

Cotentin Economic overview

2018



NORMANDIE



CCI OUEST NORMANDIE



leCotentin
COMMUNAUTÉ D'AGGLOMÉRATION

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1,420 km²

150 km of coastline

the 4th largest urban area in Normandy

181,321 inhabitants

Over 2,000 students

40 activity zones

Pleasure boating: Cherbourg,
the largest marina on the Channel coastline

Pleasure boating:
over 3,700 moorings available

Fishing:
Cherbourg, the 3rd largest port in Normandy

819 companies created in 2016

11,834 establishments

53,790 salaried jobs

Editorial

We are pleased to present you the 2018 version of our economic overview, which focuses on Cotentin: its regional organisation, its demographic weight and its economy.

Indeed, we found it important to offer a concise, visual tool on the assets of our region that, since January 1, 2017, has become a sizeable structure covering 132 municipalities: The Metropolitan Community of Cotentin. This new community will promote the economic development of Cotentin.

The Metropolitan Community of Cotentin and the West Normandy CCI wished to jointly develop an economic overview for Cotentin. By pooling our knowledge and skills, we have produced a concise, functional document with attractive visuals. It presents Cotentin, a dynamic area offering many assets for the development of economic activities.

This document, we hope, will be a valuable tool in the decision-making of economic actors.

We hope you will enjoy reading it.

Jean-Louis VALENTIN
President
of the Metropolitan Community
Cotentin

Benoît ARRIVÉ
1st Vice-President
of the Metropolitan Community
Cotentin
Mayor of Cherbourg-en-Cotentin

Daniel DUFEU
President
of the Chamber of Commerce and Industry
West Normandy

Dominique LOUZEAU
President
of the Delegation of
Cherbourg-Cotentin

Cotentin in brief

The Metropolitan Community of Cotentin was officially created on **January 1, 2017** by the Ministerial Order of November 4, 2016.

It is the result of the merger of **9 federations of municipalities**: Douve et Divette, Les Pieux, Côte des Isles, Vallée de l'Ouve, Cœur du Cotentin, Montebourg, Val de Saire, Saint-Pierre-Église and La Saire.

It also includes **the new municipalities** of Cherbourg-en-Cotentin (resulting from the transformation of the Metropolitan Community of Cherbourg) and La Hague (resulting from the transformation of the Federation of Municipalities of La Hague).

Today Cotentin includes **132 municipalities** in which there are over **181,000 inhabitants**.

The **4th largest urban area in Normandy**, Cotentin offers its inhabitants a quality living environment and a varied range of transportation that is continually evolving to optimise the mobility of its population.

Cotentin is rich in local "terroirs" and authentic landscapes, located at the northern tip of the Department of the Manche, between land and sea.

Like the Manche Department, Cotentin has a rich agriculture and is the **leading agricultural Department** in France, specialising in livestock (cattle, sheep and horses), fruits (apples) and vegetables (carrots, leeks and cauliflower). The diversity and quality of this agricultural production have led to the development of agro-food companies such as the Maitres Laitiers du Cotentin.

Owing to its location on a peninsula, the sea is ever-present in the local economy and it promotes the development of many economic activities such as **fishing, pleasure boating, maritime connections** (cross-Channel traffic in particular), and **shipbuilding** with large companies like the Naval Group and Constructions Mécaniques de Normandie.

Cotentin is also a **heavily industrialised** region.

Nuclear energy is very important in Cotentin with establishments like EDF (the French electricity company), and the reprocessing plant of Hague d'Orano.

The energy sector occupies a preponderant place in the economic activity of Cotentin.

50 years of large projects (ORANO, EPR, the Flamanville project) have thus greatly boosted the territory, with exceptional population growth, a massive influx of investments and a direct effect on the economic development of Cotentin and its facilities.

The nuclear industry is today the **largest employer** in the private sector.

There are nearly **54,000 salaried jobs** in the area, nearly ¼ of which are in industry.

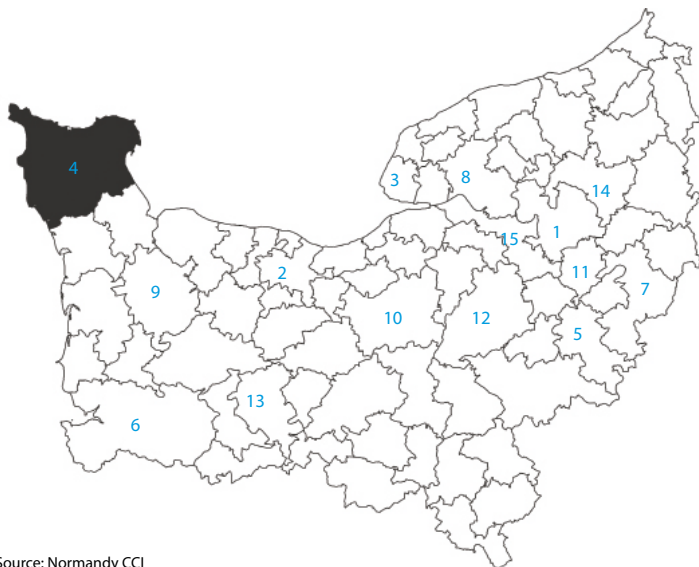
Business plans for recruitment are on the rise overall, and more particularly in the industrial trades.

With **150 kilometres of coastline**, the Cotentin economy is also based on green and seaside tourism offering multiple activities related to nature and heritage.

Cotentin in pictures



Cotentin in Normandy



Source: Normandy CCI

Inter-municipal communities with over 50,000 inhabitants (01.01.2017)

1. Greater Rouen, Normandy
71 municipalities 663.8 km²
489,428 inhabitants

9. Saint-Lô Agglo
64 municipalities 806.4 km²
75,799 inhabitants

2. UC of Caen La Mer Normandie
50 municipalities 326.9 km²
264,376 inhabitants

10. MC of Lisieux Normandy
48 municipalities 901.4 km²
73,647 inhabitants

3. MC Havraise (CODAH)
17 municipalities 190.7 km²
236,133 inhabitants

11. MC of Seine Eure
36 municipalities 324 km²
68,848 inhabitants

4. MC of Cotentin
132 municipalities 1439.4 km²
181,321 inhabitants

12. Intercom Bernay Terres de Normandie
80 municipalities 928.1 km²
56,539 inhabitants

5. MC of Evreux Portes de Normandie
62 municipalities 530.6 km²
102,756 inhabitants

13. Flers Agglo
42 municipalities 567.7 km²
54,445 inhabitants

6. MC of Mont Saint Michel Normandie
97 municipalities 1543.9 km²
88,067 inhabitants

14. FM of Inter-Caux-Vexin
64 municipalities 543.3 km²
54,009 inhabitants

7. Seine Normandie Agglo
66 municipalities 718.4 km²
84,824 inhabitants

15. FM of Roumois Seine
62 municipalities 503.4 km²
53,535 inhabitants

8. Caux Seine Agglo
50 municipalities 574.3 km²
76,842 inhabitants

* MC = Metropolitan Community
FM = Federation of Municipalities
UC = Urban Community

Cotentin by centre

Population by local centre

		Population 2015	Establish- ments 2016	Empley- ees 2016
New municipality	Cherbourg-en-Cotentin	80,616	4,260	28,239
New municipality	La Hague	11,824	777	8,421
Local centre	Coeur du Cotentin	25,384	1,873	6,147
Local centre	Les Pieux	13,508	835	3,707
Local centre	Val de Saire	8,881	934	1,940
Local centre	Saint-Pierre-Eglise	8,584	617	782
Local centre	Douve Divette	8,207	446	1,091
Local centre	Côte des Isles	8,195	829	1,285
Local centre	Montebourg	6,846	587	1,236
Local centre	Vallée de l'Ouve	5,949	545	841
Local centre	La Saire	3,327	131	101
	Total	181,321	11,834	53,790

Source: INSEE

Key figures

132 municipalities - 2 new municipalities - 9 local centres

the 4th largest metropolitan centre in Normandy
the largest metropolitan centre of the Manche Department

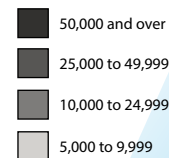
11,834 establishments in 2016 including 36% in Cherbourg-en-Cotentin

53,790 salaried jobs in 2016 including 52.4% in Cherbourg-en-Cotentin

Distribution of the population by centre in 2015



Distribution of the population by centre in 2015



Source: INSEE 2015

Territory > Living environment

A real quality of life

In contrast to its reputation linked to the "umbrellas of Cherbourg", on average Cherbourg has half as much rainfall as Biarritz.

Sunshine

Nantes has only 10 days more sunshine and Paris has 6 days.

Cherbourg has excellent air quality according to Atmo Normandy. In 2016, we had 309 days when the ATMO index was good or very good.

Safety

Cherbourg and the Manche Department have some of the lowest crime rates in France. In 2016, the Manche Department had the lowest crime rate in France.

Events

- The Biennial of the 9th art undertook an innovative step: to present the leading comic strip artists to the public through major thematic exhibitions.
- Women in the city: Festival on the place of women in society
- Peninsula in Bloom: Exhibition-sale of plants and herbs, organised every two years
- The Art'zimutés: Multidisciplinary festival (popular music, circus arts, visual arts and sustainable development)
- Les Traversées de Tatihou
- ...

Education in the Arts

- The Cherbourg-en-Cotentin Conservatory of Music
- The Caen/Cherbourg College of Arts and Media
- Artistic workshops: dance, theatre and music
- Schools of music in Les Pieux and La Hague

Cultural facilities

Cotentin: an area rich in landscapes and local "terroirs", with a diverse and carefully preserved heritage.

LE QUASAR in Cherbourg-en-Cotentin provides 4 cultural facilities:

- The Trident: the National Theatre of Cherbourg-en-Cotentin offers a very diversified programme on 3 sites: the Italian Theatre, the Butte Theatre and the Vox.
- The Artothèque: a loan service of works of art and entertainment
- The Jacques Prévert Library
- The Thomas Henry Art Museum: the 3rd most important fine arts museum in Normandy by the historical and thematic richness of its collections

A network of libraries, media libraries and toy libraries throughout the Cotentin.

Other centres dedicated to culture and/or art

- Le Point du jour: an art centre oriented towards photography, which combines exhibitions, residencies and publishing.
- La Brèche, the national centre for circus arts of Normandy, which aims to promote access to the circus arts and related aesthetic forms, and encourage creative performances.
- Cultural areas: Les Pieux, La Hague

Quality sports facilities

- 7 swimming pools
- 3 golf courses including 2 with 18 holes
- 2 horse-racing stadiums, 1 horse racecourse
- 1 go-kart track
- many tennis and badminton complexes...

And activities in the air:

- 1 gliding centre
- 1 flying club
- 1 school of paragliding and hang-gliding
- parachuting

Territory > Health

Key figures

The Cotentin Public Hospital Centre (CHPC) offers a wide range of care owing to its multidisciplinary teams and high-performance equipment.

929 beds

300 physicians

2,145 employees (non-medical staff)

The Cotentin Public Hospital Centre also provides short-stay services:

- a reception and emergency treatment service, equipped with a mobile emergency and intensive care unit (SMUR) and a medico-psychological unit;
- services providing numerous medical, surgical and obstetrical specialties with consultations, operational explorations, operating theatres and hospital beds;
- a medical imaging service, with scanner and MRI, a particle accelerator, biology and pathology laboratories, a branch of the French Blood Establishment, a physical medicine and rehabilitation service;
- logistics services are also available there.

These medical services are optimised by partnerships with other health facilities, including the Cotentin Polyclinic and SOS doctors, providing 24-hour service.

The Cotentin Public Hospital is an inter-municipal public health institution resulting from the merger, on April 1, 2006, of the Louis Pasteur Hospital in Cherbourg-en-Cotentin and Valognes Hospital.

Number of liberal health professionals per 10,000 inhabitants

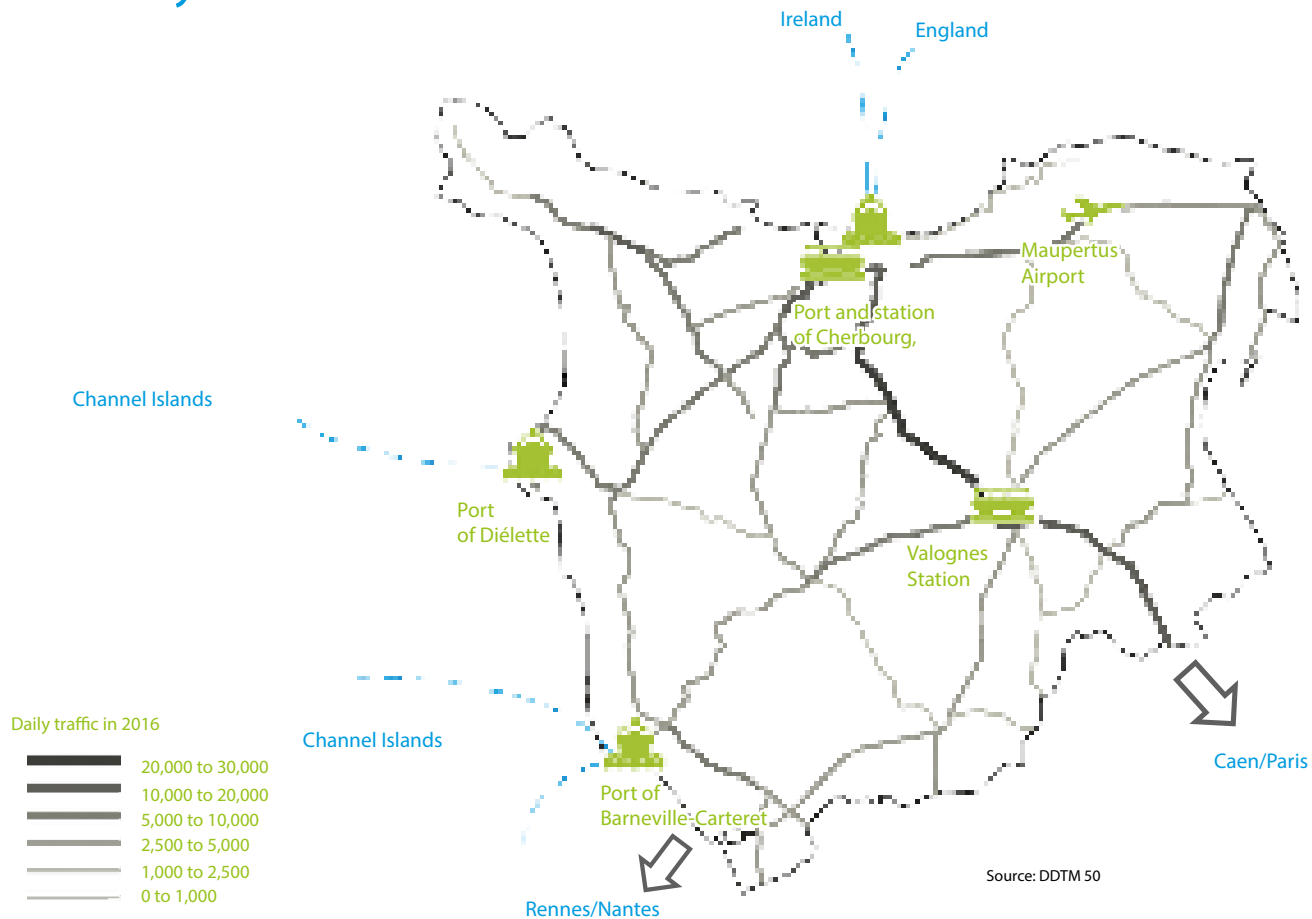
	MC of Cotentin	Normandy
General practitioners	8	8.5
Dentists	2.9	3.64
Ophthalmologists	0.48	0.67
Nurses	10.91	9.67
Physiotherapists	6.4	6.57
Pharmacies	3.17	3.2
Midwives	0.91	0.62

Source: DREES

Moreover, in the Cotentin area, according to data from the Primary Health Insurance Fund (CPAM), there are:

- 1 Mobile Health Centre located in Les Pieux and 2 planned for Valognes and Cherbourg-en-Cotentin.
- 7 Public Services Centres: La Glacerie, Barneville-Carteret, Saint-Sauveur-Le-Vicomte, Montebourg, Quettehou, Beaumont-Hague and Montfarville.
- 1 nursing association health centre: Cherbourg-en-Cotentin
- 1 mutual health centre: Cherbourg-en-Cotentin
- 1 health centre planned for Cherbourg-en-Cotentin.

Territory > Infrastructures



Territory > Infrastructures

Transport infrastructures and road traffic

Open to the sea, the area has a strong maritime character that enables it to offer a high quality of life.

Built in the 18th century, the harbour of Cherbourg is the largest artificial harbour in the world.

By car: 3.5 hrs from the Paris Region/2 hrs from Greater

Rennes/1 hr from Caen

By train: Cherbourg-Paris 3 hrs

By boat: England (Portsmouth, Poole), Ireland (Dublin, Rosslare), Channel Islands (Jersey, Guernsey, Aurigny and Serq)

Motorways

A motorway and a dense road network

The N 13, the true “spinal column of Cotentin” connects Cherbourg to Caen by dual carriageway in 1 hour, then to Paris via the A 13 motorway.

FROM Carentan, the N 13 reaches the N 174, which links it with the Estuaries motorway, the A 84.

The N 13 is a major axis in terms of road traffic and a vector of development for the region.

Air Transport

The Cherbourg-Maupertus Airport is a civil airport, open to public air traffic, located in the Municipalities of Maupertus-sur-Mer and Gonneville 11 km East of Cherbourg-en-Cotentin. The “sunshine” destinations (Southern Europe, the Mediterranean) are given priority at the airport with a wide choice of holiday charter flights.

Maritime transport

Positioned at the Western entrance to the English Channel for connections with the West coast of England and Ireland, the cross-Channel terminal of Cherbourg provides outstanding conditions for the reception of the latest generation of ships at all times and in all weather conditions.

There are daily lines such as Poole & Portsmouth (Brittany Ferries) for the United Kingdom, and Rosslare Ferries (Irish Ferries and Stena Line) for Ireland with weekend stopovers in Dublin (Irish Ferries).

A new ferry is planned: the YEATS, the biggest ferry in the world.

“In the summer 2018, Irish Ferries plans to double the number of trips to Dublin from Cotentin.”



Population > A territory of weight

Key figures

181,321 inhabitants

The **largest** community of the Manche Department

The 4th largest metropolitan area of Normandy with 3,339,131 inhabitants

The **largest** metropolitan area of the Manche Department with 499,287 inhabitants

¼ of the population is under 25 years old.

Cotentin: the 2nd largest metropolitan community in France with 132 municipalities

The largest intermunicipal communities on January 1, 2018 (in numbers of municipalities)

Metropolitan Communities	Municipalities	Population (1)
Pays Basque	158	302,980
Cotentin	132	181,321
Béthune-Bruay, Artois-Lys Romane	100	277,730
Mont-Saint-Michel-Normandie	97	91,773
Agglo Pays d'Issoire	90	53,879
Loire Forez	88	108,187
Région de Château-Thierry	87	55,114
Tarbes-Lourdes-Pyrénées	86	122,581
Carcassonne Agglo	82	111,159
Troyes Champagne Métropole	81	169,663
Agglo du Pays de Dreux	78	112,820

(1) total legal effective population in 2018 (calculated from 2015)

Source: INSEE 2015

The **largest** inter-municipal community of the Manche Department, with 36.3% of the population of the Department

From the demographic point of view, here are the main municipalities of the region (in numbers of inhabitants):

- the Municipality of Cherbourg-en-Cotentin alone represents 47.8% of the population of Cotentin with 80,616 inhabitants,

- followed by the Municipality of La Hague with 11,824 inhabitants,

- then the Municipalities of Valognes: 6,807 inhabitants, Bricquebec-en-Cotentin: 6,026 inhabitants and Les Pieux: 3 282 inhabitants.

Population of the Public Establishments for Inter-Municipal Cooperation in the Manche Department



Population > Structure

An area that follows national trends

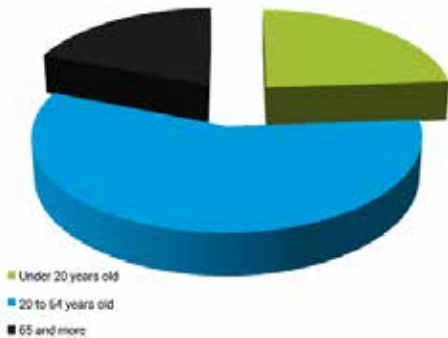
Population by age group in 2014 (in %)

	Cotentin	Normandy
■ Under 20 years	23.9	24.7
■ 20 to 64 years	57.1	56.3
■ 65 years and over	19	19

Source: INSEE, RP 2014

A quarter of the population of Cotentin is under 20 years old; this proportion is comparable to those observed at regional and national levels.

Population by age group (Cotentin)

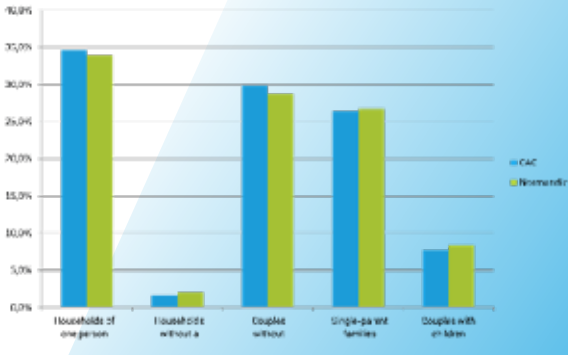


Households and families according to their composition in 2014: [80,946](#) households

Households and families	■ Cotentin	■ Normandy
Households of one person	34.6	34
Households without a family	1.6	2.1
Couples without children	29.8	28.8
Single-parent families	7.6	8.4
Couples with children	26.4	26.8
Large families	8.8	9.2

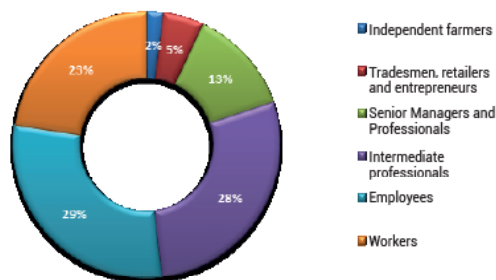
Source: INSEE, RP 2014

The average household size is 2.2, which is comparable to the national average. One-person households account for nearly a third of Cotentin households, a proportion that is also similar to those observed at the national level.



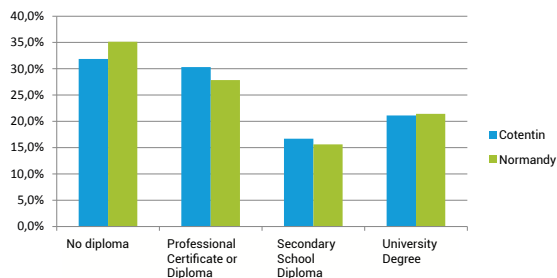
Population > Structure

Senior managers and mid-level professionals are more numerous in Cotentin



Source: INSEE, RGP, répartition de la population active (15-64 ans) selon la catégorie socio-professionnelle

Highest diploma of the out-of-school population aged 15 and over



Source: INSEE, RP 2014

Population aged 15 and over by type of activity

	Cotentin	Normandy
Total	114,512	2,086,512
Active population	72.8	72.9
Active population with a job	63.7	62.9
Unemployed	9.1	10
Inactive population	27.2	27.1
Students and trainees	8.6	9.7
Retired, pre-retired	10	9.3
Other inactive groups	8.6	8.1

Source: INSEE, RP 2014

Income/standards of living (in 2014)

	Cotentin	Normandy
Median income	€19,746	€19,990
Poverty rates	12.5%	13.6%

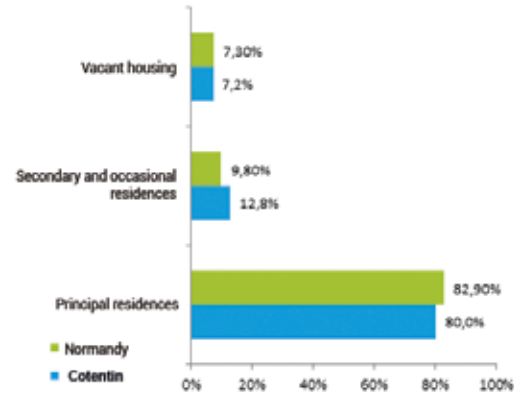
Source: INSEE, RP 2014

Population > Living conditions

Housing

	Housing 2009	Housing 2014	Trend
MC of Cotentin	97,478	101,159	3.78%

Source: INSEE



Source: INSEE, RP 2014

8 out of 10 dwellings are principal residences and 58.9% of dwellings are owned by their occupants in Cotentin, as in Normandy.

Proportion of equipment in services (for 10,000 inhabitants) in 2016

Types of equipment	Proportion of equipment in Cotentin	Proportion of equipment in Normandy
Social services equipment	7.7	9.5
Teaching equipment for primary education	8.0	8.7
Teaching equipment for secondary education	2.3	2.2
Medical and paramedical equipment	40.5	41.2
Sports, leisure and cultural equipment	26.8	29.7
Personal services equipment	116.4	150.6
Health services equipment	7.8	7.8
Transport services	2.0	3.7
Total	211.5	253.4

Sources: Insee - BPE (2016), Insee - Recensement de la population (2014)



Economy > Jobs

Key figures

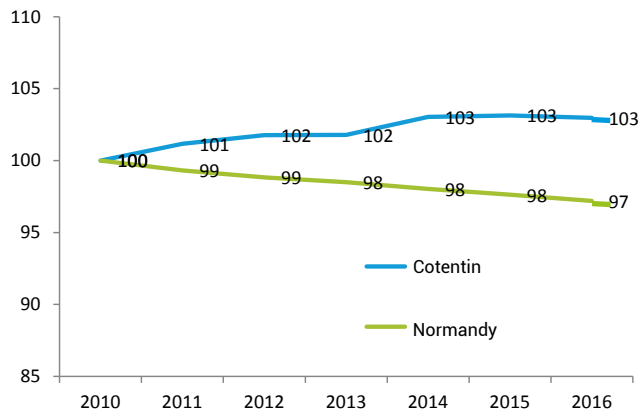
53,790 jobs

Cotentin: 88.8% of the active population
Normandy: 87.9% of the active population

Source: CLAP 2016

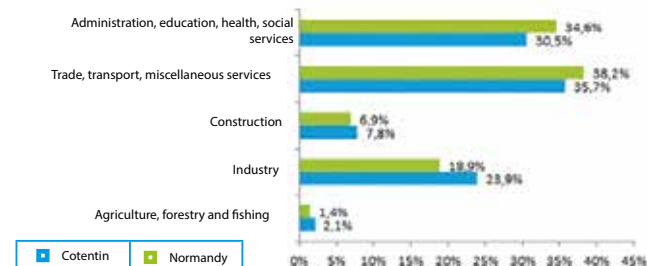
1,551 additional salaried jobs since 2010, or a growth rate of nearly 3% in Cotentin (2.8% decrease in Normandy).

Trends in salaried jobs 2010 - 2016



Source: Insee Clap 2010-2016

Share of salaried jobs by sector



Industrial jobs account for 23.9% of salaried jobs in Cotentin, compared with 18.9% for the Region.

The main employers

Energy:
ORANO (formerly AREVA NC)
EDF CNPE of Flamanville
EDF

Shipbuilding:
NAVAL Group (formerly DCNS)

Agro-food:
Les Maîtres Laitiers du Cotentin

Public and non-profit sectors
Cotentin Hospital Centre
Municipality of Cherbourg-en-Cotentin
ACAIS (Association du Cotentin Association for Social Assistance and Integration)
CCAS (Municipal Social Services Centre)

Business
AUCHAN

Economy > Job Market

Key figures

5,817 recruitments planned in 2018, up by 80% compared with 2017

92,211 planned recruitments identified in Normandy in 2018, up by 24.5 % compared with 2017

Most profitable occupations in 2018*

Services Sector

- Café-restaurant servers
- Self-service employees
- Maintenance employees
- Professionals of socio-cultural events



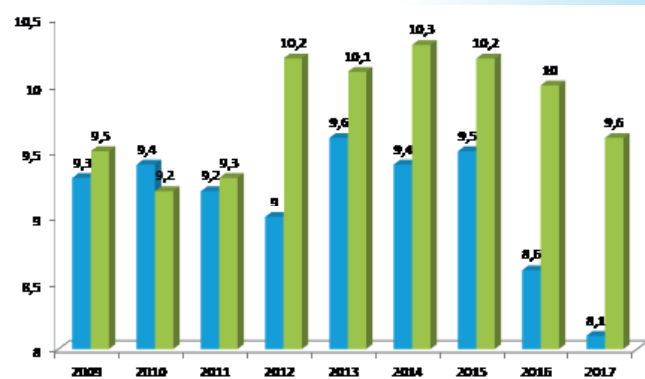
Industrial sector

- Welders
- Pipefitters
- Boilermakers
- Electrical technicians
- Engineers, executives
- Technicians, supervisors
- unskilled workers

Unemployment rates

• In the 3rd quarter of 2017: the unemployment rate was 8.1% in Cotentin (9.6% for Normandy)

• At the same time, there was a sharp increase in temporary jobs in 2016 (+ 31.7% over one year)



Source: INSEE - Pôle Emploi

■ Cotentin ■ Normandy

** according to a survey conducted by Pôle Emploi among businesses.

Economy > Companies

Key figures

Cotentin: **the leading** economic centre of the Manche Department/**the 4th** economic centre in Normandy

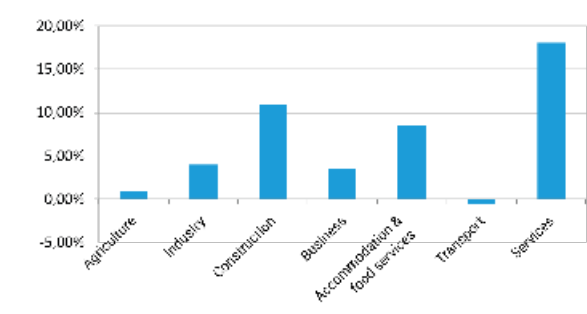
Number of establishments: **11,834**

28% of the establishments of the Department

9% of additional establishments between 2010 and 2016

Number of creations in 2016: **819**

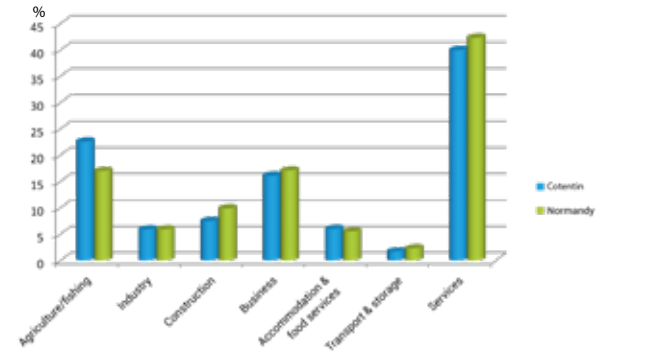
Trends in the number of establishments in 2010 - 2016 by sector of activity in Cotentin



Source: INSEE

Distribution of establishments by sector of activity - 2016

	Cotentin		Normandy	
	Number of establishments	%	Number of establishments	%
Agriculture/fishing	2,680	22.6	42,305	17
Industry	701	5.9	14,674	5.9
Construction	892	7.5	24,486	9.9
Business	1,907	16.1	42,321	17.1
Accommodation - food services	709	6	13,700	5.5
Transport storage	206	1.7	5,780	2.3
Services	4,739	40	104,877	42.3
Total	11,834	100	248,143	100



Source: INSEE

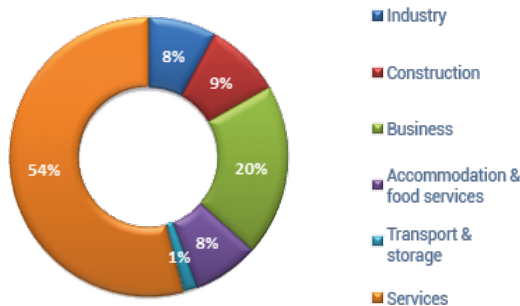
Economy > Business creation

Key figures

Growth rate in 2016
Normandy: 11.1%
Manche Department: 9.6%
MC of Cotentin: 9.8%

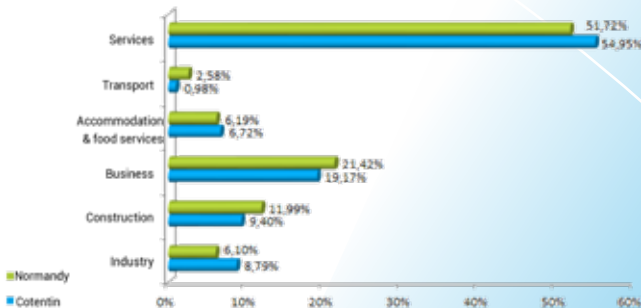
In 2016, nearly three-quarters of the companies created were in the business and services sectors.

819 companies created in 2016



Source: INSEE

Growth rate by sector of activity in 2016



Source: INSEE



Agriculture

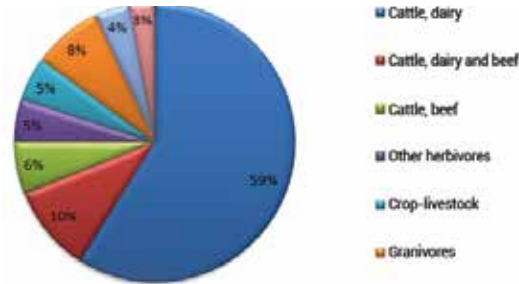
Cotentin: 1/4 of the Utilised Agricultural Area of the Manche Department

	Cotentin	Manche
Number of operations	2,425	11,328
Utilised Agricultural Area (ha)	104,947	427,119
Livestock	176,575	911,895
Agricultural Land Area	49,700	229,062

Source: recensement agricole 2010

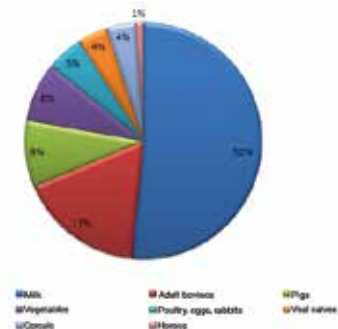
Cotentin, like the Department, is characterised by the importance of cattle and milk production.

Types of operations - Manche Department



Source: Chambre d'Agriculture Normandie

Sales of agricultural products in 2015 - Manche Department



Source: Chambre d'Agriculture Normandie

Dairy products accounted for over half of agricultural product sales in 2015 in the Manche Department.



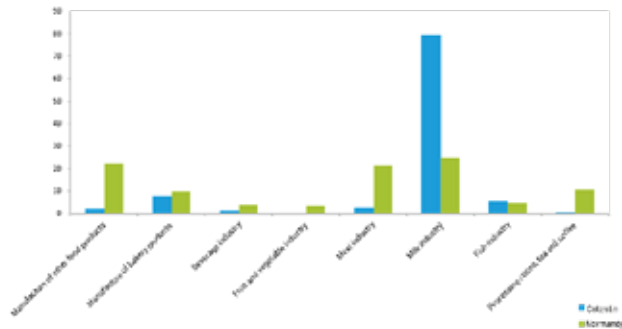
Agri-food industry

Cotentin has 47 agri-food industrial establishments, or nearly 6% of the companies in the Region.

Establishments/sectors	Cotentin	Normandy
Meat industry	11%	22%
Fish industry	11%	5%
Fruit and vegetable industry	6%	4%
Manufacture of other food products	13%	21%
Milk industry	6%	25%
Manufacture of bakery products	17%	9%
Processing cocoa, tea and coffee	9 %	10%
Beverage industry	28%	4%

Source: INSEE - 2016

Salaried jobs in 2016



Source: INSEE - CLAP - 2016

Agro-marine Sector: Over 1,000 jobs

The seafood processing industries are very important in Cotentin: 11% of agro-food establishments compared with 5% in the Region.

Cherbourg: the 3rd largest fishing harbour in Normandy with 5,500 MT of products landed.

Positive signs of local fishing were seen with the arrival of new, latest generation trawlers sponsored by several local shipbuilders.

Two zones of activity strengthen and encourage the primary processing industries and fish trading companies:

- the Produimer zone
- the Collignon industrial zone, supplied with sea water

Milk products Sector

"Les Maîtres Laitiers du Cotentin" has two production sites in Cotentin at Sottevast and Valognes and a third plant inaugurated in September 2017 at Méautis near Carentan.

Les Maîtres Laitiers employ (on these 3 sites) a total of nearly 900 people and produce butter, cheese, cream and 20 cl cartons of infant formula for the Chinese market.

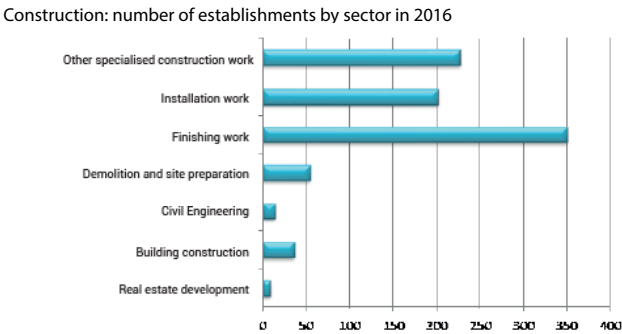


Construction

Key figures 2016

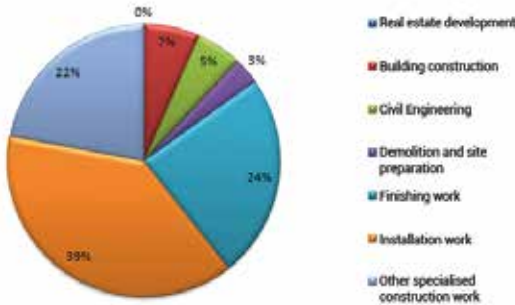
892 establishments in 2016
Over 4,000 jobs
Business creation rate: 8.62% in 2016
Construction represents 7.8% of salaried jobs in Cotentin compared with 6.9% in Normandy.

Establishments in 2016	
Real estate development	9
Construction of residential and non-residential buildings	36
Civil Engineering	14
Demolition work	54
Electrical, plumbing and other installation work	202
Finishing work	350
Other specialised construction work	227
Total	892



Source: Insee, SIRENE 2016

Distribution of salaried jobs by sector



Source: Insee, CLAP, 2016

Crafts

Key figures

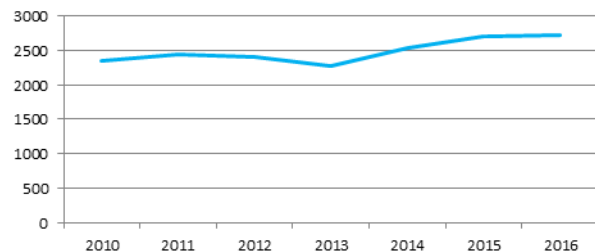
2,718 crafts industries in 2016 in Cotentin or 23% of the total number of establishments (25% in Normandy)

An increase of 16% in the number of craftsmen between 2010 and 2016 (+24% for the Region)

About 1/3 of craftsmen work in the construction sector and 1/4 in the services sector.

Business creation rate in 2016	
Business creation in the MC of Cotentin	229
Business creation rate in the MC of Cotentin	8.8%

Trends in the number of craftsmen

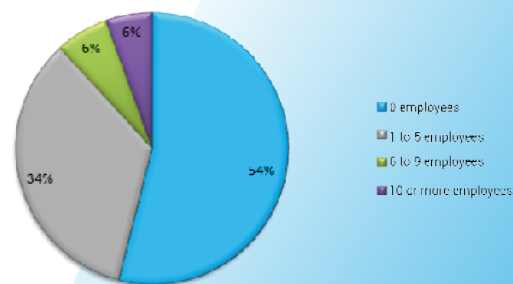


Source: INSEE Sirène 2010 - 2016

Number of craftsmen per local centre - 2014

Cherbourg-en-Cotentin	907
Coeur du Cotentin	473
Val de Saire	243
Côte des Isles	213
Les Pieux	193
La Hague	154
Saint-Pierre-Église	135
Montebourg	134
Douve et Divette	118
Vallée de l'Ouve	117
La Saire	31

Establishments of crafts industries by size of the labour force in 2016



Source: INSEE Sirène 2016

Industry

Key figures

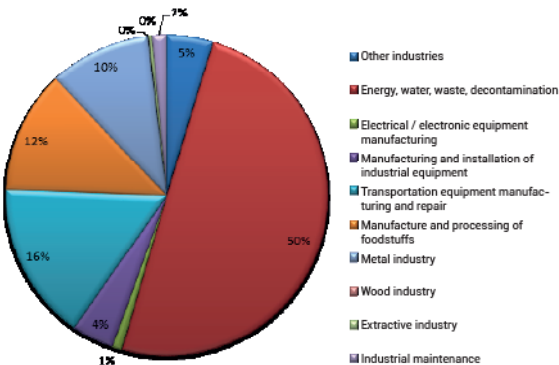
700 industrial establishments

Nearly 13,000 jobs

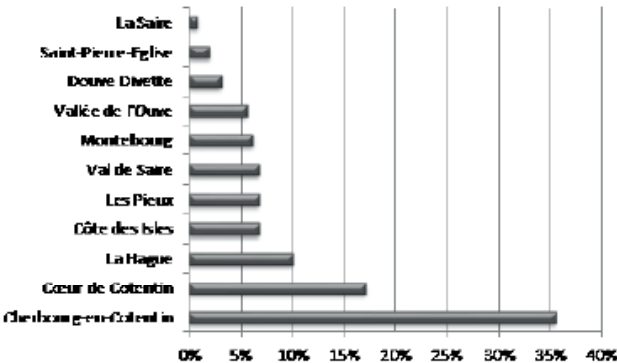
Some thirty establishments with over 50 employees, including the energy, shipbuilding, metalworking and agro-food sectors.

Energy represents 50% of industrial jobs.

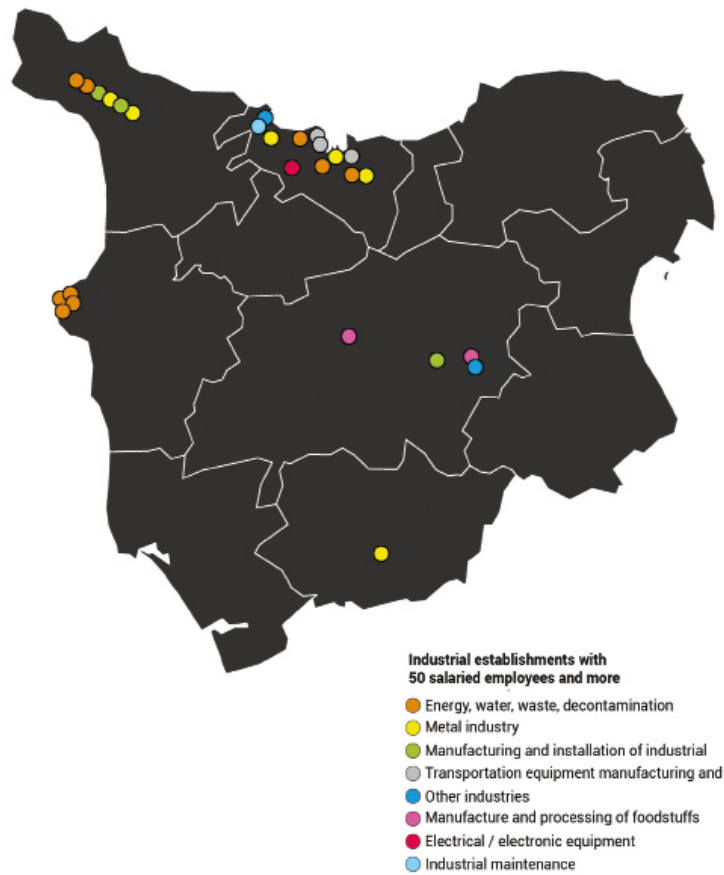
Distribution of industrial jobs by sector in 2016



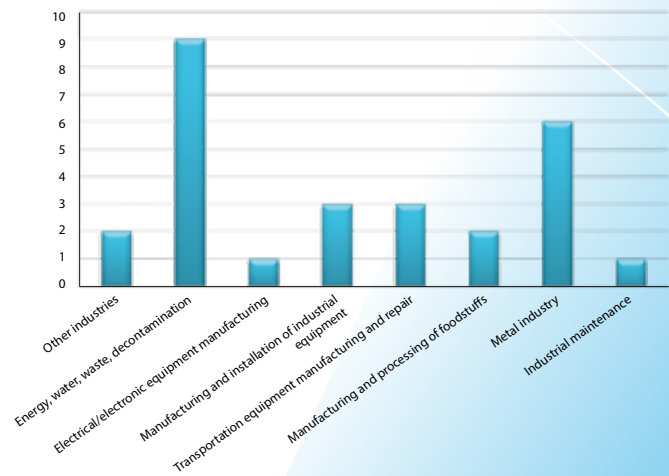
Distribution of industrial establishments by local centre



Industrial establishments with 50 salaried employees and more



Industrial establishments with over 50 salaried employees



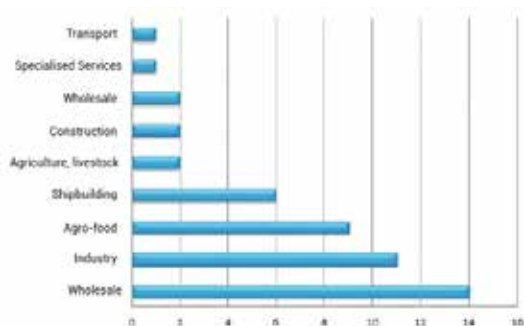
Source: INSEE - SIRENE - 2016

Economy > Exports in Cotentin

Export companies

Nearly **fifty** export companies dominated by wholesalers (seafood and market gardening).

Cotentin: number of export companies in 2016 by sector



Source: Direction Générale des douanes et Droits Industriels - 2016

Main export companies in Cotentin

Wholesale: Pinteaux Renet, Les Viviers du Cap, Établissement Gosselin, Ameris France

Agri-food industry: Les Maîtres Laitiers du Cotentin, Société Atlantique de Mariculture

Industry: Société Simon, Areva Temis

Shipbuilding: MSI Solutions, Allures Yachting

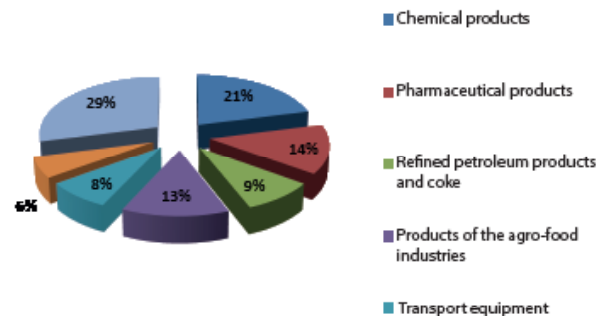
Economy > Exports in Normandy

the **6th** most important Region for external trade: 64 billion euros - 2016
 30.7 billion euros in exports, ranks 6th nationally
 33.3 billion euros in imports, ranks 6th nationally

57% of exports from Normandy go to Europe,
15% go to Asia,
12% go to America,
11% go to Africa.

3,720 export companies (head offices in Normandy) - 2016

Distribution of exports by category of products in % - 2016



Innovation > Know-how

Cotentin is a land of innovation and excellent know-how in sectors such as agro-food, energy, shipbuilding and also metalworking, engineering and services with a high level of expertise.

Whether in terms of processing, products or risk management, Cotentin's economic fabric is full of nuggets that shine both nationally and internationally.

Here are some examples of these exceptional companies:

Agro-food

- Les Maîtres Laitiers du Cotentin: specialists in processing milk, dairy products and infant formula
- La Maison du Biscuit: hand-made production of traditional biscuits
- Saumon de France: salmon farming at sea unique in France
- Dielen: laboratory for the development of dietary supplements of natural origin
- Nutrifish: production of marine ingredients and active principles

- Engineering, risk management, expertise:

- Oreka ingénierie: architecture, design of workspaces and 3D simulation
- Technodoc: design of innovative solutions for information management
- Cerap: studies, engineering, training in the field of radiation protection; Cerap has a particle accelerator.
- ATRON Metrologie
- Efinor
- FIVA
- Amplexor

..

- Shipbuilding and boating:

- Naval Group: design and manufacture of submarines
- Facnor: designer and manufacturer of innovative sail winding systems
- Allures Yachting: design and manufacture of large sailing cruise ships
- Marelec: installation of electronic systems and navigational aids for fishing, yachting and merchant marine
- Cubisystem: design and manufacture of pontoons and floating systems
- Sparcraft
- M.S.I.
- CMN
- CMO

Cotentin also has companies with unique know-how:

- Le Véritable Cherbourg: umbrella factory awarded several prizes for their quality and innovative character
- Jellyfish: unique jellyfish farm in Europe
- Protec'Som: laboratory for the design and manufacture of anti-mite bedding
- Tricoterie du Val de Saire



Energy > Nuclear sector

The nuclear sector in Cotentin includes electricity generation, spent fuel recycling and waste management.

Renewable marine energies (offshore wind farms, tidal turbines...) are set to be a new development path for the region.

The major projects of Areva La Hague and EDF Flamanville have structured the local economy. The activity of subcontractors is strongly linked to these projects, whether in the field of metallurgy, engineering or construction.

Key figures

Nuclear energy

The leading employer in Cotentin with over **3,000 employees** ORANO (formerly Area).

Over **2,200** people are employed at EDF Flamanville 1 and 2 and over **4,000** employees are still working today at the EPR project.

About **140 local companies** have transferable skills in offshore wind energy.

The real weight of the nuclear industry in Cotentin is major as the number of subcontractors is high.

Regarding the main subcontractors, whose activity is related to the major contractors ORANO and EDF, nearly **13,000 jobs** in the private sector are involved in this sector, or 1 out of 3 jobs.

EDF: The Flamanville nuclear power station is a key economic player in the Normandy region.

In 2016, it produced 19.82 billion kilowatts per hour (kWh) or about 4.5% of French nuclear power generation. It employs over 800 people and 353 permanent employees of service companies.

Normandy Energies unifies the sector

Normandy Energies is the gateway to the Normandy industry in order to:

- guide companies looking for a service within the complexity of existing structures,
- provide local knowledge and expertise to local authorities,
- federate the actors by supporting structuring projects,,
- be a relay to local authorities and a relay of actors outside the Region.

The Normandy Energies Association includes the Nucléopolis cluster, made up of 4 major companies (ORANO, formerly AREVA, NAVAL GROUP, formerly DCNS, EDF and ENGIE), over 60 SME members and a dozen research laboratories and training institutes.

Nucleopolis
by NORMANDIE ENERGIES



Energy > Renewable marine energies

Offshore wind energy

Following the first call for tenders for offshore wind turbines launched in 2011, the French government awarded the construction of 3 offshore wind farms to the consortium led by EDF Energies Nouvelles.

Privileged sea access to England and Northern Europe, as well as existing skills and know-how are assets led to Cherbourg being chosen by the consortium for the construction of the blades and masts for the offshore wind turbines.

The port of Cherbourg hosts a 25,000 m² onshore assembly site for the manufacture of Haliade 150 wind turbines.



Tidal energy

With Raz Blanchard, one of the strongest marine currents in the world, Cherbourg and Cotentin are particularly well placed to accommodate plants for the construction of tidal turbines.



The Naval Group Open-Hydro assembly plant of 5,000 m² located in Cherbourg-en-Cotentin will be devoted to the construction of the seven turbines of the pilot farm, which is scheduled to be launched in 2018.

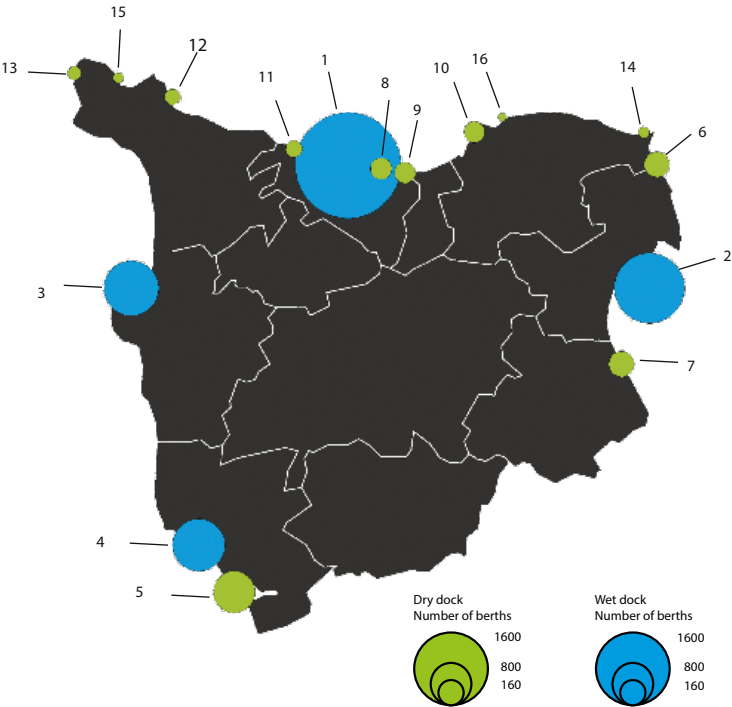
Maritime economy > Pleasure boating

Over **3,700 moorings** half of which are located at Port Chantereyne in Cherbourg-en-Cotentin.

The **leading port** of call for pleasure boats on the Channel-Atlantic Coast, Port Chantereyne has a capacity of **1,600 berths** and hosts the largest boating events: Course du Figaro, Challenge Mondial Assistance, Cutty Sark, Tall Ship Race and Drheam Cup.

Port Chantereyne is one of the leading French pleasure boat marinas in numbers of visitors. **6** pleasure boat marinas have received the Pavillon Bleu label.

Ports	Type of port	Berths/ pleasure boat moorings
1. Chantereyne	wet dock	1560
2. Saint-Vaast-La-Hougue	wet dock	760
3. Diélette	wet dock	494
4. Barneville-Carteret	wet dock	450 <small>(including 90 moorings)</small>
5. Portbail	dry dock	310 <small>(280 berths dry dock pontoon, 30 moorings)</small>
6. Barfleur	dry dock	130
7. La Sinope	dry dock	130
8. Port des Flamands	dry dock	95
9. Le Becquet	dry dock	90
10. Port Lévi	dry dock	90
11. Port de Querqueville	dry dock	60
12. Omonville-La-Rogue	dry dock	57
13. Goury	dry dock	40
14. Roubari	dry dock	31
15. Port Racine	dry dock	27
16. Pignot	dry dock	19



Source: Conseil départemental de la Manche (Manche Department Council)

Maritime economy > Fishing

Key figures

Cherbourg, **the 3rd** largest fishing port in Normandy (in MT): coastal and deep-sea fishing

1 fish marketing centre
3 landing centres

Gross revenues in 2017: **14,836 million euros**

Dynamic local shipbuilders are renewing their fleets

7 deep-sea vessels/ **90** coastal vessels/ **45** buyers (remote: by auction and by contract)

Nearly **140** fishing stations spread over the various ports of Cotentin.

The main species caught:

- whiting,
- dogfish,
- pout,
- smoothhounds,
- scallops,
- squid,
- soles...

Unusual products:

- Cotentin lobsters
- Barfleur mussels



Landing centres	MT in 2017
Cherbourg-en-Cotentin - 1	4,610
Saint-Vaast-La-Hougue - 2	678
Barfleur - 3	158
Barneville-Carteret - 4	62



Source: Centre de Marée (fishing port of Cherbourg en Cotentin)

Maritime economy > Connections and boating

Key figures

Cross-Channel traffic in 2017 (commercial port of Cherbourg-en-Cotentin)

- **619,843** passengers
- **190,947** vehicles
- **1,629,426** MT of goods
- **51,891** heavy goods vehicles

Connections with the Channel Islands in 2017

- Diélette: **15,037** passengers
- Barneville-Carteret: **21,525** passengers

Cruise ships in 2017

- **65,716** cruise ship passengers/**26 892** crew members
- Nearly **35** stopovers in 2017, the 2nd most popular port of call of the Channel Sea after Le Havre

A military port

The military port of Cherbourg is the home port for 4 military patrol boats, a support vessel for mine clearance divers and a very powerful high seas tug-boat from the Abeilles Company chartered by the French Navy.

Moreover, Cherbourg is a Maritime Prefecture of the Channel and the North Sea.

- A 120-hectare naval base with 13 military buildings
- The Cherbourg Arsenal is specialised in the construction of submarines.

Activities related to boating

An extensive range of services that are well distributed throughout the region

Boating activities	Clubs
Optimist sailboats	9 clubs
Catamarans ²²	9 clubs
Sailboards	7 clubs
Sand yachts	7 clubs
Dinghies	6 clubs
Stand-up paddle-boards	6 clubs

Boating activities	Clubs
Sea kayaking	6 clubs
Water-hiking	4 clubs
River kayaking	2 clubs
Sailboat cruising	2 clubs
Surfing	1 club
Kite-surfing	1 club



Maritime economy > Shipbuilding

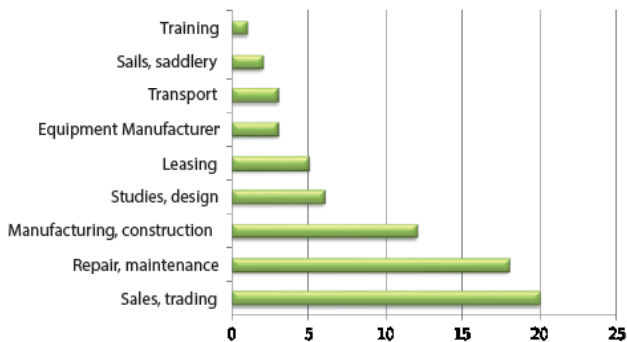
Key figures

87 companies
3,250 employees

The pleasure boating and shipbuilding sector includes the activities of:

- construction of ships and pleasure craft,
- sales and maintenance: re-sales of pleasure boats and other equipment, ship chandlers, ship repair services...
- equipment: professional equipment manufacturers, upholstery, sailmakers...
- rentals: tour operators and rental companies specialising in boating and yachting,
- services: experts, insurers, architects, communication...

Number of establishments



Source: Fichier consulaire – 2017

A shipbuilding activity representing nearly 80% of the workforce around 2 main establishments: Naval Group and CMN.

Along with the heavyweights of shipbuilding, Cherbourg and Cotentin have many well-known and recognised shipyards world-wide:

- FACNOR a world leader in sail winders
- Allures Yachting for cruising sailboats
- CMO repair and maintenance of French naval vessels
- M.S.I (Groupe Efnor), aluminium shipbuilding
- CUBISYSTEM, floating pontoons
- SPARCRAFT, manufacture of masts
- ...

Projects that strengthen the sector

Naval Group

- Barracuda: continuation of the programme including six submarines (delivery of the first in 2019)
- SNLE 3G: design studies
- Australia: launching of the current programme (study/engineering)
- Deconstruction of SNLEs: five submarines to be deconstructed (Veolia markets, Vinci for a total of 120 million euros, startup in 2018).

Naval maintenance centre of Cherbourg

- Development of the naval repair centre since the commissioning of the new 300 MT lift.
- Dynamism and structuring of the companies of the "Nautiport" club

Boating

- The Manche Departmental Council announced the launching of a "Boating Plan" based on an investment of €30 million over 5 years
- Marina extension projects (Cherbourg, Carteret, Granville...)

Business

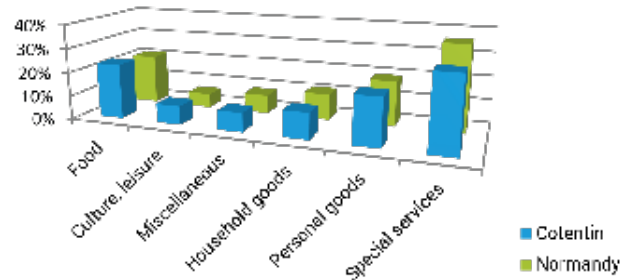
Key figures

The business sector has **1,884** establishments and provides about **5,700** salaried jobs in Cotentin.

Distribution of commercial establishments by activity

	Cotentin
Food	23% (427 establishments)
Culture, leisure	8% (144 establishments)
Miscellaneous	8% (147 establishments)
Household goods	11% (206 establishments)
Personal goods	20% (369 establishments)
Special services	31% (591 establishments)

Sources: Champ Observatoire Régional du Commerce, Insee - REE Sirène (2015)

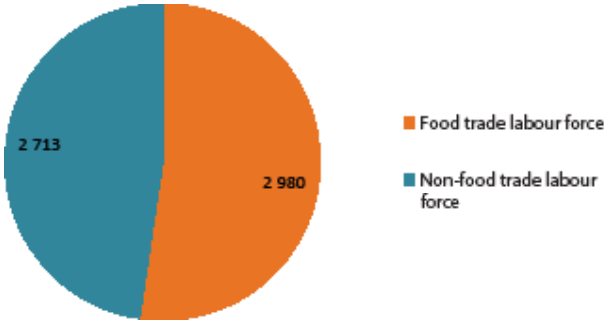


Distribution of salaried jobs

53% of establishments and 2/3 of the labour force are located in the urban centre of Cherbourg-en-Cotentin.

	MC of Cotentin
Food trade labour force	2,980
Non-food trade labour force	2,713
Total salaried jobs	5,693

Sources: Champ Observatoire Régional du Commerce, Insee - Clap (2014)



The food sector generates jobs: food establishments represent 23% of the total number of establishments in the region but account for 52% of the salaried workforce in retail trade.

Business

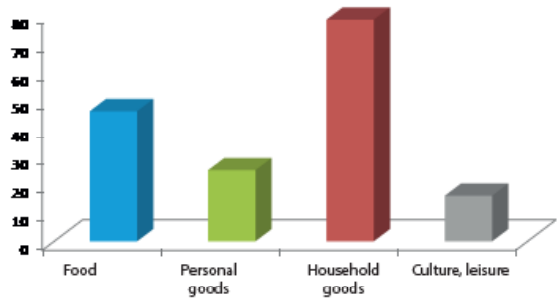
Large retail outlets are widespread in the area

Average non-food commercial density:
813 m² per 1,000 inhabitants compared with 700.8 m² per 1,000 inhabitants in metropolitan France (source: LSA expert).

Sectors of activity	Number of establishments with over 300 m ²	Total sales area in m ²
Food	46	90,471
Personal goods	25	22,372
Household goods	78	110,200
Culture, leisure	16	16,276
Total	165	239,319

Source: CCI Ouest Normandie

Number of establishments with 300 m² and +



Source: CCI Ouest Normandie

A potential market (excluding tourism) estimated at 1.06 billion euros

According to the Business Observatory of the Normandy Chamber of Commerce and Industry, the consumption potential for consumer goods by households residing in the Cotentin Metropolitan Community is estimated at: 1.06 billion euros representing an average expenditure of €13,220 per household per year for everyday consumer goods.

Product groups	Potential for consumption in millions of €	Potential for average consumption by household in €
Food	466.0	5,788.09
Personal goods	270.3	3,357.74
Household goods	196.2	2,437.56
Culture, leisure	131.7	1,636.45
Total	1,064.2	13,219.84

Sources: IDC - CCI de France - www.cciwebstore.fr (2017), Insee - Recensement de la population (2014)



Services > focus on Tourism

Key figures

1 Tourism Office- 19 Tourist Reception Offices

14,042 tourist accommodations (45,323 in the Manche Department)

90,381 tourist beds including over 70% of secondary residences

57 hotels

46 campsites

Tourism is the 3rd largest economic sector in the Cotentin area with 4,000 jobs and 650 businesses linked to this activity.

Our assets

3 ferry terminals offering connections to the Channel Islands, England and Ireland.

1 airport

5 tourist municipalities: Les Pieux, Portbail, Cherbourg-en-Cotentin, Quettehou, Saint-Vaast-La-Hougue

1 classified resort: Barneville-Carteret

17 boating clubs

30 cruise ship stopovers in 2017

Tourist accommodation

Commercial accommodation

1,360 hotel rooms

5,126 campsite pitches

853 seasonal rentals and hostels

169 guest rooms

12,839 secondary residences

Places to visit and cultural sites

124 tourist sites listed

Museums, châteaux, parks and gardens,
including the Cité de la Mer Marine Centre

UNESCO World Heritage sites

The Vauban Towers on Tatihou Island and Saint-Vaast-La-Hougue

Country of Art and History

The Clos du Cotentin: Bricquebec, Valognes and Saint-Sauveur-Le-Vicomte

5 Remarkable Gardens

Emmanuel Liais Park in Cherbourg, Gardens in tribute to Jacques Prévert in Saint-Germain-des-Vaux, Château de Urville-Nacqueville Park, Botanical Garden of the Château de Vauville, Château des Ravalet Park in Tourlaville.

Labels

Most Beautiful Village in France: Barfleur

Green Resort: Saint-Sauveur-Le-Vicomte

Famille Plus: the area of the Côte des Isles

Food services

2 restaurants with 1 Michelin star and 3 Bib Gourmands

A dream playground

A rich, protected natural heritage

230 km of coastline: beaches and trails, 5 beaches that have been awarded the Pavillon Bleu label for environmental quality.

Hiking, equestrian and cycling routes, including the GR223

Cotentin and Bessin Marshlands Regional Nature Park

17 remarkable natural sites, including the Cap de la Hague, the Cap Lévi, the Hatainville Dunes and the Saint-Sauveur-le-Vicomte Forest...

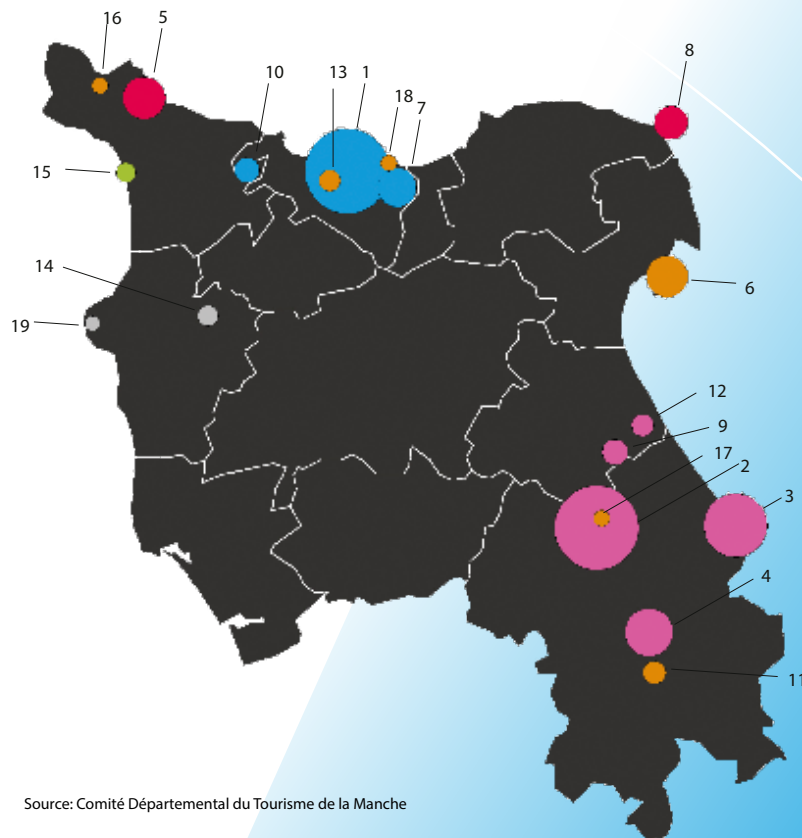
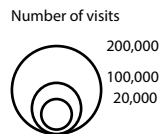
Services > focus on Tourism

Main tourist sites

- 1 - Cité de la Mer Marine Centre - Cherbourg-en-Cotentin (207,826 visits)
- 2 - Airborne Museum - Sainte-Mère-Église (195,616 visits)
- 3 - Utah Beach Landing Museum - Sainte-Marie-du-Mont (121,673 visits)
- 4 - D-Day Experience - Carentan Les Marais (73,216 visits)
- 5 - Tourp Manor Heritage Centre - Omonville-la-Rogue (58,673 visits)
- 6 - Maritime Museum of Tatihou - Saint-Vaast-La-Hougue (56,592 visits)
- 7 - Funbox Recreation Centre - Cherbourg-en-Cotentin (estimation, 51,000 visits)
- 8 - Gatteville Lighthouse (39,512 visits)
- 9 - Azeville Battery (23,923 visits)
- 10 - Ludiver Planetarium - Tonneville (22,810 visits)
- 11 - Marshlands Park Visitors' Centre - Carentan Les Marais (20,514 visits)
- 12 - Crisbecq Battery Museum (18,597 visits)
- 13 - Thomas Henry Art Museum - Cherbourg-en-Cotentin (18,235 visits)
- 14 - Théo Capelle Cidery (16,283 visits)
- 15 - Botanical Garden - Vauville (15,000 visits)
- 16 - Home of Jacques Prévert - Omonville-la-Petite (11,163 visits)
- 17 - Cotentin Farm Museum - Sainte-Mère-Église (10,248 visits)
- 18 - Centre for the Coast and the Environment - Cherbourg-en-Cotentin (10,162 visits)
- 19 - EDF Plant - Flamanville (9,790 visits)

Types of tourist sites

- Theme parks
- Museums
- Remarkable sites
- Gardens
- Industrial sites
- Military sites



Source: Comité Départemental du Tourisme de la Manche

Social > Social and solidarity economy

Key figures

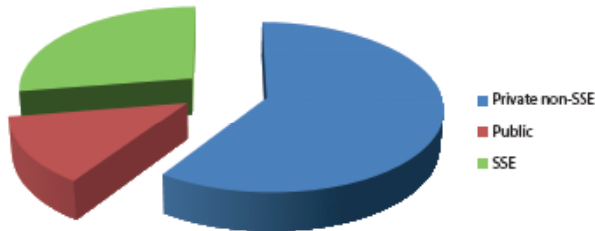
526 employer establishments (associations, cooperatives, mutual organisations and foundations)

6 352 salaried jobs

13.1 % of salaried jobs in the area and 18.1 % of private sector salaried jobs

152.7 million euros wage bill

Structure of salaried jobs in the MC of Cotentin



Source: Observatoire régional de l'ESS / CRESS Normandie, d'après INSEE Clap 2015

The SSE, what are we talking about?

The social and solidarity economy is a form of entrepreneurship and economic development adapted to all areas of human activity to which private legal entities adhere, fulfilling the following cumulative conditions:

- a purpose other than solely sharing profits,
- democratic governance, defined and organised by statutes, providing for the information and participation of partners, employees and stakeholders in the organisation's achievements,
- an ethical management in accordance with the following principles: the profits are devoted mainly to the objective of maintaining or developing the organisation's activity; the required reserves, which may not be shared, shall not be distributed.

The SSE consists of:

- cooperatives,
- mutual organisations,
- associations,
- foundations
- and businesses.

In Normandy, the Social and Solidarity Economy (SSE) 11,000 establishments and over 117,000 salaried jobs, or 11 % of salaried jobs in the Region. Within the Metropolitan Community of Cotentin, 526 establishments and 6,352 jobs come under the SSE sector.

Social > Social and solidarity economy

Jobs by type of organisation

4,179 jobs in associations

1,695 jobs in cooperatives

151 jobs in mutual organisations

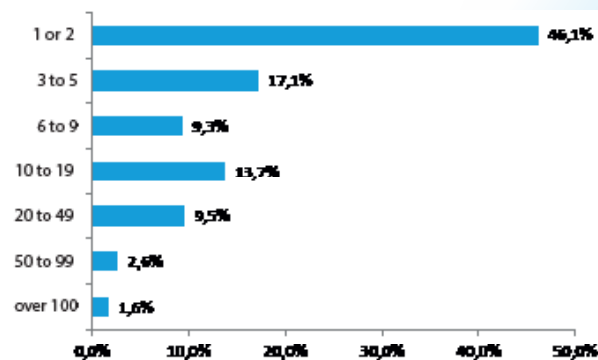
327 jobs in foundations

The non-profit sector is the largest SSE employer in the region with 4,179 employees (65.8% of SSE jobs).

SSE establishments and jobs in the main inter-municipal communities of the Region

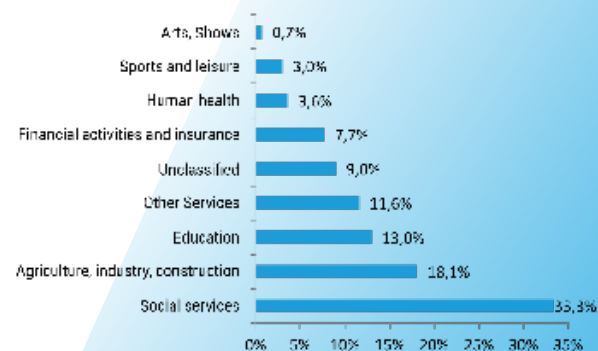
Inter municipal communities	SSE share of jobs
Saint-Lô Agglo	18.2%
Alençon	16.7%
Cotentin	13.1%
Evreux Portes de Normandie	12.8%
Caen la Mer	12.4%
Greater Rouen Normandie	10.3%
Havraise	9.2%

The majority of SSE establishments in the region have less than 10 employees (72.5%), although this is lower than for the whole of Normandy (78%).



Source: Observatoire régional de l'ESS/CRESS Normandie, d'après Liste des entreprises de l'ESS, 2017

SSE salaried jobs by main sector of activity in the MC of Cotentin



Training > Higher education

Key figures

Over **2,000** students

> Training facilities related to the economic actors of the area.

A university site

Cotentin has a university site that hosts over **2,000** students who can take courses in a university technology institute (IUT) or an engineering school (Esix).

Professional diplomas are also available.

Courses (short/long) prepare for several professions in connection with the sectors of activity of the territory (industry, tertiary sector, etc...).

Other higher education institutions

➔ INTECHMER (National Institute of Marine Technology) hosts over 100 students every year and offers scientific and technical training.

➔ Ecole des FOURRIERS provides nearly 750 students with military degrees in the fields of administration and food services.

➔ EAMEA (Military School of Atomic Energy Applications)

➔ INSTN (National Institute of Atomic Sciences and Technology) offers training in radiation protection.

➔ The Nursing Training Institute trains over 200 students per year

➔ ECD (School of Commerce and Distribution) of the FIM CCI Formation Normandie (training from a BTS to a Master's in Commerce and Accounting-Management)

In addition, several public and private secondary schools offer BTS courses and preparatory classes for over 350 students every year.

➔ ISPN: Normandy Higher and Professional Institute (from the Bac to the Bac +5)



Research

> Laboratories closely linked to industry and training organisations in the area.

University Laboratory of Applied Sciences of Cherbourg (LUSAC)

- 3 themes:

- Energy efficiency and heat transfer
- Energy storage and materials
- Runoff and the environment

Naval Group Technical Testing and Assessment Centre: Technical testing, Interaction of fluids/structures

Institute of Radioprotection and Nuclear Safety (IRSN): Radioecology

Atomic Study Group (EAMEA): Transfer of radionuclides, nuclear measurements

Corrodys: a technology centre specialising in marine and bacterial corrosion.

HRB (Areva research hall)

GREYC: research laboratory in digital sciences



Welcoming companies

Key figures

Real estate:

- 15,000 m² of activity zones including hotels and business incubators, storage and production workshops

Land (community zones):

- Over 40 activity zones
- 350 hectares of activity land
- 30 hectares available
- Nearly a dozen new activity zones planned

Distribution of economic activity zones - Cotentin



The Metropolitan Community of Cotentin is at your service for any request related to localisations.

For external skills, a support unit has been set up.

Contact the Economic Development Directorate,
Higher Education, Research and Innovation:
02.50.79.17.68



