



ABOUT US

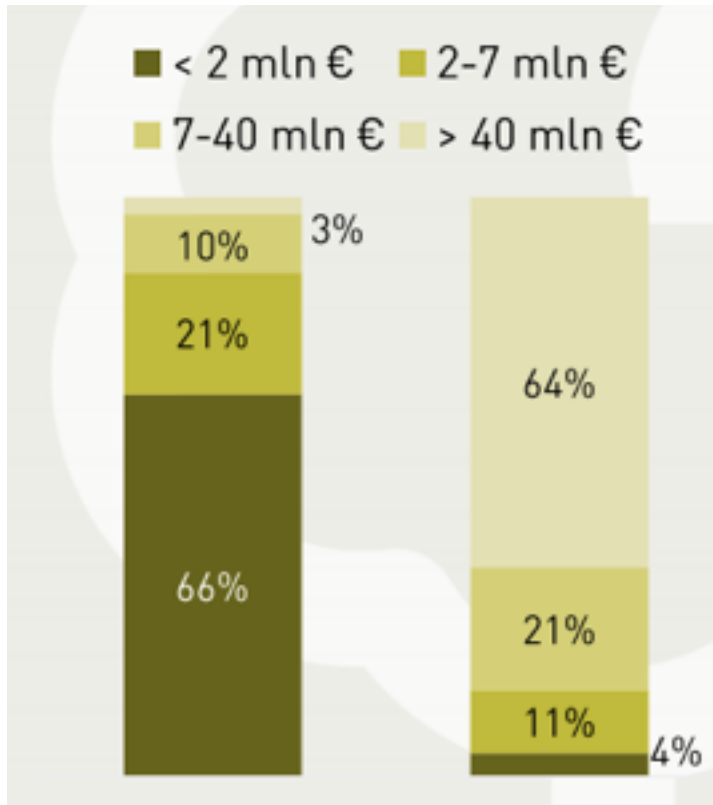
Italian Alliance of agri-food cooperatives

- more than 5.800 cooperatives,
- 800.000 members,
- 90.000 employees,
- a turnover of 34 billion €,
- 1/4 of the Italian agri-food production



ABOUT US

- 70% of the Italian turnover of PDO cheeses
- 60% of the Italian gross marketable production of wine, including most of the wines protected under GI's
- 40% of the Italian fruit and vegetable gross marketable production
- 70% of the Italian gross marketable production in the poultry and rabbit sector



Cooperatives

Turnover

The medium size and the turnover generated by cooperatives differs significantly across Italy

ORIGIN

TRADITION

TERRITORY

Our cooperatives provide 99% of their supplies locally (up to 76%) and nationally (23%). Only 1% of the raw materials are purchased outside the country.

This allows cooperatives to maintain a true connection with the area of origin, keeping a strong link with the distinctive features of the Italian food tradition

MUTUALITY

VIABILITY

**RURAL
DEVELOPMENT**

Moreover, our supplies are made in order to use and provide an added value to the products conferred by our members :

→ 76% of the agricultural products used, are hailed from our members



~~No intermediaries~~

Cooperatives play a key role in order to:

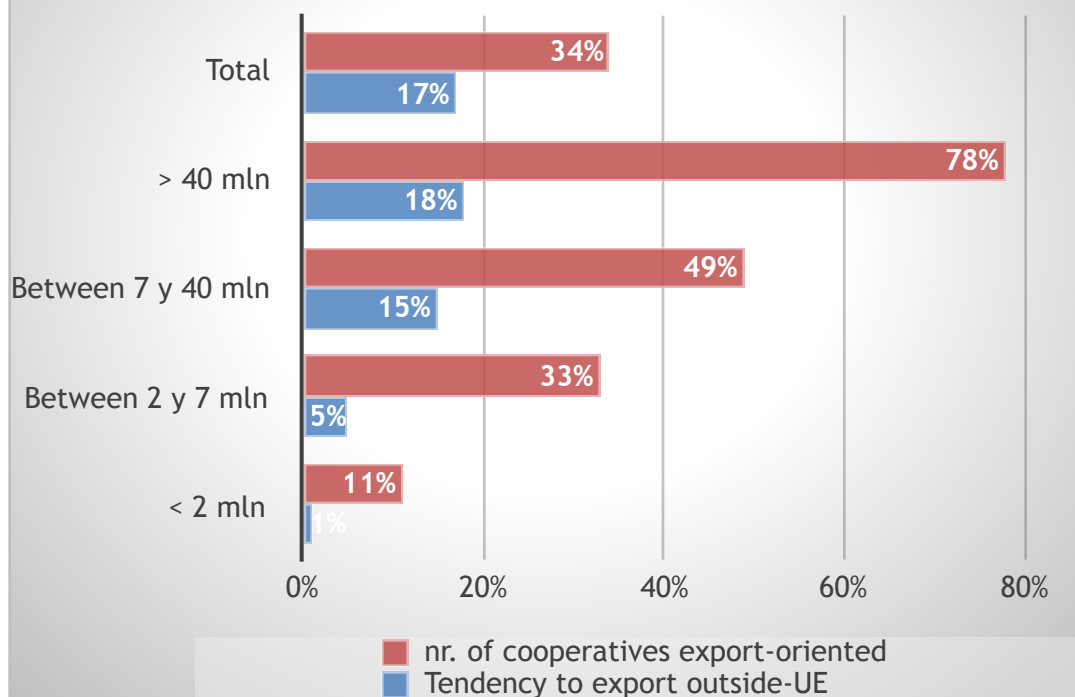
- **aggregate the offer of the agricultural products of our members,**
- **Process raw materials to get final products**
- **Trade these products at national level and worldwide**



KEY FACTORS

- Cooperatives lead aggregation;
- Produce and process locally (no outsourcing nor relocation)
- Provide jobs in rural areas
- Maintain a tight link with the tradition and heritage of agri-food productions

Cooperatives are becoming more export-oriented



Source: Osservatorio della cooperazione agricola italiana

Being aggregated makes cooperatives more competitive!



78% of our coops with a turnover greater than 40 million euro, export significantly in Third Countries, accounting an average of 18% their sales abroad.

The cooperatives more *export oriented*

Wine

Fruit and vegetables

Dairy products

Charcuterie



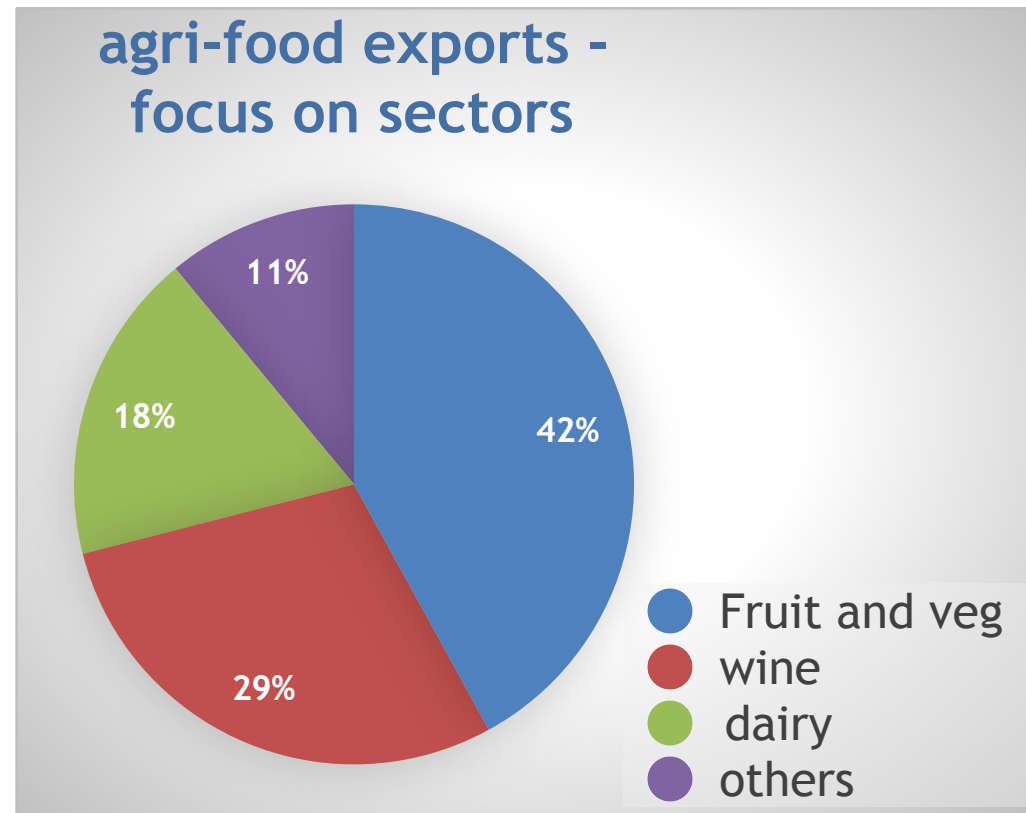
Private label

**Registered
Trademarks**

The turnover of agri-food exports made by cooperatives is 6.535.800.000 \$

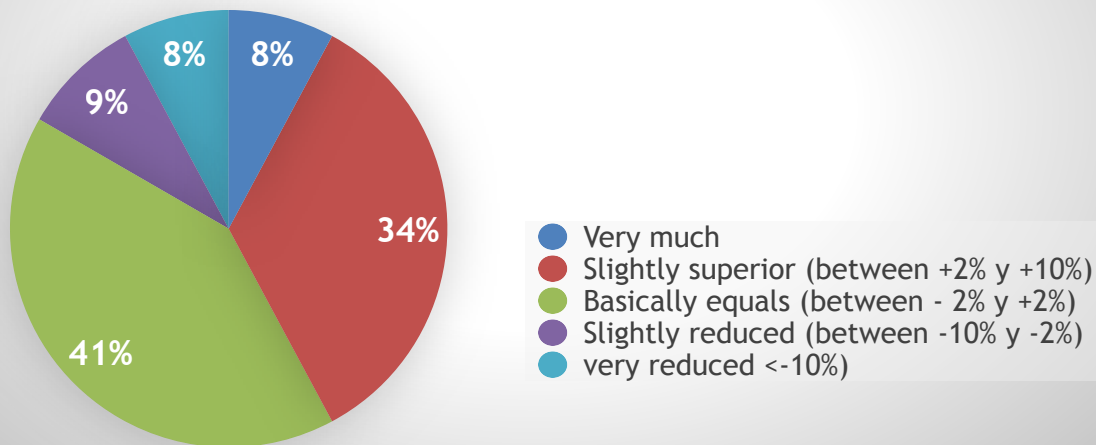


Cooperatives represent the 20% of the total value of the italian agri-food exports



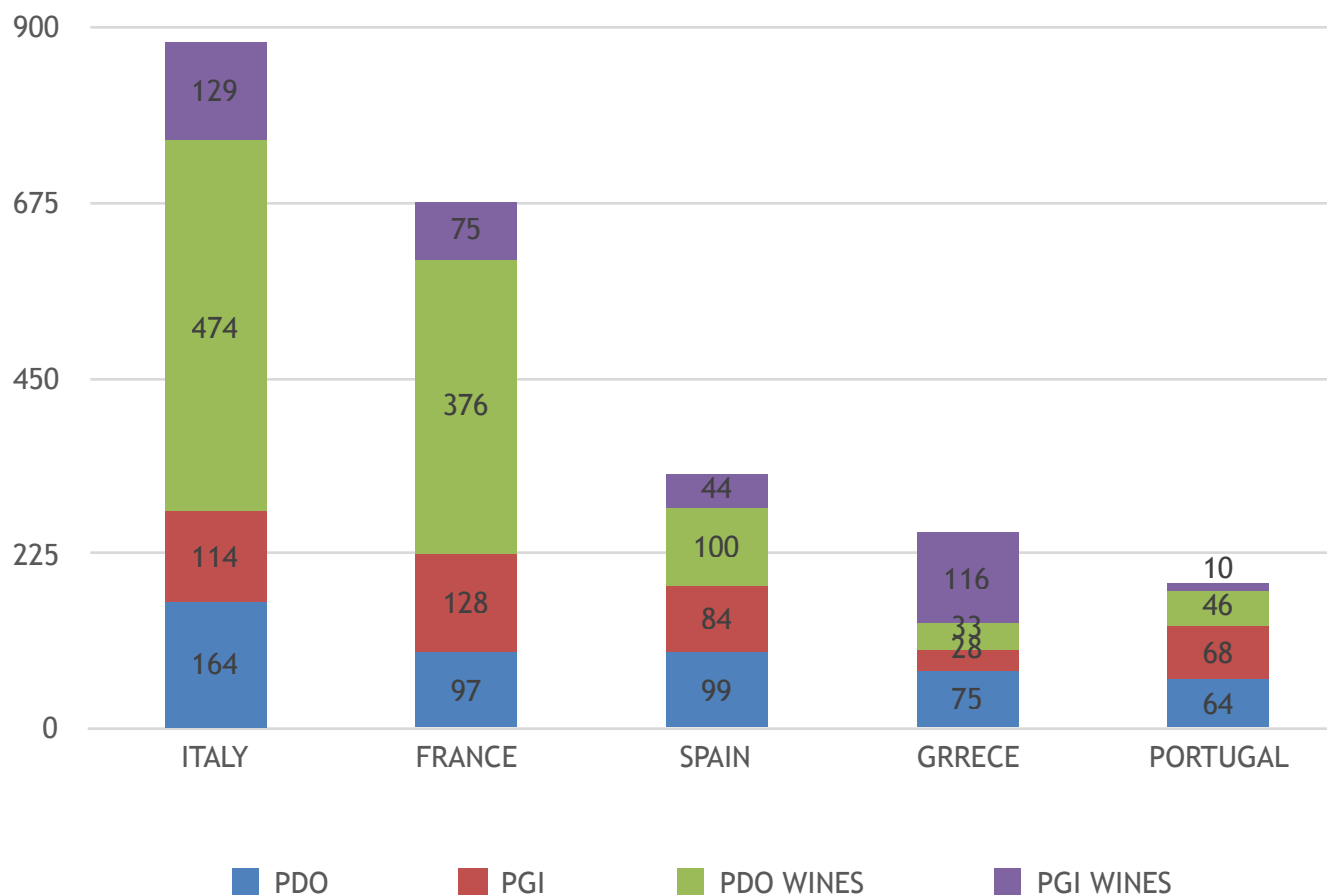
42% of our cooperatives say that exporting is convenient and anyhow “positive” in the 83% of the cases

Difference of price sales in other Countries compared to Italy





TOP 5



Considering the total number of GIs registered in EU, ITALY is nr.1 ...

more than 900 GIs
are Italian!



PDO



PGI



TSG

Thanks to the strong link with the origin of production, cooperatives have played a key role for the preservation of the national agri-food traditions.

Cooperatives play a key role in quality productions

Some examples in the dairy sector:

- 60% Grana Padano DOP
- 75% Asiago DOP,
- 75% Fontina DOP,
- 75% Montasio DOP,
- 75% Pecorino Romano DOP,
- 80% Parmigiano Reggiano,



Since 2011 Italy has presented several promotional campaigns thanks to EU funds.

The number of programs has significantly increased during the last years.

- 2012: 3 programs
→ 2 F&V; 1 wines
- 2013: 3 programs
→ PDO-PGI schemes
- 2014: 6 programs
→ 2 organic, 2 PDO-PGI schemes;
1 dairy; 1 F&V
- 2015-2016: high nr. of applications
submitted by Italy:
3 multi programs + 45 simple programs!
→ 1/4 of the total applications sent for
simple programs!



Made in Italy?

- Use of colors, imaginaries or flags that evoke an Italian origin
- Use of words or brands that suggest an Italian sounding
- Reference to the Italian territory, culture or tradition
- Italian communities established outside the EU (e.g. U.S.A)



Made in Italy?



Made in Italy?



Made in Italy?



Conclusions:

- **Aggregation**
- **Quality and quantities**
- **Diversification and distinction**
- **Market access**
- **Promotional campaigns (Italian sounding)**



Thanks!
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