



2017 ORECE SURVEY
OF FOREIGN DIRECT INVESTMENT IN HAUTS-DE-FRANCE

HAUTS-DE-FRANCE: OPEN TO THE WORLD

SEPTEMBER 2017

ORECE - Observatoire Régional des Entreprises à Capitaux Etrangers



KEY FIGURES

ON DIRECT FOREIGN INVESTMENT
IN HAUTS-DE-FRANCE

Source: ORECE* / URSSAF

1,857 establishments

or 1.5% of the total establishments in the region

141,000 employees

or 10% of the region's paid jobs

35% of the region's manufacturing jobs

5% of the region's tertiary jobs

69%

of the workforce employed in foreign groups works in manufacturing, 31% in the tertiary sector (services and trade)

20% of foreign-owned establishments have more than 100 employees

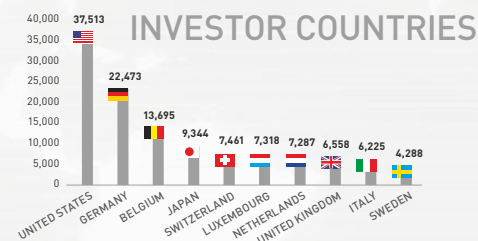
and account for 76% of the employees of foreign-invested enterprises



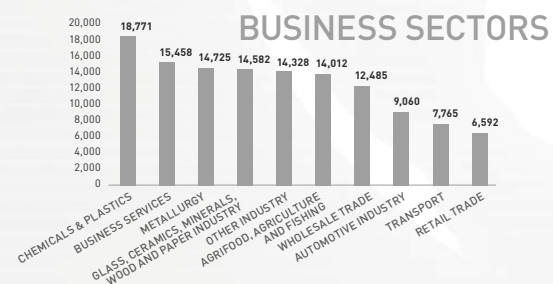
TOP 10 JOBS

Sources: ORECE 2016

INVESTOR COUNTRIES



BUSINESS SECTORS



AT THE NATIONAL LEVEL

France ranks 3rd among economically developed countries in the UNCTAD's world ranking of countries hosting direct foreign investment, behind the United States and the United Kingdom, and 7th when developing countries are included (China, Hong Kong, Singapore, and Brazil). According to INSEE, France is home to 22,571 branches of foreign groups, totalling nearly 1.8 million people, which represents 12% of the country's workforce, 19% of its GDP, and 30% of its exports.

Sources: UNCTAD 2017, Business France 2017



METHODOLOGY

In this study, a foreign-invested company is a company whose main shareholder is foreign and owns at least 50% of the capital. Several sources were used to produce this study, including the business files of Hauts-de-France CCI and Nord France Invest. Some service activities (or secondary establishments) were not taken into account. For retail businesses, only the head office was considered. The geographical divisions are the CCI territories.

* ORECE: Regional Observatory of Foreign-Invested Enterprises

FOREIGN DIRECT INVESTMENT IN HAUTS-DE-FRANCE: OPEN TO THE WORLD

Foreign subsidiaries represent only 1% of companies in France, yet they contribute significantly to our country's economy.

In Hauts-de-France, these subsidiaries are even more heavily involved in our region's economic vitality and its internationalization, accounting for up to 24% of the region's turnover and 47% of its exports.

It is especially noteworthy in the manufacturing industry, where they generate more than a third of the region's turnover and more than half of its exports. This provides a wonderful boost for employment in our region. In 2016 alone, nearly 4,600 jobs were created or protected in Hauts-de-France, following new foreign investments. In terms of global competition, Hauts-de-France attracts and retains foreign investments. Our territory has been one of the top 3 most attractive regions in France for the past 20 years.

We have adopted a proactive policy for coming out ahead in terms of employment and increasing our attractiveness, namely through the help of our regional agency Nord France Invest. With NFI, we have equipped ourselves with a genuine decision accelerator and project support, bringing together all of the players involved in the setting up of new businesses. It's really paying off. The recent setting up of a new affiliate of the chinese company BYD, which will create at least 100 jobs in Allonne, Oise, is yet more proof of this.

These foreign groups, which have chosen Hauts-de-France, are also our most ardent ambassadors: 85% of foreign companies interviewed by KPMG say that they recommend Hauts-de-France to project managers. Our region also boasts an effective pro-business and pro-jobs policy with customized support for companies. The region serves as a facilitator for all seeking to invest in Hauts-de-France.



Xavier BERTRAND
President of the
Hauts-de-France Region



Karine CHARBONNIER
Vice President in charge
of Training and Corporate
Relations

The Hauts-de-France region has 1,857 foreign-owned establishments employing 141,000 employees. That means that 10% of the region's workforce works for a foreign company. While naysayers may point out the fragility of our economic fabric, the stable and ongoing presence and investment of these companies in particular confirms the real attractiveness of the Hauts-de-France with heightened risks of relocation. They are not wrong, but they also should not forget that the takeovers of struggling regional companies by foreign investors have consequently allowed hundreds of jobs to be kept in our territory.

This is also a wonderful opportunity for our productive ecosystem to move upmarket by attracting new talent and stimulating innovation. Faced with these challenges, the Regional Board and the region's CCI are working in close collaboration to maintain and to highlight the policy of the Hauts-de-France to attract investors, especially considering that opportunities to attract new foreign investments are abundant, particularly due to Brexit.



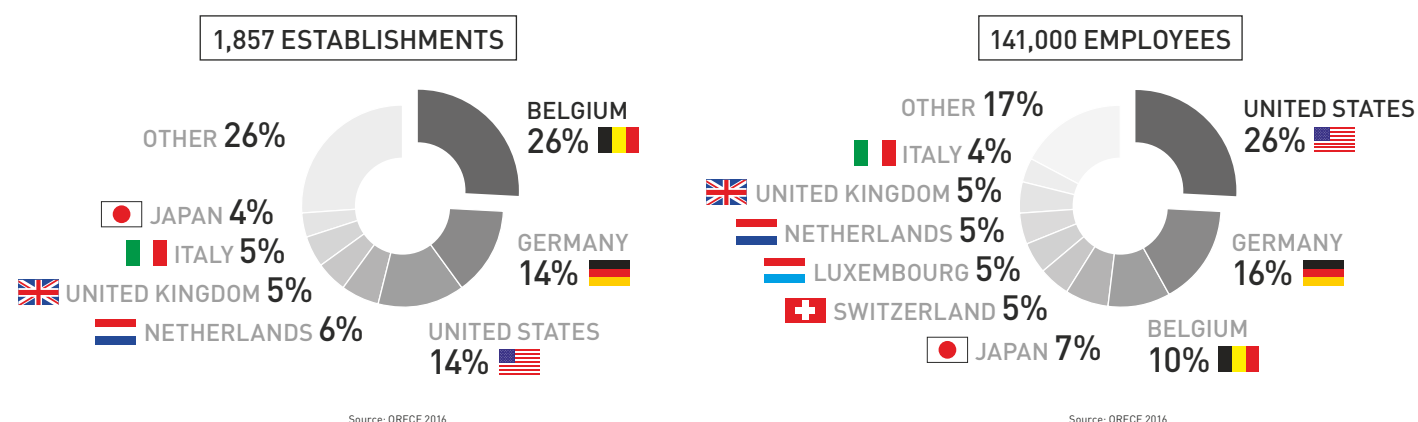
Philippe HOURDAIN
President
CCI for Hauts-de-France

1. ORIGIN OF INVESTORS

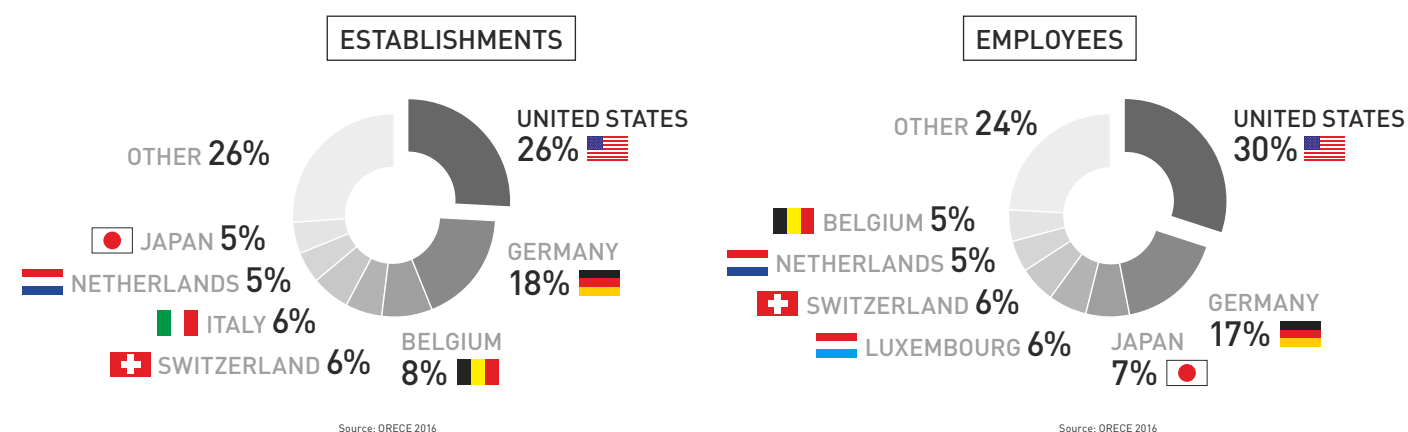
45 nationalities are represented among foreign companies in the Hauts-de-France region. The United States, Belgium, and Germany form the top 3 in the rankings in terms of both workforce and establishments.

The European Union is very highly represented, with 1,411 establishments and 86,634 employees, or 76% and 61% of the total, respectively. Outside of the EU, the United States and Japan are most prevalent in our region, with 26% and 7% of the employees, respectively.

DISTRIBUTION BY NATIONALITY OF THE MAIN SHAREHOLDER



DISTRIBUTION BY NATIONALITY OF THE MAIN SHAREHOLDER (ESTABLISHMENTS WITH 100 OR MORE EMPLOYEES)



There are 369 sites with 100 [or more] employees, which represent 20% of the total number of foreign-owned establishments in Hauts-de-France. They employ 106,728 people, or 76% of the total workforce. The United States and Germany have many large companies. Conversely, Belgian-owned establishments are rather small organisations.

RANKING OF FOREIGN COMPANIES BY NATIONALITY, ACCORDING TO NUMBER OF EMPLOYEES

NATIONALITY OF INVESTMENT	EMPLOYEES	ESTABLISHMENTS
UNITED STATES	37,513	253
GERMANY	22,473	262
BELGIUM	13,695	490
JAPAN	9,344	74
SWITZERLAND	7,461	68
LUXEMBOURG	7,318	51
NETHERLANDS	7,287	120
UNITED KINGDOM	6,558	93
ITALY	6,225	86
SWEDEN	4,288	37
CANADA	3,263	17
IRELAND	2,249	64
SPAIN	2,033	34
CHINA	1,999	31
DENMARK	1,998	25
FINLAND	999	12
INDIA	895	10
AUSTRIA	746	13
NORWAY	683	16
MONACO	513	3
OTHER	3,431	98
GRAND TOTAL	140,971	1,857

Source: ORECE 2016

INVESTMENT PROJECTS OVER THE PAST FIVE YEARS (2012-2016)

NATIONALITY	JOB	OF WHICH ACQUISITIONS	PROJECTS
UNITED STATES	10,318	6,306	47
GERMANY	2,026	401	52
UNITED KINGDOM	1,438	0	38
BELGIUM	1,424	394	56
NETHERLANDS	1,043	592	20
ITALY	916	249	31
JAPAN	684	0	20
CHINA	671	573	10
AUSTRIA	468	450	3
CANADA	456	75	9
SWEDEN	438	0	8
INDIA	414	365	4
LUXEMBOURG	380	0	8
IRELAND	339	272	5
SWITZERLAND	312	0	9
OTHER	893	324	32
GRAND TOTAL	22,220	10,001	352

Source: ORECE 2016

In five years, more than 22,000 jobs were created or saved in Hauts-de-France. Accounting for nearly 50% of jobs created or saved, the United States is by far the top foreign investor in the region over the past five years. In addition to the takeover of Arc International by Peaked Hill Partners in 2015 (5,144 saved jobs), US companies are behind mega-installations, such as IBM, Amazon, and Booking, totalling nearly 3,000 created jobs. Western Europe (Germany, United Kingdom, and Benelux) is also highly visible, with nearly 6,000 created or maintained jobs.

TOP 8 INVESTOR COUNTRIES

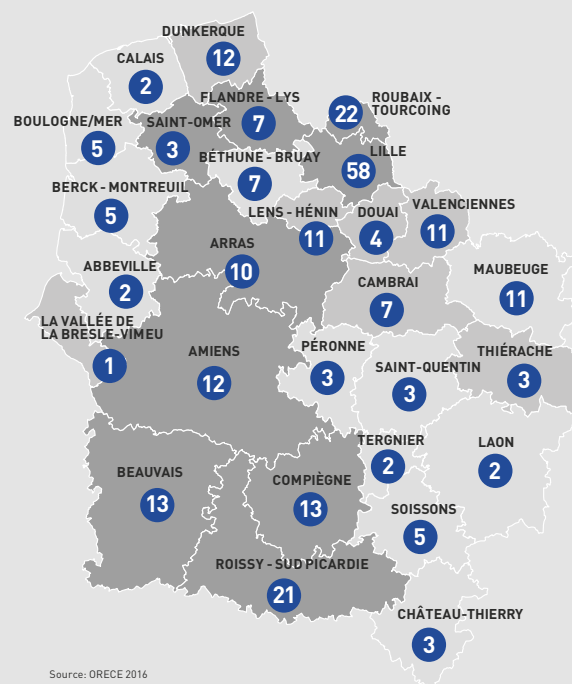
#1 UNITED STATES

37,513 EMPLOYEES 253 ESTABLISHMENTS

Twenty establishments account for half of the employees of US establishments, with more than 6,000 in two glass manufacturers (Arc and Saverglass) and 1,300 in an agricultural machinery manufacturer (AGCO). The United States has a strong presence in Picardy, particularly in the manufacturing sector.

TOP 5

1. **ARC FRANCE**, Arques, 5,052 employees, Hollow glass manufacturing
2. **AGCO SAS**, Beauvais, 1,333 employees, Forestry and agricultural machinery manufacturing
3. **SAVERGLASS**, Feuquières, 1,250 employees, Hollow glass manufacturing
4. **PROCTER & GAMBLE AMIENS**, Amiens 1,015 employees, Manufacturing of soaps, detergents, and cleaning products
5. **GROUPEMENT INTERNATIONAL MÉCANIQUE AGR**, Beauvais, 927 employees, Manufacturing of other automotive equipment



PER EMPLOYMENT ZONE

Number of employees - 100 100-500 500-1000 + 1000

Number of sites 99

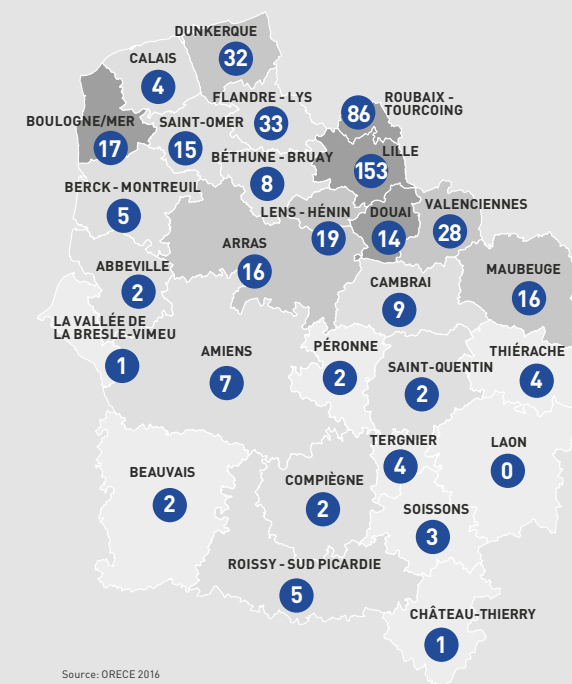
#3 BELGIUM

13,695 EMPLOYEES 490 ESTABLISHMENTS

Belgian-owned establishments are mainly located near the border, primarily in the Lille metropolitan area. The average of 28 employees per establishment masks the high disparities between a few large companies and some small sites. In terms of activity, Belgian companies are focused in wholesale trade and services.

TOP 5

1. **SBE ONLINE**, Saint Léonard, 683 employees, Manufacturing of assembled electronic boards
2. **LA VOIX DU NORD**, Lille, 386 employees, Newspaper publishing
3. **NYRSTAR**, Aubry, 330 employees, Metal smelting and alloy production
4. **AB INBEV**, La Madeleine, 238 employees, Beer wholesale trade
5. **AGFA GEVAERT**, Pont à Marcq, 231 employees, Production of products for the graphics industry



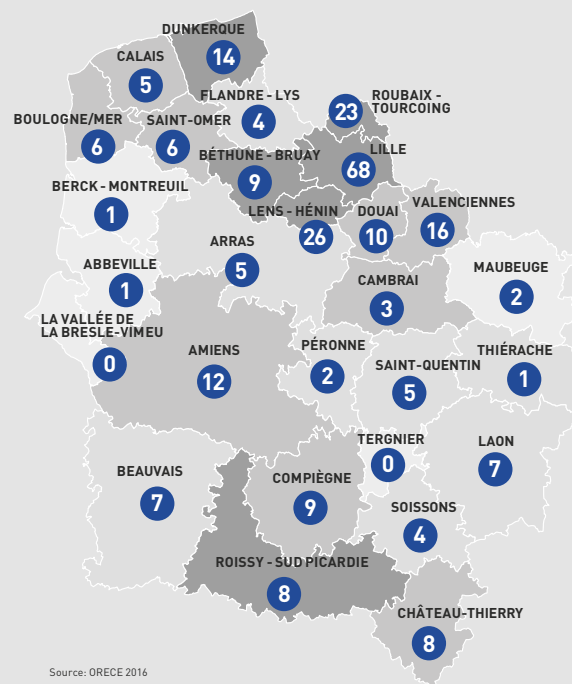
#2 GERMANY

22,473 EMPLOYEES 262 ESTABLISHMENTS

The 20 largest sites belonging to Germany investors account for 45% of the workforce. Business services represent the most employees (in metallurgy and chemicals), notably with the Arvato call centres (multiple sites in the region and a headquarters in Vendin-le-Vieil). Germany has an especially strong presence in Nord and much less so in Picardy.

TOP 5

1. **ASF ARVATO SERVICES FRANCE**, Vendin Le Vieil, 2,428 employees, Call centre activities
2. **VOLKSWAGEN FRANCE**, Villers-Cotterets, 699 employees, Headquarters of Volkswagen France
3. **BAYER HEALTHCARE SAS**, Loos, 650 employees, Manufacturing of pharmaceutical preparations
4. **CAPDUNE (GROUPE ARVATO)**, Coudekerque Branche, 556 employees, Business and other management consultancy activities
5. **DILLINGER**, Grande Synthe, 541 employees, Steelmaking



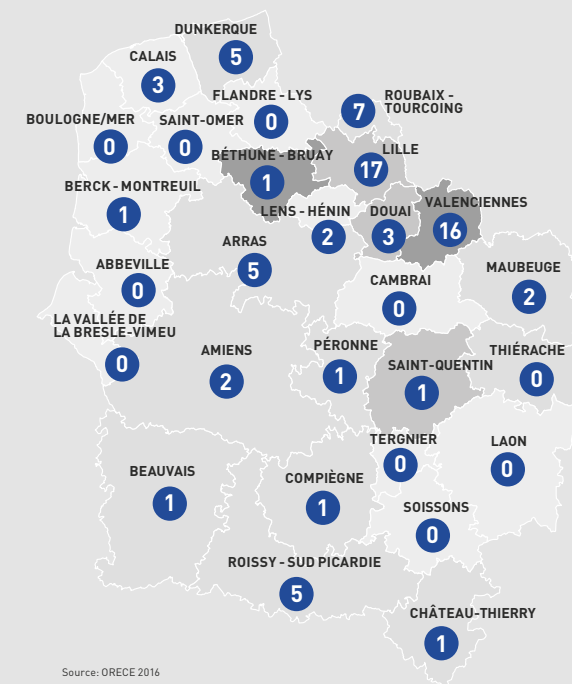
#4 JAPAN

9,344 EMPLOYEES 74 ESTABLISHMENTS

Just the Toyota plant in Onnaing represents a third of Japan's employee's in the region. Accordingly, the automotive industry makes up nearly 50% of the workforce, and the ten largest sites account for 72% of the jobs. Although Nord accounts for the majority of Japanese investments, there are also some major establishments in Picardy, like MBK in Rouvroy (Yamaha Group) and Ajinomoto Eurolysine in Amiens.

TOP 5

1. **TOYOTA MOTOR MANUFACTURING FRANCE**, Onnaing, 3,094 employees, Automotive manufacturing
2. **BRIDGESTONE FRANCE**, Béthune, 1,297 employees, Tyre manufacturing and retreading
3. **MBK INDUSTRIE**, Rouvroy, 690 employees, Motorcycle manufacturing
4. **AJINOMOTO EUROLYSINE**, Amiens, 304 employees, Manufacturing of basic pharmaceuticals
5. **TOYOTA BOSHOKU SOMAIN**, Somain, 286 employees, Manufacturing of other automotive equipment



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TOP 8 INVESTOR COUNTRIES

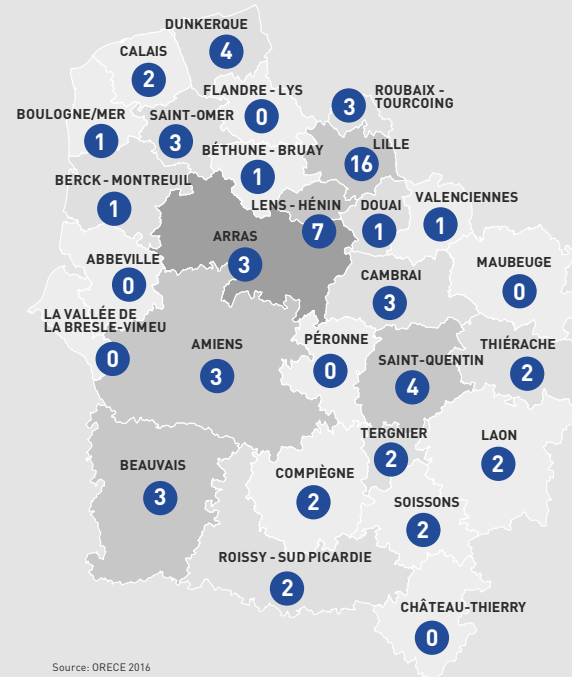
#5 SWITZERLAND

7,461 EMPLOYEES 68 ESTABLISHMENTS

The top 10 Swiss sites account for 55% of the employees. The agrifood sector employs the majority of the people (52%), particularly thanks to Herta, Nestlé, and Cemoi. Most Swiss investments are focused in Nord, but Beauvais and Saint-Quentin stand out in Picardy.

TOP 5

1. **HERTA**, Saint Pol sur Ternoise, 990 employees, Industrial preparation of meat products
2. **NESTLÉ GRAND FROID - NGF**, Beauvais, 456 employees, Manufacturing of ice cream and sorbets
3. **NESTLÉ FRANCE BOUE**, Boue, 407 employees, Manufacturing of other dairy products
4. **AUTONEUM FRANCE**, Ons-en-Bray, 351 employees, Manufacturing of other automotive equipment
5. **CÉMOI CONFISEUR**, Villeneuve d'Ascq, 327 employees, Manufacturing of cacao, chocolate, and confectionery products



PER EMPLOYMENT ZONE

Number of employees - 100 100-500 500-1000 + 1000

Number of sites 99

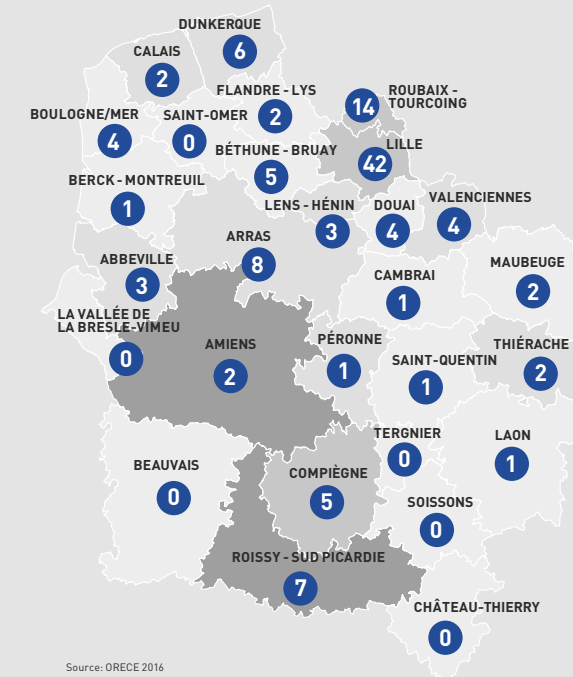
#7 NETHERLANDS

7,287 EMPLOYEES 120 ESTABLISHMENTS

The top 10 Dutch sites account for 57% of the employees. The Netherlands specialises in aeronautics, with Stelia Aerospace, which manufacturers nose fuselages for Airbus. They have a strong presence in Picardy, particularly in the employment zones of Roissy-Sud Picardy and Amiens.

TOP 5

1. **STELIA AEROSPACE**, Méaulte, 1,437 employees, Space and aeronautics manufacturing
2. **CNH FRANCE**, Le Plessis Belleville, 499 employees, Unrefrigerated storage and warehousing
3. **AKZO NOBEL DECORATIVE PAINTS FRANCE**, Montataire, 350 employees, Manufacturing of paints, varnishes, inks, and sealants
4. **DAILYCER FRANCE**, Faverolles, 340 employees, Other grain work activities
5. **UNILEVER FRANCE**, Le Meux, 301 employees, Manufacturing of cosmetics (toothpaste)



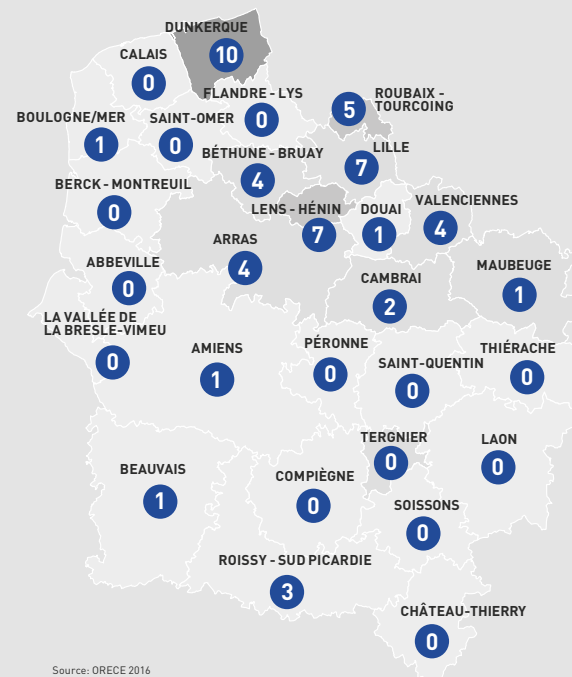
#6 LUXEMBOURG

7,318 EMPLOYEES 51 ESTABLISHMENTS

80% of the workforce is concentrated in 10% of the establishments, and Luxembourg features among the top ranked foreign investors in the region thanks to 3,600 employees at two Arcelor Mittal sites in Grande-Synthe. In total, metallurgy alone represents 63% of the employees of Luxembourg-owned companies in the region.

TOP 5

1. **ARCELOR MITTAL DUNKERQUE**, Grande Synthe, 3,031 employees, Steelmaking
2. **ARCELOR MITTAL MARDYCK**, Grande Synthe, 569 employees, Steelmaking
3. **CAMALIEU INTERNATIONAL**, Roubaix, 506 employees, Retail trade of clothing in specialised stores
4. **APERAM STAINLESS France**, Isbergues, 416 employees, Steelmaking
5. **OMS SYNERGIE NORD**, Seclin, 300 employees, Routine cleaning of buildings



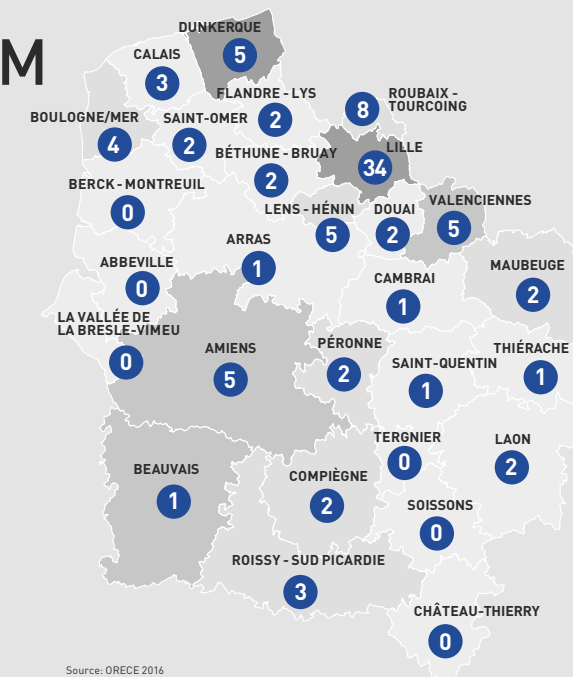
#8 UNITED KINGDOM

6,558 EMPLOYEES 93 ESTABLISHMENTS

The top 10 sites make up 62% of the workforce of UK companies in the region. Employees are distributed evenly among metallurgical sector, pharmaceutical industries, materials industries, wholesale trade, and retail trade. The UK has an especially strong presence in the Lille metropolitan area and in Dunkirk. In Picardy, Beauvais and Amiens are well represented.

TOP 5

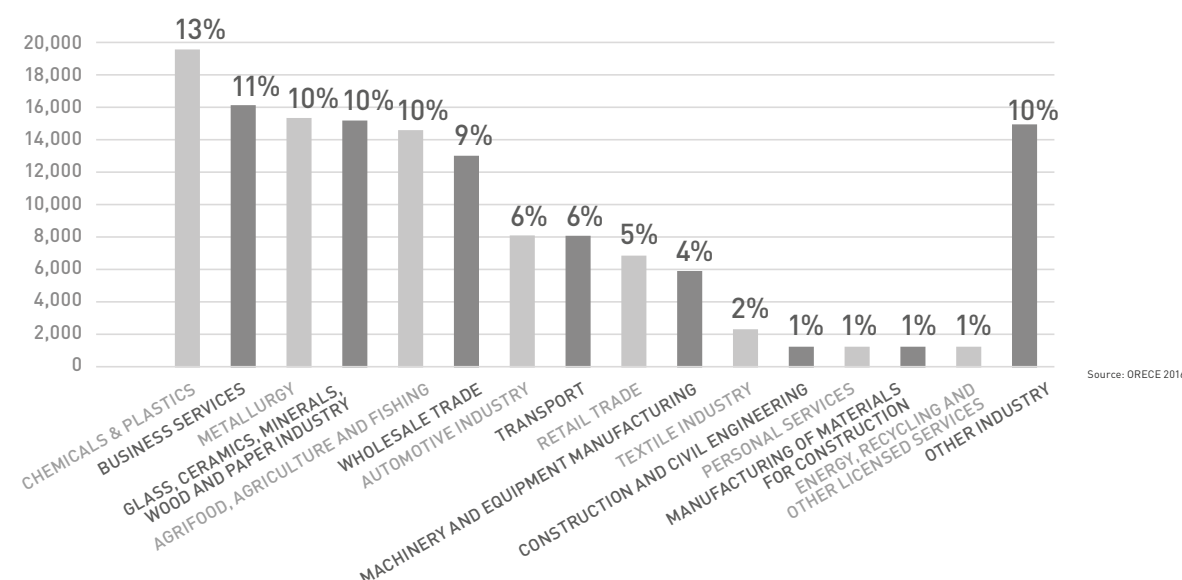
1. **CASTORAMA FRANCE**, Templemars, 796 employees, Retail trade of hardware, paints, and glass in superstores
2. **GLAXOSMITHKLINE BIOLOGICALS**, Saint Amand Les Eaux, 648 employees, Manufacturing of pharmaceutical preparations
3. **ALUMINIUM DUNKERQUE**, Loon Plage, 646 employees, Aluminium manufacturing
4. **RS ET RADIOSPARES - RS COMPONENTS SAS**, Beauvais, 514 employees, Distributor of electronic components
5. **ASTRAZENECA DUNKERQUE PRODUCTION**, Dunkerque, 390 employees, Manufacturing of pharmaceutical preparations



2. BUSINESS SECTORS

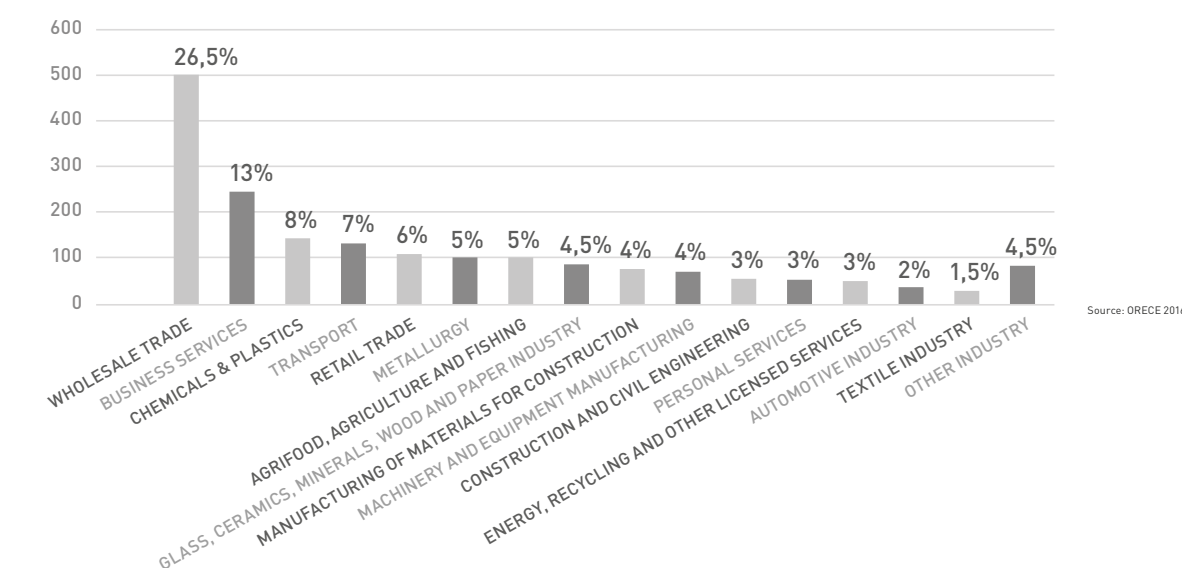
Manufacturing accounts for two-thirds of the employees working for foreign-owned companies, with a large majority in four sectors: chemicals and plastics, metallurgy, materials, and agrifood. Outside of manufacturing, business services ranks highest with more than 15,000 employees (11% of the total).

DISTRIBUTION OF THE 140,971 EMPLOYEES



In terms of the number of business establishments, wholesalers clearly dominate (27% of establishments), closely followed by business services (13% of establishments).

DISTRIBUTION OF 1,857 ESTABLISHMENTS



DISTRIBUTION OF THE MAIN SECTORS BY NATIONALITY

CHEMICALS/PLASTICS

142 ESTABLISHMENTS 18,771 EMPLOYEES

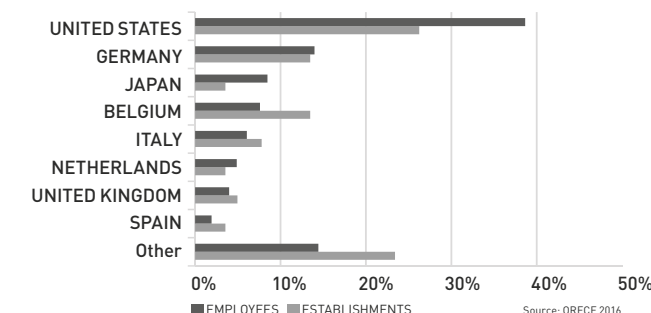
The sector is largely controlled by the United States, notably with Procter & Gamble and Dunlop factories in Amiens and Colgate in Compiègne. Germany ranks second with a collection of medium-sized establishments. Japan's third-place position is explained primarily by Bridgestone (Béthune), which is the sector's largest site in the region.

TOP 5

- 1. BRIDGESTONE France**, 1 297 employees, Béthune, Tyre manufacturing and retreading
- 2. PROCTER & GAMBLE Amiens**, 1 015 employees, Amiens, Manufacturing of soaps, detergents, and cleaning products
- 3. DUNLOP**, 926 employees, Amiens, Tyre manufacturing and retreading
- 4. COLGATE-PALMOLIVE INDUSTRIEL**, 594 employees, Compiègne, Manufacturing of perfumes and toiletries
- 5. BASF AGRI PRODUCTION**, 518 employees, Gravelines, Manufacturing of pesticides and other agrochemical products

CHEMICALS/PLASTICS

DISTRIBUTION OF JOBS / ESTABLISHMENTS BY INVESTMENT ORIGIN



BUSINESS SERVICES

242 ESTABLISHMENTS 15,458 EMPLOYEES

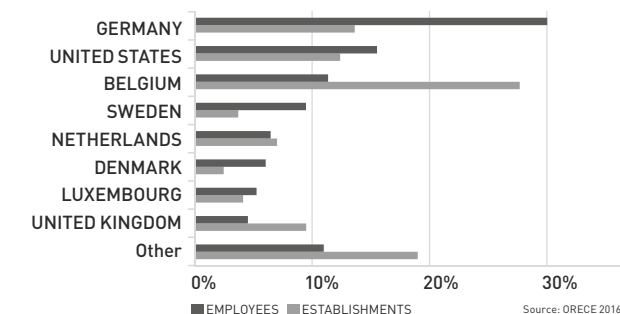
Although Belgium has more establishments, Germany dominates in terms of the number of employees, with the Arvato site in Vendin-Le-Vieil (2,500 employees) and the Capdune site in Coudekerque (550 employees). The call centre specialisation is also apparent in the Amiens metropolitan area and in Oise, with Webhelp Compiègne.

TOP 5

- 1. ASF ARVATO SERVICES France**, 2 428 employees, Vendin Le Vieil, Call centre activities
- 2. WEBHELP Compiègne**, 600 employees, Lacroix-Saint-Ouen, Call centre activities
- 3. CAPDUNE (groupe ARVATO)**, 556 employees, Coudekerque Branche, Business board and other management boards
- 4. ISS PROPRETE Sains en Gohelle**, 546 employees, Sains en Gohelle, Standard cleaning of buildings
- 5. DUACOM**, 520 employees, Douai, Call centre activities

BUSINESS SERVICES

DISTRIBUTION OF JOBS / ESTABLISHMENTS BY INVESTMENT ORIGIN



METALLURGY

101 ESTABLISHMENTS 14,725 EMPLOYEES

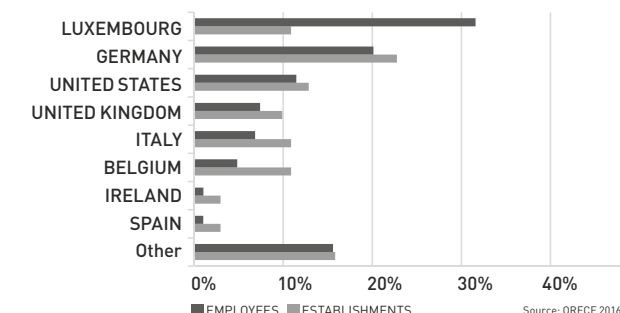
Although Luxembourg ranks highest in terms of the number of employees with Arcelor Mittal in Grande-Synthe, Germany has the most establishments in the region. The United States, Italy, and Belgium round out the top 5.

TOP 5

- 1. ARCELOR MITTAL Dunkerque**, 3 031 employees, Grande Synthe, Steelmaking
- 2. ALUMINIUM Dunkerque**, 646 employees, Loon Plage, Aluminium metallurgy
- 3. EJ Picardie**, 616 employees, Saint-Crepin-Ibouwillers, Manufacturing of other metal items
- 4. ARCELOR MITTAL MARDYCK**, 569 employees, Grande Synthe, Steelmaking
- 5. DILLINGER France**, 541 employees, Grande Synthe, Steelmaking

METALLURGY

DISTRIBUTION OF JOBS / ESTABLISHMENTS BY INVESTMENT ORIGIN





GLASS, CERAMICS, MINERALS, WOOD, AND PAPER INDUSTRY

86 ESTABLISHMENTS 14,582 EMPLOYEES

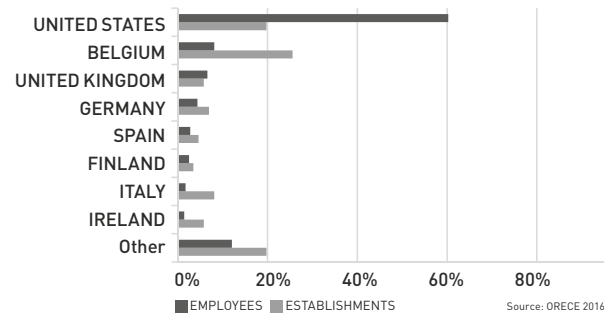
Although Belgium ranks highest in terms of the number of establishments, the United States has the most employees with the Arc (5,000 employees), Saverglass (1,250 employees), and Verescence (830 employees) sites.

TOP 5

- 1. ARC France**, 5 052 employees, Arques, Hollow glass manufacturing
- 2. SAVERGLASS**, 1 250 employees, Feuquières, Hollow glass manufacturing
- 3. VERESCENCE**, 827 employees, Mers les Bains, Hollow glass manufacturing
- 4. VKR France**, 400 employees, Feuquières-en-Vimeu, Framing and joinery
- 5. WEPA Lille**, 376 employees, Bousbecque, Manufacturing of sanitary and domestic paper goods

GLASS, CERAMICS, MINERALS, WOOD, AND PAPER INDUSTRY

DISTRIBUTION OF JOBS / ESTABLISHMENTS BY INVESTMENT ORIGIN



AGRIFOOD

101 ESTABLISHMENTS 14,012 EMPLOYEES

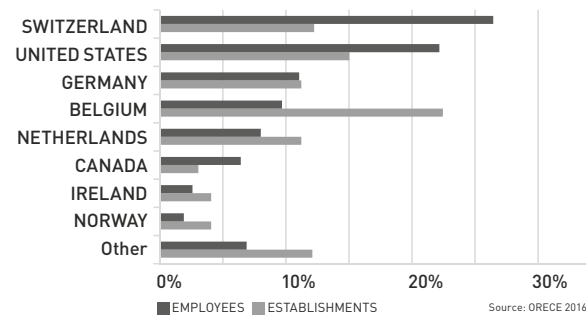
Belgium has the most establishments, but relatively few employees relative to the United States and Switzerland, which ranks highest in terms of the number of employees, particularly due to the Herta site in Saint-Pol-sur-Ternoise (990 employees) and the Nestlé site in Beauvais (460 employees).

TOP 5

- 1. HERTA**, 990 employees, Saint Pol Sur Ternoise, Industrial preparation of meat products
- 2. MC CAIN ALIMENTAIRE**, 589 employees, Harnes, Potato processing and conservation
- 3. HAAGEN DAZS Arras**, 492 employees, Tilloy Les Mofflaines, Manufacturing of ice cream and sorbets
- 4. MOY PARK France Hénin Beaumont**, 461 employees, Hénin Beaumont, Manufacturing of prepared meals
- 5. NESTLÉ GRAND FROID - NGF**, 456 employees, Beauvais, Manufacturing of ice cream and sorbets

AGRIFOOD

DISTRIBUTION OF JOBS / ESTABLISHMENTS BY INVESTMENT ORIGIN



WHOLESALE TRADE

494 ESTABLISHMENTS 12,487 EMPLOYEES

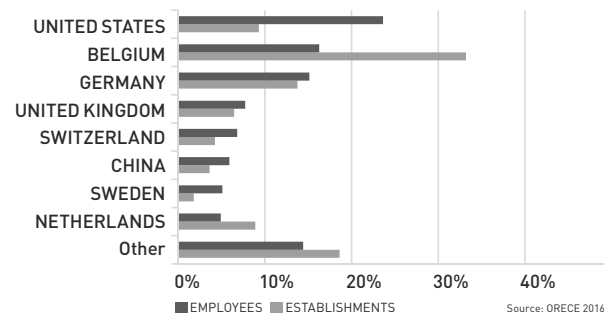
This sector has a strong presence of small establishments (88% have fewer than 50 employees) and Belgian-owned establishments (more than 30% of the establishments). However, the US and UK dominate the sector in terms of employees, with the US sites Office Depot in Senlis and Antargaz in Thiant and the UK site RS Components in Beauvais.

TOP 5

- 1. OFFICE DEPOT BS**, 850 employees, Senlis, Wholesale trade (business-to-business) of other domestic goods
- 2. RS ET RADIOSPARES - RS COMPONENTS SAS**, 514 employees, Beauvais, Wholesale trade (business-to-business) of electronic and telecommunication equipment and components
- 3. ANTARGAZ**, 350 employees, Thiant, Wholesale trade (business-to-business) of fuels and related products
- 4. ARJOHUNTLEIGH**, 310 employees, Roncq, Wholesale trade (business-to-business) of pharmaceuticals
- 5. INGRAM MICRO Lesquin**, 302 employees, Lesquin, Wholesale trade (business-to-business) of computers, peripheral computer equipment, and software

WHOLESALE TRADE

DISTRIBUTION OF JOBS / ESTABLISHMENTS BY INVESTMENT ORIGIN



AUTOMOTIVE

37 ESTABLISHMENTS 9,060 EMPLOYEES

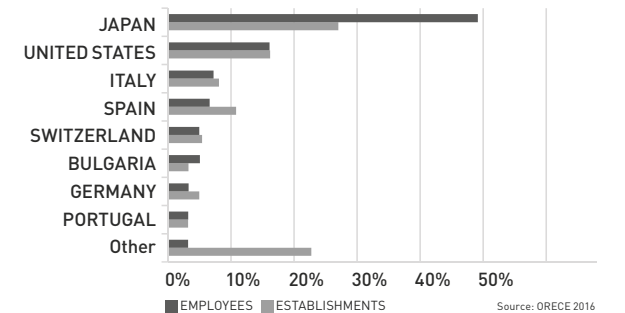
Japan dominates the automotive sector with the Toyota factory in Onnaing (3,094 employees) and MBK in Rouvroy (690 employees). The United States and Germany rank 2nd and 3rd regionally, respectively, in terms of the number of employees.

TOP 5

- 1. TOYOTA MOTOR MANUFACTURING FRANCE**, 3 094 employees, Onnaing, Automotive manufacturing
- 2. GROUPEMENT INTERNATIONAL MECANIQUE AGR**, 927 employees, Beauvais, Manufacturing of other automotive equipment
- 3. MBK INDUSTRIE**, 690 employees, Rouvroy, Motorcycle manufacturing
- 4. TIM SA**, 446 employees, Quaedyre, Manufacturing of automotive bodies and trailers
- 5. AUTONEUM France**, 351 employees, On-S-En-Bray, Manufacturing of other automotive equipment

AUTOMOTIVE

DISTRIBUTION OF JOBS / ESTABLISHMENTS BY INVESTMENT ORIGIN



TRANSPORT/LOGISTICS

131 ESTABLISHMENTS 7,765 EMPLOYEES

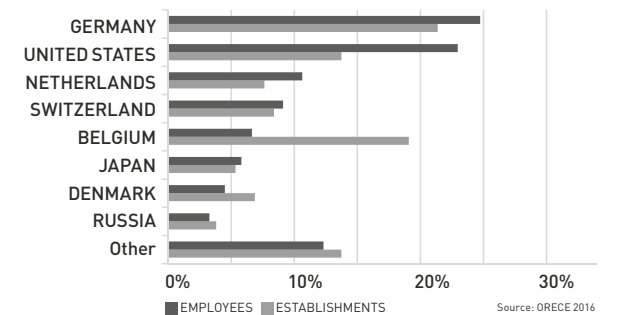
Currently, Germany ranks highest in this sector in terms of both establishments and the number of employees, particularly due to Dispéo, located in Hem (450 employees). However, the United States is expected to become the sector's largest employer very soon with the Amazon's increased presence in the region (Douai and Amiens), whose workforce is expected to rapidly rise to 1,500 employees before long.

TOP 5

- 1. AMAZON**, 603 employees, Lauwin Planque, Unrefrigerated storage and warehousing
- 2. CNH France**, 499 employees, Le Plessis Belleville, Unrefrigerated storage and warehousing
- 3. DISPEO**, 450 employees, Hem, Transport chartering and organisation
- 4. P&O FERRIES LIMITED**, 273 employees, Calais, Maritime and coastal passenger transport
- 5. XPO VOLUME Nord France**, 271 employees, Villeneuve-Saint-Germain, Inter-city freight road transport

TRANSPORT/LOGISTICS

DISTRIBUTION OF JOBS / ESTABLISHMENTS BY INVESTMENT ORIGIN



MANUFACTURING OF MECHANICAL ENGINES AND MACHINERY

70 ESTABLISHMENTS 5,681 EMPLOYEES

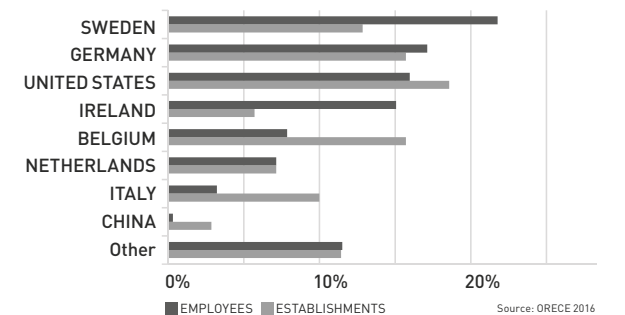
The United States and Belgium have the most establishments, but Switzerland has the most employees. This top position is due to a collection of large sites, including SKF in Rouvignies, which specialises in aeronautics and aerospace.

TOP 5

- 1. SKF AEROENGINE France**, 574 employees, Rouvignies, Manufacturing of gears and mechanical transmission components
- 2. SCHAEFFLER CHAIN DRIVE SYSTEMS**, 403 employees, Calais, Manufacturing of gears and mechanical transmission components
- 3. GALE DE ROBINETTERIE INDUSTRIELLE**, 382 employees, Armentières, Manufacturing of other plumbing items
- 4. BRICARD**, 297 employees, Feuquières en Vimeu, Manufacturing of locks and fittings
- 5. ASSA ABLÖY Côte Picarde**, 200 employees, Oust-Marest, Manufacturing of locks and fittings

MANUFACTURING OF MECHANICAL ENGINES AND MACHINERY

DISTRIBUTION OF JOBS / ESTABLISHMENTS BY INVESTMENT ORIGIN



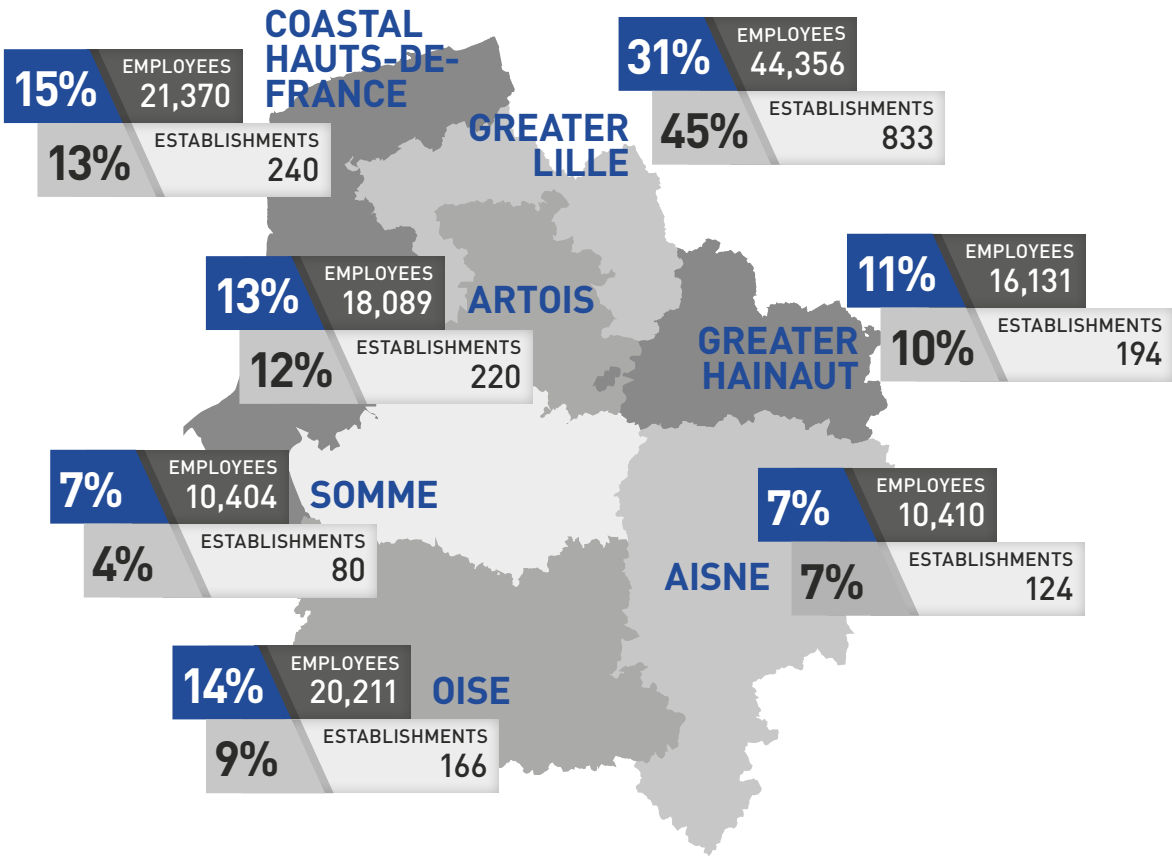
U3. LOCAL APPEAL

The geographical distribution of foreign establishments in the region provides an indication of the attractiveness of the territories.

In terms of the number of employees, Greater Lille dominates with 31% of the jobs for foreign-owned companies. It is followed by the territories of Coastal Hauts-de-France, Oise, Artois, and Greater Hainaut, each of which account for about 14% of the jobs. Aisne and Somme are slightly behind.

In terms of establishments, Greater Lille dominates even more, with 45% of the sites. Next comes Coastal Hauts-de-France, which ranks higher than Artois, Greater Hainaut, and Oise. As for the number of employees, Aisne and Somme rank at the bottom.

ANALYSIS BY AREA



GREATER LILLE

833 ESTABLISHMENTS 44,356 EMPLOYEES

Benefiting from its location near the border and its metropolitan status, Greater Lille is the territory that welcomes the most foreign investments: 45% of establishments and 31% of employees. The sectors include business services, which dominate with 19.5% of the establishments and 19% of the employees. In terms of nationalities, Belgium has the most establishments, but the United States has the most employees, despite a limited number of establishments.

NATIONALITY	EMPLOYEES EST.	ACTIVITIES	EMPLOYEES EST.
UNITED STATES	13,695	BUSINESS SERVICES	8,529
GERMANY	7,483	GLASS, CERAMICS, MINERALS, WOOD, AND PAPER INDUSTRY	7,244
BELGIUM	6,377	WHOLESALE TRADE	5,899
SWITZERLAND	2,576	RETAIL	4,077
UNITED KINGDOM	1,999	AGRIFOOD, AGRICULTURE, AND FISHING	3,947
SWEDEN	1,835	TRANSPORT/LOGISTICS	3,274
NETHERLANDS	1,656	CHEMICALS/PLASTICS	2,814
OTHER	8,735	OTHER	8,572
TOTAL	44,356	TOTAL	44,356

Source: ORECE 2016

Source: ORECE 2016

COASTAL HAUTS-DE-FRANCE

240 ESTABLISHMENTS 21,370 EMPLOYEES

Hosting 15% of the regional workforce and 13% of the establishments, Coastal Hauts-de-France is heavily involved in manufacturing, which accounts for 80% of the workforce and 50% of the establishments. Due to its geographic proximity, Belgium has the most establishments, but Luxembourg has the most employees, with the Arcelor Mittal factory in Grande-Synthe, making this territory number one in metallurgy.

NATIONALITY	EMPLOYEES EST.	ACTIVITIES	EMPLOYEES EST.
LUXEMBOURG	4,290	METALLURGY	6,198
GERMANY	3,368	AGRIFOOD, AGRICULTURE, AND FISHING	2,636
BELGIUM	2,925	CHEMICALS/PLASTICS	2,159
UNITED STATES	2,839	OTHER MANUFACTURING	2,152
UNITED KINGDOM	1,355	GLASS, CERAMICS, MINERALS, WOOD, AND PAPER INDUSTRY	2,092
NETHERLANDS	882	MANUFACTURING OF MECHANICAL EQUIPMENT AND MACHINERY	1,618
ITALY	759	BUSINESS SERVICES	1,136
OTHER	4,952	OTHER	3,379
TOTAL	21,370	TOTAL	21,370

Source: ORECE 2016

Source: ORECE 2016

OISE

166 ESTABLISHMENTS 20,211 EMPLOYEES

With 9% of the region's establishments, but 14% of the workforce, foreign-invested enterprises in Oise consist of large sites. The United States has the most sites and employees, particularly in the manufacturing sector, which represents 73% of the employees and 68% of the establishments. The territory of Oise is a leader in chemicals and plastics, with Colgate operations in Compiègne and a Weylchem site in Trosly-Breuil.

NATIONALITY	EMPLOYEES EST.	ACTIVITIES	EMPLOYEES EST.
UNITED STATES	9,727 45	CHEMICALS/PLASTICS	4,390 36
NETHERLANDS	1,879 10	WHOLESALE TRADE	2,684 30
GERMANY	1,747 23	OTHER MANUFACTURING	2,100 12
SWITZERLAND	1,287 7	METALLURGY	2,095 18
UNITED KINGDOM	1,079 6	AUTOMOTIVE INDUSTRY	2,010 8
SWEDEN	664 8	GLASS, CERAMICS, MINERALS, WOOD, AND PAPER INDUSTRY	1,813 8
ITALY	639 11	BUSINESS SERVICES	1,072 7
OTHER	3,189 56	OTHER	4,047 47
TOTAL	20,211 166	TOTAL	20,211 166

Source: ORECE 2016

Source: ORECE 2016

ARTOIS

220 ESTABLISHMENTS 18,089 EMPLOYEES

Artois accounts for 13% of the workforce and 12% of the establishments, or nearly the same as Coastal Hauts-de-France. Germany has the most employees, particularly due to the presence of call centres for Arvato Group (2,500 employees). However, manufacturing accounts for the majority of foreign investments, with 60% of employees and 45% of establishments. This territory also stands out due to its diversity of industries (plastics, agrifood, metallurgy, etc.).

NATIONALITY	EMPLOYEES EST.	ACTIVITIES	EMPLOYEES EST.
GERMANY	4,743 40	BUSINESS SERVICES	4,106 28
UNITED STATES	2,778 28	CHEMICALS AND PLASTICS	3,439 24
JAPAN	1,584 8	AGRIFOOD, AGRICULTURE, AND FISHING	2,590 18
BELGIUM	1,471 42	METALLURGY	1,557 13
LUXEMBOURG	1,154 14	OTHER MANUFACTURING	1,325 4
ITALY	903 9	WHOLESALE TRADE	1,298 49
SWITZERLAND	843 10	TRANSPORT/LOGISTICS	848 18
OTHER	4,613 69	OTHER	2,926 66
TOTAL	18,089 220	TOTAL	18,089 220

Source: ORECE 2016

Source: ORECE 2016

GREATER HAINAUT

194 ESTABLISHMENTS 16,131 EMPLOYEES

Greater Hainaut accounts for 11% of the workforce and 10% of establishments with foreign investors. Belgium dominates in terms of the number of establishments, but Japan employs the most people, thanks to the Toyota factory in Onnaing, making this territory a leader in the automotive sector. Manufacturing plays a major role, representing 80% of the workforce and 50% of the establishments.

NATIONALITY	EMPLOYEES EST.	ACTIVITIES	EMPLOYEES EST.
JAPAN	3,837 18	AUTOMOTIVE INDUSTRY	3,909 12
UNITED STATES	2,145 29	OTHER MANUFACTURING	2,526 11
BELGIUM	1,633 53	METALLURGY	2,458 20
GERMANY	1,204 21	GLASS, CERAMICS, MINERALS, WOOD, AND PAPER INDUSTRY	1,483 15
CANADA	1,185 1	WHOLESALE TRADE	1,229 44
ITALY	1,100 11	MANUFACTURING OF MECHANICAL EQUIPMENT AND MACHINERY	875 7
UNITED KINGDOM	1,006 8	TRANSPORT/LOGISTICS	857 14
OTHER	4,021 53	OTHER	2,794 71
TOTAL	16,131 194	TOTAL	16,131 194

Source: ORECE 2016

Source: ORECE 2016

AISNE

124 ESTABLISHMENTS 10,410 EMPLOYEES

Aisne accounts for 7% of the workforce and establishments for foreign-owned companies in the region. Manufacturing comes out on top, with 86% of the employees and 80% of the establishments, the highest of the seven territories that make up the region. The profile of manufacturing activities is rather diverse: agrifood ranks highest, just ahead of metallurgy, chemicals/plastics, and automotive.

NATIONALITY	EMPLOYEES EST.	ACTIVITIES	EMPLOYEES EST.
UNITED STATES	2,765 20	AGRIFOOD, AGRICULTURE, AND FISHING	1,878 18
GERMANY	2,641 26	METALLURGY	1,424 17
SWITZERLAND	1,208 12	CHEMICALS/PLASTICS	1,346 10
ITALY	1,001 19	AUTOMOTIVE INDUSTRY	1,289 4
JAPAN	792 2	OTHER MANUFACTURING	1,079 12
BELGIUM	447 15	GLASS, CERAMICS, MINERALS, WOOD, AND PAPER INDUSTRY	952 12
SPAIN	381 4	RETAIL	699 1
OTHER	1,175 26	OTHER	1,743 50
TOTAL	10,410 124	TOTAL	10,410 124

Source: ORECE 2016

Source: ORECE 2016

SOMME

80 ESTABLISHMENTS 10,404 EMPLOYEES

With 7% of the workforce and only 4% of the establishments, the territory of CCI Amiens-Picardie possesses large sites. The United States ranks highest in the number of establishments and the number of employees. Like the rest of Picardy, manufacturing is significant, accounting for 88% of employees and 75% of establishments. As in Oise, chemicals and plastics are the top employer sectors for foreign-invested enterprises.

NATIONALITY	EMPLOYEES EST.	ACTIVITIES	EMPLOYEES EST.
UNITED STATES	3,483 15	CHEMICALS/PLASTICS	3,971 18
NETHERLANDS	1,948 4	OTHER MANUFACTURING	2,526 6
GERMANY	1,287 14	AGRIFOOD, AGRICULTURE AND FISHING	1,637 11
UNITED KINGDOM	682 7	TRANSPORT/LOGISTICS	485 6
JAPAN	672 3	METALLURGY	397 5
SWITZERLAND	610 3	GLASS, CERAMICS, MINERALS, WOOD, AND PAPER INDUSTRY	388 3
BELGIUM	428 9	PERSONAL SERVICES	250 2
OTHER	1,294 25	OTHER	750 29
TOTAL	10,404 80	TOTAL	10,404 80

Source: ORECE 2016

Source: ORECE 2016

4. COMPANY SIZE

The 622 sites with 50 or more employees (or 33.5% of the total number of sites) employ nearly 90% of the employees working for foreign companies in the region. As added proof that jobs are concentrated in a limited number of establishments, sites with 100 or more employees represent only 20% of the total establishments, but employ more than 76% of the workforce.

HEADCOUNT RANGE	TOTAL HEADCOUNT	CUMULATIVE	% CUMULATIVE	NUMBER OF EST.	CUMULATIVE	% CUMULATIVE
1,000 and +	21,122	21,122	15.0%	10	10	0.5%
500 to 999	18,351	39,473	28.0%	28	38	2.1%
200 to 499	38,537	78,010	55.3%	131	169	9.1%
100 to 199	28,523	106,533	75.6%	200	369	19.9%
50 to 99	18,287	124,820	88.6%	253	622	33.5%
10 to 49	14,232	139,052	98.6%	553	1,175	63.3%
0 to 9	1,919	140,971	100.0%	682	1,857	10.0%
TOTAL	140,971			1,857		

Source: ORECE 2016

According to the analysis of the average number of employees per site, there are 76 people per establishment. Manufacturing thus has larger sites than the tertiary sector has. It has the eight top rankings (with the highest ranked automotive industry and its average of 250 employees per site), while the service sector ranks at the bottom.

BUSINESS SECTORS

BUSINESS SECTORS	AVERAGE NUMBER OF EMPLOYEES PER ESTABLISHMENT
AUTOMOTIVE INDUSTRY	250
OTHER MANUFACTURING	173
GLASS, CERAMICS, MINERALS, WOOD, AND PAPER INDUSTRY	170
METALLURGY	146
AGRI FOOD, AGRICULTURE, AND FISHING	139
CHEMICALS/PLASTICS	132
MANUFACTURING OF MECHANICAL EQUIPMENT AND MACHINERY	81
TEXTILE INDUSTRY	76
BUSINESS SERVICES	64
RETAIL	61
TRANSPORT	59
CONSTRUCTION	31
PERSONAL SERVICES	29
WHOLESALE TRADE	25
MANUFACTURING OF MATERIALS FOR CONSTRUCTION	17
ENERGY, RECYCLING, AND OTHER LICENSED SERVICES	14
ALL BUSINESS SECTORS	76

Source: ORECE 2016

TOP 50 FOREIGN-OWNED ESTABLISHMENTS

COMPANY NAME	NATIONALITY	EMP.	LOCATION	ACTIVITY
ARC FRANCE		5,052	Arques	Hollow glass manufacturing
TOYOTA MOTOR MANUFACTURING FRANCE		3,094	Onnaing	Automotive manufacturing
ARCELOR MITTAL DUNKERQUE		3,031	Grande Synthe	Steelmaking
ASF ARVATO SERVICES FRANCE		2,428	Vendin Le Vieil	Call centre activities
STELIA AEROSPACE		1,437	Méaulte	Space and aeronautics manufacturing
AGCO SAS		1,333	Beauvais	Forestry and agricultural machinery manufacturing
BRIDGESTONE FRANCE		1,297	Béthune	Tyre manufacturing and retreading
SAVERGLASS		1,250	Feuquières	Hollow glass manufacturing
BOMBARDIER TRANSPORT FRANCE		1,185	Crespin	Construction of locomotives and other railway rolling stock
PROCTER & GAMBLE AMIENS		1,015	Amiens	Manufacturing of soaps, detergents, and cleaning products
HERTA		990	Saint Pol Sur Ternoise	Industrial preparation of meat products
GROUPEMENT INTERNATIONAL MÉCANIQUE AGR		927	Beauvais	Manufacturing of other automotive equipment
DUNLOP		926	Amiens	Tyre manufacturing and retreading
OFFICE DÉPÔT BS		850	Senlis	Wholesale trade (business to business) of other domestic goods
VERESCENCE		827	Mers Les Bains	Hollow glass manufacturing
CASTORAMA FRANCE		796	Templemars	Retail trade of hardware, paints, and glass in superstores (400 m² and larger)
VOLKSWAGEN FRANCE		699	Villers-Cotterets	Car and light automotive vehicle sales
MBK INDUSTRIE		690	Rouvroy	Motorcycle manufacturing
SBE ONLINE		683	Saint Léonard	Manufacturing of assembled electronic boards
BAYER HEALTHCARE SAS		650	Loos	Manufacturing of pharmaceutical preparations
GLAXOSMITHKLINE BIOLOGICALS		648	Saint Amand Les Eaux	Manufacturing of pharmaceutical preparations
ALUMINIUM DUNKERQUE		646	Loon Plage	Aluminium metallurgy
ENERSYS		639	Arras	Manufacturing of batteries and power storage devices
EJ PICARDIE		616	Saint-Crepin-Ibouillers	Manufacturing of other metal items
AMAZON		603	Lauwin Planque	Unrefrigerated storage and warehousing
WEBHELP COMPIÈGNE		600	Lacroix-Saint-Ouen	Call centre activities
COLGATE-PALMOLIVE INDUSTRIEL		594	Compiègne	Manufacturing of perfumes and toiletries
MC CAIN ALIMENTAIRE		589	Harnes	Potato processing and conservation
SKF AEROENGINE FRANCE		574	Rouvignies	Manufacturing of gears and mechanical transmission components
ARCELOR MITTAL MARDYCK		569	Grande Synthe	Steelmaking
CAPDUNE		556	Coudekerque Branche	Business board and other management boards
ISS PROPRIÉTÉ SAINS EN GOHELLE		546	Sains En Gohelle	Standard cleaning of buildings
DILLINGER FRANCE		541	Grande Synthe	Steelmaking
THYSSENKRUPP ELECTRICAL STEEL UGO		534	Isbergues	Steelmaking
DUACOM EURL		520	Douai	Call centre activities
BASF AGRI PRODUCTION		518	Gravelines	Manufacturing of pesticides and other agrochemical products
RS ET RADIOSPARES - RS COMPONENTS SAS		514	Beauvais	Wholesale trade (business to business) of electronic and telecommunication equipment and components
CAMAIEU INTERNATIONAL		506	Roubaix	Retail trade of specialised store clothing
CNH FRANCE		499	Le Plessis Belleville	Unrefrigerated storage and warehousing
WEST PHARMACEUTICAL SERVICES FRANCE		495	Le Nouvion-en-Thiérache	Manufacturing of other rubber items
HAAGEN DAZS ARRAS		492	Tilloy Les Mofflaines	Manufacturing of ice cream and sorbets
WEYLICHEM		486	Trosly-Breuil	Manufacturing of other basic organic chemicals
TATA STEEL MAUBEUGE		468	Louvroil	Steelmaking
EGENCIA		465	Tourcoing	Other reservation services and related activities
MOY PARK FRANCE HÉNIN BEAUMONT		461	Hénin Beaumont	Manufacturing of prepared meals
NESTLÉ GRAND FROID - NGF		456	Beauvais	Manufacturing of ice cream and sorbets
DISPEO		450	Hem	Logistics, order preparation
MONTUPET		450	Laigneville	Metal smelting
VERSALIS		446	Dunkerque	Plastics manufacturing
TIM SA		446	Quaedypre	Manufacturing of automotive bodies and trailers

Source: ORECE 2016



This survey was produced jointly by Nord France Invest and the Research Department of the CCI for Hauts-de-France.

PLUS D'INFORMATIONS

Jonathan MARIE Business Intelligence Manager - Nord France Invest
+33 3 59 56 23 31 j.marie@nfinvest.fr

Annabelle GRAVE Business Intelligence Analyst - Resarch Department - CCI for Hauts-de-France
+33 3 20 63 79 75 a.grave@hautsdefrance.cci.fr