

Rhône-Alpes: A Dynamic Economic Crossroads of Western Europe

ECONOMIC SUMMARY

The Rhône-Alpes region covers 43,698 square kilometers, or 8% of the area of metropolitan France. With approximately six million inhabitants (9.7% of the national population) and a Gross Domestic Product (GDP) of €182 billion (comprising 10% of the national GDP), Rhône-Alpes represents the largest population and economic centers in the nation after Paris and the Ile-de-France region. Rhône-Alpes' maintains an exceptional geographic location at an important point of contact between Northwestern Europe, Southern Europe and the Mediterranean Basin, and Central Europe. This crossroads grants the region a significant and implicit international role and adds to the dynamism of its export and import markets. The region's snow-capped Alps have given rise to a highly developed and successful tourism industry (the second most-frequented region after the Ile-de-France for tourism purposes) that is supplemented by heavy hotel infrastructure.

GEOGRAPHIC AND DEMOGRAPHIC OVERVIEW

The region is comprised of eight departments: Ain (01), Drôme (26), Loire (42), Savoie (73), Ardèche (07), Isère (38), Rhône (69), and Haute-Savoie (74). Rhône-Alpes is the only French region that contains three major cities – Lyon (472,305 inhabitants), Grenoble (157,900 inhabitants), and Saint-Etienne (175,700 inhabitants) (2004 census). Lyon, the regional capital, which is also considered the gastronomy capital of France, is located about 480 km Southeast of Paris, 400 km North of the Côte d'Azur and 150 km West of Switzerland. The city is serviced by Lyon Saint-Exupery International Airport (30 km from downtown), an excellent highway network and an efficient railway system (TGV and others), placing Lyon only two hours from Paris; the other key population centers in the region are all located within 250 km of Lyon. Lyon's greater metropolitan area contains a population of nearly 1,798,395 inhabitants (est. 2008), making it the second-largest urban area in France after Paris.

RHONE-ALPES MARKET OVERVIEW

Counting itself among the highly industrialized “Four Motors of Europe”, Rhône-Alpes is a major hub of goods as both a transit point and final destination – millions of tons of manufactured products and raw materials pass through the region every year. It is the sixth most productive (as well as populous) region in the European Union and has attracted millions of dollars in foreign investment, particularly from the United States. In fact, 12% of all French exports are produced in Rhône-Alpes, with €45.13 billion worth of goods exported in 2007 alone. They imported approximately €38.27 billion from international suppliers, and ended the year with a €6.9 billion surplus, compared with a national €52.9 billion trade deficit. In 2007, exports of manufactured goods increased more sharply in Rhône-Alpes than at the national level (3.4% against 2.0% in all of metropolitan France), but less than in 2006 (10.6%). As a region, Rhône-Alpes actually produces more wealth annually than some European Union (EU) countries, including Greece, Ireland, Finland, and Portugal.

Rhône-Alpes ranks first in French energy production and second in chemicals, mechanical construction and the electrical industry. Companies such as Rhodia, Atofina Aventis, Miomérieux, Merial, Boiron and Merck-Lipha have offices and/or headquarters in the region. Over 2000 metallurgical companies with 60,000 employees operate in the area, and many information

technology (IT) companies develop the fields of computer systems, engineering and systems integration. Since the first half of 2006, 11,000 new businesses have been created in Rhône-Alpes. Interestingly, 4,700 previously unemployed French citizens became business owners, with 42% starting their own businesses.

While the region has been a recent economic success story, industries continued to lose jobs in 2007 (-0.3%). However, it has not lost as many jobs as at the national level, with a 1.4% drop in the workforce. By sector, the largest job losses were announced in textiles and clothing (-5.7%), and this number is predicted to rise in the coming years. The chemical industry also saw a job loss of -2.9% in 2007. Pharmaceutical companies and the automotive industry seem to be bucking this trend, with announced job growth of 3.3% and 1.7%, respectively.

Division of businesses by market in Rhône-Alpes (2006):

Agriculture- 52,261 businesses
Industry- 34,848 businesses
Construction- 40,518 businesses
Trade- 77,942 businesses
Services- 181,556 businesses

Total- 387,125 businesses

Division of employees by market in Rhône-Alpes (2005, percentages)

Agriculture- 2.4%
Industry- 19.5%
Construction- 6.7%
Trade- 13.6%
Services- 57.8%

As the region continues its post-industrial transition, more employees continue to shift from agricultural and manufacturing sectors to more service-based positions. With nearly 47% of all businesses in the region dedicated to the service sector, Rhône-Alpes has continuously sought to increase the competitiveness of its workers. Approximately 57.8% of the region's workers maintain service-based jobs, a clear indicator of a healthy post-industrial economy.

IMPORTANT MARKET FIGURES

GDP: €182 billion (2007)

GDP per capita: €30,043 (2007)

GDP per business: €72,894 (2007)

Number of companies: 387,125 (2006)

Number of patents filed: 1,872 or 12.3% of the total for France (2006)

Unemployment: 6.3% compared to 7.2% in metropolitan France (2008)

Businesses with over 50 employees with foreign capital base: 900, employing 165,000 people (2005)

Total number of employed persons: 2.5 million (2007)

RESEARCH, ENERGY AND EDUCATION-DRIVEN DEVELOPMENT

The region benefits from a high level of synergy between education, research and industry. With nearly 33% of the population under the age of 24, a highly developed education system has the potential for producing a highly motivated, intelligent, and efficient workforce. Eight universities and 35 grandes écoles serve 236,000 students annually and train nearly 15% of all of French engineers. Rhône-Alpes is fourth in Europe in terms of staff dedicated to research and development (79,600 people), with 2.7% of its GDP budgeted for research purposes (2002).

Energy and Green Technologies

Rhône-Alpes is the largest energy provider in France, shouldering 20.6% of the country's energy production burden. It is also the largest producer of electricity and energy equipment in Europe. It provides 22% of France's nuclear power, 39% of its hydraulic power, and 5% of its thermal power. The energy sector in Rhône-Alpes employs 25,000 people, and the entire electricity grid employs over 100,000.

Rhône-Alpes has invested heavily in solar, wind, biomass, and hydropower, hydrogen, and fuel cell technology. Through the 2005-2010 "Plan régional de développement des Energies renouvelables et de maîtrise de l'énergie" – or "Regional Development Plan of Renewable Energies and Energy Control" - Rhône-Alpes has become a leading researcher in creating more efficient energy networks and has highlighted the importance of renewable energy in everyday life. To this end, more than 20,000 households in Rhône-Alpes are running on renewable energy sources.

UNITED STATES' PRESENCE IN RHONE-ALPES

While Germany, Italy, and Spain are the leading consumers from the region and China is its third-largest supplier (with Germany and Italy occupying first and second, respectively), the United States figures prominently in both export and import schemes with Rhône-Alpes (sixth-largest supplier). The United States owns 26.5% of all the foreign capital companies in the Rhône-Alpes region, making it the largest foreign capital investor in the region. In January 2006, the United States owned at least 235 businesses in the region with 50 or more workers. Other American companies, such as McKinsey, have fewer than 50 workers and are therefore not included in this statistic. The United States represents 8.5% of the exports to the region, making it one of Rhône-Alpes' largest and most important clients.

The following chart shows the value of the Rhône-Alpes' imports from the United States in the first three quarters of 2008.

<u>Total (millions of €)</u>	<u>€451949</u>	<u>€491182</u>	<u>€410066</u>	<u>€1353197</u>
Produits pharmaceutiques	59950	59299	59653	178902
Produits de la parachimie	48951	45001	45503	139455
Produits de la chimie organique	41855	32422	37744	112021
Matériel médicochirurgical et d'orthopédie	31271	41672	42745	115688
Coke et produits radioactifs	33258	64344	33	97635
Autres machines d'usage spécifique	23510	26982	19730	70222
Equipements pour automobiles	25171	22606	21301	69078

Matériel de mesure et de contrôle	20659	22110	21594	64363
Equipements mécaniques	18370	23610	18778	60758
Métaux non ferreux	16477	16759	15992	49228
Matériel électrique	13218	11837	11862	36917
Composants électroniques	12041	11865	12797	36703
Machines d'usage général	10141	9676	10665	30482
Produits métalliques	9546	10848	9349	29743
Produits céramiques, matériaux de construction	8794	8093	8316	25203
Produits de la construction automobile	7983	8980	10002	26965
Produits en matières plastiques	7840	8305	7554	23699
Pâte à papier, papiers et cartons	7287	5620	5370	18277
Machines de bureau et matériel informatique	6006	5817	4126	15949
Machines-outils	5194	5284	4720	15198
Produits en caoutchouc	5474	4739	4818	15031
Produits de la culture et de l'élevage	4207	4727	3969	12903
Produits de la chimie minérale	5076	3383	3412	11871
Verre et articles en verre	3034	3971	3872	10877
Produits sidérurgiques et 1ere transformation de l'acier	3202	3877	2157	9236
Moteurs, génératrices, transformateurs électriques	2058	2718	1718	6494
Emission et transmission du son et de l'image	1734	1687	2706	6127
Articles de sport, jeux et produits divers	2211	1274	1320	4805
Construction aéronautique et spatiale	942	2123	742	3807
Viandes, peaux et produits à base de viande	324	5158	511	5993
Armes et munitions	927	1402	2158	4487
Autres Produits	15238	14993	14849	45080

The following chart shows the value of the Rhône-Alpes' exports to the United States in the first three quarters of 2008:

<u>Total (millions of €)</u>	<u>€787968</u>	<u>€757010</u>	<u>€952169</u>	<u>€2497147</u>
G14-Coke et produits radioactifs	153439	167879	348467	669785
E27-Autres machines d'usage spécifique	120499	92004	71534	284037
C31-Produits pharmaceutiques	84113	59206	59615	202934
F61-Matériel électrique	52669	49134	49921	151724
F42-Produits de la chimie organique	34913	34793	46191	115897
E34-Matériel médicochirurgical et d'orthopédie	35452	35550	33426	104428
F43-Produits de la parachimie	23497	25386	23361	72244
E23-Equipements mécaniques	28272	25948	26736	80956
F55-Produits métalliques	27370	24188	22316	73874
D02-Equipements pour automobiles	22729	25203	27169	75101
E35-Matériel de mesure et de contrôle	17176	16265	19860	53301
E24-Machines d'usage général	14255	16385	17171	47811
F52-Métaux non ferreux	16260	15463	15675	47398
C43-Articles de sport, jeux et produits divers	6920	12296	19598	38814
F46-Produits en matières plastiques	11583	13586	11747	36916
C32-Savons, parfums et produits d'entretien	13042	11187	14314	38543
B03-Boissons	12125	9219	9536	30880

E32-Moteurs, génératrices, transformateurs électriques	9678	7213	13630	30521
F62-Composants électroniques	6831	11963	11400	30194
E31-Machines de bureau et matériel informatique	9073	9726	8890	27689
C11-Articles d'habillement et fourrures	10274	5377	10872	26523
F32-Pâte à papier, papiers et cartons	5731	10044	7806	23581
F51-Produits sidérurgiques et 1ere transformation de l'acier	6479	9048	6539	22066
C12-Cuirs, articles de voyage, chaussures	3451	5504	9608	18563
C46-Matériel optique, photographique et d'horlogerie	4618	6309	6975	17902
E26-Machines-outils	4854	6144	5743	16741
F41-Produits de la chimie minérale	4479	4306	7129	15914
E13-Construction aéronautique et spatiale	4462	5638	5717	15817
F21-Produits filés, tissés ou ennoblis	5114	4146	3576	12836
F22-Articles et produits textiles	4686	4320	3817	12823
C41-Meubles	4821	3991	2924	11736
F14-Produits céramiques, matériaux de construction	2843	3177	3557	9577
F45-Produits en caoutchouc	4051	3748	2426	10225
B05-Produits des industries alimentaires diverses	2716	3345	3959	10020
C45-Réception, enregistrement, reproduction (son, image)	2813	2930	3098	8841
E14-Cycles, motocycles, matériel de transport	1810	2236	3223	7269
B02-Produits laitiers et glaces	2124	1812	2545	6481
C20-Produits de l'édition, imprimés ou reproduits	1545	1760	1455	4760
F23-Etoffes et articles à maille	1243	1144	1480	3867
A01-Produits de la culture et de l'élevage	1994	1706	915	4615
Z00-Divers	918	1695	1110	3723
F13-Verre et articles en verre	575	633	731	1939
C42-Bijoux, instruments de musique	1298	952	790	3040
F44-Fibres artificielles ou synthétiques	1834	275	1262	3371
Autres Produits	3339	4176	4355	11870

KEY INDUSTRIES: FROM TRADITIONAL TO LEADING EDGE

Rhône-Alpes Major Exports (2007)	Export Value (€)	Share of Regional Exports
Electrical and electronic components	7,134,496,005	15.8%
Chemicals, rubber and plastics	6,900,863,747	15.3%
Mechanical equipment	6,548,251,375	14.5%
Automotive Parts	5,208,048,677	11.5%
Metal and metallurgic products	4,151,300,935	9.2%
Electrical and electronic equipment	2,997,911,282	6.6%
Fuel and combustibles	2,386,453,337	5.3%
Pharmaceuticals	2,195,905,816	4.9%
Agri-food	1,829,484,763	4.0%
Home equipment	1,698,422,588	3.8%
Textiles	974,646,623	2.2%
Paper and wood products	886,563,661	2.0%

Chemical Industry

Key Figures

Number of jobs: 36,000

Number of companies: 200

Sales: €8.7 billion

14% of national employees in the sector

25% of national research in the sector

Industry Profile

The chemical industry of Rhône-Alpes dates back to the 18th century and the need to provide dyes to the textile industries; the region continues to be the leader in chemical production, benefitting from a wide variety of industrial chemistry activities and the resulting interactions between their actors.

The three major sectors of the chemical industry include heavy chemistry, specialty chemistry and paracheimistry, which encompass the production of both core and fine chemistry products. The region produces 100% of the paracetamol produced in France and a significant part of national PVC production. It is also the leader in silicone and phenol production.

A strong research and development network, including a research center housing company laboratories such as Rhodia and Atofina, university laboratories, and training centers such as the École Supérieure de Chimie, Physique et Electronique – Higher Chemistry, Physics and Electronics School – provide 25% of the national chemical research giving the region one of the highest research potentials in Europe.

While 50% of chemical production companies in the region employ less than 20 employees, the large international groups, including Atofina (Total, Elf group) Air liquide, Rhodia, Ciba Spécialités Chimiques, Lipla, Aventis, CropScience and others, are present as well. The region exports 52% of its production and plays an important role in the international market.

Important Events

EUROCOAT

International Exhibition for the Paint, Coatings, Varnish, Printing Ink, Glue and Adhesive Industry.

Professional : every two years

IDEXPO

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Next Edition: September 2009

Plastics Industry

Key figures

Number of jobs: 27,000
Number of companies: 900
Sales: €3.5 billion

Industry Profile

The plastic production industry is historically centered in Oyonnax, a two hour drive from Lyon on the way to Geneva and since the industry's industrialization spurred by the development of the injection press in 1925, the Oyonnax and surrounding area are now known as the Plastic Valley.

With 30% of national plastic production, the Rhône-Alpes region is the choice location of the major international plastics companies, including Plastic Omnium and Allibert, leaving room for the overwhelming majority of smaller companies forming the industry. Likewise, the region is home to the important names of the main sectors in this rather fragmented industry: Elf-Atochem (basic plastic material), SNCI (dyes and pigments), Billion (injection presses), Berchet (toys), Bollé and Aires (glasses), Grosfillex (furniture and garden equipment), Taraflex and Gerflor (plastic flooring), among others.

Several prime contractors contribute to the success and dynamism of this industry, including RVI (Renault Vehicules Industriels) in the truck and bus industry, Seb-Moulinex and Philips in electrical household goods, Hewlett-Packard and Bull in information technology and Salomon in the leisure industry.

The breakdown of the plastics production is as follows:

Technical parts: 38%
Plates, sheets, tubing: 8%
Packaging: 12%
Elements for the building industry: 6%
Miscellaneous items: 36%

The industry is supported by a highly developed research, training and professional network, comprised of the European center of plastic processing (Oyonnax), its members pooling almost 50% of national sales by the profession, Composi'tec resource center, École Supérieure de Plasturgie d'Oyonnax – Higher Plasturgy School of Oyonnax, and two employer associations, GIPRA (Group of Plasturgy Industries of Rhône-Alpes, Auvergne and Bourgogne) and Plasturgie Centre-Est (Oyonnax), each including more than 300 companies.

Important Events

International Plastic Processing Forum (FIP)

Professional – Every 2 years

IDICE

B.P. 219 – Oyonnax – Cedex

33 (0) 4 74 73 42 33

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Metallurgy and Mechanical Equipment Industry

Key Figures

Number of Jobs: 352,000

-mechanical engineering: 102,000

-metallurgy: 250,000

Number of Companies: 10,800

-mechanical engineering: 1,800

-metallurgy: 9,000

Sales: €63.3 billion

-mechanical engineering: €13.3 billion

-metallurgy: €50 billion

Industry Profile

The Rhône-Alpes region has strong representation in light metals melting with companies such as Fonderies du Léman, Métaltemple and Florence and Peilloin, in engineering with companies such as Comabi (scaffolding), Francialex (joinery and screw work) and in the industrial services for metal work with Opinel, Tivoly and Demurger. Sheet-metal work, employing 7,186, includes nuclear sheet-metal work and sheet-metal work/piping and is concentrated in the Rhône and the Isère departments. The lifting equipment sector composed of international groups such as Pomoglaski and Otis, Schindler, Kone and Thyssen, specializing in people transportation.

Finally, the region excels in the special purpose machine sector, with world leaders such as Caterpillar, Montabert, Solymac Fiorani, Pinguely Haulotte and Potain, giving the region the leading role in manufacturing excavation and construction machines. In this sector, the region also produces:

-machines for the agri-food industry

-printing presses

-machines to transform rubber and plastics

-paperboard equipment

Several training and research organizations provide a dynamic professional base. These include the Associations pour la Formation Professionnelle de l'Industrie (AFPI-Vocational training Schools for Industry), the Centres de Formation d'Apprentis de l'Industrie (CFAI-Training Centers of Apprentices of Industry), the Institut de Développement de la Compétitivité par la Qualité (IDECQ=Development of Competitiveness through Quality Institute) and the Institut des Techniques d'Ingénieurs de l'Industrie (IT2I –Industrial Engineering Techniques Institute). Complementing these training associations are teaching and training centers including several “grandes écoles”, the Centre Technique de l'Industrie du Décolletage-Industrial bar Turning Technical Center and the Centre Technique des Industries Aéauliques et Thermiques-Technical Center for Industries in Aeraulics and Heat Transfer and the Institut de la Soudure-Welding Institute.

Important Events

Alliance – Subcontracting

Professional – every two years
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www.parcexpo-hautesavoie.com
Next Edition: March 2009

Textile and Clothing Industry

Key Figures

Number of Jobs: 43,600
-textile: 30,600
-clothing: 13,000
Number of Companies: 1,700
-textile: 1,300
-clothing: 400

Sales: €5.5 billion
-textile: €4.3 billion
-clothing: €1.2 billion

Industry Profile

The textile industry, with its roots dating from 1536 when François 1er allowed two gentlemen to establish a manufacturing house for golden, silver and silk fabrics in Lyon, has developed most strongly in the west of the Rhône-Alpes region, with little to no representation in Savoie and Haute-Savoie.

All sectors of the textile industry are represented in the region. Despite the presence of big names like Sarah Lee and Playtex, small companies dominate the industry.

The industry in the region is divided as follows:

- Weaving: 45%
- Throwing and texturing: 10%
- Knitting: 15%
- Converting: 15%
- Other (dyes and finishes printing): 15%

The weaving sector, the region's specialty, cites leaders such as Delorme, Jalla and Devaux in the cotton industry, and Thuasne and Gibaud in narrow fabrics. Within the sector, the Rhône-Alpes prides itself on its silk-weaving, providing 80% of national production. The companies of Proverbio, Marin et Compagnie, Mathelin and Teintureries de la Turdine are the principal contributors to the converting sector.

The clothing sector is also comprised of mainly smaller companies among which figure larger actors such as Plutex and Adolphe Lafond. Lingerie is the region's specialty, with contributors such as Lise Charmel, Lou, Devernois, Marcelle Griffon, Nathalie Chaize and Trigon, while other activities are represented by Zannier in children's clothes, Adolphe Lafond and Cepovette in work apparel and Eider in sportswear.

Six lycées professionnels (vocational schools), the École Supérieure des Industries Textiles de Lyon and the École Française de Tannerie, ITECH (training centers), the Institut Textile de France and the Centre Technique des Industries de l'Habillement, the Centre Technique de la Teinturerie et du Nettoyage, the Espace Textile, the Maison du Textile and the Centre National de l'Innovation du Textile and the Musée des Tissus all contribute to the training and research potential of the region.

Important events

Lyon Mode City

Lingerie Collections: spring-summer lingerie and men's underwear collections

Swimwear Collections: women, men, children swimwear, sportswear, surfwear

Professional – Every year

Eurovet

33 (0)1 47 56 32 32

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www.lyonmodecity.com

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Interfilère Lyon

International Fair for Fabrics, Laces Embroidery and Textile Accessories for Lingerie, beachwear sports and men's underwear

Professional – Every year

Eurovet

33 (0)1 47 56 32 32

33 (0)1 47 56 32 99 (fax)

lmc@la-federation.com

Electrical and Electronics Industry

Key Figures

Number of Jobs: 56,000

Number of Companies: 2,700

Sales: €7.6 billion

Industry Profile

The electrical industry in the Rhône-Alpes region was originally based on hydro-electricity in the Alpes which, when paired with the development of higher education and training potential in the region, allowed for the current diversification and advancement of the industry. With more than 50% of national production, the region specializes in high-voltage electrical equipment, although low-voltage equipment, motors, generators and house-hold appliances forms an integral part of the market. The region notes several big names in the industry, including Schneider, Legrand, which covers electrical appliances, Entrelec for electric and electronic cable, Crouzet Automations and Précía which specializes in weighing equipment.

Lyon, Grenoble, Saint Etienne and Valence maintain the highest concentration of industry plants. Large plants are responsible for the majority of electrical equipment production with important names such as STMicroelectronics, Thomson Semi-Conducteurs Spécifiques (Thomson CSF), Thomson Tubes Electroniques, Ascom/Monetel, Alcatel-Alsthom, and Radiall; Hewlett-Packard is the main representative of information technology.

The “grandes écoles” in Lyon, Grenoble, Saint-Étienne, Annecy provide an excellent foundation to the industry through advanced training and research. Public research makes important contributions to the physical, biological and chemical sectors while Grenoble’s LETI (Laboratoire d’Electronique, de Technologie et d’Instrumentation-Laboratory for Electronics, Technology and Instrumentation) specializes in applied electronic research. The region’s specialization in activities such as microelectronics, micro-technologies, optoelectronics and instrumentation has earned it the status as a leading site for microelectronics.

Health Industry

Key Figures

Number of Jobs: 37,400

- pharmaceutical industry: 12,000
- medical equipment: 21,000
- paramedical: 1,400
- veterinary industry: 3,000

Number of Companies: 250

- pharmaceutical industry: 92
- medical equipment: 110
- paramedical: 15

Sales: €6.1 billion

- pharmaceutical industry: €2.4 billion
- medical equipment: €2.7 billion
- paramedical: €112 million
- veterinary industry: €690 million

Industry Profile

Dating from the foundation of the Hôtel-Dieu in Lyon in the 12th century, the health industry in the region plays a major role in both its research and commercial stages, covering all the major sectors and professions. The region contributes more than 20% of national pharmaceutical production, with companies such as Aventis Pasteur, number one in vaccines and serums, L'ipha santé and BioMérieux, making the region the leader in the industry. Also strong in the region is the in vitro diagnosis industry, with 30% of national activity, composed mainly of small companies specializing in reagent production for research and clinical purposes. While both of these sectors are concentrated in Lyon and the Rhône department, the medical equipment industry is more equally spread out between the major population centers of Lyon, Grenoble and Saint-Etienne.

The health industry is supported by an important research and professional base including advanced medical centers such as the Hospices Civils de Lyon, the CHU of Grenoble and Saint-Etienne and the Centre Léon-Bérard in Lyon; research centers such as the International Agency for Research on Cancer (IARC), Association des Fabricants de l'Industrie Pharmaceutique de la Région Rhône-Alpes et de Lyon (AFIPRAL-Pharmaceutical Industry Association); higher education institutions such as the Ecole Nationale Supérieure de Lyon, applied research center and the Ecole Vétérinaire de Lyon, advanced veterinary school; and ARTEB (Regional Agency for Medical Technologies and Biotechnology), grouping scientists and manufacturers.

Biotechnology Industry

Key Figures

Number of Jobs: 60,000

Number of Companies: 600

Sales: €305 million

Industry Profile

Despite being a new industry, special focus from the US, Japan and Europe has prompted much success in the region, making it the second biotechnologies region after Paris and its surrounding area.

The industry is composed of large multinational groups (Aventis CropScience, Merial, Charles River, Monsanto and BioMérieux) as well as regional SME/SMIS and even Biotech start-ups, ensuring the region a high level of diversification. Rhône and Isère are the most important contributors of regional companies employing bio-industries in their activity, concentrated most strongly in Grenoble and Lyon.

The breakdown of the biotechnologies industry is as follows:

Health: 55%

Environment: 25%

Agri-food: 10%

Other sectors (plant, cosmetics, veterinary): 10%

The health industry is composed of the pharmaceutical and biomedical sectors, focused most strongly in Lyon and the Rhône-Alpes region. ENS, Génopôle and P4 laboratories are important

research and training centers in the Lyon-Gerland biotech center. Companies and national organizations such as Laboratoires Aguettant, Aventis Pasteur, Carso, Merial and Agence Française de Sécurité Sanitaire des Aliments (AFSSA-French Agency of Food Safety), and the Agence Française de Sécurité Sanitaire des Produits de Santé (AFSSAPS-French Agency of Health Product Safety) are also important contributors to the industry.

The dynamic professional network and research base of the region is an important factor in its success. It includes the Laboratoire de Virologie Haute Sécurité P4, researching infectious diseases, the Centre Mondial de Surveillance et d'Alerte des Maladies Transmissibles (World Transmissible Sickness Surveillance and Alert Center), training doctors in developing countries, the Agence Régionale des Technologies Médicales et Biotechnologies (Regional Medical Technology and Biotechnology Agency), linking laboratories and companies, the International Agency for Research on Cancer and Cemagref, a research organization for engineering, agriculture and the environment.

Important Events

Biovision / Biosquare
Conference and Partnering Sessions
Professional – Every two years
33 (0)4 78 92 70 00
33 (0)4 78 92 70 15
biovision@biovision.org
www.biovision.org
Next Edition: 8-11 March 2009

Digital Industry

Key Figures

Number of Jobs: 60,000 (approx.)
Number of Companies: 1,800-2,000
Sales: €3 billion (approx.)

Industry Profile:

The Rhône-Alpes region takes second place after Paris and its region in digital, information and communication technology, with Grenoble and Lyon being centers of highest concentration (85%). Grenoble has made its name as the leading European center of micro and nanotechnologies, thanks to the construction of the Hewlett-Packard production site, the presence of the Polygone Scientifique Research and Development Center and the National Polytechnic Institute of Grenoble, companies such as Sun Microsystems, and public laboratories. Lyon's specialty lies in software and new technologies.

The breakdown of the industries sector according to number of jobs:

Software editors: 9,000 (in Lyon)
Telecommunications/services: 8,000 in Lyon and 7,000 in Grenoble
Call centers: 6,000 (in Lyon)
Multimedia/Internet/ video games: 3,000 (in Lyon)

Software development: 3,300 (in Grenoble)
Integrators: 3,500 (in Grenoble)
Constructors: 5,100 (in Grenoble)
Professional electronics: 8,500 (in Grenoble)
Micro-electronics: 6,600 (in Grenoble)

The Laboratoire d'Electronique de Technologie et d'Instrumentation (Technological and Instrumentation Electronics Laboratory), the Commissariat à l'Energie Atomique (French Atomic Energy Authority), the Institut National de Polytechnique de Grenoble (National Polytechnic Institute of Grenoble) form the research toolkit of the region and cooperated in the launch of Minatec, a research center for micro and nanotechnologies.

Lyon is home to the École Nationale Supérieure des sciences de l'Information et Bibliothèques (Higher Institute of Information and Library Sciences) which created the Institut des Sciences du Document Numérique (Institute of Digital Document Sciences), and an important network of laboratories.

The region hosts the Émile-Cohl art and design school fueling the video game industry. The Rhône-Alpes Création, SIPAREX, Sudinnova and Trinova provide venture capital for new technologies, while organizations such as EMERTEC and I-Source and Rhône-Alpes Amorce provide other sources of funding.

Important Events

NANOTEC MEETING

Professional – Every two years

33 (0)4 38 78 93 93

www.minatec.com

Next Edition: 23-27 June 2009 Grenoble

Industrial Textiles Industry

Key Figures:

Number of Jobs: 10,000

Number of Companies: 140

Sales: €1.8 billion

Industry Profile

With about 70% of national tonnage (300,000 tons/year), Rhône-Alpes is the leading region in the industry. The three main categories are manufacturers of raw materials, developers of textile fabricated products and the companies responsible for final blocking. The region is the world leader in glass and carbon production, responsible for 95% of national production, giving the region an important role in the aerospace sector.

Regional Industrial Textile Market Shares (no. of companies)

Medical: 34%

Sports and leisure: 32%
Automobile: 20%
Aeronautics: 15%
Defense and protection: 14%
Public works/civil engineering: 8%

The region's success in the industry owes itself to the strength of the research and training network centered in Écully, Roanne and Saint-Étienne. The Institut Français du Textile et de l'Habillement (French Textiles and Clothing Institute) provides technical assistance and research to professionals and establishes research platforms.

Rhône-Alpes is also home to the Centre Technique de la Teinture et du Nettoyage (Dyes and Cleaning Studies Center), specializing in industrial and household maintenance. Technicians and engineers are trained in the Lycée Diderot in Lyon and the Institut Textile et Chimique de Lyon (Textile and Chemistry Institute). Lastly, numerous university and private laboratories contribute an important research base to the industry in the region.

Important Events

Forum Nouveaux Textiles et Vetements Fonctionnels
New textiles and Functional Garments
Professional – every two years
IFTH
33 (0)4 72 86 16 05
33 (0)4 72 86 16 50
ntvf@ifth.org
vcailliez@ifth.org
Next Edition: April or November 2009

Other Important Rhône-Alpes Exhibitions

Hormatec
Horticultural and market-gardening techniques, landscaping and land architecture show
Professional – Every two years
PACKAGE ORGANISATION
33 (0)4 72 77 45 50
33 (0)4 72 77 45 77 (fax)
package@package.fr
www.package.fr
Next edition: 12-14 October 2010

Print'or
Professional Jewelry Trade Fair
Professional – Every two years
Print'or
33 (0)1 64 98 96 88
33 (0)1 64 98 97 73 (fax)
Next edition: February 2010

Aviaexpo
International General Aviation and Air Sport Show
Professional/General Public – Every two years
IDEXPO
33 (0)1 46 65 18 34
33 (0)1 46 63 26 00 (fax)
idxpo@wanadoo.fr
www.avia-expo.fr
Next edition: June 2010

Piscine
The Ultimate International Swimming Pool and Pool environment Show
Professional – Every two years
SepelCom
33 (0)4 72 22 32 53
33 (0)4 72 22 32 87 (fax)
piscine@sepelcom.com
www.piscine-expo.com
Next edition: November 2010

Vivez nature
Organic Farming – Environmental concerns and Natural Products Exhibition
General Public – Every two years
NATURALLY
33 (0)3 86 78 19 20
33 (0)3 86 78 19 21 (fax)
Next edition: December 2010

Trans Euro Logistique
Southern Europe Logistics Event
Professional – Every two years
REED Expositions
33 (0)1 47 56 50 63
33 (0)1 47 56 08 68 (fax)
alan_nobili@reedexpo.fr
www.itle.com
Next edition: December 2010

Horest concept
Developing Foodservice Brands
Professional – Every two years
SepelCom
33 (0)4 72 22 32 41
33 (0)4 72 22 32 18 (fax)
mofondeur@sepelcom.com
www.sirha.com
Next edition: 24-28 January 2009

Batinov

Building in Practice

Professional – Every two years

SepelCom

33 (0)4 72 22 32 56

33 (0)4 72 22 32 58 (fax)

batiment@sepelcom.com

www.batinov.com

Next edition: February 2009

Salon des Energies Renouvelables

Renewable Energy Exhibition

Professional – Every two years

SepelCom

33 (0)4 72 22 32 56

33 (0)4 72 22 32 58 (fax)

batiment@sepelcom.com

www.energie-ren.com

Next edition: 25-28 February 2009

Sanipolis

The Bathroom and Sanitary Fittings Trade Exhibition

Professional – Every two years

SepelCom

33 (0)4 72 22 32 56

33 (0)4 72 22 32 58 (fax)

batiment@sepelcom.com

www.sanipolis.net

Next edition: February 2009

Eurobois

Woodworking Machinery and Timber for Construction Exhibition

Professional – Every two years

SepelCom

33 (0)4 72 22 32 56

33 (0)4 72 22 32 58 (fax)

batiment@sepelcom.com

www.eurobois.net

Next edition: 25-28 February 2009

Eurotips

The Furnishing, Fitting and Wood Interior Decoration Components Exhibition

Professional – Every two years

SepelCom

33 (0)4 72 22 32 56

33 (0)4 72 22 32 58

batiment@sepelcom.com

www.eurotips.net

Next edition: 25-28 February 2009

Imagibat 2003

The exhibition for civil engineering, construction, and urban data processing

Professional – Every two years

CDO

33 (0)4 37 40 31 61

33 (0)4 37 40 31 69 (fax)

Next edition: February 2009

Sport Achat

Athletic equipment purchasing exhibition (by invitation)

Professional/General Public – Every two years

Sport Air

33 (0)4 50 09 50 95

33 (0)4 40 09 79 55 (fax)

info@sportair.fr

www.sport-achat.com

Next edition: 9, 10, 11 March 2009

Salon Européen de la Carrosserie Industrielle et du Transport

European Trade Show of Industrial Body-Building and Haulage

Professional – Every two years

COMEXPO

33 (0)1 49 09 60 74

33 (0)1 49 09 61 07 (fax)

pnard@comexpo-paris.com

www.comexpo-paris.com

Next edition: April 2009

Equipville

Urban amenities and Equipment Days

Professional – Every two years

CDO

33 (0)4 37 40 31 61

33 (0)4 37 40 31 69 (fax)

info@equipville.com

www.equipville.com

Next edition: 26-28 May 2009

Lumiville

International street lighting, light and electrical equipment show

Professional – Every two years

CDO

33 (0)4 37 40 31 61

33 (0)4 37 40 31 69 (fax)

info@equipville.com

www.equipville.com

Next edition: May 2009

Motek France

Trade fair for assembly and handling technology

Professional – Every two years

P.E. SCHALL Gambh

33 (0)4 73 61 95 57

33 (0)4 73 61 96 61 (fax)

evelyne.gisselbrecht@laposte.net

www.schall-messen.de

Next edition: May 2009

Securicom

Exhibition on Risk Prevention, Protection, and Management: prevention of crime, fire and work-related risks and computer security.

Professional – Every two years

REED Expositions

33 (0)1 47 56 50 11

33 (0)1 47 56 52 27 (fax)

raoul_mejia-rojas@reedexpo.fr

Next edition: May 2009

Europack

European exhibition of packaging, handling and logistics

Professional – Every two years

Exposium

33 (0)1 49 68 54 33

33 (0)1 49 68 54 45 (fax)

europack@exposium.fr

www.europackonline.com

Next edition: 17-19 November 2009

Artisa

Arts and Crafts trade show

General Public – Every two years

SepelCom/Alpexpo

33 (0)4 72 22 32 67

33 (0)4 72 22 32 82 (fax)

cdegove@sepelcom.com

Next edition: November 2009

Pollutec

International Exhibition for Environmental Equipment, Technology and services for Industry and Local Authorities: water, air, noise, waste techniques, recycling, energy, risk management, industrial cleaning, analysis-measurement-control, coastal protection, soils cleaning...

Professional – Every two years

REED Exhibition

33 (0)1 47 56 21 24

33 (0)1 47 56 21 10

ilse_dapper@reedexpo.fr

www.pollutec.com

Next edition: 2-5 December 2009

Sources:

<http://www.insee.fr/fr/default.asp>

OSEO and INPI

www.invest-in-france.org/

Les Chambres de Commerce et d'Industrie Rhone-Alpes