

P(14)9084:1



*2014 Cogeca report
on developments
in EU agri-cooperatives*

Cogeca | Brussels, 5th February 2015

Methodological considerations

Member organisations from 19 MS (FI, DE, RO, PT, EL, AT, SE, FR, IT, SI, ES, CZ, HR, IE, NL, LT, EE, LU and BE) responded to the Secretariat's questionnaire.

Information on the remaining countries was collected, from the EC study on POs and agri-cooperatives in the EU, and DG AGRI and EUROSTAT.

General Data on Agri-Cooperatives in the EU

EU Member State	Total number of Cooperatives	Total number of Members ¹	Turnover (m€)
Belgium	301	:	3 257
Bulgaria	900	:	:
Czech Republic	548	524	1 327
Denmark	28	45 710	25 009
Germany	2 400	1 440 600	67 502
Estonia	21	2 036	512
Ireland	75	201 684	14 149
Greece	550	:	711
Spain	3 844	1 179 323	25 696
France	2400	858 000	84 350
Croatia	613	10 734	167
Italy	5 834	863 323	34 362
Cyprus	14	24 917	62
Latvia	49	:	1 111
Lithuania	402	12 900	714
Luxembourg	55	:	:
Hungary	1 116	31 544	1 058
Malta	18	1 815	204
Netherlands ¹	215	140 000	32 000
Austria	217	306 300	8 475
Poland	136	:	15 311
Portugal	735	:	2 437
Romania	68	:	204
Slovenia	368	16 539	705
Slovakia	597	:	1 151
Finland	35	170 776	13 225
Sweden	30	160 350	7 438
United Kingdom	200	138 021	6 207

Main findings

The total turnover has remained stable at €347 billion (close to €360 billion)

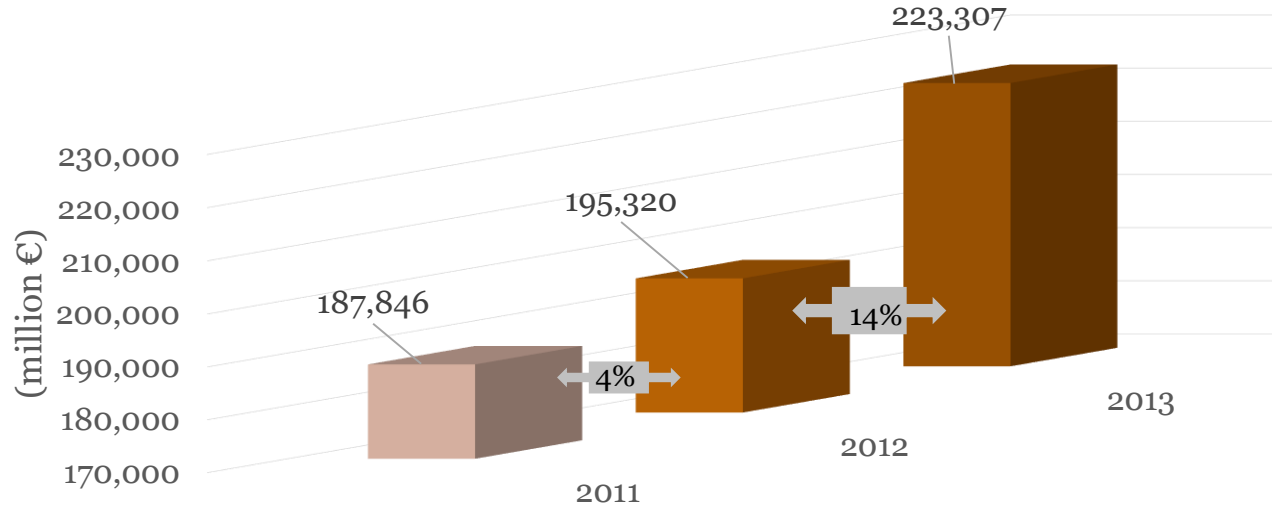
The total number of cooperatives has decreased to some 21769*

- ***not including 11500 CUMAs**
- ***6000 less Greek cooperatives, due to legal reform**

Evolution of TOP 100

Significant growth by leading cooperatives

Evolution of TOP 100 EU Agri-Cooperatives By total turnover 2003-2013



Evolution of TOP 100
Significant growth by leading cooperatives

**The total turnover of the TOP 100
cooperatives has grown by:**

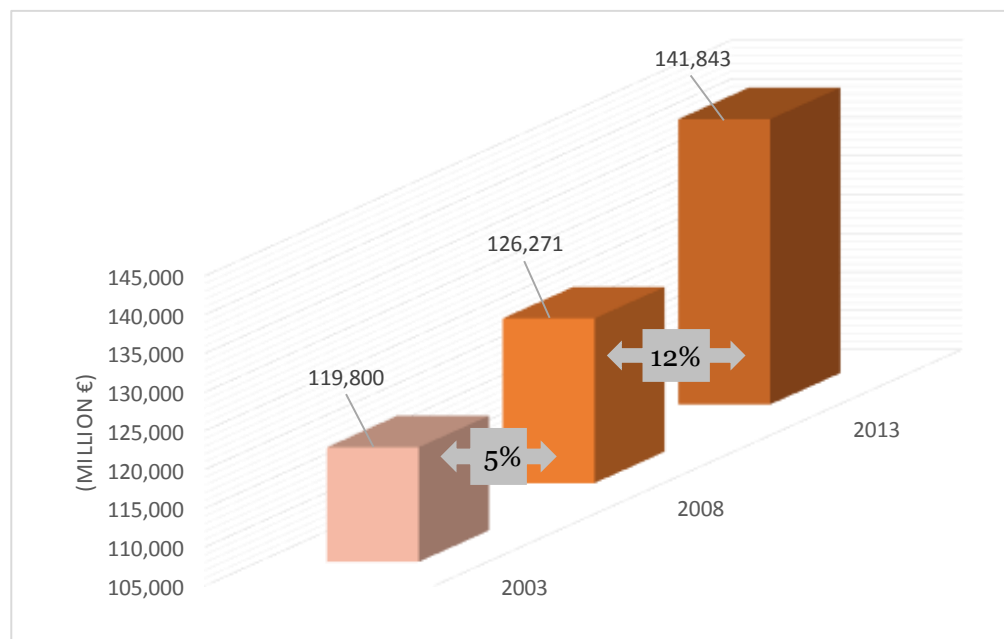
4% in 2011 – 2012

14% in 2012 - 2013

Evolution of TOP 25

Significant growth by leading cooperatives

Evolution of TOP 25 EU Agri-Cooperatives By total turnover 2003-2013



Evolution of TOP 25
Significant growth by leading cooperatives

**The total turnover of the TOP 25
cooperatives has grown by:**

5% in 2003 - 2008

12% in 2008 - 2013

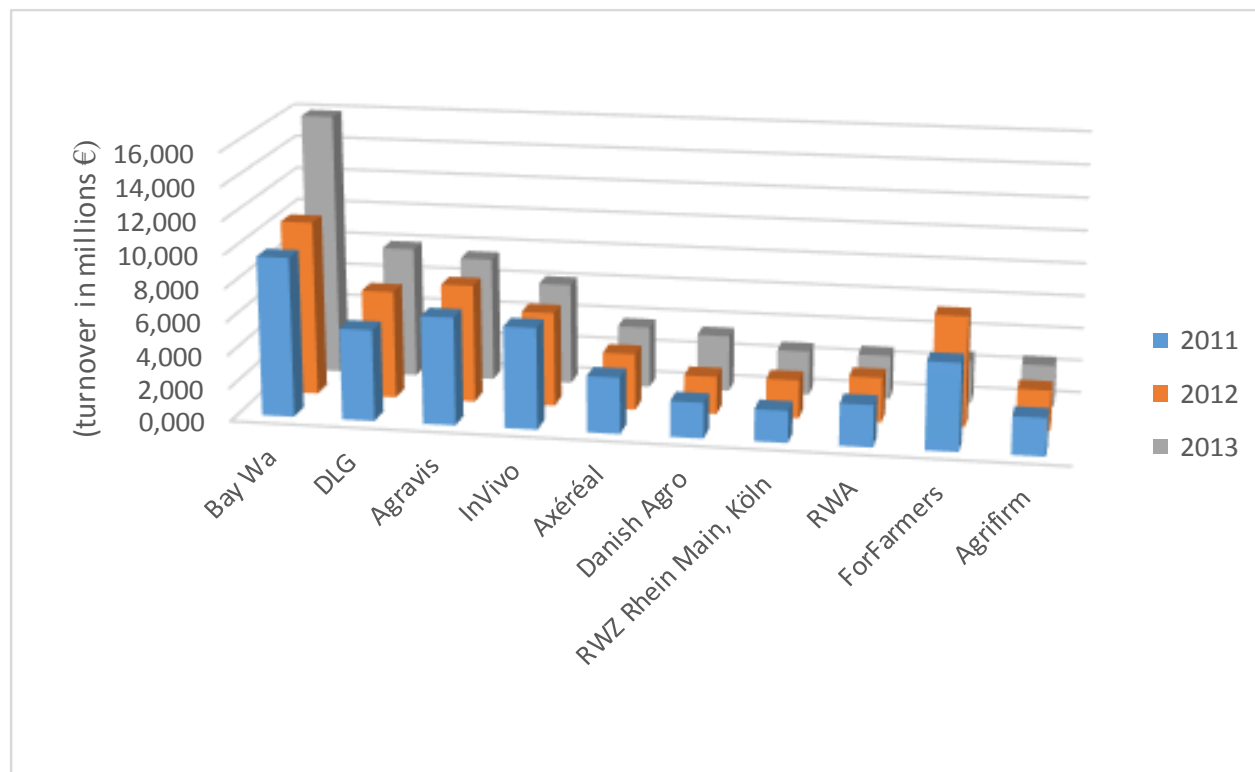
EU Top 10 Farm Supply Cooperatives

by turnover (m€)

N°	Cooperative	Country	2011	2012	2013
1	Bay Wa	DE	9 586	10 531	15 957
2	DLG	DK	5 494	6 510	7 939
3	Agravis	DE	6 468	7 108	7 504
4	InVivo	FR	6 083	5 669	6 138
5	Axérial	FR	3 375	3 400	3 707
6	Danish Agro	DK	2 130	2 263	3 400
7	RWZ Rhein Main, Köln	DE	1 910	2 298	2 683
8	RWA	AT	2 513	2 696	2 657
9	ForFarmers	NL	5 224	6 620	2 625
10	Agrifirm	NL	2 272	2 436	2 532

EU Top 10 Farm Supply Cooperatives

by turnover (m€)



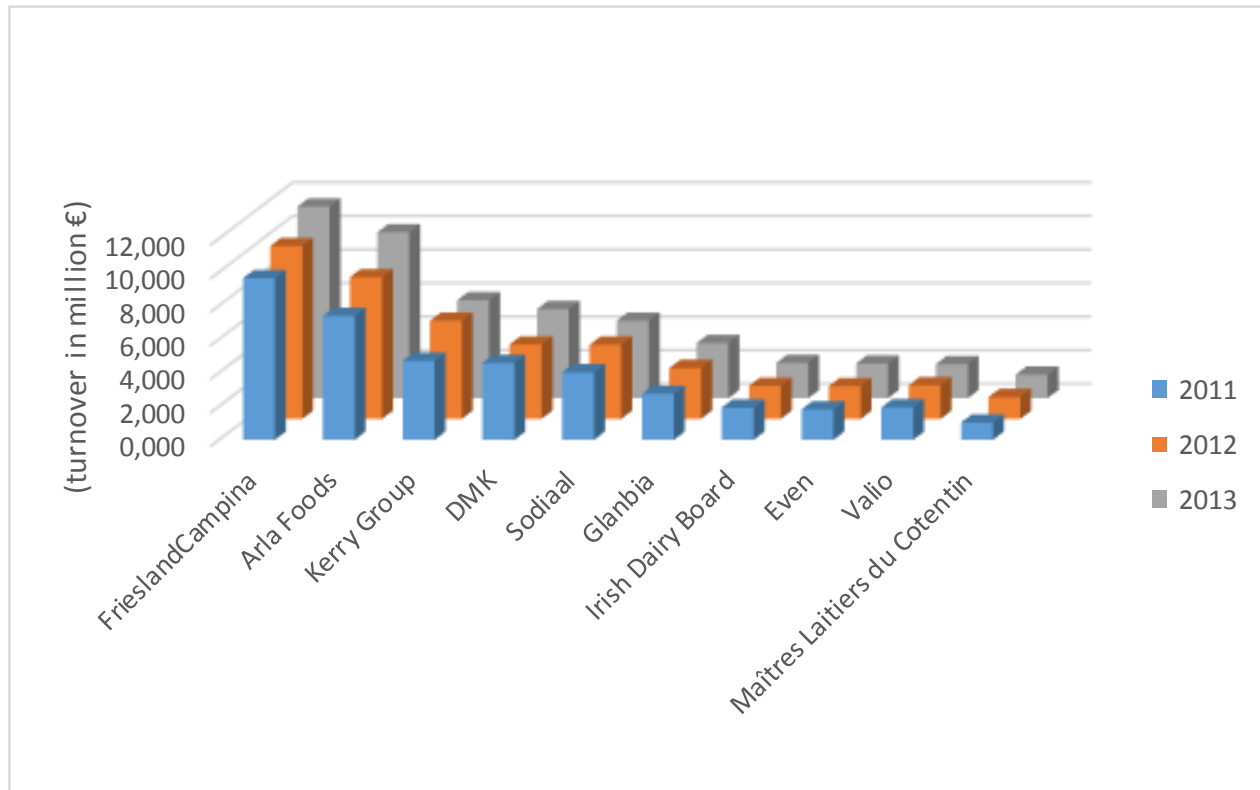
EU Top 10 Dairy Cooperatives

by turnover (m€)

N°	Cooperative	Country	2011	2012	2013
1	FrieslandCampina	NL	9 626	10 309	11 418
2	Arla Foods	DK	7 384	8 450	9 887
3	Kerry Group	IE	4 700	5 848	5 836
4	DMK	DE	4 575	4 438	5 310
5	Sodiaal	FR	4 021	4 421	4 616
6	Glanbia	IE	2 735	3 038	3 282
7	Irish Dairy Board	IE	1 905	1 977	2 100
8	Even	FR	1 800	1 958	2 060
9	Valio	FI	1 929	1 999	2 029
10	Maîtres Laitiers du Cotentin	FR	1 028	1 305	1 400

EU Top 10 Dairy Cooperatives

by turnover (m€)



EU Top 10 Meat Cooperatives

by turnover (m€)

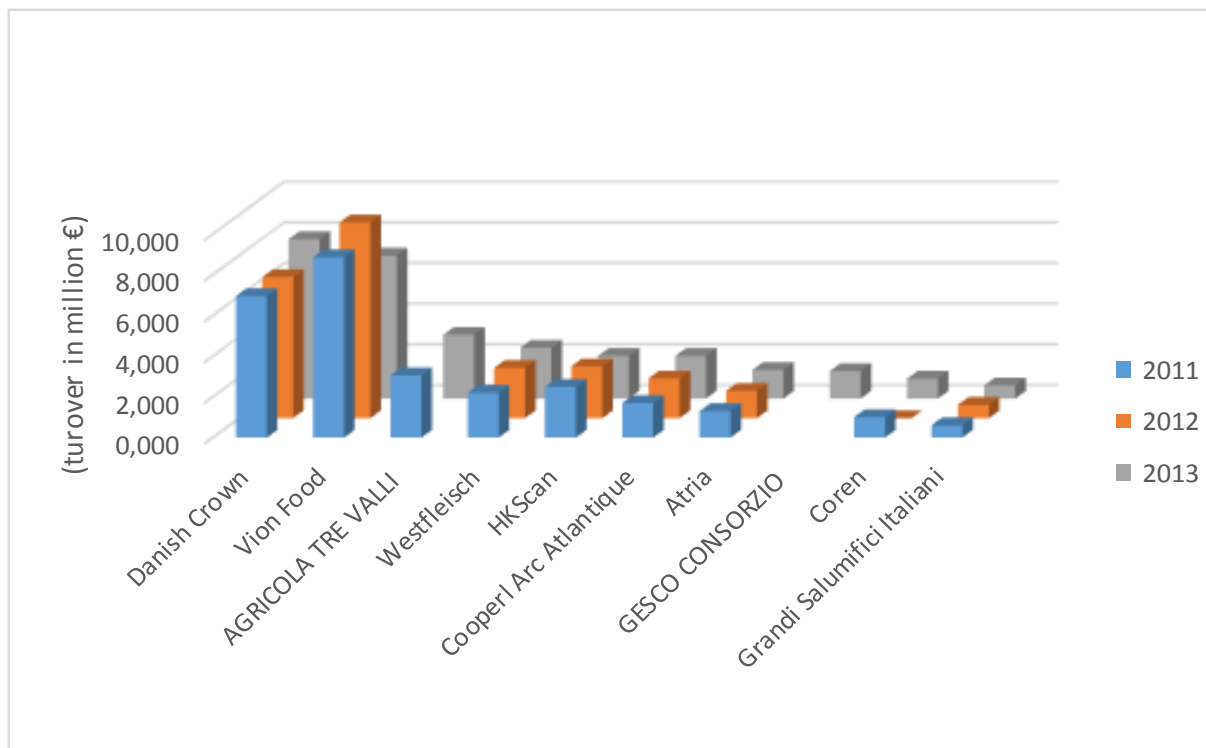
N°	Cooperative	Country	2011	2012	2013
1	Danish Crown	DK	6 954	6 940	7 844
2	Vion Food ¹	NL	8 870	9 620	7 033
3	Agricola Tre Valli SCA ²	IT	3 056	:	3 135
4	Westfleisch	DE	2 207	2 475	2 507
5	HKScan	FI	2 491	2 546	2 100
6	Cooperl Arc Atlantique	FR	1 700	1 952	2 100
7	Atria	FI	1 302	1 343	1 411
8	Gesco Consorzio Cooperativo SCA ³	IT	:	:	1 352
9	Coren	ES	1 005	:	982
10	Grandi Salumifici Italiani	IT	605	652	675

¹ Not a cooperative legal form, but farmer owned and controlled.

^{2,3} Società Cooperativa Agricola

EU Top 10 Meat Cooperatives

by turnover (m€)

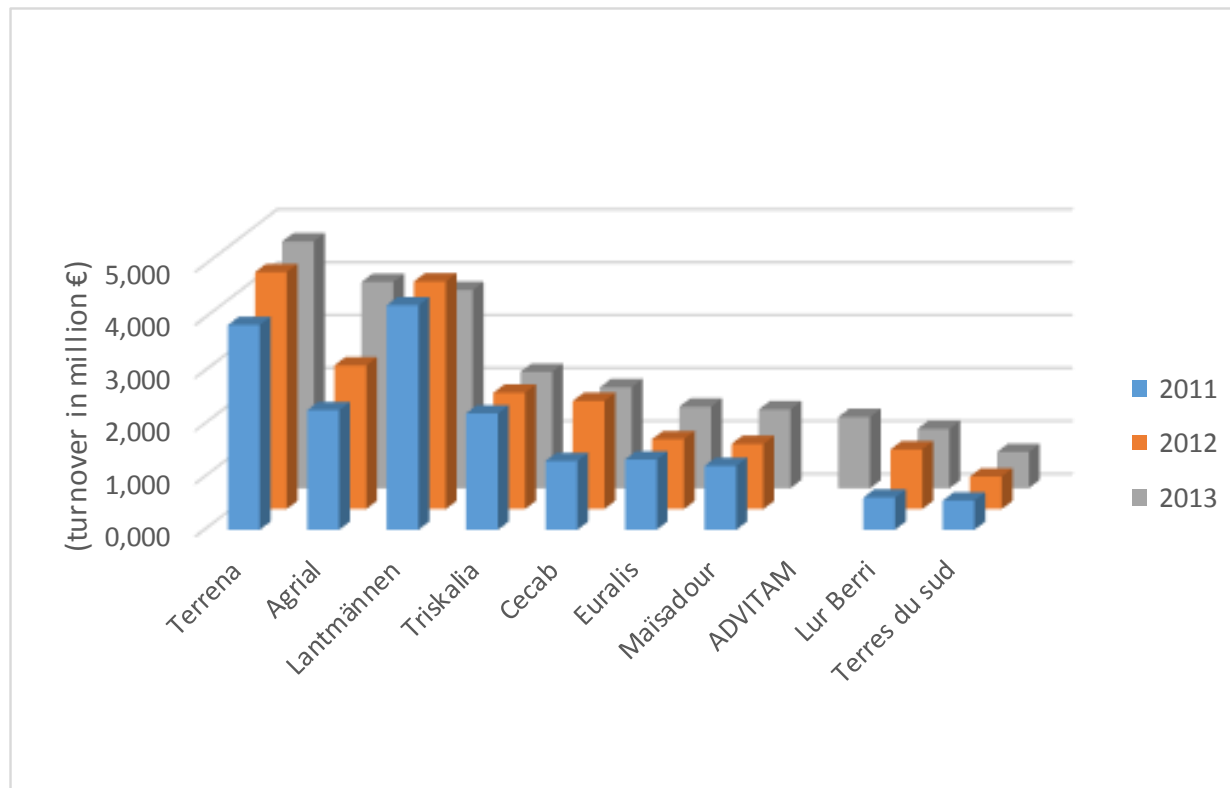


EU Top 10 Multipurpose Cooperatives

by turnover (m€)

N°	Cooperative	Country	2011	2012	2013
1	Terrena	FR	3 871	4 478	4 667
2	Agrial	FR	2 261	2 715	3 901
3	Lantmännen	SE	4 244	4 302	3 750
4	Triskalia	FR	2 200	2 200	2 200
5	Cecab	FR	1 300	2 044	1 910
6	Euralis	FR	1 326	1 321	1 544
7	Maïsadour	FR	1 206	1 230	1 491
8	ADVITAM	FR	:	:	1 349
9	Lur Berri	FR	610	1 128	1 125
10	Terres du sud	FR	553	616	685

EU Top 10 Multipurpose Cooperatives by turnover (m€)

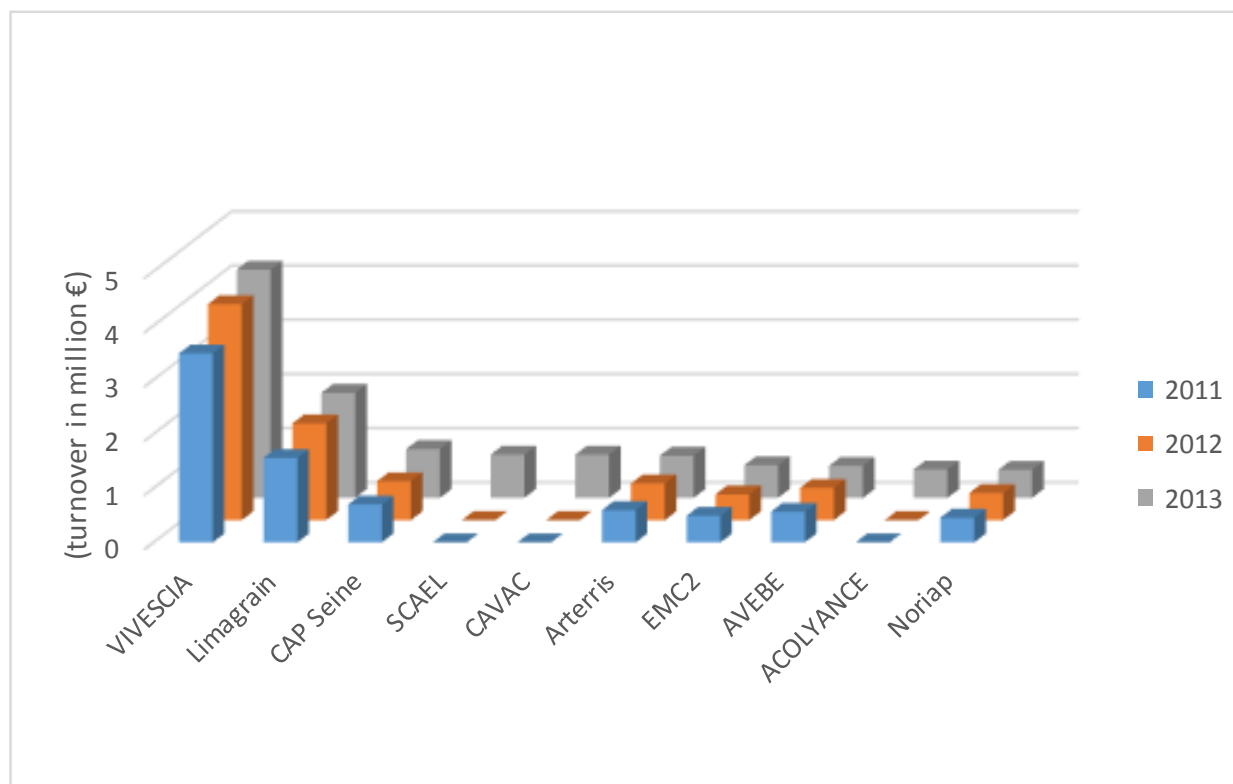


EU Top 10 Cereals Supply Cooperatives

by turnover (m€)

N°	Cooperative	Country	2011	2012	2013
1	VIVESCIA	FR	3 483	3 983	4 209
2	Limagrain	FR	1 555	1 784	1 938
3	CAP Seine	FR	698	716	9
4	SCAEL	FR	:	:	798
5	CAVAC	FR	:	:	798
6	Arterris	FR	594	678	778
7	EMC2	FR	491	474	602
8	AVEBE	NL	565	595	591
9	ACOLYANCE	FR	:	:	525
10	Noriap	FR	455	499	518

EU Top 10 Cereals Supply Cooperatives by turnover (m€)



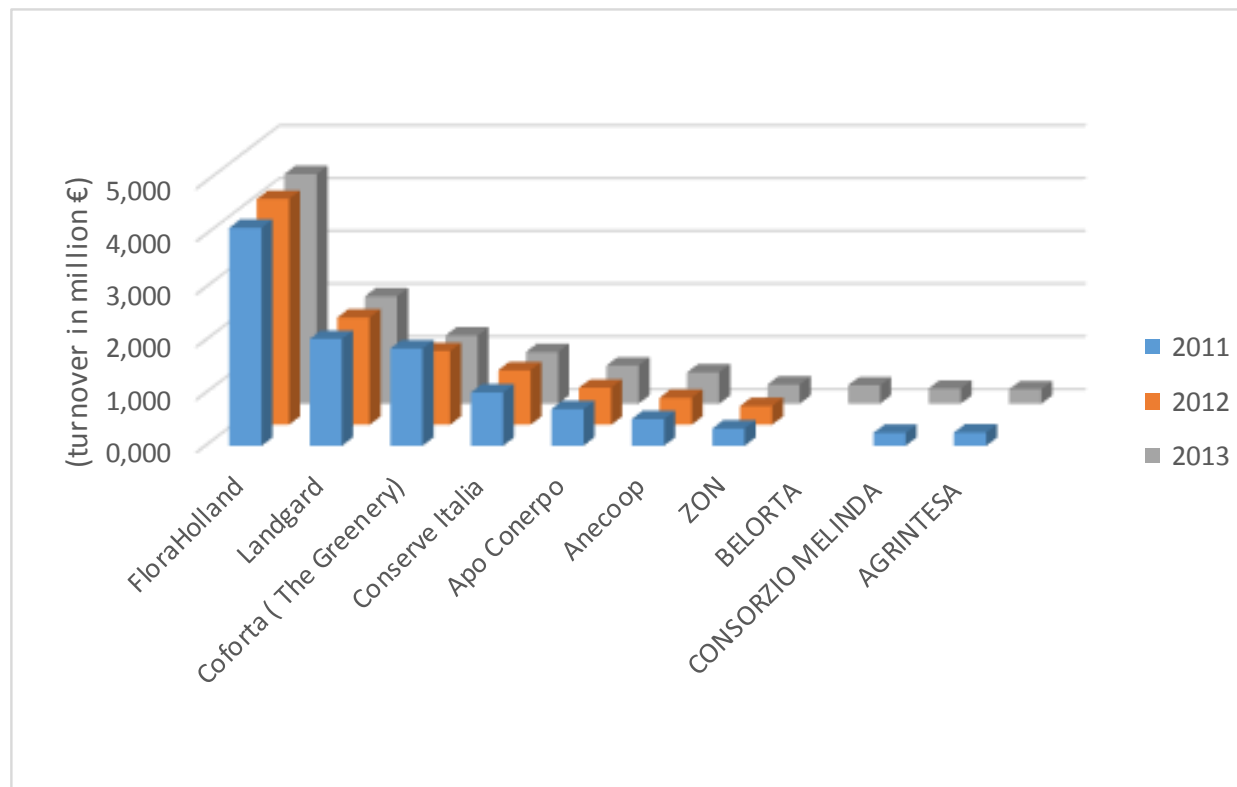
EU Top 10 Horticulture Cooperatives

by turnover (m€)

N°	Cooperative	Country	2011	2012	2013
1	FloraHolland	NL	4 130	4 281	4 350
2	Landgard	DE	2 024	2 033	2 035
3	Coforta (The Greenery)	NL	1 843	1 397	1 293
4	Conserve Italia	IT	1 009	1 033	980
5	Apo Conerpo	IT	696	702	723
6	Anecoop	ES	506	508	593
7	ZON fruit & vegetables	NL	326	353	362
8	BELORTA	BE	:	:	350
9	CONSORZIO MELINDA	IT	244	:	286
10	AGRINTESA	IT	250	:	274

EU Top 10 Horticulture Cooperatives

by turnover (m€)



EU Top 10 Wine Cooperatives

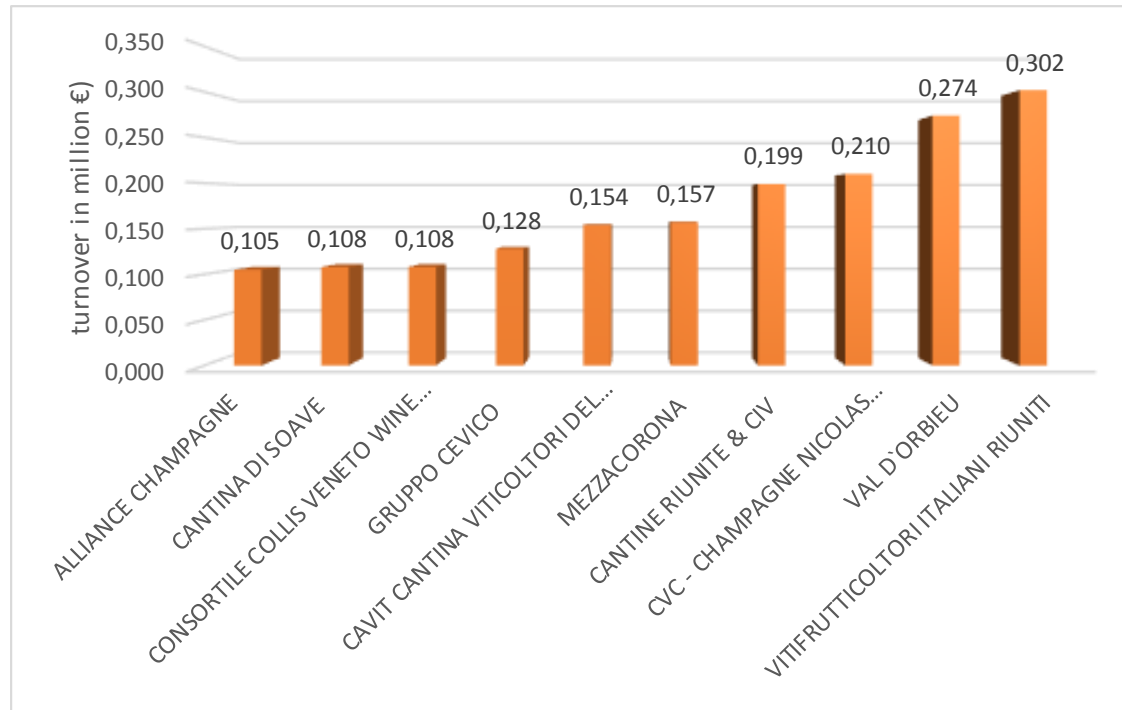
by turnover in 2013 (m€)

N°	Cooperative	Country	2013
1	Cooperative Agricole Vitifruttilcoltori Italiani Riuniti Organizzati	IT	302
2	Val D' Orbieu	FR	274
3	CVC - Champagne Nicolas Feuillatte	FR	210
4	Cantine Riunite & Civ - SCA ²	IT	199
5	Mezzacorona Societa' Cooperativa Agricola	IT	157
6	Cavit Cantina Viticoltori Consorzio Cantine Sociali Del Trentino	IT	154
7	Gruppo Cevico - Centro Vinicolo Cooperativo Romagnolo	IT	128
8	SCA ¹ Consortile Collis Veneto Wine Group	IT	108
9	Cantina Sociale Cooperativa Di Soave	IT	108
10	Alliance Champagne	FR	105

^{1, 2} Societa' Cooperativa Agricola

EU Top 10 Wine Cooperatives

by turnover in 2013 (m€)



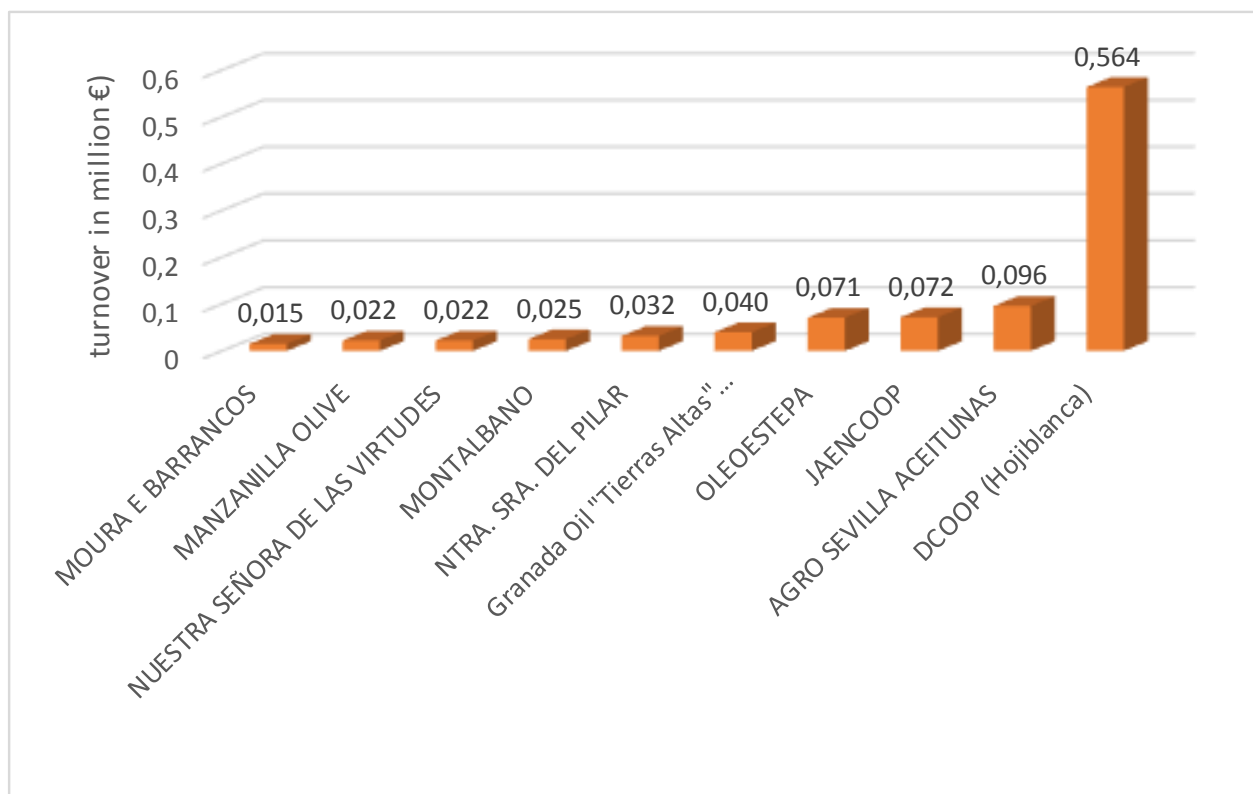
EU Top 10 Olive Oil & Olive Cooperatives

by turnover (m€)

N°	Cooperative	Country	2013
1	Dcoop (Hojiblanca)	ES	564
2	Agro Sevilla Aceitunas	ES	96
3	Jaencoop	ES	72
4	Oleoestepa	ES	71
5	Granada Oil "Tierras Altas" (Highlands)	ES	40
6	Ntra. Sra. Del Pilar	ES	32
7	Montalbano	IT	25
8	Manzanilla Olive	ES	22
9	Nuestra Señora De Las Virtudes	ES	22
10	Moura E Barrancos – Cooperativa Agrícola, Crl	PT	15

EU Top 10 Olive Oil & Olive Cooperatives

by turnover in 2013 (m€)



THANK YOU

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