

Industrial relations and social dialogue

Representativeness of the European social partner organisations: Food and drink sector



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Authors: Ingel Kadarik (Praxis) and Peter Kerckhofs (Eurofound)

Research managers: Peter Kerckhofs

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European Foundation for the Improvement of Living and Working Conditions

Telephone: (+353 1) 204 31 00

Email: information@eurofound.europa.eu

Web: www.eurofound.europa.eu

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Country codes EU27

AT	Austria	ES	Spain	LV	Latvia
BE	Belgium	FI	Finland	MT	Malta
BG	Bulgaria	FR	France	NL	Netherlands
CY	Cyprus	HR	Croatia	PL	Poland
CZ	Czechia	HU	Hungary	PT	Portugal
DE	Germany	IE	Ireland	RO	Romania
DK	Denmark	IT	Italy	SE	Sweden
EE	Estonia	LT	Lithuania	SI	Slovenia
EL	Greece	LU	Luxembourg	SK	Slovakia

Introduction

The aim of this representativeness study is to identify the relevant national and supranational social partners – that is, the trade unions and employer organisations – in the food and drink sector and to show how they relate to the sector’s European-level organisations representing employees and employers.

The report is divided into three parts: an overview of the economic specificities of and the employment trends in the food and drink sector; an analysis of the social partner organisations in the 27 EU Member States;¹ and an analysis of the relevant European organisations, in particular their membership composition and capacity to negotiate.

This section presents the objectives of the study along with a brief introduction to the chosen methodology. The context of this study is the European sectoral social dialogue committee (ESSDC) for the food and drink sector, which was established in its current form in 2012.

0.1. Objectives of the study

Representativeness studies are conducted for four reasons.

- The European Commission aims to confirm the representativeness of the social partner associations consulted under Article 154 of the Treaty on the Functioning of the European Union (TFEU).
- Representativeness is one eligibility criterion for setting up or participating in an ESSDC.
- Representativeness also means having the capacity to negotiate agreements that can be implemented by Council decision, as provided for by Article 155 of the TFEU.
- This study can also offer guidance for future capacity-building initiatives.

Representativeness is defined by the European Commission decision of 20 May 1998 on the establishment of sectoral social dialogue committees promoting the dialogue between the social partners at European level (Decision 98/500/EC). For an organisation to be recognised as a representative EU social partner organisation, it must:

- relate to specific sectors or categories and be organised at European level
- represent organisations that are themselves an integral and recognised part of Member States’ social partner structures, that have the capacity to negotiate labour agreements and that are representative of several Member States
- have adequate structures to ensure its effective participation in the work of an ESSDC

To accomplish its aims, this study first identifies the relevant national social partner organisations in the food and drink sector before analysing the structure of the sector’s relevant European organisations, in particular their membership composition. This analysis involves clarifying the unit of analysis at both national and European levels. The study includes only organisations whose membership domain is classed as ‘sector-related’ (see Section 0.3 for further information).

¹ This research was planned prior to the withdrawal of the United Kingdom (UK) from the European Union on 31 January 2020 and therefore includes data relating to the 27 current EU Member States and the UK. However, UK data were not included in the assessment of the social partners’ representativeness.

0.2. Background on the food and drink ESSDC

The food and drink ESSDC was established in 2012; therefore, it is one of the more recently formed committees. The origins of the food and drink ESSDC lie in the High Level Group on the Competitiveness of the Agro-Food Industry, which was established by Commission Decision 2008/359/EC of 28 April 2008. The report produced by the group in 2009 recommended setting up an ESSDC for the food and drink sector (recommendations 17 and 18), based on the example of the existing ESSDC for the sugar sector (High Level Group on the Competitiveness of the Agro-Food Industry, 2009).

According to recommendation 17, the group had identified a lack of qualified employees as one of the major obstacles to the competitiveness of the sector. A well-functioning social dialogue at all levels was put forward as a means to make the sector more attractive. Recommendation 18 states:

The High Level Group members recommend the European sectoral social dialogue as a tool of good governance. Upon joint request of the European social partners, the European Commission could examine their representativeness with a view to assess the feasibility of creating a Social dialogue committee in the agro-food industry.

In 2012, the European Federation of Food, Agriculture and Tourism Trade Unions (EFFAT), representing the trade unions, and FoodDrinkEurope, representing the employer organisations, signed a first **joint agreement on setting up an ESSDC** for the European food and drink industry under the auspices of the European Commission. Since its establishment, this ESSDC has worked primarily on two key issues: (1) political developments and the regulatory environment affecting the food and drink sector in Europe, and (2) sustainable employment challenges, particularly the qualifications and training needs of the sector.

With EFFAT and FoodDrinkEurope having been recognised as European social partner organisations for the food and drink sector, they were also both included in the list of organisations to be consulted by the European Commission under Article 154 of the TFEU.

In the first 10 years of the ESSDC's existence, EFFAT and FoodDrinkEurope agreed on 13 joint texts, listed in Table 1. Over the years, the issue of the lack of qualified workers remained one of the main obstacles that needed to be overcome to make the sector more competitive on a European and global scale. This issue has been or is due to be further investigated through several EU-funded projects. A first project addressed sustainable employment and competitiveness in the food and drink sector. The second project resulted in a good practice toolbox aiming to help companies to bring in new talent, manage an ageing workforce, identify bottlenecks in recruiting new and skilled employees, and address potential challenges arising from an ageing workforce. A third project aimed to identify new technologies in the food and drink industry, emerging jobs and the new skills and types of qualification required, and to undertake a forward-looking reflection on what criteria will underpin the socially successful adaptation of Food Industry 4.0. Building upon the last two skills-oriented projects, a new project is due to be launched in 2022.

Another activity of political relevance, which also has implications for social dialogue at sector and company levels, is the EU Code of Conduct on Responsible Food Business and Marketing Practices.

Table 1: Texts agreed in the ESSDC for the food and drink sector

Date	Title	Type	Addressee	European trade union organisation signing the text	European employer organisation signing the text
22 March 2022	<i>Joint statement: agri-food employers and workers on the war in Ukraine</i>	Joint statement	European Commission	EFFAT	FoodDrinkEurope, Geopa-Copa
15 December 2020	<i>Only healthy workers can feed Europe (joint statement on vaccine strategies)</i>	Joint statement	EU Member States	EFFAT	FoodDrinkEurope, Geopa-Copa
12 May 2020	<i>Urgent support needed for hospitality-tourism sector in COVID-19 crisis</i>	Joint opinion	EU institutions	EFFAT	FoodDrinkEurope, Hotrec, FoodServiceEurope
9 April 2020	<i>Guidelines to protect the health and safety of workers in food businesses during the COVID-19 pandemic</i>	Guidelines	National organisations	EFFAT	FoodDrinkEurope
25 March 2020	<i>Food and drink trade unions and industry call for worker support</i>	Joint opinion	European institutions/ national authorities	EFFAT	FoodDrinkEurope
17 March 2020	<i>New professions and career paths in the food and drinks industry</i>	Final report from a joint project	Affiliates of EFFAT and FoodDrinkEurope	EFFAT	FoodDrinkEurope
12 June 2017	<i>FoodDrinkEurope–EFFAT joint statement on the CAP</i>	Joint opinion	European institutions/ national authorities	EFFAT	FoodDrinkEurope
30 June 2016	<i>Toolbox: good practices and tools from the food and drink industry in Europe</i>	Tool	Companies	EFFAT	FoodDrinkEurope
27 November 2015	<i>Social partners call for ambitious agreement on climate change to support social change</i>	Joint opinion	European institutions/ national authorities	EFFAT	FoodDrinkEurope

Date	Title	Type	Addressee	European trade union organisation signing the text	European employer organisation signing the text
1 February 2015	<i>Joint position on the proposed revised directive on the activities and supervision of institutions for occupational retirement provision</i>	Joint opinion	European institutions/ national authorities	EFFAT	FoodDrinkEurope
1 October 2014	<i>The food and drink industry apprenticeships pledge</i>	Declaration	European social partners	EFFAT	FoodDrinkEurope
1 March 2014	<i>Joint FoodDrinkEurope–EFFAT position on industrial policy</i>	Joint opinion	European institutions/ national authorities	EFFAT	FoodDrinkEurope
26 July 2013	<i>Joint statement on the CAP reform</i>	Joint opinion	European institutions/ national authorities	EFFAT	FoodDrinkEurope

Source: Compiled by the authors based on the European Commission's social dialogue texts database, 2021

0.3. Definitions and methodology

The methodology applied is linked to the criteria identified in Commission Decision 98/500/EC: sector-relatedness, membership and organisational capacity. These criteria will be defined successively in this section.

Sector-relatedness

Sector-relatedness refers to the demarcation of the food and drink sector in agreement with the social partners and the European Commission.

When analysing the way trade unions and employer organisations relate to the sector, this must include the extent to which their membership domains cover all types of workers in all types of companies in all types of activities in the sector. How the sector is defined is crucial for the assessment of sector-relatedness.

In this study, the food and drink sector is understood as covering NACE² codes 10.1–10.9 and 11.01–11.07 (Table 2).

² NACE refers to the European statistical classification of economic activities in the European Community. NACE revision 2 codes are used here. For the demarcation of a specific sector, reference is made to a number of NACE codes.

Table 2: Demarcation of the food and drink sector based on NACE codes

NACE code	Corresponding economic activity
10	Manufacture of food products
10.1	Processing and preserving of meat and production of meat products
10.2	Processing and preserving of fish, crustaceans and molluscs
10.3	Processing and preserving of fruit and vegetables
10.4	Manufacture of vegetable and animal oils and fats
10.5	Manufacture of dairy products
10.6	Manufacture of grain mill products, starches and starch products
10.7	Manufacture of bakery and farinaceous products
10.8	Manufacture of other food products
10.9	Manufacture of prepared animal feeds
11	Manufacture of beverages
11.01	Distilling, rectifying and blending of spirits
11.02	Manufacture of wine from grape
11.03	Manufacture of cider and other fruit wines
11.04	Manufacture of other non-distilled fermented beverages
11.05	Manufacture of beer
11.06	Manufacture of malt
11.07	Manufacture of soft drinks; production of mineral waters and other bottled waters

Source: NACE revision 2

Table 3 and Figure 1 show the membership domain patterns that can exist. The membership domains of trade unions and employer organisations can be exactly in line with the demarcation of the sector (i.e. covering all activities in NACE codes 10.1–10.9 and 11.01–11.07); this type of sector-relatedness is called ‘congruence’. If the membership domain of an organisation goes beyond the food and drink sector as defined here, it is categorised as ‘overlapping’. ‘Sectionalism’ is a type of sector-relatedness whereby an organisation covers part of the sector and nothing else, whereas organisations that fall into the category of ‘sectional overlap’ cover part of the sector and also have members in other sectors.

Table 3: Membership domain patterns of organisations

Domain pattern	Domain of organisation within the sector	Domain of organisation outside the sector
	Does the domain of the trade union/employer organisation cover potentially all employees/companies in the sector?	Does the trade union/employer organisation also potentially represent employees/companies outside the sector?
Congruence	Yes	No
Overlap		Yes
Sectionalism	No	No
Sectional overlap		Yes

Source: Eurofound

Figure 1: Four types of sector-relatedness



Source: Eurofound

The multisectoralism of the associations organising workers and employers in the food and drink sector will also be analysed, in Section 2.8. This analysis will illustrate the proportion of national trade unions and employer organisations that are also represented in other sectors with ESSDCs. If such multisectoralism entails shared interests in certain topics, this may suggest that future cooperation across different ESSDCs would be of value.

Membership

Membership is another important aspect of representativeness. This study looks at two levels of membership: first, the geographical coverage of the EU-level organisations (for instance, how many Member States an EU-level trade union/employer organisation has affiliates in) and, second, the organisational density (that is, the number of members who are employees as a percentage of the total number of employees in a given industry or country) of the national affiliates. Important aspects to be assessed are whether the EU-level players organise most, or at least the most significant,

national-level players (significant in relation to their membership strength in the sector and their involvement in collective bargaining) and whether there are any major gaps in their membership domains.

Membership of a social partner organisation requires payment of membership fees. However, some organisations are reluctant to inform third parties about such payments. Considering the limits of transparency, this study does not always distinguish between different membership statuses. Where possible, indirect membership (i.e. membership through another organisation to which the employer organisation or trade union is affiliated) is taken into account in this report.

Organisational capacity

The organisational capacity of the European social partners is analysed in terms of their ability to commit themselves on behalf of their members and to conclude binding agreements or actions that can be implemented or monitored EU-wide through the support of their affiliates. To assess their capacity to negotiate, the **actors** and their objectives and decision-making structures provided for in their statutes are considered, as are the **outcomes** in terms of texts agreed. The **processes** through which the organisations obtained mandates, support and approval from their member organisations in the negotiation process are also considered.

The **involvement of social partners' members in national-level collective bargaining** is also important, as it shows that they are able to obtain a mandate to negotiate on behalf of their members (at least at national level, which could then also translate into a mandate to negotiate at EU level). Such a mandate, whether implicit or explicit, allows for negotiations to take place at European level that could potentially result in binding agreements or the drafting of European autonomous agreements (requiring implementation by social partners at national level in line with their respective practices and traditions). The capacity to act autonomously in this way among those represented on the ESSDC contributes significantly to the committee's effectiveness.

The involvement in collective bargaining of national sector-related trade unions and employer organisations is also a factor that distinguishes them from professional associations and business associations, which only defend their members' interests through unilateral lobbying activities and do not involve themselves in negotiations on working conditions through collective bargaining or social dialogue. Trade unions and employer organisations that do engage in collective bargaining on behalf of their members have a proven capacity to obtain a mandate from their members to negotiate and to reach compromises and agreements with organisations representing different interests. In its analysis, this report aims to distinguish between these different types of organisations.

Finally, representativeness also depends upon the organisations' structures and resources, their capacity to encourage the active participation of their members and combine the different interests of member organisations, and their potential to act autonomously at European level. **Effective participation in the ESSDC** is assessed in terms of presence at the meetings in 2018 and 2019.

0.4. Data collection and quality control measures

Data collection

Representativeness studies combine top-down and bottom-up approaches. The top-down approach includes all sector-related affiliates of EFFAT and FoodDrinkEurope, while the bottom-up approach

looks at the organisations organising employees or employers and/or involved in sector-related collective bargaining and social dialogue in the EU Member States and their membership of European-level organisations.

Except where otherwise stated, this study draws on the country-level studies provided by the Network of Eurofound Correspondents. So that questions were not left blank, estimates were used where precise quantitative data could not be obtained. Thus, quantitative data (such as those used to calculate density rates) may stem from any of the following sources:

- official statistics and representative survey studies
- administrative data, such as membership figures provided by the organisations
- estimates, expert opinions and assessments from the Network of Eurofound Correspondents or representatives of the organisations

Other sources used in this report include the European Commission's social dialogue texts database and the articles of association of the EU-level organisations.

Quality assurance

To ensure the quality of the information gathered, several verification procedures and feedback loops were included in the process of preparing this study.

First, combining the top-down and bottom-up approaches, information on the affiliates of the relevant EU-level social partners and other sector-related associations was collected from the reports prepared by the Network of Eurofound Correspondents, between May 2020 and September 2020. Subsequently, the authors of this report (including the Eurofound research manager responsible) checked the consistency of the national contributions and, where necessary, asked the national correspondents to revise them between December 2020 and February 2021. Based on these collected data, an overview report was drafted by the authors between March 2021 and October 2021. As a result of other work on representativeness studies for other sectors, some delays in the planned work occurred in the second half of 2021.

A first, informal (pre-evaluation) consultation of EFFAT and FoodDrinkEurope was carried out in March 2022. Using the comments of the Commission, EFFAT and FoodDrinkEurope as guidance, the draft report was finalised and prepared for formal evaluation by the Eurofound Advisory Committee on Industrial Relations, the European-level sectoral social partners identified in the report and the Directorate-General for Employment, Social Affairs and Inclusion. This formal evaluation was conducted through a written evaluation procedure that took place between 10 June and 15 July 2022. Following this evaluation, final corrections were made and the report edited (language editing, checking for consistency and formatting), after which the study was published on the Eurofound website.

During this process, all relevant actors and organisations mentioned in the report were invited to check the consistency of the information included in it, thereby ensuring that the bottom-up approach included all the relevant sector-related organisations from each country. As different social partner organisations were able to view the information reported by other organisations in the same country and, if necessary, comment on the credibility or accuracy of the information on other organisations representing a similar membership, this process involved an element of mutual control and recognition.

These quality assurance measures and the evaluation and approval of the report by the Eurofound Advisory Committee on Industrial Relations – which consists of representatives of both sides of industry, governments and the European Commission – as well as the evaluation and approval of it by the European-level sectoral social partners identified in the report, ensure the legitimacy of the findings of this study.

0.5. Structure of the report

As stated earlier in the introduction, the report consists of three main parts. It begins with a brief summary of the economic background and employment specificities of the food and drink sector. It then analyses the relevant social partner organisations in the 27 EU Member States. The third part considers the representative associations at European level.

Finally, it is important to note the difference between the research and political aspects of this study. While providing data on the representativeness of the organisations under consideration, the report does not conclude on whether the representativeness of the European social partner organisations and their national affiliates is sufficient for participation in the European social dialogue. Rather, the information and analyses in this report provide the evidence base for further efforts and decisions of the social partners themselves and the European Commission.

1. Economic background and employment trends in the sector

This chapter describes the economic background of the food and drink industry in terms of employment and company structures. It outlines the scope of the workforce and the companies in the sector that are to be represented by the trade unions and employer organisations discussed in the following chapter.

1.1. Employment in the food and drink sector

Data from 2019 show that the food and drink sector in the EU27 employs 4.7 million people, accounting for around 2.4% of the total EU27 workforce. In 2021, this number was 4.5 million.³

Table 4 gives an overview of the number of people employed in the food and drink sector per country and the percentage of sector employment as a share of the total employment in each country and as a share of the EU sector employment. In absolute numbers, the Member States with the largest sectoral workforces are Germany (786,000 people), France (632,500), Poland (486,100), Italy (459,600) and Spain (456,100). The workforce of each of those five countries accounts for more than 10% of the EU27 sectoral workforce; together, these workforces account for 65% of the total EU27 sectoral workforce.

As a share of the country's total employment, the food and drink sector is most important – in comparison with other countries – in Croatia (4% of the total employment), Greece (3.4%), Bulgaria (3.3%), Hungary (3.2%) and Poland (3.1%). In other countries, the share of the sectoral workforce is below 3%. The EU27 average share of the country's workforce for this sector is 2.4%; the share is 2.4% or higher in 14 countries (shaded green in Table 4). The sector is least important, compared with other countries, in Sweden and Luxembourg, where the shares of the sector workforce of the total workforce are 1.0% and 0.9%.

Table 4: Employment in the food and drink sector, 2019

Member State	People employed in food subsector	People employed in drink subsector	People employed in food and drink overall	Share of country's total employment (%)	Share of EU27 total sectoral employment (%)
DE	786,000	76,600	862,600	2.0	18.3
FR	632,500	46,600	679,100	2.5	14.4
ES	456,100	64,500	520,600	2.6	11.1
PL	486,100	27,700	513,800	3.1	10.9
IT	459,600	44,500	504,100	2.2	10.7
RO	205,700	16,100	221,800	2.6	4.7
HU	124,600	18,900	143,500	3.2	3.1
EL	120,000	12,600	132,600	3.4	2.8
NL	121,600	8,800	130,400	1.5	2.8
CZ	108,700	17,200	125,900	2.4	2.7
PT	102,000	16,400	118,400	2.4	2.5
BE	105,300	11,900	117,200	2.4	2.5
BG	90,500	16,700	107,200	3.3	2.3

³ FoodDrinkEurope, 2021.

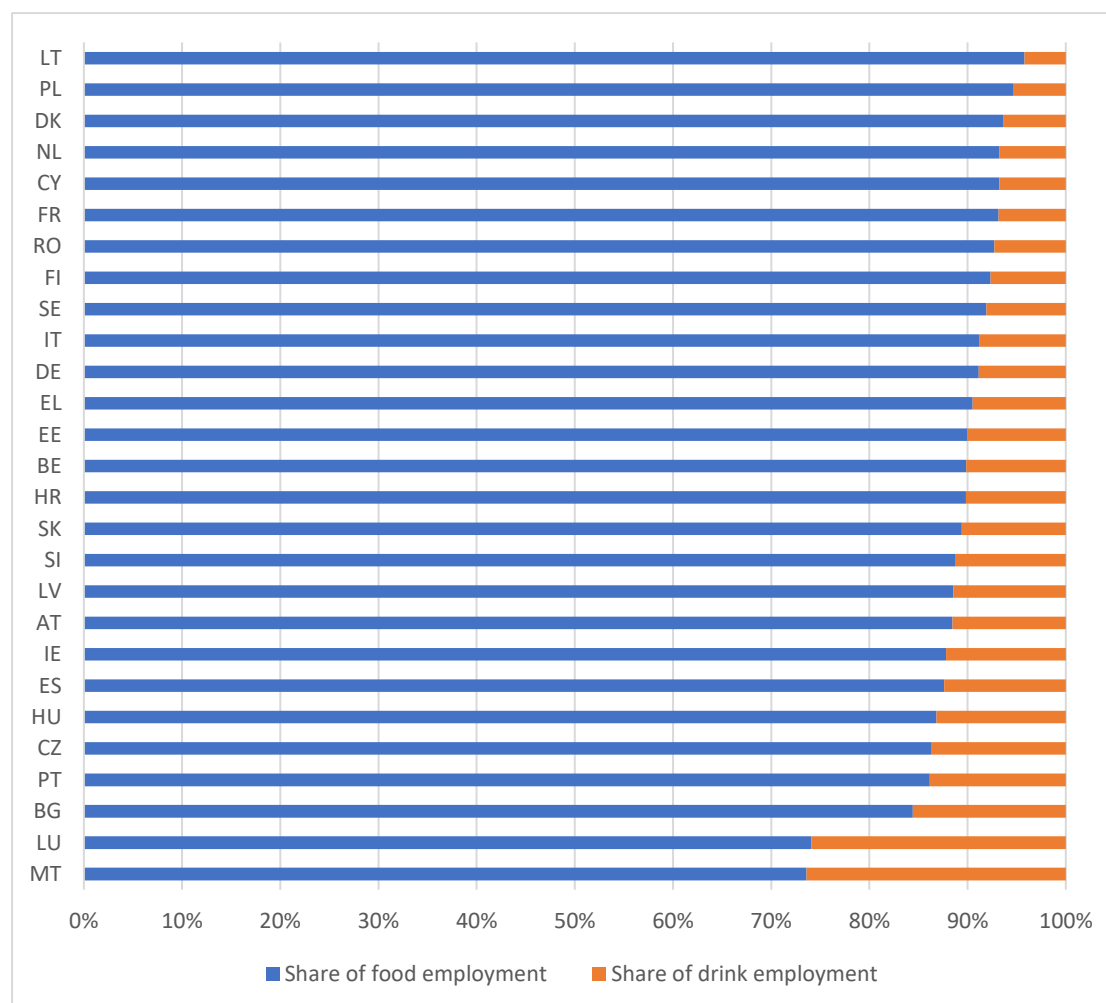
Member State	People employed in food subsector	People employed in drink subsector	People employed in food and drink overall	Share of country's total employment (%)	Share of EU27 total sectoral employment (%)
AT	72,800	9,500	82,300	1.9	1.8
HR	60,100	6,800	66,900	4.0	1.4
DK	54,200	3,700	57,900	2.0	1.2
SK	50,700	6,000	56,700	2.2	1.2
IE	48,900	6,800	55,700	2.4	1.2
SE	45,400	4,000	49,400	1.0	1.1
LT	38,700	1,700	40,400	2.9	0.9
FI	34,900	2,900	37,800	1.5	0.8
LV	20,100	2,600	22,700	2.5	0.5
SI	19,800	2,500	22,300	2.3	0.5
EE	13,500	1,500	15,000	2.2	0.3
CY	9,600	700	10,300	2.5	0.2
MT	3,900	1,400	5,300	2.1	0.1
LU	2,000	700	2,700	0.9	0.1
EU27	4,273,300	429,300	4,702,600	2.4	100

Notes: Ordered from the highest to lowest number of people employed in the food and drink sector. 2018 data for Latvia and Sweden for the drink subsector. Green shading denotes the countries for which the proportion of employment in the sector is 2.4% (the EU27 average) or more of the entire national employment. These are the countries for which the food and drink sector is the most important in terms of employment in the country.

Source: Eurostat, Labour Force Survey (employment of people aged 15 and over), 2019

The two subsectors – food (NACE 10) and drink (NACE 11) – differ considerably in size. In the EU27, the workforce in the food subsector is around 10 times larger than that in the drink subsector (see Table 4). Figure 2 shows, for each country, employment in the food subsector and in the drink subsector as proportions of employment in the sector. In 15 countries, 90% or more of people employed in the sector work in the food subsector, while 10% or fewer work in the drink subsector. In the remaining countries, the share of food subsector employment varies between 74% and 89%, with the smallest shares being in Luxembourg and Malta.

Figure 2: Employment in the food and drink subsectors as proportions of total sector employment in each Member State, 2019

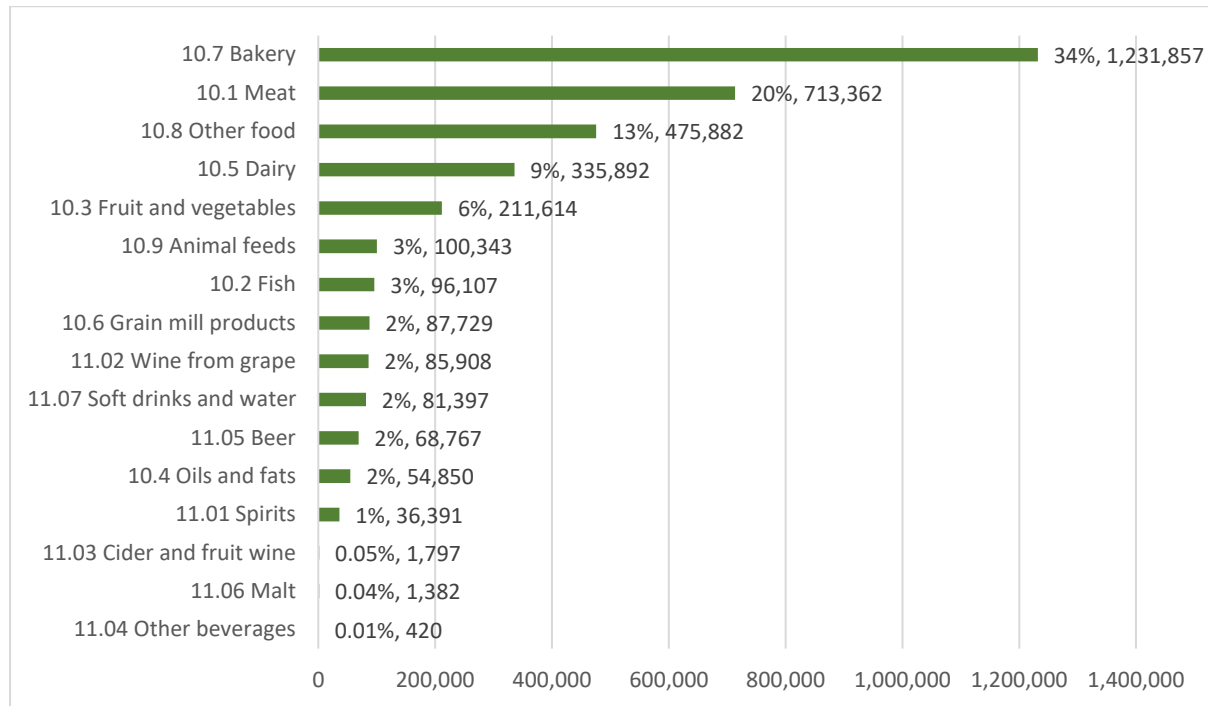


Note: 2018 data were used for Latvia and Sweden for the drink subsector.

Source: Eurostat, Labour Force Survey (employment of people aged 15 and over), 2019

There are also considerable variations in the employment in specific parts of the sector. As shown in Figure 3, the most important activity in the whole sector is manufacture of bakery products, employing 1.2 million people, which accounts for 34% of the sectoral workforce in the EU27. This segment includes both small village bakeries with only two or three employees and much larger ones. This is followed by meat processing, which includes both small butchers and larger slaughterhouses and meat factories. Manufacture of other food products, manufacture of dairy products and fruit and vegetable processing also employ a large share of people in this sector. Together, these five segments account for nearly 3 million employed people, or 82% of the total sectoral workforce. The least important parts of the sector are manufacture of other beverages, manufacture of malt and manufacture of cider and fruit wine, which employ 3,600 people or 0.1% of the sectoral workforce.

Figure 3: Numbers and proportions of people employed in different parts of the sector, EU27

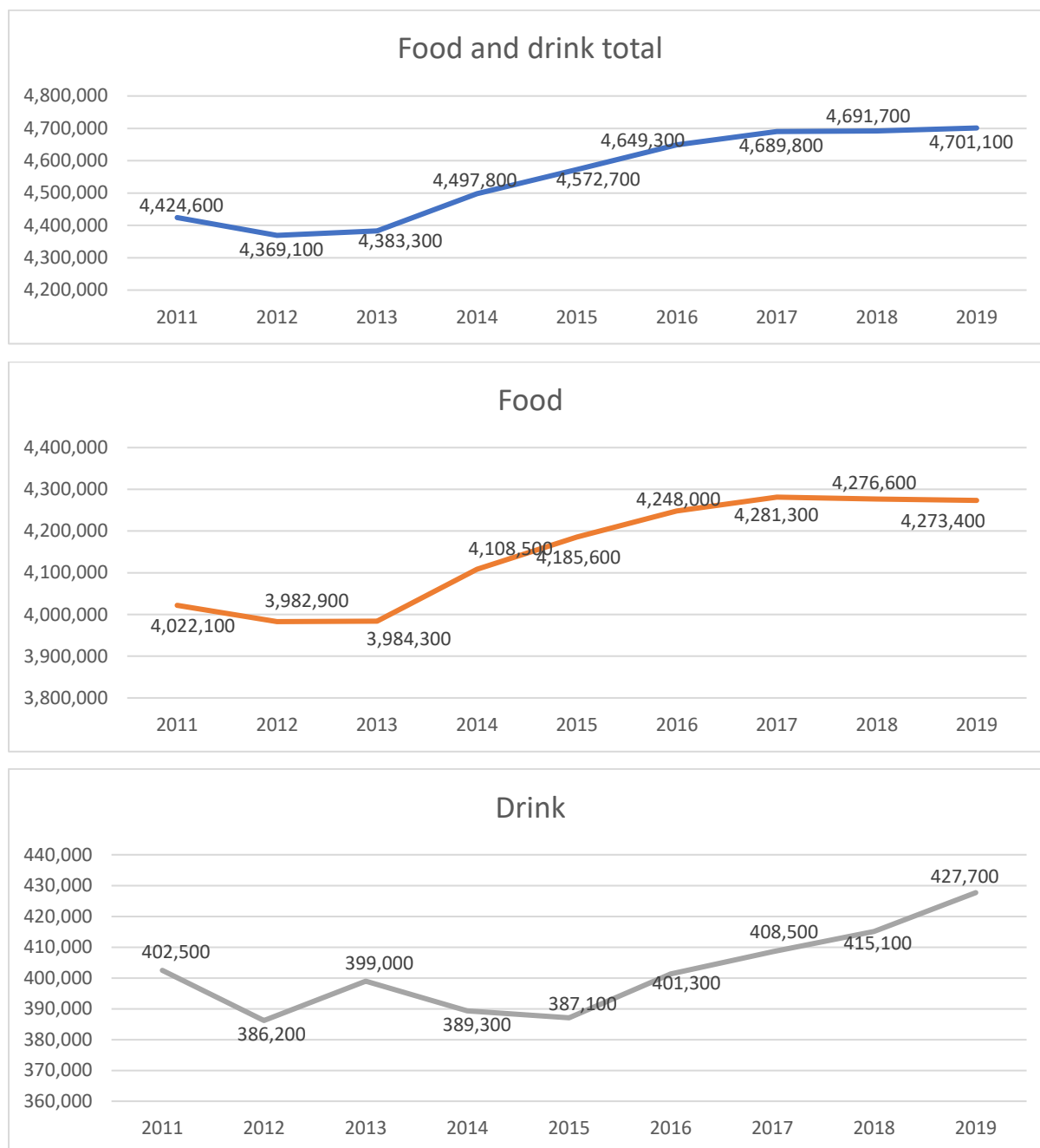


Note: Data collected for the current report by the Network of Eurofound Correspondents during 2020 do not cover the impact of the COVID-19 pandemic on the sector as the data collection was launched in the first half of the year.

Source: Network of Eurofound Correspondents' contributions to this study, 2020

Total employment in the food and drink sector in the EU27 has seen an increase of around 300,000 employees (6.2%) since 2011. While in 2012 and 2013 there was a slight dip in employment compared with 2011, the employment level then increased steadily to stay somewhat stable during recent years (Figure 4). The number of people employed in the food subsector has also increased by 6.2%. For the drink subsector, the increase was 6.3%.

Figure 4: Number of people employed in the food and drink sector, EU27, 2011–2019



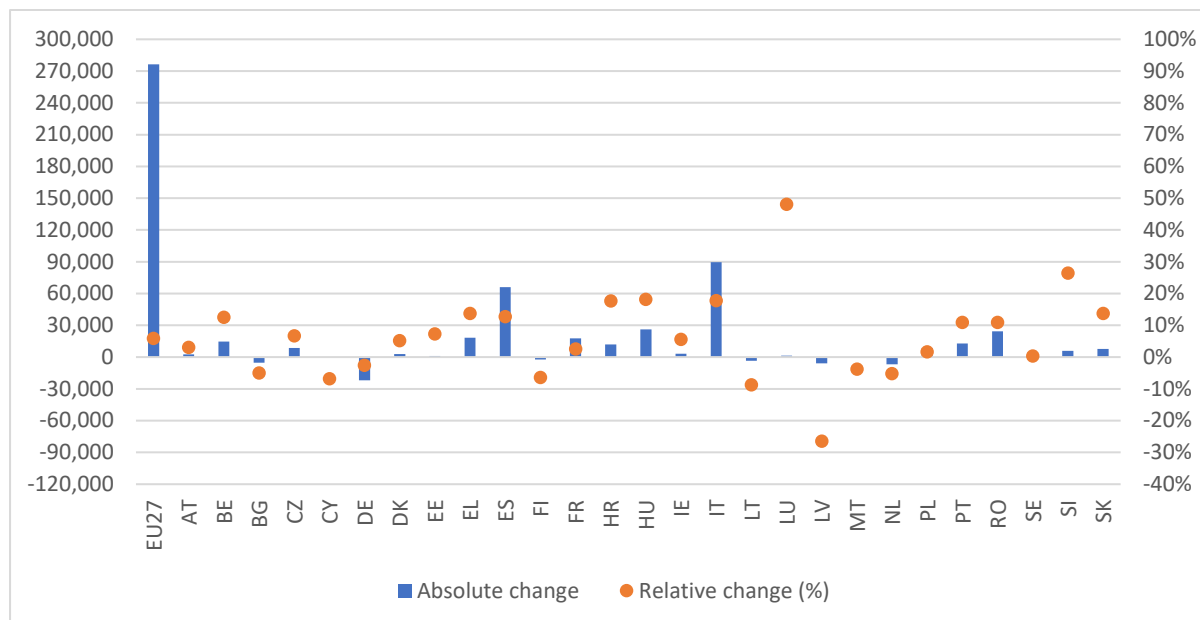
Source: Eurostat, Labour Force Survey (employment of people aged 15 and over), 2011–2019

The change in employment level from 2011 to 2019 varies considerably between the Member States, as shown in Figure 5. The biggest changes in absolute numbers are recorded in Italy and Spain, where sectoral employment has increased by 90,000 and by 66,000, respectively. Germany has seen the biggest decrease in absolute terms in sectoral employment, by nearly 22,000 people. Nearly no change occurred in Sweden (increase of 200 people) and Malta (decrease of 200 people).

Figure 5 also shows the relative change in the sectoral employment. The results for relative change are different from those for absolute change. Relative change was highest in Luxembourg, as the

sectoral workforce increased by 48%. It is followed by Latvia (decrease of 26%) and Slovenia (increase of 26%). In other countries, the relative change varies between a 9% decrease and an 18% increase in sectoral employment.

Figure 5: Change in the number of people employed in the food and drink sector, by Member States, 2011–2019



Notes: Data covering the drink subsector for Latvia and Sweden are from 2018 instead of 2019. For Estonia and Latvia, data are from 2012 instead of 2011. For Lithuania, data are from 2013 instead of 2011. No drink subsector data are available for Luxembourg before 2019.

Source: Eurostat, Labour Force Survey (employment of people aged 15 and over), 2019

According to the Network of Eurofound Correspondents, standard forms of employment prevail in the food and drink sector across most EU Member States. The network also indicates that the share of self-employed workers and temporary agency workers in the sector is minor, at around 3–5% of the total sectoral workforce in most Member States. Croatia and Hungary are two examples of Member States where self-employment in the sector has increased in recent years. Another aspect characterising the sector is the role of the foreign-born workforce.⁴ For example, in Austria the share of foreign-born workers has been increasing in recent years, especially for the seasonal jobs in the sector. Similar increases are revealed by the data collected by the Network of Eurofound Correspondents for this study for Bulgaria, Cyprus, Estonia, Poland and Slovenia. Usually, seasonal jobs are performed by foreign-born workers, relieving the labour shortage during peak food processing times.

⁴ As defined by Eurostat, the foreign-born population consists of people born outside their country of residence, including both people born in other EU Member States and people born outside the EU.

1.2. Companies in the food and drink sector and their economic development

In the EU27, there are nearly 290,000 food and drink companies, which account for 1.3% of the total number of companies (2018). The number of companies is highest in France and Italy (with more than 50,000 companies in each country), followed by Spain and Germany (with just under 30,000 companies in each country) (see also Table 5). Altogether, these countries represent 58% of EU27 food and drink companies. In the rest of the countries, the number of companies is below 20,000. The countries with the smallest numbers of companies in the sector are Cyprus, Estonia, Malta and Luxembourg, with fewer than 1,000 companies per country.

Table 5 also shows the number of companies as a share of each country's total number of companies in the entire economy. The EU27 average is 1.2% (the 10 countries with a share equal to or higher than 1.2% are shaded in blue in the table). The food and drink sector is more important – relative to other countries – in Greece, Croatia and Romania, where the share of the companies in the sector is 2% or above. In 10 countries, the share is below 1%, with the lowest being in the Netherlands, Sweden and Luxembourg.

Table 5: Companies in the food and drink sector, 2018

Member State	Number of companies in food and drink overall	Number of companies in food subsector	Number of companies in drink subsector	Share of country's total number of companies (%)	Share of the total EU27 sector companies (%)
FR	55,043	51,288	3,755	1.9	19
IT	54,860	51,579	3,281	1.5	19
ES	29,498	24,437	5,061	1.1	10
DE	28,800	26,543	2,257	1.1	10
PL	19,022	18,307	715	1.0	7
EL	16,265	15,164	1,101	2.3	6
PT	11,426	9,445	1,981	1.3	4
CZ	10,875	8,463	2,412	1.0	4
RO	9,928	9,244	684	2.0	3
NL	7,039	6,203	836	0.6	2
HU	6,640	4,479	2,161	1.1	2
BG	6,175	5,312	863	1.8	2
BE	5,840	5,388	452	0.9	2
SK	4,310	3,425	885	0.9	1
SE	4,052	3,480	572	0.6	1
AT	3,900	3,470	430	1.2	1
HR	3,251	2,721	530	2.1	1
SI	2,595	2,361	234	1.8	1
IE	1,966	1,843	123	0.7	1
FI	1,747	1,595	152	0.8	1
LT	1,735	1,649	86	0.8	1
DK	1,644	1,465	179	0.7	1
LV	1,229	1,079	150	1.1	0
CY	926	834	92	1.7	0
EE	726	626	100	0.9	0

Member State	Number of companies in food and drink overall	Number of companies in food subsector	Number of companies in drink subsector	Share of country's total number of companies (%)	Share of the total EU27 sector companies (%)
MT	381	366	15	1.2	0
LU	154	121	33	0.4	0
EU27	290,027	260,887	29,140	1.2	100

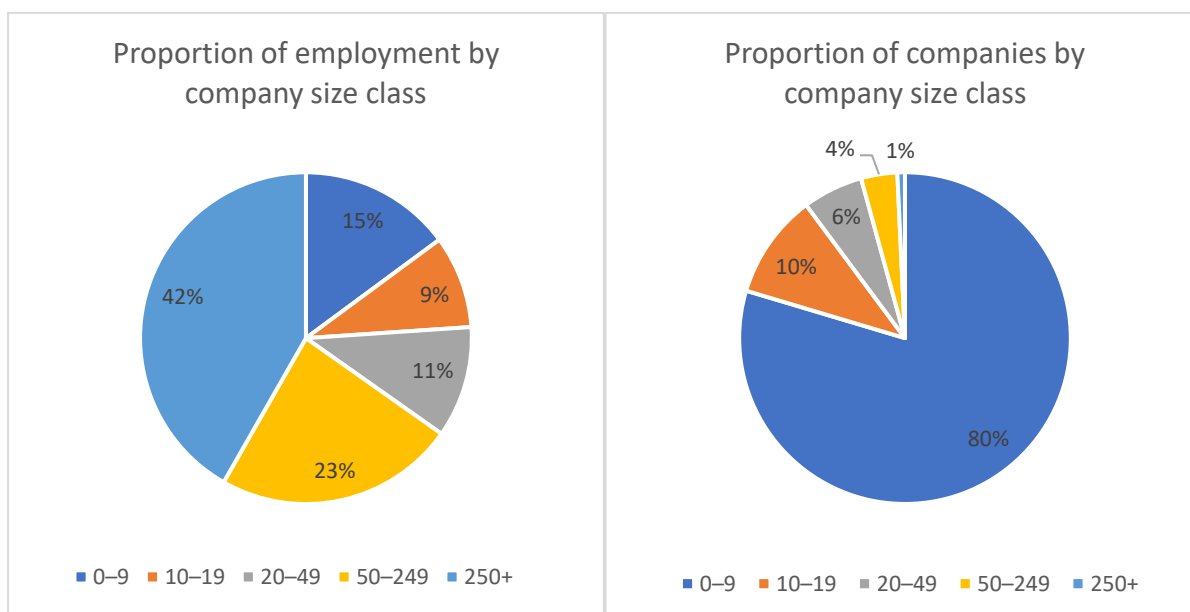
Notes: Ordered by the highest number of companies in the entire food and drink sector. 2017 data for France and Ireland for the food and drink subsectors. Authors' own calculation for Italy for drink subsector. The blue shading denotes the countries for which the proportion of companies in the sector in the country is equal to or higher than 1.2% of the total number of companies in the country (which is the EU average). These are the countries for which the food and drink sector is the most important in terms of enterprises in the country.

Source: Eurostat, Structural Business Statistics, 2018

The majority of the companies in the sector are microcompanies with up to nine employees per company, accounting for 80% of the total number of companies in the sector (see Figure 6 and Table 6). Large companies (250+ employees) account for 1% of all companies in the sector. This means that food and drink sector companies are generally somewhat larger than companies in the EU27 on average (80% are microcompanies, 16% are companies with 10–49 employees, under 4% are companies with 50–249 employees and 0.2% are companies with 250+ employees).

Figure 6 shows that the highest proportion of employees in this sector work in the largest companies (42% of the sectoral workforce), followed by medium-sized (50–249 employees) companies (23% of the workforce). Microcompanies (up to nine employees) employ 15% of the total sectoral workforce, and small-sized companies (10–49 employees) altogether employ 20% of employees. This shows that, although small and microcompanies are the most important in terms of absolute numbers, medium-sized and large companies are important for sector employment.

Figure 6: Proportion of companies and employment by company size class, EU27, 2018



Note: 2017 data for number of companies in food subsector in size classes 50–249 and 250+.

Source: Eurostat, Structural Business Statistics, 2018

Table 6: Numbers of companies and of people employed, total and by company size class, EU27, 2018

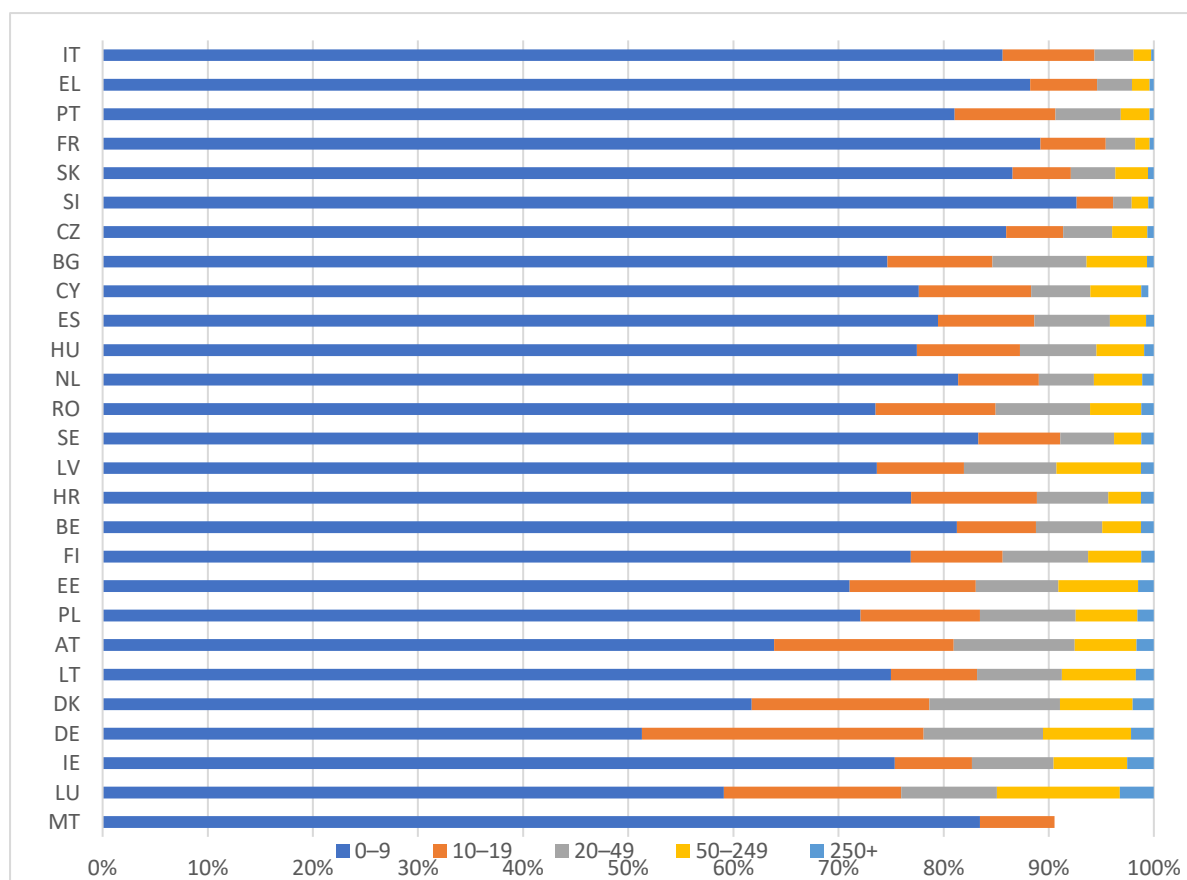
	Total number of companies	Number of companies by company size class				
		0–9	10–19	20–49	50–249	250+
Food	260,257	205,750	27,581	15,629	9,300	2,140
Drink	29,000	24,652	1,982	1,442	918	n.d.
Total	289,257	230,402	29,563	17,071	10,218	2,140
%	100	80	10	6	4	1
	Total employment	Number of people employed by company size class				
		0–9	10–19	20–49	50–249	250+
Food	4,100,000	620,000	380,000	488,597	963,795	1,673,843
Drink	420,709	50,000	27,383	n.d.	93,705	205,441
Total	4,520,709	670,000	407,383	488,597	1,057,500	1,879,284
%	100	15	9	11	23	42

Note: 2017 data for number of companies in food subsector in size classes 50–249 and 250+.

Source: Eurostat, Structural Business Statistics, 2018

The proportions of the company size classes are somewhat different across Member States, as can be seen in Figure 7. Slovenia has the largest share of microcompanies (93%), and altogether 11 countries have more than 80% of microcompanies in the sector. The smallest shares of microcompanies are recorded in Austria (64%), Denmark (62%), Luxembourg (59%) and Germany (51%). At the same time, Germany has the largest share of companies with 10–19 employees (27%), while in other countries the share in this size class is between 3% (in Slovenia) and 17% (in Austria, Denmark and Luxembourg). Austria, Denmark and Germany have the largest shares of companies with 20–49 employees (11–12%), with the lowest being in France (3%), Greece (3%) and Slovenia (2%). In the case of medium-sized companies with 50–249 employees, the share is highest in Luxembourg (12%), while in other countries the share is lower than 9%, with the smallest share being in France (1%). In the case of large companies (250+ employees), Luxembourg and Ireland have the largest shares of such companies in the EU27 (3% for both), with the smallest shares being in France, Greece, Portugal (0.4% in each) and Italy (0.3%).

Figure 7: Proportion of companies by size class (% of the total number of the sector's companies) in each Member State, 2018



Notes: 2017 data were used for France and for the food subsector for Ireland. No drink subsector data for Ireland were available. Authors' own calculation for drink subsector data for Italy. Missing data for Malta for size classes 20-49, 50-249 and 250+.

Source: Eurostat, Structural Business Statistics, 2018

In the EU27, the average number of people employed per one food and drink company is 14, which is considerably higher than the EU27 average for the total economy (5.6 in 2017 according to Eurostat data). Food subsector companies employ on average 14 employees per company, while drink subsector companies are somewhat smaller, employing on average 13 employees per company.

Table 7 shows the average number of people employed per company in the sector in each Member State. Luxembourg (38), Denmark (36) and Germany (34) have the highest average employment level per company, having thus more larger companies in the sector than other countries. Three countries have fewer than 10 employees per company on average (Greece – 8, Italy – 8, Slovenia – 7), indicating the higher share of small companies in those countries. The rest of the countries have an average of 10–27 employees per company. In the food subsector, Denmark (35), Luxembourg (35) and Hungary (31) have the largest companies on average, and Malta (6) and Slovenia (6) have the smallest. In the drink subsector, however, the largest companies on average are in Lithuania (36) and Germany (32), and the smallest are in Portugal (8), Slovakia (5) and Czechia (3).

Table 7: Average number of people employed per company in different parts of the sector, EU27

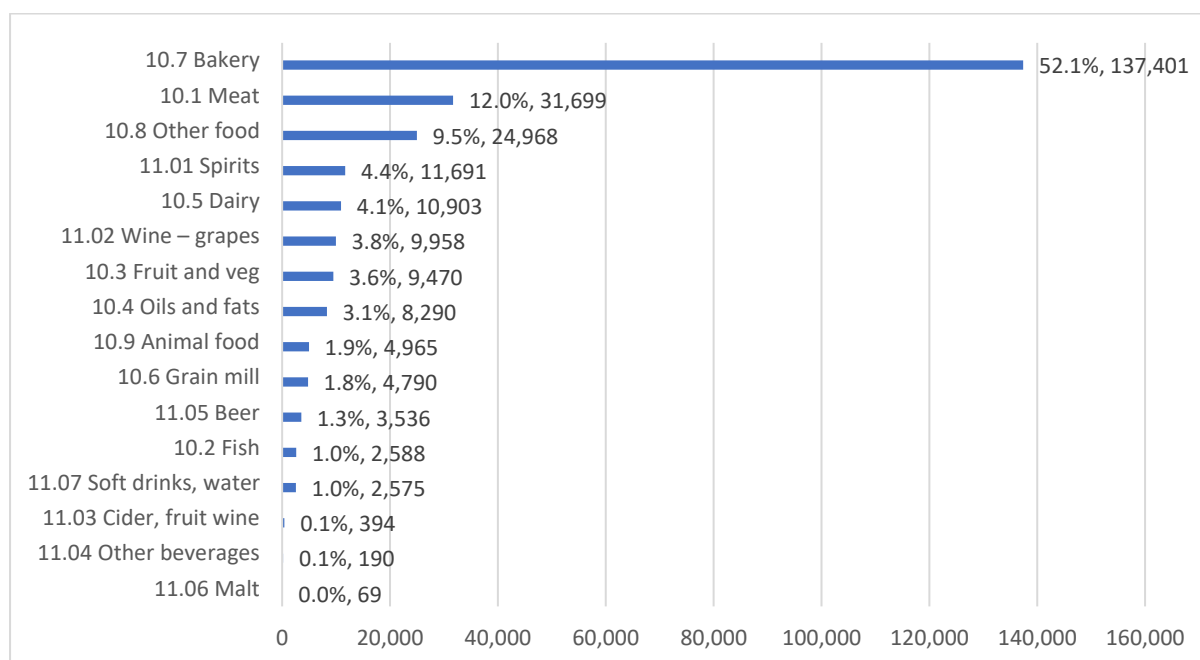
Member State	Food and drink total	10.1 Meat	10.2 Fish	10.3 Fruit and vegetables	10.4 Oils and fats	10.5 Dairy	10.6 Grain mill products	10.7 Bakery	10.8 Other food	10.9 Animal feeds	10 FOOD	11.01 Spirits	11.02 Wine from grape	11.03 Cider and fruit wine	11.04 Other beverages	11.05 Beer	11.06 Malt	11.07 Soft drinks and water	11 DRINK
AT	22	20	18	29	14	36	23	18	38	28	22	6	11	n.d.	n.d.	36	n.d.	43	21
BE	17	24	35	70	77	16	45	8	21	30	16	2	n.d.	n.d.	n.d.	27	44	108	29
BG	15	36	43	19	40	26	30	8	13	17	15	6	15	0	n.d.	94	n.d.	26	15
CY	14	24	7	18	5	23	28	14	7	11	15	6	4	no co.	no co.	97	no co.	8	10
CZ	6	5	52	36	33	47	11	6	11	8	8	0	15	n.d.	n.d.	26	9	22	3
DE	28	20	34	41	26	66	21	25	53	25	27	n.d.	n.d.	n.d.	n.d.	n.d.	n.d.	n.d.	32
DK	n.d.	100	39	n.d.	n.d.	127	n.d.	20	12	n.d.	35	n.d.	n.d.	n.d.	n.d.	n.d.	n.d.	n.d.	n.d.
EE	n.d.	41	21	11	n.d.	83	193	n.d.	n.d.	n.d.	17	n.d.	n.d.	n.d.	n.d.	n.d.	n.d.	n.d.	n.d.
EL	8	23	72	20	2	17	9	5	11	14	8	n.d.	n.d.	n.d.	n.d.	n.d.	n.d.	n.d.	12
ES	15	30	35	26	8	17	17	8	18	18	15	11	8	6	n.d.	23	n.d.	50	12
FI	19	46	6	12	9	79	15	11	22	11	19	29	no co.	4	1	25	36	6	19
FR	12	25	41	36	21	42	34	6	26	32	11	23	28	12	6	11	25	74	26
HR	19	34	31	11	7	42	12	15	34	13	20	12	7	2	1	22	41	38	13
HU	25	70	n.d.	33	69	174	29	19	18	54	31	4	9	13	n.d.	29	n.d.	17	11
IE	n.d.	n.d.	n.d.	n.d.	n.d.	n.d.	n.d.	n.d.	n.d.	n.d.	n.d.	n.d.	n.d.	n.d.	n.d.	n.d.	n.d.	n.d.	n.d.
IT	8	19	14	19	4	13	9	5	12	15	8	9	11	1	4	7	16	47	12
LT	26	33	no co.	3	7	255	38	15	24	70	25	163	no co.	24	no co.	40	27	16	36
LU	30	90	no co.	25	no co.	38	35	30	2	0	35	0	33	0	no co.	14	no co.	40	12
LV	19	30	30	8	9	45	24	14	15	11	20	31	1	3	1	18	18	26	17
MT	8	11	1	12	1	6	14	5	11	3	6	3	8	1	13	82	n.d.	50	29
NL	26	14	48	50	64	925	57	12	22	39	27	57	n.d.	n.d.	n.d.	11	n.d.	32	18
PL	n.d.	n.d.	n.d.	n.d.	n.d.	n.d.	n.d.	n.d.	n.d.	n.d.	n.d.	n.d.	n.d.	n.d.	n.d.	n.d.	n.d.	n.d.	n.d.
PT	10	24	49	13	4	15	11	7	12	31	10	2	8	17	n.d.	17	19	53	8
RO	17	48	49	8	27	24	18	12	14	11	16	17	11	2	6	66	12	38	29
SE	n.d.	n.d.	n.d.	n.d.	n.d.	n.d.	n.d.	n.d.	n.d.	n.d.	n.d.	n.d.	n.d.	n.d.	n.d.	n.d.	n.d.	n.d.	n.d.
SI	7	13	11	2	1	6	2	6	6	21	6	16	8	n.d.	n.d.	10	n.d.	25	13
SK	7	19	98	5	11	23	9	9	4	2	8	6	6	n.d.	2	22	26	2	5
EU 27	14	23	37	22	7	31	18	9	19	20	14	3	9	5	2	19	20	32	13

Note: n.d., no data; no co., no companies in the sector.

Sources: Eurostat, Structural Business Statistics, 2018; Network of Eurofound Correspondents' contributions to this study, 2020

The companies in the sector are engaged in a variety of fields of activities. According to the information received from the Network of Eurofound Correspondents, which is visualised in Figure 8, more than half of companies are active in the manufacture of bakery products (NACE 10.7), accounting for 52% or some 137,000 companies. It is followed by meat processing (NACE 10.1), which corresponds to 12% of companies (some 31,000), and manufacture of other food products (NACE 10.8), which corresponds to 9.5% of all companies (some 25,000). Fewer than 5% of companies are engaged in each of the rest of the activities, with a total of 26.2% of all companies being engaged in any of these activities. Manufacture of cider and fruit wine (NACE 11.03), manufacture of other beverages (NACE 11.04) and manufacture of malt (NACE 11.06) are the least important in the sector, each corresponding to 0.1% or less. Companies are represented in at least 18 countries in the case of manufacture of cider and fruit wine (Spain being the most prominent, with 130 companies, followed by Bulgaria, with 55 companies), in at least 15 countries in the case of manufacture of other beverages (Italy and Greece being the most prominent, with 56 and 40 companies, respectively) and in at least 12 countries in the case of manufacture of malt (Czechia and France being the most important, with 22 and 13 companies, respectively).

Figure 8: Number and share of companies in different parts of the sector, EU27



Source: Network of Eurofound Correspondents' contributions to this study, 2020

The number of companies in the sector fluctuated between 2011 and 2018, as shown in Figure 9. The number of companies decreased considerably in 2013 and 2017. It was rather stable between those decreases, but an upwards shift by 3% is noticeable in 2018. In total, during 2011–2018, the number of companies rose by 2.5% in the EU27. The fluctuations have been mainly visible in the food subsector, although the total change in the number of companies over the period has been very small in that sector (increase of some 600 companies or 0.2%). At the same time, in the drink sector the number of companies has increased steadily year by year from 22,699 to 29,000 (upwards shift of 27.7%).

Figure 9: Number of companies in the food and drink sector in the EU27, 2011–2018



Note: Authors' own calculation of drink subsector data for 2015.

Source: Eurostat, Structural Business Statistics, 2018

Table 8 provides details of the largest employers in the food and drink sector in the EU27.

Table 8: Largest employers in the food and drink sector

MS	Subsector	Names of the largest employers in the sector	Estimated number of (sector-related) employees	Name of trade union(s) organising the employees in the company	Name of employer organisation(s) to which this employer is affiliated	Collective bargaining type applicable for this employer (SEB/MEB)
AT	Food	Agrana Group	2,519 ⁵	PROGE, GPA	FIAA	MEB
	Food	Marcher Group	1,800	PROGE, GPA	FIAA	MEB
	Drink	Brau Union Österreich	2,700	PROGE, GPA	FIAA	MEB
	Drink	Rauch Fruchtsäfte	Over 2,000	PROGE, GPA	FIAA	MEB

⁵ Agrana Group had 2,519 employees in Austria and 8,920 employees in total (worldwide).

Representativeness of the European social partner organisations: Food and drink sector

MS	Subsector	Names of the largest employers in the sector	Estimated number of (sector-related) employees	Name of trade union(s) organising the employees in the company	Name of employer organisation(s) to which this employer is affiliated	Collective bargaining type applicable for this employer (SEB/MEB)
BE	Food	Puratos	1,300	No information	FEVIA/FGBB	Both
	Food	Arvesta	785	No information	Unknown	Both
	Drink	AB InBev	3,000	ABVV-FGTB BBTk SETCa, ABVV-FGTB Horval, ACV-CSC Puls, ACV-CSC, Voeding en Diensten, ACV-CSC CNE	FEVIA	Both
	Drink	FrieslandCampina Belgium	1,159	ABVV-FGTB BBTk SETCa, ABVV-FGTB Horval, ACV-CSC Puls, ACV-CSC Voeding en Diensten	FEVIA	Both
BG	Food	Bella Bulgaria AD	2,682	n.d.	AMB	None
	Food	Bonny Holding AD	1,394	Local trade union organisation for Bonny Holding AD (meat factory in Ruse), affiliated to TUBFB	AMB	None
	Drink	Coca-Cola Hellenic Bottling Company Bulgaria AD	1,043	ITUFCTTS at CITUB; FFBI at Podkrepa CL	BSDA, Spirits Bulgaria, CEIBG	SEB
	Drink	Kamenitza AD	659	TUBFB	UBB	Both
CY	Food	Charalambides Christis Ltd	700	SEBETTYK-PEO, OMEPEGE-SEK	OEB, CCCI	SEB
	Food	Mitsides Public Company	160	SEBETTYK-PEO, OMEPEGE-SEK	OEB, CCCI	SEB
	Drink	KEO plc	400	SEBETTYK-PEO, OMEPEGE-SEK	OEB, CCCI	SEB
	Drink	Coca-Cola HBC Cyprus (until June 2020, the name of the company was Lanitis Bros Ltd)	270	Segdamelin-PEO, OBIEK-SEK	OEB, CCCI	SEB
CZ	Food	Penam, a.s.	1,841	NOS PPP	PK ČR	SEB
	Food	Madeta, a.s.	1,406	NOS PPP	PK ČR	SEB
	Drink	Plzeňský Prazdroj, a.s.	1,977	NOS PPP	PK ČR	SEB
	Drink	Budějovický Budvar, n. p., Budweiser Budvar, National Corporation, Budweiser Budvar, Entreprise Nationale	697	NOS PPP	PK ČR	SEB

Representativeness of the European social partner organisations: Food and drink sector

MS	Subsector	Names of the largest employers in the sector	Estimated number of (sector-related) employees	Name of trade union(s) organising the employees in the company	Name of employer organisation(s) to which this employer is affiliated	Collective bargaining type applicable for this employer (SEB/MEB)
DE	Drink	Coca-Cola	7,000	NGG	Wirtschaftsvereinigung Alkoholfreie Getränke (wafg)	SEB ⁶
	Food	Aryzta	About 2,300	NGG		SEB
	Food	Ferrero	Around 5,000	NGG	Bundesverband der Deutschen Süßwarenindustrie	MEB
	Food	Tönnies	17,500	NGG	n.d.	n.d.
	Food	Westfleisch	7,000	NGG	n.d.	n.d.
DK	Food	Danish Crown	26,000	NNF, 3F, HK Handel	DI	Both
	Drink	Carlsberg	2,000	3F, HK Handel	DI	Both
EE	Food	HKScan Estonia	1,073	IMPTAL, HKScan trade union (company-level trade union)	ETL	SEB
	Food	Orkla Eesti (includes also beverages)	498	AS Kalev trade union (company level, represents employees of one subsidiary of Orkla)	ETL	n.d.
	Drink	A. Le Coq	359	No information	ETL	n.d.
	Drink	Saku Õlletehas	315	No information	ETL	n.d.
EL	Food	Delta Foods S.A.	1,504	POEUGTP	SEVT, which is a member of SEV	MEB
	Food	Soya Hellas S.A.	n.d.	POEUGTP	No information available	n.d.
	Drink	Coca-Cola 3E Hellenic Bottling Company	1,506	POEUGTP through the company unions of Coca-Cola Athens, Aigio and Hrakleio	SEVT, which is a member of SEV	MEB
	Drink	Nestlé Hellas S.A.	1,000	POEUGTP	SEVT, which is a member of SEV	MEB
ES	Food	Nueva Pescanova	10,512	CCOO, UGT, CIG	Conxemar	Both
	Food	Bimbo	8,523	CCOO, UGT	Produlce	Both
	Drink	Cobega	6,324	CCOO, UGT	Anfabra	Both
	Drink	Mahou San Miguel	3,150	CCOO	Cerveceros de España	Both
FI	Food	Valio	3,300	MVL, SEL	No information available	SEB
	Food	HKScan	2,900	No information	No information available	n.d.
	Drink	Sinebrychoff	700	No information	No information available	n.d.
	Drink	Hartwall	700	No information	No information available	n.d.

⁶ There are also acknowledgments on old MEB contracts

Representativeness of the European social partner organisations: Food and drink sector

MS	Subsector	Names of the largest employers in the sector	Estimated number of (sector-related) employees	Name of trade union(s) organising the employees in the company	Name of employer organisation(s) to which this employer is affiliated	Collective bargaining type applicable for this employer (SEB/MEB)
FR	Food	Bigard Group	15,000	FGA-CFDT, FGTA-FO, CFE-CGC Agro (SNI2A CFE-CGC), CFTC-CSFV	ANIA	Both
	Food	Lactalis	15,000	FGA-CFDT, FGTA-FO, CFE-CGC Agro (SNI2A CFE-CGC), CFTC-CSFV	ANIA	Both
	Food	Nestlé	3,000	FGA-CFDT, FNAF-CGT, FGTA-FO, CFE-CGC Agro (SNI2A CFE-CGC), UNSA, CFTC-CSFV	ANIA	Both
	Drink	Danone	9,000	FGA-CFDT, FNAF-CGT, FGTA-FO, CFE-CGC Agro (SNI2A CFE-CGC)	ANIA	Both
	Drink	Coca-Cola	2,600	FGA-CFDT, FNAF-CGT, FGTA-FO, CFE-CGC Agro (SNI2A CFE-CGC)	ANIA	Both
HR	Food	Podravka	4,000	PPDIV	CEA – Food Industry and Agriculture Association	SEB
	Food	Belje	1,500	PPDIV	CEA – Food Industry and Agriculture Association	SEB
	Drink	Jamnica	800	PPDIV	CEA – Food Industry and Agriculture Association	SEB
	Drink	Coca-Cola	500	PPDIV	CEA – Food Industry and Agriculture Association	SEB
HU	Food	Pick Szeged Szalámigyár és Húsüzem (part of the Bonafarm Group)	2,000	HDSZ, EMFSZ		SEB
	Food	Kométa 99	777	HDSZ		SEB
	Drink	Dreher Sörgyárak Zrt.	608	ÉDSZ		SEB
	Drink	Szentkirályi Magyarország Kft.	591	ÉDSZ		SEB
IE	Food	Kerrygold	3,300	SIPTU	IBEC	SEB
	Food	Glanbia	1,700	SIPTU, Dairy Executives Association	IBEC	SEB
	Drink	Diageo	920	GSU, SIPTU	IBEC	SEB
	Drink	C&C	320	SIPTU	IBEC	SEB

Representativeness of the European social partner organisations: Food and drink sector

MS	Subsector	Names of the largest employers in the sector	Estimated number of (sector-related) employees	Name of trade union(s) organising the employees in the company	Name of employer organisation(s) to which this employer is affiliated	Collective bargaining type applicable for this employer (SEB/MEB)
IT	Food	Barilla	4,158	FAI CISL, FLAI CGIL, UILA UIL, Cobas Lavoro Privato	Unione Italiana Food (Federalimentare)	Both
	Food	Luigi Lavazza	n.d.	FAI CISL, FLAI CGIL, UILA UIL	Unione Italiana Food (Federalimentare)	Both
	Drink	Coca-Cola Italia	2,000	FAI CISL, FLAI CGIL, UILA UIL, Adl Cobas	Unione Italiana Food (Federalimentare)	Both
	Drink	Davide Campari-Milano	839	FAI CISL, FLAI CGIL, UILA UIL	Federvini (Federalimentare)	Both
LT	Food	Žemaitijos Pienas, AB	1,200			None
	Food	Mantinga, UAB	1,100		Confederation of Lithuanian Industrialists	None
	Drink	MV Group Production, AB	500	LTUFP		SEB
	Drink	Kalnapilio – Tauro Grupė, UAB	300	LTUFP		SEB
LU	Food	Presta Meat SA	500			None
	Food	Groupe Oberweis SA	420			None
	Drink	Les domaines de Vinsmoselle	110	LCGB		SEB
	Drink	Brasserie Nationale Bofferdin	50	LCGB, OGB-L	FIAL	SEB
LV	Food	Orkla Latvija	855	LIA	LPUF	SEB
	Food	Putnu Fabrika Ķekava, AS	740	LLPNA	LPUF	None
	Drink	Latvijas Balzams	604		LPUF	SEB
	Drink	Cido Grupa	323		LPUF	n.d.
MT	Food	Foster Clark	180	GWU	No information available	SEB
	Food	Consolidated Biscuit Co.	190	UHM	No information available	SEB
	Drink	Simonds Farsons Cisk plc	470	GWU and UHM	MEA	SEB
	Drink	Benna Dairy Products	120	GWU	No information available	SEB
NL	Food	FrieslandCampina	770	FNV, CNV Vakmensen, De Unie	NZO	MEB
	Food	Vion	4,544	CNV Vakmensen, FNV	COV	MEB
	Drink	Heineken Group	4,000	FNV, CNV Vakmensen, De Unie, MHP Heineken (an independent network of professionals within Heineken who have organised themselves for social dialogue)	None: Heineken has its own collective labour agreement (CAO)	SEB
	Drink	Douwe Egberts	2,100	FNV, CNV, Vakmensen, De Unie	None: Douwe Egberts has its own collective	SEB

Representativeness of the European social partner organisations: Food and drink sector

MS	Subsector	Names of the largest employers in the sector	Estimated number of (sector-related) employees	Name of trade union(s) organising the employees in the company	Name of employer organisation(s) to which this employer is affiliated	Collective bargaining type applicable for this employer (SEB/MEB)
					labour agreement (CAO)	
PL	Food	Animex	9,600	NSZZ Solidarność, OPZZ	Association 'Polskie Mieso' (member of PFPZ)	SEB
	Food	Nestlé	5,300	NSZZ Solidarność, OPZZ	PFPZ	SEB
	Drink	Maspex	7,500	NSZZ Solidarność	PFPZ	SEB
	Drink	Grupa Żywiec	2,300	NSZZ Solidarność, OPZZ, FZZ	ZPPP-BP	SEB
PT	Food	Nestlé Portugal	2,066	FESAHT, SETAAB, probably also some others	Nestlé is a member of FIPA and is also affiliated to several other associations, for instance AICC, ANIL and APIAM	MEB
	Food	Lactogal	1,489	FESAHT, SETAAB, probably also some others	ANIL	MEB
	Drink	Sumol+Compal	1,597	FESAHT, SETAAB, probably also some others	Sumol+Compal is a member of FIPA and is also affiliated to APIAM	MEB
	Drink	Super Bock Group	790	FESAHT, SETAAB, probably also some others	Cervejeiros de Portugal (business association)	SEB
RO	Food	Unicarm SRL	2,900	Sindalimenta	ARC (member of Romalimenta)	None
	Food	Vel Pitar SA	2,269			None
	Drink	Romaqua Group SA	2,143	Apemin Trade Union, member of CNSLR Fratia	ANBR (member of Romalimenta)	None
	Drink	Ursus Breweries SA	1,504	Sindalimenta	Romalimenta	None
SE	Food	AAK AB	3,609	Livs, Ledarna, Unionen, Sveriges Ingenjörer	Li	MEB
	Food	Arla Foods AB	2,908	Livs, Ledarna, Unionen, Sveriges Ingenjörer	Li	MEB
	Drink	AAK AB	3,609	Livs, Ledarna, Unionen, Sveriges Ingenjörer	Li	MEB
	Drink	Scandi Standard AB	3,005	Livs, Ledarna, Unionen, Sveriges Ingenjörer	Li	MEB

MS	Subsector	Names of the largest employers in the sector	Estimated number of (sector-related) employees	Name of trade union(s) organising the employees in the company	Name of employer organisation(s) to which this employer is affiliated	Collective bargaining type applicable for this employer (SEB/MEB)
SI	Food	Perutnina Ptuj, d.o.o.	3,600	Trade union of Perutnina Ptuj – S KŽI	GZS	Both
	Food	Žito, d.o.o.	700	Trade union of Žito – S KŽI	GZS	Both
	Drink	Pivovarna Laško Union, d.o.o.	600	Trade union of Pivovarna Laško Union – S KŽI	GZS	Both
	Drink	Radenska, d.o.o.	267	Trade union of Radenska – S KŽI	GZS	Both
SK	Food	Mecom Group s.r.o.	1,135		No information available	None
	Food	I.D.C. Holding, a.s.	1,247		No information available	None
	Drink	Plzeňský Prazdroj Slovensko, a.s.	553	OZP SR	PKS	Both
	Drink	Heineken Slovensko, a.s.	668	OZP SR	No information available	Both

Notes: MEB, multi-employer bargaining; n.d., no data available; SEB, single-employer bargaining.

Source: Network of Eurofound Correspondents' contributions to this study, 2020

Table 9 shows the proportions of the workforce covered by the largest companies in the sector in each Member State. In Cyprus, the largest companies are most important, in comparison with other countries, as these companies employ 57.5% of the sectoral workforce. The four largest companies also play an important role in the sector in Denmark (48.4% of sectoral workforce covered) and in Luxembourg (40%). Denmark and Luxembourg have relatively small shares of small companies, and the average number of employees per company is relatively high. The significance of the largest companies in terms of employment is smallest in Greece (3%), Hungary (2.8%), Italy (1.4%) and Czechia (1.2%). These countries have relatively high shares of small companies, and the average number of employees per company is relatively low.

Table 9: Proportion of the sectoral employment in the largest companies in the food and drink sector in EU27 Member States

MS	Number of people employed in the entire sector	% of the sectoral workforce in the largest company in food	% of the sectoral workforce in the second largest company in food	% of the sectoral workforce in the largest company in drink	% of the sectoral workforce in the second largest company in drink	% of the sectoral workforce in the four largest companies in the sector in total
AT	82,300	n.d.	n.d.	n.d.	n.d.	n.d.
BE	117,200	1.1	0.7	2.6	1.0	5.3
BG	107,200	2.5	1.3	1.0	0.6	5.4
CZ	125,900	0.6	0.1	0.3	0.2	1.2
CY	10,300	17.9	13.7	19.2	6.8	57.5
DE	862,600	n.d.	n.d.	n.d.	0.0	n.d.

MS	Number of people employed in the entire sector	% of the sectoral workforce in the largest company in food	% of the sectoral workforce in the second largest company in food	% of the sectoral workforce in the largest company in drink	% of the sectoral workforce in the second largest company in drink	% of the sectoral workforce in the four largest companies in the sector in total
DK	57,900	44.9	n.d.	3.5	0.0	48.4
EE	15,000	7.2	3.3	2.4	2.1	15.0
EL	132,600	1.1	n.d.	1.1	0.8	3.0
ES	520,600	2.0	1.6	1.2	0.1	4.9
FI	37,800	8.7	7.7	1.9	1.9	20.1
FR	679,100	2.2	0.4	1.3	0.4	4.4
HR	66,900	6.0	2.2	1.2	0.7	10.2
HU	143,500	1.4	0.5	0.4	0.4	2.8
IE	55,700	5.9	3.1	1.7	0.6	11.2
IT	504,100	0.8	n.d.	0.4	0.2	1.4
LT	40,400	3.0	2.7	1.2	0.7	7.7
LU	2,700	18.5	15.6	4.1	1.9	40.0
LV	22,700	3.8	3.3	2.7	1.4	11.1
MT	5,300	3.4	3.6	8.9	2.3	18.1
NL	130,400	0.6	3.5	3.1	1.6	8.8
PL	513,800	1.9	1.0	1.5	0.4	4.8
PT	118,400	1.7	1.3	1.3	0.7	5.0
RO	221,800	1.3	1.0	1.0	0.7	4.0
SE	49,400	7.3	5.9	7.3	6.1	26.6
SI	22,300	16.1	3.1	2.7	1.2	23.2
SK	56,700	2.0	2.2	1.0	1.2	6.4

Note: n.d., no data available.

Source: Network of Eurofound Correspondents' contributions to this study, 2020

According to the Network of Eurofound Correspondents, in the food and drink sector all sizes of companies are present, although small companies and microcompanies are prevailing. Large companies employ at least half of the sectoral workforce. In the drink subsector, companies tend to be smaller. In terms of company type, private companies prevail in most countries. The share of cooperatives is very small, although visible, in several countries (Austria, Cyprus, Estonia, Finland, Germany, Greece, Ireland, Malta). Cooperatives are mostly active in the manufacture of dairy products, fruit and vegetable processing and wine production.

1.3. Specificities and challenges in the food and drink sector

As an important part of the European manufacturing industry, the food and drink industry is to be considered in the EU policy context of the Farm to Fork Strategy of the Green Deal. The agri-food ecosystem is part of the wider industrial strategy of the Directorate-General for Internal Market, Industry, Entrepreneurship and SMEs, but it is not specifically part of the European social dialogue. The Pact for Skills, the impact of the COVID-19 crisis and of the 2022 Russian invasion of Ukraine are

also part of the wider context and challenges of the European food and drink industry (European Commission, undated).

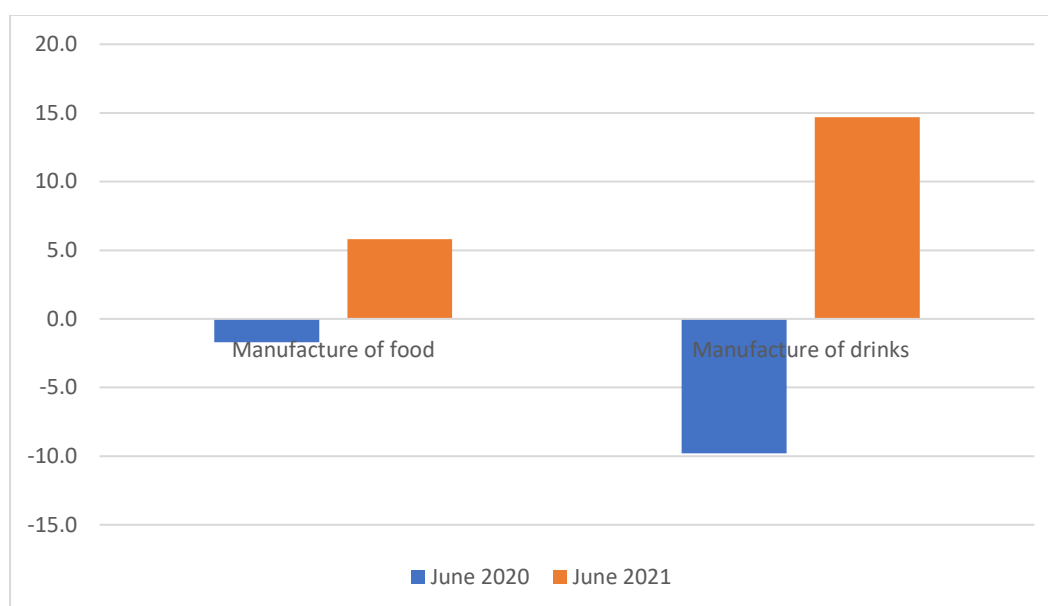
According to the most recent *Key figures on the European food chain* report (Eurostat, 2021a), in 2018 in the EU27 there were almost 300,000 enterprises active in the manufacture of food and drink activities, which constitutes over 14% of the entire manufacturing sector in the EU. This finding is confirmed by the data collected by the Network of Eurofound Correspondents. In some countries, such as Cyprus, the food and drink sector is considered the backbone of the manufacturing industry. On the other hand, the sector is declining in Hungary. Meat processing, manufacture of dairy products, manufacture of bakery products, fruit and vegetable processing and manufacture of other food products are the most important activities in the food subsector in most of the EU Member States. For the drink subsector, beer, non-alcoholic drinks and, in some regions, wine and spirits are the most important products. The food subsector is larger in terms of both companies and employees. Fish and malt are the least important products in terms of the workforce employed in their production.

Food and drink is a sector that plays an important role in the exports of several countries: food and drink account for around one-third of exported goods in Estonia and Germany. It is also important in Austria, Ireland, Lithuania and Poland. In addition, in countries such as Croatia and Germany, the share of exports of the sector is expected to grow. Increased investments in sustainability, new formulas, improved packaging, distribution channels, markets, new products (which are mostly motivated by changing consumer preferences) and in healthier choices are all trends impacting the current and future development of the sector. The EU has also played an important role in the sector's development, since, for example, development was boosted when Poland joined the EU. On the other hand, Brexit is seen as a challenge, as the UK has been the main export destination for some countries (e.g. Poland).

In terms of unionisation of the sector, the Network of Eurofound Correspondents collected information on recruitment difficulties and obstacles to the organisation of the workers in the sector in some countries. First, it is more difficult for trade unions to organise workers of microcompanies and small companies, which prevail in the sector, than it is for them to organise workers of the larger companies. For larger companies, there are often statutory obligations to form works councils or representative bodies, as is the case in Belgium, Cyprus, Estonia, Germany, Latvia, Malta and Poland. For smaller companies, in the absence of such obligations, it is for trade unions to organise those workers in workplaces with smaller numbers of employees. The second barrier to unionisation in the sector is represented by the increasing share of foreign-born workers and/or seasonal workers, as was reported by trade unions from Poland and Slovenia. This can be linked to language issues, the prevalence of fixed-term contracts, outsourcing or lack of familiarity with established industrial relations in the country of employment. In Malta, however, collective agreements also cover the outsourced workforce. The third obstacle is linked to the decreasing membership of trade unions in general, which is not specific to the food and drink sector. This was mentioned especially by representatives from Estonia and Hungary, where collective agreements cover both unionised and non-unionised employees. Finally, the low interest in being organised manifested by the white-collar workforce and the older workforce is an obstacle for this sector, as recorded in Finland for example. Overall, the meat processing subsector is the most difficult to organise by trade unions (except in Denmark), while manufacture of drinks, manufacture of dairy products and manufacture of bakery products are the most organised parts of the sector, as shown by data collected by the Network of Eurofound Correspondents. The reasons for this were not in the scope of this study.

The global COVID-19 pandemic impacted the food and drink sector. According to Eurostat (2021b), accommodation and food services were among the parts of the economy most affected by the pandemic in 2020. The same source indicates that the food and drink sector was particularly disrupted in 2020, during which, at EU level, a decrease of almost 10% was registered in the manufacture of drinks, compared with the same period in 2019. The food subsector was less impacted, registering a decrease of 1.7% for the same period. However, the decline in production was temporary, as in the same period of 2021 the manufacture of drinks recorded an increase of almost 15% at EU level, while food subsector production increased by 5.8%, compared with the same period in 2020 (Figure 10).

Figure 10: Change in volume of production in manufacture of food and drink (%), EU27, June 2021 compared with June 2020



Source: Eurostat, *Manufacture of food products, Volume index of production data set*

EFFAT also signalled in the first half of 2020, at the onset of the pandemic, that food processing plants were extremely affected by the spread of the disease due to the physical space and working conditions in the plants: how production lines are organised, line speed, proximity and ventilation. The trade union organisation emphasised the need to enhance precautionary measures to protect the food workers' health and to decrease the threat to the performance of the sector (EFFAT, 2020). The data collected by the Network of Eurofound Correspondents provide an overview of the impact of the COVID-19 pandemic on the food and drink sector at national level. In Croatia, Denmark, Estonia, Greece, Hungary and Lithuania, the impact was not severe compared with the impact on other sectors. However, in Belgium, Bulgaria, Malta and Poland, the pandemic affected the sector significantly. Overall, the COVID-19 impact has been less severe for larger companies, as recorded in Denmark and Estonia, while small and medium-sized enterprises (SMEs) have been impacted to a larger extent, as was the case in Estonia.

Food and drink production saw a decline due to, on the one hand, disruptions such as restaurants being closed and, on the other hand, a decrease in impulse purchases and other such adaptations to the new reality. Still, all sales of food and drink for private consumers generally increased. More difficulties are recorded for those companies that had direct contracts with hotel, restaurant and catering sector (Horeca) companies. Another source of difficulty has been export, which has seen a

decline in general, but also an increase in export costs, as recorded in Ireland and Lithuania. Simultaneously, import was also affected, putting a strain on the entire sector in terms of receiving raw materials and packaging supplies. This resulted in an increase in prices or even in questions about food self-sufficiency, as reported in Czechia. In Germany and Ireland,⁷ the media reported several COVID-19 outbreaks as a result of insufficient health and safety measures in meat processing plants. The reduction in the foreign-born workforce, due to borders being closed, also had an impact on the sector, for example in Estonia and Poland.

Some specific measures to relieve the difficulties in the sector include a decrease in the value-added tax rate in Greece and temporarily reassigning employees in Slovakia. In Malta, value-added tax on coffee and non-alcoholic beverages was temporarily reduced from 24% to 13%. In Slovakia, following an agreement between the Food Chamber of Slovakia and the Association of Hotels and Restaurants, some workers were temporarily reassigned from hotels to food companies.

In 2020, EFFAT and FoodDrinkEurope issued four joint opinions on the challenges of the COVID-19 crisis for the food and drink sector (see Table 1). This underscores the importance of the role of the food and drink ESSDC in voicing concerns in the sector during the COVID-19 crisis.

⁷ Euractiv, 2020.

2. National level of interest representation

This chapter presents an overview of the national-level trade unions and employer organisations active in the food and drink sector.

This study has identified a total of 92 sector-related trade unions and 174 sector-related employer organisations in the EU27. The methodology applied for inclusion of national-level organisations is described in Section 0.3 and is standard for all representativeness studies in this series. Overall, there is at least one sector-related organisation for employees and at least one sector-related organisation representing employers' interests in each country. Most of the countries have at least two trade unions in the sector. Table 10 illustrates that there is only one sectoral trade union per country for Czechia, Estonia, Germany and Slovenia. Portugal has the most trade unions in the sector (8), followed by Belgium (6) and Sweden (6).

The highest number of employer organisations was identified in France (23), followed by the Netherlands and Poland (which both have 19 organisations). Nine countries have only one employer organisation.

Table 10 shows how many organisations each country has in detail. The grey cells (and corresponding numbers in brackets) indicate the organisations that are sector-related, meaning that these organisations have members in the sector but are neither trade unions nor employer organisations. However, these organisations are not analysed in detail because of their minor relevance to this study (they are not represented by the European-level social partners relevant to this study and they are not involved in collective bargaining). There are two trade unions and 62 employer organisations in this category. These organisations are not covered in the following chapters, but information about them is presented in Annex 2. This leaves a total of **90 trade unions and 112 employer organisations** in the food and drink sector to be further analysed in this study. Some employer organisations are classified as business associations in the tables. Their inclusion stems from their membership of a European-level social partner organisation relevant to this study or from their involvement in collective bargaining (see also Section 0.4). The Network of Eurofound Correspondents specified this classification for each organisation based on the information received from the organisations. The average number of sectoral trade unions per Member State is 3.3, which is in line with the averages recorded for other sectors (Eurofound, 2019). For the employer organisations, the average is 4 per Member State if we consider the employer organisations only. If we also count the business associations, as explained above, the average is 6.4 organisations per Member State, indicating a much higher degree of fragmentation in terms of employer organisations than in most other sectors.

Cyprus, Latvia and Lithuania are considered countries without an employer organisation in this study. However, in each of these countries, employers' interests are represented by at least one organisation, although these organisations are considered business associations, and have no involvement in collective bargaining and social dialogue. In this study, 16 such organisations were identified in Cyprus and 5 such organisations were identified in Lithuania, each representing a different NACE code (e.g. meat processing or beer manufacturing) in the sector. One such organisation was identified in Latvia; it covers most of the sector (excluding NACE codes 10.4, 11.04 and 11.06).

An additional 25 trade unions and 65 employer organisations were identified as sector-related but, owing to their small involvement in the sector, have been classified as having a very minor role in

terms of membership and in the sectoral social dialogue landscape by the Network of Eurofound Correspondents. Thus, these organisations are not analysed or mentioned in the following sections (nor in Table 10). The organisations with a very limited role in the sector include 18 trade unions in Italy, 4 in Portugal and 1 in the Netherlands, and 18 employer organisations in Italy and 3 in Greece. Detailed information about these organisations is available in Annex 2.

Table 10: Number of trade unions/professional associations and employer organisations/business associations in the food and drink sector

Number of trade unions or professional associations in the country										MS	Number of employer organisations or business associations in the country																			
									2	AT	2																			
									6	BE	2																			
									5	BG	6 (6)																			
									4	CY	0 (16)																			
									1	CZ	1																			
									1	DE	7																			
									4	DK	1 (1)																			
									1	EE	1 (10)																			
									4	EL	3 (2)																			
									5	ES	12 (6)																			
									3 (1)	FI	1																			
									5 (1)	FR	15 (8)																			
									3	HR	1																			
									5	HU	1 (5)																			
									4	IE	1																			
									4	IT	8																			
									2	LT	0 (5)																			
									2	LU	1																			
									2	LV	0 (1)																			
									2	MT	1																			
									2	NL	19 (2)																			
									4	PL	1 (2)																			
									8	PT	19																			
									2	RO	1																			
									6	SE	1																			
									1	SI	3																			
									2	SK	4 (1)																			
									90 (2)	EU27	112 (65)																			

Notes: Each cell with green or blue shading represents one sector-related organisation in the respective country. Cells with grey shading represent organisations that have members in the sector but remain out of the scope of this study (i.e. not involved in collective bargaining and not affiliated to EFFAT/FoodDrinkEurope) – these organisations are not included in figures and tables in the rest of the report but are listed in Annex 2.

Source: Network of Eurofound Correspondents' contributions to this study, 2020

Table 11 gives a more detailed view of the number of trade unions and employer organisations in the sector. It shows that all EU27 Member States have trade unions that cover both the food subsector and the drink subsector. Croatia and Ireland also have trade unions that cover only the drink subsector, while 11 countries have trade unions with members in only the food subsector. Of all trade unions, 74% have members in both the food subsector and the drink subsector, 20% have members in only the food subsector and 2% have members in only the drink subsector.

Regarding employer organisations, in each country where a relevant employer organisation exists, there is at least one organisation that covers both the food subsector and the drink subsector, excluding Croatia, which has only one employer organisation covering only the food subsector. Overall, 33% of all employer organisations cover both the food subsector and the drink subsector. Five countries have an employer organisation with members in only the drink subsector, corresponding to 12% of all employer organisations. Only the food subsector is covered by 53% of employer organisations existing in 10 countries.

The higher degree of fragmentation in terms of employer organisations finds an explanation in the higher proportion (53%) of organisations organising only food-producing companies. Among the trade unions, 74% organise workers in both food and drink production.

Table 11: Number of trade unions and employer organisations covering the entire sector, only the food subsector or only the drink subsector

MS	Trade unions that represent workers in food only, in drink only or in both food and drink				Total number of TUs	Employer organisations that represent companies in food only, in drink only or in both food and drink				Total number of EOs
	Food only	Drink only	Both	No information		Food only	Drink only	Both	No information	
AT			2		2			2		2
BE			6		6	1		1		2
BG	1		4		5	5		1		6
CY	1		3		4					0
CZ			1		1			1		1
DE			1		1	5		2		7
DK			2	2	4			1		1
EE			1		1			1		1
EL	3		1		4	1		2		3
ES			5		5	7	4	1		12
FI	1		2		3			1		1
FR			5		5	9	4	1	1	15
HR		1	2		3	1				1
HU	3		2		5			1		1
IE	1	1	2		4			1		1
IT			4		4			8		8
LT	1		1		2					0
LU			2		2			1		1
LV			2		2					0
MT			2		2			1		1
NL			2		2	14	3	2		19
PL	3		1		4			1		1
PT	2		6		8	15	2	2		19

RO			2		2			1		1
SE	1		4	1	6			1		1
SI			1		1			3		3
SK	1		1		2	2	1	1		4
EU27	18	2	67	3	90	60	14	37	1	112
	20%	2%	74%	3%		53%	13%	33%	1%	

Notes: EO, employer organisation; TU, trade union.

Source: Network of Eurofound Correspondents' contributions to this study, 2020

2.1. Coverage, sector-relatedness and organisational density of trade unions

In this section, the sector-relatedness and bargaining strength of trade unions in each Member State and in the EU27 in total are assessed. One relevant factor here is whether a trade union's membership includes affiliates in every part of the food and drink sector. Also relevant is whether it has members in other sectors. Taking this into account, a trade union is categorised as being congruent with the sector or as having an overlapping, a sectional or a sectional overlapping membership domain (see Table 3 and Figure 1 for definitions). The overlapping domains indicate links with other sectors, while sectionalism might contribute to fragmentation (if different trade unions cover different parts of the sector) or pluralism (if different trade unions have similar memberships). Other factors include organisational density, whether all categories of employees (white- and blue-collar workers) are covered, whether employees from all sizes of organisations are covered and whether employees in all parts of the country can be part of the trade union.

Out of the 90 trade unions active in the sector, 35 (39%) organise workers in the whole sector, that is in all 16 activities categorised by NACE codes (see also Table 12 and Figure 11). Nearly one-third of trade unions (28 (31%)) have narrow width – that is, they have members active in 1–5 of these segments. Thirteen trade unions (14%) have medium width, with members active in 6–10 segments. Eleven trade unions (12%) have wider width, covering 11–15 segments in the sector. Trade unions that cover only the food subsector or only the drink subsector typically have narrow width (19 out of 20 trade unions), and in most cases cover only one subsector. Trade unions covering both the food subsector and the drink subsector typically cover all parts of the sector (i.e. full sector coverage).

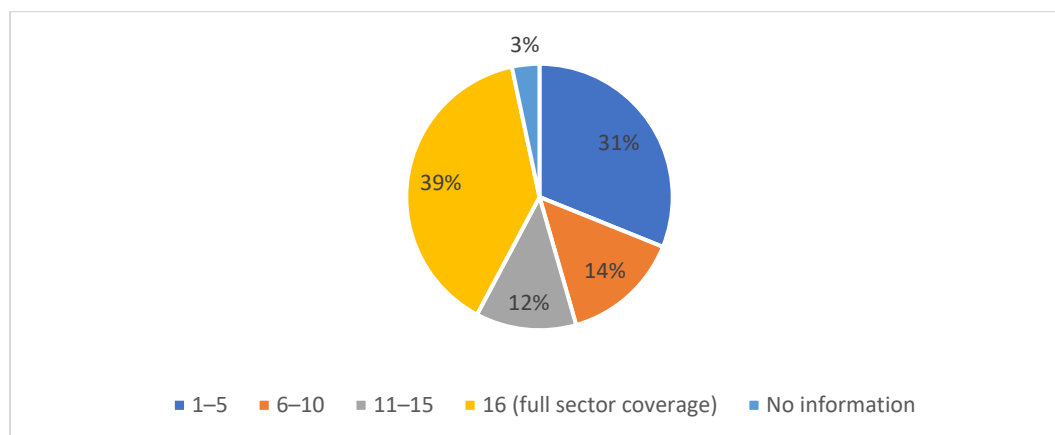
Table 12: Width of trade unions (number of NACE activities), EU27

Number of NACE activities	1–5	6–10	11–15	16 (full sector coverage)	No information
TUs covering only food or only drink	19	1	0	0	0
TUs covering both food and drink	9	12	11	35	3
TUs covering the subsectors in total	28	13	11	35	3

Note: TU, trade union.

Source: Network of Eurofound Correspondents' contributions to this study, 2020

Figure 11: Width of trade unions (number of NACE activities) (%), EU27



Source: Network of Eurofound Correspondents' contributions to this study, 2020

Table 13 shows the number and share of trade unions with members engaged in each of the activities (NACE codes) in the food and drink sector. It shows that 85 out of 90 trade unions (94%) have members at least in the food subsector and 69 trade unions (77%) have members at least in the drink subsector, thus making the food subsector comparatively more important in terms of trade union coverage. However, all Member States have coverage in both the food subsector and the drink subsector. While each food and drink activity is covered by trade unions in the majority of the countries, the only activity covered in all countries is beer manufacturing (NACE 11.05). Other well-covered segments are manufacture of dairy products (NACE 10.5) and manufacture of other food products (NACE 10.8) (both in 26 countries). Malt manufacturing (NACE 11.06), while being a low-importance activity in the sector in terms of the share of employment (second least important activity) and companies (least important activity), is covered by trade unions in 18 countries.

In around half of the countries (14), the trade unions in combination do not cover the entire sector. Out of 16 segments, 13 are not covered by the Estonian trade union, while 11 segments are not covered by Luxembourg's trade unions. In Lithuania, Romania and Slovakia, six segments in each are not covered; the number is four in Malta, three in Bulgaria, Cyprus, Hungary, Ireland and Poland, and one in Czechia, Denmark and Greece.

Table 13: Trade union coverage per segment (number and %), EU27

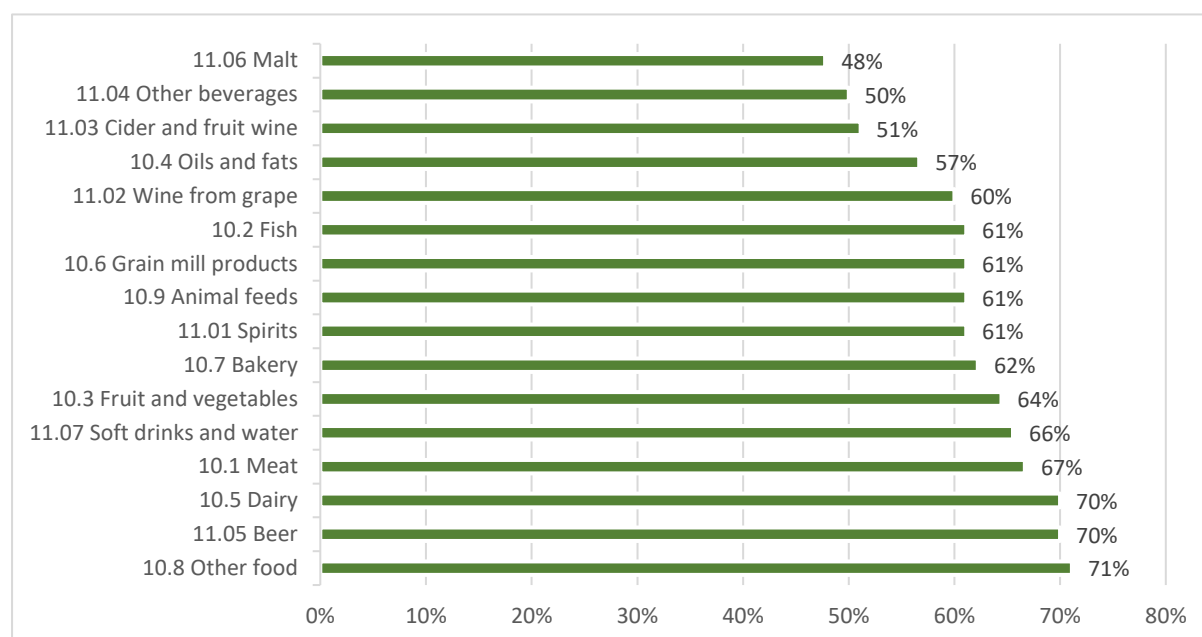
	10.1 Meat	10.2 Fish	10.3 Fruit and vegetables	10.4 Oils and fats	10.5 Dairy	10.6 Grain mill products	10.7 Bakery	10.8 Other food	10.9 Animal feeds	10 FOOD	11.01 Spirits	11.02 Wine from grape	11.03 Cider and fruit wine	11.04 Other beverages	11.05 Beer	11.06 Malt	11.07 Soft drinks and water	11 DRINK	No data available
Number of TUs in segment	60	55	58	51	63	55	56	64	55	85	55	54	46	45	63	43	59	69	3
% of TUs in segment	67	61	64	57	70	61	62	71	61	94	61	60	51	50	70	48	66	77	3
Number of MSs with segment covered by at least one TU	24	22	23	21	26	24	25	26	21	27	25	22	20	19	27	18	25	27	2

Note: No information about sector coverage for three trade unions (two in Denmark and one in Sweden). TU, trade union.

Source: Network of Eurofound Correspondents' contributions to this study, 2020

Considering all the trade unions in the EU27, the parts of the sector most covered by unions are manufacture of other food products (64 trade unions, 71%), manufacture of dairy products (63 trade unions, 70%) and manufacture of beer (63 trade unions, 70%). This does not exactly follow the employment pattern in the sector. For example, manufacture of bakery products employs the largest share of employees, while employees working in beer production form a rather small share. Most parts of the sector are covered by 60–69% of trade unions. Manufacture of oils and fats, manufacture of cider and fruit wine, manufacture of other beverages and manufacture of malt are covered by fewer than 60% of trade unions, which follows the employment trend, as those four activities have the smallest share of employment in the sector. Figure 12 provides an overview of the coverage of each part of the sector by trade unions.

Figure 12: Share of trade unions covering each part of the sector, EU27



Source: Network of Eurofound Correspondents' contributions to this study, 2020

Table 14 gives a detailed overview of the sector coverage of the trade unions in each Member State, indicating which parts of the food and drink sector their members are engaged in, while also showing their affiliation to EFFAT and involvement in collective bargaining. This provides a more detailed view of the information given above.

Table 14: Sector coverage of trade unions

MS	Trade union	Parts of the sector organised																	Affiliation to EFFAT	Involvement in collective bargaining
		10.1 Meat	10.2 Fish	10.3 Fruit and vegetables	10.4 Oils and fats	10.5 Dairy	10.6 Grain mill products	10.7 Bakery	10.8 Other food	10.9 Animal feeds	10 FOOD	11.01 Spirits	11.02 Wine from grape	11.03 Cider and fruit wine	11.04 Other beverages	11.05 Beer	11.06 Malt	11.07 Soft drinks and water	11 DRINK	
AT	PRO-GE																			
	GPA-DJP																			
BE	ACLVB-CGSLB																			
	ACV Voeding en Diensten																			
	ABVV-FGTB Horval																			
	ABVV-FGTB BBTK SETCa																			
	ACV-CSC Puls																			
	ACV-CSC CNE																			
BG	FNSZ/ΦHC3																			
	FSOHP/ΦCOXΠ																			
	FHPP/ΦXΠΠ																			
	SBHN/СБХН																			
	NSFTKTU/HCΦ TKTY																			
CY	SEBETTYK-PEO																			
	OBIK-SEK																			
	Segdamelin-PEO																			
	OMEPEGE-SEK																			
CZ	NOS PPP																			
DE	NGG																			

MS	Trade union	Parts of the sector organised																	Affiliation to EFFAT	Involvement in collective bargaining
		10.1 Meat	10.2 Fish	10.3 Fruit and vegetables	10.4 Oils and fats	10.5 Dairy	10.6 Grain mill products	10.7 Bakery	10.8 Other food	10.9 Animal feeds	10 FOOD	11.01 Spirits	11.02 Wine from grape	11.03 Cider and fruit wine	11.04 Other beverages	11.05 Beer	11.06 Malt	11.07 Soft drinks and water	11 DRINK	
DK	NNF																			
	3F																			
	HK Handel	Covers most sectors because it organises white-collar workers in administrative roles																		
	CO-industri ⁸	No data available (covers at least meat (poultry) and fish)																		
EE	ETTAF																			
EL	POEUGTP																			
	POEK																			
	POEET																			
	OEXBE																			
ES	FI-CCOO																			
	UGT-FICA																			
	ELA																			
	CIG – FGAMT																			
	FI-USO																			
FI	SEL																			
	MVL																			
	PRO																			
FR	FGA-CFDT																			
	FGTA-FO																			
	CFTC-CSFV																			
	FNAF-CGT																			
	CFE-CGC AGRO																			

⁸ EFFAT reports that CO-industri is not to be considered a sectoral trade union. It is a cartel of trade unions in the industrial domain. It supports trade unions to reach collective agreements and assists in international and European work. It is affiliated to EFFAT through 3F (industry group).

MS	Trade union	Parts of the sector organised																	Affiliation to EFFAT	Involvement in collective bargaining
		10.1 Meat	10.2 Fish	10.3 Fruit and vegetables	10.4 Oils and fats	10.5 Dairy	10.6 Grain mill products	10.7 Bakery	10.8 Other food	10.9 Animal feeds	10 FOOD	11.01 Spirits	11.02 Wine from grape	11.03 Cider and fruit wine	11.04 Other beverages	11.05 Beer	11.06 Malt	11.07 Soft drinks and water	11 DRINK	
HR	PPDIV																			
	NSR PHP																			
	NSZP																			
HU	EMFSZ																			
	HDSZ																			
	ÉDSZ																			
	MEDOSZ																			
	GMDSZ																			
IE	SIPTU																			
	GSU																			
	Connect TU																			
	DEA																			
IT	FAI-CISL																			
	FLAI-CGIL																			
	UILA-UIL																			
	UGL Agroalimentare																			
LT	LMP																			
	LZUDPSF																			
LU	LCGB																			
	OGB-L																			
LV	LIA																			
	LLPNA																			
MT	GWU																			
	UHM																			

MS	Trade union	Parts of the sector organised																	Affiliation to EFFAT	Involvement in collective bargaining
		10.1 Meat	10.2 Fish	10.3 Fruit and vegetables	10.4 Oils and fats	10.5 Dairy	10.6 Grain mill products	10.7 Bakery	10.8 Other food	10.9 Animal feeds	10 FOOD	11.01 Spirits	11.02 Wine from grape	11.03 Cider and fruit wine	11.04 Other beverages	11.05 Beer	11.06 Malt	11.07 Soft drinks and water	11 DRINK	
NL	FNV																			
	CNV Vakmensen																			
PL	SPS NSZZ																			
	FZZPM																			
	FZZPC																			
	FZZPPS																			
PT	SETAAB																			
	FESAHT																			
	CESP																			
	Sindepescas																			
	Sitese																			
	Sinticaba																			
	Union of Professionals in Dairy, Food, Agriculture, Offices, Trade, Services, Road Transport, Metalworking, Construction and Woodworking																			
	Union of Workers in Manufacturing and Commerce of Meat of the South																			
RO	CERES																			
	Sindalimenta																			

MS	Trade union	Parts of the sector organised																	Affiliation to EFFAT Involvement in collective bargaining			
		10.1 Meat	10.2 Fish	10.3 Fruit and vegetables	10.4 Oils and fats	10.5 Dairy	10.6 Grain mill products	10.7 Bakery	10.8 Other food	10.9 Animal feeds	10 FOOD	11.01 Spirits	11.02 Wine from grape	11.03 Cider and fruit wine	11.04 Other beverages	11.05 Beer	11.06 Malt	11.07 Soft drinks and water			11 DRINK	
SE	HRF	No data available																				
	Handels																					
	Livs																					
	Unionen																					
	Sveriges Ingenjörer																					
	Ledarna																					
SI	S KŽI																					
SK	OZP SR																					
	OZPP SR																					
EU 27	Number of TUs	61	55	58	51	63	55	56	64	55	85	55	54	46	45	63	43	59	69	54	89	
	% of TUs	67	61	64	57	70	61	62	71	61	94	61	60	51	50	70	48	66	77	60	99	
	Number of MSs	25	22	23	21	26	24	25	26	21	27	25	22	20	19	27	18	25	27	25	27	

Notes: Coloured shading denotes a positive response. Dark green shading indicates that the trade union covers at least one segment of the food or drink subsector. TU, trade union.

Source: Network of Eurofound Correspondents' contributions to this study, 2020

The assessment of organisational density considered the employment level in the sector and the number of sectoral trade union members. The latter as a percentage of the former is the share of trade union members among the total workforce in the sector (i.e. the membership density), as shown in Table 15 for each Member State. These are rough estimations, because Eurostat data on employment were combined with available data from the Network of Eurofound Correspondents on trade union membership, neither of which are comprehensive. Nevertheless, there are 20 Member States for which all trade unions provided membership data. The seven Member States for which no data or only incomplete data were provided are Belgium, Denmark, France, Italy, Lithuania, the Netherlands and Sweden.

Table 15: Organisational density of trade unions in Member States

Member State	Employment in sector	Number of TUs covered by membership data	Number of TU members in sector	Membership density (%)
AT	82,300	All	12,100	14.7
BE	117,200	3 out of 6 (50%)	52,185	44.5
BG	107,200	All	3,799	3.5
CY	125,900	All	2,554	2.0
CZ ⁹	10,300	All	7,173	69.6
DE	862,600	All	200,000	23.2
DK	57,900	2 out of 4 (50%)	>30,500	>52.0
EE	15,000	All	18	0.1
EL	132,600	All	<36,350	<27.0
ES	520,600	All	236,374	45.4
FI	37,800	All	34,300	90.7
FR	679,100	1 out of 5 (20%)	>10,000	>1.5
HR	66,900	All	12,900	19.3
HU	143,500	All	7,126	5.0
IE	55,700	All	16,100	28.9
IT	504,100	None	0	0.0
LT	40,400	1 out of 2 (50%)	80	0.2
LU	2,700	All	1,884	69.8
LV	22,700	All	977	4.3
MT	5,300	All	4,720	89.1
NL	130,400	1 out of 2 (50%)	18,944	14.5
PL	513,800	All	15,539	3.0
PT	118,400	All	13,005	11.0
RO	221,800	All	32,380	14.6
SE	49,400	5 out of 6 (83%)	34,827	70.5
SI	22,300	All	>2,500	>11.0
SK	56,700	All	2,645	4.7

Notes: Trade union density is a rough estimation owing to incomplete data about trade union membership. The grey rows are those for which no or not all trade unions provided information on their membership strength in the sector. The unshaded rows are those for which all trade unions provided density data. TU, trade union.

Sources: Employment – Eurostat, Labour Force Survey, 2019 (data for the drink subsector from 2018 were used for Latvia and Sweden); trade union membership data – Network of Eurofound Correspondents' contributions to this study, 2020

Table 16 presents details of trade unions' membership domains, the types of workers they have as members, whether they have the most important (largest) companies' employees as members and whether they are affiliated to cross-sector unions.

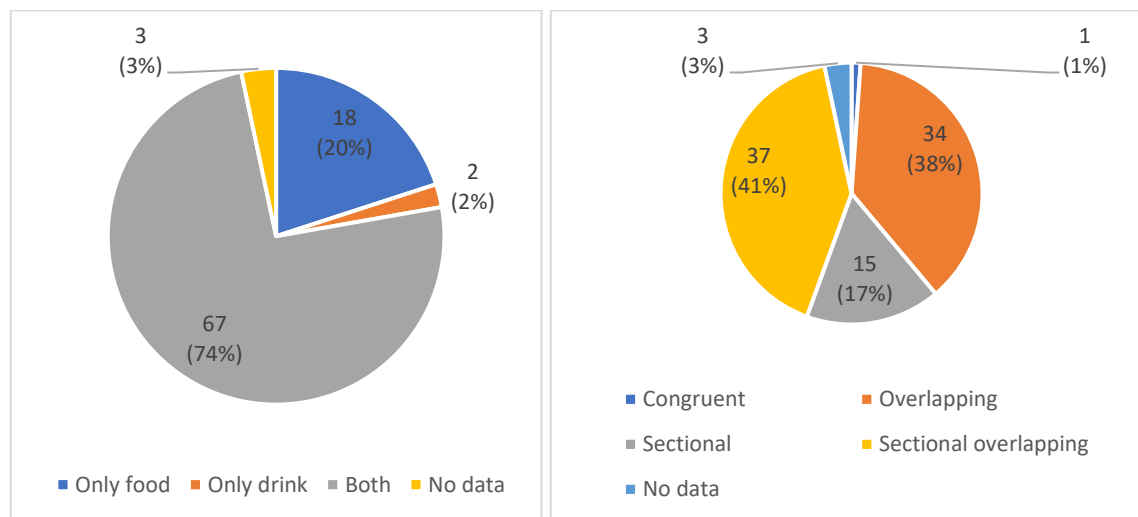
Figure 13 shows two aspects of the EU27 trade unions' membership domains. The left-hand part of the figure shows the subsectors covered by trade unions within the food and drink sector. It shows

⁹ EFFAT believes the numbers could be higher for Czechia. However, the stated numbers are those reported by the trade unions to the Network of Eurofound Correspondents.

that the majority of the trade unions in the sector cover both the food subsector and the drink subsector. One-fifth of trade unions cover only food subsector employees, while a very small share of trade unions represent only drink subsector employees. The right-hand part of the figure shows the overall domain types, including beyond the food and drink sector, of the trade unions.

Typically, the trade unions cover only parts of the food and drink sector and also have members in other sectors, thus having a 'sectional overlapping' domain (41%). Another typical case is when trade unions cover the whole food and drink sector and also have members in other sectors, thus being 'overlapping' in their domain (38%). The domains of 17% of trade unions are 'sectional' – they have no members in other sectors and do not cover the food and drink sector fully. Only one trade union is fully concentrated on the food and drink sector and does not cover any other sectors, thus having a 'congruent' domain (Livs in Sweden). Combining the 'congruent' and 'overlapping' domains gives the total number of trade unions covering the whole sector in question. In the food and drink sector, there are 35 (39%) such trade unions. Combining trade unions with 'overlapping' and 'sectional overlapping' domains gives the number of trade unions that also cover sectors beyond the sector in question. In food and drink, most of the trade unions (71 unions; 79% of the total) have members in other sectors. Many trade unions cover both agriculture and the food subsector. Looking at trade unions with members in only the food and drink sector (i.e. those with congruent or sectional domains), it can be seen that only 16 (18%) trade unions are exclusively food and drink sector trade unions, indicating that the food and drink sector is closely related to other sectors (see further information about other sectors in Section 2.7).

Figure 13: Membership domains of trade unions, EU27



Source: Network of Eurofound Correspondents' contributions to this study, 2020

As can be seen in Table 16, most of the trade unions (77%) cover both blue- and white-collar workers. Thus, around one-quarter of trade unions are specific to either manual workers (blue-collar workers) or specialists and management (white-collar workers). This is the case for at least some trade unions in Austria, Belgium, Denmark, Finland, Greece and Sweden. The vast majority of trade unions welcome members from all regions of the country (88%). Still, in a number of countries – Belgium, Bulgaria, Croatia, Hungary, Ireland, Portugal and Spain – some trade unions concentrate on specific areas (e.g.

the southern region of Portugal and the Galicia region and Basque Country in Spain). Slightly more than half (61%) of the trade unions have members in the largest companies in the sector. The majority of trade unions (88%) are members of a higher-level cross-industry trade union in the country. Out of the 55 trade unions covering large companies' workers, 48 also have cross-industry affiliation.

Table 16: Types of coverage and cross-industry affiliation of trade unions

MS	Trade union	Width of domain (number of subsectors covered)	Covers only food, only drink or both	Membership domain type	Covers blue- or white-collar workers	Covers all regions	Covers the largest companies in the sector	Cross-industry affiliation
AT	PRO-GE	16	Both	Overlapping	Blue	Yes	n.d.	Austrian Trade Union Federation (ÖGB)
	GPA-DJP	16	Both	Overlapping	White	Yes	n.d.	ÖGB
BE	ACLVB-CGSLB	16	Both	Overlapping	Both	Yes	No	
	ACV Voeding en Diensten	16	Both	Overlapping	Blue	Yes	Yes	ACV-CSC
	ABVV-FGTB Horval	16	Both	Overlapping	Blue	Yes	Yes	ABVV-FGTB
	ABVV-FGTB BBTK SETCa	16	Both	Overlapping	White	Yes	Yes	ABVV-FGTB
	ACV-CSC Puls	16	Both	Overlapping	White	Yes	Yes	ACV-CSC
	ACV-CSC CNE	16	Both	Overlapping	White (French speaking)	No	Yes	ACV-CSC
BG	FNSZ/ΦHCЗ	3	Only food	Sectional overlapping	Both	Yes	No	Confederation of Independent Trade Unions of Bulgaria (CITUB)
	FSOHP/ΦCOXΠ	7	Both	Sectional overlapping	Both	Yes	No	CITUB
	FHPP/ΦXΠΠ	5	Both	Sectional overlapping	Both	Yes	Yes	(Confederation of Labour Podkrepa (Podkrepa CL)
	SBHN/СБХН	5	Both	Sectional	Both	Yes	Yes	CITUB
	NSFTKTU/HCΦTKTY	3	Both	Sectional overlapping	Both	No	Yes	CITUB

Representativeness of the European social partner organisations: Food and drink sector

MS	Trade union	Width of domain (number of subsectors covered)	Covers only food, only drink or both	Membership domain type	Covers blue- or white-collar workers	Covers all regions	Covers the largest companies in the sector	Cross-industry affiliation
CY	SEBETTYK-PEO	13	Both	Sectional overlapping	Both	Yes	Yes	Pancyprian Federation of Labour (PEO)
	OBIK-SEK	13	Both	Sectional overlapping	Both	Yes	Yes	Cyprus Workers Confederation (SEK)
	Segdamelin-PEO	7	Both	Sectional overlapping	Both	Yes	Yes	PEO
	OMEPEGE-SEK	8	Only food	Sectional overlapping	Both	Yes	Yes	SEK
CZ	NOS PPP	15	Both	Sectional overlapping	Both	Yes	Yes	Czech-Moravian Confederation of Trade Unions (ČMKOS)
	OSPZV – ASO ČR ¹⁰							
DE	NGG	16	Both	Overlapping	Both	Yes	n.d.	DGB

¹⁰ EFFAT questioned whether OSPZV – ASO ČR could also be considered a sectoral trade union in Czechia. According to EFFAT, this trade union mainly organises agricultural workers but may also organise workers in primary production of food. However, the information provided by the trade union indicates that it organises only agricultural workers and not food and drink sector employees.

Representativeness of the European social partner organisations: Food and drink sector

MS	Trade union	Width of domain (number of subsectors covered)	Covers only food, only drink or both	Membership domain type	Covers blue- or white-collar workers	Covers all regions	Covers the largest companies in the sector	Cross-industry affiliation
DK	NNF	6	Both	Sectional	Blue	Yes	Yes	Danish Trade Union Confederation (FH)
	3F	12	Both	Sectional overlapping	Blue	Yes	Yes	FH
	HK Handel ¹¹	0	n.d.	n.d.	White	Yes	Yes	FH
	CO-industri ¹²	0	n.d.	n.d.	Both	Yes	No	
EE	ETTAF	3	Both	Sectional overlapping	Both	Yes	No	Estonian Trade Union Confederation
EL	POEUGTP	9	Both	Sectional overlapping	Both	Yes	Yes	Greek General Confederation of Labour (GSEE)
	POEK	1	Only food	Sectional	Blue	Yes	No	GSEE
	POEET	3	Only food	Sectional overlapping	Both	Yes	No	GSEE
	OEXBE	3	Only food	Sectional overlapping	Blue	Yes	No	GSEE

¹¹ HK Handel covers the clerical, commercial and information technology workers in the food and drink sector. Thus, its domain cannot be categorised according to the activities defined by NACE codes.

¹² EFFAT reports that CO-industri is not to be considered a sectoral trade union. See footnote 8.

Representativeness of the European social partner organisations: Food and drink sector

MS	Trade union	Width of domain (number of subsectors covered)	Covers only food, only drink or both	Membership domain type	Covers blue- or white-collar workers	Covers all regions	Covers the largest companies in the sector	Cross-industry affiliation
ES	FI-CCOO	16	Both	Overlapping	Both	Yes	Yes	Confederacion Sindical (CCOO)
	UGT-FICA	16	Both	Overlapping	Both	Yes	Yes	Union General de Trabajadores (UGT)
	ELA	14	Both	Sectional overlapping	Both	No (only Basque Country)	No	No
	CIG – FGAMT	9	Both	Sectional overlapping	Both	No (only Galicia region)	Yes	No
	FI-USO	8	Both	Sectional overlapping	Both	Yes	Yes	Union Sindical Obrera (USO)
FI	SEL	16	Both	Overlapping	Blue	Yes	n.d.	Central Organisation of Finnish Trade Unions (SAK)
	MVL	1	Only food	Sectional	White	Yes	n.d.	Finnish Confederation of Professionals (STTK)
	PRO	16	Both	Overlapping	White	Yes	n.d.	STTK

Representativeness of the European social partner organisations: Food and drink sector

MS	Trade union	Width of domain (number of subsectors covered)	Covers only food, only drink or both	Membership domain type	Covers blue- or white-collar workers	Covers all regions	Covers the largest companies in the sector	Cross-industry affiliation
FR	FGA-CFDT	16	Both	Overlapping	Both	Yes	Yes	CDFT
	FGTA-FO	16	Both	Overlapping	Both	Yes	Yes	Force Ouvrière (FO)
	CFTC-CSFV	16	Both	Overlapping	Both	Yes	Yes	CFTC
	FNAF-CGT	16	Both	Overlapping	Both	Yes	Yes	CGT
	CFE-CGC AGRO	16	Both	Overlapping	Both (but mainly white)	Yes	Yes	CGE-CGC
HR	PPDIV	16	Both	Overlapping	Both	Yes	Yes	
	NSR PHP	2	Both	Sectional	Both	Yes (but currently only one company)	No	Independent Trade Unions of Croatia (NHS)
	NSZP	1	Only drink	Sectional	Both	No one region	No	NHS

Representativeness of the European social partner organisations: Food and drink sector

MS	Trade union	Width of domain (number of subsectors covered)	Covers only food, only drink or both	Membership domain type	Covers blue- or white-collar workers	Covers all regions	Covers the largest companies in the sector	Cross-industry affiliation
HU	EMFSZ	1	Only food	Sectional	Both	No	Yes	LIGA
	HDSZ	3	Only food	Sectional overlapping	Both (excluding management)	Yes	Yes	MASZSZ
	ÉDSZ	7	Both	Sectional overlapping	Both	No	Yes	MASZSZ
	MEDOSZ	8	Both	Sectional overlapping	Both	Yes	No	LIGA
	GMDSZ	3	Only food	Sectional	Both	Yes	No	MASZSZ
IE	SIPTU	13	Both	Sectional overlapping	Both	Yes	Yes	Irish Congress of Trade Unions
	GSU	1	Only drink	Sectional	Both	No	Yes	Irish Congress of Trade Unions
	Connect TU	13	Both	Sectional	Both	No	No	Irish Congress of Trade Unions
	DEA	1	Only food	Sectional	Both	No	Yes	Irish Congress of Trade Unions
IT	FAI-CISL	16	Both	Overlapping	Both	Yes	Yes	Confederazione Italiana Sindacati Lavoratori (CISL)
	FLAI-CGIL	16	Both	Overlapping	Both	Yes	Yes	Confederazione Generale Italiana del Lavoro (CGIL)
	UILA-UIL	16	Both	Overlapping	Both	Yes	Yes	Unione Italiana del Lavoro (UIL)
	UGL Agroalimentare	16	Both	Overlapping	Both	Yes	No	General Labour Union (UGL)
LT	LMP	9	Both	Sectional overlapping	Both	Yes	Yes	Lithuanian Trade Union Confederation
	LZUDPSF	1	Only food	Sectional overlapping	Both	Yes	No	Lithuanian Trade Union Confederation

Representativeness of the European social partner organisations: Food and drink sector

MS	Trade union	Width of domain (number of subsectors covered)	Covers only food, only drink or both	Membership domain type	Covers blue- or white-collar workers	Covers all regions	Covers the largest companies in the sector	Cross-industry affiliation
LU	LCGB	5	Both	Sectional overlapping	Both	Yes	Yes	
	OGB-L	5	Both	Sectional overlapping	Both	Yes	Yes	
LV	LIA	16	Both	Overlapping	Both	Yes	Yes	Free Trade Union Confederation of Latvia
	LLPNA	9	Both	Sectional overlapping	Both	Yes	Yes	Free Trade Union Confederation of Latvia
MT	GWU	12	Both	Sectional overlapping	Both	Yes	Yes	
	UHM	4	Both	Sectional overlapping	Both	Yes	Yes	
NL	FNV	16	Both	Overlapping	Both (but mainly blue)	Yes	Yes	Is cross-sector itself
	CNV Vakmensen	16	Both	Overlapping	Both (but mainly blue)	Yes	Yes	Is cross-sector itself
PL	SPS NSZZ	13	Both	Sectional overlapping	Both	Yes	Yes	NSZZ Solidarność
	FZZPM	1	Only food	Sectional	Both	Yes	No	OPZZ
	FZZPC	2	Only food	Sectional	Both	Yes	No	OPZZ
	FZZPPS	1	Only food	Sectional	Both	Yes	No	OPZZ

Representativeness of the European social partner organisations: Food and drink sector

MS	Trade union	Width of domain (number of subsectors covered)	Covers only food, only drink or both	Membership domain type	Covers blue- or white-collar workers	Covers all regions	Covers the largest companies in the sector	Cross-industry affiliation
PT	SETAAB	15	Both	Sectional overlapping	Both	Yes	Yes	UGT
	FESAHT	16	Both	Overlapping	Both	Yes	Yes	CGTP
	CESP	16	Both	Overlapping	Both	Yes	No	CGTP
	Sindepescas	2	Only food	Sectional overlapping	Both	Yes	No	UGT
	Sitese	16	Both	Overlapping	Both	Yes	No	UGT
	Sinticaba	16	Both	Overlapping	Both	Yes	No	No
	Union of Professionals in Dairy, Food, Agriculture, Offices, Trade, Services, Road Transport, Metalworking, Construction and Woodworking	16	Both	Overlapping	Both	Yes	No	No
	Union of Workers in Manufacturing and Commerce of Meat of the South	1	Only food	Sectional overlapping	Both	No (only southern Portugal)	No	CGTP
RO	CERES	5	Both	Sectional overlapping	Both (lower management and below)	Yes	No	Cartel alfa
	Sindalimenta	10	Both	Sectional	Both	Yes	Yes	Confederația Generală a Muncii – Uniunea Generală a Sindicatelor din România (CGM – UGSR)

Representativeness of the European social partner organisations: Food and drink sector

MS	Trade union	Width of domain (number of subsectors covered)	Covers only food, only drink or both	Membership domain type	Covers blue- or white-collar workers	Covers all regions	Covers the largest companies in the sector	Cross-industry affiliation
SE	HRF	0	n.d.	n.d.	Blue	Yes	No	Swedish Trade Union Confederation (LO)
	Handels	1	Only food	Sectional overlapping	Blue	Yes	No	LO
	Livs	16	Both	Congruent	Blue	Yes	Yes	LO
	Unionen	14	Both	Sectional overlapping	White (private sector)	Yes	Yes	Swedish Confederation of Professional Employees (TCO)
	Sveriges Ingenjörer	16	Both	Overlapping	White	Yes	Yes	Swedish Confederation of Professional Associations (Saco)
	Ledarna	16	Both	Overlapping	White (managers only)	Yes	Yes	
SI	S KŽI	16	Both	Overlapping	Both	Yes	Yes	Association of Free Trade Unions of Slovenia (ZSSS)
SK	OZP SR	10	Both	Sectional overlapping	Both	Yes	Yes	KOZ SR
	OZPP SR	1	Only food	Sectional overlapping	Both	Yes	No	KOZ SR

Representativeness of the European social partner organisations: Food and drink sector

MS	Trade union	Width of domain (number of subsectors covered)	Covers only food, only drink or both				Membership domain type				Covers blue- or white-collar workers			Covers all regions		Covers the largest companies in the sector			Cross-industry affiliation		
EU27			Only food: 18 (20%)	Only drink: 2 (2%)	Both: 67 (74%)	n.d.: 3 (3%)	Congruent: 1 (1%)	Sectional: 15 (17%)	Overlapping: 34 (38%)	Sectional overlapping: 37 (41%)	n.d.: 3 (3%)	Blue: 11 (12%)	White: 10 (11%)	Both: 69 (77%)	Yes: 79 (88%)	No: 11 (12%)	Yes: 55 (61%)	No: 29 (32%)	n.d.: 6 (7%)	Yes: 79 (88%)	No: 11 (12%)

Note: n.d., no data available.

Source: Network of Eurofound Correspondents' contributions to this study, 2020

2.2. Involvement of trade unions in collective bargaining

The previous section considered the sector-relatedness and membership of the trade unions in the food and drink sector. This section will assess their involvement in collective bargaining. Table 17 shows whether the trade unions are involved in single-employer (company-level) or multi-employer (sector-level) collective bargaining, which parts of the sector are covered by collective bargaining and the share of the sectoral workforce covered by collective agreements.

In all Member States, at least one trade union is involved in collective bargaining in the sector. Only one trade union – out of the 90 looked at in this study – is not involved in collective bargaining (Trade Union Federation of Lithuanian Agricultural Workers (LZUDPSF)).

Table 17: Involvement of trade unions in collective bargaining, social dialogue and public policy

MS			Parts of the sector organised																						
Trade union	AT	PRO-GE	Both																			Total collective bargaining coverage	Involvement in social dialogue: bipartite, tripartite or both	Consultations on sector-related matters by the government	
	BE	GPA-DJP	Both																			100%	Both	Regular	
		ACLVB-CGSLB	Both																			100%	Bipartite	Regular	
			ACV Voeding en Diensten	Both																			100%	Bipartite	Regular
				ABVV-FGTB Horval	Both																			100%	Bipartite
	ABVV-FGTB BBTk SETCa	Both																			100%	Bipartite	Regular		
	ACV-CSC Puls	Both																			100%	Bipartite	Regular		
	ACV-CSC CNE	Both																			100%	Bipartite	Regular		
	BG	FNSZ/ΦHC3	Comp.																			10% (100% in NACE 11.05 and 11.06)	Tripartite	Regular	
FSOHP/ΦCOXΠ	Comp.																			10% (100% in NACE 11.05 and 11.06)	Both	Regular			
FHPP/ΦXΠΠ	Both																			10% (100% in NACE 11.05 and 11.06)	Both	Ad hoc			
SBHN/CEXH	Both																			10% (100% in NACE 11.05 and 11.06)	Tripartite	Regular			
NSFTKTU/HCΦTKTV	Comp.																			10% (100% in NACE 11.05 and 11.06)	Tripartite	Ad hoc			

	MS		Parts of the sector organised																						
		Trade union	Collective bargaining: company level, sector level or both																						
				10.1 Meat	10.2 Fish	10.3 Fruit and vegetables	10.4 Oils and fats	10.5 Dairy	10.6 Grain mill products	10.7 Bakery	10.8 Other food	10.9 Animal feeds	10 FOOD	11.01 Spirits	11.02 Wine from grape	11.03 Cider and fruit wine	11.04 Other beverages	11.05 Beer	11.06 Malt	11.07 Soft drinks and water	11 DRINK				
CY		SEBETTYK-PEO	Comp.																			19% ¹³			
		OBIEK-SEK	Comp.																						
		Segdamelin-PEO	Comp.																						
		OMEPEGE-SEK	Comp.																						
CZ		NOS PPP	Comp.																			38%	Both	Ad hoc	
DE		NGG	Both																			>50%	Bipartite	Ad hoc	
DK		NNF	Both																			80–85%	Tripartite	Regular	
		3F	Both																				Tripartite	Yes	
		HK Handel	Both																				Tripartite	Regular	
		CO-industri ¹⁴	Sector																				Tripartite	n.d.	
EE		ETTAF	Comp.																			n.d.		Ad hoc	
EL		POEUGTP	Sector																			40% (rough estimate)			
		POEK	Sector																					Ad hoc	
		POEET	Sector																				Both	Ad hoc	
		OEXBE	Sector																						
ES		FI-CCOO	Both																			98%	Bipartite	Ad hoc	
		UGT-FICA	Both																				Bipartite	Ad hoc	
		ELA	Both																						
		CIG – FGAMT	Both																						
		FI-USO	Both																				Bipartite	Ad hoc	
FI		SEL	Sector																			92%	Bipartite	n.d.	
		MVL	Both																				Bipartite	Ad hoc	
		PRO	Sector																				Bipartite	Ad hoc	

¹³ EFFAT considers this remarkably low for a country with collective bargaining and extension mechanisms (the application of agreements to workers and companies that are not affiliated to the social partners responsible for their negotiation, whether trade unions or employer organisations).

¹⁴ EFFAT reports that CO-industri is not to be considered a sectoral trade union. See footnote 8.

Representativeness of the European social partner organisations: Food and drink sector

MS	Trade union	Collective bargaining: company level, sector level or both	Parts of the sector organised																	Total collective bargaining coverage	Involvement in social dialogue: bipartite, tripartite or both	Consultations on sector-related matters by the government		
			10.1 Meat	10.2 Fish	10.3 Fruit and vegetables	10.4 Oils and fats	10.5 Dairy	10.6 Grain mill products	10.7 Bakery	10.8 Other food	10.9 Animal feeds	10 FOOD	11.01 Spirits	11.02 Wine from grape	11.03 Cider and fruit wine	11.04 Other beverages	11.05 Beer	11.06 Malt	11.07 Soft drinks and water				11 DRINK	
FR	FGA-CFDT	Both																			100%	Both	Ad hoc	
	FGTA-FO	Both																				Both	Ad hoc	
	CFTC-CSFV	Both																				Both	Ad hoc	
	FNAF-CGT	Both																				Both	Ad hoc	
	CFE-CGC AGRO	Both																				Both	Ad hoc	
HR	PPDIV	Comp.																			75%	Bipartite	Ad hoc	
	NSR PHP	Comp.																						
	NSZP	Comp.																						
HU	EMFSZ	Comp.																			30–40%	Bipartite		
	HDSZ	Comp.																						
	ÉDSZ	Comp.																				Bipartite		
	MEDOSZ	Comp.																				Bipartite	Ad hoc	
	GMDSZ	Comp.																				Bipartite	Ad hoc	
IE	SIPTU	Comp.																			9% (rough estimate)		Ad hoc	
	GSU	Comp.																						
	Connect TU	Comp.																						
	DEA	Comp.																					Ad hoc	
IT	FAI-CISL	Both																			100%	Bipartite	Ad hoc	
	FLAI-CGIL	Both																				Bipartite	Ad hoc	
	UILA-UIL	Both																				Bipartite	Ad hoc	
	UGL Agro-alimentare	Sector																				Bipartite	Ad hoc	
LT	LMP	Comp.																			n.d.	Both	Ad hoc	
	LZUDPSF																						Ad hoc	
LU	LCGB	Comp.																			50–55%			
	OGB-L	Comp.																						
LV	LIA	Both																			10%	Bipartite	Ad hoc	
	LLPNA	Both																				Bipartite	Ad hoc	
MT	GWU	Both																			100%	Both	Ad hoc	
	UHM	Comp.																				Both	Ad hoc	
NL	FNV	Both																			90%	Both	Regular	
	CNV Vakmensen	Both																				Both	Regular	
PL	SPS NSZZ	Comp.																			<10 %	Both	Regular	
	FZZPM	Comp.																				Both	Regular	

Representativeness of the European social partner organisations: Food and drink sector

MS		Trade union	Collective bargaining: company level, sector level or both	Parts of the sector organised																	Total collective bargaining coverage	Involvement in social dialogue: bipartite, tripartite or both	Consultations on sector-related matters by the government	
				10.1 Meat	10.2 Fish	10.3 Fruit and vegetables	10.4 Oils and fats	10.5 Dairy	10.6 Grain mill products	10.7 Bakery	10.8 Other food	10.9 Animal feeds	10 FOOD	11.01 Spirits	11.02 Wine from grape	11.03 Cider and fruit wine	11.04 Other beverages	11.05 Beer	11.06 Malt	11.07 Soft drinks and water				11 DRINK
	FZZPC	Comp.																				63%	Both	Regular
	FZZPPS	Comp.																					Both	Regular
PT	SETAAB	Both																				9%		Ad hoc
	FESAHT	Both																					n.d.	
	CESP	Sector																					n.d.	
	Sindepescas	Sector																					n.d.	
	Sitese	Both																					n.d.	
	SinticaBa	Both																					n.d.	
	Union of Professionals in Dairy, Food, Agriculture, Offices, Trade, Services, Road Transport, Metal-working, Construction and Wood-working	Both																					n.d.	
	Union of Workers in Manufacturing and Commerce of Meat of the South	Sector																					n.d.	
RO	CERES	Comp.																			9%			
	Sindalimenta	Both																				Both	Regular	
SE	HRF	Sector																				>90%	n.d.	n.d.
	Handels	Sector																					Bipartite	
	Livs	Sector																					Bipartite	Ad hoc
	Unionen	Both																					Bipartite	Ad hoc
	Sveriges Ingenjörer	Sector																					Bipartite	Ad hoc
	Ledarna	Sector																					Bipartite	Ad hoc
SI	S KŽI	Both																			80%	Both	Ad hoc	
SK	OZP SR	Both																			40%		Yes	
	OZPP SR	Comp.																					Yes	

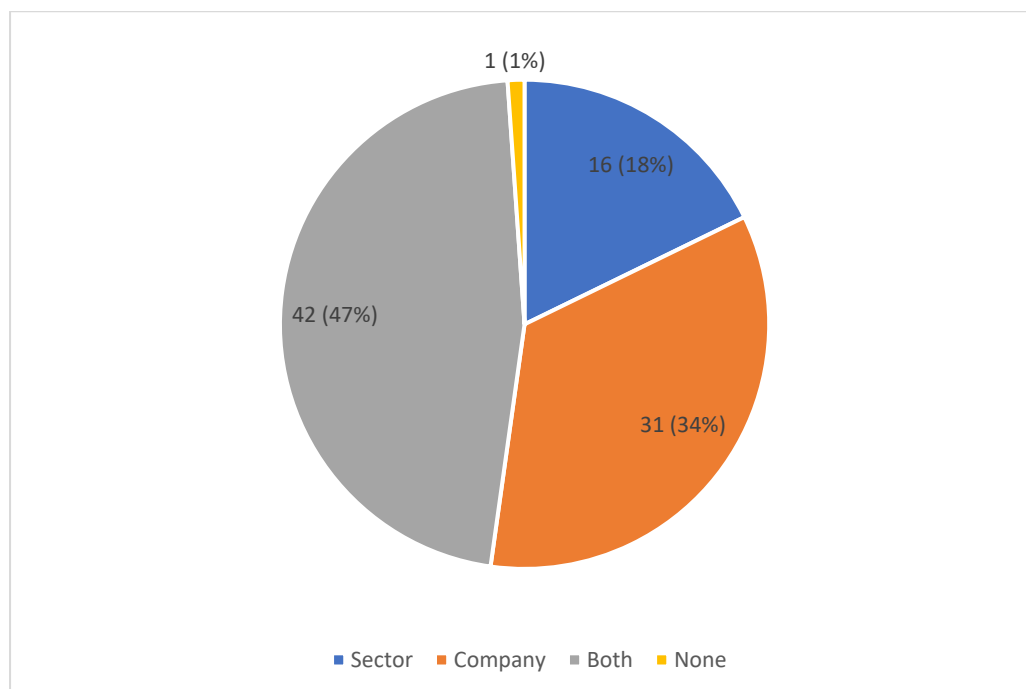
MS	Trade union	Collective bargaining: company level, sector level or both	Parts of the sector organised																	Total collective bargaining coverage	Involvement in social dialogue: bipartite, tripartite or both	Consultations on sector-related matters by the government	
			10.1 Meat	10.2 Fish	10.3 Fruit and vegetables	10.4 Oils and fats	10.5 Dairy	10.6 Grain mill products	10.7 Bakery	10.8 Other food	10.9 Animal feeds	10 FOOD	11.01 Spirits	11.02 Wine from grape	11.03 Cider and fruit wine	11.04 Other beverages	11.05 Beer	11.06 Malt	11.07 Soft drinks and water				11 DRINK
EU27	Comp.: 31 (34%)	53 (59%) 48 (53%) 53 (59%) 43 (48%) 58 (64%) 52 (58%) 52 (58%) 60 (67%) 47 (52%) 81 (90%) 50 (56%) 49 (54%) 41 (46%) 39 (43%) 58 (64%) 41 (46%) 56 (62%) 66 (73%)																					
	Sector: 18 (28%)																						
	Both: 42 (47%)																						
	Total: 89 (99%)																						

Notes: Light green shading denotes a positive response. Dark green shading indicates collective bargaining covering at least one subsector (food or drink). Cells with no shading indicate lack of coverage or involvement. n.d., no data available.

Source: Network of Eurofound Correspondents' contributions to this study, 2020

Almost half of the trade unions are involved in both sector- and company-level collective bargaining. Overall, however, company-level bargaining is more important than sector-level bargaining as, in total, 81% of trade unions are involved in only company-level bargaining or in both company- and sector-level bargaining. A total of 65% of trade unions are involved in sector-level bargaining (only sector-level bargaining or both company- and sector-level bargaining). Trade unions engaged in only sector-level bargaining are present in six Member States (Denmark, Finland, Greece, Italy, Portugal and Sweden). In all of these countries except Greece, the other trade unions are engaged in both sector- and company-level bargaining. None of the trade unions in these countries is engaged in only company-level bargaining. In 13 Member States, there are trade unions involved in company-level bargaining only. In four of these (Bulgaria, Malta, Romania and Slovakia), there are also trade unions that are engaged in both company- and sector-level bargaining. However, none of the trade unions in these 13 countries is engaged exclusively in sector-level bargaining. See also Table 17 and Figure 14.

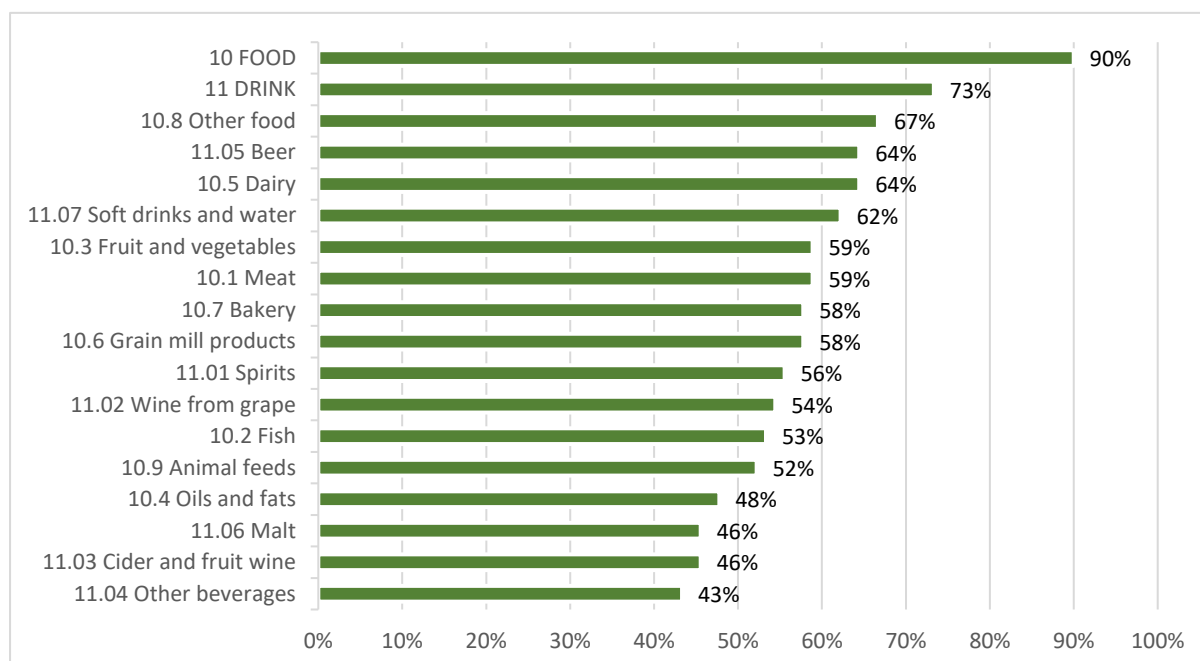
Figure 14: Involvement of trade unions in different forms of collective bargaining, EU27



Source: Network of Eurofound Correspondents' contributions to this study, 2020

Figure 15 shows the proportions of sectoral trade unions engaged in collective bargaining covering different parts of the sector. Manufacture of other food products (67% of trade unions), beer (64%), dairy products (64%) and soft drinks and water (62%) are the fields of activity in which the most collective agreements are signed – these are also the parts of the sector most covered by trade unions. Fewer than half of trade unions are engaged in collective bargaining with regard to manufacture of oils and fats (48%), malt (46%), cider and fruit wine (46%) and other beverages (43%).

Figure 15: Proportion of trade unions engaged in collective bargaining covering different parts of the sector, EU27



Source: Network of Eurofound Correspondents' contributions to this study, 2020

Table 17 above shows the proportion of the workforce covered by collective agreements (total collective bargaining coverage). This information is gathered from the Network of Eurofound Correspondents and includes rough estimations from the countries for which such information and estimations were provided. It is evident from the available data that bargaining coverage varies drastically between countries, from less than 10% to 100%. Higher coverage (at least 75%) was recorded in Austria, Belgium, Croatia, Denmark, Finland, France, Italy, Malta, the Netherlands, Slovenia, Spain and Sweden. Medium coverage (21–74%) was recorded in Czechia, Germany, Greece, Hungary, Luxembourg, Portugal and Slovakia. Low coverage (20% or less) was reported for Bulgaria, Cyprus, Ireland, Latvia, Poland and Romania. Data are not available for Estonia and Lithuania.

2.3. Coverage, sector-relatedness and organisational density of employer organisations

In this section, the sector-relatedness and strength of employer organisations in each Member State and in the EU27 in total are assessed. One factor in this is whether an employer organisation's membership includes affiliates in each part of the food and drink sector. Also important is whether it has members in other sectors. Taking this into account, an organisation is categorised as being congruent with the sector or as having an overlapping, a sectional or a sectional overlapping membership domain (see Table 3 and Figure 1 for definitions). The overlapping domains indicate links with other sectors, while sectionalism might contribute to fragmentation (if different organisations cover different parts of the sector) or pluralism (if different organisations have similar memberships). Other factors include the organisational density, whether all company categories (in terms of size and type) are covered and whether employers in all parts of the country can be part of the organisation.

Overall, 112 employer organisations were considered sector-related and relevant for the analysis. Out of those, 21 (20%) organise across the whole sector (i.e. have member companies active in all food and drink fields of activity). Most commonly, employer organisations have narrow width in terms of segments: 72 (67%) employer organisations cover 1–5 segments. In most of these cases (69), the employer organisation covers only food or only drink subsector segments, but not both. The remaining 14% of the organisations divide equally between medium (6–10 segments) and wide (11–15) widths. In contrast to trade unions, narrow width is more common among employer organisations, irrespective of whether they cover the food subsector, the drink subsector or both. Therefore, employer organisations tend to be more concentrated on specific fields of activity. Table 18 and Figure 16 provide more details.

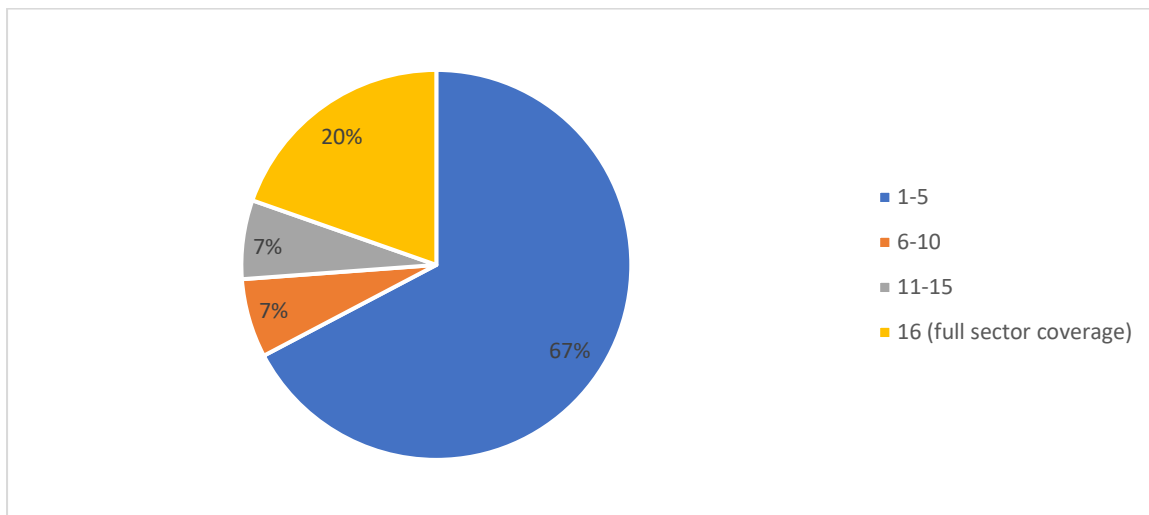
Table 18: Width of employer organisations (number of NACE activities), EU27

Number of NACE activities	1–5	6–10	11–15	16 (full sector coverage)
EOs covering only food or only drink	69	1	0	0
EOs covering both food and drink	3	6	7	21
EOs covering the subsectors in total	72	7	7	21

Note: EO, employer organisation.

Source: Network of Eurofound Correspondents' contributions to this study, 2020

Figure 16: Width of employer organisations (number of NACE activities) (%), EU27



Source: Network of Eurofound Correspondents' contributions to this study, 2020

A more detailed view of the parts of the sector covered by the employer organisations is presented in Table 19. It shows that the food subsector is more important than the drink subsector for employer organisations, as 87% of employer organisations cover at least the food subsector (i.e. might cover

drink as well), while at least the drink subsector is covered by 46% of organisations. There are three Member States without food subsector coverage and four without drink subsector coverage. The countries with neither food nor drink subsector coverage are Cyprus, Latvia and Lithuania. For these countries, no employer organisations are included in the analysis of this study because of their minor role in the sector's social dialogue and collective bargaining (see Annex 2). Croatia is the other country without an employer organisation covering the drink subsector.

Overall, all food and drink sector parts are covered in the majority of countries, with manufacture of bakery products, meat processing, manufacture of dairy products and manufacture of soft drinks and water being the most important in the EU27. The least important are manufacture of malt and manufacture of cider and fruit wine, which are also least important in terms of the number of companies. There are 11 countries whose employer organisations in combination do not cover parts of the sector. In Hungary, only one activity is covered (manufacture of bakery products), while in Slovakia 12 out of the 16 activities are not covered (those covered are meat processing, manufacture of other food products, manufacture of beer and manufacture of malt). In Bulgaria, 8 out of the 16 activities are not covered. The number is 6 in Hungary and Luxembourg, 5 in Poland, 4 in Greece and Portugal, 3 in Estonia and Ireland, and 2 in Malta.

Table 19: Employer organisation coverage per segment (number and %), EU27

	10.1 Meat	10.2 Fish	10.3 Fruit and vegetables	10.4 Oils and fats	10.5 Dairy	10.6 Grain mill products	10.7 Bakery	10.8 Other food	10.9 Animal feeds	10 FOOD	11.01 Spirits	11.02 Wine from grape	11.03 Cider and fruit wine	11.04 Other beverages	11.05 Beer	11.06 Malt	11.07 Soft drinks and water	11 DRINK	No data available
Number of EOs in segment	45	32	39	33	42	37	51	47	33	93	31	28	26	28	31	26	43	49	1
% of EOs in this segment	48	34	42	31	35	40	55	51	35	100	63	57	53	57	63	53	87	100	<1
Number of MSs with segment covered by at least one EO	23	16	21	19	23	22	24	22	20	24	19	16	15	17	19	15	23	23	1 ^(FR)

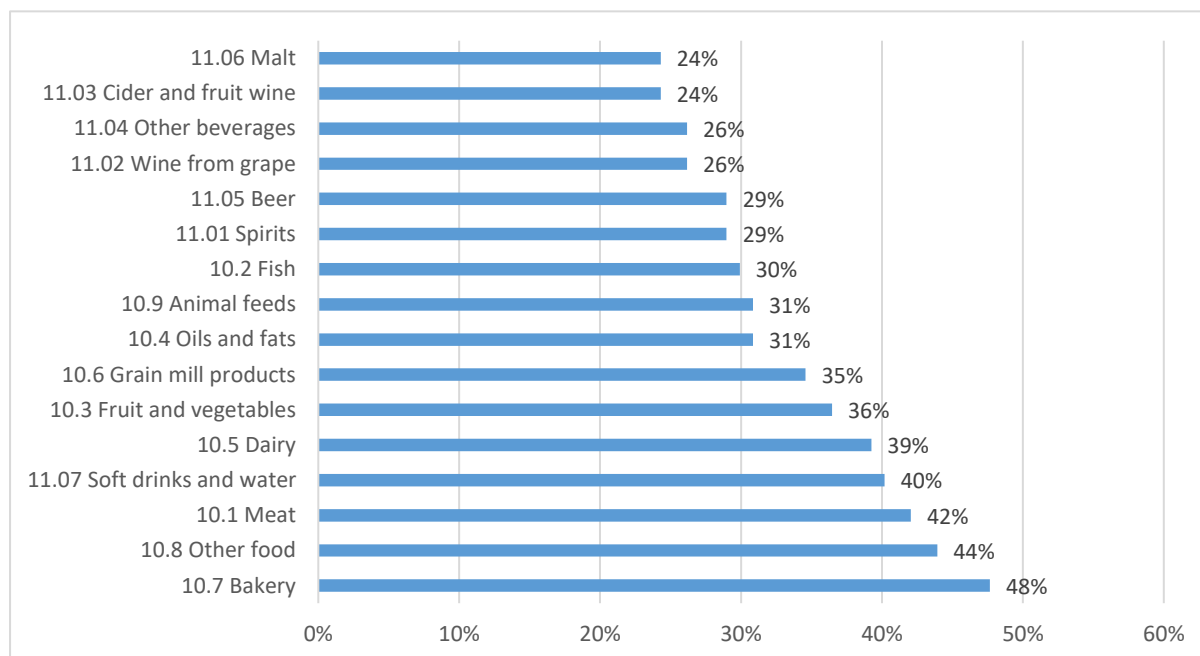
Notes: No data on the sector coverage for one employer organisation (FEDALIM) from France. EO, employer organisation.

Source: Network of Eurofound Correspondents' contributions to this study, 2020

Looking at individual employer organisations in the EU27, Figure 17 shows that the most important fields of activity in respect to employer organisation coverage in the sector are manufacture of bakery products (covered by 51 organisations, 48%), manufacture of other food products (47 organisations, 44%), meat processing (45 organisations, 42%) and manufacture of soft drinks and water (43

organisations, 40%). This largely follows the trend in the number of companies, as three of those segments are the segments with the highest numbers of companies in the EU27. Least important are manufacture of malt and manufacture of cider and fruit wine (both 26 organisations, 24%).

Figure 17: Share of employer organisations covering each part of the sector, EU27



Source: Network of Eurofound Correspondents' contributions to this study, 2020

The information provided above is given in more detail in [Table 21](#), which indicates which parts of the sector are organised by each of the employer organisations, while also providing information about their affiliation to the European-level social partner organisation FoodDrinkEurope and their involvement in collective bargaining.

Shading is used in Table 21 to indicate the umbrella organisations and their members, which exist in Belgium, France, Germany, Greece, the Netherlands, Portugal and Spain. Dark green shading denotes umbrella organisations, while light green shading indicates organisations' affiliations to an umbrella organisation in the respective country (Table 20). The umbrella organisations cover a wide range of food and drink activities through their affiliated subsector organisations, with the membership of some umbrella organisations also including companies directly involved in several food and drink activities. The affiliated subsector organisations may be involved in organising for a very specific type of food and drink production, and in collective bargaining for these specific activities either directly or through the umbrella organisation.

Table 20: Umbrella organisations and affiliated sectoral organisations in the food and drink sector

Member State	Umbrella organisations	Sectoral or subsectoral employer organisations affiliated to the umbrella organisation
BE	Federation of the Food Industry (FEVIA)	Federation of Large Bakeries of Belgium (FGBB)
DE	Lebensmittelverband Deutschland (Food Federation Germany)	Federal Association of the German Confectionery Industry (BDSI), Sugar Industry Association (VdZ), German Federation of Bakers (VdG), German Bakers' Confederation (ZDB)
EL	Hellenic Federation of Enterprises (SEV) (cross-industry)	Federation of Hellenic Food Industries (SEVT)
ES	Spanish Food and Drink Industry Federation (FIAB)	ANICE (meat industry), Fenaval (vegetable processing and processed foods), AFHSE (flour millers' association), Conxemar (fish products and aquaculture), CESFAC (compound feed for animals), Produlce (confectionery, cocoa, chocolate and fine bakery), FENIL (dairy industry), ANEABE (bottled water), FEV (wine federation), Anfabra (soft drinks association), FIAB (brewers)
FR	National Association of the Food and Drink Industry (ANIA)	Alliance 7 (fruit, vegetables, dairy, grain mill products, bakery), FNIL (dairy industry), AEG (ice cream), Culture Viande (beef), FEDEV (meat trades), FICT (butchers, caterers, delicatessens), ANMF (milling), BRP (soft drinks), ABF (brewers), FEDALIM (umbrella organisation), CSEM (mineral waters), SNSF (sugar), SNIPO (egg industrialists)
NL	Federation of Dutch Foodstuff Industry (FNLI)	VAVI (potato processing), NZO (dairy), VIGEF (vegetable and fruit processing), FWS (soft drinks, water and juices), AKSV (cookware and snacks)
PT	Federation of Portuguese Agri-Food Industry (FIPA)	Ancipa (traders and industrialists of food products), Casa do Azeite (olive oil), ANIL (dairy), APIM (grain processing and pasta), ANIA (rice), AICC (coffee), IACA (animal feed processing), APIAM (mineral water)

Source: Network of Eurofound Correspondents' contributions to this study, 2020

Table 21: Sector coverage of employer organisations/business associations

MS	Employer organisation/ business association	Parts of the sector covered																	Affiliation to FoodDrinkEurope	Involvement in collective bargaining
		10.1 Meat	10.2 Fish	10.3 Fruit and vegetables	10.4 Oils and fats	10.5 Dairy	10.6 Grain mill products	10.7 Bakery	10.8 Other food	10.9 Animal feeds	10.10 FOOD	11.01 Spirits	11.02 Wine from grape	11.03 Cider and fruit wine	11.04 Other beverages	11.05 Beer	11.06 Malt	11.07 Soft drinks and water		
AT	FVNG																			
	BILG																			
BE	FEVIA																			
	FGBB																			
BG	SHNB/СХНБ																			
	SPZZP/СПЗЗП																			
	SPKF/СПКФ																			
	AMB/АМБ																			
	SPB/СПБ																			

MS	Employer organisation/ business association	Parts of the sector covered																	Affiliation to FoodDrinkEurope	Involvement in collective bargaining
		10.1 Meat	10.2 Fish	10.3 Fruit and vegetables	10.4 Oils and fats	10.5 Dairy	10.6 Grain mill products	10.7 Bakery	10.8 Other food	10.9 Animal feeds	10 FOOD	11.01 Spirits	11.02 Wine from grape	11.03 Cider and fruit wine	11.04 Other beverages	11.05 Beer	11.06 Malt	11.07 Soft drinks and water		
	NBPS/НБПС																			
CZ	PK ČR																			
DE	ANG																			
	DFV																			
	Lebensmittelverband Deutschland																			
	BDSI																			
	VdZ																			
	Verband deutscher Großbäckereien																			
	Zentralverband des Deutschen Bäckerhandwerks																			
DK	DI																			
EE	ETL																			
EL	SEV																			
	SEVT																			
	GSEVEE																			
ES	FIAB																			
	ANICE																			
	Fenaval																			
	AFHSE																			
	Conxemar																			
	CESFAC																			
	Produlce																			
	FENIL																			
	ANEABE																			
	FEV																			
	Anfabra																			
	CdE (brewers)																			
FI	ETL																			
FR	ANIA																			
	Alliance 7																			
	FNIL																			
	Culture Viande																			
	FEDEV																			
	FICT																			
	ANMF																			
	BRF																			

MS	Employer organisation/ business association	Parts of the sector covered																	Affiliation to FoodDrinkEurope	Involvement in collective bargaining
		10.1 Meat	10.2 Fish	10.3 Fruit and vegetables	10.4 Oils and fats	10.5 Dairy	10.6 Grain mill products	10.7 Bakery	10.8 Other food	10.9 Animal feeds	10 FOOD	11.01 Spirits	11.02 Wine from grape	11.03 Cider and fruit wine	11.04 Other beverages	11.05 Beer	11.06 Malt	11.07 Soft drinks and water		
	ABF																			
	FDALIM	No data available																		
	CSEM																			
	SNSF																			
	SNIPO																			
	Adepale																			
	CVNVS																			
HR	HUP UPIIP																			
HU	FÉSZ																			
IE	IBEC																			
IT	Federalimentare																			
	Confartigianato Alimentazione																			
	CNA Alimentare																			
	Casartigiani																			
	CLAAI																			
	Legacoop Agroalimentare																			
	Agrital – AGCI																			
	Fedagri-Confcooperative																			
LU	FIAL																			
MT	MEA																			
NL	FNLI																			
	NZO																			
	VIGEF																			
	FWS																			
	AKSV																			
	COV																			
	VBZ																			
	Gemzu																			
	NEPLUVI																			
	NEVEDI																			
	NBOV																			
	NVB																			
	KVNW																			
	SpiritsNL																			
	VisNed																			
	VNV (fish)																			

MS	Employer organisation/ business association	Parts of the sector covered																	Affiliation to FoodDrinkEurope	Involvement in collective bargaining	
		10.1 Meat	10.2 Fish	10.3 Fruit and vegetables	10.4 Oils and fats	10.5 Dairy	10.6 Grain mill products	10.7 Bakery	10.8 Other food	10.9 Animal feeds	10 FOOD	11.01 Spirits	11.02 Wine from grape	11.03 Cider and fruit wine	11.04 Other beverages	11.05 Beer	11.06 Malt	11.07 Soft drinks and water			11 DRINK
MS	VNV (meat)																				
	COV																				
	VAVI (potato)																				
	VAVI (potato)																				
PL ¹⁵	PFPZ																				
PT	FIPA																				
	Ancipa																				
	Casa do Azeite																				
	ANIL																				
	APIM																				
	ANIA																				
	AICC																				
	IACA																				
	APIAM																				
	Ancave																				
	ITA																				
	ALIF																				
	ANICP																				
	AIT																				
	ACIP																				
	AIPAN																				
	AIPL																				
	Asimpala																				
	ADCP																				
RO	Romalimenta																				
SE	Li																				
SI	GZS – ZKŽP																				
	ZZS																				
	ZDS																				
SK	PKS																				
	SCS																				
	SZVPS																				
	ZVLal																				
EU27	Number of EOs/BAs	45	32	39	33	42	37	51	47	33	93	31	28	26	28	31	26	43	49	25	94

¹⁵ EFFAT reported another two trade unions from Poland (ZP PPS and ZP PRW). However, it was not confirmed that they have members in the food and drink sector (i.e. that they are in the scope of this study).

MS	Employer organisation/ business association	Parts of the sector covered																			
		10.1 Meat	10.2 Fish	10.3 Fruit and vegetables	10.4 Oils and fats	10.5 Dairy	10.6 Grain mill products	10.7 Bakery	10.8 Other food	10.9 Animal feeds	10 FOOD	11.01 Spirits	11.02 Wine from grape	11.03 Cider and fruit wine	11.04 Other beverages	11.05 Beer	11.06 Malt	11.07 Soft drinks and water	11 DRINK	Affiliation to FoodDrinkEurope	Involvement in collective bargaining
	% of EOs/BAs	42	30	36	31	39	35	48	44	31	87	29	26	24	26	29	24	40	46	23	88
	Number of MSs	23	16	21	19	23	22	24	22	20	24	19	16	15	17	19	15	23	23	23	18

Notes: Coloured shading denotes a positive response. Dark blue shading indicates the organisation covers at least one subsector (food or drink). Dark green shading denotes umbrella organisations. Light green shading denotes the member organisations of the umbrella organisation. BA, business association; EO, employer organisation.

For Germany, ANG and DFV are themselves not involved in collective bargaining for the entire country; rather, their regional member organisations undertake collective bargaining at regional level (Länder). For Spain, CdE is engaged in collective bargaining indirectly through FIAB. For the Netherlands, VAVI is shaded yellow, as it is not a direct member of FoodDrinkEurope, but it is affiliated indirectly through FNLI.

The organisations that are members of FoodDrinkEurope are national 'umbrella' federations that organise, in each country, different subsectors and specific activities or types of products. For example, FIAB is the national 'umbrella' federation of Spain. The sectoral associations (ANICE, Produlce, etc. – marked in light green) are members of FIAB. Therefore, the organisations in this table cannot be considered in isolation, as they are interlinked. Not viewing them collectively risks double counting the membership of the umbrella organisations and their subsectoral member organisations.

Source: Network of Eurofound Correspondents' contributions to this study, 2020

The organisational density of the employer organisations is assessed in two ways: first, in terms of companies covered, showing the number of employer organisation members as a share of the total number of companies in each country, and, second, in terms of workforce covered, showing the affiliated companies' employment level as a share of the total employment level in each country in the sector. As in the case of trade union density, here too the densities are estimations calculated on the basis of the available data provided by the Network of Eurofound Correspondents. Table 22 provides a detailed overview of the data.

In terms of companies covered, the density of employer organisations does not typically exceed 21%. The exceptions are Germany, where at least 46.7% of sectoral companies are organised by employer organisations, Italy, where the density is up to 78.5%, Croatia, with a density of 30%, and the Netherlands, with up to 30% of organisations covered. The density is 10–21% in eight countries, and below 10% in 10 countries. For five countries, not enough information was available for calculations.

In terms of workforce covered, the data are missing for seven countries. In Austria, Estonia, Finland, Greece, Slovenia and Sweden, the density is 75% or above, reaching 92% in Austria and 97% in Sweden. At the same time, the employer organisations cover around 5% to over 19% of companies in those countries, indicating that a large share of the workforce is concentrated in this small share of companies. In Italy and Romania, the density in terms of workforce is 6% and 10%, respectively. In the

other 12 countries, the density varies between 23% and 70%. In those countries, there is no clear link between the density in terms of companies and in terms of workforce.

Table 22: Organisational density of employer organisations in Member States

MS	Density in terms of companies covered				Density in terms of employees covered			
	Number of companies in sector	Number of EOs covered by membership data	Number of EO members in the sector	Membership density (%)	Employment in sector	Number of EOs covered by employees' data	Employees covered by EOs	Employment density (%)
AT	3,959	All	>200	>5.1	82,300	All	75,750	92
BE	7,214	All	700	9.7	117,200	None	n.d.	n.d.
BG	6,262	All	492	7.9	107,200	All	28,596	27
CY	10,324	None	n.d.	n.d.	125,900	None	n.d.	n.d.
CZ	930	All	156	16.8	10,300	None	n.d.	n.d.
DE	23,531	3 out of 5 (60%)	>11,000	>46.7	862,600	3 out of 5 (60%)	>321,200	>37
DK	1,635	All	60	3.7	57,900	All	17,300	30
EE	737	All	100	13.6	15,000	All	12,000	80
EL	16,432	1 out of 3 (33%)	2,400	14.6	132,600	1 out of 3 (33%)	112,710	85
ES	28,212	10 out of 11 (91%)	2,363	8.4	520,600	6 out of 11 (55%)	164,750	31
FI	1,749	All	270	15.4	37,800	All	28,350	75
FR	55,141	14 out of 15 (93%)	2,173	3.9	679,100	14 out of 15 (93%)	271,026	40
HR	3,248	All	974	30.0	66,900	All	40,140	60
HU	6,787	All	>500	>7.4	143,500	None	n.d.	n.d.
IE	1,966	None	n.d.	n.d.	55,700	All	38,990	70
IT	55,890	3 out of 8 (38%)	<43,860	<78.5	504,100	1 out of 8 (13%)	30,246	6
LT	1,626	None	n.d.	n.d.	40,400	None	n.d.	n.d.
LU	157	All	17	10.8	2,700	None	n.d.	n.d.
LV	1,190	None	n.d.	n.d.	22,700	None	n.d.	n.d.
MT	354	All	14	4.0	5,300	All	2,675	50
NL	6,611	15 out of 17 (88%)	<1,985	<30	130,400	9 out of 17 (53%)	67,055	51
PL	15,154	None	n.d.	n.d.	513,800	All	118,174	23
PT	11,212	14 out of 19 (74%)	2,347	20.9	118,400	18 out of 19 (95%)	44,586	38
RO	9,134	All	26	0.3	221,800	All	22,180	10
SE	4,461	All	800	17.9	49,400	All	48,000	97

Representativeness of the European social partner organisations: Food and drink sector

SI	2,479	All	483	19.5	22,300	1 out of 3 (33%)	19,178	86
SK	3,907	All	48	1.2	56,700	All	14,742	26

Notes: *Density is a rough estimation owing to incomplete data about membership. Data of umbrella organisations are not included to avoid double reporting as their membership data are included by their member organisations. EO, employer organisation; n.d., no data available.*

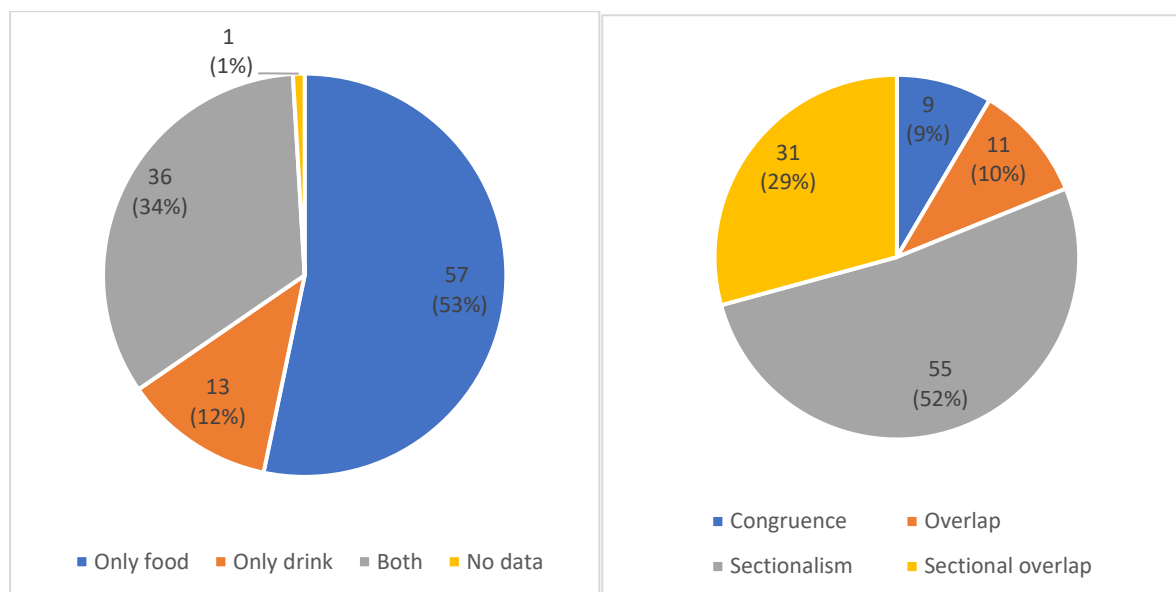
Sources: *Number of companies – Eurostat, Structural Business Statistics, 2017 (data from 2013 and 2014 were used for Ireland and data from 2013, 2016 and 2018 were used for Malta); employment – Eurostat, Labour Force Survey, 2019 (data from 2018 were used for Latvia and Sweden); membership and number of employees covered – Network of Eurofound Correspondents’ contributions to this study, 2020*

The following assessment covers membership domain, the type of companies the employer organisations have as members, whether they have the most important (largest) companies as members and whether they are affiliated to cross-industry organisations.

Figure 18 aids understanding of the membership domains of the employer organisations. The left-hand part of the figure shows the domains of the organisations within the food and drink sector. It shows that the majority of the employer organisations cover only the food subsector (57 organisations, 53%). Both the food subsector and the drink subsector are covered by 36 organisations (34%), while 13 organisations (12%) cover only the drink subsector.

The right-hand part of the figure shows the overall domain types, including beyond the food and drink sector, of the employer organisations. The employer organisations typically cover only parts of the sector. Fifty-five organisations (52%) cover only parts of the food and drink sector (thus having a ‘sectional’ domain), while 31 organisations (29%) cover parts of the food and drink sector and also have members in other sectors (thus having a ‘sectional overlapping’ domain). Overall, 86 employer organisations (80%) – those two domain types combined – cover only parts of the food and drink sector. Eleven organisations (10%) have an ‘overlapping’ domain, indicating that they cover not only the entire food and drink sector but also other sectors. Combining this domain with ‘sectional overlapping’ reveals that 42 organisations (39%) have members from outside the food and drink sector. Nine organisations (8%) have members active in only the food and drink sector and thus have a ‘congruent’ domain. The entire sector is covered by a total of 20 organisations (19%) (congruent or overlapping domain), which indicates – similarly to the case of trade unions – that the food and drink sector is closely related to other sectors (see further information about other sectors in Section 2.7).

Figure 18: Membership domains of employer organisations, EU27



Source: Network of Eurofound Correspondents' contributions to this study, 2020

Further details of the employer organisations' coverage are provided in Table 23, which shows, in addition to the width and type of membership domain, the types of companies the organisations cover, whether they cover all regions, and the largest companies and whether they are affiliated to cross-industry organisations in their country.

A total of 88 employer organisations (82%) have member companies of all sizes and types. Other organisations specialise either by size of company (large, medium-sized or small companies, or SMEs) or by type of company (e.g. cooperatives). All the employer organisations cover the entire country, so there is no regional specialisation. There are 19 countries with at least one employer organisation covering the largest companies (see Table 8). Some 44% of organisations are affiliated to national cross-industry employer organisations.

Table 23: Types of coverage and cross-industry affiliation of employer organisations

MS	Employer organisation	Width of domain (number of subsectors covered)	Covers only food, only drink or both	Membership domain type	Type of companies covered	Covers all regions	Covers the largest companies in the sector	Cross-industry affiliation
AT	FVNG	13	Both	Sectional	Large industrial companies	Yes	n.d.	Federal Economic Chamber (WKO)
	BILG	12	Both	Sectional	Smaller companies	Yes	n.d.	WKO
BE	FEVIA	16	Both	Congruent	All	Yes	Yes	
	FGBB	1	Only food	Sectional	Large bakeries	Yes	Yes	
BG	SHNB/CXHБ	5	Both	Sectional overlapping	All	Yes	No	Bulgarian Industrial Association (BIA), Confederation of Employers and Industrialists in Bulgaria (CEIBG)
	SPZZP/СПЗЗП	1	Only food	Sectional	All	Yes	No	BIA
	SPKF/СПКФ	1	Only food	Sectional	All	Yes	No	BIA
	AMB/АМБ	1	Only food	Sectional	All	Yes	No	BIA
	SPB/СПБ	2	Only food	Sectional	All	Yes	Yes	BIA, CEIBG, Bulgarian Chamber of Commerce and Industry (BCCI)
	NBPS/НБПС	1	Only food	Sectional overlapping	All	Yes	No	BCCI
CZ	PK ČR	16	Both	Congruent	All	Yes	Yes	
DE	Lebensmittelverband Deutschland	16	Both	Overlapping	All	Yes	n.d.	
	BDSI	2	Only food	Sectional	All	Yes	n.d.	Food Federation Germany (BVE) (formerly BLL)
	VdZ	1	Only food	Sectional	All	Yes	n.d.	ANG, BDI, BDA, BVE, VIK
	Verband deutscher Großbäckereien	1	Only food	Sectional	Large industrial bakeries	Yes	n.d.	BVE

Representativeness of the European social partner organisations: Food and drink sector

MS	Employer organisation	Width of domain (number of subsectors covered)	Covers only food, only drink or both	Membership domain type	Type of companies covered	Covers all regions	Covers the largest companies in the sector	Cross-industry affiliation
	Zentralverband des Deutschen Bäckerhandwerks	1	Only food	Sectional	All	Yes	n.d.	German Confederation of Skilled Crafts (ZDH), BVE, among others
DK	DI	16	Both	Overlapping	All	Yes	Yes	Confederation of Danish Employers (DA)
EE	ETL	13	Both	Sectional	All	Yes	Yes	Estonian Employers Confederation
EL	SEV	12	Both	Sectional overlapping	All	Yes	Yes	
	SEVT	12	Both	Sectional overlapping	All	Yes	Yes	SEV
	GSEVEE	3	Only food	Sectional overlapping	SMEs	Yes	No	
ES	FIAB	16	Both	Congruent	All	Yes	No	
	ANICE	1	Only food	Sectional	All	Yes	Yes	Meat interprofessional associations (ASICI, INTERPORC, INTEROVIC, PROVACUNO)
	Fenaval	2	Only food	Sectional	All	Yes	No	
	AFHSE	1	Only food	Sectional	All	Yes	No	
	Conxemar	1	Only food	Sectional overlapping	All	Yes	Yes	
	CESFAC	1	Only food	Sectional	All	Yes	No	
	Produlce	2	Only food	Sectional	All	Yes	Yes	
	FENIL	1	Only food	Sectional	All	Yes	No	
	ANEABE	1	Only drink	Sectional	All	Yes	No	
	FEV	1	Only drink	Sectional	All	Yes	Yes	
	Anfabra	1	Only drink	Sectional	All	Yes	Yes	
FI	ETL	16	Both	Congruent	All	Yes	n.d.	Confederation of Finnish Industries (EK)
FR	ANIA	16	Both	Congruent	All	Yes	Yes	MEDEF
	Alliance 7	5	Only food	Sectional	All	Yes	No	
	FNIL	1	Only food	Sectional	All	Yes	No	

Representativeness of the European social partner organisations: Food and drink sector

MS	Employer organisation	Width of domain (number of subsectors covered)	Covers only food, only drink or both	Membership domain type	Type of companies covered	Covers all regions	Covers the largest companies in the sector	Cross-industry affiliation
	Culture Viande	1	Only food	Sectional overlapping	All	Yes	No	
	FEDEV	1	Only food	Sectional overlapping	All	Yes	No	
	FICT	2	Only food	Sectional	All	Yes	No	
	ANMF	1	Only food	Sectional	All	Yes	No	
	BRF	1	Only drink	Sectional	All	Yes	No	
	ABF	1	Only drink	Sectional	All	Yes	No	
	FEDALIM	n.d.	n.d.	n.d.	All	Yes	No	
	CSEM	1	Only drink	Sectional	All	Yes	No	
	SNSF	1	Only food	Sectional	All	Yes	No	
	SNIPO	1	Only food	Sectional	All	Yes	No	
	Adepale	6	Only food	Sectional	All	Yes	No	
	CVNVS	4	Only drink	Sectional overlapping	All	Yes	No	
HR	HUP UPIIP	1	Only food	Sectional overlapping	All	Yes	Yes	Croatian Employers' Association (CEA)
HU	FÉSZ	9	Both	Sectional	All	Yes	No	MGYOSZ
IE	IBEC	13	Both	Sectional overlapping	All	Yes	Yes	
IT	Federalimentare	16	Both	Congruent	All	Yes	Yes	Confindustria
	Confartigianato Alimentazione	16	Both	Overlapping	Mostly SMEs	Yes	No	Confartigianato, Rete Imprese Italia
	CNA Alimentare	16	Both	Overlapping	All	Yes	No	CNA (Confederazione nazionale dell'artigianato e della piccola e media impresa, National Confederation of Craft Trades and Small- and Medium-Sized Enterprises (CNA), Rete Imprese Italia

Representativeness of the European social partner organisations: Food and drink sector

MS	Employer organisation	Width of domain (number of subsectors covered)	Covers only food, only drink or both	Membership domain type	Type of companies covered	Covers all regions	Covers the largest companies in the sector	Cross-industry affiliation
	Casartigiani	16	Both	Overlapping	Mostly SMEs	Yes	No	Rete Imprese Italia
	CLAAI	16	Both	Overlapping	Mostly SMEs	Yes	No	
	Legacoop Agroalimentare	16	Both	Overlapping	Cooperatives	Yes	No	National League of Cooperatives (Legacoop)
	Agrital – AGCI	16	Both	Overlapping	Cooperatives	Yes	No	National General Association of Italian Cooperatives (AGCI)
	Fedagri-Confcooperative	16	Both	Overlapping	Cooperatives	Yes	No	Italian Confederation of Cooperatives (Confcooperative)
LU	FIAL	9	Both	Sectional	All	Yes	Yes	FEDIL (the voice of Luxembourg's industry)
MT	MEA	13	Both	Sectional overlapping	All	Yes	Yes	
NL	FNLI	16	Both	Congruent	All	Yes	No	Confederation of Netherlands Industry and Employers (VNO-NCW)
	NZO	3	Both	Sectional overlapping	All	Yes	Yes	
	VIGEF	1	Only food	Sectional	All	Yes	No	
	FWS	1	Only drink	Sectional	All	Yes	No	VNO-NCW
	AKSV	3	Only food	Sectional	All	Yes	No	
	COV	1	Only food	Sectional	All	Yes	Yes	VNO-NCW
	VBZ	2	Only food	Sectional	All	Yes	No	CIUS (a cooperation network)
	Gemzu	1	Only food	Sectional overlapping	Large companies	Yes	No	Agrarian Food Provision Trade (AVH)
	NEPLUVI	2	Only food	Sectional	All	Yes	No	VNO-NCW
	NEVEDI	1	Only food	Sectional	All	Yes	No	VNO-NCW
	NBOV	1	Only food	Sectional overlapping	All	Yes	No	

Representativeness of the European social partner organisations: Food and drink sector

MS	Employer organisation	Width of domain (number of subsectors covered)	Covers only food, only drink or both	Membership domain type	Type of companies covered	Covers all regions	Covers the largest companies in the sector	Cross-industry affiliation
MS	NVB	1	Only food	Sectional	Medium-sized and large companies	Yes	No	VNO-NCW
	KVNW	2	Only drink	Sectional	n.d.	Yes	No	VNO-NCW
	SpiritsNL	1	Only drink	Sectional	All	Yes	No	VNO-NCW
	VisNed	1	Only food	Sectional overlapping	All	Yes	No	VNO-NCW
	VNV (fish)	1	Only food	Sectional overlapping	Mostly SMEs	Yes	No	
	VNV (meat)	1	Only food	Sectional	All	Yes	No	
PL	PFPZ	10	Both	Sectional	All	Yes	No	Union of Entrepreneurs and Employers (ZPP)
PT	FIPA	7	Both	Sectional	All	Yes	Yes	Confederation of Portuguese Business (CIP)
	Ancipa	4	Only food	Sectional	All	Yes	No	
	Casa do Azeite	1	Only food	Sectional overlapping	All	Yes	No	
	ANIL	1	Only food	Sectional overlapping	All	Yes	Yes	
	APIM	1	Only food	Sectional	All	Yes	No	CIP
	ANIA	1	Only food	Sectional	All	Yes	No	
	AICC	1	Only food	Sectional	All	Yes	Yes	
	IACA	1	Only food	Sectional overlapping	All	Yes	No	
	APIAM	1	Only drink	Sectional	All	Yes	Yes	
	Ancave	1	Only food	Sectional overlapping	n.d.	Yes	No	
	ITA	1	Only food	Sectional	All	Yes	No	
	ALIF	1	Only food	Sectional overlapping	All	Yes	No	
	ANICP	1	Only food	Sectional	All	Yes	No	
	AIT	2	Both	Sectional	All	Yes	No	
	ACIP	1	Only food	Sectional overlapping	All	Yes	No	
	AIPAN	1	Only food	Sectional overlapping	All	Yes	No	

Representativeness of the European social partner organisations: Food and drink sector

MS	Employer organisation	Width of domain (number of subsectors covered)	Covers only food, only drink or both	Membership domain type	Type of companies covered	Covers all regions	Covers the largest companies in the sector	Cross-industry affiliation
	AIPL	1	Only food	Sectional overlapping	All	Yes	No	
	Asimpala	1	Only food	Sectional overlapping	All	Yes	No	
	ADCP	2	Only drink	Sectional overlapping	Cooperatives	Yes	No	
RO	Romalimenta	16	Both	Congruent	Mostly medium-sized and large companies	Yes	Yes	National Council of Small and Medium Private Enterprises
SE	Li	16	Both	Congruent	All	Yes	Yes	Swedish Confederation of Enterprises
SI	GZS – ZKŽP	16	Both	Overlapping	All	Yes	Yes	Chamber of Commerce and Industry of Slovenia (GZS)
	ZZS	10	Both	Sectional overlapping	All	Yes	No	
	ZDS	16	Both	Overlapping	All	Yes	No	
SK	PKS	10	Both	Sectional overlapping	All	Yes	Yes	RUZ SR
	SCS	1	Only food	Sectional	All	Yes	n.d.	
	SZVPS	2	Only drink	Sectional overlapping	All	Yes	n.d.	
	ZVLal	1	Only food	Sectional overlapping	All	Yes	n.d.	AZZZ SR
EU27			Only food: 57 (53%) Only drink: 13 (12%) Both: 36 (34%) n.d.: 1 (1%)	Congruent: 9 (8%) Sectional: 55 (51%) Overlapping: 11 (10%) Sectional overlapping: 31 (29%)	All: 88 (82%) Specific: 16 (15%) n.d.: 2 (2%)	Yes: 106 (99%) n.d.: 1 (1%)	Yes: 29 (27%) No: 67 (63%) n.d.: 11 (10%)	Yes: 47 (44%) No: 60 (56%)

Notes: Dark green shading denotes umbrella organisations. Light green shading denotes the member organisations of the umbrella organisation. n.d., no data available.

Source: Network of Eurofound Correspondents' contributions to this study, 2020

2.4. Involvement of employer organisations in collective bargaining

The previous section considered the sector-relatedness and membership of the employer organisations in the food and drink sector. This section will concentrate on their involvement in collective bargaining. Table 24 shows whether employer organisations are involved in single-employer (company-level) or multi-employer (sector-level) collective bargaining, which parts of the sector are covered by collective bargaining and the share of the sectoral workforce covered by collective bargaining agreements.

There are five countries (Czechia, Estonia, Hungary, Luxembourg and Poland) without employer organisations involved in collective bargaining. In addition, Cyprus, Latvia and Lithuania also do not have an employer organisation involved in collective bargaining. This leaves a total of 19 countries where there is at least one employer organisation involved in either company-level collective bargaining or sector-level collective bargaining.

Table 24: Involvement of employer organisations in collective bargaining, social dialogue and public policy

MS		Employer organisation	Type ¹⁶	Collective bargaining: company level, sector level or both	Parts of the sector covered														Total collective bargaining coverage		Involvement in social dialogue: bipartite, tripartite or both	Consultations on sector-related matters by the government		
					10.1 Meat	10.2 Fish	10.3 Fruit and vegetables	10.4 Oils and fats	10.5 Dairy	10.6 Grain mill products	10.7 Bakery	10.8 Other food	10.9 Animal feeds	10 FOOD	11.01 Spirits	11.02 Wine from grape	11.03 Cider and fruit wine	11.04 Other beverages					11.05 Beer	11.06 Malt
AT	FVNG	EO	Both																			100 %	Both	
	BILG	EO	Sector																				Both	Regular
BE	FEVIA	EO	Sector																			100 %	Bipartite	Regular
	FGBB	EO	Sector																				Bipartite	Regular
BG	SHNB/CXHБ	EO																				100% (100% in NACE 11.05 and 11.06)	Tripartite	Ad hoc
	SPZZP/СПЗЗП	EO	Both																				Tripartite	Ad hoc
	SPKF/СПКФ	EO	Both																				Tripartite	Regular
	AMB/АМБ	BA	Company																				Tripartite	Ad hoc
	SPB/СПБ	EO	Sector																				Both	Ad hoc
	NBPS/НБПС	EO	Both																					Tripartite
CZ	PK ČR	BA																				38%		Regular
DE	Lebensmittelverband Deutschland	BA																				>50%		Regular
	BDSI	EO	Both																				Bipartite	Regular
	VdZ	EO	Both																					Ad hoc
	Verband deutscher Großbäckereien	EO	Sector																					n.d.
	Zentralverband des Deutschen Bäckerhandwerks	EO	Sector																				Bipartite	Regular
DK	DI	EO	Sector																			80–85%	Tripartite	Regular
EE	ETL	BA																				n.d.		Regular

¹⁶ As explained in the introduction to this study (section 0.3) and in Chapter 2, some organisations representing employers are classified as business associations. Their inclusion stems from their membership to European-level social partner organisations relevant to this study or from their involvement in collective bargaining. The Network of Eurofound Correspondents classified each organisation as an employer organisation or as a business association based on the information received from the organisations.

Representativeness of the European social partner organisations: Food and drink sector

MS	Employer organisation	Type ¹⁶	Collective bargaining: company level, sector level or both	Parts of the sector covered																	Total collective bargaining coverage	Involvement in social dialogue: bipartite, tripartite or both	Consultations on sector-related matters by the government	
				10.1 Meat	10.2 Fish	10.3 Fruit and vegetables	10.4 Oils and fats	10.5 Dairy	10.6 Grain mill products	10.7 Bakery	10.8 Other food	10.9 Animal feeds	10 FOOD	11.01 Spirits	11.02 Wine from grape	11.03 Cider and fruit wine	11.04 Other beverages	11.05 Beer	11.06 Malt	11.07 Soft drinks and water				11 DRINK
EL	SEV	EO	Sector																		40% (rough estimate)	Both	Regular	
	SEVT	BA	Sector																			Both	Regular	
	GSEVEE	EO	Sector																			Both	Ad hoc	
ES	FIAB	BA																			98%	Bipartite	Ad hoc	
	ANICE	BA	Sector																				Regular	
	Fenaval	BA	Sector																				Ad hoc	
	AFHSE	BA	Sector																				Regular	
	Conxemar	EO	Sector																				Regular	
	CESFAC	EO	Sector																				Regular	
	Produlce	BA	Both																				Regular	
	FENIL	EO	Sector																				Regular	
	ANEABE	BA	Sector																				Regular	
	FEV	EO	Both																				Regular	
	Anfabra	EO	Sector																				Regular	
FI	ETL	EO	Both																	92%	Bipartite	Regular		
FR	ANIA	EO																			100%	Both	Ad hoc	
	Alliance 7	EO	Sector																				Both	
	FNIL	EO	Sector																				Both	
	Culture Viande	EO	Sector																				Both	
	FEDEV	EO	Sector																				Both	
	FICT	EO	Sector																				Both	
	ANMF	EO	Sector																				n.d.	n.d.
	BRF	EO	Sector																				n.d.	n.d.
	ABF	EO	Sector																				n.d.	n.d.
	FEDALIM	EO	Sector	No data available																		n.d.	n.d.	
	CSEM	EO	Sector																				n.d.	n.d.
	SNSF	EO	Sector																				n.d.	n.d.
	SNIPO	EO	Sector																				n.d.	n.d.
	Adepale	EO	Sector																				Both	
	CVNVS	EO	Sector																				Both	n.d.
HR	HUP UPIIP	EO	Company																	75%	Bipartite	Regular		
HU	FÉSZ	BA																		30–40%	Bipartite			

Representativeness of the European social partner organisations: Food and drink sector

MS	Employer organisation	Type ¹⁶	Collective bargaining: company level, sector level or both	Parts of the sector covered													Total collective bargaining coverage	Involvement in social dialogue: bipartite, tripartite or both	Consultations on sector-related matters by the government				
				10.1 Meat	10.2 Fish	10.3 Fruit and vegetables	10.4 Oils and fats	10.5 Dairy	10.6 Grain mill products	10.7 Bakery	10.8 Other food	10.9 Animal feeds	10 FOOD	11.01 Spirits	11.02 Wine from grape	11.03 Cider and fruit wine				11.04 Other beverages	11.05 Beer	11.06 Malt	11.07 Soft drinks and water
IE	IBEC	EO	Company																	9% (rough estimate)		Regular	
IT	Federali-mentare	EO	Both																	100%	Bipartite	Ad hoc	
	Confartigianato Alimentazione	EO	Sector																		Bipartite	Ad hoc	
	CNA Alimentare	EO	Both																		Bipartite	Ad hoc	
	Casartigiani	EO	Both																		Bipartite	Ad hoc	
	CLAAI	EO	Both																		Bipartite	Ad hoc	
	Legacoop Agro-alimentare	EO	Both																		Bipartite	Ad hoc	
	Agrital – AGCI	EO	Both																		Bipartite	Ad hoc	
	Fedagri-Confcoopera-tive	EO	Both																		Bipartite	Ad hoc	
LU	FIAL	EO																	50–55%		Ad hoc		
MT	MEA	EO	Company																100%	Both	Regular		
NL	FNLI	BA																		90%	n.d.	Yes	
	NZO	EO	Sector																				Ad hoc
	VIGEF	EO	Sector																		Both		
	FWS	EO	Sector																			Regular	
	AKSV	EO	Sector																		Bipartite	Ad hoc	
	COV	EO	Sector																		Tripartite	Ad hoc	
	VBZ	EO	Sector																			Ad hoc	
	Gemzu	EO	Sector																			Regular	
	NEPLUVI	BA	Both																			Regular	
	NEVEDI	EO	Sector																			Regular	
	NBOV	EO	Sector																				
	NVB	EO	Sector																			Regular	
	KVNW	EO	Sector																			Regular	
	SpiritsNL	EO	Sector																			Regular	
	VisNed	BA	Sector																			Regular	
	VNV (fish)	EO	Sector																			Regular	
	VNV (meat)	EO	Sector																			Regular	

Representativeness of the European social partner organisations: Food and drink sector

MS	Employer organisation	Type ¹⁶	Collective bargaining: company level, sector level or both	Parts of the sector covered														Total collective bargaining coverage	Involvement in social dialogue: bipartite, tripartite or both	Consultations on sector-related matters by the government			
				10.1 Meat	10.2 Fish	10.3 Fruit and vegetables	10.4 Oils and fats	10.5 Dairy	10.6 Grain mill products	10.7 Bakery	10.8 Other food	10.9 Animal feeds	10 FOOD	11.01 Spirits	11.02 Wine from grape	11.03 Cider and fruit wine	11.04 Other beverages				11.05 Beer	11.06 Malt	11.07 Soft drinks and water
PL	PFPZ	EO																			<10%		Regular
PT	FIPA	BA																			63%		Regular
	Ancipa	EO	Sector																				n.d.
	Casa do Azeite	EO	Sector																				n.d.
	ANIL	EO	Sector																				n.d.
	APIM	EO	Sector																				n.d.
	ANIA	EO	Sector																				n.d.
	AICC	EO	Sector																				n.d.
	IACA	EO	Sector																				n.d.
	APIAM	EO	Sector																				n.d.
	Ancave	EO	Sector																				n.d.
	ITA	EO	Sector																				n.d.
	ALIF	EO	Sector																				n.d.
	ANICP	EO	Sector																				n.d.
	AIT	EO	Sector																				n.d.
	ACIP	EO	Sector																				n.d.
	AIPAN	EO	Sector																				n.d.
	AIPL	EO	Sector																				n.d.
	Asimpala	EO	Sector																				n.d.
	ADCP	EO	Sector																				n.d.
RO	Romalimenta	EO	Sector																	9%	Both	Regular	
SE	Li	EO	Sector																	>90%	Bipartite	Regular	
SI	GZS – ZKŽP	EO	Both																		80%	Tripartite	Regular
	ZZS	EO	Both																			Bipartite	Regular
	ZDS	EO	Both																			Both	Ad hoc
SK	PKS	BA																			40%		Ad hoc
	SCS	EO	Both																				Ad hoc
	SZVPS	EO	Both																			Tripartite	Ad hoc
	ZVLal	EO	Both																			Tripartite	Regular

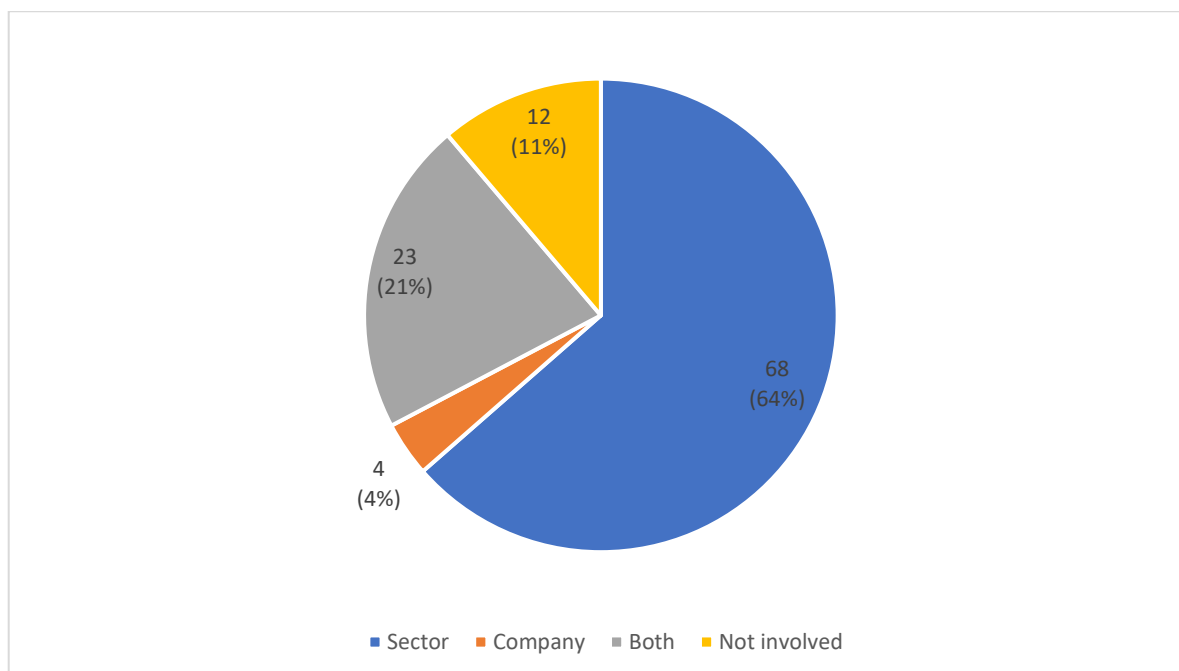
MS	Employer organisation	Type ¹⁶	Collective bargaining: company level, sector level or both	Parts of the sector covered																	Total collective bargaining coverage	Involvement in social dialogue: bipartite, tripartite or both	Consultations on sector-related matters by the government	
				10.1 Meat	10.2 Fish	10.3 Fruit and vegetables	10.4 Oils and fats	10.5 Dairy	10.6 Grain mill products	10.7 Bakery	10.8 Other food	10.9 Animal feeds	10.10 FOOD	11.01 Spirits	11.02 Wine from grape	11.03 Cider and fruit wine	11.04 Other beverages	11.05 Beer	11.06 Malt	11.07 Soft drinks and water				11.1 DRINK
EU27		EOs: 90 (84%)	Company: 4 (4%)																				Bipartite: 19 (18%)	Ad hoc: 26 (24%)
			Sector: 68 (64%)	31 (29%)	25 (23%)	26 (24%)	21 (20%)	29 (27%)	25 (23%)	37 (35%)	32 (30%)	23 (21%)	79 (74%)	24 (22%)	21 (20%)	20 (19%)	21 (20%)	24 (22%)	20 (19%)	29 (27%)	36 (34%)		Tripartite: 10 (9%)	Regular: 43 (40%)
		BAs: 17 (16%)	Both: 23 (21%)																				Both: 18 (17%)	Total: 70 (65%)
			Total: 95 (89%)																					

Notes: Light blue shading denotes a positive response. Dark blue shading indicates collective bargaining covering at least one subsector (food or drink). Dark green shading denotes umbrella organisations. Light green shading denotes the member organisations of the umbrella organisation. BA, business association; EO, employer organisation; n.d., no data available.

Source: Network of Eurofound Correspondents' contributions to this study, 2020

As shown in Figure 19, employer organisations tend to be engaged in sector-level collective bargaining, as 68 organisations (64%) are involved in only sector-level bargaining and 23 (21%) are involved in both sector- and company-level bargaining. In total, 91 employer organisations (85%) are bargaining at sector level. Four organisations (4%) are engaged in only company-level bargaining (in Bulgaria, Croatia, Ireland and Malta), but – adding those that are engaged at both levels – there are a total of 27 organisations (25%) involved in bargaining at company level. However, 12 employer organisations (11%) are not involved in collective bargaining at all. Eight of those are considered business associations rather than employer organisations (see also Table 24). The objective of business associations is usually business development, not engaging in social dialogue and collective bargaining with the aim of improving working conditions. However, this study includes business organisations that are members of a European-level employer organisation or that are involved in collective bargaining (see also Section 0.4). Business associations were classified as such by the Network of Eurofound Correspondents based on the information provided by the organisations. A total of 17 organisations (16%) were identified as business associations, of which nine are engaged in collective bargaining.

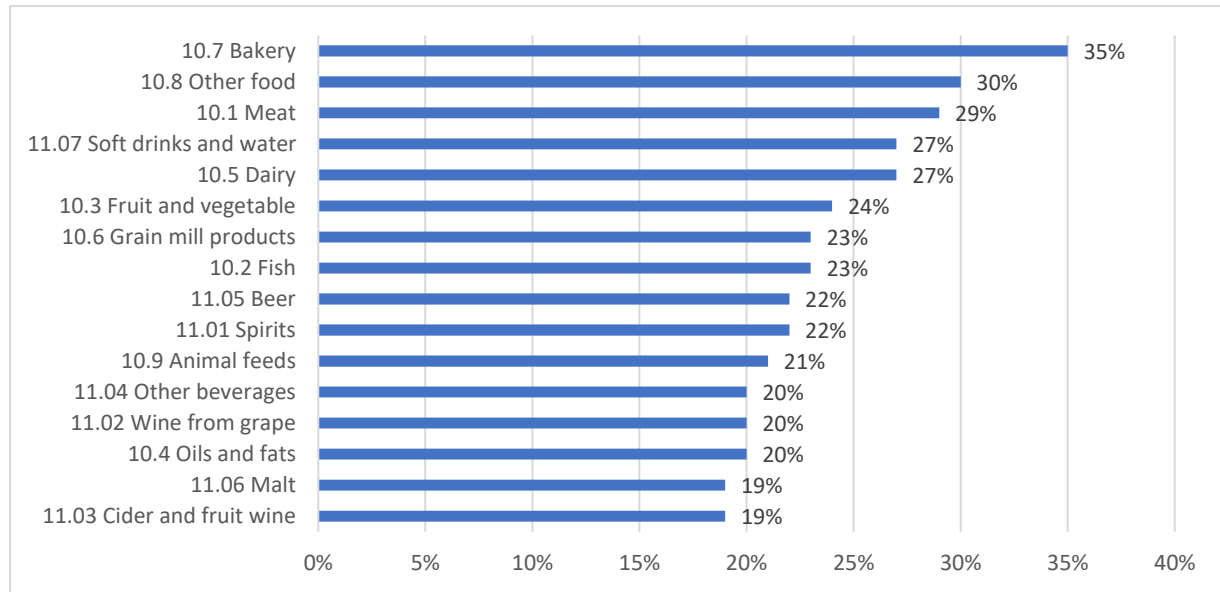
Figure 19: Involvement of employer organisations in different forms of collective bargaining, EU27



Source: Network of Eurofound Correspondents' contributions to this study, 2020

Figure 20 shows the proportions of sectoral employer organisations with collective agreements that cover different parts of the food and drink sector. Employer organisations are most active in bargaining in manufacture of bakery products (35% of organisations) and manufacture of other food products (30%), which are also the activities covered by the largest shares of employer organisations. The least important activities are manufacture of malt and manufacture of cider and fruit wine, in both of which 19% of organisations are engaged in collective bargaining. In the other parts of the sector, the share of employer organisations engaged in collective bargaining is 20–29%.

Figure 20: Proportion of employer organisations with collective agreements covering different parts of the sector, EU27



Source: Network of Eurofound Correspondents' contributions to this study, 2020

Table 24 above shows the proportion of the workforce covered by collective agreements. This information was gathered by the Network of Eurofound Correspondents and includes rough estimations. It is evident from the data that bargaining coverage varies substantially between countries, from less than 10% to 100%. Higher coverage (at least 75%) is recorded in Austria, Belgium, Croatia, Denmark, Finland, France, Italy, Malta, the Netherlands, Slovenia, Spain and Sweden. There is medium coverage (21–74%) in Czechia, Germany, Greece, Hungary, Luxembourg, Portugal and Slovakia. Bulgaria, Ireland, Poland and Romania have low coverage (20% or less). Data for Estonia are not available. Cyprus, Latvia and Lithuania are not captured in Table 24 as no relevant employer organisations were identified in those countries for this study. Data about these countries' collective bargaining coverage are available in Table 17, which shows that Cyprus and Latvia have low coverage, while no information is available for Lithuania.

2.5. Collective bargaining patterns and social dialogue practices

In previous sections, the sector-relatedness, coverage and collective bargaining engagement of both trade unions and employer organisations were assessed. In this section, the information is brought together to reveal collective bargaining and social dialogue patterns of the trade unions and employer organisations in the EU27.

The coverage of different types of collective bargaining is summarised in terms of numbers and shares of individual trade unions and employer organisations in Table 25. All trade unions identified in this study (except one) are engaged in collective bargaining. For trade unions, single-employer bargaining (company level) is the most important, as, in total, 81% of trade unions are engaged either in only company-level bargaining (34%) or in both company- and sector-level bargaining (47%). Multi-employer bargaining is carried out by a total of 64% of trade unions; 18% of those engaged in multi-employer bargaining are engaged in only multi-employer (i.e. no single-employer) bargaining.

Employer organisations have a different pattern. Some 85% of all employer organisations are involved in collective bargaining. Single-employer bargaining is less important for employer organisations (in total, 24% of organisations are engaged in this; 4% of those engaged in single-employer bargaining are engaged solely in single-employer bargaining). On the other hand, 81% of organisations are engaged in multi-employer bargaining: 60% in multi-employer bargaining only and 20% in both single- and multi-employer bargaining.

Overall, 58 trade unions in the EU27 bargain with a total of 91 employer organisations, with the aim of reaching sector-level agreements. At the same time, in the case of single-employer agreements, a total of 73 trade unions have a total of 27 employer organisations as partners.

Table 25: Collective bargaining patterns in the sector (number and % of organisations), EU27

	Trade unions					Employer organisations				
No collective bargaining	1 (1%)					17 (15%)				
Multi-employer bargaining only	16 (18%)	58 (64%)		89 (99%)	90 (100%)	68 (61%)	91 (81%)		95 (85%)	112 (100%)
Both single- and multi-employer bargaining	42 (47%)					23 (21%)				
Single-employer bargaining only	31 (34%)		73 (81%)			4 (4%)		27 (24%)		

Source: Network of Eurofound Correspondents' contributions to this study, 2020

In Table 26, the types of collective bargaining are presented on a country-by-country basis. This illustrates the national collective bargaining patterns in the food and drink sector. In most of the countries (17), both single- and multi-employer bargaining take place. However, this does not mean that each organisation/trade union is engaged in both of these. Typically, one or some of the trade unions in one country are engaged in only sector-level bargaining or only company-level bargaining, while the rest of the trade unions are engaged in both. Trade unions engaged in only sector-level

bargaining and those engaged in only company-level bargaining do not simultaneously exist in any of the countries (see also Section 2.2). In nine countries, only company-level bargaining is present, meaning that no organisations bargain at sector level. In one country – Greece – only sector-level bargaining takes place.

Table 26: Type of collective bargaining, by Member States

Type of collective bargaining	Member States
Multi-employer bargaining only	EL
Both single- and multi-employer bargaining	AT, BE, BG, DE, DK, ES, FI, FR, IT, LV, MT, NL, PT, RO, SE, SI, SK
Single-employer bargaining only	CY, CZ, EE, HR, HU, IE, LT, LU, PL
No collective bargaining	None

Source: Network of Eurofound Correspondents' contributions to this study, 2020

Table 27 builds on the previous table by, in addition to showing the type of collective bargaining in each country, adding the proportion of the sectoral workforce covered by collective bargaining. There are variations across countries, and no clear links between the types or coverage rates can be made. However, countries where the coverage is very high (>74%), sector-level bargaining is more prominent among employer organisations, and most of the individual trade unions are engaged in both types of bargaining. In countries with lower bargaining coverage (<25%), there tend to be no employer organisations engaged in bargaining or they bargain only at company level, and there tend to be more trade unions engaged in only company-level bargaining.

Table 27: Coverage of collective bargaining, by Member States

Type of collective bargaining	Collective bargaining coverage						Information not available
	>94%	75–94%	50–74%	25–49%	1–24%	0%	
Multi-employer bargaining only				EL			
Both single- and multi-employer bargaining	AT, BE, ES, FR, IT, MT	DK, FI, NL, SE (>90%), SI	DE (>50%), PT	SK	BG, LV, RO		
Single-employer bargaining only		HR	LU	CZ, HU	CY, IE, PL		EE, LT
No collective bargaining							

Source: Network of Eurofound Correspondents' contributions to this study, 2020

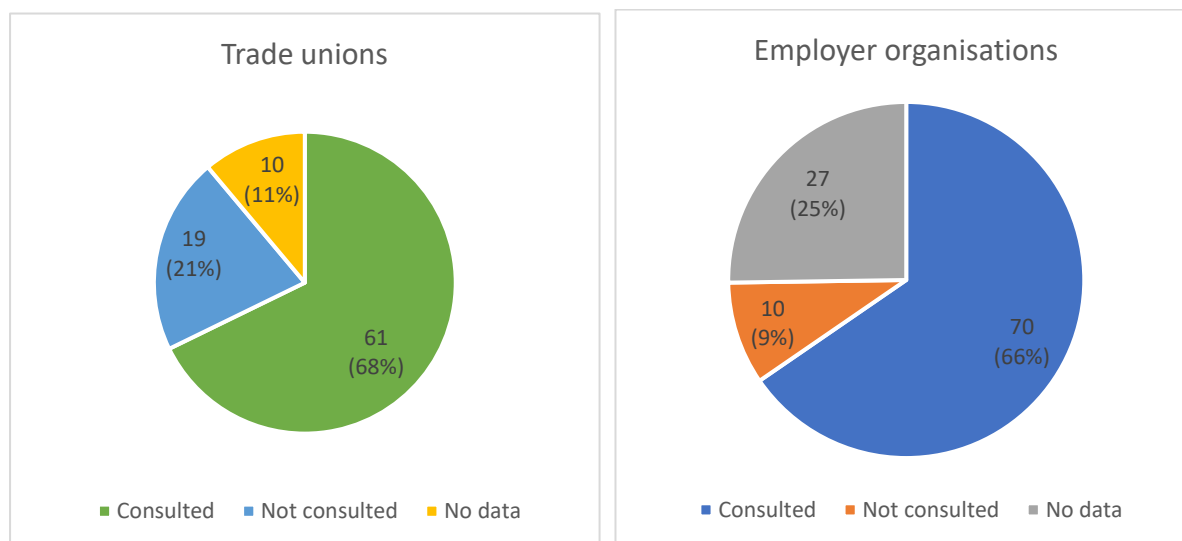
2.6. Participation in public policy and social dialogue

In addition to sector-relatedness, membership and collective bargaining, involvement in policymaking is another indicator of the relevance of national trade unions and employer organisations in the sector. This section first looks at the governments' consultations with the social partners and then looks at the social partners' participation in bipartite or tripartite social dialogue.

Social partners' participation in public policy

Figure 21 illustrates the proportions of trade unions and employer organisations involved in consultations arranged by the national governments with regard to sectoral policies. The rather considerable lack of data makes it difficult to produce a clear picture. However, it can be seen, based on the available information, that most of the social partners (trade unions (68% of all trade unions) or employer organisations (66%)) are being consulted on sector-related matters. However, those not consulted form a larger proportion among trade unions (21%) than among employer organisations (9%).

Figure 21: National social partners' involvement in government consultations, EU27



Source: Network of Eurofound Correspondents' contributions to this study, 2020

Table 28 reveals the pattern of consultations on a country-by-country basis. In 22 countries, at least one trade union and at least one employer organisation are being consulted by the government on sector-related matters. In Luxembourg, no trade unions are consulted, while the only employer organisation is consulted on an ad hoc basis. In Hungary, Latvia and Lithuania, trade unions, but not employer organisations, are included in policymaking. Cyprus is the only country where none of the social partners are being consulted by the government, according to available information.

Table 28: Consultation of employers and trade unions, by Member States

	At least one trade union consulted	No trade union consulted
At least one employer organisation consulted	AT, BE, BG, CZ, DE, DK, EE, EL, ES, FI, FR, HR, IE, IT, MT, NL, PL, PT, RO, SE, SI, SK	LU
No employer organisation consulted	HU, LT*, LV*	CY*

Note: *No employer organisations were included in the analysis; see Chapter 2 for details.

Source: Network of Eurofound Correspondents' contributions to this study, 2020

Overall, it can be concluded that most of the trade unions and employer organisations are being involved in sector-related policymaking by the national governments. Such involvement takes place in almost all of the countries.

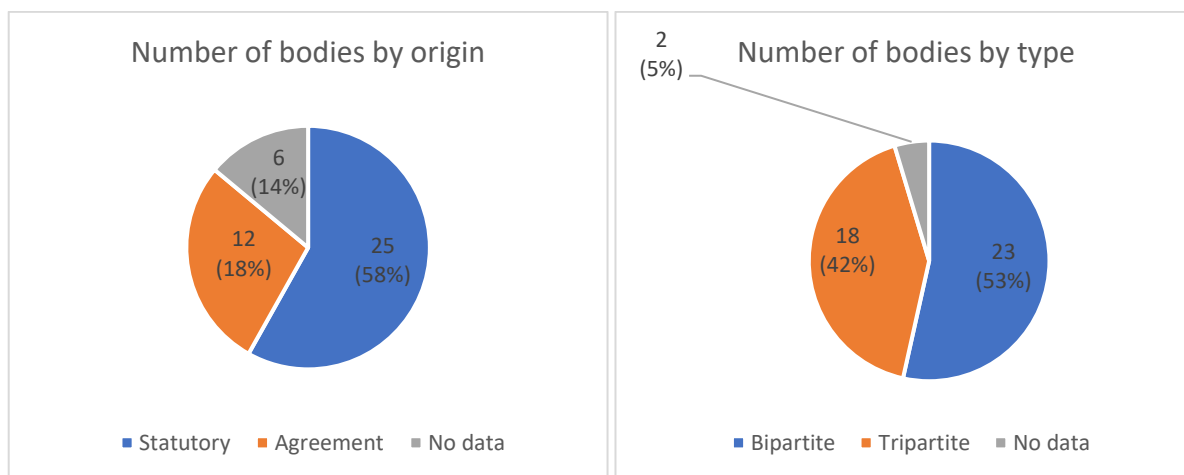
Tripartite and bipartite participation in social dialogue

Tripartite and bipartite participation in social dialogue refers to social partners' cooperation with each other and with the government in discussing sector-related matters and designing interventions. This cooperation could be particularly important in strengthening the social partners' positions and in gaining recognition in countries without established practices of multi-employer bargaining. This section looks at bipartite and tripartite bodies that are particularly established and directly related to the food and drink sector (i.e. not those simply engaged in ad hoc discussions between social partners).

Table 29 shows that there are 43 social dialogue bodies established in a total of 18 Member States, leaving nine countries without such bodies. Among those nine countries are Cyprus, Czechia, Estonia, Ireland and Lithuania, which have no established multi-employer bargaining practices. Greece is also among those nine; it is the only Member State to have only multi-employer bargaining.

Figure 22 shows the proportions of the bodies based on their type and origin. Bipartite bodies (53%) are slightly more predominant than tripartite bodies (42%). At the same time, statutory bodies (58%) constitute a larger proportion than bodies established based on agreements (28%).

Figure 22: Social dialogue bodies by type and origin, EU27



Source: Network of Eurofound Correspondents' contributions to this study, 2020

Table 29 presents the details of each social dialogue body: name, type, domain of activity, origin and participating social partners.

Table 29: Tripartite and bipartite social dialogue bodies in which sector-related issues are dealt with or in which sector-related social partners are involved

MS	Social dialogue body	Bipartite/ tripartite	Domain of activity	Origin: agreement/ statutory	Sectoral trade unions participating	Sectoral employer organisations participating
AT	Codex Commission for the Publication of the Austrian Food Book (<i>Codex Alimentarius Austriacus</i>)	Tripartite	Definitions, research methods and assessment principles; guidelines for the manufacture and marketing of goods; preparation and coordination of the Austrian position for EU and international committees	n.d.	n.d.	n.d.
	Committees within the AgrarMarkt Austria, the Austrian funding agency for agriculture and rural development	Tripartite	Agricultural food pricing, quality and marketing	n.d.	n.d.	n.d.
BE	Second Pillar Fund JC 118	Bipartite	Second pillar pension fund	Statutory	ACLVB-CGLSB, ACV Voeding en Diensten, Horval	FEVIA, FGGB
	Guarantee and Social Fund for the Food Industry	Bipartite	Guarantee and social fund	Statutory	ACLVB-CGLSB, ACV Voeding en Diensten, Horval	FEVIA, FGGB
	Social and Guarantee Fund for the Bakery, Confectionery and Refreshment Parlours	Bipartite	Guarantee and social fund	Statutory	ACLVB-CGLSB, ACV Voeding en Diensten, Horval	FEVIA, FGGB
	Second Pillar Fund for Food Industry White-Collar Workers	Bipartite	Second pillar pension fund	Statutory	ACLVB-CGLSB, BBTK SETCa, ACV-Puls, CSC-CNE	FEVIA
	Guarantee and Social Fund for White-Collar Workers in the Food Industry	Bipartite	Guarantee and social fund	Statutory	ACLVB-CGLSB, BBTK SETCa, ACV-Puls, CSC-CNE	FEVIA
BG	Sectoral Council for Tripartite Cooperation (SCTC) 'Food Industry' at the Ministry of Economy and Industry	Tripartite	Horizontal issues discussion of draft laws, draft by-laws and decisions of the Council of Ministers related to the regulation of labour relations, social security relations and issues of living standards in the sector	Statutory	FSOHP/ΦCOXΠ, FHPP/ΦXΠΠ, SBHN/СБХН, NSFTKTU/HCΦT KTY	SHNB/CXHБ, APBNB, SPZZP/CP33Π, AMB/AMБ, SPKF/CPKΦ, NBSHS, SPB/CPБ, NBPS/HБΠC
	Sectoral/Branch Council on Working Conditions (Occupational Health and Safety) 'Food	Tripartite	Health and safety at work	Statutory	FSOHP/ΦCOXΠ, FHPP/ΦXΠΠ, SBHN/СБХН, NSFTKTU/HCΦT KTY	SHNB/CXHБ, APBNB, SPZZP/CP33Π, AMB/AMБ, SPKF/CPKΦ,

Representativeness of the European social partner organisations: Food and drink sector

MS	Social dialogue body	Bipartite/ tripartite	Domain of activity	Origin: agreement/ statutory	Sectoral trade unions participating	Sectoral employer organisations participating
	Industry' at the Ministry of Economy and Industry					NBSHS, SPB/СПБ, NBPS/НБПС
	Branch Council for Social Partnership for the Brewing Industry	Bipartite	Wages, social policy, corporate social responsibility and health and safety at work	Statutory	FSOHP/ΦCOXΠ, FHPP/ΦΧΠΠ	SPB/СПБ
	Sectoral Council for Tripartite Cooperation at the Ministry of Agriculture, Food and Forestry	Tripartite	Labour relations, social security and living standards in the sector	Statutory	FNSZ/ΦHC3	SHNB/CXHБ, APBNB, SPZZP/СПЗЗП, AMB/АМБ, SPKF/СПКФ, NBSHS, SPB/СПБ, NBPS/НБПС
CY	No social dialogue bodies in the sector					
CZ	No social dialogue bodies in the sector					
DE	Zusatzversorgungskasse der Beschäftigten des Bäckerhandwerks (Social Fund for Bakery Workers)	Bipartite	Pensions	Agreement	n.d.	n.d.
	Berufsgenossenschaft Nahrungsmittel und Gastgewerbe (Association for Food and Hospitality)	Bipartite	Pensions	Agreement	n.d.	n.d.
DK	Det Faglige Fællesudvalg – Bagere og Konditorer (Vocational Committee for Bakers and Confectioners)	Tripartite	Education	Statutory	NNF	None
	Mejeribrugets Fællesudvalg (Vocational Committee for the Dairy Sector)	Tripartite	Education	Statutory	NNF, 3F	DI
	Slagterfagets Fællesudvalg (Vocational Committee for the Butchery Trade)	Tripartite	Education	Statutory	NNF	DI
	Branchefælles-skab for Arbejdsmiljø (BFA) Industri (Trade Association for Working Environment – Industry)	Tripartite	Working environment	Statutory	3F, CO-industri	DI
EE	No social dialogue bodies in the sector					
EL	No social dialogue bodies in the sector					
ES	Comisión de Asuntos Laborales por el Covid-19 (Commission on Labour Affairs for COVID-19)	Bipartite	COVID-19 effects in the sector, health and safety measures and guarantee of production	Agreement	FI-CCOO, UGT-FICA	FIAB

Representativeness of the European social partner organisations: Food and drink sector

MS	Social dialogue body	Bipartite/ tripartite	Domain of activity	Origin: agreement/ statutory	Sectoral trade unions participating	Sectoral employer organisations participating
FI	Elintarvikealan työalatoimikunta – Työturvallisuuskeskus (Sectoral Committee of the Food and Textile Industry)	Bipartite	Occupational safety	n.d.	PRO, SEL, YTN, MVL	ETL
	Opetushallituksen tutkintotoimikunta (the Agency for Education's educational committee for the food and drink sector)	Bipartite	Education	n.d.	n.d.	n.d.
FR	Conseil national de l'alimentation (National Food Council)	Tripartite	All issues related to food	Statutory	FGA-CFDT, FGTA-FO, CFE-CGC Agro, FNAF-CGT	ANIA
	Copil PEECA	Tripartite	Housing of employees and seasonal workers	Statutory	FGA-CFDT, FGTA-FO, CFE-CGC Agro, FNAF-CGT	ANIA
	CPNE	Bipartite	Employment issues and collective bargaining	Agreement	Representative trade unions (no list provided)	Representative employer organisations (no list provided)
	CPNI	Bipartite	Collective bargaining	Agreement and statutory	Representative trade unions (no list provided)	Representative employer organisations (no list provided)
	OPCO	Bipartite	Vocational education	Agreement and statutory	Representative trade unions (no list provided)	Representative employer organisations (no list provided)
HR	Socijalno vijeće za sektor prehrambene industrije i poljoprivrede (Social Council for the Food Industry and Agriculture)	Bipartite	Competitiveness, employment policies, industrial policies, quality of services, education, health and safety	Agreement	PPDIV	CEA
HU	Hungarian Food Sector Dialogue Committee (ÉÁPB)	Bipartite	Professional issues ¹⁷	Statutory	ÉDSZ, MEDOSZ	FÉSZ
	Ad hoc meetings of the food sector and the relevant ministry	Bipartite	Only professional organisations, on legislative or regulatory issues; no work-related topics are discussed	Agreement	None	FÉSZ
IE	No social dialogue bodies in the sector					
IT	Alifond	Bipartite	Occupational pension fund	Agreement	FLAI-CGIL, FAI-CISL, UILA-UIL	Federalimentare

¹⁷ Not currently active.

Representativeness of the European social partner organisations: Food and drink sector

MS	Social dialogue body	Bipartite/ tripartite	Domain of activity	Origin: agreement/ statutory	Sectoral trade unions participating	Sectoral employer organisations participating
	Fondo assistenza sanitaria alimentaristi (FASA) (Health Insurance Fund for the Food Industry)	Bipartite	Health insurance fund	Agreement	FLAI-CGIL, FAI-CISL, UILA-UIL	Federalimentare
	Filcoop	Bipartite	Health insurance fund and occupational pension fund	Agreement	FLAI-CGIL, FAI-CISL, UILA-UIL	AGCI-Agrital, Legacoop-Agroalimentare, Fedagri-Confcooperative
LT	No social dialogue bodies in the sector					
LU	No social dialogue bodies in the sector					
LV	National Tripartite Cooperation Council (Transport, Communications and Information Technologies Subcouncil)	Tripartite	General	Statutory	Members of cross-sectoral trade unions indirectly	Members of cross-sectoral employer organisations indirectly
MT	Malta Council for Economic Development (MCESD)	Both	Provides a forum for bipartite dialogue between employers and employees' representatives, and a supportive framework for social dialogue; provides systematic monitoring and evaluation of bipartite and tripartite social dialogue; its remit reaches beyond the food and drink sector and encompasses all economic sectors and matters of social relevance	Statutory	GWU, UHM	MEA
NL	Social and Economic Council	Tripartite	Advisory and research body, and forum for policy negotiations	Statutory	CNV, FNV, VCP	VNO-NCW, LTO and an independent expert (crown appointed)
	Stichting van de Arbeid (StvdA) (labour foundation)	Bipartite	National-level negotiation forum and advisory organisation	Statutory	CNV, FNV, VCP	VNO-NCW, LTO
	Various sectoral social dialogue bodies	Bipartite	Various (meat, confectionery, bakeries, dairy, animal feed, etc.)	Agreement	CNV, FNV	Delegated sectoral employers
PL	Tripartite Team for the Food Industry	Tripartite	All issues related to sectoral problems	Agreement	Members of cross-sectoral trade unions indirectly	Members of cross-sectoral employer organisations indirectly

Representativeness of the European social partner organisations: Food and drink sector

MS	Social dialogue body	Bipartite/ tripartite	Domain of activity	Origin: agreement/ statutory	Sectoral trade unions participating	Sectoral employer organisations participating
PT	No social dialogue bodies in the sector					
RO	Social Dialogue Commission under the Ministry of Agriculture and Rural Development	Tripartite	Food industry (one of the technical subcommittees)	Statutory	Members of cross-sectoral trade unions indirectly	Members of cross-sectoral employer organisations indirectly
	Economic and Social Council (CES)	Tripartite	A consultative forum that must be consulted on all draft laws in its area of competence (economy, taxes, labour, social protection, health, education, research, culture, wages)	Statutory	Members of cross-sectoral trade unions indirectly	Members of cross-sectoral employer organisations indirectly
SE	No social dialogue bodies in the sector					
SI	Economic and Social Council of Slovenia	Tripartite	A tripartite body established with the purpose of considering issues and measures concerning economic and social policies, and other issues related to the specific fields of the social partners' dialogue, and providing opinions or positions on these issues	Statutory	Members of cross-sectoral trade unions indirectly	Members of cross-sectoral employer organisations indirectly
SK	Economic and Social Council (HSR)	Tripartite	Employment, working conditions, wages and social policy	Statutory	Members of cross-sectoral trade unions indirectly	Members of cross-sectoral employer organisations indirectly

Notes: Austria – bipartite or tripartite permanent bodies generally do not exist in Austria, but social partner consultation is based on the practice of regular but informal cooperation. Germany – Zusatzversorgungskasse der Beschäftigten des Bäckerhandwerks was established in the 1970s; in 2004, the fund was abolished in favour of individualised occupational pension schemes by the collective bargaining partners. n.d., no data available.

Source: Network of Eurofound Correspondents' contributions to this study, 2020

2.7. Fragmentation and pluralism

This section provides an overview of the reasons for organisational fragmentation and pluralism in the sector. Fragmentation occurs when different organisations cover different parts of a sector. In that context, organisations are complementary, as their membership domains are not overlapping. Pluralism, on the other hand, is when organisations coexist in the same (or a very similar) domain, representing the same types of employees.

In the food and drink sector, there are, on average, 3.3 trade unions per Member State. The reasons for there being more than one trade union per country (where this is the case) are provided in Table 30. It shows that the most common reason is fragmentation: having members in different parts of the sector or engaged in different types of activities (e.g. food subsector vs drink subsector) applies to 12 countries, organising different categories of workers (e.g. blue-collar vs white-collar workers) applies to 8 countries, having members in different parts of the country applies to 4 countries and having members in different types of companies (e.g. of different sizes) applies to 2 countries. Pluralism (i.e. having similar membership domains, but differing in terms of ideology) is recorded in 8 countries. There may be multiple reasons for fragmentation and pluralism in any one country (see Table 30).

Table 30: Reasons for fragmentation and pluralism of trade unions

MS	They organise different categories of workers	They have members in different parts of the country	They have members in different types of companies in terms of size or ownership	They have members in different parts of the sector/types of activities	They have similar membership domains but differ in terms of ideology	Other reasons
AT						
BE						
BG						
CY						
CZ						
DE	1 trade union in sector					
DK						
EE	1 trade union in sector					
EL						
ES						
FI						
FR						
HR	No fragmentation					
HU				(^a)		
IE						
IT						
LT						(^b)
LU						
LV						(^c)
MT						
NL						
PL						
PT						
RO						
SE						
SI						
SK						
EU27	8	4	2	12	8	2

Notes: Green shading denotes a positive response. (^a) The reason for fragmentation in Hungary is loyalty based on historical connection: members stayed with the trade union that had been present in their company for a long time. (^b) The reason for fragmentation in Lithuania is that one trade union represents only the employees working in the food operations of a large agriculture company, while the rest of the workforce in the food and drink sector belongs to another trade union. (^c) The reason for fragmentation in Latvia is that trade union members work in different companies.

Source: Network of Eurofound Correspondents' contributions to this study, 2020

Regarding employer organisations, there are, on average, 3.9 organisations per Member State. There is more variation in the number of employer organisations per country than in the number of trade unions per country, as there are altogether 11 countries where there is only one or no employer organisations, compared with two such countries in the case of trade unions. The most prominent reason for fragmentation among employer organisations is having members in different parts of the sector/engaged in different activities. This was also seen when looking at the width of sectoral coverage (see Sections 2.1 and 2.3) – employer organisations mostly have narrow coverage of segments, while trade unions tend to have wider coverage. Still, there are two countries where employer organisations have members from different parts of the country, four countries where their members are different types of companies and three countries where pluralism exists. Table 31 provides a detailed overview.

Table 31: Reasons for fragmentation and pluralism of employer organisations

MS	They have members in different parts of the country	They have members in different types of companies in terms of size or ownership	They have members in different parts of the sector/types of activities	They have similar membership domains but differ in terms of ideology	Other reasons
AT					
BE					
BG					
CY	No employer organisations in sector				
CZ	1 employer organisation in sector				
DE					
DK	1 employer organisation in sector				
EE					
EL					
ES					
FI	1 employer organisation in sector				
FR					
HR	1 employer organisation in sector				
HU					
IE	1 employer organisation in sector				
IT					
LT	No employer organisations in sector				
LU					
LV	No employer organisations in sector				
MT	1 employer organisation in sector				
NL					
PL					
PT					
RO	1 employer organisation in sector				
SE	1 employer organisation in sector				
SI					
SK					
EU27	2	4	15	3	0

Note: Blue shading denotes a positive response.

Source: Network of Eurofound Correspondents' contributions to this study, 2020

2.8. Multisectoralism

The European Commission, as detailed in its 2010 staff working document on the functioning of the ESSDCs, supports and encourages initiatives between ESSDCs and between cross-industry and sectoral European social dialogue bodies. Cooperation and exchange of information between ESSDCs can reinforce the value that European sectoral social dialogue can add, while avoiding duplication of work and divergence of social partners' positions (European Commission, 2010). The following analysis of multisectoralism aims to guide social partners in finding meaningful cooperation with other ESSDCs.

In the data collected for this study, all national food and drink trade unions and employer organisations were asked in which other sectors they also have members. A complete overview of the resulting information is provided in Table 49. Multisectoralism is clearly more prominent among national trade unions than among national employer organisations. The other sectors in which the trade unions and employer organisations most often have members are commerce, agriculture, Horeca, contract catering and sugar. A detailed comparison of the information on the multisectoralism of national sectoral trade unions in this representativeness study and the corresponding information in the representativeness studies for agriculture, commerce, Horeca and contract catering is made in Table 50, indicating the situation for each individual Member State. The overall picture is summarised in Table 32.

Table 32: Other sectors covered by food and drink trade unions and employer organisations, EU27

Sector	90 food and drink trade unions	112 food and drink employer organisations
Commerce	36 trade unions in 13 Member States	5 employer organisations in 5 Member States
Agriculture	27 trade unions in 17 Member States	4 employer organisations in 2 Member States
Horeca	17 trade unions in 12 Member States	2 employer organisations in 2 Member States
Contract catering	16 trade unions in 11 Member States	1 employer organisation in 1 Member State
Sugar	34 trade unions in 18 Member States	10 employer organisations in 10 Member States

Note: See also Table 50.

EFFAT is the European trade union organisation also covering the agriculture, Horeca and contract catering sectors, while UNI Europa covers the commerce sector. At the employers' side, the European employer organisation covering the commerce sector is EuroCommerce, for agriculture it is Geopa-Copa, for Horeca it is Hotrec and for contract catering it is FoodServiceEurope. The May 2020 joint opinion regarding support needed for the hospitality and tourism sector was signed by EFFAT, FoodDrinkEurope, Hotrec and FoodServiceEurope, while the December joint opinion on the vaccine strategy was signed by EFFAT, FoodDrinkEurope and Geopa-Copa (see Table 1). This illustrates how the identified multisectoralism has already brought about cooperation among the European social partner organisations across the different economic sectors.

3. European level of interest representation

This chapter presents detailed data on the representativeness of the European-level social partners in the food and drink sector. There are two social partners listed by the European Commission as social partner organisations to be consulted under Article 154 of the TFEU. The European organisation representing the trade unions, and thus the workforce in this sector, is EFFAT. The employers in the sector are represented at European level by FoodDrinkEurope.

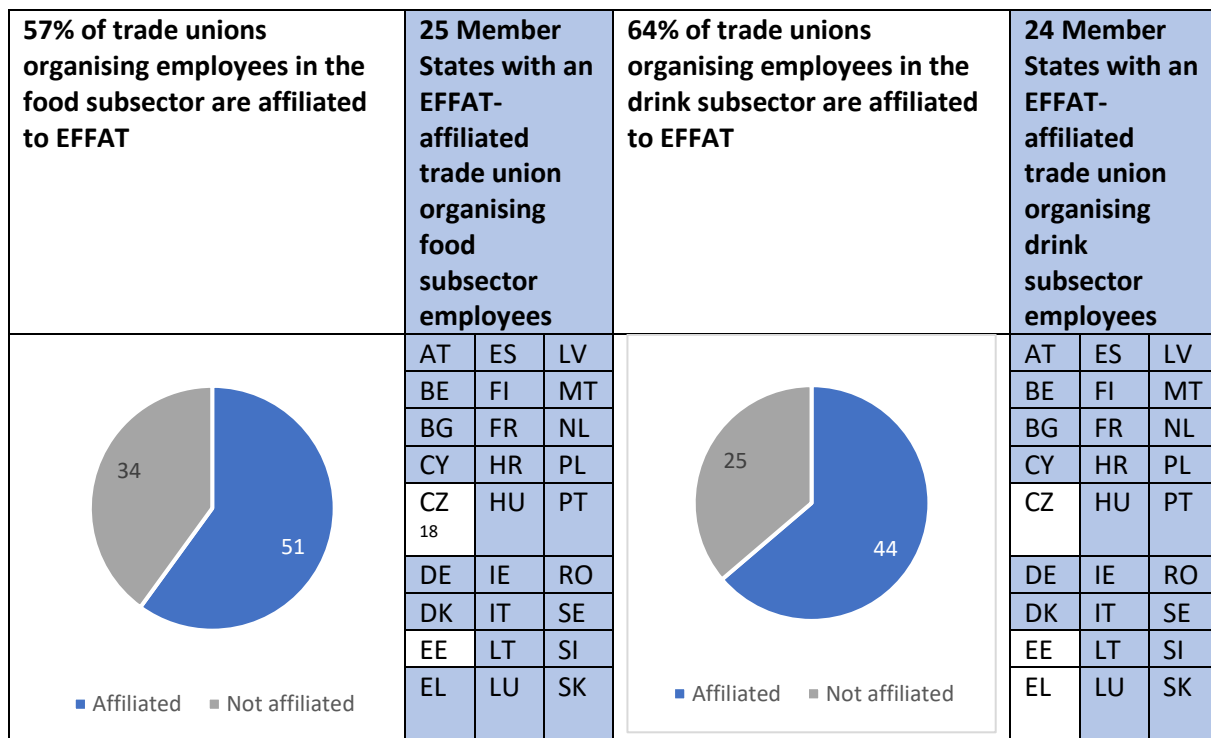
The representativeness of the European-level social partners is assessed in three ways. First, the membership strength of the European-level social partner organisations on both sides is examined, based on the membership domains covered by their national affiliates (in Section 3.1 for the trade unions and in Section 3.3 for the employer organisations). Second, their capacity to negotiate is analysed (in Section 3.8); this means their ability to commit themselves on behalf of their members and to conclude binding agreements or actions that can be implemented or monitored EU-wide. This capacity to negotiate depends on the involvement of their affiliates in collective bargaining at national level, which ensures not only that they can provide an effective mandate for discussion and negotiation at European level, but also that they are in a position to implement European-level agreements. Third, their effective participation in ESSDC meetings is assessed (in Section 3.9).

Finally, the limits of the representativeness of the social partners involved in the ESSDC for the food and drink sector are assessed in two ways: first, by looking at the national organisations not represented by the organisations involved in the ESSDC (in Sections 3.2 and 3.4), and, second, by considering the representativeness of any other European associations in the sector (in Sections 3.5 and 3.6).

3.1. EFFAT membership

EFFAT represents 54 (60%) of the 90 sectoral trade unions, in 25 Member States. The two Member States where EFFAT does not have an affiliated food and drink sector trade union are Czechia and Estonia (Figure 23).

Figure 23: Membership strength of EFFAT for the food and drink subsectors



Source: Table 34

EFFAT was created in 2000 as a regional organisation of the International Union of Food, Agricultural, Hotel, Restaurant, Catering, Tobacco and Allied Workers' Associations (IUF). In addition to representing the interests of workers in the food and drink, agriculture and tourism sectors, EFFAT also represents the interests of domestic workers and workers from other related sectors, services and activities. EFFAT is a member of the European Trade Union Confederation. Table 33 lists all the national trade unions affiliated to EFFAT, providing details about their membership size, sectoral coverage and involvement in collective bargaining.

In 13 countries out of the 25 with EFFAT members, the food and drink sector is not covered entirely by the EFFAT members. The number of segments not covered by EFFAT members is largest in Greece and Luxembourg (13 and 11 segments out of 16, respectively), followed by Hungary, with seven missing segments, and Lithuania, Romania and Slovakia, each with six missing segments. Bulgaria and Malta each lack four segments, Cyprus, Ireland and Poland each lack three segments, and Denmark and Portugal each lack one segment. In the food subsector, the segments that are most commonly not represented are oils and fats manufacturing and fish processing (missing in six countries for both), followed by manufacture of animal feeds (five countries). In the drink subsector, the most prominent are manufacture of fruit wine and cider, manufacture of other beverages and manufacture of malt,

¹⁸ The Czech trade union OSPZV-ASO ČR is affiliated to EFFAT. However, the representatives of this trade union reported to the Network of Eurofound Correspondents that they only organise workers in the agriculture sector and not in food and drink production.

each of which is missing in eight countries, and manufacture of wine from grape, which is missing in five countries.

In terms of organisational density, more than half of the sectoral workforce is covered by the EFFAT members in four Member States (Denmark, Finland, Malta and Sweden), while in three countries the workforce coverage is slightly lower than 50% (Belgium, Luxembourg and Spain). In the majority of the countries (16), the workforce coverage is below 25%.

At trade union level, 60% of all national sectoral trade unions in the EU27 are EFFAT members. Except for the Trade Union Federation of Lithuanian Agricultural Workers (LZUDPSF), all trade unions are involved in collective bargaining. There are no data on sectoral coverage for three trade unions. The food subsector is covered by all trade unions for which sectoral coverage information is available (i.e. 51 trade unions and 94% of all EFFAT members cover the food subsector). The drink subsector also has rather high coverage: 45 trade unions (83% of all EFFAT members) are active in the subsector.

Table 33: Membership domain of EFFAT

MS	Trade union	Number of members in the sector	% of workforce covered	Parts of the sector organised																	Involvement in collective bargaining
				10.1 Meat	10.2 Fish	10.3 Fruit and vegetables	10.4 Oils and fats	10.5 Dairy	10.6 Grain mill products	10.7 Bakery	10.8 Other food	10.9 Animal feeds	10.10 FOOD	11.01 Spirits	11.02 Wine from grape	11.03 Cider and fruit wine	11.04 Other beverages	11.05 Beer	11.06 Malt	11.07 Soft drinks and water	
AT	PRO-GE	8,800	15																		
	GPA-DJP	3,300																			
BE	ACLVB-CGSLB	6,000	45																		
	ACV Voeding en Diensten	24,400																			
	ABVV-FGTB Horval	21,785																			
	ABVV-FGTB BBTk SETCa	n.d.																			
	ACV-CSC Puls	n.d.																			
	ACV-CSC CNE	n.d.																			
BG	FNSZ/ΦHC3	182	3																		
	FSOHP/ΦCOXΠ	1,931																			
	FHPP/ΦXΠΠ	1,000																			
CY	OBI EK-SEK	775	1																		
	OMEPEGE-SEK	470																			
DE	NGG	200,000	23																		

MS	Trade union	Number of members in the sector	% of workforce covered	Parts of the sector organised																			Involvement in collective bargaining
				10.1 Meat	10.2 Fish	10.3 Fruit and vegetables	10.4 Oils and fats	10.5 Dairy	10.6 Grain mill products	10.7 Bakery	10.8 Other food	10.9 Animal feeds	10 FOOD	11.01 Spirits	11.02 Wine from grape	11.03 Cider and fruit wine	11.04 Other beverages	11.05 Beer	11.06 Malt	11.07 Soft drinks and water	11 DRINK		
DK	NNF	15,500	53																				
	3F	>15,000																					
	HK Handel	n.d.		No data available																			
	CO-industri	n.d.		No data available																			
EL	POEET	<26,000	20																				
ES	FI-CCOO	200,000	45																				
	UGT-FICA	30,000																					
	ELA	3,000																					
	FI-USO	1,374																					
FI	SEL	30,000	86																				
	PRO	2,500																					
FR	FGA-CFDT	n.d.	1																				
	FGTA-FO	>10,000																					
	CFTC-CSFV	n.d.																					
	CFE-CGC AGRO	n.d.																					
HR	PPDIV	12,000	18																				
HU	HDSZ	1,125	2																				
	MEDOSZ	1,742																					
IE	SIPTU	13,000	23																				
IT	FAI-CISL	n.d.	n.d.																				
	FLAI-CGIL	n.d.																					
	UILA-UIL	n.d.																					
LT	LMP	n.d.	0																				
	LZUDPSF	80																					
LU	OGB-L	1,256	47																				

Representativeness of the European social partner organisations: Food and drink sector

MS	Trade union	Number of members in the sector	% of workforce covered	Parts of the sector organised																		Involvement in collective bargaining
				10.1 Meat	10.2 Fish	10.3 Fruit and vegetables	10.4 Oils and fats	10.5 Dairy	10.6 Grain mill products	10.7 Bakery	10.8 Other food	10.9 Animal feeds	10 FOOD	11.01 Spirits	11.02 Wine from grape	11.03 Cider and fruit wine	11.04 Other beverages	11.05 Beer	11.06 Malt	11.07 Soft drinks and water	11 DRINK	
LV	LIA	200	1																			
MT	GWU	4,000	75																			
NL	FNV	n.d.	n.d.																			
	CNV Vakmensen	n.d.																				
PL	SPS NSZZ	9,339	2																			
PT	SETAAB	435	0																			
RO	CERES	7,380	15																			
	Sindalimenta	25,000																				
SE	HRF	n.d.	70	No data available																		
	Livs	27,000																				
	Unionen	7,281																				
SI	S KŽI	>2,500	11																			
SK	OZP SR	2,580	5																			
	OZPP SR	65																				
EU27	Out of the 90 TUs	54 60%	Out of the 54 EFFAT members	22 41 (76%)	19 38 (70%)	22 42 (78%)	19 39 (72%)	22 43 (80%)	21 40 (74%)	23 40 (74%)	25 47 (87%)	20 39 (72%)	25 51 (94%)	22 40 (74%)	20 38 (70%)	17 34 (63%)	17 34 (63%)	23 41 (76%)	17 33 (61%)	23 42 (77%)	24 44 (81%)	25 53 (98%)
	Number of MSs	25	Out of the 25 MSs	22	19	22	19	22	21	23	25	20	25	22	20	17	17	23	17	23	24	25

Notes: Coloured shading denotes a positive response. Dark green shading indicates organisations covering at least one part of the sector. TU, trade union.

Source: Network of Eurofound Correspondents' contributions to this study, 2020

Table 34: Representativeness details of EFFAT, showing members in the different parts of the sector

			10.1 Meat	10.2 Fish	10.3 Fruit and vegetables	10.4 Oils and fats	10.5 Dairy	10.6 Grain mill products	10.7 Bakery	10.8 Other food	10.9 Animal feeds	10 FOOD	11.01 Spirits	11.02 Wine from grape	11.03 Cider and fruit wine	11.04 Other beverages	11.05 Beer	11.06 Malt	11.07 Soft drinks and water	11 DRINK	TU involvement in collective bargaining
All TUs	90	Number of TUs	60	55	58	51	63	55	56	64	55	85	55	54	46	45	63	43	59	69	89
EFFAT members	54 TUs (60%)	Number of TUs affiliated to EFFAT	41	38	42	39	43	40	40	47	39	51	40	38	34	34	41	33	41	45	53
	% of all EFFAT members		76	70	78	72	80	74	74	87	72	94	74	70	63	63	76	61	76	83	98
	% of TUs representing each segment affiliated to EFFAT		68	69	72	76	68	73	71	73	71	60	73	70	74	76	65	77	69	65	60
MSs with EFFAT members	25	Number of MSs	22	19	22	19	22	21	23	25	20	25	22	20	17	17	23	17	23	24	25

Note: TU, trade union.

Source: Authors' own calculations, based on Network of Eurofound Correspondents' contributions to this study, 2020

Table 35 gives an overview of whether the largest trade unions in the sector at national level are affiliated to EFFAT, of whether they cover all fields of activity in the sector and of the existence and relevance of other trade unions and other European organisations in all EU Member States. The largest trade union is affiliated to EFFAT in a total of 20 Member States, and in 16 countries the second largest trade union is affiliated to EFFAT. In Czechia and Estonia, there are no EFFAT affiliates. In Greece and Portugal, neither the largest nor the second largest trade union is an EFFAT affiliate. This leaves a total of 23 Member States with at least one of the two largest trade unions affiliated to EFFAT. In 18 countries, other trade unions, besides the EFFAT affiliates, are active, but in most cases their relevance, bargaining strength and representativeness are considered to be weak and they are considered to play only a minor role in the sector. Still, there are cases in which the non-affiliates are very important as a result of being the only trade union in the sector (Estonia), being the largest in the sector (Hungary) or having wider coverage than EFFAT affiliates (Cyprus, Latvia and Portugal).

Table 35: European affiliation of the largest and second largest trade unions

MS	The largest TU is affiliated to EFFAT	The second largest TU is affiliated to EFFAT	All types of activities are covered	There are sectoral TUs not affiliated to EFFAT	Representativeness of the TUs that are not members of EFFAT	Existence of any other European trade union associations with representativeness in the sector
AT						
BE						
BG					Lower than that for EFFAT members	
CZ	No EFFAT members				70% of sectoral workforce (it is the only TU in the sector)	
CY					Roughly equal to that for EFFAT members	
DE		1 TU in sector				
DK						
EE	No EFFAT members				Very low	
EL					Lower than that for EFFAT members	
ES					Very low (covers only NACE 10.2)	
FI					Very low compared with that for EFFAT members	
FR					Very low	
HR					Very low, company level	
HU					Higher than that for EFFAT members	
IE					Lower than that for EFFAT members	
IT					Very low	
LT						
LU					Lower than that for EFFAT members	
LV					Higher than that for EFFAT members	
MT					Considerably lower than that for EFFAT members	
NL						
PL					Slightly lower than that for EFFAT members	
PT					Higher than that for EFFAT members	
RO						
SE					Considerably lower than that for EFFAT members	
SI						
SK						
EU27	20	16	12	18		6

Note: Green shading denotes a positive response. TU, trade union.

Source: Network of Eurofound Correspondents' contributions to this study, 2020

3.2. National trade unions not represented in the ESSDC

This section takes a closer look at those trade unions not affiliated to EFFAT, providing an overview of the limits and potentials of the membership level of EFFAT. Table 36 presents the details of those trade unions. Altogether, 17 Member States have trade unions not represented by EFFAT. In around half of the countries (Bulgaria, Croatia, Cyprus, Greece, Hungary, Ireland, Poland, Portugal and Sweden), there are several such trade unions. In Czechia and Estonia, the trade unions not represented by EFFAT are the only sector-relevant trade unions in the country.

The proportion of the workforce covered by the trade unions is rather small in the vast majority of countries. It is highest in Czechia, with 70%, followed by Luxembourg, with 23%, and Malta, with 14%. In the rest of the countries, the workforce coverage is below 12%. In 3 of the 17 countries (Italy, Portugal and Sweden), all parts of the sector are covered by one trade union or a combination of several trade unions. In other countries, only some of the sectoral segments are covered by those trade unions not affiliated to EFFAT.

Those trade unions not affiliated to EFFAT account for 40% (36 trade unions) of all national sectoral trade unions, and all of these trade unions are involved in collective bargaining. There are two trade unions not covering the food subsector (in Croatia and Ireland) and 12 not covering the drink subsector. In most cases, the trade unions have narrow width, covering 1–5 segments each (20 trade unions, 56%). Full coverage (all segments) is recorded for eight trade unions (22%). This leaves a further eight trade unions (22%) with medium or wide coverage. Overall, the coverage of each food and drink segment is 28–61%, being on average 44%. Overall, this is lower than for EFFAT members (73%).

Table 36: Characteristics of trade unions not represented in the ESSDC

MS	Trade union	Number of members in the sector	% of sectoral workforce	Parts of the sector organised																	Involvement in collective bargaining	
				10.1 Meat	10.2 Fish	10.3 Fruit and vegetables	10.4 Oils and fats	10.5 Dairy	10.6 Grain mill products	10.7 Bakery	10.8 Other food	10.9 Animal feeds	10 FOOD	11.01 Spirits	11.02 Wine from grape	11.03 Cider and fruit wine	11.04 Other beverages	11.05 Beer	11.06 Malt	11.07 Soft drinks and water		11 DRINK
BG	SBHN/СБХН	606	1																			
	NSFTKTU/ HCΦTKTY	80																				
CY	SEBETTYK-PEO	794	1																			
	Segdamelin- PEO	515																				
CZ	NOS PPP	7,173	70																			
EE	ETTAF	18	0																			

MS	Trade union	Number of members in the sector	% of sectoral workforce	Parts of the sector organised																	Involvement in collective bargaining
				10.1 Meat	10.2 Fish	10.3 Fruit and vegetables	10.4 Oils and fats	10.5 Dairy	10.6 Grain mill products	10.7 Bakery	10.8 Other food	10.9 Animal feeds	10 FOOD	11.01 Spirits	11.02 Wine from grape	11.03 Cider and fruit wine	11.04 Other beverages	11.05 Beer	11.06 Malt	11.07 Soft drinks and water	
EL	POEUGTP	9,000	8																		
	POEK	750																			
	OEXBE	<600																			
ES	CIG – FGAMT	2,000	2																		
FI	MVL	1,800	5																		
HR	NSR PHP	650	1																		
	NSZP	250																			
HU	EMFSZ	615	3																		
	ÉDSZ	3,349																			
	GMDSZ	295																			
IE	GSU	1,400	6																		
	Connect TU	1,000																			
	DEA	700																			
IT	UGL Agro-alimentare	n.d.	n.d.																		
LU	LCGB	628	23																		
LV	LLPNA	777	3																		
MT	UHM	720	14																		
PL	FZZPM	3,200	1																		
	FZZPC	2,500																			
	FZZPPS	500																			

Representativeness of the European social partner organisations: Food and drink sector

MS	Trade union	Number of members in the sector	% of sectoral workforce	Parts of the sector organised																	Involvement in collective bargaining	
				10.1 Meat	10.2 Fish	10.3 Fruit and vegetables	10.4 Oils and fats	10.5 Dairy	10.6 Grain mill products	10.7 Bakery	10.8 Other food	10.9 Animal feeds	10 FOOD	11.01 Spirits	11.02 Wine from grape	11.03 Cider and fruit wine	11.04 Other beverages	11.05 Beer	11.06 Malt	11.07 Soft drinks and water		11 DRINK
PT	FESAHT	10,000	11																			
	CESP	1,100																				
	Sindepescas	250																				
	Sitese	420																				
	Sinticaba	250																				
	Union of Professionals in Dairy, Food, Agriculture, Offices, Trade, Services, Road Transport, Metalworking, Construction and Woodworking	150																				
	Union of Workers in Manufacturing and Commerce of Meat of the South	400																				
SE	Handels	300	6																			
	Sveriges Ingenjörer	500																				
	Ledarna	2,200																				
EU27	36 (out of 90) TUs in 17 MSs are not represented		TUs	19	17	16	12	20	15	16	17	16	34	15	16	12	11	22	10	18	24	36
			%	53	47	44	33	56	42	44	47	44	94	42	44	33	31	61	28	50	67	100
			MSs	12	10	9	6	14	9	11	11	9	17	10	11	7	6	15	5	12	15	17

Notes: Coloured shading denotes a positive response. Dark green shading indicates organisations covering at least one part of the sector. n.d., no data available; TU, trade union.

Sources: Eurostat, Labour Force Survey, 2019 (data from 2018 were used for Latvia and Sweden); Network of Eurofound Correspondents' contributions to this study, 2020

3.3. FoodDrinkEurope membership

The European-level social partner organisation representing employer organisations in the sector is FoodDrinkEurope. The creation of FoodDrinkEurope dates back to 1982, when the Union of Industrial and Employers' Confederations of Europe (now BusinessEurope) founded the Confederation of Food and Drink Industries of the EEC (CIAA), replacing its Commission of Food and Drink Industries. In 2011, the CIAA was renamed FoodDrinkEurope. It represents the food and drink industry's traditions and potentials in three core areas: food and consumer policy (food safety and science, nutrition and health), environmental sustainability and competitiveness.

FoodDrinkEurope has three types of members, as set out in Article 5 of its statutes.

1. National food and drink umbrella associations, of which most cover both food and drink activities.
2. European associations covering specific parts of the sector (listed in Table 39). Their member organisations are also directly affiliated to the national associations.
3. Multinational companies operating in several EU Member States (listed in Section 3.3).

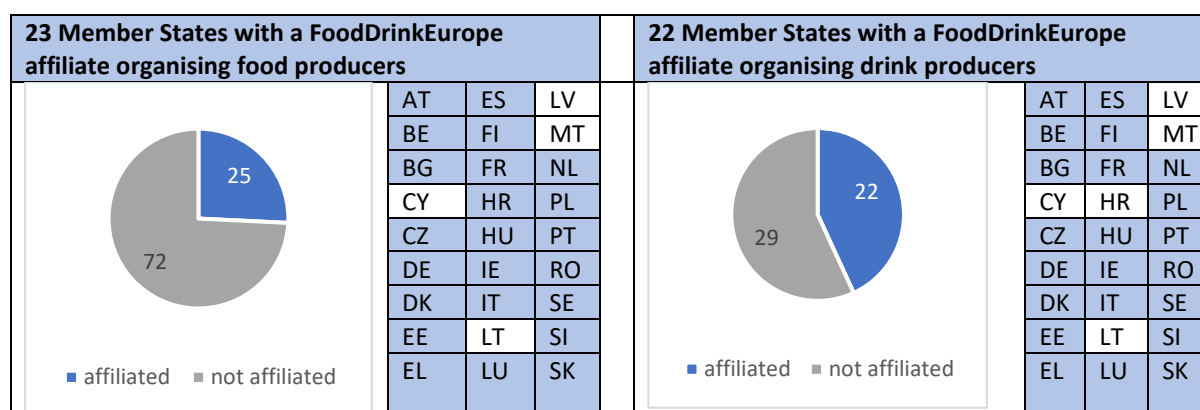
Affiliated national associations are the most important of the associations for the assessment of the representativeness of FoodDrinkEurope, for the following two reasons.

- Most of the national member organisations of the European associations are also affiliated to the national associations affiliated to FoodDrinkEurope.
- In several countries, the directly affiliated multinational companies are also members of the national associations, and as such are indirectly affiliated to FoodDrinkEurope.

Therefore, the assessment of representativeness is best based on the affiliated national associations, as adding up the European subsector associations and the directly affiliated multinational companies would lead to double counting.

In the EU27, FoodDrinkEurope has a total of 25 affiliated national associations in 23 Member States (Figure 24). FoodDrinkEurope has no affiliated national associations from Cyprus, Latvia, Lithuania or Malta. In 11 countries (Croatia, Czechia, Denmark, Estonia, Finland, Hungary, Ireland, Luxembourg, Poland, Romania and Sweden), the organisations represented by FoodDrinkEurope are the only employer organisations in the country. Table 37 presents all the national employer organisations affiliated to FoodDrinkEurope, providing details about their membership size, sectoral coverage and involvement in collective bargaining.

Figure 24: Membership strength of FoodDrinkEurope for the food and drink subsectors



Source: Table 34

In 11 of the 23 countries, the food and drink sector is not covered entirely by the FoodDrinkEurope members. Croatia and Bulgaria have the largest numbers of sectoral segments not covered by FoodDrinkEurope members (15 and 11 segments out of 16, respectively), followed by Portugal, with nine missing segments. Hungary and Luxembourg each have seven missing segments, Poland and Slovakia each have six missing segments, Greece has four missing segments and Austria, Estonia and Ireland each have three missing segments.

In the food subsector, fish processing is the segment most commonly missing (eight countries), followed by animal feeds and oils and fats manufacturing (five and four countries, respectively). In the drink subsector, the most commonly missing are manufacture of cider and fruit wine and manufacture of wine from grape, which are each missing in nine countries, and manufacture of other beverages and manufacture of malt, which are each missing in eight countries.

The membership density of the FoodDrinkEurope members is highest in Croatia, at 30%. However, in the food subsector in Croatia, only manufacture of bakery products is represented. Drink producers from Croatia are not represented in FoodDrinkEurope. In six countries, the organisational density in terms of companies covered is between 10% and 18%, overall covering most of the activities in the sector. In the remaining 10 countries, where information is available, the density is below 10%.

The FoodDrinkEurope membership in the EU27 accounts for 22% (25 organisations) of all national sectoral employer organisations. Of those, 52% (13 organisations) are involved in collective bargaining. In terms of sectoral coverage, all employer organisations in the food and drink subsector cover at least one segment of the food subsector, while 22 organisations cover at least one segment of the drink subsector. Overall, each segment in the sector is covered by more than half of the FoodDrinkEurope members.

Table 37: Membership domain of FoodDrinkEurope

MS	Employer organisation	Number of members in the sector	% of companies covered	Parts of the sector organised																	Involvement in collective bargaining
				10.1 Meat	10.2 Fish	10.3 Fruit and vegetables	10.4 Oils and fats	10.5 Dairy	10.6 Grain mill products	10.7 Bakery	10.8 Other food	10.9 Animal feeds	10.10 FOOD	11.01 Spirits	11.02 Wine from grape	11.03 Cider and fruit wine	11.04 Other beverages	11.05 Beer	11.06 Malt	11.07 Soft drinks and water	
AT	FVNG (FIAA)	200	5																		
BE	FEVIA	700	10																		
BG	SHNB/CXH5	36	1																		
CZ	PK ČR	156	17																		
DE	Lebensmittelverband Deutschland	>240	1																		
DK	DI Fødevarer	60	4																		
EE	ETL	100	14																		
EL	SEVT	n.d.	n.d.																		
ES	FIAB	3,085	11																		
FI	ETL	270	15																		
FR	ANIA	n.d.	n.d.																		

Representativeness of the European social partner organisations: Food and drink sector

MS	Employer organisation	Number of members in the sector	% of companies covered	Parts of the sector organised																	Involvement in collective bargaining	
				10.1 Meat	10.2 Fish	10.3 Fruit and vegetables	10.4 Oils and fats	10.5 Dairy	10.6 Grain mill products	10.7 Bakery	10.8 Other food	10.9 Animal feeds	10 FOOD	11.01 Spirits	11.02 Wine from grape	11.03 Cider and fruit wine	11.04 Other beverages	11.05 Beer	11.06 Malt	11.07 Soft drinks and water		11 DRINK
HR	HUP UPIIP	974	30																			
HU	FÉSZ	>500	7																			
IE	Food Drink Ireland IBEC	n.d.	n.d.																			
IT	Federalimentare	7,000	13																			
LU	FIAL	17	11																			
NL	FNLI	500	9																			
	COV	42																				
	NVB	40																				
PL	PFPZ	>30	0																			
PT	FIPA	n.d.	n.d.																			
RO	Romalimenta	26	0																			
SE	Li	800	18																			
SI	GZS – ZKŽP	223	9																			
SK	PKS	30	1																			
EU27	Out of the 112 EOs	25 22%	Out of the 25 FoodDrink Europe members	22 (88%)	15 (60%)	21 (84%)	19 (76%)	22 (88%)	20 (80%)	23 (92%)	21 (84%)	18 (72%)	25 (100%)	17 (68%)	14 (56%)	14 (56%)	15 (60%)	18 (72%)	15 (60%)	22 (88%)	22 (88%)	13 (52%)
	Number of MSs	23	Out of the 23 MSs	21	15	21	19	22	20	22	21	18	23	17	14	14	15	18	15	22	22	12

Notes: Light blue shading denotes a positive response. Dark blue shading indicates organisations covering at least one part of the sector. Green shading denotes umbrella organisations. The unshaded member organisations are subsectoral organisations involved in collective bargaining that are indirectly affiliated through the umbrella organisations (shaded green). The member organisations shaded grey are like the umbrella organisations; they have a wider membership domain, covering almost all food and drink activities. The only exception is the Croatian national association HUP UPIIP, which covers only bakery activities in Croatia. EO, employer organisation; n.d., no data available.

Sources: Network of Eurofound Correspondents' contributions to this study, 2020; Eurostat, Structural Business Statistics, 2017 (data from 2013 and 2014 were used for Ireland)

Table 38 gives an overview of whether the largest employer organisations in the sector are FoodDrinkEurope affiliates, of whether they cover all fields of activity in the sector and of the existence of other employer organisations in the country and other European organisations in all EU Member States. The largest employer organisations are FoodDrinkEurope affiliates in a total of 21 Member States, and the second largest are in two Member States. Cyprus, Latvia, Lithuania and Malta have no FoodDrinkEurope affiliations. Overall, at least one of the largest employer organisations has a FoodDrinkEurope affiliation in 23 Member States. In 10 countries, besides the FoodDrinkEurope affiliates, there are also other active employer organisations.

Table 38: European affiliation of the largest and second largest employer organisations

MS	The largest EO is affiliated to FoodDrink Europe	The second largest EO is affiliated to FoodDrink Europe	All types of activities are covered	There are sectoral EOs not affiliated to FoodDrink Europe	Representativeness of the EOs that are not members of FoodDrinkEurope	Existence of any other European EOs with representativeness in the sector
AT					No information available	
BE					Lower than that for FoodDrinkEurope members	
BG					Higher than that for FoodDrinkEurope members	
CZ		1 EO in sector				
CY	No EOs in sector					
DE					Non-members are affiliated to FoodDrinkEurope member	
DK		1 EO in sector				
EE		1 EO in sector				
EL					No information available	
ES					Lower than that for FoodDrinkEurope members	
FI		1 EO in sector				
FR					No information available	
HR		1 EO in sector				
HU		1 EO in sector				
IE		1 EO in sector				
IT					Lower than that for FoodDrinkEurope members	
LT	No EOs in sector					
LU		1 EO in sector				
LV	No EOs in sector					
MT						
NL					Higher than that for FoodDrinkEurope members	
PL		1 EO in sector				
PT					Higher than that for FoodDrinkEurope members	
RO		1 EO in sector				
SE		1 EO in sector				
SI					Roughly similar to that for FoodDrinkEurope members	
SK					Higher than that for FoodDrinkEurope members	

MS	The largest EO is affiliated to FoodDrink Europe	The second largest EO is affiliated to FoodDrink Europe	All types of activities are covered	There are sectoral EOs not affiliated to FoodDrink Europe	Representativeness of the EOs that are not members of FoodDrinkEurope	Existence of any other European EOs with representativeness in the sector
EU27	21	2	12	13		10

Note: Blue shading denotes a positive response. EO, employer organisation.

Source: Network of Eurofound Correspondents' contributions to this study, 2020

Table 39: European associations affiliated to FoodDrinkEurope

Abbreviation	Full name of the association	Type of members	Number of Member States with affiliated associations, and number of member companies (where available)
AIJN	European Fruit Juice Association	Associations and companies	15 Member States
Caobisco	Association of Chocolate, Biscuit and Confectionery Industries of Europe	Associations and companies	15 Member States
Ceereal	European Breakfast Cereal Association	Associations and companies	9 member associations in 8 Member States 14 member company
CEFS	European Committee of Sugar Manufacturers	Companies	CEFS is an EU social partner in the sugar ESSDC
Clitravi	Liaison Centre for the Meat Processing Industry in the European Union	Associations	20 Member States
COFALEC	Confederation of EU Yeast Producers	Associations and companies	22 Member States
ECF	European Coffee Federation	Associations and companies	Associations from 12 Member States 35 member companies
EDA	European Dairy Association	Associations	18 Member States and associated associations in 2 other Member States
ENSA	European Natural Soy and Plant-Based Foods Manufacturers Association	Companies	Companies from 5 Member States and 1 associated company from another Member State Some of these companies are multinationals producing in several Member States
ESA	European Snacks Association	Companies	59 member companies Claims to represent 80% of the EU market of snacks
ESA	European Spice Association	Associations and companies	Member associations in 9 Member States and member companies in another 7 Member States
EUPPA	European Potato Processors' Association	Associations and companies	6 Member States 15 member companies, accounting for 90% of processed potato production in Europe

Abbreviation	Full name of the association	Type of members	Number of Member States with affiliated associations, and number of member companies (where available)
EuroGlaces	European Ice Cream Association	Associations and companies	Associations and companies from 8 Member States
FEDIAF	European Pet Food Industry Federation	Associations and companies	18 Member States and 5 member companies
Fedima	Federation of European Manufacturers and Suppliers of Ingredients to the Bakery, Confectionery and Patisseries Industries	Associations	13 Member States
IMACE	European Margarine Association	Companies	11 member companies
NMWE	Natural Mineral Water Europe	Associations and companies	21 national business associations 7 directly affiliated companies
Profel	European Association of Fruit and Vegetable Processors	Associations and companies	11 Member States Its members (500+ companies) employ more than 80,000 people in Europe
SNE	Specialised Nutrition Europe	Associations	National associations in 17 Member States
spiritsEUROPE	spiritsEUROPE	Associations and companies	National associations in 21 Member States and 11 member companies
Starch Europe	Starch Europe	Companies	28 member companies
BoEU	Brewers of Europe	Associations	National associations of 26 Member States
THIE	Tea & Herbal Infusions Europe	Associations and companies	Associations and companies from 11 Member States
UNAFPA	Union of Organisations of Manufacturers of Pasta Products of the EU	Associations and companies	Associations and companies from 8 Member States
UNESDA	Union Of European Soft Drinks Associations	Associations and companies	23 Member States 9 multinational companies

Source: Network of Eurofound Correspondents' contributions to this study, 2020

The following companies are affiliated to FoodDrinkEurope:

- AB InBev
- ADM
- Cargill
- Coca-Cola
- Danone
- DSM
- Ferrero
- GB Foods

- General Mills
- IFF
- Kellogg
- Kerry Group
- Kraft Heinz
- Mars
- McCain
- Mondelez
- Nestlé
- PepsiCo
- Roquette
- Südzucker
- Tate & Lyle
- Ülker
- Unilever

3.4. National employer organisations not represented in the ESSDC

This section takes a closer look at those employer organisations not affiliated to FoodDrinkEurope, giving an overview of the limits and potentials of the membership level of FoodDrinkEurope.

In Table, the details of those employer organisations are presented. Altogether, 13 Member States have employer organisations not represented by FoodDrinkEurope. In most of those countries (10), there are several such employer organisations. In Malta, the employer organisation not represented by FoodDrinkEurope is the only sectoral employer organisation in the country.

The share of companies that are members of FoodDrinkEurope-affiliated employer organisations is highest in Italy (66%) and Germany (46%), followed by the Netherlands (29%) and Portugal (21%). In the other eight countries, it is below 16%. In Italy and Slovenia, all parts of the food and drink sector are covered by one employer organisation or a combination of several employer organisations. In other countries, only some of the sectoral segments are covered by those employer organisations not affiliated to FoodDrinkEurope. The food subsector is at least partly covered by one employer organisation or a combination of several employer organisations in all countries, whereas the drink subsector is at least partly covered in 10 countries.

Those employer organisations not affiliated to FoodDrinkEurope account for 73% (82) of all national sectoral employer organisations. However, all of the organisations are involved in collective bargaining. The sectoral coverage is significantly lower than that for the members of FoodDrinkEurope. Some 83% of employer organisations (68) cover parts of the food subsector and 33% (27) cover parts of the drink subsector. The vast majority of the organisations (68 in total, 83%) have narrow width, being active in 1–5 segments in the sector. Eight organisations (10%) cover all segments, while five organisations (6%) cover 6–13 segments. Overall, the coverage of each segment is 13–34%, being on average 25%, which is significantly lower than that for FoodDrinkEurope affiliates (74%).

Table 40: Characteristics of employer organisations not represented in the ESSDC

MS	Employer organisation	Number of members in the sector	% of all companies	Parts of the sector covered																	Involvement in collective bargaining
				10.1 Meat	10.2 Fish	10.3 Fruit and vegetables	10.4 Oils and fats	10.5 Dairy	10.6 Grain mill products	10.7 Bakery	10.8 Other food	10.9 Animal feeds	10.10 FOOD	11.01 Spirits	11.02 Wine from grape	11.03 Cider and fruit wine	11.04 Other beverages	11.05 Beer	11.06 Malt	11.07 Soft drinks and water	
AT	BILG	n.d.	n.d.																		
BE	FGBB	30	0																		
BG	SPZZP/СПЗЗП	11	7																		
	SPKF/СПКФ	73																			
	AMB/АМБ	105																			
	SPB/СПБ	19																			
	NBPS/НБПС	248																			
DE	BDSI	225	46																		
	VdZ	4																			
	Verband deutscher Großbäckereien	n.d.																			
	Zentralverband des Deutschen Bäckerhandwerks	10,491																			
EL	SEV	n.d.	15																		
	GSEVEE	2,400																			
ES	ANICE	600	8																		
	Fenaval	225																			
	AFHSE	70																			
	Conxemar	244																			
	CESFAC	320																			
	Produlce	66																			
	FENIL	60																			
	ANEABE	58																			
	FEV	700																			
	Anfabra	20																			

Representativeness of the European social partner organisations: Food and drink sector

MS	Employer organisation	Number of members in the sector	% of all companies	Parts of the sector covered																	Involvement in collective bargaining
				10.1 Meat	10.2 Fish	10.3 Fruit and vegetables	10.4 Oils and fats	10.5 Dairy	10.6 Grain mill products	10.7 Bakery	10.8 Other food	10.9 Animal feeds	10 FOOD	11.01 Spirits	11.02 Wine from grape	11.03 Cider and fruit wine	11.04 Other beverages	11.05 Beer	11.06 Malt	11.07 Soft drinks and water	
FR	Alliance 7	241	4																		
	FNIL	282																			
	Culture Viande	72																			
	FEDEV	225																			
	FICT	193																			
	ANMF	231																			
	BRF	6																			
	ABF	118																			
	FEDALIM	58		No data available																	
	CSEM	6																			
	SNSF	4																			
	SNIPO	43																			
	Adepale	186																			
	CVNVS	508																			
IT	Confartigianato Alimentazione	36,353	66																		
	I Alimentare	n.d.																			
	Casartigiani	n.d.																			
	CLAAI	n.d.																			
	Legacoop Agroalimentare	n.d.																			
	Agrital – AGCI	<507																			
	Fedagri-Confcooperative	n.d.																			
MT	MEA	14	4																		
NL	NZO	13	29																		
	VIGEF	62																			
	FWS	21																			
	AKSV	33																			
	VBZ	100																			
	Gemzu	n.d.																			
	NEPLUVI	57																			
	NEVEDI	92																			
	NBOV	<1,130																			
	KVNW	130																			
	SpiritsNL	26																			
	VisNed	7																			
	VNV (fish)	<200																			
VNV (meat)	32																				

Representativeness of the European social partner organisations: Food and drink sector

MS	Employer organisation	Number of members in the sector	% of all companies	Parts of the sector covered																	Involvement in collective bargaining	
				10.1 Meat	10.2 Fish	10.3 Fruit and vegetables	10.4 Oils and fats	10.5 Dairy	10.6 Grain mill products	10.7 Bakery	10.8 Other food	10.9 Animal feeds	10 FOOD	11.01 Spirits	11.02 Wine from grape	11.03 Cider and fruit wine	11.04 Other beverages	11.05 Beer	11.06 Malt	11.07 Soft drinks and water		11 DRINK
PT	Ancipa	400	21																			
	Casa do Azeite	65																				
	ANIL	50																				
	APIM	n.d.																				
	ANIA	5																				
	AICC	39																				
	IACA	69																				
	APIAM	17																				
	Ancave	n.d.																				
	ITA	4																				
	ALIF	n.d.																				
	ANICP	24																				
	AIT	6																				
	ACIP	630																				
	AIPAN	700																				
	AIPL	205																				
	Asimpala	133																				
	ADCP	n.d.																				
SI	ZZS	60	10																			
	ZDS	200																				
SK	SCS	2	0																			
	SZVPS	8																				
	ZVLal	8																				
EU27	82 EOs (out of 112) in 13 MSs are not represented		EOs	23	17	18	14	20	17	28	26	15	68	14	14	12	13	13	11	21	27	82
			73%	28%	21%	22%	17%	24%	21%	34%	32%	18%	83%	17%	17%	15%	16%	16%	13%	26%	33%	100%
			MSs	10	7	8	7	10	8	11	12	8	13	7	7	5	6	5	5	9	10	13

Notes: Coloured shading denotes a positive response. Dark blue shading indicates organisations covering at least one part of the sector. Dark green shading denotes umbrella organisations. Light green shading denotes the member organisations of an umbrella organisation. EO, employer organisation; n.d., no data available.

Sources: Network of Eurofound Correspondents' contributions to this study, 2020; Eurostat, Structural Business Statistics, 2017 (data from 2013 and 2014 were used for Ireland)

3.5. Other European trade union organisations

An overview of national trade unions' affiliations to European associations other than EFFAT is provided in **Error! Reference source not found.**. None of these associations has affiliates from more than five Member States.

The organisations shaded grey in Table 41 are not related to the food and drink sector; trade unions covering the food and drink sector are affiliated to them for their members from other sectors. In addition, the IUF can be ignored as this is a global trade union organisation to which most of the EFFAT members in the sector are also affiliated.

This leaves only three other European associations (shaded green in Table 41), each with one affiliated food and drink trade union in one Member State. These are AEDIL, EZA and EUCDW. The three national sectoral trade unions affiliated to these are all already represented by EFFAT in the ESSDC.

AEDIL deals with the dairy sector. The Netherlands is the only country with an affiliate. The other organisations mentioned do not deal directly with the food and drink sector as they are concentrated on horizontal topics (such as education, as is the case for the EZA) or forming their membership base on the basis of something other than sector (such as religion, as is the case for the EUCDW).

Table 41: Other EU trade union associations with food and drink sector national trade unions as members

Other EU trade union associations			Member States with an affiliate according to the organisation's website	Member States with a food and drink sector affiliate
Abbreviation	Full name	Assessment of sector-relatedness		
UNI Europa	European Services Workers' Union	Does not cover food and drink	27	5 (AT, BE, FI, FR, PT), of which 4 (AT, BE, FI, FR) are affiliated to EFFAT
IndustriAll Europe	IndustriAll European Trade Union	Does not cover food and drink	27	5 (AT, CY, EE, ES, LV), of which 4 (AT, CY, ES, LV) are affiliated to EFFAT
IUF	International Union of Food, Agricultural, Hotel, Restaurant, Catering, Tobacco and Allied Workers' Associations	The IUF is an international trade union organisation covering a variety of industries from agriculture to food and drink production and Horeca, thus covering a large share of the food chain.	25 (excluding EE, PT)	3 (ES, HR, SK), all of which are affiliated to EFFAT
ETUC	European Trade Union Confederation	ETUC is a cross-industry peak-level European trade union organisation. ETUC comprises 90 national organisations from 38 countries.	27	3 (MT, NL, SE), all of which are affiliated to EFFAT

AEDIL	Association of European Dairy Industry Learning	AEDIL promotes and protects the dairy profession and the dairy sector in Europe and contributes to the coordination and adaptation of dairy-related education. The organisation has a total of 15 members.	11 (AT, DE, DK, FI, FR, IE, IT, LU, NL, PL, SE)	1 (FI), which is not affiliated to EFFAT
EZA	European Centre for Workers' Questions	The EZA is committed to the education of workers and uniting workers' organisations, unions and educational institutions in 29 European countries. It has 70 members.	23 (excluding EE, FI, IE, SE)	1 (MT), which is not affiliated to EFFAT
ETF	European Transport Federation	Transport workers' federation	27	1 (AT), which is affiliated to EFFAT
EUCDW	European Union of Christian Democratic Workers	The EUCDW unites Christian democratic workers' organisations from all sectors. It has 24 member organisations from 18 European countries, including Christian democratic trade unions, Christian social movements and workers' associations in political parties.	15 (AT, BE, CZ, DE, EL, ES, HU, IE, IT, LU, MT, NL, PT, RO, SI)	1 (NL), which is affiliated to EFFAT
Eurofedop	European Federation of Public Service Employees	Eurofedop unites 41 public service trade unions from 23 countries. Does not seem to be food-related. Its website refers to the creation of the following trade councils in order to increase co-operation between members: postal services and telecommunications; local and regional authorities; ministries and finances; health services; police; defence; and justice.	16 (AT, BE, DE, DK, EL, ES, FR, HU, IE, LT, MT, NL, PT, RO, SI, SK)	1 (MT), which is not affiliated to EFFAT

Source: Network of Eurofound Correspondents' contributions to this study, 2020

3.6. Other European employer organisations and EU business associations

An overview of the membership of the national employer organisations/business associations is provided in Tables 42 and 43. In contrast to the case of trade unions, the number of other European organisations with affiliates among national food and drink sector employer organisations is quite large. A total of 60 organisations were identified in this study. However, most of the organisations (47) have affiliates from only one or two Member States. All of the organisations focus on specific parts of the food and drink sector (e.g. meat processing, manufacture of dairy products, fruit and vegetable processing), so there are no organisations covering the food and drink sector as a whole. The most prominent of these organisations, based on this study, are the EDA, which deals with manufacture of

dairy products, and FEFAC, which deals with animal feeds (both have affiliates from six Member States). Five countries have organisations affiliated to Brewers of Europe.

Table 42: Other EU associations not affiliated to FoodDrinkEurope with food and drink sector national employer organisations/business associations as members

Other EU employer organisation			Member States with an affiliate according to the organisation's website	Member States with a food and drink sector affiliate
Abbreviation	Full name	Assessment of sector-relatedness		
FEFAC	European Feed Manufacturers' Federation	FEFAC represents and promotes the interests of the European compound feed and premix industry. It has 22 full members, 6 associate members and 2 observer members from a total of 27 countries.	21 (excluding EE, EL, HR, LU, LV, MT)	6 (AT, BG, ES, FI, PT, SI), of which 3 (AT, FI, SI) are affiliated to FoodDrinkEurope
AIPCE-CEP	EU Fish Processors and Traders Association	AIPCE-CEP represents companies related to fish. The association represents a total of 22 associations from 15 countries, accounting for more than 3,900 enterprises and 128,000 employees (80% representativeness at EU level).	12 (BE, DE, DK, ES, FI, FR, IE, IT, NL, PL, PT, SE)	3 (ES, FI, NL), of which 1 (FI) is affiliated to FoodDrinkEurope
EFM	European Flour Millers	EFM is the association representing the European wheat, rye and oat milling industry at both EU and international levels. Members are the representative national associations from 28 European countries. In representing over 90% of the milling capacity in Europe, it is able to reflect credibly and authoritatively the interests of the industry.	23 (excluding HU, MT, RO, SK) EE, LV and LT represented by Baltic Millers Association	3 (ES, FI, SI), of which 2 (FI, SI) are affiliated to FoodDrinkEurope
UECBV	European Livestock and Meat Trading Union	UECBV is the EU voice of national federations representing livestock markets, livestock traders, meat traders and the meat industry. It unites 53 national or regional federations in 24 Member States and Japan, Norway, Russia, Switzerland and Ukraine. In total, some 20,000 firms of all sizes and over 230,000 jobs are represented through the UECBV.	23 (excluding EE, LT, LV, SK)	3 (ES, FI, NL), of which 2 (FI, NL) are affiliated to FoodDrinkEurope
AVEC	Association of Poultry Processors and Poultry Trade in the EU Countries	AVEC is the voice of the European poultry meat sector. It facilitates communication and exchange between international organisations and decision-makers, and focuses on key areas such as animal health and welfare, food safety and quality, trade and sustainable development. It has members from 17 Member States.	16 (AT, BE, DE, DK, ES, FI, FR, HU, IT, LV, NL, PL, PT, RO, SI, SE)	2 (FI, NL), of which 1 (FI) is affiliated to FoodDrinkEurope

Representativeness of the European social partner organisations: Food and drink sector

Other EU employer organisation			Member States with an affiliate according to the organisation's website	Member States with a food and drink sector affiliate
Abbreviation	Full name	Assessment of sector-relatedness		
CEBP	European Confederation of National Bakery and Confectionery Organisations	CEBP is a confederation of the national bakery and confectionery associations in the EU Member States. CEBP represents more than 190,000 SMEs with more than 2 million employees in 17 countries, concentrating on the strengthening and promotion of SMEs in Europe.	14 (AT, BE, DE, DK, EL, ES, FI, FR, HU, IT, LU, NL, RO, SE)	2 (AT, DE), neither of which is affiliated to FoodDrinkEurope
CEEV	European Committee of Wine Companies	Not relevant	No data	2 (ES, NL), neither of which is affiliated to FoodDrinkEurope
ECFF	European Chilled Food Federation	Not relevant	No data	2 (FI, NL), of which 1 (FI) is affiliated to FoodDrinkEurope
EFPPA	European Fat Processors and Renderers Association	Not relevant	No data	2 (AT, PT), of which 1 (AT) is affiliated to FoodDrinkEurope
Euromalt	Working Committee of the EU Malting Industry	Not relevant	No data	2 (AT, FI), both of which are affiliated to FoodDrinkEurope
AEDIL	Association of European Dairy Industry Learning	Not relevant	No data	1 (FI), which is affiliated to FoodDrinkEurope
AIBI	International Baking Association	Not relevant	No data	1 (SI), which is affiliated to FoodDrinkEurope
AIM	European Brands Association	Not relevant	No data	1 (FI), which is affiliated to FoodDrinkEurope
AIPCE	European Fish Processors Association	Not relevant	No data	1 (PT), which is not affiliated to FoodDrinkEurope
Assifonte	Association of the Processed Cheese Industry in the EU	Not relevant	No data	1 (AT), which is affiliated to FoodDrinkEurope
CEEP	European Centre of Employers and Enterprises Providing Public Services	Not relevant	No data	1 (MT), which is not affiliated to FoodDrinkEurope
Copa-Cogeca	Copa-Cogeca	Not relevant	No data	3 (HR, IT, SI), of which 1 (HR) is affiliated to FoodDrinkEurope
Culinaria Europe	Federation of Associations and Enterprises of Industrial Culinary Product Producers in Europe	Not relevant	No data	1 (AT), which is affiliated to FoodDrinkEurope
EBA	European Biogas Association	Not relevant	No data	1 (SI), which is affiliated to FoodDrinkEurope

Representativeness of the European social partner organisations: Food and drink sector

Other EU employer organisation			Member States with an affiliate according to the organisation's website	Member States with a food and drink sector affiliate
Abbreviation	Full name	Assessment of sector-relatedness		
Eucolait	Eucolait	Not relevant	No data	1 (NL), which is not affiliated to FoodDrinkEurope
ECSLA	European Cold Storage and Logistics Association	Not relevant	No data	1 (AT), which is affiliated to FoodDrinkEurope
EESC 'Various Activities' Group (Group III, 'Diversity Europe')	EESC 'Various Activities' Group (Group III, 'Diversity Europe')	Not relevant	No data	1 (EL), which is not affiliated to FoodDrinkEurope
EFM	European Milk Forum	Not relevant	No data	1 (NL), which is not affiliated to FoodDrinkEurope
ESC	European Shippers' Council	Not relevant	No data	1 (AT), which is affiliated to FoodDrinkEurope
European SME Assembly	European SME Assembly	Not relevant	No data	1 (EL), which is not affiliated to FoodDrinkEurope
Fediol	EU Vegetable Oil and Protein Meal Industry	Not relevant	No data	1 (FI), which is affiliated to FoodDrinkEurope
Fedolive	Federation of the Olive Oil Industry of the EEC	Not relevant	No data	1 (PT), which is not affiliated to FoodDrinkEurope
FEFAC	European Feed Manufacturers' Federation	Not relevant	No data	1 (AT), which is affiliated to FoodDrinkEurope
FSE	Food Supplements Europe	Not relevant	No data	1 (SI), which is affiliated to FoodDrinkEurope
GSSI	Global Sustainable Seafood Initiative	Not relevant	No data	1 (ES), which is not affiliated to FoodDrinkEurope
IDF	International Dairy Federation	Not relevant	No data	1 (FI), which is affiliated to FoodDrinkEurope
IMACE	International Margarine Association of the Countries of Europe	Not relevant	No data	1 (AT), which is affiliated to FoodDrinkEurope
LDAC	Long Distance Fleet Advisory Council	Not relevant	No data	1 (ES), which is not affiliated to FoodDrinkEurope
MAC	Market Advisory Council	Not relevant	No data	1 (ES), which is not affiliated to FoodDrinkEurope
OEIT	TomatoEurope Processors Association	Not relevant	No data	1 (ES), which is not affiliated to FoodDrinkEurope
OMC	Oat Millers Committee	Not relevant	No data	1 (FI), which is affiliated to FoodDrinkEurope

Other EU employer organisation			Member States with an affiliate according to the organisation's website	Member States with a food and drink sector affiliate
Abbreviation	Full name	Assessment of sector-relatedness		
SGF	Sure-Global-Fair	Not relevant	No data	1 (FI), which is affiliated to FoodDrinkEurope
SMEunited	SMEunited (formerly UEAPME)	Not relevant	No data	1 (EL), which is not affiliated to FoodDrinkEurope
Starch Europe	Starch Europe	Not relevant	No data	1 (FI), which is affiliated to FoodDrinkEurope
UIBC	International Union of Bakers and Confectioners	Not relevant	No data	1 (DE), which is not affiliated to FoodDrinkEurope
WAPA	World Apple and Pear Association	Not relevant	No data	1 (SI), which is affiliated to FoodDrinkEurope
BusinessEurope	BusinessEurope	Cross-industry social partner organisation		3 (EL, HR, SE), of which 2 (HR, SE) are affiliated to FoodDrinkEurope

Source: Network of Eurofound Correspondents' contributions to this study, 2020

Table 43: Other EU associations affiliated to FoodDrinkEurope with food and drink sector national employer organisations/business associations as members

Other EU employer organisation			Member States with an affiliate according to the organisation's website	Member States with a food and drink sector affiliate
Abbreviation	Full name	Assessment of sector-relatedness		
EDA	European Dairy Association	The EDA unites all types of dairy companies, cooperatives and privately owned dairies, world dairy leaders and SMEs in the milk processing industry. It has 31 national delegates from 22 countries.	19 (AT, BE, CZ, DE, DK, EE, EL, ES, FI, FR, IE, IT, LU, NL, PL, PT, SE, SI, SK)	6 (BG, ES, FI, NL, PT, SI), of which 2 (FI, SI) are affiliated to FoodDrinkEurope
BoEU	Brewers of Europe	The organisation promotes the beer industry in Europe, with members from a total of 29 countries and representing more than 11,000 breweries in Europe.	25 (excluding EE, LV)	5 (AT, BG, FR, SI, SK), of which 2 (AT, SI) are affiliated to FoodDrinkEurope
Caobisco	Association of Chocolate, Biscuit and Confectionery Industries of Europe	Caobisco stands for flexible and responsible marketing opportunities and the development of an innovative, sustainable, competitive and creative chocolate, biscuit and confectionery industry in Europe. With 15 national member associations and direct member companies and affiliated members, Caobisco is the voice of more than 12,700 companies in the sector.	12 (AT, BE, DE, ES, FI, FR, HU, IE, IT, NL, PL as national associations and EL as an affiliated member)	4 (AT, DE, ES, FI), of which 2 (AT, FI) are affiliated to FoodDrinkEurope

Representativeness of the European social partner organisations: Food and drink sector

Other EU employer organisation			Member States with an affiliate according to the organisation's website	Member States with a food and drink sector affiliate
Abbreviation	Full name	Assessment of sector-relatedness		
Clitravi	Liaison Centre for the Meat Processing Industry in the European Union	Clitravi is a professional organisation with the aim of representing the interests of the European meat processing industry. It is in a dialogue with relevant EU institutions and a member of FoodDrinkEurope. It has 26 national member organisations.	20 (excluding CY, EE, LU, LV, MT, SI, SK)	4 (AT, ES, FI, NL), of which 2 (AT, FI) are affiliated to FoodDrinkEurope
Profel	European Association of Fruit and Vegetable Processors	Profel promotes the interests and facilitates cooperation between more than 500 companies active in the fruit and vegetable processing industry, which employ more than 80,000 employees in 11 countries.	10 (AT, BE, DE, EL, ES, FI, FR, HU, IT, NL)	4 (AT, ES, FI, NL), of which 2 (AT, FI) are affiliated to FoodDrinkEurope
SNE	Specialised Nutrition Europe	SNE members are the national associations from 19 European countries whose members are companies producing tailor-made dietary solutions for populations with very specific nutritional needs.	17 (AT, BE, DE, DK, EL, ES, FI, FR, HR, HU, IE, IT, NL, PL, PT, RO, SE)	4 (AT, FI, HR, PL), all of which are affiliated to FoodDrinkEurope
UNESDA	Soft Drink Europe	UNESDA promotes the interests of consumers and producers of non-alcoholic beverages across Europe and aims for increased competitiveness and sustainability.	20 (excluding CY, HR, HU, LT, LV, MT, PL)	4 (AT, ES, PL, SI), of which 3 (AT, PL, SI) are affiliated to FoodDrinkEurope
NMWE	Natural Mineral Waters Europe (before 2021: EFBW, European Federation of Bottled Waters)	NMWE, established in 2003, is a non-profit trade association addressing all issues impacting the industry, raising them before both EU institutions and international organisations. It represents more than 500 companies in Europe through 24 trade associations, 7 direct company members and 7 affiliate members.	19 (excluding CY, EE, FI, LT, LV, MT, SE, SK)	3 (ES, PT, SI), of which 1 (SI) is affiliated to FoodDrinkEurope
CEFS	European Association of Sugar Manufacturers	Not relevant	No data	2 (DE, SK), neither of which is affiliated to FoodDrinkEurope
ECF	European Coffee Federation	Not relevant	No data	2 (AT, FI), both of which are affiliated to FoodDrinkEurope
ESA	European Spice Association	Not relevant	No data	2 (AT, FI), both of which are affiliated to FoodDrinkEurope
Fedima	Federation of European Manufacturers and Suppliers of Ingredients to the Bakery,	Not relevant	No data	2 (AT, PT), of which 1 (AT) is affiliated to FoodDrinkEurope

Representativeness of the European social partner organisations: Food and drink sector

Other EU employer organisation			Member States with an affiliate according to the organisation's website	Member States with a food and drink sector affiliate
Abbreviation	Full name	Assessment of sector-relatedness		
	Confectionery and Patisseries Industries			
AIJN	European Fruit Juice Association	Not relevant	No data	1 (FI), which is affiliated to FoodDrinkEurope
Ceereal	European Breakfast Cereal Association	Not relevant	No data	1 (FI), which is affiliated to FoodDrinkEurope
EuroGlaces	European Ice Cream Association	Not relevant	No data	1 (DE), which is not affiliated to FoodDrinkEurope
spiritsEUROPE	spiritsEUROPE	Not relevant	No data	1 (AT), which is affiliated to FoodDrinkEurope
Starch Europe	Starch Europe	Not relevant	No data	1 (FI), which is affiliated to FoodDrinkEurope

Note: Table 39 provides other information on these companies.

Source: Network of Eurofound Correspondents' contributions to this study, 2020

3.7. Summary for Member States with the largest sectoral workforce

This section describes the membership of the ESSDC-represented organisations in the six Member States with the largest food and drink sector workforces in absolute numbers. This is followed by a description of the membership in the Member States with the largest food and drink sector workforce as a proportion of the total employment in the country (between 2.9% and 4.0%). Table and Table 45 show that, in the countries with the most significant employment levels, both employees and employers are represented in the ESSDC by at least one organisation in each country. In each country, at least one trade union involved in collective bargaining is represented in the ESSDC. On the other hand, employer organisations involved in collective bargaining are present in only two countries.

Table 44: Affiliations in Member States with sectoral employment in excess of 200,000

MS	Total number of people employed (2019)	At least one national TU represented in the ESSDC	At least one national TU involved in collective bargaining represented in the ESSDC	At least one national EO represented in the ESSDC	At least one national EO involved in collective bargaining represented in the ESSDC
DE	862,600				*
FR	679,100				*
ES	520,600				*
PL	513,800				
IT	504,100				
RO	221,800				

Notes: Coloured shading denotes a positive response. *The affiliated organisation is an umbrella organisation not involved in collective bargaining but whose members are involved in collective bargaining. EO, employer organisation; TU, trade union.

Sources: Eurostat, Labour Force Survey, 2019; Network of Eurofound Correspondents' contributions to this study, 2020

Next, a closer look at countries with the highest sectoral employment levels in which there are no employer organisations involved in collective bargaining (Table 45) is taken. In France, Germany and Spain, there are several employer organisations per country, but only one per country is represented in the ESSDC. All of these are umbrella organisations that themselves are not active in collective bargaining; rather, their members are involved in such bargaining. In Poland, there is only one relevant employer organisation.

Table 45: Affiliations in the Member States where the food and drink sector has the largest share of total employment

MS	Share of total employment (2019) (%)	At least one national TU represented in the ESSDC	At least one national TU involved in collective bargaining represented in the ESSDC	At least one national EO represented in the ESSDC	At least one national EO involved in collective bargaining represented in the ESSDC
HR	4.0				
EL	3.4				
BG	3.3				
HU	3.2				
PL	3.1				
LT	2.9				

Note: Coloured shading denotes a positive response. EO, employer organisation; TU, trade union.

Sources: Eurostat, Labour Force Survey, 2019; Network of Eurofound Correspondents' contributions to this study, 2020

In some countries in which food and drink sector employment represents the largest share (compared with other sectors) of the total employment in the country, there are no employer organisations involved in collective bargaining (see Table 45). In Hungary and Poland, the organisation represented in the ESSDC is the only employer organisation present in each country. The employer organisation represented in the ESSDC from Bulgaria is the only one out of six employer organisations in the country that is not involved in collective bargaining.

3.8. European social partner organisations' capacity to negotiate

EFFAT was established in its current form in December 2000. However, cooperation structures between food and drink sector trade unions date back to 1958 (Fattmann, 2008). According to the EFFAT statutes of 7 November 2019, one of its tasks is to 'promote social dialogue at all levels and collective bargaining at national and sectoral level' (Article 3). The European role of EFFAT is, among other things, 'negotiating/bargaining on behalf of its member organisations in the social dialogue and in transnational negotiations with companies'. Article 17Q of the EFFAT statutes clearly defines the duties of the EFFAT Executive Committee in the case of negotiations, in terms of the composition and mandate of a negotiation delegation, how the committee is to be kept informed and how it decides on draft texts and agreements. Therefore, EFFAT's statutes set out a clear role of negotiation. The procedures for this were set out in a separate document as referred to in Article 17Q.

EFFAT has 14 staff members, of which three are regularly involved in the food and drink ESSDC. EFFAT has a website with a subsection on food and a members-only section, which is mainly used to coordinate the work of European Works Councils. Within EFFAT, there is a specific Food, Drink and Tobacco Sector. This sector has a board and an annual general assembly, at which an action plan for work in the year ahead is created. The EFFAT Executive Committee is the main decision-making body contributing to the texts and agreements of the food and drink ESSDC.

FoodDrinkEurope is the successor of the CIAA, which was founded in 1982 and renamed FoodDrinkEurope in June 2011. In the latest version of its statutes, from 2015, the activities of the ESSDC could fall within what is set out in Article 4.2I–L, although social dialogue with trade union organisations is not explicitly mentioned.

FoodDrinkEurope has 23 staff members, of which two are regularly involved in food and drink ESSDC activities. It has a website and an extranet for communicating with its members. These contain publications related to EU activities, including those of European agencies such as the European Food Safety Authority, and the positions and documents that FoodDrinkEurope agrees within its membership on market and competitive issues. Within FoodDrinkEurope, there is a social dialogue working group for internal discussions related to the ESSDC. In addition, the competitiveness working group and the research and development working group sometimes deal with transversal issues that are also relevant for the ESSDC, such as skills-related matters, the impact of COVID-19 and the EU Farm to Fork Strategy.

FoodDrinkEurope states that it has the capacity to negotiate on behalf of its members, following a standard mandating procedure and formalised procedures for mandating and decision-making on draft social partner texts or agreements. These are generally embedded in the voting rights of the member organisations set out in Article 8 of the FoodDrinkEurope statutes, although there are no specified procedures for agreeing European social partner texts or agreements. Positions are rarely voted upon, as FoodDrinkEurope is a consensus-based organisation. Draft documents are normally discussed by the FoodDrinkEurope social dialogue working group. A decision is made by consensus of all members of the working group and with the approval of the director-general of FoodDrinkEurope, who can sign the text on behalf of the organisation. The April 2020 guidelines for the safety of workers in the sector during the COVID-19 pandemic, given this was an urgent issue, were discussed only with the chairperson of the FoodDrinkEurope social dialogue committee, and subsequently shared with the committee members for comments. Only when agreement cannot be reached by the FoodDrinkEurope social dialogue committee would a matter be brought to the executive board of the organisation. This has not yet been necessary.

EFFAT and FoodDrinkEurope have cooperated regularly since 2011, in the ESSDC and in three EU-funded projects. A fourth joint project has started in 2022.

3.9. Effective participation in the ESSDC

There were three plenary meetings of the food and drink ESSDC in 2018 (in January, June and November) and two in 2019 (in February and June). Except for the June 2018 meeting, at which there were only eight delegates representing trade unions, the number of trade union delegates varied between 13 and 16 (from seven to nine different Member States) for these meetings. The number of delegates representing employer organisations varied from two to six (from two to four different Member States).

Looking at countries from which there was effective participation in the ESSDC for the sector in 2018 and 2019 (Table 46), the trade union side had participants from 12 Member States, and the employer delegation had participants from four Member States.

Table 46: Effective participation in the ESSDC for the food and drink sector, 2018–2019

12 Member States with trade union participation in the ESSDC for the food and drink sector	BE, BG, DE, DK, ES, FI, FR, IE, IT, MT, RO, SE
14 Member States for which EFFAT has affiliated sectoral trade unions but that did not participate in the ESSDC	AT, CY, EL, HR, HU, LT, LU, LV, NL, PL, PT, RO, SI, SK
4 Member States with employer organisation participation in the ESSDC for the food and drink sector	BE, DE, DK, HR
19 Member States for which FoodDrinkEurope has affiliated sectoral employer organisations but that did not participate in the ESSDC	AT, BG, CZ, EE, EL, ES, FI, FR, HU, IE, IT, LU, NL, PL, PT, RO, SE, SI, SK

Note: For this analysis, three meetings in 2018 (in January, June and November) and two meetings in 2019 (in February and June) were considered.

Source: Eurofound and the European Commission, 2018/2019

This means that EFFAT has affiliated trade unions in the food and drink sector in 14 Member States that did not participate in ESSDC meetings in 2018 or 2019: Austria, Croatia, Cyprus, Greece, Hungary, Latvia, Lithuania, Luxembourg, the Netherlands, Poland, Portugal, Romania, Slovakia and Slovenia.

On the side of the European employer organisations, 19 Member States had no employer representative in any of the 2018 or 2019 meetings of the ESSDC, even though there are FoodDrinkEurope-affiliated organisations in these Member States. These Member States are Austria, Bulgaria, Czechia, Estonia, Finland, France, Greece, Hungary, Ireland, Italy, Luxembourg, the Netherlands, Poland, Portugal, Romania, Slovakia, Slovenia, Spain and Sweden.

Conclusions

There are 4.7 million employees in the food and drink sector in the EU27, constituting 2.4% of the total EU workforce. Two-thirds of the EU food and drink workforce are employed in five EU Member States: Germany (18%), France (14%), Italy, Poland and Spain (each 11%). In Croatia, 4% of the total national workforce is employed in the food and drink sector, which is the highest proportion in the EU27. In Bulgaria, Greece, Hungary and Poland, this proportion is between 3% and 4%. For all other countries, the food and drink sector accounts for less than 3% of the national workforce. The lowest proportions can be found in Sweden (1%) and Luxembourg (0.9%).

Within the food and drink sector, the workforce breakdown indicates that 90% of the total sectoral workforce is employed in food production and only 10% in drink production. Manufacture of bakery products and meat processing together account for 54% of the sectoral workforce. Included in this are both small village bakeries with only two or three employees and much larger companies. The average number of employees in bakery companies is nine, illustrating that microfirms prevail in this part of the sector. The average number of employees in meat production, including both small butchers and larger slaughterhouses and meat factories, is 23. In the drink subsector, the activities with the most employees are the manufacture of wine, of soft drinks and of beer.

Across the food and drink sector, 80% of companies are microfirms with fewer than 10 employees, and 10% have between 10 and 19 employees. Only 1% of the companies in the sector have more than 250 employees. In terms of workforce, 42% of employees work in a company with more than 250 employees, and 23% in companies with between 50 and 249 employees. Together, this is two-thirds of the sectoral workforce. Only 15% of workers in the sector are employed in microfirms, and another 9% work in companies with 10–19 employees. These two smaller company size groups together employ about one-quarter of the sectoral workforce. Chapter 1 examined further specificities of the sector and how it was impacted by the COVID-19 crisis.

Chapter 2 identified 90 national sectoral trade unions (and two trade unions not involved in sectoral collective bargaining and not affiliated to EFFAT, which were not included in the study) and 112 employer organisations and business associations (and 62 sectoral trade associations, which were also not included in the assessment of representativeness). Among the national trade unions, 74% organise workers in both food and drink production. A small majority of them have a wide membership domain, covering most of the activities in the sector. Of all sectoral trade unions, 39% cover all food and drink production activities. This is the case for 20% of the employer organisations. These are umbrella federations to which smaller subsectoral associations are affiliated. Only one-third of the sectoral employer organisations organise companies in both food and drink production, while two-thirds of them cover a very specific part of the sector, with only a few covering all sectoral activities. This higher degree of sectionalism and fragmentation explains the relatively higher number of employer organisations and trade associations in the sector at national level (see Section 2.7).

Of the 90 sectoral trade unions, 89 are involved in collective bargaining. Two-thirds of them are involved in multi-employer collective bargaining at sector level or in a combination of multi-employer bargaining and single-employer bargaining. The remaining one-third of trade unions are engaged in only company-level (single-employer) bargaining. The majority of employer organisations are involved in only sector-level collective bargaining, although 21% are engaged in both sector- and company-level

collective bargaining. Some 4% are involved in only company-level collective bargaining and 11% are not involved in collective bargaining.

Among the EU Member States with the largest sectoral workforces, France, Italy and Spain have very high collective bargaining coverage, of between 95% and 100%. This is above 50% for Germany and below 24% for Poland (see Table 27). Sectoral social dialogue structures specific to food and drink were identified for 18 Member States: Austria, Belgium, Bulgaria, Croatia, Denmark, Finland, France, Germany, Hungary, Italy, Latvia, Malta, the Netherlands, Poland, Romania, Slovenia, Slovakia and Spain (see Table 29).

Of all the trade unions organising workers in food production activities, 54 trade unions (60%) from 25 Member States are affiliated to EFFAT. Only in Czechia and Estonia are there no food trade unions affiliated to EFFAT. Among the trade unions organising workers in drink production activities, 44 trade unions (65%) from 24 Member States are affiliated to EFFAT. Czechia, Estonia and Greece do not have any drink subsector trade unions affiliated to EFFAT. EFFAT has 53 affiliated trade unions that are involved in sectoral collective bargaining, in 25 Member States. Only in Czechia and Estonia does EFFAT have no members.

The largest national food and drink sector trade union is affiliated to EFFAT in 20 Member States, and the second largest is affiliated to EFFAT in 16 Member States. The Member States for which EFFAT has an affiliated trade union, although not the one with most members in the sector, are Cyprus (SEBETTYK-PEO), Greece (POEUGTP), Hungary (ÉDSZ), Latvia (LLPNA) and Portugal (FESAHT). Altogether, 36 sectoral trade unions identified in this study are not represented by EFFAT (Table 36).

A number of other European associations with affiliated food and drink sector trade unions were found (see Table 40). However, EFFAT is the only one with a statutory mandate to negotiate.

It can thus be concluded that EFFAT is the **only representative European trade union organisation for the food and drink sector**.

When assessing the representativeness of FoodDrinkEurope, it needs to be considered that 19% of all identified employer organisations involved in collective bargaining in this study are umbrella organisations, covering all or almost all activities, and that 34% cover both food and drink producers. In this study, the assessment of the representativeness of FoodDrinkEurope is based upon only these directly affiliated national umbrella organisations.

FoodDrinkEurope has 25 affiliated employer organisations covering food production (27%) in 23 Member States and 22 such organisations covering drink production (45%) in 22 Member States (see Table 19). For Cyprus, Latvia, Lithuania and Malta, FoodDrinkEurope has no member organisation representing employers in food production. For the drink subsector, there is no affiliated employer organisation for Croatia, Cyprus, Latvia, Lithuania or Malta. FoodDrinkEurope has 13 affiliated employer organisations that are involved in sectoral collective bargaining, in 12 Member States: Austria, Belgium, Croatia, Denmark, Finland, Greece, Ireland, Italy, the Netherlands, Romania, Slovenia and Sweden.

As stated above, the assessment of representativeness is based upon the affiliated national umbrella organisations from 23 EU Member States. However, FoodDrinkEurope also has affiliated European subsectoral associations and directly affiliated multinational companies. These companies are also part of the membership of the affiliated national associations, while the European subsectoral associations have members in each country that are also part of the national umbrella organisations

affiliated to FoodDrinkEurope. FoodDrinkEurope represents all its members equally – both SMEs and large companies – regardless of size, in all segments of the sector. FoodDrinkEurope has the largest sectoral employer organisation as an affiliate in 21 Member States and the second largest in 2 Member States. The Member States where the largest employer organisation is not affiliated are Austria, Greece and Malta. For Cyprus, Latvia and Lithuania, no sectoral employer organisation was identified. The largest European food and drink multinational companies are also directly affiliated to FoodDrinkEurope. Altogether, 82 national employer organisations not affiliated to FoodDrinkEurope and, as such, not represented in the ESSDC were identified (see Table 37). In addition, FoodDrinkEurope has the proven capacity to negotiate. It can thus be concluded that FoodDrinkEurope is the **most representative European employer organisation for the food and drink sector**.

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Annex 1: National trade unions and employer organisations included in this study

Table 47: Trade unions included in this study

MS	Abbreviation in original language	Full name in original language	Full name in English
AT	PRO-GE	Produktionsgewerkschaft	Manufacturing Union
	GPA-DJP	Gewerkschaft der Privatangestellten, Druck, Journalismus, Papier	Union of Salaried Private Sector Employees, Graphical Workers and Journalists
BE	ACVLB-CGSLB	Algemene Centrale der Liberale Vakbonden van België – Centrale Générale des Syndicats Libéraux de Belgique	General Federation of Liberal Trade Unions of Belgium
	ACV Voeding en Diensten	ACV Voeding en Diensten	General Christian Trade Union Food and Services
	ABVV-FGTB Horval	Algemeen Belgisch Vakverbond (ABVV), Fédération Générale du Travail de Belgique (FGTB) Horval	General Belgian Trade Union Horval
	ABVV-FGTB BBTK SETCa	(Algemeen Belgisch Vakverbond, Fédération Générale du Travail de Belgique) De Bond van Bedienden, Technici en Kaderleden (BBTK) Syndicat des Employés, Techniciens et Cadres (SETCa)	ABVV-FGTB Union of White-Collar Workers, Technicians and Professional and Managerial Staff
	ACV-CSC Puls	(Algemeen Christelijk Vakverbond (ACV), Confédération des syndicats chrétiens (CSC)) Puls	General Christian Trade Union Puls
	ACV-CSC CNE	(Algemeen Christelijk Vakverbond (ACV), Confédération des syndicats chrétiens (CSC)) Centrale nationale des employés	ACV-CSC National White Collar Federation
BG	FNSZ/ФНСЗ	Федерация на независимите синдикати от земеделието	Federation of Independent Trade Unions in Agriculture
	FSOHP/ФСОХП	Федерацията на независимите синдикални организации от хранителната промишленост	Federation of Independent Trade Unions in the Food Industry
	FHPP/ФХПП	Федерация 'Хранителна и питейна промишленост'	Federation Food and Beverages Industry
	SBHN/СБХН	Синдикат 'Бира, храни и напитки'	Trade Union of Beer, Food and Beverages
	NSFTKTU/НСФКТУ	Независима синдикална федерация на търговията, кооперациите, туризма и услугите	Independent Trade Union Federation of Commerce, Cooperatives, Tourism and Services
CY	SEBETTYK-PEO	Συντεχνία Εργατοϋπαλλήλων Βιομηχανίας, Εμπορίου, Τύπου-Τυπογραφείων και Γενικών Υπηρεσιών Κύπρου – ΠΕΟ	Cyprus Industry, Commerce and Press-Printing Houses and General Services Trade Union –PEO
	OBIK-SEK	Ομοσπονδία Βιομηχανικών Εργατοϋπαλλήλων Κύπρου – ΣΕΚ	Federation of Industrial Workers of Cyprus – SEK
	Segdamelin-PEO	Συντεχνία Εργατοϋπαλλήλων Γεωργίας, Δασών, Μεταφορών, Λιμενεργατών, Ναυτεργατών και Συναφών Επαγγελματιών Κύπρου – ΠΕΟ	Cyprus Agricultural, Forestry, Transport, Port, Seamen and Allied Occupations Trade Union – PEO
	OMEPEGE-SEK	Ομοσπονδία Εργατοϋπαλλήλων Μεταφορών, Πετρελαιοειδών και Γεωργίας Κύπρου – ΣΕΚ	Employees' Federation of Transport, Petroleum and Agriculture – SEK
CZ	NOS PPP	Nezávislý odborový svaz pracovníků potravinářského průmyslu a příbuzných odvětví Čech a Moravy	Independent Trade Union of Employees in the Food Industry and Related Sectors of Bohemia and Moravia

Representativeness of the European social partner organisations: Food and drink sector

MS	Abbreviation in original language	Full name in original language	Full name in English
DE	NGG	Gewerkschaft Nahrung-Genuss-Gaststätten	Trade Union of Food, Beverages, Drink, Tobacco, Hotel, Catering and Allied Workers
DK	NNF	Fødevareforbundet	Food Workers' Union
	3F	Fagligt Fælles Forbund	United Federation of Danish Workers
	HK Handel	HK Handel	HK Commerce
	CO-industri	CO-industri	Central Organisation of Industrial Employees in Denmark
EE	ETTAF	Eesti Tööstustöötajate Ametiühingute Föderatsioon	Estonian Industry Workers Trade Union
EL	POEUGTP	Πανελλήνια Ομοσπονδία Εργατοτεχνιτών και Υπαλλήλων Γάλακτος, Τροφίμων και Ποτών	Pan Hellenic Federation of Milk, Food and Drinks Workers and Employees
	POEK	Πανελλήνια Ομοσπονδία Εργατοϋπαλλήλων Κρέατος	Pan Hellenic Federation of Manual and Clerical Staff of the Meat Industry
	POEET	Πανελλήνια Ομοσπονδία Εργαζομένων στον Επισιτισμό- Τουρισμό	Pan Hellenic Federation of Employees in Food and Tourism
	OEXBE	Ομοσπονδία Εργατοϋπαλλήλων Χημικής Βιομηχανίας Ελλάδας	Federation of Chemical Industry Employees of Greece
ES	FI-CCOO	Federación Industria de Comisiones Obreras	Federation of Industry of Workers' Commissions
	UGT-FICA	Federación de Industria, Construcción y Agroalimentación de la Unión General de Trabajadores	Federation of Industry, Construction and Agrofood of the General Union of Workers
	ELA	ELA Euskal Sindikatua	ELA Basque Union
	CIG – FGAMT	CIG – Federación Galega de Alimentación, Mar, Transporte, Téxtil, Telecomunicacións e actividades afíns	CIG – Galician Federation of Food, Sea, Transport, Textiles, Telecommunications and Related Activities
	FI-USO	Federación de Industria de la Unión Sindical Obrera	Industry Federation of the Workers' Union
FI	SEL	Suomen Elintarviketyöläisten Liitto SEL	Finnish Food Workers Union
	MVL	Meijerialan Ammattilaiset MVL ry	Professional Dairy Association MVL
	PRO	Ammattiliitto Pro ry	Trade Union Pro
FR	FGA-CFDT	Fédération Générale Agroalimentaire CFDT	General Federation of the Agrofood Industry CFDT
	FGTA-FO	Fédération générale des Travailleurs de l'Agriculture, de l'Alimentation, des tabacs et des services annexes – Force Ouvrière	General Federation of Workers in Agriculture, Food, Tobacco and Related Services – Labour Force
	CFTC-CSFV	Fédération des Syndicats Commerce, Services et Force de Vente	Federation of Commerce, Services and Sales Force Trade Unions
	FNAF-CGT	Fédération nationale agroalimentaire et forestière – CGT	National Federation of the Forestry and Agrofood Industry
	CFE-CGC AGRO	Fédération nationale Agroalimentaire – CFE-CGC	National Federation of the Agrofood Industry
HR	PPDIV	Sindikat zaposlenih u poljoprivredi, prehrambenoj i duhanskoj industriji i vodoprivredi Hrvatske	Trade Union of Employees in the Agriculture, Food and Tobacco Industry and Water Resources
	NSR PHP	Nezavisni sindikat radnika u proizvodnji hrane i pića	Independent Trade Union of Workers in the Production of Food and Drink
	NSZP	Nezavisni sindikat 'Zagrebačke pivovare'	Independent Trade Union 'Zagrebačka pivovara'
HU	EMFSZ	Élelmészipari Munkavállalók Független Szakszervezete	Independent Trade Union of Food Workers
	HDSZ	Húsipari Dolgozók Szakszervezete	Trade Union of Meat Industry Workers

Representativeness of the European social partner organisations: Food and drink sector

MS	Abbreviation in original language	Full name in original language	Full name in English
	ÉDSZ	Élelmiszeripari Dolgozók Szakszervezete	Trade Union of Food Workers
	MEDOSZ	Mezőgazdasági, Erdészeti, Élelmiszeripari és Vízügyi Dolgozók Szakszervezete	Trade Union of Agriculture, Forestry, Food and Water Supply Workers
	GMDSZ	Gabona- és Malomipari Dolgozók Szakszervezete	Grain and Mill Workers' Union
IE	SIPTU	Services Industrial Professional Trade Union	Services Industrial Professional Trade Union
	GSU	Guinness Staff Union	Guinness Staff Union
	Connect TU	Connect Trade Union	Connect Trade Union
	DEA	Dairy Executives Association	Dairy Executives Association
IT	FAI-CISL	Federazione Agricola, Alimentare, Ambientale Industriale Italiana-CISL	Italian Industrial Federation of Agriculture, Food and Environment – CISL
	FLAI-CGIL	Federazione Lavoratori Agroindustria	Agri-industrial Workers Federation
	UILA-UIL	Unione Italiana dei Lavoratori Agroalimentari – UIL	Italian Union of Agri-Food Workers
	UGL Agroalimentare	Unione Generale del Lavoro Agroalimentare	General Union of Agri-food Labour
LT	LMP	Lietuvos maistininų profesinė sąjunga	Lithuanian Trade Union of Food Producers
	LZUDPSF	Lietuvos žemės ūkio darbuotojų profesinių sąjungų federacija	Trade Union Federation of Lithuanian Agricultural Workers
LU	LCGB	Confédération luxembourgeoise des syndicats chrétiens	Luxembourg Confederation of Christian Trade Unions
	OGB-L	Syndicat alimentation et hôtellerie de l'OGB-L	Independent Trade Union Confederation – Luxembourg
LV	LIA (also called LINA)	Latvijas Industriālo nozaru arodbiedrība	Latvian Industrial Workers Trade Union
	LLPNA	Latvijas Lauksaimniecības un pārtikas nozaru arodbiedrība	Latvian Agriculture and Food Branch Trade Union
MT	GWU	General Workers Union	General Workers Union
	UHM	Union Haddiema Magħqudin	Voice of the Workers
NL	FNV	Federatie Nederlandse Vakbeweging	Federation of Dutch Trade Unions
	CNV Vakmensen	Christelijk Nationaal Vakverbond – Vakmensen	National Christian Union – Trade Professionals
PL	SPS NSZZ	Sekretariat Przemysłu Spożywczego NSZZ Solidarność	Food Workers' Secretariat of NSZZ Solidarnosc
	FZZPM	Federacja Związków Zawodowych Pracowników Mleczarstwa	Trade Unions Federation of Dairy Workers
	FZZPC	Federacja Związków Zawodowych Pracowników Przemysłu Cukrowniczego	Trade Union Federation of Sugar Industry Workers
	FZZPPS	Federacja Związków Zawodowych Pracowników Przemysłu Spożywczego	Trade Union Federation of Food Industry Workers
PT	SETAAB	Sindicato Nacional dos Trabalhadores da Agricultura, Floresta, Pesca, Turismo, Indústria Alimentar, Bebidas e Afins	National Union of Workers in Agriculture, Forestry, Fishing, Tourism, Food Industry, Beverages and Related Activities
	FESAHT	Federação dos Sindicatos de Agricultura, Alimentação, Bebidas, Hotelaria e Turismo de Portugal	Federation of Agriculture, Food, Beverage, Hotel and Tourism Unions of Portugal
	CESP	Sindicato dos Trabalhadores do Comércio, Escritórios e Serviços de Portugal	Union of Workers in Commerce, Administration and Services of Portugal

MS	Abbreviation in original language	Full name in original language	Full name in English
	Sindepescas	Sindicato Democrático das Pescas	Democratic Fisheries Union
	Sitese	Sindicato dos Trabalhadores e Técnicos de Serviços, Comércio, Restauração e Turismo	Union of Workers and Service Technicians, Trade, Restoration and Tourism
	Sinticaba	Sindicato Nacional dos Trabalhadores da Indústria e Comércio de Alimentação, Bebidas e Afins	National Trade Union of Workers in the Food, Beverage and Related Industries and Commerce
	Union of Professionals in Dairy, Food, Agriculture, Offices, Trade, Services, Road Transport, Metalworking, Construction and Woodworking	Sindicato dos Profissionais de Lacticínios, Alimentação, Agricultura, Escritórios, Comércio, Serviços, Transportes Rodoviários, metalomecânica, Metalurgia, Construção Civil e Madeiras	Union of Professionals in Dairy, Food, Agriculture, Offices, Trade, Services, Road Transport, Metalworking, Construction and Woodworking
	Union of Workers in Manufacturing and Commerce of Meat of the South	Sindicato dos Trabalhadores da Indústria e Comércio de Carnes do Sul	Union of Workers in Manufacturing and Commerce of Meat of the South
RO	CERES	Centrala Sindicatelor Lucratorilor din Agricultura si Alimentatie	National Trade Union Federation
	Sindalimenta	Federația Națională a Sindicatelor din Industria Alimentară, a Băuturilor, Tutunului și Ramuri Conexe 'Sindalimenta'	National Trade Union Federation Sindalimenta
SE	HRF	Hotell- och Restaurangfacket	Swedish Hotel and Restaurant Workers' Union
	Handels	Handelsanställdas förbund	Union of Commercial Employees
	Livs	Livsmedelsarbetareförbundet	Swedish Food Workers' Union
	Unionen	Unionen	Unionen
	Sveriges Ingenjörer	Sveriges Ingenjörer	Swedish Association of Graduate Engineers
	Ledarna	Ledarna	Ledarna
SI	S KŽI	Sindikat kmetijstva in živilske industrije Slovenije	Trade Union of Agriculture and the Food Industry of Slovenia
SK	OZP SR	Odborový zväz potravinárov Slovenskej republiky	Trade Union Association of the Food Industry in Slovakia
	OZPP SR	Odborový zväz pracovníkov poľnohospodárstva na Slovensku	Trade Union Association of Agriculture Workers in Slovakia

Source: Network of Eurofound Correspondents' contributions to this study, 2020

Table 48: Employer organisations included in this study

MS	Abbreviation in original language	Full name in original language	Full name in English
AT	FVNG (also called FIAA)	Fachverband für Nahrungs- und Genussmittelindustrie	Food Industry Association Austria
	BILG	Bundesinnung für Lebensmittelgewerbe	Federal Association of Food Trades
BE	FEVIA	Fédération de l'Industrie Alimentaire/Federatie Voedingsindustrie	Food Industry Federation
	FGBB	Federatie Van Grote Bakkerijen in België	Federation of Large Bakeries in Belgium

Representativeness of the European social partner organisations: Food and drink sector

MS	Abbreviation in original language	Full name in original language	Full name in English
BG	SHNB/CXHB	Сдружение 'Храни и напитки България'	Food Drink Bulgaria Association
	SPZZP/СПЗЗП	Съюз на производителите на захар и захарни продукти	Union of Sugar and Sugar Products Producers
	SPKF/СПКФ	Съюз на производителите на комбинирани фуражи	Bulgarian Feed Manufacturers Association
	AMB/АМБ	Асоциация на Млекопреработвателите в България	Bulgarian Association of Dairy Processors
	SPB/СПБ	съюз на пивоварите в България	Union of Brewers in Bulgaria
	NBPS/НБПС	национален браншови пчеларски съюз	National Branch Beekeeping Union
CZ	PK ČR	Potravinářská komora České republiky	Federation of the Food and Drink Industries of the Czech Republic
DE	Lebensmittelverband Deutschland	Lebensmittelverband Deutschland	Food Federation Germany
	BDSI	Bundesverband der Deutschen Süßwarenindustrie	Federation of the German Confectionery Industry
	VdZ	Verein der Zuckerindustrie	Sugar Industry Association
	Verband deutscher Großbäckereien	Verband deutscher Großbäckereien	Federal Association of German Industrial Bakeries
	Zentralverband des Deutschen Bäckerhandwerks	Zentralverband des Deutschen Bäckerhandwerks	German Bakers' Confederation
DK	DI	Dansk Industri	Confederation of Danish Industry
EE	ETL	Eesti Toiduainetööstuse Liit	Association of Estonian Food Industry
EL	SEV	Σύνδεσμος Επιχειρήσεων και Βιομηχανιών	Hellenic Federation of Enterprises
	SEVT	Σύνδεσμος Ελληνικών Βιομηχανιών Τροφίμων	Federation of Hellenic Food Industries
	GSEVEE	Γενική Συνομοσπονδία Επαγγελματιών Βιοτεχνών Εμπόρων Ελλάδας	Hellenic Confederation of Professionals, Craftsmen and Merchants
ES	FIAB	Federacion Española de Industrias de Alimentacion y Bebidas	Spanish Food and Drinks Industry Federation
	ANICE	Asociación Nacional de Industrias de la Carne de España	National Association of Meat Industries of Spain
	Fenaval	La Federación Nacional de Asociaciones de Transformatos Vegetales y Alimentos Procesados	National Federation for Transformed Vegetables and Processed Foods Associations
	AFHSE	Asociación de Fabricantes de Harinas y Sémolas de España	Spanish Flour Millers Association
	Conxemar	Conxemar: Asociación Española de Mayoristas, Importadores, Transformadores y Exportadores de productos de la pesca y acuicultura	Spanish Association of Wholesalers, Importers, Processors and Exporters of Fish Products and Aquaculture
	CESFAC	Confederación Española de Fabricantes de Piensos Compuestos para Animales	Spanish Confederation of Manufacturers of

Representativeness of the European social partner organisations: Food and drink sector

MS	Abbreviation in original language	Full name in original language	Full name in English
ES			Compound Feed for Animals
	Produlce	Asociación Espanyola del Dulce	Spanish Confectionery, Cocoa and Chocolate and Fine Bakery Wares Association
	FENIL	Federación Nacional de Industrias Lácteas	Spanish Dairy Industries Federation
	ANEABE	Asociación Nacional De Empresas De Aguas De Bebida Envasadas	Spanish National Association of Bottled Water
	FEV	Federación Española del Vino	Spanish Wine Federation
	Anfabra	Asociación de Bebidas Refrescantes	Soft Drinks Association
FI	ETL	Elintarviketeollisuusliitto ry	Finnish Food and Drink Industries' Federation
FR	ANIA	Association Nationale des Industries Alimentaires	National Association of the Food Industry
	Alliance 7	Alliance 7	Alliance 7
	FNIL	Fédération Nationale de l'Industrie Laitière	National Dairy Industry Federation
	Culture Viande	Culture Viande	Beef Culture
	FEDEV (formerly FNICGV)	Fédération des métiers de la viande	Federation of Meat Trades
	FICT	Fédération française des industriels charcutiers, traiteurs, transformateurs de viandes	French Federation of Butchers, Caterers, Meat Processors and Delicatessen Manufacturers
	ANMF	Association nationale de la meunerie française	National Association of French Milling
	BRF (formerly SNRB)	Boissons Rafrâchissantes de France	Soft Drinks of France
	ABF	Association des Brasseurs de France	Brewers of France
	FEDALIM	FEDALIM - Pole de regroupement de fereations ou syndicat professionnel industrie alimentaire	Cluster of federations or trade unions in the food industry
	CSEM	Maison des eaux minérales naturelles (formerly Chambre syndicale des eaux minérales)	House of Natural Mineral Waters
	SNSF	Syndicat national des fabricants de sucre	National Sugar Manufacturers Union
	SNIPO	Syndicat national des industriels et professionnels des œufs	National Union of Egg Industrialists and Professionals
	Adepale	Association des entreprises de produits alimentaires élaborés	Association of Processed Food Companies
	CVNVS	Conseil national des Industries et Commerces en gros des Vins, Cidres, Spiritueux, Sirops, Jus de fruits et Boissons diverses	National Council of Industries and Wholesalers of Wines, Ciders, Spirits, Syrups, Fruit Juices and Miscellaneous Beverages
HR	HUP UPIIP	Hrvatska udruga poslodavaca Udruga prehrambene industrije i poljoprivrede	Croatian Employers' Association – Food Industry and Agriculture Association

Representativeness of the European social partner organisations: Food and drink sector

MS	Abbreviation in original language	Full name in original language	Full name in English
HU	FÉSZ (formerly ÉFOSZ)	Felelős Élelmiszergyártók Szövetsége (formerly Élelmiszer-feldolgozók Országos Szövetsége)	Federation of Hungarian Food Industries
IE	IBEC	Irish Business and Employers Confederation	Irish Business and Employers Confederation
IT	Federalimentare	Federazione Italiana dell'Industrial Alimentare	Italian Federation of Food Industry
	Confartigianato Alimentazione	Confartigianato Alimentazione	Confartigianato Alimentazione
	CNA Alimentare	Confederazione nazionale dell'artigianato e della piccola e media impresa alimentare	National Confederation of Craft Trades and Small and Medium-Sized Enterprises of the Food and Drink Sector
	Casartigiani	Confederazione Autonoma Sindacati Artigiani	Autonomous Confederation of Artisan Unions
	CLAAI	Confederazione delle Libere Associazioni Artigiane Italiane	Confederation of Free Italian Artisan Associations
	Legacoop Agroalimentare	Associazione Nazionale delle Cooperative Agroalimentari per lo Sviluppo Rurale	National Association of Agrofood Cooperatives for Rural Development
	Agrital – AGCI	Associazione Generale Cooperative Italiane – Settore Agri Ittico Alimentare	General Association of Italian Cooperatives – Agriculture, Fisheries and Food
	Fedagri-Confcooperative	Federazione Nazionale delle Cooperative Agricole e Agroalimentari – Confcooperative	National Federation of Agriculture and Food Cooperatives
LU	FIAL	Fédération des industries agro-alimentaires luxembourgeoises	Federation of the Luxembourgish Food Industry
MT	MEA	Malta Employers' Association	Malta Employers' Association
NL	FNLI	Federatie Nederlandse Levensmiddelen Industrie	Federation of Dutch Foodstuff Industry
	NZO	Nederlandse Zuivel Organisatie	Dutch Dairy Association
	VIGEF	Vereniging van de Nederlandse Groenten- en Fruitverwerkende Industrie	Association for the Dutch Vegetable and Fruit Processing Industry
	FWS	Nederlandse Vereniging Frisdranken, Waters, Sappen	Dutch Association for Soft Drinks, Water and Juices
	AKSV	Algemene Kokswaren en Snackproducenten Vereniging	General Association for Cookware and Snack Products
	COV	Centrale Organisatie voor de Vleessector	Central Organisation for the Meat Sector
	VBZ	De Vereniging voor de Bakkerij- en Zoetwarenindustrie	Association for the Baked Goods and Sweets Industry
	Gemzu	Werkgeversorganisatie Vereniging Gemeenschappelijke Zuivelsecretariaat	Employer Organisation Association Common Dairy Secretariat
	NEPLUVI	Vereniging van de Nederlandse Pluimveeverwerkende Industrie	Association for the Dutch Poultry Processing Industry
	NEVEDI	De Nederlandse Vereniging Diervoederindustrie	Dutch Association for the Animal Feed Industry

Representativeness of the European social partner organisations: Food and drink sector

MS	Abbreviation in original language	Full name in original language	Full name in English
NL	NBOV	Nederlandse Brood- en banketbakkers Ondernemers Vereniging	Dutch Association of Bread and Pastry Entrepreneurs
	NVB	Nederlandse Vereniging voor de Bakkerij	Dutch Association of Baking
	KVNW	Koninklijke Vereniging van Nederlandse Wijnhandelaren	Royal Association for Dutch Wine Traders
	SpiritsNL	SpiritsNL	SpiritsNL
	VisNed	Visfederatie	Fish Federation
	VNV (meat)	Vereniging voor de Nederlandse Vleeswarenindustrie	Association for the Dutch Meat Product industry
	VNV (fish)	De Vereniging van Nederlandse Visspecialisten	Association of Dutch Fish Specialists
PL	PFPZ	Polska Federacja Producentów Żywności	Polish Federation of Food Industry
PT	FIPA	Federação das Indústrias Portuguesas Agro-Alimentares	Federation of Portuguese Agro-Food Industries
	Ancipa	Associação Nacional de Comerciantes e Industriais de Produtos Alimentares	National Association of Traders and Industrialists of Food Products
	Casa do Azeite	Casa do Azeite – Associação do Azeite de Portugal	House of Olive Oil
	ANIL	Associação Nacional dos Industriais de Lacticínios	National Association of Dairy Manufacturers
	APIM	Associação Portuguesa da Indústria de Moagem e Massas	Portuguese Association of the Grinding and Pasta Industry
	ANIA	Associação Nacional dos Industriais de Arroz	National Association of Rice Manufacturers
	AICC	Associação Industrial e Comercial do Café	Industrial and Commercial Coffee Association
	IACA	Associação Portuguesa dos Industriais de Alimentos Compostos para Animais	Portuguese Association of Feed Processing Industries
	APIAM	Associação Portuguesa dos Industriais de Águas Minerais Naturais e de Nascente	Portuguese Association of Natural Mineral Water and Spring Water Industries
	Ancave	Associação Nacional dos Centros de Abate e Indústrias Transformadoras de Carne de Aves	National Association of Poultry Slaughter Centres and Processing Industries
	ITA	Associação Portuguesa dos Industriais de Tripas e Afins	Portuguese Association of Tripe Manufacturing and Similar Industries
	ALIF	Associação Livre dos Industriais pelo Frio	Free Association of Industrialists for Cold
	ANICP	Associação Nacional dos Industriais de Conservas de Peixe	National Association of Fish Canning Industries
	AIT	Associação dos Industriais de Tomate	Tomato Manufacturers Association
	ACIP	Associação do Comércio e da Indústria de Panificação, Pastelaria e Similares	Association of Bakery, Pastry and Similar Industries and Commerce
	AIPAN	Associação dos Industriais de Panificação, Pastelaria e Similares do Norte	Association of Bakery, Pastry and Similar Industries of the North

Representativeness of the European social partner organisations: Food and drink sector

MS	Abbreviation in original language	Full name in original language	Full name in English
	AIPL	Associação dos Industriais de Panificação de Lisboa	Lisbon Bakery Industry Association
	Asimpala	Associação dos Industriais de Panificação do Alto Alentejo	Association of Bakery Industries of Alto Alentejo
	ADCP	Associação das Adegas Cooperativas de Portugal	Association of Portuguese Wine Cooperatives
RO	Romalimenta	Federatia Patronala Romana din Industria Alimentara 'Romalimenta'	Romanian Employers' Federation of the Food Industry 'Romalimenta'
SE	Li	Livsmedelsföretagen	Swedish Food Federation
SI	GZS – ZKŽP	Gospodarska zbornica Slovenije, Zbornica kmetijskih in živilskih podjetij	Chamber of Commerce and Industry of Slovenia – Chamber of Agricultural and Food Enterprises
	ZZS	Zadružna zveza Slovenije	Cooperative Union of Slovenia
	ZDS	Združenje delodajalcev Slovenije	Association of Employers of Slovenia
SK	PKS	Potravinarskacomora Slovenska	Food Chamber of Slovakia
	SCS	Slovensky cukrovarnický spolok	Slovak Association of Sugar Producers
	SZVPS	Slovenske zdruzenie vyrobco piva a sladu	Slovak Beer and Malt Association
	ZVLal	Zdruzenie vyrobco liehu a liehovin na Slovensku	Association of Spirits Producers in Slovakia

Notes: Dark green shading denotes umbrella organisations. Light green shading denotes the member organisations of the umbrella organisation.

Source: Network of Eurofound Correspondents' contributions to this study, 2020

Table 49: Other sectors covered by trade unions and employer organisations

Sector	Number of TUs	Share of all TUs (%)	Member States	Number of EOs	Share of all EOs (%)	Member States
Agriculture, forestry and/or fisheries	21	23	BG, EE, FR, HR, HU, IT, LT, LV, PT, RO, SI, SK	8	7	DE, HR, IT, SI
Manufacturing ^(a)	19	21	EE, EL, ES, FI, HR, HU, LV, LT, MT, PL, PT, SK	11	10	BG, DE, DK, EL, IT, NL, PT, SK
All ^(b)	17	19	BE, BG, DK, ES, IE, LU, NL, PT, SE	4	4	EL, IE, MT, SI
Wholesale and retail trade ^(c)	16	18	BE, BG, CZ, DK, EL, FR, HU, MT, PT, SE	20	19	BG, DE, ES, FR, NL, PT, SI, SK
State administration, education, health and/or research	10	11	BG, CZ, DK, FI, HU, LV, MT, SK	1	1	EL
Accommodation and/or food service activities	9	10	BE, DE, EL, FR, MT, PL, PT, SE	1	1	IT
Services ^(d)	7	8	BE, DK, FI, FR, MT, PT	4	4	DK, NL, SI, SK
Transportation and storage	6	7	EL, ES, MT, PT	–	–	–
Energy and/or electricity	5	6	BG, ES, MT	2	2	EL, SI
Information and communication	4	4	DK, ES, FI	–	–	–
Construction	–	–	–	1	1	DK

Notes: ^(a) In the case of trade unions, sector parts include tobacco, textiles, wood, chemistry, pharmaceuticals and metal. In the case of employer organisations, sector parts include plastic, glass, woodworking, textiles, pharmaceuticals, tobacco and craft. ^(b) Trade unions include those that cover almost all sectors in the economy and those that cover some subgroups in all or most sectors, for example all white-collar workers in all sectors or the entire private sector (but not the public sector). ^(c) In the case of employer organisations, activities include import/export. ^(d) Activities were not specified, but include, for example, accounting and advisory work. EO, employer organisation; TU, trade union.

Trade unions tend to cover a larger number of additional sectors than employer organisations do, in terms of number of organisations and number of countries. In fact, only Austria and Cyprus have trade unions not engaged in any other sectors besides food and drink, while 13 countries do not have employer organisations covering other sectors (Austria, Belgium, Cyprus, Czechia, Estonia, Finland, Hungary, Latvia, Lithuania, Luxembourg, Poland, Romania and Sweden).

Among the trade unions, the most common additional sectors are agriculture, forestry and fisheries (23% of trade unions); manufacturing (21%); all (19%); and wholesale/retail trade (18%). These sectors are also at the top of the list for employer organisations, although in a slightly different order, with wholesale/retail trade being first (20%), followed by manufacturing (11%), agriculture, forestry and fisheries (8%) and all (4%). Other sectors common to both trade unions and employer organisations

are services (8% trade unions, 4% employer organisations), energy/electricity (6% trade unions, 2% employer organisations) and Horeca (10% trade unions, 1% employer organisations).

Table 50 provides the numbers of food and drink trade unions and employer organisations according to Eurofound representativeness studies for the commerce sector (2018), the agriculture sector (2016), Horeca (2018), the contract catering sector (2018) and the sugar sector (2017).

Table 50: Multisectoralism of food and drink trade unions (according to representativeness studies for commerce, agriculture, Horeca, contract catering and sugar)

Sector	90 food and drink trade unions	112 food and drink employer organisations
Commerce 110 trade unions 149 employer organisations	36 trade unions (40%) in 13 Member States: AT (2/2), BE (6/6), CY (4/4), DK (3/4), ES (3/5), FI (1/3), FR (5/5), IE (1/4), LU (2/2), MT (2/2), NL (2/2), PT (2/8), SE (3/6) None in 14 Member States: BG, CZ, DE, EE, EL, HR, HU, IT, LT, LV, PL, RO, SI, SK	5 employer organisations (4%) in 5 Member States: DK (1/1), EL (1/3), IT (2/8), SE (1/1), SI (1/3) None in 22 Member States: AT, BE, BG, CZ, CY, DE, EE, ES, FI, FR, HR, HU, IE, LT, LU, LV, MT, NL, PL, PT, RO, SK
Agriculture 65 trade unions 97 employer organisations	27 trade unions (30%) in 17 Member States: AT (2/2), BE (2/6), CY (2/4), DK (1/4), ES (2/5), FR (3/5), HR (1/3), HU (1/5), IE (1/4), IT (3/4), LT (1/2), MT (1/2), NL (2/2), PT (1/8), SE (2/6), SI (1/1), SK (1/2) None in 10 Member States: BG, CZ, DE, EE, EL, FI, LU, LV, PL, RO	4 employer organisations (4%) in 2 Member States: IT (2/8), SI (2/4)
Horeca 52 trade unions 58 employer organisations	17 trade unions (19%) in 12 Member States: AT (1/2), BE (3/6), DE (1/1), DK (1/4), ES (1/5), FR (2/5), IE (1/4), LU (1/2), MT (1/2), NL (1/3), PT (2/8), SE (2/6) None in 15 Member States: BG, CY, CZ, EE, EL, FI, HR, HU, IT, LT, LV, PL, RO, SI, SK	2 employer organisations (2%) in 2 Member States: SE (1/1), SI (1/3)
Contract catering 50 trade unions 30 employer organisations	16 trade unions (18%) in 11 Member States: AT (1/2), BE (3/6), DE (1/1), DK (1/4), FR (2/5), IE (1/4), LU (1/2), MT (1/2), NL (1/3), PT (2/8), SE (2/6) None in 16 Member States: BG, CY, CZ, EE, EL, ES, FI, HR, HU, IT, LT, LV, PL, RO, SI, SK	1 employer organisation (1%) in 1 Member State: SI (1/3)
Sugar	34 trade unions (38%) in 18 Member States: AT (2/2), BE (3/6), BG (2/5), CZ	10 employer organisations (9%) in 10 Member States: AT (1/2), BE (1/2), BG

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45 trade unions 17 employer organisations (CY, EE, IE, LV, LU, MT and SI were excluded from the study as there is no sugar production)	(1/1), DE (1/1), DK (1/4), FI (2/3), FR (5/5), HR (1/3), HU (1/5), IT (3/4), LT (1/2), NL (2/2), PL (2/4), PT (2/8), RO (1/2), SE (3/6), SK (1/2) None in 2 Member States: EL and ES	(1/6), DE (1/5), DK (1/1), FI (1/1), FR (1/15), HR (1/1), IT (1/8), SK (1/4) None in 7 Member States: CZ, EL, ES, NL, PL, PT, SE
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Annex 2: Trade unions and employer organisations not included in this study

Table 51: Trade unions not included in the analysis

MS	Abbreviation in national language	Full name in national language	Full name in English	Number of members	Involvement in collective bargaining	Affiliation to EFFAT	Reason for not including in main tables
FI	YTN	Ylemmät toimihenkilöt	Federation of Professional and Managerial Staff	3,000	No	No	It is not involved in collective bargaining and not affiliated to EFFAT (marked grey in Table 10).
FR	n.d.	Fédération UNSA Industrie et Construction	n.d.	n.d.	No	No	It has very weak involvement in this sector (marked grey in Table 10).
IT	FAMAR	n.d.	n.d.	n.d.	Yes	No	No information is available on their coverage in terms of companies and workers, but the collective agreements signed by these trade unions are likely to be significantly less relevant than the agreements signed by the major trade unions and employer organisations for which information was provided.
	Confamar	n.d.	n.d.	n.d.	Yes	No	
	Confsal SIA	n.d.	n.d.	n.d.	Yes	No	
	FAPI	n.d.	n.d.	n.d.	Yes	No	
	Confsal	n.d.	n.d.	n.d.	Yes	No	
	Fesica Confsal	n.d.	n.d.	n.d.	Yes	No	
	Fisals Confsal	n.d.	n.d.	n.d.	Yes	No	
	CIU	n.d.	n.d.	n.d.	Yes	No	
	USAE	n.d.	n.d.	n.d.	Yes	No	
	ACS	n.d.	n.d.	n.d.	Yes	No	
	CSE	n.d.	n.d.	n.d.	Yes	No	
	CSE Fulscam	n.d.	n.d.	n.d.	Yes	No	
	CSE FNILAPMI	n.d.	n.d.	n.d.	Yes	No	
	CSE FNLEI	n.d.	n.d.	n.d.	Yes	No	
	CSE DIR	n.d.	n.d.	n.d.	Yes	No	
	CSE COOP	n.d.	n.d.	n.d.	Yes	No	
	CSE FNILASU	n.d.	n.d.	n.d.	Yes	No	
	CSE FNILA	n.d.	n.d.	n.d.	Yes	No	
NL	De Unie	n.d.	n.d.	n.d.	Yes	No	There is no information on its membership and activities in the food and drink sector, or on the types of members it represents. It is also not formally part of the VCP (a trade union for professionals, not active in the food and drink sector).

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MS	Abbreviation in national language	Full name in national language	Full name in English	Number of members	Involvement in collective bargaining	Affiliation to EFFAT	Reason for not including in main tables
PT	SinCESAHT	Sindicato dos Trabalhadores do Comércio, Escritórios, Serviços, Alimentação, Hotelaria e Turismo	Trade Union of Workers in Offices, Services, Food, Hospitality and Tourism	n.d.	Yes	No	They have very few or no members in the sector, although they are involved in collective bargaining. They play only a second-order or marginal role in collective bargaining.
	Sindces	Sindicato Democrático do Comércio, Escritórios e Serviços	Democratic Trade Union, Offices and Services	n.d.	Yes	No	
	Sitemaq	Sindicato da Marinha Mercante, Indústrias e Energia	Union of Merchant Marine, Manufacturing and Energy	n.d.	Yes	No	
	Fiequimetal	Federação Intersindical das Indústrias Metalúrgicas, Químicas, Eléctricas, Farmacêutica, Celulose, Papel, Gráfica, Imprensa, Energia e Mina	Federation of Metallurgical, Chemical, Electrical, Pharmaceutical, Pulp, Paper, Printing, Press, Energy and Mining Industries	n.d.	Yes	No	

Source: Network of Eurofound Correspondents' contributions to this study, 2020

Table 52: Employer organisations not included in the analysis

MS	Abbreviation in national language	Full name in national language	Full name in English	Number of members	Involvement in collective bargaining	Affiliation to FoodDrink Europe	EO, BA or other	Representative based on legal criteria or mutual recognition	Reason for not including in main study (Tables 21 and 24)
Marked grey in Table 10									
BG	APBNB	Асоциацията на производителите на безалкохолни напитки в България	Bulgarian Soft Drinks Association	18	No	No	Branch organisation	Legal	Organisations are not involved in collective bargaining and not affiliated to FoodDrinkEurope – they are of minor relevance to the sector.
	AMB/АМБ	Асоциацията на месопреработвателите в България	Association of Meat Processors in Bulgaria	85	No	No	Branch organisation	Legal	
	NBSHS/НБСХС	Националният браншови съюз на хлебарите и сладкарите	National Branch Union of Bakers and Confectioners	1,115	No	No	Branch organisation	Legal	
	ООРАВ/АПМСБ	Сдружението на производителите на растителни масла и маслопродукти в България	Oilseed Oil Producers Association Bulgaria	20	No	No	n.d.	n.d.	
	UBM/СБМ	Съюз На Българските Мелничари	Union of Bulgarian Mills	18	No	No	n.d.	n.d.	
	UBB/СБМ	Съюз на животновъдите в България	Union of Animal Breeders in Bulgaria	n.d.	n.d.	No	n.d.	n.d.	
CY	ABCSSCM	Ένωση Βιομηχανιών Βιομηχανιών Μπισκότων, Σοκολάτας, Σνακ και Ζαχαροπλαστικής	Association of Biscuit, Chocolate, Snack and Sugar Confectionery Manufacturers	6	No	No	n.d.	n.d.	Organisations are not involved in collective bargaining and not affiliated to FoodDrinkEurope – they are of minor
	CAFFM	Κυπριακός Σύνδεσμος Παραγωγών Κατεψυγμένων Τροφίμων	Cyprus Association of Frozen Foods Manufacturers	13	n.d.	No	n.d.	n.d.	

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MS	Abbreviation in national language	Full name in national language	Full name in English	Number of members	Involvement in collective bargaining	Affiliation to FoodDrink Europe	EO, BA or other	Representative based on legal criteria or mutual recognition	Reason for not including in main study (Tables 21 and 24)
	CAIPAPS	Κυπριακός Σύνδεσμος Βιομηχανικών Συσκευασίων Αγροτικών Προϊόντων και Αλατιού	Cyprus Association of Industrialised Packing of Agricultural Products and Salt	7	n.d.	No	n.d.	n.d.	relevance to the sector.
	Camafarm	Κυπριακός Σύνδεσμος Παραγωγών και Προμηθευτών Ζωοτροφών, Πρόσθετων και Πρώτων Υλών	Cyprus Association of Manufacturers and Suppliers of Feedstuffs, Additives and Raw Materials	23	n.d.	No	n.d.	n.d.	
	CBA	Σύνδεσμος Αρτοποιιών Κύπρου	Cyprus Bakers Association	22	n.d.	No	n.d.	n.d.	
	CCFJMA	Σύνδεσμος Κατασκευαστών Κονσερβοποιών και Χυμών Φρούτων Κύπρου	Cyprus Canners and Fruit Juice Manufacturers Association	2	n.d.	No	n.d.	n.d.	
	CDPMA	Κυπριακός Σύνδεσμος Βιομηχανών Γαλακτοκομικών Προϊόντων	Cyprus Dairy Products Manufacturers Association	24	n.d.	No	n.d.	n.d.	
	CFMA	Κυπριακός Σύνδεσμος Αλευροποιών	Cyprus Flour Manufacturers Association	4	n.d.	No	n.d.	n.d.	
	CICMA	Σύνδεσμος Παγωτοποιιών Κύπρου	Cyprus Ice Cream Manufacturers Association	13	n.d.	No	n.d.	n.d.	
	CMMA	Σύνδεσμος Κατασκευαστών Μακαρονιών Κύπρου	Cyprus Macaroni Manufacturers Association	4	n.d.	No	n.d.	n.d.	
	CMPA	Κυπριακός Σύνδεσμος Προϊόντων Κρέατος Σύνδεσμος Ιδιοκτητών Ελαιοτριβείων Κύπρου	Cyprus Meat Products Association	5	n.d.	No	n.d.	n.d.	
	COMOA	Σύνδεσμος Ιδιοκτητών Ελαιοτριβείων Κύπρου	Cyprus Olive Mills Owners Association	23	n.d.	No	n.d.	n.d.	

Representativeness of the European social partner organisations: Food and drink sector

MS	Abbreviation in national language	Full name in national language	Full name in English	Number of members	Involvement in collective bargaining	Affiliation to FoodDrink Europe	EO, BA or other	Representative based on legal criteria or mutual recognition	Reason for not including in main study (Tables 21 and 24)
	PADNP	Κυπριακός Σύνδεσμος Εμφιαλωτών Νερού	Pancyprian Association of Dry Nut Processors	2	n.d.	No	n.d.	n.d.	
	CAWB	Κυπριακός Σύνδεσμος Εμφιαλωτών Νερού	Cyprus Association of Water Bottlers	6	n.d.	No	n.d.	n.d.	
	CBA	Κυπριακός Σύνδεσμος Ζυθοποιών	Cyprus Breweries Association	2	n.d.	No	n.d.	n.d.	
	CWA	Σύνδεσμος Οινοποιών Κύπρου Κυπριακός Σύνδεσμος Εμφιαλωτών	Cyprus Wineries Association	17	n.d.	No	n.d.	n.d.	
DK	DLF	Dansk Landbrug og Fødevarer	Danish Agriculture and Food Council	<400	No	No	BA	Mutual recognition	This organisation is not involved in collective bargaining and not affiliated to FoodDrinkEurope – it is of minor relevance to the sector.
EE	EPKK	Eesti Põllumajandus-Kaubanduskoda	Estonian Chamber of Agriculture and Commerce	30+	No	No	BA	There are no representativeness criteria in Estonia. It is a respected BA in the sector.	Organisations are not involved in collective bargaining and not affiliated to FoodDrinkEurope – they are of minor relevance to the sector.
	TKL	Eestimaa Talupidajate Keskliit	Central Union of Estonian Farmers	300	No	No	BA	There are no representativeness criteria in Estonia. It is a respected BA in the sector.	

Representativeness of the European social partner organisations: Food and drink sector

MS	Abbreviation in national language	Full name in national language	Full name in English	Number of members	Involvement in collective bargaining	Affiliation to FoodDrink Europe	EO, BA or other	Representative based on legal criteria or mutual recognition	Reason for not including in main study (Tables 21 and 24)
MS	EÕL	Eesti Õlletootjate Liit	Estonian Beer Manufacturers Association	2	n.d.	No	n.d.	n.d.	
	AML	Alkoholitootjate ja Maaletoojate Liit	Association of Estonian Alcohol Producers and Importers	12	n.d.	No	n.d.	n.d.	
	EL	Eesti Leivaliit	Estonian Association of Bakeries	<15	n.d.	No	n.d.	n.d.	
	TML	Talumeiereide Liit	Estonian Association of Farm Dairies	n.d.	n.d.	No	n.d.	n.d.	
	EKL	Eesti Kalaliit	Estonian Fish Association	21	n.d.	No	n.d.	n.d.	
	EJL	Eesti Juustuliit	Estonian Cheese Association	13	n.d.	No	n.d.	n.d.	
	KTL	Karastusjookide Tootjate Liit	Estonian Association of Soft Drink Producers	n.d.	n.d.	No	n.d.	n.d.	
	EVL	Eesti Väikepruulijate Liit	Estonian Association of Small Brewers	46	n.d.	No	n.d.	n.d.	
EL	ENEAP	n.d.	Hellenic Association of Drinks Distributors	n.d.	n.d.	No	n.d.	n.d.	Both organisations are advisory, not involved in collective bargaining and not affiliated to FoodDrinkEurope.
	SEAOP	n.d.	Greek Federation of Spirits Producers	n.d.	n.d.	No	n.d.	n.d.	
ES	CdE	Cerveceros de España	Brewers of Spain	43	No	No	BA	Legal	Organisations are not involved in

Representativeness of the European social partner organisations: Food and drink sector

MS	Abbreviation in national language	Full name in national language	Full name in English	Number of members	Involvement in collective bargaining	Affiliation to FoodDrink Europe	EO, BA or other	Representative based on legal criteria or mutual recognition	Reason for not including in main study (Tables 21 and 24)
	AEFH	n.d.	National Association of Ice Cream Manufacturers	n.d.	n.d.	No	n.d.	n.d.	collective bargaining and not affiliated to FoodDrinkEurope – they are of minor relevance to the sector. CdE is affiliated to FIAB.
	TUMA	n.d.	National Association of Nougat Candy and Marzipan Manufacturers	n.d.	n.d.	No	n.d.	n.d.	
	ASEPRHU	n.d.	Spanish Association of Eggs Manufacturers	n.d.	n.d.	No	n.d.	n.d.	
	UNIADE	n.d.	Association of Spanish Rice Millers	n.d.	n.d.	No	n.d.	n.d.	
	AEFPA	n.d.	Spanish Association of Pasta Manufacturers	n.d.	n.d.	No	n.d.	n.d.	
FR	AEG	Association des entreprises des glaces	Ice Companies Association	8	n.d.	No	n.d.	n.d.	Organisations are not involved in collective bargaining and not affiliated to FoodDrinkEurope – they are of minor relevance to the sector. All organisations are affiliated to ANIA.
	LFBGF	Les Fabricants de biscuits et gâteaux de France	Biscuit and Cake Manufacturers of France	n.d.	n.d.	No	n.d.	n.d.	
	SPCM	Syndicat de la panification croustillante et moelleuse	Crunchy and Soft Bread Syndicate	n.d.	n.d.	No	n.d.	n.d.	
	SAC	Syndicat des apéritifs à croquer	Appetizers Union	n.d.	n.d.	No	n.d.	n.d.	
	SFNS	Syndicat français de la nutrition spécialisée	French Union of Specialised Nutrition	n.d.	n.d.	No	n.d.	n.d.	
	SFCPd	Syndicat français des céréales petit déjeuner	French Breakfast Cereals Union	n.d.	n.d.	No	n.d.	n.d.	
	SFCafe	Syndicat français du café	French Coffee Union	n.d.	n.d.	No	n.d.	n.d.	

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MS	Abbreviation in national language	Full name in national language	Full name in English	Number of members	Involvement in collective bargaining	Affiliation to FoodDrink Europe	EO, BA or other	Representative based on legal criteria or mutual recognition	Reason for not including in main study (Tables 21 and 24)
	SFChocolat	Syndicat français du chocolat	French Chocolate Union	n.d.	n.d.	No	n.d.	n.d.	
HU	MPSZ	Magyar Pékszövetség	Hungarian Bakers' Association	320	No	No	Professional organisation	Not applicable	Organisations are not involved in collective bargaining and not affiliated to FoodDrinkEurope – they are of minor relevance to the sector.
	MGTSZ	Magyar Gabonafeldolgozók, Takarmánygyártók és Kereskedők Szövetsége	Hungarian Grain and Feed Association	35	No	No	BA	Mutual recognition	
	MHSZ	Magyar Húsiparosok Szövetsége	Hungarian Meat Industry Federation	21	No	No	BA	Mutual recognition	
	Magyüsz	Magyar Ásványvíz, Gyümölcslé és Üdítőital Szövetség	Hungarian Mineral Water, Fruit Juice and Soft Drink Association	28	n.d.	No	BA	Mutual recognition	
	MA-HAL	Magyar Akvakultúra és Halászati Szakmaközi Szervezet	Hungarian Aquaculture and Fisheries Inter-Branch Organisation	<100	n.d.	No	Branch organisation	Legal	
LT	LMP	Lietuvos maisto pramonė	Lithuanian Food Industry Association	n.d.	n.d.	No	BA	Legal	Organisations are not involved in collective bargaining and not affiliated to FoodDrinkEurope – they are of minor relevance to the sector.
	LGPA	Lietuvos grūdų perdirbėjų asociacija	Lithuanian Grain Processors' Association	n.d.	n.d.	No	BA	Legal	
	LPAPC	Lietuvos pienininkų asociacija „Pieno centras“	Association of Lithuanian Milkmen 'Milk Centre'	n.d.	n.d.	No	BA	Legal	
	LMPA	Lietuvos mėsos perdirbėjų asociacija	Lithuanian Meat Processors' Association	n.d.	n.d.	No	BA	Legal	
	LAG	Lietuvos aludarių gildija	Guild of Lithuanian Beer Producers	n.d.	n.d.	No	BA	Legal	

Representativeness of the European social partner organisations: Food and drink sector

MS	Abbreviation in national language	Full name in national language	Full name in English	Number of members	Involvement in collective bargaining	Affiliation to FoodDrink Europe	EO, BA or other	Representative based on legal criteria or mutual recognition	Reason for not including in main study (Tables 21 and 24)
LV	LPUF	Latvijas Pārtikasuzņēmumufederācija	Latvian Federation of Food Companies	Approx. 60% of members	No	No	BA	Legal	This organisation is not involved in collective bargaining and not affiliated to FoodDrinkEurope – it is of minor relevance to the sector.
NL	Nederlandse Bouwers	Nederlandse Bouwers	Dutch Brewers	14	No	No	BA	Both	Organisations are not involved in collective bargaining and not affiliated to FoodDrinkEurope – they are of minor relevance to the sector. Both are affiliated to FNLI.
	VAVI	Vereniging voor de Aardappelverwerkende Industrie	Association for the Potato Processing Industry	6	No	No	BA	Mutual recognition	
PL	PZPPS	Polski Związek Pracodawców Przemysłu Spożywczego	Polish Association of Food Industry Employers	n.d.	n.d.	No	n.d.	n.d.	Organisations are not involved in collective bargaining and not affiliated to FoodDrinkEurope – they are of minor relevance to the sector.
	ZPPP-BP	Związek Pracodawców Przemysłu Piwowarskiego – Browary Polskie	Association of Brewing Industry Employers – Polish Breweries	3	n.d.	No	n.d.	n.d.	

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MS	Abbreviation in national language	Full name in national language	Full name in English	Number of members	Involvement in collective bargaining	Affiliation to FoodDrink Europe	EO, BA or other	Representative based on legal criteria or mutual recognition	Reason for not including in main study (Tables 21 and 24)
SK	SPKK	Slovenska poľnohospodárska a potravinárska komora	Slovak Agriculture and Food Chamber	313	No	No	BA	Legal	This organisation is not involved in collective bargaining and not affiliated to FoodDrinkEurope – it is of minor relevance to the sector.
Not mentioned in any tables; see explanation in Chapter 2									
IT	For Italy	n.d.	n.d.	n.d.	Yes	No	n.d.	n.d.	They are involved in collective bargaining through signing minor agreements. However, such agreements are significantly less relevant than those signed by the major TUs and EOs for which fact sheets were provided.
	AIC	n.d.	n.d.	n.d.	Yes	No	n.d.	n.d.	
	FAGRI	n.d.	n.d.	n.d.	Yes	No	n.d.	n.d.	
	Assotecnologie Fagri	n.d.	n.d.	n.d.	Yes	No	n.d.	n.d.	
	Imprenditori & Imprese	n.d.	n.d.	n.d.	Yes	No	n.d.	n.d.	
	Confederazione e Coinar	n.d.	n.d.	n.d.	Yes	No	n.d.	n.d.	
	CIFA	n.d.	n.d.	n.d.	Yes	No	n.d.	n.d.	
	Fedarcom CIFA	n.d.	n.d.	n.d.	Yes	No	n.d.	n.d.	

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MS	Abbreviation in national language	Full name in national language	Full name in English	Number of members	Involvement in collective bargaining	Affiliation to FoodDrink Europe	EO, BA or other	Representative based on legal criteria or mutual recognition	Reason for not including in main study (Tables 21 and 24)
	Unimpresa	n.d.	n.d.	n.d.	Yes	No	n.d.	n.d.	
	Unimpresa Agricoltura	n.d.	n.d.	n.d.	Yes	No	n.d.	n.d.	
	CIDEC	n.d.	n.d.	n.d.	Yes	No	n.d.	n.d.	
	CEPA A	n.d.	n.d.	n.d.	Yes	No	n.d.	n.d.	
	Esaarco	n.d.	n.d.	n.d.	Yes	No	n.d.	n.d.	
	FEAPI	n.d.	n.d.	n.d.	Yes	No	n.d.	n.d.	
	FEAGRI	n.d.	n.d.	n.d.	Yes	No	n.d.	n.d.	
	FIALTE	n.d.	n.d.	n.d.	Yes	No	n.d.	n.d.	
	Confimprese-Italia	n.d.	n.d.	n.d.	Yes	No	n.d.	n.d.	
	Confimprese Artigianato	n.d.	n.d.	n.d.	Yes	No	n.d.	n.d.	
EL	POESE	Πανελλήνια Ομοσπονδία Εστιατορικών & Συναφών Επαγγελματιών	Pan Hellenic Federation of Restaurant and Related Professionals		Yes	No	n.d.	n.d.	They are members of GSEVEE, which represents them and which does not sign the collective
	OAE	Ομοσπονδία Αρτοποιιών Ελλάδος	Federation of Bakeries of Greece		Yes	No	n.d.	n.d.	

Representativeness of the European social partner organisations: Food and drink sector

MS	Abbreviation in national language	Full name in national language	Full name in English	Number of members	Involvement in collective bargaining	Affiliation to FoodDrink Europe	EO, BA or other	Representative based on legal criteria or mutual recognition	Reason for not including in main study (Tables 21 and 24)
	OEZE	Ομοσπονδια Επαγγελματιοβιοτεχνων Ζαχαροπλαστων Ελλαδας	Federation of Professional Confectioners of Greece		Yes	No	n.d.	n.d.	agreements signed by these organisations.

Notes: BA, business association; EO, employer organisation; TU, trade union.

Source: Network of Eurofound Correspondents' contributions to this study, 2020

Annex 3: Network of Eurofound Correspondents

Country	Correspondent(s)	Organisation
Austria	Bernadette Allinger	Working Life Research Centre
Belgium	Dries Van Herreweghe	HIVA Research Institute, KU Leuven
Bulgaria	Ekaterina Ribarova	Institute of Social and Trade Union Research
Croatia	Predrag Bejakovic and Irena Klemencic	Institute of Public Finance
Cyprus	Pavlos Kalosinatos	Cyprus Labour Institute – Pancyprian Federation of Labour
Czechia	Soňa Veverková	Research Institute for Labour and Social Affairs
Denmark	Carsten Jorgensen	FAOS, University of Copenhagen
Estonia	Ingel Kadarik	Praxis Centre for Policy Studies
Finland	Amanda Kinnunen	Oxford Research AB
France	Frédéric Turlan	IR Share
Germany	Sandra Vogel	German Economic Institute
	Birgit Kraemer	Institute for Economic and Social Research, Hans Böckler Foundation
Greece	Penny Georgiadou	GSEE Labour Institute
Hungary	Nóra Krokovay	Kopint-Tárki Institute for Economic Research
Ireland	Colman Higgins	IRN Publishing
Italy	Anna Mori	Department of Social and Political Sciences, University of Milan
Latvia	Krišs Karnītis	EPC Ltd
Lithuania	Inga Blaziene	Lithuanian Social Research Centre
Luxembourg	Franz Clément	Luxembourg Institute of Socio-Economic Research
Malta	Louis Grech	University of Malta
Netherlands	Amber van der Graaf	Panteia BV
Poland	Barbara Surdykowska	Foundation Institute of Public Affairs
Portugal	Reinhard Naumann	Friedrich Ebert Foundation, Lisbon
Romania	Simona Ghita and Alexandra Deliu	European Institute of Romania
Slovakia	Miroslava Kordošová	Institute for Labour and Family Research
Slovenia	Barbara Lužar	Faculty of Social Sciences, University of Ljubljana
Spain	Oscar Molina	Institute for Labour Studies, Autonomous University of Barcelona
Sweden	Sirin Celik	Oxford Research AB
United Kingdom	Claire Evans	Warwick Business School

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This study provides information allowing for an assessment of the representativeness of the actors involved in the European sectoral social dialogue committee for the Food and drink sector. Their relative representativeness legitimises their right to be consulted, their role and effective participation in the European sectoral social dialogue and their capacity to negotiate agreements.

The aim of Eurofound's studies on representativeness is to identify the relevant national and European social partner organisations in the field of industrial relations in the EU Member States. This study identifies EFFAT – representing employees – and FoodDrinkEurope – representing employers – as the representative European-level social partner organisations in the food and drink sector.

The European Foundation for the Improvement of Living and Working Conditions (Eurofound) is a tripartite European Union Agency established in 1975. Its role is to provide knowledge in the area of social, employment and work-related policies according to Regulation (EU) 2019/127.

