



FOCUS ON STRATEGIC SECTORS



HYDROGEN

A MASSIVE INVESTMENT PLAN TO MAKE FRANCE
A LEADING PLAYER IN THE CARBON-FREE H₂ FIELD





A MASSIVE INVESTMENT PLAN TO MAKE FRANCE A LEADING PLAYER IN THE CARBON-FREE H2 FIELD

UNPRECEDENTED BUDGET

€7 bn by 2030 with **€2bn** by 2022

BUSINESS PARTICIPATION PROCEDURES

Calls for proposals, grants, subsidized loans,
repayable advances, venture capital
ADEME • ANR • Bpifrance

AMBITIOUS OBJECTIVES

- ✓ **Make France a leading country for electrolyser and achieve 6.5GW by 2030**
- ✓ **Develop key equipment and technologies for heavy road mobility**
- ✓ **Support R&D**, large scale demonstrators and development of key components for tomorrow's new hydrogen usages
- ✓ **Use hydrogen to decarbonize industrial sites**

CALENDAR 2020 - 2022

- ✓ **Call for proposals (2020)**
Demonstrators & building blocks (€350M)
Industrial deployment (€275M)
- ✓ **IPCEI (2021)** a Franco-german and European strategy
Electrolizer gigafactory projects (€1.5Bn)
- ✓ **Call of expressions of interest (2021)**
Priority research program for H2 applications (€65M)
- ✓ **Calls for tender & production subsidies (2022)**
Full-scale production of carbon-free H2





A GROWING ECOSYSTEM FOCUSING ON NEW H2 MARKET OPPORTUNITIES

LARGE GROUPS & ENERGY SUPPLIERS



2nd H2 producer in the world



Launched its own H2 subsidiary in 2018



Specialty chemicals & high perf materials. H2 tanks



Electrolysis & energy storage technologies

START-UPS & SMES



Carbon-free H2 production



Stationary & mobile energy storage



H2 mobility



Power to gas services

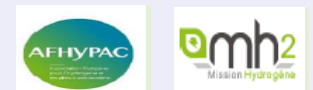
PUBLIC ACTORS (R&D, STRATEGY, LOCAL)



Public R&D centres



National agencies



Professional associations & platforms



Regional clusters





HEALTH INDUSTRY

BUILDING A NEW GLOBAL HUB
FOR HEALTH TECHNOLOGIES





FRANCE'S HEALTH MARKET : LARGE, RESILIENT AND INNOVATIVE

AN ATTRACTIVE EUROPEAN MARKET

- ✓ **2nd largest market in Europe** for medicinal products and medical devices at manufacturer prices
- ✓ **1st European country** in number of clinical trials

A KEY SECTOR FOR THE FRENCH ECONOMY

- ✓ **€90 billion** turnover
- ✓ **3rd largest export sector** with exports worth €34billion
- ✓ **455,000 jobs**

AN INNOVATIVE SECTOR

- ✓ **€6.7 billion** annual investment in R&D
- ✓ **1st European country** for public investment in health-related R&D
- ✓ **30,000 people** dedicated to research

HEALTHCARE: A FRENCH PRIORITY

- ✓ **1st OECD country** for access to healthcare
- ✓ **€200 billion** public expenditure for health
- ✓ **2694** healthcare establishments





BUILDING A NEW GLOBAL HUB FOR HEALTH TECHNOLOGIES AND PRODUCTION OF NEW MEDICINES

SECURING THE VALUE CHAIN AND BOOSTING NEW INVESTMENTS

€120 M

- ✓ Grants for new industrial projects in production capacities of therapeutic products related to COVID-19 (drugs, medical devices, diagnostics)
- ✓ Calls for proposals in 2020, 2021 and 2022

€10 Billion

- ✓ A fund for future investments for 2021-25 will support strategic sectors including the top 2 priority sectors in Health : bioproduction of innovative therapies and digital healthcare

SUPPORTING PRIVATE AND PUBLIC RESEARCH

€25 Billion

Public investment in French research system over the next 10 years, including €5Bn in health sciences

MODERNIZING HEALTH INFRASTRUCTURE

€6 Billion

- ✓ Transformation, renovation, equipment and digital remediation of medico-social establishments
- ✓ Restructuring of the healthcare offer
- ✓ Modernization of digital tools in healthcare

A REGULAR AND CONSTRUCTIVE DIALOGUE BETWEEN THE STATE AND THE HEALTHCARE INDUSTRIES

Strategic Council for the Healthcare Industries Next CSIS : July 2021

A biennial forum for reciprocal commitments

8th CSIS held in July 2018 : 48 new measures, 85% of which already effective :

- ✓ Simplified expanded access program (ATU)
- ✓ Health data hub
- ✓ Fast track clinical trials





A BOOMING ECOSYSTEM €1.8 BILLION RAISED IN 2019

200 DIGITAL HEALTH



Online and mobile booking platform



Medical video consultation site



Secure exchange of medical letters assistant



Digital health insurance platform

720 BIOTECH



Treatment in the acute phase of ischemic stroke.



Therapeutic peptides



Identification and traceability solutions for the healthcare industry



Monoclonal antibody (mAB) drug targeting BTN

886 MEDTECH



Trans-catheter mitral valve replacement



Disruptive DNA synthesis
Raised 46 M€ in July



Genomic medicines for the treatment of blinding inherited retinal diseases.+
44.5 M€ in October



Wearable systems of epileptic diagnosis





AGRI-FOOD INDUSTRY

TOWARDS A SECURE, MODERNE
& SUSTAINABLE AGRO-INDUSTRY





FRENCH AGRIFOOD INDUSTRY: A MAJOR GLOBAL MARKET

A MAJOR PLAYER IN FRENCH & GLOBAL MARKET

- ✓ 13% total French merchandise exports
- ✓ 5th largest exporter of food product
- ✓ Agrifood generates 3rd largest trade surplus with €7,8 billion

AN INNOVATIVE SECTOR

- ✓ One of the most innovative country in food sector with 3000 new products every year
- ✓ €645 M budget allocated to higher education and research in 2021, excluding staff cost
- ✓ 10 competitiveness clusters, public research centers (Inrae, Ifremer,..) , universities, specialized training institutes
- ✓ 1.200 researchers

AN ATTRACTIVE MARKET

€224 bilion revenue

- ✓ 70% of the agricultural production is transformed
- ✓ 1st European grower : 18% of European agricultural production
- ✓ Agrifood generates 3rd largest trade surplus with €6,6 billion

A NETWORK OF TALENTED WORKFORCE

- ✓ 54,800 companies
- ✓ 600,600 employees
- ✓ 805 agricultural training establishments, including 18 higher education





TOWARDS A NEW MODEL : SECURE, MODERN AND SUSTAINABLE AGRO-INDUSTRY (2020-2022)

STRENGTHEN INVESTMENT TO SUPPORT THE STRUCTURING OF EMERGING SECTORS

€364 M

- ✓ Relocation of strategic productions and modernization of agricultural & agri-food sectors.
- Including **€230 M**
- ✓ Slaughterhouse and animal husbandry modernization plan (biosecurity).
- €100 M**
- ✓ A national strategy on plant protein
- ✓ Strengthen investment to support the structuring of sectors to develop and integrate these new productions
- ✓ Support R&D in this area

AGROECOLOGY TRANSITION AND STRONGER COMPETITIVENESS

€186 M

- ✓ Premium for the conversion of agricultural equipment to invest in more resource-efficient tools and focus on innovation to reduce phytosanitary products
- Including **€160 M**
- ✓ Agro-equipment conversions bonus and acceleration program for agro-equipment companies Investment to support the structuring of sectors to produce news products
- €120 M**
- ✓ support as part of the "Fund for future investments" program (PIA) for agricultural equipment companies that design and manufacture this equipment to promote innovation and adaptation of equipment to new uses

FOOD BETTER ACCESS AND HEALTHY

€200 M

- ✓ Support for school canteens
- ✓ Support local communities
- ✓ "Paniers Fraicheur" program
- ✓ Other programs

BUILDING A SUSTAINABLE MODEL



€300 M

- ✓ Aid for investments to protect against climatic hazards (equipment, resource management) including **€20 M** for the wood industry





A PUBLIC AND PRIVATE ECOSYSTEM FOCUSING ON STRUCTURING

LARGE GROUPS	START-UPS	PUBLIC AND PRIVATE ACTORS (R&D, STRATEGY, LOCAL SUPPORT)
 Dairy processing	 World leader in the breeding of insects for animal nutrition	 Minister of Agriculture
 Dairy processing	 Urban farm operation services	 National association of agro-food industries
 Cooperative Group, production & processing of cereals	 World leader in microalgae food	 10 competitiveness poles
 Manufacture and distribution of wines and spirits)	 Digital solutions for food traceability	 National research institute for agriculture, food and the environment





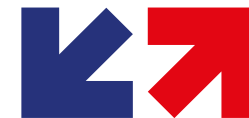
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GOUVERNEMENT

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