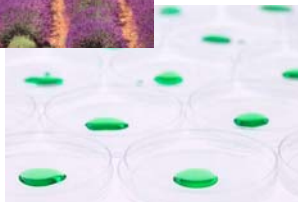


Cosmetics and Perfumery

in Provence-Alpes-Côte d'Azur

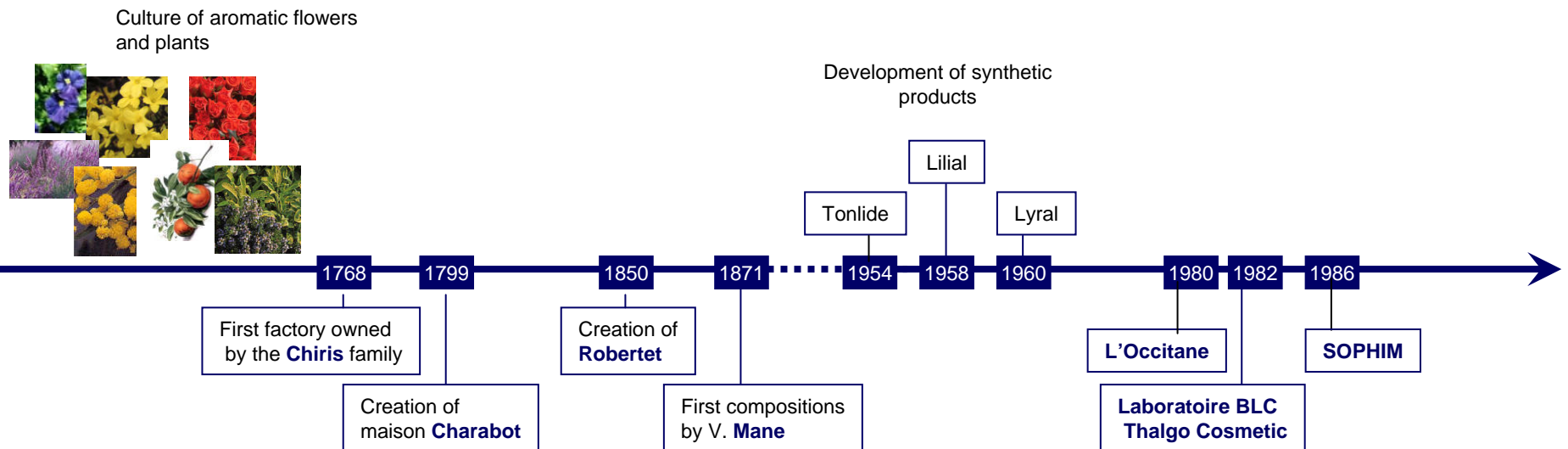


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1 Perfumes and cosmetics, a regional history

The Provence-Alpes-Côte d'Azur region has become a major centre for the perfumes and cosmetics industry, initially because it was here that the culture of the main varieties of aromatic plants and flowers was concentrated in the early days. At the start of the 20th Century, the different varieties of plants used in the manufacture of essential oils came mainly from Côte d'Azur. At that time, producers in Grasse began to develop various manufacturing processes such as enfleurage, distillation and extraction using volatile solvents. Since then, sources of supply have become very diversified, with particular use being made of chemistry.

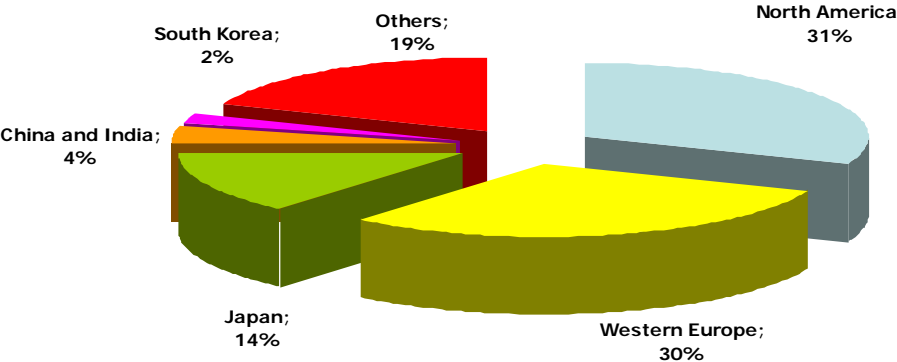


2

France, a key position in the cosmetics and perfumes market

Western Europe: the world's largest market alongside the USA

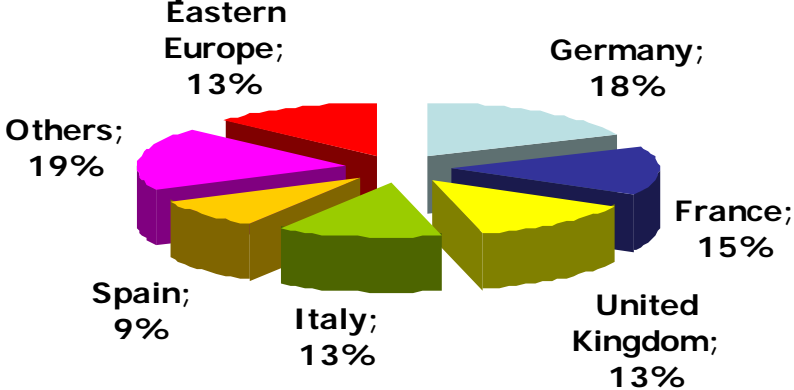
World cosmetics market in 2001



Source: Colipa Statistics Working Group

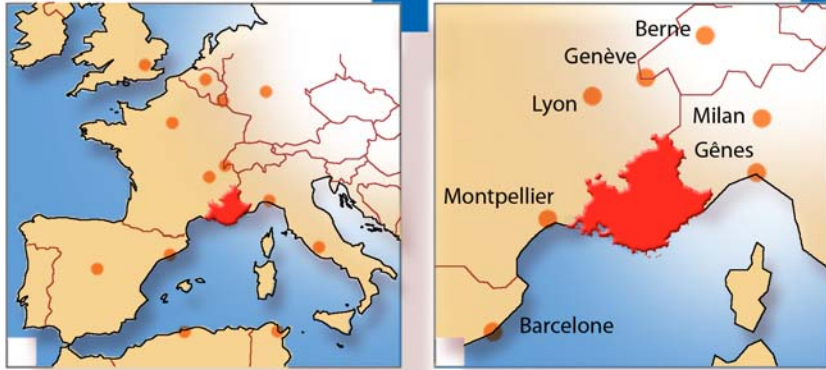
France: Europe's second largest cosmetics market

European cosmetics market in 2001



Source: Colipa Statistics Working Group

3 PACA, France's third largest regional economy



■ One of France's leading oil refining regions

- 28.9% of French refining
- 40% of national production



■ Steel production

- 25% of France's steel production



■ Agro-food industries and research

- 30 000 employees (Nestlé, Haribo, Mc Cormick, Kerry, etc.)
- 700 agro-food companies with more than 10 employees)



■ Life sciences

- More than 500 companies
- France's second largest centre for health research



■ Audiovisual – multimedia

- 15 % of national production



■ Microelectronics

- 35% of national semiconductor production
- Texas Instruments, Philips, Atmel, ST Microelectronics
- European regional leader in the chip card industry – headquarters of GEMPLUS



■ Southern European telecommunications hub

- France's largest concentration of telecommunications operators outside Paris



■ Sophia Antipolis, Europe's leading centre for wireless communications



■ France's second largest aerospace research and manufacturing region

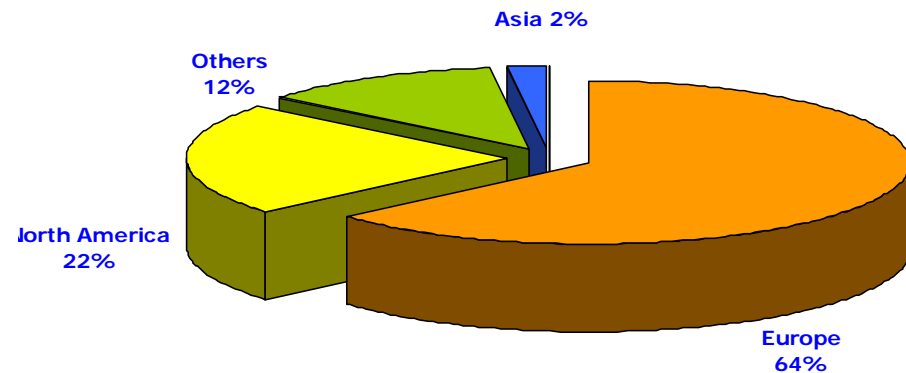
- Headquarters of Eurocopter (EADS), the world's leading manufacturer of helicopters



4 PACA, an attractive area

- PACA: one of the top four regions in France for attracting foreign investment (1st in 1995 and 2000)
- 1500 foreign companies
- 25% of companies have more than 50 employees

Geographical origin



A few big names:

- | | | |
|---------------------|--------------|-----------------------|
| ■ Eurocopter | ■ Atmel | ■ AOL |
| ■ Shell | ■ Gemplus | ■ Galderma R&D |
| ■ Texas Instruments | ■ BP | ■ IBM |
| ■ Amadeus | ■ Haribo | ■ Kerry |
| ■ Lancaster | ■ MacCormick | ■ ST Microelectronics |
| ■ Biotherm | ■ Coca Cola | ■ ... |

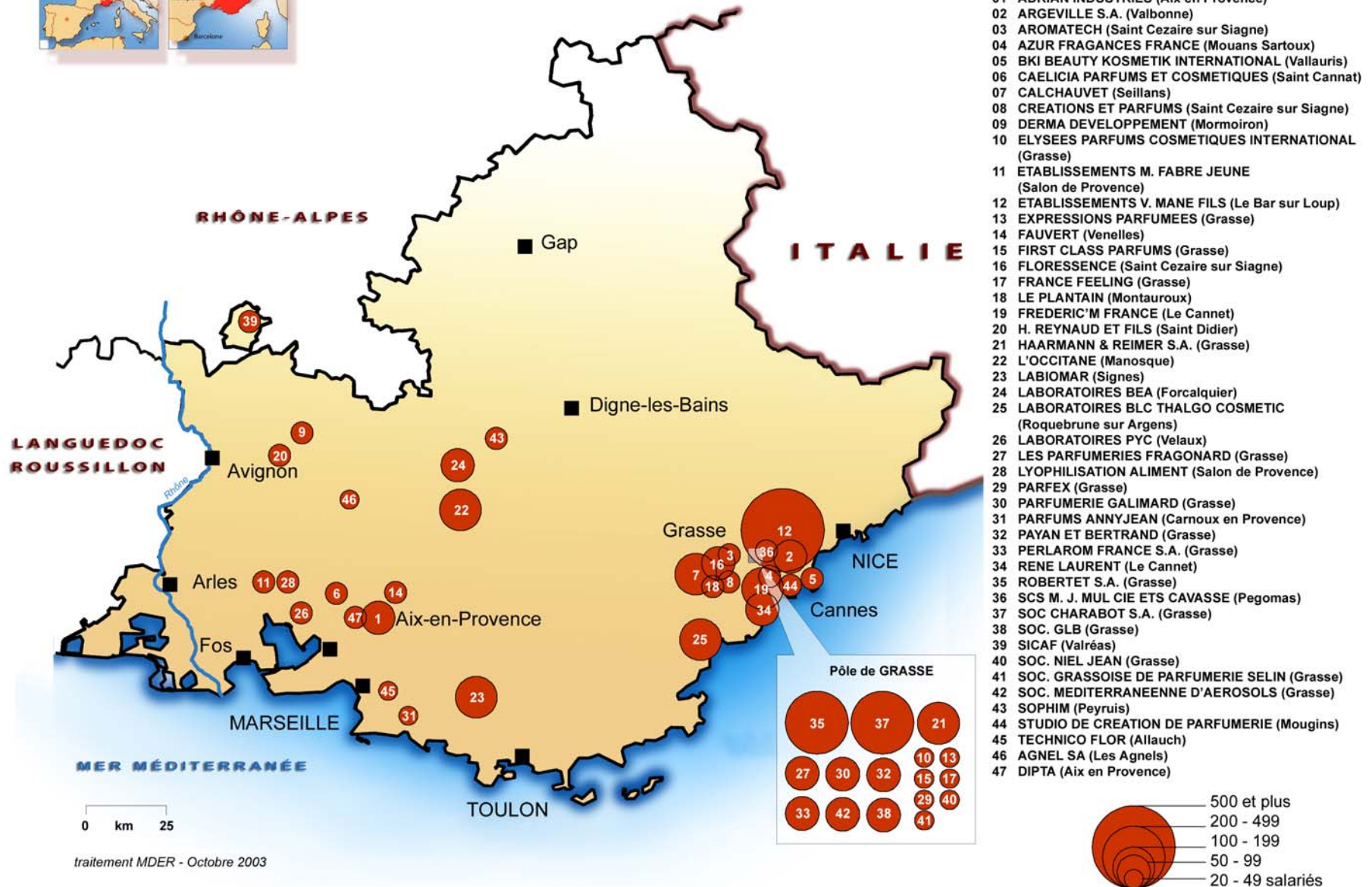
5 PACA, leading region in the design and formulation of perfumes and cosmetic products

More than 350 cosmetics and perfumery companies in PACA
15% of all companies in the sector in France

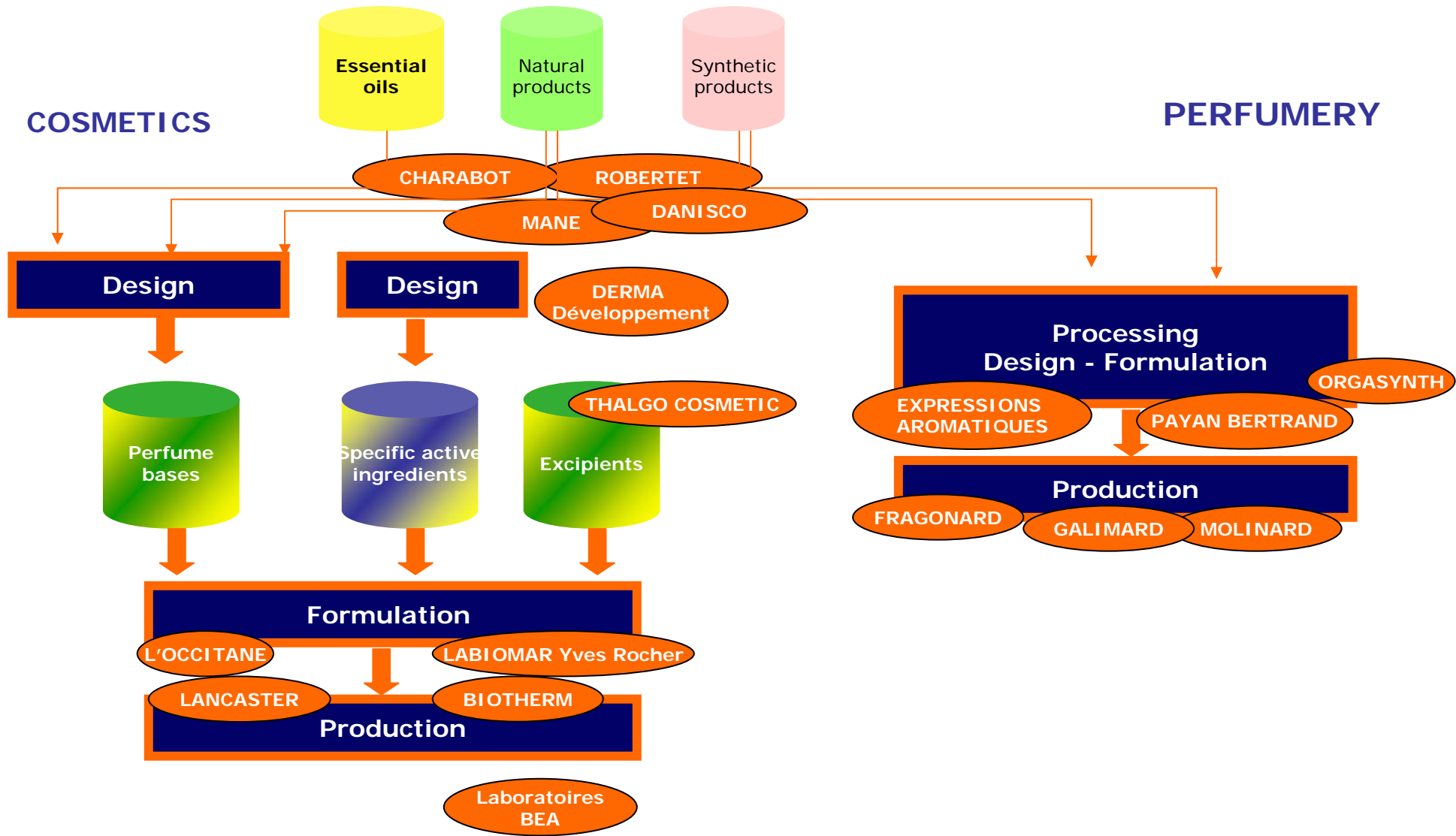
- **France's leading centre for the creation of perfume compositions**
- **The cosmetics and perfumery sector in PACA accounts for:**
 - 25% of all head offices in France
 - 22% of all commercial establishments
 - 10% of jobs
- **Distillation and blending of essential oils:**
 - 96 of the 130 distilleries in France are in PACA
 - 63% of jobs
 - The world's leading area for the production of lavender (70% of production)



Cosmetics industry: businesses with more than 20 employees



7 Presence of the complete skills chain



Examples of perfumes designed in PACA:

- "N°5" - Chanel
- "Eau Sauvage" - Christian Dior
- "Un jardin en Méditerranée" - Hermès
- ...

Examples of innovative products developed recently in PACA:

Area	Company	Product
■ Packaging	AEROVAR	<i>Development of an aerosol that simultaneously sprays 2 products</i>
■ Makeup/tattooing	BIOTIC PHOCEA	<i>Development of pigments for medical and aesthetic tattooing</i>
■ Skincare	DETERLUB	<i>Shaving lotion</i>
■ Marine active ingredients	GELYMA	<i>Seaweed concentrate of several anti-ageing phytohormones</i>
■ Skin repair	KYRN	<i>Development of a product for treating 1st and 2nd degree burns</i>
■ Natural products	L'OCCITANE	<i>Range of bodycare products with helichrysum extracts</i>
■ Marine active ingredients	THALGO COSMETIC	<i>Initial Marine Substance: Seaweed-based anti-wrinkle treatment</i>

9 An international centre for research and education

EDUCATION

- ASFO Grasse – International Perfumery School
 - CCI - Avignon
 - Ecole Jeanne Michaud – Marseilles
 - EGIM – chemistry department
 - Pharmacy Faculty – Galenical Pharmacy
Laboratory - Marseilles
 - Science and Technology Faculty – St Jérôme – Marseilles
 - Science and Technology Faculty – St Jérôme – Marseilles
 - I.U.T. – Avignon
 - Lycée La Forbine – Marseilles
 - University of Nice Sophia Antipolis
 - UFR of Hard and Natural Sciences – Avignon
 - European University of Scent and Flavour
Forcalquier
- Perfumers and designers
 - BP in Beauty and Cosmetics
 - CAP – BEP and BTS in Cosmetics
 - EGIM engineer
 - DEUST in Production and Quality

 - DESS in Chemical Formulation
 - DESS in Applied Fine Chemistry
 - DUT in Packaging Engineering
 - BTS Chemist
 - DESS in Chemistry, formulation, quality and analysis
 - DEA in Molecular synthesis – Doctorate in Chemistry
 - Continuing training and qualifications

Public research laboratories

Research centres	Research field
University of Aix - Marseilles 1	Biotechnologies
	Chemistry of fragrance
	Formulation
	Chemistry of natural products
University of Aix - Marseilles 2	Bacteriological analyses
	Physicochemical analyses
	Formulation
University of Aix - Marseilles 3	Physicochemical analytical specialities
University of Avignon	Analytical chemistry
University of Nice Valrose	Chemistry of fragrance
	Physicochemical analyses
	LASI (Laboratory of Fragrance, Synthesis and Interactions)
	Formulation
University of Toulon Var	Formulation

Private R&D laboratories

- **ARKOPHARMA** – Carros (Alpes-Maritimes) – Natural cosmetic products
- **BEA** – Forcalquier (Alpes de Haute-Provence) – Cosmetic products
- **DERMA Développement** – Mormoiron (Vaucluse) - Cosmetic formulation
- **DIPTA** – Aix en Provence (Bouches-du-Rhône) – Formulation, cosmetics and perfumery
- **GELYMA** – Marseilles (Bouches-du-Rhône) – Marine active substances
- **KYRN** – Nice (Alpes-Maritimes) – Design of natural products
- **SOPHIM** – Peyruis – (Alpes de Haute-Provence) – Production of squalane for cosmetics
- **VINCIENCE** – Sophia Antipolis (Alpes-Maritimes) – Organic additives

Service providers

Research laboratories	Research field
ALBHADES – Oraison – Alpes du Haute-Provence	Analysis, control and quality
ANALYTIKA – Cuers - Var	Physicochemical analyses
ARKOPHARMA – Carros - Alpes-Maritimes	Extraction
ATS – Aix les Milles - Bouches-du-Rhône	Physicochemical analysis - skin tests and assessments
AVEPHARM - Peyruis - Alpes de Haute-Provence	Bacteriological analyses
BIOENVIRONTECH – Marseilles - Bouches-du-Rhône	Physicochemical analyses - tests
CATALYSE – Marseilles – Bouches-du-Rhône	Analysis, control and quality
CERVAC – Aix en Provence - Bouches-du-Rhône	Analysis, control and quality
CONTRAL – Peyruis - Alpes du Haute-Provence	Bacteriological analysis
COGEX – Fos sur Mer – Bouches-du-Rhône	Analysis, control and quality
CPCAD – Nice - Alpes-Maritimes	Skin tests and assessments
GERME - Marseilles	Bacteriological analysis
KEYBIO – Aubagne - Bouches-du-Rhône	Bacteriological analyses
Usine de la Mesta – Gilette – Alpes-Maritimes	Synthesis
ORGASYNTH – Grasse - Alpes-Maritimes	Synthesis
SAI – Marseilles	Physicochemical and bacteriological analysis
SAMABIOL – l'Isle sur Sorgue - Vaucluse	Analysis, control and quality
SDS – Peypin - Bouches-du-Rhône	Research, analysis, control and quality
SKINE ETHIC – Nice - Alpes-Maritimes	In vitro tests

10 A community working together

Professional associations of companies and laboratories give the sector impetus.

- **COSMED** - Mediterranean Cosmetics Association
 - **150 members:** operators, workers, packagers, raw materials suppliers, service providers, schools and universities
 - **Aim:** to encourage the development and expansion of member companies through joint actions (conferences, meetings, commercial initiatives, regulatory monitoring, etc.).
 - **Relations with AFSSA** (French Association for Health and Food Safety)
 - **Contact:** www.cosmed.fr

- **PRODAROM** – National Union of Manufacturers of Aromatic Products
 - **60 members:** producers, processors and sellers of natural extracts or synthetic components, creators and sellers of perfume compositions for luxury perfumed spirits, cosmetics, soaps, detergents, household products, etc.).
 - **Aim:** promotion and defence of the interests of its members
 - **Contacts:** www.prodarom.fr

- **UIC PACA** – Union of Chemical Industries in Provence-Alpes-Côte d'Azur
 - **120 members:** basic and fine chemistry
 - **Aim:** Promotion and development of the profession and defence of the interests of its members
 - **Contact:** jurid-techn@urip-chim-plast.asso.fr

11 A region that enhances its own image

Companies in the cosmetics/perfumes sector share in the reputation of regional areas ('Provence', 'Côte d'Azur', 'Grasse, capital of the perfumery industry', etc.), which they can use to enhance the image of their own products.

For example:

- **L'Occitane en Provence** – philosophy: *"to revive the colours, scents and traditions of Provence in its skincare, beauty and household products"*.
- **Comptoir provençal des argiles** – Cosmetic products based on clay and essential oils
- **Savonnerie des allées de Provence**
- **Savonnerie de Haute Provence**
- **Terre d'Oc**
- **Azur Fragrances**
- **Savonnerie de Bormes**

Events with an international reputation

- **LUXE PACK - Monaco**
Trade fair of packaging for luxury products
- **Centifolia - Grasse**
- **Les Journées Internationales des Huiles Essentielles - Digne**
- **World Perfume Congress – Cannes**
- **Symposium International d'aromathérapie et plantes médicinales - Grasse**

12 Teams of specialists to support your project

Teams of specialists are available to make relocating to PACA as smooth as possible.

These project management professionals offer:

- **Information on the economic fabric and environment of the region in your business sector.**
- **Research into the best relocation package to suit your specifications (property – land, accessibility, subcontractors, etc.)**
- **Introduction to key local agencies**
- **Mobilisation and management of any assistance for which your project is eligible (financial assistance, tax relief, recruitment and training support, research and innovation assistance, etc.)**
- **Support for your relocation from preparation for decision-making right through to your next development...**

13 Contacts



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