



The Spanish Agri-food Cooperatives.

Socioeconomic report 2019

SOSAC 2020

SOCIOECONOMIC OBSERVATORY OF
SPANISH AGRI-FOOD COOPERATIVES.

-Cooperativas Agro-alimentarias de España-

Supported by MAPA

- Spanish Ministry of Agriculture, Fisheries and Food-



GOBIERNO
DE ESPAÑA

MINISTERIO
DE AGRICULTURA, PESCA
Y ALIMENTACIÓN



cooperativas
agro-alimentarias
España



1. Introduction

This report reflects data from:

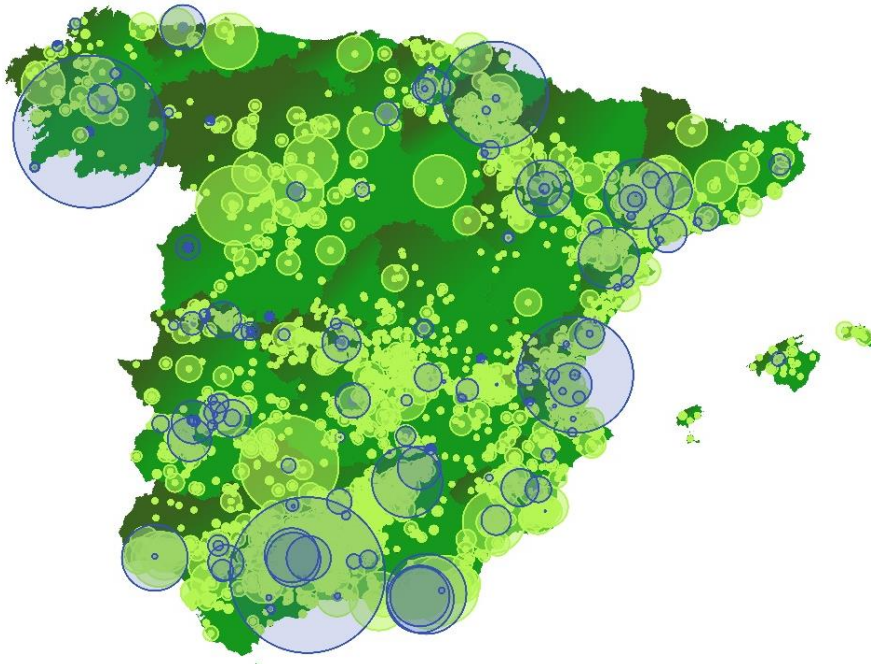
- > The “**Annual Cooperative Directory**” (OSCAE-2020): annual survey updating the main socioeconomic figures, sent at least to all the cooperatives linked to our Organization. In this year **2,609 entities** participated (data referring to the **2019 annual accounts**).
- > **Other sources** in the case of the Canary Islands.
- > Statistics from the **Ministry of Agriculture, Fisheries and Food (MAPA)** and the **Ministry of Employment and Social Economy (MITES)**.

MAPA: Ministerio de Agricultura, Pesca y Alimentación de España.
MITES: Ministerio de Trabajo y Economía Social de España.





2. Main socioeconomic figures



- > **3.669** cooperatives (**3.190** agricultural + **479** CEC).
- > **+ 1 Million** producer members.
- > Turnover: **30.556** Millions € (34.367 M€ included investee capital companies).
- > **+111.500** direct workers.

Sources: "Annual Directory of Cooperatives 2020" (Cooperativas Agro-alimentarias de España) and Ministry of Employment and Social Economy (MITES). Data 2018 (Last data available).





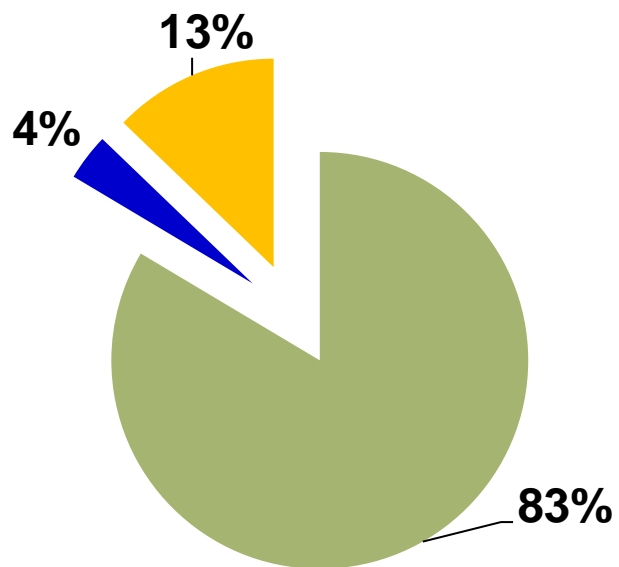
3. Agri-food Cooperatives: number, type and geographical distribution





3.1. Number and Type Total Spain

	Number
Agricultural Cooperatives	3.190
CEC	479
TOTAL	3.669



■ 1st Degree Coops ■ 2nd Degree Coops ■ CFC

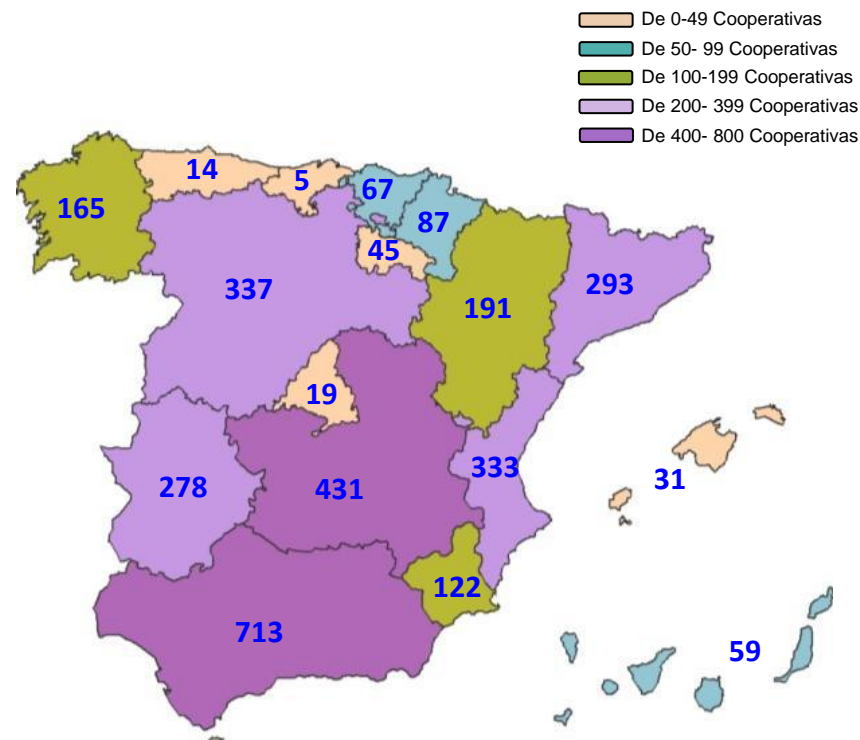
Source: Own elaboration from Cooperatives (agricultural and CFC-Community Farming Cooperatives) registered at Social Security 2018” (MITES) (Last data available).





3.2. Geographical Distribution (I)- No. cooperatives. Regions with the largest number of cooperatives

		Cooperatives		
	Regions	Nº	%	
1	ANDALUCÍA	713	22,4%	75%
2	C. LA MANCHA	431	13,5%	
3	C. y LEÓN	337	10,6%	
4	C. VALENCIANA	333	10,4%	
5	CATALUÑA	293	9,2%	
6	EXTREMADURA	278	8,7%	
7	ARAGÓN	191	6,0%	
8	GALICIA	165	5,2%	
9	R. MURCIA	122	3,8%	
10	NAVARRA	87	2,7%	
11	PAÍS VASCO	67	2,1%	
12	CANARIAS	59	1,85%	
13	RIOJA	45	1,41%	
14	I. BALEARES	31	0,97%	
15	MADRID	19	0,60%	
16	P. ASTURIAS	14	0,44%	
17	CANTABRIA	5	0,16%	
		3.190	100%	



➤ **75%** of the cooperatives are located in **6 Autonomous Regions**

Source: Own elaboration from agricultural cooperatives registered at social security 2018" (MITES) (Last data available).

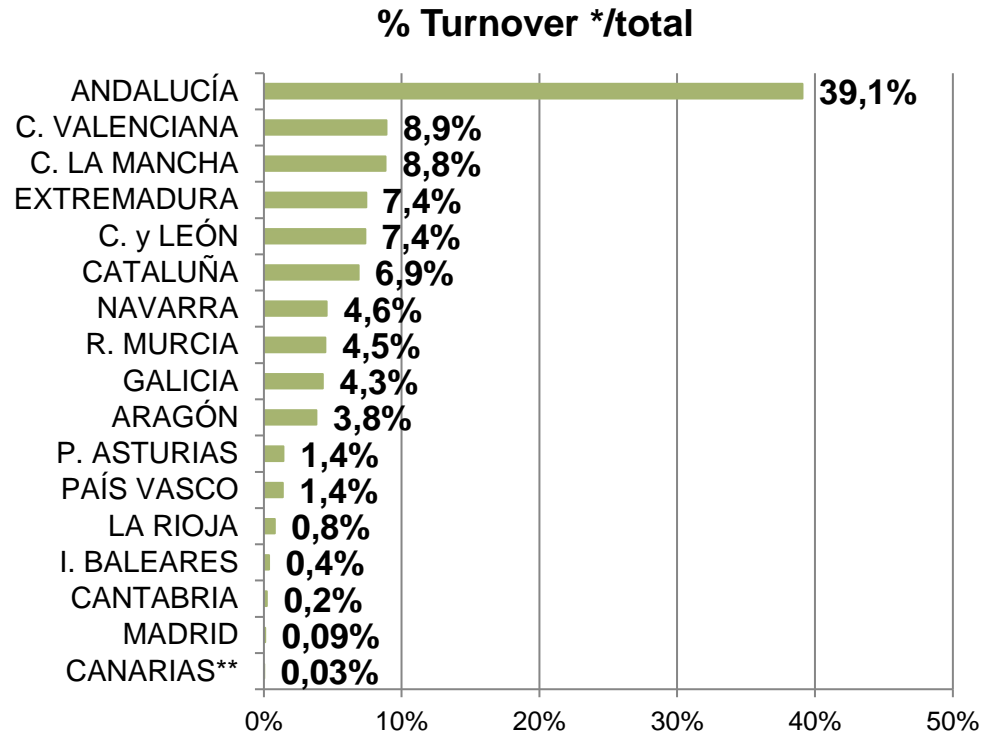




3.2. Geographical Distribution (II)-

% Turnover per region

		Turnover 2019*	
CCAA		%	
1	ANDALUCÍA	39,1%	79%
2	C.VALENCIANA	8,9%	
3	C. LA MANCHA	8,8%	
4	EXTREMADURA	7,4%	
5	C. y LEÓN	7,4%	
6	CATALUÑA	6,9%	
7	NAVARRA	4,6%	
8	R. MURCIA	4,5%	
9	GALICIA	4,3%	
10	ARAGÓN	3,8%	
11	P. ASTURIAS	1,4%	
12	PAÍS VASCO	1,4%	
13	LA RIOJA	0,8%	
14	I. BALEARES	0,4%	
15	CANTABRIA	0,23%	
16	MADRID	0,09%	
17	CANARIAS**	0,03%	
		100%	



➤ **79% of turnover is concentrated in 6 Autonomous Regions.**

* Direct turnover not including investee capital companies.

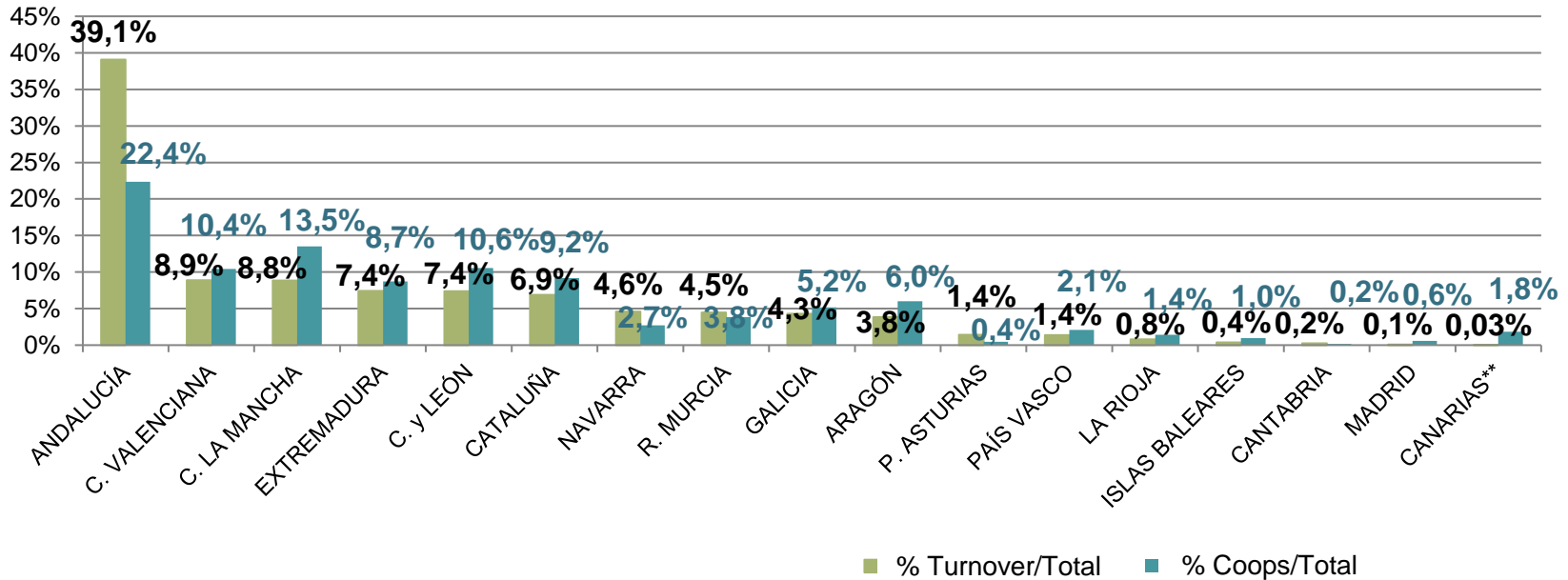
Source: Own elaboration from the "Annual Directory of Cooperatives 2020" (Cooperativas Agro-alimentarias de España) and **Other sources.





3.2. Geographical Distribution (III)- Number and economic weight per region

Agri-food Cooperatives number and turnover per region



➤ It can be noted the importance of the Andalusian agri-food cooperatives, representing **22,4%** of the total amount of cooperatives in Spain and **39%** of the turnover.

Source: Own elaboration based on agricultural cooperatives registered in Social Security in 2018" (MITES), "Annual Directory from Cooperatives 2020" (Cooperativas Agro-alimentarias de España) and **other sources.





4. Economic relevance of Cooperativism





4.1. Cooperatives turnover

Overall evolution. Agri-food context

+52% From 2006
+4,1% Previous year

	2006	2015	2016	2017	2018	2019	Var 2018/19	Var 2006/19
Agri-food cooperatives turnover (Million €) ¹	20.095	26.198	28.993	30.181	29.365	30.556	+4,1%	+52%
Global turnover investee capital companies (Million €) ²	20.095*	28.204	30.992	33.280	32.988	34.367	+4,2%	+71%
Final agricultural production value (Million €) ³	37.176	45.642	48.412	50.641	52.158	50.657	-2,9%	+36%
Net sales of food industries (Million €) ⁴	78.726	98.163	111.606	118.682	118.502	120.946	+2,1%	+54%

* There is not any data for that year from investee capital companies, so the direct turnover is taken in this case.

- Very positive trend (+52% from 2006). The direct turnover of that last campaign grew by **+4,1%** mainly due to the increase in turnover of the vegetables sector and, to a lesser extent, in the olive oil, cereals and pork sectors.
- To get an idea in relative terms, the total direct turnover of the Agri-food Cooperativism (including investee capital companies), is equivalent to:
 - **68% value of the final agricultural production value.**
 - **28% of the value of net sales of the Spanish food industry,** (cooperatives being 12% of the collective).

Sources: Own production from: 1. Direct turnover, without investee capital companies. "Annual Directory of Cooperatives 2020".

2. Previous data + turnover through investee capital companies according to the cooperative's share capital – "Annual Directory of Cooperatives 2020".

3. Statistical yearbook 2019 (MAPA).

4. FIAB report 2019.





5. Members of agri-food cooperatives





5.1. Members of cooperatives

➤ Total Spain: **1.165.595 members***

	2006	2015	2016	2017	2018	2019	Var 2018/19	Var 2006/19
Members*	1.160.337	1.182.346	1.150.341	1.172.226	1.159.579	1.165.595	+0,5%	+0,5%

➤ There is a stable trend.

*Only members of first-degree Cooperatives. In addition, there may be members who participate in more than one first-degree cooperative.
Source: Own elaboration. "Annual Directory of Cooperatives 2020" and earlier (Cooperativas Agro-alimentarias de España).





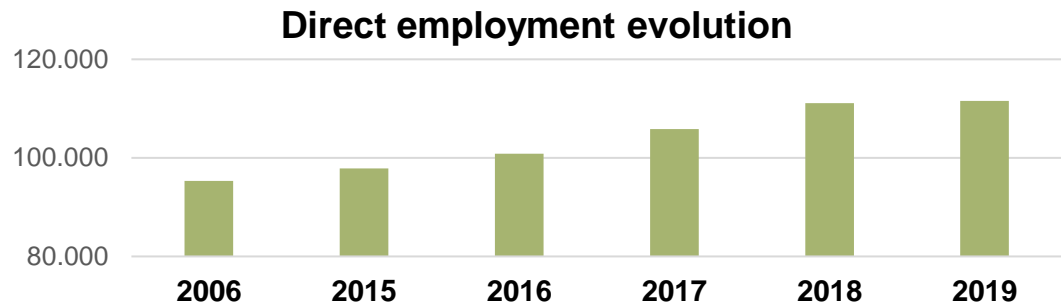
6. Employment in Cooperatives





6.1. Employment in Cooperatives

- Total Spain: **111.584** total direct employment (permanent + temporary workers)



**Growing trend:
+17% from 2006**

	2006	2015	2016	2017	2018	2019	Var 2018/19	Var 2006/19
Total Employment	95.342	97.824	100.831	105.843	111.151	111.584	+0,4%	+17%

- There is a growth dynamic. It is mainly due to the increase of employment in the fruit and vegetable sector.
- The 46% is women employment.

Source: Own elaboration. Proyections based on MITES data and "Annual Directory of Cooperatives 2020" (Cooperativas Agro-alimentarias de España).





7. Main sectors in Agri-food Cooperatives

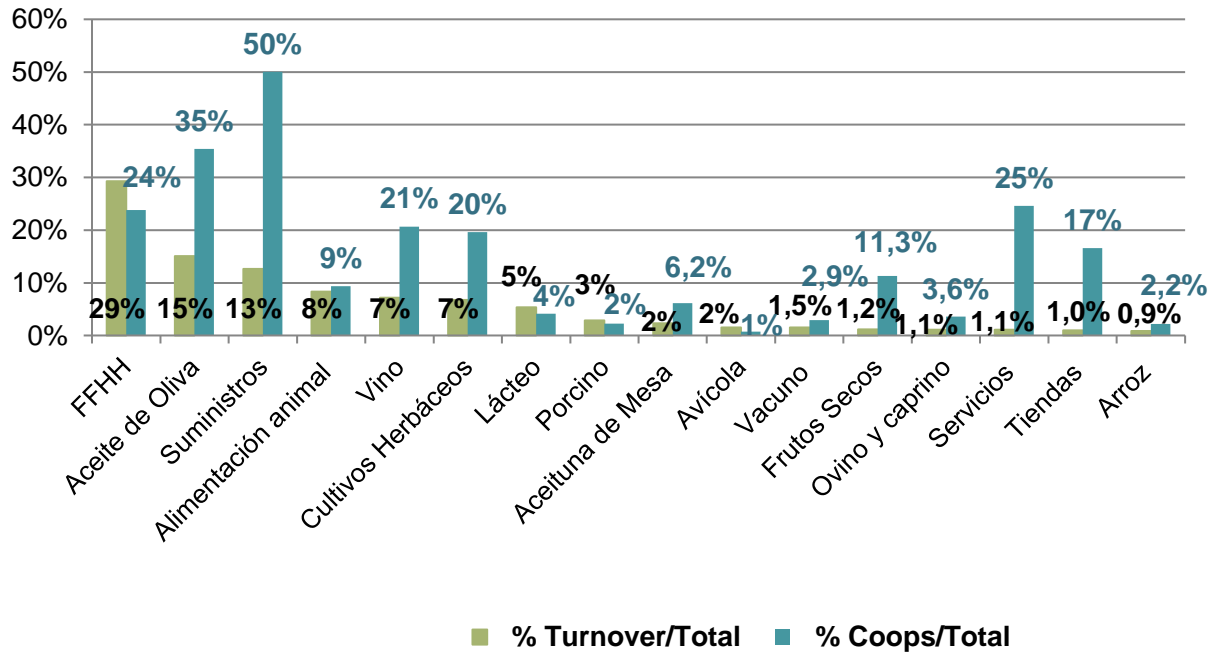




7.1. Main sectors in agri-food cooperatives

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

Main 16 sub-sectors and participation of cooperatives (2019)



TOP Sectors by turnover volume:

1. Fruits and Vegetables (29%)
2. Olive oil (15%)
3. Supplies (13%)
4. Wine (7%)
5. Animal Feed (8%)
6. Arable Crops (7%)

Top Sector per number:

1. **50%** of cooperatives have activity in **Supplies and inputs**
2. **Olive oil: 35%** of coops
3. **Fruits and Vegetables: 25%** of coops
4. **Services: 25%** of coops
5. **Wine: 21%** of coops
6. **Arable Crops: 20%** of coops

*Direct turnover not including investee capital companies.
 Source: Own elaboration from "Annual Directory of Cooperatives 2020"
 (Cooperativas Agro-alimentarias de España).

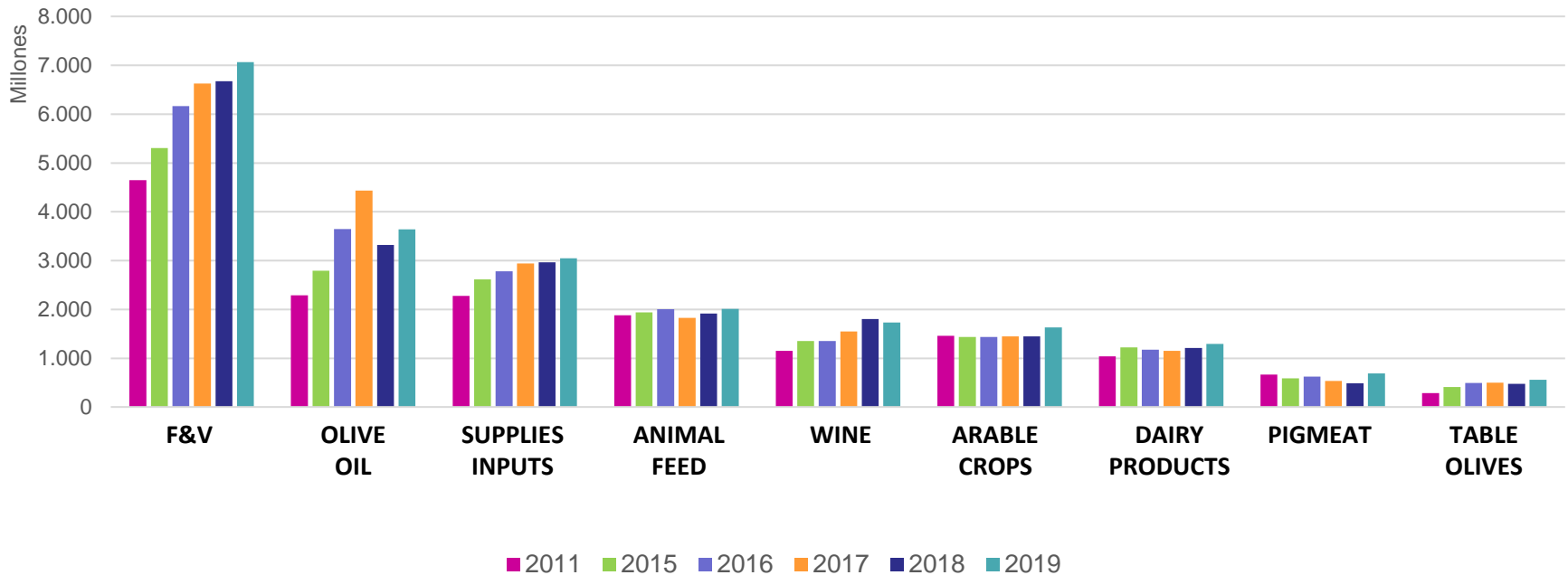




7.2. Main sectors of Agri-food Cooperatives

Temporal evolution value productions/activities

Evolution of the main sectors (2011-2019). Million Euros.



* Direct turnover not including investee capital companies.

Source: Own elaboration based on the sample of surveyed coops in the "Annual Directory of Cooperatives 2020 and previous" (Cooperativas Agro-alimentarias de España).





8. Internationalization in Cooperatives





8.1. Internationalization

Main figures (*)

	2019
% Foreign markets turnover of agri-food cooperatives/ total agri-food sector (excluding fishing)	16%
% Export cooperatives /total cooperatives	30,5%
% 1 ^{er} Degree Export cooperatives /total coops	29%
% 2 ^o Degree Export cooperatives/total coops	52%
% Foreign markets turnover/total cooperatives	31,3%
Average foreign markets turnover (M€)	10,6
1 ^{er} degree foreign markets average turnover (M€)	6,8
2 ^o degree foreign markets average turnover (M€)	42

+82% Turnover from 2011
+6,8 % Turnover from previous year

- Exports of agri-food cooperatives have shown a very positive evolution in recent years, with a significant increase in turnover in foreign markets between 2011 and 2019 of **+82%**
- In 2019, **30,5% of the cooperatives exported and the value generated represented 31,3% of the total turnover** of the collective.
- There was a growth of **+6,8%** in the value of the previous year's exports, mainly due to the increase of the exportation of fruits and vegetables.
- Cooperatives represented **16%** of the exports turnover of the entire Spanish agri-food sector (without fishing).

(-) Calculations based on Cooperatives >1M€ (Bring together 98% turnover) and only on agri-food sectors.

Source: Own elaboration from "Annual Directory of Cooperatives 2020" (Cooperativas Agro-alimentarias de España) and international trade MAPA report 2019. Direct turnover, not including investee capital companies.





8.2. Top 20 export cooperatives

Main cooperatives

	COOPERATIVE	REGIONS	DEGREE	TURNOVER* TOTAL 2019 (M€)	EXPORTATION* 2019 (M€)	% EXPORTATION (s/ total)
1	ANECOOP	C. VALENCIANA	2	659	515	78%
2	DCOOP	ANDALUCÍA	2	1.009	372	37%
3	ÚNICA GROUP	ANDALUCÍA	2	348	278	80%
4	COREN	GALICIA	2	572	217	38%
5	ONUBAFRUIT	ANDALUCÍA	2	237	203	86%
6	ALIMER	R. MURCIA	1	208	178	86%
7	VICASOL	ANDALUCÍA	1	231	169	73%
8	GRUPO AN	NAVARRA	2	614	132	21%
9	MURGIVERDE	ANDALUCÍA	2	164	131	80%
10	GRANADA LA PALMA	ANDALUCÍA	1	142	124	87%
11	AGRO SEVILLA ACEITUNAS	ANDALUCÍA	2	116	106	92%
12	HORTOFRUTÍCOLA MABE	ANDALUCÍA	1	94	94	100%
13	CASI	ANDALUCÍA	1	204	92	45%
14	CABASC	ANDALUCÍA	1	88	79	90%
15	SANTA MARÍA DE LA RÁBIDA	ANDALUCÍA	1	151	76	50%
16	SAT TROPS	ANDALUCÍA	1	97	68	70%
17	CUNA DE PLATERO	ANDALUCÍA	1	102	61	60%
18	INDASOL	ANDALUCÍA	1	91	59	65%
19	GREGAL	R. MURCIA	1	62	55	89%
20	OLEOESTEPA	ANDALUCÍA	2	161	53	33%
				5.348	3.061	

- Average export: **153 M€/coop.**
- Average export rate: **68%**
- **+12%** Previous year
- **Fruit and Vegetable predominance**

* Direct turnover not including investee capital companies.

Source: Own elaboration based on the "Annual Directory of Cooperatives 2020" (Cooperativas Agro-alimentarias de España).





9. Organic Production in Cooperatives





9.1. Organic Production

Main figures and evolution

	2011	2015	2016	2017	2018	2019	Var 2018/19	Var 2011/19
No. Cooperatives (Total sample)	2784	2572	2628	2632	2575	2609	1,3%	-6,3%
No. Cooperatives with Organic Production	121	252	274	327	362	387	6,9%	219,8%
% Organic coops/total sample	4%	9,80%	10,4%	12,4%	14,1%	14,8%	5,5%	10,8%
Total turnover sample (Millions €)	18.139	20.442	22.434	23.631	22.948	24.153	5,3%	33,2%
Turnover Organic Production of Cooperatives (Millions €)	96,9	227,9	363,4	446,3	582,9	783,0	34,3%	708,0%
% Organic turnover weight/total sample	0,5%	1,1%	1,6%	1,9%	2,5%	3,2%	27,6%	2,7%
Total value of Organic Production from Spain	1.005	1.202	1.619	1.708	1.829	2.133	8,3%	130,0%
Organic coops turnover weight/Total value ecological prod Spain	10%	14%	21%	24%	27%	34%	24,0%	24,2%

Growing trend 2011-19:
 x 2,2 in number
 x 7 in value

- Spanish agri-food cooperatives have also shown a strong increase in the production and marketing of organic products (the value of coops sales has increased 7 times since 2011).
- **The value of cooperative organic products represented 34% of the total value of Spanish organic production.**

Source: Own elaboration based on the sample of surveyed coops in the "Annual Directory of Cooperatives 2020 and previous" (Cooperativas Agro-alimentarias de España); "Characterization studies and analysis of the viability of an agri-food interbranch organization in the organic production sector in Spain" MAPA.2018 and previous "Report on the evaluation and characterization of the potential contribution of ecological production to the sustainability of the Spanish rural environment". MAPA 2019.





10. Women's participation in Cooperatives





10.1. Women's participation

Main figures and evolution

Regions	Weight of women member of total members				Weight of women on Governing Council				Representation of women in the presidency			Representation of women in the management
	2016	2018	2019	Var 16/19	2017	2018	2019	Var 17/19	2018	2019	Var 18/19	2019
ANDALUCÍA	29,9%	30,9%	32,2%	2,3%	5,0%	5,4%	6,3%	1,2%	1,7%	2,7%	1,0%	8,6%
ARAGÓN	14,4%	17,6%	17,4%	3,0%	2,7%	3,2%	2,7%	0,0%	3,4%	2,0%	-1,3%	16,8%
CANTABRIA	5,6%	5,8%	5,9%	0,3%	9,1%	9,1%	9,1%	0,0%	0,0%	0,0%	0,0%	0,0%
CASTILLA y LEÓN	16,0%	18,7%	18,7%	2,7%	5,6%	6,6%	6,5%	0,9%	1,6%	2,5%	0,8%	12,3%
C. LA MANCHA	25,3%	24,4%	27,1%	1,7%	8,6%	8,9%	9,9%	1,3%	2,5%	6,2%	3,7%	4,8%
CATALUÑA	19,6%	18,0%	22,1%	2,5%	5,2%	5,4%	5,4%	0,2%	3,4%	1,7%	-1,8%	7,3%
C. VALENCIANA	21,7%	25,8%	25,8%	4,1%	7,7%	7,9%	7,9%	0,2%	4,2%	4,2%	0,0%	9,2%
EXTREMADURA	21,6%	23,6%	23,9%	2,3%	7,1%	9,7%	12,1%	5,0%	5,0%	5,6%	0,6%	13,2%
GALICIA	46,3%	45,1%	44,0%	-2,3%	22,0%	21,9%	21,9%	-0,1%	9,4%	7,5%	-1,9%	26,4%
ISLAS BALEARES	20,9%	22,1%	23,2%	2,3%	9,4%	9,2%	9,2%	-0,2%	3,7%	6,9%	3,2%	37,9%
LA RIOJA	S/D	S/D	24,9%	S/D	S/D	S/D	4,8%	S/D	S/D	0,0%	S/D	29,2%
MADRID	27,0%	26,8%	25,4%	-1,6%	7,0%	9,0%	8,6%	1,5%	8,0%	8,0%	0,0%	28,0%
NAVARRA	18,7%	20,7%	19,5%	0,8%	8,5%	4,0%	4,9%	-3,5%	4,0%	2,4%	-1,6%	16,9%
PAÍS VASCO	16,7%	25,3%	22,8%	6,0%	11,9%	17,9%	18,2%	6,3%	14,0%	13,0%	-1,1%	9,3%
P. DE ASTURIAS	13,2%	14,3%	14,5%	1,3%	14,3%	20,0%	21,7%	7,4%	22,2%	11,1%	-11,1%	22,2%
R. DE MURCIA	30,8%	30,4%	29,8%	-1,0%	3,3%	4,1%	5,3%	2,0%	8,5%	8,5%	0,0%	8,5%
Total general	24,5%	26,0%	27,1%	+2,6%	6,8%	7,4%	8,0%	+1,2%	3,6%	4,4%	+0,8%	10,4%

- Women represent **27% of the social base** and **8% of the composition of our governing councils**. A **4,4%** hold the Presidency and a **10,4%** hold management positions.
- In the recent years (for which we have data) there has been a **slight increase in the participation of women in all the above-mentioned categories**.

Source: Own elaboration based on the sample of first-degree surveyed coops in the "Annual Directory of Cooperatives 2020" (Cooperativas Agro-alimentarias de España)





11. Youth participation in Cooperatives





11.1. Youth Participation*

Main Figures and evolution

Regions	Weight of young people over total members			Weight of young people over governing council			Young people in presidency			Young people in management
	2018	2019	Var 18/19	2018	2019	Var 18/19	2018	2019	Var 18/19	2019
ANDALUCÍA	10,6%	11,1%	0,6%	5,6%	6,2%	0,7%	2,0%	3,3%	1%	5,6%
ARAGÓN	7,8%	7,4%	-0,4%	12,9%	12,8%	-0,1%	7,4%	4,7%	-3%	4,0%
CANTABRIA	0,0%	0,0%	0,0%	0,0%	0,0%	0,0%	0,0%	0,0%	0%	100,0%
C. y LEÓN	10,2%	10,5%	0,3%	5,9%	7,5%	1,6%	0,8%	1,6%	1%	10,7%
C. LA MANCHA	3,5%	4,8%	1,3%	3,3%	6,5%	3,1%	2,1%	4,4%	2%	4,4%
CATALUÑA	14,6%	14,2%	-0,4%	23,1%	23,1%	0,0%	0,0%	0,0%	0%	0,6%
C. VALENCIANA	12,7%	12,7%	0,0%	6,5%	6,4%	0,0%	0,4%	0,4%	0%	7,9%
EXTREMADURA	10,2%	10,2%	0,1%	11,5%	13,0%	1,5%	2,3%	5,6%	3%	9,8%
GALICIA	1,8%	3,3%	1,5%	9,8%	11,3%	1,6%	3,8%	9,4%	6%	17,0%
ISLAS BALEARES	13,2%	16,6%	3,4%	9,6%	11,8%	2,2%	0,0%	3,4%	3%	13,8%
LA RIOJA	S/D	10,7%	S/D	S/D	12,9%	S/D	S/D	12,5%	S/D	20,8%
MADRID	3,3%	3,2%	-0,1%	6,9%	7,0%	0,0%	4,0%	4,0%	0%	8,0%
NAVARRA	2,7%	2,3%	-0,4%	6,9%	8,3%	1,4%	4,8%	6,5%	2%	8,1%
PAÍS VASCO	9,6%	9,1%	-0,5%	11,3%	15,0%	3,7%	8,8%	7,4%	-1%	9,3%
P. DE ASTURIAS	0,0%	0,0%	0,0%	5,0%	5,0%	0,0%	0,0%	0,0%	0%	0,0%
R. MURCIA	7,9%	7,9%	0,0%	0,4%	0,4%	0,0%	1,4%	1,4%	0%	1,4%
Total general	9,2%	9,6%	+0,4%	7,9%	9,2%	+1,3%	2,3%	3,7%	+1,3%	6,4%

- Young people represent **9.6%** of the social base and **9.2%** of the composition in their governing councils, **3.7%** hold the presidency and **6.4%** the management positions.
- In the **last two years** (for which we have data), we observed a **slight increase in young people** (farmers and professionals) in all the categories.

*Young people (≤ 40 years)

Source: Own elaboration based on the sample of first-degree surveyed coops in the "Annual Directory of Cooperatives 2020" (Cooperativas Agro-alimentarias de España).





12. Summary of main figures and evolution. Analysis of the structure.





12.1. Main figures and evolution 2006/19

Cooperatives, Members, Turnover and Employment

	2006	2015	2016	2017	2018	2019	Var 2018/19	Var 2006/19
No. Cooperatives (agricultural+CEC)	4.022	3.762	3.740	3.699	3.669	3669*	s/d	-8,8%
No. members*	1.160.337	1.182.346	1.150.341	1.172.226	1.159.579	1.165.595	0,5%	0,5%
Turnover (M€)	20.095	26.198	28.993	30.181	29.365	30.556	4,1%	52%
Global turnover including investees capital companies (M€)	20.095**	28.204	30.992	33.280	32.988	34.367	4,2%	+71%
Average size (M€) (Direct turnover/coop)	5,0	7,0	7,8	8,2	8,0	8,3	4,1%	67%
Total Employment	95.342	97.824	100.831	105.843	111.151	111.583	0,4%	17%
Sales/employee (€)	196.275	267.803	287.540	285.147	264.190	273.835	3,7%	40%

- Over the past few years, the cooperatives have shown a very positive overall trend, with a **+52% increase in turnover and a +17% in direct employment** since 2006, showing their relevance as economic drivers and as job generators in rural areas where they are settle.

*As there is no update MITES data, we take the same data from the previous year.

** There is not any data for that year from investee capital companies, so the direct turnover is taken in this case.

***Only data of first-degree cooperatives have been considered.

Members may also participate in more than one first-degree cooperative.

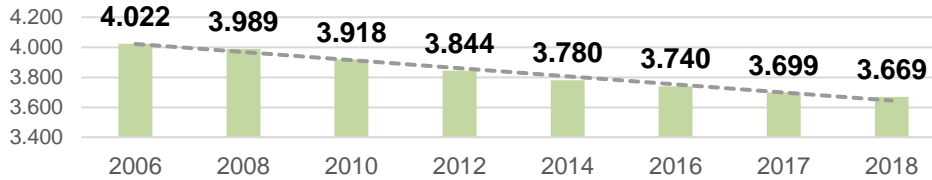




12.2. Main figures and evolution 2006/18

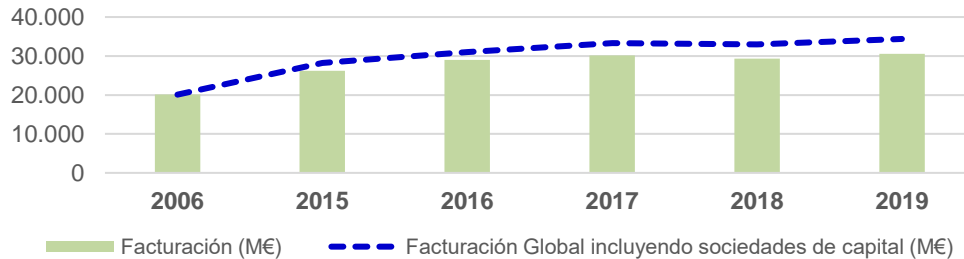
Business concentration

Number of agri-food cooperatives
(Agrarias + CEC)



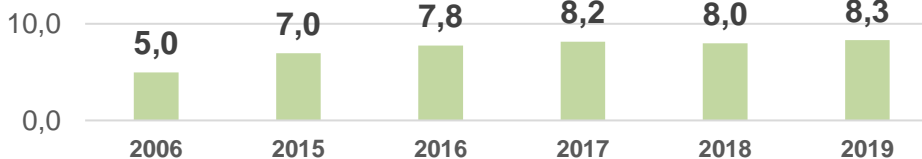
-8,8%

Turnover evolution (M€)



+52%

Average size (M€/coop)



+67%

➤ A **business concentration** effect is observed: the number of cooperatives decreases, while the turnover, the average size of each company and the sales per employee increases.





12.3. Analysis of the Structure (I): Size

Strata Micro/Small/Medium/Large Company

Type of Company*	Nº Coops.	% Total	Millions €	% Total turnover*	Average Turnover (M€)	Trend 2006-19	
						Nº	€
Large	124	5%	12.201	50,5%	98	33%	115%
Medium	420	16%	7.140	29,6%	17	14%	45%
Small	990	38%	4.114	17,0%	4,2	-7%	2%
Micro	1075	41%	698	2,9%	0,6	-19%	-17%



“21% of cooperatives account for 80% of the total cooperatives turnover”

*Type of company:

Large: ≥ 250 workers and >50 millions €

Medium: ≥50 and <250 workers and >10 and ≤ 50 millions €

Small: ≥10 and <50 workers and >2 and ≤ 10 millions €

Micro: <10 workers and ≤ 2 millions €

***Integration trend:** a continuous process of size increase is observed. The number and turnover of the smaller strata companies (especially micro-enterprises) has decreased, while at the same time the size of the upper strata, especially the large stratum, has increased.

* Direct turnover, not included investee capital companies.

Source: Own elaboration based on the sample of surveyed coops in the “Annual Directory of Cooperatives 2020 and previous” (Spanish Agri-food Cooperative)





12.4. Analysis of the Structure (II): Dimension

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

		Entities		Turnover			Employment		
		No.	% Total	Value (M€)	Average turnover (M€)	% Total	Total	Average	% Total
Cooperatives	Top 10	10	0,3%	4.692	469	15%	9.058	906	8%
	Top 60	60	1,6%	10.100	168	33%	22.630	377	20%
	Total Spain	3669	100%	30.556 /34.367 w/investees	8,3 / 9,4 w/investees	100%	111.584	30	100%
FI	Total Food Industry	30.730		120.946	3,9	N/A*	520.600	16,9	N/A*

*N/A: doesn't apply

- ▶ **The average turnover of the cooperatives grows exponentially** when it is closer to the top of the ranking: **8,3 M€** (total Spain) < **168 M€** (Top 60) < **469 M€** (Top 10). The average turnover of the EU is 16 M€ (source COGECA).
- ▶ Cooperatives represent **12%** of the total Spanish food industries, **28% of turnover and 21%** of employment. Average size of cooperatives is higher than the total food industries average. Overall, the Spanish food industry shows a high atomization.

* Direct turnover without including investee capital companies.

**turnover including investee capital companies according to % share capital

Source: Own elaboration based on the sample of surveyed coops in the "Annual Directory of Cooperatives 2020 and previous" (Spanish Agri-food Cooperative) and FIAB 2019 report.

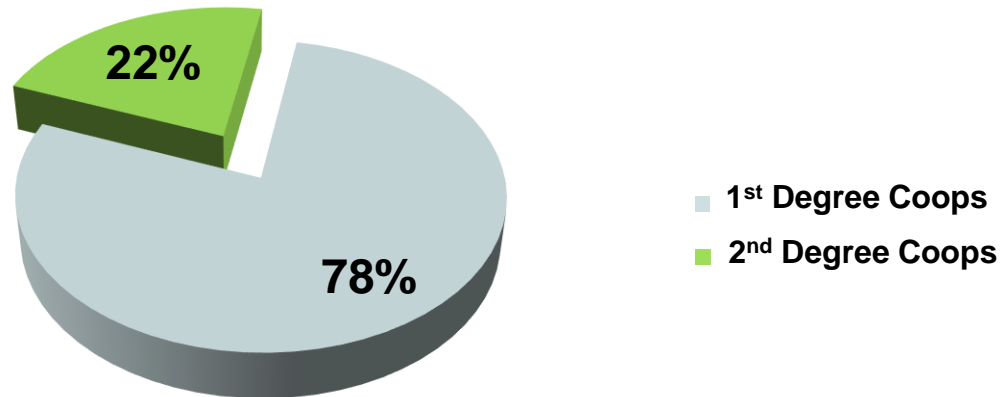




12.5. Analysis of Structure (III): Structuration

2nd Degree Cooperatives

% Turnover 1st and 2nd degree/ total coops 2019



- ▶ 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).
- ▶ **40%** of 1st degree cooperatives participate in 2nd degree cooperatives.
- ▶ **129 second-degree entities** accounted for **22%** of the total turnover of the agri-food cooperatives, with an average turnover of **51 M€/ company**.

Direct turnover, not including investee capital companies.

*Source: calculations based on sample of surveyed coops over total turnover of agri-food coops.
"Annual Directory of Cooperatives 2020" (Cooperativas Agro-alimentarias de España).





13. Ranking of main Agri-food Cooperatives





13.1. Top 10- Global

✓704 M€ Average
✓20% Total Turnover

	Cooperative	Regions	Degree	Global turnover(M€)*	Employees	Activities
1	DCOOP	ANDALUCÍA	2	1.322	751	Olive oil, Table olive, Supplies, Arable crops, Wine, Milk, Pigmeat, Dried Nuts, Bovine, Shops and Credit Section.
2	GRUPO AN	NAVARRA	2	1.265	1.115	Vegetables, Cereals, Supplies, Poultry, Fruits and Shops.
3	COREN	GALICIA	2	1.101	3.140	Animal feed, Poultry, Pigmeat, Eggs, Bovine.
4	CENTRAL LECHERA ASTURIANA/CAPSA	P. ASTURIAS	1	761	19	Dairy milk.
5	ANECOOP	C. VALENCIANA	2	749	238	Vegetables, Citrics, Fruits, Wine, Supplies and Services.
6	COVAP	ANDALUCÍA	1	613	849	Dairy Milk, Feed, Pigmeat, Bovine, Sheep meat, Supplies and Shops
7	ÚNICA GROUP	ANDALUCÍA	2	348	46	Vegetables, Fruits and Supplies
8	COBADU	C. y LEÓN	1	346	262	Feed, Bovine, Pigmeat, Supplies, Dairy Milk, Arable crops, Ovine and Shops.
9	KAIKU	PAÍS VASCO	1	282	16	Dairy milk
10	VICASOL	ANDALUCÍA	1	252	2.562	Vegetables and Supplies
				7.040	8.998	

➤ +7% turnover regarding previous year

*Turnover 2019 including investee capital companies according to % share capital.
Source: "Annual Directory of Cooperatives 2020" (Cooperativas Agro-alimentarias de España).





13.2. Top 10- 1st Degree

✓ 334 M€ Average
✓ 10% Total Turnover

	Cooperative	Regions	Members	Global turnover (M€) *	Employees	Activities
1	CENTRAL LECHERA ASTURIANA/CAPSA	P. ASTURIAS	7.044	761	19	Milk.
2	COVAP	ANDALUCÍA	7.260	613	849	Milk, Feed, Porcine, Bovine, Ovine, Supplies and Shops.
3	COBADU	C. y LEÓN	10.494	346	262	Feed, Bovine, Porcine, Supplies, Milk, Arable Crops, Ovine and Shops.
4	KAIKU	PAÍS VASCO	257	282	16	Milk.
5	VICASOL	ANDALUCÍA	941	252	2.562	Vegetables and Supplies.
6	AGROPAL	C. y LEÓN	8.021	235	482	Arable Crops, Supplies, Feed, Milk, Shops, Forage, Bovine, Ovine and Vegetables.
7	CASI	ANDALUCÍA	1.337	224	1.093	Vegetables, Supplies, Services and Fruits.
8	ACOR	C. y LEÓN	4.469	218	531	Suggar, Arable Crops, Supplies and Shops.
9	ALIMER	R. MURCIA	1.847	208	863	Vegetables, Porcine, Feed, Fruits, Milk, Goat, Supplies, Cut flowers and Services.
10	CLUN	GALICIA	3.450	206	247	Milk, Feed, Supplies, Shops, Services, Forage, Vegetables and Bovine.
			45.120	3.346	6.924	

➤ +5% Turnover regarding previous year

*Turnover 2019 including investee capital companies according % share capital.
Source: "Annual Directory of Cooperatives 2020" (Cooperativas Agro-alimentarias de España).





13.3. Top 10- 2nd Degree

✓ 587 M€ Average
✓ 17 % Total Turnover

	Cooperative	Regions	No. Member Coops.	Global turnover (M€)*	Employees	Activities
1	DCOOP	ANDALUCÍA	228	1.322	751	Olive oil, Table Olive, Wine, Supplies, Arable crops, Wine, Milk, Pigmeat, Dried Nuts, Bovine, Shops and Credit Section.
2	GRUPO AN	NAVARRA	160	1.265	1.115	Vegetables, Cereals, Supplies, Poultry, Fruits and Shops.
3	COREN	GALICIA	10	1.101	3.140	Feed, Poultry, Pigmeat, Eggs and Bovine.
4	ANECOOP	C. VALENCIANA	69	749	238	Vegetables, Citrics, Fruits, Wine, Supplies and Services.
5	ÚNICA GROUP	ANDALUCÍA	13	348	46	Vegetables, Shops and Supplies.
6	AGRO SEVILLA ACEITUNAS	ANDALUCÍA	12	246	600	Table Olive.
7	ONUBAFRUIT	ANDALUCÍA	5	237	37	Vegetables, Fruits and Supplies.
8	SUCA	ANDALUCÍA	29	234	58	Supplies.
9	ACTEL	CATALUÑA	111	203	392	Cereals, Supplies, Fruits, Services, Olive Oil and Dried nuts.
10	JAENCOOP	ANDALUCÍA	11	169	31	Olive Oil.
			648	5.873	6.408	

➤ +7% Turnover regarding previous year

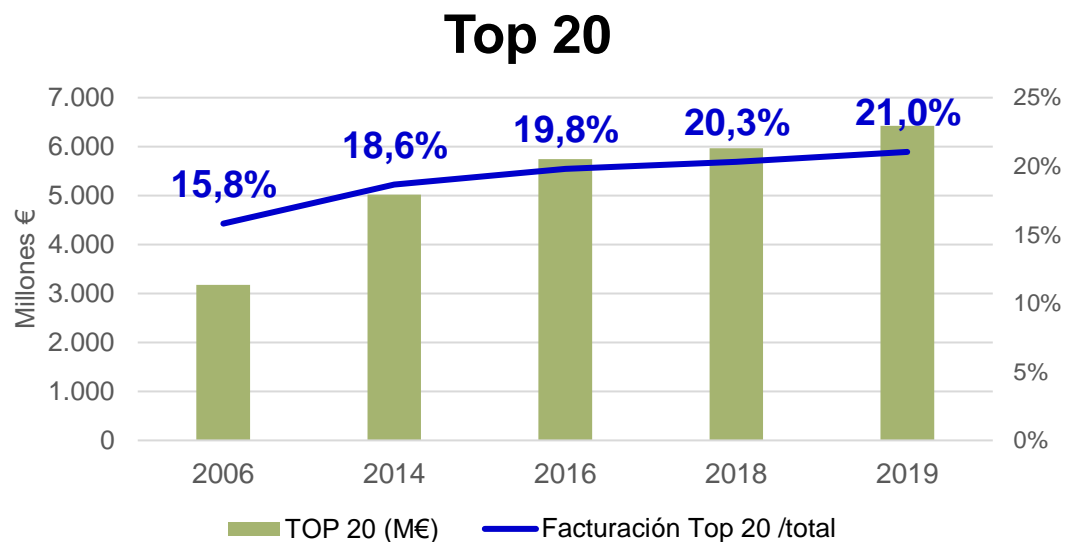
*Turnover 2019 including investee capital companies according % of share capital.
Source: "Annual Directory of Cooperatives 2020" (Cooperativas Agro-alimentarias de España).





13.4. Top Evolution

Top 20 (Turnover and weight on total turnover)



Increasing trend

Direct turnover, not including investee capital companies. Weight of 2nd degree coops based on the sample of surveyed coops.
Source: "Annual Directory of Cooperatives 2020 and previous" (Cooperativas Agro-alimentarias de España).





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