



LES CCI
D'Auvergne-Rhône-Alpes

2021 Edition

Key figures for Auvergne- Rhône-Alpes



POPULATION



TERRITORY



ACCESSIBILITY



ECONOMY



EMPLOYMENT



TRAINING



INNOVATION



INTERNATIONAL



MANUFACTURING



TRADE



SERVICES



TOURISM



CONSTRUCTION
PUBLIC WORKS



COMMERCIAL LAND
AND REAL ESTATE



CRAFT



AGRICULTURE



EDITORIALS



These key figures give an accurate picture of the Auvergne-Rhône-Alpes region: they reflect the strength of its economy, the dynamism of its players and the diversity of their know-how.

For many businesses, 2020 was a difficult year. The State has put exceptional support measures in place to help them get through the health crisis and preserve our economic fabric. The region's CCI efforts in listening to, supporting and advising businesses should be applauded. Also noteworthy is the singular ability of the region's economic players to adapt in order to move forward.

2021 will be a year of recovery, renewed confidence and new perspectives for investors and business people. With its 100 billion euros, the recovery plan is already helping businesses to invest in their competitiveness and the ecological transition while reinforcing social cohesion. The State knows it can count on the region's CCI to steer, guide and support businesses in getting the best possible benefit from the recovery plan, and together contribute to our region's success!

Pascal MAILHOS

Prefect of the Auvergne-Rhône-Alpes region



As every year, the region's CCI, together with the territorial CCI network, is pleased to present the "Key Figures for Auvergne-Rhône-Alpes". By this publication, we provide our region's decision-makers with the latest statistical indicators on the economic, demographic and social situation. Moreover, the health crisis we have had to grapple with for close to a year now, has prompted us to include some information about initial trends in 2020.

Our region, with its strong tourism and export orientation, is clearly affected by this major crisis. That is why the 500 elected officials and the 1,500 CCI employees have, from the outset, stood alongside all our business leaders to support them, listen to them and help them. And, of course, we are working in full collaboration with the State, the Region and the professional organisations, MEDEF and CPME.

Given its economic power and diversity, its entrepreneurial spirit anchored in its culture, and its research and innovation capacity, I have no doubt that Auvergne-Rhône-Alpes, by mustering all its talents, will be able to get through this testing time and will maintain its position as one of the European Union's most prosperous regions.

Philippe GUERAND

President of the Auvergne-Rhône-Alpes CCI

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KEY FIGURES

- **France's top industrial region:** with over 505,000 jobs (salaried and non-salaried) over 54,400 sites, Auvergne-Rhône-Alpes is the French region with the highest number of jobs in industry. This generates **18.3% added value** in Auvergne-Rhône-Alpes compared with 14.3% in mainland France.
- **France's 2nd richest region:** with a **GDP of 270 billion euros**, Auvergne-Rhône-Alpes is **5th placed region in the European Union¹** and is in **2nd place in France** (11.5% of the national total). The economic power of Auvergne-Rhône-Alpes is greater than that of Finland, which is ranked 13th among EU member countries. The region is also in **2nd place nationally in terms of GDP / capita (33,600 euros)**.
- **The 2nd most innovative region in France:** with **7 billion euros of expenditure on R&D**, i.e. 2.7% of the regional GDP, Auvergne-Rhône-Alpes accounts for **14% of the national effort**. **15% of French research workers** in the private sector are employed by R&D centres in Auvergne-Rhône-Alpes. Its four regional Metropolises (Lyon, Grenoble, Clermont-Ferrand and Saint-Etienne) occupy the top four places in France in terms of invention intensity. **66% of French semi-conductor patents are invented in the region**.
- **2nd region in France for further education:** Auvergne-Rhône-Alpes has **347,676 students**. It trains **24,569 engineers, i.e. 15% of all engineering students in France**, and 15% of students at technology university institutes (IUT) and business school students. 44.2% of the active population in the region have further-education diplomas compared with a national average of 42.8%².
- **The 2nd most populous region in France:** Auvergne-Rhône-Alpes has a **population of over 8 million**, i.e. almost as much as Austria or Switzerland. The urban area of Lyon is the most populous French city after Paris, with a population of 2.3 million. The regional population is growing four times faster than the national average.
- **2nd French region for employment in the private sector:** Auvergne-Rhône-Alpes has **2.3 million salaried jobs in the sector**, i.e. 60% above the third-placed region.
- **France's 2nd region for the number of businesses exporting goods (16,220).**
- **France's 2nd region for tourism revenue:** tourism generates **21.2 billion euros of revenue** in Auvergne-Rhône-Alpes, i.e. 14% of the national total. It represents 80% of the French mountain economy. Lyon is in second place nationally as a venue for the international association conferences in 2019.
- **3rd air entry point to France:** Lyon-Saint Exupéry airport welcomed **11.7 million passengers in 2019** with 132 air routes, including 76 European and 27 intercontinental. It was recognised as the best European airport in its category in 2019.

¹Based on Eurostat NUTS 2. If the Eurostat nomenclature is recomposed to take into account the German Länder, the region ranks 13th.

²Proportion of working population between 25 and 54 years old, population census.



TRENDS 2020

2020 was marked worldwide by the Covid-19 pandemic. Europe was hit hard. Economic activity was strongly affected by the health measures taken to slow the spread of the virus, with in particular in France an initial lockdown of the population in spring, a second in November and a curfew since the end of the year. In this context, **France's GDP could see a 9% drop in 2020.**

The **turnover of our regional businesses fell by 10.7%** for the period from January to the end of September compared with the same period the previous year.

Over these same months, **goods exports from the region recorded a 13.1% drop** and the international formalities provided by the CCI's for exporting outside the EU saw a 19.3% decline. As for **imports, they were down by 12.4%.**

The number of **passengers through the region's 10 airports** from January to the end of September **was 65% below** the figure for the same period in 2019.

Summer visitor numbers were up for 22% of professionals, stable for 27% and down for 51%. The 2019/2020 winter sports season, interrupted prematurely in March 2020, was 16% down from the previous season in terms of skier-days.

From January to the end of September 2020, the **number of housing starts fell by 3.1%** compared to the same period in 2019. The figure for **business premises saw a 19.8% drop.**

As at the end of September 2020, **the employment level in the private sector showed a downturn of 1.2%** compared to the end of 2019. **The number of job seekers, for its part, rose by 11.7%.**

Despite these indicators showing a decline generally, for the first 9 months of 2020, the region's entrepreneurial dynamic was unaffected: **almost the same number of businesses were created as in 2019 (-0.3%).**

Auvergne-Rhône-Alpes is one of Europe's very top regions, in terms of territory, population and also the wealth created there. A remarkable quality of life, great accessibility, a young, active and growing population in the European context, a very good educational level, together with great research and innovation potential make it a particularly attractive region.

At the heart of the economic fabric, the Chambers of Trade and Industry represent close to 400,000 establishments in industry, trade and services, which employ 84% of employees in the commercial sector excluding agriculture.



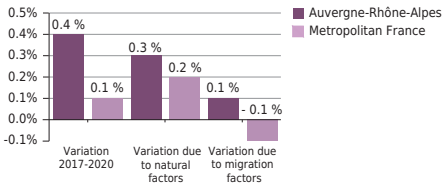
POPULATION

→ Demography

Inhabitants	Auvergne-Rhône-Alpes	Auvergne-Rhône-Alpes / Metropolitan France (%)
2020	8,032,377	12.4

Source: Insee, estimates of population, 1/01/2020, provisional results

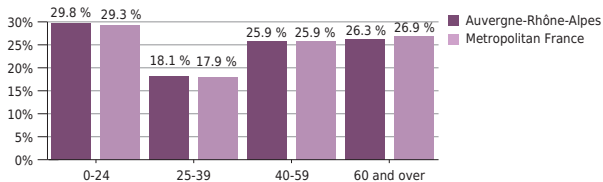
→ Average annual rate of variation of the population



Source: Insee, estimates of population, 1/01/2020, provisional results

Average number of children per woman: **1.87** (1.84 in Metropolitan France).

→ Structure of the population by age group



Source: Insee, estimates of population, 1/01/2020, provisional results

→ Population of the main “urban areas”

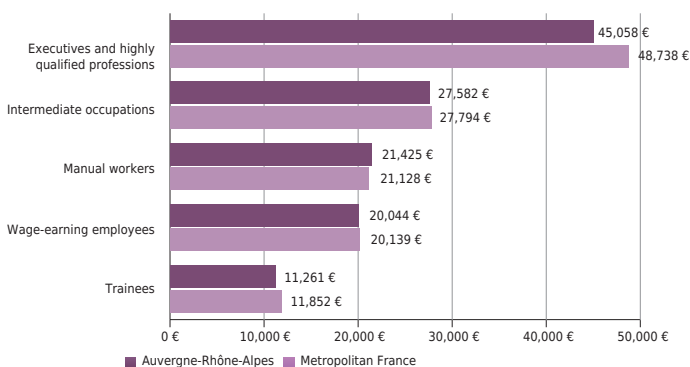
Lyon	2,323,221	Cluses	96,101
Grenoble	689,840	Thonon-les-Bains	93,456
Saint-Etienne	520,640	Vichy	82,554
Clermont-Ferrand	485,315	Montélimar	79,786
Annemasse-Genève*	325,696	Montluçon	76,765
Annecy	238,283	Le Puy-en-Velay	75,710
Chambéry	226,420	Romans-sur-Isère	75,634
Valence	181,814	Aurillac	64,744
Bourg-en-Bresse	127,695	Moulins	62,129
Vienne	114,936	Aubenas	61,503
Roanne	107,414		

Source: Insee, population census, 2017, last available data

“Urban area”: a set of adjoining communes with no enclaves and at least 40% of its population residing and working within the urban area

*French part

→ Average net annual income by socio-professional category



Source: Insee DADS, last available data
By FTE (full-time equivalent)

→ Households

	Auvergne-Rhône-Alpes	France
Number of fiscal households	4,507,901	38,549,926
Average income per household	28,826 €	27,780 €
Percentage of households liable for tax	54.7 %	51.6 %

Source: Direction Générale des Finances Publiques [French General Public Finance Department], 2019 taxes (2018 incomes)



TERRITORY

→ Surface area

Auvergne-Rhône-Alpes: 69,711 km² or 12.8% of France's total surface area.

Source: Insee / IGN

→ Population density

Density (inhabitants per km ²)	Auvergne-Rhône-Alpes	Metropolitan France
	114	119

Source: Insee

→ Number of communes and intercommunal cooperation institutions

In numbers	Auvergne-Rhône-Alpes	Metropolitan France
Communes	4,030	34,838
Métropolis	4	22
Agglomeration communities	28	207
Communes communities	132	989

Source: General Directorate for Local Authorities, 1/01/2020

→ Land use

	Auvergne-Rhône-Alpes	Metropolitan France
Share of artificialised areas	8.8%	9.7%

Source: Agreste, annual agricultural statistics, 2019, provisional
Artificialised areas: areas removed from their natural, wooded or agricultural state

ACCESSIBILITY



At the crossroads of Europe's main transport routes, Auvergne-Rhône-Alpes is serviced by the following first class facilities:

A network of airports used by 12,751,847 commercial passengers in 2019: Lyon-Saint Exupéry (11,736,957 passengers), Clermont-Ferrand Auvergne (432,444), Grenoble Isère (308,018), Chambéry Savoie (203,494), Aurillac (38,413), Le Puy-Loudes (5,399)...

- Heavy TGV traffic with 22.4 million passengers arriving or leaving in 2019.
- A dense network of close to 1,700 km of motorways linked to the Swiss and Italian networks.

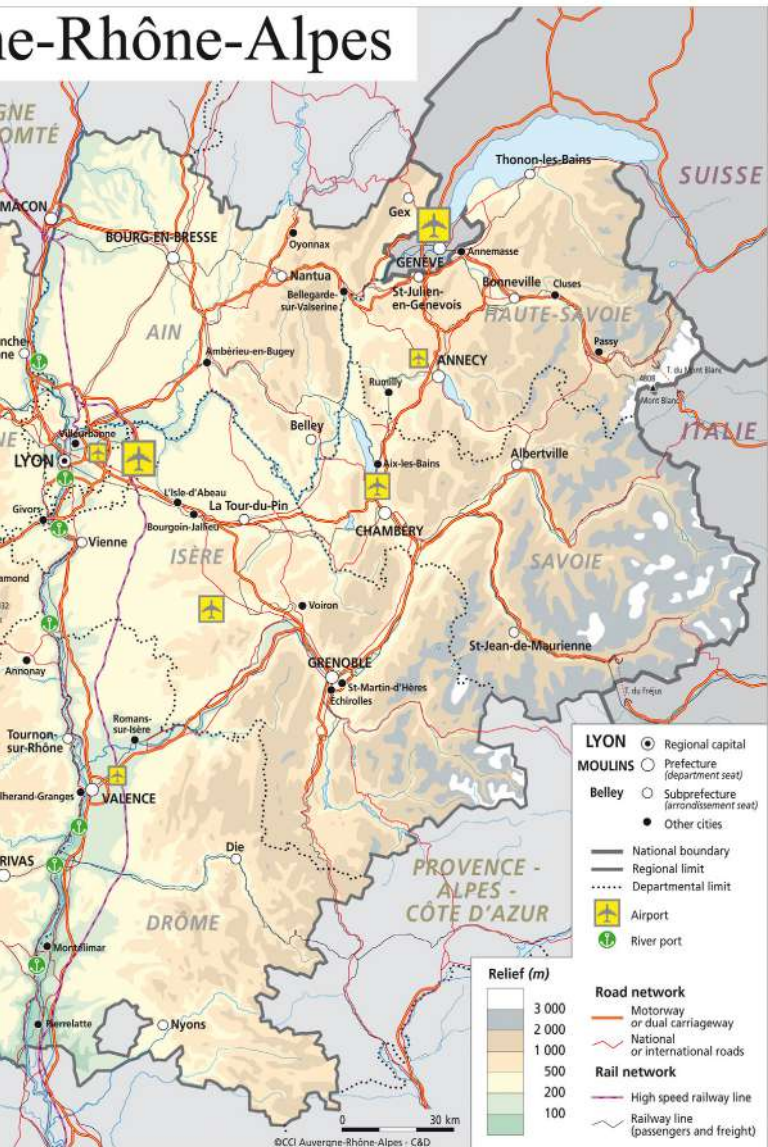
With numerous logistics platforms, Auvergne-Rhône-Alpes is a major hub for the flow of goods:

- Road: 267.6 million tonnes.
- River and river-maritime: 2.6 million tonnes handled by public harbours in Auvergne-Rhône-Alpes in 2019. Total traffic in the Rhône-Saône river basin amounted to 1.4 billion tonnes* km.

Sources: French General Civil Aviation Department, DREAL, SITRAM, SNCF, ports of Auvergne-Rhône-Alpes Chambers of Commerce and Industry and Port Edouard-Herriot of Lyon, VNF



Auvergne-Rhône-Alpes



- LYON** ● Regional capital
- MOULINS** ○ Prefecture (department seat)
- Belley** ○ Subprefecture (arrondissement seat)
- Other cities
- National boundary
- Regional limit
- Departmental limit
- ✈ Airport
- 🚢 River port
- Road network**
- Motorway or dual carriageway
- National or international roads
- Rail network**
- High speed railway line
- Railway line (passengers and freight)



ECONOMY

→ Gross Domestic Product (GDP)

PIB	Auvergne-Rhône-Alpes / France	GDP - Position in France	Per capita GDP	Per capital GDP - Position in France
269,964 M€	11.5%	2nd	33,600 €	2nd

Source: Eurostat, 2018

→ Value Added

M€	Farming	Manufacturing	Construction	Trade	Services	Total
Auvergne-Rhône-Alpes	2,371	41,002	14,397	21,787	144,016	223,573
Spread as %	1.1	18.3	6.4	9.7	64.4	100.0
Metropolitan France	33,634	275,145	104,984	192,280	1,318,009	1,924,051
Spread as %	1.7	14.3	5.5	10.0	68.5	100.0

Source: Insee, regional accounts, provisional data

Value added: production value minus intermediate consumption

→ Number of businesses per activity sector

Manufacturing*	Construction	Trade	Services**	Total
54,361	85,895	126,930	425,107	692,293

Source: Insee, Directory of Companies and Businesses, trading activities except agricultural sector, 31/12/2018, semi-definitive data

*The nomenclature of business activities includes the following trade codes:

APE 10.13B, 10.71B, 10.71C and 10.71D (delicatessen, bakery and confectionary trades).

**Excluding state bodies, local authorities, associations, foundations and professional associations

→ Number of businesses according to number of employees

0 employees*	1 to 9	10 to 49	50 and over	Total
497,026	158,062	30,914	6,291	692,293

Source: Insee, Directory of Companies and Businesses, trading activities except agricultural sector, 31/12/2018, semi-definitive data

*Including non-declared employees

→ Composition of the companies fabric

	Number of companies present Auvergne-Rhône-Alpes	As a %	Auvergne-Rhône-Alpes / France as a %	Salaried workforce (FTE) in Auvergne-Rhône-Alpes	As a %	Auvergne-Rhône-Alpes / France as a %
Micro-businesses	452,470	94.8	12.9	305,390	18.7	12.6
SME (excl. micro)	21,716	4.6	15.6	488,430	29.8	12.9
ETI (Mid-size businesses)	2,582	0.5	45.2	413,820	25.3	12.5
Large businesses	263	0.1	91.6	427,810	26.2	11.0
Total	477,031	100.0	13.1	1,635,450	100.0	12.2

Source: Insee Clap, non-agricultural companies in the commercial sector.

FTE: full-time equivalent

2,582 ETI's (Entreprises de taille intermédiaire -mid-sized businesses) are present in Auvergne-Rhône-Alpes, i.e. close to 50% of those in France, **making it France's top region - outside of Ile-de-France - in terms of ETI numbers.** 460 ETI's have their head office in the region. SME's -the region's top employer - employ a larger percentage of employees in Auvergne-Rhône-Alpes than nationally (30% compared to 28%).

→ Total jobs per activity sector

	Farming	Manufacturing	Construction	Private services	Public services
Auvergne-Rhône-Alpes (%)	2.0	14.8	6.5	46.9	29.7
Metropolitan France (%)	2.3	11.8	6.1	49.3	30.6

Source: Insee, estimations of employment, 31/12/2018, provisional results

→ Overall business creation

	New businesses	New businesses (self-employed status only)
Auvergne-Rhône-Alpes	100,276	48,372
Metropolitan France	796,286	381,690

Source: Insee - 2019, trading activities except agricultural sector

→ Business creations by activity

	Manufacturing*	Construction	Trade	Services	Total
Auvergne-Rhône-Alpes	5,301	10,875	13,553	70,547	100,276

Source: Insee - 2019, trading activities except agricultural sector

*Including codes: APE 10.13B, 10.71B, 10.71C and 10.71D (delicatessen, bakery and confectionary trades)

The figures take into account new businesses under the self-employed tax regime.

→ Changes in businesses registered by the CCI's

	Manufacturing*	Construction	Trade	Services	Total**
Number of registrations	4,486	5,894	14,682	36,192	61,630
Number of deregistrations	2,647	4,186	11,086	20,669	38,844

Source: CCI economic data - 2019

The figures take into account businesses under the self-employed tax regime.

*Including codes: APE 10.13B, 10.71B, 10.71C and 10.71D (delicatessen, bakery and confectionary trades)

**Including agricultural sector and extraterritorial activities

→ Changes in craft industries

	Registrations (absolute value)	Deregistrations (absolute value)
Total Auvergne-Rhône-Alpes	29,998	15,245

Source: Chambers of Trades and Crafts - 2019

The figures take into account businesses under the self-employed tax regime.

→ Businesses by age range of manager

Auvergne-Rhône-Alpes (%)	
Under 30 years	3.7
30 to 54 years	63.4
55 years and over	32.9

Source: CCI economic files as at 31/12/2019

Businesses registered in the Trade and Companies Register



EMPLOYMENT

→ Overall employment

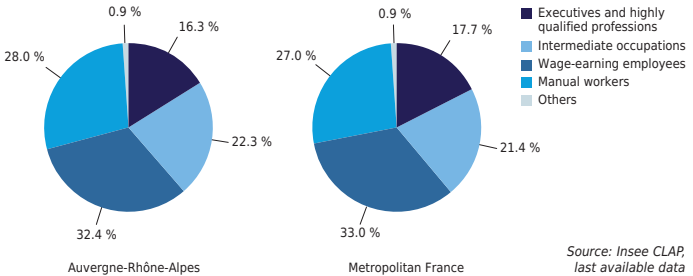
	Overall employment	Non-wage-earning (%)	Auvergne-Rhône-Alpes / Metropolitan France (%)
Total	3,417,444	11.6	12.4

Source: Insee, estimates of employment 31/12/2018, provisional results

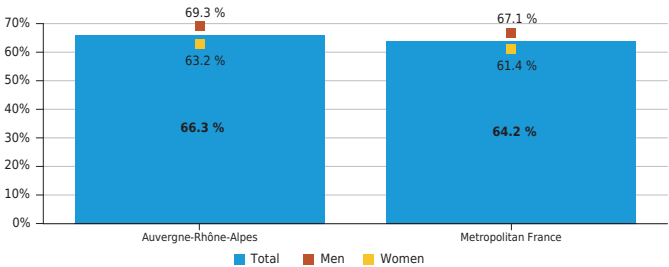
Auvergne-Rhône-Alpes is the second region in France in terms of employment in the commercial sector with 2.3 million employees in businesses (60% higher than the 3rd region).

Source: URSSAF, 31/12/2019

→ Job description



→ Employment rate



→ Unemployment rate

	Auvergne-Rhône-Alpes (%)	France excl. Mayotte (%)
Unemployment rate	6.4	7.1

Source: Insee, 2nd quarter 2020, provisional results
Localised quarterly unemployment rate adjusted for seasonal variations

→ Job seekers

	Auvergne-Rhône-Alpes	Metropolitan France
Number of category A* job seekers	474,880	4,149,300

Source: DIRECCTE / DARES Pôle Emploi, 2nd quarter 2020
*Registered unemployed job seekers actively seeking employment



TRAINING

→ Vocational training and apprenticeship

Auvergne-Rhône-Alpes

Number of training organizations	11,483
Turnover	1,420.6 M€

Source: DIRECCTE Auvergne-Rhône-Alpes, 2018, last available data (declarative data)

Auvergne-Rhône-Alpes

Apprenticeship contracts	37,634
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Source: DIRECCTE-DARES (POEM), 2019-2020 campaign (data at 31/12/2019)

Auvergne-Rhône-Alpes

Number of training sites - CFA	153
Number of training sites - other type of establishments for apprentices	468
Number of apprentices trained per training site	59,076

Source: MENJS-MESRI DEPP / Apprentice information system (SIFA), 2019
CFA : Centre de formation des apprentis

→ Higher education

Auvergne-Rhône-Alpes France

Share of working population aged from 25 to 54 years with higher-education diploma (%)	44.2	42.8
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Source: Insee, population census, last available data

Auvergne-Rhône-Alpes has **8 universities, 50 private schools**, with establishments present in 15 conurbations in the region. Three major communities (the universities of Lyon, Clermont Auvergne and Grenoble-Alpes) are home to these various academic institutions.

Auvergne-Rhône-Alpes is the second region in France in terms of training with **347,676 students**, i.e. 36% above the region in third place. Students numbers thus show strong growth: +2% in 2019-2020, i.e. France's second best growth rate over this period. Auvergne-Rhône-Alpes has **15% of French engineering students (24,569)**. The region also welcomes 15% of France's IUT students and business school students.

Source: Department of Education, 2019-2020



INNOVATION

8 Major Research Infrastructures are located in Auvergne-Rhône-Alpes. The region boasts strengths in many fields of research such as health and biotechnologies, environment, chemistry and technical textiles, digital technology, engineering, nanotechnology, energy and physical science. One of France's four national interdisciplinary Artificial Intelligence Institutes (3IA) is located in Grenoble. 13.6% of researchers in France work in the region's public and private laboratories.

Gross domestic expenditure on R&D stands at €7.0 billion in Auvergne-Rhône-Alpes (2017), i.e. 14% of the national total and 2.6% of the regional GDP (2.2% in France). The region is in second place nationally. 69.4% of Auvergne-Rhône-Alpes' internal expenditure on R&D is accounted for by businesses (i.e. 3.5 points above the national average). Private-sector R&D centres employ 41,200 researchers*, engineers and support staff, i.e. 15% of the national total (2018). The region is behind 19% of protected inventions in France (2,542 patents in 2019). **66% of semi-conductor patent** applications come from the region, and also 27% in the field of chemistry, 25% in electrotechnology, 24% in optics, 22% in furniture/games and 20% in medical technologies and in civil engineering too. The four regional metropolises (Lyon, Grenoble, Clermont-Ferrand and Saint-Etienne) are ranked the top four in France for invention intensity (number of inventors per 1,000 managers in metropolitan functions).

At the heart of a dense business fabric, some thirty competitiveness centres and clusters innovate in the region's areas of excellence: **14 of the 56 competitiveness centres** (*pôles de compétitivité*) with national accreditation have a base in Auvergne-Rhône-Alpes, 8 of them having their head offices there.

*In FTE

Sources: INPI 2019, OST, FNAU, Ministère de l'Enseignement supérieur et de la Recherche



INTERNATIONAL

→ International goods trade

	Auvergne-Rhône-Alpes	Evolution 2019 / 2018 (%)	Auvergne-Rhône-Alpes / France (%)
Exports	62,145 M€	+ 2.8	12.5
Imports	63,996 M€	+ 1.1	11.1

Number of exporter businesses: **16,220 (13.8% of the national total)**.






Source: Directorate-General of Customs and Indirect Taxes (DGDDI) - 2019

→ Principal exports

	Auvergne-Rhône-Alpes	% of total exports	Auvergne-Rhône-Alpes / France (%)
Chemical products, perfume and cosmetics	10,512 M€	16.9	17.7
Industrial and agricultural machinery	7,867 M€	12.7	20.2
IT, electronic and optical equipment	6,650 M€	10.7	20.8
Metallurgical and metal products	5,511 M€	8.9	17.6
Transport equipment	5,448 M€	8.8	4.6






Source: Directorate-General of Customs and Indirect Taxes (DGDDI) - 2019

→ Leading export partners

	Auvergne-Rhône-Alpes	% of total exports	Auvergne-Rhône-Alpes / France (%)
 Germany	9,239 M€	14.9	13.2
 Italy	6,041 M€	9.7	16.1
 Spain	5,009 M€	8.1	13.4
 United Kingdom	4,814 M€	7.7	14.0
 United States of America	4,215 M€	6.8	10.0

Source: Directorate-General of Customs and Indirect Taxes (DGDDI) - 2019

→ Leading import partners

	Auvergne-Rhône-Alpes	% of total imports	Auvergne-Rhône-Alpes / France (%)
 Germany	10,093 M€	15.8	11.9
 Italy	7,585 M€	11.9	17.5
 China	6,503 M€	10.2	12.2
 Spain	3,867 M€	6.0	10.4
 United States of America	3,225 M€	5.0	8.3

Source: Directorate-General of Customs and Indirect Taxes (DGDDI) - 2019

→ Auvergne-Rhône-Alpes business abroad

771 businesses from the Auvergne-Rhône-Alpes region have gained a foothold abroad through the establishment of **2,962** subsidiary companies (representative offices, joint ventures, commercial agencies and shops).

Source: Chambers of Commerce database, October 2019
(Companies with their headquarters in Auvergne-Rhône-Alpes)

→ Foreign investment

	Auvergne-Rhône-Alpes
Number of foreign multinational establishments*	7,313
Jobs expressed at full time equivalent	226,117

Source: Insee Auvergne-Rhône-Alpes, Clap Flores 2017
*Group of businesses where the head of the group is located abroad

Auvergne-Rhône-Alpes is France's 2nd region for jobs with foreign-owned groups, having 226,100 employees in FTE* in 7,300 establishments. Of the countries which are the source of the foreign capital present in the region, 5 countries account for some 2/3 of the corresponding salaried employment: the United States (22% of salaried employment), Germany (15%), Switzerland (12%), Sweden and the United Kingdom (between 7 and 10%).

Source: Insee 2017.
*full time equivalent



MANUFACTURING

→ Number of businesses according to number of employees

0 employees*	1 to 9	10 to 49	50 to 199	200 and over	Total
33,118	13,773	5,745	1,346	379	54,361

Source: Insee, Directory of Companies and Businesses, trading activities except agricultural sector, 31/12/2018, semi-definitive data
*including data unknown

→ Number of private businesses and number of employees per activity sector

	Number of businesses*	Number of employees	Employees in Auvergne-Rhône-Alpes / Metropolitan France (%)
A - Resource extraction	336	2,386	12.1
B - Food, beverage and tobacco manufacturing	5,743	59,517	11.8
C - Textiles, clothing, leather and footwear industries	851	22,348	21.7
D - Woodworking, paper and printing industries	1,536	21,442	13.4
E - Coking and refining industry	5	969	10.7
F - Chemical industry	370	23,172	16.5
G - Pharmaceutical industry	97	16,542	21.1
H - Manufacture of rubber, plastic and other non-metallic mineral products	1,641	52,728	20.8
I - Metallurgy, manufacture of fabricated metal products, except machinery and equipment	3,618	79,160	21.1
J - Manufacture of computer, electronic and optical products	380	23,546	18.6
K - Manufacture of electrical equipment	433	22,295	21.2
L - Manufacture of machinery and equipment n.e.c.	898	36,850	21.2
M - Manufacture of transport equipment	380	26,163	7.4
N - Other manufacturing industries; repair and installation of machinery and equipment	3,629	46,020	17.2
O - Production and distribution of electricity, gas and water; waste management	1,598	43,826	14.2
Total Auvergne-Rhône-Alpes	21,515	476,964	16.0

Source: Acoess - Urssaf, 31/12/2019

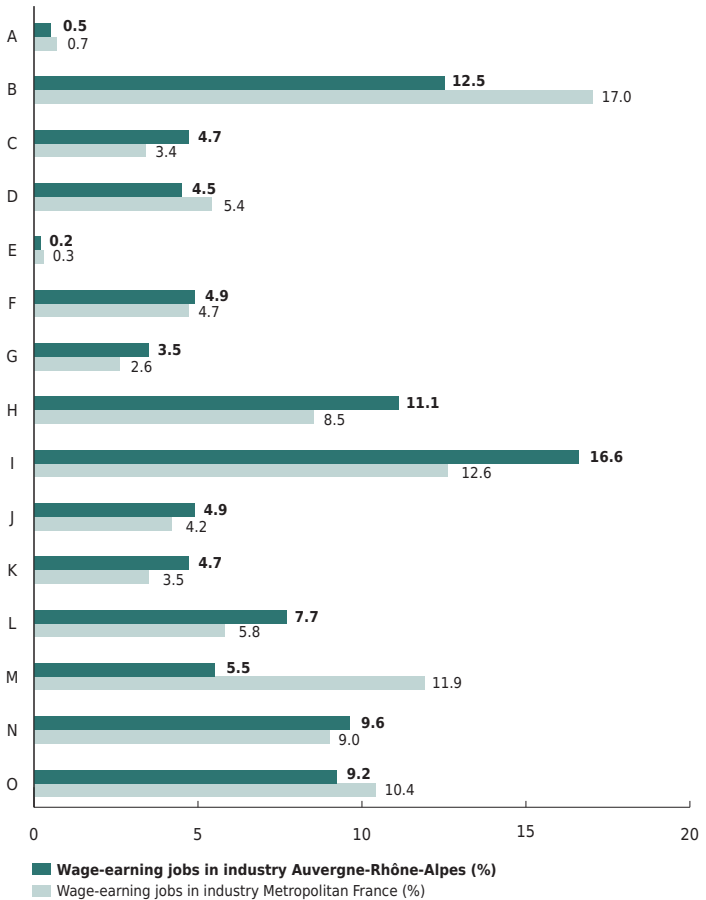
*Only private businesses employing wage earners

These figures do not include temporary jobs in the industry sector or the number of employees in service sector jobs which were formerly classified within the industry sector.

→ Main industrial branches

Auvergne-Rhône-Alpes is France's top region in terms of jobs in industry. It has a diverse business portfolio, very much oriented to export. Regional industry has numerous strengths in cutting-edge activities: machines and other solutions for the 4.0 Industry, digital, electronic components, energy, pharmacy and medical technologies, bar turning, plastics technology, technical textiles, eco-technologies... Industry accounts for 82% of R&D expenditure in Auvergne-Rhône-Alpes.

→ Employees per activity sector





TRADE

→ Main commercial activities

Auvergne-Rhône-Alpes boasts a broad range of businesses. Despite the tendency of business hubs to be centralised, sales outlets are spread over a large area of the regional territory (3,047 municipalities count at least one shop, corresponding to **76% of the municipalities in Auvergne-Rhône-Alpes**), contributing greatly to the quality of life of its inhabitants.

Many leading national retail chains were founded in the region. Business-to-business trade, in which the region's industrial characteristics feature prominently, is also an important sector in Auvergne-Rhône-Alpes.

→ Number of businesses according to number of employees

0 employees*	1 to 9	10 to 49	50 to 199	200 and over	Total
77,668	41,521	6,760	867	114	126,930

Source: Insee, Directory of Companies and Businesses, trading activities except agricultural sector, 31/12/2018, semi-definitive data
*including data unknown

→ Number of private businesses and number of employees

	Number of businesses*	Number of employees	Employees in Auvergne-Rhône-Alpes / Metropolitan France (%)
A - Trade and repair of road vehicles	8,361	51,486	13.6
B - Wholesale trade	11,731	117,188	12.6
C - Retail trade	31,350	210 090	12.1
Total trade in Auvergne-Rhône-Alpes	51,442	378,764	12.4

Source: Acoff - Urssaf, 31/12/2019
*Only private businesses employing wage earners

→ Local retail and services businesses

2019

Food	17,671
Personal goods	11,557
Household goods	8,205
Culture / Leisure	8,445
Hygiene / Health / Beauty	16,576
Cars / Motorcycles	18,324
General items / Secondhand / Miscellaneous	5,463
Cafés / Restaurants	30,267
Services with high-street presence	23,597
Total	140,105

Source: Auvergne-Rhône-Alpes CCI, 2019
CCI France nomenclature

Contrary to the previous indicators, which relate to commerce in the strict sense of the word, this relates to all establishments with a point of sale registered with the Companies and Commercial Register, and so includes cafés, restaurants and services with a storefront providing services in accordance with the French classification of activities (NAF, 2008).

Food: including APE codes 10.13B, 10.71B, 10.71C and 10.71D (butchers, bakers and cake shops) classed under industry in accordance with the French classification of activities (NAF, 2008)

Services with a high-street presence: estate agents, travel agents, temporary employment agencies, driving schools, etc.

→ Stores over 300m²

Number of businesses: **5,957**

- including food retailers: 1,953

- including non-food retailers: 4,004

Source: Chambers of Commerce

Establishments registered in the Trade and Companies Register, excluding Cars / Motorcycles, Cafés / Restaurants and Services with a high-street presence.

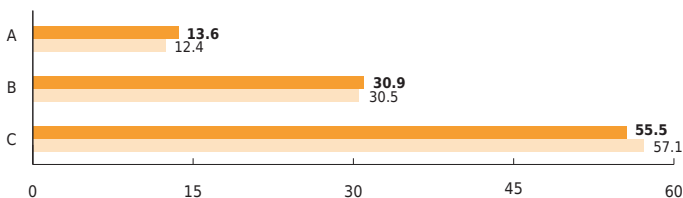
→ Commercial household expenditure

Auvergne-Rhône-Alpes

Tradable expenditure	74,044 M€
Average expenditure per household	21,592 €

Source: CCI France, IDC 2018, household consumer spending (including personal care, car and catering).

→ Employees per activity sector



■ Wage-earning jobs in trade Auvergne-Rhône-Alpes (%)

■ Wage-earning jobs in trade Metropolitan France (%)



SERVICES

→ Number of businesses according to number of employees

0 employees*	1 to 9	10 to 49	50 to 199	200 and over	Total
326,721	80,575	14,661	2,703	447	425,107

Source: Insee, Directory of Companies and Businesses, trading activities except agricultural sector, 31/12/2018, semi-definitive data
*including data unknown

→ Number of private businesses and number of employees per activity sector

	Number of businesses*	Number of employees	Employees in Auvergne-Rhône-Alpes / Metropolitan France (%)
A - Transport and storage	7,635	168,035	12.1
B - Accommodation and catering	23,770	145,490	13.3
C - Information and communication technologies (ICT)	5,433	79,378	9.8
D - Financial and insurance activities	11,532	71,664	9.5
E - Property	5,727	30,060	12.1
F - Specialist business services	21,282	168,596	12.2
G - Administrative support services	16,599	253,815	11.8
H - Administration	367	21,206	11.5
I - Education, health and social services	18,955	267,556	12.5
J - Art, entertainment and leisure activities	8,859	33,670	11.6
K - Other activities and services	14,193	55,945	11.5
Total services Auvergne-Rhône-Alpes	134,352	1,295,415	11.8

C: Publishing, cinema, media, telecommunications, ICT, etc.

F: Legal, accounting, architectural, marketing, consultancy and engineering activities, Research and development...

G: Rental services, temping and recruitment agencies, travel agencies, security, cleaning, call centres, etc.

K: Associations, personal services, etc.

Source: Acoff - Urssaf, 31/12/2019

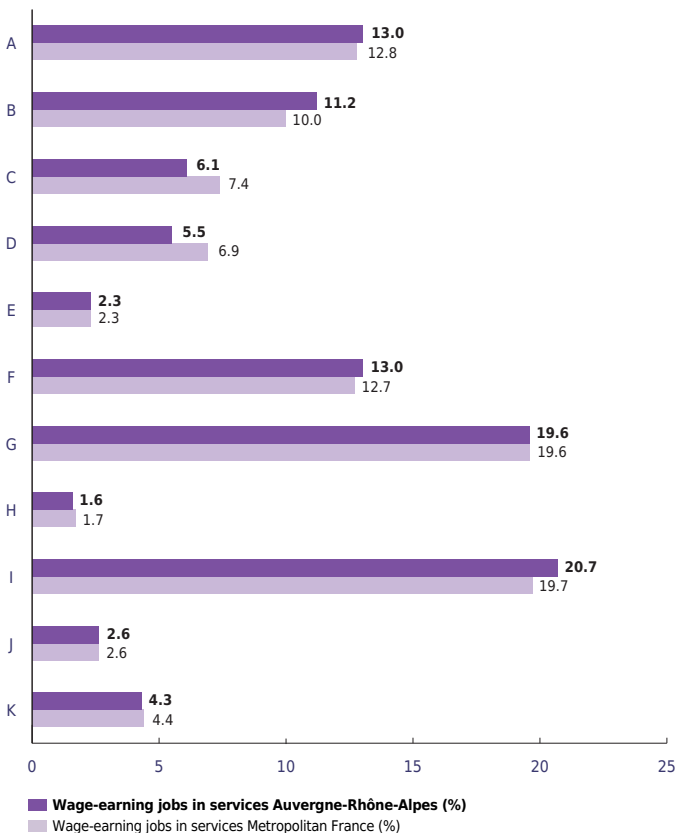
*Only private businesses employing wage earners

→ Main activities in the tertiary sector

Service industries play a predominant role in terms of value added and employment in the region. They thus represent 70% of new business creations. Auvergne-Rhône-Alpes offers in particular a wide range of services to business (digital, engineering, etc.) and financial and insurance establishments, thanks to the density of its economic fabric and dynamic of its R&D eco-system, with an enviable reputation throughout France and around the world.

The region is especially one of the France's main centres for transport / logistics and tourism.

→ Employees per activity sector





TOURISM

With a tourism income of 21.2 billion euros, Auvergne-Rhône-Alpes is France's second tourism region (14% of all of France). In 2019, a total of 160.9 million tourist overnight stays were recorded in the region*.

*overnight stays by French people and by foreigners in commercial accommodation
Source: Auvergne-Rhône-Alpes Tourism

→ Tourist capacity

Number of beds	Auvergne-Rhône-Alpes	Auvergne-Rhône-Alpes / Metropolitan France (%)
Hotels	172,796	13.4
Campsites	283,314	10.5
Youth hostels and sports centres	8,227	22.6
Tourist residences and hotels	168,778	25.4
Holiday villages	61,680	23.2

Sources: Insee, DGE, territorial partners, 2020

Number of second homes (including 10% foreign-owned): **474,894**

Source: Insee, population census

→ Hotels

Graded hotels	1 star	2 stars	3 stars	4 stars	5 stars
Number of hotels	59	722	905	259	76

Source: Insee, 2020

→ Most visited tourist attractions

Name	Number of visitors
Aiguille du Midi cable car (Chamonix, Haute-Savoie)	995,400
Montenvers Railway - Mer de glace (Chamonix, Haute-Savoie)	833,700
Domaine départemental de Vizille (Vizille, Isère)	805,900
Musée des Confluences (Lyon, Rhône)	671,100
Le Pal (Saint-Pourçain-sur-Besbre, Allier)	620,000

Source: Departmental Observatories, OnlyLyon Tourism and Conventions, Regional Tourism Observatory - Year 2019

→ Tourism assets

Auvergne-Rhône-Alpes is in 8th place in Europe in terms of tourist overnight stays.

The region possesses a diverse range of attractions of great interest for tourists:

- mountain tourism with **175 Alpine and Nordic ski stations** and 80% of the French mountain economy (in terms of mechanical lift revenue);
- business tourism (business travel, shows, seminars, etc.), the city of Lyon being in **2nd place nationally** and 41st internationally as a venue for international association conferences;
- 2 National Parks, 10 Natural Regional Parks and 3 of the largest lakes in France;
- 141 cultural sites and 111 recreational sites (with over 10,000 visitors), 145 national museums;
- health tourism with 24 thermal spas;
- river tourism with in particular the Épervière Marina in the Drôme, France's top river port. 24 liners operate in the Rhône Saône basin and dock at Lyon;
- ViaRhôna with 556 km cycleways created along the Rhône;
- urban, gastronomic and wine tourism.

Sources: Auvergne-Rhône-Alpes Tourisme, Eurostat, VNF, ICCA



CONSTRUCTION - PUBLIC WORKS

→ Number of businesses according to number of employees

0 employees*	1 to 9	10 to 49	50 to 199	200 and over	Total
59,519	22,193	3,748	404	31	85,895

Source: Insee, Directory of Companies and Businesses, trading activities except agricultural sector, 31/12/2018, semi-definitive data
*including data unknown

→ Number of private businesses and number of employees

	Number of businesses*	Number of employees	Employees in Auvergne-Rhône-Alpes / Metropolitan France (%)
Total Auvergne-Rhône-Alpes construction	29,381	185,521	12.9

Source: Acof - Urssaf, 31/12/2019
*Only private businesses employing wage earners

→ Characteristics of the construction sector

79% of all employees in the sector work in the building industry and 21% in public works. In 2019, a total of 6 billion euros was spent on civil engineering projects in the Auvergne-Rhône-Alpes region. The total turnover of the building industry amounted to 18 billion euros. Auvergne-Rhône-Alpes has 4.4 million houses and apartments.

Sources: CERC Auvergne-Rhône-Alpes, Insee, 2017 population census

→ Construction of business premises

	Area of premises under construction (m ²)	Auvergne-Rhône-Alpes / Metropolitan France (%)
Hotels	162,561	22.0
Building for crafts	209,411	17.1
Factories	456,044	15.5
Shops	428,105	14.9
Offices, tertiary	572,838	14.7
Public service premises	597,139	13.4
Warehousing	627,602	11.0
Agriculture	706,876	11.3
Total	3,760,576	13.4

Source: Sit@del2 - MEEDDM/CGDD/SOeS - 2019 (to date)

→ Housing construction

	Number of dwellings commenced	Auvergne-Rhône-Alpes / Metropolitan France (%)
Single-family housing (individual)	16,430	14.1
Single-family housing (grouped)	5,690	14.0
Collective housing and residence	33,980	14.2
Total	56,100	14.1

Source: Sit@del2 - MEEDDM/CGDD/SOeS - 2019 (real date estimate)
Due to rounding, the total may slightly differ from the sum of the categories



COMMERCIAL LAND AND REAL ESTATE

→ Business areas

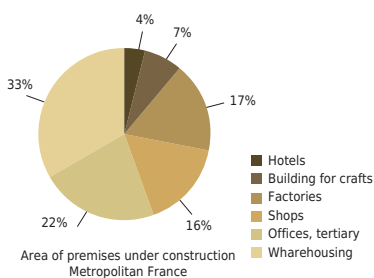
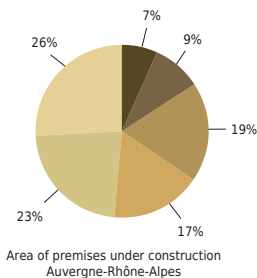
Auvergne-Rhône-Alpes

Number of business areas

1,967

Source: TELEATLAS Multinet, March 2020

→ Construction of business premises



- Hotels
- Building for crafts
- Factories
- Shops
- Offices, tertiary
- Wharehousing

Source: Sit@del2 - MEEDDM/CGDD/SOeS - 2019 (to date)
Excluding agriculture and public services

In terms of tertiary and business property, the urban area of Lyon is ranked 1st among France's major metropolises (excluding Paris) according to the Arthur Loyd attractiveness index.

Source: Arthur Loyd barometer 2020



CRAFT

→ Number of businesses in craft industries

Food	Production	Building	Services	Unknown activities	Total
20,886	31,792	76,706	64,296	717	194,397

Source: Chambers of Trades and Crafts, 31/12/2019

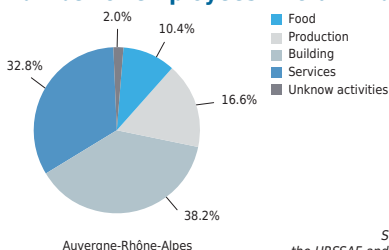
→ Number of employees per activity sector

Auvergne-Rhône-Alpes

Food	32,200
Production	51,719
Building	118,926
Services	101,952
Unknown activities	6,268
Total	311,065

Source: URSSAF treatment after cross-referencing the URSSAF and CRMA databases (Trades Directory), 31/12/2019

→ Number of employees in craft industries



Source: URSSAF treatment after cross-referencing the URSSAF and CRMA databases (Trades Directory), 31/12/2019



AGRICULTURE

→ Farms and population

	Auvergne-Rhône-Alpes (number)	Auvergne-Rhône-Alpes / Metropolitan France (%)
Farms (2017)	52,640	12.3
Family working population (2018)	58,824	13.4

Source: Agreste - agricultural census, annual review of agricultural employment - Estimates
Family working population in AWU (quantity of work in a year provided by a working person working full time)

→ Agricultural land

	Auvergne-Rhône-Alpes	Metropolitan France
Utilised agricultural area (hectares)	3,105,000	28,637,700
Proport. of utilised agric. area / total surface (%)	43.6	52.2
Proport. of wooded areas / total surface (%)	37.4	30.9

Source: Agreste, annual agricultural statistics, 2019, provisional data

→ Organic Agriculture

	Auvergne-Rhône-Alpes	Metropolitan France
Area in organic agriculture (land already organic or in process of conversion) (ha)	273,700	2,235,320
Share of the utilised agricultural area (%)	9.5	8.3

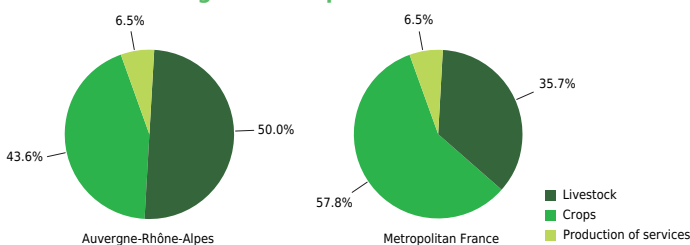
Source: Agreste, Agence Bio, provisional data for 2019
Utilised agricultural area of farms

→ Income from agricultural produce

	Auvergne-Rhône-Alpes	Auvergne-Rhône-Alpes / Metropolitan France (%)
Livestock	3,000 M€	11.2
Crops	2,614 M€	6.0
Production of services	388 M€	7.9

Source: Agreste, agriculture accounts 2019, provisional data

→ Distribution of agricultural produce



Source: Agreste, agriculture accounts, 2019, provisional data

→ Main agricultural production

Auvergne-Rhône-Alpes holds 67 Appellations d'Origine (AOC/AOP). The region notably distinguishes itself by its production of quality wines, its livestock, the richness of its orchards, its cereal production and specialty cheeses. Furthermore, Auvergne-Rhône-Alpes has the second-largest utilised area for organic farming in France (certified area).

Do you wish **to succeed in new markets, identify and get to know** your future clients or suppliers, organise **competitive monitoring** or **promote** your company?

Get in touch with the companies registered with the Registry of Trade and Companies thanks to **databases** of the Chambers of Commerce and Industry:

↳ Comprehensive database of **companies present in Auvergne-Rhône-Alpes.**



→ **Contact your local chamber**

↳ Comprehensive **national business directory.**



→ **Contact your local chamber**

↳ **For more information:**

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