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Ref. Ares(2020)2932028 - 06/06/2020

Main socio-economic figures of the Spanish agri-food cooperatives

Socioeconomic Observatory of the Spanish Agrifood Cooperatives (**SOSAC 2017)**

-Cooperativas Agro-alimentarias de España-

Supported by MAPAMA

-Spanish Ministry of Agriculture and Fisheries, Food and Environment-

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cooperativas agro-alimentarias España

1. Introduction

The data presented in this report come from the following sources:

> ***"Directory of Cooperatives"*** survey: annual survey collecting the main socio-economic figures from, at least, cooperatives linked to our organisation. Data were collected from **2.682 cooperatives in 2017** (corresponding to the 2016 annual accounts).

> **Indirect sources for** Canary Islands and La Rioja.

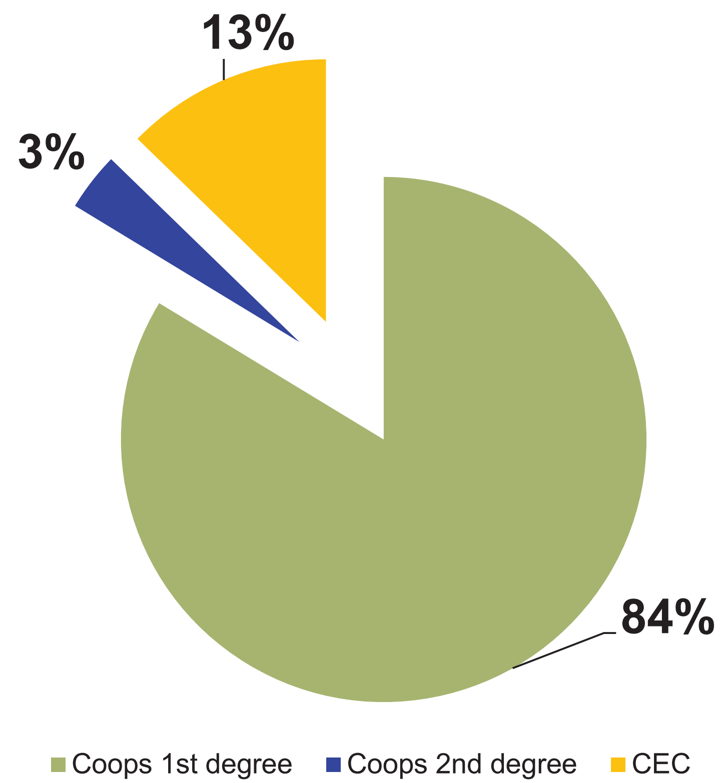
> **Ministry of Agriculture and Fisheries, Food and Environment (MAPAMA)** and **Ministry of Employment and Social Security (MEYSS)** statistics.

2. The Spanish agri-food cooperatives: number, type and trends

2.1. Number and types

	No. Entities*
Agricultural Cooperatives	3.264
CEC[1]	476
TOTAL	**3.740**

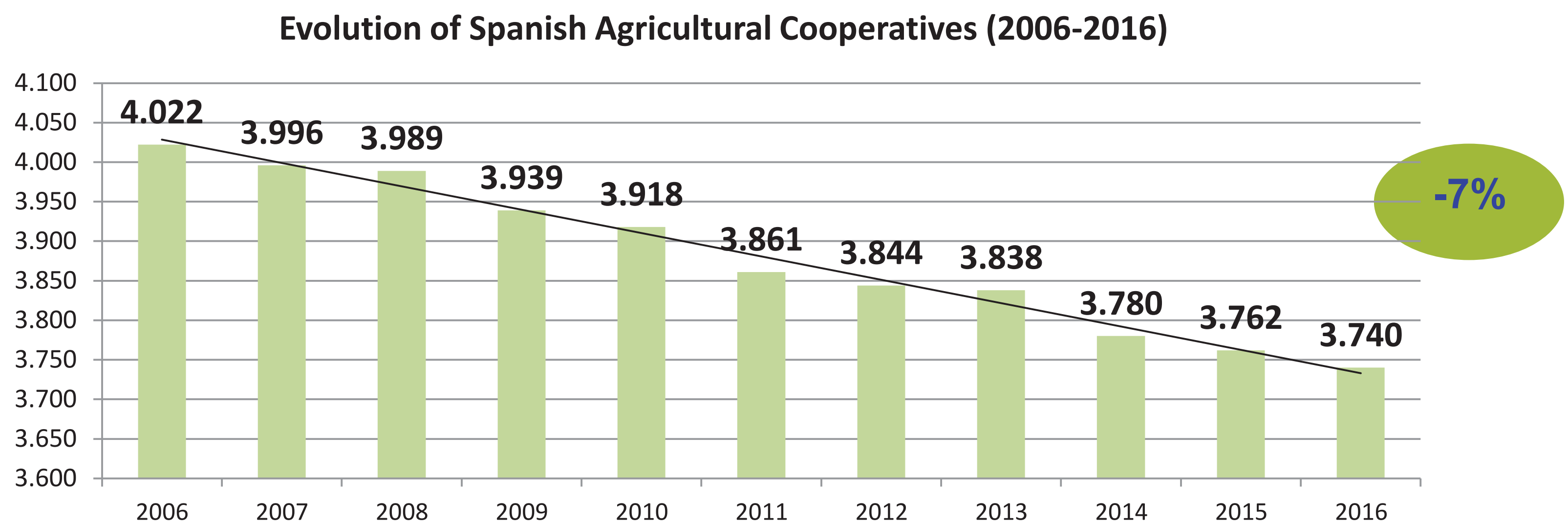
[1]Farm cooperatives *(CEC=Cooperativas de Explotación Comunitaria de la Tierra)*



* Source: Cooperatives (agri-food and CEC) with employees registered in Social Security in 2016 (MEYSS).

2.2. Number of cooperatives. Evolution

Slight decreasing trend (2006-2016)



Decrease [2006/16] **-7%** **(-10,6% only agri-food cooperatives without CEC)**

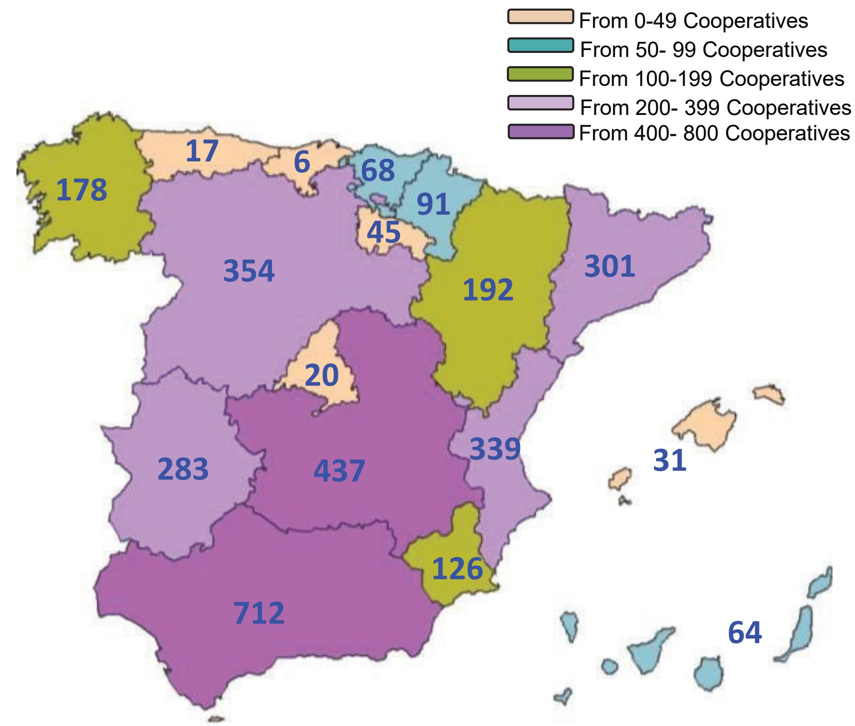
Decrease [2015/16] **-0,6%** **(-0,9% ony agri-food cooperatives without CEC)**

* Source: Cooperatives (agri-food and CEC) with employees registered in Social Security in 2016 (MEYSS).

2.3. Geographical distribution (I)- No. cooperatives

Regions with the largest number of cooperatives

		Agricultural Cooperatives		
	Region	No.	%	
1	ANDALUSIA	712	21,81%	74%
2	CASTILE-LA MANCHA	437	13,39%	
3	CASTILE-LEÓN	354	10,85%	
4	VALENCIAN C.	339	10,39%	
5	CATALONIA	301	9,22%	
6	EXTREMADURA	283	8,67%	
7	ARAGON	192	5,88%	
8	GALICIA	178	5,45%	
9	MURCIA R.	126	3,86%	
10	NAVARRE	91	2,79%	
11	BASQUE COUNTRY	68	2,08%	
12	CANARY ISLANDS	64	1,96%	
13	LA RIOJA	45	1,38%	
14	BALEARIC ISLANDS	31	0,95%	
15	MADRID	20	0,61%	
16	P. OF ASTURIAS	17	0,52%	
17	CANTABRIA	6	0,18%	
		3.264	100%	



- Most of the cooperatives (**74%**) are located in only **6 regions**.

* Source: Agricultural cooperatives with employees registered in Social Security in 2016 (MEYSS).

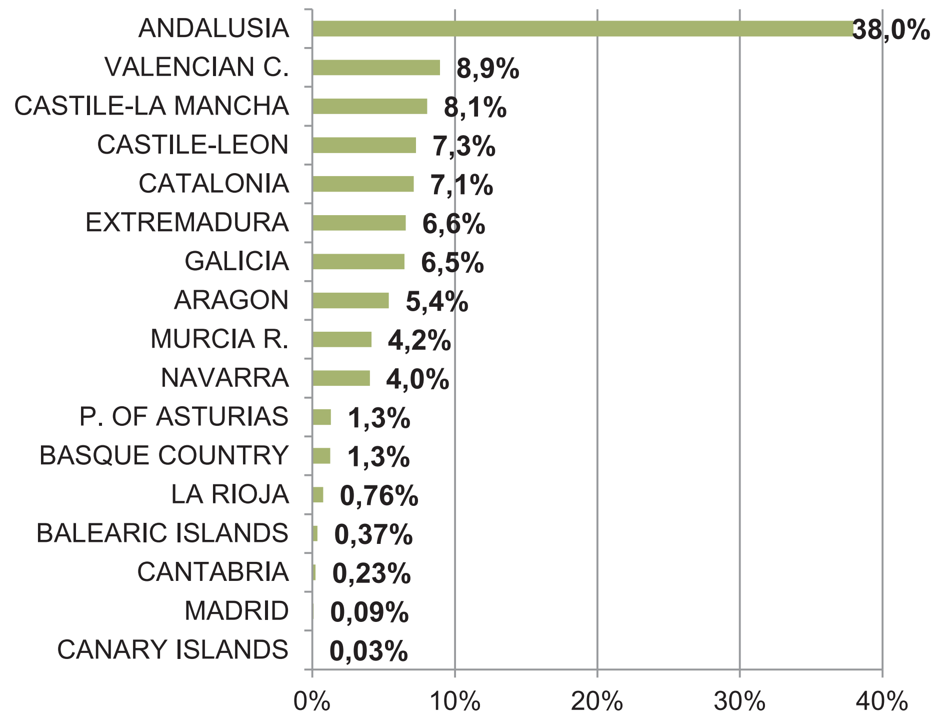
2.3. Geographical distribution (II)- Turnover

% turnover per region[1]

	Region	Turnover 2016* %	
1	ANDALUSIA	38,0%	76%
2	VALENCIAN C.	8,9%	
3	CASTILE-LA MANCHA	8,1%	
4	CASTILE-LEÓN	7,3%	
5	CATALONIA	7,1%	
6	EXTREMADURA	6,6%	
7	GALICIA	6,5%	
8	ARAGON	5,4%	
9	MURCIA R.	4,2%	
10	NAVARRA	4,0%	
11	P. OF ASTURIAS	1,3%	
12	BASQUE COUNTRY	1,3%	
13	LA RIOJA**	0,76%	
14	BALEARIC ISLANDS	0,37%	
15	CANTABRIA	0,23%	
16	MADRID	0,09%	
17	CANARY ISLANDS**	0,03%	
		100%	

[1]Direct turnover not including investee companies.

% Turnover/total (2016)



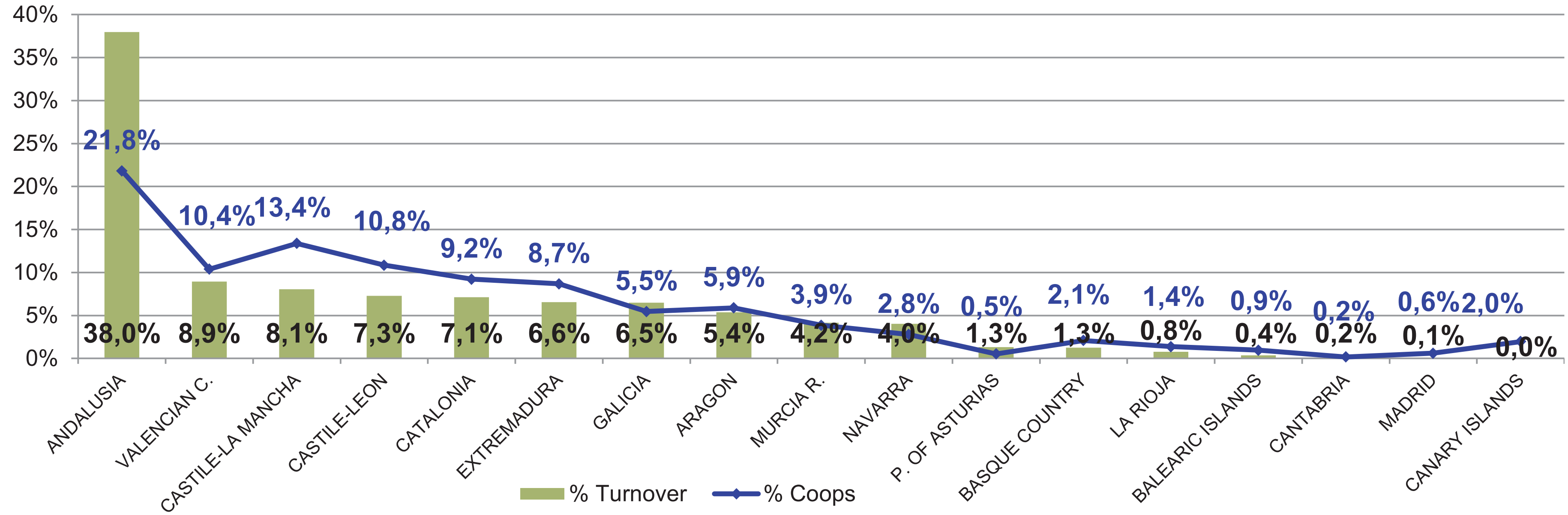
- The largest part of the turnover (**76%**) is concentrated in **6 regions**.

*Source: Directory of Cooperatives 2017 (Cooperativas Agro-alimentarias de España).
** Other sources.

2.3. Geographical distribution (III)-

Number and economic weight per region

Agri-food cooperatives* and turnover** per region (2016)



➢It can be highlighted the economic weight of the **Andalusian** agri-food cooperatives, representing **21,8%** of the total amount of cooperatives in Spain and **38% of the turnover**.

*Source: Agricultural cooperatives with employees registered in Social Security in 2016 (MEYSS).
**Direct turnover not including investee companies. Directory of cooperatives 2017 (Cooperativas Agro-alimentarias de España).

3. Agri-food cooperatives turnover

3.1. Cooperatives turnover

Evolution

+44% from 2006
+10,7% previous year

	2006	2012	2013	2014	2015	2016	Var 2015/16	Var 2006/16
Agri-food Cooperatives Turnover (Million €)[1]	**20.095**	**25.233**	**25.688**	**26.929**	**26.198**	**28.993**	**10,7%**	**44%**
Global Turnover including investee companies (Million €)[2]	wd	**25.935**	**27.330**	**29.152**	**28.204**	**30.992**	**9,9%**	**s/d**
Final Agricultural Production (Million €)[3]	37.176	41.955	44.065	43.994	45.491	46.807	2,89%	25,91%
Food Industry Net Sales (Million €)[4]	78.726	90.169	91.450	93.396	95.208	96.419	1,27%	22,47%

wd= without data

- Turnover increased by **+10,7%** compared to the previous year, mainly due to two factors: the recovery on olive oil production after a year of "vecería" (natural low yields in olive trees), and an increase of the horticultural sector turnover.
- To get an idea of the relative size of the Spanish agri-food cooperatives, the total direct turnover *(including investee companies)* is equivalent to:
    - **66%** of the **Final Agricultural Production** value.
    - **32%** of the Spanish **Food Industry Net Sales** value - cooperatives represent 13% of the group.

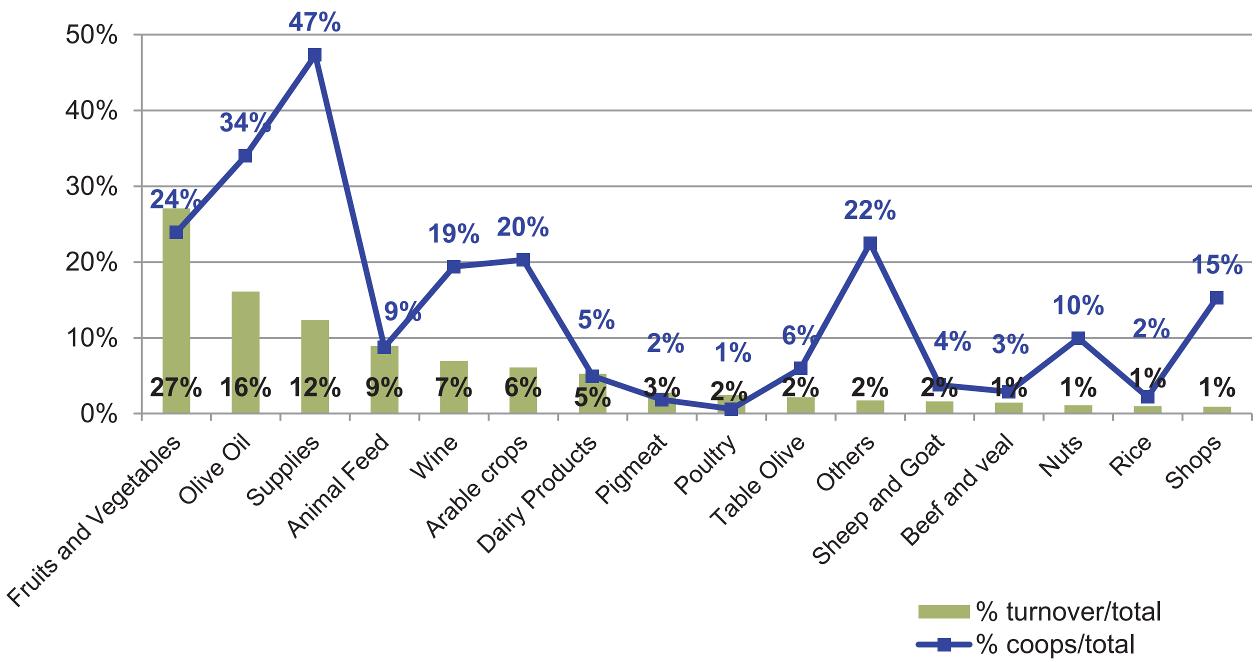
1. Direct turnover not including investee companies. Directory of cooperatives 2017 (Cooperativas Agro-alimentarias de España).
2. Previous data + investee companies turnover- Directory of cooperatives 2017.
3. Agricultural Statistical Yearbook 2016 (MAPAMA).
4. Agri-food Industries Report 2016 (FIAB).

4. Main sectors of Agri-food Cooperatives

4.1. Main sectors of Agri-food Cooperatives

% Turnover* and % of cooperatives per sector/total of cooperatives

16 Main sub-sectors and participation of cooperatives (2016)



* Direct turnover not including investee companies.

TOP Sectors per volume of turnover:

1. Fruits and Vegetables **(27%)**
2. Olive Oil **(16%)**
3. Supplies **(12%)**
4. Animal Feed **(9%)**
5. Wine **(7%)**
6. Crops **(6%)**

TOP Sector per number:

1. Around **47%** of cooperatives have activity in **Supplies.**
2. **Olive Oil**: **34%** of coops**.**
3. **Fruits and Vegetables: 24%** of coops.
4. **Services: 22%** of coops.
5. **Crops: 20%** of coops.
6. **Wine: 19%** of coops.

4.1. Main sectors of Agri-food Cooperatives

Degree of business concentration

Degree of concentration of the main 8 cooperative sectors (2016)

	Sectors	Average turnover/cooperative (Million €)	
		TOTAL COOPERATIVES	TOP 10
1	Fruits and Vegetables	9,6	182
2	Olive Oil	4,0	128
3	Supplies	2,2	82
4	Animal Feed	8,6	85
5	Wine	3,0	35
6	Arable crops	2,5	54
7	Dairy Products	9,0	67
8	Pigmeat	12,8	51

- **Different degree of concentration** of the main cooperative sectors is observed.
- Supplies, Arable crops, Wine and Olive Oil have a higher atomization degree, although it should be borne in mind that many of the first degree cooperatives are integrated into second degree entities, so there is a **hidden structuring phenomenon**.
- **Fruits and vegetables** sector is highly concentrated in the **Top 10 segment**.

5. Internationalisation

5.1. Internationalisation

Main figures (*)

	2016
% International markets turnover of agri-food cooperatives/ total agri-food sector (without fishing)	**18%**
% Export cooperatives / total agri-food cooperatives	**32%**
% 1st Degree Export cooperatives/total coops.	32%
% 2nd Degree Export cooperatives/total coops.	49%
% International markets turnover/total cooperatives turnover	**33%**
Average international markets turnover (Millions €)	**9,9**
1st degree international markets average turnover (M€)	6,5
2nd degree international markets average turnover (M€)	40

Increasing trend:

+3,4% No. cooperatives

+10,2% Turnover

- The number of exporting cooperatives continues to grow; In 2016 they increased by **+3,4%** and represented **32% of the total number of Spanish agri-food cooperatives**.
- Cooperatives **turnover in the international market increased** by **+10,2%,** representing **33%** of the total turnover of Spanish agri-food cooperatives.
- The international markets turnover of agri-food cooperatives represented **18%** of the **international markets turnover of total Spanish agri-food sector** (without fishing).

Source: Direct turnover, not including investee companies.
Directory of Cooperatives 2017 (Cooperativas Agro-alimentarias de España) and MAPAMA's Foreign Trade Report 2016.
(*) Calculations based on Cooperatives >1M€ (98% turnover) and only from the agri-food sector.

5.2. Top 20 export cooperatives

Main cooperatives

	ENTITIES	REGION	DEGREE	TOTAL TURNOVER 2016 (M€)	Export 2016 (M€)	% Export (s/ total)
1	ANECOOP	VALENCIAN C.	2	574	456	79%
2	COREN	GALICIA	2	1.000	410	41%
3	DCOOP	ANDALUSIA	2	1.001	382	38%
4	VICASOL	ANDALUSIA	1	202	172	85%
5	UNICA GROUP	ANDALUSIA	2	197	168	85%
6	ONUBAFRUIT	ANDALUSIA	2	193	155	80%
7	CASI	ANDALUSIA	1	185	148	80%
8	ALIMER	MURCIA R.	1	161	126	78%
9	AGRO SEVILLA ACEITUNAS	ANDALUSIA	2	135	124	92%
10	GRANADA LA PALMA	ANDALUSIA	1	139	114	82%
11	MURGIVERDE	ANDALUSIA	2	131	96	73%
12	SANTA MARIA DE LA RÁBIDA	ANDALUSIA	1	118	76	64%
13	INDASOL	ANDALUSIA	1	82	70	85%
14	CABASC	ANDALUSIA	1	82	68	83%
15	S.A.T. TROPS	ANDALUSIA	1	78	66	85%
16	HORTOFRUTÍCOLA MABE	ANDALUSIA	1	82	64	78%
17	AGROMOLINILLO	ANDALUSIA	1	59	53	90%
18	CUNA DE PLATERO	ANDALUSIA	1	88	53	60%
19	GREGAL	MURCIA R.	1	59	50	86%
20	ACTEL	CATALONIA	2	220	47	21%
				4.786	**2.894**	**60%**

- **Export turnover: +26%** increase regarding the previous year.
- **Average export: 145 M€/coop.**
- **Average export rate** of 73%

* Direct turnover not including investee companies. Source: Directory of Cooperatives 2017 (Cooperativas Agro-alimentarias de España).

6. Cooperatives Employment

6.1. Cooperatives Employment

- Total Spain: **100.831** total direct employment (permanent + temporary)

+3% /previous year, with **-0,6%** decrease of the number of cooperatives (agricultural and CEC)

	2007	2015	2016	Var 2007-15	Var 2014/15
Total Employment	91.454	97.824	100.831	+10%	+3%

* Source: Calculations based on data from MEYSS and Directory of cooperatives 2017 (Cooperativas Agro-alimentarias de España).

7. Summary: Main figures and analysis

7.1. Main figures and evolution 2007/16

Cooperatives, Members, Turnover and Employment

	2007	2013	2014	2015	2016	Var 2015/16	Var 2007/16
No. Cooperatives (agricultural + CEC)	3.996	3.838	3.780	3.762	3.740	**-0,6%**	**-6,4%**
No. members*	1.160.337	1.175.074	1.187.308	1.182.346	1.150.341	**-2,7%**	**-0,9%**
Turnover (M€)	20.875	25.688	26.929	26.198	28.993	**10,7%**	**38,9%**
Global turnover including investees (M€)	s/d	27.330	29.152	28.204	30.992	**9,9%**	**s/d**
Average size (M€) (Direct turnover/coop)	5,2	6,7	7,1	7,0	7,8	11%	48%
Total Employment	91.454	96.220	97.297	97.824	100.831	**3,1%**	**10,3%**
Sales /employee (€)	228.256	266.971	276.770	267.803	287.540	**7,4%**	**26%**

- Cooperatives continue showing a positive overall trend; **turnover and employment are increasing.**
- In 2016 there was a significant increase in turnover. It was mainly due to the recovery of the Olive Oil sector (after a “vecería” year) and the turnover growth in the horticultural sector.
- The **business concentration consequences** can be observed**:** a decrease in the number of cooperatives and an increase in their average size (+48% in the last 10 years), and also in the sales per employee (+26%).

•Only data of 1st degree cooperatives have been considered.
It must be taken into account that associates can be linked to more than one cooperative.

7.2. Analysis of the Structure (I): Dimension

Strata Micro/SME/Large company

Type of Company	No. Coops.	% Total	M€	% Total Turnover*	Average turnover* (M€)	Trend 2006-16	
						No.	€
Large	112	4%	10.883	48,5%	97	**20%**	**92%**
Medium	403	15%	6.736	30,0%	17	**9%**	**37%**
Small	989	38%	4.116	18,3%	4,2	**-7%**	**2%**
Micro	1124	43%	699	3,1%	0,6	**-16%**	**-17%**

* Direct turnover, not included investees companies.

More than **70% of cooperatives** have a dimension below **5 M€**

And the rest represents **88%** of the total turnover of cooperatives

***Integration trend:** In the last years there has been an increase in the size of cooperatives. Both, number and turnover of smaller companies strata -specially microenterprises- have decreased, causing an increase in the higher size strata- especially of large companies.

Source: Directory of cooperatives 2017 and previous years (Cooperativas Agro-alimentarias de España).

7.2. Analysis of the Structure (II): Dimension

Comparison. Total, Top 10, Top 60 and Food and Beverage Industry

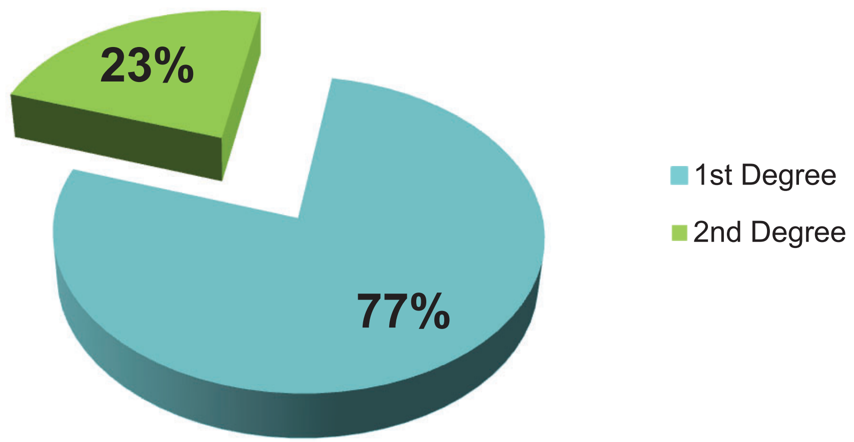
		Entities		Turnover			Employment		
		No.	% Total	Value (M€)	Average turnover(M€)	% Total	Total	Average	% Total
Cooperatives	Top 10	10	**0,3%**	4.604	**460**	**16%**	7.919	792	**8%**
Cooperatives	Top 60	60	**1,6%**	9.346	**156**	**32%**	20.662	344	**20%**
Cooperatives	Total España	3740	**100%**	**28.993** /30.992 with investees	**7,8** / 8,3 with investees	**100%**	100.831	27	**100%**
FI	Total Food Industry	28.038		96.419	3,4	N/A*	478.525	17,1	N/A*

- The **average turnover grows exponentially** when it is closer to the top of the ranking: **7,8 M€** (total Spain) < **156 M€** (Top 60) < **460 M€** (Top 10). The average turnover of the EU is 16M€ (source COGECA).
- These larger cooperatives continue to lead growing processes, increasing the average turnover per company and their relative weight over the group. They also have higher export rates.
- Agri-food cooperatives represent **13%** of the Spanish food industries, the **30%** of the turnover and **21%** of the employment. Average size of cooperatives is higher than the total average size of food industries. Overall, the Spanish food industry shows a high atomization.

7.2. Analysis of the Structure (III): Structuration

2nd Degree Cooperatives

% turnover/total 1st and 2nd degree entities 2016



- The **role of 2nd degree cooperatives** is very important: they concentrate and manage the processing and marketing of a very important volume of the 1st degree cooperatives production.
- **134 second-degree** entities represented **23% of the total turnover** of the agri-food cooperatives, with an average turnover of **49 M€/ company**.

*Source: Direct turnover, not including investee companies. Calculations over Total turnover of agri-food cooperatives.

7.3. Top 10 (I)

Global

✓**575 M€** Average
✓**18%** total Turnover

	Cooperative	Region	Degree	Turnover (M€)	Employees	Activities
1	**DCOOP**	ANDALUSIA	2	**1.163**	520	Olive Oil, Wine, Table Olive, Supplies, Services, Export
2	**COREN**	GALICIA	2	**1.000**	3.240	Animal feed, Poultry, Beef meat, Pigmeat, Cheese, Milk, Services, Export
3	**GRUPO AN**	NAVARRA	2	**767**	1.260	Arable crops, Poultry, Vegetables, Supplies, Fruits, Pigmeat, Animal Feed, Export, Organic Products, Shops, Services
4	**SAT CENTRAL LECHERA ASTURIANA**	P. OF ASTURIAS	1	**673**	17	Dairy milk, Services
5	**ANECOOP**	VALENCIAN C.	2	**663**	209	Citrus, Fruits, Vegetables, Wine, Export, Organic Products
6	**COVAP**	ANDALUSIA	1	**415**	690	Animal Feed, Beef Cattle, Sheep Meat, Pigmeat, Dairy Milk, Supplies, Services, Credit division, Export
7	**ACOR**	CASTILLE-LEON	1	**312**	541	Sugar, Crops, Supplies
8	**COBADU**	CASTILLE-LEON	1	**272**	171	Beef and veal, Goat Milk, Pork, Dairy Milk, Cheese, Supplies, Shops
9	**AGROPAL**	CASTILLE-LEON	1	**260**	392	Cereal, Fodder, Animal Feed, Supplies, Dairy Milk, Cheese, Beef and veal, etc.
10	**JAENCOOP**	ANDALUSIA	2	**225**	17	Olive Oil
				5.750	**7.057**	

➢ **+6%** turnover regarding previous year

•Turnover including investee companies.
Source: Directory of cooperatives 2017 (Cooperativas Agro-alimentarias de España).

7.3. Top 10 (II)

1st Degree Cooperatives

✓**289M€** Average
✓**9%** total Turnover

	Cooperative	Region	Degree	Turnover (M€)	Employees	Activities
1	SAT CENTRAL LECHERA ASTURIANA	P. OF ASTURIAS	7.470	673	17	Dairy milk, Services
2	COVAP	ANDALUSIA	7.301	415	690	Animal Feed, Beef Cattle, Sheep Meat, Pigmeat, Dairy Milk, Supplies, Services, Export
3	ACOR	CASTILLE-LEON	4.470	312	541	Sugar, Arable crops, Supplies
4	COBADU	CASTILLE-LEON	9.753	272	171	Beef cattle, Goat Milk, Pigmeat, Dairy milk, Cheese, Supplies, Shops
5	AGROPAL	CASTILLE-LEON	7.294	260	392	Cereal, Fodder, Animal Feed, Supplies, Dairy Milk, Cheese, Beef and veal, etc.
6	VICASOL	ANDALUSIA	595	219	1.198	Vegetables, Fruits, Supplies
7	COPISO SORIA	CASTILLE-LEON	1.212	211	114	Pigmeat, Animal Feed, Arable crops, Supplies
8	CASI	ANADALUSIA	1.775	205	904	Vegetables, Supplies
9	ALIMER	MURCIA R.	1.652	161	828	Vegetables, Fruits, Animal Feed, Pigmeat, Dairy milk, Flowers, Supplies, Services
10	CAMP D'IVARS D'URGELL	CATALONIA	3.545	161	93	Animal Feed, Beef and Veal, Pigmeat, Supplies, Services
			45.067	**2.889**	**4.948**	

➢ **+6%** turnover regarding previous year

•Turnover including investee companies.
Source: Directory of cooperatives 2017 (Cooperativas Agro-alimentarias de España).

7.3. Top 10 (III)

2nd Degree

✓**478M€** Average
✓**15%** Total turnover

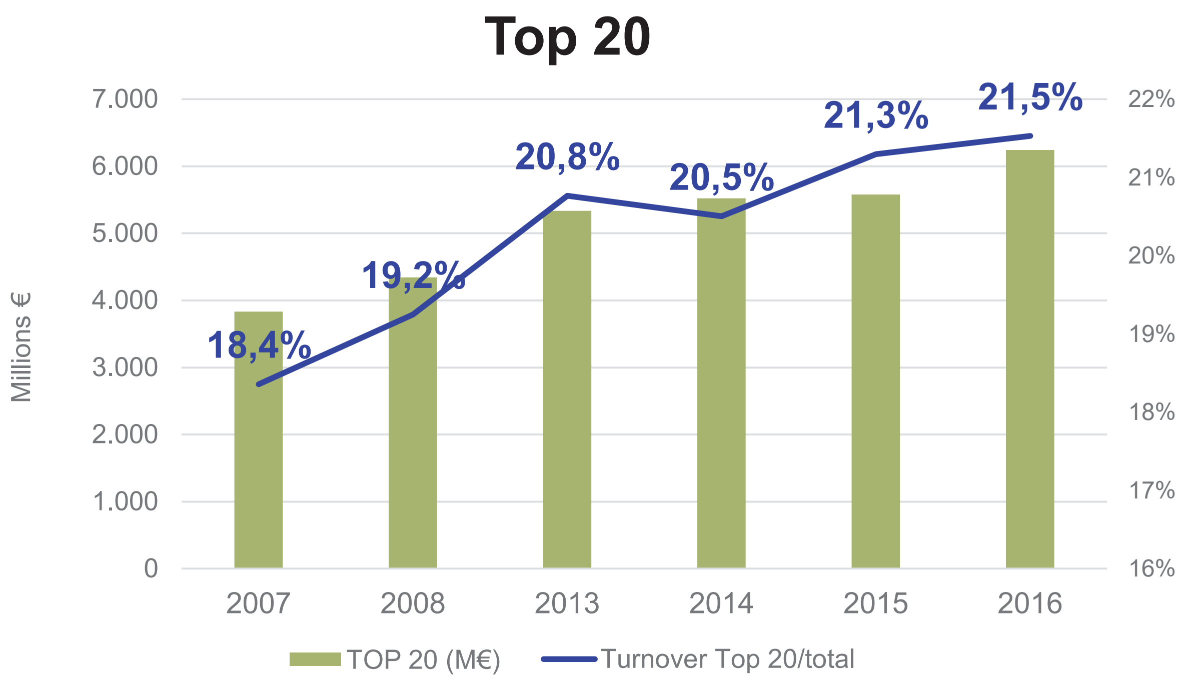
	Cooperative	Region	Degree	Turnover (M€)	Employees	Activities
1	**DCOOP**	ANDALUSIA	208	**1.163**	520	Olive Oil, Wine,Table Olive, Supplies, Services, Export
2	**COREN**	GALICIA	10	**1.000**	3.240	Animal feed, Poultry, Beef meat, Pork, Cheese, Milk, Services, Export
3	**GRUPO AN**	NAVARRA	159	**767**	1260	Crops, Poultry, Vegetables, Fuel, Fertilisers, Phytosanitary, Fruits, Pork, Animal Feed, Export, Organic Products, Credit division, Shops, Services
4	**ANECOOP**	VALENCIAN C.	68	**663**	209	Citrus, Fruits, Vegetables, Wine, Export, Organic Products
5	**JAENCOOP**	ANDALUSIA	11	**225**	17	Olive Oil
6	**ACTEL**	CATALONIA	118	**223**	222	Cereal, Fruit, Supplies
7	**UNICA GROUP**	ANDALUSIA	11	**206**	36	Vegetables, Processed Vegetables, Shops
8	**ONUBAFRUIT**	ANDALUSIA	5	**193**	28	Vegetables, Citrus, Fruits
9	**SUCA**	ANDALUSIA	26	**184**	43	Supplies, Shops
10	**AGRO SEVILLA ACEITUNAS**	ANDALUSIA	11	**153**	308	Table Olive
			627	**4.777**	**5.883**	

➢ **+10%** turnover regarding previous year

•Turnover including investee companies.
Source: Directory of cooperatives 2017 (Cooperativas Agro-alimentarias de España).

7.4. Top 20 Evolution

Turnover and economic weight



Increasing trend

* Direct turnover, not including investee companies.
Source: Directory of cooperatives 2017 and previous years (Cooperativas Agro-alimentarias de España).

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