

Normandy in figures and maps

Economic overview
2015



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Editorial

We are pleased to present the newest edition of the Normandy Economic Overview, offering a summarised and shared vision of the regional economy.

The aim of this document is to present Normandy as part of the new French landscape, which will have 13 new regions following the territorial reform. A spotlight is placed on the Normandy economy, using a selection of figures displayed as graphs and maps to highlight its specific characteristics and strong points. As well as being a young and dynamic region, it has many geographical and financial assets which are vital for highlighting its image and attractiveness.

This document is an essential tool for Normandy elected officials and economic players when making decisions, and it will provide any necessary clarifications as part of the development of major regional projects.

We hope you enjoy reading it.



Pierre-Henry MACCIONI

Merger prefect of the Normandy region
Prefect of the Upper Normandy region.
Prefect of Seine-Maritime.



Jean Pierre DÉSORMEAUX

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Nicolas MAYER-ROSSIGNOL

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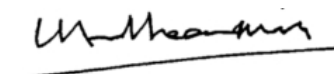
Jean CHARBONNIAUD

Prefect of the
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Lower Normandy region.

Territorial reform

Administrative France on 1st January 2016

Source: Interior Ministry. Produced by: CCI Normandie



A significant territorial reform will transform the territorial architecture of France for decades to come. At stake: a reduction in public expenses and better understanding of citizens' needs.

The first stage was started in January 2014 with the introduction of a law called **"the modernisation of public urban planning and city consolidation"**. The creation of a new status for these cities has required clarification on the use of powers at a local level.

A second stage reduces the **number of metropolitan regions from 22 to 13**. 7 merger prefects (for the 7 future merged regions), named by the Prime minister, who are in charge of developing and coordinating the regional organisation project.

A third stage, the NOTRe law (New French Territorial Organisation) aims to clarify the **powers of different territorial levels**.




Source: French Government



Transport infrastructures (2015)

Sources: Dreal (Regional Directorate for Environment, Development and Housing) Upper Normandy;
Dreal Lower Normandy. Produced by: CCI Normandie



- ROUEN** Region prefecture
- ALENÇON** Department prefecture
- BAYEUX** Subprefecture
-  Major Maritime Port
-  Trading port
-  Airport



The regional economy in brief

Located between the busiest sea in the world and the Ile-de-France region, Normandy has many economic, cultural and geographic assets, placing it at the heart of the French and European economies.

A region at the heart of the Seine Valley

The natural point of access to the sea for the French capital, Normandy has a highly developed infrastructure network and a 600km coastline, placing the region at the heart of the Paris Seine Normandie® project territory, a high-potential territory for international competitiveness.

Normandy is organised around a territorial network including a city, eleven agglomerations and smaller clusters which help balance the territory.

As France's primary port region, Normandy has a dynamic and well-equipped coastline, placing it amongst the top French regions due to its numerous activities: freight, mainly from the ports of La Havre and Rouen (combined within the HAROPA group), fishing, particularly shellfish farming in the English Channel, yachting, boating, cross-channel travel and cruises to all Normandy ports, from Tréport to Granville. The Normandy coastline is also synonymous with famous tourist sites such as the Etretat cliffs and the Normandy landing beaches.

A traditional and innovative industrial region

With a young population and high-quality education, Normandy businesses have access to a workforce which is skilled in both traditional and innovative activities with high added value. As a result, Normandy is famous for different fields such as its automotive industry, oil and related products, aviation, pharmacy, agri-food, cosmetics, energy, transport and logistics. Normandy businesses can also rely on a network of 7 competitiveness clusters, 16 industries and 19 areas of excellence spread across the region which support the businesses in their project development.

Thanks to its assets and know-how, the Normandy economy innovates and positions itself as a key player in the development of large-scale projects: RME (Renewable Marine Energies) and electric cars. These projects, as well as major infrastructure projects, are outlined in State planning contracts, allowing the region to benefit from financing for years to come.

An outward-looking region

Its access to the sea and location at the heart of European dynamics have allowed the Normandy region to develop trade with international markets. With 35% of its GDP generated from export, Normandy is ranked 2nd amongst French regions and has a diverse client portfolio allowing it to export products from its excellent industries all over the world: oil, pharmaceutical, chemical, agricultural and agri-food products.

A tourist region with a rich and diverse heritage

With a highly diverse landscape and an attractive tourism offering, Normandy highlights its cultural and historic heritage to attract tourists from across the world. 2014 is an excellent example of this, with the 70th anniversary of the Normandy landings, the World Equestrian Games and also the Canoe Polo World Championships. 417 listed sites, 2 UNESCO world heritage sites (Mont Saint-Michel and the city of Le Havre, rebuilt by Auguste Perret) and the Bayeux Tapestry, listed in the UNESCO "Memory of the World" register, are also an excellent example of Normandy historic heritage, reinforcing the region's reputation.



Key figures



Territory > Normandy Region

A wide range of landscapes, high-performance infrastructures and significant sea access are some of the assets which make the Normandy region a dynamic region at the heart of the Paris-Seine-Normandie® project.

29,907 km², 5.5% of the national territory
600km of coastline

5 departments (Calvados, Eure, Manche, Orne, Seine-Maritime)

3,221 towns, including 85% rural towns

1 city, 2 urban communities, 9 agglomeration communities,
150 commune communities

4 regional natural parks

Boucles de la Seine Normande (Upper Normandy)
Marais du Cotentin et du Bessin (Lower Normandy)
Normandie-Maine (Lower Normandy and Pays de la Loire)
Perche (Lower Normandy and Centre)

417 listed sites, 14.3% of French listed sites (01.01.2015)

34 territorial coherence schemes (SCoT) (01.01.2015)
18 approved, 5 under review and 11 under development

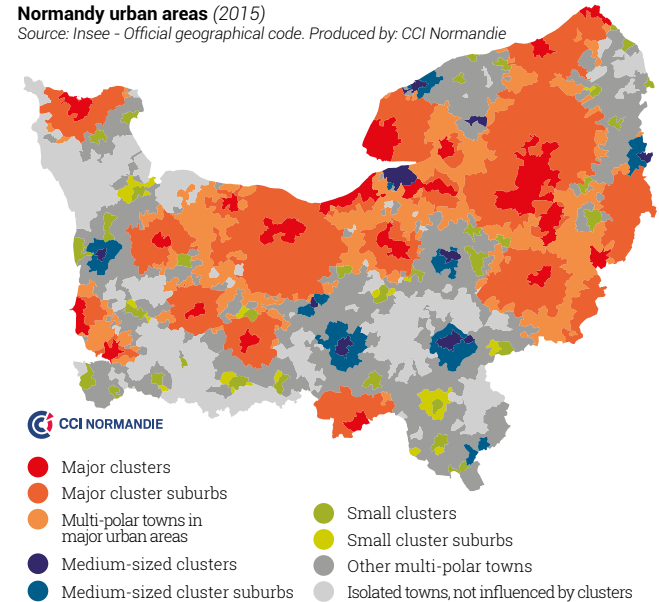
Sources: Insee - Official geographical code, Population census; French Federation of regional natural parks; MEDDE; National SCOT Federation

Basilica of Notre-Dame d'Alençon



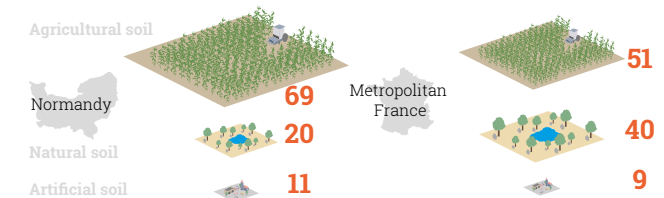
Normandy urban areas (2015)

Source: Insee - Official geographical code. Produced by: CCI Normandie



Land use (as %, 2014)

Source: Agreste - Teruti-Lucas. Produced by: CCI Normandie



Territory > Normandy Region

Intercommunality in Normandy (01.01.2015)

1. Urban community of Cherbourg

5 towns 68.5 km²
81,103 inhab. 1,183.3 inhab./km²
Average annual population change since 2007: - 1.0%

2. Agglomeration community of Caen la Mer

35 towns 222.3 km²
236,605 inhab. 1,064.4 inhab./km²
Average annual population change since 2007: 0.0%

3. Agglomeration community of St-Lô Agglomération

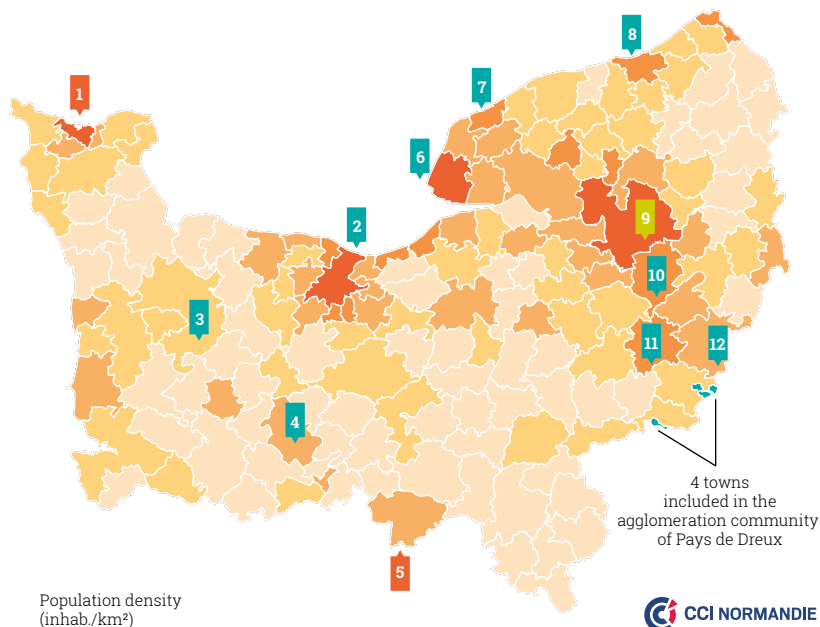
73 towns 689.5 km²
67,128 inhab. 97.4 inhab./km²
Average annual population change since 2007: 0.5%

4. Agglomeration community of Pays de Flers

25 towns 272 km²
35,940 inhab. 132.1 inhab./km²
Average annual population change since 2007: - 0.3%

5. Urban community of Alençon

36 towns(*) 375 km²
54,278 inhab. 144.7 inhab./km²
Average annual population change since 2007: - 0.4%



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6. Agglomeration community of Le Havre

17 towns 190.7 km²
236,997 inhab. 1,243.1 inhab./km²
Average annual population change since 2007: - 0.5%

7. Agglomeration community of Fécamp Caux Littoral Agglo.

13 towns 86.1 km²
28,656 inhab. 333 inhab./km²
Average annual population change since 2007: +0.1%

8. Agglomeration community of Dieppe Maritime

16 towns 129 km²
48,821 inhab. 378.5 inhab./km²
Average annual population change since 2007: - 1.0%

9. Métropole Rouen Normandie

71 towns 663.8 km²
488,630 inhab. 736.1 inhab./km²
Average annual population change since 2007: +0.1%

12. Agglomeration community of Portes de l'Eure

41 towns 312.2 km²
57,223 inhab. 183.3 inhab./km²
Average annual population change since 2007: - 0.2%

11. Agglomeration community of Grand Évreux Agglo.

37 towns 292 km²
81,168 inhab. 278 inhab./km²
Average annual population change since 2007: - 0.1%

10. Agglomeration community of Seine-Eure

37 towns 324 km²
67,903 inhab. 209.6 inhab./km²
Average annual population change since 2007: +0.4%

(*): includes 5 towns in Sarthe

Sources: DGCL; Insee – Population census
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Territory> Project territories

Normandy Territorial Coherence Schemes (SCoT) (2015)

Source: National SCoT Federation. Produced by: CCI Normandie



- | | |
|---|---|
| 1 - Communauté de Communes Caux Vallée de Seine | 6 - Seine Eure Forêt de Bord |
| 2 - Pays du Roumois | 7 - Communauté de Communes Eure Madrie Seine |
| 3 - Pays du Neubourg | 8 - Communauté d'Agglomération des Portes de l'Eure |
| 4 - Pays de Conches | 9 - Suisse Normande - Condé - Druance |
| 5 - Scot de l'Agglomération d'Évreux | |

SCoT (Territorial coherence scheme) progress

- Scheme under review
- Scheme approved
- Scheme under development
- Commune not covered by a SCoT

(*) : Interregional SCoT

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The Seine Valley*, a major focus for sustainable development

The Seine Valley: an ecosystem which is internationally renowned for its logistical and industrial excellence, high added value and innovative economic activities as well as its position as a major tourist destination.

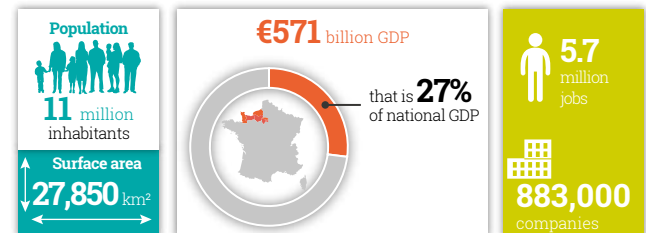
From Ile-de-France to Normandy, an unprecedented economic development project is taking shape, aiming to confirm the position of the Seine Valley as one of the main access points to the European continent, from Atlantic Europe to Rhineland Europe.

With this project, France is given the opportunity to place its capital and wealth at the heart of a economic space supported by an international standard multi-modal system, revealing a source of added value, innovation, growth and jobs for the French economy.

An interregional plan contract endowed with nearly €1 billion was concluded in 2015 to finance - from now until the end of the decade and beyond - major projects intended to reinforce the economic assets of a visible, attractive and competitive territory on both a worldwide and local level.

*Seine Valley perimeter defined by decree n° 2013 - 336 of 22 April 2013, including the following departments: Calvados, Eure, Hauts-de-Seine, Manche, Paris, Seine-Maritime, Seine-Saint-Denis, Val d'Oise, Yvelines.

Key figures for the Seine Valley*



Territory > Project territories

The Seine Valley, a major focus for sustainable development



A financially powerful territory

Major economic hubs

- Paris
- Regional hub
- Collection of major establishments
- Employees at the main establishments
- 2,000 to 5,000
- from 600 to 2,000

Linked to outstanding logistical sites

- Strategic logistical site
- Other logistics site

Internationally connected.

- Major sea and river port
- Trading port
- International airport
- National airport

A territory with major projects

Ambitious transport projects

- Grand Paris Express (GPE) for an attractive city
- New Paris-Normandie Line (LNP) for an improved passenger link
- An additional route for the European east-west corridor to increase freight...
- through electrification of the Sequences - Giron section
- Seine Métropole Port (PSM)
- Improved sea access to Rouen Port
- Connection work

and Renewable Marine Energies (RME) projects

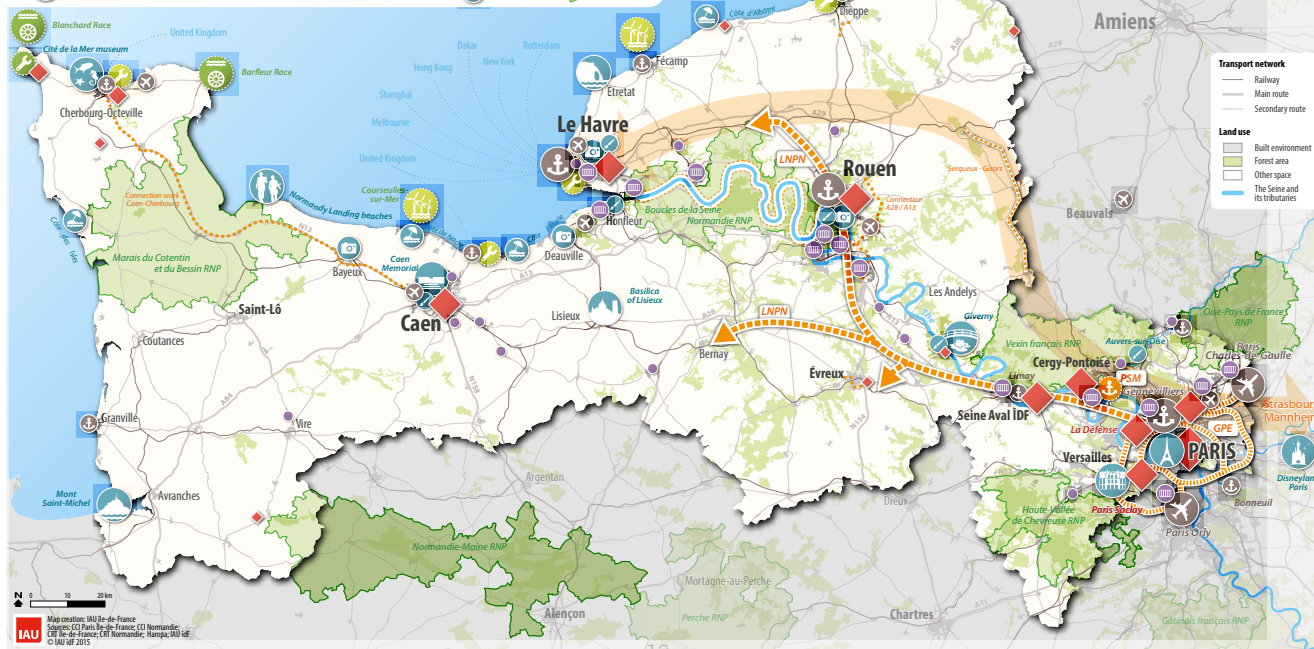
- Offshore wind farm
- Tidal turbines
- Maintenance/ manufacturing site
- Maintenance/ manufacturing site

Exceptional living standards

Internationally renowned tourist sites,

- Isenic site
- Impressionist site
- Other major site
- exceptional landscapes, an unspoilt environment
- Coastline
- Regional Natural Park

The Seine Valley in Europe



0 10 20 km

Map location: IAU Ile-de-France
Sources: CCI Paris Ile-de-France, CCI Normandie
CCI Ile-de-France, CCI Normandie, Haropa, IAU Ile-de-France
© IAU IAU 2015

Population

Normandy is the 9th most populated French region, with 3.3 million inhabitants. Its population is slightly younger than the national average and the region's ratio for teaching, sport, leisure and culture facilities is higher than the national average.

3,322,800 inhabitants (2012, valid as of 01.01.2015)

5.2% of the population of Metropolitan France, ranked 9th nationally

111 inhabitants per km²

117 inhab./km² in Metropolitan France

Ranked 6th nationally

Less population growth than the national average: +0.3% per year on average since 2007 (+0.5% for Metropolitan France)
Population growth mostly due to a natural surplus balance

More workers due to regional industrial specialisation
A higher proportion of retirees than the national average, particularly in the west of Normandy.

Source: Insee - Population census.

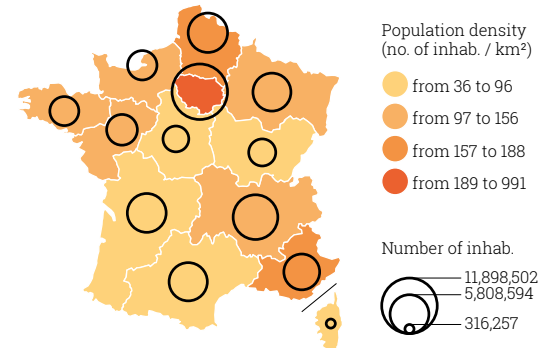
Population aged 15 or over by socio-professional category (as %, 2012)

Source: Insee - Population census. Produced by: CCI Normandie

	Normandy	Metropolitan France
Farmers	1	1
Craftsmen, traders, business leaders	3	3
Managers, professional positions	6	9
Intermediate positions	13	14
Employees	17	17
Labourers	16	13
Retirees	29	27
Other people without professional activity	15	16

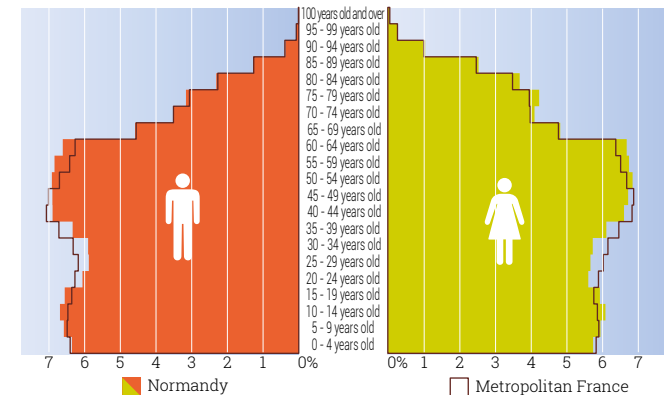
Population and population density (2012)

Source: Insee - Population census. Produced by: CCI Normandie



Age distribution (2012)

Source: Insee - Population census. Produced by: CCI Normandie



Population > Living conditions

1,732,800 dwellings

9.8% second homes and occasional dwellings
High rate in the west of Normandy: 15.3%

Private service and transport service facilities ratio lower than the national average.

13th ranked region for density of medical and paramedical positions:

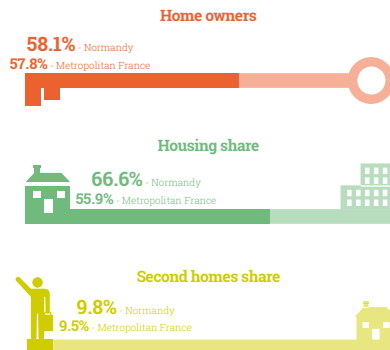
37.8 per 10,000 inhabitants (52.2 in Metropolitan France)
9 general practitioners per 10,000 inhabitants (9.8 in Metropolitan France)
8.6 specialist doctors per 10,000 inhabitants (12.9 in Metropolitan France)
20.1 auxiliary health workers* per 10,000 inhabitants (29.5 in Metropolitan France)

*including midwives, nurses, physiotherapists, speech therapists, orthoptists, podiatrists, hearing aid specialists, occupational therapists and psycho-motor therapists.

Sources: Insee – Permanent Facilities Database, Population census.

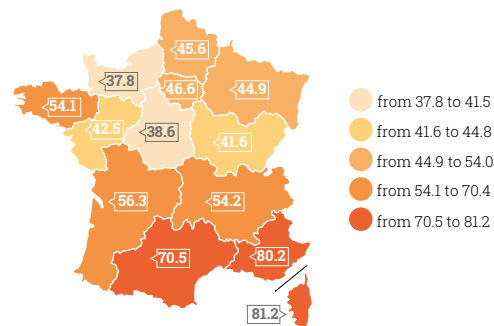
Housing stock (2012)

Source: Insee - Population census. Produced by: CCI Normandie



Density of medical and paramedical positions (per 10,000 inhab., 2014)

Sources: Insee – Permanent Facilities Database, Population census. Produced by: CCI Normandie



Service facilities ratio (per 10,000 inhab., 2014)

Sources: Insee – Permanent Facilities Database, Population census.
Produced by: CCI Normandie

	Normandy	Metropolitan France
Social work facilities	7.8	7.5
Private services facilities	141.5	171.1
Sports, leisure and culture facilities	28.4	26.4
Primary education facilities	9.0	8.1
Secondary education facilities	2.2	2.0
Health service facilities	7.9	7.9
Medical and paramedical positions	37.8	52.2
Transport services	3.6	6.1
TOTAL	238.2	281.3

(Excluding higher education, training and education service establishments; tourism facilities; trade)

Economy > Production and wealth

With a GDP of 90.5 billion euros and a GDP per capita of 27,180 euros, Normandy is characterised by the significant role of industry in the creation of regional added value, and a wealth produced per capita and average income below the national average.

GDP (Gross Domestic Product): 90.5 billion euros* (2013)

Ranked 9th nationally

4.4% of national GDP

GDP per capita: 27,180 euros* (2013)

Ranked 5th nationally

National average 32,527* euros per capita

GDP per job: 70,899 euros* (2013)

Ranked 5th nationally

National average 78,762* euros per job

GVA (Gross Value Added): 81.2 billion euros* (2013)

Ranked 9th nationally

4.4% of national GVA

Significant contribution of industrial activity to the creation of regional wealth.

20% of wealth produced by industrial companies.

14% in Metropolitan France (2013)

Median income: 1,601 euros (per consumption unit and per month, 2012)

1,649 euros in Metropolitan France

62% of taxed households (2012)

64% in Metropolitan France

13.4% of tax households below the poverty line (2012)

Ranked 6th nationally, 14.3% in Metropolitan France

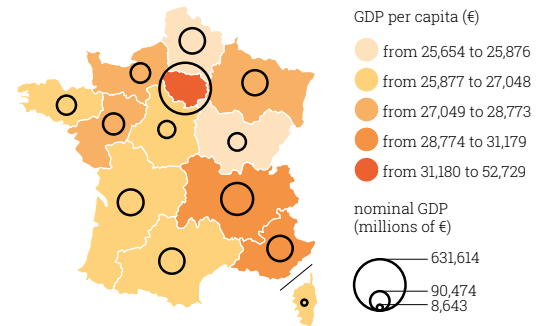
Sources: Insee – Regional accounts, Population census; DGCL; DGFIP – CNAF – CNAV – CCMSA – tax and social localised file; DGCL

*Data calculated based on 2010. Therefore it cannot be compared to the data provided in the previous editions which are calculated based on 2005.

Regional Gross Domestic Product (GDP) (2013)

Sources: Insee – Regional accounts, Population census.

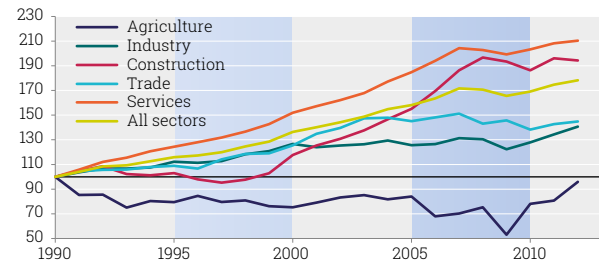
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Changes to Normandy gross added value by major business sector

(base index of 100 in 1990)

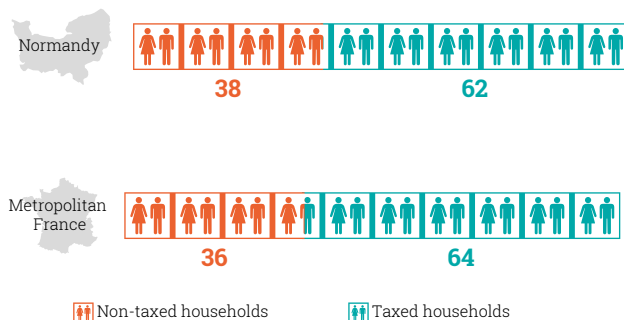
Source: Insee – Regional accounts. Produced by: CCI Normandie



Economy > Production and wealth

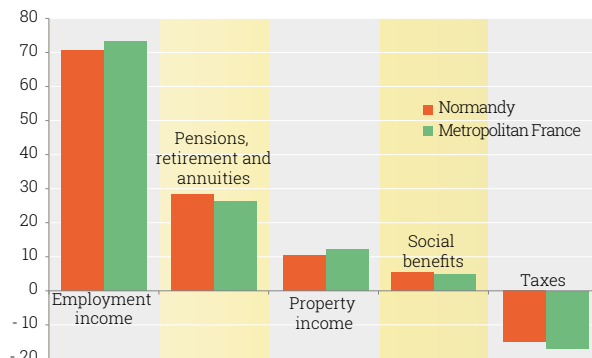
Distribution of tax households (as %, 2012)

Sources: Insee – DGFIP – CNAF – CNAV – CCMSA – social and tax localised file.
Produced by: CCI Normandie



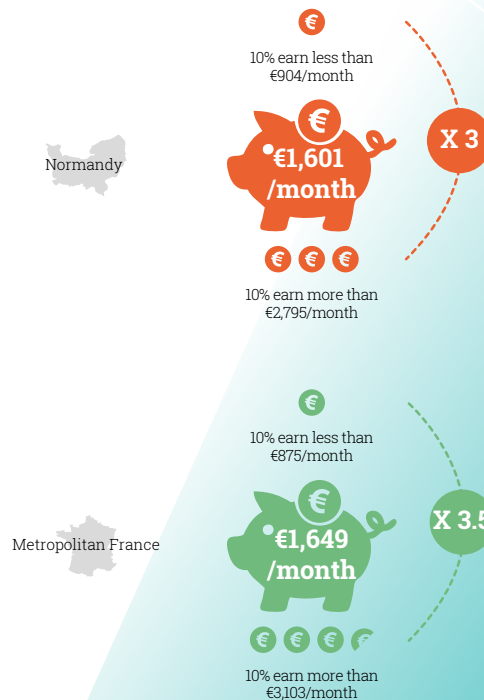
Structure of disposable income (as %, 2012)

Sources: Insee – DGFIP – CNAF – CNAV – CCMSA – social and tax localised file.
Produced by: CCI Normandie



Living standards for tax households (by consumption unit, 2012)

Sources: Insee – DGFIP – CNAF – CNAV – CCMSA – social and tax localised file.
Produced by: CCI Normandie



Economy > Employment

Still affected by the financial crisis, with a falling employment level since 2005 and an unemployment rate higher than the national average, Normandy has 1.28 million jobs, with more in agriculture, industry and construction than the national average.

1,279,400 jobs (01.01.2014)

including 1,151,300 salaried jobs (90%)
-0.1% on average per year since 2005, +0.3% in Metropolitan France
Employment and employment supervision rates lower than the national average (2012)

11% of salaried employment is part of the social economy* (2013)

94% of the Normandy working population works in Normandy.

273,700 job seekers (ABC categories, 2014)

5.2% of French job seekers
Unemployment rate: 9.3% in Lower Normandy and 10.9% in Upper Normandy (1st quarter 2015)
10% in Metropolitan France

2,264,600 declarations prior to recruitment (DPAE)** recorded in Normandy (2014)

62.3% of DPAE are carried out by temporary agencies

60,300 recruitment projects offered by companies (2015)

including 30% seasonal jobs
including 27% deemed difficult

*Social economy includes companies organised in the form of cooperatives, mutual funds, associations or foundations whose internal operation and activities are based on the principle of solidarity and social benefits.

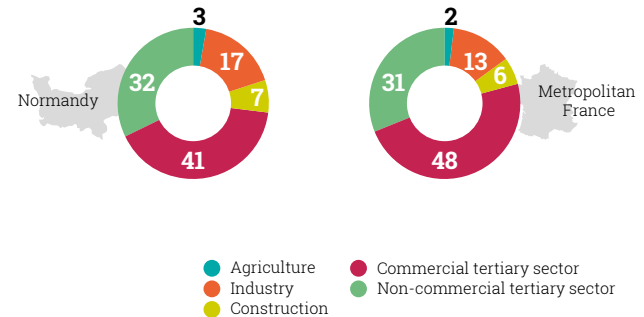
**A declaration prior to recruitment is a formality indicating intention of employment in the short-term, regardless of the duration of the job (one hour, one day, several months or undetermined).

Sources: Insee – Employment estimates, Population census, Localised unemployment rates; Dares; Employment Centre – BMO Survey, SISP – DPAE

Jobs by business sector (as %, 2014)

Source: Insee - Employment estimates.

Produced by: CCI Normandie



Employment structure (as %, 2012)

Source: Insee - Population census. Produced by: CCI Normandie

	Normandy	Metropolitan France
Activity rate*	72.2	73.0
Employment rate*	62.8	63.7
Proportion of non-salaried employment	12.0	12.8
Proportion of female workers**	47.8	47.8
Proportion of working population under 30 years old**	20.5	20.2
Proportion of working population over 55 years old**	13.7	14.0
Proportion of working population with a baccalaureate	48.9	56.6
Employment supervision rate**	20.1	22.8

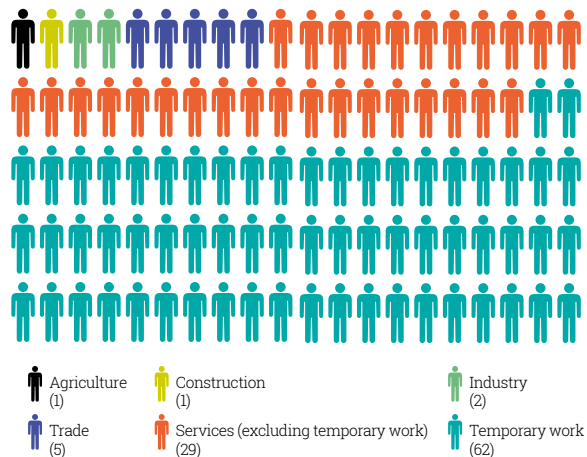
*Rate is calculated in relation to the working population (15-64 years old).

**Rate is calculated in relation to the total working population aged 15 years and over.

Economy > Employment

Declarations prior to employment in Normandy (as %, 2014)

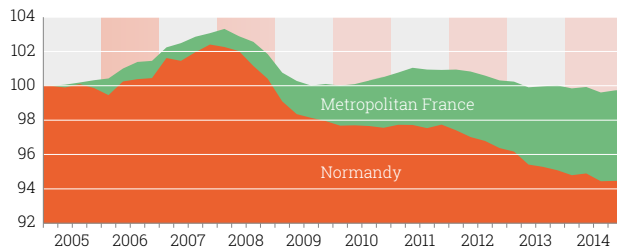
Source: Employment Centre – SISP – DPAE. Produced by: CCI Normandie



Quarterly development of commercial salaried employment

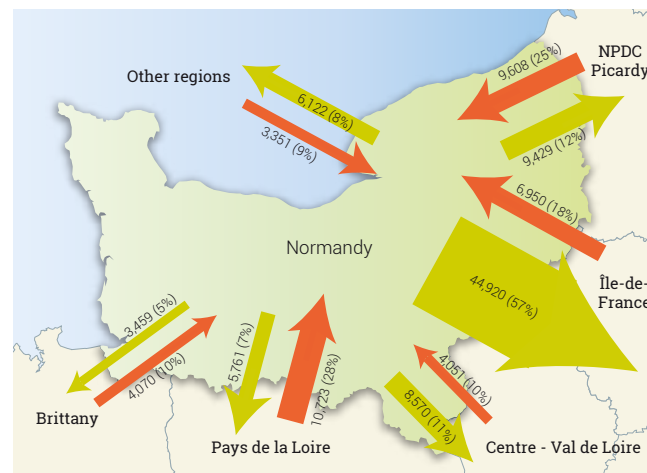
(base index of 100 in 2005)

Source: Insee - Employment estimates, CVS data Produced by: CCI Normandie



Normandy home-work commuting with other regions (2012)

Source: Insee – population census. Produced by: CCI Normandie



→ commutes entering Normandy from other regions
(total incoming flows: 38,753)

← commutes exiting Normandy towards other regions
(total outgoing flows: 78,261)

Economy > Companies

With 225,800 establishments, the Normandy economic fabric is supported by numerous corporate networks and establishments at higher numbers than the national average.

225,800 establishments (01.01.2013)

4.5% of French establishments

91.9% of head offices (2013)

96.2% in Provincial France

50,900 handicraft businesses (01.01.2013)

62% establishments without salaried employee (2013)

Larger establishments on average than national average (01.01.2013)

5.1 salaried employees on average per establishment (4.7 on average in Metropolitan France)

21,200 establishment creations (2013, non-agricultural commercial sector)

9,400 small business creations

Creation rate lower than national average

12.6% creation rate (14.1% in Metropolitan France)

2,700 company failures (2013)

+5.2% compared to 2012

4.5% of French failures

An industrial fabric supported by various corporate networks (see page 54)

7 competitiveness clusters

16 industries

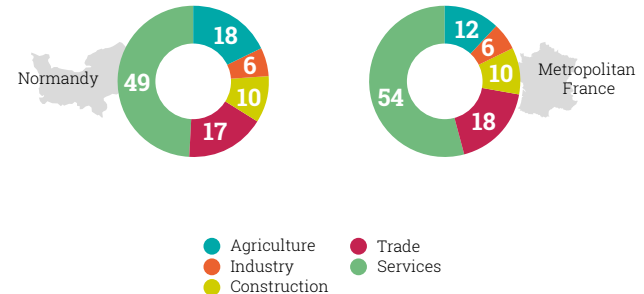
19 areas of excellence

Various territorial and themed clubs and clusters

Sources: Insee – REE Sirene, Employment estimates; Fiben – Banque de France

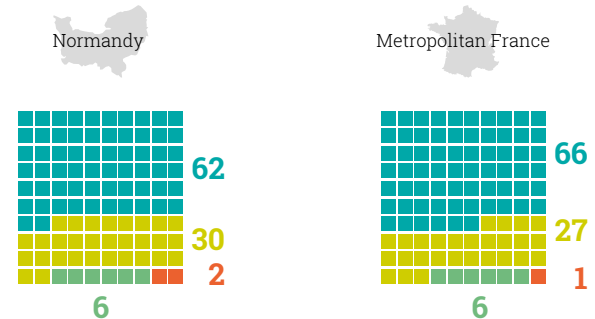
Establishments by business sector (as %, 2013)

Source: Insee – REE Sirene. Produced by: CCI Normandie



Distribution of establishments by size (as %, 2013)

Source: Insee – REE Sirene. Produced by: CCI Normandie

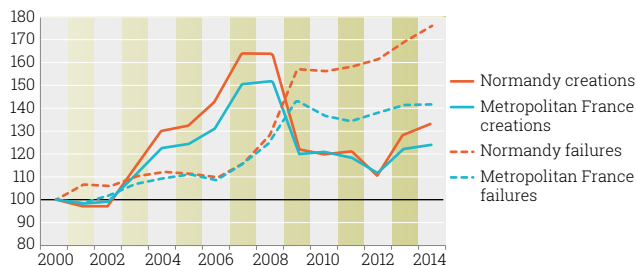


Economy > Companies

Changes to company creations and failures

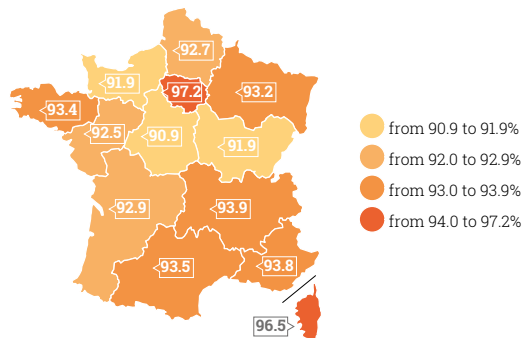
(excluding micro-entrepreneurs, base index of 100 in 2000)

Sources: Insee – REE Sirene; Fiben – Banque de France. Produced by: CCI Normandie



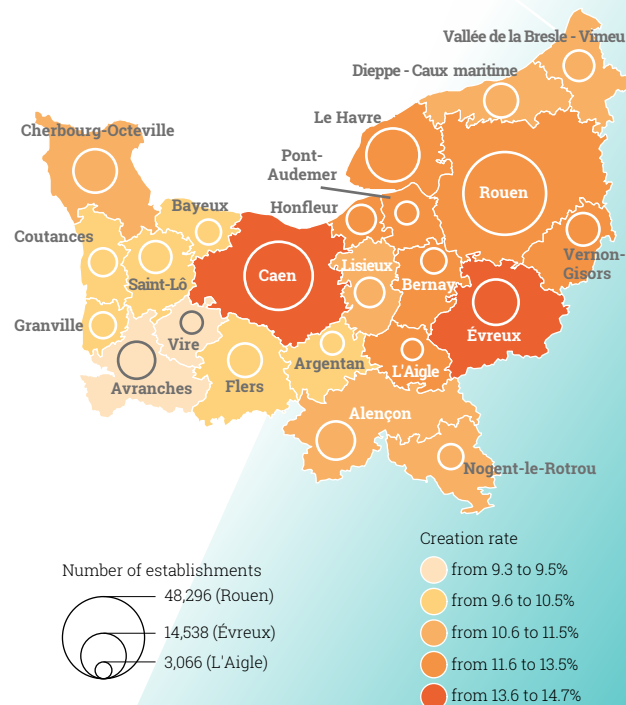
Autonomy rate* of establishments by region (2013)

Source: Insee – REE Sirene. Produced by: CCI Normandie



Establishments and creation rate by employment zone (2013)

Source: Insee – REE Sirene. Produced by: CCI Normandie



*Autonomy rate corresponds to the amount of regional establishments which have their head offices in the region out of all establishments in the region.

Economy > International

Normandy has a particularly internationally focused economy, with 35% of its GDP generated through export. Due to its specific industrial characteristics, it is renowned amongst French regions for various products such as oil, chemical or agricultural products.

6th ranked region for foreign trade: 71.5 billion euros (2014)

31.9 billion euros in export, ranked 6th nationally

39.6 billion euros in import, ranked 6th nationally

A highly internationally focused economy: 35% of GDP generated by export (2013)

Ranked 2nd nationally for trade openness, 24.2% for Provincial France

Mainly European export destinations (60.5%) but more diverse destinations than the national average

Leading region in the export of chemical, oil, pharmaceutical and agricultural products

A negative trade balance due to the high amount of hydrocarbon imports

Coverage ratio** (2014): 80.7%

Ranked 9th, 85.9% for Metropolitan France

87% of trade with Europe, 144% for Africa, 133% for America, 85% for Asia, 13% for Near and Middle East.

3,554 exporting companies *** (2014)

High number of companies with less than 10 employees: 54.6%

*Openness ratio = $(\text{exports}/\text{GDP}) \times 100$

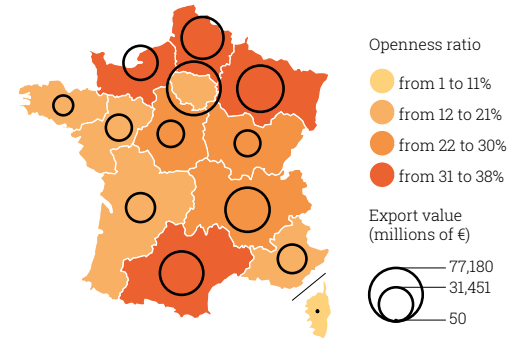
**Coverage ratio = $(\text{export value}/\text{import value}) \times 100$

***With head office in Normandy

Sources: Customs; Insee – Regional accounts.

Regional exports (2013)

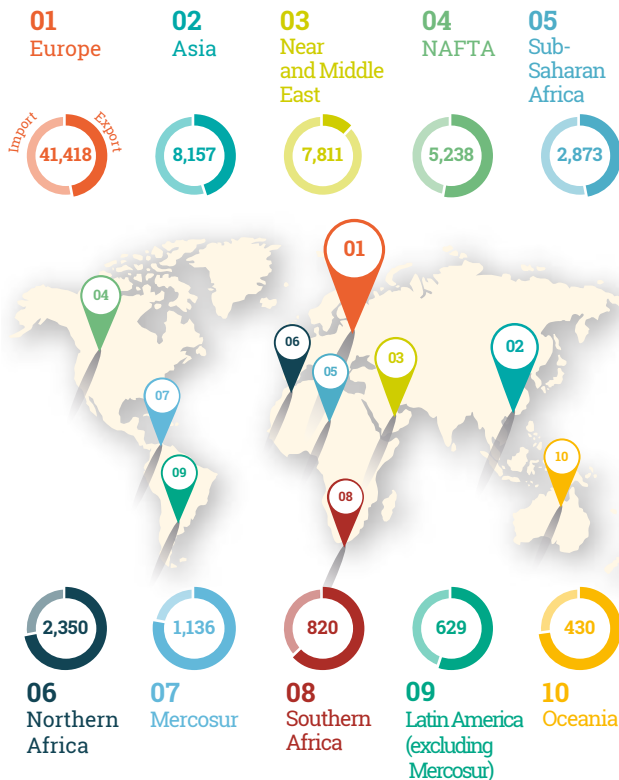
Sources: Customs; Insee – Regional accounts. Produced by: CCI Normandie



Economy > International

Trade outside of Normandy by major geographical zone

(in millions of €, 2014). Source: Customs. Produced by: CCI Normandie



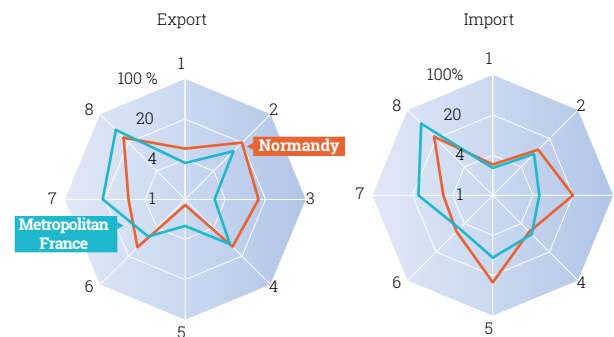
Trade outside of Normandy in Europe (2014)

Source: Customs. Produced by: CCI Normandie

	Export	Import
Euro Zone	71%	56%
EU outside of Euro Zone	22%	17%
Europe outside of the EU	7%	27%

Foreign trade structure by product (2014)

Source: Customs. Produced by: CCI Normandie



- 1 - Agricultural, forestry, fishing and aquaculture products
- 2 - Chemical, perfume and cosmetics products
- 3 - Refined oil products and coke
- 4 - Agri-food industry products
- 5 - Natural hydrocarbons, other extractive industry products, electricity, waste
- 6 - Pharmaceutical products
- 7 - Transport equipment
- 8 - Other products

Agriculture

With nearly 41,000 jobs and production of over 5 billion euros, Normandy is a leading region in various fields, with significant production diversity.

40,800 jobs (01.01.2013)

3.2% of total regional employment (2.5% in Metropolitan France)

35,400 farms (2010)

including 19,900 "large and medium-sized" farms
i.e. more than €25,000 standard gross output

1,973,700 ha of utilised agricultural area (2013)

66% of Normandy territory (49% in Metropolitan France)

Average farm surface area of 93 ha (large and medium-sized farms in 2010), 80 ha in Metropolitan France

Agricultural production of 5.2 billion euros (Average 2011/2012/2013)

7% of national agricultural production

Net business income (Average 2010/2011/2012):

31,800 euros per non-salaried worker

33,600 euros in Metropolitan France

Multi-purpose agriculture geared towards livestock (7 out of 10 farms) but with a diverse range of crops

Top ranked region for the production of cow's milk cheeses

Top ranked region for the production of butter and cream

Top ranked region for the production of fibre flax

Top ranked region for the production of cider apples and cider products

Top ranked region for number of horses

More than 600km of coastline with a major shellfish farming area

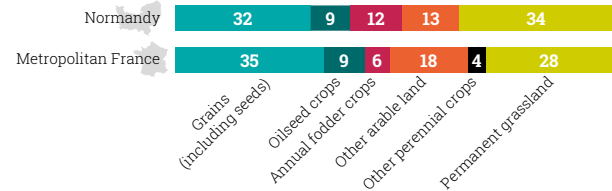
Various non-food markets (textile fibre, oil, diester, ethanol...)

Sources: Normandy Regional Chamber of Agriculture; Agreste - Agricultural census;
Insee - Employment estimates.

Utilised agricultural area (as %, 2013)

Source: Agreste - SAA 2013.

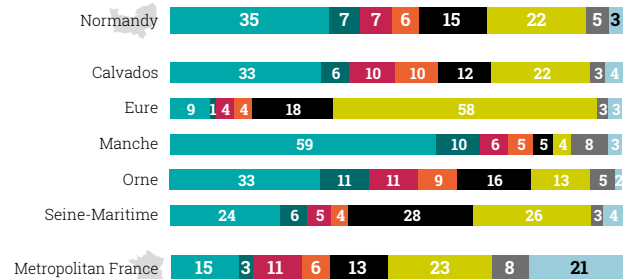
Produced by: CCI Normandie; Normandy Regional Chamber of Agriculture



Farms by type (as %, 2010)

Source: Agreste - Agricultural census 2010, Large and medium-sized farms.

Produced by: CCI Normandie; Normandy Regional Chamber of Agriculture



- Dairy cattle
- Dairy and beef cattle (mixed)
- Beef cattle
- Other herbivores
- Multicrop-livestock
- Dominant crops
- Granivores (with or without crops)
- Horticulture, fruit, vegetables and other

Agriculture

Livestock (2013)

Source: Agreste - SAA 2013.

Produced by: CCI Normandie; Normandy Regional Chamber of Agriculture

Numbers present (headcount)	Normandy	Metropolitan France	Normandy/Metro. France ranking
Cows	2,211,648	18,989,159	4th
Dairy cows	575,588	3,693,627	2 nd
Suckler cows	241,412	4,061,958	7 th
Other cattle	1,394,648	11,233,574	3 rd
Sheep	173,339	7,224,256	7th
Pigs	703,100	13,387,554	4th
Broilers	5,503,000	153,751,000	6th
Horses (at farms)	84,629	437,215	1st



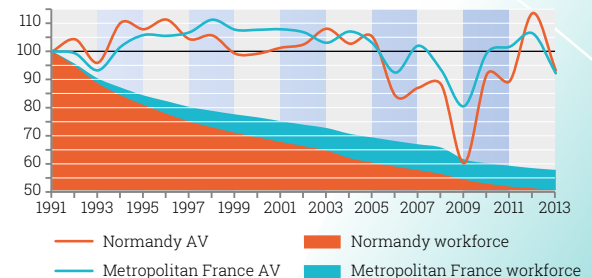
*Livestock unit (LU) is a reference unit allowing the aggregation and comparison of livestock of different species and ages by using coefficients. The standard unit used to calculate the number of livestock units (= 1LU) is the equivalent pasture for a dairy cow producing 3,000kg of milk per year, without any concentrated nutritional supplement.



Comparison of changes to gross added value and agricultural workforce (FTE)(base index of 100 in 1991)

Source: Agreste - Agricultural accounts.

Produced by: CCI Normandie; Normandy Regional Chamber of Agriculture



Farm annual accounts (average 2011-2012-2013)

Source: Agreste - Regional agricultural accounts.

Produced by: CCI Normandie; Normandy Regional Chamber of Agriculture

	Normandy	Metropolitan France	Normandy/Metro. France ranking
Production (excluding aid) (in millions of €)	5,254	72,897	8th
including vegetable products	2,398	42,427	9 th
including animal products	2,445	26,295	5 th
including service activities	412	4,175	4 th
Added value (in millions of €)	1,753	27,673	9th
as % of production	33%	38%	10 th
Direct aid (in millions of €)	664	9,211	9th
Net company income (in millions of €)	659	12,817	11th
Net company income per family workforce unit (in €) *	31,843	33,633	10th

*FADN (Farm Accountancy Data Network) average 2010-2011-2012

Industry

With a developed industrial fabric and 209,000 jobs, Normandy benefits from various skills allowing it to stand out in different industries, whether traditional, niche or high added value.

209,000 jobs (01.01.2014)

- 16.3% of regional employment: Ranked 3rd nationally
- 12.5% in Metropolitan France
- A continuous decline in employment since 2000: - 22.4%
- 21.1% in Metropolitan France

13,800 establishments (01.01.2013)

- 6.1% of Normandy establishments (6.1% in Metropolitan France)
- 13% of establishments and 43.5% of industrial Normandy employees which depend on a head office outside of the region (2013)

16.1 billion euros of added value* (2013)

- 6.2% of national industrial added value
- 19.8% of regional added value, 14% in Metropolitan France

A leading industrial region, the strongest link for development in the Seine area

A specialisation in Normandy industrial employment, focusing on agri-food, energy, pharmacy, chemistry, automotive, ship and aviation manufacturing and the glass industry.

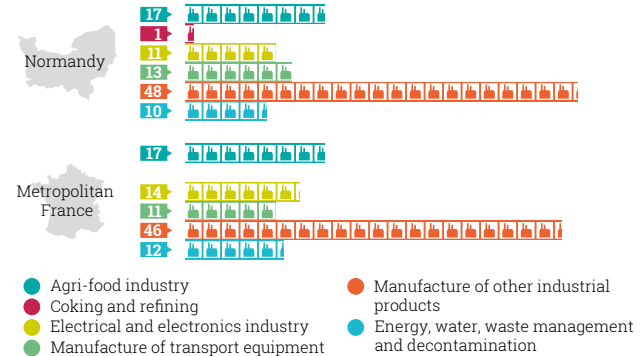
The presence of leading companies and major national industrial groups (Renault, Peugeot-Citroën, EDF, Areva, DCNS, Aircelle, Sanofi Pasteur, Aptar, Elle & Vire...).

*Data calculated based on 2010. Therefore it cannot be compared to the data provided in the previous editions which is calculated based on 2005.

Sources: Insee - Employment estimates, REE Sirene, Regional accounts

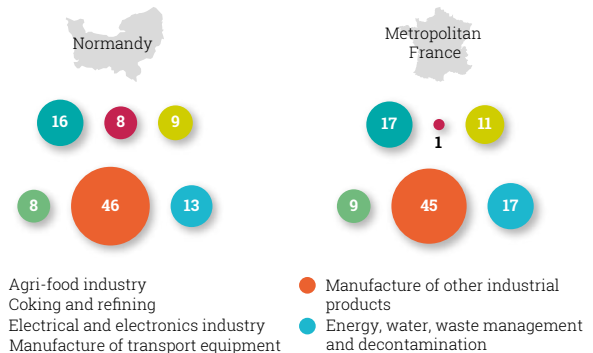
Salaried jobs by industrial sector (as %, 01.01.2014)

Source: Insee - Employment estimates. Produced by: CCI Normandie



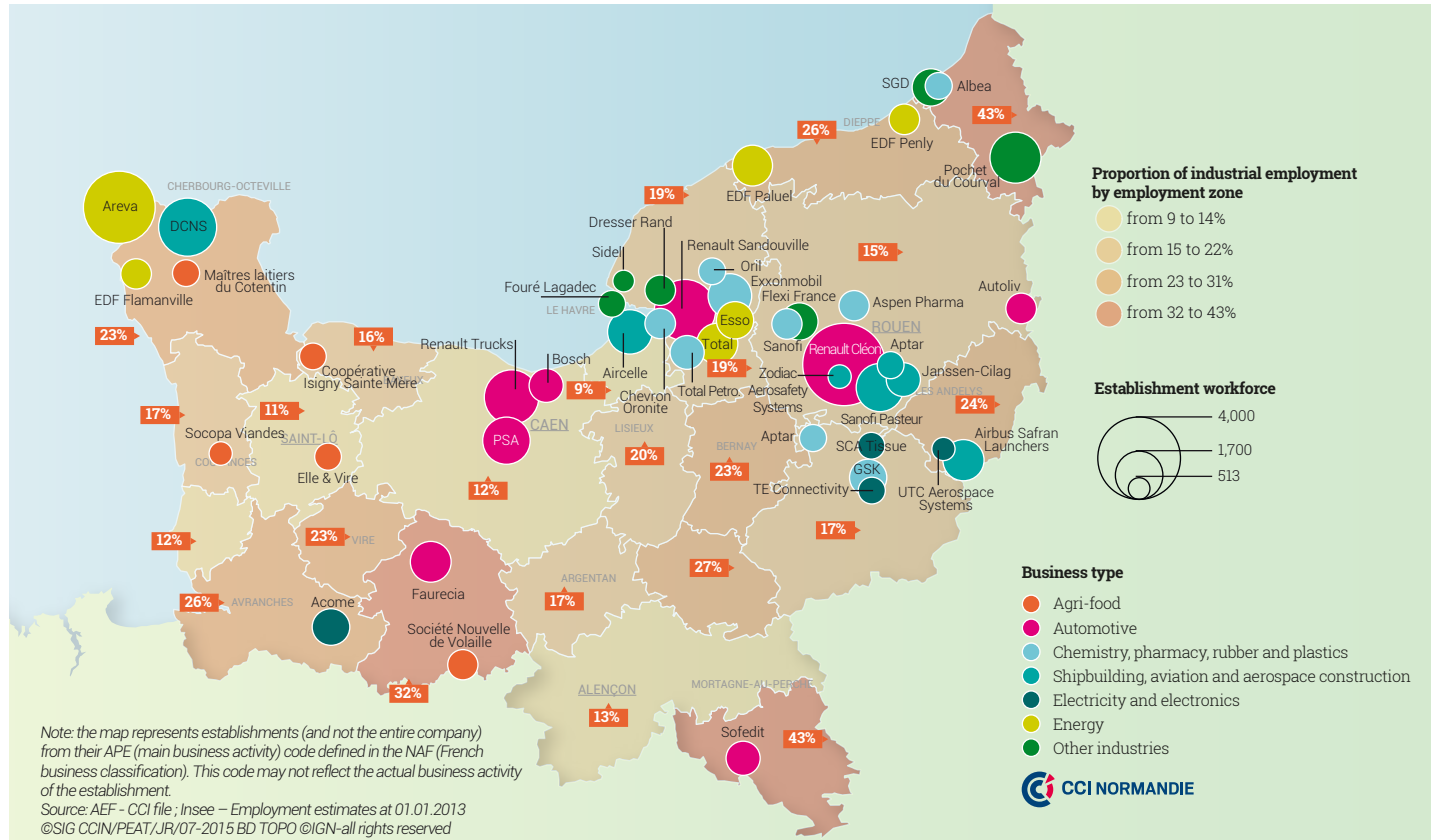
Added value by industrial sector (as %, 2012)

Source: Insee - Regional accounts. Produced by: CCI Normandie



Industry

Industrial establishments with more than 500 employees (2015)



Industry > Focus on agri-food industries

A growing sector, the Normandy agri-food industry generates 6 billion euros turnover and invests more than 250 million euros, allowing it to distinguish itself in various markets such as dairy products, coffee and cocoa processing.

25,100 salaried employees* (01.01.2013)

12.2% of Normandy industrial salaried employment (11.9% for Metropolitan France)
Ranked 3rd nationally
More specialised employment in the west of Normandy.

740 establishments* (01.01.2013)

Presence of several major agri-food groups: Nestlé, Ferrero, Danone, Lactalis, Bigard-Socopa-Charal, Agrial, Isigny-Sainte-Mère...

2.6 billion euros of gross added value** (GAV) (2012)

3.3% of regional total (2.3% for Metropolitan France)
6.2% of GAV for French agri-food industries

6.2 billion euros turnover (2012)

253 million euros of investments (2012)

3.7 billion euros of export (2014), 4th ranked exporting region

Improved employment resistance in Normandy over the last 10 years: -
2.5% vs. 7.7% in Metropolitan France (2003 – 2013)
3rd most resilient region

A diverse Normandy offer based on specialisations:

2nd ranked region for the milk industry
3rd ranked region for fishing and cocoa, tea and coffee processing industries

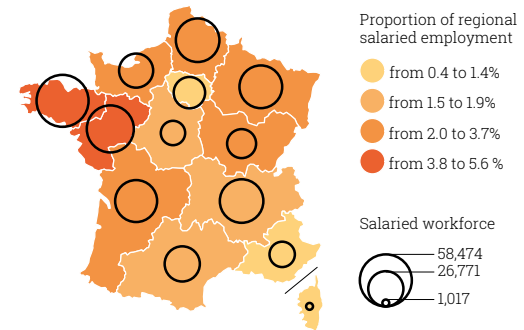
*Agri-food industries do not include industrial activities or handicraft activity, generally included in statistical classification.

**Data calculated based on 2010. Therefore it cannot be compared to the data provided in the previous editions which is calculated based on 2005.

Sources: Insee – Clap, REE Sirene, Regional accounts; Customs; SSP – ESANE, companies with 20 employees or more from divisions 10 and 11 (excluding commercial handicrafts 1013B, 1071B,C,D)

Salaried jobs in the agri-food industries (2013)

Source: Insee – Clap. Produced by: CCI Normandie



Business indicators for agri-food industries (2012)

Source: SSP – ESANE, companies with 20 employees or more from divisions 10 and 11 (excluding commercial handicrafts 1013B, 1071B,C,D) Produced by: CCI Normandie

	Normandy	France
Net turnover	€6,235 million	€150,228 million
Margin rate	46.5%	34.9%
Investments	€253 million	€11,902 million
Investment rate	20.2%	41.9%
Export rate	18.0%	21.9%

Margin ratio = Gross operating surplus/added value

investment ratio = Investments/added value

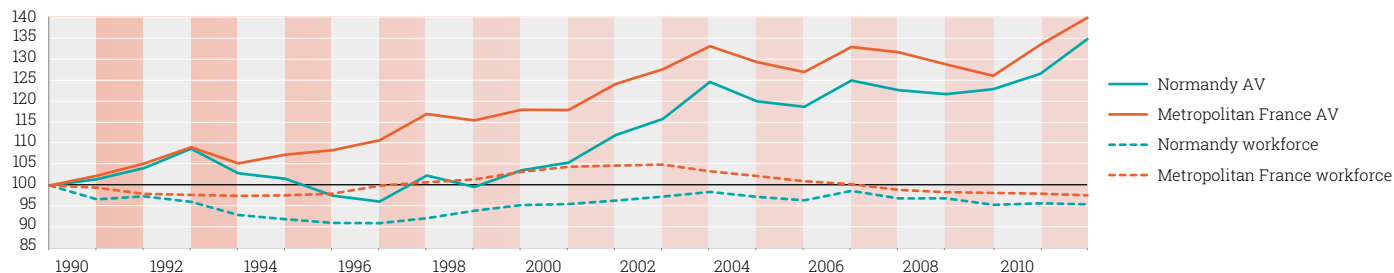
Export ratio = export turnover/total turnover

Industry > Focus on agri-food industries

Comparison of changes to gross added value and agri-food industry salaried workforce

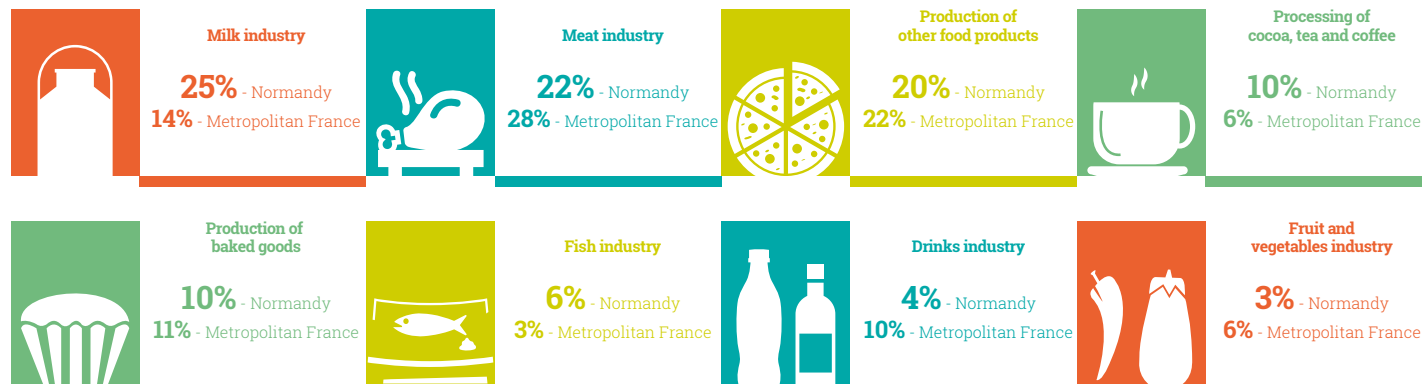
(on 31st December each year, base index of 100 in 1990)

Sources: Insee - Regional accounts, Employment estimates. Produced by: CCI Normandie



Salaried jobs by type of agri-food industry (2013)

Source: Insee - Clap. Produced by: CCI Normandie



Industry > Focus on energy

With 25,500 jobs, well-known and recognised know-how and a favourable geographic position, Normandy is a leading region for the energy industry at a national level and it consolidates this position by developing various projects, particularly in renewable energy.

25,500 salaried jobs (01.01.2013)

2.4% of total regional employment, 1.5% in Metropolitan France
Ranked 1st nationally (7.9% of national workforce)

1,700 establishments (01.01.2013)

Total electricity production: 76,844 GWh, 14.2% of national production (2014)

3 nuclear plants, 1 thermal power station

17.3% of national nuclear electricity production

Production of 1,803GWh for renewable electricity (2014)

including 58% wind power

Production of 1,047GWh (57 farms in 2013), 6.1% of national production (2014)

Total energy consumption: 25,611 GWh (2014)

3rd highest regional energy consumption due to strong industrial presence:

7.7 MGH / inhab. (6.8 in Metropolitan France)

Leading region in the energy sector

1 oil port (Antifer) and 2 refineries (ExxonMobil and Total)

A particularly strong nuclear presence: 3 nuclear plants (Flamanville, Paluel and Penly), 1 reprocessing plant (Areva), a research centre in the Caen area, Spiral2 project (nuclear and health), Grand Carénage programme, EPR at Flamanville

Various RME (Renewable Marine Energies) development projects:

offshore wind farms (Courseulles-sur-Mer, Fécamp and Le Tréport), hydrokinetic energy (Raz de Barfleur and Raz Blanchard) as well as maintenance and manufacturing site projects (Le Havre, Ouistreham, Cherbourg, La Hague, ...)

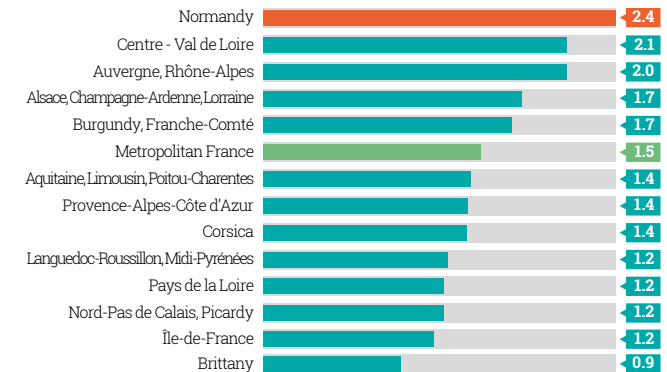
A significant effort to develop wind energy: +120% production between 2009 and 2014 (+118% in Metropolitan France)

Note: energy includes the whole industry, namely extraction, energy production (oil, gas, electricity, water), equipment manufacture, transport and distribution of energy, identified by the establishments' APE (NAF) codes.

Sources: Insee – Clap, REE Sirene, Population census; RTE; SOeS, according to EDF purchasing obligations, SEI and local distribution companies

Proportion of the Energy industry in total regional employment (as %, 2013)

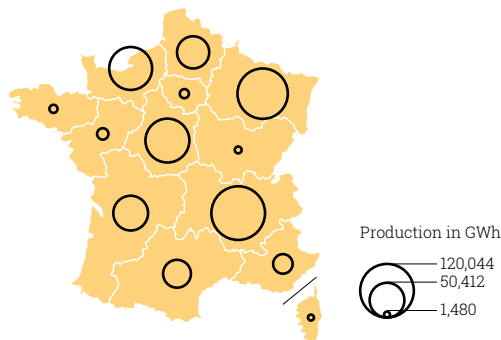
Source: Insee – Clap. Produced by: CCI Normandie



Industry > Focus on energy

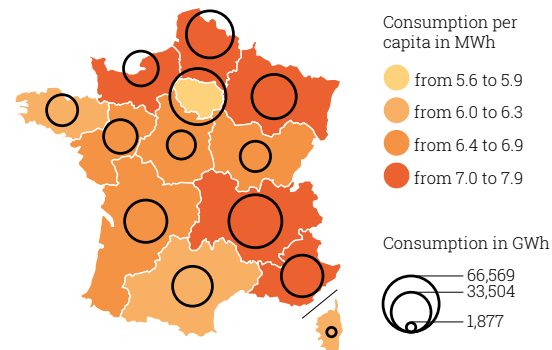
Electricity production (in GWh, 2014)

Source: RTE. Produced by: CCI Normandie



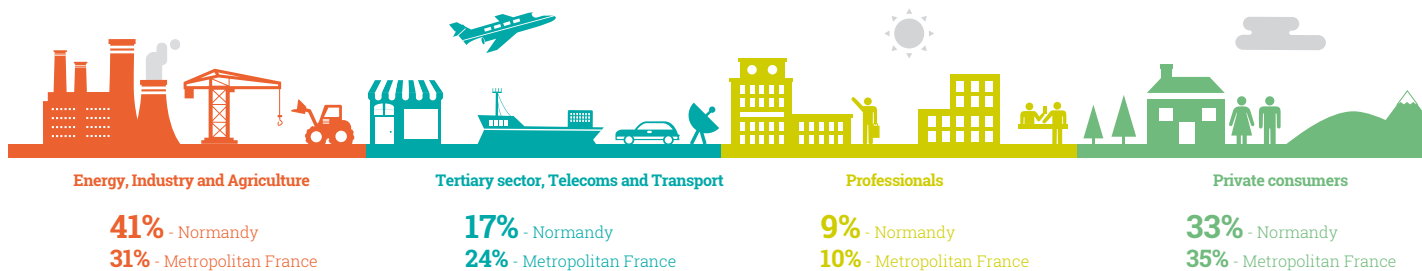
Net consumption of electricity (2014)

Sources: RTE; Insee – Population census. Produced by: CCI Normandie



Distribution of final electricity consumption (2014)

Source: RTE. Produced by: CCI Normandie



Note: The energy, industry, agriculture, tertiary sector, telecom and transport industries use voltage between 400kV and 50kV, with some customers using low voltage. Professionals and private consumers use low voltage.

Construction

Representing 7.2% of Normandy employment and 9.5% of establishments, the construction sector is mainly made up of craft construction companies, and is more focused on the construction of individual houses than the national average.

92,600 jobs (01.01.2014)

7.2% of Normandy employment (6.4% for Metropolitan France)
Ranked 2nd nationally

21,500 establishments (01.01.2013)

9.5% of Normandy establishments (10.1% in Metropolitan France)

18,000 craft establishments

84% of Normandy construction establishments

5.5 billion euros of gross added value* (2013)

6.8% of regional total (6.1% for Metropolitan France)

The construction of houses and buildings continues to decrease after a slight increase in 2013

13,181 housing starts (2014, on applicable date)

55% of individual houses (42% in Metropolitan France)

-15% compared with 2013 (-10% in Metropolitan France)

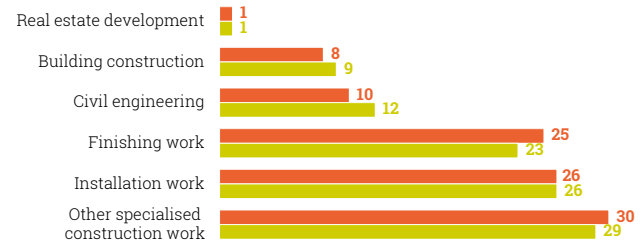
1,333,356 m² of non-residential building starts (2014, on applicable date)

*Data calculated based on 2010. Therefore it cannot be compared to the data provided in the previous editions which is calculated based on 2005.

Sources: MEEDDM - CGDD - SOeS; Insee - Regional accounts, Employment estimates, REE Sirene

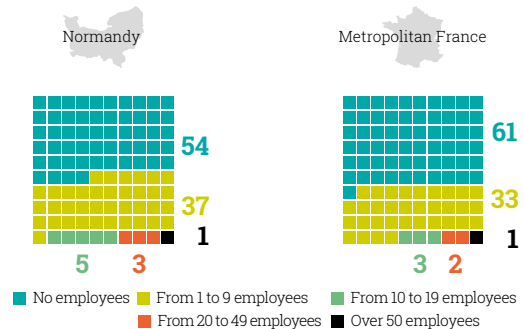
Salaried jobs in construction by activity (as %, 2013)

Source: Insee - Clap. Produced by: CCI Normandie



Construction establishments by number of workers (as %, 2013)

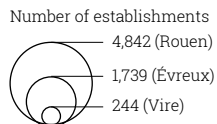
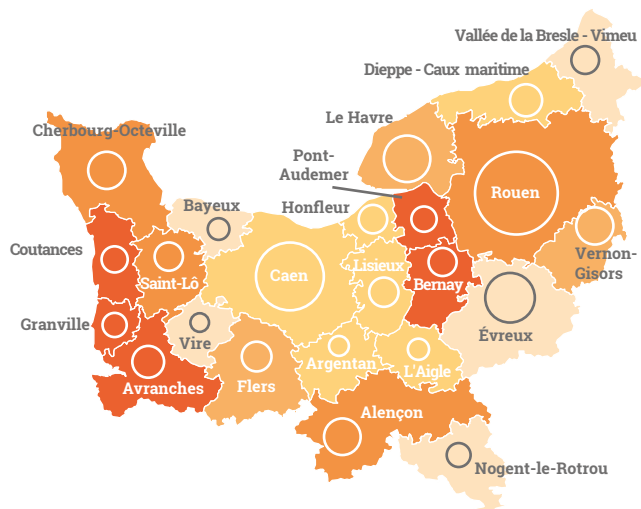
Source: Insee - REE Sirene. Produced by: CCI Normandie



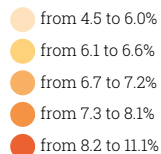
Construction

Proportion of salaried employment by employment zone and number of establishments (2013)

Sources: Insee - Employment estimates, REE Sirene, Produced by: CCI Normandie



Proportion of salaried employment



Housing starts by type (on applicable date, 2014)

Source: MEEDDM-CGDD-SOeS. Produced by: CCI Normandie



Single-family individual housing

42% - Normandy
31% - Metropolitan France



Collective housing

38% - Normandy
50% - Metropolitan France



Grouped individual housing

13% - Normandy
11% - Metropolitan France



Residence housing

7% - Normandy
8% - Metropolitan France

Surface area of non-residential building starts by type

(as %, on applicable date, 2014)

Source: MEEDDM - CGDD - SOeS. Produced by: CCI Normandie

	Normandy	Metropolitan France
Agricultural premises	36	26
Public service	20	19
Warehouses	13	13
Industrial premises	9	10
Trade	9	13
Offices	8	12
Handicraft	4	4
Hotel accommodation	1	3

Trade

With around 160,000 jobs and 7.3 billion euros of added value, trade in Normandy is a dynamic sector which develops numerous commercial development projects, a key factor for the attractiveness of a territory.

159,800 jobs (2012)

12% of Normandy employment

14% of non-salaried jobs, 11% for all regional sectors

38,700 establishments (01.01.2013)

17.1% of Normandy establishments

5,200 commercial establishment creations (2013)

13.3% creation rate (13.9% in Metropolitan France)

7.3 billion euros of gross added value* (GAV) (2012)

9.1% of regional total, 10.4% in Metropolitan France

An average facilities ratio of 49.9 retail businesses per 10,000 inhabitants (2014)

52.3 in Metropolitan France

6th ranked region for food retail trade

6th ranked region for supermarkets

A sector dominated by a proportion of employees (36%) higher than the regional average (29%)

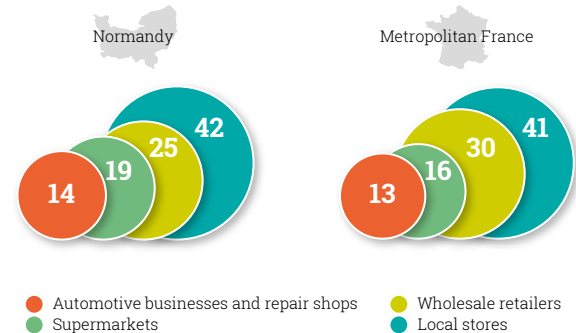
Mainly in supermarkets and local shops

**Data calculated based on 2010. Therefore it cannot be compared to the data provided in the previous editions which is calculated based on 2005.*

Sources: Insee – Permanent Facilities Database, REE Sirene, Regional accounts, Population census

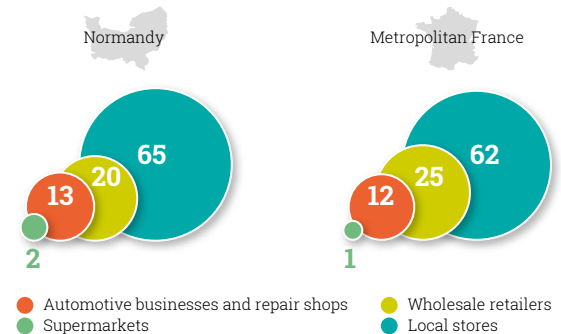
Jobs by activity (as %, 2012)

Source: Insee – Population census. Produced by: CCI Normandie



Establishments by activity (as %, 2013)

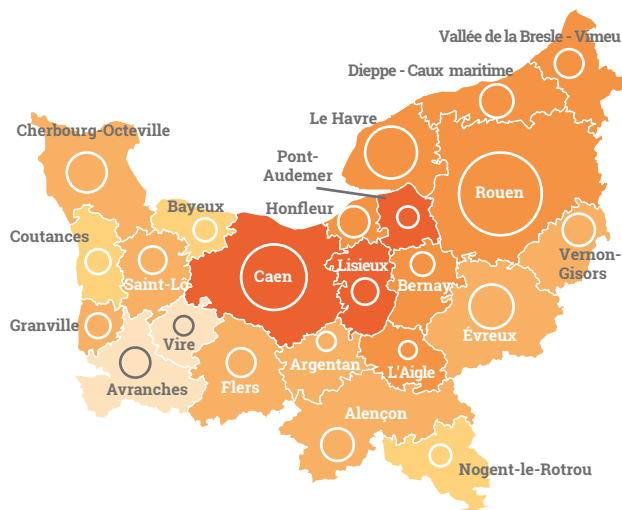
Source: Insee – REE Sirene. Produced by: CCI Normandie



Trade

Establishments and creation rate in trade by employment zone (2013)

Source: Insee – REE Sirene. Produced by: CCI Normandie



Retail facilities ratio (2014)

(Number of facilities per 10,000 inhabitants)

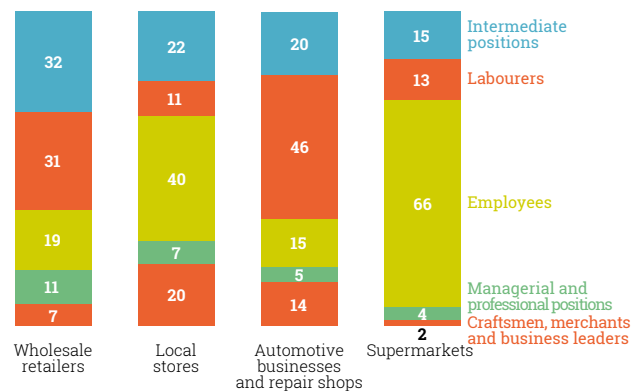
Sources: Insee – Permanent Facilities Database, Population census.

Produced by: CCI Normandie

	Normandy	Metropolitan France
Supermarkets	2.9	2.6
Food-based trade	16.4	15.7
Non-food specialised trade	30.6	33.9
Total	49.9	52.2

Distribution of jobs by activity and socio-professional categories (as %, 2012)

Source: Insee – Population census. Produced by: CCI Normandie



Services

A major sector for the Normandy economy with 61% of regional added value, the Normandy services sector is characterised by certain sectors due to specific geographical characteristics, particularly in transport and logistics, as well as tourism.

773,000 jobs (2012)

60% of regional jobs (64% in Metropolitan France)

7.7% of non-salaried jobs

A specific characteristic of the employment which is noticeable in the Transport-Logistics sector as well as human health and social work.

268,800 jobs in public service (2014)

110,300 establishments (01.01.2013)

48.8% of regional establishments (54.2% in Metropolitan France)

Creation at a lower level than the national average: 12.7% vs. 14.2%

Strong momentum in scientific research and development activity: 30% of establishment creations in services

49.6 billion euros of added value* (2012)

61.1% of regional added value (67.6% in Metropolitan France)

Service facilities rate (excluding trade): 24.4 facilities per 1,000 inhabitants (2014)

28.9% in Metropolitan France

*Data calculated based on 2010. Therefore it cannot be compared to the data provided in the previous editions which is calculated based on 2005.

Sources: Insee – Population census; REE Sirene; Regional accounts; BPE; SIASP

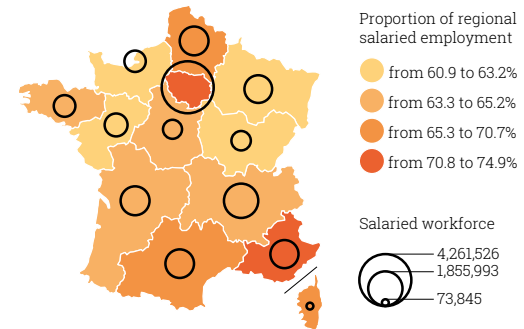
Proportion of service areas in salaried employment (as %, 2014)

Source: Insee - Employment estimates. Produced by: CCI Normandie

	Normandy	Metropolitan France
Transport and storage	9.4	8.4
Accommodation and catering	4.8	5.8
Information and communication	1.6	4.4
Financial and insurance activities	4.1	5.2
Real estate activity	1.4	1.4
Scientific and technical activities - administrative and support services	15.6	18.2
Public service, teaching, human health, social work	54.5	48.5
Other service activities	8.6	8.1

Salaried jobs in services (2014)

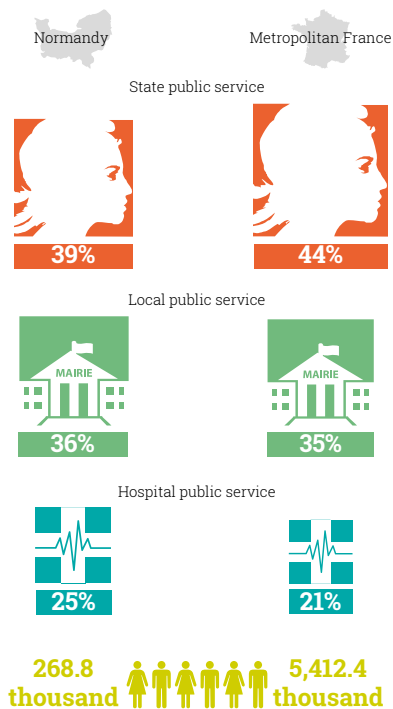
Source: Insee - Employment estimates. Produced by: CCI Normandie



Services

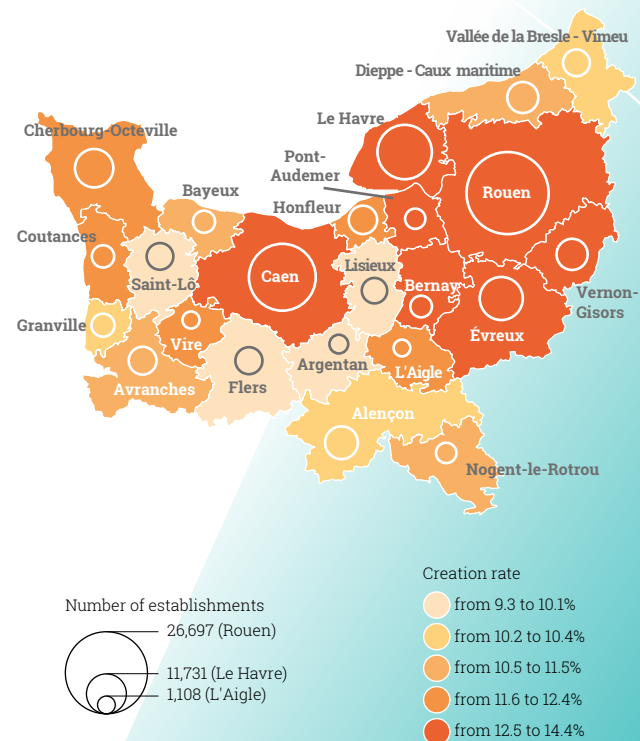
Distribution of jobs by public service area (2014)

Source: Insee – SIASP. Produced by: CCI Normandie



Establishments and creation rate in services by employment zone (2013)

Source: Insee – REE Sirene. Produced by: CCI Normandie



Services > Focus on transport & logistics

An important sector for the Normandy economy, transport and logistics employ around 68,000 employees and generate 4.8% of regional added value. The primary seafront in France, Normandy also benefits from a network of high-performance players and high-quality infrastructures.

67,600 salaried employees* (01.01.2014)

5.9% of regional salaried employment (5.6% in Metropolitan France), ranked 3rd nationally

5,400 establishments (01.01.2013), 2.4% of Normandy establishments

3.9 billion euros of added value* (2012)

4.8% of regional added value (4.6% in Metropolitan France)

16,922 million tonne-kilometres of road freight transport (2014, incoming, outgoing and sub-regional flows)

Primary French coastline

96.2 million tonnes of goods (2014)

Haropa (Le Havre – Rouen): 89.2 million tonnes of goods

An increase in sea freight boosted by containers: 2.648 million TEU, +2.3%

Other regional and departmental Normandy ports record 7 million tonnes of goods, including 65% generated by the Associated Normandy Ports (PNA)

2.9 million passengers including 77% cross-channel passengers (2014)

An 5.4% increase in traffic compared with 2013 (+3.5% for cross-channel travel)

650,000 cruise passengers (+12% compared with 2013); around 200 stopovers

Strong logistics capabilities in Normandy (start of 2015)

914 ha. of logistics property immediately available for 93 activity areas

41 warehouses measuring over 5,000m², immediately available

43 warehouses measuring between 3,000m² and 5,000m², immediately available

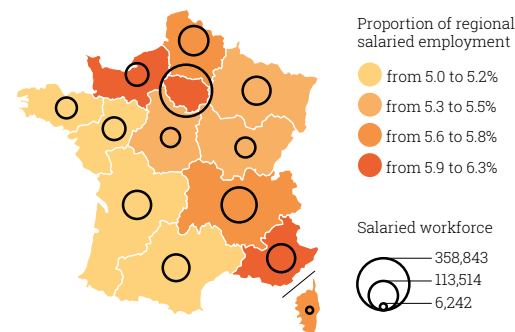
1 competitiveness cluster, 2 sector support structures

*Data calculated based on 2010. Therefore it cannot be compared to the data provided in the previous editions which is calculated based on 2005.

Sources: Insee – Employment estimates, REE Sirene, Regional accounts; Haropa; PNA; Dieppe Port Joint Association; CCI Fécamp-Bolbec; CCI Centre et Sud Manche; CCI Littoral-Normand-Picard; CCI Normandie; LSN; MEDDE – CGDD – SoeS – TRIM survey

Salaried jobs in transport and storage (01.01.2014)

Source: Insee - Employment estimates. Produced by CCI Normandie



Maritime activity of key Normandy ports

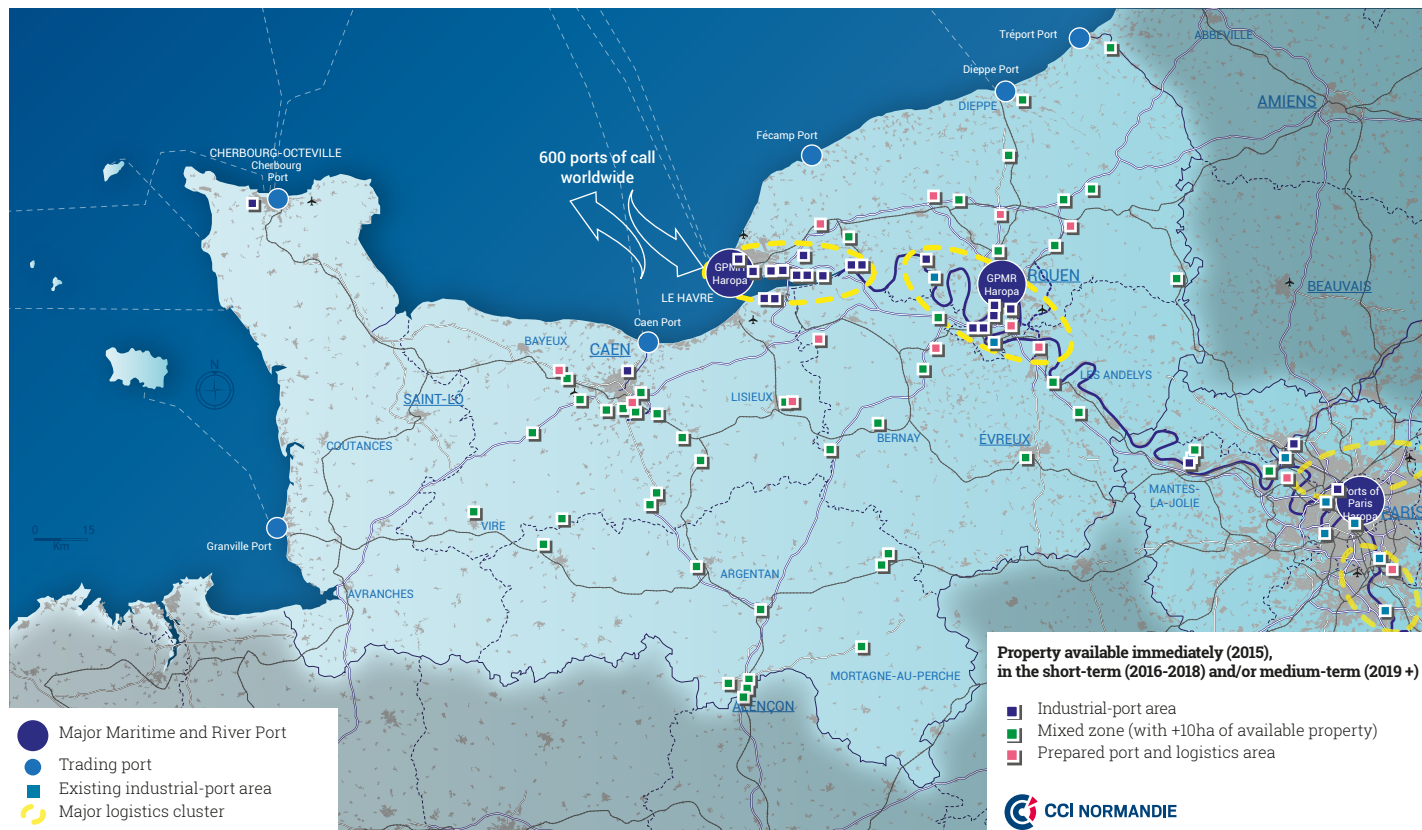
Sources: Haropa; Associated Normandy Ports; Dieppe Port Joint Association; CCI Fécamp-Bolbec; CCI Centre et Sud Manche; CCI Littoral-Normand-Picard; FranceAgriMer. Produced by CCI Normandie

	Freight traffic in thousands of tonnes (2014)	Cross-channel passengers (2014)	Fishing in tonnes of fish* (2013)
Le Havre	67,574	268,200	–
Rouen	21,671	–	–
Caen-Ouistreham	3,123	967,202	–
Dieppe	1,768	285,368	2,875
Cherbourg	1,366	512,399	5,319
Le Tréport	357	–	–
Fécamp	231	–	2,895
Granville	79	177,880	10,465
Port en Bessin	–	–	7,218
Grandcamp-Maisy	–	–	2,352

*Declared sales at fish markets

Services > Focus on transport & logistics

Paris Seine Normandie®, interconnected logistics momentum



Source: Paris Seine Normandie © Logistics Observatory

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Services > Focus on tourism

Normandy is a leading tourist destination, with many remarkable sites and the organisation of major international events.

18.7 million visits to Normandy tourist sites and attractions (2014)

In 2014, Normandy welcomed the entire world:

70th anniversary of the Normandy Landings: 4 million visitors to remembrance sites between March and August 2014 (+60% compared with 2013)

World Equestrian Games (August-September 2014): 575,000 spectators

Canoe Polo World Championships (September 2014): 75,000 spectators

1.1 million listed tourist beds (01.01.2015)

77% non-commercial beds and 23% commercial beds

14.9 million overnight stays in commercial accommodation

(Hotels, outdoor accommodation, holiday cottages and collective accommodation) (2014)

73% French overnight stays, 27% overseas visitor stays

10% reduction in foreign hotel occupancy and 8% reduction at camp sites and holiday cottages (at reservation centre) (between May and September 2014)

3.4 million business overnight stays in hotels (2014)

1.4 billion euros in investments (2011-2012-2013)

Normandy, a popular destination for French citizens

11.7 million journeys (2014)

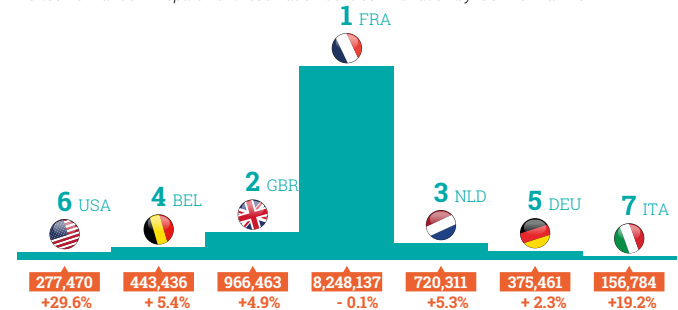
Tourism consumption: 5.7% of Normandy GDP (2014)

*There are around 40 sites which make up the Invasion of Normandy historic space, 28 agreed to participate in monthly occupancy surveys.

Sources: Insee; MKG Hospitality; DGE; TNS Sofrès; CRT Normandie; CDT

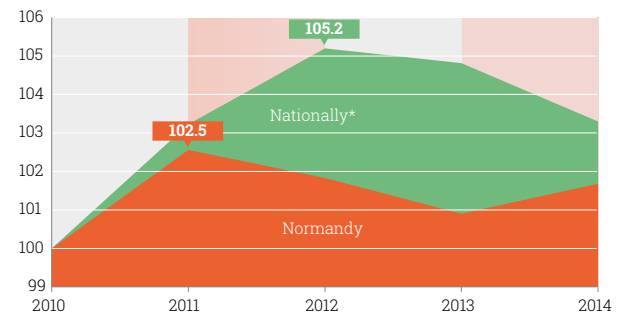
Main customers in commercial accommodation, by number of overnight stays (hotels, outdoor accommodation and holiday cottages) (2014 and 2014/2013 changes)

Sources: INSEE-DGE (Hotel and Outdoor Accommodation Occupancy Surveys); Gîtes de France – Department reservation centres. Produced by: CCI Normandie



Changes to hotel occupancy (base index of 100 in 2010)

Source: INSEE-DGE (Hotel occupancy survey). Produced by: CCI Normandie

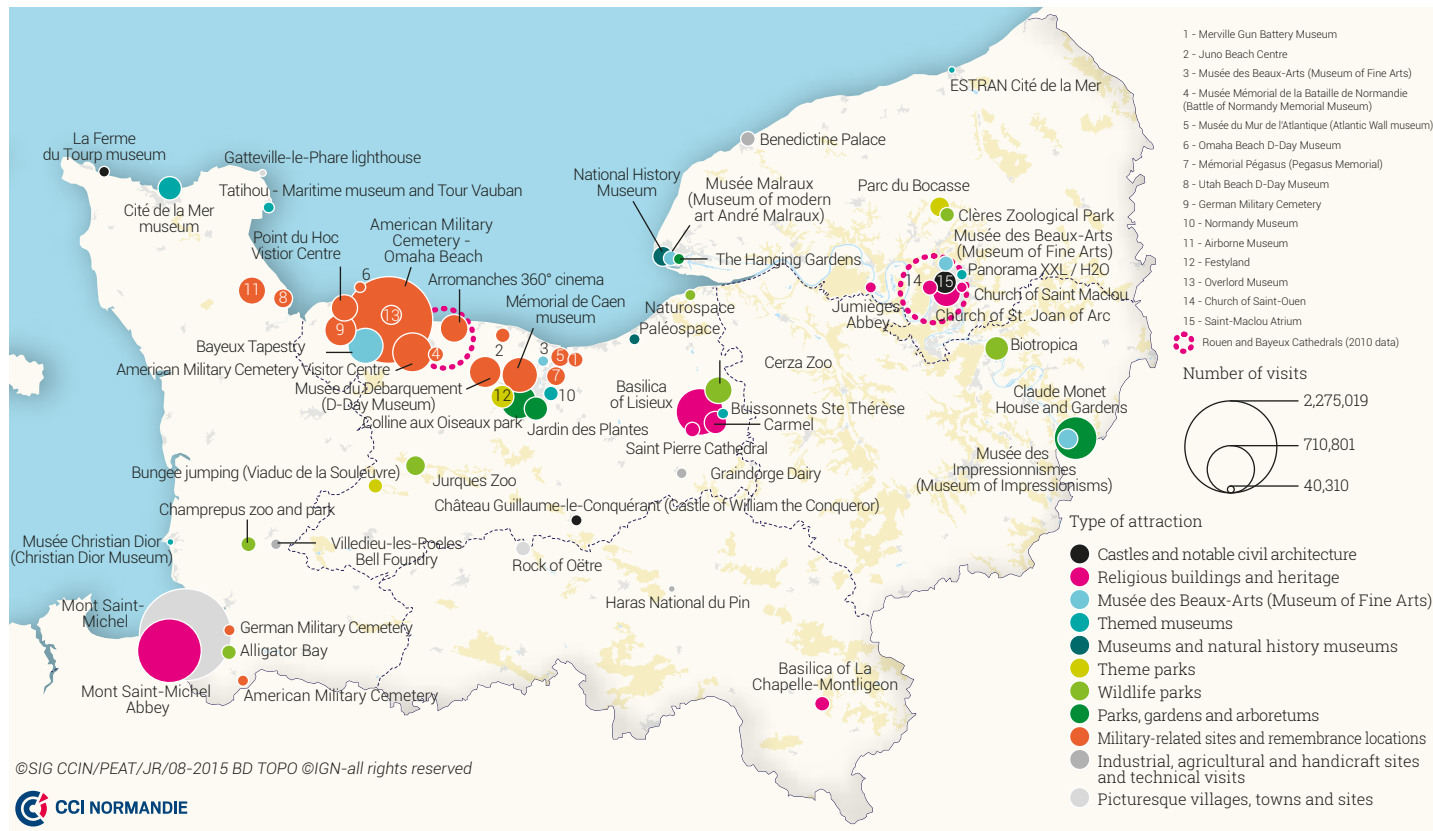


*Break in series for 2012 - France backdata

Services > Focus on tourism

Normandy tourist sites and attractions which recorded more than 40,000 visits (2014)

Sources: CRT Normandie; CDT. Produced by: CCI Normandie



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Environment

Ranked 2nd in industrial regions for its investments in environmental protection and 3rd for the amount of "green" jobs, Normandy is strongly involved in the collective effort to protect the environment.

8,120 "green*" jobs (2012)

0.6% of regional employment
0.5% in Metropolitan France

113.5 million euros of industrial investments to protect the environment (2012)

8.1% of national industrial investments
Ranked 2nd nationally

483 million m³ of abstracted freshwater per year (2012)

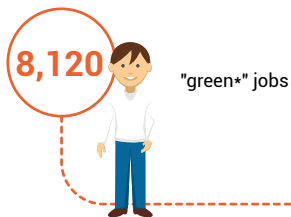
4.3% of total abstraction in Metropolitan France

349 kg of standard waste collected per capita in Normandy (2013)

-18% since 2007 (-12% for France)

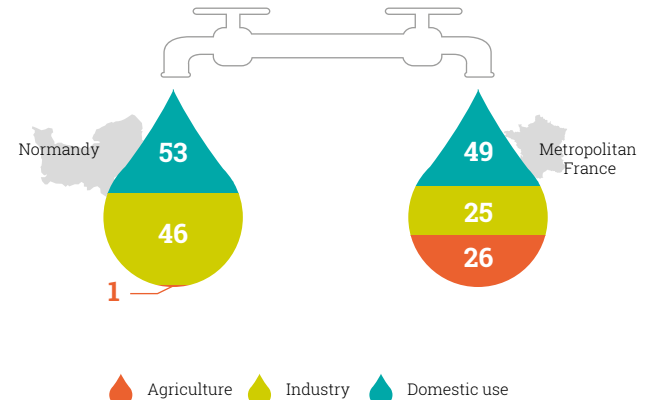
*"Green" jobs have an environmental purpose and correspond to jobs in the production and distribution of energy and water, the protection of nature, sanitation, waste treatment and other more cross-cutting jobs.

Sources: Insee – Population census, CLAP; Ademe - National survey; Sessi - Antipol survey; SOeS - Water supply agencies; SSP



Abstraction of fresh water by sector (as %, 2012)

Source: SOeS - Water supply agencies. Produced by: CCI Normandie



Transport used by the working population to get to work (as %, 2012)

Source: Insee - Population census. Produced by: CCI Normandie

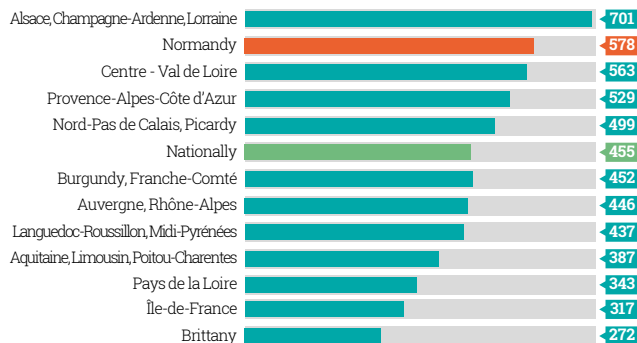


Environment

Industry investments in environmental protection

(in euros per employee, 2012)

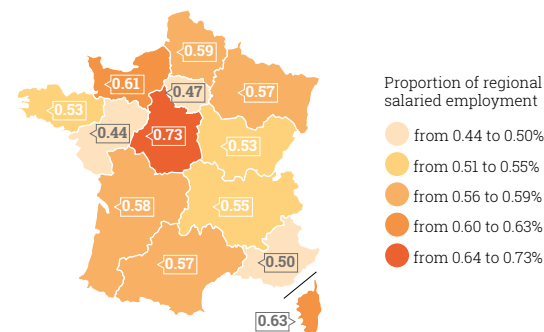
Sources: SSP; Insee - Clap; Sessi - Antipol survey. Produced by: CCI Normandie



Note: the PACA region includes Corsica and the IDF region includes the overseas departments.

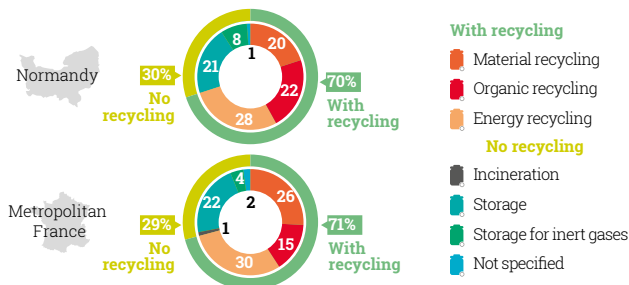
Proportion of green jobs for all jobs (as %, 2012)

Source: Insee - Population census. Produced by: CCI Normandie



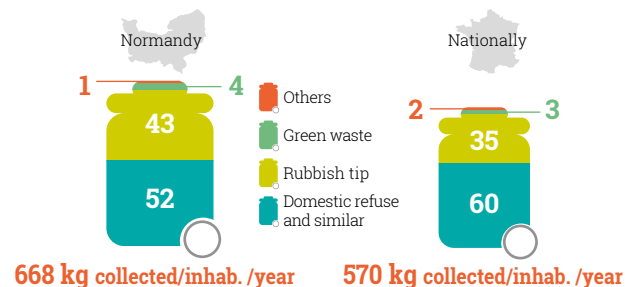
Destination of household and similar waste (as %, 2013)

Source: Ademe - National survey. Produced by: CCI Normandie



Collection of household and similar waste (as %, 2013)

Source: Ademe - National survey. Produced by: CCI Normandie



Teaching & research > Education

The Normandy economic fabric is known and recognised for its various know-how and skills; the educational offer in Normandy is well-developed and high-performance to respond to business expectations and requirements.

School population: 735,900 pupils/students (2013-2014)
22.1% of the population
22.6% in Metropolitan France

333,000 primary school pupils (2014-2015)

278,400 secondary school pupils across 625 establishments (2014-2015)
5.3% of secondary school pupils in Metropolitan France
9.2% taught in European sections (7.1% in Metropolitan France)

Baccalaureate pass rate (2014 year): 87.6%
88.3% for Metropolitan France
35% of Normandy candidates follow the vocational stream

23,950 apprentices (2013-2014)
5.8% of apprentices in Metropolitan France

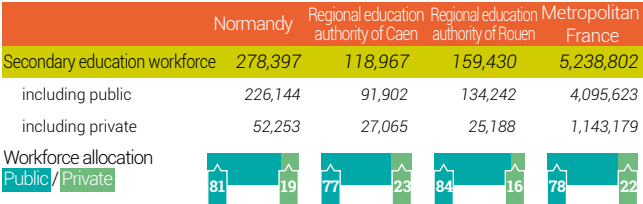
96,300 students (2014-2015)
2.9% of Normandy students
3.9% for Metropolitan France

ComUE Normandie Université (Community of Universities and Establishments) includes 8 doctoral schools, 91,700 students, including 2,200 doctoral students and 4,300 research professors. It organises the territorial coordination of higher education establishments and research organisations.

Sources: MENESR-DEPP-DGESIP-DGRI-SIES, SIFA; Normandie Université

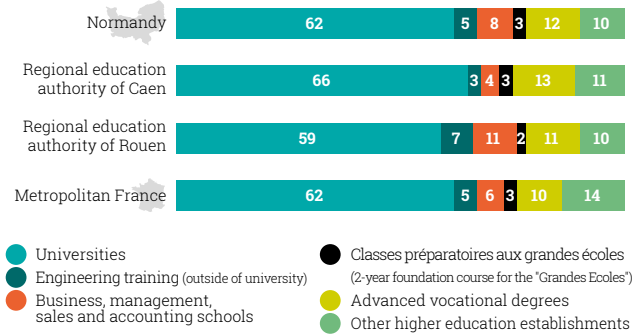
Secondary education teaching workforce (2014-2015)

Source: MENESR-DEPP. Produced by: CCI Normandie



Higher education workforce by type of establishment (as %, 2014-2015)

Source: MENESR-DEPP-DGESIP-DGRI-SIES. Produced by: CCI Normandie

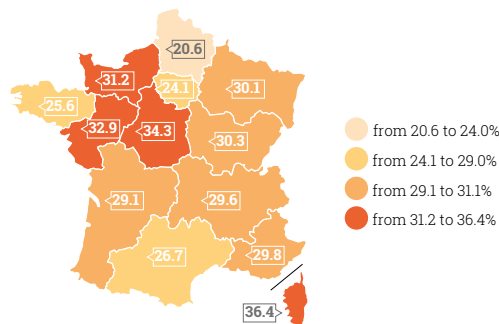


Teaching & research > Education

Proportion of apprentices in vocational secondary education

(as %, 2013-2014)

Sources: MENESR-DEPP, SIFA. Produced by: CCI Normandie



Continuing professional development (2013)

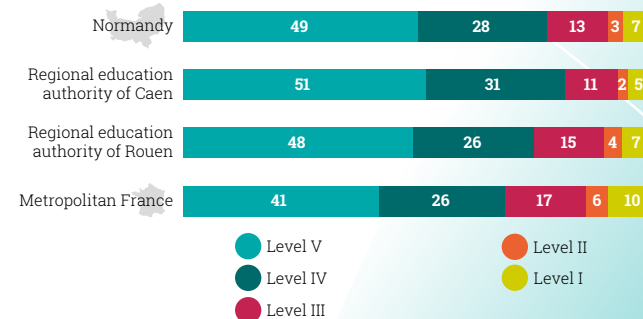
Sources: Direccte Lower Normandy; Direccte Upper Normandy.

Produced by: CCI Normandie

	Normandy	Regional education authority of Caen	Regional education authority of Rouen
Number of organisations	2,324	1,109	1,215
Number of interns	663,532	293,487	370,045
including salaried interns	414,261	168,187	246,074
including intern job seekers	116,097	49,503	66,594

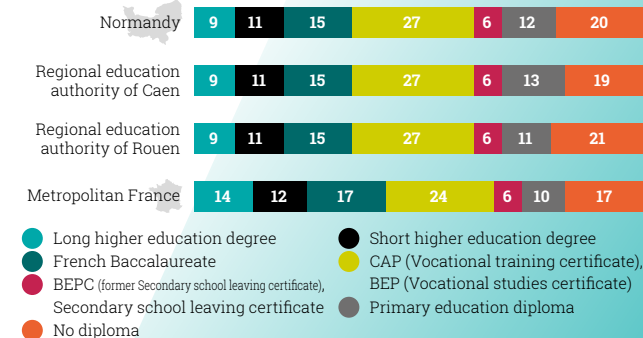
Apprentice workforce by level of education (as %, 2013-2014)

Sources: MENESR-DEPP, SIFA. Produced by: CCI Normandie



Highest level of education attained by out-of-school population aged 15 years or older (as %, 2012)

Source: Insee - Population census. Produced by: CCI Normandie



Teaching & research > Innovation, R&D

Characterised by the major presence of the private sector, Normandy research and development activity accounts for 11,000 jobs, 1.2 billion euros and 3.5% of French published patent applications.

11,100 R&D jobs (2012)

including 56.9% researchers

0.9% of regional employment, 1.5% in Metropolitan France

1.2 billion euros spent on R&D (2012)

1.3% of regional GDP (2.2% for Metropolitan France)

Ranked 2nd nationally for the significance of R&D in the private sector (2012)
67.8% of jobs and 75.5% of expenditure.

477 nationally published patent applications (2013)

3.5% of French applications

26% of applications are published by SMEs and intermediate-sized companies.

61 Young Innovative Companies located in Normandy employing 346 employees (2012)

159 innovative Normandy projects supported with €70 million.

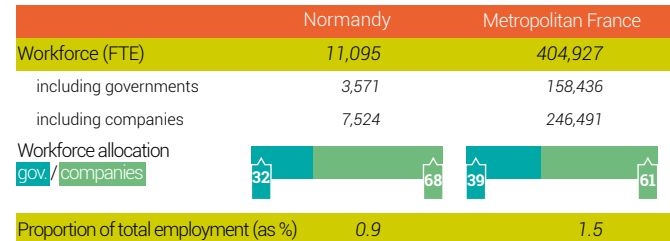
7 competitiveness clusters operating in Normandy.

Sources: Acoess/DGE; BPI France; Insee - Employment estimates, Regional accounts; MENESR - DGESIP/DGRI - SIES

Paid R&D workforce (2012)

Sources: Insee - Employment estimates; MENESR - DGESIP/DGRI - SIES.

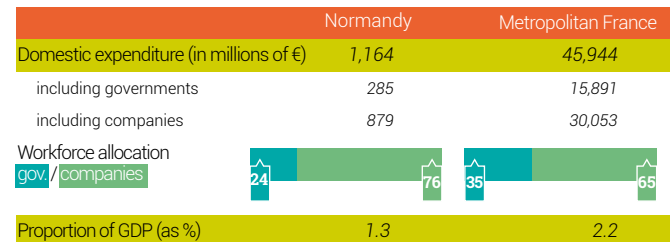
Produced by: CCI Normandie



R&D expenditure (2012)

Sources: Insee - Regional accounts; MENESR - DGESIP/DGRI - SIES.

Produced by: CCI Normandie



11,100

R&D jobs

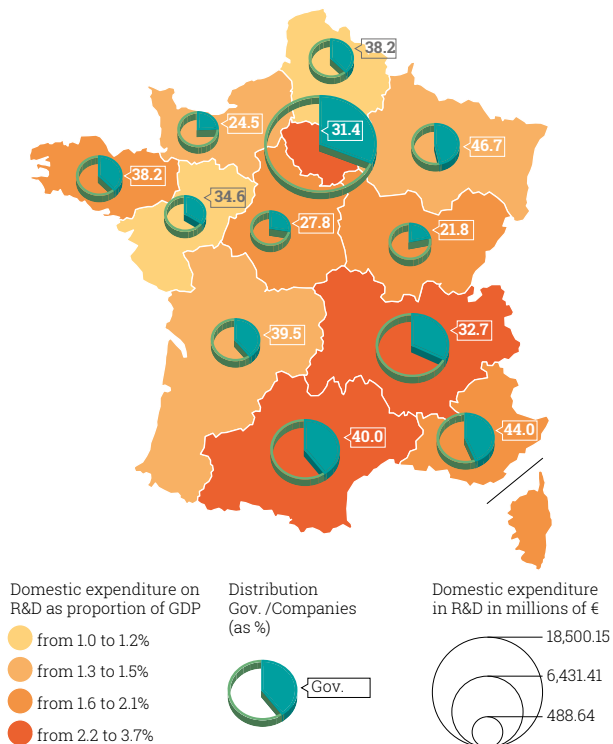


Teaching & research > Innovation, R&D

R&D effort (2012)

Sources: Insee - Regional accounts; MENESR - DGESIP/DGRI - SIES.

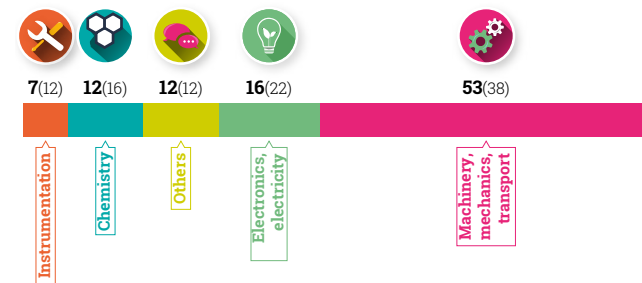
Produced by: CCI Normandie



Note: Due to statistical confidentiality, Corsica is included in the PACA region.

Nationally published patent requests by technological field (as %, 2013)

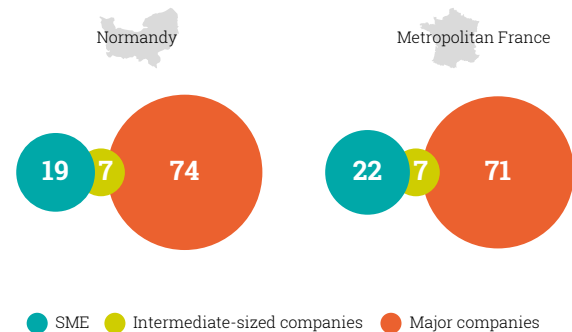
Source: INPI. Produced by: CCI Normandie



Normandy (France)

Published patent applications (as %, 2013)

Source: INPI. Produced by: CCI Normandie

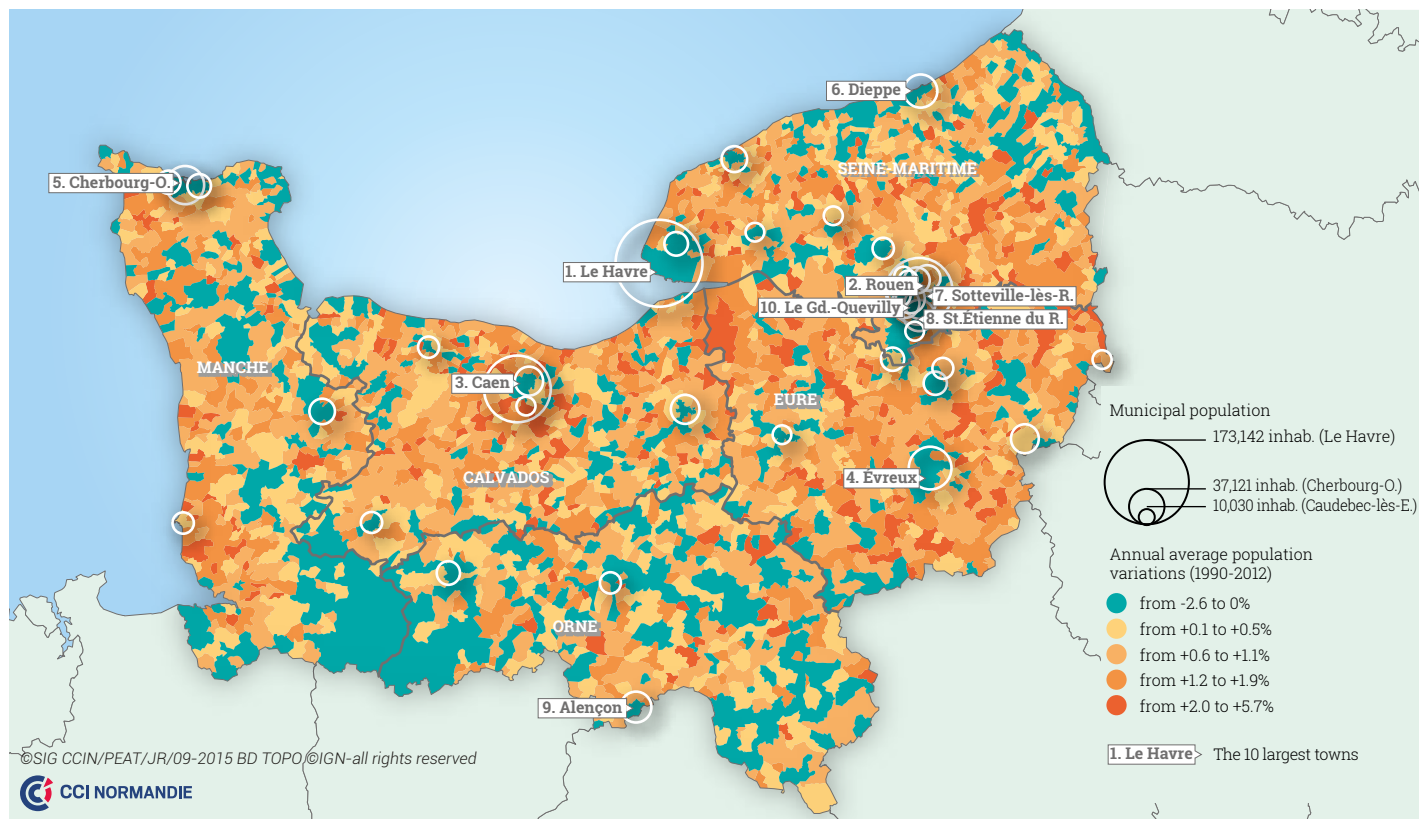


Note: Patent applications published by French legal entities.

Departments

Towns with more than 10,000 inhabitants (valid as of 01.01.2015) and average annual population variations

Source: Insee - Population census. Produced by: CCI Normandie



Departments > Calvados

With an economy which is focused on the tertiary sector, R&D and tourism, Calvados is more dynamic than the Normandy average, both in terms of employment levels and population numbers.

687,900 inhabitants (as of 2015)

20% of Normandy population, ranked 2nd regionally
Ranked 33rd nationally
124 inhabitants per km²



Slightly higher density than Normandy average (111 inhab/km²)

Population growth higher than the Normandy average:

+0.4% annual average since 2007

More moderate population growth for seaside communes

280,100 jobs (01.01.2014)

22% of Normandy jobs

Jobs growth of 3.6% since 2000 (-0.5% in Normandy)

9.8% unemployment rate (1st quarter 2015)

51,600 establishments (01.01.2013)

23% of Normandy establishments

Establishment creation rate: 13.5%

A dual identity: land and sea

A significant agri-food industry, particularly in dairy and cider production

Presence of 4 competitiveness clusters supporting the automotive, logistics, secure electronic transactions and equine industry sectors

Presence of major research facilities: GANIL, MRSH, CYCERON, SPIRAL2

Historic beaches and various yacht harbours

One of the most visited departments by the French

Sources: Insee – Population census, Employment estimates, REE Sirene; Employment Centre – Dares; Calvados Departmental Board

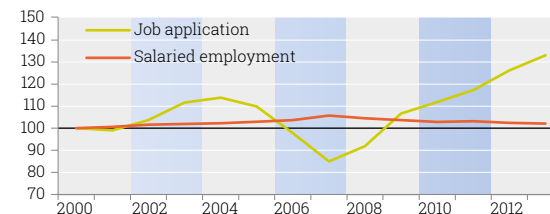
Salaried employment and establishments by business sector in Calvados (as %, 2014)

Sources: Insee - Employment estimates, REE Sirene, Produced by: CCI Normandie



Changes to salaried employment and job applications in Calvados (ABC categories, base index of 100 in 2000)

Sources: Insee – Employment estimates; Employment Centre - Dares



Trouville-sur-Mer beach



Departments > Eure

The primary industrial department in Normandy, Eure is showing dynamic population growth and is known for its numerous highly specialised regional sectors, such as aviation, cosmetics and pharmacy.

591,600 inhabitants (as of 2015)

18% of Normandy population, ranked 3rd regionally

Ranked 42nd nationally

98.0 inhabitants per km²

Steady population growth

(+0.7% annual average since 2007)



194,300 jobs (01.01.2014)

Primary industrial department in Normandy: 22% employment in industry

15% of Normandy jobs

10.4% unemployment rate (1st quarter 2015), higher than the national average (10.0%)

37,700 establishments (01.01.2013)

17% of Normandy establishments

The highest proportion of construction establishments in Normandy (12.5%)

Establishment creation rate: 13.5%

A historically industrial department

A diverse economy: chemistry, pharmacy, cosmetics, aviation and aerospace, agri-food, logistics... with the presence of major leading industrial groups in their sectors: GlaxoSmithKline, Snecma, Sanofi, Aptar, ...

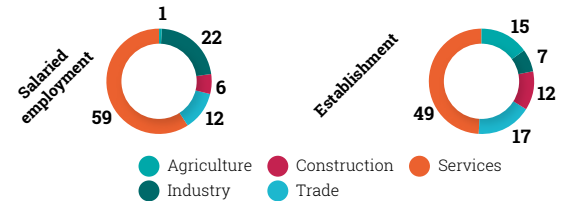
3 competitiveness clusters: Cosmetic Valley, Mov'eo and Nov@log

Historic and cultural heritage: more than 5% of French listed sites

Sources: Insee – Population census, Employment estimates, REE Sirene; Employment Centre – Dares; Eure Departmental Board

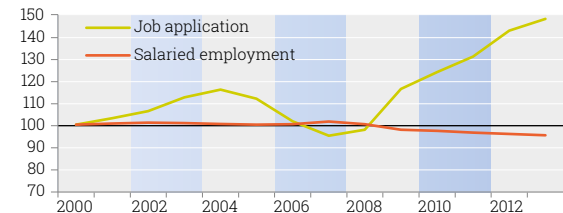
Salaried employment and establishments by business sector in Eure (as %, 2014)

Sources: Insee – Employment estimates, REE Sirene, Produced by: CCI Normandie



Changes to salaried employment and job applications in Eure (ABC categories, base index of 100 in 2000)

Sources: Insee – Employment estimates; Employment Centre – Dares



Château Gaillard - Les Andelys



Departments > Manche

A seaside department with 350 km of coastline, Manche is known for its fishing, sailing, tourism and energy activities, including nuclear energy and the development of Renewable Marine Energies.

499,350 inhabitants (as of 2015)

15% of Normandy population, ranked 4th regionally

Ranked 51st nationally

84.1 inhabitants per km²

An average annual increase of 0.2% since 2007 (+0.5% in Metropolitan France)

Two-thirds of communes with less than 1,000 inhabitants experiencing population growth



189,200 jobs (01.01.2014)

15% of Normandy jobs

Twice as many jobs in agriculture than the Normandy average (2.3%) and a larger proportion of industrial jobs than in Normandy as a whole (19.1% vs. 17.5%)

8.4% unemployment rate (1st quarter 2015), lower than Normandy average

40,100 establishments (01.01.2013)

18% of Normandy establishments

An agricultural department: 31.5% of establishments

Establishment creation rate: 10.4%

A port tradition

Granville and Cherbourg respectively the 6th and 14th largest French fish auctions (2013)

Agriculture, an important part of the economy: with livestock, apples, vegetables, fishing, aquaculture and shellfish farming.

A structured nuclear sector: presence of world leaders (Areva, EDF, DCNS), a state-of-the-art SME network and developed research activity with Nucléopolis.

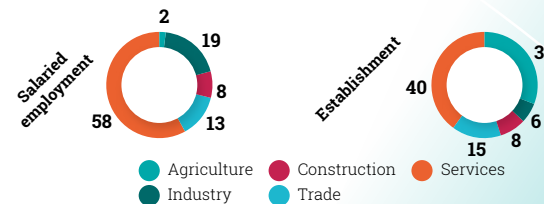
Economic development geared towards innovative sectors (RME, sea farming, sailing, digital...)

Various tourist attractions, including Mont Saint-Michel

Sources: Insee – Population census, Employment estimates, REE Sirene; Employment Centre – Dares; Manche Departmental Board; CCI Centre et Sud Manche; FranceAgriMer

Salaried employment and establishments by business sector in Manche (as %, 2014)

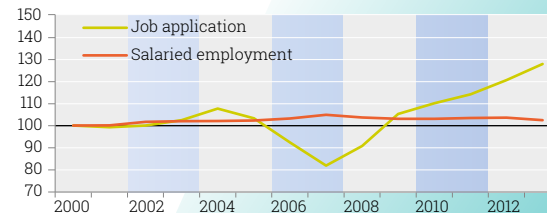
Sources: Insee – Employment estimates, REE Sirene, Produced by: CCI Normandie



Changes to salaried employment and job applications in Manche

(ABC categories, base index of 100 in 2000)

Sources: Insee – Employment estimates; Employment Centre – Dares



Fort de la Hougue - Saint-Vaast-la-Hougue



Departments > Orne

The least populated department in Normandy, Orne has experienced a significant decline in employment despite numerous specific characteristics in the agricultural and industrial sectors, with attractive assets for the territory (the CED in Caligny and the CIRIAM in Flers).

290,000 inhabitants (as of 2015)

9% of Normandy population, ranked last regionally

Ranked 73rd nationally, 47.5 inhabitants per km²

Density 2.3x lower than Normandy average (111 inhab/km²)

A slight fall in population (-0.2% annual average since 2007) and a natural balance close to zero

Around half the population live in a town with fewer than 1,000 inhabitants



107,200 jobs (01.01.2014)

8% of Normandy jobs

A significant decrease in employment: -11.3% since 2000

Twice as many jobs in agriculture than the Normandy average (2.4%)

9.3% unemployment rate (1st quarter 2015)

24,900 establishments (01.01.2013)

11% of Normandy establishments

An agricultural department: 32.1% of establishments

Establishment creation rate: 10.8%

An agricultural and industrial department

13th ranked French agricultural department and top ranked Normandy department for its organic farming

Major cattle farming and farms mainly focused on milk production
The equine industry, a key factor in the department's economic, tourism, farming and sport development

A strong industrial tradition in agri-food, plastics manufacture and the automotive industry.

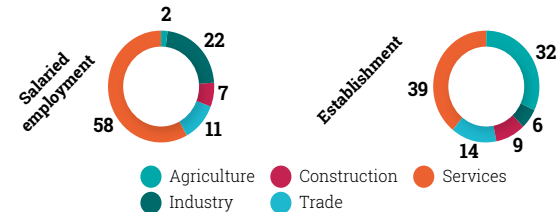
The Dynamic Testing Centre (CED) in Caligny is recognised by automotive, aviation and railway manufacturers.

An area for relaxation and well-being with the health resort in Bagnoles-de-l'Orne

Sources: Insee – Population census, Employment estimates, REE Sirene; Employment Centre – Dares; Normandy Chamber of Agriculture; Orne Chamber of Agriculture; Orne Departmental Board, Orne Prefecture

Salaried employment and establishments by business sector in Orne (as %, 2014)

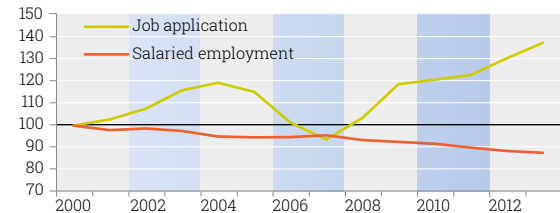
Sources: Insee - Employment estimates, REE Sirene, Produced by: CCI Normandie



Changes to salaried employment and job applications in Orne

(ABC categories, index basis 100 in 2000)

Sources: Insee – Employment estimates; Employment Centre - Dares



Health resort in Bagnoles-de-l'Orne



Departments > Seine-Maritime

The most important Normandy department in terms of jobs and population, Seine-Maritime is particularly well-known for its energy, chemistry, and automotive industries and transport and logistics.

1,253,950 inhabitants (as of 2015)

38% of Normandy population, ranked top regionally

Ranked 14th nationally

199.7 inhabitants per km²

The most dense Normandy area, more than two times higher than the regional average.

Slight population growth (+0.15% annual average since 2007) supported by a positive natural balance

More significant population growth in the smaller communes

508,600 jobs (01.01.2014)

40% of Normandy jobs

11.1% unemployment rate (1st quarter 2015), higher than Normandy average

71,500 establishments (01.01.2013)

31% of Normandy establishments

Establishment creation rate: 13.0 %

Primary French coastline

2 major sea ports (Le Havre, primary container port in France and Rouen, primary European grain port) and 3 trade ports (Le Tréport, Dieppe and Fécamp)

A high-performance economy with a focus on refinery, chemistry, aviation and automotive manufacturing.

Developed and structured sectors in fine chemistry, biology-health and transport-logistics

A diverse heritage and world-renowned sites: the Etretat cliffs, Le Havre - a UNESCO world heritage site, Rouen Cathedral...

Sources: Insee – Population census, Employment estimates, REE Sirene; Employment Centre – Dares; Seine-Maritime Departmental Board, Seine-Maritime Prefecture, Le Marin

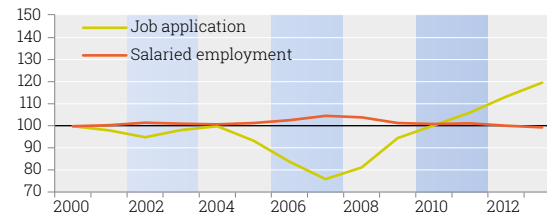
Salaried employment and establishments by business sector in Seine-Maritime (as %, 2014)

Sources: Insee - Employment estimates, REE Sirene, Produced by: CCI Normandie



Changes to salaried employment and job applications in Seine-Maritime (ABC categories, base index of 100 in 2000)

Sources: Insee – Employment estimates; Employment Centre – Dares



City of Rouen



Corporate networks



Automotive

Mov'eo

pole-moveo.org
President: Jean-Pierre VALLAUDE

Automotive and public transport R&D:
Intelligent mobility solutions, road user safety,
thermal powertrains, Environmental
footprint, Energy demonstrators and storage,
Mechatronic systems for vehicle
electrification...

Aria Basse-Normandie

www.arianb-normandie.fr
President: Thierry GUIDEVAUX

Networking automotive industry players with
the aim of developing and sustaining regional
automotive industry companies: encouraging
communication, supporting industrial
performance and supporting innovation.

Aria Haute-Normandie

aria-haute-normandie.com
President: Jean-Dominique WAGRET

Networking automotive industry players
with the aim of encouraging communication,
extending and developing industry skills and
initiating individual and collective activity
in order to improve industrial performance.



Transport/Logistics

Nov@log

novalog.eu
President: Olivier MAUREL

Nov@log is the sole competitiveness cluster
dedicated to logistics and the supply chain.
It plays a key role in business
competitiveness and the development of
logistics research and innovation.

Fédération des Clubs Logistiques de BN

logexpert-bn.com
President: Tony BUHOT

Improvement of players' logistics and supply
chain performance, making innovation one
of the focuses of business competitiveness,
promoting the industry at a national and
European level, maintaining the territorial
logistics management approach to ensure
that the territory is as attractive as possible.

Logistique Seine-Normandie

logistique-seine-normandie.com
President: Alain VERNA

Coordinating the network of logistics players
and ensuring its promotion, offering a
strategy and a programme of development
activities, carrying out lobbying missions and
appraisals to develop logistics activity in the
Seine area.

Theme

Competitiveness
cluster

Industry

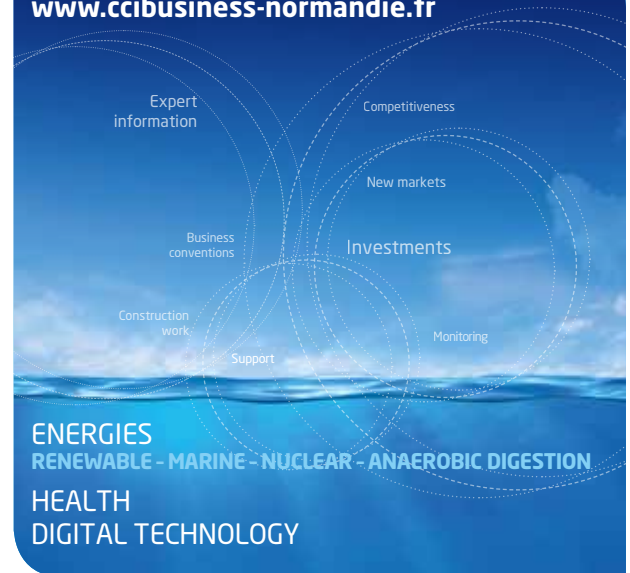
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Corporate networks

 Sea	Mer Bretagne Atlantique <p>pole-mer-bretagne-atlantique.com President: Dominique SENNETOT</p> <p>Providing economic momentum through innovation: maritime, ship and boating safety and security, energy resources and marine mining, biological marine resources, shoreline environment and development, port infrastructure and maritime transport.</p>
F2N <p>f2n.fr President: Antoine BRUGIDOU</p> <p>Nautical activities and development of dedicated port areas: encouraging the development of port areas, promoting collaborative innovation, supporting the development of its members in key emerging markets and stimulating synergies</p>	Dieppe Navals <p>dieppe-navals.fr President: François LANDAIS</p> <p>Promotion of business skills and know-how in the Dieppe basin through networking and by getting companies to work together on common problems, with the support of 4 working groups: fishing, yachting, shipbuilding and renewable energy.</p>
Ouest Normandie Énergies Marines <p>ouest-normandie-energies-marines.fr CEO: Géraldine MARTIN</p> <p>Place for companies to exchange on the topic of renewable marine energies, endeavouring to ensure the promotion of the region with players involved in the renewable marine energy field, and to organise an industrial field around these energies.</p>	
 Aviation	Normandie AéroEspace <p>nae.fr President: Philippe EUDELINÉ</p> <p>Giving the aviation and aerospace industry a major role in key future projects and technologies by grounding and developing regional activities to deal with competitiveness challenges, promoting Normandy as a leading aviation and aerospace region by attracting and retaining talents.</p>

 Agriculture/Agri-business	Ahnorria <p>ahnorria-iaa.fr President: Sébastien DUTACQ</p> <p>Representation and advocacy of companies to encourage their development and ensure the joint implementation of actions on the themes of industrial optimisation, marketing and sales strategy and communication.</p>
Valorial <p>pole-valorial.fr President: Pierre WEILL</p> <p>Innovation and R&D in agri-food (health nutrition, microbiology and food safety, innovative technologies, functional ingredients, food marketing and uses): identifying, launching and supporting joint innovative R&D projects to work towards projects which offer added value, jobs and sustainable development.</p>	Anea <p>loanea-normandie.com President: Bertrand DECLOMESNIL</p> <p>Coordination and promotion of the agri-food industry, joint performance research and advocacy on the themes of economy and production tool performance, sustainable development, market development, logistics and waste management.</p>
Hippolia <p>pole-hippolia.org President: Laurence MEUNIER</p> <p>R&D in the equine industry (health and performance, equipment and horse-related ICT) to create the most favourable environment possible for innovation projects upstream, and to connect business leaders with private investors and to encourage export downstream.</p>	Fimalin <p>www.fimalin.com President: Guy DEHONDOT</p> <p>Organisation which aims to position technical flax as the 3rd ranked composite fibre, identifying market needs, reinforcing the attractiveness of the flax industry, encouraging the manufacture of eco-designed products, being a leader in the development of technical flax and ensuring promotion of the industry.</p>
	Noveatech <p>noveatech.fr President: Jean-Pierre DELAPORTE</p> <p>Regional agro-resources contact located at the crossroads of the industry between agriculture and research, whose aim is to contribute to the development and momentum of regional industries which promote agro-resources for renewable and innovative products.</p>

Theme	Competitiveness cluster
Industry	Area of excellence

Corporate networks



Chemistry/Health

Cosmetic Valley

cosmetic-valley.com
President: Marc-Antoine JAMET

R&D in cosmetics and perfumes: networking, support of research and innovation projects, export assistance, improvement of employee skills.

Technopole CBS

technopole-cbs.com
President: Pierrick MARCHAND

Developing communication and collaboration in chemistry-biology-health between the research world and the business world to support growth and competitiveness, to encourage business development and to develop Research Development Innovation (RDI) projects.



Energy

Énergies HN

energies-haute-normandie.com
President: Eric NEYME

Creation of opportunities in the area of corporate energy efficiency, promoting energy sources and employment and associated skills by supporting companies which launch projects, promoting jobs, technological excellence and talents.

Nucleopolis

nucleopolis.fr
President: Serge BOUFFARD

Encouraging the development of the Normandy nuclear industry to serve businesses and innovation, to be the leading regional player for the industry and to be an ambassador for Normandy excellence in the nuclear industry.

Theme

Competitiveness
cluster

Industry






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Corporate networks

 <p>Electronics/ICT</p>	<p>TES</p> <p>pole-tes.com President: Gilles BRANDEL</p> <p>An organisation which creates opportunities, the cluster encourages communication between players, stimulating the growth of innovative collaborative projects, supporting project leaders and reinforcing regional attractiveness as a leading territory for service and usage experiments.</p>
<p>Novea</p> <p>fibroptiquenovea.com President: Dominique BRAULT</p> <p>The leading national skills and training centre for high-speed networks and services and a tool for companies to distribute new technologies for sustainable development purposes.</p>	<p>Novimage</p> <p>www.novimage.org President: Olivier MARRE</p> <p>Uniting economic and institutional players around a collective initiative involving sharing, promotion, use and training in digital tools and the creation of projects in imaging and augmented/virtual reality.</p>
<p>Normandie Web Xperts</p> <p>nwx.fr President: Romain PRAT</p> <p>Collection of online players to create synergies and reinforce the regional ecosystem around 3 areas: training, schools, entrepreneurship; corporate visibility, network activity, international development.</p>	<p>Cluster Marétique @marrer</p> <p>ccirezo-normandie.fr/maretique President: Michel GRENIER</p> <p>Supporting the development of marine and river companies by providing adapted digital solutions, through the creation of a space which provides information, the pooling of resources and skills, integration of diverse strategies, project development, etc.</p>
<p>Normandy Microelectronics Association</p> <p>normandy-micro.org President: Jean FERGON</p> <p>Building an ecosystem which encourages the development of the Normandy microelectronics industry through promotion and networking with players, skills and know-how with clients, financiers, economic developers, institutions and students.</p>	<p>Club TIC Normandie</p> <p>club-tic.fr President: David NAZE</p> <p>Coordinating and highlighting all digital players, developing the digital economy, collaborating with regional industries, identifying new markets, participating in economic development and the territory's influence through digital technology, connecting Upper and Lower Normandy's digital industries and developing synergies between players.</p>


 <p>Construction/Public works</p>	<p>Arcene</p> <p>www.arcene.fr President: Pascal LEMOINE</p> <p>Promoting activity and initiatives and encouraging the pooling of resources, sharing best practices and creating synergies between players who promote environmental quality in building, eco-construction and energy performance.</p>
 <p>Forestry</p> <p>Professions Bois</p> <p>professionsbois.com President: Christian PIQUET</p> <p>Sustainably developing the forestry industry and making it a major asset for regional economic momentum by developing the wood product offering, responding to the demand for market quality, reinforcing skills and making the industry a key feature for the improvement of our environment.</p>	<p>Anoribois</p> <p>anoribois.com President: Alain LEFEBVRE</p> <p>Encouraging the development and representation of forestry companies and jobs and ensuring the promotion of wood as a material and its development in construction in order to promote local resources.</p>

Theme	Competitiveness cluster
Industry	Area of excellence

Corporate networks

 <p>Industries/ Industrial subcontracting</p>	<p>Glass Vallée</p> <p>la-glass-vallee.com President: Valérie TELLIER</p> <p>Luxury glass and bottles industry: The leading international luxury bottles cluster, Glass Vallée represents an international network and unique know-how, allowing it to propose a global offer to the biggest names in perfumery, cosmetics and spirits, as part of the luxury 'Made in France' tradition.</p>
<p>Tech SAP Ouest</p> <p>www.techsapouest.com President: Michel JAMET</p> <p>Promoting technical innovation by encouraging coordination between players in personal, health and social services, therefore offering better services whilst promoting the regional territory.</p>	<p>Pôle Mécanique Sud Ndie</p> <p>www.flers.cci.fr President: Bernard MACARY</p> <p>Mechanics, metalwork and associated services: promoting regional know-how, developing an image of a high-performance industry, adapting resources between companies, promoting mechanical jobs amongst young people and providing training.</p>
<p>Normandie Habillement</p> <p>www.normandiehabillement.com President: Marc PRADAL</p> <p>Textiles-Clothing: promoting momentum, creativity and know-how of Lower Normandy companies and representing the textiles-clothing industry with the general public and policy makers.</p>	<p>Polymers Technologies</p> <p>www.polymerstechnologies.com President: Michel RAPEAUD</p> <p>Plastics manufacturing: offering companies the opportunities of technological cooperation, promoting their assets on the market, promoting their R&D options, accessing new markets and training in future needs.</p>
<p>Dieppe Méca Énergies</p> <p>dieppe-meca-energies.com President: Patrice GAULT</p> <p>Industrial subcontracting: covering a wide range of industrial and economic activities (public works, corporate services, electronics, mechanics, etc.), Dieppe Méca Énergies coordinates high-performance and dynamic companies and partners aiming to promote companies, synergy between members and support in their development.</p>	<p>Vialog</p> <p>vialog.fr President: Alain VERNA</p> <p>Industrial and logistics subcontracting: providing purchasers with various and complementary skills as part of complex subcontracting, production outsourcing, distribution logistics and upgrading projects.</p>

 <p>Industries/ Industrial subcontracting (continued)</p>	<p>AISCO</p> <p>cotentin-entreprendre.com/aisco.asp President: Éric VOISIN</p> <p>Industrial subcontracting: study, development, production and maintenance of industrial systems and equipment.</p> <p>Sotraban</p> <p>sotraban.com President: Gilles LECOMTE</p> <p>Industrial subcontracting: promoting regional know-how in terms of subcontracting (global offer from 60 manufacturers, purchaser-subcontractor relationship, joint approach when looking for new opportunities).</p>
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 <p>Art</p> <p>Villedieu Made</p> <p>www.villedieumade.org President: Martine SUTRE</p> <p>Promotion of the know-how and excellent products made by Pays de la Baie du Mont-Saint-Michel craftsmen to make them accessible to the general public.</p>	<p>Artisans d'Art de Normandie (AADN)</p> <p>artisanat-art.fr President: Daan KOERS</p> <p>Multi-disciplinary association with around fifty different roles based on French tradition and know-how, promoting craft-related jobs, exchanging best practices and pooling resources.</p>
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Theme	Competitiveness cluster
Industry	Area of excellence

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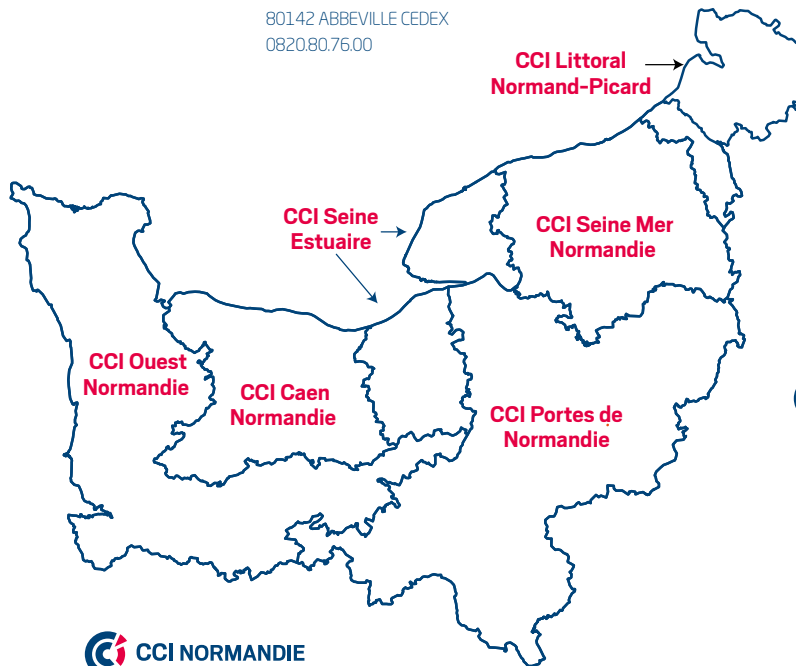
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