!

More egalitarian
More natural
More ambitious
More creative
More visionary
Life is better in Auvergne!

2nd nationally in its production of CDO Cheeses

8th nationally for the generation of renewable energy

1st nationally for its access to broadband internet

1st nationally for its 5 year business survival rate

9th nationally for the number of graduates in its young (25-34) work force

5th nationally for the percentage tourism contributes to GDP

5th nationally for the total amount of annual sunshine

9th nationally for its water therapies

1st région nationally in all indicators for a good quality of life!

Source: CCI Auvergne Auvergne Nouveau Monde
49,845  Business Establishments* employing 279,744 persons*  (Chamber of Commerce Registry)

- BETWEEN 2005 AND 2014* (excluding the energy sector)
- +9% Business Establishments
- +2% Employed

- BETWEEN 2013 AND 2014* (excluding the energy sector)
- +0,5% Business Establishments
- -0,5% Employed

96% of business establishments have less than 20 employees. 1% of business establishments have more than 50 employees. 5.6 employees per business establishment on average.

Evolution (2005-2014*) of business establishments by sector (starting at 100 in 2005)

Evolution (2005-2014*) in number of employees by sector (starting at 100 in 2005)

Source: CCI Auvergne - ARVICS ECO - * Data at 30-09-2014
Business establishments and employment by département 2014*

Breakdown of business establishments by département

- Allier: 22,827 (46%)
- Haute-Loire: 11,884 (24%)
- Cantal: 8,675 (17%)
- Puy-de-Dôme: 6,459 (13%)

Breakdown of the number of employees by département

- Allier: 146,758 (53%)
- Haute-Loire: 65,597 (23%)
- Cantal: 26,140 (9%)
- Puy-de-Dôme: 41,249 (15%)

Source: CCI Auvergne - ARVICS ECO - * Data at 30-09-2014
Employment in Auvergne in 2014*
by département and sector

Breakdown of the number of employees by their sector of employment (in total employment)

Breakdown of the number of employed by département (in total employment)

Source: CCI Auvergne - ARVICS ECO - * Data at 30-09-2014
International
the statistics
2014

More than 100 foreign businesses operating in Auvergne

1,000 regular exporters

Value of exports: 6,782 million €
= 18th nationally

Auvergne = 1,6% of French Exports

More market diversity than the rest of France:
57% of exports are inter-EU (France overall: 60%)
A strong market presence in America and Africa

DESTINATIONS OF EXPORTS:

<table>
<thead>
<tr>
<th>in % of total exports</th>
<th>France</th>
<th>Auvergne</th>
</tr>
</thead>
<tbody>
<tr>
<td>Africa</td>
<td>6%</td>
<td>12%</td>
</tr>
<tr>
<td>America</td>
<td>10%</td>
<td>14%</td>
</tr>
<tr>
<td>Near and Middle East</td>
<td>3%</td>
<td>1,5%</td>
</tr>
<tr>
<td>Asia</td>
<td>13%</td>
<td>10%</td>
</tr>
</tbody>
</table>

Source: CCI Auvergne
Observatoire Régional de l’International - Customs Statistics February 2015
Presence on international markets

TRADE EXCHANGE IN 2014 AND 2013 BY DEPARTEMENT
(in millions of Euros and as a % of the total for Auvergne)

**Exports**: 6,782 M€ (-3%/2013)
**Imports**: 6,736 M€ (+3%)
**Surplus**: 44 M€ (-90%)

**2014**
- **Allier**: Exports 4,136 M€ (61%), Imports 1,522 M€ (22%)
- **Puy-de-Dôme**: Exports 4,517 M€ (64%), Imports 1,114 M€ (16%)
- **Cantal**: Exports 179 M€ (3%), Imports 185 M€ (3%)
- **Haute-Loire**: Exports 945 M€ (14%), Imports 921 M€ (14%)

**2013**
- **Allier**: Exports 4,440 M€ (64%), Imports 1,455 M€ (21%)
- **Puy-de-Dôme**: Exports 4,406 M€ (67%), Imports 1,018 M€ (16%)
- **Cantal**: Exports 164 M€ (2%), Imports 177 M€ (3%)
- **Haute-Loire**: Exports 916 M€ (13%), Imports 943 M€ (14%)

**Source**: CCI Auvergne
Observatoire Régional de l'International
Customs Statistics February 2015
Auvergne’s main exports (2014)

TOP 5 PRODUCTS EXPORTED

- **n°1** Pharmaceutical products (24% of regional exports)
- **n°2** Rubber products (12% of regional exports)
- **n°3** Basic chemical products, nitrogen compounds, plastics and synthetic rubber (9% of regional exports)
- **n°4** Perfumes, cosmetics and household products (6% of regional exports)
- **n°5** Non-ferrous metal (5% of regional exports)

Source: CCI Auvergne
Observatoire Régional de l’International Customs Statistics February 2015
Auvergne’s main imports (2014)

TOP 5 PRODUCTS IMPORTED

1. Pharmaceutical products (32% of regional imports)
2. Basic chemical products, nitrogen compounds, plastics and synthetic rubber (10% of regional imports)
3. Rubber products (6% of regional imports)
4. Non-ferrous metal (5% of regional imports)
5. Electrical equipment (4% of regional imports)

Source: CCI Auvergne
Observatoire Régional de l'International - Customs Statistics February 2015
Major trading partners in 2014

**Auvergne’s Top 5 Export Partners**
(in % of regional or French exports)

- **Germany** 12%
  (France’s top export trading partner 17%)
- **Spain** 10%
  (France’s 4th export trading partner 7%)
- **United States** 9%
  (France’s 6th export trading partner 6%)
- **Italy** 8%
  (France’s 3rd export trading partner 7%)
- **United Kingdom** 6%
  (France’s 5th export trading partner 7%)

**Auvergne’s Top 5 Import Partners**
(in % of regional or French imports)

- **Germany** 18%
  (France’s top import trading partner 17%)
- **United States** 13%
  (France’s 5th import trading partner 6%)
- **Italy** 9%
  (France’s 4th import trading partner 7%)
- **Spain** 8%
  (France’s 6th import partner 6%)
- **Chine** 5%
  (France’s 2nd import partner 9%)

**Since 2011, China is amongst the top 10 export destinations**

**Source**: CCI Auvergne
Observatoire Régional de l’International - Customs Statistics February 2015
Auvergne's Top 5 Export Partners (in % of regional or French exports)