



Mapping and challenges of large European agricultural cooperatives

Analysis of the financial and extra-financial performance of the 100 largest agricultural cooperatives in Europe



Study
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Mapping and challenges of the largest European agricultural cooperatives Edition 2022

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AN EXCLUSIVE REPORT THAT WILL ALLOW YOU TO :

- Assess the weight of agricultural cooperatives in the main European countries in terms of turnover and employment
- Understand the differences in cooperative statutes in the different European countries
- Map the main agricultural coops in Europe
- Have an exclusive financial analysis of the 100 largest agricultural cooperatives in Europe over the 2016-2020 period.
- Analyze the strategic ambitions of the different European agricultural cooperatives
- Evaluate the objectives and concrete achievements of the largest European cooperatives in terms of sustainable development and fight against climate change

More than **€238 billion** in cumulative turnover for the top 100 European agricultural cooperatives in 2020

Agricultural cooperatives are still relatively unknown economic actors. However, they have a significant weight in most European agricultural and agri-food sectors. They are owned by farmers and have developed over the years both upstream and downstream of the sectors, by developing processing activities and even distribution channels.

FRENCH AGRICULTURAL COOPERATIVES ARE THE MOST NUMEROUS AND THE MOST DYNAMIC IN THE EUROPEAN TOP 100 BUT ARE NOT THE MOST IMPORTANT ONES

With 31 cooperatives in the European top 100 in 2020, French agricultural cooperation is well represented and is ahead of Germany, which has 15 representatives. However, French cooperatives are not the largest: only two French cooperatives will have a turnover of more than 5 billion euros in 2020 and only one is in the European top 10. The largest European cooperative has a turnover of 17.2 billion euros, which is almost three times the turnover of the first French cooperative.

Southern countries like Italy and Spain have a few cooperatives in the top 100, but there is no Spanish cooperative in the top 50 and only 2 Italian cooperatives.

FRENCH AND GERMAN AGRICULTURAL COOPERATIVES ARE STILL LITTLE INTERNATIONALISED COMPARED TO COOPERATIVES IN NORTHERN EUROPE

Cooperatives in Northern Europe countries (Denmark, Ireland, the Netherlands) are the most internationalised: due to a saturated domestic market, they were quick to focus on exporting and setting up internationally. The Irish cooperative Glanbia achieved almost 100% of its turnover internationally in 2020. Danish Crown has made almost 90% of its turnover abroad (exports + establishments), Arla Foods and Friesland Campina around 75-80%. In contrast, French and German cooperatives, which have a larger domestic market, are naturally less export-oriented. Thus, only a handful of French and German cooperatives achieve more than 50% of their turnover internationally.

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EUROPEAN AGRICULTURAL COOPERATIVES ARE INCREASINGLY COMMUNICATING ON THEIR EFFORTS TO ACHIEVE SUSTAINABLE DEVELOPMENT

At a time when the fight against climate change has become a priority for many European citizens and agriculture is often called into question, European agricultural cooperatives are increasingly transparent about their impact on the environment. Some of them have set very ambitious targets. For example, the dairy cooperative group Arla Foods wants to reduce its total CO2 emissions by 30% per kilo of milk by 2030 and move towards net zero carbon by 2050.

SYNTHETIC SUMMARY

Synthesis

- I) **Key figures on agricultural cooperatives in Europe**
 - Key figures about agriculture in Europe
 - Key figures about agricultural cooperation in Europe
- II) **Focus on agricultural cooperation in some European countries (specificities, key figures, top 10 per country)**
 - Main legal characteristics of cooperatives by country
 - Key figures for agricultural cooperation by country
 - Ranking of the main agricultural cooperatives by country
- III) **The top 100 agricultural cooperatives in Europe**
 - Top 100 by revenue in 2020
 - Mapping of the top 100 according to country and main activity
- IV) **Financial analysis of the top 100 European agricultural cooperatives**
 - Top 100 ranking based on 2020 sales revenue
 - Evolution over 5 years of the turnover of the European top 100 cooperatives
 - Top 100 ranking in terms of operating margin
 - Top 100 ranking in terms of EBITDA margin
 - Top 100 ranking in terms of financial autonomy
 - Top 100 ranking in terms of debt ratio
 - Top 100 ranking in terms of financial leverage
 - Top 100 ranking according to the share of international sales revenue
 - Study of the different above ratios according to countries and sectors
- V) **Analysis of the extra-financial performance of European agricultural cooperatives**
 - Analysis of the UN Sustainable Development Goals put forward by European cooperatives
 - Business cases on major European agricultural cooperatives in which we analysed their respective policies on sustainable development and the fight against global warming

THE + OF THE REPORT :

- An **unprecedented financial analysis** of the 100 largest European agricultural cooperatives for the years 2016-2020
- A study completed by **interactive maps and graphs** that can be consulted online
- A **mapping** of the main European agricultural cooperatives and business cases on some key agricultural cooperatives
- A comparison of the sustainable development indicators developed by European agricultural cooperatives
- A focus on the **international strategies of European agricultural cooperatives**

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☐ I would like to order the study Strategies and challenges of the major European agricultural cooperatives 2022 edition at the price of 1,000 euros excluding tax (1,200 euros including VAT)

In addition, a presentation of the main results of the study at a general meeting or a strategy seminar is also possible (quote on request).

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