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Ministry of Environment Water & Agriculture



Benchmark report on the agricultural cooperatives sector development in the Kingdom of Saudi Arabia

COP/051/2022/1



*Strengthening MoEWA's Capacity to implement its Sustainable Rural Agricultural Development
Programme (2019-2025) (UTF/SAU/051/SAU)*

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Disclaimer

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Abbreviation and Acronyms

ACU	Arab Cooperatives Union
ADB	Agriculture Development Bank
AP	Asia Pacific
BCA	Beekeepers Cooperative Association
BoD	Board of Directors
CCCI	Council of Chambers of Commerce and Industry
CEDA	Council of Economic and Development Affairs
CEI	Cooperative Economy Index
COGECA	Confédération Générale des Coopératives Agricoles de l'Union Européenne/ General Committee for Agricultural Cooperation in the European Union
COPAC	Committee for the Promotion and Advancement of Cooperatives
CSC	Cooperative Societies' Council
FAO	Food and Agriculture Organization of the United Nations
GAS	General Authority for Statistics
GCC	Gulf Cooperation Council
ICA	International Cooperative Alliance
ILO	International Labour Organization
ISIC	International Standard Industrial Classification
JMDA	Jazan Mountains Development Authority
KSA	Kingdom of Saudi Arabia
MENA	Middle East and North Africa
MoEWA	Ministry of Environment, Water and Agriculture
MoHRSD	Ministry of Human Resource and Social Development
MoMRA	Ministry of Municipalities and Rural Affairs
NAS	National Agriculture Strategy
NES	National Environment Strategy
NPO	National Program Officer
NTP	National Transformation Program
OCAT	Organizational Capacity Assessment Tool
OCDC	Overseas Cooperatives Development Council
PIFs	Public Investment Funds
SC	Supervisory Committee
SDG	Sustainable Development Goal
SFVC	Sustainable Food Value Chain
SMEA	Small and Medium Enterprises Authority
SPI	Social Progress Index
SRAD	Sustainable Rural Agriculture Development
SSE	Solidarity and Social Economy
SWOT	Strengths, Weaknesses, Opportunities and Threats
TA	Technical Advisor
TNA	Training Needs Assessment
TQC	Total Quality Control
UN	United Nations
UNDESA	United Nations Department for Economics and Social Affairs
UNDP	United Nations Development Program
USDA	United States Department of Agriculture
VC	Value Chain
WB	World Bank

Saudi Arabia Vision 2030

On April 25, 2016, the Kingdom of Saudi Arabia adopted its Vision 2030, which constitutes an ambitious plan to transform the Saudi economy away from its dependence on oil. The Saudi Arabia's Vision 2030 is built around three themes: a vibrant society, a thriving economy, and an ambitious nation. The Vision 2030 has 6 overarching objectives (level 1), 27 branch objectives (level 2) and 96 strategic objectives (level 3). Building rural institutions such as agricultural cooperatives is important in part of achieving the vision.

Foreword

The Sustainable Rural Agricultural Development (SRAD) Program (2019-2025) has been jointly formulated by FAO and the Ministry of Environment, Water and Agriculture (MoEWA). The Government of the Kingdom of Saudi Arabia (KSA) has requested, through MoEWA - from the FAO to support the implementation of this program. The SRAD Project is a flagship program of the MoEWA, which has been formulated within the context of the Saudi Vision 2030. The program is also consistent with the national development goals as articulated in Vision 2030 and National Transformation Program (NTP); contributes directly to the achievement of the objectives of the National Agriculture Strategy (NAS) and the National Environment Strategy (NES).

The program comprises nine components including the development of coffee Arabica production, processing and marketing; development of beekeeping and honey production; development of rose production and trade; development of sub-tropical fruits production, processing and marketing; strengthening the capacity of artisanal fishermen and small-scale fish farmers; strengthening the capacity of small-scale livestock herders; development of rain-fed cereals production; enhancing value addition from smallholdings and rural activities; and strengthening MoEWA's capacity in sustainable management of rangelands, forests and natural resources to support rural livelihoods.

Benchmarking with best-performing countries in Cooperative sector development is among the key activities that were undertaken. This was to identify key parameters for developing strong agricultural cooperatives in the Kingdom and identify countries for knowledge sharing among the cooperative stakeholders.

FAO Program Director
Saudi Arabia Country Office

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Executive Summary

The cooperatives development in the Kingdom of Saudi Arabia (KSA) is relatively young and weak compared to some of the neighbouring countries and other best-performing countries in the world – Asia (e.g., Japan and South Korea); Oceania (e.g., New Zealand); Europe (e.g., France, Spain, Germany, Switzerland, The Netherlands); and North America (e.g., Canada and USA). This is regarding the Cooperative Economic Index (CEI) and Social Progress Index (SPI) surveys, as regularly conducted by the World Cooperative Monitor.

This report highlights the cooperatives' sector development in the world concerning the philosophy, identity, values, and principles of cooperatives. It further highlights the historical landmarks of the cooperatives movement in the world and describes the global status of cooperatives' development and performance and rankings by sector, region and country. Specifically, the report highlights the performance of agricultural cooperatives around the world. The report then highlights experiences of the cooperatives' development in several countries in the Arab world, and around the world.

KSA can benchmark with various best-performing countries in terms of cooperatives development on several parameters such as Legislation Framework, Cooperative business models, Membership/ Population penetration, Governance Structure and Systems, Contribution to the Economy, and Research and Information.

This report is, to help the line Ministries in charge of cooperatives and agriculture to broadly rethink and redefine the cooperative development structure, systems, and strategies. To help them make the cooperatives as growth engines for agricultural value chain and rural economies; while helping the smallholders inclusively access resources, services, and markets. The report is further meant to specifically help the line Ministries in collaboration with FAO, develop and facilitate capacity building initiatives and develop and/or review various cooperatives development tools for different cadres of stakeholders from the national to provincial and governorate levels, and cooperatives, including officers, leaders, and members. The report is also a precursor for continuous capacity assessments of cooperative organization and business capacities and developing the home-grown models and reviewing the cooperative legislation frameworks.

1.0 Introduction

1.1 Background

This benchmark report was developed under the Sustainable Rural Agricultural Development (SRAD) Project (2019-2025). The project has been jointly formulated and implemented by FAO and the Kingdom of Saudi Arabia's (KSA) Ministry of Environment, Water, and Agriculture (MoEWA). Among other components, the project targets the development of smallholders in the fisheries sector. One of the SRAD project outputs is to strengthen smallholders' rural agricultural cooperatives and associations. It is on this basis; the situation analysis of the existing Rose farmer cooperatives in target regions was conducted.

1.2 Objective of the Assessment

The objectives of this report were to:

1. Understand the development of the cooperative in KSA
2. Understand the KSA Rose sector and the Rose farmer cooperatives
1. Identify and understand the unique situation (strengths, weaknesses, opportunities, and threats) of Rose farmer Cooperatives in KSA
2. Make suggestions on the areas for strengthening Rose farmer cooperatives in KSA.

1.3 Benchmark Methodology

The benchmark involved primary data collection through multiple methods, including observation, key informant interviews (KIIs), and focus group discussions (FGDs), as well as secondary data collection through a desk research of existing cooperatives development profiles of KSA's enamouring Gulf countries and the best-performing countries as identified by the [World Cooperative Monitor](#) (WCM).

1.4 Limitations of the Assessment process

Notwithstanding the design, this assessment process had its limitations.

1. Limited time to explore cooperative development profiles of several best-performing countries in the world.
2. In some cases, findings from the description pointed to the need for wider analysis and investigation, as the mixed situation was noted among the individual cooperatives within the Rose value chains or the same region.

1.5 Outline of the Assessment Report

This report is organized into four sections. Section 1 introduces the report with the justification of and approach to the situation analysis. Section 2 discusses the general cooperative development in the World. It gives the historical development perspectives and major milestones in the global development of cooperatives and cooperative rankings. Section 3 focuses on the description of the cooperative development profiles of Arab World and the other parts of the world. Section 4 highlights the benchmarking countries on various cooperatives development parameters, the Kingdom could benchmark.

2. Cooperatives sector development in the World

2.1 Philosophy, identity, values, and principles of cooperatives

The concept of a cooperative has several definitions which are driven by a general understanding among practitioners that cooperatives are people-centred enterprises owned, controlled, and run by and for their members to realize their common economic, social, and cultural needs and aspirations.

Nonetheless, the most commonly used definition adopted by the [International Cooperatives Alliance \(ICA\)](#) states that a cooperative is an "autonomous association of persons united voluntarily to meet their common economic, social, and cultural needs and aspirations through a jointly-owned and democratically-controlled enterprise". For this assessment, a cooperative is defined as "a **user-owned** and **user-controlled** business from which **benefits** are derived and distributed equitably based on use or as a business owned and controlled by the people who use its services"¹.

This common understanding is put into practice by adhering to certain values and principles, which have been revised several times by ICA. Cooperatives are driven by values, not just profit, cooperatives are based on the values of self-help, self-responsibility, democracy, equality, equity, and solidarity.

There are seven globally agreed-upon cooperatives principles as illustrated in Table 1 below:

Table 1: The universal cooperative principles

No.	Principle	Definition
1.	Voluntary and open membership	Cooperatives are voluntary organizations, open to all persons able to use their services and willing to accept the responsibilities of membership, without gender, social, racial, political, or religious discrimination.
2.	Democratic member control	Cooperatives are democratic organizations controlled by their members, who actively participate in setting their policies and making decisions. Men and women serving as elected representatives are accountable to the membership. In primary cooperatives, members have equal voting rights (one member, one vote) and cooperatives at other levels are also organized democratically.
3.	Member economic participation	Members contribute equitably to, and democratically control, the capital of their cooperative. At least part of that capital is usually the common property of the cooperative. Members usually receive limited compensation, if any, on capital subscribed as a condition of membership. Members allocate surpluses for any or all the following purposes: developing their cooperative, possibly by setting up reserves, part of which at least would be indivisible; benefiting members in proportion to their transactions with the cooperative; supporting other activities approved by the membership.
4.	Autonomy and independence	Cooperatives are autonomous, self-help organizations controlled by their members. If they enter into agreements with other organizations, including governments, or raise capital from external sources, they do so on terms that ensure democratic control by their members and maintain their cooperative autonomy.
5.	Education, training, and information	Cooperatives provide education and training for their members, elected representatives, managers, and employees so they can contribute effectively to the development of their cooperatives. They inform the general public - particularly young people and opinion leaders - about the nature and benefits of cooperation.
6.	Cooperation among cooperatives	Cooperatives serve their members most effectively and strengthen the cooperative movement by working together through local, national, regional, and international structures.
7.	Concern for community	Cooperatives work for the sustainable development of their communities through policies approved by their members.

Source: ICA website

¹ USDA (2011) Understanding Cooperatives: Cooperative Business Principles

2.2 Historical landmarks of the cooperatives movement in the world

The cooperative movement began in Europe in the 19th century when the industrial revolution and the increasing mechanism of the economy transformed society and threatened the livelihoods of many workers.

Major historical landmarks of the modern cooperative movement development have been outlined in Table 2 below:

Table 2: Historical landmarks of cooperatives development in the World

Period	Development issues
1761	The first documented consumer cooperative was founded in 1761 in Scotland where local weavers in Fenwick formed the Fenwick Weavers' Society to sell oatmeal at a discount price
1812	After the establishment of the Fenwick Weavers' Society, several cooperative societies were formed including Lennox town Friendly Victualling Society, founded in 1812 and by 1830, there were several hundred cooperatives.
1831	The first cooperative congress was held in Manchester, England
1844	The Rochdale Society of Equitable Pioneers (in England) is established as a prototype for modern cooperatives as we understand them today with cooperative principles
1848	Friedrich created an association that helped small farmers to acquire cattle without mortgaging their assets and going into debt. The association quickly evolved into a credit-cooperative society
1850	The first agricultural cooperatives were created also in Europe in the second half of the nineteenth century to about 1899
1862	Raiffeisen Cooperative banks in Germany Europe are established as the early credit unions – named after Friedrich Wilhelm Raiffeisen, a German mayor and cooperative pioneer
1895	The International Cooperative Alliance (ICA) was founded as an independent association that unites, represents, and serves cooperatives worldwide
1937	ICA defined cooperative principles for the first time
1959	The national agricultural cooperatives created the General Committee for Agricultural Cooperation in the European Union (COGECA ²) as the European cooperative umbrella organization
1960	The ICA Regional Office for Asia and the Pacific (The International Cooperative Alliance Asia-Pacific) was established in New Delhi, India
1966	ICA defined cooperative principles for the second time
1968	The ICA Regional Office for Africa (Alliance Africa) was established with two offices in Tanzania and Burkina Faso.
1971	ILO and FAO established the Committee for the Promotion and Advancement of Cooperatives to Promote Agricultural Cooperation (COPAC ³).
1990	The ICA Regional Office of the Americas (Cooperatives of the Americas) was established in San José, Costa Rica.
1995	The ICA revised cooperative principles to the current edition
2006	The ICA Regional Office for Europe (Cooperatives Europe) was established in Brussels.
2009	COGECA launched the European Award for Cooperative Innovation to raise awareness and promote innovation in European agricultural cooperatives.
2012	United Nations (UN) celebrated the international year of cooperatives and declared the 2020 Cooperatives Decade
2014	The United Nations Department for Economic and Social Affairs conduct global cooperatives' development and performance rankings.
2016	The United Nations Educational, Scientific and Cultural Organization (UNESCO) inscribed "Idea and practice of organizing shared interests in

² COGECA stands for Confédération Générale des Coopératives Agricoles de l'Union Européenne

³ COPAC members are: United Nations Department of Economic and Social development (UNDESA), Food and Agriculture organization of the United Nations (FAO), International Labour Organization (ILO), International Cooperative Alliance (ICA), and World Farmers Organization (WFO).

Period	Development issues
	cooperatives" on the Representative List of the Intangible Cultural Heritage of Humanity

2.3 Global status of cooperatives development and performance

As value-based and principle-driven organizations, cooperative enterprises are by nature a sustainable and participatory form of business. They emphasize job security and improved working conditions, pay competitive wages, promote additional income through profit-sharing and distribution of dividends, and support community facilities and services such as health clinics and schools. Cooperatives foster knowledge and practices on social inclusion.

According to research by McKinsey and Company (2012) report, cooperatives are better than publicly listed companies at growing market share. Cooperatives grow at 2.2 per cent, while companies grow at 1.1 per cent.

2.3.1 Ranking by sector

According to the United Nations Department of Economic and Social Affairs (UNDESA) (2014) Report, globally there are:

1. 2.6 million Cooperatives with over 1 billion memberships and clients. With this measure, at least 1 in every 6 people on average in the world has a membership or is a client of a cooperative.
2. 12.6 million employees working in 770,000 Cooperative offices and Outlets (or roughly 0.2 per cent of the world's population)
3. USD 20 Trillion in Cooperative Assets generate USD 3 trillion in Annual Revenue

The global cooperatives' performance statistics per sector are estimated in Table 3 below.

Table 3: Global cooperatives performance statistics by sector

Sector	No. of cooperatives	Members/Clients	No. Of Employees	Assets base (in USD)	Annual Gross Revenue (in USD)
Banking/Credit Unions	210,559	703,070,123	2,452,130	11,262,671,499,563	167,413,448,242
Insurance	3,644	248,864	961,409	7,500,074,558,634	1,219,472,098,520
Agriculture/Food	1,224,650	122,120,167	1,181,682	133,811,867,460	337,705,145,870
Utilities	1,714	19,858,921	94,882	141,544,317,085	41,944,022,702
Consumer	81,437	97,869,940	875,181	243,888,763,326	154,573,071,133
Worker	84,799	4,369,600	1,218,751	1,393,874,620	124,821,200,417
Housing	15,247	16,383,048	102,823	52,405,481,487	20,709,518,041
Health	1,700	3,441,221	153,180	485,789,252	4,075,077,199
Education and Social	87,998	21,876,052	497,445	840,678,955	12,305,812,264
Purchasing or Marketing	41,865	26,256,054	3,402,008	239,000,352,255	736,631,647,399
Others	760,985	56,296,177	1,671,257	31,310,913,789	143,245,072,152
Totals	2,514,598	1,071,790,167	12,610,748	19,607,428,096,426	2,962,896,113,939

Source: [UNDESA](#) - Global census on cooperatives results of 2014

This report further states that, if combined, the global cooperative economy is 2 larger than France's economy and places right behind Germany's economy as the 5th largest economic unit if it were a united country. However, cooperatives are usually locally owned and operated enterprises. Nonetheless, at a national level, the cooperative economy comprises over 10 per cent of the Gross Domestic Product in 4 countries in the world (New Zealand (20 per cent), Netherlands (18 per cent), France (18 per cent) and Finland (14 per cent)).

2.3.2 Ranking by region

Regionally, the cooperative performance statistics are estimated in Table 4 below:

Table 4: Global cooperatives performance statistics by region

Region	No. pf cooperatives	Members/Clients	% Population Coop Members	No. Of Employees	% of Population Employed in Coops	Assets base (in USD)	Annual Gross Revenue (in USD)	Gross Revenue % of GDP
Africa - Sub Sahara	85,260	18,509,605	2.73%	10,914	0.00%	10,847,166,275	851,640,000	0.08%
Asia	1,933,299	484,105,695	12.68%	4,306,521	0.11%	3,847,329,029,490	653,629,184,870	3.25%
Caribbean	1,049	3,583,511	12.94%	54,569	0.20%	5,934,856,987	182,714,007	0.13%
Europe	356,380	368,006,463	45.55%	5,248,852	0.65%	11,688,164,988,276	1,482,481,568,728	7.08%
Latin America	42,765	44,179,104	7.81%	816,122	0.14%	83,886,544,610	18,360,221,538	0.33%
MENA	162,779	4,537,084	1.57%	37,714	0.01%	31,681,636,000	3,619,358,000	0.27%
North America	31,078	134,725,891	38.63%	1,675,778	0.48%	3,825,837,112,751	744,228,134,380	4.12%
Oceania	1,988	14,142,814	37.80%	460,278	1.23%	113,746,762,037	59,543,292,416	3.46%
Totals	2,614,598	1,071,790,167	19.96%	12,610,748	0.35%	19,607,428,096,426	2,962,896,113,939	2.34%

Source: [UNDESA](#) - Global census on cooperatives results of 2014

2.3.3 Ranking by country

Global Census on Cooperatives was conducted in 2014 based on three ratios – membership penetration of cooperatives relative to the total population (i.e., membership/population), employment by cooperatives relative to the total population (i.e., employment/population) and annual gross revenue or turnover of all cooperatives in a country relative to the country’s GDP. The three ratios were then evenly weighted within the Cooperative Economy Index to provide a single measure to determine the most cooperative economies globally. Furthermore, the cooperative movements were subjected to 54 social impact measures and included items like basic human needs, opportunity, and access to knowledge to rank them on Social Progress Index (SPI).

Table 5 below summarizes the global rankings of the cooperative movements across the globe:

Table 5: Global cooperative rankings by country: The top 10!

Rank	Memberships and Clients/Population	Employment/Population	Annual Gross Revenue/GDP	Cooperative Economy Index (CEI)	Social Progress Index (SPI)
1.	France	New Zealand	New Zealand	New Zealand	New Zealand
2.	Finland	Switzerland	Netherlands	France	Switzerland
3.	Switzerland	Italy	France	Switzerland	Iceland
4.	Austria	France	Finland	Finland	Netherlands
5.	Dominica	Malta	Luxembourg	Italy	Norway
6.	Netherlands	Finland	Germany	Netherlands	Sweden
7.	Ireland	Germany	Ireland	Germany	Canada
8.	Germany	Netherlands	Italy	Austria	Finland
9.	Cyprus	Spain	Denmark	Denmark	Denmark
10.	Australia	Norway	Poland	Norway	Australia

Source: [UNDESA](#) - Global census on cooperatives results of 2014

It is important to note that, the survey placed New Zealand at number one in both its CEI and SPI, and that two-thirds of the countries listed in the top ten most cooperative economies also make up 8 of the top 12 spots on the SPI.

Box 1:

Cooperatives' performance measurement parameters

1. Globally, cooperatives' development across countries are measured using the Cooperative Economic Index (CEI) and Social Progress Index (SPI).
2. From the Tables, three indicators can be derived and used for the relative assessment of agricultural cooperatives KSA: Average member per cooperative, Average Asset per cooperative and Average Revenue per cooperative.
3. Further Revenue-Asset ratio helps in measuring the economic efficiency of cooperatives as

business enterprises and its regional and sectoral comparison. For agricultural cooperatives, this ratio is generally very high.

Point 6: Cooperatives, in general, are a world phenomenon. They are used in every society – in first world and third world alike; in Europe, the Americas, Asia, and the Arab world. The development of cooperatives in Saudi Arabia is important.

2.4 Significance of cooperatives in achieving SDGs

Cooperatives have great growth opportunities. This is, according to McKinsey and Company (2012), because they put members first, deliver a unique member and customer experience, have member and customer proximity advantage, they can easily serve several members' needs at the same time (breaking organizational silos), and can organize to grow an adjacent market.

In this regard, cooperatives do and can play an important role in achieving sustainable development goals (SDGs). According to International Labour Organization (ILO) and ICA report, the promotion and expansion of cooperatives is an important instrument for achieving the SDGs.

In essence, cooperatives are three pathways for transformational development⁴. They are Economic Pathway (alleviating poverty and stimulating economic growth); the Democratic Pathway (providing a framework for democratic participation); and Social Pathway (building social capital and trust (including before and after conflict), bridging ethnic, religious, and political divides; and providing social services.

Point 7: Cooperatives across societies play a critical role in socioeconomic development. With emerging global forces and trends, deliberate promotion, and development of cooperatives in Saudi Arabia could help address and mitigate some of these trends (such as population growth, youth unemployment, climate change, technological changes, urbanization etc.), while realizing Sustainable Development Goals (SDGs) and Saudi Vision 2030.

2.5 Understanding agricultural cooperatives in the World

According to FAO, cooperatives play important roles in supporting small-scale farmers and overcoming barriers facing them. Thus, the sole purpose of the cooperative, including the agricultural cooperative, is to help one achieve his objectives while at the same time assisting others in achieving theirs. An agricultural cooperative as a special type of cooperative is defined as “agricultural producer-owned enterprises whose primary purpose is to increase members’ production and incomes by helping with a better link to finance, agricultural inputs, information, and markets.

The permeability of agricultural cooperatives makes them dynamic for socio-economic development. According to the ILO (2020) report, agricultural cooperatives are grouped under producer cooperatives. In this grouping, members’ interest relates to the production activity. Members share a common short-term interest in covering production costs and long-term interest in reduced risk, a sustainable source of income and market development. Considering the importance of the economic functions associated with these different purposes regarding calculating their economic contribution or performance, agricultural cooperatives may eventually be developed into sub-types, such as 'marketing cooperatives', 'processing cooperatives', 'supply or purchasing cooperatives', and 'multi-purpose cooperatives' as their combination, as well as 'undetermined' when no specific purpose is indicated. For internationally comparable statistics, it would be preferable to check which is the principal activity of these cooperatives following the method of treatment of mixed activities in the UN International Standard Industrial Classification (ISIC)⁵.

Irrespective of the sectoral classification, agriculture and food-oriented cooperatives are continuing to grow across the world. According to research McKinsey and Company (2012) report, agriculture and food industry-

⁴ Cooperatives: Pathways to Economic, Democratic and Social Development in the Global Economy, OCDC Pathways paper, August 2007.

⁵ UN, 2008; pp. 22–27

oriented cooperatives grow at a rate of 7.7 per cent compared to companies in the same industry which are growing at a rate of 6.3 per cent.

2.5.1 Performance of the agricultural cooperatives globally

In terms of global patronage and reach, agricultural cooperatives are also the highest in number and reach out to and serve more population than any other type of cooperative around the world. The UNDESA 2014 report indicates that the agricultural cooperatives movement compared to other sectoral cooperative movements in the world, with 48.7 per cent proportionality. Figure 1 illustrates this market share scenario.

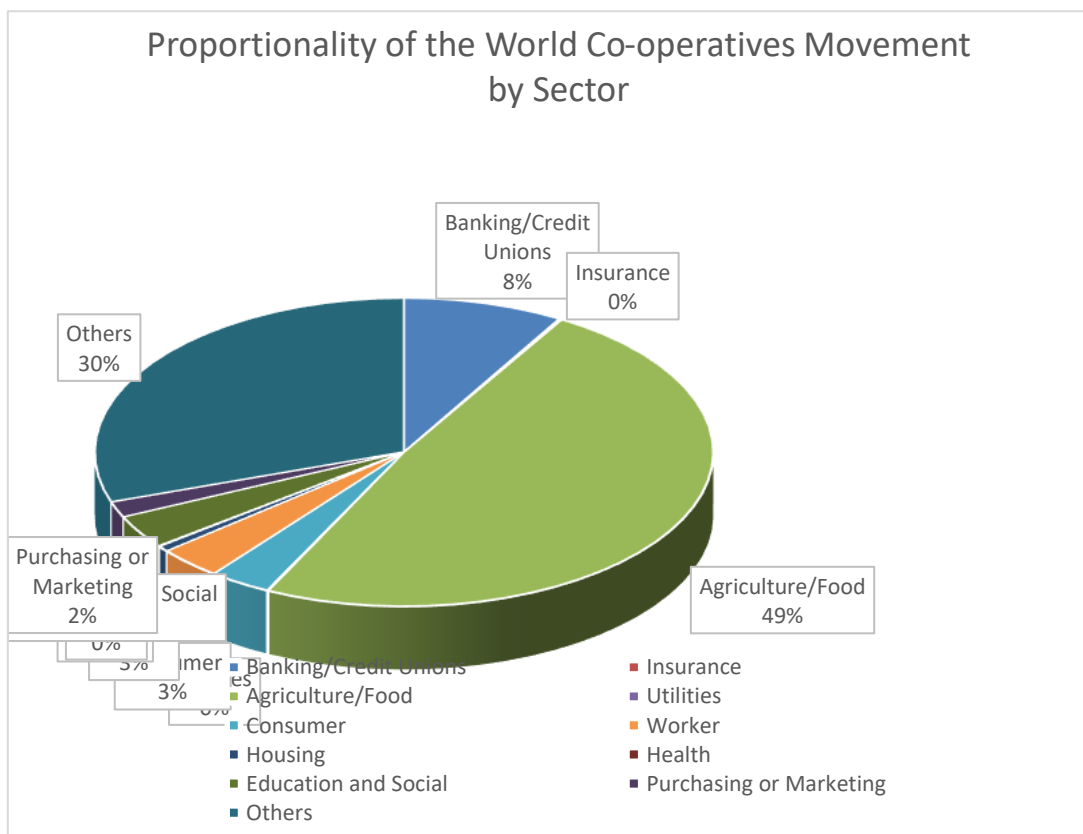


Figure 1: Proportionality of agricultural cooperatives of the overall global cooperative movement
Source: Adapted from UNDESA (2014)

According to the World Cooperative Monitor [2021](#) Report, the agriculture sector is still the leading sector in terms of usage of the cooperatives model with the agricultural-oriented cooperatives having over 28 per cent share of the cooperatives movement. Agricultural cooperatives are cooperatives that operate along the entire agricultural value chain, starting from the cultivation of agricultural products and livestock farming to the industrial processing of agricultural products and animals. This sector includes both agricultural producers' cooperatives and consortia of cooperatives (or similar arrangements) that carry out the processing and marketing of agricultural goods for their members.

Agricultural cooperatives exist in almost every country around the world – both developed and emerging economies. They are very well represented in both developed and emerging economies and contribute to food security and poverty reduction in different areas of the world. They help farmers increase their returns and income by pooling their resources to support collective arrangements and economic empowerment.

Box 2:

Common operating areas of agricultural cooperatives

1. Marketing – ranging from helping members sell their products at the first handler level, to processing,

distributing, retailing, brand positioning and exporting

2. Supplying high-quality products at reasonable prices to members.
3. Providing specialized services such as credit, utilities, insurance, quality assurance and maintenance, supplementing extension services to farmers, common infrastructures, and utilities.

2.5.2 Ranking of specific agricultural cooperatives in the World

Using a turnover in USD and turnover in international dollars, this 2021 World Cooperative Monitor report showed that there are great performing agricultural cooperatives across the world. Out of the 300 top-performing cooperatives with over 2,180.01 billion USD, 98 cooperatives are agriculture and food-oriented. The report has ranked the top 10 agricultural-oriented cooperatives across the world as highlighted in Table 6.

Table 6: Global ranking of individual agriculture and food industry-oriented cooperatives: The top 10!

Rank	Agriculture and Food Industry oriented cooperative	Country	Brief Description	Annual Turnover (Billion US \$) 2015
1.	Zen-noh	Japan	Formed in 1972, <i>ZEN-NOH</i> is the National Federation of Agricultural Cooperative Associations in Japan. It was formed by the joining of the ZENHANREN group and the ZENKOREN group.	55.13
2.	Nonghyup (National Agricultural Cooperative Federation - NACF)	Republic of Korea	Founded in 2012 <i>NH Nonghyup (NACF)</i> is a multipurpose cooperative with four main business divisions: agricultural marketing and supply, livestock marketing and supply, banking and insurance, and the extension service. NACF now serves its members and customers through 27 subsidiaries and two affiliate organizations. It represents 2.44 million individual members from 1,165 member cooperatives, out of which over 80 per cent are Korean farmers.	40.49
3.	CHS Inc.	USA	Founded on January 15, 1931, <i>CHS Inc.</i> is a Fortune 100 business owned by United States agricultural cooperatives, farmers, ranchers, and thousands of preferred stockholders.	31.90
4.	Bay Wa	Germany	Founded in 1923, <i>BayWa</i> shareholder structure is determined by the cooperative sector and focuses on Retail and agribusiness conglomerate - Trading of agricultural products, fertilizer and seeds, sale of agricultural equipment, fruit distribution	19.09
5.	Dairy Farmers of America	USA	Founded in 1998, <i>Dairy Farmers of America Inc.</i> is a national milk marketing cooperative in the United States. It is owned by and serves more than 13,000 dairy farmer-members representing more than 7,500 dairy farms in 47 states with a Head office in Kansas City, US.	15.80
6.	Land O'Lakes, Inc.	USA	Founded on July 8, 1921, <i>Land O'Lakes, Inc.</i> is an American member-owned agricultural cooperative based in the Minneapolis-St. Paul suburb of Arden Hills, Minnesota, United States, focusing on the dairy industry.	13.89
7.	Hokuren Federation of Agricultural Cooperatives	Japan	Founded on April 18, 1919, the <i>Hokuren</i> Federation of Agricultural Cooperatives operates as a business association. The Company offers agricultural material joint purchasing, agricultural product sales, and technical support services. Hokuren Federation's products include rice, vegetables, dairy products, livestock products, and gardening products.	13.87

Rank	Agriculture and Food Industry oriented cooperative	Country	Brief Description	Annual Turnover (Billion US \$) 2015
8.	Fonterra Cooperative Group	New Zealand	Founded on October 16, 2001, <i>Fonterra Cooperative Group Limited</i> is a New Zealand multinational publicly traded dairy cooperative owned by around 10,500 New Zealand farmers and is responsible for approximately 30 per cent of the world's dairy exports.	13.25
9.	FrieslandCampina	Netherlands	Founded on December 31, 2008, <i>Royal FrieslandCampina N.V.</i> is a Dutch multinational dairy cooperative which is based in Amersfoort, Netherlands. It is the result of a merger between Friesland Foods and Campina, with the Head Office in Amersfoort.	12.64
10.	Arla Foods Amba	Denmark	Founded on April 17, 2000, <i>Arla Foods amba</i> is a Danish multinational cooperative based in Viby, Denmark, and the largest producer of dairy products in Scandinavia. Arla Foods was formed as the result of a merger between the Swedish dairy cooperative Arla and the Danish dairy company MD Foods with a Head office in Viby City	11.78

Source: Adapted from World Cooperative Monitor 2021 Report.

These data sets indicate how the agricultural cooperatives are value-chain growth engines, contributing and/or can contribute to the paradigm of sustainable food systems development. Figure 7 summarizes this concept.

In Figure 2, agricultural cooperatives are increasing agricultural output, which is created by labour (including self-employment), across various core value chain processes (i.e., the multiplier loop) as the food supply for the consumer benefit. This labour is acquired by the incomes and salaries offered. This labour is also being paired with capitalization (e.g., good agricultural practices (GAP)), which in turn requires increased investment and working capital. This capital can be derived from member shareholding, retained profits or, borrowing from the financial sector driven by the accrual of domestic wealth (i.e., investment loop). Because they are formal, agricultural cooperatives make value chains develop, become larger, and more profitable. This increases the tax base and thus makes improvements in the enabling environment, and social well-being, more fiscally sustainable for even continued social support to other vulnerable people in the society (i.e., progress loop).

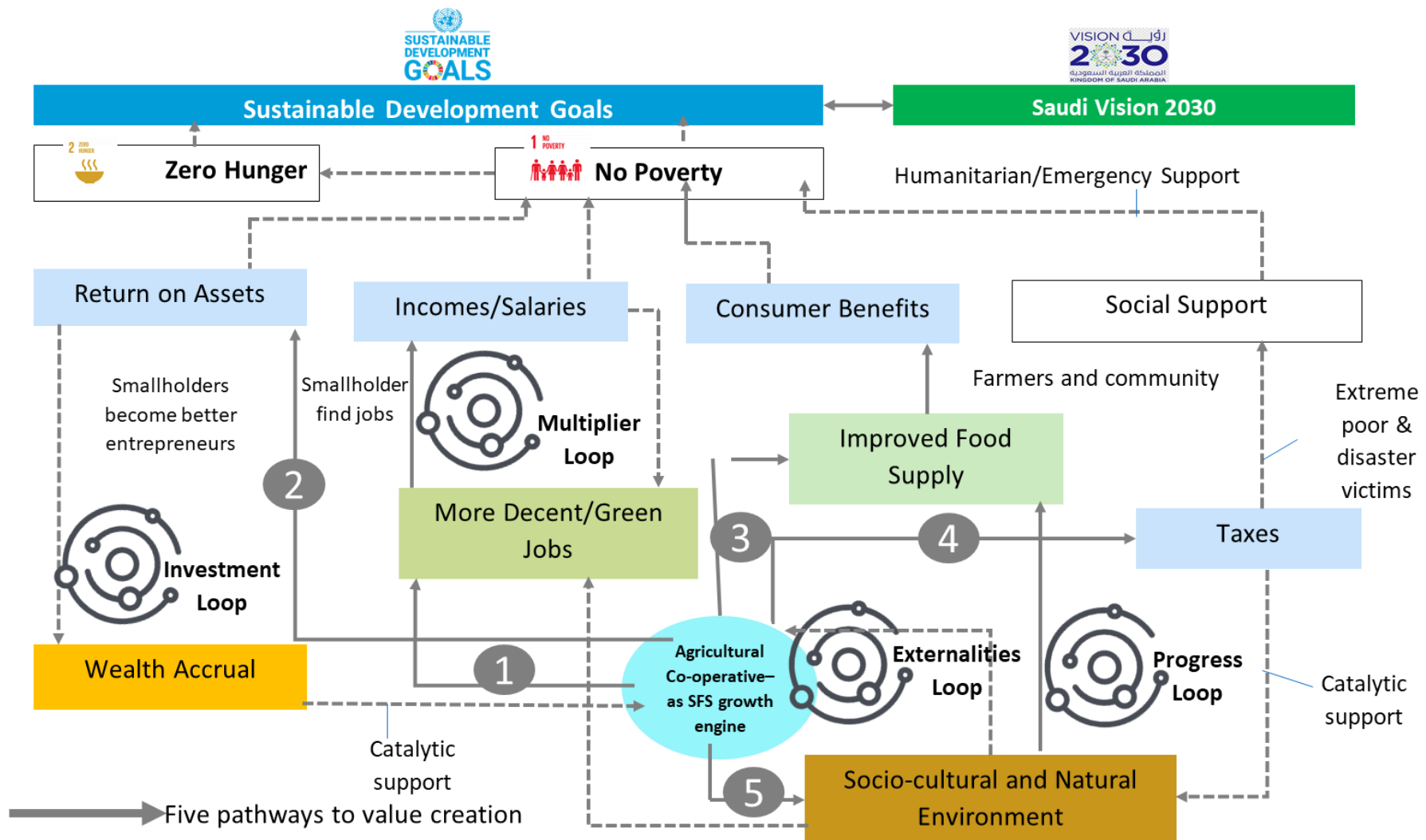


Figure 2: The place of agricultural cooperatives in the sustainable food value chain development paradigm

Point 9: Agricultural cooperatives are performing better in the parts of Americas, Europe, Asia, and Oceania compared to Gulf countries, as no cooperative from the Gulf countries features even in a top-performing cooperative in the world.

3. Cooperatives Development Experiences in Different Countries

The experience of cooperatives sector development varies with regions and countries. For the Kingdom of Saudi Arabia to develop and strengthen agriculture, it can benchmark with various countries. This can be based on learning about the different countries

1. Cooperative historical development and legislative framework
2. Cooperative Governance Structure
3. Economic Importance of the Cooperative Movement

Some of the countries in which lessons are being drawn are drawn from Asia, Europe, America, Oceania and the Middle East and North Africa regions.

3.1 Cooperatives sector development in Arab World

In the Arab World, the notion of self-help (cooperative spirit) has been in existence. There have been informal types of self-help help societies. International Labour Organization (ILO) has established that these informal groupings mostly common in local communities have exhibited a combination of 'self-help' and 'charity'. The most common term in the Arabic language used to define organizations such as informal associations and cooperatives is '*Jam'iyyat*'. These self-help and charity groups are known to carry out social services and support poor families. According to Rowshan⁶ (2010), this may be attributable to the fact that cooperatives and Islam have many beliefs and values in common. The two viewpoints emphasize the significance of solidarity, human dignity, and socio-economic justice for all.

Nonetheless, it was until the 1900s that the 'formal' cooperative type "*al diwaniya*" was introduced in the Arab world, as a different kind of enterprise, while being hinged on the local socio-cultural and religious practices. In Palestine, for instance, it is natural to do business cooperatively, because of the strong traditional family and community ties; it is a way of survival for Palestinians⁷.

According to ILO (2010), cooperative movements across the region are greatly dominated by the government. The national apex bodies for cooperatives are mandated with the role of the government agency responsible for cooperatives promotion and development, including registration and control of primary societies. The cooperatives here receive direct and indirect subsidies to distribute free or at a fair price, farm inputs and basic commodities.

In 1981, the national cooperative unions across the Arab countries established the Arab Cooperative Federation (ACF) in Baghdad, Iraq. In 1989, 14 countries met and elected Iraq as the president of the ACF. The ACF headquarters were later moved to Cairo, Egypt. The approximate number of cooperatives among the Arab nations is 30,000. In terms of sector, the cooperative movement in the region is dominated by the agricultural sector (59 per cent), consumption (29.9 per cent) and housing (5.6 per cent)⁸.

Generally, cooperatives in the Arab world are community or family/tribe-based organizations. They are included as part of civil society. As those cooperative movements in the Global North are commonly referred to as the 'third sector'; those in the Arab world are thought of as the 'fifth sector', after the State, the market, the religious community, and the Family/Tribe, while in the countries. Membership coverage is low and sometimes limited to family/tribe members. As a result, the principle of open and voluntary membership is not always applicable (ILO, 2010; Zurayk and Chaaban, 2009).

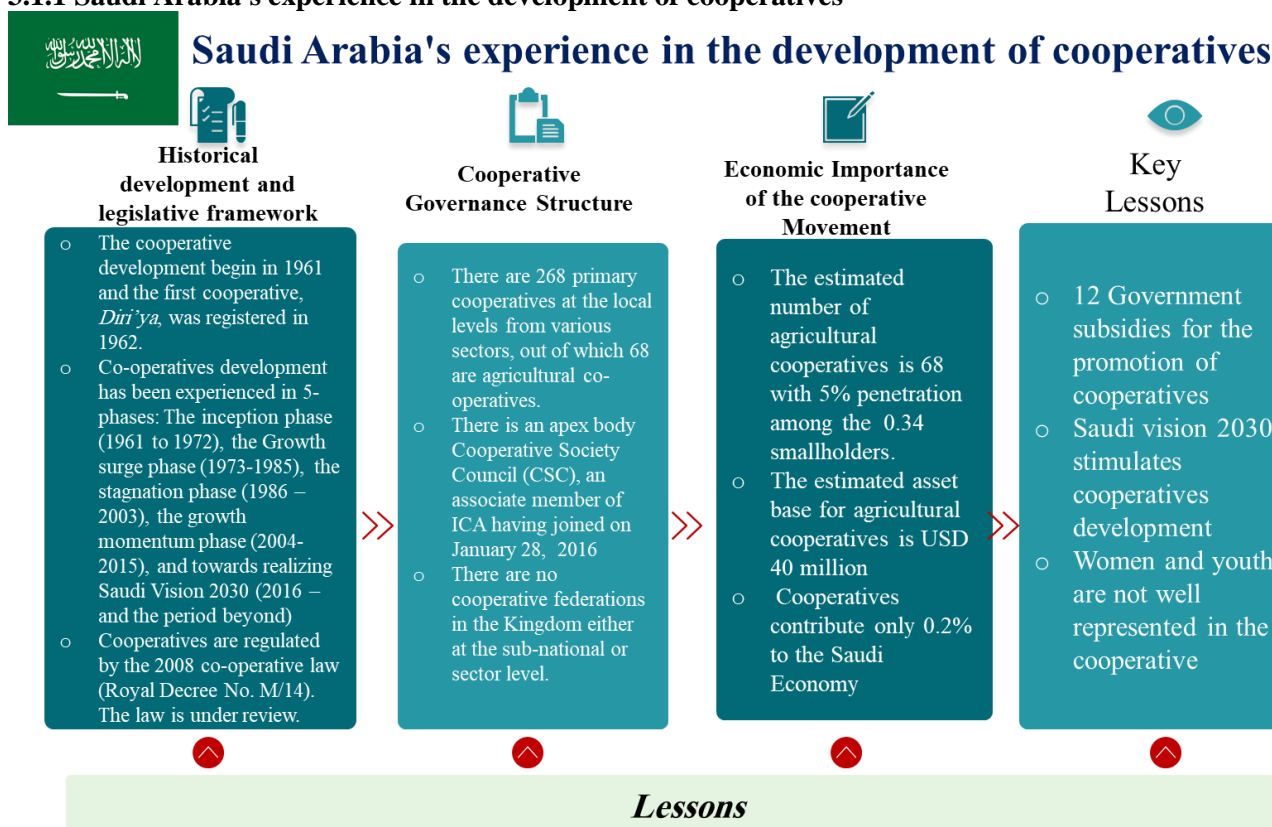
Here is the description of the cooperative movement development in some of the Arab region countries, in which KSA share several similarities, including Palestine, Yemen, Iraq, Lebanon, Jordan, Syria, and Egypt.

⁶ Rowshan Hannan (2010). Cooperatives and Islam, draft paper for discussion, the Cooperative College UK.

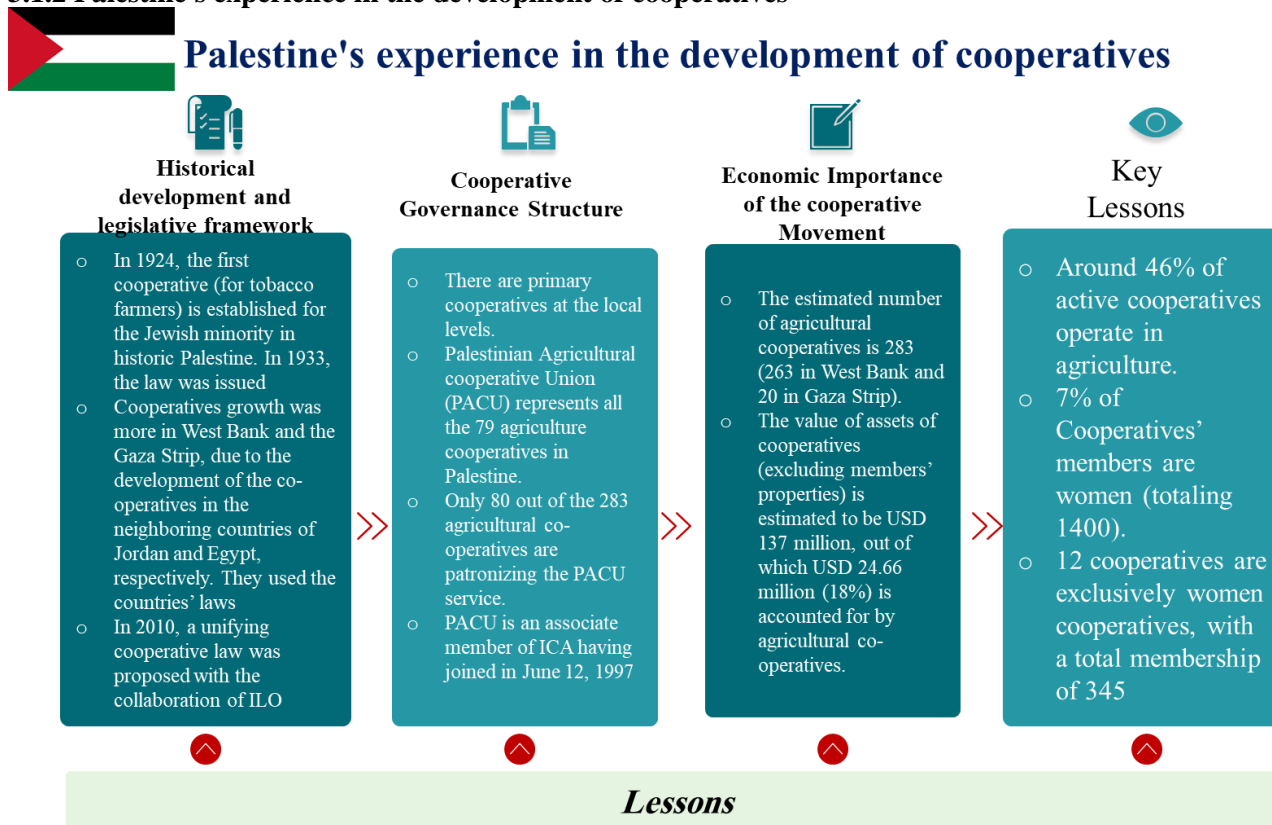
⁷ Adnan Obeidat (2005). Palestinian Cooperative Development, a study funded by the UNDP.

⁸ Mohamed Ahmad Abdel Thaher (n.d.). The Development of the Cooperative Movement in Egypt, the Arab States, and the World. Arab Cooperative Federation. Arab Centre for Cooperative Development. pg. 78-79.

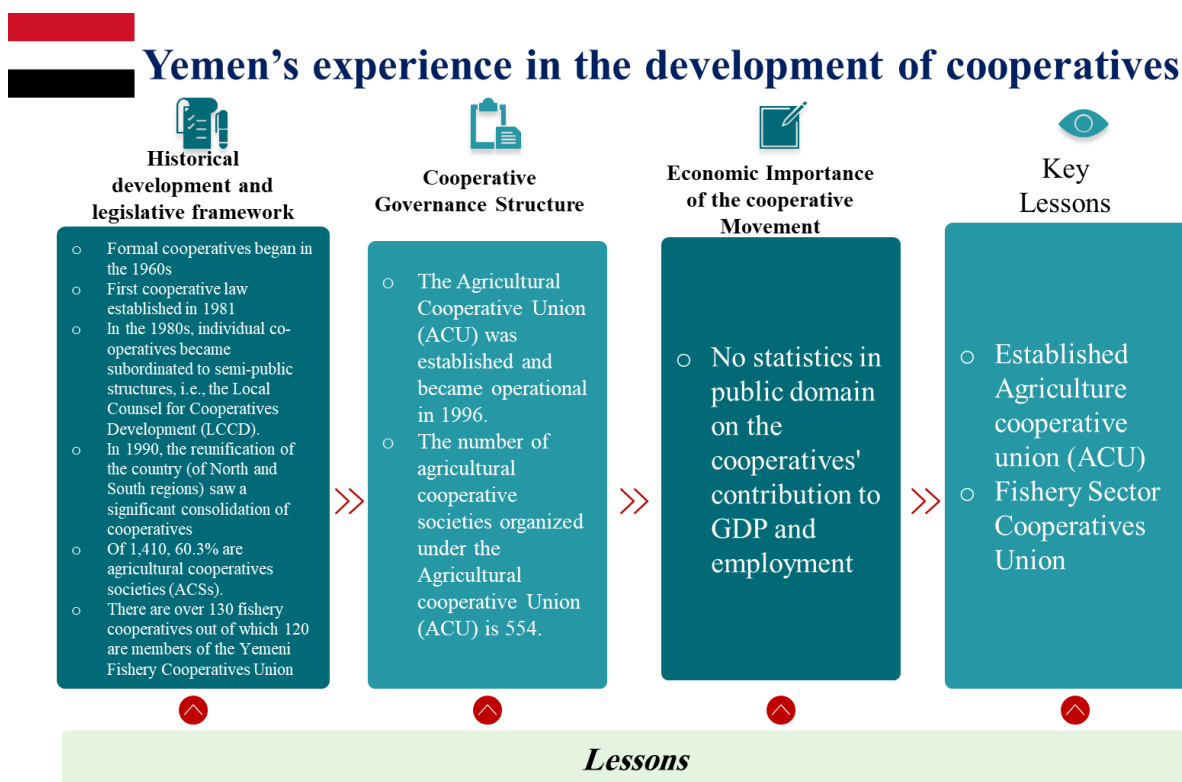
3.1.1 Saudi Arabia's experience in the development of cooperatives



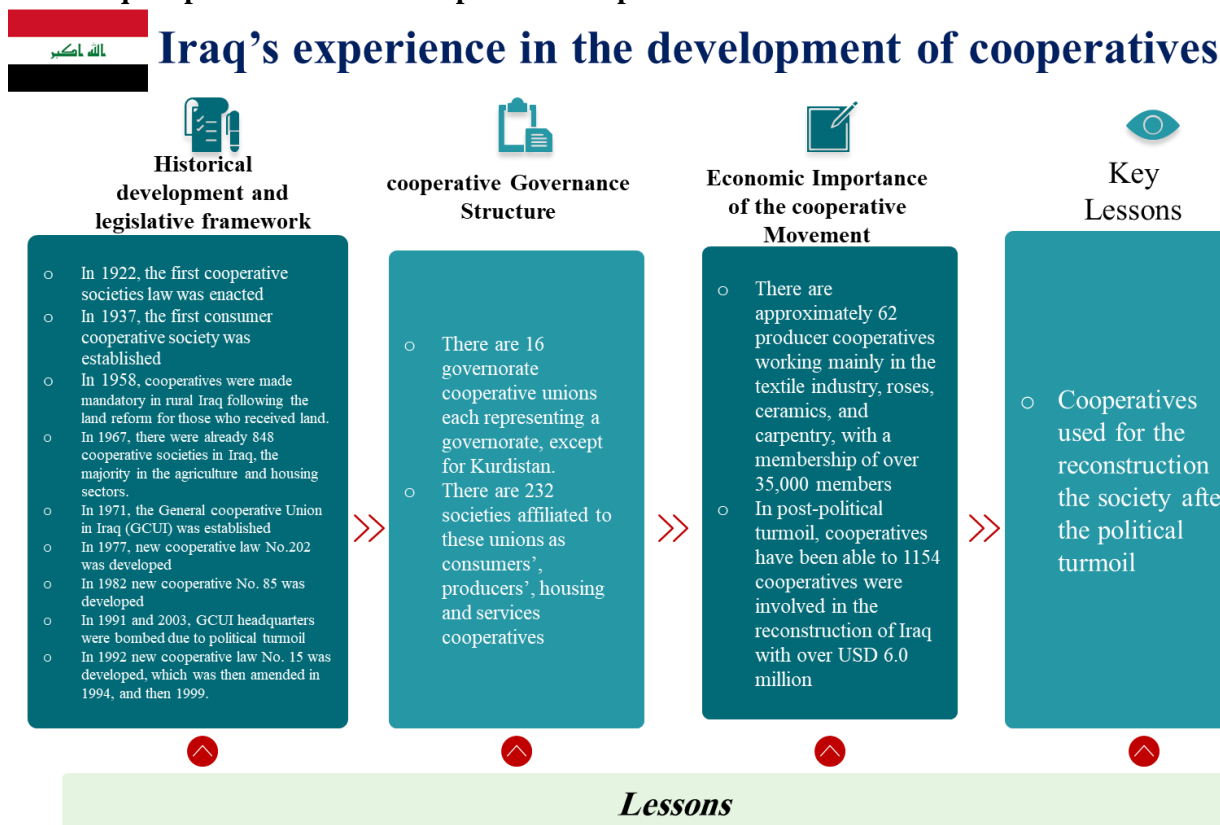
3.1.2 Palestine's experience in the development of cooperatives



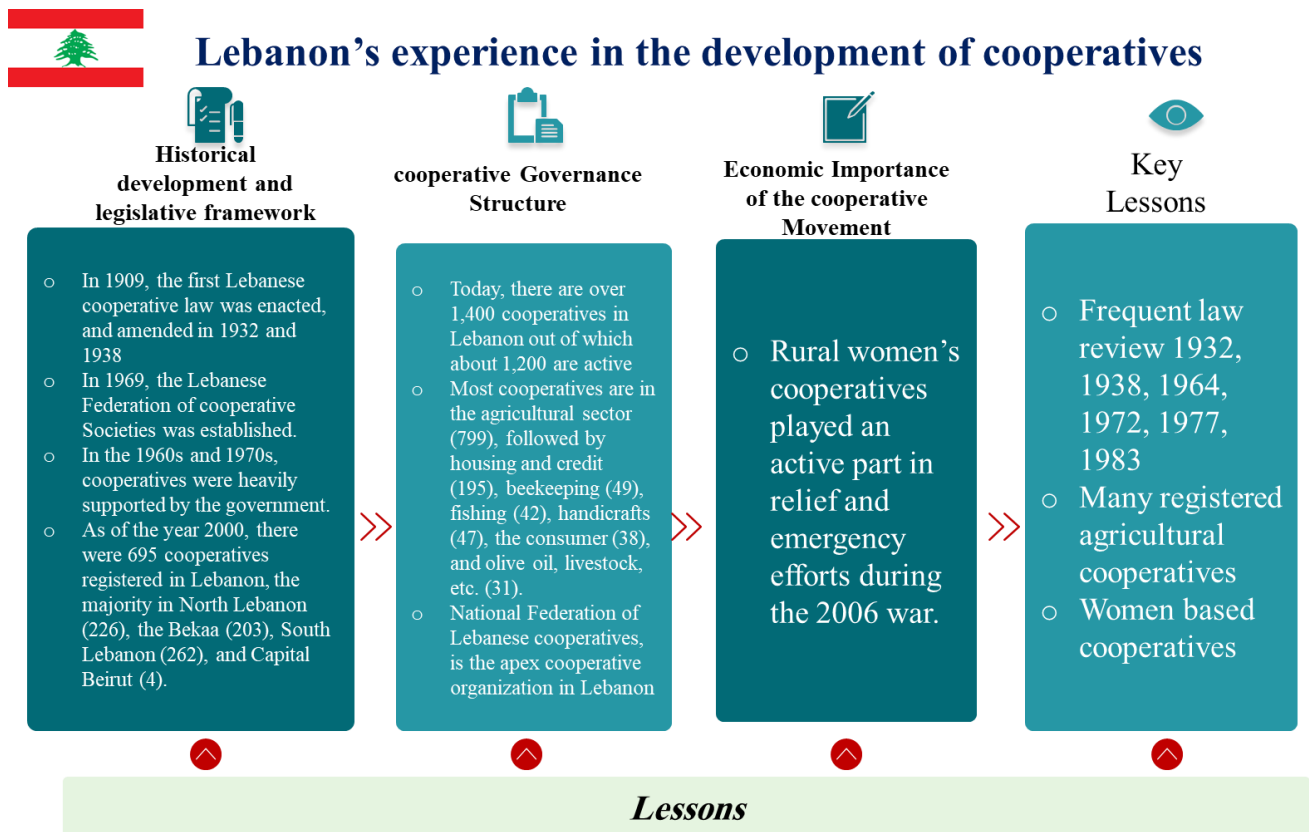
3.1.3 Yemen's experience in the development of cooperatives



3.1.4 Iraq's experience in the development of cooperatives



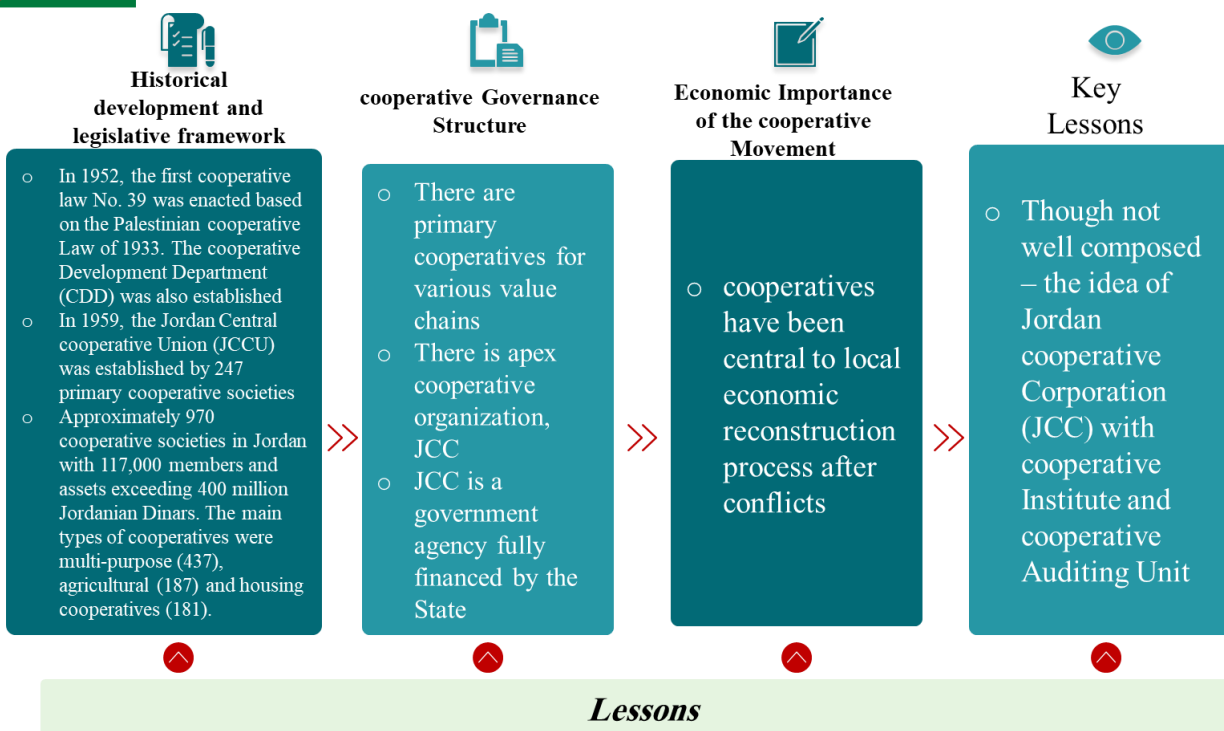
3.1.5 Lebanon's experience in the development of cooperatives



3.1.6 Jordan's experience in the development of cooperatives



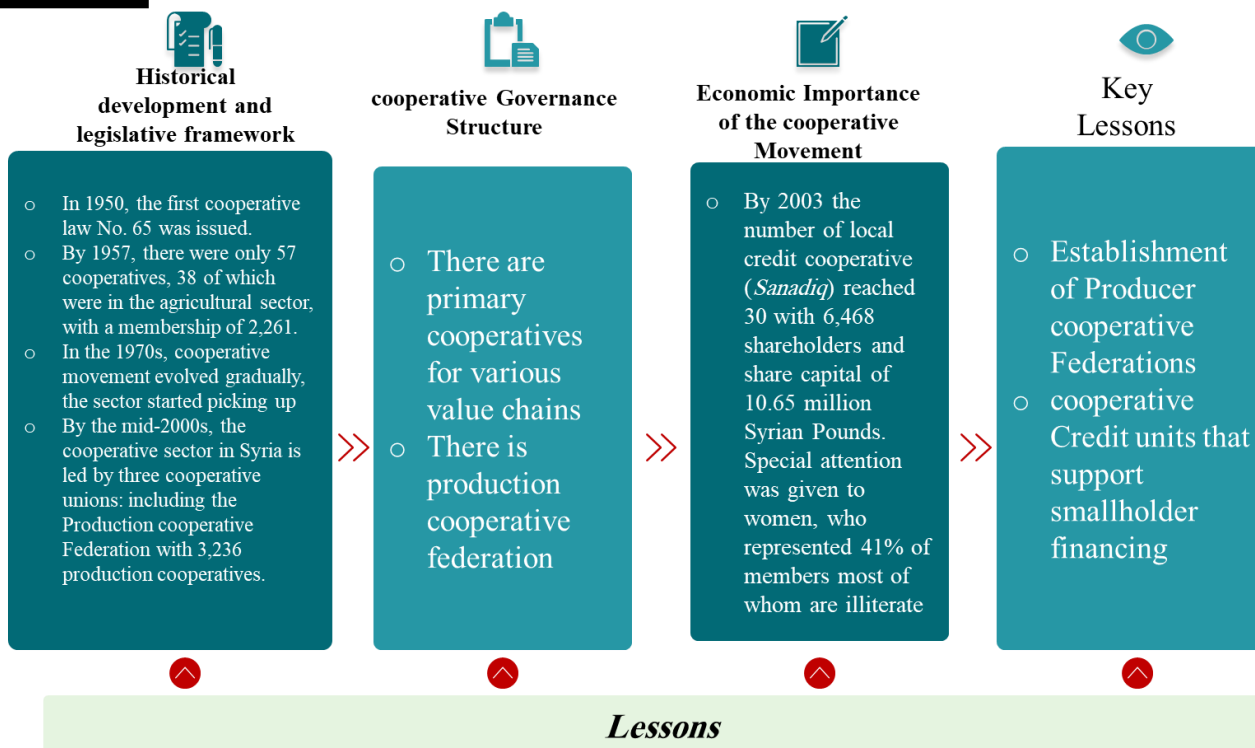
Jordan's experience in the development of cooperatives



3.1.7 Syria's experience in the development of cooperatives



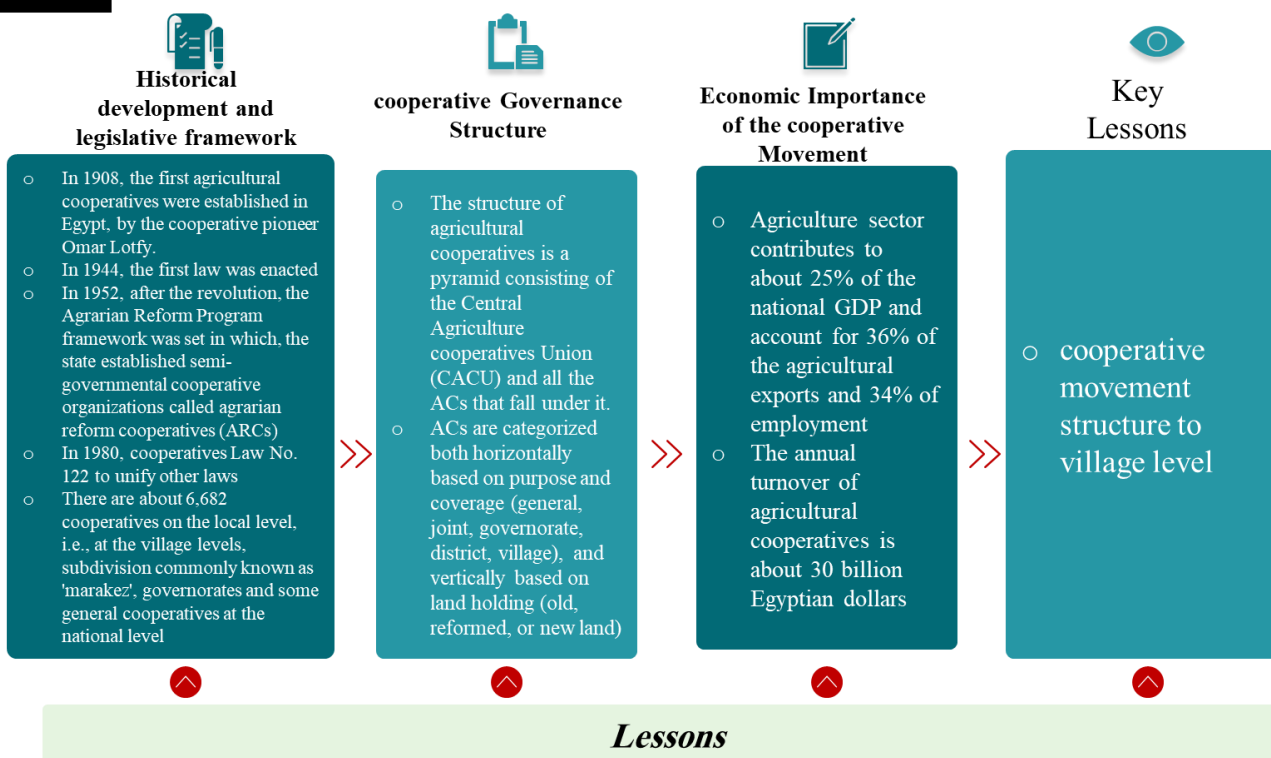
Syria's experience in the development of cooperatives



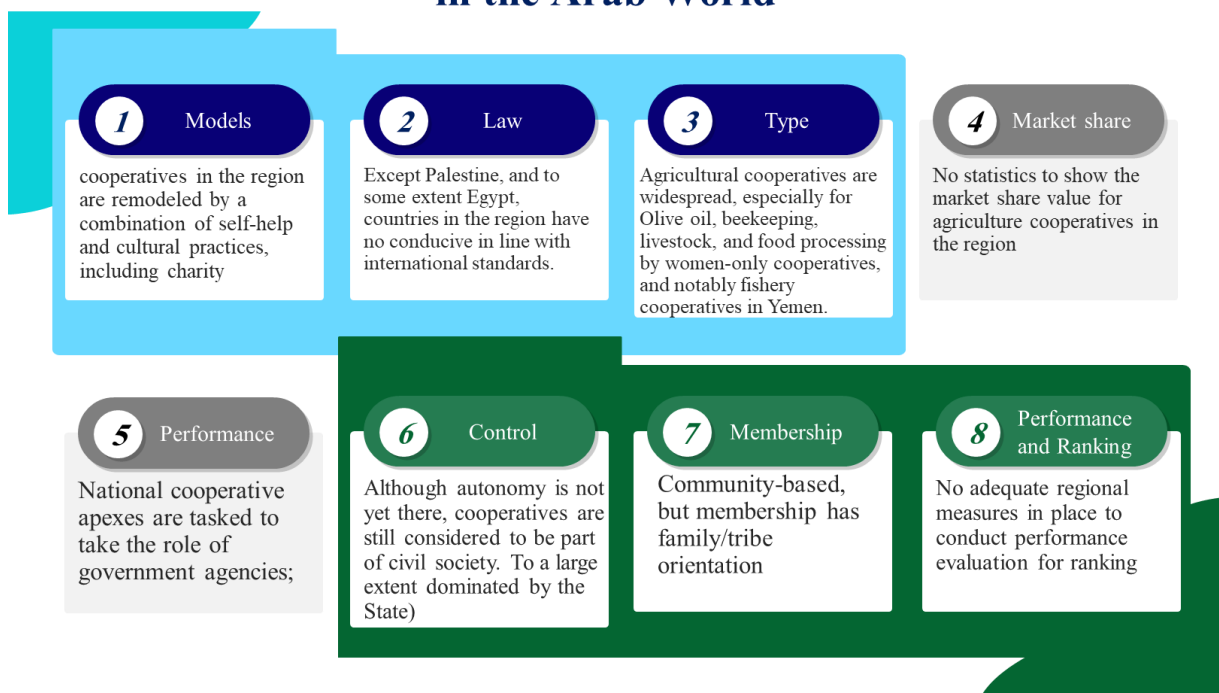
3.1.8 Egypt's experience in the development of cooperatives



Egypt's experience in the development of cooperatives



Common features of agricultural cooperative movements in the Arab World



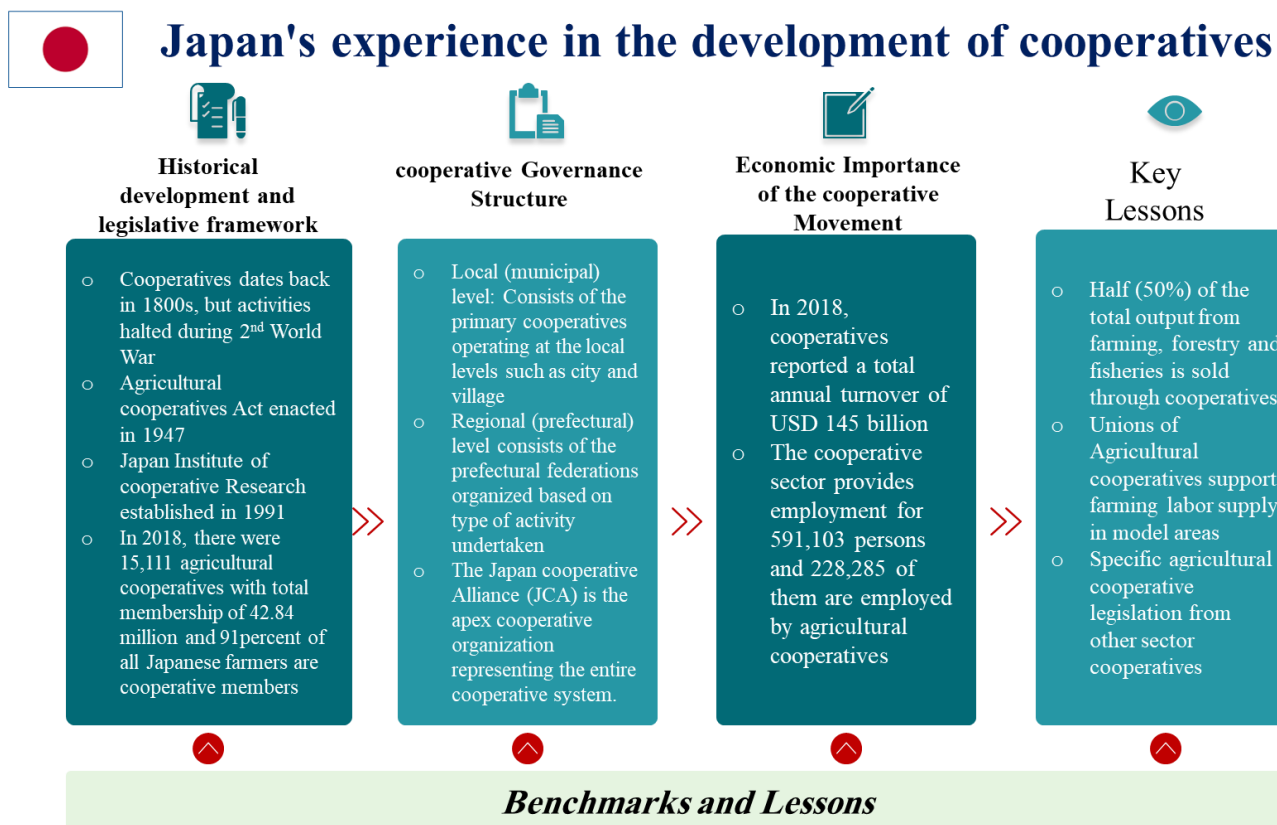
Point 10: Cooperatives in Arab World performing dismally. Their business models do not adequately address the market failures and inclusivity among the smallholders. A major factor is the societal and cultural orientation of the cooperative model –more inclination to cooperate as a social organization than a business organization.

3.2 Cooperatives sector development in the World

In the Arab World, the notion of self-help (cooperative spirit) has been in existence. There have been informal types of self-help help societies. International Labour Organization (ILO) has established that these informal groupings mostly common in local communities have exhibited a combination of 'self-help' and 'charity'. The most common term in the Arabic language used to define organizations such as informal associations and

Below are highlights of the agricultural cooperative movement in specific countries for benchmarking.

3.2.1 Japan's experience in the development of cooperatives



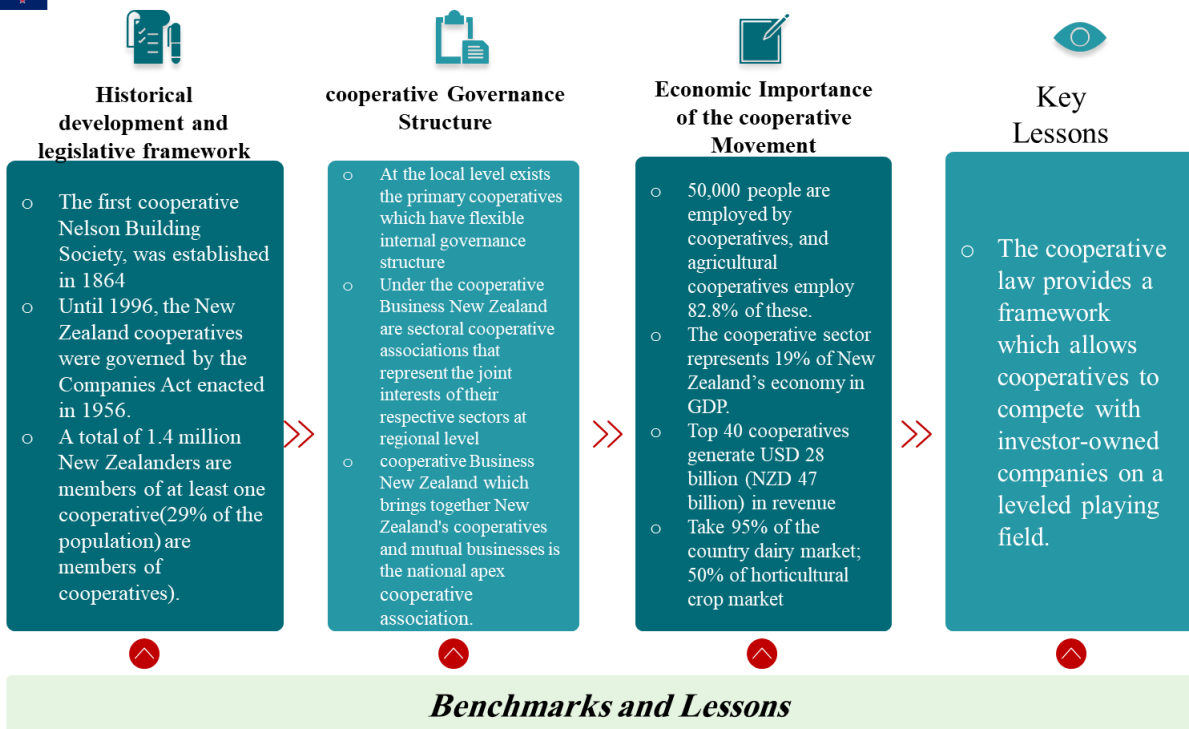
3.2.2 Republic of Korea's experience in the development of cooperatives



3.2.3 New Zealand's experience in the development of cooperatives



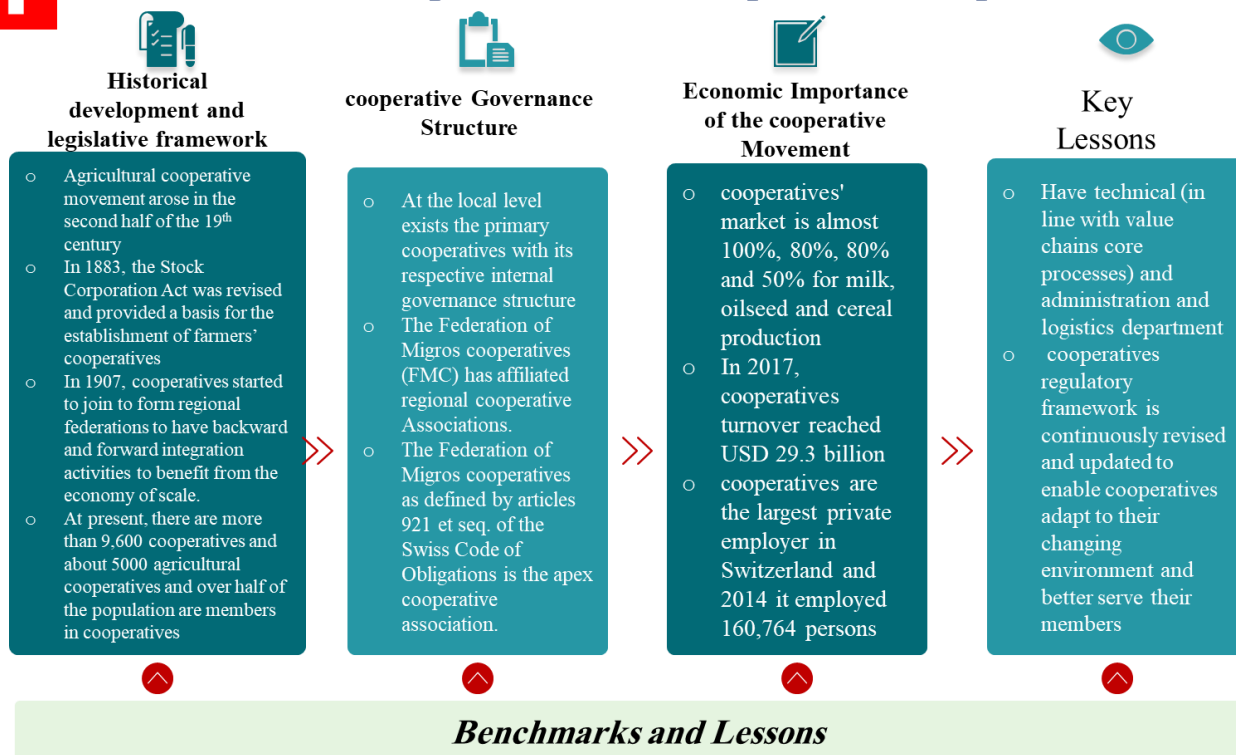
New Zealand's experience in the development of cooperatives



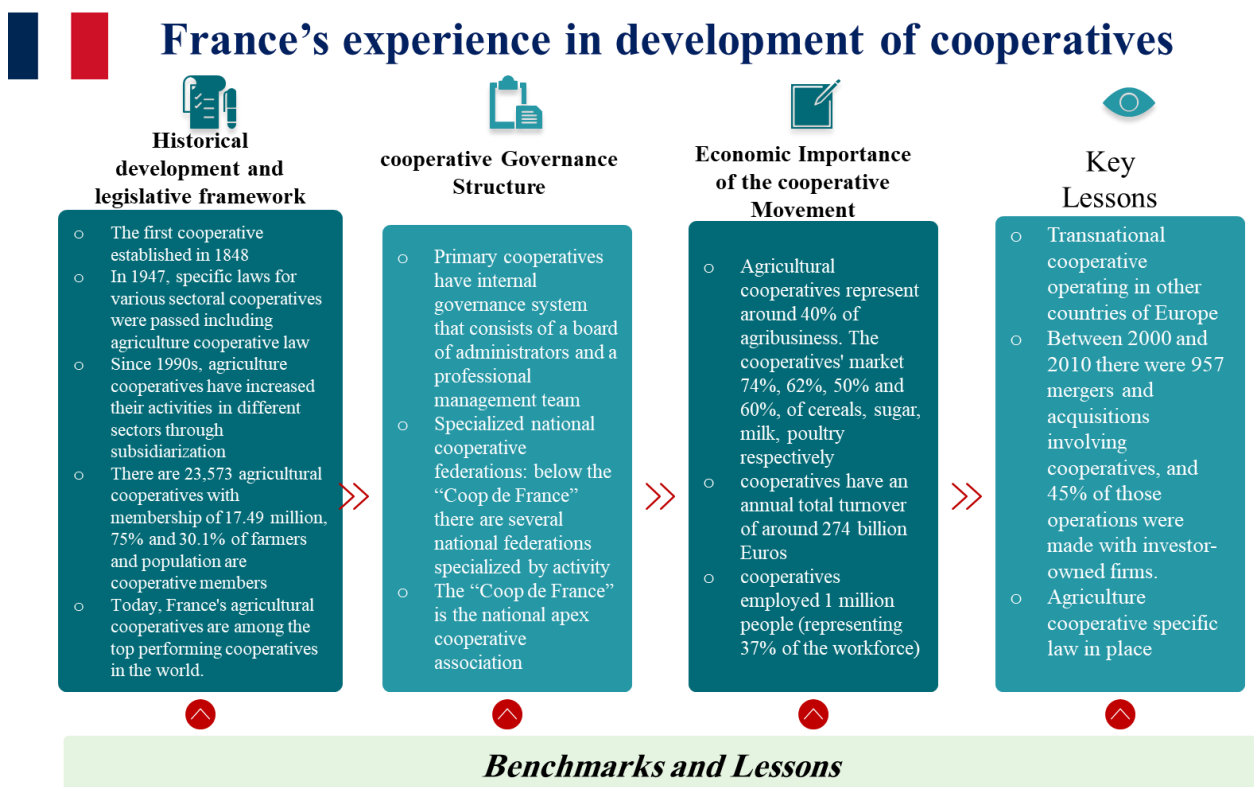
3.2.4 Switzerland's experience in the development of cooperatives



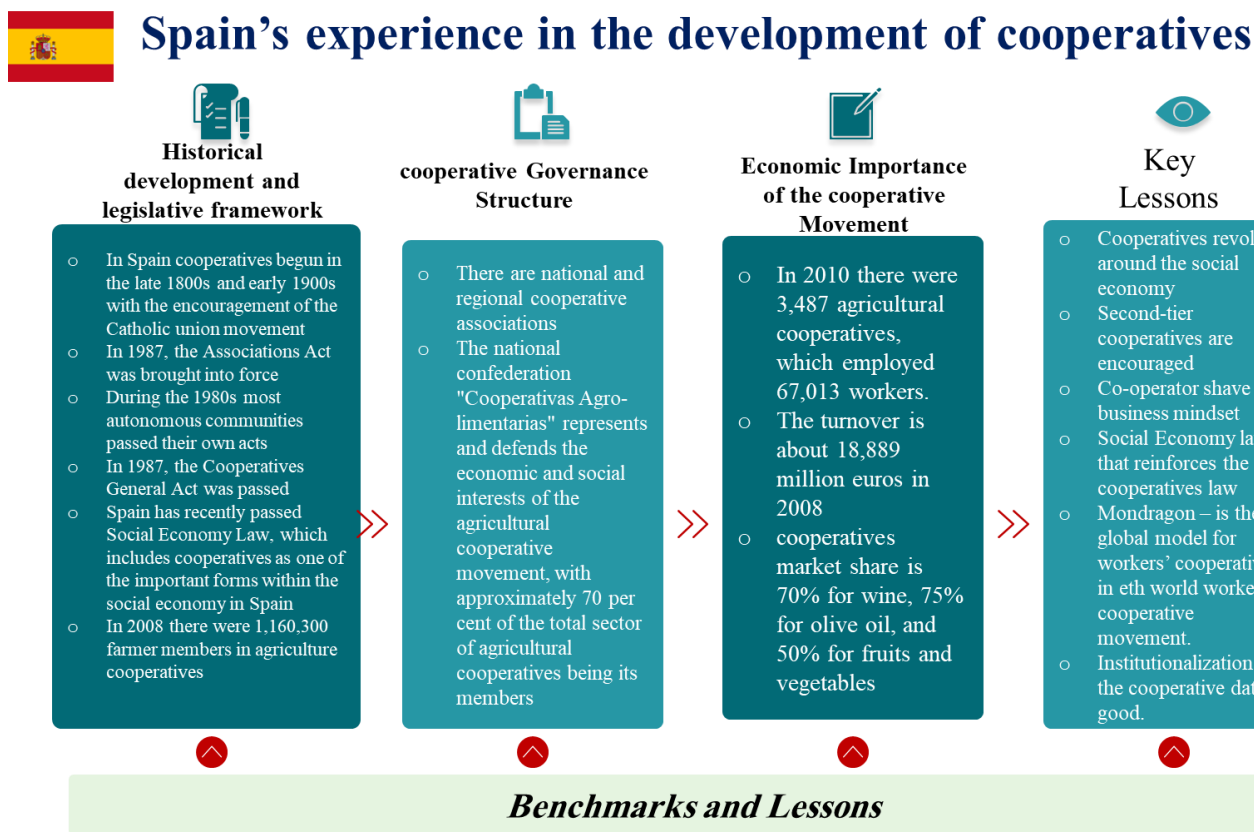
Switzerland's experience in development of cooperatives



3.2.5 France's experience in the development of cooperatives

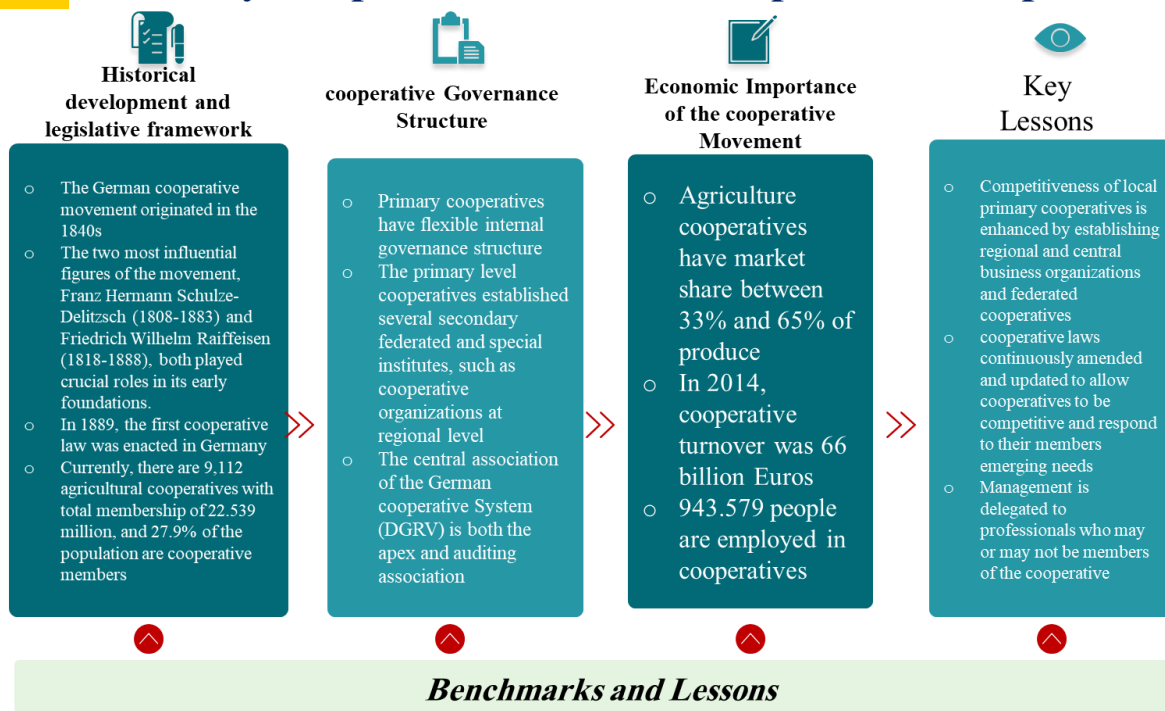


3.2.6 Spain's experience in the development of cooperatives



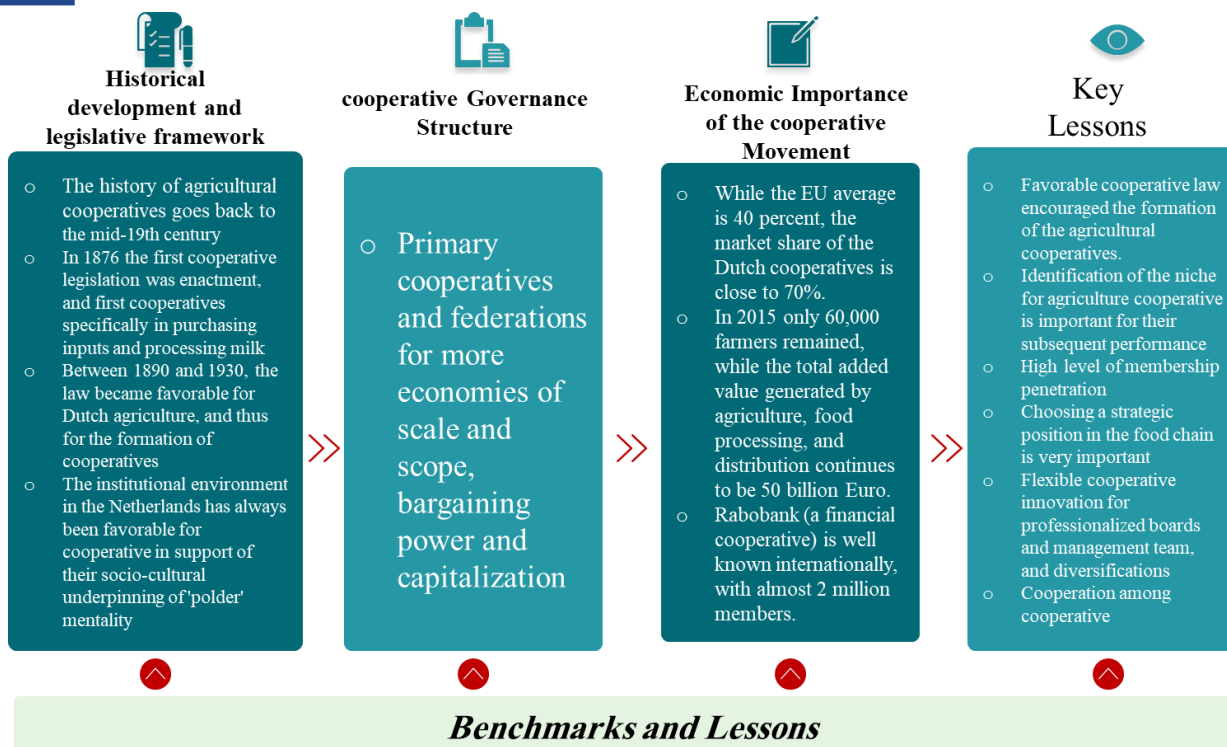
3.2.7 Germany's experience in the development of cooperatives

Germany's experience in the development of cooperatives



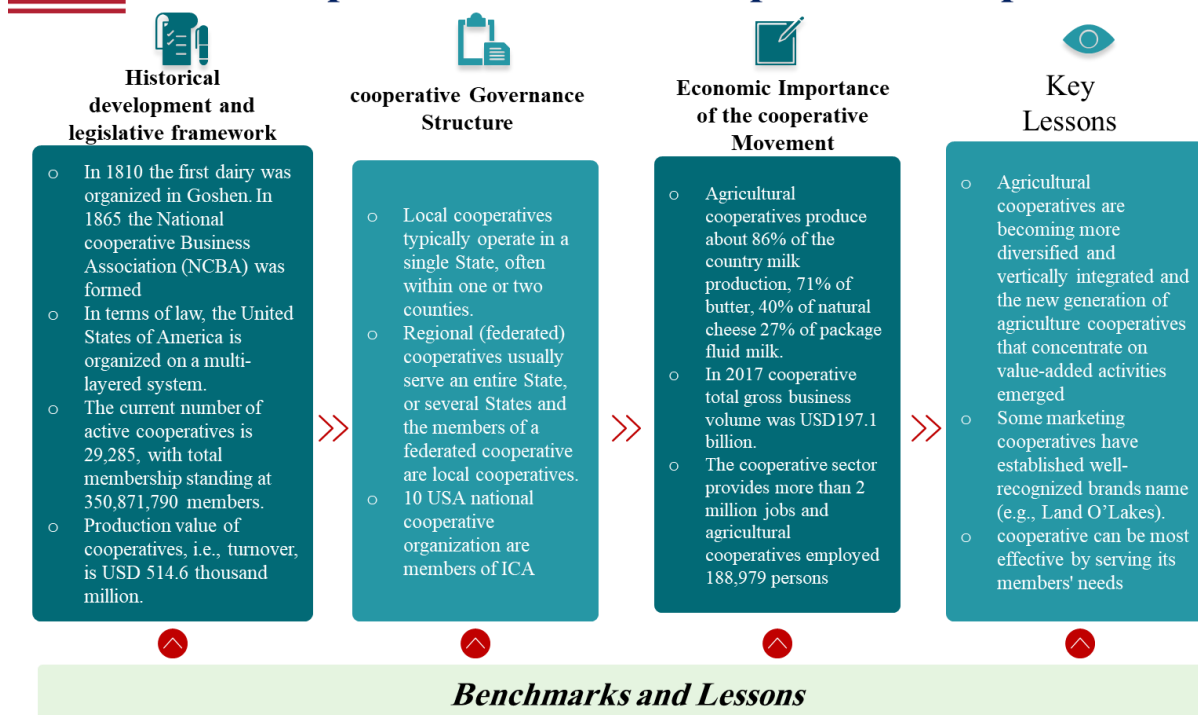
3.2.8 The Netherlands' experience in the development of cooperatives

The Netherlands' experience in the development of cooperatives



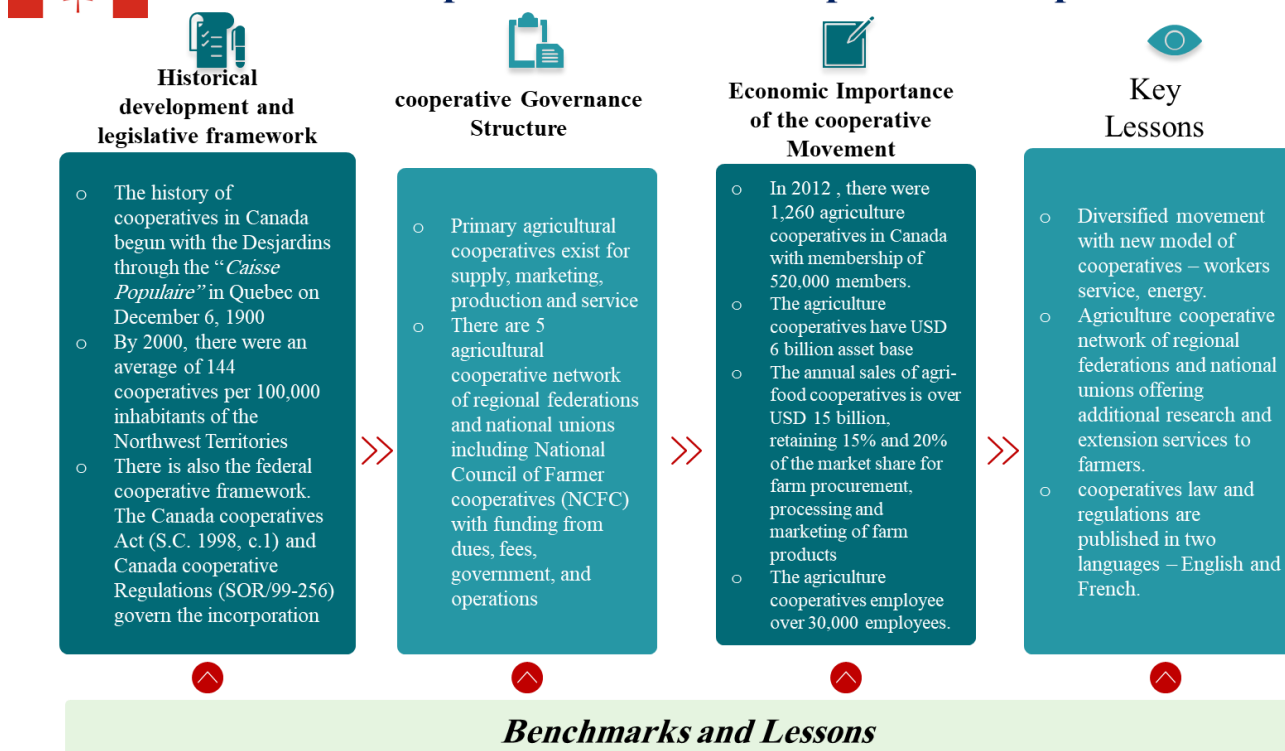
3.2.9 USA's experience in the development of cooperatives

USA's experience in the development of cooperatives

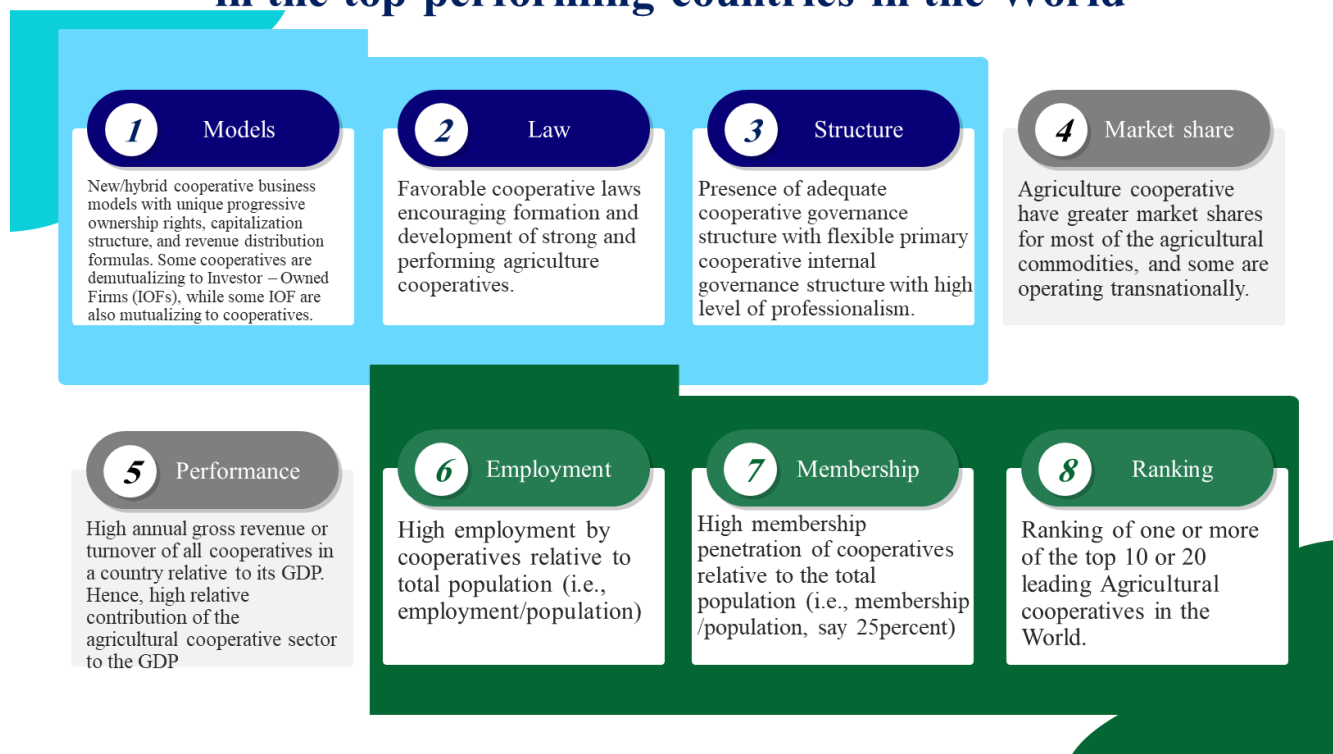


3.2.10 Canada's experience in the development of cooperatives

Canada's experience in the development of cooperatives



Common features of agricultural cooperative movements in the top-performing countries in the World



4. Conclusions and Suggestions

4.1 Conclusions

The cooperatives development Kingdom of Saudi Arabia is relatively young and weak compared to some of its neighbouring countries and other regions of the world – Asia, Ocean, America and Europe.

4.2 Suggestions for Benchmarking the Best Performing Countries in the Cooperatives Sector











The Table below illustrates examples of the best practices and indicators for the development and performances of agricultural cooperatives in the World, for benchmarking purposes.










The key parameters for benchmarking are:

1. Legislation Framework
2. Cooperative business models
3. Membership/ Population
4. Governance Structure and Systems
5. Contribution to Economy
6. Research and Information

The proposed region and countries for benchmarking are:

1. Asia: Japan and South Korea
2. Oceania: New Zealand
3. Europe: France, Spain, Germany, Switzerland, The Netherlands
4. North America: Canada and USA

Benchmarking Indicators for Best Performing Agricultural Cooperatives		Asia		Oceania	Europe					North America	
		 Japan	 South Korea	 New Zealand	 France	 Spain	 Germany	 Switzerland	 The Netherlands	 Canada	 USA
Legislation Framework	High adherence to ICA and ICA standards/Cooperative principles, values and practices	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
	Special laws/policies/strategies for agricultural cooperatives	✓	✓							✓	✓
	Regular reviews of the cooperative-related laws	✓	✓	✓						✓	
Cooperative business models	Diverse entrepreneurial agricultural cooperative models – in ownership, financing, marketing strategy dimensions	✓	✓	✓				✓		✓	✓
Membership/Population Patronage	High Member penetration to rural areas/Patronage of at least 25% population	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
	The high number of established and functional agricultural cooperatives	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
	Women and youth specialized cooperatives and related programs	✓	✓	✓		✓		✓			
Governance Structure and Systems	Apex Co-op body affiliated with ICA	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
	Sectoral and subnational federations/2 nd tier cooperatives	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
	Functional democratic structures	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
	Professionalized	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓

Benchmarking Indicators for Best Performing Agricultural Cooperatives		Asia		Oceania	Europe				North America	
		 Japan	 South Korea	 New Zealand	 France	 Spain	 Germany	 Switzerland	 The Netherlands	 Canada
	management teams									
	Individualized management tools ⁹ and operational policies	✓	✓	✓	✓	✓	✓	✓	✓	✓
Contribution to Economy	High contribution to the food sector and agri-food market dominance	✓	✓	✓	✓	✓		✓	✓	
	High annual financial turnovers (over US\$1B)	✓	✓	✓	✓	✓	✓	✓	✓	✓
	High direct employment contribution	✓	✓	✓	✓	✓	✓	✓	✓	✓
	High contribution to the country's GDP	✓	✓	✓	✓	✓	✓	✓	✓	✓
Research and Information	Collaboration with academia	✓	✓	✓	✓	✓	✓	✓	✓	
	Institutionalized data and training programs	✓	✓	✓	✓	✓	✓	✓	✓	✓
	Highly ranked agricultural cooperatives in the World Cooperative Monitor	✓	✓	✓	✓	✓	✓	✓	✓	✓

⁹ Management Tools include Articles of Association, Bylaws, Marketing Agreements, Membership Application Forms etc

Considering the above and based on the assessment of the cooperative sector and level of development cooperative business modelling and governance structure should be given a high priority.

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