

BRETAGNE®

# THE BRETAGNE

# AGRIFOOD MAPS

2016 / 2018



# Bretagne's agrifood industry

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# Edito

## AGRIFOOD: AN INDUSTRY OF THE FUTURE

Agriculture and agrifood are and will remain major pillars of the Breton economy. Some see this Breton speciality as a source of vulnerability, taking the view that in the age of the Internet and the service economy, there are few prospects for the future of the food industry. Nothing could be further from the truth, as proven on a daily basis.

Like all business sectors, the agrifood industry has been shaken by the economic and financial crisis. This crisis was accompanied by a profound shift in this industry in Bretagne towards higher value-added processed products. Today, the Breton agrifood sector is once again turning its attention to a more offensive strategy for the future. Business volumes are rising, exports are up and investments are multiplying. And above all, job losses have ceased and a reversal could even be seen in this trend.

Far from an industry of the past, agrifood is one of the most innovative and rapidly evolving sectors. It is at the crossroads of digital technology, energy and robotics that the most fruitful innovations emerge. The Regional Council has long supported these, and will continue to do so to ensure that agrifood in Bretagne is at the leading edge of the economy of tomorrow.

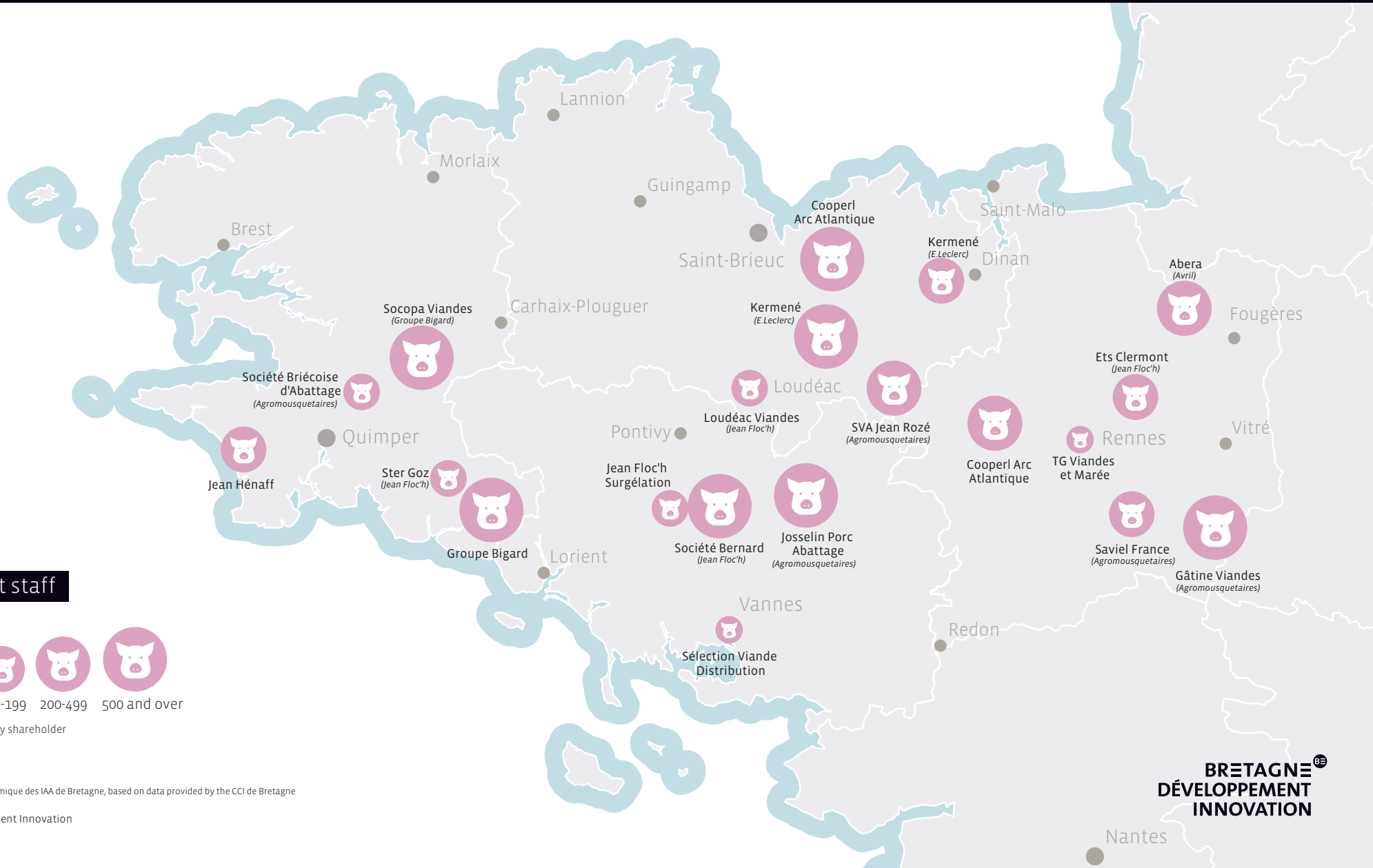
You have before you maps reflecting the dynamism of Breton agrifood, in all territories and all business sectors (meats, dairy products, fruit and vegetables, bakery products, fish products and ready meals). A source of pride for Bretons, and rightly so.

Welcome to Bretagne.

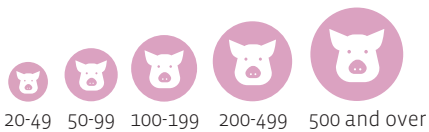
**Jean-Yves Le Drian**  
President of the Regional Council of Brittany

# 01/ PIG SLAUGHTERING AND PORK PROCESSING

Bretagne is France's most important pig slaughter and pork processing region, home to 58% of the country's abattoirs in 2015. As well as the tonnage slaughtered (in total more than 1.1 million tonnes), Breton manufacturers are increasing their efforts with regard to ensuring that the waste carcasses are "recycled", leading them to work on new markets. More than 80% of slaughtered pigs are cut up and new preparation premises for Consumer Sales Units (processed, raw, cured or cooked products) are developing to respond to the needs of French, European and world markets. More than one third of Breton slaughter uses tools taken from the retail sector.



/ Permanent staff

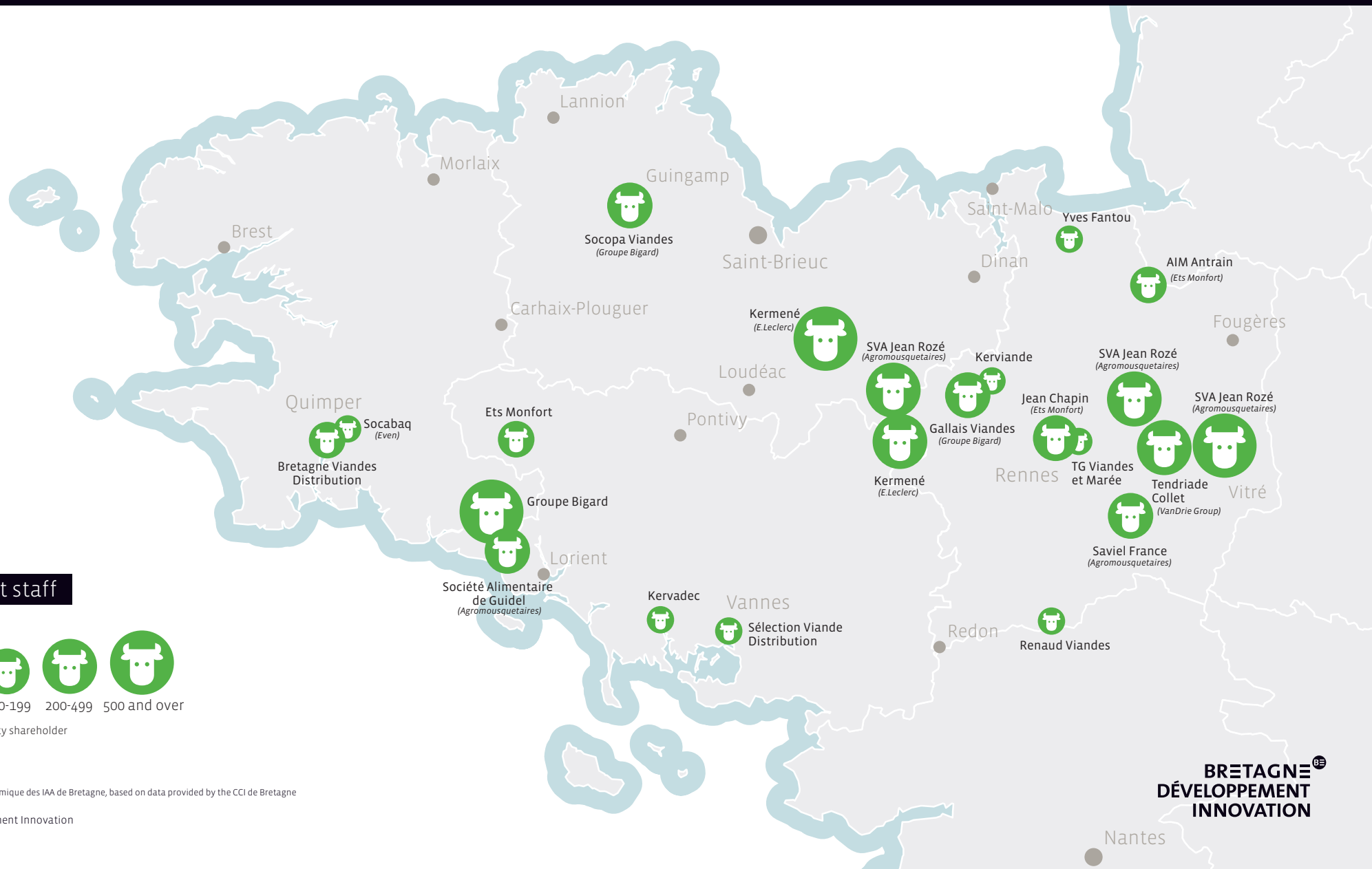


(Name of group): Majority shareholder

July 2016  
Sources: Observatoire économique des IAA de Bretagne, based on data provided by the CCI de Bretagne  
IGN - GEOFLA® and RGE®

# 02/ CATTLE SLAUGHTER AND PROCESSING

Bretagne has a network of modern beef slaughter and processing facilities that are based on diversified production primarily generated from three regions in the West. The region thus covers nearly 37% of national veal calf slaughters and 21% of adult bovine slaughters. The largest-scale product production, the rationalisation and modernisation of industrial tools remain priority areas for development and investment for these companies, which are often leaders in France.



/ Permanent staff



(Name of group): Majority shareholder

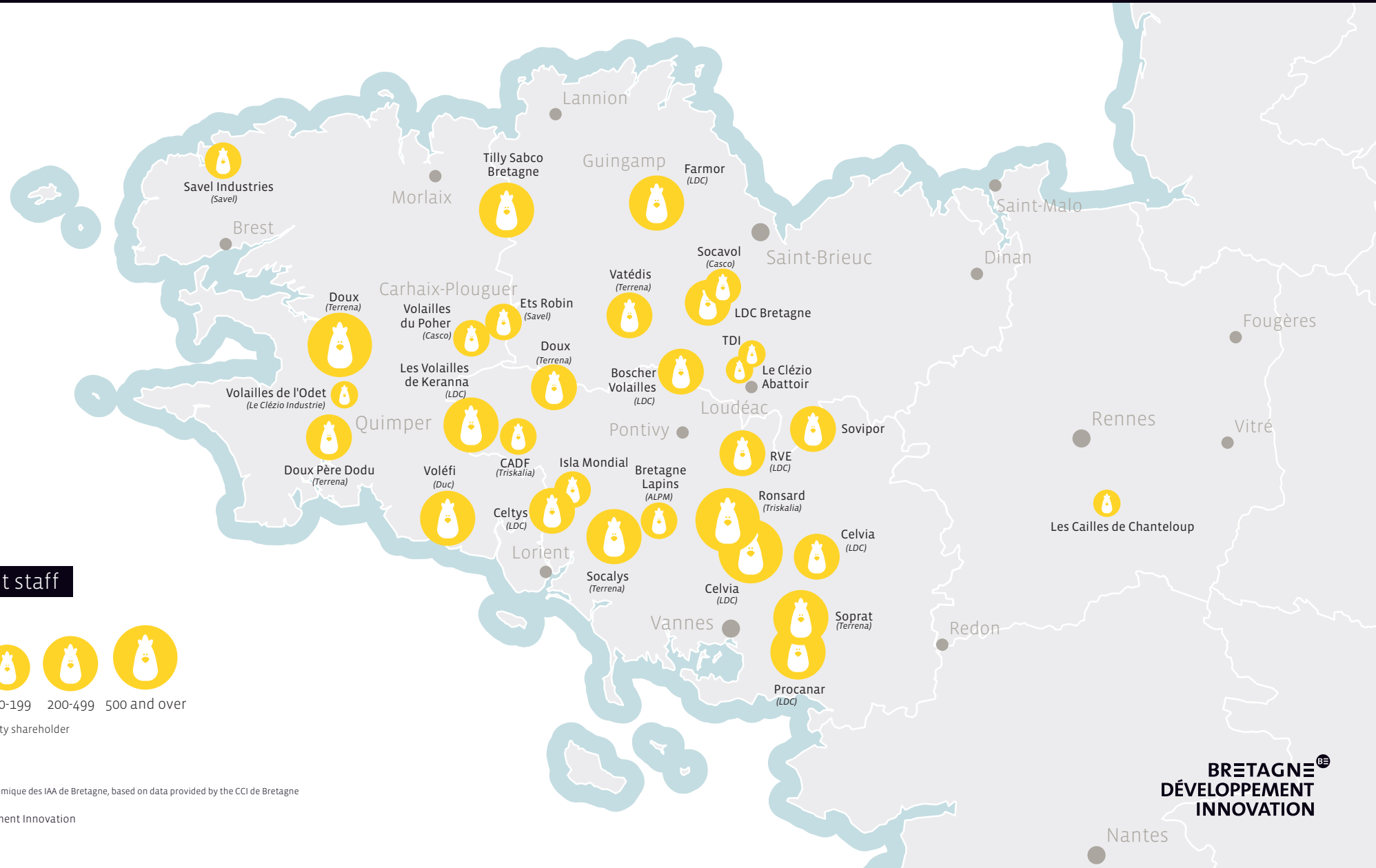
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Sources: Observatoire économique des IAA de Bretagne, based on data provided by the CCI de Bretagne  
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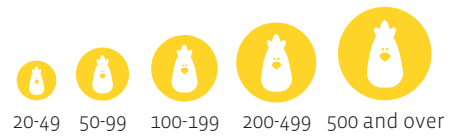
**BRETAGNE**  
**DÉVELOPPEMENT**  
**INNOVATION**

# 03/ POULTRY SLAUGHTER AND PROCESSING

For several decades now, poultry production in Bretagne has relied on the strong growth in consumption in France, Europe and third countries (Near and Middle East). However, since the late 1990s, production has declined as a result of heavy competition from imported meat in Europe (Brazil, Thailand, etc.) and more recently intra-European meats (Netherlands, Belgium, Germany, Poland). This decline is particularly marked in turkey, while chicken is less vulnerable. The frozen chicken export sector is also being challenged. Major industrial restructuring is currently under way. The Breton sector, which represented 32% of French chicken production and 46% of turkey meat production in 2015, still has a variety of companies, products and markets, which could allow it to bounce back in an every expanding French and European market.



/ Permanent staff

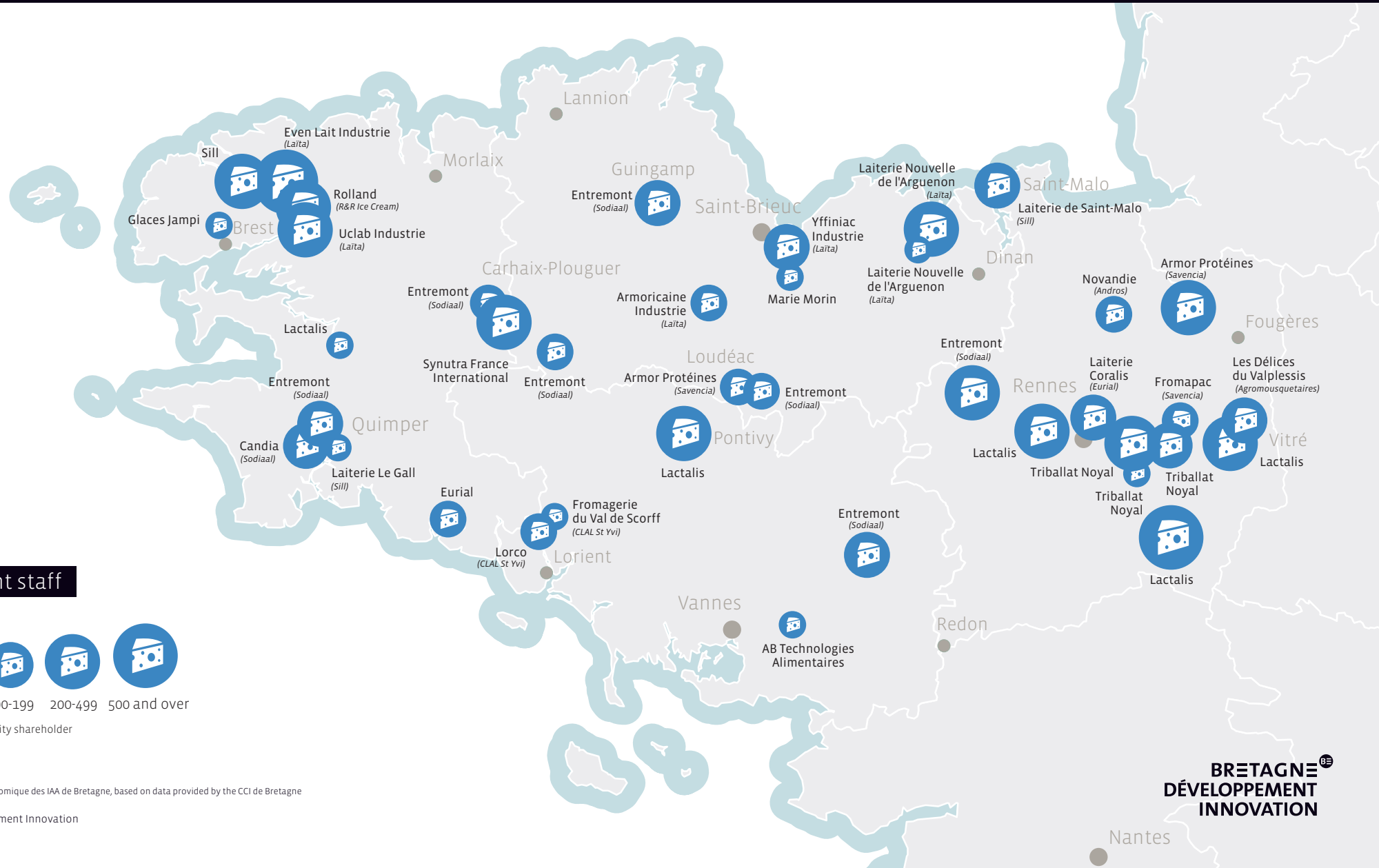


(Name of group): Majority shareholder

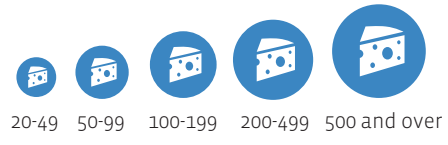
July 2016  
 Sources: Observatoire économique des IAA de Bretagne, based on data provided by the CCI de Bretagne  
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# 04/ DAIRY INDUSTRY

Ensuring almost 22% of France's milk shipments, Bretagne remains an attractive region for international industrial operators as well as for the majority of Breton cooperatives. At a time when market regulations are changing significantly (end of quotas in 2015...), companies have begun a process of concentration within the sector to adapt to tougher competition. Substantial investments have been in operation since 2015.



/ Permanent staff



(Name of group): Majority shareholder

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 Sources: Observatoire économique des IAA de Bretagne, based on data provided by the CCI de Bretagne  
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# 05/ ANIMAL FEED

In Bretagne, developments made in the production of food for animals (compound feed, premixes and pet food) followed progress made in the domain of livestock production. With almost 8.2 million tonnes produced (excluding pet food) in 2013 alone, Bretagne is responsible for almost 42% of the national production of animal feed.

The investments made in facilities primarily aim to increase their productivity, food safety (heat treated foods) and the traceability of products while responding to increased market segmentation when it comes to food products (100% vegetable-based feed, GMO-free sector, etc.). The development of products of a higher added value (premixes, fish food, horse food, etc.) is another much pursued area.



/ Permanent staff



July 2016  
 Sources: Observatoire économique des IAA de Bretagne, based on data provided by the CCI de Bretagne  
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# 06/ PORK-BASED COOKED MEATS, SALT MEATS AND CANNED MEATS

A traditional activity in Bretagne, cooked, salt and canned pork meat products are continuing to be developed and totalled almost 386,000 tonnes in 2015 (excluding ready meals and pre-made salads), which is namely 32% of national production. Alongside products such as roast hams and pâtés (a third of national production), a recent and strong trend can be seen in the production of lardons and roasted products essentially created for supermarket deli counters.



/ Permanent staff



20-49 50-99 100-199 200-499 500 and over

(\*) The manufacture of cooked meats is not the site's only activity.

July 2016  
Sources: Observatoire économique des IAA de Bretagne, based on data provided by the CCI de Bretagne  
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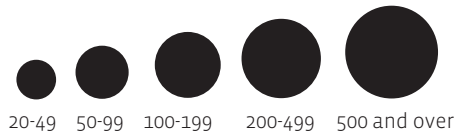
# 07/ READY MEALS AND READY-MADE PRODUCTS

Responding to the growing demand of the market, this sector is seeing a huge increase in the number of companies manufacturing products that are increasingly sophisticated with regard to their content or packaging. These meat, fish or vegetable-based prepared products are sold both fresh and frozen. This activity, most often the result of a diversification effort, aiming to complete a range of existing products, is becoming a source of growth and value added for many Breton agrifood businesses.



/ Permanent staff

- Ready meals and ready-made products
- Specialties made from seafood products



(\*) The ready-made meal is not the site's only activity.

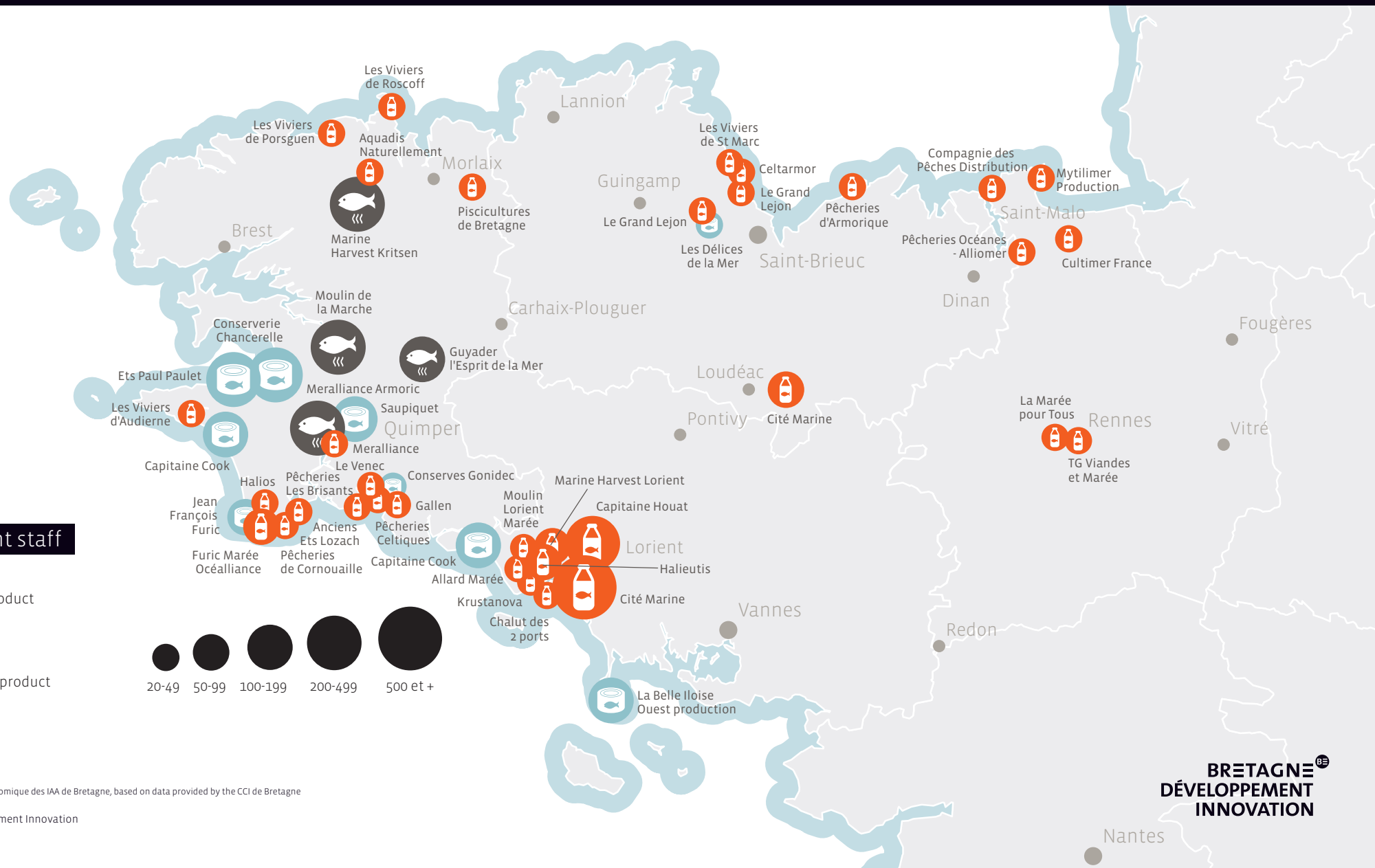
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**BRETAGNE**  
**DÉVELOPPEMENT**  
**INNOVATION**

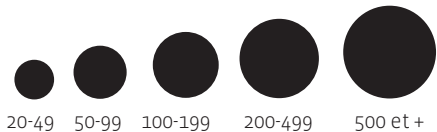
# 08/ PROCESSED AND CANNED SEAFOOD PRODUCTS

Closely associated with the image of Bretagne, seafood products are the basis of numerous technological and culinary innovations. As well as the sale of fresh and frozen fish products (208,000 tonnes and a turnover of €353M in 2013), Bretagne is the most important region in France when it comes to the fish trade, generating 34% of France's total turnover in this domain. Bretagne is also the country's biggest seafood processing region (34% of France's total turnover for processing in 2013), with, most importantly, the speciality of producing canned seafood products. The production of smoked salmon, smoked fish products, and ready meals and ready-made products made from seafood are also very common activities, often carried out by specialist companies. Foreign investors figure prominently and are increasingly active, particularly in the fishing sector.



/ Permanent staff

-  Canned product
-  Fumaison
-  Processed product



July 2016  
Sources: Observatoire économique des IAA de Bretagne, based on data provided by the CCI de Bretagne  
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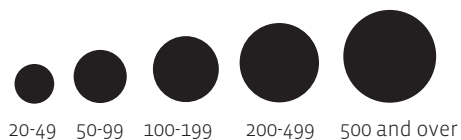
# 09/ PROCESSING AND MARKETING OF FRUIT AND VEGETABLES

Bretagne's vegetable production is essentially destined for the fresh market in France, but also in Europe. Nationally, Bretagne is in first place in the production of cauliflowers, new potatoes, tomatoes and artichokes. In addition to this, an area of approximately 20,000 hectares of land is sown every year for the production of processed vegetables by around twenty businesses owned by a number of big European companies. Essentially available as canned or frozen products, new products are tending to turn to mixtures of vegetables and production methods that are in line with new consumption practices.



/ Permanent staff

- Industry
- Commerce



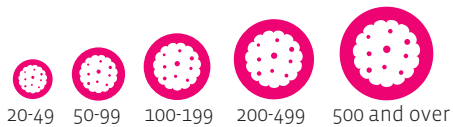
July 2016  
Sources: Observatoire économique des IAA de Bretagne, based on data provided by the CCI de Bretagne  
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# 10/ BREAD, CAKES AND PASTRIES, AND BISCUITS

With a regional turnover of over 1 billion euros, Bretagne's bread, cakes and pastries, and biscuits sector is responsible for almost 6% of the national turnover. With more than sixty businesses with more than 20 employees, this sector produces a very diverse range of products, from regional specialities (for example galettes – round flat cakes, crêpes – typical Breton pancake, and butter cakes) to upscale fresh and frozen cakes and pastries. In this sector, for the most part composed of SMEs or even TPEs, the most significant developments in the past few years concern regional groups forming associations between several production units, as well as the presence of foreign capital.



/ Permanent staff



July 2016  
Sources: Observatoire économique des IAA de Bretagne, based on data provided by the CCI de Bretagne  
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# 11/ BEVERAGES

The emblematic drink of Bretagne, cider is the sector's main production in the region. This product is associated with an image of authenticity and quality. It is produced by SMEs in the cooperative sector for the largest, and by craft businesses for the rest, which process their own apple production but also that of numerous farmers and agricultural operators who sell their farm-produced cider directly. Bretagne has also succeeded in making its local beers a speciality: the sector is composed of independent breweries on a regional scale working alongside numerous craft breweries and microbreweries. In addition, the region has several mineral and natural water sources.



/ Permanent staff

- Beers
- Distilled beverages
- Carbonated beverages
- Ciders
- Water
- Fruit juice

(\*) The manufacture of fruit juice is not the site's only activity.



# 12/ INTERMEDIATE FOOD PRODUCTS

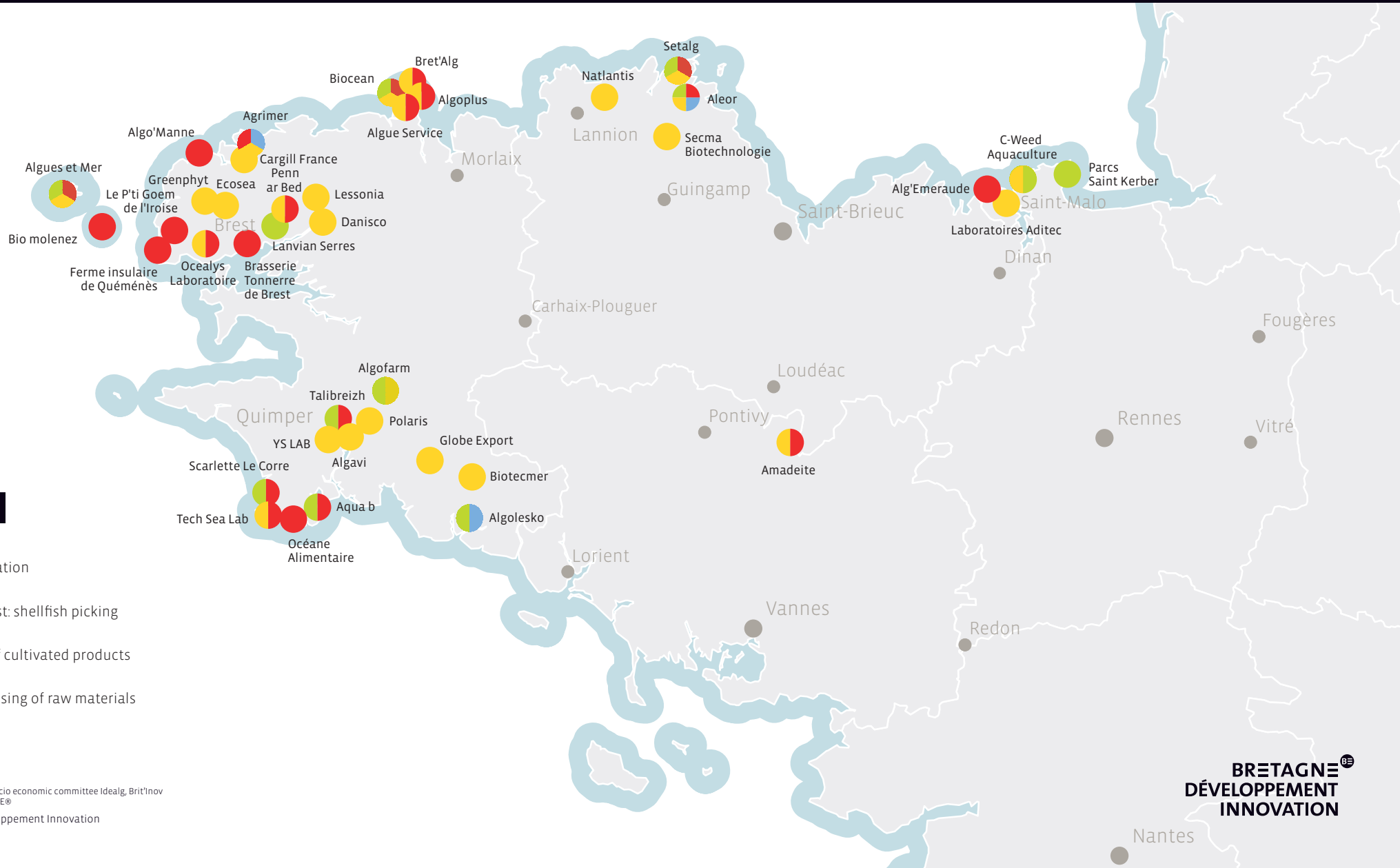
Products which have initially undergone industrial processing at least once, IFPs are designed to be incorporated in the production of a final food product. Complementing the basic raw ingredients used, they are chosen by IAAs (agribusinesses and agrifood industries) for their specific functional (binding, giving texture, adding taste, etc.) or nutritional properties. In Bretagne, companies specialising in the production of IFPs (colouring, alginates, animal proteins, etc.) often work closely with companies in the dairy (casein, caseinate), animal feed (service companies), meat and egg sectors.



# 13/ RAW SEAWEED MATERIALS

Ranked 10<sup>th</sup> in the world, the production of seaweed in Bretagne (90% of the total volume in France) is for the most part carried out by wrack gathering boats (65,000 tonnes), harvesters on foot (6,000 tonnes) and aquaculture (120 tonnes) which shows high growth potential. A wide variety of seaweed species are naturally found on the coast of Bretagne and are used in food products, cosmetics, health and agricultural as well as in the production of biomaterials.

The collective actions of the Breizh'alg programme run by the Brittany Region support the sustainable development of algal biomass of economic interest in Bretagne and promote the processing of this resource in order to target different markets.

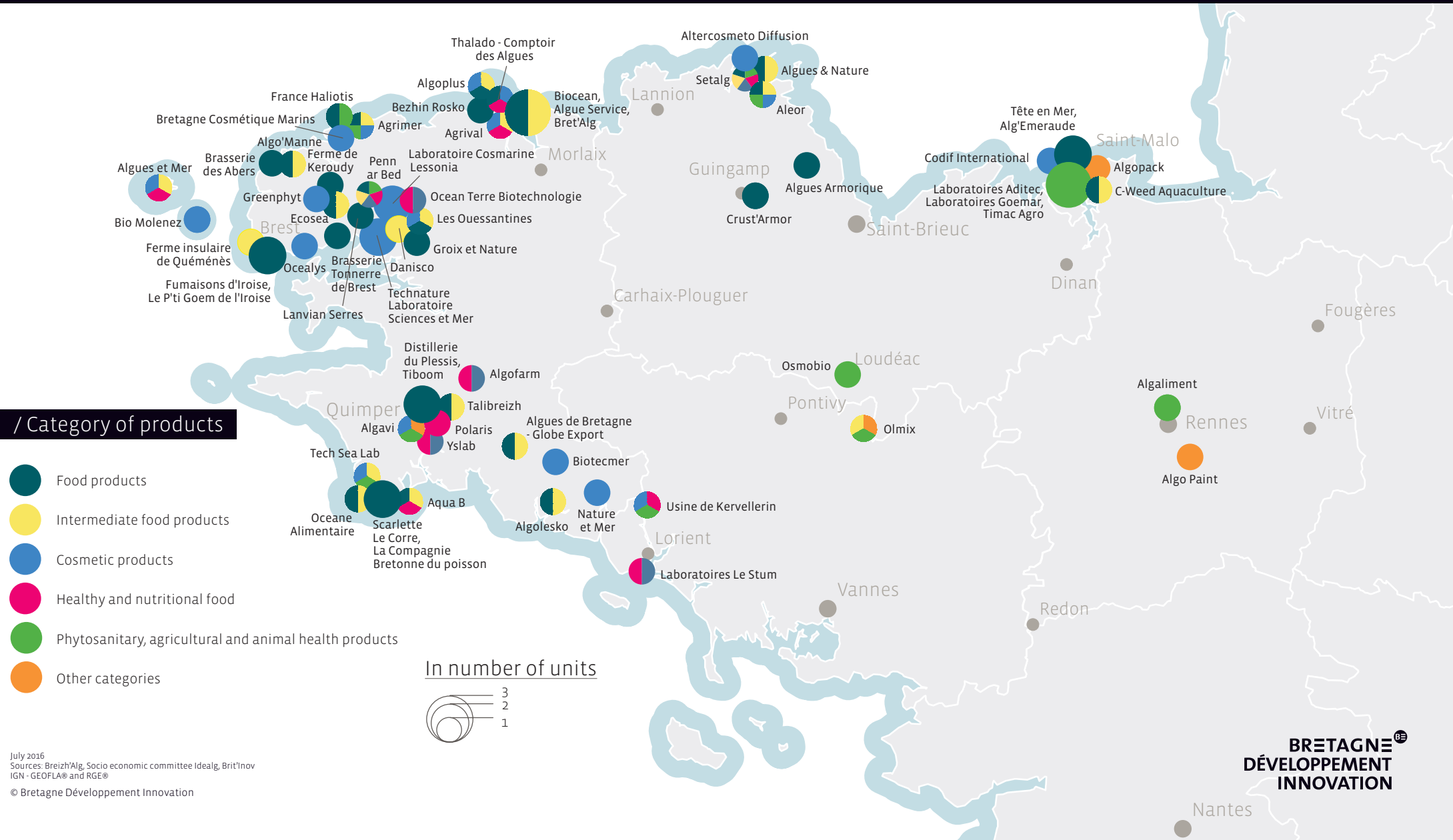


## / Stages

- Cultivation
- Harvest: shellfish picking
- Sale of cultivated products
- Processing of raw materials

# 14/ SEAWEED PROCESSING

17 producers generally carry out the initial processing (drying) and then create several finished products. 40 different processing companies create agrifood, nutritional, cosmetic, phytosanitary, animal health-related and agricultural products, among others.



July 2016  
Sources: Breizh'Alg, Socio economic committee Idealg, Brit'Inov  
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# 15/ BIOTECHNOLOGY IN THE AGRICULTURE AND AGRIFOOD SECTORS

French and European leader in agriculture and agri-food sector, Bretagne has become a key player in the field of agro-biotechnology. Faced with the growth in plant production, livestock farming and fishing, Bretagne has created companies specialised in the processing and recycling of raw materials. As such, more than 150 companies have incorporated biotechnology-related techniques at industrial level. Supported by the Valorial innovation cluster, the Adria Développement, ZOOPOLE Développement, CBB Capbiotek, Vegenov, IDMer and CEVA technical centres, as well as the INRA institutes and the ANSES laboratories, powerful actors in the public domain, Bretagne has all of the assets needed to incorporate biotechnologies into its processing methods. Discover the interactive map at [www.capbiotek.fr](http://www.capbiotek.fr).



# 16/ THE MAIN AGRIFOOD BUSINESSES WITH HEADQUARTERS BASES IN BRETAGNE

Bretagne is home to a large number of agrifood businesses whose headquarters are based in the region, some of which are major international companies. Though all of the aforementioned areas of activity are present, decision-making centres in Bretagne in particular concern businesses in the animal sector (pork, cattle, animal feed and versatile companies), most often with family or cooperative-owned capital.

/ Activity and turnover (in millions of euros)



July 2016  
Sources: Observatoire économique des IAA de Bretagne, based on data provided by the CCI de Bretagne  
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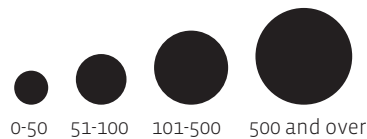


# 17/ INTERNATIONAL INVESTMENT IN THE AGRIFOOD SECTOR IN BRETAGNE

127 sites, about 10 000 jobs, 22 nationalities (please refer to the back of this map for companies' names). Data are extracted from the regional observatory on international investment, ran by Bretagne Commerce International. The methodology used is the following: a foreign investor must have acquired directly at least 10% of the share capital of company located in Bretagne. The Breton entity has to be registered under a business identification (SIRET) number.

/ Nationality of the shareholder and staff numbers

-  Germany
-  Saudi Arabia
-  Austria
-  Belgium
-  Canada
-  China
-  Denmark
-  Spain
-  USA
-  Ireland
-  Iceland
-  Israel
-  Italy
-  Japan
-  Lithuania
-  Luxembourg
-  Norway
-  Netherlands
-  United Kingdom
-  Russia
-  Switzerland
-  Thailand



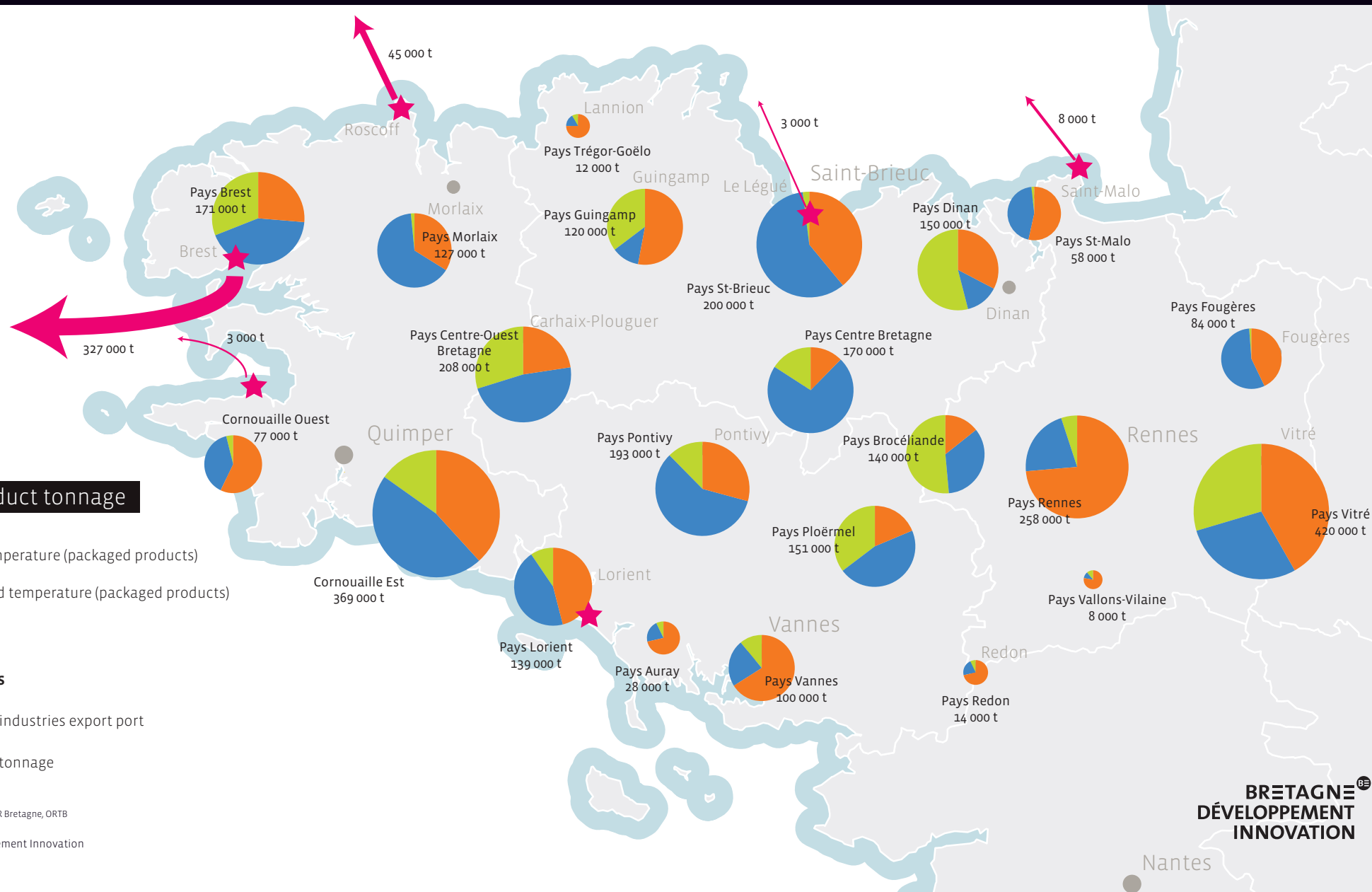


# INTERNATIONAL INVESTMENT IN THE AGRIFOOD SECTOR IN BRETAGNE

1 Acemo	33 Danbred International France	65 Hema	97 Néolait
2 ACO funki france	34 Danisco	66 Houdebine	98 Nestlé Purina Pet Care
3 A.M2.C	35 Davigel	67 Houdebine	99 Panavi
4 Aquativ	36 Diana Naturals	68 Hy Line France	100 Panavi
5 Ardo	37 Diana Naturals	69 I.S.A	101 Panavi
6 Armor Inox	38 Doux	70 Keenan France	102 Patisfrance
7 Armor Protéines	39 Doux Aliments Bretagne	71 Kervalis	103 Piment Vert
8 Armor Protéines	40 Doux Aliments Bretagne	72 Kervalis	104 Provimi France
9 Aviagen Tu rkeys France	41 Doux Père Dodu	73 KF Bretagne	105 RMH France
10 Biocéval	42 Dujardin Bretagne	74 Krustanord	106 Rolland
11 Biomin France	43 Etablissements Doussot / La Palourdière	75 La Houle	107 Royal Canin France
12 Biscuiterie Le Glazik	44 Etablissements Paul Paulet	76 Laboratoires Goëmar	108 S.F.P.A
13 Blin	45 Etablissements Pierre Leseur	77 Larzul	109 Saupiquet
14 Brake France Service	46 Etablissements Pierre Leseur	78 Le Confetti Gourmand	110 Schippers France
15 Bretagne Express	47 Etalon France	79 Lely France	111 Sea Value Atlantic
16 BWC Europe Distribution	48 Fancom	80 Lightbody Europe	112 SNC Lavalin Boplan Ingenierie
17 Calcialiment	49 Fountain Ouest	81 Litfert	113 Soprat
18 Cap Solutions Culinaires	50 Fountain Ouest	82 Makfroid	114 Sovapaac
19 Cargill France	51 France Boissons	83 Makfroid	115 AAEE
20 Cargill France	52 France Boissons	84 Makimpex	116 SPF Diana
21 Cargill France	53 France Boissons	85 Makurazaki France Katsuobushi	117 Stanven
22 Casco	54 France Boissons	86 Marel France	118 STÉ Protéines Industrielles
23 Le Roux Chocolatier - Caramelier	55 France Boissons	87 Marine Harvest Kritsen	119 Synutra
24 Le Roux Chocolatier - Caramelier	56 France Boissons	88 Marine Harvest Kritsen	120 Tendriade-Collet
25 Choice Genetics France	57 France Boissons	89 Marine Harvest Kritsen	121 Tilly Sabco Bretagne
26 Cité Marine	58 Fromapac	90 Mayekawa	122 Trouw
27 Cité Marine	59 Gartal Maréval	91 Meralliance	123 Valab
28 Cocked Hat Farm Foods Limited	60 Global Nutrition International	92 Meralliance Logistique	124 Valoroeuf
29 Combicut	61 Greencap	93 Meyn France	125 Vapran
30 Compagnie des Pêches de Saint-Malo	62 Grelier	94 Monsanto	126 Vorwerk Thermomix
31 Compagnie Générale de Surgélation	63 Groupe Doux	95 MPS France	127 World Dairy Ingredients
32 Couvoir Le Sayec	64 Haarslev Industries / Sil	96 Néolait	

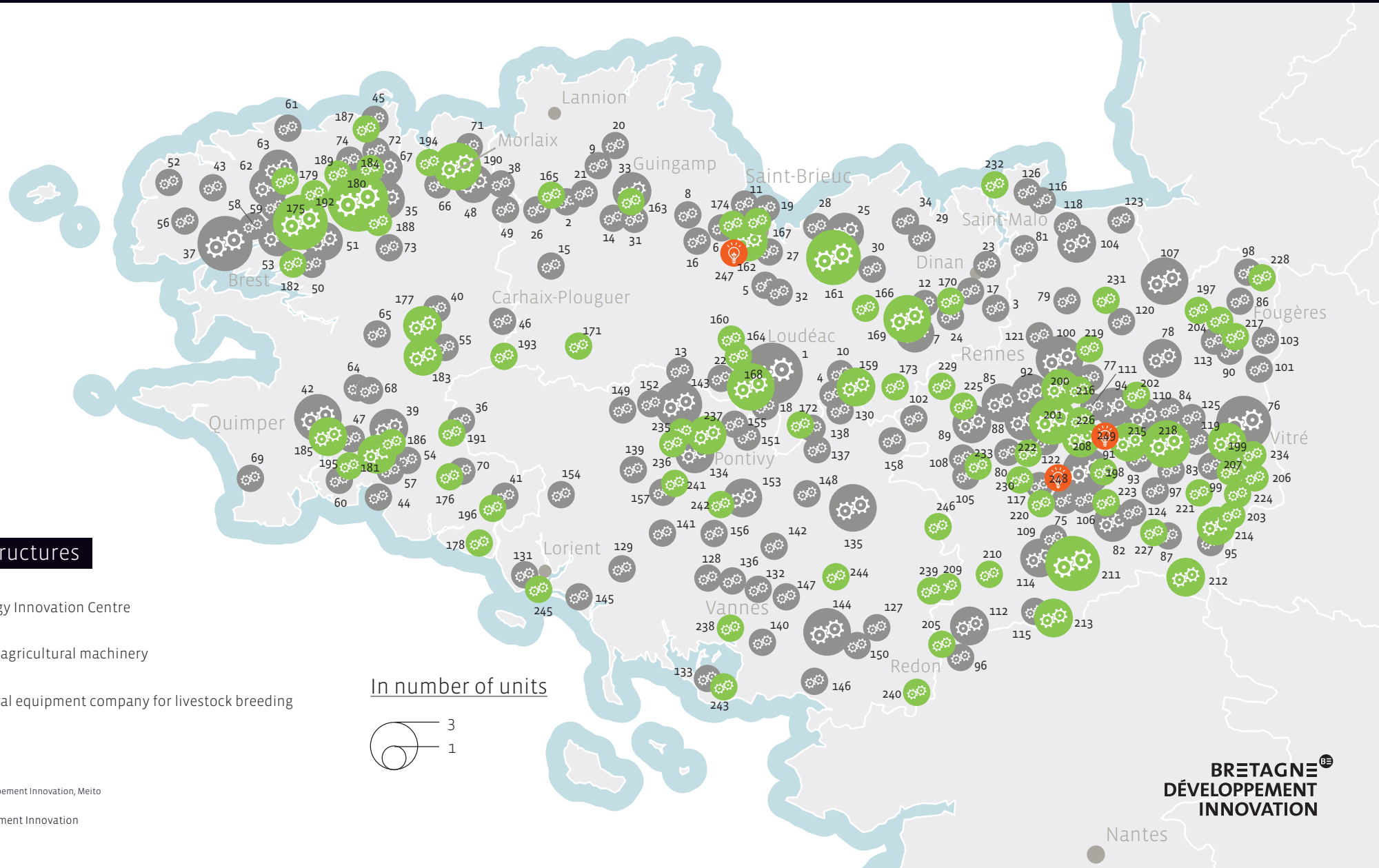
# 18/ OUTGOING LOGISTICAL FOOD PRODUCTS FLOWS IN BRETAGNE

Agrifood industries represent 44% of Bretagne's national outgoing flows (8.7 million out of 19.7 million tonnes for all types of products combined). More than 95% of these flows are transported via road, while the rest are primarily covered by maritime transport (400,000 tonnes via Breton ports). Combined road and rail transport and air transport account for a marginal proportion of flows (less than 10,000 tonnes via Rennes Airport). The flows shown on this map were generated by cross-referencing data from the SITRAM database (flows by type of product and trailer) with the Bretagne CCI Business file, and by grouping the data by country. The activity is fairly evenly distribute across the territory, except in the South-East. On the other hand, dry and bulk activity are largely located in the East of the region, whereas the production of temperature controlled products is mainly found in the West.



# 19/ AGRICULTURAL MACHINERY

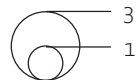
A major French agricultural region, Bretagne is home to a large number of agricultural machinery companies evenly spread over the territory. These are divided into two main categories: agricultural machinery and agricultural equipment for livestock breeding. New technologies, digital technology, robotised automation and big data play an increasingly important role in these innovative companies in order to meet the enormous challenges of competitiveness in these sectors.



## / Type of structures

-  Technology Innovation Centre
-  Company agricultural machinery
-  Agricultural equipment company for livestock breeding

In number of units

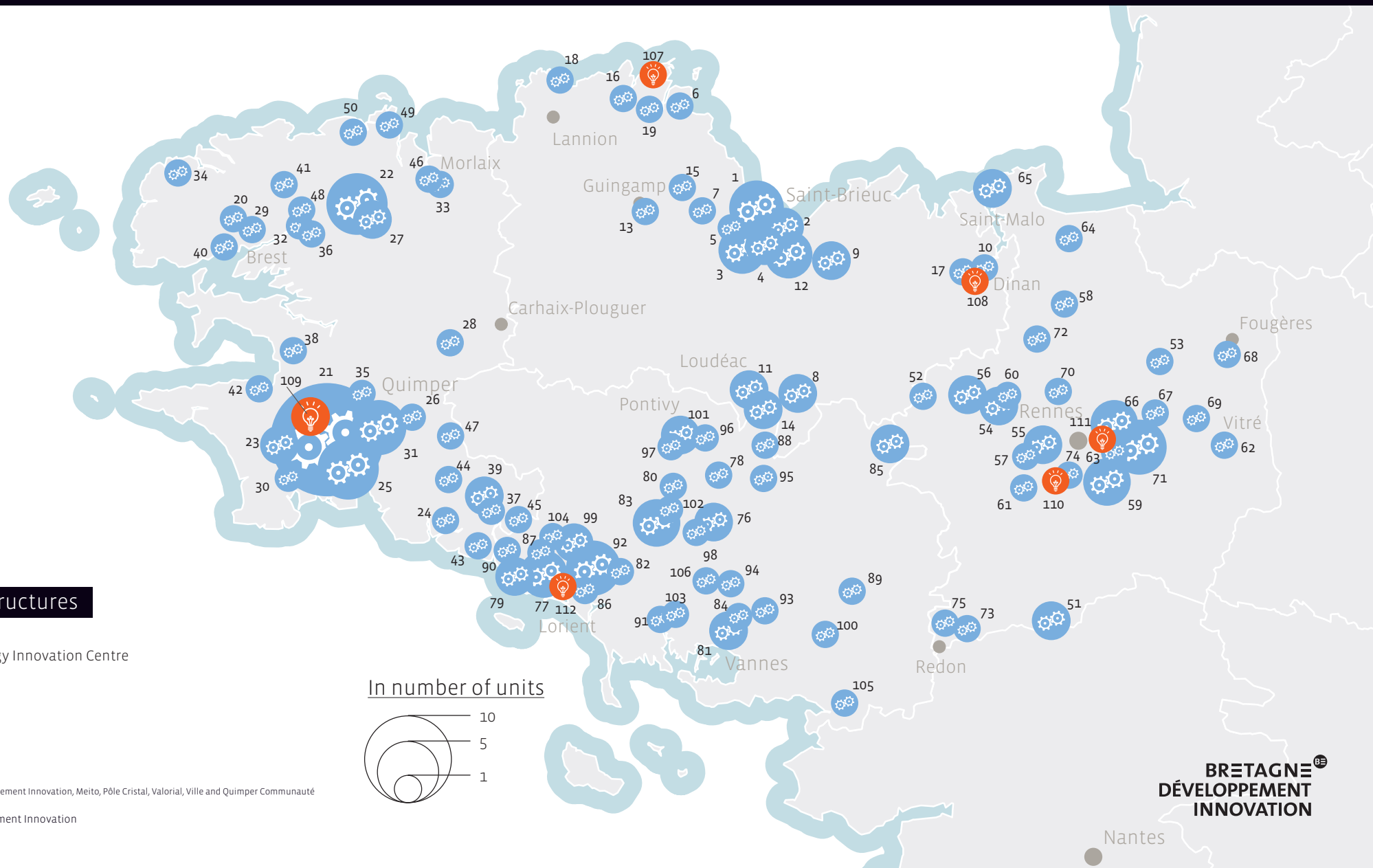




# 20/ AGRIFOOD EQUIPMENT MANUFACTURERS IN BRETAGNE

Agrifood facilities increasingly incorporate new technologies, whether digital technology, robotised automation or big data.

Bretagne, France's leading agrifood region, is thus home to over one hundred equipment manufacturers that develop these technologies at regional level and for export.

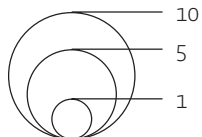


## / Type of structures

 Technology Innovation Centre

 Company

## In number of units



# AGRIFOOD EQUIPMENT MANUFACTURERS IN BRETAGNE

## COMPANIES

01 A A Z Pesage-Tardivel, Armor Ventilation See Gergaud, JF Cesbron, Ventil Ouest - PLERIN - 22	28 Balpe - LANDELEAU - 29	55 APIA Transitube, Spie Ouest Centre - LE RHEU - 35	82 Arbor Technologies - LANDEVANT - 56
02 A.C.G.S. Mesure, S.B.R. - HILLION - 22	29 BPS Métrologie - GUIPAVAS - 29	56 B C Inox, Axima Réfrigération - MONTAUBAN-DE-BRETAGNE - 35	83 Arial, Chaudronnerie Le Drogo, Marel France - BAUD - 56
03 Agrocept Ingénierie, Le Bozec - Technic Froid, Ovoconcept - PLOUFRAGAN - 22	30 Bretagne Anti-Adhérence - PLOMELIN - 29	57 Ba Systemes - MORDELLES - 35	84 Arinox - SAINT-AVE - 56
04 Agrotech, Poly Concept Inox - TREGUEUX - 22	31 C.T.S., Ecma, Larvol, Novimetal - ERGUE-GABERIC - 29	58 Biomérioux - COMBOURG - 35	85 Armor Inox, Armor Inox Production - MAURON - 56
05 Armor Précision Meca - TREMUSON - 22	32 Chaudronnerie Jean Autret - LANDERNEAU - 29	59 Bizerba Luceo, Let Services, Pesage Industriel de l'Ouest - VERN-SUR-SEICHE - 35	86 Ate - MERLEVEZEN - 56
06 Artbois - PAIMPOL - 22	33 Eiffage Energie - MORLAIX - 29	60 Brenor 35 - PLEUMELEUC - 35	87 Becam - LANESTER - 56
07 Atelier des Landes - PLELO - 22	34 ETT - PLOUDALMEZEAU - 29	61 BTCI - Entreprise Bretonne de Tuyauterie et Chaudronnerie Inox - GOVEN - 35	88 Bretim - BREHAN - 56
08 Biralux Distribution, Couédic Madoré Equipement - PLEMET - 22	35 Fillpack - BRIEC - 29	62 Diatec - VITRE - 35	89 Britek - PLEUCADEUC - 56
09 Chauffage Industriel, Mayekawa - LAMBALLE - 22	36 Freeze Agro Ingénierie - PENCRAN - 29	63 EMO - NOYAL-SUR-VILAINE - 35	90 E.R.T.A. - Etudes Réalisations Thermiques Aérauliques - GUIDEL - 56
10 Dynalec - TADEN - 22	37 Guel't - QUIMPERLE - 29	64 EMP Rotomoulage - DOL-DE-BRETAGNE - 35	91 Electro Standard - AURAY - 56
11 Food Processing Equipment (Kaufler & SMO International), Segiza - LOUDEAC - 22	38 Guy Treanton - PLOMODIERN - 29	65 Etiq Conserves, Gedouin Ingenierie - SAINT-MALO - 35	92 Fabrication Industrielle de Machines et d'Equipements, Krepelek, SDTN, SO.DI-Avi - KERVIGNAC - 56
12 IMAP Armor, Ingeniering Machines Speciales Tregor, Pactisoud - YFFINIAC - 22	39 Ijinus, West-Arc - MELLAC - 29	66 Actemium, Gelec, OET - Ouest Electro Technique - CESSON-SEVIGNE - 35	93 Food Technology France - SAINT-NOLFF - 56
13 Mecarmor Blanchard - PLOUMAGOAR - 22	40 JF Cesbron - BREST - 29	67 Guillery Syf - LA BOUEXIERE - 35	94 G+ Technologies - LOCQUeltas - 56
14 MIIL - Montage Installation Industrielle Loudéacienne, SCAM - Société de construction et d'assemblage métallique - SAINT-BARNABE - 22	41 Le Lez Process - PLOUDANIEL - 29	68 H2M Technologies - JAVENE - 35	95 Geothermik - PLEUGRIFRET - 56
15 OSM - Ouest Services Maintenance - GOUDELIN - 22	42 Lef Industries - DOUARNENEZ - 29	69 IDpack - VAL-D'IZE - 35	96 Hydroclean - NOYAL-PONTIVY - 56
16 Scaaf - TREGUIER - 22	43 LTB - CLOHARS-CARNOET - 29	70 JF Cesbron - LA MEZIERE - 35	97 Le Garrec Entreprise - LE SOURN - 56
17 Soca-Froid - QUEVERT - 22	44 Penn - BANNALEC - 29	71 M.S. Industrie, Merand Mecapate, Palamatic France, Société d'exploitation Merand - BRECE - 35	98 Le Goff - PLUMELIN - 56
18 Syneric Industries - PERROS-GUIREC - 22	45 Prima Daniel - REDENE - 29	72 Sanden Manufacturing Europe - TINTENIAC - 35	99 M.C.T.I., SOBRA - HENNEBONT - 56
19 Thereco - PLEUDANIEL - 22	46 Probia Ingénierie - SAINT-MARTIN-DES-CHAMPS - 29	73 SCFO - Société de Climatisation et Froid Ouest - SAINTE-MARIE - 35	100 Meyn France - QUESTEMBERT - 56
20 A Therm - GOUESNOU - 29	47 SARAF - SCAER - 29	74 Schneider Electric - CHARTRES-DE-BRETAGNE - 35	101 Ouest Automatisation, Pontivy Froid - PONTIVY - 56
21 A.M2.C, BPS Métrologie, Capic, Eams Industrie, Force Mer, Froid Guyader, Hema, Jean-Marc Gainche, Lima, Mat'Agro, Mécanique Chaudronnerie de L'Atlantique, Mecaconcepts, Ouest Inox, Secma Cabon, Solsin, TzC, Traceconnect - QUIMPER - 29	48 Societe Guillou Freres - PLOUEDERN - 29	75 Sofiac Couedic Madore - BAINS-SUR-OUST - 35	102 S.B.A.I. - GUENIN - 56
22 AB Process Ingenierie, Axima Réfrigération, Coaxial Technologie, ECAT, Fournil-Labo-Service - LANDIVISIAU - 29	49 Spie Ouest Centre - SAINT-POL-DE-LEON - 29	76 x A.C.T.I.L., ID Automatismes - LOCMINE - 56	103 Sietar et Vti - PLUNERET - 56
23 Abscisse, Krampouz - PLUGUFFAN - 29	50 Techni Pac - CLEDER - 29	77 x A.E.F. Atelier Etude Fabrication, Haarslev Industries, Syleps - LORIENT - 56	104 SLCE - Société Iorientaise de construction électromécanique - CAUDAN - 56
24 Acmg Goalabre - RIEC-SUR-BELON - 29	51 ACP System, Ferotec France - GRAND-FOUGERAY - 35	78 x Agro Maintenance Systeme - NAIZIN - 56	105 Société de Matériel Alimentaire - ARZAL - 56
25 AEI - Automatismes Electricité Industrielle, Comea Process (ERPA), Emballage Technologies, Secma, Siminox - SAINT-EVARZEC - 29	52 Alain Leray - Maintenance Industrie - SAINT-MEEN-LE-GRAND - 35	79 x Alvey Samovie, Syleps - Sedep - PLOEMEUR - 56	106 STACEM - GRAND-CHAMP - 56
26 x AERA - CORAY - 29	53 Alfa Laval Agri - Etablissements Lefort - MEZIERES-SUR-COUESNON - 35	80 x André Daniel - PLUMELIAU - 56	
27 x Agro Alimentaire Système, SERMA - Société Entretien Réparation Matériel - LAMPAUL-GUIMILIAU - 29	54 AOC - Air Ouest Climatisation, Clauger - BEDEE - 35	81 x Apsis Technologies, Ouest Matic - VANNES - 56	

## TECHNOLOGY INNOVATION CENTRES

106 CEVA - PLEUBIAN - 22	109 Adria Développement, Breizpack - QUIMPER - 29	111 Meito - CESSON-SEVIGNE - 35
108 Pôle Cristal - DINAN - 22	110 Institut Maupertuis - BRUZ - 35	112 ID Mer - LORIENT - 56



# 21/ UNIVERSITIES, RESEARCH AND TRANSFER CENTRES

Bretagne is endowed with an extensive network of schools, basic or applied research centres and technology transfer centres. Partner of Breton companies, within the framework of the "Valorial" innovation cluster and Act Food Bretagne, federation of 5 Brittany technical centres (Adria Développement, CEVA, IDmer, Vegenov and Zoopôle Développement), this network contributes to the development of new products and manufacturing processes and puts its skills to good use for the benefit of agrifood industries engaging in research and development programmes.



July 2016  
Sources: Université Bretagne Loire, Bretagne Développement Innovation  
IGN - GEOFLA® and RGC®

# RESEARCH TEAMS WITHIN THE FOOD INDUSTRY SECTOR

01 Analysis of Residues and Contaminants	ANSES Fougères	FOUGÈRES
02 Antibiotics, Biocides, Residues and Resistance	ANSES Fougères	FOUGÈRES
03 Toxicology of Contaminants	ANSES Fougères	FOUGÈRES
04 Nematology Unit (plant parasites - Rennes)	ANSES Angers	LE RHEU
05 IGEPP - Institute of genetics, environment and plant protection	INRA - Agrocampus Ouest - Université de Rennes 1	LE RHEU
06 Bio-processes and bio-molecules Material engineering of Bretagne	Université de Bretagne Sud - The Saint-Cyr Military Academy Université de Bretagne Occidentale	LORIENT - VANNES
07 Regulated diseases of fish	ANSES Ploufragan / Plouzané	PLOUFRAGAN
08 Virology, immunology and parasitology in poultry and rabbits	ANSES Ploufragan / Plouzané	PLOUFRAGAN
09 Epidemiology and welfare in pigs	ANSES Ploufragan / Plouzané	PLOUFRAGAN
10 Epidemiology and welfare in poultry and rabbit farming	ANSES Ploufragan / Plouzané	PLOUFRAGAN
11 Viral genetics and biosafety	ANSES Ploufragan / Plouzané	PLOUFRAGAN
12 Hygiene and quality of poultry and pig products	ANSES Ploufragan / Plouzané	PLOUFRAGAN
13 Mycoplasmaology – bacteriology	ANSES Ploufragan / Plouzané	PLOUFRAGAN
14 Pig immunology and virology	ANSES Ploufragan / Plouzané	PLOUFRAGAN
15 University Laboratory for Biodiversity and Microbial Ecology	Université de Bretagne Occidentale	PLOUZANE
16 Biochemistry - Human Nutrition	Agrocampus Ouest - INRA	RENNES
17 Soft Matter Department - Rennes Institute of Physics	Université de Rennes 1 - CNRS	RENNES
18 Ecology and health of ecosystems	INRA - Agrocampus Ouest	RENNES
19 Agrarian systems and development unit (SAD-PAYSAGE)	INRA	RENNES
20 Fish physiology and genomics (LPGP)	INRA	RENNES
21 Microbiology of infectious risks	Université de Rennes 1	RENNES
22 Optimization of Processes in Agriculture, Agri-food and the Environment (OPAALE)	IRSTEA	RENNES
23 Science and technology of milk and eggs (STLO)	INRA - Agrocampus Ouest	RENNES
24 Soil, Agro- and Hydro-systems, spatialization (SAS)	INRA - Agrocampus Ouest	RENNES
25 Agricultural structures and markets, resources and territories (SMART)	INRA - Agrocampus Ouest	RENNES
26 Physiology, Environment, and Genetics for the Animal and Livestock Systems (PEGASE)	INRA - Agrocampus Ouest	SAINT-GILLES



# 23/ COMPANIES MARKETING "LABEL ROUGE" PRODUCTS

Officially recognised in 1960, the "Red Label" confirms that a product is endowed with a specific set of characteristics, giving it a high level of quality which notably results from its particular production or manufacturing conditions. A product of this kind must conform to a series of specifications which set it apart from similar foodstuffs and products currently marketed (article L.641-1).














"Red Label" products must differentiate themselves from similar existing products both for their taste and for the image they promote. Currently, about fifty "Red Label" specifications are in place in the Brittany region. Three quarters of them concern meat-based products (beef, veal, lamb, poultry, pork and cooked meats).



# 24/ COMPANIES MARKETING "AOC / AOP" AND "IGP" PRODUCTS

The Appellation d'Origine Contrôlée and the Appellation d'Origine Protégée (Protected Designation of Origin, or PDO) are given to a product originating from a region or a specific location whose quality and characteristics are the result of this specific geographic environment. The Indication Géographique Protégée (Protected Geographical Indication, or PGI) is applied when the name of a region, specific place or, in exceptional cases, a country is used in the description of an agricultural product or foodstuff originating from this region, this specific place or this country.

## / Indication category

-  AOC / AOP Cidre de Cornouaille (cider from Cornouaille)
-  AOC / AOP Coco de Paimpol (white beans from Paimpol)
-  AOC Eau de vie de cidre: Fine Bretagne et Lambig de Bretagne (two types of apple brandy)
-  AOC / AOP Moules de bouchot de la baie du Mont-Saint-Michel (mussels from the bay of Mont-Saint-Michel) - (please refer to the back of this map for companies'names)
-  AOC / AOP Oignons de Roscoff (onions from Roscoff)
-  AOC Pommeau de Bretagne (type of alcoholic apple juice from Bretagne)
-  IGP Cidre de Bretagne (cider from Bretagne)
-  IGP Coquille Saint Jacques des Côtes d'Armor (Scallops from the Côtes d'Armor)
-  IGP Farine de blé noir de Bretagne (buckwheat flour from Bretagne)
-  IGP Pâté de Campagne de Bretagne (country-style pâté)
-  IGP Volailles fermières de Bretagne / de Janzé (farmhouse poultry from Bretagne / Janzé)
-  IGP Whisky breton (Breton whisky)
-  STG Moules de Bouchot (traditional speciality guaranteed mussels) (please refer to the back of this map for companies'names)

## In number of units





# THE AOC / AOP MOULES DE BOUCHOT IN THE BAY OF MONT-SAINT-MICHEL

01 Les viviers d'Armor - CANCALE	33 Oceane - LE VIVIER-SUR-MER
02 Mytilimer - CANCALE	34 Pairaud-Simon - LE VIVIER-SUR-MER
03 Parcs Saint Kerber - CANCALE	35 Peigne Pierre - LE VIVIER-SUR-MER
04 Quema Père et Fils - CANCALE	36 Rorqual - LE VIVIER-SUR-MER
05 Delamaire - CHERRUEIX	37 Salardaine- Cornée - LE VIVIER-SUR-MER
06 Du sous moulin - CHERRUEIX	38 Salardaine La Bouchot - LE VIVIER-SUR-MER
07 Lambert Jean-Batiste - CHERRUEIX	39 Salardaine RPC - LE VIVIER-SUR-MER
08 Stephane Turmel - CHERRUEIX	40 Salardaine-Sevres - LE VIVIER-SUR-MER
09 Tombelaine Coquillages - CHERRUEIX	41 Salardaine-Vettier - LE VIVIER-SUR-MER
10 Urpheant Bruno - CHERRUEIX	42 Tonneau - LE VIVIER-SUR-MER
11 Cap à l'ouest - DOL-DE-BRETAGNE	43 Turmel Phillippe - LE VIVIER-SUR-MER
12 Cultimer France - DOL-DE-BRETAGNE	44 Ame Hasle - MELESSE
13 Besnard - LE VIVIER-SUR-MER	45 GAEC Barataud - MONT-DOL
14 Busson-Lecharpentier - LE VIVIER-SUR-MER	46 Hodbert Christophe - MONT-DOL
15 CDA - LE VIVIER-SUR-MER	47 La Vivière - MONT-DOL
16 Croize-Lechien - LE VIVIER-SUR-MER	48 Salardaine Fabrice et Sylvain - MONT-DOL
17 Delaunay et fils - LE VIVIER-SUR-MER	49 Pomona TerreAzur - NOYAL-SUR-VILAINE
18 Dufaix - LE VIVIER-SUR-MER	50 Hignard-Tonneau - SAINT-MALO
19 Guichard A la belle Du Mont - LE VIVIER-SUR-MER	51 Hodbert Sébastien - SAINT-MALO
20 Guitton Jean-Yves - LE VIVIER-SUR-MER	52 Krembsen-Jenouvrier - SAINT-MELOIR-DES-ONDES
21 Hodbert Eric et Marc - LE VIVIER-SUR-MER	53 SEA Farmer - SAINT-MELOIR-DES-ONDES
22 Hurtaud-Restoux - LE VIVIER-SUR-MER	
23 Kregadmer - LE VIVIER-SUR-MER	
24 La Marinière - LE VIVIER-SUR-MER	
25 La Milochette - LE VIVIER-SUR-MER	
26 La Sirène Dupuy - LE VIVIER-SUR-MER	
27 La Vivaraise - LE VIVIER-SUR-MER	
28 Lebeau-Neau - LE VIVIER-SUR-MER	
29 Les Bouchots d'antan - LE VIVIER-SUR-MER	
30 Montier Luc - LE VIVIER-SUR-MER	
31 Mytilea - LE VIVIER-SUR-MER	
32 Mytilus Saint-Michel - LE VIVIER-SUR-MER	

# THE STG MOULES DE BOUCHOT

01 Blanchard EARL - ERQUY - 22	33 Moulières de Chausey - MONT-DOL - 35
02 Audineau Alain - FREHEL - 22	34 Lagreve Sébastien - MONTFORT-SUR-MEU - 35
03 GAEC Mytilicole Bailly - HILLION - 22	35 Pomona TerreAzur - NOYAL-SUR-VILAINE - 35
04 Mytilicole Crépieux EARL - HILLION - 22	36 Dreno Hervé - ARZAL - 56
05 Narquet SARL - HILLION - 22	37 Bizeul Yvan - CAMOEL - 56
06 Société Nouvelle Mytilus - HILLION - 22	38 GAEC Ménager - Petit - CAMOEL - 56
07 Charbonneau - Le Roux EARL - PLANGUENOUAL - 22	39 Gouret Jean François CAMOEL - 56
08 Desbois Mytiliculteurs - PLANGUENOUAL - 22	40 Triballier - MUZILLAC - 56
09 Ets Boisseleau Eric - PLANGUENOUAL - 22	41 Berton Fabien ETS - PENESTIN - 56
10 GAEC Juin et fils - PLANGUENOUAL - 22	42 Boceno EARL - PENESTIN - 56
11 Heurtel Arnaud - PLANGUENOUAL - 22	43 Briere Fils - PENESTIN - 56
12 Moules Benoit SARL - PLANGUENOUAL - 22	44 Brière Mytiliculture - PENESTIN - 56
13 Bouesnel Jean Yves - PLEBOULLE - 22	45 Crusson Jean Michel - PENESTIN - 56
14 Les bouchots du Sillon - PLEUBIAN - 22	46 EARL Camaret - PENESTIN - 56
15 Les merveilles du Cap - PLEVENON - 22	47 EARL Evain - PENESTIN - 56
16 GAEC De Pors Even - PLOUBAZLANEC - 22	48 EARL Roussel - Freour - PENESTIN - 56
17 Bouchonneau Ricouard SARL - SAINT-CAST-LE-GUILDOR - 22	49 Ets Frédéric Bernard - PENESTIN - 56
18 Celtic Coquillages - SAINT-CAST-LE-GUILDOR - 22	50 Gouret EARL - PENESTIN - 56
19 Chevalier et Fille EARL - SAINT-CAST-LE-GUILDOR - 22	51 Ker Edulis - PENESTIN - 56
20 EARL de l'Arguenon - SAINT-CAST-LE-GUILDOR - 22	52 Les Boucholeurs SCEO - PENESTIN - 56
21 Edulimer SARL - SAINT-CAST-LE-GUILDOR - 22	53 Lespert Gérald Entreprise - PENESTIN - 56
22 Garnier Père et Fils EARL - SAINT-CAST-LE-GUILDOR - 22	54 Meskl Vras - PENESTIN - 56
23 SCEA Batard Françoise - SAINT-CAST-LE-GUILDOR - 22	55 Metayer Jean Charles - PENESTIN - 56
24 Shellfish product - SAINT-CAST-LE-GUILDOR - 22	56 Morin Jean François ETS - PENESTIN - 56
25 Conchylicole Batard David et François EARL - SAINT-JACUT-DE-LA-MER - 22	57 Moules Porcher SAS - PENESTIN - 56
26 Huîtres de Rostellec - CAMARET-SUR-MER - 29	58 Moules Richeux - PENESTIN - 56
27 Moules Le Moal EARL - LOGONNA-DAOULAS - 29	59 Mytilus du Mor Braz - PENESTIN - 56
28 Capitaine Houat - PLOUGASNOU - 29	60 Rio - PENESTIN - 56
29 Keraliou SARL - PLOUGASTEL-DAOULAS - 29	61 SARL Breizh Coquillages - PENESTIN - 56
30 Parcs Saint Kerber - CANCALE - 35	62 SCEO Bernard - PENESTIN - 56
31 Moule d'Armor - DOL-DE-BRETAGNE - 35	63 Tobie - PENESTIN - 56
32 Hodbert Christophe - MONT-DOL - 35	64 Ets Berou et Fils - SAINTE-HELENE - 56

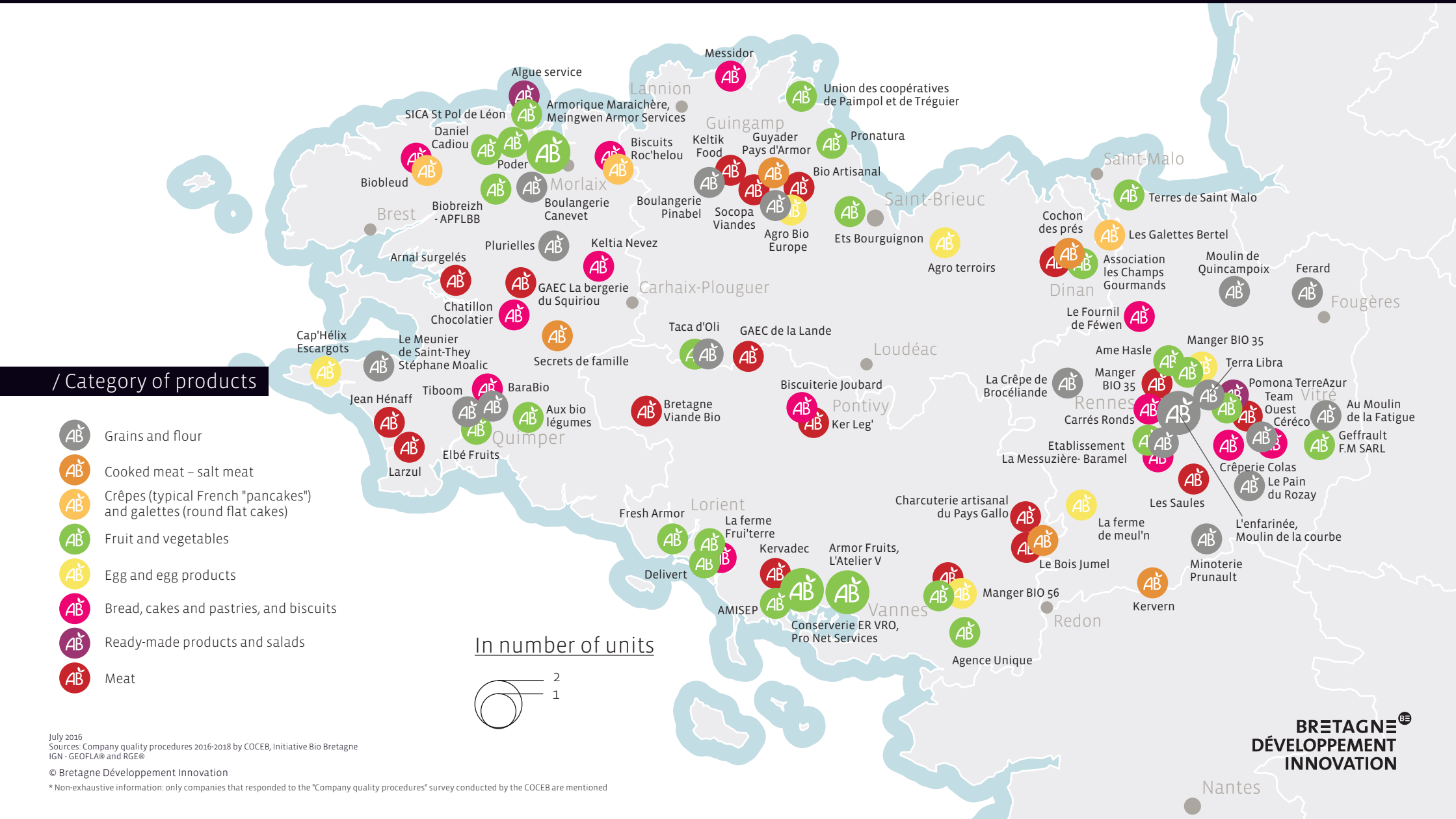


# 25/ "ORGANIC FARMING"

(FRUITS AND VEGETABLES, EGGS,  
CEREAL PRODUCTS, MEAT AND MEAT PRODUCTS)

Organic Farming certifies that a product results from a production and processing method that respects the natural balances defined in very strict specifications with systematic checks.

In 2015, Bretagne had 2,030 organic farms i.e. a certified or the switch to organic surface area of 65,000 hectares. Some 1,115 downstream businesses are "Organic Farming" certified, making Bretagne the leading region for the production of organic eggs, fresh vegetables and seaweed harvesting.  
Source: Organic Agency, 2016 – IBB, 2016



# 26/ "ORGANIC FARMING"

(BEVERAGES, SEAFOOD PRODUCTS, DAIRY PRODUCTS AND OTHER)

Organic Farming certifies that a product results from a production and processing method that respects the natural balances defined in very strict specifications with systematic checks.

In 2015, Bretagne had 2,030 organic farms i.e. a certified or the switch to organic surface area of 65,000 hectares. Some 1,115 downstream businesses are "Organic Farming" certified, making Bretagne the leading region for the production of organic eggs, fresh vegetables and seaweed harvesting.

Source: Organic Agency, 2016 – IBB, 2016



# 27/ DEFENCE AND MANAGEMENT ORGANISATIONS, AND INTER-PROFESSIONAL ORGANISATIONS

Organismes de Défense et de Gestion (defence and management organisations, or ODG) are at the heart of the Signes d'Identification de la Qualité et de l'Origine (logos for identifying quality and origin, the SIQO) system and respond to the obligations set out by the rural code:

- Development of specifications and contribution to their application;
- Participation in the defence and protection of a name, a product and an area;...

ODGs are all composed differently: trade unions, organisations and interprofessional organisations. All decisions made by an ODG are democratic and are made by representative companies from the sector and an equal number of representatives from the various categories of company.



## / Type of certification

-  Agriculture Biologique (Organic Farming)
-  Appellation d'Origine Contrôlée (Protected Designation of Origin)
-  Indication géographique protégée (Protected Geographical Indication)
-  Label Rouge (Red Label)
-  Spécialité Traditionnelle Garantie (Traditional Speciality Guaranteed)

*The Bretagne agrifood maps are created by Bretagne Développement Innovation in partnership with the Regional Council of Bretagne, the Economic Observatory for agribusinesses and agrifood industries, the COCEB (Conference of Bretagne's economic Chambers) and the CCI Bretagne (Bretagne Chamber of Commerce and Industry).*

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Find map of the Bretagne agrifood on [www.bdi.fr/iaa](http://www.bdi.fr/iaa)

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