

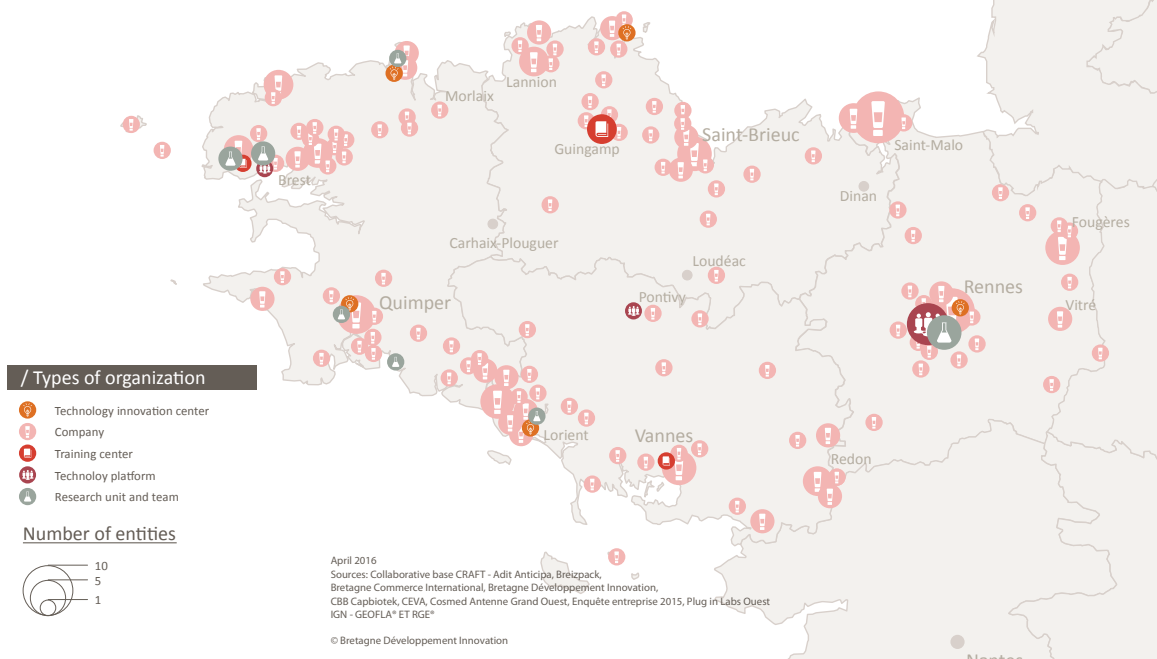
A RICH AND DIVERSE ECOSYSTEM

Behind Yves Rocher, the world-renowned plant cosmetics business firmly established in the region*, hides a multitude of industry players with unique capabilities. Many work for big international brands.

*2nd ranking industrial employer in Bretagne (not including agrifood), 3 production plants achieving 85% of the group's sales

Our region offers a comprehensive ecosystem ranging from packaging, make-up accessories, algae extracts and lipstick to academic research to industrial production.

BRETAGNE'S COSMETICS ECOSYSTEM



KEY FIGURES COSMETICS IN BRETAGNE

€1.8 BILLION in sales
NEARLY 6,000 EMPLOYEES
Top region in France for marine cosmetics
ONE OF THE WORLD'S FIRST suppliers of marine ingredients for cosmetics

A STRONG NETWORKING APPROACH...



CLOSE TO 40 technology innovation centers and platforms

NATIONAL RESEARCH ORGANIZATIONS

very present in the region
 Established in Bretagne are: CNRS, Ifremer, INRAE, INSERM, ... and linked to regional universities, university hospitals and grandes écoles

3 marine biology stations
 Concarneau, Dinard and Roscoff

BUSINESS INCUBATORS available across Bretagne within a network of 7 technology parks



A NETWORK OF INNOVATION AND BUSINESS SUPPORT CENTERS

- . Algae: CEVA
- . Biotechnologies: Biotech Santé Bretagne
- . Packaging: Breizpack
- . Maritime: Pôle Mer Bretagne Atlantique
- . Health: Biotech Santé Bretagne
- . Export: Bretagne Commerce International
- And a local representation of the national cosmetics network:
 - . COSMED, local branch of the national cosmetics association for SMEs

...AND INDUSTRIAL PROJECTS

MANY INDIVIDUAL AND COLLABORATIVE PROJECTS receive public and private funding

167 FIRMS operate in the industry, with half recording 50% of their sales in cosmetics

Conception graphique et illustrations : www.nellyandre.com | crédits photo : © Emmanuel Pain pour Bretagne Développement Innovation, © Nicolas Job

COSMETICS BEAUTY AND INNOVATION FROM COAST TO COAST



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BRETAGNE DÉVELOPPEMENT INNOVATION



COSMETICS IN BRETAGNE BUILDING ON A WEALTH OF NATURAL RESOURCES

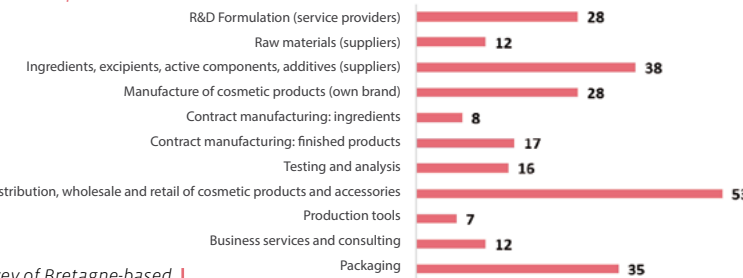


Bretagne is a region in Western France where its 2,730km-long coastline and strong maritime tradition are unique assets for the local economy. Over time, the region has developed a *savoir-faire* in thalassotherapy and learned how to exploit its marine and plant resources. This has led it to build what is today a thriving and pioneering cosmetics industry.

In 1899, the first thalasso spa was founded in Roscoff, paving the way to a new cosmetics industry in the region. A hundred and twenty years on, we have almost 170 firms working in cosmetics, from raw materials provision to formulation and packaging. This has made Bretagne France's top region for marine cosmetics and one of the world's leading suppliers of marine ingredients.

FROM FORMULATION TO PACKAGING SPECIALIST FIRMS SPANNING THE VALUE CHAIN

Distribution of companies across the value chain
Number of companies. Companies may be positioned on various professions



Source: Survey of Bretagne-based cosmetics companies in 2015 (CBB Capbiotek/BDI)

A VIBRANT INDUSTRY

- **Cosmetics giant**, Yves Rocher employing 3,500 staff across Bretagne
- **Suppliers** for some of the biggest international cosmetics brands
- **A growth sector**: almost half of the firms were created since the year 2000
- **Massive and ongoing investment** (R&D, manufacturing)
- **Companies** resolutely outward looking (61% export) and often award-winning for their innovations.



WIDESPREAD INNOVATION

A SOLID RESEARCH AND TRAINING NETWORK

In Bretagne, a dense network of researchers and students is available to support the region's cosmetics industry and its innovation efforts. The main research teams for marine biotech are based here.

Across Bretagne, there is a range of courses from 2-year vocational diplomas to post-graduate study covering all the cosmetics professions: from raw materials provision and R&D in chemistry or biotech to formulation and beauty services.

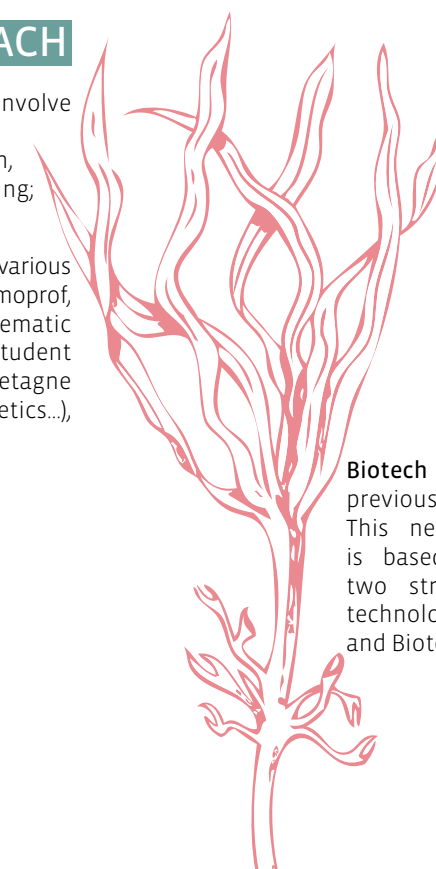


A STRONG COLLABORATIVE APPROACH

Within the region, it is straightforward to involve the public and private sectors in:

- Promoting our capabilities in formulation, packaging, marine bioresources and testing;
- Fostering innovation.

This includes joint attendance at various international trade shows (In-Cosmetics, Cosmoprof, Beautyworld...) and events in the region: thematic events and training sessions (COSMED, student competitions (U'Cosmetics), trade shows (Bretagne Beauty), conferences (COSM'ING, U'Cosmetics...), business conventions.



Biotech Santé Bretagne A PARTNER AT THE HELM

TECHNOLOGY TRANSFER CENTER EXPERTISE IN INGREDIENTS

Biotech Santé Bretagne has been helping cosmetics firms develop their innovations.

As a partner of associations and national cosmetics hubs (COSMED, SFC, Cosmetic Valley...), Biotech Santé Bretagne runs the network of regional cosmetics stakeholders and supports them in their research endeavors: biobased packaging, active ingredients obtained through sustainable processes, molecule screening, rheology...

The center organizes the first and only conference on cosmetic ingredients and biotechnology (COSM'ING). Since its inception 20 years ago, the event has gathered around 200 delegates every year in Saint-Malo, featuring a B2B meeting day and 2-day symposium.

Biotech Santé Bretagne was created out of two previous centers (ID2Santé and CBB Capbiotek). This new unique and expert organization, is based on the long-time skills of these two structures that had been supporting technological innovation in the fields of Health and Biotechnology for 30 years in Bretagne.

9th COSM'ING 2021
Cosmetic ingredients & biotechnology

FINAL DATES
30 JUNE
to 2 JULY
Palais du Grand Large
SAINT-MALO
FRANCE

- **ONE DAY** of B2B meetings
- **TWO DAYS** of conferences