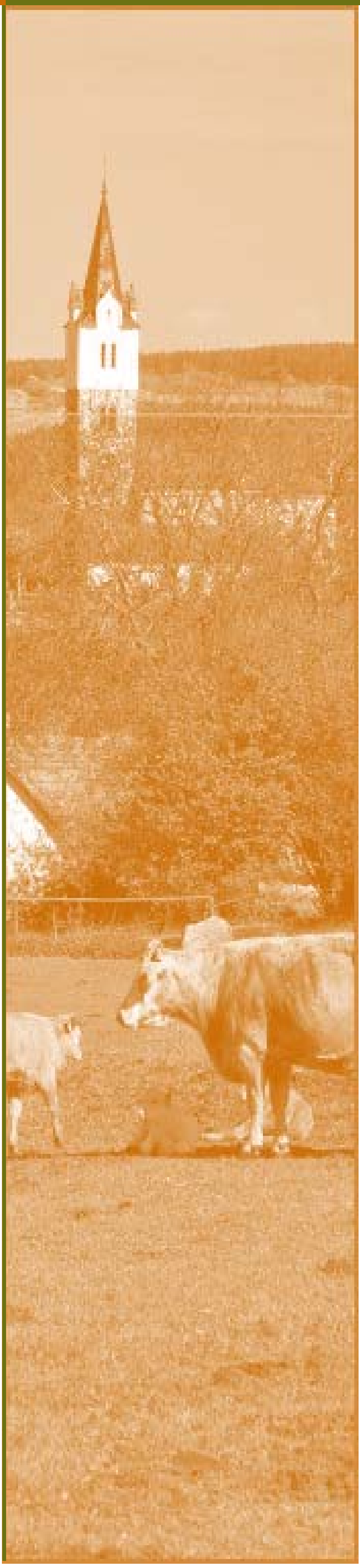
cogeca

european agri-cooperatives



Agricultural Cooperatives in Europe

Main Issues and Trends

Agricultural Cooperatives in Europe

Main Issues and Trends

Including a compendium
of Cogeca member organisations

Brussels, 15 September 2010

Further information about agricultural Cooperatives in Europe can be downloaded from the Cogeca web site: http://www.copa-cogeca.eu/ Cogeca

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Preface

European agriculture is clearly at a turning point. The discussions concerning the future reform of the CAP (post 2013), the absence of any agreement within the scope of the WTO negotiations, while instead bilateral agreements are advancing, the ongoing debates on the financial perspectives in the European Union and the continued expansion of the EU, represent challenges but also opportunities for our cooperatives and associated producers.

Hence, the importance for Cogeca to carry out a study which reflects the situation of agricultural cooperatives in each of the Member States and which highlights the view of cooperatives on issues they consider to be key to their development.

When I was appointed President of Cogeca, we approved a working programme that included a whole range of policy and organisational objectives to promote the entrepreneurial orientation of European agri-cooperatives. These included ensuring a greater presence at the institutions and proper recognition of the role played by cooperatives now and more especially in the future, in the strong belief that decisions taken within the EU impact heavily on co-operatives and must therefore take account of our needs and different realities and consider our interests.

In this context we decided to carry-out a study which would update the main quantity (statistical figures) as well as quality (issues and trends) markers reflecting the economic development of European cooperatives.

For this reason, the Copa-Cogeca Secretariat undertook the complex and laborious task to compile data and process questionnaire responses, which were far from been uniform in some Member States, in order to establish the best data base currently available on agricultural cooperation in the EU.

The results of the study highlight the importance of our cooperatives, in absolute and relative terms, while at the same time reflecting their many differences and the need for some Member States to step up their efforts, particularly the recent arrivals, where there is an urgent need for farmers to structure and organise themselves into cooperatives and producer organisations.

This study also shows that the most competitive farming can be found in the most market oriented Member States and sectors and in those areas where cooperatives pursue more entrepreneurial business strategies and value adding activities of concentration of supply and then processing and marketing. All of this is the proof that the viability of agriculture depends on the degree to which producers and their cooperatives are organised. In the future, faced with increasingly competitive markets and a greater diversification of customers' needs and preferences, cooperatives will become increasingly important for maintaining and developing agriculture.

This study is therefore an essential tool for understanding cooperatives, but also to prove to the EU institutions that the views and opinions of Cogeca must be taken into account, given that cooperatives are and will continue to be a fundamental part of European agriculture.

Finally, I would like to thank the national organisations and all those who have helped draw up this study, in particular the Cogeca Secretariat, without whom, none of this would have been possible.

Brussels, 15 September 2010

Paolo Bruni
President of Cogeca

Introduction

Cogeca has, in the past, produced publications on the situation of agricultural Cooperatives in the European Union either solely or jointly with NICE (The Netherlands Institute for Cooperative Entrepreneurship).

With this publication Cogeca intends to resume a regular publication of information concerning the situation of agricultural Cooperatives in Europe enabling its member organisations and the cooperative movement in general to follow the changes in the sector.

This edition dated September 2010 was prepared by the Secretariat on the basis of the contributions received by Cogeca member organisations following three specific questionnaires circulated during 2009.

In the first questionnaire Cogeca member organisations were asked to provide general information (e.g. name, contact details, etc.) and to illustrate their organisational structure along with some other details concerning their operation. On a subsequent questionnaire Cogeca members were asked to answer a set of questions aimed at identifying main recent issues and trends, in a number of topics, affecting Cooperatives in their own country. The answers collected to these two questionnaires constitute the fourth chapter of this publication.

The final questionnaire circulated to member organisations aimed at gaining statistical information on Cooperatives in each Member State.

For this specific purpose the information is divided in three main parts:

- **Global figures** on Cooperatives
- **Sector figures** on agricultural Cooperatives
- **Enterprise figures**, where each member organisation was asked to list the five biggest agricultural Cooperatives measured by turnover

The answers collected to this questionnaire were processed and are presented in chapter two and all individual answers are listed in the third chapter of this publication. No complete statistical information exists for the EU-27, but nevertheless 18 answers comprising both old and new EU Members.

The Secretariat wishes to express his most heartfelt thanks to all those that contributed to this publication and apologises for all the nagging involved in trying to get the required information on time.

Finally we wish you a good reading and may this publication contribute to a better understanding of agricultural Cooperatives in Europe.

The Secretariat

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Key to Abbreviations

CAP	Common Agricultural Policy
Cogeca	European Agri-Cooperatives
Copa	European Farmers
Council	Council of Ministers of the European Union
DG AGRI	Directorate General for Agriculture and Rural Development of the European Commission
EC	European Commission
EP	European Parliament
EU	European Union
EU-15	Total of the Member States of the European Union from 1995 – 2004 (April)
EU-25	Total of the Member States of the European Union from May 2004
EU-27	Total of the Member States of the European Union from January 2007
CC	Candidate Countries
NMS	Newer Member States (those who joined on 01.05.2004 and onwards)
EUROSTAT	Statistical Office of the European Communities
FAO	Food and Agriculture Organisation of the United Nations
GATT	General Agreement on Tariffs and Trade
ICA	International Cooperative Alliance
Cooperatives Europe	European region of ICA
IFAP	International Federation of Agricultural Producers
NICE	The Netherlands Institute for Cooperative Entrepreneurship
OECD	Organisation for Economic Cooperation and Development
WTO	World Trade Organisation
GVA	Gross Value Added in Agriculture
GDP	Gross Domestic Product

BE	Belgium	**ECU**	European Currency Unit
CZ	Czech Republic	**EUR or €**	Euro (from 01.01.2002)
DK	Denmark	**CZK**	Czech Crown
DE	Germany	**DKK**	Danish Crown
EE	Estonia	**EEK**	Estonian Crown
EL	Greece	**LVL**	Latvian Lat
ES	Spain	**LTL**	Lithuanian Litas
FR	France	**HUF**	Hungarian Forint
IE	Ireland	**PLN**	Polish Zloty
IT	Italy	**SEK**	Swedish Crown
CY	Cyprus	**GBP**	United Kingdom Pounds
LV	Latvia	**b€ or bEUR**	Billion Euro (thousand million)
LT	Lithuania	**bECU**	Billion ECU (thousand million)
LU	Luxemburg	**m€ or MEUR**	Million Euro
HU	Hungary	**mECU**	Million ECU
MT	Malta	**UAA**	Utilised Agricultural Area
NL	Netherlands	**ha**	hectare
AT	Austria	**('000 ha)**	Thousand hectares
PL	Poland	**Km²**	Square Kilometers
PT	Portugal	**('000)**	Thousands
SI	Slovenia	-	Nil
SK	Slovakia	**0**	Less than half a unit
FI	Finland	**0,000**	Less than half the unit considered
SE	Sweden	**:**	Not available
UK	United Kingdom	**#**	Uncertain
		p	Provisional
		*****	Estimate
		%	Percentage

I

Brief presentation of Cogeca

In this section:

History of Cogeca

Role and mission of modern Cooperatives

Cogeca's objectives and structure

Cogeca: A European organisation at the service of national cooperative organisations and their members

When the Treaty of Rome was signed on 25 March 1957, it already contained the most important framework provisions establishing the Common Agricultural Policy (CAP).

The relationship between the Community authorities and the representatives of the agricultural sector was left open by the Treaty, but the European Commission expressed its desire for close cooperation at an early stage and invited representatives of the national agricultural organizations to attend the 1958 Stresa Conference as observers.

Farmers themselves were convinced of the importance of the Community for their sector, and on 6 September 1958, the first European representative farmers' organisation, Copa (Committee of Professional Agricultural Organisations), was created.

One year later, on 24 September 1959, the national agricultural cooperative organizations decided, in The Hague, to create their European umbrella organisation – Cogeca (General Committee for Agricultural Cooperation in the European Union) – that also includes fisheries Cooperatives.

When Cogeca was created it was made up of 6 members. Currently, seven enlargements (of the EU) later, it has 36 full member organisations and 4 affiliated members in today's Europe of 27 Member States. In addition to that, Cogeca has another 36 partner members (including 10 coming from Non EU Member States).

In line with the latest European Union enlargements of 2004 and of 2007, Copa and Cogeca together are further reinforcing their position as Europe's strongest farming representative organisations. Copa and Cogeca have jointly welcomed, in total, 38 national farming and cooperative organisations from the newer Member States in total. Membership has thus risen to 76 organisations from all EU-27 countries.

Cogeca, now called "European agri-cooperatives", currently represents the general and specific interests of more than 38.000 farmers' cooperatives throughout an enlarged Europe.

Since its creation, Cogeca has been recognized by the European Institutions as the main representative body and indeed the spokesman for the entire agricultural and fisheries cooperative sector.

Fishing cooperatives are active in numerous areas, such as victualling, vessel management and insurances, the fish trade, as well as the marketing and processing of fish.

Maritime cooperation in Europe also includes cooperative ship-owners, whose main objective is still to help bring young people into the profession.

Cooperatives joint enterprises of Farmers as an Opportunity for the Future

Cooperatives came about in difficult economic and social circumstances in the 19th century. Farmers where gradually discovering that though joining forces, they could improve their access to markets and jointly finance vital complementary activities, namely: procurement, research, processing, marketing, distribution and promotion. Agri-cooperatives consist today the main stakeholders in the agri-food sector in all EU Member States and as well as other European countries.

Cooperatives are both associations of individual people and economic enterprises at one and the same time.

Cooperatives are the extension of the farming activity as they enable farmers to concentrate their power for the purpose of supplying inputs and material as well as of collecting processing and marketing the produce of members.

The activities of Cooperatives are founded on the principles of economic democracy, transparency and solidarity.

Agricultural Cooperatives play a vital role in the adjustment of the production of their members to the requirements of consumers and to improve their positioning in the marketplace.

Agricultural Cooperatives actively contribute to guarantee environmentally friendly quality products that are made available from the producer to the retailer.

Emanating from the “concern for the local community” cooperative principle, Agricultural cooperatives are important rural development operators. Hence they contribute actively to the economic viability in rural areas, including the less favoured regions. They are therefore an important source of direct and indirect employment and of economical growth, thus contributing to attain the goals of the EU 2020 Strategy.

Agricultural Cooperatives in the EU are an important socio-economic element in the economy and society at large: Over 50 % of share in the supply of agricultural inputs; Over 60 % of share in collection, processing and marketing of agricultural products.

Defending the food and business orientation of European Agriculture

Objectives

Cogeca enables agri- and fisheries cooperatives to have their political interests represented at a European level. To this end, it has five central objectives:

To represent the general and specific interests of European agri-cooperatives in discussions with EU institutions and other socio-economic organisations, contributing to policy-making,

To promote contacts and cooperation between agri-cooperatives in EU countries,

To undertake legal, economic, financial, social or other studies of concern to agricultural and fisheries cooperative enterprises,

To seek solutions which are of common interest, and

To maintain and develop relations with Copa and any other organisations working in the agricultural, economic or social fields at European and/or global level.

Cogeca as a lobby and a Platform for Inter-Cooperative Relationship

Cogeca participates in the shaping and further development of all Community policies which create important framework conditions for cooperative enterprises.

Cogeca also fosters co-operation between cooperative enterprises at European level.

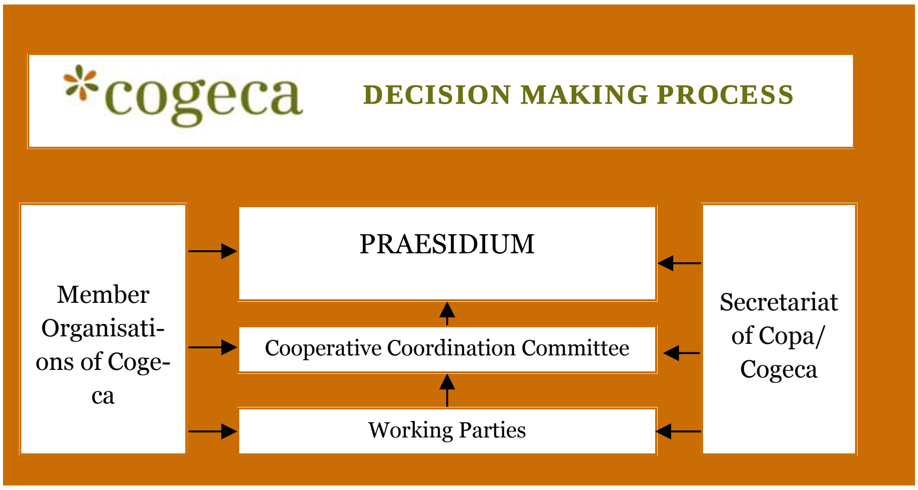
Cogeca Presidency Business Forum February 2009 (Brussels, Belgium): A Presidency Business Forum that adressed key policy issues and business strategies of European cooperatives in the fruit and vegetables sector with CEOs and leaders of relevant cooperatives.

From left to right: P. Vrisk, Vice President of Cogeca, H. Van ES, Chairman of the Fruit and vegetables Working Party, L. Peeters, Executive MoB, “Mechelse Veilingen”, E. Baamonde-Noche, Director General of “Cooperativas Agro-Alimentarias”, P. Bruni Vice President of Cogeca , G. Van Dijk President of Cogeca, A. Sanchez, CEO of “Conserve Italia”, J. Mir, Dep. Director General “ANECOOP”.

Decision making process of Cogeca

Praesidium

The Praesidium consists of representatives of the full members of Cogeca and it is the highest decision-making body. It examines and settles all matters which are in the scope of Cogeca' s objectives. Positions of the Praesidium are taken jointly with Copa whenever they concern the agricultural sector as a whole.



Presidency

The Praesidium elects from among its members a President and four Vice-Presidents for a three-year term of office. The Presidency of Cogeca and Copa together form a Coordination Committee which tries to reach an agreement as far as the common activities and positions of Cogeca and Copa are concerned.

Cooperative Coordination Committee

This group has the task of preparing the work of the Cogeca Praesidium. Its role is also to exchange information, to co-ordinate actions and to assure the follow-up of the decisions made by the Praesidium. It also co-ordinates with Copa the work of the joint Copa-Cogeca working parties.

Working Parties

Cogeca has some 50 Working Parties addressing either specific commodity sectors or general/horizontal questions. Most of these Working Parties are constituted jointly with Copa, but Cogeca and Copa may also have separate Working Parties.

Biannual Congress

The purpose of the biannual conference, which consists of representatives delegated by the full members, the affiliated and associated members and the partner organisations, is to inform the participants and to exchange views on relevant policy areas. It may also make proposals on the general policy of Cogeca.

Congress of European Farmers 2008: "Visions for the future of agricultural policy in Europe", 30 September – 01 October 2008 at the European Parliament in Brussels. The Congress was organised by Copa-Cogeca. More than 800 participants from 31 European Countries as well as international guests and speakers took part in the event.

Secretariat

Since 1962, the Secretariat has been operating jointly on behalf of Cogeca and Copa. It assures the smooth and efficient functioning of the two organisations and the implementation of decisions taken by the Praesidia of Cogeca and Copa. The Secretariat, made up of approximately 50 people from different nationalities, organizes some 300 meetings each year.

Founding and development

With each President serving initially a two-year, but lately changed to three year mandate the following people have served the organisation as Presidents: A. Hermes (DE), P. Martin (FR), A. Van Hulle (BE), A. Bettei (IT), C.R. Tybout (NL), R. Schubert (DE), J. Lequertier (FR), A. Van Hulle (BE), T.J. Maher (IE), M. Vetrone (IT), J. Arbuckle (UK), H. Nouyrit (FR), W. Croll (DE), M. Mioni (IT), E.W. Wilson (UK), W.R. Nagel (IE), J. Gaudinat (FR), J. Ewert (LU), O. Hakelius (SE), M. Campli (IT), M. Borgstrom (FI), E. Baamonde (ES), D. Cashman (IE), G.Van. Dijk (NL).

The current Presidency (2010-2012) consists of President P. Bruni (IT) assisted by four vice-presidents P. Vrisk (SI), C. Pees (FR), P. McLoughlin (IE), E. Baamonde (ES). T. Magnusson (SE) has been appointed as coordinator of Presidency Business Fora.

Cogeca's relationship with other European and international organisations

Cogeca participates actively in the work of the Coordinating Committee (EUCC), of "Cooperatives Europe", the European region of the International Cooperative Alliance - ICA created at its initiative in 1982, on the basis of a protocol of agreement and is officially recognised as spokesperson for all sectors of EU cooperatives.

At the same time Cogeca maintains close collaboration with representative organisations of cooperatives in other sectors such Cooperative Banking (EACB– European Association of Cooperative Banks and retailing (Eurocoop– European Community of Consumer Cooperatives).

II

Agricultural Cooperatives in Europe

In this section:

Main Areas of Concern

Trends and evolution of cooperatives in the EU

Main Statistical Indicators

1. Main Areas of Concern

Cooperative enterprises are a voluntary form of association of farmers, based on the cooperative principles, to strengthen their positioning in the market. On average agricultural Cooperatives represent over 50% of the agri-food business. Therefore, the main areas of concern for Cogeca are:

Promoting farmers and agri-cooperatives positioning in the food chain

General framework

Food chain issues have been in the centre of public scrutiny in the past years. Consequently high level political attention has been paid to a number of related issues at EU level. The Commission's Communication on "Food Prices in Europe", the EPs Declaration on "investigating and remedying the abuse of power by large supermarkets operating in the EU", the recommendations of the High Level Group on Competitiveness of the Agro-Food Chain, the EP report of "Food Prices in Europe", the recent Commission Communication "A better functioning food supply chain in Europe", and, last but not least, the Spanish Presidency conclusions on the Commission's Communication "A better functioning food supply chain in Europe".

Copa – Cogeca activities

Copa–Cogeca adopted, in April 2007, an "Action Plan: Rebalancing the power in the food chain" as a result of the internal discussions on market developments. This document still provides the framework for the political positioning and action of the European farmers and European agri-cooperatives.

The Copa–Cogeca thinking was highlighted in a seminar "Rebalancing the power in the food chain" already in May 2007. Participants to this seminar, farmers, cooperative leaders and representatives of the food and drinks industry and retailers pointed out that it was necessary to develop product diversification, reducing costs by increasing holding size, and investment in the food supply chain through marketing strategies.

Imbalances of power in the food chain

The sheer difference in economic size between farmers and retailers is caused by increased globalisation and by the concentration observed especially in the retail sector. Currently a handful of retailers are the trading partners of some 13.4 million farmers and 310 thousand food industry enterprises across the EU, leading to a relentless downward pressure on farm-gate prices.

Unfair and abusive trading and contractual practices and competition policy.

It is the use of this market power in commercial transactions along the food chain that leads to the appearance of unfair practices and abusive practices such as listing fees, over-riding discounts and below cost selling (amongst others), but in particular late payments.

To overcome these unfavorable structural conditions Cogeca is pursuing different political directions and actions, such as:

Promoting economic organisation of farmers (Cooperatives play a vital economic role by increasing their influence and negotiating power).

Pursuing appropriate agriculture legislation (compatible with *Competition law*) that will allow POs and cooperatives to play an enhanced role in the food chain

Stimulate *self-regulation* through adoption of codes of conduct and

A more transparent operation of the food supply chain would thus be the end result, through the

Creation of an *"European Food Trading Agency"*, the establishment of a *European Ombudsman*, and finally other complementary action foreseen in the context of the *High Level Group on Competitiveness of the Agro-Food Industry*

The Common Agricultural Policy after 2013 – the view of EU Farmers and Agri-Cooperatives

Every single person depends upon a well-functioning agriculture to ensure that they have access to secure and stable supplies of food, safe to eat and of good quality.

Citizens in Europe also place great importance on ensuring that food is produced in a way which protects our countryside, our environment, our animals and wildlife.

The market alone will not achieve these objectives. This is the role of the Common Agricultural Policy (CAP). Currently under 1% of total EU public expenditure finances measures under the two pillars of the CAP.

Looking to the future, the EU faces new challenges which put many of these benefits, particularly those provided under the first pillar of the CAP – food security and stability of supplies, sustainable production, employment and the economic viability of rural areas - at risk:

Market volatility is on the increase

EU farmers face an unlevel playing field on the market because of the EU's high and costly standards which imports do not have to meet

Low market prices and high costs are leading to a deterioration in farmers' incomes –farmers' incomes are only 50% of average earnings. The direct payment, which farmers receive under the CAP to pay for the benefits mentioned above, represent some two-thirds of farmers' income

Rising world demand for food combined with climate change means more risks to food security.

A strong CAP and the maintenance of its budget will therefore be more important than ever in future. A dynamic and competitive agricultural sector, which provides employment for over 28 million people, also has an indispensable role to play in the EU's new 2020 strategy for jobs and growth.

If agriculture is to play its full part in meeting the challenges facing the EU in the years to come, Copa and Cogeca consider that the main adjustments to the CAP should be focused on:

- Ensuring food security and stability by reinforcing the economic production role of farmers
- Enabling farmers to obtain a fair income from the market and contribute further to providing the wide-ranging economic, social and rural services valued by society
- Ensuring a level playing field for all EU farmers on the Single Market

To achieve this requires adjustments in the following areas:

- Better functioning of markets, more stable and more transparent
- Reinforcement of farmers' position in the food chain
- Measures to improve farmers' competitive position
- Maintenance of direct payments under pillar 1, but with a review of the mode of payment, directed to active farmers
- Maintenance of LFA payments and specific support to farmers in clearly defined cases
- More incentives to farmers to enable them to provide rural services valued by society
- Reinforcement of measures to enable farmers and cooperatives to play a positive role in meeting new challenges, notably climate change and water constraints
- More coherence between the CAP and other related policies.

Adjustments to the CAP post-2013 should reinforce the common nature of the policy, while taking into account the diversity of European agriculture. This requires financial solidarity, combined with an adequate budget and no widening of co-financing. Modulation between the two pillars of the CAP should also be eliminated.

International Trade (WTO) and bilateral trade agreements:

Cogeca is clearly in favour of multilateral trade agreements and the defence of the fair competition principle.

Local and regional economies face a high risk of collapse due to the insurmountable pressure on farmers' Cooperatives derived from the current trend for the liberalisation of markets.

Non trade concerns in particular Geographical Indications and intellectual property rights are of relevance for agricultural Cooperatives.

In the framework of the ongoing negotiations, the Commission and the Council must assure the reformed European agricultural policy and pay close attention to these aspects in particular guaranteeing a balance between the three pillars (market access, export competition and internal support).

Business environment:

Concentration in the retail sector and input suppliers asks for an adequate response from agri-food Cooperatives. Current legislation and trade practices do not provide a level playing field with other business forms.

Trans-regional and transnational co-operation could provide an appropriate toolbox to tackle these challenges namely through the implementation of the statute of the European Cooperative Society.

The specific needs of Cooperatives should be taken into account in the various pieces of legislation, with particular emphasis in the accounting and banking sectors.

Member States implementing legislation affecting the cooperative sector (e.g. the Regulation on the Statute for a European Cooperative Society, the Competition Law and the International Accounting Standards) have a considerable degree of freedom. Cogeca and its national cooperative member organisations are actively pursuing alternative solutions, combining the national cooperative traditions and the foundations of the single market.

Challenges in the newer Member States:

The recent EU enlargement has highlighted specific needs of the cooperative sector in the new Member States.

Both political and technical constraints impair an appropriate development of Cooperatives.

Decision-makers at EU level must ensure the creation of the appropriate conditions for the development of farmers' partnerships throughout an enlarged EU.

2. Trends and evolution of agri-cooperatives in the EU

The variability of agri– cooperatives in the EU is significant and Cooperatives in the North of Europe have achieved a higher lever of integration as compared to some Meridional regions of Europe.

The prevalence of small scale (lack of high degree of concentration) of Cooperatives in the South of Europe is due, amongst other factors, to a higher resistance of members and local entities to mergers, despite the recent trend to reduce the number of Cooperatives and increasing business volumes.

Simultaneously, Cooperatives are developing services provided to their members as well as diversifying their activities aiming at covering emerging business opportunities in rural areas.

This trend is particularly more visible in the most specialised activities (phitossanitary, animal and crop selection, animal feed) with the aim to increasing production efficiency and providing members with an increased quality of life – an aspect not to be underestimated in the context of intergenerational renewal.

Challenges faced by Cooperatives have led in the recent past, and will continue to do so, to transnational co-operation as a tool to overcome difficulties derived from the absence of a level playing field in the market.

However many are still the constraints hindering an appropriate development of transnational co-operation: legislation, taxation, accounting standards and access to financing.

The future passes also by the promotion and development of transnational alliances between Cooperatives for the benefit of their members and an increasingly competitive European agriculture as a credible alternative to multinational companies.

3. Main Statistical Indicators

Before the presentation of a set of tables on agricultural Cooperatives at EU level, tables 1 and 2 provide some general information, respectively for years 2007 and 2003.

Table 1: GENERAL STATISTICS IN THE EU-27, YEAR 2008.

	Total Area (Km²)	**Population** ('000 inhabitants)	**Number of holdings** (1000 holdings) 2007	**UAA per holding** (ha) 2007	**Employment in agriculture** (%)[b]	**GVA/ GDP** (%)
EU-27	4 325 248	497 645	13 700	12,6	5,4	1,2
EU-25	3 975 855	468 477	9 276	16,8	4,3	1,2
EU-15	3 237 282	394 345	5 662	22,0	3,4	1,1
Belgium	30 528	10 667	48	28,6	1,8	0,6
Bulgaria	111 002	7 640	493	6,2	7,5	5,5
Czech Republic	78 867	10 381	39	89,3	3,3	0,7
Denmark	43 098	5 476	45	59,7	2,8	0,7
Germany (Deutschland)	357 104	82 218	371	45,7	2,2	0,6
Estonia	45 227	1 341	23	38,9	3,9	1,4
Ireland (Eire)	70 285	4 401	128	32,3	5,7	0,9
Greece (Elláda)	131 957	11 214	860	4,7	11,4	2,5
Spain (España)	505 365	45 283	1 044	23,8	4,3	2,2
France	549 087	63 983	527	52,1	3,1	1,4
Italy	301 323	59 619	1 679	7,6	3,8	1,7
Cyprus (kypros/ Kibris)	9 251	789	40	3,6	4,3	1,7
Latvia	64 589	2 271	108	16,5	7,9	1,3
Lithuania	65 300	3 366	230	11,5	7,9	2,3
Luxemburg	2 586	448	2	56,8	1,8	0,3
Hungary (Magyarország)	93 034	10 045	626	6,8	4,5	2,5
Malta	316	410	11	0,9	2,0	1,0
Netherlands	37 354	16 405	77	24,9	2,8	1,3
Austria (Österreich)	83 870	8 319	165	19,3	5,6	1,0
Poland	312 679	38 116	2 391	6,5	14,0	2,2
Portugal	91 909	10 618	275	12,6	11,5	1,3
Romania	238 391	21 529	3 931	3,5	28,8	6,0
Slovenia	20 273	2 010	75	6,5	8,6	1,1
Slovakia	49 036	5 401	69	28,1	4,0	1,0
Finland (Suomi)	338 420	5 300	68	33,6	4,6	0,6
Sweden	450 295	9 183	73	42,9	2,1	0,4
United Kingdom	244 101	61 176	300	53,8	1,4	0,5

Source: "Agriculture in the European Union: Statistical and economic information 2008; European Commission, 2009;

UAA – Utilised Agricultural Area.GVA/GDP – Contribution of the Agricultural Gross Value Added to the Gross Domestic Product expressed in percentage.

Table 2: GENERAL STATISTICS IN THE EU-25, YEAR 2003.

	Total Area (Km²)	Population ('000 inhabitants)	UAA ('000 ha)	UAA per holding (ha)	Employment in agriculture (%)[b]	GVA/GDP (%)
EU-25	3.973.200	453.683	163.479*	:	5,2	1,6
EU-15	3.234.627	379.483	130.004*	:	4,0	1,6
NMS	738.573	74.200	33.475*	:	:	:
Belgium	30.528	10.356	1.392	25,4	1,7	1,0
Czech Republic	78.865	10.203	3.674	66,9	4,5	1,1
Denmark	43.098	5.384	2.641	54,7	3,3	1,6
Germany	357.031	82.537	17.008	41,2	2,4	0,7
Estonia	45.227	1.356	796	21,6	6,3	2,2
Greece	131.957	11.018	3.897[a]	:	16,3	5,4
Spain	504.880	40.683	25.270	:	5,6	3,6
France	549.087	59.629	29.430	45,3	4,3	2,0
Ireland	70.295	3.964	4.370	32,3	6,4	1,9
Italy	301.336	57.321	15.097	:	4,7	2,2
Cyprus	9.251	715	136	3,5	5,2	3,7
Latvia	64.589	2.332	1.582	10,2	14,6	2,1
Lithuania	65.300	3.463	2.531	9,1	18,7	2,6
Luxemburg	2.586	448	128	52,3	2,4	0,5
Hungary	93.034	10.142	5.865	5,6	5,4	2,7
Malta	316	397	11	1,0	2,5	1,6
Netherlands	35.525	16.193	1.924[a]	23,5	2,7	2,0
Austria	83.858	8.067	3.374	:	5,5	1,2
Poland	312.685	38.219	16.136	7,0	18,2	2,3
Portugal	91.909	10.408	3.745	:	12,8	2,5
Slovenia	20.273	1.995	509	6,3	8,4	1,6
Slovakia	49.034	5.379	2.236	29,8	6,0	1,2
Finland	338.140	5.206	2.246	29,9	5,3	1,0
Sweden	450.295	8.941	3.129	46,1	2,5	0,6
United Kingdom	244.101	58.329	16.352[a]	57,4	1,2	0,7

Source: "Agriculture in the European Union: Statistical and economic information 2003; European Commission, 2004;

Estimate; : - data not available;
a – data from 1988;
f – Employment in agriculture, forestry, hunting and fishing sector, expressed as the share in employed civilian working population (%)
UAA – Utilised Agricultural Area.GVA/GDP – Contribution of the Agricultural Gross Value Added to the Gross Domestic Product expressed in percentage.

Top Cooperatives in the EU

The underlying objective of the presentation of the same set of data for two different time periods, is to remind the reader of some main agricultural indicators, to better understand the changes occurred in the cooperative sector between 2003 and 2008.

Statistical information on agricultural Cooperatives and Cooperatives from other sectors of the economy are very scarce, a fact that was clearly recognised by the European Commission in its Communication on the Promotion of Cooperative Societies "*Another problem which contributes to the incomplete understanding of the potential of the cooperative enterprise is the poor data concerning its quantitative importance and trends in its development*".

This was clearly illustrated by the answers from Cogeca member organisations that provided (some only partial) information for only 16 out of the total 27 Member States of the European Union.

This difficulty, and in many cases absence, of statistical information on agricultural Cooperatives makes it harder for cooperative leaders to fundament their decisions and demands and decision makers to assess the likely impact of policies affecting the cooperative sector.

Nevertheless Cogeca with a significant effort and the active participation of its member organisations presents in the following pages a series of tables created listing top European Cooperatives, based on turnover .

In order to better illustrate the changes occurred in the agricultural cooperative sector, tables 3 and 4 list the top 25 Cooperatives, in Europe, per turnover in 2008 and in 2003 respectively.

A changing Common Agricultural Policy, along with an increasingly globalised economy has led farmers and their Cooperatives to adjustments necessary to achieve a better positioning in the markets and for an increase in competitiveness.

The most striking aspect is the increase of turnover volume in the top Cooperatives which can be explained as the result of concentration, development of higher value added products, improved market positioning and overall strategy.

Very simply: Bigger Cooperatives are becoming bigger through either organic growth ("Greenfield" investments) or, more often, through a concentration process (mergers and/or acquisitions partnerships, etc.) on a first step at national level and then at a later stage on a transnational level.

Nevertheless differences exist in Cooperatives throughout the EU-27 and the most evident difference is their size and organisation. Whilst Cooperatives in Northern Europe tend, in their concentration process, to favour full merger of entities, in other parts of Meridional Europe this process is achieved through the creation of second and/or third degree ("federated") Cooperatives.

Tables 5 to 11 present a list of the biggest Cooperatives at European level in some of the main sectors of activity.

Table 3: TOP 25 AGRICULTURAL COOPERATIVES IN 2008 (Indicator: turnover)

	Name	Country	Activity / Sector	Turnover (billion €)	Farmer - members ('000)	Employees ('000)
1	FrieslandCampina	NL	Dairy	9,481	15,837	20,568
2	Bay Wa	DE	Supplies	8,795	:	15,540 (2003)
3	VION*, Son en Breugel	NL	Meat	8,540	:	35,583
4	Metsäliitto	FI	Forestry	6,434	129,270	17,540
5	Arla Foods (2009)	DK-SE	Dairy	6,200	7,625	16,200
6	Danish Crown (2009)	DK	Meat	6,000	10,700	23,500
7	AGRAVIS	DE	Supplies	5,811	:	4,000 (2003)
8	Union IN VIVO	FR	Cereals, Supplies	5,200	:	1,500
9	KERRY	IE	Dairy	4,700	9,700	22,300
10	DLG	DK	Supplies	4,600	28,000	5,000
11	FloraHolland	NL	Horticulture (flowers, plants)	4,074	5,124	3,555
12	TERRENA	FR	Multipurpose	3,900	27,500	9,900
13	TEREOS	FR	Sugar	3,800	9,500	9,000
14	Lantmännen	SE	Cereals, Feedingstuffs	3,656	37,000	10,500
15	SODIAAL	FR	Dairy	2,746	13,000	7,700
16	Nordmilch	DE	Dairy	2,500	7,989	7,989
17	DLA (Den Lokale Andel)	DK	Supplies	2,450	20,000	2,300
18	Agricola Tre Valli	IT	Meat, feedingstuffs	2,332	:	:
19	Humana Milchunion	DE	Dairy	2,200	5,000	5,000
20	GLANBIA	IE	Dairy	2,200	18,600	4,900
21	RWZ Rhein-Main	DE	Supplies	2,119	:	:
22	Irish Dairy Board	IE	Dairy	2,110	0,070	3,788
23	Westfleisch	DE	Meat	2,008	:	:
24	RWA	AT	Supplies	2,000	122,000	13,000
25	Coopagri	FR	Multipurpose	1,950	:	:

Notes:
: - Data not available

Table 4: TOP 25 AGRICULTURAL COOPERATIVES IN 2003 (Indicator: turnover)

	Name	Country	Activity / Sector	Turnover (billion €)	Farmer - members ('000)	Employees ('000)
1	Metsäliitto(1)	FI	Forestry	8,300	131,000	29,000
2	Bay Wa	DE	Supplies	5,891	:	15,540
3	Arla Foods	DK-SE	Dairy	5,460	6,600	7,000
4	Danish Crown	DK	Meats	5,420	19,700	18,000
5	Friesland Coberco Dairy Foods	NL	Dairy	4,575	11,000	18,005
6	KERRY	IE	Dairy	3,693	9,700	15,003
7	Campina	NL	Dairy	3,655	9,084	6,940
8	AGRAVIS	DE	Supplies	3,380	:	4,000
9	Svenska Lantmänem	SE	Cereals, Feed-ingstuffs	3,100	52,000	11,000
10	TERRENA	FR	Supplies	2,973	27,500	9,900
11	Union IN VIVO	FR	Cereals, Supplies	2,727	:	1,500
12	Humana Milchunion	DE	Dairy	2,444	:	3,000
13	Nordmilch	DE	Dairy	2,226	11,748	4,211
14	GLANBIA	IE	Dairy	2,110	18,663	6,963
15	SOCOPA	FR	Meats (Beef)	1,930	:	6,100
16	FloraHolland	NL	Horticulture	1,919	3,996	2,287
17	DLG	DK	Supplies	1,880	23,500	2,000
18	SODIAAL	FR	Dairy	1,870	13,000	7,700
19	Irish Dairy Board	IE	Dairy	1,791	0,070	2,903
20	TEREOS	FR	Sugar	1,729	9,500	9,000
21	Valio-group	FI	Dairy	1,600	14,000	4,500
22	Bloemenveiling Aalsmeer	NL	Horticulture	1,598	3,245	1,848
23	The Greenery	NL	Horticulture	1,570	4,150	2,083
24	RWZ Rhein-Main	DE	Supplies	1,543	:	2,710
25	RWA	AT	Supplies	1,530	:	1,388

Source: "Agricultural Cooperatives in the European Union – Trends and Issues on the eve of the 21st Century"; 1997,(p. 29-30)

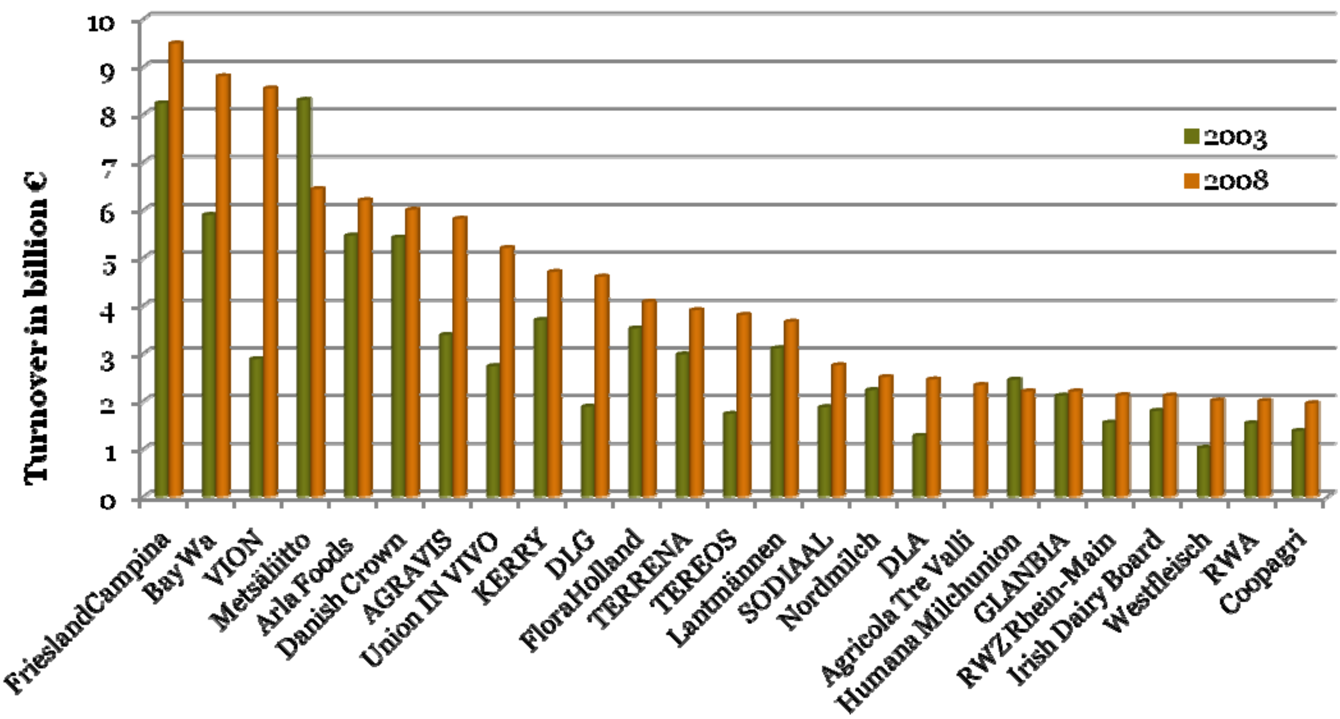
Notes:

: - Data not available

(1) - Data from 1996

Evolution of top 25 European Agri-cooperatives 2003 – 2008

(average composite growth of turnover : 38%)



Top Cooperatives in the EU 2008 per sector of activity

Table 5: Top dairy sector cooperatives in 2008 (by turnover, in billion €)

Name	Country	Activity / Sector	Turnover (billion €)	Farmer members ('000)	Employees ('000)
FrieslandCampina	NL	Dairy	9,481	15,837	20568
Arla Foods(2009)	DK-SE	Dairy	6,200	7,625	16,200
KERRY	IE	Dairy	4,700	9,700	22,300
SODIAAL	FR	Dairy	2,746	13,000	7,700
Nordmilch	DE	Dairy	2,500	7,989	7,989
Humana Milchunion	DE	Dairy	2,200	5,000	5,000
GLANBIA	IE	Dairy	2,200	18,600	4,900
Irish Dairy Board	IE	Dairy	2,110	0,070	3,788
Valio	FI	Dairy	1,844	10,250	4,350
Hochwald Nahrungsmittel-werke	DE	Dairy	1,000	10,500	1,600

Notes: : - Data not available

Evolution of top Dairy Cooperatives 2003-2008

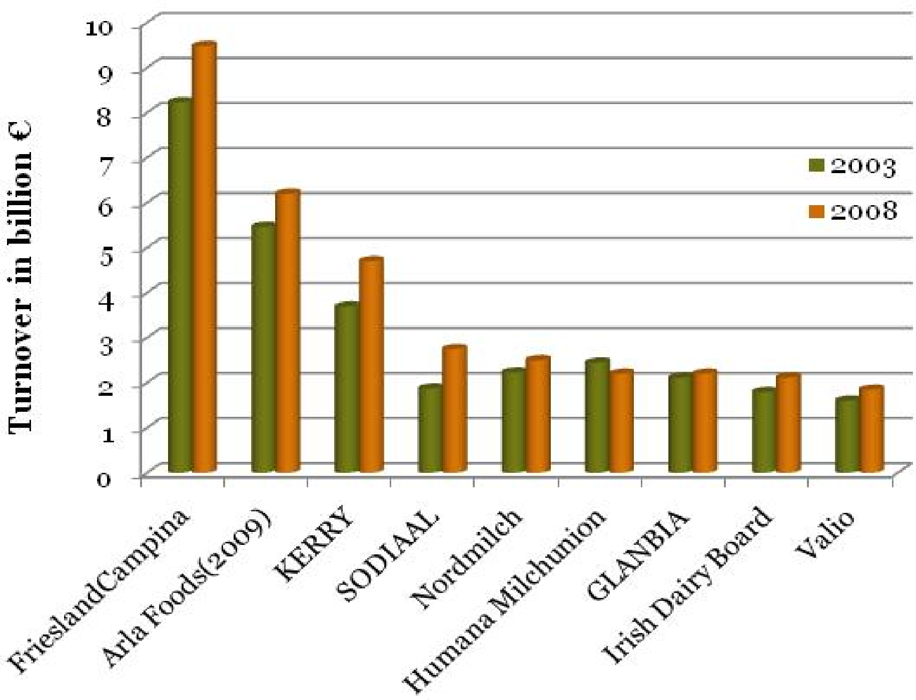


Table 5: Top meat sector cooperatives in 2008 (by turnover, in billion €)

Name	Country	Activity / Sector	Turnover (billion €)	Farmer members ('000)	Employees ('000)
VION*, Son en Breugel	NL	Meat	8,540	:	35,583
Danish Crown(2009)	DK	Meat	6,000	10,700	23,500
HK SCAN	FI	Meat	2,295	2,290	7,420
Westfleisch	DE	Meat	2,008	:	:
Cooperl Arc Atlantique	FI	Meat	1,700	:	:
Atria-group	FI	Meat	1,357	8,480	6,140
COREN	ES	Meat, feed-ingstuffs	0,966	6,000	3,844
UNIPEG	IT	Meat	0,394	1,172	0,277

Notes: : - Data not available

In comparison with the 2003 Table of the top 10 cooperatives in the meat sector, it has to be noted that in 2006 Sudfleisch had been acquired by VION, and similarly the Swedish meat group is now part of the HK SCAN group.

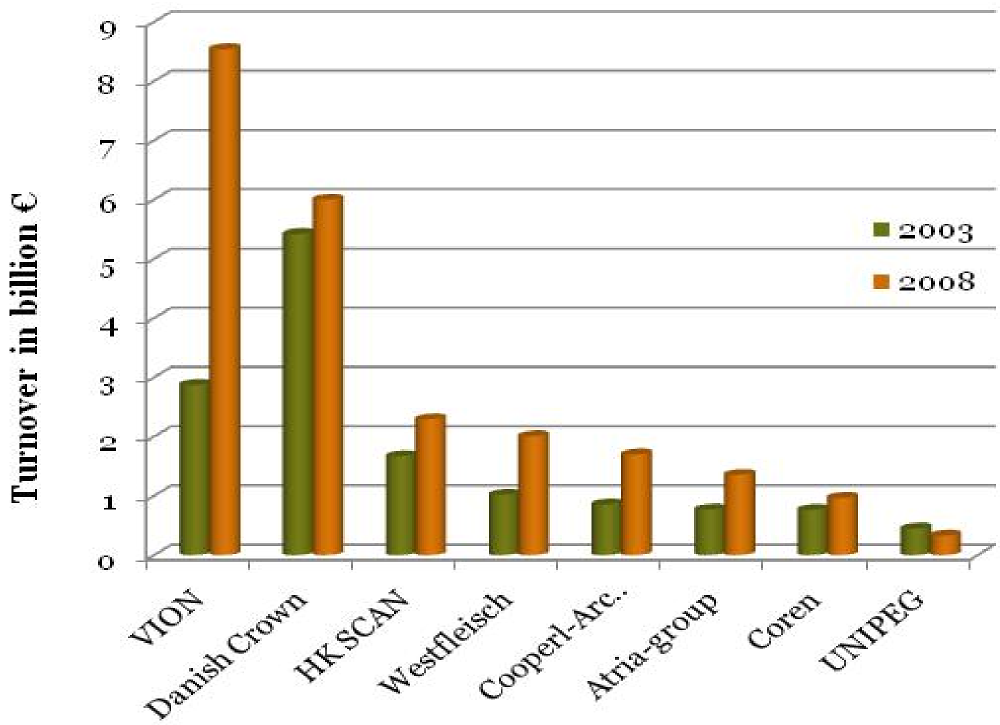


Table 7: Top Supplies sector cooperatives in 2008
(by turnover, in billion €)

Name	Country	Activity / Sector	Turnover (billion €)	Farmer members ('000)	Employees ('000)
Bay Wa	DE	Supplies	8,795	:	15,540(2003)
AGRAVIS	DE	Supplies	5,811	:	4,000(2003)
Union IN VIVO	FR	Cereals, Supplies	5,200	:	1,500
DLG	DK	Supplies	4,600	28,000	5,000
DLA (Den Lokale Andel)	DK	Supplies	2,450	20,000	2,300
RWZ Rhein-Main	DE	Supplies	2,119	:	:
RWA	AT	Supplies	2,000	122,000	13,000
Champagne Céréales	FR	Cereals, Supplies	1 828	:	:
Epis-Centre	FR	Cereals, Supplies	1,771	:	:

Notes: : - Data not available

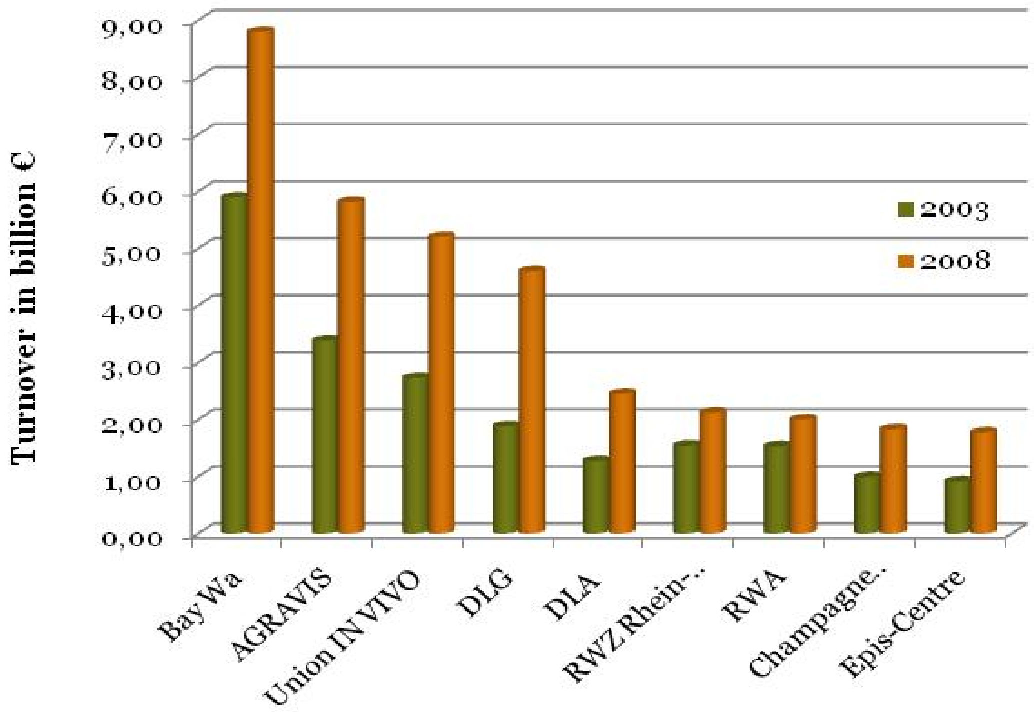


Table 8: Top Multipurpose sector cooperatives in 2008
(by turnover, in billion €)

Name	Country	Activity / Sector	Turnover (billion €)	Farmer members ('000)	Employees ('000)
TERRENA	FR	Multipurpose	3,900	27,500	9,900
Coopagri Bretagne	FR	Multipurpose	1,950	18,000	4,600
AGRIAL	FR	Multipurpose	1, 910	:	:
CECAB	FR	Multipurpose	1,300	:	4,800
Cosun	NL	Sugar, potatoes, processed products	1,689	10,896	4,266
UNICopa	FR	Multipurpose	1,312	:	:
EURALIS	FR	Multipurpose	1,289	:	:
Agrifirm	NL	Crops, eggs & poultry, live-stock	0,916	15,000	1,055
AVEVE(2003)	BE	Multipurpose	0,883	25,000	1,600(2009)
Avebe	NL	Starch, processed products	0,653	3,457	1,397

Notes: : - Data not available

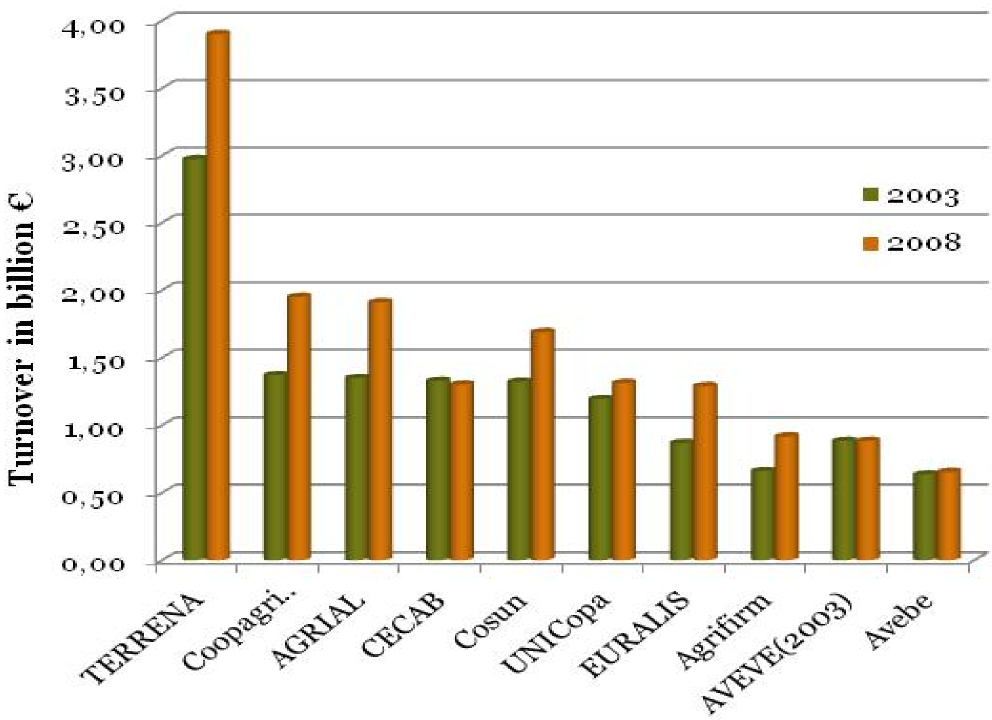


Table 9: Top Horticulture sector cooperatives (including fruit, vegetables, flowers and plants), in 2008 (by turnover, in billion €)

Name	Country	Activity / Sector	Turnover (billion €)	Farmer members ('000)	Employees ('000)
FloraHolland	NL	Flowers, plants	4,074	5,124	3,555
The Greenery	NL	Vegetables	1,308	1,150	1661
Landgard	DE	Fruit, vegetables & plants	1,269	4,000	2,500
Conserve Italia - Consorzio Cooperativo	IT	Fruit & Vegetables	0,963	17,500(2003)	6,000(2003)
Apoconerpo	IT	Fruit & Vegetables	0,522	9,850	:
ANECOOP	ES	Fruit	0, 412	135,000	0,176
FresQ, De Lier	NL	Vegetables	0,393	:	:
CNB	NL	Flower bulbs	0,318	1,700	0,133
Fruitmasters	NL	Fruit	0,295	0,554	0,357
Agrintesa	IT	Fruit & Vegetables	0,250	:	:
Consorzio Melinda	IT	Fruit & Vegetables	0,244	:	:

Notes: : - Data not available

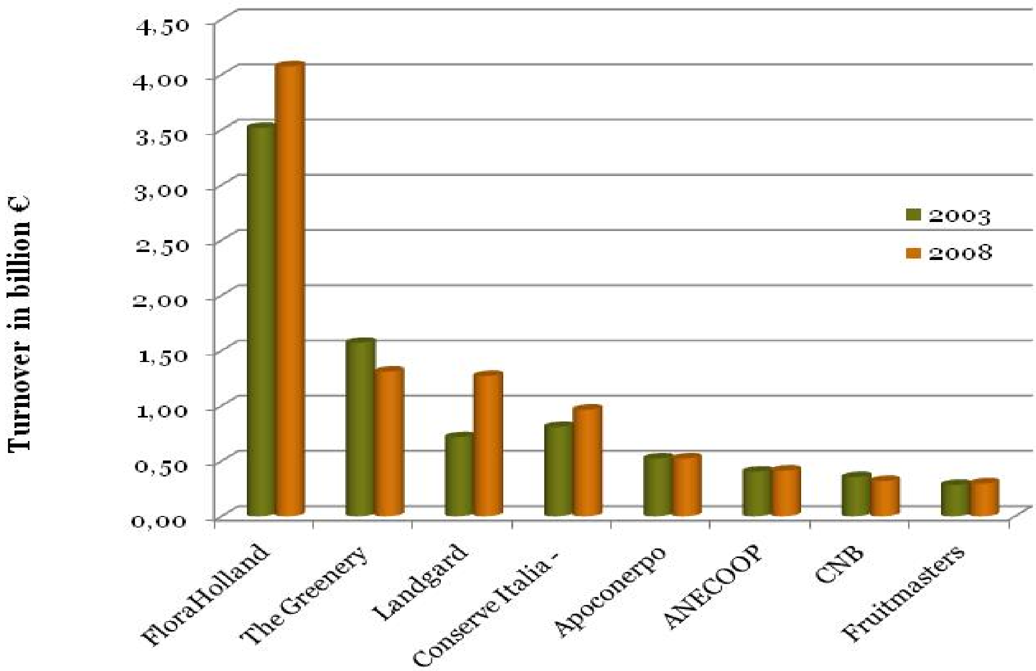


Table 10: Top wine sector cooperatives in 2008 (by turnover, in billion €)

Name	Country	Activity / Sector	Turnover (billion €)	Farmer members ('000)	Employees ('000)
Grupo Italiano Vini	IT	Wine	0,288	:	0,930
CAVIRO	IT	Wine	0,230 (2003)	25,000	0,350
CAVIT	IT	Wine	0,226 (2003)	5,400	:
Centre vinicole Champagne Nicolas Feuillatte	FR	(Champagne &) Wine	0,193 (2009)	0,500 (80 coops)	:
Blasons de Bourgogne	FR	Wine	0,113 (2009)	:	:
CANTINE RIUNITE & CIV	IT	Wine	0,095	1,063	0,339
WZG- Württembergische Weingärtner – Zentralge-nossenschaften	DE	Wine	0,079 (2003)	0,071	0,158
Cantina de Soave	IT	Wine	0,076 (2003)	1,700	:
Mezzacorona	IT	Wine	0,070 (2003)	:	:
Badischer Winzerkeller	DE	Wine	0,050	6,000	0,280

Notes: : - Data not available

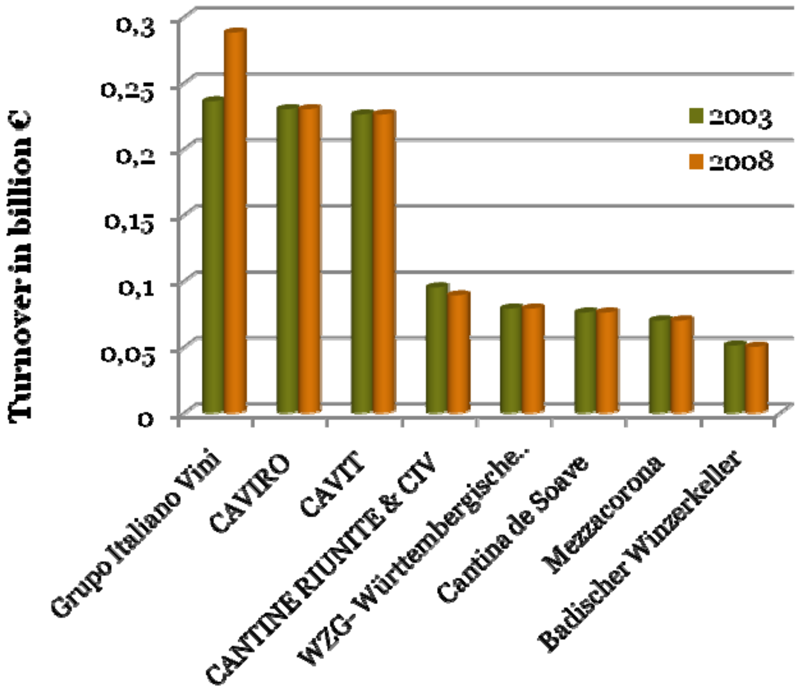
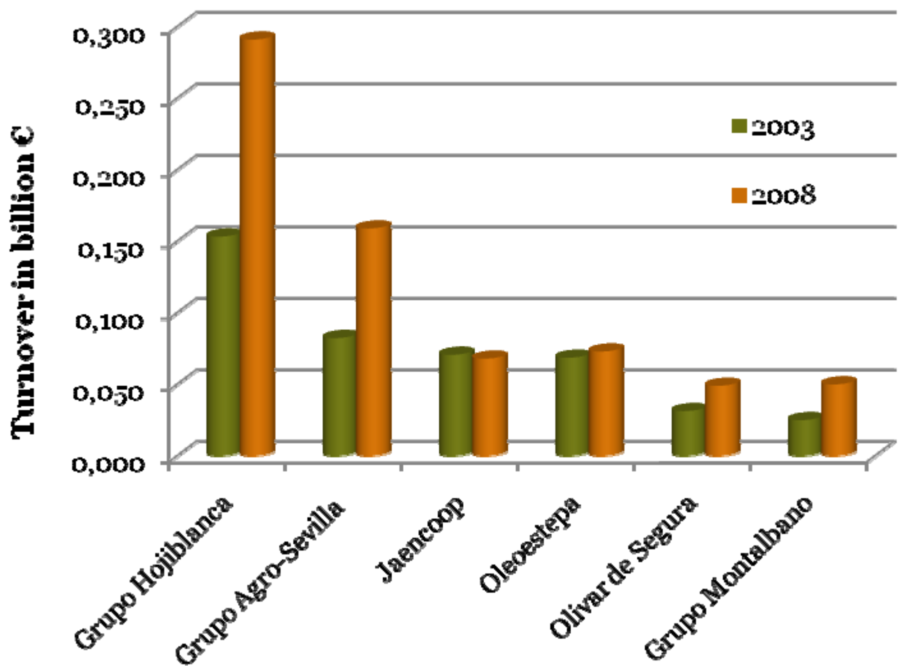


Table 11: Top olive oil sector cooperatives in 2008

(by turnover, in billion €)

Name	Country	Activity / Sector	Turnover (billion €)	Farmer members ('000)	Employees ('000)
Coop Hojiblanca	ES	Olives & Olive oil	0,291	:	:
Coop Agro Sevilla	ES	Olives & Olive oil	0,159	:	:
Coop JaenCoop	ES	Olives & Olive oil	0,068	:	:
Coop Oleoestepa	ES	Olives & Olive oil	0,073	:	:
MONTALBANO GROUP	IT	Olive oil	0,050	2,229	37
Olivar de Segura	ES	Olives & Olive oil	0,049	:	:
Unión de Úbeda	ES	Olives & Olive oil	0,020	:	:
Nª Sra de las Virtudes	ES	Olives & Olive oil	0,022	:	:
Almazaras de la Subbetica	ES	Olives & Olive oil	0,020	:	:
Coop. ACENORCA	ES	Olives & Olive oil	0,019	:	:

Notes: : - Data not available



III

Statistical Data on Agricultural Cooperatives per EU Member State

In this section:

General data

Sectoral Data

Biggest agricultural cooperatives

Czech Republic

Table 12: GENERAL DATA ON AGRICULTURAL COOPERATIVES IN THE CZECH REPUBLIC

	1998	2000	2003	2006
Number of Farmers ('000)	204,2	164,9	136,0	134,0
Number of Cooperatives	798	723	686	596
Farmers members of at least one Cooperative (%)	85	81	73	55,70
Number of members ('000) (including membership in several Cooperatives)	235,00	38,21	54,81	:

Source: AGRICULTURAL ASSOCIATION OF THE CZECH REPUBLIC / ZEMĚDĚLSKÝ SVAZ ČESKÉ REPUBLIKY
Notes: : - Data not available

Table 13: DATA RELATING TO ENTERPRISES: BIGGEST AGRICULTURAL COOPERATIVES IN THE CZECH REPUBLIC, YEAR: 2008 (*)

Name of Cooperative	Sector/Activity	Turnover (billion €)	Market Share (%)	Farmers Members ('000)	Salaried Workers ('000)
Mlecoop	Dairy	0,223	:	0,02	:
Agropork	Beef & pigmeat	0,139	:	0,19	:
Agrodruztvo Jevisovice	Poultry	0,180	:	0,34	:
CZ Fruit	Fruit & Vegetables	0,150	:	0,06	:
Solana	Potatoes	0,003	:	0,04	:

Source: AGRICULTURAL ASSOCIATION OF THE CZECH REPUBLIC / ZEMĚDĚLSKÝ SVAZ ČESKÉ REPUBLIKY
Notes: (*) Unless otherwise stated; : - Data not available

Denmark

Table 14: DATA RELATING TO ENTERPRISES: BIGGEST AGRICULTURAL COOPERATIVES IN DENMARK, YEAR: 2009 (*)

Name of Cooperative	Sector/ Activity	Turnover (billion €)	Market Share (%)	Farmers Members ('000)	Salaried Workers ('000)
Arla Foods	Dairy	6,200	93	7,625	16,2
Danish Crown	Meat	6,000	84	10,700	23,5
DLG	Feed compounds	4,600	41	28,000	5,0
DLA-Agro	Feed compounds	2,450	35	20,000	2,300
Kopenhagen Fur	Fur	0,670	99	1,892	0,340
TICAN	Pork meat	0,500	:	0,400	1,800
DLF Trifolium	Grass Seeds	0,280	:	5,400	0,682
DANAEG	Eggs	0,130	:	<100	0,303
Daka bio-industries	Fertilizer & Energy	0,120	:	0,016	0,306
Gasa Nordgrønt	Sales of vegetables	0,090	:	0,070	:
KMC	Potato starch	0,090 (2008)	:	1,500	0,246 (2008)

Source: DANISH AGRICULTURAL and FOOD COUNCIL / Landbrug & Fødevarer
: - Data not available

Germany

Table 15: GENERAL DATA ON AGRICULTURAL COOPERATIVES IN GERMANY

	1998	2003	2006	2008
Number of Farmers ('000)	994,0	388,1	353,3	349,0*
Number of Cooperatives	4.221	3.286	3.188	2.994
Number of members ('000) (including membership in several Cooperatives)	2.964,00	2.405,000	2.147,000	1.807,000
Number of salaried workers ('000)	140,90	115,405	104,440	101,500
Turnover (billion €)	37,70	35,3	36,5	44,5

Source: GERMAN RAIFFEISEN ASSOCIATION / DEUTSCHER RAIFFEISENVERBAND

	Agricultural Cooperatives (N°)		Market Share (%)		Farmer Members ('000)		Turnover (billion €)		Salaried Workers ('000)	
	2003	2008	2003	2008	2003	2008	2003	2008	2003	2008
General (Multipurpose (1), incl. supplies)	712	541	54,0	54,0	1.749,0	1.232,0	16,50	22,90 0	52,8	47,0
Milk & Dairy	353	290	68,0	70,0	140,0	108,0	9,800	10,800	11,9	10,4
Beef & Cattle(2) & Pigmeat (2)	134	116	35,0	28,0	239,0	215,0	4,600	4,800	9,9	3,0
Wine	239	218	32,0	30,0	58,0	51,0	0,800	0,800	3,3	3,3
Fruit & Vegetables	117	94	45,0	50,0	40,0	29,0	1,700	2,500	3,9	4,9
Other	980	863	:	:	144,0	131,0	0,600	0,700	11,6	10,6
Agricultural Cooperatives (3)	751	872	:	:	36,0	41,0	1,300	2,000	22,0	23,1

Source: GERMAN RAIFFEISEN ASSOCIATION / DEUTSCHER RAIFFEISENVERBAND

Notes:
(*) - provisional figures; (1) - incl. cereals, animal feed ; (2) – beef & cattle and pigmeat as well as rearing ; (3) - Primary agricultural production in the new "Länder"

: - Data not available

TABLE 16: SECTORAL DATA ON AGRICULTURAL COOPERATIVES IN GERMANY

Germany

Table 17: DATA RELATING TO ENTERPRISES: BIGGEST AGRICULTURAL COOPERATIVES IN GERMANY, YEAR: 2008(*)

Name of Cooperative	Sector/ Activity	Turnover (billion €)	Market Share (%)	Farmers Members ('000)	Salaried Workers ('000)
BayWa	Supplies	8,795	:	(*)	(*)
Agravis	Supplies	5,811	:	(*)	(*)
Nordmilch	Dairy	2,500	:	7,989	7,989
Humana Milchunion	Dairy	2,200	:	5,000	5,000
RWZ Rhein-Main	Supplies	2,119	:	(*)	(*)
Westfleisch	Meats	2,008	:	(*)	(*)
Landgard	Fruit, vegetables & plants	1,269	:	:	:
Hochwald Nahrungsmittel-werke	Dairy, Cheese, Sausage	ca. 1,000	:	10,500	1,600
Bayernland	Dairy	ca. 1,000	:	(*)	(*)
ZG Karlsruhe	Supplies	0,959	:	(*)	(*)

Source: GERMAN RAIFFEISEN ASSOCIATION / DEUTSCHER RAIFFEISENVERBAND

(*) Central cooperatives without any direct members

Greece

Table 18: GENERAL DATA ON AGRICULTURAL COOPERATIVES IN GREECE

	1998	2000	2002	2008
Number of Farmers (‘000) (1)	862,0	:	:	750,0
Number of Cooperatives (2)	:	6.470	6.370	6.170
Farmers members of at least one Cooperative (%)	:	:	:	:
Number of members (‘000) (including membership in several Cooperatives)	:	745,00	714,00	:
Number of salaried workers (‘000)	:	:	:	:
Turnover (billion €) (3)	:	0,93	1,04	:
Number of Cooperatives present in the Stock Exchange (3)	0	0	0	0

Source: PANHELLENIC CONFEDERATION OF AGRICULTURAL COOPERATIVE UNIONS—(PASEGES)/ ΠΑΝΕΛΛΗΝΙΑ ΣΥΝΟΜΟΣΠΟΝΔΙΑ ΕΝΩΣΕΩΝ ΑΓΡΟΤΙΚΩΝ ΣΥΝΕΤΑΙΡΙΣΜΩΝ (ΠΑ.Σ.Ε.ΓΕ.Σ)

Notes: (1) - Estimates; (2) - regarding only members of the UACs (the UACs are members of PASEGES); (3) - regarding only PASEGES members; : - Data not available

Greece

Table 19: DATA RELATING TO ENTERPRISES: BIGGEST AGRICULTURAL COOPERATIVES IN GREECE, YEAR: 2008

Name of Cooperatives	Sector/Activity	Turnover (billion €)	Market Share (%)	Farmers Members ('000)	Salaried Workers ('000)
"PINDOS", Agricultural poultry Co-operative of Ioannina	Poultry	0,165	25	0,57	0,80
U.A.C.of Larissa-Tirnavos -Agia	Cotton, feedingstuffs, olives, trade	0,088	:	17,85	0,24
Agricultural poultry coop-erative of Arta	Poultry	0,067	:	0,14	0,33
U.A.C. of Iraklio	Wine, Olive oil, trade	0.057	:	19,36	0,22
VENUS', Agricultural cooperative of Veria	fresh & canned fruit (peaches, apples, cherries)	0,048	:	0,52	0,05
U.A.C. of Trikala	cotton, feedingstuffs, vine-gar, trade	0,032	:	10,60	0,23
U.A.C. of Kavala	cotton, feedingstuffs, olive-oil, legumes	0,031	:	6,00	0,06
AL.M.ME.', Association of agricul-tural cooperatives	canned fruit (peaches, fruit-cocktail, pears)	0,031	:	2,20	0,10
U.A.C. of Sitia	Wine, Olive oil, trade	0,030	:	9,50	0,12
U.A.C. of Peza	Wine, Olive oil, trade	0,026	:	3,00	0,13
U.A.C. of Preveza	trade, olive-oil	0,023	:	7,03	0,17
U.A.C. of Lamia	cotton, dairy, trade	0,022	:	14,43	0,12
U.A.C. of Orestiada	feedingstuffs, seeds, trade	0,019	:	4,08	0,06
U.A.C. of Rodopi	Cotton, dairy, cereals, trade	0,016	:	6,44	0,17
Chios Gum Mastic Grow-ers Association	gum mastic	0,016	:	4,85	0,06
U.A.C. of Naxos	dairy, seed potato,trade	0,016	:	2,25	0,07
A.C of Tybaki	fresh vegetables	0,016	:	0,60	0,02
U.A.C. of Lesvos	Olive-oil, trade	0,015	:	11,80	0,05

Notes: - Data not available

Source: PANHELLENIC CONFEDERATION OF AGRICULTURAL COOPERATIVE UNIONS—(PASEGES)/ ΠΑΝΕΛΛΗΝΙΑ ΣΥΝΟΜΟΣΠΟΝΔΙΑ ΕΝΩΣΕΩΝ ΑΓΡΟΤΙΚΩΝ ΣΥΝΕΤΑΙΡΙΣΜΩΝ (ΠΑ.Σ.Ε.ΓΕ.Σ)

Spain

Table 20: GENERAL DATA ON AGRICULTURAL COOPERATIVES IN SPAIN

	1998	2000	2003	2008
Number of Farmers ('000)	1.242,4	1.157,1	1.058,1	1.160,3
Number of Cooperatives	3.968	3.902	4.175	3.989,0
Farmers members of at least one Cooperative (%)	:	:	:	:
Number of members ('000) (including membership in several Cooperatives)	1.072,00	983,00	932,12	972,380
Number of salaried workers ('000)	47,00	48,44	78,44	94,156
Turnover (billion €)	8,75	10,82	14,19	18.889
Number of Cooperatives present in the Stock Exchange	0	0	0	-

Notes: : - data not available

Source: Agri-food Cooperatives / Cooperativas Agro-Alimentarias

Table 21: SECTORAL DATA ON AGRICULTURAL COOPERATIVES IN SPAIN

	Agricultural Cooperatives (N°)		Market Share (%)		Farmer Members ('000)		Turnover (billion €)		Salaried Workers ('000)	
	2003	2008	2003	2008	2003	2008	2003	2008	2003	2008
Cereals	520	484	35	35	67,20	58,60	0,588	0,975	4,05	:
Milk & Dairy	242	396	40	40	43,50	27,80	0,713	0,880	3,25	:
Beef & Cattle	158		35	35	39,50	39,40	0,424	0,663	1,25	:
Pigmeat	101		25	25	25,25	25,00	0,674	0,756	3,00	:
Olive Oil	915	772	75	70	274,5	276,5	1,208	1,420	7,20	:
Wine	715	625	70	70	167,00	172,00	0,653	1,400	4,95	:
Fruit & Vegetables	945	945	15-45	15-45	153,00	160,50	2,066	3,700	23,10	:
Forestry	1850	1249	70	70	460,00	414,60	2,027	1,693	5,20	:
Industrial Crops	82	80	35	35	17,30	16,50	0,401	0,421	2,45	:
Other	:	:	:	:	:	:	:	2,307	:	:

Source: Agri-food Cooperatives / Cooperativas Agro-Alimentarias

Spain

Table 22: DATA RELATING TO ENTERPRISES: BIGGEST AGRICULTURAL COOPERATIVES IN SPAIN, YEAR: 2008

Name of Cooperative	Sector/Activity	Turnover (billion €)	Farmers Members ('000)	Salaried Workers ('000)
Coop Orensanas (COREN)	LIVESTOCK-FEEDINGSTUFFS	0,966	6,000	3,884
Coop AN	F&V FEEDINGSTUFFS CEREALS	0,420	24,100	0,269
Coop Anecoop	F&V	0,412	135,000	0,176
Coop Hojiblanca	OLIVE OIL	0,276	9,600	0,182
COVAP- Coop Ganadera Valle de los pedroches	DAIRY/ LIVESTOCK/ FEEDINGSTUFFS	0,266	7,071	0,455
ACOREX S.C.L.	F&V/LIVESTOCK/ FEEDINGSTUFFS	0,245	6,500	0,99
CASI, S.C.A.	F&V	0,170	1,435	0,210
Del Camp d'Ivars d'Urgell i Secció de Crèdit, SCCL	LIVESTOCK-FEEDINGSTUFFS	0,160	2,263	0,87
ARENTO, Grupo Cooperativo Agroali-mentario de Aragón, S. Coop	LIVESTOCK-FEEDINGSTUFFS/ CEREALS	0,144	19,000	0,21
S. COOP. GENERAL AGROPECUARIA (ACOR)	SUGAR	0,140	8,699	0,270
S. COOP. AGROPECUARIA PALEN-TINA (AGROPAL)	DAIRY/ LIVESTOCK/ FEEDINGSTUFFS	0,139	1,727	0,116
Copaga, SCCL	LIVESTOCK/OLIVE OIL/NUTS	0,130	1,089	0,105
SAT Central Lechera Asturiana	DIARY	0,125	7,443	0,13
S. COOP. COBADU	LIVESTOCK/CEREALS	0,123	9,046	0,108
S.A.T. Arco Iris	LIVESTOCK	0,120	1,015	0,4
Actel, SCCL	F&V/CEREALS	0,119	11,666	0,326
ALIMER, S. COOP	LIVESTOCK/F&V/DIARY	0,113	1,393	0,525
"COARVAL" Coop.V.	SUPPLIES	0,093	90,000	0,61
Agropecuària i Secció de Crèdit d'Artesa de Segre, SCCL	LIVESTOCK/FEEDINGSTUFFS	0,088	1,300	0,53
S. COOP. AVICOLA Y GANADERA SE-GOVIANA (AVIGASE)	LIVESTOCK/FEEDINGSTUFFS	0,086	2,005	0,84
Carchuna La Palma, s.coop.and.	F&H	0,079	O,472	0,131
SUCA, S.C.A.	SUPPLIES	0,078	0,61	0,40
S.C.A. Santa Maria de la Rábida	STRAWBERRIES	0,077	0,199	0,59
S. COOP. COPISO SORIA	FEEDINGSTUFFS	0,076	1,335	0,90
FEIRACO S.C.G	DAIRY	0,073	4,500	0,223

Source: Source: Agri-food Cooperatives / Cooperativas Agro-Alimentarias

France

Table 23: GENERAL DATA ON AGRICULTURAL COOPERATIVES IN FRANCE

Notes: (1) - in 2008: total number of cooperatives = 3.000 + 12.500 CUMA; : - Data not available

	1998	2000	2002	2003	2008
Number of Farmers ('000)	1.000,0	885,0	916,0	:	:
Number of Cooperatives (1)	3.750	3.600	3.600	3.500	3.000
Farmers members of at least one Cooperative (%)	90	90	90	90	75
Number of members ('000) (including membership in several Cooperatives)	612,00	600,00	580,00	580,00	:
Number of salaried workers ('000)	:	:	:	150,00	:
Turnover (billion €)	63,00	64,00	65,00	67,00	80,00
Number of enterprises/ farms ('000)	680,00	664,00	:	:	550,00
Number of Cooperatives present in the Stock Exchange	0	0	0	0	:

Source: COOP DE FRANCE

Table 24: SECTORAL DATA ON AGRICULTURAL COOPERATIVES IN FRANCE

	Agricultural Cooperatives (N°)		Market Share (%)		Farmer Members ('000)		Turnover (billion €)		Salaried Workers ('000)	
	2003	2008	2003	2008	2003	2008	2003	2008	2003	2008
Multipurpose		163								
Cereals	350	215	74	74	300,00	300,00	11,00	11,00	25,00	25,00
Flex & Hemp										
Sugar	9	5	62	62	12,50	18,00	1,90	3,70	8,40	2,00
Feedingstuffs	91	80	60	70		73,00		2,80	9,30	6,00
Milk & Dairy products	340	342	37	37	75,00	93,00	7,20	7,10	20,20	20,00
Beef & Cattle	285	220			110,00	97,00	10,10	12,00	21,20	20,00
Pigmeat										
Eggs & Poultry				35						
Insemination	80	67	95	95	200,00		0,20		3,50	
Olive Oil		50								
Wine	900	750		87	120,00		3,40	5,10	8,70	8,50
Tobacco	10	7	100		5,70	2,40		0,06	0,25	0,02
Fruit & Vegetables	350	300		35	35,00	35,00	3,80	4,50	8,00	10,00
Honey	12	12	20	20	1,00	1.000,00	0,02	0,01	0,03	0,03
Forestry	39	27	20	23	70,00	87,00	0,20	0,22	0,90	0,86
Other		716								

Source: COOP DE FRANCE

France

Table 25: DATA RELATING TO ENTERPRISES: BIGGEST AGRICULTURAL COOPERATIVES IN FRANCE, YEAR: 2008 (*)

Name of Cooperative	Sector/Activity	Turnover (billion €)	Market Share (%)	Farmers Members ('000)	Salaried Workers ('000)
Union IN VIVO	Cereals / Supplies	5,200	:	283*	6,4
TERRENA	Multipurpose	3,900	:	25,0	10,8
TEREOS	Sugar	3,800	:	12,0	13,0
SODIAAL	Dairy	2,746	:	9,1	3,4
Coopagri Bretagne	Multipurpose	1,950		16,0	4,3
AGRIAL	Multipurpose	1,910	:	10,0	6,7
Champagne Céreales	Cereals / Supplies	1,828	:	6,6	0,7
EPIS Centre	Cereals, Supplies	1,771	:	8,0	1,7
Cooperl Arc Atlantique	Meat	1,700	:	2,0	2,4
Cristal Union	Sugar	1,329	:	6,0	1,5
UNICopa	Multipurpose	1,312	:	:	:
CECAB	Multipurpose	1,300	:	:	:
EURALIS	Multipurpose	1,289	:	:	:
Groupe Even	Dairy	1,150	:	:	:
LIMAGRAIN	Seeds,	1,119	:	:	:
MAISADUR	Multipurpose	0,895	:	:	:
AGRALYS	Cereals / Supplies	0,877	:	:	:
Maitres laitiers du Contentin	Dairy	0,815	:	:	:
UNEAL	Multipurpose	0,772	:	:	:
GLAC	Dairy	0,740	:	:	:

Source: COOP DE FRANCE
Notes: : - Data not available

* members refer to cooperatives

Ireland

Table 26: GENERAL DATA ON AGRICULTURAL COOPERATIVES IN IRELAND

	1998	2000	2002	2008
Number of Farmers ('000)	:	:	136,5	128,8
Number of Cooperatives	122	:	99	150
Farmers members of at least one Cooperative (%))	100	:	100	
Number of members ('000) (including membership in several Cooperatives)	185,65	:	197,89	181,000
Number of salaried workers ('000)	37,12	:	35,29	36,500
Turnover (billion €)	11,30	:	12,40	12,583
Number of Cooperatives present in the Stock Exchange	5	:	4	3

Table 27: SECTORAL DATA ON AGRICULTURAL COOPERATIVES IN IRELAND

	Agric. Cooperatives (N°)		Market Share (%)		Farmer Members ('000)		Turnover (billion €)		Salaried Workers ('000)	
	2003	2008	2003	2008	2003	2008	2003	2008	2003	2008
Milk & Dairy	30	30	97	97	88,60	79,60	10,50	11,70	30,20	34,90
Marts	33	23	70	70	39,30	36,60	0,50	0,55	1,30	0,87
Wholesale	3	:	65	:	0,13	:	1,30	:	2,70	:
Fishing	10	7	:	:	0,83	0,60	0,05	0,05	0,30	0,23
Tourism/RD	4	8	:	:	0,69	0,64	:	246,0	0,03	0,52

Table 28: DATA RELATING TO ENTERPRISES: BIGGEST AGRICULTURAL COOPERATIVES IN IRELAND, YEAR: 2008

Name of Cooperative	Sector/Activity	Turnover (billion €)	Farmers Members ('000)	Salaried Workers ('000)
Kerry Group	Dairy / other	4,700	9,700	22,300
Glanbia	Dairy / Multipurpose	2,200	18,600	4,900
Irish Dairy Board	Dairy	2,110	70 (members are cooperatives)	3,788
Dairygold	Dairy / Multipurpose	0,620	10,900	0,824
Lakeland Dairies	Dairy / Multipurpose	0,454	4,675	0,667
Connacht Gold	Dairy / Multipurpose	0,320	14,100	0,563
Town of Monaghan	Dairy / Multipurpose	0,191	1,500	0,120
Arrabawn	Dairy / Multipurpose	0,178	5,500	0,250
Tipperary	Dairy / Multipurpose	0,169	1,847	0,250
Donegal	Dairy / Multipurpose	0,125	1,653	0,068
Drinagh	Dairy / Multipurpose	0,080	2,671	0,183
Cork Marts	Marts	0,080	15,100	0,152

Source: IRISH COOPERATIVE ORGANISATION SOCIETY LTD (ICOS)
Notes: : - Data not available

Table 29: GENERAL DATA ON AGRICULTURAL COOPERATIVES IN ITALY

Number of Farmers (‘000)	866,615
Number of Cooperatives	5,748
Number of salaried workers (‘000)	90,573
Turnover (billion €)	30,30

Source: LECAGOOP/ AGROALIMENTARE

TABLE 30: SECTORAL DATA ON AGRICULTURAL COOPERATIVES IN ITALY

	Agricultural Cooperatives		Turnover		Employees		Farmer Members	
	no.	%	(billion €)	%	(‘000)	%	(‘000)	%
Services	1.409	24,5	7,072	23,3	18,873	20,8	271,059	31,3
Milk & Dairy	978	17	6,734	22,2	11,956	13,2	42,049	4,9
Fruit & Vegetables	1.155	20,1	6,012	19,8	21,777	24	107,620	12,4
Meat	502	8,7	5,896	19,5	18,842	20,8	23,988	2,8
Wine	583	10,1	3,164	10,4	8,848	9,8	198,122	22,9
Olive Oil	341	5,9	0,220	0,7	1,813	2	169,448	19,6
Other	780	13,6	1,232	4,1	8,464	9,3	54,329	6,3
Italy (TOTAL)	5.748	100	30,330	100	90,573	100	866,615	100

Source: LECAGOOP/ AGROALIMENTARE

Table 31: GENERAL DATA ON AGRICULTURAL COOPERATIVES IN ITALY

	1998	2000	2003	2008
Number of Farmers ('000)	:	:	:	:
Number of Cooperatives	4.278	4.262	3.863	3.620
Farmers members of at least one Cooperative (%)	:	:	:	:
Number of members ('000) (including membership in several Cooperatives)	571,0	615,4	536,2	497,5
Number of salaried workers ('000)	44,00	52,77	64,01	65,54
Turnover (billion €)	12,72	14,81	20,83	25,50
Number of Cooperatives present in the Stock Exchange	—	—	—	—

Source: NATIONAL ASSOCIATION OF AGRICULTURAL AND AGRIFOOD COOPERATIVES / FEDERAZIONE NAZIONALE DELLE COOPERATIVE AGRICOLE ED AGROALIMENTARI (FEDAGRI-CONFCOOPERATIVE)

Notes: : - Data not available

TABLE 32: SECTORAL DATA ON AGRICULTURAL COOPERATIVES IN ITALY

	Agric.ultural Cooperatives (N°)		Farmer Members ('000)		Turnover (billion €)		Salaried Workers ('000)	
	2003	2008	2003	2008	2003	2008	2003	2008
General (Multipurpose) (incl. supplies, cereals, sugar)	:	:	:	:	:	:	0,175	:
Milk & Dairy	797	671	34,39	25,00	4,027	4,300	7,28	6,70
Beef & Cattle & Pigmeat (1)	409	321	14,83	13,10	2,259	2,475	8,47	7,49
Eggs & Poultry	44	37	O,793	0,670	3,024	3,500	9,89	9,60
Olive Oil	175	190	69,86	57,00	0,103	0,112	1,01	1,00
Wine	432	423	161,98	148,00	2,205	2,500	5,73	5,90
Tobacco	40	39	8,44	4,90	0,116	0,070	0,898	
Fruit & Vegetables	621	594	68,25	63,00	3,789	4,600	16,97	19,80
Supplies (Fertilisers, pesticides,..)	1.197	1.175	174,34	183,00	5,237	7,900	12,21	13,00
Forestry	148	143	3,254	2,90	0,074	0,060	1,514	1,300

Notes: (1) includes honey

Source: NATIONAL ASSOCIATION OF AGRICULTURAL AND AGRIFOOD COOPERATIVES / FEDERAZIONE NAZIONALE DELLE COOPERATIVE AGRICOLE ED AGROALIMENTARI (FEDAGRI-CONFCOOPERATIVE)

Italy FEDAGRI-CONFCOOPERATIVE

Table 33: DATA RELATING TO ENTERPRISES: BIGGEST AGRICULTURAL COOPERATIVES IN ITALY, YEAR: 2008

Name of Cooperative	Sector/Activity	Turnover (billion €)
Agricola Tre Valli	Animal products and feedings	2,332
Gesco	Poultry	1,154
Gruppo Conserve Italia	Fruit & Vegetables	0,963
Consorzio Latterie Sociali Mantovane	Dairy	0,414
UNIPEG (adesione plurima)	Slaughtering	0,394
Agrintesa	Fruit & Vegetables	0,250
Consorzio Melinda	Fruit & Vegetables	0,244
APOFRUIT GROUP	Fruit & Vegetables	0,243
Consorzio Granlatte (adesione plurima)	Dairy	0,237
AVI.COOP	Slaughtering	0,165
Consorzio Produttori Bionature	Poultry	0,220
VI.P COOP	Services	0,213
COOPERLAT	Dairy	0,208
Italcarni	Slaughtering	0,203
Cooperativa Produttori Suini (ad. Plurima)	Slaughtering	0,196
Latteria Soresina	Dairy	0,186
Milkon Alto Adige	Services	0,185
Caviro	Wine	0,182
C.L.A.I. - Lavoratori Agricoli Imolesi	Slaughtering	0,173
ALL.COOP	Services	0,157
VOG - Consorzio Coop. Ortofrutticole Alto Adige	Fruit & Vegetables	0,148
CAVIT	Wine	0,139
Orogel fresco	Fruit & Vegetables	0,136
Assegnatari Associati Arborea	Dairy	0,133
AZOVE	Zoo-technical	0,125
ASSOCOM	Zoo-technical	0,120

Source: (FEDAGRI-CONFCOOPERATIVE)
Notes:

Table 34: GENERAL DATA ON AGRICULTURAL COOPERATIVES IN ITALY

	1998	2000	2003	2008
Number of Farmers ('000)	:	:	:	:
Number of Cooperatives	1296	1278	1301	1.119
Farmers members of at least one Cooperative (%)	:	:	:	:
Number of members ('000) (including membership in several Cooperatives)	249,6	224,3	247,6	196,8
Number of salaried workers ('000)	19,10	20,5	22,70	21,90
Turnover (billion €)	4,20	4,91	6,24	7,20
Number of Cooperatives present in the Stock Exchange	0	0	0	0

SOURCE: NATIONAL ASSOCIATION OF AGRIFOOD COOPERATIVES FOR RURAL DEVELOPMENT / LEGACOOP AGROALIMENTARE
Notes: : - Data not available (*) includes the honey sector; (**) includes the beet and sugar, cereals and animal feed sectors

Table 35: SECTORAL DATA ON AGRICULTURAL COOPERATIVES IN ITALY

	Agric. Cooperatives (N°)		Market Share (%)		Farmer Members ('000)		Turnover (billion €)		Salaried Workers ('000)	
	2003	2008	2003	2008	2003	2008	2003	2008	2003	2008
Production and Forestry	742	:	:	:	44,00	:	1,00	:	8,00	:
Cereals	55	:	:	:	70,00	:	1,00	:	1,00	:
Milk & Dairy products	134	105	:	:	7,00	6,00	2,00	2,00	1,00	2,00
Meat		124	:	:		8,00	:	2,00	:	4,00
Olive Oil	67	76	:	:	32,00	30,00	0	1,00	0	0
Wine	92	94	:	:	39,00	41,00	1,00	1,00	2,00	2,00
Fruit & Vegetables (and flowers)	121	129	:	:	17,00	19,00	1,00	1,00	4,00	5,00
Services	:	161	:	:	:	64,30	:	1,30	:	3,10
Other	:	430	:	:	:	28,00	:	0,83	:	5,27
TOTAL		1.119	:	:		197,00		7,2		22,00

SOURCE: NATIONAL ASSOCIATION OF AGRIFOOD COOPERATIVES FOR RURAL DEVELOPMENT / LEGACOOP AGROALIMENTARE

Italy LEGACOOP AGROALIMENTARE

Table 36: DATA RELATING TO ENTERPRISES: BIGGEST AGRICULTURAL COOPERATIVES IN ITALY, YEAR: 2008 (*)

Name of Cooperative	Sector/Activity	Turnover (billion €)	Market Share (%)	Farmers Members ('000)	Salaried Workers ('000)
Granarolo Group**	Dairy	0,985	:	0,701	1,70
Progeo Group	Feedingstuffs	0,329	:	16,612	0,45
Unipeg	Meat	0,394	:	1,172	0,28
Grupo Italiano Vini (1)	Wine	0,288	:	0,00	0,93
Apofruit Group	Fruit & Vegetables	0,243	:	4,307	2,14
ITALCARNI	Meat	0,204	:	84	172
COOPERATIVA PRODUT-TORI SUINI PRO-SUS	Meat	0,197	:	116	211
MA.GE.MA.	Meat	0,160	:	113	311
TERREMERSE	Services	0,140	:	5,905	738
Cantine Riunite & CIV	Wine	0,095	:	1,06	0,126 + 0,064 seasonal
Gruppo Montalbano	Olive Oil	0,050	:	2,229	0,037

SOURCE: NATIONAL ASSOCIATION OF AGRIFOOD COOPERATIVES FOR RURAL DEVELOPMENT / LEGACOOP AGROALIMENTARE

Notes:

(1) 8 cooperatives members: - data not available

** it is a joint-stock company, and it is a subsidiary company of the cooperative Granlatte (wich is associated with both Legacoop and Confcooperative)

members are not directly farmers (farmers are associated with Granlatte)

Latvia

Table 37: GENERAL DATA ON AGRICULTURAL COOPERATIVES IN LATVIA

	1998	2002	2006	2008
Number of Farmers (‘000)	:	37,0	7,4	8,4
Number of Cooperatives	45	68	107	107
Farmers members of at least one Cooperative (%)	:	21	:	:
Number of members (‘000) (including membership in several Cooperatives)	:	7,65	:	:
Number of salaried workers (‘000)	:	0,47	0,586	0,552
Turnover (billion €)	:	:	0,121	0,250
Number of Cooperatives present in the Stock Exchange	:	:	:	:

Table 38: SECTORAL DATA ON AGRICULTURAL COOPERATIVES IN LATVIA

	Agric. Cooperatives (N°)		Market Share (%)		Farmer Members (‘000)		Turnover (billion €)		Salaried Workers (‘000)	
	2003	2008	2003	2008	2003	2008	2003	2008	2003	2008
General (Multipurpose & supplies)	:	6	:	:	:	110	:	2,790	:	25
Cereals	30	32	30,000	35	2.671	2.690	1,420	172,580	157,000	166
Milk & Dairy	23	30	25,000	34	3.054	4.480	5,690	68,640	224,000	230
Beef & Cattle	1	7		:		542	:	2,290	:	25
Pigmeat	:	1		:		40	:	0,500	:	2
Fruit & Vegetables	11	17	1,000	:	1.569	256	1,270	2,270	50,000	50
Honey	1	1	0,500	:	124	20	0,240	0,008	6,000	1
Forestry	:	14		:		284	:	1,380	:	53
Other	6		5,000		976		0,920	:	68,000	:

Table 39: DATA RELATING TO ENTERPRISES: BIGGEST AGRICULTURAL COOPERATIVES IN LATVIA, YEAR: 2008

Name of Cooperative	Sector/Activity	Turnover (billion €)	Market Share (%)	Farmers Members (‘000)	Salaried Workers (‘000)
Latraps	cereals	0,096,		0,466	0,81
Piena ceļš	milk	0,021		0,110	0,60
Trikāta KS	milk	0,029		0,270	0,23
Vidzemes agroekonomiskā kooperatīvā sabiedrība	cereals	0,018		0,230	0,25

Source: LATVIAN AGRICULTURAL COOPERATIVES ASSOCIATION / LATVIJAS LAUKSAIMNIECĪBAS KOOPERATĪVU ASOCIĀCIJA (LLKA)
Notes: : - Data not available

Lithuania

Table 40: GENERAL DATA ON AGRICULTURAL COOPERATIVES IN LITHUANIA

	1998	2002	2006	2006
Number of Cooperatives				201
Number of members ('000) (including membership in several Cooperatives)	:	:	:	8,739
Number of salaried workers ('000)				1,245
Note: : - Data not available				

Table 41: SECTORAL DATA ON AGRICULTURAL COOPERATIVES IN LITHUANIA

	Agricultural Cooperatives (N°)	
	2003	2006
Cereals	60	58
Milk & Dairy products	49	44
Beef & Cattle	16	16
Pigmeat	15	15
Fruit & Vegetables	45	43
Other	25	25
Honey	1	1

Table 42: DATA RELATING TO ENTERPRISES: BIGGEST AGRICULTURAL COOPS IN LITHUANIA, YEAR: 2008

Name of Cooperative	Sector/Activity	Turnover (billion €)	Market Share (%)	Farmers Members ('000)	Salaried Workers ('000)
ŽŪK "Dzūkijos pienas"(1)		0,700		1.446,000	
ŽŪK "Juodoji uoga" (1)		0,390		55,000	
ŽŪK "Agaro riešutas" (1)		0,520		10,000	
ŽŪK "Kupiškio grūdai" (1)		1,790		11,000	
ŽŪK "Pavalakis" (1)		1,290		820,000	
ŽŪK "Raseinių javai" (1)		0,480		102,000	
ŽŪK "Lietuviškas pienelis" (1)		0,680		973,000	
Zibartoniai (2)	Crop & Animal production	0,003	1,70	0,34	0,39
Gruduva (2)	Crop & Animal production	0,003	1,40	0,01	0,12
Zelsvele (2)	Crop & Animal production	0,002	0,90	0,02	0,15
Papile (2)	Crop & Animal production	0,002	0,80	0,56	0,28
Kursenai (2)	Crop & Animal production	0,001	0,60	0,17	0,17

Source: (1) Lithuanian Association of Agricultural Cooperatives –2006 data,
(2) LITHUNIAN FARMERS' UNION / LIETUVOS ŪKININKŲ SĄJUNGA (LUS)

The Netherlands

Table 43: GENERAL DATA ON AGRICULTURAL COOPERATIVES IN THE NETHERLANDS
Notes: : - Data not available, Figures in RED originate from the 2000 issue of "Agricultural Co-operation in the European Union: Issues and Trends" Cogeca [P(00)161i1]; (**) – Not all members are farmers.

	1998	2000	2003	2008
Number of Farmers ('000)	104,9	97,5	85,5	75,2
Number of Cooperatives	115	51	:	:
Farmers members of at least one Cooperative (%)	:	:	:	:
Number of members ('000) (including membership in several Cooperatives)	256,80	156,75	:	:
Number of salaried workers ('000)	59,60	:	:	:
Turnover (billion €)	22,74	39,21	:	:
Number of Cooperatives present in the Stock Exchange	:	:	:	:

Source: NATIONAL COOPERATIVE COUNCIL FOR AGRICULTURE AND HORTICULTURE / NATIONALE COOPERATIEVE RAAD VOOR LAND- EN TUINBOUW (NCR)

Table 44: SECTORAL DATA ON AGRICULTURAL COOPERATIVES IN THE NETHERLANDS

	Agricultural Cooperatives (N°)		Market Share (%)		Farmer Members ('000)		Turnover (billion €)		Salaried Workers ('000)	
	1998	2002	1998	2002	1998	2002	1998	2002	1998	2002
General (multipurpose) / supplies	23	21	:	:	77,63	42,16	2,68	5,06	6,63	7,12
Sugar	1	1	63	100	12,47	10,90	1,10	1,69	3,78	4,27
Feedingstuffs										
Milk & Dairy products	5	4	85	87	20,08	17,70	8,83	10,09	23,96	21,01
Beef & Cattle, Pigmeat	1	1					0,76	8,54	4,68	35,58
Insemination (1 pig and 1 cattle breeding)	2	2		>70		28,04		0,22		1,87
Wine		1		:		0,01		:		:
Fruit & Vegetables*	6	6	60	60	7,17	2,74	1,94	1,90	2,66	2,24
Flowers & Plants	5	2	95	95	11,66	5,56	2,78	4,17	4,61	3,69
Potato starch	1	1	100	100	4,57	3,46	0,68	0,65	2,60	1,40
Potatoes	4	4	:	:		2,82		0,55		0,50
Credit	349	153	84	84	1.108,00	1.707,00	33,40	43,80	51,87	60,57
Wool	1	0	75		7,20		0,01		0,01	
Veterinary services	1	1	:	:	2,00	2,14	0,12	0,22	0,27	0,40
Mushrooms & compost	1	2	:	:	0,38	0,30	0,21	0,33	0,63	0,53

Source: NATIONAL COOPERATIVE COUNCIL FOR AGRICULTURE AND HORTICULTURE / NATIONALE COOPERATIEVE RAAD VOOR LAND- EN TUINBOUW (NCR)

The Netherlands

Table 45: DATA RELATING TO ENTERPRISES: BIGGEST AGRICULTURAL COOPERATIVES IN THE NETHERLANDS YEAR: 2008 (*)

Name of Cooperative	Sector/Activity	Turnover (billion €)	Farmers Members ('000)	Salaried Workers ('000, [5] fte)
FrieslandCampina	Dairy	9,481	15,837	20,568
VION [1]	Meat & Livestock	8,540	-	35,583
FloraHolland	Flowers	4,074	5,124	3,555
Royal Cosun,	Sugar/Multi-sector	1,689	10,896	4,266
The Greenery	Horticulture	1,308	1,150	1,661
Cehave Landbouwbelang	Supplies	1,192	6,000	1,799
Agrifirm	Supplies	0,916	15,000	1,055
ForFarmers	Supplies	0,721	6,500	0,608
Avebe	Starch	0,653	3,457	1,397
Cebeco Groep [2]	Multi-sector	0,618	0,002	1,722
FresQ	Horticulture	0,393	0,079	0,015
DOC Kaas	Dairy	0,359	1,077	190
CNB	Flower bulbs	0,318	1,700	133
CZAV	Supplies	0,310	3,022	292
FruitmastersGroep	Fruit	0,295	0,554	357
Boerenbond Deurne	Supply/feed	0,259	0,573	171
Agrico	Potatoes	0,248	1,029	182
HZPC [3]	Potatoes	0,234	1,261	208
ZON fruit & vegetables	Horticulture	0,229	0,422	156
CNC	Mushrooms/compost	0,223	0,217	531
Horticoop	Supply horticulture	0,222	3,758	477
AUV Dierenartsencoöperatie [4]	Veterinarians	0,217	2,136	401
Rijnvallei	Supplies	0,212	2,349	322
CONO Kaasmakers	Dairy	0,169	0,484	142
Versdirect.nl	Horticulture	0,168	0,112	16

Notes: [1] VION isn't formally a cooperative, but it's main Shareholder is the regional farmers' organisation ZLTO.

Source: NATIONAL COOPERATIVE COUNCIL FOR AGRICULTURE AND HORTICULTURE / NATIONALE COOPERATIEVE RAAD VOOR LAND- EN TUINBOUW (NCR)

cooperative)

[2] Members are cooperatives

[3] Most certificates are owned by associated potato growers

[4] Members are veterinarians

[5] Salaried workers: fte (full time equivalent!

Austria

Table 46: GENERAL DATA ON AGRICULTURAL COOPERATIVES IN AUSTRIA

	1998	2000	2003	2008
Number of Farmers ('000)	252,1	217,5	:	187,00
Number of Cooperatives	1.047	1.081	1.046	1.049
Number of members ('000) (including membership in several Cooperatives)	560,67	498,43	441,28	405,93
Number of salaried workers ('000)	19,02	19,19	19,94	24,13
Number of Cooperatives present in the Stock Exchange	2	2	1	3

Table 47: SECTORAL DATA ON AGRICULTURAL COOPERATIVES IN AUSTRIA

	Agricultural Cooperatives (N°)		Market Share (%)		Farmers Members ('000)		Turnover (billion €)		Salaried Workers ('000)	
	2003	2008	2003	2008	2003	2008	2003	2008	2003	2008
General (Multipurpose)	94	84,00		;	137.00	122,00	2	3,00	12	13,00
Cereals	:	;	60	60,00	:	:	:	;	:	;
Sugar	1	1,00	100	100,00	10	9,00	:	:	1	1,00
Feedingstuffs	:	:	:	60,00	:	:	:	:	4	:
Milk & Dairy	175	124,00	94	44,00	38	38,00	:	:	:	4,00
Beef & Cattle	:	:	20	20,00	33	30,00	:	:	:	:
Wine	37	35,00	:	:	:	:	:	:	:	:

Notes: (*) - Market share: Data not available – estimated turnover in €: milk: 1.45 billion €; warehouses: 1.59 billion €; sugar: 0.35 billion €(**) - Turnover (billion €) 1.9 warehouse markets in 1998 and 2.3 in 2003. In 1998: 1.1 central warehouses and 1.4 in 2003

Table 48: DATA RELATING TO ENTERPRISES: BIGGEST AGRICULTURAL COOPERATIVES IN AUSTRIA, YEAR: 2008

Name of Cooperative	Sector/Activity	Turnover (billion €)	Market Share (%)	Farmers Members ('000)	Salaried Workers ('000)
RWA (2)	Supplies	2,000	60	122,00	13,000
Agrana (1)	Sugar, Starch	1,892	100	9,00	1,000
Berglandmilch (3)	Dairy	0,700	35	13,00	1,000
NÖM (4)	Dairy	0,400	20	4,80	0,600
Gmundner Molkerei (5)	Dairy	0,200	10	4,00	0,500

Notes:
: - Data not available
(1) Globar turnover in 23 countries; 65% of which is realised in Austria .
(2) joint stock company
(3) joint stock company (10.500)
(4) joint stock company (6,000)
(5) farmers members per 1000: (incl. 1,100 alp suppliers)

Source: AUSTRIAN RAIFFEISENVERBAND ASSOCIATION / ÖSTERREICHISCHER RAIFFEISENVERBAND (ÖRV)

Portugal

Table 49: GENERAL DATA ON AGRICULTURAL COOPERATIVES IN PORTUGAL

	1998	2000	2003(*)	2007
Number of Farmers ('000)	410,8	409,0	:	:
Number of Cooperatives	908	931	901	905
Farmers members of at least one Cooperative (%)	:	:	:	:
Number of members ('000) (including membership in several Cooperatives)	:	:	:	1.044,9*
Number of salaried workers ('000) (*)	:	60,00	:	18,15*
Turnover (billion €)	:	:	:	2,6*
Number of Cooperatives present in the Stock Exchange	:	:	:	:

Source: PORTUGUESE CONFEDERATION OF AGRICULTURAL COOPERATIVES AND AGRICULTURAL CREDIT (CONFAGRI) / CONFEDERACÃO NACIONAL DAS COOPERATIVAS AGRÍCOLAS E DO CREDITO AGRÍCOLA DE PORTUGAL

Notes: : - Data not available; (*)- Estimates;

Portugal

Table 50: DATA RELATING TO ENTERPRISES: BIGGEST AGRICULTURAL COOPERATIVES IN PORTUGAL, YEAR: 2007 (*)

Name of Cooperative	Sector/Activity	Turnover (million €)	Market Share (%)	Farmers Members ('000)	Salaried Workers ('000)
AGROS	Dairy	196,857	:	:	0,33
BARCELOS	Dairy	69,325	:	:	0,10
PROLEITE	Dairy	60,947	:	:	0,09
UNICOL	Dairy	59,874	:	:	0,16
LACTICOOP	Dairy	58,382	:	:	0,08
Cooperativa Agrícola de Vila do Conde	Dairy	58,100	:	:	0,09
UNILEITE	Dairy	46,270	:	:	0,17
LACTAÇORES	Dairy	44,089	:	:	0,05
UNIÃO AGRÍCOLA	Dairy	28,107	:	:	0,16
Cooperativa Agrícola da Benedita	Feedstuffs	27,017	:	:	0,06
Cooperativa Agrícola Póvoa do Varzim	Dairy	25,922	:	:	0,04
CARMIM	Wine	24,007	:	:	0,09
LEICARCOOP	Dairy	23,153	:	:	0,00
FAGRICOOP	Dairy	23,151	:	:	0,05
AGROMAIS	Supplies	21,317	:	:	0,02
Adega Cooperativa de Borba	Wine	19,978	:	:	0,07
Cooperativa Santo Tirso e Trofa	Supplies	16,373	:	:	0,03
PORTO ALTO	Feedstuffs	16,300	:	:	0,03
Caves Santa Marta	Wine	15,901	:	:	0,07
Adega Cooperativa do Redondo	Wine	14,073	:	:	0,06

Source: PORTUGUESE CONFEDERATION OF AGRICULTURAL COOPERATIVES AND AGRICULTURAL CREDIT (CONFAGRI) / CONFEDERACÃO NACIONAL DAS COOPERATIVAS AGRÍCOLAS E DO CREDITO AGRÍCOLA DE PORTUGAL

Notes:
(*): Unless otherwise stated
: - Data not available

Slovenia

Table 51: GENERAL DATA ON AGRICULTURAL COOPERATIVES IN SLOVENIA

	1998	2003	2006	2008
Number of Farmers ('000)	:	2,0	:	:
Number of Cooperatives	105	86	78	76
Farmers members of at least one Cooperative (%)[1]	:	:	:	:
Number of members ('000) (including membership in several Cooperatives)	:	19,54	17,420	16.539
Number of salaried workers ('000)	:	3,42	2,980	3.022
Turnover (billion €)	0,44	0,51	0,580	0,687
Number of Cooperatives present in the Stock Exchange	:	:	0	0

Notes: : - Data not available

Source: CHAMBER FOR AGRICULTURE AND FORESTRY OF SLOVENIA / KMETIJSKO GOZDARSKA ZBORNICA SLOVENIJE (KGZS)

Table 52: SECTORAL DATA ON AGRICULTURAL COOPERATIVES IN SLOVENIA

	Agricultural Cooperatives (N°)		Market Share (%)		Farmer Members ('000)		Turnover (billion €)		Salaried Workers ('000)	
	2003	2008	2003	2008	2003	2008	2003	2008	2003	2008
General (Multipurpose)	74	64	:	:	:	:	:	:	:	:
Cereals	38	24	28		:	:	:	:	:	:
Flax & Hemp	5		:	:	:	:	:	:	:	:
Sugar	7	0	:	:	:	:	:	:	:	:
Feedingstuffs	58	46	:	:	:	:	:	:	:	:
Milk & Dairy	56	59	80	:	:	:	:	:	:	:
Beef & Cattle	65	56	76	:	:	:	:	:	:	:
Pigmeat	33	18	:	:	:	:	:	:	:	:
Eggs & Poultry	13	5	:	:	:	:	:	:	:	:
Insemination	:	1	:	:	:	:	:	:	:	:
Olive Oil	:	:	:	:	:	:	:	:	:	:
Wine	4	6	:	:	:	:	:	:	:	:
Tobacco	:	:	:	:	:	:	:	:	:	:
Cotton	:	:	:	:	:	:	:	:	:	:
Fruit & Vegetables	24	26	76		:	:	:	:	:	:
Honey	:	:	:	:	:	:	:	:	:	:
Supplies	59	47	114	:	:	:	:	:	:	:
Forestry	24	16	90	:	:	:	:	:	:	:

Source: CHAMBER FOR AGRICULTURE AND FORESTRY OF SLOVENIA / KMETIJSKO GOZDARSKA ZBORNICA SLOVENIJE (KGZS)

Finland

Table 53: GENERAL DATA ON AGRICULTURAL COOPERATIVES IN FINLAND
Notes: : - Data not available

	1998	2000	2003	2008
Number of Farmers ('000)	88,1	78,9	71,6	65
Number of Cooperatives	69	52	48	46
Farmers members of at least one Cooperative (%))	:	:	:	75
Number of members ('000) (including membership in several Cooperatives)	234,00	218,50	215,00	183
Number of salaried workers ('000)	33,60	39,70	45,20	39
Turnover (billion €)	8,40	11,80	13,30	14
Number of Cooperatives present in the Stock Exchange	3	3	3	3

Source: CONFEDERATION OF FINNISH COOPERATIVES / PELLERVO

Table 54: SECTORAL DATA ON AGRICULTURAL COOPERATIVES IN FINLAND

	Agricultural Cooperatives (N°)		Market Share (%)		Farmer Members ('000)		Turnover (billion €)		Salaried Workers ('000)	
	2003	2008	2003	2008	2003	2008	2003	2008	2003	2008
General (Multipurpose)(1)	1	1	40	42	*-	*-	0,67	1,06	0,90	1,43
Cereals + Feedstuffs *	see above and *	see above and *	see above and *	see above and *	:	:	:	:	:	:
Milk & Dairy	32	26	97	97	17,34	11,52	2,64	3,08	5,15	4,88
Beef & Cattle & Pig meat	5	5	78	83	29,56	13,26	1,64	3,74	9,35	13,88
Eggs	2	2	66	47	0,49	0,36	0,05	0,05	0,13	0,14
Insemination	6	4	100	100	36,40	28,08	0,04	0,03	0,59	0,47
Fruit & Vegetables	5	5	0 - 40	0 - 40	0,55	0,50	0,30	0,05	0,06	0,55
Honey	:	**3	:		:		:		:	
Forestry	**3	**3	36	37	132,20	130,20	8,33	6,44	30,10	17,56
Other	:		:		:		:		:	

* Limited company owned by the consumers central cooperative SOK. This company also buys more than 40 % of the grain sold from farms in Finland and deals with feedstuffs as well. Further more both cooperative dairies and slaughter houses have trade with both feedstuff and grain.

** The largest forestry cooperative, Metsäliitto, stands for more than 99% of turnover, members and salaried workers in the Finnish cooperative forest sector

Notes: (1): It concerns Hankkija Agriculture Ltd., a limited company 100 % owned by the consumer cooperatives. As market shares are concerned, in 1998 48 % were cereals and 35 % was feedingstuffs; Market shares for dairy and meat cooperatives = of products bought from farms in Finland

Source: CONFEDERATION OF FINNISH COOPERATIVES / PELLERVO

Finland

Table 55: DATA RELATING TO ENTERPRISES: BIGGEST AGRICULTURAL COOPERATIVES IN FINLAND, YEAR: 2008

Name of Cooperative	Sector/Activity	Turnover (billion €)	Market Share (%)	Farmers Members ('000)	Salaried Workers ('000)
Metsäliitto	forest	6,434	36	129,27	17,54
HKScan	Meat	2,295	:	2,29	7,42
Valio	Dairy	1,844	80	10,25	4,35
Atria	meat	1,357	0	8,48	6,14
Hankkija-Maatalous (Agrimarket)	multipurpose (farm supply)	1,056	42	:	1,43
Osk. Pohjolan Maito	Dairy	0,224	:*	2,27	0,02
Osk. Maitosuomi	Dairy	0,160	:*	1,75	0,02
Alueosuuskunta Promilk	Dairy	0,159	:*	1,45	0,03
Osk. Tuottajain Maito	Dairy	0,157	:*	1,55	0,05
Osk. Länsi-Maito	Dairy	0,099	:*	1,10	0,02
Järvi-Suomen Portti	Meat	0,081	:	2,21	0,31
Osk. Idän Maito	Dairy	0,079	:*	0,77	0,02
Hämeenlinnan Osm.	Dairy	0,061		0,20	0,07
Munakunta	Eggs	0,051	44	0,28	0,12
Kainuun Osm.	Dairy	0,044	:*	0,46	0,02
Osk. Maitomaa	Dairy	0,040	: -	0,05	0,05
Närpes Grönsaker	Vegetables	0,038	30**	0,20	0,03
Osk. Maitokolmio	Dairy	0,035	: -	0,15	0,06
Mejeriandelslaget Milka	Dairy	0,033	:*	0,34	0,01
Osk. Satamaito	Dairy	0,031	: -	0,28	0,04
FABA Palvelu Osk.	Animal breeding	0,021	100	14,96	0,31
Nurmeksen Osm.	Dairy	0,020	:*	0,21	0,01
Kuusamon Osm.	Dairy	0,014	: -	0,19	0,01
Ålands Centralandel-slag	Dairy	0,014	: -	0,05	0,05
Liperin Osm.	Dairy	0,013	:*	0,02	0,02

Notes: : - Data not available * part of Valio
** % in tomatoes

Sweden

Table 56: GENERAL DATA ON AGRICULTURAL COOPERATIVES IN SWEDEN

	1998	2002	2006	2009
Number of Farmers (‘000)	:	71,0	70	67
Number of Cooperatives	53	36	37	30
Farmers’ members of at least one Cooperative (%)	:	:	:	:
Number of members (‘000) (including membership in several Cooperatives)	300,00	300,00	280	275
Number of salaried workers (‘000)	13,60	:	36	35
Turnover (billion €)	10,00	:	14	:
Number of Cooperatives present in the Stock Exchange	0	0	0	0

Source: FEDERATION OF SWEDISH FARMERS / LANDBRUKARNAS RIKSFÖRBUND (LRF)

Notes: : - Data not available; Figures in RED originate from the 2000 issue of "Agricultural Co-operation in the European Union: Issues and Trends" Cogeca [P(00)161i1]

Table 57: DATA RELATING TO ENTERPRISES: BIGGEST AGRICULTURAL COOPERATIVES IN SWEDEN, YEAR: 2006

Name of Cooperative	Sector/Activity	Turnover (billion €)	Market Share (%)	Farmers Members (‘000)	Salaried Workers (‘000)
Arla Foods - Danish/ Swedish member base..	Dairy	5,860	65,0	3,9 (Sweden)	16,60
Lantmännen (primarely grains)	Marketing co-op	3,100	60,0	37	10,5
Södra Skogsägarna	Forestry	1,700	25,0	51,000	1,680
Skånemejerier	Dairy	0,300	13,0	0,057	0,600
Milko	Dairy	1,050	12,0	0,900	0,800
Skogsägarna Norrskog	Forestry	1,423	2,0	13,000	0,321
Mellanskog	Forestry	:	7,0	:	:
Norra Skogsägarna	Forestry	1,650	2,0	13,60	0,412
Landshypotek	Banking (1st mortgage)	:	40,0	51,000	0,100

Notes: : - Data not available

Source: FEDERATION OF SWEDISH FARMERS / LANDBRUKARNAS RIKSFÖRBUND (LRF)

IV

Compendium of Cogeca Member Organisations

In this section:

A compendium of Cogeca member organisations per country

Contacts, organisational structure, policy priorities 2010

Answers to the questionnaire on main issues and trends for Cooperatives in different EU member states

BOERENBOND Belgium

BELGIAN FARMERS' UNION (BB)
AVEVE/BOERENBOND

Organisation founded in 1890

Headquarters:	Diestetsevest 40 BE-3000 LEUVEN BELGIUM Tel + 32 16 28 66 01 Fax + 32 16 28 66 09 e-mail: boerenbond@boerenbond.be
Liaison Office in Brussels:	Rue d' Arlon 82, 3ème étage BE- 1040 Brussels Tel. + 32 2 230 02 22, +32 16 28 64 17 Fax: + 32 2 231 00 27, +32 16 24 20 11 e-mail: brusselsbureau@boerenbond.be
President:	Piet VANTHEMSCHE
Secretary General:	Sonja DE BECKER
Responsible European Affairs:	Pieter VERHELST

ZEMĚDĚLSKÝ SVAZ **Czech Republic**

AGRICULTURAL ASSOCIATION OF THE CZECH REPUBLIC
ZEMĚDĚLSKÝ SVAZ ČESKÉ REPUBLIKY

Established 6.12.2001

Address of headquarters:	Hybernská, 38 110 00 Praha 1 CZECH REPUBLIC Tel. : +420 226 211 000 Fax. : +420 2 24 225 521 E-mail : aacr@zscr.cz website : www.zscr.cz
President:	Miroslav JIROVSKÝ
Vice(s)-President(s):	Vitězslav NAVRATIL, František TRNKA, Zdeněk HOUŠKA
General Manager:	Martin PÝCHA
Responsible European Affairs:	Miroslav LOUMA
Description of the structure of the organisation	President-Secretary General-Secretariat.
(organisational chart of the decision-making process):	Legal Dpt.- Foreign Affairs Dpt.- Accountancy and Economic Dpt.- Economic Analysis Dpt- Business Activities Dpt.-Consultation Dpt. Educational Institute.
HR (staff/services):	11 people/legal services, avertissement, sponsoring, interpretation and translation, book-keeping, education, EU activities, economic analysis, renting services...
Operational budget :	Approx. 18,144 mil CZK (approx. 700.000 EUR)

Czech Republic ZEMĚDĚLSKÝ SVAZ

Sources of funding (%):	
Members' subscriptions	28%
Consulting activities	24%
Other business activities	18%
State aid or other	30%
Number of co-op members:	1.016 members-individuals, corporate bodies, companies Ltd., agricultural coops and joint-stock companies.
Sectors represented	No data avaialble
Description of the services to members:	Rental services, advertisement, organization of conferences and seminars, economic analysis, legal services, accounting services, translation and interpretation, secretary services, further education, accommodation and tourist services.
Description of how information is communicated to members (including information provided by Cogeca):	By e-mail daily through Secretariat any by regular post one a week.
Cooperation with other organisations and institutions (at regional, European and international level)	Agrarian Chamber of CR, Association of Private Farming of CR, Cooperative Association, Food Chamber of CR-regional level ; Copa/Cogeca and member organisations of C/C, ICA and Europan Parliament-international level.
Priorities for 2010	Stabilisation of Czech agriculture and farmer incomes,solving of problems connected with rural development and transformation, environmental protection, sugar reform, keepi n vivid rural areas and limit further urbanisation.

ZEMĚDĚLSKÝ SVAZ Czech Republic

Main issues and Trends for Cooperatives in the Czech Republic

I. Agricultural Cooperatives:

How would you characterise agricultural Cooperatives in terms of:

Strengths: specific character of economic activity influenced by nature and climatic conditions.

Weaknesses: low number of farmers and small dimension of Czech agriculture.

Opportunities: production of agriculture products with higher added value, tourism, production of bio -fuels, other business activities-tourism, rental activities…

Threats: WTO negotiations and continuing imports of agricultural products from 3rd countries, old age of farmers and decreasing number of them-some 3,7% of Czech population only.

Functions and stakes of the agricultural Cooperatives:
What are currently the main functions/activities (economic, social, cultural, environmental, food safety, rural development …) of agricultural Cooperatives in your Country?

Economic and rural development.

What developments, in these, do you anticipate for the up-coming years?

Social and environmental ones.

II. Legislation:

In your opinion, what are the fundamental specificities that farming Cooperatives must highlight vis-à-vis other types of company?

Specific character of production and ownership of agricultural enterprises.

Comments/ evolution of national cooperative law in the last five years. Is your national legislation an obstacle to some of your activities?

No, our organization takes a part in all legal consultations concerning legislation of agriculture development.

Is national taxation adapted and specific to the type of farming cooperative company? Is it an obstacle to some of your activities?

This year, there was for example green-tax, no obstacle were recognized.

There is a need to reduce social and health taxation

Comments/ evolution of competition law at national and European level? Is it an obstacle to some of your activities?

No.

Czech Republic ZEMĚDĚLSKÝ SVAZ

III. Concentration and the market:

Have you noticed a trend towards concentration in the last five years? Regional, national, European (projected ECS or other types of collaboration)?

No.

Which relations do Cooperatives have with the retail trade (multiples)? Are they themselves active in this area?

Yes, some of our members are distributing and selling their products by themselves / MLECOOP, CZ FRUIT…)

IV Financing:

Is the access to finance sufficient and satisfactory for agricultural Cooperatives? Do Cooperatives need access to specific financing systems?

There is a need for better access to bank credits and short-term loans.

Do Cooperatives need access to specific financing systems?

No, they have to be just treated by banks equally in comparison with other subjects of economy- industry, services.

Do financing institutions (e.g. banks, rating agencies) have sufficient knowledge of the cooperative specificities?

No.

V. Training:

Is it necessary to set up a promotion programme for Cooperatives (national, European)?

Definitely, in order to improve skills and knowledge of farmers, namely of young generation.

What training systems are available to farmers in terms of management of/participation in Cooperatives?

We have our independent Educational Institute with lectors from all the governmental structures. Respective lectures and seminars are performed once e week for at minimum 50 people in cities and towns in every region of our country. These seminars reflect actual situation in CAP, legislation and veterinary and hygiene services.

However in our country exists lectures which are provided by Ministry of Agriculture, by Agriculture University and by Economic and Research Institute.

VI. Development/future of policies:

What impact could the evolution of the CAP (horizon post 2013) have on Cooperatives?

We do hope that bureaucracy will be cut-down or limited; anyhow we expect improved position of European farmers on the world market.

In the context of the agricultural negotiations in WTO what risks and opportunities will impact upon agricultural Cooperatives?

Risk: Increased imports from third countries (quality and food safety)

Opportunity: change of consumer behaviour and concentration on European high quality products.

What should be the positioning/involvement of agricultural Cooperatives vis-à-vis rural development policy and regional policy?

They are the main power of the further rural development

VII. Conclusion: the future

Which main assets and weaknesses of Cooperatives should be instilled to the representatives of the Commission, the Council and the European Parliament?

Keep the multifunctional and sustainable role of European model of agriculture and improve competitive position of farmers and stabilize farmer incomes and quality of life in rural areas.

Czech Republic AGRÁRNÍ KOMORA

CZECH AGRARIAN CHAMBER
AGRÁRNÍ KOMORA ČESKÉ REPUBLIKY

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Responsible for EU Affairs	Mr. Karel MATOUSEK +32(02) 3761081 E-mail: km.agri@skynet.be
President:	Jan VELEBA
Secretary General:	Martin FRANTIŠ

Landbrug & Fødevarer **Denmark**

DANISH AGRICULTURAL & FOOD COUNCIL
Landbrug & Fødevarer

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President:	Michael BROCKENHUUS– SCHACK
Secretary General:	Carl AAGE DAHL
Executive Director & Responsible European Affairs:	Claus SØGAARD RICHTER

DRV Germany

GERMAN RAIFFEISEN ASSOCIATION
DEUTSCHER RAIFFEISENVERBAND E.V. (DRV)

Organisation founded: 18 November 1948

Headquarters:	Adenauerallee 127 53113 Bonn GERMANY Tel.: +49-228-106-0 Fax: +49-228-106-266 Pariser Platz 3 10117 Berlin GERMANY Tel.: +49 30 85 62 14 43 Fax: +49 30 85 62 14 55 info@drv.raiffeisen.de http://www.raiffeisen.de
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President :	Manfred NÜSSEL
Vice-Presidents:	Michael BOCKELMANN Claus-Peter WITT Dr. Clemens GROßE FRIE Franz-Josef MÖLLERS
Secretary General:	Dr. Rolf MEYER
Responsible European Affairs:	Dr. Thomas MEMMERT
Structure of the organisation: (Decision-making process)	DRV is the association of the German Raiffeisen Cooperatives that are exclusively or predominantly active in agriculture. The direct members are 7 regional cooperative organisations and 7 central cooperative companies. Individual Cooperatives are grouped in one of the 7 Regional organisations.

Germany DRV

Discussions and decisions concerning specific commodities or sectors are prepared in 6 specialist committees. These committees are advised by a whole number of sub-committees.

The specialist committees operate under the umbrella of the Praesidium which is the decision-making authority and is managed by the

Presidency, i.e. the President and the Vice-Presidents.

The main opinion-forming body is the General Assembly which takes place as an assembly of delegates.

Operating budget (2009):	Ca 6,6 Million €
Financial resources (%): Membership fees « Consulting»	Main source of funds are : Members' subscriptions (85%) ;
Other business activities State aid and others	no State aid.
Number of associated Cooperatives	2.994 (2008)
Sectors represented (number + %): Multi-purpose	Multi-sector: 178 credit Cooperatives developing also trade activities (5,9%).
Livestock products (detail)	Livestock production: 290 dairy Cooperatives (9,7%), (62 of them are processing Cooperatives); 116 cattle and meat Cooperatives (3,9%).
Plant products (detail)	Crop production: 356 purchase and sales Cooperatives (11,8%); 218 wine Cooperatives (7,3%); 94 fruit, vegetable and horticultural Cooperatives (3,1%). Primary agricultural production: 872 agricultural Cooperatives (in new "Länder"), (29,1%). Services: 863 miscellaneous sales and service Cooperatives (28,8%), (e.g. fishery and electricity Cooperatives). 7 cooperative centres.

Collaboration with other organisations and institutions (at regional, national, European, international level)	Membership of the regional cooperative organisations in DRV. Close contact with sector organisations at national level (member of the "Deutscher Bauernverband" – German Farmer's Union – and other agro-economic organisations). At European level, member of Cogeca and the European Dairy Association (EDA) and, at international level, of the International Raiffeisen Union (IRU).
Priorities for 2010:	CAP –post 2013. Supply relationship between milk producers and dairy Cooperatives. Risk management for cooperative companies in the light of new market situations. European and national rules for GMO's. Policy for renewable energies.

Main Issues and Trends for Cooperatives in Germany

I. How would you characterise agricultural Cooperatives in terms of:

Strengths

They strengthen the market position of their members (farmers) thereby improving the competitive position. This occurs on the one hand from a sales perspective, through concentrating the supply of agricultural production and creating increased added value through processing. On the other hand, this also occurs from a purchasing perspective, through the collective purchase of inputs, which are cheaper as a result.

There is the opportunity for both cooperative members and users (customers) to have influence over the business policy (self governance through election of voluntary positions).

Weaknesses

There are limits to the classic instrument of financing agricultural cooperatives by means of members' (farmers') shares in the business.

For larger cooperative businesses, ensuring the inclusion of members in the business policy takes considerable effort.

Opportunities

Through close contact with members and suppliers, agricultural cooperatives are very well suited to the food and feed chain, as they can ensure traceability and adherence to particular quality standards of agricultural products.

The changing European and global market situation for many agricultural commodities opens up new markets for many cooperatives (e.g. renewable energies and exports to third countries in response to the increasing demand for more processed products.)

Threats

The concentration process in both the food retail sector and the supplier industry (plant protection products, fertilisers, agricultural technology) is advancing rapidly. Structural change at cooperative level must follow suit to avoid cooperatives being left at a competitive disadvantage. Currently, increasing costs (e.g. for energy) are not always successfully transferred to an adequate extent to buyers, in particular the food retail sector.

Increasing volatility on the global agricultural commodities markets expose cooperatives which market their products to greater price risks. In response to this, they must put the appropriate risk management systems in place.

Germany DRV

Functions and stakes of the agricultural Cooperatives:

What are currently the main functions/activities (economic, social, cultural, environmental, food safety, rural development ...) of agricultural Cooperatives in your Country?

First and foremost, agricultural cooperatives serve an economic function for their members. This includes grouping supply, increasing the value-added of agricultural products as well as providing inputs for farmers. Within the food supply chain, cooperatives therefore play an important role. In rural areas, cooperatives have an important function above and beyond classic agriculture (a partner to farmers), supplying the non-agricultural community (e.g. petrol stations, homeware and hardware stores). Furthermore, cooperatives create jobs in rural areas, in this respect serving a social function.

What developments, in these, do you anticipate for the up-coming years?

In the coming years, agriculture will become all the more dependent on strong and competent partners for the marketing of production, owing to significantly reduced state intervention on the agricultural markets. As such, cooperatives as “farm-owned businesses” will have an even greater responsibility. In view of increasing competitiveness they must continually strive to improve their own economic performance, not least by means of mergers. This would help to accelerate the structural transformation of cooperatives

I. Legislation

In your opinion, what are the fundamental specificities that farming Cooperatives must highlight vis-à-vis other types of company?

Cooperatives are essentially an alliance of people, which contrary to public limited companies are not centred around capital (shareholder value) but on personal involvement, which is a central principle. Cooperative owners are generally their customers too. The business objective of a cooperative is primarily to promote its members.

Comments/ evolution of national cooperative law in the last five years. Is your national legislation an obstacle to some of your activities?

In Germany, the legal framework (cooperative law etc.) does not present any major obstacles to the activities of cooperatives.

Did any changes in national cooperative law occur in your Country in recent years (e.g. since 2003)?

Cooperative law, which provides the legal framework for the activities of cooperatives in Germany, was revised in 2006. For example, the establishment of new cooperatives was facilitated and greater flexibility in terms of voting rights was provided for. European legislation on cooperatives e.g. on member investment and minimum capital was also transposed

Is your national taxation system adapted to the specificities of agricultural Cooperatives? Does it constitute an obstacle to some of your activities?

Agricultural cooperatives in Germany are only entitled to tax relief under certain, very limited conditions. The majority of cooperatives and those with the greatest turnover are not eligible for this privilege and are taxed in the same way as other forms of company.

DRV Germany

Regarding your national taxation system please indicate the areas that should be reviewed/changed.

In 2007, changes to legislation on company taxation were passed in Germany. As such, corporate tax was reduced for public limited companies in 2008, whilst business tax obligations were largely increased. Tax law is very complicated in Germany, posing various individual problems for cooperatives. Considerable simplification of tax law in general would be helpful.

Is competition law at national and/or European level is an obstacle to some of your activities? If so please specify.

In the past, individual cases of cooperative mergers proved problematic as a result of the rigid interpretation of competition law by the national cartel authority.

II. Financing:

What are, in the opinion of your organisation, the current main obstacles/difficulties in access to finance by agricultural Cooperatives?

The most important financial instrument for cooperatives continues to be the subscribed capital of members. However, in light of the often constrained financial situation of farmers (high need for investment etc.) as well as recurrent structural change, any further increase in shares is limited.

IAS 32 (International Accounting Standard) regulations limiting own and borrowed capital have led to problems for cooperative businesses, as subscribed capital is generally seen as borrowed capital, owing to its terminable nature. Until now, attempts to resolve the issue by the IASB within the framework of IFRIC 2 (members' shares in cooperative entities) have not proven satisfactory, with a need for further consultation. It must also be ensured that international accounting standards are transposed by means of rules that can be generally implemented by SMEs.

Do Cooperatives need access to specific financing systems?

In view of the fact that the classic instrument of shares in agricultural cooperatives is confronted with multiple limitations, it is worth considering alternative ways of strengthening the equity base of cooperatives. One way of encouraging members to subscribe increased capital, would be through interest payments (increased incentive for subscribers). A further way of stabilising the equity base and avoiding capital withdrawal would be through non-terminable reserves on business profits (profit retention). Another option which remains an under-used alternative, is to create jouissance right capital. Owing to the level of contractual freedom it provides, this constitutes a very flexible instrument which can encourage greater financial participation from members on a voluntary basis.

Do financing institutions (e.g. banks, rating agencies) have sufficient knowledge of the cooperative specificities?

In general, banks and rating agencies are well aware of the particular nature of cooperative businesses. However, it must nonetheless be borne in mind that in Germany, traditional cooperative banks play an important role in financing agricultural cooperatives. Indeed, the general problems faced by SMEs in relation to the Basel II Accord on Ratings should also be considered.

Germany DRV

III. Training:

Is it necessary to set up a promotion programme for Cooperatives (national, European)?

In 2004, the EU Commission published a communication on promoting cooperatives, which recognised their significant role in the European economy and society. Regrettably, the proposals of different promotion measures have not been taken on board. Cogeca, together with other European cooperative organisation should urge the EU Commission to put concrete programmes in place. In principal, responsibility for promoting cooperatives would be foreseen at national level. In Germany, the cooperative model is promoted and communicated (e.g. through publications) on a regional and national level by cooperative associations. This has led to an increasing number of new cooperative businesses being set up in sectors where the model would not traditionally be prevalent. Furthermore, a growing number of universities are beginning to look into specific aspects of cooperativism.

What training systems are available, in your Country, to farmers in terms of management of/participation in Cooperatives?

In Germany, there is a broad range of training measures for those with voluntary and full-time responsibilities within cooperatives. Such cooperative training opportunities are offered at both regional and national level.

Are some of them run by your organisation?

It is not the DRV that is responsible for the implementation of such training programmes at national level, but central cooperative academies. However, the DRV is involved in the development of such initiatives (e.g. the business management training programme for junior employees and training for voluntary workers).

IV. Development/future of policies:

What impact could the evolution of the CAP (horizon post 2013) have on Cooperatives?

A fundamental turning point for the CAP came in 2003 with the decision to decouple direct payments from production. The influence of direct payments on market developments was significantly reduced as a result. Moreover, with the 2003 and 2008 (Health Check) reforms, Community market support measures (intervention, export refunds, promotion support on the internal market) were majorly cut back in various areas, or completely dismantled. This trend will continue in the years to come, for example with the phasing out of milk quotas in 2014/2015. The consequences are likely to be increased market volatility for agricultural products. In future, cooperatives as marketing organisations will have an even more important role to play, ensuring an adequate and stable income for farmers whilst systematically opening up new market opportunities. At the same time, greater fluctuation on the agricultural markets will present internal risks for marketing businesses.

In the context of the agricultural negotiations in WTO what risks and opportunities will impact upon agricultural Cooperatives?

Following the withdrawal of export subsidies, the competitiveness of the EU agricultural sector on third country markets will be reduced. Attempts to lessen external protection for many products will lead to increased imports into the Community. This will mean greater volumes and pressure on prices on the EU internal market. Despite this negative trend, there is the positive aspect of greater liberalisation on the global agricultural markets, offering the possibility of new markets being opened up for the EU agricultural sector. Examples include the dynamic increase in demand for more processed agricultural products in countries such as China and India. Cooperatives must exploit this potential.

What should be the positioning/involvement of agricultural Cooperatives vis-à-vis rural development policy and regional policy?

Rural development measures must be used to improve the competitiveness of the EU agricultural sector. In this respect, marketing and processing is of particular significance. Investment by cooperatives in innovative areas e.g. in quality assurance, must be promoted. It would also be worthwhile lending support to studies which look into new marketing strategies or improving marketing structures.

V. Conclusion: the future:

Which are the main messages that Cogeca should relay to the representatives of the Commission, the Council and the European Parliament?

As a lobbying organisation, Cogeca must defend the long-term interests of agricultural cooperatives to the EU institutions in various political domains. Current issues can be found in the Cogeca working programme for the upcoming period.

ESTONIAN FARMERS FEDERATION
EESTIMAA TALUPIDAJATE KESKLIIT

ETKL

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President:	Arvo VEIDENBERG,
Managing Director:	Kaul NURM

Estonia EESTI ÜHISTEGELINE LIIT

ESTONIAN COOPERATIVE ASSOCIATION
EESTI ÜHISTEGELINE LIIT

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General Director	Valdek KRAUS

PANHELLENIC CONFEDERATION OF UNIONS OF AGRICULTURAL COOPERATIVES (PASEGES)

ΠΑΝΕΛΛΗΝΙΑ ΣΥΝΟΜΟΣΠΟΝΔΙΑ ΕΝΩΣΕΩΝ ΑΓΡΟΤΙΚΩΝ ΣΥΝΕΤΑΙΡΙΣΜΩΝ (ΠΑΣΕΓΕΣ)

Date of establishment: 1935

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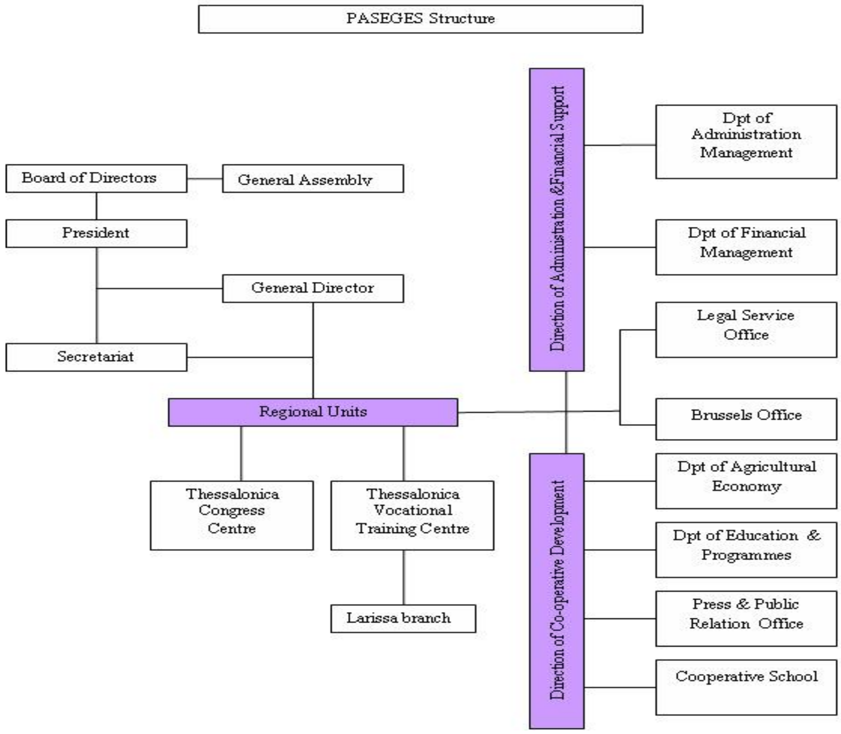
Secretary General:	Achileas KARAGIOZOPOULOS
Responsible European Affairs:	Ioannis TSIFOROS (General Director) Ioannis KOLYVAS (Head of Brussels' office)
HR (staff/services)	11 economists, 7 agronomists, 3 engineers, 1 mass media expert, 2 Inf. system analysts, 3 lawyers, 12 administrative staff Plus 6 independent collaborators (journalists)
Amount of co-op members	138 (111 Unions of Agr. Coops plus 27 cooperative SAs and Central Unions)

Sectors represented (amount + percentage)	No	%
Multi-sector;	106	76,8%
Single sector (livestock products);	4	2,9%
Single sector (vegetal products);	27	19,6%
Services.	1	0.7%

Greece PASEGES

Description of the structure of the organisation

(organisational chart of the decision-making process)



Operational budget	(2009) 6.382.000 €	(2008) 6.485.000 €
Sources of funding:		
Members' subscriptions (%)	790,000 € 12%	944.000 € 15%
Consulting activities (%)	0 €	0 €
Other business activities (%)	3.567.000 € 56%	3.404.000 € 52%
State aid or other (%)	2.025.000 € 32%	2.137.000 € 33%

Description of the services to members:	Representation to third parties Scientific and technical support, consultancy services for their organisation and development -Co-ordination of their economic and business activities on national and international level
Description of how information is communicated to members	-the portal of PASEGES (www.paseges.gr) - conferences with the members concerned -letter-writing, - e-mail
Cooperation with other organisations and institutions	COGECA, COPA, UNITAB, MEDISAMAK, CCRMED
Priorities for 2010	-establishment of a new model for water management in agriculture -Support to the UACs in order to confront the economic crisis -promotion of agricultural cooperative products in cooperation with a retailer.

AGRI-FOOD COOPERATIVES
COOPERATIVAS AGRO-ALIMENTARIAS

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Vice-Presidents:	Josep PERE COLAT
	José VICENTE TORRENT CORS
Director-General:	Eduardo BAAMONDE NOCHE

Spain Cooperativas Agro-alimentarias

Main Issues and Trends for Cooperatives in Spain

Agricultural Cooperatives:

How would you characterise agricultural Cooperatives in terms of:

Strengths:

Agricultural cooperatives are the main tool for farmers to be more competitive in an open market creating economy of scales. They are the best placed in the rural areas to join the different steps along the food chain under one single entity, ensuring the unity of the process and getting more added value. Cooperatives advice their members to improve their productions and competitiveness. About social aspects, cooperatives organize professional and education programs, introduce the farmers in a complex and exigent agri-food system.

Weaknesses:

Their structure, still based in production, reduce their competitiveness impeding their participation along the food chain. Lack of flexibility of its self financing system. Unequal Social base and not much professionalize.
Conflict between the individual members and cooperative interest.
Lack of entrepreneurial training for President and Cooperative Board's members.

Opportunities:

New strategy, food chain development, a new entrepreneurial vision: *going from the consumer to the production and not vice versa.* Their strategic position allows them to be along the food chain.

Threats:

Globalisation imposes fast changes in front of rigid and slow process on cooperative life.
Continuous changes in the CAP policies give less legal security.
Short terms visions are incompatible with cooperative strategy, this is mainly an internal problem, the members prefer good price in their productions instead a long term investment strategy.

Functions and stakes of the agricultural Cooperatives:

What are currently the main functions/activities (economic, social, cultural, environmental, food safety, rural development ...) of agricultural Cooperatives in your Country?

Farming cooperatives is an enterprise which its main activity is to commercialize the member's productions; therefore its main function is economic. However, the cooperative's principles have an important social and rural development role, they have legal obligations as they are the compulsory founds in favour of education and cooperative movement. Cooperatives are often the only enterprises existing in rural areas; therefore they are a real rural development motor.

What developments, in these, do you anticipate for the up-coming years?

Agricultural Cooperatives must to face the market, more competitive and globalized, and concentration by suppliers and retailers. Agricultural cooperatives need merging process of their cooperative structures to improve competitiveness. Fewer producers due to CAP reforms and older social base will be a problem for cooperatives in the coming years. Renovation in the social base should be taking into account. Cooperatives should face the market management in absence of public measures.

Legislation:

In the opinion of your organisation, what are the fundamental specificities that agricultural Cooperatives must highlight vis-à-vis other types of companies?

Cooperatives involve social aspects, a clear example is the Education and Promotional Found which is obligatory and not sharing found among the members even in case of dissolution of the cooperative.
They are enterprises linked to the rural areas, therefore they can't delocalize because their owners are their suppliers at same time, the farmers.

Is national legislation an obstacle to the activities of your organisation?

Spain has a specific national law for cooperatives. However there are 14 other different cooperative laws. According to the regions (Comunidades Autónomas) laws which suppose an obstacle to encourage merging process among cooperatives from different regions.
In the other hand, this political regional structure is an obstacle to get founds from the rural development programs. Agriculture is a competence in hand of the Regional administrations and they are not interested in financing projects which go beyond the regional limits.
Due to their own capital and financing structure the constitution of compulsory founds are bigger than the capital enterprises.

Did any changes in national cooperative law occur in your Country in recent years (e.g. since 2003)? If so please specify.

No.

Is your national taxation system adapted to the specificities of agricultural Cooperatives? Does it constitute an obstacle to some of your activities?

Yes, it is adapted.
An agricultural cooperative cannot develop more than 50% in one activity being an extra cooperative one, so they are already limited.

Regarding your national taxation system please indicate the areas that should be reviewed/changed.

To consider all cooperative operations as cooperative activity, to avoid a difference between internal and external operation would simplify the tax and accounting system.

Is competition law at national and/or European level an obstacle to some of your activities? If so please specify.

Yes it is an obstacle in the last years. CNC (Spanish Competition Authority) is not considering the specificity of the sector, and their main objective is to get lower price to consumers without taking into account the durability of the producing sector, any vertical agreement through representative organisations or inter-branch organisation is attacked by the competition authority because they are considered to manage the market without any legal base. The only way to avoid this attack is to concentrate the activity on enterprises through producer organisation, taking into account that they would be enterprises dealing with other stakeholders in a normal market activity.

Spain Cooperativas Agro-alimentarias

Financing:

What are, in the opinion of your organisation, the current main obstacles/difficulties in access to finance by agricultural Cooperatives?

The composition of the social capital is variable and it exists an excess of obligatory contributions to not sharing founds which obstacle the possibility to obtain financial resources.

Do Cooperatives need access to specific financing systems?

The problem is to eliminate limitations more than having a special financing system.

Do financing institutions (e.g. banks, rating agencies) have sufficient knowledge of the cooperative specificities?

Only those which are placed in the rural areas like credit cooperatives, rural saving banks.

Training:

Is it necessary to set up a promotion programme for Cooperatives (national, European)?

One of the cooperative principles is to promote education on the cooperative system, promotion of these kind of programs is always needed.

What training systems are available, in your Country, to farmers in terms of management of/ participation in Cooperatives?

Only a few. At the University level it exists some treatment inside Commercial Law Departments.
Moreover, the professional education for farmers lack of items like societal forms, not only in terms of cooperatives.

Are some of them run by your organisation? If so please specify.

Cooperativas Agro-alimentarias is organizing education modules for farmers being part of the President Boards of the cooperatives.
Cooperativas Agro-alimentarias is engaged in continuous education programs.

Development/future of policies:

What impact could the evolution of the CAP (horizon post 2013) have on Cooperatives?

More competition from imports. Cooperatives should invest in added value products and cover consumer needs.
Serious risk of abandon of the activity by farmers will be a challenge in the rural areas; they are the base of the cooperatives. Young farmers with an entrepreneurial vision are needed.
Less market management tools will produce more price volatility and instability. Cooperative must play an intervention role to manage de market.
The decision if to produce or not won't be linked to a direct payment. Market appreciation by the farmer will be fundamental to take a decision.

In the context of the agricultural negotiations in WTO what risks and opportunities will impact upon agricultural Cooperatives?

Risks: open market, less protection, not protection of non-market questions (environment, origin denomination, animal welfare, etc...) which is the added value of the European Model of Production.
New markets mean new opportunities in a world with a growing demand on food.

What should be the positioning/involvement of agricultural Cooperatives vis-à-vis rural development policy and regional policy?

Cooperatives are already a fundamental tool for the economic development in the rural areas, however the objectives of competitiveness in the RD policy are not enough taken into account. Any development of agricultural cooperatives will mean economic development of the area.

Conclusion: the future:

Which are the main messages that Cogeca should relay to the representatives of the Commission, the Council and the European Parliament?

Producer Organisations, mainly cooperatives, and offer concentration is the main tool for farmers in an open and more competitive and global market.
Measures in order to structuring production are needed to get a better balance in the negotiation power between suppliers, production, industry and retailers.
Due to their strategic position, producer organisations should play an essential role in the market management if public intervention is not in place. The objective is to ensure incomes to the farmers coming from the market and not from the direct payments.
If the message of the European Commission is to be more competitive it is not logic to limit some kind of aids to Small and Medium Enterprises, , for example those addressed to improve competitiveness in the axe 1 of the RD Programs, without taking into account that cooperatives has a big social base behind them.

Other comments...

Competition rules should be adapted to the agri-food sector. The elimination of production management tools have produced the elimination of the legal exceptions for the sector which is doubly penalized, price volatility and imbalance in the food chain when they are negotiating with suppliers and clients, highly concentrated.

COOP DE FRANCE

3 December 2003
[(formerly Confédération Française de la Co-opération Agricole (CFCA)]

Headquarters:	43 Rue Sedaine CS 91115, 75538 PARIS, Cédex 11, FRANCE Tel.: +33 1 44 17 57 00 Fax: +33 1 48 06 70 30 e-mail: mnbruchet@coopdefrance.coop web-site: www.coopdefrance.coop
Liaison Office in Brussels :	Avenue des Arts 1-2, bte 9 BE - 1210 BRUXELLES Tel: +32 2 285 43 89 Fax: +32 2 219 09 89
Responsible European Affairs:	Isabella MARINUCCI e-mail: isabella.marinucci@coopdefrance.coop
President:	Philippe MANGIN
Vice-Presidents:	Hubert GRALLET, Gilbert HERPE
Director General:	Yves LE MORVAN
Human resources (staff/service)	The 55 members of staff at Coop de France are distributed as follows: • 1 animal section (made up of “livestock and meat”, “poultry farming” and “animal nutrition”) • 1 cereals section (made up of “grain professions” and “dehydration”) • 2 boards: legal and fiscal matters, social issues • 2 departments: sustainable development, Industry-Retail-Consumption
Budget (2009):	9 million €
Sources of funding	• Membership fees 60 % • Consulting activities 0 % • Other commercial activities 20 % • National aid and other 20 %
Number of members:	3000 cooperatives

France COOP DE FRANCE

Description of the organisation's structure	**Board (30 members)** **Committee (15 members)** **Director General** **Management Committee (6 persons)** **55 members of staff**
Description of the services provided to members	Coop de France's objective and mission are: • to promote and add value to the specific characteristics of cooperatives and cooperative groups within agriculture, agri-food and agri-industry, in their economic roles at regional, national, European and global level • to promote and defend the following professions: ♦ collection, storage, marketing of seeds, cereals, oil seed and protein crops, distribution of agricultural produce and processing cereals and other soil products ♦ manufacture and marketing of animal feed ♦ organisation of production, collection, standing sale, cattle slaughter as well as the preparation and sale of meat, processed products and by-products from these slaughters ♦ collection, live sales, poultry slaughters as well as the preparation and sale of meat, processed products and by-products from these slaughters ♦ production and manufacture of dried fodder • to make French agri- cooperatives' voices heard and to increase their influence • to contribute to developing agriculture by supporting agri- cooperative members
Description of the system for providing information to members	INTRANET – EXTRANET Letters on specific topics (taxation, social issues, sustainable development, quality, European matters, etc.) A general monthly letter: COOP DE FRANCE ACTU A monthly publication: COOP DE FRANCE INFOS
Cooperation with other organisations and institutions	<u>At national level</u> Professional agricultural trade unions (FNSEA, Young Farmers, etc.) Ministries (Agriculture, Environment, etc.) Other agricultural organisations (offices, inter-professional organisations, technical institutes, research bodies, etc.) <u>At European level</u> Coop Europe (cooperative status), COCERAL (cereals profession) FEFAC (animal nutrition), BEAF
Priorities for 2010	Preparing for the reform of the Common Agricultural Policy Law modernising agriculture and forestry (draft adopted in July 2010) Defending cooperatives, including matters related to taxation Developing contacts with European cooperatives

ICOS Ireland

Irish Cooperative Organisation Society Ltd.– ICOS

Address of headquarters:	Irish Cooperative Organisation Society Ltd. The Plunkett House, 84 Merrion Square Dublin 2 IRELAND Tel: +353 1 676.47. 83 Fax: +353 1 662.45.02 web-site: www.icos.ie
Liaison Office in Brussels:	Rue de Trèves 61 BE-1040 Brussels Tel: +32 2 231.06.85 Fax: +32 2 231.06.98 e-mail: mail@icosbrussels.be
President:	Patrick MCLOUGHLIN
Vice-President:	Bertie O'LEARY
Secretary-General:	John TYRRELL
Responsible European Affairs:	Conor MULVIHILL
Description of the structure of the organisation (organisational chart of the decision-making process):	ICOS itself is a cooperative. It is directed and controlled by a Board of 12 Members. These member Cooperatives number over 150 and represent an individual membership of over 150,000 people.
HR (staff/services):	ICOS has 14 staff located at the Head Office in Dublin, in the Regional office in Cork and the Brussels office.
Sources of funding (%): Members' subscriptions Consulting activities Other business activities State aid or other	 ICOS is mainly funded from its member organisations ICOS is not state funded

Ireland ICOS

Description of the services to members:	ICOS provides the following services to its member Cooperatives: policy and analysis: ICOS adopts policy positions on many issues which affect the sector and pursues these issues with the Department of Agriculture, Fisheries and Food and the European Commission provides analysis on dairy, livestock, trading, environmental and regulatory issues strategy support for the dairy and livestock sector business advisory services, e.g. consultancy, business reviews and strategy development provides information, advises and lobbies on dairy, livestock and business matters provides information to Cooperatives on EU issues administers multi-employer pension schemes and provides advice to Cooperatives Training & Development: ICOS Skillnets ICOS has hosted and promoted the ICOS Skillnet training & development initiative for the past two years and its application for further funding under the Skillnets Networks Program 2010/11 has been approved. The initiative is based on the need to invest in up-skilling and enhancing the skills of Co-op staff & management through structured customised and industry-specific training in order to sustain competitiveness and growth for the sector. The ICOS Skillnet offers a wide range of uncertified courses and an ever increasing number of certified programs such as Diploma in Corporate Direction (Food Business) for Co-op Directors and Senior Management, Diploma in Retail Management for Co-op branch managers.
Cooperation with other organisations and institutions (at regional, European and International level):	ICOS cooperates with a plethora of other organisations including co-op related organisations in Ireland, the EU and third countries, research centres, related Irish government departments, Northern Ireland organizations, Cogeca, all EU institutions. Associated organizations include Cogeca, I.F.C.D (Irish Foundation for Cooperative Development), The Plunkett Foundation, The National Forum of Cooperatives
Priorities for 2010:	Future strategy for Irish Agri Cooperatives, feed, changes to rules in Cooperatives, providing targeted training to Cooperatives, future of CAP post 2013, implementation of Health Check measures, Energy and Climate Change mitigation efforts, impact of ETS on members, review of Animal Transport Regulation

ICOS Ireland

Agricultural Cooperatives:

How would you characterise agricultural Cooperatives in terms of:

Strengths:

Customer loyalty; there is a purchasing power in Cooperatives.

Weaknesses:

There is a weakness which may be uniquely Irish but there is a tolerance of cooperative members who are not actively trading.

Opportunities:

Carbon trading, future of value added products and diversification.

Threats:

Lack of appreciation by the members as to the importance of the cooperative entity in the market place on his/her behalf.

Functions and stakes of the agricultural Cooperatives:

What are currently the main functions/activities (economic, social, cultural, environmental, food safety, rural development ...) of agricultural Cooperatives in your Country?

Dairy, livestock markets, fishing, group water schemes, stores and wholesales, AI and cattle breeding, rural development, tourism and Gaeltacht societies.

Legislation:

Functions and stakes of the agricultural Cooperatives:

What are currently the main functions/activities (economic, social, cultural, environmental, food safety, rural development ...) of agricultural Cooperatives in your Country?

Dairy, livestock markets, fishing, group water schemes, stores and wholesales, AI and cattle breeding, rural development, tourism and Gaeltacht societies.

In your opinion, what are the fundamental specificities that farming Cooperatives must highlight vis-à-vis other types of company?

Democratic control and user ownership

Did any changes in national cooperative law occur in your Country in recent years (e.g. since 2003)? If so please specify.

2005: The financial limit that individual shareholders or companies can invest in a co-op has been increased to €150,000.00 or 1% of the total assets of the cooperative.

Is national taxation adapted and specific to the type of farming cooperative company? Is it an obstacle to some of your activities?

No

Does it constitute an obstacle to some of your activities? :

Regarding your national taxation system please indicate the areas that should be reviewed/changed.

There are no areas that should be reviewed or changed.

Ireland ICOS

Is competition law at national and/or European level is an obstacle to some of your activities? If so please specify.

Yes, this is probably the biggest obstacle. It is difficult for COOPERATIVES to merge due to competition law and a lot of Irish Cooperatives are more export orientated than just focussing on domestic market.

II. Concentration and the market:

Have you noticed a trend towards concentration in the last five years? Regional, national, European (projected ECS or other types of collaboration)?

In regard to cooperative concentration, yes there has been some amalgamation activity in the dairy sector and there is evidence of increasing operational collaboration between dairy Cooperatives in an effort to improve their cost base.

Which relations do Cooperatives have with the retail trade (multiples)? Are they themselves active in this area?

In regard to other sections of the food chain, there has been an expansion of presence on the part of European low cost retail chains such as Lidl and Aldi with further concentration on the part of smaller retail stores into wholesale franchise operations.

Relations with multiples are functional but there is a strong perception on the part of food Cooperatives that they are the weaker partners in this market relationship.

III. Functions and stakes of the agricultural Cooperatives:

What are currently the main functions/activities (economic, social, cultural, environmental, food safety, rural development ...) of agricultural Cooperatives in your Country?

Dairy, livestock markets, fishing, group water schemes, stores and wholesales, AI and cattle breeding, rural development, tourism and Gaeltacht societies.

IV. Financing:

What are, in the opinion of your organisation, the current main obstacles/difficulties in access to finance by agricultural Cooperatives?

In general, access to credit for all business types is difficult to access at the moment from credit institutions, i.e. banks. The current world credit crunch is having a severe impact on lending in Ireland. Cooperatives such as group-water-schemes are non-profit and have to go to members and government for finance. Larger Cooperatives have large asset portfolios (land, buildings, shares, etc.) and can leverage them off through debt finance. If you have assets, the structure makes no difference.

Do Cooperatives need access to specific financing systems?

There are only two financing systems, debt or equity. Everything else is a subset of that.

CONFCOOPERATIVE **Italy**

NATIONAL FEDERATION OF AGRICULTURAL AND AGRIFOOD COOPERATIVES
FEDERAZIONE NAZIONALE COOPERATIVE AGRICOLE ED AGROALIMENTARI

Headquarters	Via Torino, 146 – 00146 Rome ITALY Tel.: +39 06 469781 Fax: +39 06 4881469 e-mail: fedagri@confcooperative.it web-site: www.fedagri.confcooperative.it
Liaison Office in Brussels	Square Ambiorix 32, bte 35 BE-1000 Brussels Tel.: +32 2 2352860 Fax: + 32 2352869 e-mail: bruxelles@confcooperative.coop
President:	Maurizio GARDINI
Vice-President / Presidents:	Valerio POI, Antonio PIVA, CIRO FANZO, Piergiorgio LENZARINI
Director:	Fabiola DI LORETO
Responsible European Affairs:	Leonardo POFFERI
Description of the structure of the organisation (organisation chart of the decision-making process):	President Director Presidency Board National Council Sectoral Committees

Italy CONFCOOPERATIVE

Human Resources (staff/service):	13
Operational budget (2007):	The Federation has no autonomous budget. Financially, it depends on its organisation (Confcooperative) in which it is a specialist lobby for the agricultural sector.
Financial resources (%):	
subscriptions from members	100%
advisory activities	-
other commercial activities	-
national and other aids	-
Number of member Cooperatives:	3.620
Sectors represented (number + %):	
Dairy	671 (18.5%)
Fruit, vegetables and flowers	594 (16.4%)
Forestry and multi-functionality	143 (4.0%)
Wine	423 (11.7%)
Livestock	385 (10.6%)
of which	
Collective stalls	110
Various livestock	174
Cooperative slaughter	64
Poultry and rabbits	437
Agriculture and services	1404 (38.8%)
of which	
Olives	190
Agricultural services and organisations	1175
Tobacco	39

CONFCOOPERATIVE Italy

Description of services provided to members:	In line with the general orientation of the Confederazione Cooperative Italiane (Confcooperative), Fedagri defines the political trade union lines and organisational principles for the agricultural and agri-food sector. It is responsible for promotion, assistance and services necessary for the development of associated cooperative businesses. In agreement with Confcooperative, Fedagri represents and protects its members at the Institutions, at other organisations operating in the same sector and at national and Community bodies and organisations.
Description of the information communication system towards the members (incl. information from Cogeca):	The system for communicating information to member cooperatives as well as to national bodies utilises the following: Telephone, fax, email, post
Co-operation with other organisations and institutions (regional, national, European and international):	<u>On a national and regional level</u>: with legislative and administrative authorities; with other agricultural, industrial and trade organisations; with bodies, businesses, universities and institutes. <u>On a European and international level</u>: Copa-Cogeca; EU Advisory Committees; European Parliament; European Commission; Permanent Representation of the Italian government; Economic and Social Committee and the FAO.
Priorities for 2010	promoting the expansion of the system of agricultural and agri-food cooperatives (increasing capital, optimising entrepreneurial capacity and innovation, internationalisation etc.). guaranteeing local assistance and services to cooperative members and their associated producers. developing a communication network with all associated cooperatives. promoting new agricultural cooperation based on the opportunities presented by rural development and multi-functionality. developing training courses for members and managers of the agricultural cooperative movement. promoting typical produce and cooperative produce with designation of origin status. promoting and developing a project for selling cooperative produce direct to consumers by creating a network of points of sale within businesses.

Italy LEGACOOP AGROALIMENTARE

NATIONAL ASSOCIATION OF AGRIFOOD COOPERATIVES FOR RURAL DEVELOPMENT
ASSOCIAZIONE NAZIONELE COOPERATIVE AGROALIMENTARI PER LO SVILUPPO RURALE
LEGACOOP AGROALIMENTARE

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Liaison Office in Brussels:	Square Ambiorix, 32 bte 2 BE- 1000 Bruxelles Tel: +32 2 5143849 Fax: +32 2 5143843
Responsible European Affairs:	Sabrina LUISE E-mail: s.luise@legacoop.be E-mail 2: bruxelles@legacoop.be
President:	Giovanni LUPPI
Vice(s)-President(s):	Miriano CORSINI, Tommaso INNOCENTI
Director-General:	Giuseppe PISCOPO
Description of the structure of the organisation (organisational chart of the decision-making process):	National Council ►Executive Council ►President ►Vice-President ►General Management ►Operational Management (Responsibility for each sector)
HR staff (staff/service):	Ammassari Gabriella, Bolini Gina, Maretti Cristian, Montanari Giovanni, Sourin Valentina
Sources of funding (%): Members' subscriptions Consulting activities Other business activities State aid or other	 100%
Number of co-op members:	1.119 (2009)

LEGACOOP AGROALIMENTARE Italy

Sectors represented (number + %): Multi-sector; Livestock production (retail) Crop production (retail) Services.	Primary sector (multifunctional)	430	38%
	Milk sector	105	9%
	Meat (beef + porc)	124	11%
	Arable crops	55	
	Fruits and vegetables	129	12%
	Olive-oil	76	7%
	Wine	94	8%
	Other sectors (services)	161	14%

Description of the services to the members:

Legacoop Agroalimentare promotes, represents, assists and coordinates all the associated cooperatives, in order to sup-support agricultural production, through modern and efficient enterprises.

Description of how information is communication to members (including information provided by Cogeca):

Communication is channelled through e-mail correspondence and publications on the web-site.

Cooperation with other organisations and institutions (at regional, European and International level)

At the International level, member of the ICA,
At the European level, member of Cogeca and at the National level, participation at the national coordination forum along with the rest of the national cooperative organisations in the country.

Priorities for 2010

Integration and aggregation of cooperatives.
Internationalisation of cooperatives.
Promotion of the multifunctional role of agriculture in cooperatives.
Overcome the (current economic) crisis.

Italy LEGACOOP AGROALIMENTARE

Main Issues and Trends for Cooperatives in Italy

Agricultural Cooperatives:

How would you characterise agricultural Cooperatives in terms of:

Strengths:	Cooperatives are strongly linked with their territories of origin and, consequently, with farmers;
Weaknesses:	(in our Country) they still have a small size, and consequently they have difficulties in accessing international market;
Opportunities:	valorisation of high quality, typical and local products
Threats:	not very efficient or competitive

Functions and stakes of the agricultural Cooperatives:

What are currently the main functions/activities (economic, social, cultural, environmental, food safety, rural development ...) of agricultural Cooperatives in your Country?

In order: 1. Economic and food safety functions; 2. Rural development; 3. All the others functions

What developments, in these, do you anticipate for the up-coming years?

Strengthening current functions through integrations and aggregations

Legislation:

In the opinion of your organisation, what are the fundamental specificities that agricultural Cooperatives must highlight vis-à-vis other types of companies?

They should highlight that the objective of a cooperative is to valorise farmers products and to provide them with services at a competitive price, and not just to make profit as other companies;

Is national legislation an obstacle to the activities of your organisation?

It could take better into account cooperative specificities, but it is not an obstacle;

Did any changes in national cooperative law occur in your Country in recent years (e.g. since 2003)? If so please specify.

In the year 2003 there was a reform of the Company Law, which concerned cooperative companies too;

Is your national taxation system adapted to the specificities of agricultural Cooperatives? Yes

Does it constitute an obstacle to some of your activities? No

Is competition law at national and/or European level is an obstacle to some of your activities? If so please specify.

No

Financing:

What are, in the opinion of your organisation, the current main obstacles/difficulties in access to finance by agricultural Cooperatives?

The main difficulty is the guarantees issuance.

Do Cooperatives need access to specific financing systems?

Yes (in part it already exists);

Do financing institutions (e.g. banks, rating agencies) have sufficient knowledge of the cooperative specificities?

Not enough

Training:

Is it necessary to set up a promotion programme for Cooperatives (national, European)? Yes.

What training systems are available, in your Country, to farmers in terms of management of/ participation in Cooperatives?

In Italy there is a specific fund called Fon.Coop, set up by Cooperatives associations and by trade unions, aimed at a continuous training for cooperatives workers;

Are some of them run by your organisation? If so please specify.

Our organization is one of the founders of ConFCoop

Development/future of policies:

What impact could the evolution of the CAP (horizon post 2013) have on Cooperatives?

It depends on how it is going to evolve. In case of a strong fund reduction, it could lead the smallest companies out of business, and the smallest cooperatives companies as well. On the contrary, a fund shift to Rural Development could be positive for cooperatives efficiency and management, and from an environmental point of view as well.

In the context of the agricultural negotiations in WTO what risks and opportunities will impact upon agricultural Cooperatives?

Trade liberalization on one hand is a threat for cooperatives, because of increased competition with countries with lower production costs, on the other hand, it could be an opportunity for reaching new markets.

What should be the positioning/involvement of agricultural Cooperatives vis-à-vis rural development policy and regional policy?

Cooperatives are a fundamental tool in supporting both rural development and regional policy, also through acknowledgement of producers organizations role.

Conclusion: the future:

Which are the main messages that Cogeca should relay to the representatives of the Commission, the Council and the European Parliament?

Cogeca should highlight agriculture's and cooperative's fundamental role in promoting food security and in landscape preservation.

Italy AGCI / AGICA

ITALIAN GENERAL ASSOCIATION OF AGRICULTURAL COOPERATIVES
AGRO, FOOD, FISHERIES SECTOR
ASSOCIAZIONE GENERALE COOPERATIVE ITALIANA
SETTORE AGRO ITTICO ALIMENTARE
(AGCI AGRITAL)

AGCI AGRITAL
Associazione Generale Cooperative Italiane
SETTORE AGRO ITTICO ALIMENTARE

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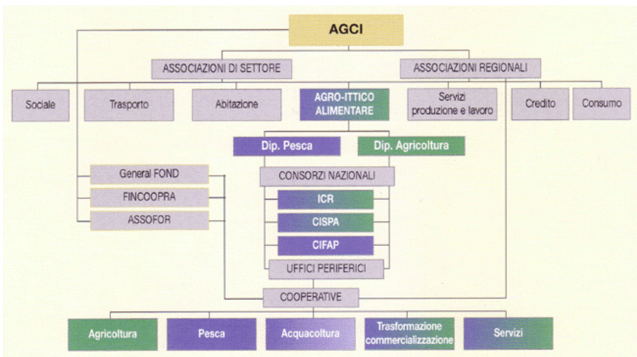
Director-General:	Raffaella DE ROSA
Contact person	Mauro VAGNI Tel. +390658328361 Fax. +390658328360 E-mail: mauro.vagni@agciagrital.coop



PANAGROTIKOS Cyprus

PANAGROTIKOS FARMERS' UNION
ΠΑΝΑΓΡΟΤΙΚΟΣ ΣΥΝΔΕΣΜΟΣ ΚΥΠΡΟΥ
PANAGROTIKOS SYNDESMOS KYPROU

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President:	Koullis PAPACHRISTOFOROU
Secretary-General:	Nektarios KARIOS

LLKA Latvia

LATVIAN AGRICULTURAL COOPERATIVES ASSOCIATION
LATVIJAS LAUKSAIMNIECĪBAS KOOPERATĪVU ASOCIĀCIJA (LLKA)

Address of headquarters:	Republikas square 2, Riga, LV – 1982, tel. +37167027546, +37129118615; e-mail: birojs@llka.lv, linda.bille@llka.lv
Liaison Office in Brussels:	
President:	Indulis JANSONS
Secretaire-General/Director General:	Linda BILLE
Person in charge of European Affairs:	Linda BILLE
Description of the structure of the organisation (organisational chart of the decision-making process):	The highest decision making body of LACA is the General assembly. Executive of LACA – Direction.
HR (staff/services)	1 worker - Executive Director
Operational budget (2008)	Approximante 68 000 EUR
Sources of funding:	
Members' subscriptions (%)	
Membership fee for 2008	40
Consulting activities (%)	5
Other business activities (%)	-
State aid or other (%) :	-
National subsidies	17
Balance of account at the beginning of year	38
Amount of co-op members	63
Sectors represented (amount + percentage)	
Multi-sector;	2 (3.2 %)
Livestock production (retail);	23 (36.5 %)
Crop production (retail);	23 (36.5 %)
Services ;	3 (4.7 %)
Fruits and vegetables ;	11 (17.5 %)
Honey.	1 (1.6 %)

Latvia LLKA

Description of the services to members:	• to organize training and education seminars; • providing information which are important for decision-making, as well as for daily work of cooperatives; • consulting members in all questions relevat to cooperation and agricultural in general; • representation of their interesets to national government bodies (especially – Ministry of Agriculture) and other institutions; • forming farmers and the rest public understanding about cooperation and cooperation privileges in agriculture; • cooperating with Ministry of Agriculture for planning support and legislation of cooperatives; • performing statistical analyze of cooperatives development.
Description of how information is communicated to members	Regular meetings with organization members (approximately 4 times per year), regular information in journal “Agropols”, information that is sent by e-mail, as well as personal communication with each representative if it is necessary.
Cooperation with other organisations and institutions (at regional, European. International level)	Cooperation is mainly developed with Ministry of Agriculture, as well as with other agricultural organizations (for example with Latvian Agricultural Organization Cooperation Council and Farmers Parliament).
Priorities for 2010	• to improve legislation that affect agriculture cooperatives daily work. • to help cooperatives adopt support of Rural development plan and national subsidies. • to perform active public relation activities for popularization of cooperation idea.

LIETUVOS ŪKININKŲ SĄJUNGA Lithuania

LITHUANIAN FARMERS' UNION
LIETUVOS ŪKININKŲ SĄJUNGA

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President:	Jonas TALMANTAS
Co-ordinator of Foreign Affairs :	Jovita MOTIEJUNIENE

Lithuania LZUBA

LITHUANIAN ASSOCIATION OF AGRICULTURE COMPANIES
LIETUVOS ŽEMĖS ŪKIO BENDROVIŲ ASOCIACIJA (LZUBA)

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President:	Jeronimas KRAUJELIS
Director-General:	Jonas SVIDERSKIS

CARL Lithuania

CHAMBER OF AGRICULTURE OF THE REPUBLIC OF LITHUANIA (CARL)
LIETUVOS RESPUBLIKOS ŽEMĖS ŪKIO RŪMAI

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President (at interim):	Bronius MARKAUSKAS
Director:	Remigijus URBONAS
Responsible European Affairs:	Ruta BICIUVIENE Tel: +370.37.409572 E-mail: ruta@zur.lt

LUXEMBURG FARMERS UNION
CENTRALE PAYSANNE LUXEMBOURGEOISE

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President:	Marc FISCH
Director:	Claude STEINMETZ

MAGOSZ Hungary

NATIONAL ASSOCIATION OF HUNGARIAN FARMER'S SOCIETIES AND COOPERATIVES
MAGYAR GAZDAKÖRÖK ÉS GAZDASZÖVETKEZETEK ORSZÁGOS SZÖVETSÉGE (MAGOSZ)

Established: 1-6-1991

Address of headquarters:	32, Nador street 1051 BUDAPEST HUNGARY Tel: + 36 1 269 12 43 Fax: + 36 1 269 1243 E-mail: zsil@axelero.hu
President:	Istvan JAKAB

KOPERATTIVI MALTA

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President:	Rosette THAKE
Vice-President:	Paul CHETCUTI
Secretary General:	Rolan Micallef ATTARD

NCR The Netherlands

NATIONAL COOPERATIVE COUNCIL FOR AGRICULTURE AND HORTICULTURE
NCR, NATIONALE COÖPERATIEVE RAAD VOOR LAND- EN TUINBOUW

Since 28 February 1934

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President:	Jos VAN CAMPEN
Secretary General:	Ruud GALLE
Description of the structure of the organisation (organisational chart of the decision-making process):	NCR has 51 members; Dutch cooperatives in agribusiness, hortibusiness, mutual insurance and the financial sector as well as the three regional farmers' organisations. The Board of NCR has seven members: presidents and CEOs of members of NCR. All member organisations appoint one representative in the general meeting.
HR (staff/services):	4 persons.
Sources of funding (%):	
Members' subscriptions	95 %
Consulting activities	5 %
Other business activities	
State aid or other	
Number of co-op members	51

The Netherlands NCR

Sectors represented (number + %): Multi-sector; Livestock production (retail); Crop production (retail); Services. *Livestock includes meat, dairy, breeding and the cooperative that processes the manure of its chicken farmers.	Members of NCR have activities in agriculture, horticulture and the financial sector. Multi-sector 5 Livestock * 9 Crop production 16 Services 21
Description of the services to members:	NCR mainly is a cooperative expertise center. The mission is gathering knowledge and to communicate this to the member organisations. NCR also is a platform, a meeting place for (supervisory) board members, management and staff members of Cooperatives. Other activities are representation of the interests of the members and contributing to policy making in agriculture and horticulture.
Description of how information is communicated to members (included information provided by Cogeca):	Meetings, seminars, education, quarterly magazine, digital newsletter, intranet and consulting activities (one on one contacts).
Cooperation with other organisations and institutions (at regional, European. International level):	NCR mainly has a.o. national contacts with its members, other Dutch cooperatives, sectoral organisations, commodity boards, universities, politics and research institutes. Internationally apart from Cogeca there are no regular contacts with organisations, more on a ad hoc basis.
Priorities for 2010:	Antritrust legislation, member loyalty, corporate governance, education and selection of (supervisory) board members, image of the cooperative, sustainability. Strategic development of agribusiness, and contributing to relevant national and European policy issues

ORV Austria

AUSTRIAN RAIFFEISEN ASSOCIATION
ÖSTERREICHISCHER RAIFFEISENVERBAND (ORV)

Österreichischer Raiffeisenverband

(1886)

Address of headquarters:	F.-W.-Raiffeisen-Platz 1 1020 Vienna AUSTRIA Tel.: +43 1 211 36 25 50 Fax: +43 1 211 36 2559, E-mail: ferdinand.maier@raiffeisen.at web-site: www.raiffeisenverband.at
Liaison Office in Brussels:	Raiffeisen EU-Büro, rue du Commerce, 20-22 Be-1000 BRUSSELS, Tel.: +32 2 54 90 678, Fax: +32 2 50 26 407, e-mail: raiffbxl@raiffeisenbrussels.be
President:	Dr. Christian KONRAD
Vice(s)-President(s):	Jakob AUER, Sebastian SCHÖNBUCHNER
Secretary-General:	Dr. Ferdinand MAIER
Responsible European Affairs:	Johann KÖLTRINGER
Description of the structure of the organisation	- general assembly - “generalanwaltschaft”/ President - board
HR (staff/services):	Elisabeth SCHALKO
Sectors represented (number + %):	banking, warehouses, dairy, crops, sugar, milk, others
Description of the services to members:	information
Description of how information is communicated to members (included information provided by Cogeca):	direct info, regular news, meetings, task forces
Cooperation with other organisations and institutions (at regional, European. International level)	IRU, Cogeca, EDA

KZRKIOR **Poland**

NATIONAL UNION OF FARMERS' CIRCLES AND AGRICULTURAL ORGANISATIONS
KRAJOWY ZWIĄZEK ROLNIKÓW, KÓLEK I ORGANIZACJI ROLNICZYCH (KZRKIOR)

Address of headquarters:	2/4 Szkolna St. 00 006 WARSAW POLAND Tel: +48 22 8265 555 Fax: +48 22 827 3001 e-mail: europa@kolkarolnicze.pl; biuro@kolkarolnicze.pl web-site: www.kolkarolnicze.pl
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President:	Wladyslaw ŁADYSŁAW SERAFIN
Vice-President(s):	Stanislaw MARCINKIEWICZ, Jósef PAWLAK, Miroslaw SUROWIEC, Boguslaw WŁODARCZYK, Wojciech ZARZYCKI
Secretary-General:	Irena FRASZCZAK
Responsible European Affairs:	Marcin SAWICKI (Warsaw) Maria ZUBER (Brussels)

CONFAGRI Portugal

PORTUGUESE CONFEDERATION OF AGRICULTURAL COOPERATIVES AND AGRICULTURAL CREDIT
CONFEDERACÃO NACIONAL DAS COOPERATIVAS AGRÍCOLAS E DO CRÉDITO AGRÍCOLA DE PORTUGAL

(Established : 1985/10/03)

Headquarters:	Rua Maria Andrade, 13 1199-013 LISBOA PORTUGAL Tel.: +351 21 811 80 00/08; E-mail: confagri@confagri.pt; web-site:: www.confagri.pt
Liaison office in Brussels:	61, rue de Trèves r/ch BE-1040 BRUXELLES Tel.: +32 2 280 38 00 Fax: +32 2 280 68 00 e-mail: confagri@skynet.be
President:	Fernando da SILVA MENDONÇA.
Secretary General:	Francisco SILVA.

F.N.P.A.R. Romania

NATIONAL FEDERATION OF THE AGRICULTURAL PRODUCERS OF ROMANIA

Federatia Nationala a Producatoriilor Agricoli din Romania

Address of headquarters:	STR. HRISTO BOTEV NR. 1, CAM. 9, ET. 1 Sector 3 BUCHAREST Romania Tel/Fax +40314253519 E-mail: nfpar2007@yahoo.com
President:	Viorel MATEI
Director:	Daniel Dumitru BOTANOIU

ZPD a OS SR Slovakia

ASSOCIATION OF AGRICULTURAL COOPERATIVES AND COMPANIES
ZVÄZ POĽNOHOSPODÁRSKYCH DRUŽSTIEV
A OBCHODNÝCH SPOLOČNOSTÍ SR

Established in 1968

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President:	Milan MIŠÁNIK
Responsible European Affairs:	Adriana VERESPEJOVA

Slovakia ZPD a OS SR

ASSOCIATION OF AGRI-ENTREPRENEURS OF SLOVAKIA (ZAS)

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President:	Oliver ŠIATKOVSKÝ
Director:	Martin CALEK

KGZS Slovenia

CHAMBER FOR AGRICULTURE AND

FORESTRY OF SLOVENIA

KMETIJSKO GOZDARSKA ZBORNICA SLOVENIJE (KGZS)

Kmetijsko gozdarska zbornica Slovenije
Chamber of Agriculture and Forestry of Slovenia

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E-mail: sasa.hocevar@kgzs.si, kgsi@kgsi.si
Web-site: www.kgzs.si

President: Ciril SMRKOLJ

Director: Igor HROVATIČ

Slovenia ZZS

COOPERATIVE UNION OF SLOVENIA (ZZS)
ZADRUŽNA ZVEZA SLOVENIJE, Z.O. O.
SLOVENIJA
1972

Address of headquarters:	Miklošičeva 4, 1000 Ljubljana, SLOVENIA Tel.: +386 (0)1 24 41 360 Fax: +386 (0)1 24 41 370 E-mail: info@zzs.si Web-site: www.zzs.si
Liaison office in Brussels:	----
President:	Peter VRISK
Secretary-General:	Bogdan ŠTEPEC
Responsible European Affairs:	Katarina KOZINC HUSKIČ, Anita JAKUŠ, Bojana JERINA, Primož ŽERJAV, Matjaž PODMILJŠAK
Description of the structure of the organisation (organisational chart of the decision-making process):	The highest managing body of the Cooperative Union is its general meeting, consisting of the representatives of all members. The general meeting elects the Managing Board, in which cooperatives from all Slovenian regions are represented, and a Supervisory Board, consisting of 5 members. The Managing Board is chaired by the President who is also the president of the Cooperative Union of Slovenia. The day-to-day business is managed by the General Manager (Chief Executive Officer). He/she is appointed by the Managing Board and organizes the work of the staff.
HR (staff/services)	16
Operational budget (2009)	1,4 million €
Sources of funding:	
Members' subscriptions (%)	9 %
Consulting activities (%)	7 %
Other business activities (%)	84 %
State aid or other (%)	-
Amount of co-op members	16.539 (2008)
Sectors represented (amount + percentage)	75%- 100% multi-sector

ZZS Slovenia

Description of the services to members:	Consultancy services, Representation, Education and training, Information services, Promotion and public relations, International cooperation, Development of the cooperative movement
Description of how information is communicated to members (included information provided by Cogeca):	We are publishing our own bulletin for our members, publication of a variety of periodicals, website.
Cooperation with other organisations and institutions (at regional, European. International level)	Slovenian Chamber for Agriculture and Forestry, Agricultural Faculties, Agricultural Institute of Slovenia, Ministry of agricultural, forestry and food, other non governmental organisation, Copa/Cogeca, ICA
Priorities for 2010	Strengthening the position of cooperatives, gaining shares in the food processing industry, stimulating cooperation between cooperatives etc.

Slovenia ZZS

Main Issues and Trends For Cooperatives in Slovenia

Agricultural Cooperatives:

Strengths:
- Tradition of Cooperatives in Slovenia (137 years)
- agricultural and forestry cooperatives in Slovenia cover all national territory
- concentration of production
- cooperative is the most important marketing tool for farmers
- practically every single farmer co-operates with at least one agricultural or forestry cooperative
- social role on the rural area and national economy
- to preserve settlement of rural areas
- promotion and selling of national agricultural products
- simple procedure for establishing the cooperative (a cooperative may be established by at least three founders who are natural persons or legal entities, without any prescribed financial capital)
- cooperatives represent economic interest of farmers
- voluntary and open membership

Weaknesses:
- orientation on the local and Slovenian market
- the Cooperatives don't have their own trademark
- high dependency of Cooperatives on the agricultural policy
- lower competitive position of cooperatives vis-a-vis other private companies
- age structure and education level in agricultural sector is disadvantage
- lax relations between cooperative members and cooperatives
- heterogeneous interests of members
- weak of corporate governance
- decision making process is complicated
- inefficient market strategies

Opportunities:
- common European market
- developing new common agricultural policy
- European Cooperative Society
- diversification of activities of the cooperatives (niche markets: tourism, processing, bio production, bio fuels….)
- cooperatives as equal partner in food chain
- ownership of the food processing companies
- cooperatives as a provider of public goods
- food security
- vertical integration and branding by cooperative business development
- EU support for cooperative business development
- support for cooperative movement in domestic country
- Consumer orientated policy
- synergistic effect of cooperation among cooperatives
- concern for community
- good cooperation between agricultural organisation

Threats:

- lack of support cooperative movement from the national government
- abandonment of farming and agricultural production
- changing of common agricultural policy (abolition of milk quota &reference quantities, the single area payment..)
- strong competition on retail market, dominant position of supermarkets and small national market
- seasonal influences
- lack of capital for investments
- evolution of food consumption, changing behaviour of consumer
- traditional cooperative governance
- unconsidered value of cooperative movement
- cooperative auditing is not regulated in cooperative Act

Functions and stakes of the agricultural Cooperatives:

What are currently the main functions/activities (economic, social, cultural, environmental, food safety, rural development ...) of agricultural Cooperatives in your Country?

The main activities of Cooperatives in Slovenia involve supplying farmers with raw materials and marketing farm and forestry products. They help supply farms and the rural population, especially in remote areas. In the field of marketing, the most important products are milk, cattle, pigs, grapes, potato, cereals, vegetables, wood, hops and other product. Cooperatives play a key role in selling plant protection agents, seeds, mineral fertilisers and fodder. Most Cooperatives run outlets that help to stock rural populations thereby helping to keep rural areas vibrant. They support also agriculture and forestry with its non-productive functions in less favoured areas. The main functions of positive contribution of cooperatives could be characterised as enabling the economically weaker farmers to retain their economic independence, while benefiting from the economies of scale.

What developments, in these, do you anticipate for the up-coming years?

We are anticipating that in the up-coming years the Cooperatives will have larger role in promotion and production of healthy food, protecting the environment and keeping the rural areas vibrant.

- to exploit potentials of Cooperatives in national economy,
- to develop business chances, opportunities including entrepreneurship and management skills,
- to strengthen competitive position of Cooperatives and to lower the costs,
- to assure suitable incentives for entrepreneurial funding of Cooperatives,
- to access the world market and financial institutions,
- Equally treating of Cooperatives in national low as commercial companies,
- Support measures for Cooperatives because Cooperatives perform universally recognised set of values and principles through laws and statutes that recognise them as distinct forms of enterprise,
- Instalment of Cooperatives as efficient means for enlargement of economy power of small and medium businesses and their mutual co-operation,
- Cooperatives as businesses in the ownership of its members assure better quality of services and they perform service which are not interesting for exclusively profit oriented businesses,
- Cooperatives are important co-shaper of society of knowledge-based society and are school of entrepreneurship for those, which otherwise couldn't take these responsibilities,
- Strengthening of business and capital integration of Cooperatives in regard of globalisation,
- Integrity governing the food chain and all the entities inside of food chain
- Active role in shaping the CAP,
- Larger meaning of local self-sustainability and role of special agricultural products,
- Cooperatives as socially responsible business,
- Cooperatives as co-shaper of rural development and environmental care,

Slovenia ZZS

Care for sustainable development,
Assurance of standards for environmental friendly farming,
Strengthen of international and community co-operation,
Corporate governance in cooperatives.

Legislation

In the opinion of your organisation, what are the fundamental specificities that agricultural Cooperatives must highlight vis-à-vis other types of companies?

The cooperatives are regulated by a special Act (Act on Cooperatives, 1992).

The Act on Cooperatives defines the cooperative as an »an organization associating an initially undetermined number of members with the purpose of enhancing the economic interests of its members and based on voluntary entry, free withdrawal and the equal rights of members to participate in the operation and management of the cooperative«. The cooperative carries out its business by entering into contracts prevailingly with its members. The definition was amended in 2009, and now allows cooperatives to develop also economic or social activities of its members, similarly as it is stated in the Regulation on the Statute of the SCE.

A cooperative may be established by at least three founders who are natural persons or legal entities. After the foundation, the cooperative may admit new members. Each cooperative shall have a General Assembly as the highest governing body, a management and supervisory organ. The obligatory management organ is a President of the cooperative. The supervisory organ can be a Supervisory Board or at least one Auditor.

Each member of a cooperative is obliged to subscribe at least one share. A cooperative shall be obliged to allocate at least 5 % of its annual profits to the compulsory reserves. The cooperative can form also other funds and specify their purpose (voluntary funds), if so determined by the Rules of the cooperative or decided by the General Assembly.

The main objective of a cooperative is to promote the economic interests of its members, while the main objective of a company is maximising its value.

Due to non-transferability of shares, the cooperative is not submitted to the control exercised by the capital market.

Non-existence of minimum capital or its variable amount as well as allowed exclusion of personal liability of members.

Is national legislation an obstacle to the activities of your organisation?

There are some difficulties in obtaining state aid, some schemes exclude cooperatives as potential beneficiaries. Cooperatives should enjoy equal access to state aids schemes as commercial companies.

In 2009 a further amendment introduced the European cooperative society in the Slovenian legislation. On the other hand, provisions for the cooperative auditing, aimed at protecting members' financial interests and preserving of that part of the cooperative assets which can not be divided among members after the winding up of the cooperative, were removed from the Law on Cooperatives and are now partly set out in the Act on Commercial Companies.

ZZS Slovenia

Did any changes in national cooperative law occur in your Country in recent years (e.g. since 2003)? If so please specify.

Since the year 2007 the Act on Cooperatives was amended. The recently adopted amendments provide some additional measures in order to improve the marketing position of cooperatives which, in principle, should not be worse than that of other economical subjects. The second aim of the Act is to protect and further develop some distinctive features of cooperatives as well. The Act contains detailed provisions about the corporate restructuring of cooperatives, including mergers, divisions and transformation of legal form. In addition, the cooperatives should enjoy equal access to state aids schemes as commercial companies. They could carry out any business to the benefit of their members under the same conditions as are required for commercial companies. More detailed provisions are foreseen for the cooperative auditing. These provisions aim at protecting of members' financial interests and preserving of that part of the cooperative assets which can not be divided among members after the winding up of the cooperative.

In 2009 a further amendment introduced the European cooperative society in the Slovenian legislation. On the other hand, provisions for the cooperative auditing, aimed at protecting members' financial interests and preserving of that part of the cooperative assets which can not be divided among members after the winding up of the cooperative, were removed from the Law on Cooperatives and are now partly set out in the Act on Commercial Companies.

Is your national taxation system adapted to the specificities of agricultural Cooperatives? Does it constitute an obstacle to some of your activities?

Our national taxation system isn’t adapted to the specificities of agricultural cooperatives and it is an obstacle to some of or activities. The cooperatives in Slovenian taxation system are treated equally as private companies.

Regarding your national taxation system please indicate the areas that should be reviewed/changed.

Because of less favourable position of cooperatives in national taxation system cooperatives could be interested to change their legal form to other types of companies. Cooperatives are based on the values of self-help, self-responsibility, democracy, equality, equity and solidarity. In the tradition of their founders, cooperative members believe in the ethical values of honesty, openness, social responsibility and caring for others and they should get special benefits in our national system.

Is competition law at national and/or European level is an obstacle to some of your activities? If so please specify.

Competition law at national and European level is not until now an obstacle for our activities. The special nature of cooperative should be taken into account also in the competition legislation that cooperatives could perform their mission efficiently.

Slovenia ZZS

Financing:

What are, in the opinion of your organisation, the current main obstacles/difficulties in access to finance by agricultural Cooperatives?

In the past the Government provided a special support scheme for restructuring of agricultural cooperatives with capital grants and special loans. The cooperatives don't have any special financial support and they have to look for the support in National program of rural development 2007 – 2013 and other public European tenders.

Do Cooperatives need access to specific financing systems?

Cooperatives were owners of more than 60 saving and loan services and they gave favourable credits to cooperatives. This saving and loan services were members of Union of saving and loan services of Slovenia. In 2004 the Union transferred its property to Cooperative Bank, which is now days cold Deželna banka Slovenije. Cooperatives are today the main owner of Deželna banka Slovenije as a basic financial institution for farmers and cooperatives in Slovenia.

Do financing institutions (e.g. banks, rating agencies) have sufficient knowledge of the cooperative specificities?

Financial institutions in Slovenia don't have sufficient knowledge of the cooperative specificities; cooperatives are equally treated as private companies. The support of the cooperatives and farmers is provided mostly by Deželna banka Slovenije, where cooperatives are the main owners.

Training:

Is it necessary to set up a promotion programme for Cooperatives (national, European)?

We think that it is necessary to set up a promotion programme for Cooperatives at the national and European level.

What training systems are available, in your Country, to farmers in terms of management of/participation in Cooperatives?

There are no special co-op training institutes, but the Cooperative Union organizes training courses for members and employees of the cooperatives.

Are some of them run by your organisation? If so please specify.

Cooperative Union organizes training courses for members and employees of the cooperatives. Every year we are organizing regional seminars for supervisory and managing board, management, and employee and for the members of the cooperatives about actual topics for their business and legislation. We also organize specific seminars under Cooperative academy. As for the future, the Cooperative Union of Slovenia is interested in exchange of best business practices and successful measures of cooperative policy in the accession countries and the present member countries of the EU. A special topic of this cooperation could represent also the implementing measures for the European cooperative society.

ZZS Slovenia

Development future of policies:

What impact could the evolution of the CAP (horizon post 2013) have on Cooperatives?

- development of European Cooperative Society
- diversification of activities of the cooperatives (niche markets: tourism, processing, bio production, bio fuels....)
- cooperatives as a public service
- food security
- vertical integration and branding by cooperative business development
- Consumer orientation policy
- concern for community
- If taxation system for cooperative are treated equally as other private companies will cooperative change its organisational to other business form
- Weakening of financial position of cooperatives due to substantial reduction of measures in market policy.

In the context of the agricultural negotiations in WTO what risks and opportunities will impact upon agricultural Cooperatives?

Agricultural negotiations in WTO are opening the world market and give less support to the European farmers. WTO negotiations have impact on food production in Europe. European farmers and food processing industry can not compete with world farmers and world food industry. On the European market also GMO products and environmental not friendly technologies will emerge. European Agribusiness is becoming a global player. We can also expect allocation of production sources and problem with European self-supply.

What should be the positioning/involvement of agricultural Cooperatives vis-à-vis rural development policy and regional policy?

In the up-coming years, the Cooperatives will have larger role in promotion and production of healthy food, protecting the environment and keeping the rural areas vibrant. Cooperative should have a larger role in rural development policies and regional policy.

Conclusion: the future:

Which are the main messages that Cogeca should relay to the representatives of the Commission, the Council and the European Parliament?

- support cooperative business development
- accept cooperative friendly tax legislation
- promote cooperative movement and tradition
- ensure improvements in cooperative legislation in member states
- dialogue with Governments on legal and policy frameworks for Cooperatives that are consistent with cooperative values and principles
- recognition by Governments and civil society of the potential of Cooperatives as specific enterprise models, in a 21st century economy – taking co-operation into new areas of economic and social activity
- the need to safeguard and preserve the unique characteristics of Cooperatives as democratic member owned and controlled enterprises driven by a universally recognised set of values and principles through laws and statutes that recognise them as distinct forms of enterprise
- to ensure effective dialogue with Governments and policy makers
- to enable a wider public and young people in particular to learn the success, scale and potentials of the cooperative model and its contribution to social as well as economic capital
- to make changes to the legislative framework to ensure that it provides a sound basis for the development and growth of cooperative enterprises

PELLERVO Finland

CONFEDERATION OF FINNISH COOPERATIVES
PELLERVO

2 October 1899

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President:	Martti ASUNTA
Vice-President & Responsible European Affairs:	Tiina LINNAINMAA
Managing Director:	Veikko HÄMÄLÄINEN
Person in charge of European Affairs:	Marjukka Manninen (Per-Erik Lindström)
Description of the structure of the organisation (organisational chart of the decision-making process):	ANNUAL MEETING ↓ DELEGATION (25) ↓ BOARD OF DIRECTORS (9)

Finland PELLERVO

HR (staff/services):	18
Operational budget (2009):	4,4 million €
Sources of funding (%):	
Members' subscriptions	4 %
Consulting activities	2 %
Other business activities	94% (magazines and assets)
State aid or other	0 %
Number of co-op members:	328
Sectors represented (number +):	
Multipurpose;	
Livestock production (retail);	31 (9 %)
Crop production (retail);	0
Services	278 (85%)
Other	19 (6%)
Description of the services to members:	Publications, seminars, legal advice
Description of how information is communicated to members (included information provided by Cogeca):	Magazines , Newsletter to members Brussel's letter
Cooperation with other organisations and institutions (at regional, European. International level):	ICA & Cooperatives Europe, IFAP, Nordic Farmers Organisation (NBC)
Priorities for 2010:	1. Promote and develop competitive operational preconditions for cooperatives (lobbying) 2. Improve the professional and intellectual skills of the administrators in cooperatives (training, publications) 3. Promote and develop the cooperative idea and the strategic advantages of user-owned enterprises and encourage the foundation of new cooperatives in all sectors of economy (advice to small new cooperatives)

PELLERVO **Finland**

Main Issues and Trends for Cooperatives in Finland

I. Legislation:

In your opinion, what are the fundamental specificities that farming Cooperatives must highlight vis-à-vis other types of company?

Agricultural Cooperatives, in general, must consider the benefit of their members. We see this as an advantage to the farmers and it gives them a stronger position. Other types of companies (=limited) act for the benefit of their owners.

Comments/evolution of national cooperative law in the last five years. Is your national legislation an obstacle to some of your activities?

Finland got a new cooperative act in 2002. The act is still a frame-work. The new act, however, gave the Cooperatives even more possibilities to arrange things after the members will than before. As we see it there are no obstacles in the Finnish legislation.

Is national taxation adapted and specific to the type of farming cooperative company? Is it an obstacle to some of your activities?

As for today there are no differences, or obstacles, in the taxation of agricultural Cooperatives compared to other forms of companies. However, suggested changes in our taxation laws might lead to double taxation of e.g. dividends in larger companies (=abolition of the so called "fiscal-avoid" system). There is a discussion now, whether this should also apply to the return of interest (over EUR 100 per member) on the cooperative capital in Cooperatives. This would be a great obstacle for our agricultural Cooperatives compared with the situation today. It would possibly lead to a conversion to limited companies of Cooperatives with a large share-capital per member (mainly agricultural Cooperatives).

Comments/ evolution of competition law at national and European level? Is it an obstacle to some of your activities?

A modernized national competition law, that harmonized it with the European level, was adopted this year. In Finland we see the national authorities' interpretation of e.g. relevant markets as a problem.

II. Concentration and the market:

Have you noticed a trend towards concentration in the last five years? Regional, national, European (projected ECS or other types of collaboration)?

Yes, there is an ongoing concentration both nationally and in Europe. On the agricultural side we see this as necessary parallel to the international development. Agricultural Cooperatives must grow larger to be able to compete with the multinationals.

Finland PELLERVO

Which relations do Cooperatives have with the retail trade (multiples)? Are they themselves active in this area?

Wholesale business is continuously concentrating, while retail trade is more and more formed into chains. This is also a reason for the agricultural Cooperatives to achieve critical mass by concentrating. Consumer's Cooperatives are one of the two large actors in wholesale in Finland. Finnish agricultural Cooperatives (the big groups) are very strong on the logistic side giving them a strong position towards the wholesale business.

III. Functions and stakes of the agricultural Cooperatives:

What are/will be the main functions of Cooperatives in your Member State (economic, social, cultural, environmental, food safety, rural development ...)?

The agricultural Cooperatives play an important role in all of these areas. An intact food-chain from "stable to table", controlled by farmers and their Cooperatives is the best guarantee for food safety and an environmentally sound agriculture. These are main consumer demands. In Finland agriculture and related businesses are the key players in preserving the rural society.

IV. Financing:

Is the access to finance sufficient and satisfactory for agricultural Cooperatives? Do Cooperatives need access to specific financing systems?

Financing is not a major problem for agricultural Cooperatives in Finland.

Do financing institutions have sufficient knowledge of the cooperative specificities? (e.g.: rating agencies)

This is a problem above all for the small new wave Cooperatives. Banks generally rely more on small businesses with other company forms.

V. Training:

Is it necessary to set up a promotion programme for Cooperatives (national, European)?

Training is essential for Cooperatives. Funds should be given especially for training of management within the new wave Cooperatives. More funds should also be given for different advisory services to new Cooperatives.

What training systems are available to farmers in terms of management of/participation in Cooperatives?

In Finland Pellervo (Cooperatives) and MTK (producers) have training of cooperative management as a joint venture.

PELLERVO **Finland**

VI. CAP, rural development and WTO:

What impact could the reform of the CAP (2003) have on Cooperatives?

CAP influences the farmer level, not the cooperative level directly. It is however a fact that there are no agricultural Cooperatives without sufficient agriculture. A decrease in supply, might lead to quality problems for our food industry.
In all political reforms the maintenance of farming in all EU-regions should be safeguarded. CAP (2003) was a setback on this point.

What position should agricultural Cooperatives take with regard to the agricultural negotiations in WTO?

Agricultural Cooperatives and Copa-Cogeca should defend European agriculture and local production and local processing all over our planet. A strong liberalisation of agricultural trade is negative for European agriculture, as well as for agriculture and rural life in developing countries.

Do agricultural Cooperatives already sufficiently benefit from rural development and the structural funds?

In Finland agricultural Cooperatives benefit very little directly from these funds.

VII. Conclusion: the future:

Which main assets and weaknesses of Cooperatives should be instilled to the representatives of the Commission, the Council and the European Parliament?

An intact food-chain with Cooperatives as the backbone is the best model to achieve a transparent chain from “stable to table”. It gives the best possibilities for public insight and “political” control as well. Therefore, it should be politically supported at all levels.

LRF Sweden

FEDERATION OF SWEDISH FARMERS
LANDBRUKARNAS RIKSFÖRBUND (LRF)

LANTBRUKARNAS RIKSFÖRBUND

Established 01-01-1971

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Sweden LRF

Main Issues and Trends for Cooperatives in Sweden

I. Legislation:

In your opinion, what are the fundamental specificities that farming Cooperatives must highlight vis-à-vis other types of company?

The fundamental specificities are based on the cooperative principles that a cooperative is an autonomous association of persons united voluntarily to meet their common economic need through a jointly-owned and democratically controlled enterprise. The cooperative enables the farmers to bring their products to the market instead of being mere suppliers to the food industry. The dual role of owners and suppliers to the cooperative gives the members both opportunity and responsibility.

Comments/evolution of national cooperative law in the last five years. Is your national legislation an obstacle to some of your activities?

No, not in a significant way.

Is national taxation adapted and specific to the type of farming cooperative company? Is it an obstacle to some of your activities?

There is no special tax law for "farming-Cooperatives". All Cooperatives are taxed in the same way as other companies, however, Cooperatives may deduct from their result dividends, deferred payments etc. distributed to their members. The national taxation is not any significant obstacle.

Comments/evolution of competition law at national and European level? Is it an obstacle to some of your activities?

No, not in a significant way.

II. Concentration and the market:

Have you noticed a trend towards concentration in the last five years? Regional, national, European (projected ECS or other types of collaboration)?

Yes, if you refer to mergers between Cooperatives. In the last five years a number of Cooperatives have merged but the pace has slowed down

Which relations do Cooperatives have with the retail trade (multiples)? Are they themselves active in this area?

The retail trade are important customers to the Cooperatives. The Cooperatives are not direct competitors with the retail trade.

LRF Sweden

III. Functions and stakes of the agricultural Cooperatives:

What are/will be the main functions of Cooperatives in your Member State (economic, social, cultural, environmental, food safety, rural development …)?

The function is mainly economic but the Cooperatives, as a part of their business, are involved in questions regarding environment and food safety.

IV. Financing:

Is the access to finance sufficient and satisfactory for agricultural Cooperatives? Do Cooperatives need access to specific financing systems?

Yes, in general the access to financing is satisfactory. The Swedish Cooperatives have high solidity and strong balance sheets which make it possible to get financing from banks on normal to good conditions. Swedish Cooperatives can also, to a certain extent, issue "capital shares" both to members and non-members. The capital shares take part in the distribution profit.

Do financing institutions have sufficient knowledge of the cooperative specificities? (e.g.: rating agencies)

No.

V. Training:

Is it necessary to set up a promotion programme for Cooperatives (national, European)?

Since Ag co-op play such an important role in the processing of trading of agricultural commodities it is essential that the legislative framework is supportive to cooperative companies. Promotion programmes are important both on the national scene and on the European level.

What training systems are available to farmers in terms of management of/participation in Cooperatives?

The Federation of Swedish Farmers supply management training to farmers in their role as board members in cooperatives covering the total agricultural and forestry sector.

VI. CAP, rural development and WTO:

What impact could the reform of the CAP (2013) have on Cooperatives?

The CAP-reform and especially the decoupling of direct payments may lead to decreased production, mainly in disadvantaged regions (small and scattered fields, long distances to markets/processing facilities). Diminished production will impact on the whole chain from sales of inputs to grain elevators and abattoirs, dairies and mills. Since these activities in Sweden are dominated by Cooperatives, these will face economic stress due to decreased turnover and overcapacity. The pressure for structural change will increase, implying loss of employment and for farmers a lower service-level.

Sweden LRF

What position should agricultural Cooperatives take with regard to the agricultural negotiations in WTO?

Cooperatives have every incentive to support the positions of farmers' organisations (i.e. Copa and national farm organisations) in the WTO-negotiations in order to defend the interest of European agriculture

Do agricultural Cooperatives already sufficiently benefit from rural development and the structural funds?

No, they do not. They have faced basic problems to get access to the structural funds programmes and have few development activities funded by the rural development programme.

VII. Conclusion: the future:

Which main assets and weaknesses of Cooperatives should be instilled to the representatives of the Commission, the Council and the European Parliament?

We believe that vital and strong Cooperatives are imperative for the farmers ability to market their products and to get a fait income for their work. In this context, it is important to distinguish agricultural Cooperatives from social Cooperatives. There is otherwise a risk that agricultural Cooperatives are subject to other demands than their competitors in the food industry (e.g. when restructuring it business, closing down plants etc.)

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