The Bretagne agrifood maps are created by Bretagne Développement Innovation in partnership with the Regional Council of Bretagne, the Observatoire économique et social des filières agricoles et agroalimentaires de Bretagne, the COCEB (Conference of Bretagne's economic Chambers) and the CCI Bretagne (Bretagne Chamber of Commerce and Industry).

Your details

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THE BRETAGNE AGRIFOOD MAPS 2018/2020

© conception : www.pollenstudio.fr © exécution : Agence Gosselin
Bretagne’s agrifood industry

01/ PIG SLAUGHTERING AND PORK PROCESSING
02/ CATTLE SLAUGHTER AND PROCESSING
03/ POULTRY SLAUGHTER AND PROCESSING
04/ DAIRY INDUSTRY
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13/ RAW SEAWEED MATERIALS
14/ SEAWEED PROCESSING
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16/ AGRIFOOD EQUIPMENT MANUFACTURERS FOR VEGETABLE AND ANIMAL PRODUCE
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26/ DEFENCE AND MANAGEMENT ORGANISATIONS, AND INTER-PROFESSIONAL ORGANISATIONS.
BRETAGNE, LEADER OF THE FOOD REVOLUTION

The food industry has undergone drastic changes directly induced by the consumers. They have exacting standards in terms of quality, traceability, food safety, short supply chains and the environment. Eating is not only a physiological need, it has taken a political undertone. This is an opportunity for Breton food businesses to shine. Innovation has been our major drive for a number of years, striving to develop new products, recipes and forms of distribution that will meet consumers’ requirements. We rely on the high quality raw materials produced by professionals who are dedicated to their land and trade. We also rely on a network of innovation players in all areas that has recently been complemented with the creation of a CEA Tech to speed up technology transfer.

The businesses at the show perfectly illustrate the ongoing change in Bretagne, driven by future technologies and international development, taking advantage of digital transformation. Région Bretagne is naturally a leading partner in this change and has provided significant resources to make Bretagne a leading region of the current food revolution.

Loïg Chesnais-Girard
President of Région Bretagne
PIG SLAUGHTERING AND PORK PROCESSING

Bretagne is France's most important pig slaughter and pork processing region, home to 59% of the country's abattoirs in 2017. As well as the tonnage slaughtered (in total almost 1.3 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 85% of slaughtered pigs are cut up and 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.

July 2018
Sources: Observatoire économique et social des filières agricoles et agroalimentaires de Bretagne based on data provided by the CCI de Bretagne
© Bretagne Développement Innovation
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 20% 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.

July 2018
Sources: Observatoire économique et social des filières agricoles et agroalimentaires de Bretagne based on data provided by the CCI de Bretagne
IGN - GEOFLA® and RGE®
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03/ POULTRY SLAUGHTER AND PROCESSING

The Breton sector represents 32% of French chicken production and 40% of turkey meat production in 2017. However, since the late 1990s, poultry production has declined as a result of heavy competition from imported meat in Europe (Brazil, Ukraine, etc.) and more recently intra-European meats (Belgium, Germany, Poland). This decline is particularly marked in turkey, while chicken is less vulnerable. Following a root and branch industrial reorganisation which has taken place in recent years, notably in the export poultry sector, this sector is focused around several companies and groups which are characterised by a diversity of products and markets.

Sources:
Observatoire économique et social des filières agricoles et agroalimentaires de Bretagne based on data provided by the CCI de Bretagne
IGN - GEOFLA® and RGE®

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Ensuring more than 23% 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. They have also invested in tools to consolidate their competitiveness, but also to open up new areas, notably in the children’s milk sector.
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 7.7 million tonnes produced (excluding pet food) in 2017 alone, Bretagne is responsible for almost 37% 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.
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.
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, which has its roots in diversification aimed at completing a range of existing products, is becoming a source of growth and value added for many Breton agrifood businesses.

July 2018

Sources: Observatoire économique et social des filières agricoles et agroalimentaires de Bretagne based on data provided by the CCI de Bretagne
IGN - GEOFLA® and RGE®

(*) The ready-made meal is not the site’s only activity

© Bretagne Développement Innovation
Canned products are 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 (92.1 thousand tonnes and a turnover of €302M in 2017), Bretagne is the most important region in France when it comes to the fish trade, generating 28% 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), 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.

Sources: Observatoire économique et social des filières agricoles et agroalimentaires de Bretagne based on data provided by the CCI de Bretagne, IGN - GEOFLA® and RGE®

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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.

Sources: Observatoire économique et social des filières agricoles et agroalimentaires de Bretagne based on data provided by the CCI de Bretagne
IGN - GEOFLA® and RGE®
10/ BREAD, CAKES AND PASTRIES, AND BISCUITS

With a regional turnover of over 1.2 billion euros, Bretagne’s bread, cakes and pastries, and biscuits sector is responsible for more than 10% 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. The sector is comprised of SMEs, and micro-enterprises, alongside several national and international market leaders. The development of exports in this sector has been the major trend in recent years.
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.

(* The manufacture of fruit juice is not the site’s only activity

© Bretagne Développement Innovation

July 2018
Sources: Observatoire économique et social des filières agricoles et agroalimentaires de Bretagne based on data provided by the CCI de Bretagne
IGN - GEOFLA® and RGE®
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.
Ranked 10th 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.

Sources: Breizh'Alg, Brit’Inov, The Syndicate of Seaweed and Marine Plants IGN - GEOFLA® and RGE®

© Bretagne Développement Innovation
23 producers generally carry out the initial processing (drying) and then create several finished products. 72 different processing companies create agrifood, nutritional, cosmetic, phytosanitary, animal health-related and agricultural products, among others.
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 competitiveness 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.

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July 2018
Sources: CBB Capbiotek, Plug in labs Ouest – Université Bretagne Loire
IGN - GEOFLA® and RGE®

Technology Innovation Centre
Company
Research Centre
Technological Core Facility
*Biological Resource Centre
Competitiveness cluster

In number of units

10

5

1
Bretagne is the largest French agricultural region in terms of production and logically has a significant number of agrifood equipment manufacturers distributed across its region. These agricultural equipment manufacturers and providers of safe and effective solutions are classed into two major categories: agro-equipment manufacturers dedicated to vegetable produce and those dedicated to animal produce. Out of a permanent search for innovation so as to respond to major challenges in competitiveness of the agricultural branches, these companies are integrating an increasing number of new technologies from automation, the internet of things and sensors, photonics and digital sectors, big data, artificial intelligence, blockchain, etc.

July 2018
Sources: Bretagne Commerce International, Bretagne Développement Innovation, DIRECCTE IGN - GEOFLA® and RGC®
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AGRIFOOD EQUIPMENT MANUFACTURERS FOR VEGETABLE PRODUCE - 45 COMPANIES

1. Brigant Remorques
   BEGARD - 22
2. Remorques Chevance
   GRACES - 22
3. Atelier de Tolcrie de Precision d'Arbor (ATPA)
   MILFAUT - 22
4. Nogues
   LOGUVY-PLOUGRAS - 22
5. Quero Loic
   PLEDELAC - 22
6. Cozinox
   PORDIC - 22
7. Aigomat
   SAINT-CARREUC - 22
8. Sodimac
   SAINT-POTAN - 22
9. Devrand Didier
   TREDIAS - 22
10. Axion Metal
    TREMEUR - 22
11. Kerhis
    CHATEAULIN - 29
12. Sparenex
    COMMAMA - 29
13. Rannou Couchourou
    EDERN - 29
14. AEI Technologies, Etablissements Michel Pichon, Kerbras
    LANDIVISIAU - 29
15. Etablissements Jaffredou
    PENCAN - 29
16. Armor Industrie
    PLOUEZEC-DE-FAOU - 29
17. Etablissements Calletier
    PLOUGUET-MOYAN - 29
18. Askel - Sofaker, Bourgoin
    QIUMPER - 29
19. Armoricca Esvan Materiel
    QIUMPERLE - 29
20. Emily Daniel
    SAINT-URBAIN - 29
21. Emily Etablissements Rolland
    TREFLYENNEZ - 29
22. Gy Ex, MX
   ACIGNÉ - 35
23. Euromark (EAMK)
   BEDEE - 35
24. Patzer France
    BRIZU - 35
25. Eurl Loic Guel
    CHARTRES-DE-BRETAGNE - 35
26. Sulky Burel
    CHATEAUBOURG - 35
27. Arcym
    LAILLE - 35
28. Dilepix
    LASSY - 35
29. Jeanvil
    L'HERMITAGE - 35
30. Belair
    PARIGNE - 35
31. Etablissement Demarest
    PIRE-SUR-SEICHE - 35
32. Armoricaine de Fonderie Le Chateau (AFC)
    RENOU - 35
33. Doliecta
    SAINT-JACQUES-DE-LA-LANDE - 35
34. Atelier Maintenance Service Agricole
    VITRE - 35
35. Le Pinuffle Eric
    GUELAS - 56
36. Soyl France
    GUER - 56
37. Arkind Pulverisation
    MENEAC - 56
38. Galius Christias
    NEUILAC - 56
39. Avril Industrie
    PLOEORDER - 56
40. Hydromatric
    PLOERAEL - 56

AGRIFOOD EQUIPMENT MANUFACTURERS FOR ANIMAL PRODUCE - 89 COMPANIES

41. Michaud aviculture
    GRACE-UZEL - 22
42. Assena, Rose Elidia Charpente, Socobati (Caliprio)
    LAMBBALLE - 22
43. Copeeks
    LANNION - 22
44. S.E.R.C.A.A
    LOUDEAC - 22
45. Gr Energies, Serupa
    MERIGNAC - 22
46. Envipec Biogas France
    PLEDREAN - 22
47. Eurosm
    PLENEE-JUGON - 22
48. Ecalor
    PLERIN - 22
49. Kub Process
    PIERREUF - 22
50. Cimac Élevage, Ovocoupe, Rv Biotech
    PLOUFRAGAN - 22
51. Europe Composite & Technologies (ECT)
    PLOUNEVEZ-MOEDEC - 22
52. Moje
    PLUMIEUX - 22
53. Matavickol
    ROSTRENN - 22
54. Montage Installation industrielle Loudeacienne (MII)
    SAINT-BARNABIE - 22
55. T Tek
    TREMEUR - 22
56. S.B.K. Batiment
    BREST - 29
57. SDMO
    BREST - 29
58. Westair
    BREC - 29
59. Gomyze
    CHATEAUNEUF-DE-FAOU - 29
60. Bretagne Agriculture
    DADILAS - 29
61. Elevage Matériels et Technologies
    ELLIANT - 29
62. JSI Sax
    GUERESQUIEN - 29
63. BPS Méthode
    GUIMIERS - 29
64. Etablissements Francois Guillerm
    LANGASTE - 29
65. Galvelpor
    LANDELNEAU - 29
66. B.M.F. Scemat, Cirley's, Ecal, Espace Elevage, Etablissements Castel
    LANDIVISIAU - 29
67. Ijinus, West Arc
    MELLAC - 29
68. Semavi
    MOTREFF - 29
69. Le Roux
    PLUDANIEL - 29
70. Ecat Id
    PLUEDERNE - 29
71. Carrer
    PLUDVORN - 29
72. Constructions Mécaniques d'Armoric (CMA), Tell
    QUIMPER - 29
73. Anavelec
    SAINT-SEVE - 29
74. Tuffigo - Rapidex
    SAINT-IVES - 29
75. Terqua
    SIBIRIL - 29
76. Breizh Brumisation, Econofan Europe
    ARGENTER-DU-PLESSIS - 35
77. Elyo
    BAIN-DE-BRETAGNE - 35
78. Ecosel
    BAIS - 35
79. Lely France
    GROUPE RENOU - 35
80. Groupe Renou

INNOVATION AND SUPPORT

110. Photonics Bretagne
    LANNION - 22
111. Zoopole Développement
    PLOUFRAGAN - 22
112. Institut Maupertuis
    BRIZU - 35
113. Id'car
    CHARTRES-DE-BRETAGNE - 35
114. Bretagne Développement Innovation
    CESSION-SEVGINE - 35
115. Vegepolys
    SAINT-URGENT - 35
Bretagne is the largest French agricultural region and has some 200 parts manufacturers and integrators who offer solutions for Brittany’s agrifood plants as well as at national level and for exports. These companies design, develop and integrate innovative equipment and processes for the agro-food industries which are constantly seeking performance, productivity and energy efficiency. Consequently, robots, automated processes, connected objects and sensors, big data, artificial intelligence, photonics and other digital solutions are the technological foundations assisting the performance of our agro-food plants of today and tomorrow.

/ Type of activities

Technology Innovation Centre and support centre

In number of units

Company

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PARTS MANUFACTURERS AND INTEGRATORS FOR THE AGRIFOOD INDUSTRIES

183 COMPANIES

01 O M Ouest Services Maintenance
02 A.C.G.S. Mesure, S.B.R
03 Atelier de Tollerie de PrÉcision d'ArmOr (ATPA)
04 GAMII
05 Chauffage Industriel
06 VPI System
07 Brilux Distribution Coulfan-Mador Equipment
08 FPE - Food Processing Equipment, SegéDA
09 Atelier des Landes
10 Armor Ventilation S.E.E Gergaud, JF Cesbron, Mine-Bea Inotec France, Vent'Occidental
11 Mayekawa
12 Therese
13 Builiti, Le Bocar-Tech-Dic Froid, Ovoconcept
14 Mecarmor Blanchard
15 Systec Energy
16 MIIL, SCAM
17 Dynaloc
18 Agitech, Poly Concept Inox, SPIE Facilities - Saint-Brieuc
19 Scoa
20 Armor Precision Meca (Groupe St Industries)
21 Groupe Api - Imop Armor, Ingeniering Machines Speciales Tregor (LMS), Pactsoud
22 S.A.R.L. Penn
23 JF Cesbron
24 Filpack
25 Kerhis
26 LTB
27 Biys
28 LEF Industries
29 CTS, Ecma, Larval, Novimetal
30 A Therm
31 BPS Métrologie, SPIE Facilities / SPIE Industrie & Tertiaire
32 Agro Alimentaire Système, Serma
33 Balize
34 Chaudronnerie Autret Jean
35 A B Process Ingénierie, Axima REjInGeration, Coasial Technology, Fourmilab-Service
36 Simux, West Alc
37 Freeze Agro Ingénierie
38 Bretagne Anti-Adhérence
39 ETT
40 Le Lez Process
41 Société Guillo Frères
42 Carrer
43 Abscissee, Krampou
45 Abcs Industries, Guelt, S.N M
46 Prima Daniel
47 ACMG Geoalbre
48 AEM, AEI, ETIPack Spruter - Groupe Syneric Industries, Secma, Siminox, Solia Concept
49 Aicism, Probia Ingenierie
50 SPIE Industrie & Tertiaire
51 Versa - Informatique Industrielle Automatismes
52 SARAF
53 Sofac Coudic MadorE
54 Air Ouest Climatisation (AOC)
55 Le Lanniait (Groupe Sd)
56 M.S. Industrie, Merand, Palamatic Process
57 Actemium Rennes, Eiffel Energy Systemes - Maine Bretagne, Gelec (Hybride Energy), Leroy Somer, Dét, Altenov, Thebaud Ingénierie
58 Schneider Electric
59 EMF (Entreprise Metallo Plastique)
60 BTO
61 ACF System, Ferotec France
62 Gillouye
63 Guillery Syf
64 JF Cesbron
65 APIA Translube, Meca Project, SPIE Facilities - Rennes
66 B C Inox, Bocard, Cofely Axima (Seriac Froid)
67 BA Systems
68 EMD
69 Sodalec
70 Brenor 35, Clauger
71 Cimlec
72 SCFO
73 RK Flex
74 AFU Mécanique de PrÉcision, Gedouin Ingenierie
75 Alain Leray - Maintenance Industrie
76 Idpack - MS Tech
77 Bizerba Lucoz, Pesage Industriel de l'Ouest
78 Diotec
79 Société de Matériel Alimentaire
80 Aral, Chaudronnerie Le Drogo, Marel France
81 Brestim
82 SLCE
83 Agro Maintenance Systeme
84 STACEM
85 S.B.A.I
86 Conceptogam
87 E.R.T.A
88 M.C.T.I., SOBRA
89 SDTN - Krepele, So Di Avi
90 Arbor Technologies
91 Becam
92 Le Garrec Entreprise
93 A C T I, Id Automatisme
94 A.E.F., Five Sylops, Haarslev Industries (Sil)
95 Armor Inox
96 ATE
97 West Robotic
98 Hydroclean
99 Radar Automation
100 Britek
101 Geothermie
102 Aley Savomie, SPIE Industrie & Tertiaire, Sylops - Sedep
103 Andre Daniel
104 Electro Standard, Setar et Vti
105 Acemo Ouest Automatisation, Ponsivy Froid
106 Meyn France
107 Arinox, JF Cesbron
108 Food Technology France
109 Apis Technologies, Oustic Matic

INNOVATION AND SUPPORT

110 Pôle Cristal
111 Photonics Bretagne
112 CEVA
113 ADRIMA Développement, Brezpack, CEa Tech Bretagne
114 Institut Maupertuis
115 Bretagne Développement Innovation - BDI, Valorial
116 ID Mer
The packaging industry in Brittany has always supported agrifood companies for all types of products and innovations. Paper packagings, cardboard, molded cellulose, plastic in all forms (films, trays or flasks ...), metal cans, but also equipment manufacturers and traders (unstackers, thermoformers, vacuum machines or modified atmosphere, cartoners, case packers,...) as well as various associated services, such as graphic and volume design, contract packaging, consulting and training.
### AGRIFOOD PACKAGING

#### EQUIPMENT MANUFACTURERS AND TRADERS - 29 COMPANIES

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<th>No.</th>
<th>Company Name</th>
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<tr>
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<td>Guillet, Société Nouvelle de Mécanique</td>
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<td>Hema, Minipack, Secma-Cabon</td>
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#### SERVICE PROVIDERS - 35 COMPANIES

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<td>Des reins dans l'eau</td>
<td>SAINT-BRIEUC - 22</td>
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<td>108</td>
<td>EIRL Développement</td>
<td>PLEINER - 22</td>
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<td>Iyetech, La Raffinerie</td>
<td>LANNION - 22</td>
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<td>Ouest Pack</td>
<td>PERROS-GUIREC - 22</td>
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<td>111</td>
<td>Actuaplast</td>
<td>CRACH - 29</td>
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<td>Appaloosa</td>
<td>PLOUGUERN - 29</td>
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<td>Archange</td>
<td>PLOUGUERN - 29</td>
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<td>114</td>
<td>Carret Noir, Image de Marque, Oui Design</td>
<td>BREST - 29</td>
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<td>115</td>
<td>LCS - Logistique Conditionnement Stockage</td>
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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” competitiveness 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.

Sources: Plug in labs Ouest - Université Bretagne Loire, Bretagne Développement Innovation
IGN - GEOFLA® and RGE®
© Bretagne Développement Innovation
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<td>Regulated diseases of fish</td>
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<td>Virology, immunology and parasitology in poultry and rabbits</td>
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<td>Physiology, Environment, and Genetics for the Animal and Livestock Systems (PEGASE)</td>
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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, but also capital from groups in French retail.

/ Activity and turnover (in millions of euros)

- **Animal feed**
- **Bread, cakes and pastry**
- **Butcher’s meat** (lamb, beef, veal, pork)
- **Cattle**
- **Combined products**
- **Intermediate food products**
- **Milk**
- **Pork**
- **Poultry**
- **Ready meals**
- **Salted cooked meats**
- **Seafood products**
- **Vegetables**

July 2018

Sources: Observatoire économique et social des filières agricoles et agroalimentaires de Bretagne, based on data provided by the CCI de Bretagne, IGN - GEOFLA® and RGE®

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INTERNATIONAL INVESTMENT IN THE AGRIFOOD SECTOR IN BRETAGNE

128 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, run 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

July 2018
Sources: Observatoire Invest in BreTAGne, Bretagne Commerce International
IGN - GEOFLA® and RGC®
# The Food Industry Sector in Bretagne

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In Brittany the economic agrifood actors have been involved in 39 European projects from 2014 to 2017. This European involvement is aligned with their long date collaborative abilities.

Through the implementation of several European tools, Brittany improves on various subjects from the territorial strategy, research, rural development, to commercialisation of new products. Brittany also benefits from a strong research network in agriculture, fisheries, aquaculture, food process, and IT. Since 2014, 14 research projects have been reinforcing agrifood sectors capacities.
The “Red Label” certifies that a product has a level of quality better than that of similar products usually sold. This level of quality is conferred by its production or manufacturing conditions indicated in specifications deposited with the INAO. Around fifty “red label” specifications are listed in Brittany. In 2017, a total of 1,756 farms and 43 transformation companies constituted the “Red Label” sectors in Brittany.
"AOC / AOP" AND "IGP" PRODUCT TRANSFORMATION FIRMS

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.

Bretagne has 6 AOC/AOP and 6 IGP for farmed products. In 2017, a total of 1,052 farms and 81 transformation firms constituted these sectors.

July 2018
Sources: Survey of Defense and Management Organisations by Regional Chamber of Agriculture
IGN - GEOFLA® and RGE®
ORGANIC FARMING
COMPANIES TRANSFORMING PRODUCTS
SUBSCRIBING TO INITIATIVE BIO BRETAGNE

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 2017, 2,726 farms and 980 transformation companies represent the organic sectors in Bretagne.

Source: FRAB 2018, Organic Agency, 2018

In number of units

- Seaweed
- Other products
- Ready-made products and salads
- Seafood products
- Seaweeds
- Various products

Category of products

- Beverages
- Bread, cakes and pastries, and biscuits
- Condiment
- Cooked meat – salt meat
- Crêpes (typical French «pancakes») and galettes (round flat cakes)
- Dairy products
- Egg and egg products
- Fruit and vegetables
- Grains and flour
- Meat
- Other products
- Various products
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.