

Photonics

France



Analysis of the production of photonics manufacturing and services to the photonics industry on the national territory

June - 2020

Mapping of the French photonics industry

Perimeter of the base



The database includes companies that :

- Manufacture photonic components, industrial equipment for the manufacture of these components, modules and photonic systems,
- Manufacture complete systems fulfilling functions based on photonics (detection, imaging, lighting, machining, etc.).
- Providing services related to the development of the photonics industry (design office, engineering, modelling and software, tertiary functions)
- Distributing photonic components and systems for regional markets (France, French speaking, EMEA, Europe)



The database does not include :

- Integrators who develop non-photonic systems (automotive, household appliances) even if they integrate photonic subsystems (automotive headlight, LEDs for baking ovens)
- The research centres have no commercial activity (contracts) and no labour force.

Mapping of the French photonics industry

2018 figures



1 051 companies



773
industrial



115
services and
software publishers



163
foreign Repr. and
distributors

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73 000 jobs

On the territory

Jobs in university research are not mainstreamed



Of which
83.6% in the
manufacturing
branch

18,59
Billions
of euros



Of which €14.71bn in
the manufacturing
branch



Performance of the French photonics industry

A remarkable evolution between 2013 and 2018

Turnover : + 40 %

(6 times more important than the growth of manufacturing industry)

Agile but not fragile

Job : + 12%

(weak employment growth in all other industries)

**Number of industrial companies :
+ 4,5 % of annual growth**

World Market
(Photonics21 figures)

2005 : 228 billions €

2015 : 447 billions €

2020 : 615 billions €

+38% between 2015 and 2020

Detailed analysis of the French sector

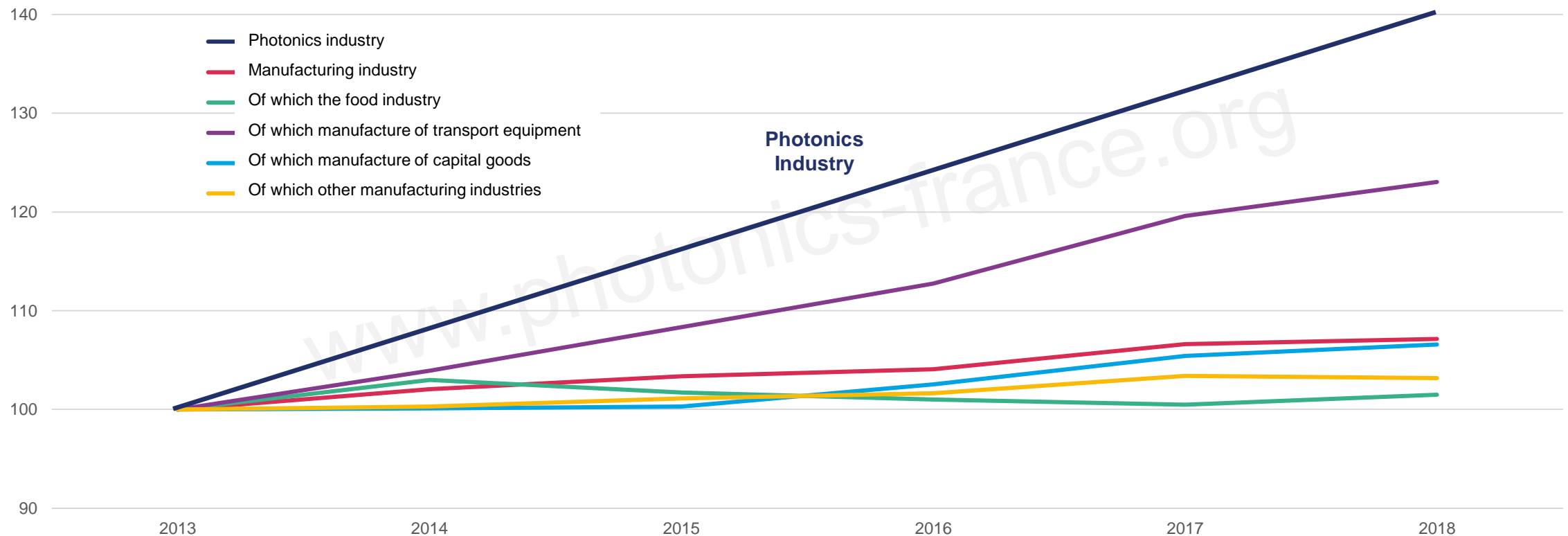
Summary

1. **Evolution 2013 – 2018**
 - Evolution of growth
 - Employment trends
 - Trends in business start-ups
 - Changes in companies size
2. **The markets in figures**

Advantages of the French photonics sector

Growth in value well in excess of domestic industry growth

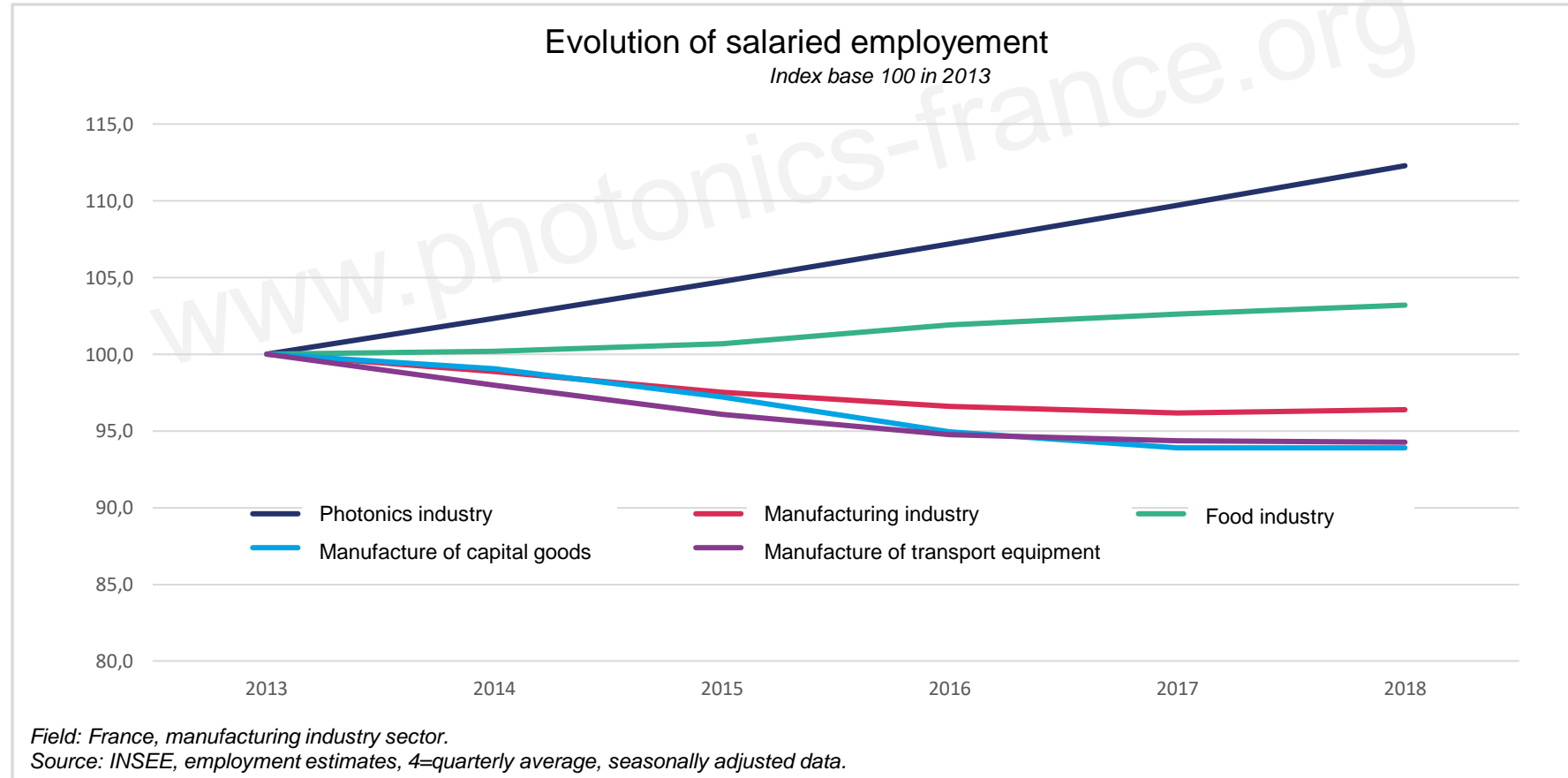
The 40.4 point growth in the photonics sector between 2013 and 2018 represents almost 6 times the growth in French manufacturing industry (7.12 points between 2013 and 2018) and almost 2 times the growth in freight transport (23 points between 2013 and 2018).



Advantages of the French photonics sector

Growth that creates jobs

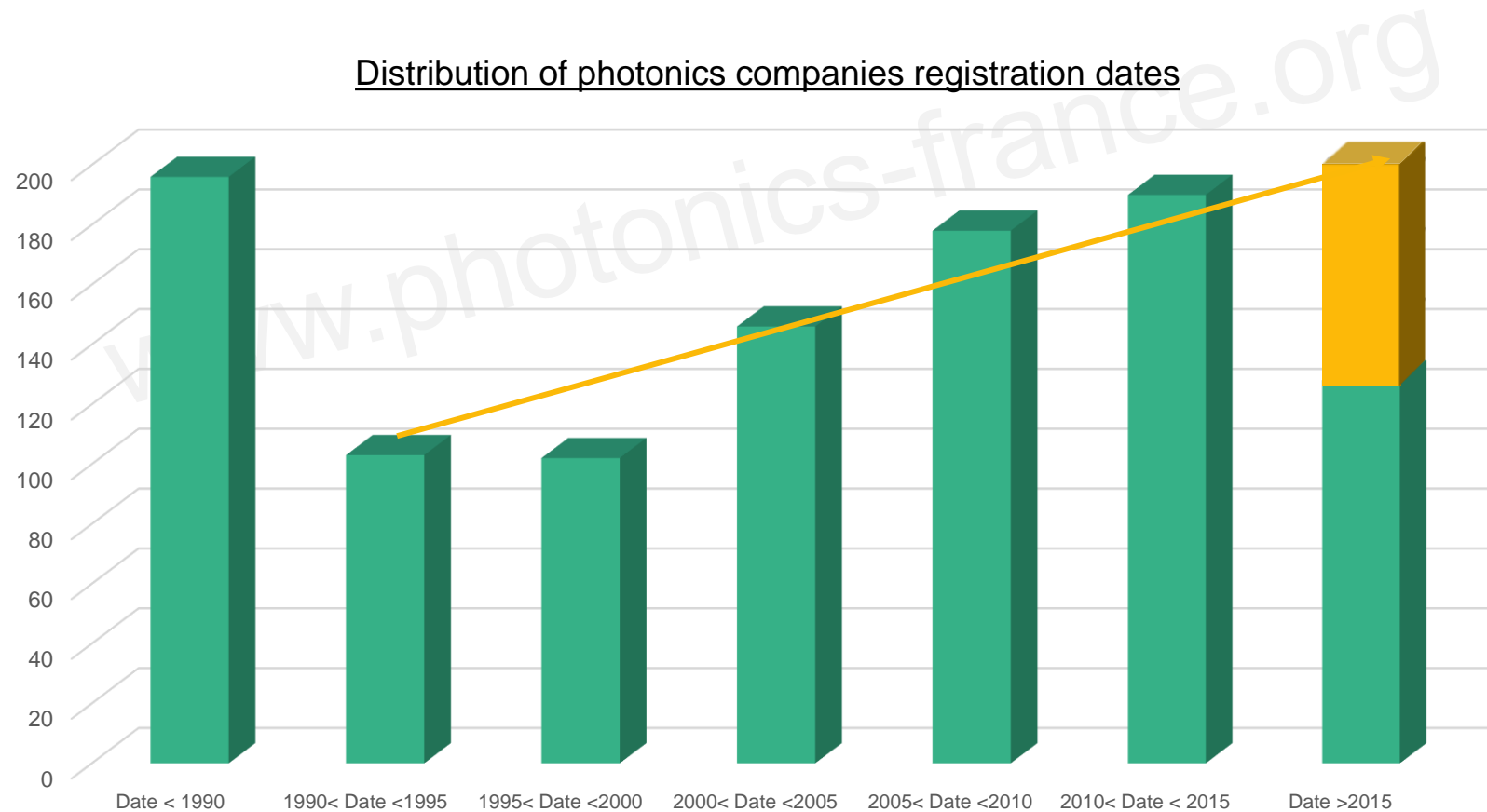
12.3 percentage points of labour force growth between 2013 and 2018 (65,000 to 73,000) compared to zero employment growth in all industries.



Advantages of the French photonics sector

Dynamic business demographics

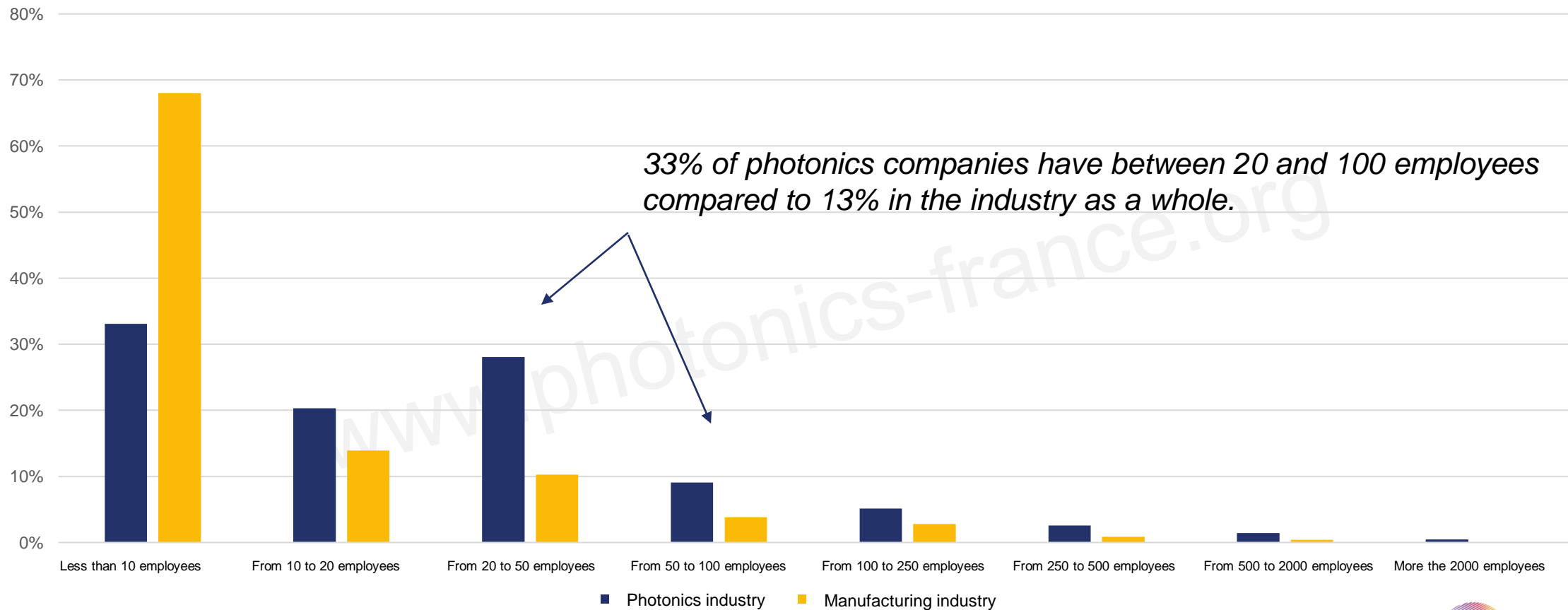
The latest data is for the three-year period from 2016 to 2018.
A forecast covering the entire period (2019 and 2020) is highlighted in yellow..



Advantages of the French photonics sector














Agile but not fragile companies

Distribution of industrial employment - 2018



The strengths of the French photonics industry

Driving markets and a "photonic core".

SEGMENTS	Turnover (€)	Turnover/staff (€)	Staff
Photonics (basic components and materials)	2 524 549 000	215 000	11 741
 Mobility: automotive, maritime, railway, aeronautics	638 697 000	205 000	3 121
 The factory of the future	496 604 000	164 000	3 033
 Environment and energy (including lighting/building)	2 025 276 000	228 000	8 874
 Agriculture and food	43 511 000	118 000	370
 Health and well-being	3 315 696 000	286 000	11 597
 Telecommunication and quantum information	1 890 267 000	378 000	5 000
 Defence and Security	2 492 765 000	247 000	10 072
 Large Instruments and Space	430 429 000	243 000	1 769
 Professionals and consumers	254 518 000	139 000	1 906
 Optical Instrumentation and Measurements	415 665 000	192 000	2 159
 Services	459 758 000	130 000	3 534
 Distributors	3 509 903 000	385 000	9 120
 Software	86 041 000	113 000	758



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