

Industrial relations and social dialogue

Representativeness of the European social partner organisations: Woodworking sector



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When citing this report, please use the following wording:

Eurofound (2023), *Representativeness of the European social partner organisations: Woodworking sector*, Sectoral social dialogue series, Dublin.

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Eurofound project: Representativeness studies (170203)

Provider: Network of Eurofound Correspondents (see Annex 5)

PDF: ISBN 978-92-897-2375-6 doi:10.2806/561286 TJ-03-23-442-EN-N

This report and any associated materials are available online at <https://eurofound.link/ef23026>

It is part of Eurofound's Sectoral social dialogue series. See the full series at <https://eurofound.link/efs006>

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Country codes

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 social partners – that is, the trade unions and employer organisations – in the woodworking 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 specificities of and trends in employment in the woodworking sector; an analysis of the social partner organisations in all of the 27 EU Member States (EU27); 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 woodworking sector. The study assesses the representativeness of the European social partner organisations: the European Federation of Building and Woodworkers (EFBWW) and the European Confederation of Woodworking Industries (CEI-Bois).

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 a criterion to be eligible 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 provide guidance for future efforts to build the capacity of European social partner organisations.

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

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

To assess representativeness, this study first identifies the relevant national social partner organisations in the woodworking sector before analysing the structure of the sector’s relevant European organisations, in particular their membership composition. This 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’ – that is, trade unions and employer associations that have members in the sector and are involved in sectoral collective bargaining and/or in consultations over sectoral policies. In terms of territorial coverage, the study includes the 27 EU Member States.

0.2. Background on the woodworking sector ESSDC

CEI-Bois was established in 1952, and the EFBWW in 1958. However, it was only in 1991 that they started cooperating, following a consultation with the European Commission on the issue of wood dust. Those first talks of 1991 did not continue, until an informal working group for the woodworking sector was started in 1994 (European Commission, 2010). These informal social dialogue activities from the 1990s were formalised in an ESSDC for the woodworking sector, which was established in 2000.

In the early years of the European sectoral social dialogue, it was enlargement and the link with the forest-based industries that changed the context of the European woodworking sector. Because Austria, Finland and Sweden have a high proportion of afforested land, the enlargement of the EU from 12 to 15 Member States in 1995 doubled the surface area of the EU covered by forest, and increased its self-sufficiency with regard to timber supplies, from 55% in 1994 to 91% in 1996 (ETUI, undated). To obtain the remaining 9% or 10% of supplies, the European woodworking industry is heavily dependent on imports, of which about 60% came from Russia in 2010 (European Commission, 2010).

About half of the joint opinions produced through the European woodworking sector-related social dialogue are about aspects of industrial policy related to sustainable forestry, or about policies related to climate change and their impact on the supply of raw material for the sector. In 2000, a book chapter analysed specific workers' views on sustainable forestry (Bowling, 2000), illustrating the link between forestry jobs and jobs involving the processing of wood (or other forest resources), because the social issues of both groups of workers are similar. The way in which the downstream processing of forest products is carried out can have a huge effect on forest recovery, and ultimately the volume harvested. From a wider political perspective, the link between the overuse of resources and poverty also highlights the importance of European social dialogue in the woodworking sector.

The first joint opinion of the European social partners in the woodworking sector about sustainable forestry was agreed on in 1997.¹ It indicated that deforestation in tropical countries leads to a cycle of poverty, social inequality, the felling of trees for agriculture and increased use of fuel. European social partners asked the Commission and Member States to break this cycle by making the resources necessary for development available in those countries. This opinion complemented the preparatory work for the forestry strategy, adopted in December 1998 by the European Council, which included principles of sustainable forest management. The adoption of the first joint opinion coincided with the publication of the 1998 Commission communication and Commission Decision 98/500/EC of 1998 on the establishment of sectoral dialogue committees promoting the dialogue between the social partners at European level, which led to the establishment of the ESSDC for the woodworking sector in 2000.

Over the years, European social dialogue in the woodworking sector has resulted in 17 jointly agreed texts. The years marked in green in Table 1 indicate joint opinions about aspects of industrial policy related to sustainable forestry or the impact of climate change policies on the availability of raw materials for the woodworking sector, or about the role of social partners in assessing the need for new skills. European social dialogue in the woodworking sector has also frequently focused on occupational health and safety (OHS) matters. The years marked in blue represent joint opinions on

¹ Available at <https://www.worker-participation.eu/EU-Social-Dialogue/Sectoral-ESD/Woodworking/Joint-texts>

OHS-related matters. A complete list of all joint opinions can be found in Section 3.9 and in the European Commission database of European sectoral social dialogue texts.²

Table 1: Joint opinions agreed on by the European social partners in the woodworking sector

Period	Years when joint opinions were issued	Number of texts agreed on
1991–1999 (informal dialogue)	1994, 1997	2
2000–2009 (first decade when there was a formal ESSDC)	2001, 2002, 2003, 2006, 2007, 2008	6
2010–2019	2010, 2013, 2018	3
2020–2023	2020, 2020, 2021, 2021, 2021, 2022	6
Total		17

Notes: The years in green indicate joint texts agreed about aspects of industrial policy related to sustainable forestry and the impact of climate change policies on the sector. The years marked in blue indicate joint opinions related to health and safety matters.

Most of the joint opinions are addressed to European institutions and do not include actual commitments of the social partners themselves, or properly follow up on any commitments made. The only exception is the 2002 code of conduct on corporate responsibility, which is addressed to the national member organisations. However, there is no indication that the implementation of the code has been monitored. The low number of opinions in 2010–2019 is in contrast with the higher number of outputs from 2020 to 2022, in which six joint opinions were issued. The 2018 joint statement on OHS was issued together with the European social partners in the furniture sector, and points to content-based cooperation between the ESSDCs for the woodworking and furniture sectors. Since 2016, joint meetings have been held on the topic of OHS and vocational training.

0.3. Definitions and methodology

The methodology applied in this study is linked to the criteria identified in Commission Decision 98/500/EC (European Commission, 1998): sector-relatedness, membership and organisational capacity. Each of these criteria will be defined in this section.

With regard to **sector-relatedness**, the demarcation of the woodworking sector has been established as covering Nomenclature of Economic Activities (NACE) (Rev. 2) code 16 (manufacture of wood products).³ It includes the economic activities in Table 2.

²

<https://ec.europa.eu/social/main.jsp?catId=521&langId=en&day=&month=&year=§orCode=SECT05&theMeCode=&typeCode=&recipientCode=&mode=searchSubmit&subscribe=Search>

³ NACE Rev. 2 was published in 2008. For the demarcation of a specific sector, reference is made to one NACE code or a set of codes, usually at the most detailed level (four digits). In this case, a single two-digit NACE code has been used. The terms used by NACE code 16 to define the woodworking sector distinguish between the production of different types of wood products.

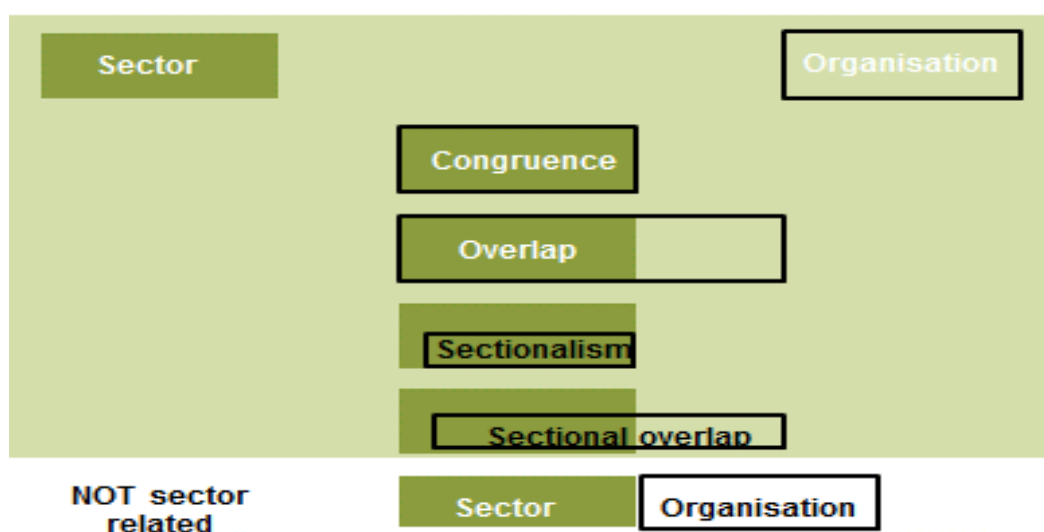
Table 2: Demarcation of the woodworking sector based on NACE Rev. 2 code 16 (manufacture of wood products)

NACE code	Activity
16.10	Sawmilling and planing of wood
16.21	Manufacture of veneer sheets and wood-based panels
16.22	Manufacture of assembled parquet floors
16.23	Manufacture of other builders' carpentry and joinery
16.24	Manufacture of wooden containers
16.29	Manufacture of other products of wood

The membership domains of trade unions and employer organisations may fall within this demarcation of the sector, which is a type of sector-relatedness known as 'congruence'. If the membership domain of an organisation goes beyond the woodworking sector as defined here, it is an 'overlapping representational domain'. An organisation is 'sectional' if it covers a part of the woodworking sector and no other sectors, whereas 'sectional overlap' means that an organisation covers part of the woodworking sector and organises employees and employers from other sectors too.

Figure 1 presents the four different types of sector-relatedness.

Figure 1: Different types of sector-relatedness



Membership is another important aspect of representativeness. This study looks at two dimensions of membership: first, the geographical coverage of the EU-level organisations (in how many Member States an EU-level trade union/employer organisation has affiliates) and, second, the organisational density of the national affiliates. The study also considers whether the EU-level players organise most, or at least the most significant, of the national-level players, in terms of their density and involvement in sectoral collective bargaining and/or policymaking.

The **organisational capacity** of the European social partners is analysed in terms of their ability to act on behalf of their members and to conclude binding agreements or commit to actions that can be implemented or monitored EU-wide through the support of their affiliates. To assess the

organisations' capacity to negotiate, it is necessary to analyse their institutional objectives and decision-making structures, as provided for in their statutes; the expected outcomes of their actions, for instance whether their institutional mission includes the possibility of negotiating and coming to agreements with other parties; and the processes through which the organisations obtain a mandate, support and approval from their member organisations in the negotiation process.

The involvement of social partners' members in national-level collective bargaining (or in social dialogue about sectoral policies) is important, as it shows that the affiliates can obtain a mandate to negotiate on behalf of their members (at least at national level, which could then translate to a mandate to negotiate at EU level). Where a mandate for European negotiations is implicit or explicit, it allows 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 of those represented on the ESSDC to act autonomously to implement EU-wide agreements contributes to the committee's effectiveness.

Finally, representativeness also depends on organisations' structures and resources, their capacity to encourage the active participation of their members and harmonise the different interests of member organisations, and their ability to act autonomously at European level. Effective participation in the ESSDC is assessed on the basis of presence at committee meetings in the two-year period before the publication of this report (taking into account the COVID-19 pandemic, when ESSDC processes took place in virtual environments with tools and procedures that did not always optimally support the European social partners' capacity to negotiate). Involving internal structures within the European organisations when preparing for ESSDC meetings and discussing social affairs can increase efficiency and ensure that more organisations feel represented than just those that directly participate in the meetings.⁴

0.4. Data collection and quality control measures

Representativeness studies combine top-down and bottom-up approaches. The top-down approach includes all sector-related affiliates of the European associations the EFBWW and CEI-Bois, while the bottom-up approach looks for the organisations involved in woodworking sector-related collective bargaining and social dialogue in the EU Member States covered by this study and their membership of European-level organisations. The kick-off meeting at the start of this study was held on 27 January 2021.

Except where otherwise noted, this study draws on the country studies provided by the Network of Eurofound Correspondents. Where precise quantitative data could not be obtained, estimates were provided rather than leaving a question blank. Thus, quantitative data (for example, used to calculate density rates) used in the report may stem from three sources, namely:

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

⁴ More in-depth definitions of key terms can be found in Eurofound's European Industrial Relations Dictionary, available at <https://www.eurofound.europa.eu/en/european-industrial-relations-dictionary>

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

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 2021 and October 2021. Subsequently, Eurofound research managers and the authors of this report checked the consistency of the national contributions and, if necessary, asked the national correspondents to revise them between December 2021 and February 2022.

An overview of the data collected in this study was made available to the European social partners to allow their affiliates to double-check and comment on the interim findings between June and August 2022. Once the data tables had been updated, the draft report was finalised in the second half of 2022 and further streamlined at the beginning of 2023. In April 2023, the social partners were consulted on the draft report in an initial informal (pre-evaluation) consultation. With their comments as guidance, the draft report was finalised and prepared for formal written evaluation by Eurofound's Industrial Relations Advisory Committee and the European-level sectoral social partners identified in the report.

All actors and organisations mentioned in this report were invited to check the consistency of the information in this report, to ensure that the bottom-up approach included all the relevant sector-related organisations from their countries. As different social partner organisations can consider the information reported on other organisations in the same country and, if necessary, comment on the credibility or accuracy of the information on other organisations representing similar memberships, this process involves an element of mutual verification and recognition.

This report was formally evaluated through a written procedure in June 2023 by the Industrial Relations Advisory Committee, which consists of representatives of both sides of industry, governments and the European Commission, in addition to the European-level sectoral social partners identified in the report. After this formal evaluation, the report was edited and prepared for publication in the second half of 2023.

0.5. Structure of the report

The report consists of three main parts, beginning with a brief summary of the economic background and specificities of employment in the woodworking sector. It then analyses the relevant social partner organisations in the 27 EU Member States. Chapter 3 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 whether the representativeness of the European social partner organisations and their national affiliates is sufficient for participation in European social dialogue. Rather, the information and analyses provided in this report provide the evidence base for further efforts and decisions of the social partners themselves and the European Commission.

1. Specificities of employment in the sector

This chapter describes the economic background of the woodworking sector in terms of employment and company structure. It aims to outline the scope of the workforce and the companies in the sector that are represented by the trade unions and employer organisations in the following chapter. This sector covers activities defined by NACE (Rev. 2) code 16, including sawmilling and the manufacture of wood, cork, straw and plaiting products (except furniture). It excludes forestry and logging.

1.1. Employment in the woodworking sector

In 2019, the woodworking sector in the EU27 employed some 792,239 people, representing 0.7% of total employment. Table 3 represents the number of employees per country and subsector and the percentage of woodworking sector workers as a share of all employees in each country and as a share of the sectoral workforce in the EU27. In absolute numbers, the woodworking sector is largest in Germany (135,588 employees) and Poland (123,410 employees), accounting for 32.7% of the total woodworking workforce in the EU27. In Italy (64,585), France (57,925), Romania (47,937) and Spain (47,697), the number of people employed in the woodworking sector is close to 50,000 or more, accounting for another 27.5% of the total woodworking workforce in the EU27. Considering the share of employment in the woodworking sector in total national employment, the share is largest in Estonia, where 4.24% of the workforce is employed in the woodworking sector. Latvia has the next largest share, at 3.85%.

Representativeness of the European social partner organisations: Woodworking sector

Table 3: Number of employees in the woodworking sector and percentage of employees in each subsector, 2019

Member State	Manufacture of wood (NACE 16)	Sawmilling and planing (NACE 16.10) (%)	Manufacture of panels (NACE 16.21) (%)	Manufacture of parquet (NACE 16.22) (%)	Manufacture of builders' carpentry (NACE 16.23) (%)	Manufacture of wooden containers (NACE 16.24) (%)	Manufacture of other products of wood (cork) (NACE 16.29) (%)	Share of sectoral workforce in the EU27 (%)	Share of total national workforce (%)
EU27	792,239	25.2	12.5	3.5	37.8	10.9	10.1	100.00	0.70
DE	135,588	19.1	12.8	1.3	50.9	8.8	7.1	17.11	0.47
PL	123,410	26.7	12.6	4.7	31.5	10.4	14.1	15.58	1.51
IT	64,585	11.2	12.8	0.9	50.6	14.1	10.4	8.15	0.58
FR	57,925	33.6	8.8	0.6	29.7	21.4	5.8	7.31	0.39
RO	47,937	49.3	13.9	1.3	21.9	4.4	9.1	6.05	1.21
ES	47,697	13.7	17.9	2.6	33.1	21.0	11.8	6.02	0.44
SE	33,119	39.4	c	c	47.8	5.4	3.8	4.18	1.15
AT	32,633	33.0	13.0	3.8	43.9	3.8	2.5	4.12	1.23
CZ	28,975	22.1	11.2	0.7	41.0	13.4	11.7	3.66	0.99
PT	27,177	16.8	6.8	0.7	32.3	6.0	37.4	3.43	0.93
LV	23,208	51.4	12.0	0.2	19.3	9.3	7.8	2.93	3.85
FI	21,307	27.8	29.0	0.4	37.0	4.3	1.6	2.69	1.47
LT	19,106	33.8	6.7	5.9	31.4	10.6	11.6	2.41	2.11
EE	17,304	u	c	c	u	u	u	2.18	4.24
HR	17,035	42.8	13.2	14.2	13.3	7.6	9.0	2.15	1.69
HU	15,448	23.8	10.8	1.7	37.1	18.6	8.1	1.95	0.65
BG	14,246	37.2	17.3	0.3	8.1	15.0	22.0	1.80	0.81
SK	14,216	39.5	12.3	1.3	22.7	8.0	16.1	1.79	1.14
NL	13,239	11.1	2.1	2.7	63.6	14.3	6.2	1.67	0.25
BE	10,282	15.4	32.4	0.9	36.5	9.6	5.1	1.30	0.44
SI	7,558	29.4	11.9	c	39.8	c	11.6	0.95	1.30
DK	7,548	13.4	6.8	c	63.9	10.3	c	0.95	0.45
IE	5,459	20.3	11.4	c	51.0	c	10.4	0.69	0.37
EL	4,531	19.8	15.0	1.3	38.7	13.7	11.5	0.57	0.23
CY	1,935	0.7	c	0	94.1	c	1.8	0.24	0.71
LU	671	c	c	0	c	18.3	0.0	0.08	0.23
MT	100	0	c	c	26.0	c	34.0	0.01	0.07

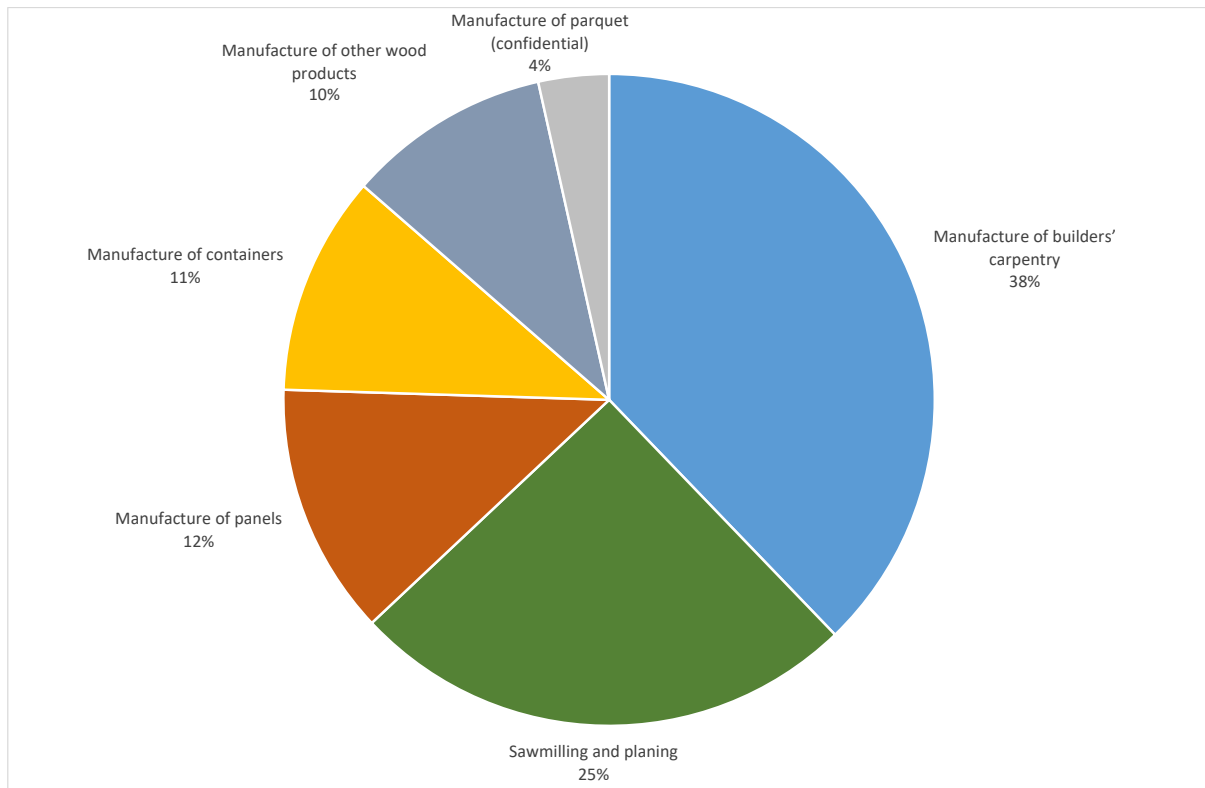
Notes: c, confidential; u, low reliability.

Source: Eurostat [SBS_NA_IND_R2]

The green column on the left of Table 3 indicates the number of employees in the sector in each Member State, and the blue column gives this number as a proportion of the total workforce in the sector in the EU27. The green column on the right indicates the proportion of woodworking sector employees in the total national workforce of each Member State. The yellow cells indicate the

subsectors where no trade union is identified in Chapter 2 (see Table 6) as organising employees. Where a significant proportion of the sectoral workforce is employed in an activity, the activity may be an area of focus for future capacity building at national level.

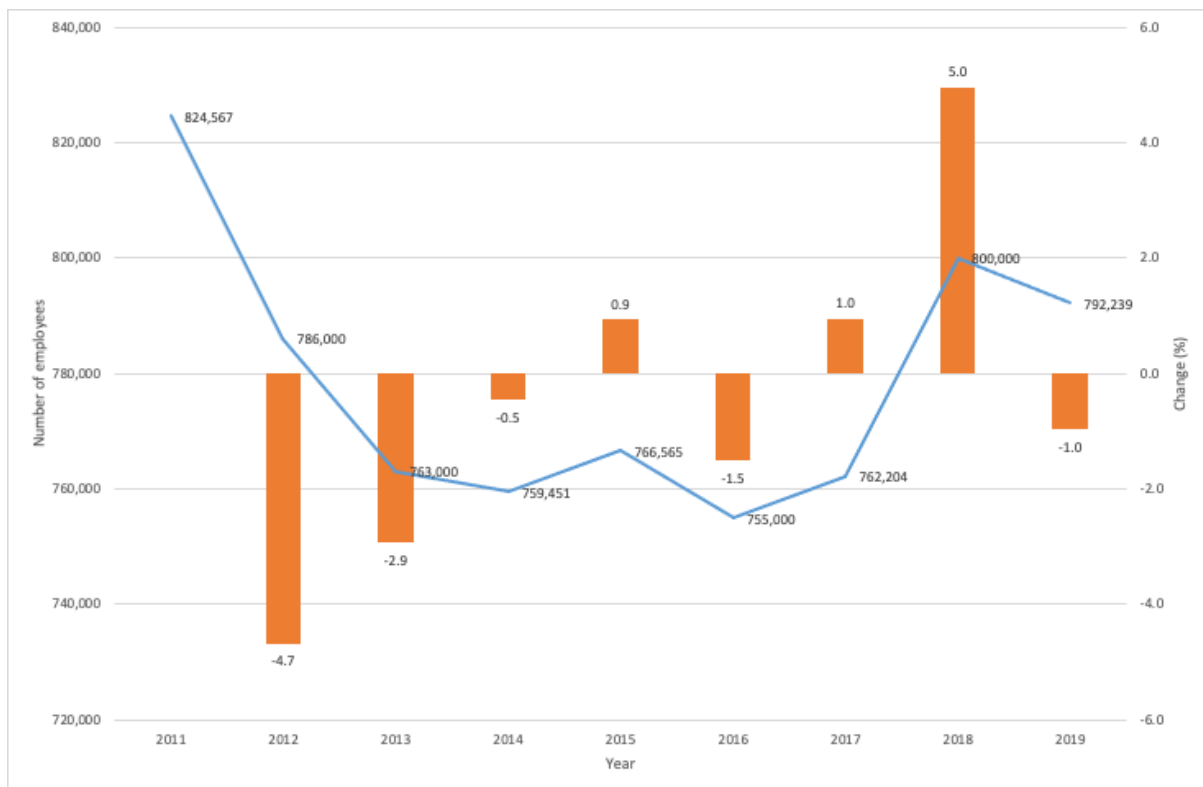
Figure 2: Breakdown of woodworking sector workforce



Source: Eurostat [SBS_NA_IND_R2]

In terms of the sizes of subsectors, 'Manufacture of other builders' carpentry and joinery' (NACE 16.23) is the largest subsector, with 38% of employees in the woodworking sector in the EU27 (see Figure 2). 'Sawmilling and planing of wood' (NACE 16.10) is the second largest subsector, employing 25% of all employees in the woodworking sector. Although the proportions differ, these two subsectors are the largest in the majority of EU Member States.

Figure 3: Number of employees in the woodworking sector in the EU27, 2011–2019

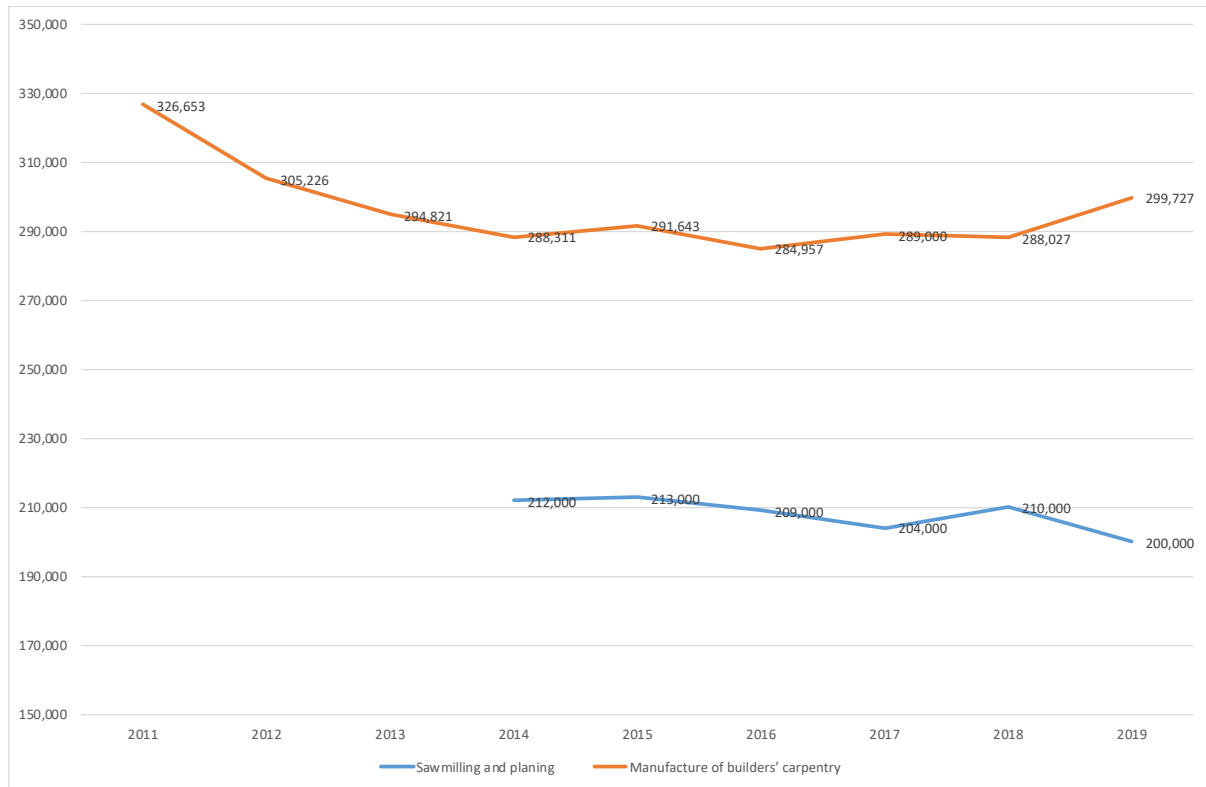


Source: Eurostat [SBS_NA_IND_R2]

Figure 3 shows the number of employees in the woodworking sector from 2011 to 2019 and the percentage change against the previous year. During the period, the number of employees fluctuates, decreasing from 824,567 in 2011 to 755,000 in 2016, and then increasing to 792,239 in 2019. Subsectors of the woodworking sector are hard to analyse because of the confidentiality of data. The subsector ‘Manufacture of other builders’ carpentry and joinery’, the largest contributor to employment in the woodworking sector, follows a similar trend to that for the whole sector: the number of employees was 326,653 in 2011, declining to 284,957 in 2016 and increasing again to 299,727 in 2019. Data for the second largest subsector, ‘Sawmilling and planing of wood’ (NACE 16.10), are available from 2014 onwards. The number of employees declined from 212,000 in 2014 to 200,000 in 2019.

The share of those two subsectors combined in total employment in the woodworking sector declined by 2.8 percentage points, from 65.9% in 2014 to 63.1% in 2019 (Figure 4).

Figure 4: Number of employees in the woodworking sector’s largest subsectors in the EU27, by NACE code, 2011–2019

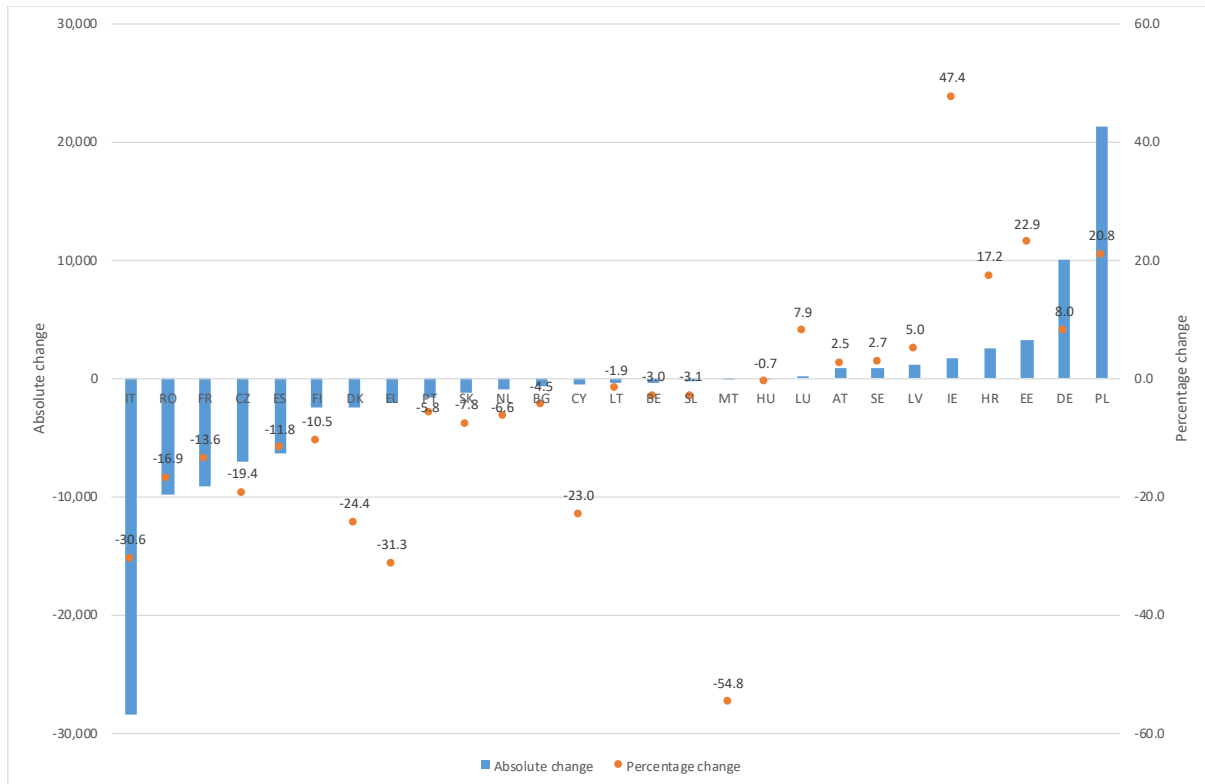


Source: Eurostat [SBS_NA_IND_R2]

Figure 5 demonstrates the changes in the number of employees in the woodworking sector by country between 2011 and 2019, in both absolute and relative terms. In 18 countries, the number of employees declined. In absolute terms, the largest declines were in Italy, by 29,457 employees (30.6%); in Romania, by 9,774 (16.9%); and in France, by 9,097 (13.6%). The largest increases in absolute number of employees were in Poland, by 21,227 employees (20.8%); in Germany, by 10,041 employees (8%); and in Estonia, by 3,223 employees (22.9%).

Representativeness of the European social partner organisations: Woodworking sector

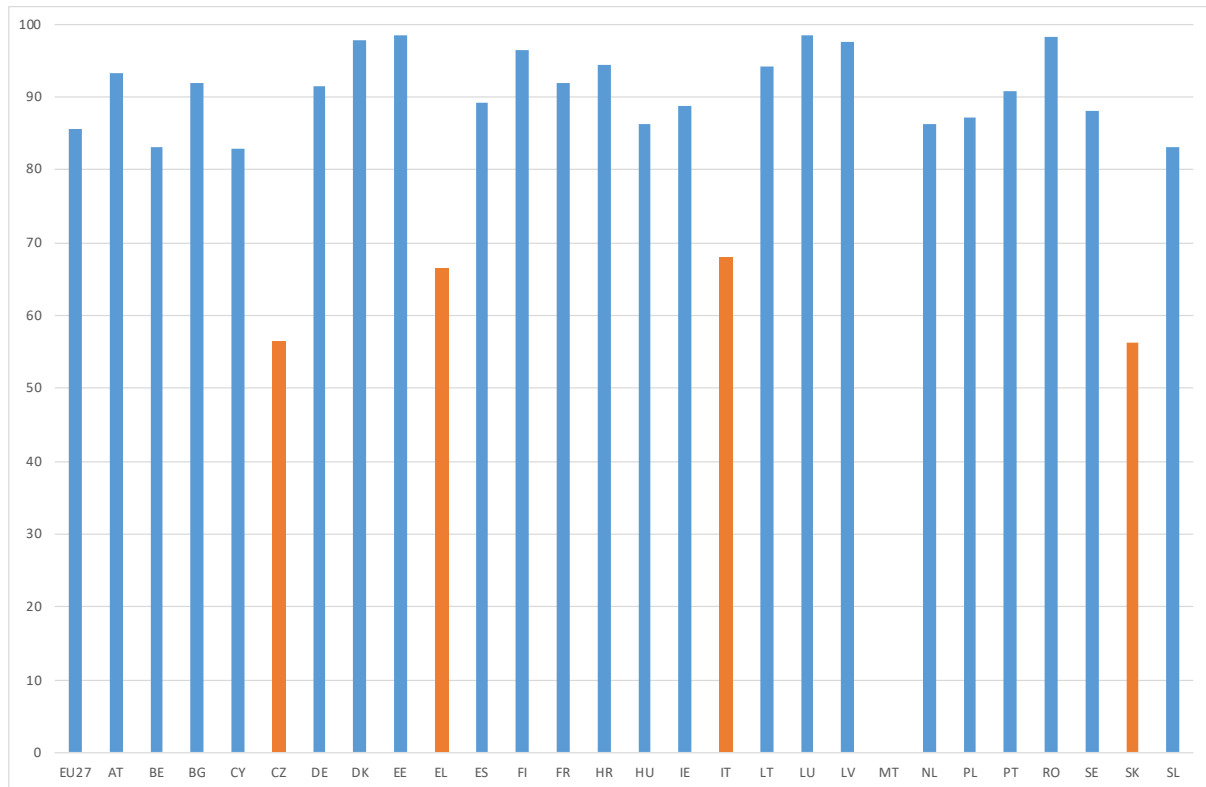
Figure 5: Number of employees in the woodworking sector, 2011–2019



Source: Eurostat [SBS_NA_IND_R2]

Figure 6 illustrates the share of employees in employment, as opposed to self-employed people, in the woodworking sector in particular countries in 2019. Data indicate that in the majority of EU countries the share is above 80%. The lowest shares in employment are in Czechia (56.4%), Slovakia (56.4%), Greece (66.3%) and Italy (67.9%).

Figure 6: Share of employees in employment in the woodworking sector in 2019 (%)



Note: Data for Malta are confidential.

Source: Eurostat [SBS_NA_IND_R2]

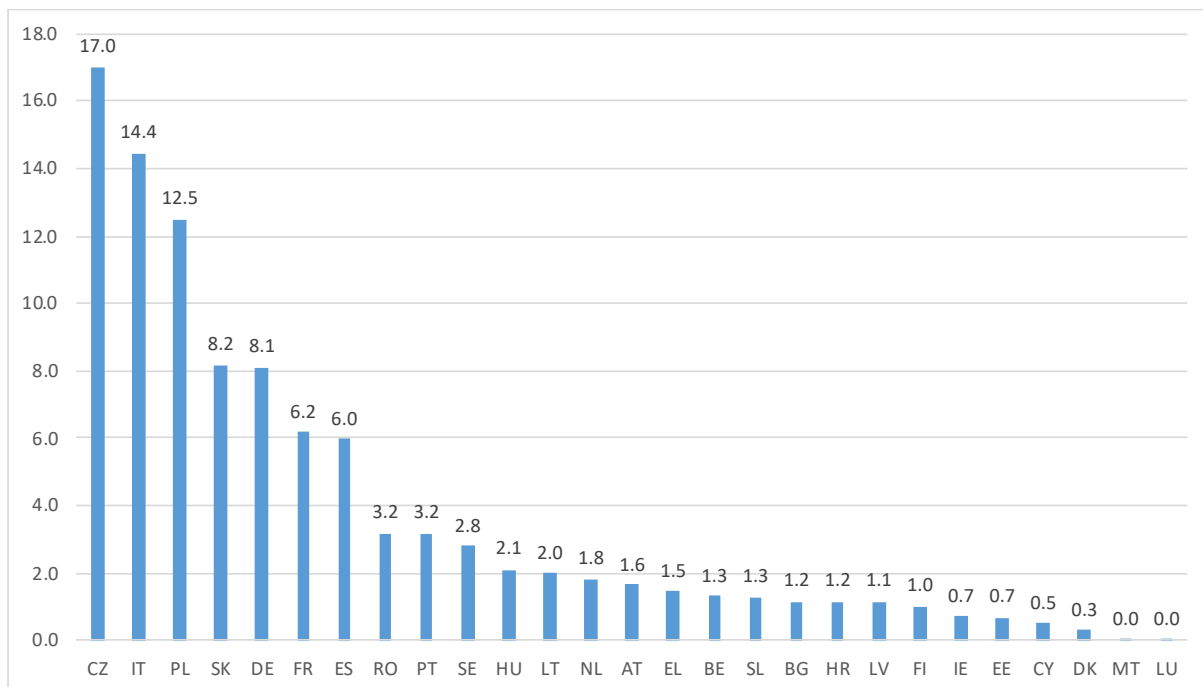
Blue-collar workers (mainly doing manual work) make up the majority of workers in the furniture sector, generally between 60% and 80%.

1.2. Companies in the woodworking sector

According to Eurostat data, the production value of the woodworking industry in the EU was around €126 billion in 2019. The three largest creators of production value were Germany (€26,617 million), Italy (€13,348 million) and France (€11,794 million). In 2019, 159,909 companies were operating in the woodworking sector in the EU. Some 60% of these companies were located in Czechia, Germany, Italy, Poland and Slovakia.

The largest numbers of enterprises across EU27 countries are in Czechia (17% of the total number of enterprises in the woodworking sector), Italy (14%) and Poland (13%) (Figure 7). Germany, one of the largest employers in the woodworking sector, has 12,907 enterprises (8.1%).

Figure 7: Share of enterprises in the woodworking sector, by country, 2018 (%)



Source: Eurostat [SBS_NA_IND_R2]

Annual enterprise statistics by size group give a better understanding of the size of the enterprises (by number of employees) in the woodworking sector. In the EU27, 090.3% of enterprises in the woodworking sector employ 0–9 employees, and 8.1% employ 10–49 employees (Figure 8). The share of very small enterprises (0–9 employees) is low in Bulgaria, Denmark, Estonia, Germany, Latvia and Romania (81% or less), and is high in Cyprus, Czechia, Greece and Slovakia (94% or more) (Table 4).

Representativeness of the European social partner organisations: Woodworking sector

Table 4: Share of enterprises in the woodworking sector, by size group, 2018 (%)

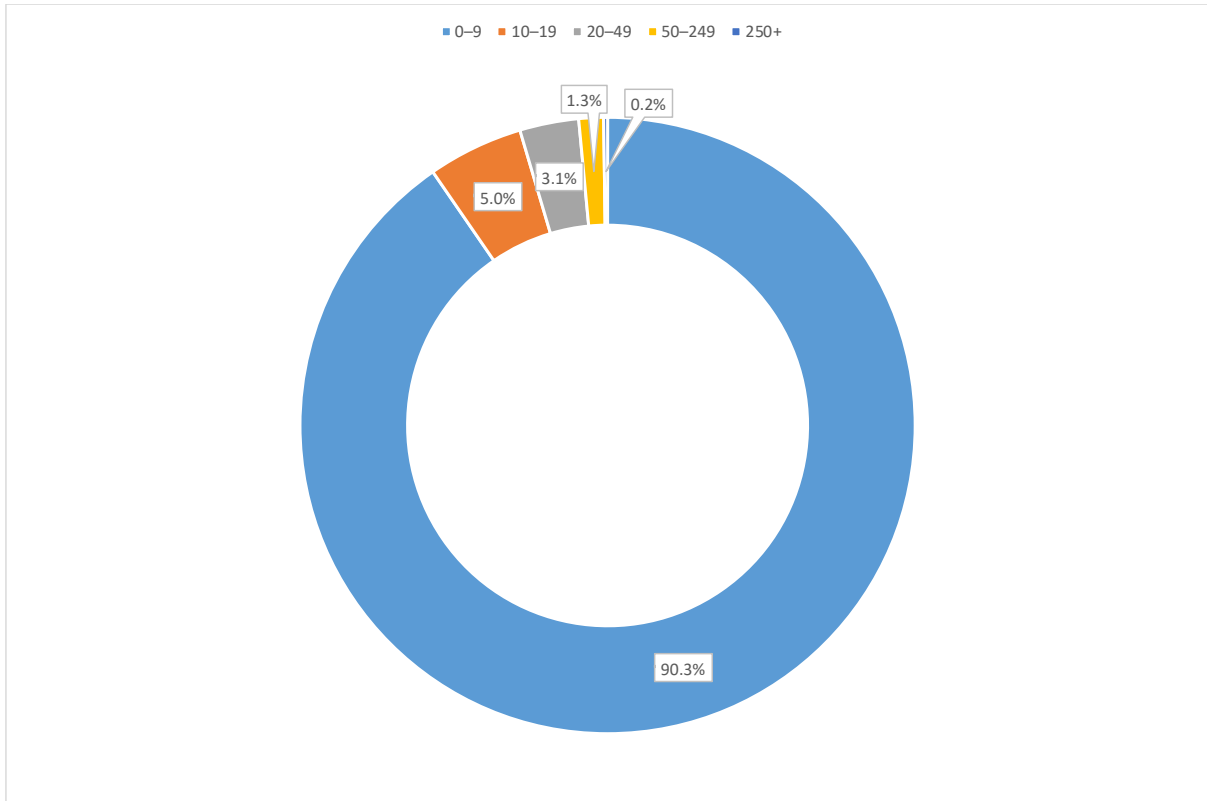
Member State	Proportion of companies in each size group					Proportion of total sectoral workforce in each size group				
	0-9 employees	10-19 employees	20-49 employees	50-249 employees	250+ employees	0-9 employees	10-19 employees	20-49 employees	50-249 employees	250+ employees
EU27	90.3	5.0	3.1	1.3	0.2	29.2	11.9	15.9	21.5	21.2
AT	81.1	8.4	6.7	3.0	0.9	15.2	8.6	15.2	23.4	37.6
BE	90.4	c	4.0	1.5	c	23.8	c	20.1	26.2	c
BG	77.2	12.6	8.4	1.7	0.2	25.3	20.4	29.3	16.8	8.1
CY	95.0	2.8	2.2	0.0	0.0	65.3	12.5	22.2	0.0	0.0
CZ	97.7	1.3	0.7	0.3	0.0	53.4	9.7	10.8	16.5	9.5
DE	81.7	10.2	5.0	2.7	0.5	22.1	12.2	14.0	21.2	30.5
DK	78.6	8.2	7.2	4.6	1.4	11.0	7.2	14.3	33.2	34.3
EE	75.8	9.2	7.7	6.7	0.7	12.1	7.5	14.2	42.5	23.8
EL	94.9	3.3	1.5	0.4	0.0	55.0	15.0	15.0	15.1	0.0
ES	88.8	6.0	4.0	1.2	0.1	33.4	14.6	20.4	19.5	12.1
FI	83.7	6.3	5.5	3.8	0.7	10.3	6.8	12.7	25.1	45.1
FR	88.4	6.0	3.7	1.6	0.3	21.4	12.7	18.5	25.9	21.5
HR	83.3	7.8	5.8	2.8	0.4	20.9	10.4	19.0	29.9	19.8
HU	89.5	6.0	3.3	1.1	0.1	36.6	14.7	19.3	17.6	11.7
IE	89.7	4.9	3.3	2.1	0.0	30.2	11.8	19.0	38.9	0.0
IT	91.6	5.9	1.9	0.6	0.0	50.3	18.9	13.6	12.6	4.6
LT	87.2	5.9	4.4	2.4	0.2	19.2	12.7	21.6	34.0	12.5
LU	47.1	11.8	23.5	11.8	5.9	c	c	18.8	c	c
LV	76.0	9.3	9.9	4.3	0.6	13.4	10.0	23.2	29.6	23.8
MT	96.0	4.0	0.0	0.0	0.0	c	c	c	c	c
NL	90.7	4.4	3.4	1.5	0.0	30.7	c	22.1	31.8	c
PL	89.3	5.3	3.7	1.5	0.2	26.8	10.8	14.8	20.7	26.9
PT	88.8	6.0	3.6	1.3	0.2	31.5	13.8	18.5	20.7	15.5
RO	81.4	9.7	6.3	2.4	0.3	22.5	13.6	19.7	23.7	20.6
SE	91.3	4.3	2.3	1.5	0.6	11.5	7.0	8.7	19.7	53.1
SK	98.3	0.8	0.7	c	c	69.4	5.7	11.7	c	c
SI	91.9	4.4	2.5	1.2	0.0	36.7	13.9	16.9	32.6	0.0

Note: c, confidential.

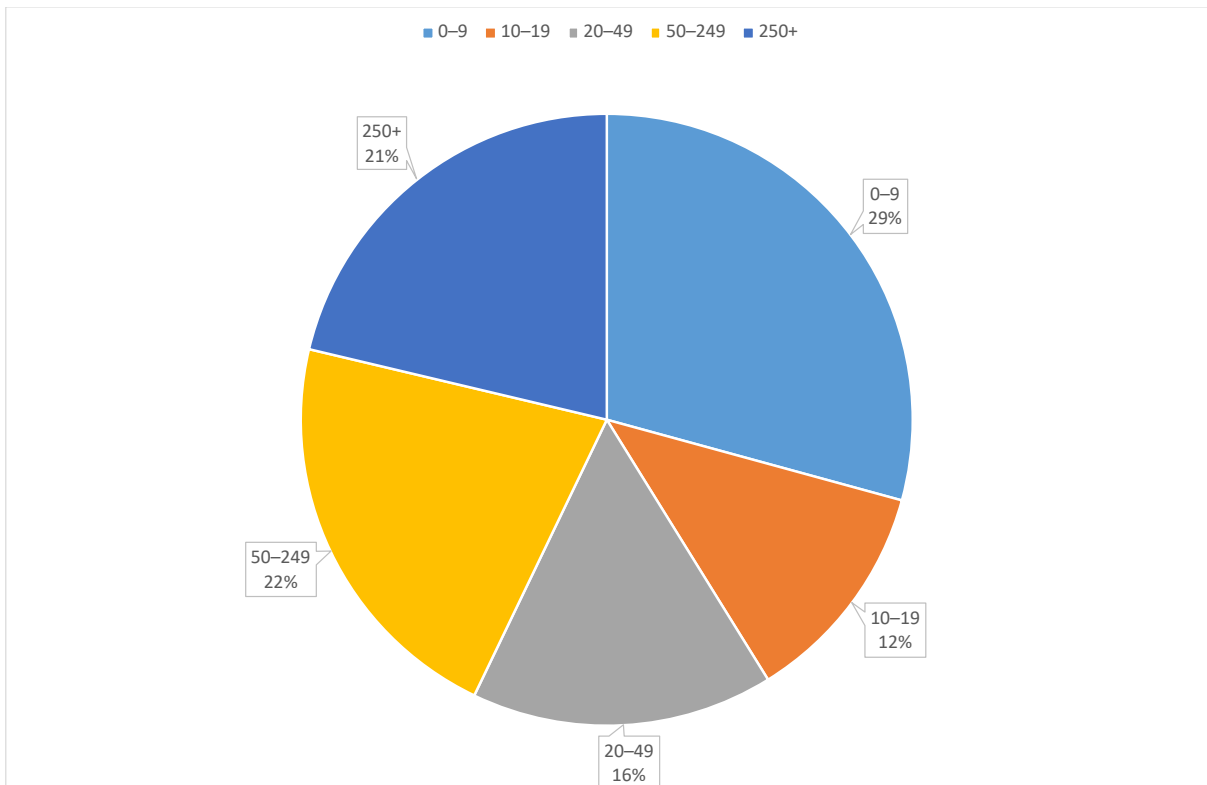
Source: Eurostat [SBS_SC_SCA_R2]

Figure 8: Shares of woodworking companies of different sizes (A) and people employed by woodworking companies of different sizes (B) in the EU27, 2018

(A) Share of enterprises



(B) Share of people employed by enterprises

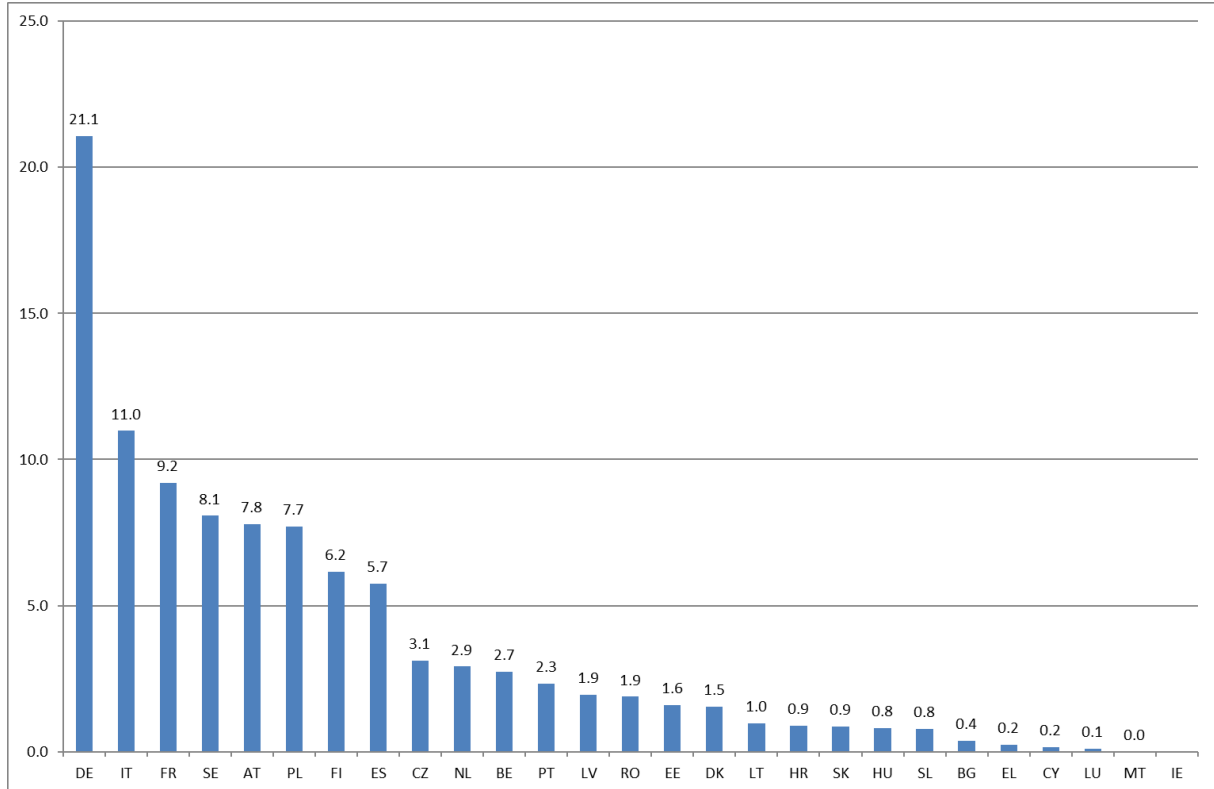


Source: Eurostat [SBS_SC_SCA_R2]

Representativeness of the European social partner organisations: Woodworking sector

Enterprises of the woodworking sector produced €35,000 million value added at factor cost in 2018. Germany provides more than one-fifth of the value added, followed by Italy (11%), France (9.2%), Sweden (8.1%), Austria (7.8%) and Poland (7.7%) (Figure 9). Those six countries provide nearly 65% of the sector's value added, employing a little more than half of the employees in the sector.

Figure 9: Share of value added at factor cost, by country, 2018 (%)



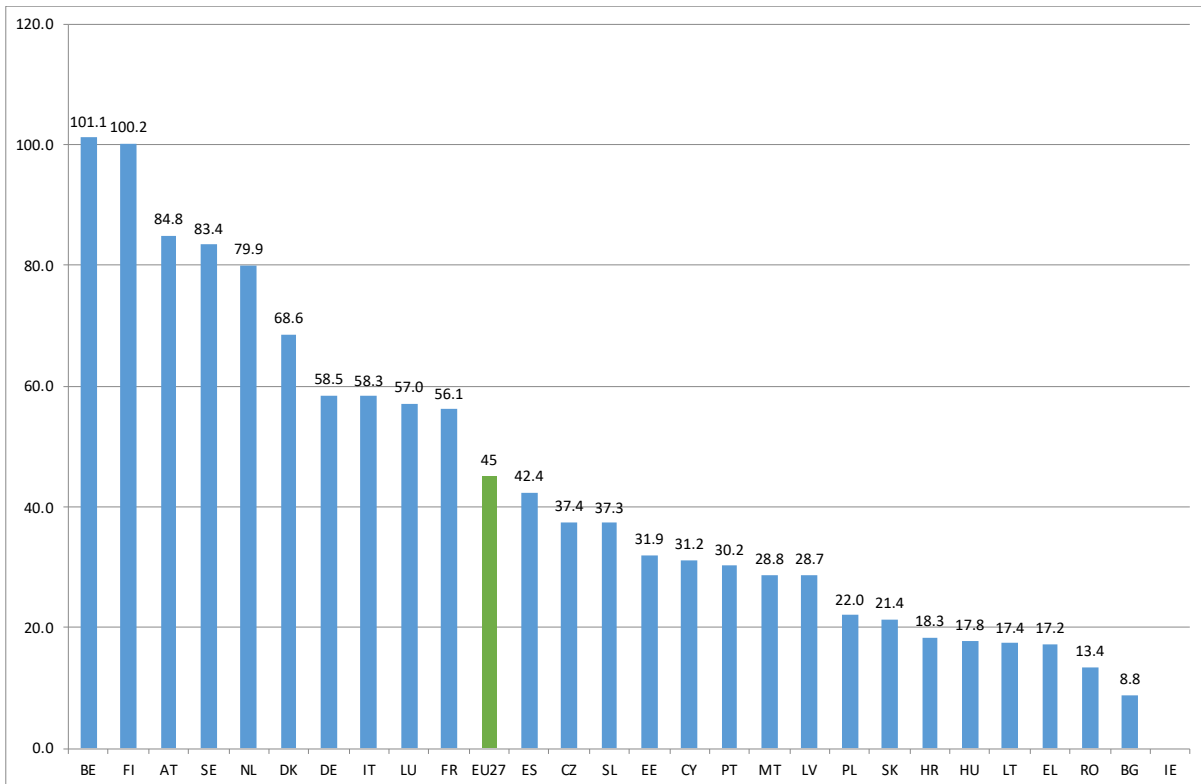
Note: Data for Ireland are confidential.

Source: Eurostat [SBS_NA_IND_R2__custom_754757]

In the EU27, gross value added per employee was, on average, €45,000 in 2018. Belgium, Finland, Austria, Sweden and the Netherlands have the highest gross value added per employee, while Romania and Bulgaria have the lowest (Figure 10). Out of the most significant contributors to the sector's value added, in Austria, Sweden, Germany, Italy and France the gross value added per employee is higher than the EU27 average, while in Poland it is lower.

Representativeness of the European social partner organisations: Woodworking sector

Figure 10: Gross value added per employee, by country, 2018 (thousand EUR)



Note: Data for Ireland are confidential.

Source: Eurostat [SBS_NA_IND_R2__custom_754757]

The number of enterprises in the sector declined from 178,000 in 2011 to 160,000 in 2018. Like the trend in employment data, only some countries saw an increase in the number of enterprises in the sector: Estonia, Latvia, Lithuania, Poland and Slovakia.

2. National level of interest representation

This chapter presents an overview of the 66 national-level trade unions and 73 employer organisations active in the woodworking sector. There is an average of two national trade unions and two national employer organisations per Member State, which is denoted by the blue cells in Table 5. The green cells indicate the number of sectoral trade unions and employer organisations in each Member State.

Table 5: Number of trade unions/employer organisations in the woodworking sector

Number of trade unions								Member State	Number of employer organisations/business associations								
							2	AT	3								
							3	BE	3								
							1	BG	1								
							2	CY	1								
							4	CZ	2								
							1	DE	4								
							2	DK	4								
							1	EE	2								
							1	EL	2								
							3	ES	9								
							4	FI	3								
							5	FR	9								
							2	HR	2								
							4	HU	2								
							3	IE	1								
							3	IT	6								
							2	LT	1								
							2	LU	1								
							1	LV	1								
							0	MT	2								
							2	NL	3								
							3	PL	1								
							6	PT	3								
							2	RO	2								
							4	SE	2								
							2	SI	2								
							1	SK	1								
							66	EU27	73								

Notes: Blue shading denotes the average number of organisations per country, green shading indicates the number of sectoral trade unions and employer organisations in each Member State, and grey shading denotes company-level trade unions. The table includes only the largest trade unions; there could be more in other companies.

Source: Network of Eurofound Correspondents, 2021

In all Member States except Malta, there is at least one trade union in the woodworking sector. Portugal records the highest number of unions in this sector – that is, six. The largest number of employer organisations per country was nine, recorded in France and Spain.

In this chapter, first, all 66 trade unions will be analysed, in three different dimensions. The employer organisations will then be analysed in the same three dimensions. Sector-relatedness is the first dimension, membership strength is the second, and position in the industrial relations landscape and role in shaping working conditions in the sector constitute the third. Sector-relatedness means the extent to which each organisation covers the different parts of the sector, the different types of workers and workers in companies of different sizes. Membership strength refers to the number of employees affiliated to trade unions and the number of companies (and therefore workforces) affiliated to employer organisations. Finally, the role of trade unions and employer organisations in collective bargaining and social dialogue is assessed to determine how much each organisation is involved in shaping the working conditions in the sector.

2.1. Coverage of trade unions in the woodworking sector

Table 6 illustrates the sector-relatedness of each of the 66 national trade unions in the woodworking sector. For Malta, there is no sectoral trade union. The first row of results gives the total number of trade unions for different economic activities, types of worker and company size groups. Below that, the number of Member States in which there is a trade union organising these parts of the sector is given, and further below are the Member States for which no trade unions were found to be organising these parts of the sector. This information can be read together with Tables 3 and 4 in the first chapter. In Table 3, cells are shaded yellow to indicate the parts of the sector that no trade union organises. Although 38% of the sectoral workforce in the EU27 is employed in the production of builders' carpentry, there are six Member States where none of the sectoral trade unions organises that part of the sector. In addition, in more than five Member States, employees in the production of parquet, managerial staff and employees of microfirms are not represented by any sectoral trade union. The green cells in Table 6 indicate the parts of the sector organised by each individual trade union.

Table 6: Breakdown of membership of sectoral trade unions

Member State	Trade union	Affiliation to the EFBWW	Sawmilling and planing	Manufacture of panels	Manufacture of parquet	Manufacture of builders' carpentry	Manufacture of containers	Manufacture of other wood products	Manufacture of engineered wood products (GLULAM)	Type of worker covered			Company size group			
										Blue collar	White collar	Managerial staff	0–9	10–49	50–249	250+
EU27	66	36 (+ 1) ⁵	52	49	38	42	42	45	40	57	55	36	43	48	55	54
Number of Member States	26		25	25	19	20	22	21	20	26	25	18	17	21	24	22
Member States without	Malta has no sectoral trade union. The Member State indicated that it has a		LT	EE	CZ, EE, IE, LT, LU, LV, SK	BG, CZ, EE, HR, HU, IE	BG, EE, LT, SK	CZ, EE, HU, LT, LU	EE, HR, IE, LT, LU, PL		EL	BG, DK, EL, HR, LU, PT, RO, SK	BG, HU, IE, LT, LU, LV,	BG, LT, LU, PL, SK	CY, LU	SI, SK

⁵ 3F is not a direct member, but is affiliated through CO-Industri. 3F represents CO-Industri in the EFBWW.

Representativeness of the European social partner organisations: Woodworking sector

Member State	Trade union	Affiliation to the EFBWW	Sawmilling and planing	Manufacture of panels	Manufacture of parquet	Manufacture of builders' carpentry	Manufacture of containers	Manufacture of other wood products	Manufacture of engineered wood products (GLULAM)	Type of worker covered			Company size group				
										Blue collar	White collar	Managerial staff	0-9	10-49	50-249	250+	
a trade union	sectoral trade union but that it does not currently organise workers in the parts of the sector mentioned.												PL, RO, SK				
AT	GBH																
AT	GPA																
BE	(ACV-CSC) BIE																
BE	(ABVV-FGTB) ACCG																
BE	ACLVB-CGSLB																
BG	BFTOFWPI																
CY	Oikodomoi-PEO																
CY	OOIM-SEK																
CZ	OS DLV																
CZ	ZO Kronospan																
CZ	ZO Pila Paskov																
CZ	ZO Stora Enso Wood Products																
DE	IG Metall																
DK	CO-industri																
DK	3F																
EE	EMTAÜ																
EL	OOSEE																

Representativeness of the European social partner organisations: Woodworking sector

Member State	Trade union	Affiliation to the EFBWW	Sawmilling and planing	Manufacture of panels	Manufacture of parquet	Manufacture of builders' carpentry	Manufacture of containers	Manufacture of other wood products	Manufacture of engineered wood products (GLULAM)	Type of worker covered			Company size group			
										Blue collar	White collar	Managerial staff	0-9	10-49	50-249	250+
ES	UGT – FICA															
ES	CCOO del Hábitat															
ES	ELA-Industria eta Eraikuntza															
FI	YTN															
FI	Pro															
FI	Teollisuusliitto															
FI	Sähköliitto ⁶															
FR	FNCB-CFDT															
FR	FNSCBA-CGT															
FR	FG-FO		n.d.	n.d.	n.d.	n.d.	n.d.	n.d.	n.d.							
FR	FIBOPA CFE-CGC		n.d.	n.d.	n.d.	n.d.	n.d.	n.d.	n.d.							
FR	BATI-MAT-TP CFTC															
HR	SSH															
HR	HRSINDSUM															
HU	MEDOSZ															
HU	EFDSZ															
HU	ÉFÉDOSZSZ															
HU	MOFA															
IE	SIPTU															
IE	Fórsa															

⁶ Information on subsectors covered by this trade union is probably correct, but is based on assumptions.

Representativeness of the European social partner organisations: Woodworking sector

Member State	Trade union	Affiliation to the EFBWW	Sawmilling and planing	Manufacture of panels	Manufacture of parquet	Manufacture of builders' carpentry	Manufacture of containers	Manufacture of other wood products	Manufacture of engineered wood products (GLULAM)	Type of worker covered			Company size group			
										Blue collar	White collar	Managerial staff	0-9	10-49	50-249	250+
IE	Connect															
IT	Fillea – CGIL															
IT	Filca – CISL															
IT	Feneal – UIL															
LT	LBMA DPS															
LT	KAMDS															
LU	Syndicat Bois, Caoutchouc, Céramique, Chimie, Ciment, Papier, Plastique, Textiles et Verre de l'OGB-L												n.d.	n.d.	n.d.	n.d.
LU	LCGB-Indusid												n.d.	n.d.	n.d.	n.d.
LV	LMNA															
MT	None															
NL	CNV Vakmensen															
NL	FNV															
PL	SBiPD NSZZ 'Solidarność'															
PL	ZZ 'Budowlani'															
PL	SBDiOŚ NSZZ 'Solidarność'-80															
PT	Fevicom		n.d.	n.d.	n.d.	n.d.	n.d.	n.d.	n.d.							
PT	Sindeq		n.d.	n.d.	n.d.	n.d.	n.d.	n.d.	n.d.							

Representativeness of the European social partner organisations: Woodworking sector

Member State	Trade union	Affiliation to the EFBWW	Sawmilling and planing	Manufacture of panels	Manufacture of parquet	Manufacture of builders' carpentry	Manufacture of containers	Manufacture of other wood products	Manufacture of engineered wood products (GLULAM)	Type of worker covered			Company size group			
										Blue collar	White collar	Managerial staff	0-9	10-49	50-249	250+
PT	Setaccop		n.d.	n.d.	n.d.	n.d.	n.d.	n.d.	n.d.							
PT	SOCN															
PT	Sindicato dos Operários Corticeiros do Distrito de Portalegre															
PT	SINDCES															
RO	FSLIL															
RO	Forestar Tarcău															
SE	GS															
SE	Unionen															
SE	Ledarna															
SE	Sveriges Ingenjörer															
SI	SLGS (Sinles)															
SI	KNSS Independence															
SK	OZ DLV															

Notes: Orange shading denotes membership of the EFBWW (yellow indicates indirect membership), green shading indicates that the part of the sector is organised and grey shading denotes company-level trade unions. GLULAM, glued laminated timber; n.d., no data.

Source: Network of Eurofound Correspondents, 2021

2.2. Membership strength and organisational density of trade unions

The grey column in the middle of Table 7 gives the number of workers in the sector affiliated to the trade unions, indicating the union's membership strength. For 20 trade unions, an exact number is given, while for 23 an estimate is provided because the trade union also covers other sectors and the members are therefore not linked to specific sectors in the membership database. For 10 trade unions, an estimate is given because an exact number was not disclosed. The far-right column indicates whether membership is increasing, decreasing or stable. The rankings of membership strength indicate the groups of trade unions with the most members in the sector, those with the second most and those with the third most. The 36 trade unions directly affiliated to the EFBWW are marked in orange; 3F in Denmark is indirectly affiliated and is marked in yellow.

Table 7: Membership strength of woodworking sector trade unions

Member State	Trade union	Ranking in terms of membership strength	Affiliation to the EFBWW	Members in the woodworking sector	Exact number	Estimate because data are not linked to the sector	Estimate because exact number is not disclosed	Membership trend
EU27	66		36 (+ 1)	Around 135,881 in 56 unions	20	23	10	Stable = 22 Decreasing = 21 Increasing = 5 Stable or decreasing = 2 Decreasing then increasing = 1 n.d. = 15
AT	GBH	1		Around 60%		x		Stable
AT	GPA	2		30%		x		Stable
BE	(ACV-CSC) BIE	1		60.06%	x			Stable
BE	(ABVV-FGTB) ACCG	2		5,665 ⁷	x			n.d.
BE	ACLVB-CGSLB	3		831 ⁸	x			n.d.
BG	BFTOFWPI	1		10%		x		Decreasing
CY	Oikodomoi-PEO	1		155		x		Decreasing
CY	OOIM-SEK	2		152		x		Decreasing
CZ	OS DLV	1		594	x			Decreasing
CZ	ZO Kronospan			343				n.d.
CZ	ZO Pila Paskov			340				n.d.
CZ	ZO Stora Enso Wood Products			350				n.d.
DE	IG Metall	1		15,000	x			Stable
DK	CO-industri	1		2,550		x		Stable

⁷ Membership data include the furniture sector.

⁸ Membership data include the furniture sector.

Representativeness of the European social partner organisations: Woodworking sector

Member State	Trade union	Ranking in terms of membership strength	Affiliation to the EFBWW	Members in the woodworking sector	Exact number	Estimate because data are not linked to the sector	Estimate because exact number is not disclosed	Membership trend
DK	3F	⁹		2,550 ¹⁰		x		Stable
EE	EMTAÜ	1		n.d.	n.d.	n.d.	n.d.	Decreasing
EL	OOSEE	1		1,075 ¹¹	x			Stable
ES	UGT – FICA	2		n.d.	n.d.	n.d.	n.d.	Stable
ES	CCOO del Hábitat	1		4,137	x			Increasing
ES	ELA-Industria eta Eraikuntza	1 ¹²		n.d.	n.d.	n.d.	n.d.	Increasing
FI	YTN	3		Around 1,000 ¹³	n.d.	n.d.	n.d.	n.d.
FI	Pro	2		850		x		Decreasing
FI	Teollisuusliitto	1		10,000		x		Decreasing
FI	Sähköliitto	n.d.		250				n.d.
FR	FNCB-CFDT	1		872	x			Decreasing
FR	FNSCBA-CGT	2		< 1,000 ¹⁴	x			Stable
FR	FG-FO	3		< 500 ¹⁵			x	Stable or decreasing ¹⁶
FR	FIBOPA CFE-CGC	5		< 100 ¹⁷			x	Stable or decreasing ¹⁸
FR	BATI-MAT-TP CFTC	4		< 100 ¹⁹			x	Decreasing
HR	SSH	1 ²⁰		100	x			Decreasing
HR	HRSINDSUM	1 ²¹		6,200	x			Decreasing
HU	MEDOSZ	1		500	x			Decreasing
HU	EFDSZ	2		110	x			Decreasing

⁹ Member of the organisation CO-industri, which is the largest trade union association in this study. 3F is the largest standalone trade union in the woodworking sector and in Denmark overall.

¹⁰ This estimate at first seemed to be very low, as 3F is the largest sectoral trade union and the number of sectoral employees, obtained from Statistics Denmark, is 8,537. After we asked 3F for clarification on this, it commented that (1) the number is an estimate and may be too low, as there may be errors in 3F's membership coding system; and (2) data from Statistics Denmark may draw on broader definitions of the sectors than the NACE code system, including (a) types of workers covered by collective agreements from other unions, such as office workers, and/or (b) types of workers covered by other 3F agreements, such as warehouse workers. Therefore, it makes sense that the sector seems bigger when the estimate is based on the data of Statistics Denmark than when it is based on 3F's data.

¹¹ Membership data include the furniture sector.

¹² The largest trade union in the Basque Country.

¹³ Through YTN-affiliated trade unions.

¹⁴ Estimate by national correspondent. Information was not provided by the trade union.

¹⁵ Estimate by national correspondent. Information was not provided by the trade union.

¹⁶ Estimate by national correspondent. Information was not provided by the trade union.

¹⁷ Estimate by national correspondent. Information was not provided by the trade union.

¹⁸ Estimate by national correspondent. Information was not provided by the trade union.

¹⁹ Estimate by national correspondent. Information was not provided by the trade union.

²⁰ The only trade union in the private sector.

²¹ The only trade union in the public sector.

Representativeness of the European social partner organisations: Woodworking sector

Member State	Trade union	Ranking in terms of membership strength	Affiliation to the EFBWW	Members in the woodworking sector	Exact number	Estimate because data are not linked to the sector	Estimate because exact number is not disclosed	Membership trend
HU	ÉFÉDOSZSZ	3		93	x			Decreasing
HU	MOFA			24	x			Decreasing
IE	SIPTU	1 ²²		1,000			x	n.d.
IE	Fórsa	2/3		300			x	Stable ²³
IE	Connect	2/3		500			x	Stable ²⁴
IT	Fillea – CGIL	1		n.d.	n.d.	n.d.	n.d.	Stable
IT	Filca – CISL	2		n.d.	n.d.	n.d.	n.d.	Stable
IT	Feneal – UIL	3		n.d.	n.d.	n.d.	n.d.	Stable
LT	LBMAJDPS	1		120		x		Decreasing
LT	KAMDS	2 ²⁵		n.d.	n.d.	n.d.	n.d.	n.d.
LU	Syndicat Bois, Caoutchouc, Céramique, Chimie, Ciment, Papier, Plastique, Textiles et Verre de l'OGB-L	1		n.d.	n.d.	n.d.	n.d.	Increasing
LU	LCGB-Indusid	2		n.d.	n.d.	n.d.	n.d.	Stable
LV	LMNA	1		2,719	x			Stable
MT	None							
NL	CNV Vakmensen	2		About 3%		x		Stable
NL	FNV	1		About 9%	n.d.	n.d.	n.d.	Decreasing
PL	SBiPD NSZZ 'Solidarność'	1		1,778	x			Decreasing then increasing ²⁶
PL	ZZ 'Budowlani'	2		> 1,150 ²⁷		x		Slightly increasing
PL	SBDiOŚ NSZZ 'Solidarność'-80	3		About 300		x		Stable
PT	Feviccom	1		About 1,500 ²⁸		x		n.d.
PT	Sindeq	3		About 500 ²⁹		x		n.d.
PT	Setaccop	4		About 150 ³⁰		x		n.d.
PT	SOCN	2		About 950		x		n.d.
PT	Sindicato dos Operários Corticeiros do Distrito de Portalegre	Small		About 50		x		n.d.
PT	SINDCES	Small		About 10		x		n.d.

²² Information is probably correct, but is based on assumptions.

²³ Information is probably correct, but is based on assumptions.

²⁴ Information is probably correct, but is based on assumptions.

²⁵ Information is probably correct, but is based on assumptions.

²⁶ NACE 16.10, 16.23 and 16.29 membership decreased at the beginning of the period analysed, but recently there has been an increase in membership. NACE 16.21 membership remained stable.

²⁷ When the furniture sector is included, there are 2,300 members. The interviewee indicated that more than half of the members are from the woodworking sector.

²⁸ Estimate of a national correspondent.

²⁹ Estimate of a national correspondent.

³⁰ Estimate of a national correspondent.

Representativeness of the European social partner organisations: Woodworking sector

Member State	Trade union	Ranking in terms of membership strength	Affiliation to the EFBWW	Members in the woodworking sector	Exact number	Estimate because data are not linked to the sector	Estimate because exact number is not disclosed	Membership trend
RO	FSLIL	1		1,930	x			Decreasing ³¹
RO	Forestar Tarcău			0.20%	x			Stable
SE	GS	1		24,000 ³²		x		Decreasing
SE	Unionen	2		3,020	x			Stable
SE	Ledarna	n.d.		2,300		x		Decreasing
SE	Sveriges Ingenjörer	n.d.		274			x	Increasing
SI	SLGS (Sinles)	1		30%		x	x	Stable
SI	KNSS Independence	2		10%		x	x	Stable
SK	OZ DLV	1		600–800			x	Decreasing

Note: Orange shading denotes membership of the EFBWW (yellow indicates indirect membership); dark grey shading denotes company-level trade unions. n.d., no data.

Source: Network of Eurofound Correspondents, 2021

Table 8 lists the membership strength of the trade unions in the woodworking sector that do not cover the entire country.

Table 8: Membership strength of trade unions not covering entire countries

Member State	Trade union	Affiliation to the EFBWW	Members in the woodworking sector	Exact number	Estimate A	Estimate B	Estimate C	Membership trend
CZ	ZO Kronospan		343	n.d.	n.d.	n.d.	n.d.	n.d.
CZ	ZO Pila Paskov		340	n.d.	n.d.	n.d.	n.d.	n.d.
CZ	ZO Stora Enso Wood Products		350	n.d.	n.d.	n.d.	n.d.	n.d.
ES	ELA-Industria eta Eraikuntza		n.d.	n.d.	n.d.	n.d.	n.d.	Increasing
HU	MEDOSZ		500	x				Decreasing
HU	ÉFÉDOSZSZ		93	x				Decreasing
HU	MOFA		24	x				Decreasing
IE	Fórsa		300				x	Stable
IE	Connect		500				x	Stable
LT	KAMDS		n.d.	n.d.	n.d.	n.d.	n.d.	n.d.
PT	SOCN		Approximately 950		x			
PT	Sindicato dos Operários Corticeiros do Distrito de Portalegre		Approximately 50		x			
RO	Forestar Tarcău		0.20%	x				Stable

Notes: Orange shading denotes membership of the EFBWW and grey shading denotes company-level trade unions. n.d., no data. Estimate A, the figure is an estimate because the membership database of the trade

³¹ Membership has decreased dramatically in the past 20 years. Many trade union members in former (state-owned) forestry enterprises have become insolvent or bankrupt.

³² Membership data include the furniture sector; approximately 70% of members are in the woodworking sector.

Representativeness of the European social partner organisations: Woodworking sector

union does not cover only the woodworking sector, the members are not linked to specific sectors or a system other than NACE is used for sector delimitation; estimate B, the figure is an estimate because the membership databases are kept at regional level; estimate C, the figure is an estimate because the trade union does not want to disclose the exact number.

Source: Network of Eurofound Correspondents, 2021

2.3. Status of trade unions and their involvement in collective bargaining and social dialogue

In Table 9, each trade union's place in the sectoral industrial relations landscape is described. From left to right, the table outlines their involvement in collective bargaining, their recognition as representative trade unions for the sector, their link with employee representatives in the workplace and their involvement in social dialogue, in paritarian organisations and in government consultations. With regard to trade unions' involvement in collective bargaining, the table indicates whether they are involved in multi-employer bargaining (MEB) at sector level or single-employer bargaining (SEB) at company level, and the proportion of the workforce covered by collective bargaining. A total of 41 trade unions are involved in MEB, 48 are involved in SEB and 27 are involved in both MEB and SEB. The column shaded in grey indicates that 57 trade unions are considered representative of the sector. For 30 of them, this is based on mutual recognition, for 19 it is based on the fulfilment of legal requirements, and for 7 it is based on a combination of mutual recognition and fulfilling legal requirements. On the right of the grey column, countries where there are elected workplace representatives and the proportion of them that are members of the trade union are identified. Of the 66 sectoral trade unions, 30 are involved in sectoral social dialogue structures, 21 participate in paritarian organisations and 35 are consulted by their governments on sector-related matters. In Table 10, the coverage of collective bargaining is described in detail for the different parts of the sector.

Representativeness of the European social partner organisations: Woodworking sector

Table 9: Status of woodworking sector trade unions

Member State	Trade union	Affiliation to the EFBWW	MEB	SEB	Proportion of the national sectoral workforce covered by the collective bargaining for the sector in which the trade union is involved	Is the trade union recognised as a representative trade union for the woodworking sector?	Method of recognition	Are there elected employee representatives in the country?	Proportion of representatives in the trade union	Is the trade union involved in bipartite or tripartite social dialogue related to the woodworking sector?	Is the trade union involved in paritarian organisations?	Type of consultation with government
EU27	66	36 (+ 1)	Yes = 41 No = 25	Yes = 48 No = 18		Yes = 57 No = 8 n.d. = 1	LR and MR = 7 LR = 19 MR = 28 None = 8 n.d. = 1 Legal criteria = 3	Yes = 47 No = 11 n.d. = 8		Yes = 30 No = 30 n.d. = 6	Yes = 21 No = 35 n.d. = 10	Ad hoc = 26 Regular = 9 None = 27 n.d. = 3
AT	GBH				75% ³³	Yes	LR and MR	Yes	33% ³⁴	Yes	No	Ad hoc
AT	GPA				Around 25%	Yes	LR and MR	Yes	n.d. ³⁵	Yes	No	None
BE	(ACV-CSC) BIE				100%	Yes	LR and MR	Yes	60%	Yes	Yes	Regular
BE	(ABVV-FGTB) ACCG				n.d.	Yes	LR and MR	Yes	n.d.	Yes	Yes	Regular
BE	ACLVB-CGSLB				100%	Yes	LR and MR	Yes	n.d.	Yes	Yes	Regular

³³ Among blue-collar workers, coverage through collective agreements is 100%. Considering that blue-collar workers are 75% of the national sectoral workforce, the collective agreements concluded by this union cover 75% of the sectoral workforce.

³⁴ Within the GBH, there are approximately 2,500 works council representatives, of whom around a third (800–900) belong to the woodworking and furniture sectors

³⁵ The GPA represents only 25% of the sectoral workforce, and around 30% of sectoral organisations. It can be assumed that only a few hundred white-collar works council representatives are active in the sector.

Representativeness of the European social partner organisations: Woodworking sector

Member State	Trade union	Affiliation to the EFBWW	MEB	SEB	Proportion of the national sectoral workforce covered by the collective bargaining for the sector in which the trade union is involved	Is the trade union recognised as a representative trade union for the woodworking sector?	Method of recognition	Are there elected employee representatives in the country?	Proportion of representatives in the trade union	Is the trade union involved in bipartite or tripartite social dialogue related to the woodworking sector?	Is the trade union involved in paritarian organisations?	Type of consultation with government
BG	BFTOFWPI				10%	Yes	LR and MR	No	n.a	Yes	No	None
CY	Oikodomoi-PEO				42% ³⁶	Yes	MR	Yes	n.d. ³⁷	No	Yes	None
CY	OOIM-SEK				42% ³⁸	Yes	MR	Yes	1 in 30 ³⁹	No	Yes	Ad hoc
CZ	OS DLV				2,190 employees	No	None	No	n.a.	Yes	No	Ad hoc
CZ	ZO Kronospan				343 employees (approximately 1%)	No	None	No	n.a.	Yes	No	None
CZ	ZO Pila Paskov				340 employees (about 1%)	No	None	No	n.a.	Yes	No	None
CZ	ZO Stora Enso Wood Products				350 employees (about 1%)	No	None	No	n.a.	No	No	None
DE	IG Metall				n.d.	Yes	MR	Yes	80%	No	No	Ad hoc
DK	CO-industri				80% ⁴⁰	Yes	MR	Yes	n.d.	Yes	Yes	Ad hoc

³⁶ A multi-employer sectoral collective bargaining agreement was signed by the two largest trade unions in the sector and by the largest employer organisation in the sector. The workforce of the member companies of the employer organisation amounts to around 42% of the entire workforce in the woodworking sector.

³⁷ The representatives and their share in the unionised workforce are determined on an ad hoc basis.

³⁸ A multi-employer sectoral collective bargaining agreement was signed by the two largest trade unions in the sector and by the largest employer organisation in the sector. The workforce of the member companies of the employer organisation amounts to around 42% of the entire workforce in the woodworking sector.

³⁹ There is 1 representative for every 30 employees.

⁴⁰ This number is based on the collective agreement for the woodworking and furniture sectors (*Træ- og Møbeloverenskomsten*) signed by 3F and DI, which covers the workforce in production. The number does not take into account the rest of the workforce, such as office workers and management. Office/white-collar workers are probably covered by the Collective Agreement for Salaried Employees in Industry (signed by CO-industri and Dansk Industri), reached through multisectoral bargaining. Management staff are usually not covered by sectoral bargaining and self-employed people are not covered. Therefore, 80% could be a very good estimate, as CO-industri

Representativeness of the European social partner organisations: Woodworking sector

Member State	Trade union	Affiliation to the EFBWW	MEB	SEB	Proportion of the national sectoral workforce covered by the collective bargaining for the sector in which the trade union is involved	Is the trade union recognised as a representative trade union for the woodworking sector?	Method of recognition	Are there elected employee representatives in the country?	Proportion of representatives in the trade union	Is the trade union involved in bipartite or tripartite social dialogue related to the woodworking sector?	Is the trade union involved in paritarian organisations?	Type of consultation with government
DK	3F				50%	Yes	MR	Yes	n.d.	Yes	Yes	Ad hoc
EE	EMTAÜ			⁴¹	0%	No	None	Yes	12 ⁴²	Yes ⁴³	No	None
EL	OOSEE				0%	Yes	LR and MR	No ⁴⁴	n.a.	No	No	None
ES	UGT – FICA				80–90%	Yes	LR	Yes	40–45%	No	No	None
ES	CCOO del Hábitat				100%	Yes	LR	Yes	46%	No	No	None
ES	ELA-Industria eta Eraikuntza				15–20%	Yes ⁴⁵	LR	Yes	50–55% ⁴⁶	No	No	None
FI	YTN					Yes	MR	n.d.	n.d.	No	No	n.d.
FI	Pro				Around 5%	Yes	MR	Yes	n.d.	Yes	n.d.	Ad hoc
FI	Teollisuusliitto				Around 50%	Yes	MR	Yes	n.d.	Yes	No	Ad hoc
FI	Sähköliitto			⁴⁷	Around 1.3%	n.d.	n.d.	n.d.	n.d.	n.d.	n.d.	n.d.
FR	FNCB-CFDT				100%	Yes	LR	Yes	n.d.	Yes	Yes	Ad hoc
FR	FNSCBA-CGT				100%	Yes	LR	Yes	n.d.	Yes	Yes	Regular
FR	FG-FO				100%	Yes	LR	Yes	n.d.	Yes	Yes	n.d.

is directly involved in one agreement and is affiliated with the other through 3F. It is important to keep in mind that these estimates are for the woodworking and furniture sectors combined.

⁴¹ However, no agreements are in force and no negotiations are ongoing at the moment.

⁴² There may be more than one representative per company.

⁴³ There seems to be one organisation in which the trade union participates, though perhaps not directly dealing with working conditions. The trade union did not mention it itself, saying that it is not involved in social dialogue bodies.

⁴⁴ There are no employee representatives outside the unions. Employee representatives are only legally recognised if they are elected members of the primary unions who also participate in the congress of the federation.

⁴⁵ At regional level in the Basque Country and Navarre.

⁴⁶ At regional level in the Basque Country and Navarre.

⁴⁷ Information is probably correct, but is based on assumptions.

Representativeness of the European social partner organisations: Woodworking sector

Member State	Trade union	Affiliation to the EFBWW	MEB	SEB	Proportion of the national sectoral workforce covered by the collective bargaining for the sector in which the trade union is involved	Is the trade union recognised as a representative trade union for the woodworking sector?	Method of recognition	Are there elected employee representatives in the country?	Proportion of representatives in the trade union	Is the trade union involved in bipartite or tripartite social dialogue related to the woodworking sector?	Is the trade union involved in paritarian organisations?	Type of consultation with government
FR	FIBOPA CFE-CGC				60–80%	Yes	LR	Yes	n.d.	Yes	Yes	None
FR	BATI-MAT-TP CFTC				60–80%	Yes	LR	Yes	n.d.	Yes	Yes	None
HR	SSH					Yes	LR	Yes	30%	No	No	None
HR	HRSINDSUM				47%	Yes	LR	Yes	30%	No	No	None
HU	MEDOSZ				800–1,000 employees	No	None	Yes	4–5 companies	No	Yes	None
HU	EFDSZ				32% ⁴⁸	Yes	LR	Yes	n.d.	Yes	Yes	None
HU	ÉFÉDOSZSZ				0.05%	No	None	Yes	n.d.	No	No	None
HU	MOFA				234 employees	Yes	LR	No	n.a.	No ⁴⁹	No ⁵⁰	None
IE	SIPTU				< 10%	Yes	MR	n.d.	n.d.	No	No	None
IE	Fórsa				< 5%	Yes	MR	n.d.	n.d.	No	No	None
IE	Connect				< 5%	Yes	MR	n.d.	n.d.	No	No	None
IT	Fillea – CGIL				n.d.	Yes	MR	Yes	n.d.	Yes	Yes	Ad hoc
IT	Filca – CISL				n.d.	Yes	MR	Yes	n.d.	Yes	Yes	Ad hoc
IT	Feneal – UIL				n.d.	Yes	MR	Yes	n.d.	Yes	Yes	Ad hoc
LT	LBMAJDPS				≥ 4.5%	Yes	MR	n.d.	n.d.	No	No	None
LT	KAMDS				2%	Yes	MR	n.d.	n.d.	No	No	n.d.
LU	Syndicat Bois, Caoutchouc, Céramique, Chimie, Ciment, Papier, Plastique, Textiles et Verre de l'OGB-L				90–95%	Yes	LR	Yes	n.d.	No	No	None
LU	LCGB-Indusid				90–95%	Yes	LR	Yes	n.d.	No	No	None
LV	LMNA				11%	Yes	LR	Yes	n.d.	Yes	Yes	Regular
MT						None						

⁴⁸ Only state-owned company employees are covered.

⁴⁹ Trade union has an umbrella organisation, the Wood Industry Federation of Workers' Councils, that participates in some dialogue.

⁵⁰ Trade union has an umbrella organisation, the Wood Industry Federation of Workers' Councils, that participates in some dialogue.

Representativeness of the European social partner organisations: Woodworking sector

Member State	Trade union	Affiliation to the EFBWW	MEB	SEB	Proportion of the national sectoral workforce covered by the collective bargaining for the sector in which the trade union is involved	Is the trade union recognised as a representative trade union for the woodworking sector?	Method of recognition	Are there elected employee representatives in the country?	Proportion of representatives in the trade union	Is the trade union involved in bipartite or tripartite social dialogue related to the woodworking sector?	Is the trade union involved in paritarian organisations?	Type of consultation with government
NL	CNV Vakmensen				Close to 100%	Yes	MR	Yes	n.d.	Yes	Yes	Ad hoc
NL	FNV				Around 55%	Yes	MR	Yes	n.d.	Yes	Yes	Ad hoc
PL	SBiPD NSZZ 'Solidarność'				Around 1.8%	Yes	Legal criteria	Yes	n.d.	No	No	Ad hoc
PL	ZZ 'Budowlani'				Around 1%	Yes	Legal criteria	Yes	n.d.	No	No	Ad hoc
PL	SBDiOŚ NSZZ 'Solidarność' - 80				n.a.	Yes	Legal criteria	Yes	n.d.	No	No	Ad hoc
PT	Feviccom				About 26%	Yes	MR	Yes	n.d.	n.d.	n.d.	None
PT	Sindeq				About 62%	Yes	MR	Yes	0	n.d.	n.d.	Ad hoc ⁵¹
PT	Setaccop				About 62%	Yes	MR	Yes	0	No	No	Ad hoc ⁵²
PT	SOCN				About 3%	Yes	MR	Yes	n.d.	n.d.	n.d.	Ad hoc ⁵³
PT	Sindicato dos Operários Corticeiros do Distrito de Portalegre				About 3%	Yes	MR	Yes	n.d.	n.d.	n.d.	Ad hoc
PT	SINDCES				About 2%	Yes	MR	Yes	n.d.	n.d.	n.d.	Ad hoc ⁵⁴
RO	FSLIL			⁵⁵	About 7%	Yes	LR	n.d.	15 ⁵⁶	Yes	Yes	Ad hoc
RO	Forestar Tarcău				0.20%	No ⁵⁷	None	Yes	n.d.	No	No	None
SE	GS				90%	Yes	MR	No	n.a.	No	No	Regular

⁵¹ Information is probably correct, but is based on assumptions.

⁵² Information is probably correct, but is based on assumptions.

⁵³ Information is probably correct, but is based on assumptions.

⁵⁴ Information is probably correct, but is based on assumptions.

⁵⁵ Through its member trade unions (established at company level). FSLIL offers support and assistance when needed.

⁵⁶ In the federation, three individual members are employee representatives for each of the five trade union members. Therefore, there are 15 elected employee representatives.

⁵⁷ It is representative at company level.

Representativeness of the European social partner organisations: Woodworking sector

Member State	Trade union	Affiliation to the EFBWW	MEB	SEB	Proportion of the national sectoral workforce covered by the collective bargaining for the sector in which the trade union is involved	Is the trade union recognised as a representative trade union for the woodworking sector?	Method of recognition	Are there elected employee representatives in the country?	Proportion of representatives in the trade union	Is the trade union involved in bipartite or tripartite social dialogue related to the woodworking sector?	Is the trade union involved in paritarian organisations?	Type of consultation with government
SE	Unionen				90%	Yes	MR	No	n.a.	No	No	Ad hoc
SE	Ledarna				100%	Yes	MR	No	n.a.	No	n.d.	Regular
SE	Sveriges Ingenjörer				90%	Yes	MR	No	n.a.	No	n.d.	Regular
SI	SLGS (Sinles)				70%	Yes	LR	Yes	70%	Yes	No	Ad hoc
SI	KNSS Independence				70%	Yes	LR	Yes	30%	Yes	No	Ad hoc
SK	OZ DLV				5%	Yes	LR	Yes	100% ⁵⁸	Yes	n.d.	Regular

Notes: Orange shading denotes membership of the EFBWW (yellow indicates indirect membership), purple shading indicates a positive answer and grey shading denotes company-level trade unions. LR, legal requirement; MR, mutual recognition; n.a., not applicable; n.d., no data.

Source: Network of Eurofound Correspondents, 2021

Table 10: Collective bargaining coverage of trade unions, by part of the woodworking sector covered

Member State	Trade union	Affiliation to the EFBWW	Sawmilling and planing	Manufacture of panels	Manufacture of parquet	Manufacture of builders' carpentry	Manufacture of containers	Manufacture of other wood products	Manufacture of engineered wood	Blue-collar workers	White-collar workers	Managerial staff	0-9	10-49	50-249	250+
EU27	66	37 (+ 1)	48	47	38	39	41	45	41	51	50	33	40	45	54	51
AT	GBH															

⁵⁸ It is the only union in the sector.

Representativeness of the European social partner organisations: Woodworking sector

Member State	Trade union	Affiliation to the EFBWW	Sawmilling and planing	Manufacture of panels	Manufacture of parquet	Manufacture of builders' carpentry	Manufacture of containers	Manufacture of other wood products	Manufacture of engineered wood	Blue-collar workers	White-collar workers	Managerial staff	0-9	10-49	50-249	250+
AT	GPA															
BE	(ACV-CSC) BIE															
BE	(ABVV-FGTB) ACCG															
BE	ACLVB-CGSLB															
BG	BFTOFWPI															
CY	Oikodomoi-PEO															
CY	OOIM-SEK															
CZ	OS DLV															
CZ	ZO Kronospan															
CZ	ZO Pila Paskov															
CZ	ZO Stora Enso Wood Products															
DE	IG Metall															
DK	CO-industri															
DK	3F															
EE	EMTAÜ ⁵⁹		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.
EL	OOSEE		n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.
ES	UGT – FICA															
ES	CCOO del Hábitat															
ES	ELA-Industria eta Eraikuntza															
FI	YTN ⁶⁰		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.
FI	Pro															
FI	Teollisuusliitto															
FI	Sähköliitto															
FR	FNCB-CFDT															
FR	FNSCBA-CGT															

⁵⁹ Not involved in collective bargaining. It has been involved in company negotiations in the past, but currently there are no agreements in force and no ongoing negotiations.

⁶⁰ Probably not involved in collective bargaining.

Representativeness of the European social partner organisations: Woodworking sector

Member State	Trade union	Affiliation to the EFBWW	Sawmilling and planing	Manufacture of panels	Manufacture of parquet	Manufacture of builders' carpentry	Manufacture of containers	Manufacture of other wood products	Manufacture of engineered wood	Blue-collar workers	White-collar workers	Managerial staff	0-9	10-49	50-249	250+
FR	FG-FO															
FR	FIBOPA CFE-CGC															
FR	BATI-MAT-TP CFTC															
HR	SSH															
HR	HRSINDSUM															
HU	MEDOSZ															
HU	EFDSZ															
HU	ÉFÉDOSZSZ															
HU	MOFA															
IE	SIPTU															
IE	Fórsa															
IE	Connect															
IT	Fillea – CGIL															
IT	Filca – CISL															
IT	Feneal – UIL															
LT	LBMAJDPS															
LT	KAMDS															
LU	Syndicat Bois, Caoutchouc, Céramique, Chimie, Ciment, Papier, Plastique, Textiles et Verre de l'OGB-L									No sectoral CB	No sectoral CB	No sectoral CB				
LU	LCGB-Indusid									No sectoral CB	No sectoral CB	No sectoral CB	n.a.	n.a.	n.a.	n.a.
LV	LMNA															
MT	None															
NL	CNV Vakmensen															
NL	FNV															
PL	SBiPD NSZZ 'Solidarność'															
PL	ZZ 'Budowlani'															

Representativeness of the European social partner organisations: Woodworking sector

Member State	Trade union	Affiliation to the EFBWW	Sawmilling and planing	Manufacture of panels	Manufacture of parquet	Manufacture of builders' carpentry	Manufacture of containers	Manufacture of other wood products	Manufacture of engineered wood	Blue-collar workers	White-collar workers	Managerial staff	0-9	10-49	50-249	250+
PL	SBDiOŚ NSZZ 'Solidarność' -80 ⁶¹		n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.
PT	Fevicom															
PT	Sindeq															
PT	Setaccop															
PT	SOCN											62				
PT	Sindicato dos Operários Corticeiros do Distrito de Portalegre											63				
PT	SINDCES											64				
RO	FSLIL															
RO	Forestar Tarcău															
SE	GS															
SE	Unionen															
SE	Ledarna															
SE	Sveriges Ingenjörer															
SI	SLGS (Sinles)															
SI	KNSS Independence															
SK	OZ DLV															

Notes: Orange shading denotes membership of the EFBWW (yellow indicates indirect membership), purple shading indicates a positive answer and grey shading denotes company-level trade unions. CB, collective bargaining; GLULAM, glued laminated timber; n.a., not applicable; n.d., no data.

Source: Network of Eurofound Correspondents, 2021

⁶¹ Not involved in collective bargaining.

⁶² If they are salaried workers.

⁶³ If they are salaried workers.

⁶⁴ If they are salaried workers.

2.4. Coverage of employer organisations in the woodworking sector

Table 11 illustrates the sector-relatedness of each of the 73 national woodworking sector employer organisations. The first row gives the total number of organisations with members in each of the economic activities. Below that, the number of Member States in which there is an organisation covering the employers in this part of the sector is given, and further below the Member States for which no organisation was found to organise this part of the sector are listed. This information can be read together with the information on the sector and its specific activities in the first chapter. It is remarkable that in Poland, which is the Member State with the second largest sectoral workforce, there is no employer organisation covering the activities in which most of the workforce is employed – that is, the production of builders’ carpentry (31.5% of the workforce in Poland), sawmilling and planing (26.7%), and the production of other wood products (14.1%).

Table 11: Breakdown of membership of sectoral employer organisations

Member State	Employer organisation	Affiliation to CEI-Bois	Sawmilling and planing	Manufacture of panels	Manufacture of parquet	Manufacture of builders’ carpentry	Manufacture of containers	Manufacture of other wood products	Manufacture of engineered wood products (GLULAM)
EU27	73	17 (+ 3 ⁶⁵)	55	48	37	48	40	52	36
Number of Member States	27		25	24	19	25	20	24	20
Member States for which no employer organisation organises this part of the sector			MT, PL	CY, MT, NL	CZ, EE, IE, LU, MT, NL, PL, SK	LU, PL	CZ, EE, EL, MT, PL, RO, SK	HU, LU, PL	FI, HR, IE, LU, MT, NL, PL
AT	FVHI								
AT	BITH								
AT	BIHB	n.d.							
BE ⁶⁶	Belgische Houtconfederatie								
BE ⁶⁷	Fedustria								
BE ⁶⁸	Houtunie								
BG	BCWFI								
CY	PASYVEX								
CZ	ALDP								
CZ	SZDP								
DE	HDH								
DE	VHI								

⁶⁵ The number in parenthesis indicates indirect affiliations.

⁶⁶ Belgische Houtconfederatie covers only sawmilling and planing (NACE 16.10) (Joint Committee (JC) 125).

⁶⁷ Fedustria organises companies active in the second transformation process of wood (representing industrial companies) (JC 126). It covers all activities except sawmilling, though some sawmills are members.

⁶⁸ Houtunie represents mainly the self-employed and smaller companies (JC 126).

Representativeness of the European social partner organisations: Woodworking sector

Member State	Employer organisation	Affiliation to CEI-Bois	Sawmilling and planing	Manufacture of panels	Manufacture of parquet	Manufacture of builders' carpentry	Manufacture of containers	Manufacture of other wood products	Manufacture of engineered wood products (GLULAM)
DE	GD Holz								
DE	DeSH								
DK	DTI								
DK	TMI								
DK	DI								
DK	DHV								
EE	EMPL								
EE	EPML								
EL	POVSKX								
EL	PSX								
ES	ANFP								
ES	UNEmadera								
ES	ANFTA								
ES	Aefcon								
ES	AEIM								
ES	FEIM								
ES	Cenfim								
ES	Asecor								
ES	Aecork								
FI	Sahateollisuus ry								
FI	Metsäteollisuus ry								
FI	PTY								
FR	UIPP								
FR	UIPC								
FR	FNB								
FR	SEILA								
FR	SIEL GROW								
FR	FTF								
FR	UFME								
FR	UICB								
FR	SEFB								
HR	HUP UDPI								
HR	DK								
HU	FAGOSZ								
HU	Fabunio								
IE	IWFMN								
IT	FLA								
IT	Unital Confapi								
IT	CNA Produzione								
IT	Confartigianato Legno e Arredo								

Representativeness of the European social partner organisations: Woodworking sector

Member State	Employer organisation	Affiliation to CEI-Bois	Sawmilling and planing	Manufacture of panels	Manufacture of parquet	Manufacture of builders' carpentry	Manufacture of containers	Manufacture of other wood products	Manufacture of engineered wood products (GLULAM)
IT	Casartigiani								
IT	CLAAI								
LT	LM								
LU	FEDIL								
LV	LKF								
MT	MEA								
MT	CoC								
NL	EPV	⁶⁹							
NL	NBvT								
NL	VVNH								
PL	SPPD								
PT	AIMMP								
PT	APIMA								
PT	APCOR								
RO	ASFOR								
RO	APPR (RFOA)								
SE	TMF								
SE	Skogsindustrierna								
SI	GZS-ZLPI								
SI	ZDS								
SK	ZSD SR								

Notes: Orange shading denotes membership of CEI-Bois (yellow indicates indirect membership) and green shading denotes a positive answer. Organisations in bold are business associations. GLULAM, glued laminated timber; n.d., no data.

Source: Network of Eurofound Correspondents, 2021

Table 4 in the first chapter indicated that 90% of all woodworking companies employ fewer than 10 employees. Altogether, about 29% of the EU woodworking workforce are employed in these microfirms. Table 12 presents an overview of the activities organised by the employer organisations, specifically for the microfirms they represent. Table 13, in next subsection, indicates the proportion of microfirms, small and medium-sized enterprises (SMEs), and larger firms that are members of each employer organisation. Just as important as having these microfirms as members is whether or not activities that the employer organisations are developing are specifically oriented towards SMEs and microfirms.

⁶⁹ Indirectly through the European Federation of Wooden Pallet and Packaging Manufacturers.

Representativeness of the European social partner organisations: Woodworking sector

Table 12: Activities organised by employer organisations/business associations for SMEs and microfirms

Member State	Employer organisation	Affiliation to CEI-Bois	Activities	Examples of activities
EU27	72	17 (+ 3)	25	
AT	FVHI			
AT	BITH			Members are mostly small or micro carpentry companies; no specific activities could be identified, as the majority of members belong to this group.
AT	BIHB	n.d.	n.d.	
BE	Belgische Houtconfederatie		n.d.	
BE	Fedustria		n.d.	
BE	Houtunie		n.d.	
BG	BCWFI		x	BCWFI organises seminars, roundtables and workshops, and participates in national and international exhibitions, as well as in trade missions, business meetings, etc. For example, it attends meetings of the Executive Agency for Small and Medium-Sized Enterprises and the branch chamber for joint cooperation for SMEs.
CY	PASYVEX		x	PASYVEX participates in a number of different programmes regarding education, competitiveness, productiveness, health and safety, etc., as well as initiatives, such as exhibitions, to promote SMEs' products both in Cyprus and abroad.
CZ	ALDP			
CZ	SZDP			
DE	HDH		x	HDH takes part in sectoral dialogue on the future of the woodworking industry and on climate change, and conducts technical seminars for SME representatives.
DE	VHI			
DE	GD Holz		n.d.	
DE	DeSH		n.d.	
DK	DTI			
DK	TMI			
DK	DI			
DK	DHV		n.d.	
EE	EMPL		x	EMPL runs a work safety working group that allows companies to share experiences in ensuring safe working environments in the industry.
EE	EPML		x	The Estonian Wooden Houses Cluster project, run by the organisation, targets SMEs. The aim of the project is to improve the international competitiveness of the companies participating in the cluster, increasing added value and export turnover.
EL	POVSKX		x	POVSKX submits many requests and proposals to public authorities. It also organises demonstrations/protests on very serious issues. During the pandemic, the organisation requested compensation for its member companies due to the effects of the pandemic on the industry. On 14 June 2021, POVSKX, together with other employer organisations representing SMEs, organised a protest and submitted a memorandum to the Ministry of Labour and Social Affairs, with basic demands for the protection of workers' income in the event of illness or an accident, the

Representativeness of the European social partner organisations: Woodworking sector

Member State	Employer organisation	Affiliation to CEI-Bois	Activities	Examples of activities
				recognition of some professions as detrimental to health, the granting of a pension in the event of an accident, etc.
EL	PSX		x	PSX has received approval for and will implement training and certification programmes for employees in the companies it represents. The staff employed in the companies that are members of PSX are permanent, with stable employment relationships. In terms of the specialties of staff, most are sales workers, office employees, drivers, shopkeepers and, to a lesser extent, carpenters.
ES	ANFP		n.d.	
ES	UNEmadera		n.d.	
ES	ANFTA			
ES	Aefcon		x	Aefcon conducts training initiatives.
ES	AEIM		x	The employer organisation provides courses on a number of issues, including new technologies and their application to woodworking. Moreover, it engages in research activities, often in collaboration with academic institutions, in order to explore innovations and support SMEs.
ES	FEIM		x	FEIM conducts training activities. The organisation also supports trainees in their journey through the dual vocational training system.
ES	Cenfim		x	The types of initiatives mentioned by the chief executive officer of Cenfim aimed at SMEs and microcompanies include providing training activities, support for organisations' promotional activities (including running stalls at events, congresses, etc.) and technical assistance to organisations to enable them to get involved in projects.
ES	Asecor		x	Asecor supports SMEs in internationalising their activities and introducing digital instruments in their companies. ⁷⁰
ES	Aecork		x	The activities aimed at supporting SMEs consist of providing training in diverse topics (including health and safety and internationalisation) and participating in projects and campaigns to extend the use of cork.
FI	Sahateollisuus ry		n.d.	
FI	Metsäteollisuus ry		n.d.	
FI	PTY		x	n.d.
FR	UIPP		n.d.	
FR	UIPC		n.d.	
FR	FNB		n.d.	
FR	SEILA			
FR	SIEL GROW		n.d.	
FR	FTF			
FR	UFME		n.d.	
FR	UICB		n.d.	
HR	HUP UDPI		x	The association helps SMEs and microfirms to apply for EU funds because they very often do not have sufficient knowledge to do so.

⁷⁰ More information on the types of activities can be found at <https://www.asecorclustercorcho.com/actividades-corcho-4-0/>

Representativeness of the European social partner organisations: Woodworking sector

Member State	Employer organisation	Affiliation to CEI-Bois	Activities	Examples of activities
HR	DK		x	The association helps SMEs and microfirms to apply for EU funds because they very often do not have sufficient knowledge to do so.
HU	FAGOSZ			
HU	Fabunio			
IE	IWFMN		x	IWFMN provides training in the use of CNC machines, and in finishing technology, adhesives, dust extraction and the circular economy.
IT	FLA			
IT	Unital Confapi		n.d.	The organisation represents small industrial companies.
IT	CNA Produzione		n.d.	The organisation represents craft companies, including small firms and microfirms.
IT	Confartigianato Legno e Arredo		n.d.	The organisation represents craft companies, including small companies and microfirms.
IT	Casartigiani			
IT	CLAAI ⁷¹		n.d.	
LT	LM			
LU	FEDIL			
LV	LKF		x	The organisation represents mostly small and medium companies.
MT	MEA		x	The association organises the SME Week conference, held every year in October; it also organises focus groups on different topics, and surveys analysed by company size.
MT	CoC		x	The organisation runs several networking events, provides support services for microenterprises and SMEs, holds information and consultation sessions, engages stakeholders on key issues in the sector, and conducts site visits to facilitate knowledge transfer and the sharing of best practices.
NL	EPV	See footnote 70	x	No large companies (> 250 employees) are members, so by definition all initiatives/activities are aimed at SMEs and microfirms. Examples are providing individual member services related to employment conditions, support for training and sustainable employability, and information regarding the handling of the effect of the COVID-19 pandemic on the industry.
NL	NBvT			
NL	VVNH		x	The organisation educates workers on occupational hazards that may arise when using certain machinery.
PL	SPPD			
PT	AIMMP		x	The organisation takes part in international fairs.
PT	APIMA		x	The organisation takes part in international fairs.
PT	APCOR		x	The organisation takes part in international fairs.
RO	ASFOR		x	The organisation is involved in setting out the rules for the sector.
RO	APPR (RFOA) ⁷²			
SE	TMF			
SE	Skogsindustrierna		n.d.	
SI	GZS-ZLPI			
SI	ZDS			

⁷¹ Members are craft companies, including microenterprises and small companies.

⁷² Half of the member companies are microfirms with fewer than 10 employees.

Representativeness of the European social partner organisations: Woodworking sector

Member State	Employer organisation	Affiliation to CEI-Bois	Activities	Examples of activities
SK	ZSD SR			

Notes: Orange shading denotes membership of CEI-Bois (yellow indicates indirect membership) and green shading indicates a positive answer. Organisations in bold are business associations. n.d., no data.

Source: Network of Eurofound Correspondents, 2021

2.5. Membership strength and organisational density of employer organisations

Of the 73 employer organisations and business associations in the woodworking sector, companies are directly affiliated to 65, 15 have regional suborganisations to which companies are affiliated and 9 have subsectoral structures within them to which companies conducting different activities in the sector are affiliated. The organisations' membership in terms of the number of companies affiliated to them is given in the grey column. In Table 13, the proportion of the affiliated companies in the different size groups is provided. The four columns on the right specify whether the membership information provided is exact or an estimate because the organisation also covers activities in other sectors and the membership database is therefore not linked to the sector, or an estimate based on data from different regional databases. For most national employer organisation, the membership strength is given with exact numbers. Information on the collective workforce of all affiliated companies is included in Table 14.

Representativeness of the European social partner organisations: Woodworking sector

Table 13: Membership strength of employer organisations with members in different company size groups

Member State	Employer organisation	Affiliation to CEI-Bois	Companies directly affiliated	Regional suborganisations	Subsectors	Members (absolute number or %)	250+	50-249	10-49	0-9	Exact number	Estimate	Regional database	Not disclosed
EU27	73	17 (+ 3)	65	15	9									
AT	FVHI		x	x		1,250	3%	7%	15%	75%	x			
AT	BITH		x	x		⁷³						x		
AT	BIHB	n.d.	x	x		n.d.								
BE	Belgische Houtconfederatie		x			200 ⁷⁴	x	x	x	x	n.d.	n.d.	n.d.	n.d.
BE	Fedustria		x			350 ⁷⁵	x	x	x	x	x			
BE	Houtunie		x			1,038 ⁷⁶	x	x	x	x	x			
BG	BCWFI		x			19	x	x	x	x	x			
CY	PASYVEX		x			84	0	0	49	35		x		
CZ	ALDP		x			7	0	7	0	0	x			
CZ	SZDP		x			14	0	3	4	7	x			
DE	HDH			x		2,200	131	753	1,273	0			x	
DE	VHI		x			60	30%	60%	10%	0%	x			
DE	GD Holz		x			800	n.d.	n.d.	n.d.	n.d.	x			
DE	DeSH		x			37	n.d.	n.d.	n.d.	n.d.	x			
DK	DTI		x			17	1	4	8	4	x			
DK	TMI		x			58	3	9	29	17	x			
DK	DI		x			152	7	23	47	75	x			
DK	DHV		x			49	0	0	14	35	x			
EE	EMPL		x			67	10	22	26	9	x			

⁷³ BITH and BIHB together organise around 50% of sectoral companies (the other half are represented by FVHI).

⁷⁴ Number includes NACE 16, forestry and wood retail.

⁷⁵ Number includes NACE 16, wood retail, furnishing and textile upholstery. It also includes the furniture sector. No separate number covering only woodwork was provided.

⁷⁶ Number includes personnel in NACE 16, wood retail, furnishing and textile upholstery. Without personnel, there are 805 members. The number also includes the furniture sector.

Representativeness of the European social partner organisations: Woodworking sector

Member State	Employer organisation	Affiliation to CEI-Bois	Companies directly affiliated	Regional suborganisations	Subsectors	Members (absolute number or %)	250+	50-249	10-49	0-9	Exact number	Estimate	Regional database	Not disclosed
EE	EPML		x			180 ⁷⁷	3	23	53	100		x	x	
EL	POVSKX			x	x	2,250 ⁷⁸	None	None	Few	All other		x		
EL	PSX		x			25	0	1	12	12	x			
ES	ANFP		x			12	0	12	0	0	x			
ES	UNEmadera			x	x	23,300 ⁷⁹	n.d.	n.d.	n.d.	n.d.			x	
ES	ANFTA		x			4	4	0	0	0	x			
ES	Aefcon		x			16	1	3	11	0	x			
ES	AEIM		x			116	n.d.	n.d.	n.d.	n.d.	x			
ES	FEIM			x	x	160	n.d.	n.d.	n.d.	n.d.	n.d.	n.d.	n.d.	n.d.
ES	Cenfim		x			35	n.d.	n.d.	n.d.	n.d.		x		
ES	Asecor		x			39	n.d.	n.d.	n.d.	n.d.		x		
ES	Aecork		x			19	0	1	16	2	x			
FI	Sahateollisuus ry		x			30	n.d.	n.d.	n.d.	n.d.	n.d.	n.d.	n.d.	n.d.
FI	Metsäteollisuus ry		x		x	34	9	11	10	4		x		
FI	PTY		x			380	n.d.	n.d.	n.d.	n.d.	x			
FR	UIPP		x			13	n.d.	n.d.	n.d.	n.d.	x			
FR	UIPC		x			17	0	14	3	0	x			
FR	FNB				x	235	n.d.	n.d.	n.d.	n.d.	n.d.	n.d.	n.d.	n.d.
FR	SEILA		x			94	n.d.	n.d.	n.d.	n.d.	n.d.	n.d.	n.d.	n.d.
FR	SIEL GROW		x			45		x	x	x	x			
FR	FTF		x	x		40	1	4	20	15	x			
FR	UFME		x			25	n.d.	n.d.	n.d.	n.d.	n.d.	n.d.	n.d.	n.d.
FR	UICB		x	x		300	n.d.	n.d.	n.d.	n.d.	n.d.	n.d.	n.d.	n.d.
FR	SEFB		x			100		1	9	90				x
HR	HUP UDPI		x	x		174	1	3	90	80		x		

⁷⁷ Number includes all members, and not only those in the woodworking sector.

⁷⁸ According to the estimates of POVSKX, 5% of its total membership are wood processing companies, 50% are in the furniture sector and 45% are in the construction sector (subsector 'joinery installation', as defined by NACE 43.32).

⁷⁹ Number includes packaging and furniture companies.

Representativeness of the European social partner organisations: Woodworking sector

Member State	Employer organisation	Affiliation to CEI-Bois	Companies directly affiliated	Regional suborganisations	Subsectors	Members (absolute number or %)	250+	50-249	10-49	0-9	Exact number	Estimate	Regional database	Not disclosed
HR	DK		x	x		70 ⁸⁰	1	40	20	9		x		
HU	FAGOSZ		x			53	11	16	13	13	x			
HU	Fabunio		x			11	0	1	10	0	x			
IE	IWFMN		x			10%	1	6	55	11	x			
IT	FLA		x			39% ⁸¹	n.d.	n.d.	n.d.	n.d.	x			
IT	Unital Confapi			x		n.d.	n.d.	n.d.	n.d.	n.d.	n.d.	n.d.	n.d.	n.d.
IT	CNA Produzione			x		n.d.	n.d.	n.d.	n.d.	n.d.	n.d.	n.d.	n.d.	n.d.
IT	Confartigianato Legno e Arredo		x			n.d.	n.d.	n.d.	n.d.	n.d.	n.d.	n.d.	n.d.	n.d.
IT	Casartigiani		x			n.d.	n.d.	n.d.	n.d.	n.d.	n.d.	n.d.	n.d.	n.d.
IT	CLAAI		x			n.d.	n.d.	n.d.	n.d.	n.d.	n.d.	n.d.	n.d.	n.d.
LT	LM		x			20-25	Majority	Few	Almost none	None	n.d.	n.d.	n.d.	n.d.
LU	FEDIL		x			4	0	2	2	0	x			
LV	LKF				x	50	x	Majority	Majority	x	x			
MT	MEA		x			2	0	1	1	0	x			
MT	CoC		x			1		1			x			
NL	EPV		x			50	0	Around 10	0-30	< 10	n.d.			
NL	NBvT		x			Roughly 210	3	Few	Most fall into the range of between 2 and 49	n.d.	n.d.			
NL	VVNH ⁸²		x			108	7	n.d.	n.d.	30		x		
PL	SPPD		x			13	13	0	0	0	x			
PT	AIMMP		x			200	1	100	0	100		x		

⁸⁰ Number includes other sectors.

⁸¹ Number includes members in the furniture sector.

⁸² At the end of 2022, VVNH had 108 members with a total of 216 timber outlets in the Netherlands.

Representativeness of the European social partner organisations: Woodworking sector

Member State	Employer organisation	Affiliation to CEI-Bois	Companies directly affiliated	Regional suborganisations	Subsectors	Members (absolute number or %)	250+	50–249	10–49	0–9	Exact number	Estimate	Regional database	Not disclosed
PT	APIMA		x	x	x	250 ⁸³	0	0	0	0		x		
PT	APCOR		x			238	2	25	60	150	x			
RO	ASFOR		x			1,500	20%	20%	40%	20%	x			
RO	APPR (RFOA)		x	x	x	550	52	88	150	260		x	x	
SE	TMF		x			656	18	101	283	254	x			
SE	Skogsindustrierna		x			147	8	40	56	32	x			
SI	GZS-ZLPI		x			30%	n.d.	n.d.	n.d.	n.d.		x		x
SI	ZDS		x			10%	n.d.	n.d.	n.d.	n.d.		x		x
SK	ZSD SR		x		x	56	2	0	27	27	x			

Notes: Orange shading denotes membership of CEI-Bois (yellow indicates indirect membership). Organisations in bold are business associations. n.d., no data.

Source: Network of Eurofound Correspondents, 2021

⁸³ Number includes NACE 16 and NACE 31.

Representativeness of the European social partner organisations: Woodworking sector

The membership strength of employer organisations and business associations can be measured in terms of the number of affiliated companies, but also in terms of the collective workforce of all the affiliated companies. This collective workforce of affiliated companies, or its proportion of the entire sectoral workforce, is included in Table 14, together with the membership trend – that is, whether the membership strength of organisations is increasing, decreasing or stable. In the right column, the organisations are ranked based on membership strength, with the organisations with the largest membership strength given a rank of 1, those with the second largest a rank of 2 and so on.

The national organisations that are affiliated to CEI-Bois at European level are marked in orange in Tables 13 and 14. Thus, both tables together provide the membership strength of CEI-Bois.

Table 14: Membership strength of employer organisations in the woodworking sector

Member State	Employer organisation	Affiliation to CEI-Bois	Members (absolute number or %)	Membership trend	Proportion of the sectoral workforce	Membership strength (1 is the largest, 2 is the second largest, and so on)
EU27	72	17 (+ 3)		Stable = 26 Increasing = 24 Decreasing = 4 n.d./n.a. = 18		
AT	FVHI		1,250	Stable	n.d.	1
AT	BITH		⁸⁴	Increasing	n.d.	2
AT	BIHB	n.d.	n.d.	n.d.	1.5%	3
BE	Belgische Houtconfederatie		200 ⁸⁵	n.d.	n.d.	n.d.
BE	Fedustria		350 ⁸⁶	n.d.	n.d.	n.d.
BE	Houtunie		1,038 ⁸⁷	n.d.	n.d.	n.d.
BG	BCWFI		19	Decreasing	n.d.	Only
CY	PASYVEX		84	Increasing	40%	1
CZ	ALDP		7	Increasing	30%	1
CZ	SZDP		14	Stable	7%	2
DE	HDH		2,200	Stable	200,000 employees	1
DE	VHI		60	Stable	n.d.	n.d.
DE	GD Holz		800	n.d.	n.d.	n.d.
DE	DeSH		37	n.d.	n.d.	n.d.
DK	DTI		17	Decreasing	n.d.	3
DK	TMI		58	Decreasing	n.d.	Largest business association in the sector
DK	DI		152	Increasing	75%	1
DK	DHV		49	Increasing	1%	2
EE	EMPL		67	Increasing	6,250 employees	1
EE	EPML		180 ⁸⁸	Increasing	2,400 employees	2
EL	POVSKX		2,250 ⁸⁹	Stable	n.d.	n.d.
EL	PSX		25	Stable	n.d.	n.d.
ES	ANFP		12	Stable	n.d.	n.d.
ES	UNEmadera		23,300 ⁹⁰	Increasing	163,000 employees	1

⁸⁴ BITH and BIHB together organise around 50% of sectoral companies (the other half are represented by FVHI).

⁸⁵ Number includes NACE 16, forestry and wood retail.

⁸⁶ Number includes NACE 16, wood retail, furnishing and textile upholstery.

⁸⁷ Number includes personnel in NACE 16, wood retail, upholstery and furnishing. Without personnel, there are 805 members.

⁸⁸ All members, and not only those in the woodworking sector.

⁸⁹ According to the estimates of POVSKX, 5% of its total membership are wood processing companies, 50% are in the furniture sector and 45% are in the construction sector (subsector 'joinery installation', as defined by NACE 43.32).

⁹⁰ Number includes packaging and furniture companies.

Representativeness of the European social partner organisations: Woodworking sector

Member State	Employer organisation	Affiliation to CEI-Bois	Members (absolute number or %)	Membership trend	Proportion of the sectoral workforce	Membership strength (1 is the largest, 2 is the second largest, and so on)
ES	ANFTA		4	Stable	15–20%	Largest organisation in the panel sector
ES	Aefcon		16	Increasing	5–10%	
ES	AEIM		116	Increasing	10–15%	n.d.
ES	FEIM		160	Increasing	25–30%	n.d.
ES	Cenfim		35	Increasing	5–10%	n.d.
ES	Asecor		39	Stable	5%	
ES	Aecork		19	Increasing	5%	
FI	Sahateollisuus ry		30	n.d.	15%	3
FI	Metsäteollisuus ry		34	Stable	35%	1
FI	PTY		380	Decreasing	40%	2
FR	UIPP		13	n.d.	6%	n.d.
FR	UIPC		17	Stable	1.7%	n.d.
FR	FNB		235	n.d.	14–20%	n.d.
FR	SEILA		94	Stable	5–10%	n.d.
FR	SIEL GROW		45	n.d.	3–4%	n.d.
FR	FTF		40	n.d.	2–3%	n.d.
FR	UFME		25	n.d.	11–12%	n.d.
FR	UICB		300	n.d.	3–4%	n.d.
FR	SEFB		100	Increasing	2%	n.d.
HR	HUP UDPI		174	Stable	90%	Only employee organisation in the sector
HR	DK		70 ⁹¹	Stable	35–40%	Only business association in the sector
HU	FAGOSZ		53	Stable	6,299 employees	1
HU	Fabunio		11	Increasing	324 employees	1
IE	IWFMM		10%	Increasing	10–12%	1
IT	FLA		39% ⁹²	n.d.	20%	1
IT	CNA Produzione		n.d.	n.a.	n.a.	n.d.
IT	Confartigianato Legno e Arredo		n.d.	n.a.	n.a.	n.d.
IT	Casartigiani		n.d.	n.a.	n.a.	n.d.
IT	CLAAI		n.d.	n.a.	n.a.	n.d.
LT	LM		20–25	Stable	About 30%	1
LU	FEDIL		4	Stable	n.d.	1
LV	LKF		50	Increasing	30%	1
MT	MEA		2	Stable	39%	1
MT	CoC		1	Stable	22.4%	2

⁹¹ Number includes other sectors.

⁹² Number includes the furniture sector.

Representativeness of the European social partner organisations: Woodworking sector

Member State	Employer organisation	Affiliation to CEI-Bois	Members (absolute number or %)	Membership trend	Proportion of the sectoral workforce	Membership strength (1 is the largest, 2 is the second largest, and so on)
NL	EPV	See footnote 70	50	Increasing	58%	3 or 4
NL	NBvT		About 210	Increasing	55–60% of the total workforce in subsector 16.23. Subsector 16.23 is one of the largest subsectors. Therefore, the percentage of the sectoral workforce in member companies of this employer organisation is substantial	Largest in subsector 16.23 and probably the largest or second largest in the whole sector
NL	VVNH		108	Stable	70% of the total workforce in subsector 16.10. This is probably the second largest subsector after 16.23	Largest in subsector 16.10. Probably the second largest overall
PL	SPPD		13	Stable	About 5%	1
PT	AIMMP		200	Increasing	31%	1
PT	APIMA		250 ⁹³	Increasing	Insignificant	Small or very small
PT	APCOR		238	Stable	27%	2
RO	ASFOR		1,500	Increasing	25%	1
RO	APPR (RFOA)		550	Increasing	10%	2 ⁹⁴
SE	TMF		656	Stable	85%	1
SE	Skogsindustrierna		147	Stable	85%	1
SI	GZS-ZLPI		30%	Increasing	70%	1
SI	ZDS		10%	Stable	40%	2
SK	ZSD SR		56	Stable	15%	1

Notes: Orange shading denotes membership of CEI-Bois (yellow indicates indirect membership). Organisations in bold are business associations. n.a., not applicable; n.d., no data.

Source: Network of Eurofound Correspondents, 2021

⁹³ Total for formal domain (NACE 16 and 31).

⁹⁴ APPR reports that it is the third largest employer organisation in Romania; however, we only identified two organisations. No information is available on the third organisation in the woodworking sector in Romania.

2.6. Status of employer organisations and their involvement in collective bargaining and social dialogue

In Table 15, the place of each of the national sectoral employer organisations and business associations in the sectoral industrial relations landscape is described. From left to right, the table covers their involvement in collective bargaining, their recognition as representative employer organisations for the sector, and their involvement in social dialogue, paritarian organisations or government consultations. In the far-right column, the number of staff in each organisation is indicated.

Purple shading indicates whether the employer organisation is involved in MEB at sector level or SEB at company level. A total of 40 employer organisations are involved in MEB, 6 are involved in SEB and 4 are involved in both MEB and SEB. As shown in the grey columns, 57 employer organisations are considered representative of the sector; for 24 of them, this is based on mutual recognition, for 15 it is based on the fulfilment of legal requirements, and for 9 it is based on a combination of mutual recognition and fulfilling legal requirements. On the right of the grey columns, the organisations' involvement in social dialogue at national level is indicated. Of all the 73 sectoral employer organisations, 33 are involved in sectoral social dialogue structures, 31 participate in paritarian organisations and 41 are consulted by their governments on sector-related matters.

Table 16 presents an overview of the activities covered in the collective bargaining in which the employer organisations are involved. Table 17 shows the size of the companies involved in collective bargaining.

Representativeness of the European social partner organisations: Woodworking sector

Table 15: Status of national employer organisations in the woodworking sector

Member State	Employer organisation	CEI-Bois	MEB	SEB	Is the organisation considered representative in your country?	Method of recognition	Is the organisation involved in bipartite or tripartite social dialogue related to the woodworking sector?	Is the organisation involved in paritarian organisations?	Type of consultation with government	Number of employees
EU27	73	17 (+ 3)	40	6	Yes = 57 No = 16	LR and MR = 10 LR = 17 MR = 30 Not applicable = 16	Yes = 33 No = 39 n.d. = 1	Yes = 31 No = 41 n.d. = 1	Ad hoc = 20 Regular = 18 None = 17 n.d. = 14 Ad hoc and regular = 3 Yes = 1	
AT	FVHI				Yes	LR and MR	Yes	No	Ad hoc and regular	15
AT	BITH				Yes	LR and MR	No	No	Ad hoc	5
AT	BIHB				Yes	LR and MR	No	No	n.d.	n.d.
BE	Belgische Houtconfederatie				Yes	LR	Yes	Yes	Regular	n.d.
BE	Fedustria				Yes	LR	Yes	Yes	Regular	n.d.
BE	Houtunie				Yes	LR	Yes	Yes	Regular	n.d.
BG	BCWFI				Yes	MR	Yes	No	Regular	3
CY	PASYVEX				Yes	MR	No	Yes	Regular	0
CZ	ALDP				No	Not applicable	Yes	No	Ad hoc	1
CZ	SZDP				No	Not applicable	No	No	Ad hoc	0
DE	HDH				Yes	MR	No	No	Regular	10
DE	VHI				No	Not applicable	No	No	Ad hoc and regular	4
DE	GD Holz				No	Not applicable	No	No	n.d.	n.d.
DE	DeSH				No	Not applicable	No	n.d.	n.d.	19

Representativeness of the European social partner organisations: Woodworking sector

Member State	Employer organisation	CEI-Bois	MEB	SEB	Is the organisation considered representative in your country?	Method of recognition	Is the organisation involved in bipartite or tripartite social dialogue related to the woodworking sector?	Is the organisation involved in paritarian organisations?	Type of consultation with government	Number of employees
DK	DTI				Yes	MR	No	Yes	Ad hoc	1
DK	TMI				Yes	MR	Yes	Yes	Ad hoc	7
DK	DI				Yes	MR	Yes	Yes	Regular	900
DK	DHV				Yes	MR	No	Yes	Ad hoc	9
EE	EMPL				No	Not applicable	Yes	No	Ad hoc	4
EE	EPML				No	Not applicable	No	No	None	4
EL	POVSKX				Yes	MR	No	No	None	0
EL	PSX				Yes	LR and MR	No	No	None	1
ES	ANFP				No	Not applicable	No	No	None	2-3
ES	UNEmadera				Yes	LR	No	No	None	3
ES	ANFTA				Yes	MR	No	No	None	3
ES	Aefcon				No	Not applicable	No	No	None	
ES	AEIM				Yes	LR and MR	No	No	None	3
ES	FEIM				Yes	LR	No	No	None	3
ES	Cenfim				No	Not applicable	No	No	None	10 to 15
ES	Asecor				Yes	LR and MR	No	No	None	6
ES	Aecork				Yes	LR and MR	No	No	None	1-2 (estimate)
FI	Sahateollisuus ry				No	Not applicable	No	No	n.d.	4
FI	Metsäteollisuus ry				Yes	MR	Yes	No	Ad hoc	30
FI	PTY				Yes	MR	No	No	None	2
FR	UIPP				No	Not applicable	Yes	Yes	n.d.	1
FR	UIPC				No	Not applicable	Yes	Yes	Ad hoc and regular	1
FR	FNB				Yes	LR	Yes	Yes	Ad hoc	13

Representativeness of the European social partner organisations: Woodworking sector

Member State	Employer organisation	CEI-Bois	MEB	SEB	Is the organisation considered representative in your country?	Method of recognition	Is the organisation involved in bipartite or tripartite social dialogue related to the woodworking sector?	Is the organisation involved in paritarian organisations?	Type of consultation with government	Number of employees
FR	SEILA				Yes	LR	Yes	Yes	None	n.d.
FR	SIEL GROW				Yes	LR	Yes	Yes	n.d.	15
FR	FTF				Yes	LR	Yes	Yes	n.d.	n.d.
FR	UFME				Yes	LR	Yes	Yes	n.d.	0
FR	UICB				Yes	LR	Yes	Yes	n.d.	4
FR	SEFB				No	Not applicable	No	No	None	6
HR	HUP UDPI				Yes	LR	No	No	Regular	4
HR	DK				No	Not applicable	No	No	Unknown	5
HU	FAGOSZ				Yes	MR	Yes	No	Ad hoc	2
HU	Fabunio				Yes	MR	No	No	Ad hoc	3
IE	IWFMN				Yes	MR	Yes	Yes	Ad hoc	2
IT	FLA				Yes	MR	Yes	Yes	Regular	120
IT	Unital Confapi				Yes	MR	Yes	Yes	n.d.	
IT	CNA Produzione				Yes	MR	Yes	Yes	n.d.	n.d.
IT	Confartigianato Legno e Arredo				Yes	MR	Yes	Yes	n.d.	n.d.
IT	Casartigiani				Yes	MR	Yes	Yes	n.d.	n.d.
IT	CLAAI				Yes	MR	Yes	Yes	n.d.	n.d.
LT	LM				Yes	MR	No	No	Ad hoc	2
LU	FEDIL				Yes	MR	No	No	None	20–25
LV	LKF				Yes	LR	Yes	Yes	Regular	2
MT	MEA				Yes	LR	No	No	Ad hoc	5
MT	CoC				Yes	LR	No	No	None	20
NL	EPV	See footnot e 70			Yes	LR and MR	Yes	Yes	Ad hoc	1.2–1.3

Representativeness of the European social partner organisations: Woodworking sector

Member State	Employer organisation	CEI-Bois	MEB	SEB	Is the organisation considered representative in your country?	Method of recognition	Is the organisation involved in bipartite or tripartite social dialogue related to the woodworking sector?	Is the organisation involved in paritarian organisations?	Type of consultation with government	Number of employees
NL	NBvT				Yes	LR and MR	Yes	Yes	Ad hoc	12
NL	VVNH				Yes	LR and MR	Yes	Yes	Ad hoc	5
PL	SPPD				Yes	MR	No	No	Regular	1
PT	AIMMP				Yes	MR	No	Yes	Ad hoc	17
PT	APIMA				Yes	MR	No	No	Regular	6
PT	APCOR				Yes	MR	n.d.	Yes	Regular	6
RO	ASFOR				Yes	LR	Yes	Yes	Regular	25
RO	APPR (RFOA)				No	Not applicable	Yes	No	Regular	1
SE	TMF				Yes	MR	No	Yes	Regular	22
SE	Skogsindustrierna				Yes	MR	No	No	Regular	25
SI	GZS-ZLPI				Yes	MR	No	No	Ad hoc	3
SI	ZDS				Yes	MR	No	No	Ad hoc	13
SK	ZSD SR				Yes	LR	Yes	No	Regular	3

Notes: Orange shading denotes membership of CEI-Bois (yellow indicates indirect membership) and purple shading denotes a positive answer. Organisations in bold are business associations. n.d., no data.

Source: Network of Eurofound Correspondents, 2021

Representativeness of the European social partner organisations: Woodworking sector

In Table 16, the coverage of the collective bargaining in terms of the different activities in the sector is described in detail for each of the national employer organisations involved in collective bargaining.

Table 16: Involvement of employer organisations in the woodworking sector in collective bargaining, by activity, 2021

Member State	Employer organisation	CEI-Bois	Sawmilling and planing	Manufacture of panels	Manufacture of parquet	Manufacture of builders' carpentry	Manufacture of containers	Manufacture of other wood products	Manufacture of engineered wood products (GLULAM)
EU27	71	17 (+ 3)	30	24	25	31	26	34	26
AT	FVHI								
AT	BITH								
AT	BIHB	n.d.							
BE	Belgische Houtconfederatie								
BE	Fedustria								
BE	Houtunie								
BG	BCWFI		n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.
CY	PASYVEX								
CZ	ALDP								
CZ	SZDP								
DE	HDH								
DE	VHI		n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.
DE	GD Holz		n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.
DE	DeSH		n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.
DK	DTI		n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.
DK	TMI								
DK	DI								
DK	DHV								
EE	EMPL		n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.
EE	EPML		n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.
EL	POVSKX		n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.
EL	PSX		n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.
ES	ANFP		n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.
ES	UNEmadera		n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.
ES	ANFTA		n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.
ES	Aefcon		n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.
ES	AEIM		n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.
ES	FEIM		n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.
ES	Cenfim		n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.
ES	Asecor								
ES	Aecork								
FI	Sahateollisuus ry		n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.
FI	Metsäteollisuus ry		n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.
FI	PTY								
FR	UIPP								
FR	UIPC								
FR	FNB								
FR	SEILA								
FR	SIEL GROW								
FR	FTF								
FR	UFME								
FR	UICB								
FR	SEFB								
HR	HUP UDPI		n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.

Representativeness of the European social partner organisations: Woodworking sector

Member State	Employer organisation	CEI-Bois	Sawmilling and planing	Manufacture of panels	Manufacture of parquet	Manufacture of builders' carpentry	Manufacture of containers	Manufacture of other wood products	Manufacture of engineered wood products (GLULAM)
HR	DK		n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.
HU	FAGOSZ		n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.
HU	Fabunio		n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.
IE	IWFMN		n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.
IT	FLA								
IT	Unital Confapi								
IT	CNA Produzione								
IT	Confartigianato Legno e Arredo								
IT	Casartigiani								
IT	CLAAI								
LT	LM		n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.
LU	FEDIL		n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.
LV	LKF		n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.
MT	MEA		n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.
MT	CoC		n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.
		See footnote 70							
NL	EPV								
NL	NBvT								
NL	VVNH								
PL	SPPD		n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.
PT	AIMMP								
PT	APIMA								
PT	APCOR								
RO	ASFOR								
RO	RFOA								
SE	TMF								
SE	Skogsindustrierna								
SI	GZS-ZLPI								
SI	ZDS								
SK	ZSD SR								

Notes: Orange shading denotes membership of CEI-Bois (yellow indicates indirect membership) and purple shading denotes a positive answer. Organisations in bold are business associations. GLULAM, glued laminated timber; n.a., not applicable; n.d., no data.

Source: Network of Eurofound Correspondents, 2021

Representativeness of the European social partner organisations: Woodworking sector

Table 17: Involvement of employer organisations in the woodworking sector in collective bargaining, by company size group, 2021

Member State	Employer organisation	Affiliation to CEI-Bois	0–9 employees	10–49 employees	50–249 employees	More than 250 employees
EU27	71	17 (+ 1)	38	43	39	29
AT	FVHI					
AT	BITH					
AT	BIHB	n.d.				
BE	Belgische Houtconfederatie					
BE	Fedustria					
BE	Houtunie					
BG	BCWFI		n.a.	n.a.	n.a.	n.a.
CY	PASYVEX					
CZ	ALDP					
CZ	SZDP					
DE	HDH					
DE	VHI		n.a.	n.a.	n.a.	n.a.
DE	GD Holz		n.a.	n.a.	n.a.	n.a.
DE	DeSH		n.a.	n.a.	n.a.	n.a.
DK	DTI					
DK	TMI					
DK	DI					
DK	DHV					
EE	EMPL		n.a.	n.a.	n.a.	n.a.
EE	EPML		n.a.	n.a.	n.a.	n.a.
EL	POVSKX		n.a.	n.a.	n.a.	n.a.
EL	PSX		n.a.	n.a.	n.a.	n.a.
ES	ANFP		n.a.	n.a.	n.a.	n.a.
ES	UNEmadera		n.a.	n.a.	n.a.	n.a.
ES	ANFTA		n.a.	n.a.	n.a.	n.a.
ES	Aefcon		n.a.	n.a.	n.a.	n.a.
ES	AEIM		n.a.	n.a.	n.a.	n.a.
ES	FEIM		n.a.	n.a.	n.a.	n.a.
ES	Cenfim		n.a.	n.a.	n.a.	n.a.
ES	Asecor					
ES	Aecork					
FI	Sahateollisuus ry		n.a.	n.a.	n.a.	n.a.
FI	Metsäteollisuus ry		n.a.	n.a.	n.a.	n.a.
FI	PTY					
FR	UIPP					
FR	UIPC					
FR	FNB					
FR	SEILA					
FR	SIEL GROW					
FR	FTF					
FR	UFME					
FR	UICB					
FR	SEFB					
HR	HUP UDPI		n.a.	n.a.	n.a.	n.a.
HR	DK		n.a.	n.a.	n.a.	n.a.
HU	FAGOSZ		n.a.	n.a.	n.a.	n.a.
HU	Fabunio		n.a.	n.a.	n.a.	n.a.
IE	IWFMMN		n.a.	n.a.	n.a.	n.a.
IT	FLA					
IT	Unital Confapi					
IT	CNA Produzione					
IT	Confartigianato Legno e Arredo					
IT	Casartigiani					

Representativeness of the European social partner organisations: Woodworking sector

IT	CLAAI					
LT	LM		n.a.	n.a.	n.a.	n.a.
LU	FEDIL		n.a.	n.a.	n.a.	n.a.
LV	LKF		n.a.	n.a.	n.a.	n.a.
MT	MEA					
MT	CoC					
NL	EPV					
NL	NBvT					
NL	VVNH					
PL	SPPD		n.a.	n.a.	n.a.	n.a.
PT	AIMMP					
PT	APIMA					
PT	APCOR					
RO	ASFOR					
RO	APPR (RFOA)					
SE	TMF					
SE	Skogsindustrierna					
SI	GZS-ZLPI					
SI	ZDS					
SK	ZSD SR					

Notes: Orange shading denotes membership of CEI-Bois (yellow indicates indirect membership) and purple shading denotes a positive answer. Organisations in bold are business associations. n.a., not applicable; n.d., no data.

Source: Network of Eurofound Correspondents, 2021

2.7. Overview of collective bargaining and social dialogue practices in the woodworking sector

Table 18: Number and percentage of organisations involved in types of collective bargaining in the woodworking sector

Type of collective bargaining	Trade union		Employer organisation	
	Number	%	Number	%
No collective bargaining	5	7.6	28	39.4
MEB only	13	19.7	36	50.7
Both SEB and MEB	27*	40.9	4	5.6
SEB only	21	31.8	3	4.2

Note: (*) The number includes the business association TMI (Denmark), which takes part in collective bargaining through DI.

Source: Network of Eurofound Correspondents, 2021

Table 19: Type of collective bargaining, by country

Type of collective bargaining	Member States
MEB	AT, FI, NL, PT
SEB and MEB	BE, CY, CZ, DE, DK, ES, FR, HU, IT, SE, SI, SK
SEB	BG, EE, HR, IE, LT, LU, LV, PL, RO
No collective bargaining	EL, MT

Source: Network of Eurofound Correspondents, 2021

Table 20: Collective bargaining coverage, by country

Type of collective bargaining	Collective bargaining coverage						Information not available
	> 94%	75–94%	50–74%	25–49%	1–24%	0%	
MEB	AT, PT	FI, NL					
SEB and MEB	BE, FR, IT	DK, ES, SE	SI	CY, DE	CZ, HU, SK		
SEB		LU	HR, RO		BG, IE, LT, LV, PL		EE
No collective bargaining						MT	EL

Note: Values for Denmark, Germany and Spain are estimates.

Source: Network of Eurofound Correspondents, 2021

Table 21: Employers and trade unions consulted, by country

	Trade unions consulted	No trade unions consulted
Employer organisations/business associations consulted	AT, BE, CY, CZ, DE, DK, FI, FR, IT, LV, NL, PL, RO, SE, SI, SK	BG, EE, HR, HU, IE, LT
No employer organisations/business associations consulted		ES, EL, LU

Notes: Malta has no trade union; in Portugal, no information was provided by the trade union.

Source: Network of Eurofound Correspondents, 2021

2.8. Reasons for fragmentation and pluralism in the woodworking sector

Table 22: Reasons for the fragmentation and pluralism of trade unions in the woodworking sector, 2021

Member State	There are specific trade unions for specific professions, for example engineers	They organise different categories of workers	They have members in different parts of the country	They have members in different types of company (in terms of size or ownership)	They have members in different parts of the sector/covering different types of activities	They have similar membership domains but differ in terms of ideology	Other reason
AT							
BE							
BG							
CY							
CZ	There is only one trade union in the sector.						
DE	There is only one trade union in the sector.						
DK							(1)
EE							
EL	There is only one trade union in the sector.						
ES							
FI							
FR							
HR	There is only one trade union in the private sector and one in the public sector, and therefore there is no fragmentation.						
HU							
IE							
IT							
LT							
LU							
LV	There is only one trade union in the sector.						
MT	There are no trade unions in the sector.						
NL							
PL							
PT							
RO	Basically, there is only one large trade union federation in the sector (FSLIL); the other trade union is small (a company trade union). Therefore, we cannot say if there is fragmentation in the sector.						
SE							
SI	There is only one trade union in the sector.						
SK	There is only one trade union in the sector.						

Notes: (1) The trade union 3F is a member of the larger trade union association CO-industri. 3F negotiates the collective agreement for the woodworking and furniture industries, but the white-collar workers in the industries are covered by the collective bargaining of CO-industri.

Source: Network of Eurofound Correspondents, 2021

Table 23: Reasons for the fragmentation and pluralism of employer organisations in the woodworking sector, 2021

Member State	The organisations founded for business interests are different from the organisations for matters of working conditions and collective bargaining	They have members in different parts of the country	There are different organisations for different types/sizes of companies	They have members in different parts of the sector/covering different types of activities	They have similar membership domains but differ in terms of ideology	Other reasons
AT						(1)
BE						
BG	There is only one employer organisation in the sector.					
CY						(2)
CZ						
DE						(3)
DK						(4)
EE						(5)
EL						
ES						
FI						
FR						
HR	There is only one employer organisation in the sector.					
HU						
IE						
IT						
LT	There is only one employer organisation in the sector.					
LU						
LV	There is only one employer organisation in the sector.					
MT	(6)					
NL						
PL	There is only one employer organisation in the sector.					
PT						
RO						
SE						
SI	There is only one employer organisation in the sector.					
SK	There is only one employer organisation in the sector.					

Notes: (1) The FVHI organises and represents large industrial enterprises, while BITHGG and BIH organise and represent small enterprises in the trade/crafts sector. (2) Some organisations operate as business associations while others function as employer organisations (involved in collective bargaining). They have different organisational purposes. (3) The DTI is a business association under the TMI, which is a business association under DI. (4) The EPML represents only companies in the woodworking sector, while the EMPL represents a couple of companies in the woodworking sector but mostly other companies, and concentrates on forestry. (5) While the MEA and CoC have a number of shared objectives, the MEA is predominantly concerned with the regulation of relationships between employers, workers and trade unions, whereas the CoC is more focused on ensuring that companies enjoy the best competitive environment and regulatory conditions possible for the conduct of business.

Source: Network of Eurofound Correspondents, 2021

2.9. Bipartite and tripartite social dialogue bodies in the woodworking sector

There are 23 bipartite and tripartite bodies for the woodworking sector in 12 Member States (Table 24). A total of 18 are bipartite and 5 are tripartite. They are equally divided between statutory bodies and those established by collective agreements and cover a wide array of topics. Health and safety and training are among the most common areas of responsibility of such bodies (Denmark, Finland, France and Romania). Other bodies deal with general sectoral issues (France, Hungary and Slovenia), including pensions and social security (France and Italy).

In Belgium, there are a few different joint committees in which social dialogue takes place and collective bargaining agreements are made. Joint Committee 125 covers the entire woodworking sector. It has three subcommittees, including Joint Committee 125.01, for forestry; Joint Committee 125.02, for sawmilling; and Joint Committee 125.03, for wood trade. There is also a Joint Committee 126, covering upholstery and woodworking. The coexistence of these different joint committees within the sector in Belgium may result in different collectively agreed working conditions in different parts of the sector. While the Belgian representative trade unions are the same for the joint committees, the representative employer organisations are different for the different joint committees, as can be seen in Table 24, in the far-right column.

Representativeness of the European social partner organisations: Woodworking sector

Table 24: Bipartite and tripartite bodies relevant to the woodworking sector, 2020

Member State	Body	Type	Areas of responsibility	Method of establishment	Trade unions	Employer organisations
EU27	23 sector-related social dialogue bodies in 12 Member States: 18 bipartite and 5 tripartite					
BE	Joint Committee 126	Bipartite	Joint committee	Statutory	(ACV-CSC) BIE, (ABVV-FGTB) ACCG, BBTK-SETCa, ACLVB-CGSLB	Houtunie, Fedustria
BE	Joint Committee 125.02	Bipartite	Joint committee	Statutory	(ACV-CSC) BIE, (ABVV-FGTB) ACCG, BBTK-SETCa, ACLVB-CGSLB	Belgische Houtconfederatie, Nationaleuniehoutsector
BE	Joint Committee 125.03	Bipartite	Joint committee	Statutory	(ACV-CSC) BIE, (ABVV-FGTB) ACCG, BBTK-SETCa, ACLVB-CGSLB	Belgische Houtconfederatie, Nationaleuniehoutsector
BG	National Council for Tripartite Cooperation	Tripartite	Economic and social development, including the labour market, social security, pensions, etc.	Statutory, since 1992	CITUB, CT Podkrepa	Bulgarian Chamber of Commerce and Industry, Bulgarian Industrial Association, Bulgarian Industrial Capital Association, Confederation of Employers and Industrialists in Bulgaria, Union for Private Economic Enterprise
BG	Economic and Social Council	Tripartite	Participation of civil society in the economic and social development of the country	Established by an act (State Gazette No. 41/2001)	CITUB, CT Podkrepa	Bulgarian Chamber of Commerce and Industry, Bulgarian Industrial Association, Bulgarian Industrial Capital Association, Confederation of Employers and Industrialists in Bulgaria, Union for Private Economic Enterprise

Representativeness of the European social partner organisations: Woodworking sector

Member State	Body	Type	Areas of responsibility	Method of establishment	Trade unions	Employer organisations
CZ	Sectoral tripartite organisation in the woodworking industry	Tripartite	Bark beetle calamity, employment of foreign workers, problems related to the COVID-19 pandemic, etc.	No agreement	Sectoral tripartite organisation in the woodworking industry	Tripartite
DK	BFA Industri (Trade Association of Industry)	Bipartite	Working environment council for the entire manufacturing industry (including the committee 'The Danish Wood Initiative')	Statutory	CO-industri, Dansk Metal, 3F Industri, HK Privat, Dansk EI-Forbund, Fødevareforbundet NNF, Teknisk Landsforbund	Dansk Industri (DI), Grakom, Mediearbejdsgiverne, Dansk Mode og Textil, Lederne

Representativeness of the European social partner organisations: Woodworking sector

Member State	Body	Type	Areas of responsibility	Method of establishment	Trade unions	Employer organisations
EE	Estonian Forest Certification Council (EMSN)	Bipartite ⁹⁵	A non-profit association operating in the public interest, whose aim is to contribute to the implementation of responsible and sustainable forestry principles in Estonia and raise awareness of responsible forestry, production and consumption among forest owners, the forest and timber industry, forestry stakeholders and consumers)	Agreement	EMTAÜ ⁹⁶	EMPL
FI	Puuteollisuuden työalatoimikunta (Wood Industry Sector Committee)	Bipartite	Occupational safety	Agreement ⁹⁷	Industrial Union, Finnish Electrical Workers' Union, Pro, The Finnish Business School Graduates ⁹⁸	Metsäteollisuus ry

⁹⁵ Trade unions, business associations, private forest owners and some other non-governmental organisations.

⁹⁶ According to its website.

⁹⁷ Information is probably correct, but is based on assumptions.

⁹⁸ A member of the YTN.

Representativeness of the European social partner organisations: Woodworking sector

Member State	Body	Type	Areas of responsibility	Method of establishment	Trade unions	Employer organisations
FR	Commission paritaire permanente de négociation et d'interprétation (CPPNI)	Bipartite	Collective bargaining and the interpretation of the national collective agreement for mechanical woodworking, sawmills, and timber trade and import (Convention collective nationale du travail mécanique du bois, des scieries, du négoce et de l'importation des bois)	Agreement	FNCB-CFDT, FNCSBA-CGT, FG-FO, CFE-CGC, BA-TI-MAT CFTC	FNB, FTF, SEILA, SIEL GROW
FR	Commission paritaire permanente de négociation et d'interprétation (CPPNI)	Bipartite	Collective bargaining and the interpretation of the national collective agreement for joinery, carpentry, industrialised construction and flat doors (Convention collective nationale des menuiseries, charpentes et constructions industrialisées et portes planes)	Agreement	FNCB-CFDT, FNCSBA-CGT, FG-FO	UICB, UFME

Representativeness of the European social partner organisations: Woodworking sector

Member State	Body	Type	Areas of responsibility	Method of establishment	Trade unions	Employer organisations
FR	Commission paritaire permanente de négociation et d'interprétation (CPPNI)	Bipartite	Collective bargaining and the interpretation of the national collective agreement for the wood-based panel industry (Convention collective nationale de l'industrie des panneaux à base de bois)	Agreement	FNCB-CFDT, FNCSBA-CGT, FG-FO, CFE-CGC, BA-TI-MAT CFTC	UIPC, UIPP
FR	Commission paritaire nationale de l'emploi et de la formation National collective agreement for mechanical woodworking, sawmills, and timber trade and import (Convention collective nationale du travail mécanique du bois, des scieries, du négoce et de l'importation des bois)	Bipartite	Information exchange, study, consultation and deliberation in the field of vocational training and employment	Agreement	FNCB-CFDT, FNCSBA-CGT, FG-FO, CFE-CGC, BA-TI-MAT CFTC	FNB, FTF, SEILA, SIEL GROW

Representativeness of the European social partner organisations: Woodworking sector

Member State	Body	Type	Areas of responsibility	Method of establishment	Trade unions	Employer organisations
FR	Commission paritaire nationale de l'emploi et de la formation National collective agreement for joinery, carpentry, industrialised construction and flat doors (Convention collective nationale des menuiseries, charpentes et constructions industrialisées et portes planes)	Bipartite	Information exchange, study, consultation and deliberation in the field of vocational training and employment	Agreement	FNCB-CFDT, FNCSBA-CGT, FG-FO	UICB, UFME
FR	Commission paritaire nationale de l'emploi et de la formation National collective agreement for the wood-based panel industry (Convention collective nationale de l'industrie des panneaux à base de bois)	Bipartite	Information exchange, study, consultation and deliberation in the field of vocational training and employment	Agreement	FNCB-CFDT, FNCSBA-CGT, FG-FO, CFE-CGC, BA-TI-MAT CFTC	UIPC, UIPP
HU	Faipari, Erdészeti és Bútoripari Ágazati Párbeszéd Bizottság (Social Dialogue Committee for the Wood, Forestry and Furniture Industry)	Bipartite	Activities under NACE 16	Statutory	EFDSZ	FAGOSZ
IT	Comitato Paritetico Nazionale Legno e Arredamento (CPNLA)	Bipartite	General situation of the sector, the labour market, safety and labour costs	Agreement	FENEAL – UIL, FILCA – CISL, Fillea – CGIL	FederlegnoArredo

Representativeness of the European social partner organisations: Woodworking sector

Member State	Body	Type	Areas of responsibility	Method of establishment	Trade unions	Employer organisations
IT	Comitato paritetico nazionale	Bipartite	General situation of the sector, the labour market, safety, apprenticeships and equal opportunities	Agreement	FENEAL – UIL, FILCA – CISL, Fillea – CGIL	Unital Confapi
IT	Osservatorio per i settori Legno, Arredamento, Mobili, Escavazione e Lavorazione dei materiali Lapidari	Bipartite	General situation of the sector, the labour market, safety, apprenticeships and equal opportunities	Agreement	FENEAL – UIL, FILCA – CISL, Fillea – CGIL	CNA Produzione, Confartigianato Legno e Arredo, Casartigiani, CLAAI
NL	Social and Economic Council (SER)	Tripartite	Cross-sectoral, acting as an advisory and research body, as well as a forum for policy negotiations	Statutory ⁹⁹	CNV Vakmensen, FNV, Vakcentrale voor Professionals (VCP) ¹⁰⁰	VNO-NCW, Land- en Tuinbouworganisatie Nederland (LTO) ¹⁰¹
NL	Stichting van de Arbeid (StvdA)	Bipartite	Cross-sectoral, acting as a national-level negotiation forum and advisory organisation	Agreement ¹⁰²	CNV Vakmensen, FNV, VCP	VNO-NCW, LTO

⁹⁹ Law on the Social and Economic Council (*Wet op de Sociaal-Economische Raad*), available at <https://wetten.overheid.nl/BWBR0002058/2015-01-01>

¹⁰⁰ The union is cross-sectoral and has a total of 163,300 members (RTL Nieuws, 2021). It represents the interests of professionals and managerial staff. It is not involved in collective bargaining in the woodworking sector (see <https://www.vcp.nl/english/>).

¹⁰¹ The organisation represents over 35,000 agricultural entrepreneurs and employers. It covers a wide range of subsectors in agriculture, such as arable farming, dairy farming, flower bulb cultivation, greenhouse horticulture, tree cultivation and pig farming. It is not involved in collective bargaining in the woodworking sector (see <https://www.lto.nl/over-lto/english/>).

¹⁰² Available at <https://www.stvda.nl/nl/stichting-van-de-arbeid/geschiedenis>

Representativeness of the European social partner organisations: Woodworking sector

Member State	Body	Type	Areas of responsibility	Method of establishment	Trade unions	Employer organisations
RO	Sectoral committee for forestry, logging and woodworking, furniture (Comitetul Sectorial Silvicultură, Exploatarea și Prelucrarea Lemnului, Industria Mobilei, CSSEPLIM)	Bipartite	Forestry, logging, and woodworking and furniture	Agreement	FSLIL	Romanian Furniture Manufacturers' Association (APMR), ASFOR
SK	Economic and Social Council (HSR)	Tripartite	All relevant issues concerning the sector, including mainly wages and employment and working conditions	Statutory	OZ DLV, through its membership of the KOZ SR	ZSD SR, through its membership of the AZZZ SR

Source: Network of Eurofound Correspondents, 2021

2.10. Overview of multisectoralism

Table 25 summarises the multisectoralism presented in detail for each trade union in Table 26 and for each employer organisation in Table 27. Clearly, multisectoralism is strongest with the furniture sector, both in terms of the number of organisations organising in both woodworking and furniture and in terms of the number of Member States where this kind of bisectoralism appears. Among the 66 woodworking sector trade unions, 54 (82%) also organise workers in the furniture sector, in 26 of the 27 Member States. Among the 71 woodworking sector employer organisations, 41 (58%) also represent furniture companies, in 23 Member States. Multisectoralism with the construction and paper sector is less frequent, though still significant. Details of the multisectoral membership domain of each of the organisations are presented in Tables 26 and 27.

Table 25: Trade unions and employer organisations covering woodworking and other sectors in the EU27, 2021

Sectors organised by national-level woodworking sector social partners	Trade unions		Employer organisations	
	Trade unions	Member States with a trade union	Employer organisations	Member States with an employer organisation
Furniture	54	26	41	23
Construction	38	16	24	17
Paper	24	16	14	11
Packaging	22	13	17	10
Energy	24	11	12	11
Transport	20	11	9	7

Representativeness of the European social partner organisations: Woodworking sector

Table 26: Multisectoralism of trade unions in the woodworking sector, 2020

Member State	Trade union	Affiliation to the EFBWW	Furniture	Construction	Paper	Packaging	Energy (electricity, bioenergy)	Transport	Other sectors or their workers/organisations
EU27	66	36 (+ 1)	54	38	24	22	24	20	
Number of Member States	26		26	16	16	13	11	11	
AT	GBH								
AT	GPA								All white-collar workers
BE	(ACV-CSC) BIE								
BE	(ABVV-FGTB) ACCG								
BE	ACLVB-CGSLB								
BG	BFTOFWPI								Forestry, pulp and paper
CY	Oikodomoi-PEO								Extractive industries
CY	OOIM-SEK								Extractive industries
CZ	OS DLV								Production of musical instruments, water supply, forestry and logging, production of hygienic equipment, vocational schools, etc.
CZ	ZO Kronospan								
CZ	ZO Pila Paskov								
CZ	ZO Stora Enso Wood Products								
DE	IG Metall								Furniture, textile, automotive, metal and electric
DK	CO-industri								Skilled and unskilled workers in a large part of the private and public sectors
DK	3F								Skilled and unskilled wage earners in many industries in both public and private sectors, with the largest groups being workers in industry, construction and transport
EE	EMTAÜ								
EL	OOSEE								
ES	UGT – FICA								
ES	CCOO del Hábitat								
ES	ELA-Industria eta Eraikuntza								
FI	YTN								A wide range of sectors, including banking, information and communications technology, chemicals, extractive industries, etc.
FI	Pro								A wide range of sectors, including logistics, aviation, technology, chemicals, etc.
FI	Teollisuusliitto								Other manufacturing sectors

Representativeness of the European social partner organisations: Woodworking sector

FI	Sähköliitto								Food and drink, chemicals, technological, etc.
FR	FNCB-CFDT								Extractive industries, cement industry, materials trading sector, cement manufacturing industry, wood industry, tiles and bricks sector, ceramics sector, heating and air conditioning equipment sector, camping industry, brush-making sector, etc., and architects, building economists and surveyors
FR	FNSCBA-CGT								Cement sector and architects
FR	FG-FO								Ceramics and cement
FR	FIBOPA CFE-CGC								
FR	BATI-MAT-TP CFTC								Water, ceramics, and tiles and bricks sectors; surveyors; and architectural firms
HR	SSH								
HR	HRSINDSUM								
HU	MEDOSZ								Agriculture, water and forestry
HU	EFDSZ								Forestry
HU	ÉFÉDOSZSZ								Manufacture of other non-metallic mineral products
HU	MOFA								
IE	SIPTU								
IE	Fórsa								Public service
IE	Connect								
IT	Fillea – CGIL								
IT	Filca – CISL								
IT	Feneal – UIL								
LT	LBMAJDPS								Extraction of peat
LT	KAMDS								n.d.
LU	Syndicat Bois, Caoutchouc, Céramique, Chimie, Ciment, Papier, Plastique, Textiles et Verre de l'OGB-L								Rubber, ceramics, chemicals, cement, plastic, textiles and glass
LU	LCGB-Indusid								Steel
LV	LMNA								
MT									None
NL	CNV Vakmensen								Cross-sectoral trade union representing workers in all sectors in the Netherlands

¹⁰³ Might have members.

Representativeness of the European social partner organisations: Woodworking sector

NL	FNV								Cross-sectoral trade union representing workers in all sectors in the Netherlands
PL	SBiPD NSZZ 'Solidarność'								Manufacturing of building materials
PL	ZZ 'Budowlani'								Cooperative housing, manufacturing building materials, property management, municipal utilities, forestry, national parks
PL	SBDiOŚ NSZZ 'Solidarność'-80							104	Forestry, manufacturing of building materials, municipal utilities
PT	Feviccom								Manufacturing in the ceramics, cement and glass industries; construction; and extraction and transformation of marble, granite and cork
PT	Sindeq								Automotive manufacturing, commerce (chemical products), textiles and shoe manufacturing
PT	Setaccop								Cement, ceramics and ornamental rocks
PT	SOCN								
PT	Sindicato dos Operários Corticeiros do Distrito de Portalegre								
PT	SINDCES								Service workers in all sectors
RO	FSLIL								Logging (NACE 0220)
RO	Forestar Tarcău								
SE	GS								Workers in the graphical sector
SE	Unionen								All private-sector workers
SE	Ledarna								All managerial staff
SE	Sveriges Ingenjörer								All engineers
SI	SLGS (Sinles)								
SI	KNSS Independence								Metal, postal services, chemistry, leather and utilities
SK	OZ DLV								Forestry and water management

Notes: Orange shading denotes membership of the EFBWW (yellow indicates indirect membership), green shading indicates a positive answer and grey shading denotes company-level trade unions. n.d., no data.

Source: Network of Eurofound Correspondents, 2021

¹⁰⁴ Eco-friendly public transport in cities.

Representativeness of the European social partner organisations: Woodworking sector

Table 27: Multisectoralism of employer organisations in the woodworking sector, 2020

Member State	Employer organisation	Affiliation to CEI-Bois	Furniture	Construction	Paper	Packaging	Energy (electricity, bioenergy)	Transport	Other sectors
EU27	71	16 (+ 1)	41	24	14	17	12	9	
Number of Member States			23	17	11	10	11	7	
AT	FVHI								Skis
AT	BITH								
AT	BIHB	n.d.							
BE	Belgische Houtconfederatie								
BE	Fedustria								Upholstery
BE	Houtunie								Upholstery
BG	BCWFI								
CY	PASYVEX								
CZ	ALDP								
CZ	SZDP								NACE 02, forestry, secondary schools
DE	HDH								Plastic manufacturing, producing musical instruments
DE	VHI								Service-related businesses (suppliers and consultants can also become members of the association)
DE	GD Holz		n.d.	n.d.	n.d.	n.d.	n.d.	n.d.	
DE	DeSH		n.d.	n.d.	n.d.	n.d.	n.d.	n.d.	
DK	DTI								
DK	TMI								
DK	DI								Many
DK	DHV								
EE	EMPL								Cellulose manufacturing
EE	EPML								Manufacturing, machinery, IT, education

Representativeness of the European social partner organisations: Woodworking sector

EL	POVSKX								
EL	PSX								
ES	ANFP								
ES	UNEmadera								
ES	ANFTA								
ES	Aefcon								
ES	AEIM								
ES	FEIM								
ES	Cenfim								Bathroom equipment, lighting and electrical components, painting
ES	Asecor								
ES	Aecork								
FI	Sahateollisuus ry		n.d.	n.d.	n.d.	n.d.	n.d.	n.d.	
FI	Metsäteollisuus ry								
FI	PTY								
FR	UIPP								
FR	UIPC								Layout, manufacture of veneers and decorative wood veneer panels
FR	FNB								Logging, timber trade, export
FR	SEILA								
FR	SIEL GROW								
FR	FTF								
FR	UFME								
FR	UICB								
FR	SEFB								
HR	HUP UDPI								
HR	DK								
HU	FAGOSZ								Shipping, commerce
HU	Fabunio								Textile, metals, commerce, IT, design
IE	IWFMN								

Representativeness of the European social partner organisations: Woodworking sector

IT	FLA								
IT	Unital Confapi								
IT	CNA Produzione								
IT	Confartigianato Legno e Arredo								
IT	Casartigiani								All crafts
IT	CLAAI								All crafts
LT	LM								Education
LU	FEDIL								Industrial sector in general
LV	LKF					105			Forestry
MT	MEA								Manufacturing; education; wholesale retail and other commercial services; aviation; maritime and transport; health and professional services; hospitality; tourism and travel; banking, insurance and financial services; information and communications technology and gaming; parastatal and government authorities; construction, electrical, engineering and metal
MT	CoC								Importers, distributors and retailers: healthcare business sector; professional community lead pharmacists; wines, spirits, beverages and tobacco business sector; manufacturers and other economic activities; electrical and electronics business sector; food and beverage processors business sector; medical cannabis business sector; plastics and rubber manufacturers Service providers: care home operators, business sector, employment agencies business sector, financial services business sector, information and communications technology business sector, logistics business sector, shipping and bunkering, tourism business sector, virtual financial assets agents, yachting services business sector
NL	EPV								EPV has a number of 'extraordinary members' that are not producers of packaging or pallets but rather importers of the same products. They belong to the same sector (NACE 16) and are represented by the VVNH.

¹⁰⁵ Wood packaging.

Representativeness of the European social partner organisations: Woodworking sector

NL	NBvT								
NL	VVNH								Wholesale of wood and board (under NACE 46.7.3)
PL	SPPD								Research institutes, manufacturers of epoxy resin and sandpaper
PT	AIMMP								Export, import and distribution of timber and derived products
PT	APIMA								Home textiles, cutlery and crockery, and decorations
PT	APCOR								
RO	ASFOR								
RO	APPR (RFOA)								
SE	TMF								
SE	Skogsindustrierna								
SI	GZS-ZLPI								
SI	ZDS								All sectors
SK	ZSD SR								

Notes: Orange shading denotes membership of CEI-Bois (yellow indicates indirect membership) and green shading denotes a positive answer. Organisations in bold are business associations. IT, information technology; n.d., no data.

Source: Network of Eurofound Correspondents, 2021

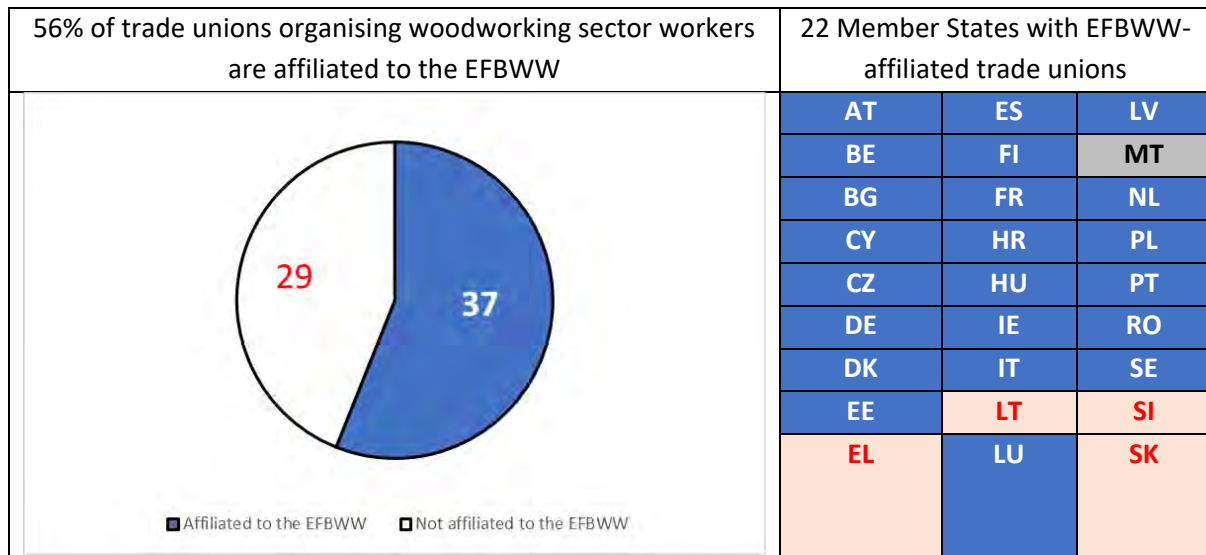
3. European level of interest representation

This chapter assesses the representativeness of the social partners at European level as follows. First, the membership strengths of the EFBWW and CEI-Bois are analysed, based on the presence of national affiliates in each of the 27 EU Member States. Second, the capacity of the EFBWW and CEI-Bois to negotiate on behalf of their national affiliates is determined, by looking at their statutes and existing arrangements with national affiliates. Third, the limits of the collective representativeness of the European social partners are assessed in two ways: through the national sectoral organisations not represented in the woodworking sector ESSDC, and through an assessment of the representativeness of other EU-level organisations in the woodworking sector.

3.1. Representativeness of the EFBWW

The EFBWW is affiliated to the European Trade Union Confederation. It represents workers in the building, woodworking and forestry industries and related industries across Europe.

Figure 11: Number of trade unions in the woodworking sector affiliated to the EFBWW, 2019–2020



Notes: In the countries shaded in blue, at least one woodworking sector trade union is affiliated to the EFBWW. In the countries shaded in red, there is at least one woodworking sector trade union but none is affiliated to the EFBWW. For Malta, shaded in grey, there are no woodworking sector trade unions, as hardly any sectoral activities are conducted there.

Source: Network of Eurofound Correspondents, 2021

Of the 66 national trade unions active in the woodworking sector (including 5 company-level trade unions), 37, from 22 countries, are members of the EFBWW (56%) (Figure 11). In Malta, there are no woodworking sector trade unions. In Greece, Lithuania, Slovakia and Slovenia there are woodworking sector trade unions but none of them is affiliated to the EFBWW. In Denmark, 3F is not a direct member of the EFBWW but is affiliated through CO-industri. 3F represents CO-industri in the EFBWW. If we consider membership data, if available, the EFBWW’s affiliates represent some 111,400 workers out of around 135,800 unionised workers in the woodworking industry (see Section 2.2), or 82% of all sectoral union members. Based on the available information, which is not complete, the national trade

Representativeness of the European social partner organisations: Woodworking sector

unions affiliated to the EFBWW represent more than 14% of the sectoral workforce. The EFBWW has members in 22 Member States.

In 19 of the 26 Member States with sector-related trade unions, the trade union with the most members in the woodworking industry is affiliated to the EFBWW (Tables 28 and 29). All except one of the members of the EFBWW (SBDiOŚ NSZZ ‘Solidarność’-80 in Poland) engage in collective bargaining, and 35 take part in some sort of social consultation, mostly on an ad hoc basis (see Section 2.3).

Table 28: Sector-related trade unions affiliated to the EFBWW

Member State	Trade unions affiliated to the EFBWW for their members in the woodworking sector	Trade unions affiliated to the EFBWW, but not for their members in the woodworking sector	Trade unions not affiliated to the EFBWW	Is the trade union with the most members in the sector affiliated to the EFBWW?
EU27				Yes = 19 No = 7
AT	GBH		GPA	Yes
BE	(ACV-CSC) BIE, ACCG, ACLVB-CGSLB			Yes
BG	BFTOFWPI			Yes
CY	OOIM-SEK		Oikodomoi-PEO	No
CZ	OS DLV		ZO Kronospan, ¹⁰⁶ ZO Pila Paskov ¹⁰⁷ ZO Stora Enso Wood Products ¹⁰⁸	Yes
DE	IG Metall			Yes
DK	CO-industri, 3F ¹⁰⁹			Yes
EE	EMTAÜ			Yes
EL			OOSEE	No
ES	UGT – FICA, CCOO del Hábitat, ELA-Industria eta Eraikuntza			Yes
FI	Pro, Teollisuusliitto		YTN, Sähköliitto	Yes
FR	FNCB-CFDT, FNSCBA-CGT, FG-FO		FIBOPA CFE-CGC, BATI-MAT-TP CFTC	Yes
HR	HRSINDSUM		SSH	Yes
HU	ÉFÉDOSZSZ		MEDOSZ, EFDSZ, MOFA ¹¹⁰	No
IE	SIPTU		Fórsa, Connect	Yes

¹⁰⁶ Company-level trade union.

¹⁰⁷ Company-level trade union.

¹⁰⁸ Company-level trade union.

¹⁰⁹ 3F is not a direct member but is affiliated through CO-industri. 3F represents CO-industri in the EFBWW.

¹¹⁰ Company-level trade union.

Representativeness of the European social partner organisations: Woodworking sector

Member State	Trade unions affiliated to the EFBWW for their members in the woodworking sector	Trade unions affiliated to the EFBWW, but not for their members in the woodworking sector	Trade unions not affiliated to the EFBWW	Is the trade union with the most members in the sector affiliated to the EFBWW?
IT	Fillea – CGIL, Filca – CISL, Feneal – UIL			Yes
LT			LBMA, DPS, KAMDS	No
LU	Syndicat Bois, Caoutchouc, Céramique, Chimie, Ciment, Papier, Plastique, Textiles et Verre de l'OGB-L; LCGB-Indusid			Yes
LV	LMNA			Yes
MT	None			
NL	CNV Vakmensen, FNV			Yes
PL	SBiPD NSZZ 'Solidarność', ZZ 'Budowlani', SBDiOŚ NSZZ 'Solidarność'-80			Yes
PT	Setaccop		Feviccom, Sindeq, SOCN, Sindicato dos Operários Corticeiros do Distrito de Portalegre, SINDCES	No
RO	FSLIL		Forestar Tarcău ¹¹¹	Yes
SE	GS, Unionen		Ledarna, Sveriges Ingenjörer	Yes
SI			SLGS (Sinles), KNSS Independence	No
SK			OZ DLV	No

Source: Network of Eurofound Correspondents, 2021

¹¹¹ Company-level trade union.

Representativeness of the European social partner organisations: Woodworking sector

Table 29: Sector-related trade unions affiliated to the EFBWW: coverage and rankings

Member State	Trade union	Activities covered	Types of workers covered	Sizes covered	Membership strength (1 is the largest, 2 is the second largest, and so on)
AT	GBH	All	Blue collar	All	1
BE	(ACV-CSC) BIE	All	All	All	1
BE	(ABVV-FGTB) ACCG	All	Blue collar	All	2
BE	ACLVB-CGSLB	All	All	All	3
BG	BFTOFWPI	All except manufacture of builders' carpentry and manufacture of containers	Blue collar, white collar	≥ 50	1
CY	OOIM-SEK	All	All	≤ 49	2
CZ	OS DLV	Sawmilling and planing, manufacture of containers, manufacture of engineered wood products (GLULAM)	All	All	1
DE	IG Metall	All	All	All	1
DK	CO-industri	All	Blue collar, white collar	All	1
DK	3F	All	Blue collar	All	1 ¹¹²
EE	EMTAÜ	Sawmilling and planing	All	All	1
ES	UGT – FICA	All	All	All	2
ES	CCOO del Hábitat	All	All	All	1
ES	ELA-Industria eta Eraikuntza	All	All	All	1 ¹¹³
FI	Pro	All	White collar, managerial staff	All	2

¹¹² Member of the organisation CO-industri, which is the largest trade union association in this study. 3F is the largest standalone trade union in the woodworking sector and in Denmark overall.

¹¹³ The largest trade union in the Basque Country.

Representativeness of the European social partner organisations: Woodworking sector

Member State	Trade union	Activities covered	Types of workers covered	Sizes covered	Membership strength (1 is the largest, 2 is the second largest, and so on)
FI	Teollisuusliitto	All	Blue collar	All	1
FR	FNCB-CFDT	All except manufacture of engineered wood products (GLULAM)	All	All	1
FR	FNSCBA-CGT	Sawmilling and planing, manufacture of builders' carpentry, manufacture of engineered wood products (GLULAM)	All	All	2
FR	FG-FO	n.d.	All	All	3
HR	HRSINDSUM	Manufacture of other wood products	Blue collar, white collar	≥ 50	1 ¹¹⁴
HU	ÉFÉDOSZSZ	Manufacture of panels, manufacture of parquet	Blue collar, white collar	10–249	3
IE	SIPTU	Sawmilling and planing, manufacture of panels, manufacture of containers, manufacture of other wood products	Blue collar	10–49	1 ¹¹⁵
IT	Fillea – CGIL	All	All	All	1
IT	Filca – CISL	All	Blue collar, white collar	All	2
IT	Feneal – UIL	All	Blue collar, white collar	All	3
LU	Syndicat Bois, Caoutchouc, Céramique, Chimie, Ciment,	Sawmilling and planing, manufacture of panels,	Blue collar, white collar	n.d.	1

¹¹⁴ The only trade union in the public sector.

¹¹⁵ Information is probably correct, but is based on assumptions.

Representativeness of the European social partner organisations: Woodworking sector

Member State	Trade union	Activities covered	Types of workers covered	Sizes covered	Membership strength (1 is the largest, 2 is the second largest, and so on)
	Papier, Plastique, Textiles et Verre de l'OGB-L	manufacture of containers, manufacture of builders' carpentry			
LU	LCGB-Indusid	Sawmilling and planing, manufacture of panels, manufacture of containers, manufacture of builders' carpentry	Blue collar, white collar	n.d.	2
LV	LMNA	All except manufacture of parquet	All	≥ 10	1
NL	CNV Vakmensen	All	All	All	2
NL	FNV	All	All	All	1
PL	SBiPD NSZZ 'Solidarność'	Sawmilling and planing, manufacture of panels, manufacture of builders' carpentry, manufacture of other wood products	All	≥ 50	1
PL	ZZ 'Budowlani'	All except manufacture of engineered wood products (GLULAM)	All	≥ 50	2
PL	SBDiOŚ NSZZ 'Solidarność'-80	Manufacture of panels	All	≥ 250	3
PT	Setaccop	n.d.	Blue collar, white collar	All	4
RO	FSLIL	All	Blue collar, white collar	≥ 10	1
SE	GS	All	Blue collar	All	1
SE	Unionen	All	White collar, managerial staff	All	2

Note: Due to concerns about the reliability and comparability of the data, information regarding the ranking of organisations needs to be interpreted with caution. GLULAM, glued laminated timber; n.d., no data.

Source: Network of Eurofound Correspondents, 2021

Representativeness of the European social partner organisations: Woodworking sector

In 20 Member States, either the largest or the second largest trade union in the sector are affiliated to EFBWW (see Table 30).

Out of 37 EFBWW members in the woodworking sector, 21 cover all subsectors in the sector (57%) and 3 cover all except one subsector. Three trade unions cover only one subsector. Sawmilling and the planing of wood is covered by 32 trade unions (86%), manufacture of panels by 31 trade unions (84%) and manufacture of parquet by 25 trade unions (68%). Manufacture of builders' carpentry is covered by 28 trade unions (76%), manufacture of containers by 28 trade unions (76%), manufacture of other wood products by 28 trade unions (76%) and manufacture of engineered wood products (glued laminated timber) by 25 trade unions (68%) (see Table 31).

A total of 19 trade unions (51%) cover all types of workers, and 10 trade unions cover blue-collar and white-collar workers. Six trade unions cover only blue-collar workers and two trade unions cover only white-collar workers and managerial staff.

A total of 25 trade unions (68%) cover all size groups, and four trade unions cover enterprises with 50 or more employees.

Table 30: Overview of the representativeness of trade unions in the woodworking sector

Countries where the largest trade union is affiliated to the EFBWW	AT, BE, BG, CZ, DE, DK, EE, ES, FI, FR, HR, IE, IT, LU, LV, NL, PL, RO, SE (19)
Countries where the second largest trade union is affiliated to the EFBWW	BE, CY, DK, ES, LU, NL, SE (7)
Countries where trade unions affiliated to the EFBWW cover all types of activities in the furniture sector (all NACE codes)	AT, BE, CY, DE, DK, ES, FI, FR, IT, NL, RO, SE (12)
Countries where the most representative trade union affiliated to the EFBWW covers sawmilling and planing	AT, BE, BG, CZ, DE, DK, EE, ES, FI, FR, IE, IT, LU, LV, NL, PL, RO, SE (18)
Countries where the most representative trade union affiliated to the EFBWW covers the manufacture of panels	AT, BE, BG, DE, DK, ES, FI, FR, IE, IT, LU, LV, NL, PL, RO, SE (16)
Countries where the most representative trade union affiliated to the EFBWW covers the manufacture of parquet	AT, BE, BG, DE, DK, ES, FI, FR, IT, NL, RO, SE (12)
Countries where the most representative trade union affiliated to the EFBWW covers the manufacture of builders' carpentry	AT, BE, DE, DK, ES, FI, FR, IT, LU, LV, NL, PL, RO, SE (14)
Countries where the most representative trade union affiliated to the EFBWW covers the manufacture of containers	AT, BE, CZ, DE, DK, ES, FI, FR, IE, IT, LU, LV, NL, RO, SE (15)
Countries where the most representative trade union affiliated to the EFBWW covers the manufacture of other wood products	AT, BE, BG, DE, DK, ES, FI, FR, HR, IE, IT, LV, NL, PL, RO, SE (16)
Countries where the most representative trade union affiliated to the EFBWW covers the manufacture of engineered wood products (glued laminated timber)	AT, BE, BG, CZ, DE, DK, ES, FI, IT, LV, NL, RO, SE (13)
Countries where trade unions affiliated to the EFBWW cover all types of workers in the woodworking sector	BE, CY, CZ, DE, EE, ES, FI, FR, IT, LV, NL, PL, SE (13)
Countries where trade unions representing workers in the woodworking sector are not affiliated to the EFBWW	AT, CY, FI, FR, EL, HR, HU, IE, LT, PT, SE, SI, SK (13) CZ, RO (companies) (2)

Source: Network of Eurofound Correspondents, 2021

Representativeness of the European social partner organisations: Woodworking sector

Table 31: Sector-related trade unions affiliated to the EFBWW: coverage and rankings

Member State	Trade union	Affiliation to the EFBWW	Sawmilling and planing	Manufacture of panels	Manufacture of parquet	Manufacture of builders' carpentry	Manufacture of containers	Manufacture of other wood products	Manufacture of engineered wood products (GLULAM)	Forestry (EFBWW)	Type of worker covered			Company size group				Rank in terms of size (1 is the largest, 2 is the second largest, and so on)
											Blue collar	White collar	Managerial staff	0-9	10-49	50-249	250+	
EU27	37	36 (+ 1)	32	31	25	28	28	28	25	20	35	31	21	26	30	32	32	
AT	GBH																	1
BE	(ACV-CSC) BIE																	1
BE	(ABVV-FGTB) ACCG																	2
BE	ACLVB-CGSLB																	3
BG	BFTOFWPI																	1
CY	OOIM-SEK																	2
CZ	OS DLV																	1
DE	IG Metall																	1
DK	CO-industri																	1
DK	3F	¹¹⁶																¹¹⁷
EE	EMTAÜ																	1
ES	UGT – FICA																	2

¹¹⁶ 3F is not a direct member but is affiliated through CO-industri. 3F represents CO-industri in the EFBWW.

¹¹⁷ Member of the organisation CO-industri, which is the largest trade union association in this study. 3F is the largest standalone trade union in the woodworking sector and in Denmark overall.

Representativeness of the European social partner organisations: Woodworking sector

Member State	Trade union	Affiliation to the EFBWW	Sawmilling and planing	Manufacture of panels	Manufacture of parquet	Manufacture of builders' carpentry	Manufacture of containers	Manufacture of other wood products	Manufacture of engineered wood products (GLULAM)	Forestry (EFBWW)	Type of worker covered			Company size group				Rank in terms of size (1 is the largest, 2 is the second largest, and so on)	
											Blue collar	White collar	Managerial staff	0-9	10-49	50-249	250+		
ES	CCOO del Hábitat																		1
ES	ELA-Industria eta Eraikuntza																		1 ¹¹⁸
FI	Pro																		2
FI	Teollisuusliitto																		1
FR	FNCB-CFDT																		1
FR	FNSCBA-CGT																		2
FR	FG-FO		n.d.	n.d.	n.d.	n.d.	n.d.	n.d.	n.d.										3
HR	HRSINDSUM																		1 ¹¹⁹
HU	ÉFÉDOSZSZ																		3
IE	SIPTU																		1 ¹²⁰
IT	Fillea – CGIL																		1
IT	Filca – CISL																		2
IT	Feneal – UIL																		3
LU	Syndicat Bois, Caoutchouc,													n.d.	n.d.	n.d.	n.d.		1

¹¹⁸ The largest trade union in the Basque Country.

¹¹⁹ The only trade union in the public sector.

¹²⁰ Information is probably correct, but is based on assumptions.

Representativeness of the European social partner organisations: Woodworking sector

Member State	Trade union	Affiliation to the EFBWW	Sawmilling and planing	Manufacture of panels	Manufacture of parquet	Manufacture of builders' carpentry	Manufacture of containers	Manufacture of other wood products	Manufacture of engineered wood products (GLULAM)	Forestry (EFBWW)	Type of worker covered			Company size group				Rank in terms of size (1 is the largest, 2 is the second largest, and so on)	
											Blue collar	White collar	Managerial staff	0-9	10-49	50-249	250+		
	C�ramique, Chimie, Ciment, Papier, Plastique, Textiles et Verre de l'OGB-L																		
LU	LCGB-Indusid												n.d.	n.d.	n.d.	n.d.			2
LV	LMNA																		1
NL	CNV Vakmensen																		2
NL	FNV																		1
PL	SBiPD NSZZ 'Solidarno�c'																		1
PL	ZZ 'Budowlani'																		2
PL	SBDIO� NSZZ 'Solidarno�c'-80																		3
PT	Setaccop		n.d.	n.d.	n.d.	n.d.	n.d.	n.d.	n.d.										4
RO	FSLIL																		1
SE	GS																		1
SE	Unionen																		2

Representativeness of the European social partner organisations: Woodworking sector

Notes: Due to concerns about the reliability and comparability of the data, information regarding the ranking of organisations needs to be interpreted with caution. Orange shading denotes membership of the EFBWW (yellow indicates indirect membership) and green shading denotes a positive answer. Information on the coverage of the forestry sector by EFBWW member unions is marked in blue. These data were provided directly by the EFBWW and have not been cross-checked by the Network of Eurofound Correspondents, whereas the other data in the table have. The EFBWW reported that its affiliated trade unions in Finland, France, Latvia and Sweden organise the forestry sector. As this information is not complete and could not be cross-checked, it is not included in the scope of this study. GLULAM, glued laminated timber; n.d., no data.

Source: Network of Eurofound Correspondents, 2021

3.2. Sector-related trade unions not affiliated to the EFBWW

Table 32 shows the national sector-related trade unions that are not affiliated to the EFBWW. In total, there are 29 such trade unions, from 15 Member States (around 44% of all sectoral trade unions in the EU27). These include five company-level trade unions, in Czechia, Hungary and Romania.

Table 32: Sector-related trade unions not affiliated to the EFBWW: coverage and rankings

Member State	Trade union	Activities covered	Types of workers covered	Company size group	Rank based on size
AT	GPA	All	White collar, managerial staff	All	2
CY	Oikodomoi-PEO	All	All	1–49	1
CZ	ZO Kronospan	Manufacture of panels	All	≥ 250	
CZ	ZO Pila Paskov	Sawmilling and planing	All	≥ 250	
CZ	ZO Stora Enso Wood Products	Sawmilling and planing	All	≥ 250	
EL	OOSEE	All	Blue collar	All	1
FI	YTN	All	White collar, managerial staff	All	3
FI	Sähköliitto	n.d.	n.d.	n.d.	n.d.
FR	FIBOPA CFE-CGC	n.d.	White collar, managerial staff	All	5
FR	BATI-MAT-TP CFTC	All	All	All	4
HR	SSH	Sawmilling and planing, manufacture of panels, manufacture of parquet, manufacture of containers, manufacture of other wood products	Blue collar, white collar	All	1 ¹²¹
HU	MEDOSZ	Sawmilling and planing, manufacture of panels, manufacture of engineered wood products (GLULAM)	All	≥ 50	1
HU	EFDSZ	Sawmilling and planing, manufacture of parquet, manufacture of containers, manufacture of engineered wood products (GLULAM)	Blue collar, white collar	≥ 50	2
HU	MOFA	Manufacture of panels, manufacture of engineered wood products (GLULAM)	Blue collar	50–249	
IE	Fórsa	Sawmilling and planing, manufacture of other wood products	White collar, managerial staff	≥ 250	2/3
IE	Connect	Sawmilling and planing, manufacture of panels,	Blue collar	10–249	2/3

¹²¹ The only trade union in the private sector.

Representativeness of the European social partner organisations: Woodworking sector

		manufacture of containers, manufacture of other wood products			
LT	LBMAJDPS	Manufacture of panels, manufacture of builders' carpentry	All	≥ 50	1
LT	KAMDS	Manufacture of builders' carpentry	Blue collar, white collar	≥ 250	2 ¹²²
PT	Fevicom	n.d.	Blue collar, white collar	All	1
PT	Sindeq	n.d.	Blue collar, white collar	All	3
PT	SOCN	Manufacture of other wood products	Blue collar, white collar	All	2
PT	Sindicato dos Operários Corticeiros do Distrito de Portalegre	Manufacture of other wood products	Blue collar, white collar	All	Small
PT	SINDCES	All	White collar	All	Small
RO	Forestar Tarcău	Sawmilling and planing	Blue collar, white collar	50–249	
SE	Ledarna	All	Managerial staff	All	n.d.
SE	Sveriges Ingenjörer	All	White collar, managerial staff	All	n.d.
SI	SLGS (Sinles)	All	All	1–249	1
SI	KNSS Independence	All	All	1–249	2
SK	OZ DLV	Sawmilling and planing, manufacture of builders' carpentry, manufacture of panels, manufacture of other wood products, manufacture of engineered wood products (GLULAM)	Blue collar, white collar	50–249	1

Notes: Due to concerns about the reliability and comparability of the data, information regarding the ranking of organisations needs to be interpreted with caution. Grey shading denotes company-level trade unions. GLULAM, glued laminated timber; n.d., no data.

Source: Network of Eurofound Correspondents, 2021

Ten sector-related trade unions that are not affiliated to the EFBWW cover all subsectors (Table 33). Seven trade unions cover only one subsector, with an additional six covering up to four subsectors. Nine trade unions cover all types of workers, nine cover blue-collar and white-collar workers, and five cover white-collar workers and managerial staff. Four trade unions cover only blue-collar workers, and one trade union each represents only white-collar workers and only managerial staff.

Eight trade unions not affiliated to the EFBWW are considered the largest in the sector.

¹²² Possibly the second largest.

Representativeness of the European social partner organisations: Woodworking sector

Table 33: Sector-related trade unions not affiliated to the EFBWW, by activities covered

Member State	Trade union	Sawmilling and planing	Manufacture of panels	Manufacture of parquet	Manufacture of builders' carpentry	Manufacture of containers	Manufacture of other wood products	Manufacture of engineered wood products (GLULAM)	Type of worker covered			Company size group				Membership strength (1 is the largest, 2 is the second largest, 3 is the third largest, and so on)
									Blue collar	White collar	Managerial staff	0-9	10-49	50-249	250+	
EU27	29	20	18	13	14	14	17	15	22	24	15	17	18	23	22	
AT	GPA															2
CY	Oikodomoi-PEO															1
CZ	ZO Kronospan															
CZ	ZO Pila Paskov															
CZ	ZO Stora Enso Wood Products															
EL	OOSEE															1
FI	YTN															3
FI	Sähköliitto ¹²³															n.d.
FR	FIBOPA CFE-CGC	n.d.	n.d.	n.d.	n.d.	n.d.	n.d.	n.d.								5
FR	BATI-MAT-TP CFTC															4
HR	SSH															1 ¹²⁴
HU	MEDOSZ															1
HU	EFDSZ															2
HU	MOFA															
IE	Fórsa															2/3

¹²³ Information on subsectors covered by this trade union is probably correct, but is based on assumptions.

¹²⁴ The only trade union in the private sector.

Representativeness of the European social partner organisations: Woodworking sector

IE	Connect															2/3
LT	LBMA DPS															1
LT	KAMDS															2 ¹²⁵
MT	None															
PT	Fevicom	n.d.	n.d.	n.d.	n.d.	n.d.	n.d.	n.d.								1
PT	Sindeq	n.d.	n.d.	n.d.	n.d.	n.d.	n.d.	n.d.								3
PT	SOCN															2
PT	Sindicato dos Operários Corticeiros do Distrito de Portalegre															Small
PT	SINDCES															Small
RO	Forestar Tarcău															
SE	Ledarna															n.d.
SE	Sveriges Ingenjörer															n.d.
SI	SLGS (Sinles)															1
SI	KNSS Independence															2
SK	OZ DLV															1

Notes: Due to concerns about the reliability and comparability of the data, information regarding the ranking of organisations needs to be interpreted with caution. Green shading denotes a positive answer and grey shading denotes company-level trade unions. n.d., no data.

Source: Network of Eurofound Correspondents, 2021

¹²⁵ Possibly the second largest.

3.3. Representativeness of CEI-Bois

CEI-Bois represents the woodworking sector at European level.

In the time frame studied, 16 employer organisations organising companies in the woodworking sector were directly affiliated to CEI-Bois¹²⁶ in the 27 EU Member States.¹²⁷ CEI-Bois had directly affiliated employer organisations in 13 Member States. These Member States are marked in blue in Figure 12 below. In 2023, an additional employer organisation – the Wood Processors Association,¹²⁸ from Lithuania – joined. Lithuania is therefore marked in green in Figure 12 below. With this additional member organisation, CEI-Bois has 17 affiliated employer organisations as of 2023 (23%).

In addition, four European associations are affiliated to CEI-Bois. These are:

- the European Timber Trade Federation (ETTF)¹²⁹ (since 2018)
- the European Organisation of the Sawmill Industry (EOS)¹³⁰
- the European Federation of Wooden Pallet and Packaging Manufacturers (FEFPEB)¹³¹
- the European Institute for Wood Preservation (WEI-IEO)¹³²

The national member organisations of these associations are included in Table 34. They are all indirectly represented in CEI-Bois. CEI-Bois has indirect member organisations in six Member States, marked in yellow in Figure 12.

¹²⁶ Not including Assolegno, whose affiliation to CEI-Bois could not be confirmed within the scope of the study because it was not reported as a member of CEI-Bois at the time of data collection.

¹²⁷ CEI-Bois reported also being affiliated to associations from Norway, Switzerland and the United Kingdom, bringing the total number of affiliated national associations in 2023 to 17, of which 14 are in the EU27.

¹²⁸ www.mpa.lt

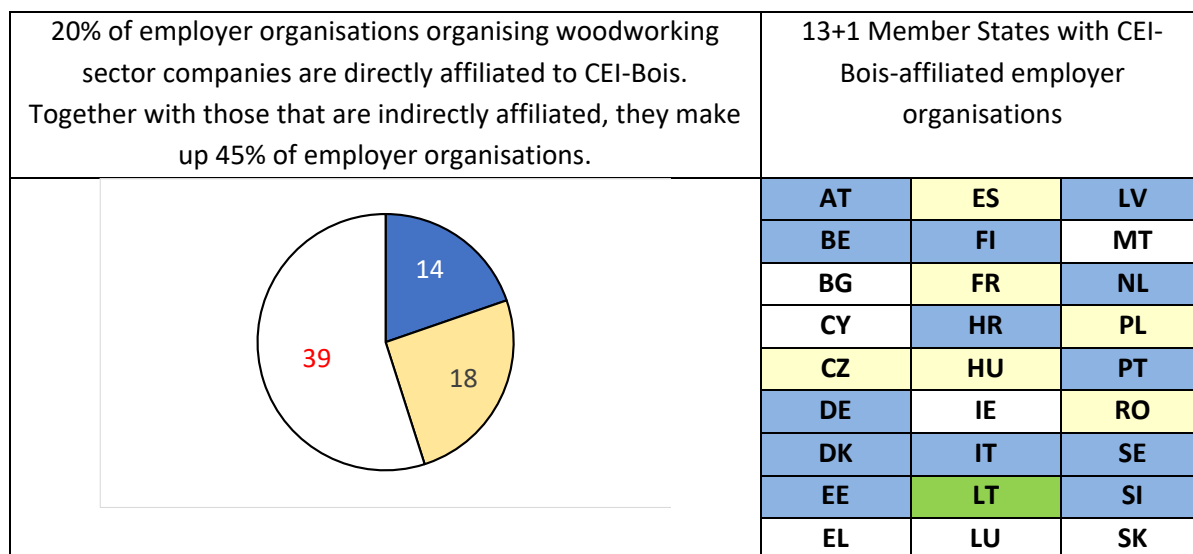
¹²⁹ <https://ettf.info/>

¹³⁰ <https://www.eos-oes.eu/>

¹³¹ <https://www.fefpeb.eu/about/over>

¹³² <https://wei-ieo.org/>

Figure 12: Number of employer organisations in the woodworking sector affiliated to CEI-Bois, 2019–2022



Notes: In the countries shaded in blue, at least one woodworking sector employer organisation is affiliated to CEI-Bois. In Lithuania, shaded in green, the Wood Processors Association joined CEI-Bois in 2023.

Source: Network of Eurofound Correspondents, 2021

There are sector-related employer organisations in all Member States. In 11 Member States, the employer organisations with the most members in the sector are affiliated to CEI-Bois.¹³³ CEI-Bois has directly affiliated organisations involved in collective bargaining in nine Member States; they are highlighted in blue in Table 34. In Croatia, Estonia and Latvia, CEI-Bois has directly affiliated organisations that are not involved in collective bargaining. In France, Italy and Romania, CEI-Bois has indirectly affiliated organisations involved in collective bargaining.

In 2022, CEI-Bois celebrated its 70th anniversary. A strategic change was put forward by the General Assembly of CEI-Bois and EOS in 2020, when it was decided that the two Brussels-based organisations would have deepened their cooperation, with the aim of:

- creating an indispensable bridge linking the woodworking industry value chain with European policymakers
- advocating the use of legally harvested wood as a strategic solution to challenges of climate change
- creating favourable legislation and policy conditions for enhancing the use of wood in construction and wood consumption within and outside the EU

In 2020, it was also decided that CEI-Bois and EOS should operate through a joint secretary general for the two organisations, and a new position, director of public affairs, was created with the intention of boosting their advocacy activities towards the European Commission and the European Parliament.

Information on the activities of CEI-Bois is available on the confederation’s website and in its annual activity report, published in November each year.

¹³³ This may be the case in 12 Member States, but could not be checked for Italy. The Italian member organisation Assolegno did not provide information for this study.

At the end of 2017, the European Panel Federation (EPF) and the European Parquet Federation (FEP) both left CEI-Bois while continuing to engage in ad hoc activities occasionally. In 2019, CEI-Bois published the joint statement 'COVID-19: To fight the corona pandemic, the European woodworking and furniture industries propose measures to protect workers' health, support economic activity and the sector's recovery' together with the other recognised European social partner for the woodworking sector (the EFBWW), the three recognised social partners for the furniture sector (the EFBWW, the European Furniture Industries Confederation (EFIC) and the European Furniture Manufacturers Federation (UEA)) and the sectoral social federations the EPF and EOS.

Very recently, CEI-Bois, together with the EPF and FEP and the European association representing the forestry value chain, co-signed a 'circular choices' campaign document (available on CEI-Bois's website). Moreover, the EPF still participates in the woodworking sector ESSDC as a guest invited by CEI-Bois.

In March 2021, the European wood-based sector launched the Wood Sector Alliance for the New European Bauhaus to establish an open platform that brings together its manifold stakeholders. CEI-Bois and its member EOS, the EPF, the EFBWW, Basajaun and WoodCircus (a Horizon 2020 project consortium) are active members of this initiative. The initiative aims to contribute to shaping a better and more sustainable future with beautiful, healthy and inclusive living spaces by promoting the creation of a sustainable, low-carbon built environment. The platform facilitates the sharing of good practices related to the circular economy and green buildings.

Representativeness of the European social partner organisations: Woodworking sector

Table 34: Sector-related employer organisations affiliated to CEI-Bois and its affiliated associations

Member State	Representative employer organisations affiliated to CEI-Bois	Affiliated organisations that are not considered representative	Employer associations not affiliated to CEI-Bois	Is the employer organisation with the most members in the sector affiliated to CEI-Bois?	Member organisations of EOS (sawmilling industry)	Member organisations of the ETTF	Member organisations of FEFPEB (timber packaging industry)	Member organisations of the WEI-IEO
Number of Member States	13 (AT, BE, DE, DK, FI, HR, IT, LT, LV, NL, PT, SE, SI)	2 (EE, HR)		11 (AT, BE, DE, DK, EE, FI, LV, NL, PT, SE, SI)	2 (FR, RO)	3 (ES, FR, IT)	6 (CZ, ES, FR, HU, IT, PL)	
AT	FVHI		BITH BIHB	Yes	FVHI		FVHI	
BE	Fedustria		Belgische Houtconfederatie, Houtunie	Yes	HoutInfoBois	Fedustria, Belgische Houtconfederatie	Fedustria	
BG			BCWFI	No				
CY			PASYVEX	No				
CZ			ALDP, SZDP	No			SYBA	
DE	HDH		VHI, GD Holz, DeSH	Yes	DeSH	GD Holz	HPE	
DK	TMI (which is part of DI)	DTI (which is part of TMI)	DHV	Yes	DI	Dansk Byggecentre, Dansk Traeforening	TMI	
EE		EMPL	EPML	Yes				
EL			POVSKX, PSX	No		Alpha Timber, PSX		
ES			ANFP, UNEmadera, ANFTA, Aefcon, AEIM, FEIM, Cenfim, Asecor, Aecork	No		AEIM	Faproma	
FI	Metsäteollisuus ry, PTY		Sahateollisuus ry	Yes	Sahateollisuus ry	Sahateollisuus ry		
FR			UIPP, UIPC, FNB, SEILA, SIEL GROW, FTF, UFME, UICB, SEFB	No	FNB	Le Commerce du Bois, ATIBT/ITTO	FNB (SYPAL), SEILA, SIEL GROW	

Representativeness of the European social partner organisations: Woodworking sector

Member State	Representative employer organisations affiliated to CEI-Bois	Affiliated organisations that are not considered representative	Employer associations not affiliated to CEI-Bois	Is the employer organisation with the most members in the sector affiliated to CEI-Bois?	Member organisations of EOS (sawmilling industry)	Member organisations of the ETTF	Member organisations of FEFPEB (timber packaging industry)	Member organisations of the WEI-IEO
HR	Drvniklaster ¹³⁴	DK	HUP UDPI	No				
HU			FAGOSZ, Fabunio	No			Golden Pallet	
IE			IWFMN	No				
IT	Asselegno ¹³⁵		FLA, Unital Confapi, CNA Produzione, Confartigianato Legno e Arredo, Casartigiani CLAAI	No		FLA, FedercomLegno	FLA	
LT	Wood Processors Association (joined in 2023)		LM	No				
LU			FEDIL	No				
LV	LKF			Yes	Latvianwood		Upeslīči, Kronus, MTGA	
MT			MEA CoC	No				
NL	NBvT ¹³⁶		VVNH	Yes		VVNH	EPV ¹³⁷	
PL			SPPD	No			PGPOD	

¹³⁴ CEI-Bois reported that a cluster of companies from Croatia is affiliated to it. This cluster was not included in the scope of this study, as it is not considered a sectoral employer organisation, like HUP UDPI. Drvni Klaster is reported to be a business association, not involved in social dialogue or collective bargaining, and as such is not an employer organisation representing the affiliated companies as employers. More information on Drvni Klaster can be found at <http://www.drwniklaster.hr/>

¹³⁵ CEI-Bois reported that Asselegno, from Italy, is affiliated. This was not the case when the data for this study were collected, and can therefore not be confirmed in the scope of this study. More information on Asselegno can be found at <https://www.federlegnoarredo.it/it/federazione/associarsi/asselegno>

¹³⁶ VVNH is a member of the ETTF and as such is indirectly represented in CEI-Bois. The NBvT is a direct member of CEI-Bois. Both VVNH and NBvT are affiliated at national level to Centrum Hout, though Centrum Hout is not a member of CEI-Bois.

¹³⁷ Indirectly through FEFPEB.

Representativeness of the European social partner organisations: Woodworking sector

Member State	Representative employer organisations affiliated to CEI-Bois	Affiliated organisations that are not considered representative	Employer associations not affiliated to CEI-Bois	Is the employer organisation with the most members in the sector affiliated to CEI-Bois?	Member organisations of EOS (sawmilling industry)	Member organisations of the ETTF	Member organisations of FEFPEB (timber packaging industry)	Member organisations of the WEI-IEO
PT	AIMMP ¹³⁸		APIMA, APCOR	Yes			AIMMP	
RO			ASFOR, APPR (RFOA)	No	ASFOR			
SE	TMF, Skogsindustrierna			Yes	Svenskttra Forestindustries	Karnsund Wood Link	Skogsindustrierna	
SI	GZS-ZLPI, Sloles ¹³⁹		ZDS, GZS-ZLPI	Yes				
SK			ZSD SR	No				

Note: The information in this table related to indirect membership comes from the websites of the European associations affiliated to CEI-Bois. The cells shaded in green indicate direct membership of CEI-Bois, and the organisations highlighted in yellow are indirectly affiliated through European subsectoral organisations that are part of CEI-Bois. The organisations highlighted in blue are those that are involved in collective bargaining in the woodworking sector.

Source: Network of Eurofound Correspondents, 2021

¹³⁸ The European Timber Industries Confederation reported that AIMMP has not been affiliated to CEI-Bois since 2021. However, it remains a member of FEFPEB and as such is indirectly affiliated to CEI-Bois through FEFPEB.

¹³⁹ In Slovenia, the national sectoral employer organisation GZS-ZLPI was a member of CEI-Bois until 2021. In 2022, Sloles was created to represent the woodworking sector within the GZS-ZLPI and it joined CEI-Bois. In the scope of this study, no information was provided on the membership in the sector of Sloles or the status of this organisation in the Slovenian sectoral industrial relations landscape. CEI-Bois indicated that Sloles is more sector related than the GZS-ZLPI. More information on Sloles can be found at <https://www.sloles.eu/goals/>. At national level, Sloles remains a member of the GZS-ZLPI. Thus, some indirect link between CEI-Bois and GZS-ZLPI remains through Sloles.

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Nine of the organisations affiliated to CEI-Bois cover all subsectors of the woodworking sector, and another five cover five or more subsectors (Table 35). Two are specialised in only one subsector.

Sawmilling and the planing of wood is covered by 14 organisations, manufacture of panels by 14 organisations, manufacture of parquet by 13 organisations, manufacture of builders' carpentry by 16 organisations, manufacture of containers by 14 organisations, manufacture of other wood products by 14 organisations and manufacture of engineered wood products (glued laminated timber) by 10 organisations.

Table 35: Sector-related employer associations affiliated to CEI-Bois, by activities covered and ranking

Member State	Employer organisation	Activities covered	Membership strength (1 is the largest, 2 is the second largest, and so on)
AT	FVHI	All	1
BE	Fedustria	Manufacture of panels, manufacture of builders' carpentry, manufacture of other wood products	n.d., most likely the largest in the sector
DE	HDH	All	1
DK	DTI	Sawmilling and planing, manufacture of panels, manufacture of parquet, manufacture of builders' carpentry, manufacture of containers	3
DK	TMI	All	Largest business association
DK	DI	All	1
EE	EMPL	Sawmilling and planing, manufacture of panels, manufacture of builders' carpentry, manufacture of other wood products, manufacture of engineered wood products (GLULAM)	1
FI	Metsäteollisuus ry	Sawmilling and planing, manufacture of panels, manufacture of parquet, manufacture of builders' carpentry, manufacture of containers, manufacture of other wood products	1
FI	PTY	Sawmilling and planing, manufacture of parquet, manufacture of builders' carpentry, manufacture of containers, manufacture of other wood products	2
HR	DK	Sawmilling and planing, manufacture of panels, manufacture of parquet, manufacture of builders' carpentry, manufacture of containers, manufacture of other wood products	Only business association in the sector
LV	LKF	All	1
NL	EPV ¹⁴⁰	Manufacture of containers	3 or 4
NL	NBvT	Manufacture of builders' carpentry	Largest in subsector 16.23, and probably largest or second largest in the whole sector
PT	AIMMP	All	1

¹⁴⁰ Indirectly through FEFPEB.

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SE	TMF	All	1
SE	Skogsindustrierna	All	2
SI	GZS-ZLPI	All	1

Note: Due to concerns about the reliability and comparability of the data, information regarding the ranking of organisations needs to be interpreted with caution. GLULAM, glued laminated timber; n.d., no data.

Source: Network of Eurofound Correspondents, 2021

In 11 Member States, the largest or the second largest employer organisations in the woodworking sector are affiliated to CEI-Bois (Table 36).

Table 36: Direct and indirect representativeness of CEI-Bois in the woodworking sector

Countries where the largest employer organisation is affiliated to:	CEI-Bois	AT, BE, DE, DK, EE, FI, LV, NL, PT, SE, SI
Countries where the second largest employer organisation is affiliated to:	CEI-Bois	DK, EE, SE
Countries where the most representative employer organisation covering NACE 16.10 is affiliated to:	CEI-Bois	AT, BE, DK, EE, FI, LV, PT, SE, SI
	EOS	AT, BE, DK, LV, RO, SE
	ETTF	BE, IT, NL
Countries where the most representative employer organisation covering NACE 16.21 and 16.22 is affiliated to:	CEI-Bois	AT, BE, DK, EE, FI, LV, PT, SE, SI
	EOS	AT, BE, DK, FR, LV, RO
	ETTF	BE, IT
Countries where the most representative employer organisation covering NACE 16.23 is affiliated to:	CEI-Bois	AT, BE, DE, DK, EE, FI, LV, NL, PT, SE, SI
	EOS	AT, BE, DK, LV, RO
	ETTF	BE, ES, IT
Countries where the most representative employer organisation covering NACE 16.24 and 16.29 is affiliated to:	CEI-Bois	AT, BE, DE, DK, EE, FI, LV, NL, PT, SE, SI
	EOS	AT, BE, DK, LV
	ETTF	BE, ES, IT

Source: Network of Eurofound Correspondents, 2021

A total of 54 employer organisations in the sector are not affiliated to CEI-Bois. For nearly half of them (24 organisations), the ranking is not available. Twelve of them are ranked as the largest, with an additional three identified as the only employer organisation in the sector. Eight of them are ranked as the second largest. Fifteen of them cover all subsectors, and four cover six out of seven subsectors. Another 15 cover only one subsector, and another 11 cover two or three subsectors.

3.4. Sector-related employer organisations not directly affiliated to CEI-Bois

This study identified 55 sectoral employer organisations that are not directly affiliated to CEI-Bois, from 24 Member States. For Latvia only, no national associations were found that were not members of CEI-Bois. Among the 55 employer organisations not affiliated to CEI-Bois, 16 organisations were indirectly affiliated. They are marked in yellow in Table 37, and the far-right column includes the European association through which they are indirectly represented in CEI-Bois. This leaves 39 national associations not directly or indirectly affiliated to CEI-Bois, from 23 Member States. The four Member States with no other unaffiliated organisations are Finland, Latvia, Poland and Romania.

The 12 organisations marked in blue in Table 37 deserve special attention, as they are involved in woodworking sector collective bargaining but are not represented by CEI-Bois. Such unaffiliated organisations appear in seven Member States: Austria, Belgium, Italy, Portugal, Slovakia, Slovenia and Spain.

Table 37: Sector-related employer associations not affiliated to CEI-Bois, by activities covered and ranking

Member State	Employer organisation	Activities covered	Membership strength (1 is the largest, 2 is the second largest and 3 is the third largest)	Organisations through which employer organisations are directly affiliated to CEI-Bois
AT	BITH	All	2	
AT	BIHB	Manufacture of builders' carpentry	3	
BE	Belgische Houtconfederatie	All	n.d.	EOS, EuroPanels, FEFPEB
BE	Houtunie	Manufacture of panels, manufacture of builders' carpentry, manufacture of other wood products	n.d.	
BG	BCWFI	All	Only employer organisation in the sector	
CY	PASYVEX	Sawmilling and planing, manufacture of parquet, manufacture of builders' carpentry, manufacture of containers, manufacture of other wood products, manufacture of engineered wood products (glued laminated timber)	1	
CZ	ALDP	Sawmilling and planing, manufacture of panels	1	
CZ	SZDP	Sawmilling and planing, manufacture of panels, manufacture of builders' carpentry, manufacture of other wood products, manufacture of engineered wood products (glued laminated timber)	2	
DE	VHI (member of HDH)	Sawmilling and planing, manufacture of panels, manufacture of other wood products	n.d.	EuroPanels

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DE	GD Holz¹⁴¹ (member of HDH)	All	n.d.	
DE	DeSH (member of HDH)	Sawmilling and planing	n.d.	EOS
DK	DHV	Sawmilling and planing, manufacture of other wood products, manufacture of engineered wood products (glued laminated timber)	2	
EE	EPML	Sawmilling and planing, manufacture of builders' carpentry, manufacture of engineered wood products (glued laminated timber)	2	
EL	POVSKX	Sawmilling and planing, manufacture of panels, manufacture of parquet	n.d.	
EL	PSX	Sawmilling and planing, manufacture of panels, manufacture of parquet, manufacture of builders' carpentry, manufacture of other wood products, manufacture of engineered wood products (glued laminated timber)	n.d.	
ES	ANFP	Sawmilling and planing, manufacture of panels, manufacture of parquet, manufacture of other wood products	n.d.	
ES	UNEmadera	All	1	
ES	ANFTA	Sawmilling and planing, manufacture of panels, manufacture of other wood products	Largest in the panel sector	EuroPanels
ES	Aefcon	Sawmilling and planing, manufacture of panels, manufacture of other wood products, manufacture of engineered wood products (glued laminated timber)		
ES	AEIM	All	n.d.	ETTF
ES	FEIM	All	n.d.	
ES	Cenfim	All	n.d.	
ES	Asecor	Manufacture of other wood products		
ES	Aecork	Manufacture of other wood products		
FI	Sahateollisuus ry	Sawmilling and planing	3	ETTF
FR	UIPP	Manufacture of panels	n.d.	EuroPanels
FR	UIPC	Manufacture of panels, manufacture of other wood products	n.d.	EuroPanels
FR	FNB¹⁴²	Sawmilling and planing, manufacture of parquet, manufacture of containers, manufacture of other wood products, manufacture of engineered wood products (glued laminated timber)	n.d.	EOS, FEP
FR	SEILA	Manufacture of containers	n.d.	FEPFEB
FR	SIEL GROW	Manufacture of containers	n.d.	FEPFEB

¹⁴¹ GD Holz, DeSH and VHI are affiliated to HDH and as such are indirectly represented in CEI-Bois.

¹⁴² CEI-Bois indicated that FNB was confirmed by the French authorities as fully representative of the woodworking sector in France. FNB is a member of EOS and as such is indirectly represented in CEI-Bois.

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FR	FTF	Manufacture of containers	n.d.	
FR	UFME	Manufacture of builders' carpentry	n.d.	
FR	UICB	Manufacture of builders' carpentry	n.d.	
FR	SEFB ¹⁴³	Sawmilling and planing		
HR	HUP UDPI	Sawmilling and planing, manufacture of panels, manufacture of parquet, manufacture of builders' carpentry, manufacture of containers, manufacture of other wood products	Only employer organisation in the sector	
HU	FAGOSZ	Sawmilling and planing, manufacture of panels, manufacture of parquet, manufacture of builders' carpentry, manufacture of containers	1	
HU	Fabunio	Sawmilling and planing, manufacture of builders' carpentry, manufacture of containers, manufacture of engineered wood products (glued laminated timber)	1	
IE	IWFMN	Sawmilling and planing, manufacture of panels, manufacture of builders' carpentry, manufacture of containers, manufacture of other wood products	1	
IT	FLA	Sawmilling and planing, manufacture of panels, manufacture of builders' carpentry, manufacture of containers, manufacture of other wood products	1	FEFPEB
IT	Unital Confapi	All	n.d.	
IT	CNA Produzione	All	n.d.	
IT	Confartigianato Legno e Arredo	All	n.d.	EuroPanels, FEP, ETTF
IT	Casartigiani	All	n.d.	
IT	CLAAI	All	n.d.	
LT	LM	All	1	
LU	FEDIL	Sawmilling and planing, manufacture of panels, manufacture of containers	1	
MT	MEA	Manufacture of builders' carpentry, manufacture of other wood products	1	
MT	CoC	Manufacture of builders' carpentry	2	
PL	SPPD	Manufacture of panels	1	EuroPanels
PT	APIMA	Manufacture of other wood products	Small or very small	
PT	APCOR	Manufacture of other wood products	2	
RO	ASFOR	Sawmilling and planing, manufacture of panels, manufacture of parquet, manufacture of builders' carpentry, manufacture of other wood products,	1	EOS

¹⁴³ As per Arrêté du 8 novembre 2021 fixant la liste des organisations professionnelles d'employeurs reconnues représentatives dans le secteur des exploitations forestières et scieries, published on 19 December 2021 in the *Official Journal of the French Republic*, SEFB is not recognised as a representative employer organisation in France.

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		manufacture of engineered wood products (glued laminated timber)		
RO	APPR (RFOA)		2	
SI	ZDS	All	2	
SK	ZSD SR	Sawmilling and planing, manufacture of panels, manufacture of builders' carpentry, manufacture of other wood products, manufacture of engineered wood products (glued laminated timber)	1	

Note: Due to concerns about the reliability and comparability of the data, information regarding the ranking of organisations needs to be interpreted with caution. The organisations shaded in yellow are indirectly affiliated to CEI-Bois through another European association, which is included in the far-right column. The organisations shaded in blue are involved in collective bargaining in the woodworking sector, and as such participate in shaping the working conditions in the sector in their country.

Source: Network of Eurofound Correspondents, 2021

3.5. Assessment of the collective representativeness of the EFBWW and CEI-Bois in the woodworking sector

Table 38 shows the representativeness of the EFBWW and CEI-Bois in the countries with the highest shares of sector-related workers in the EU woodworking sector workforce. The sectoral workforce in these countries accounts for more than 72% of the total number of employees in the sector in the EU27, according to Eurostat data for 2019. On the left, the table shows that in the nine Member States with the largest sectoral workforce in terms of the absolute number of employees there is at least one trade union affiliated to the EFBWW that is involved in collective bargaining. In Germany, Poland, Italy, Romania, Spain and Czechia, all sector-related trade unions are part of the EFBWW. In France, Sweden and Austria, not all sector-related trade unions are affiliated, but the largest and second largest unions – in terms of membership strength – in France and Sweden and the largest union in Austria are affiliated.

With regard to the results for CEI-Bois, shown on the right of Table 38, employer organisations are directly affiliated to CEI-Bois and involved in collective bargaining in Germany, Sweden and Austria. For the other Member States, there are no directly affiliated organisations, but there are indirectly affiliated ones.

Table 38: Membership of the EFBWW and CEI-Bois in the countries with the highest shares of sector-related workers in the EU27 sectoral workforce

Member State	Trade unions affiliated to the EFBWW	Are the trade unions involved in collective bargaining?		Employer organisations affiliated to CEI-Bois	Are the organisations involved in collective bargaining?	Share in EU27 workforce (%)
DE	1 out of 1	Yes		1 out of 1 (3 business associations are not affiliated)	Yes	17.11
PL	3 out of 3	2 are, at company level		0 out of 1	No	15.58
IT	3 out of 3	Yes		0 out of 6	Yes	8.15
FR	3 out of 5	Yes		0 out of 9	Yes	7.31
RO	1 out of 1	Yes, at company level		0 out of 2	Yes, at company level	6.05
ES	3 out of 3	Yes		0 out of 9		6.02
SE	2 out of 4	Yes		2 out of 2	Yes	4.18
AT	1 out of 2	Yes		1 out of 3	Yes	4.12
CZ	1 out of 1	Yes		0 out of 2		3.66

Note: Green shading indicates direct affiliation to European organisations; yellow shading indicates indirect affiliation to European organisations.

Source: Network of Eurofound Correspondents, 2021

Table 39 shows the representativeness of the EFBWW and CEI-Bois in the countries with the highest shares of sector-related workers in the national workforce in the sector. These are the Member States for which the woodworking sector is, relatively speaking, the most important. No trade unions are members of the EFBWW in Lithuania, Slovenia and Slovakia. On the right of the table, the results for CEI-Bois show that no organisations are members in Lithuania, Poland, Romania and Slovakia. In Poland and Romania, organisations are indirectly represented by CEI-Bois through its associated European organisations.

Table 39: Membership of the EFBWW and CEI-Bois in the countries with the highest shares of sector-related workers in the national workforce

Member State	Trade unions affiliated to the EFBWW	Are the trade unions involved in collective bargaining?	Employer organisations affiliated to CEI-Bois	Are the organisations involved in collective bargaining?	Share in national workforce (%)
EE	1 out of 1	Yes, at company level. However, no agreements are in force and no negotiations are ongoing at the moment.	1 out of 2	No	4.24
LV	1 out of 1	Yes, at company level	1 out of 1	No	3.85
LT	0 out of 1 (+ 1 regional)	Yes, at company level	0 out of 1	No	2.11
HR	1 out of 2	Yes, at company level	1 out of 2	No	1.69
PL	3 out of 3	2 are, at company level	0 out of 1	No	1.51
FI	2 out of 4	Yes	2 out of 3	Yes	1.47
SI	0 out of 2	Yes	1 out of 2	Yes	1.30
AT	1 out of 2	Yes	1 out of 3	Yes	1.23
RO	1 out of 1	Yes, at company level	0 out of 2	Yes, at company level	1.21
SE	2 out of 4	Yes	2 out of 2	Yes	1.15
SK	0 out of 1	Yes	0 out of 1	No	1.14

Note: Green shading indicates direct affiliation to European organisations; yellow shading indicates indirect affiliation to European organisations.

Source: Network of Eurofound Correspondents, 2021

3.6. Multisectoralism of other trade unions in the European Union

A careful assessment of the sectoral trade unions affiliated to other European trade union organisations highlights the multisectoralism of the membership of those trade unions. It appears that

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those trade unions have members in other sectors, besides the woodworking sector, and that it is not their members in the woodworking sector but their members in other sectors who are affiliated to other European trade union organisations (Tables 40 and 41). Based on this analysis, the EFBWW can be considered the only European trade union organisation representing workers in the woodworking sector.

Table 40: Affiliation of trade unions to the other European associations

Member State	Trade union	Affiliation to the EFBWW	Affiliation to the other European associations	Is the trade union involved in the management bodies of the other European organisations?	Are affiliation fees paid by members in the woodworking sector to other European organisations?	Are members actively involved in woodworking sector activities or working groups of the other European organisations?	Examples
AT	GBH		BWI	Yes	Yes	Yes	
AT	GPA		IndustriALL, UNI Europa, EPSU, EFFAT, EFJ and ETF	Yes	No	Yes	GPA participates in the UNI Europa Policy Making Working Group.
BE	(ACV-CSC) BIE		UNI Europa, IndustriALL Europe	Yes	Yes	Yes	
BE	(ABVV-FGTB) ACCG		–				
BE	ACLVB-CGSLB		–				
BG	BFTOFWPI		–				
CY	Oikodomoi-PEO		–				
CY	OOIM-SEK		–				
CZ	OS DLV		–				
CZ	ZO Kronospan		–				
CZ	ZO Pila Paskov		–				
CZ	ZO Stora Enso Wood Products		–				
DE	IG Metall		IndustriALL	Yes	Yes	No	
DK	CO-industri		BWI	No	Yes	No	
DK	3F		–				
EE	EMTAÜ		–				
EL	OOSEE		European part of the UITBB, which is part of the WFTU	n.d.	n.d.	n.d.	
ES	UGT – FICA		IndustriALL Europe, EPSU	No	Yes	Yes	n.d.
ES	CCOO del Hábitat		UNI Europa, EPSU	Yes	Yes	Yes	CCOO del Hábitat participates in the ESSDC for the furniture sector and the ESSDC for the woodworking sector.

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ES	ELA-Industria eta Eraikuntza		IndustriALL Europe	No	Yes	Yes	n.d.
FI	YTN		–				
FI	Pro		–				
FI	Teollisuusliitto		IndustriALL Europe, UNI Europa, EFFAT	Yes	n.d.	n.d.	
FI	Sähköliitto		IndustriALL Europe	n.d.	n.d.	n.d.	
FR	FNCB-CFDT		–				
FR	FNSCBA-CGT		–				
FR	FG-FO		–				
FR	FIBOPA CFE-CGC		CEC European Managers	n.d.	n.d.	n.d.	
FR	BATI-MAT-TP CFTC		–				
HR	SSH		–				
HR	HRSINDSUM		BWI	n.d.	n.d.	n.d.	
HU	MEDOSZ		EFFAT	No	Yes	No	
HU	EFDSZ		CEF	Yes	No	No	
HU	ÉFÉDOSZSZ		–				
HU	MOFA		–				
IE	SIPTU		IndustriALL	Yes	Yes	n.d.	
IE	Fórsa		–				
IE	Connect		–				
IT	Fillea – CGIL		–				
IT	Filca – CISL		–				
IT	Feneal – UIL		–				
LT	LBMAJDPS		–				
LT	KAMDS		–				
LU	Syndicat Bois, Caoutchouc, Céramique, Chimie, Ciment, Papier, Plastique, Textiles et Verre de l'OGB-L		–				
LU	LCGB-Indusid		–				
LV	LMNA		–				
MT	None						
NL	CNV Vakmensen		–				
NL	FNV		–				
PL	SBiPD NSZZ 'Solidarność'		–				
PL	ZZ 'Budowlani'		–				
PL	SBDiOŚ NSZZ 'Solidarność'-80		–				
PT	Feviccom		–				
PT	Sindeq		IndustriALL Europe	No	Yes	No	
PT	Setaccop		–				
PT	SOCN		–				
PT	Sindicato dos Operários Corticeiros do Distrito de Portalegre		–				
PT	SINDCES		–				
RO	FSLIL		BWI				
RO	Forestar Tarcău		–				
SE	GS		UNI Graphical and Packaging	Yes	No	Yes	GS participates in the social dialogue and working groups

Representativeness of the European social partner organisations: Woodworking sector

							of, for instance, EWC
SE	Unionen		–				
SE	Ledarna		–				
SE	Sveriges Ingenjörer		IndustriALL	n.d.	n.d.	n.d.	
SI	SLGS (Sinles)		–				
SI	KNSS Independence		–				
SK	OZ DLV		–				

Notes: Orange shading denotes membership of the EFBWW (yellow indicates indirect membership) and grey shading denotes company-level trade unions. n.d., no data.

Source: Network of Eurofound Correspondents, 2021

Table 41: Other EU trade union associations

Abbreviation	Full name	Assessment of sector-relatedness	Member States with an affiliate according to organisations' websites	Member States with a woodworking sector affiliate
IndustriALL Europe	IndustriALL European Trade Union	IndustriALL Europe is a federation of trade unions representing manual and non-manual workers in sectors such as aerospace, automotive, basic metals, chemicals and basic materials, defence, energy, ICT, mechanical engineering, pharmaceuticals, shipbuilding, and textiles, clothing, leather and footwear. IndustriALL Europe represents 80 national trade union affiliates in 38 European countries.	15 (AT, BE, BG, DE, DK, ES, FR, HU, IE, IT, LU, NL, PL, RO, SE)	8 (AT, BE, DE, ES, FI, IE, PT, SE), all affiliated to the EFBWW
UNI Europa (UNI Global Union)		UNI Global Union has affiliates in 150 countries. In Europe, it represents 272 national trade unions in 50 countries. It organises trade unions in the services sectors, including unions representing agency workers and unions representing workers in sectors such as care, cleaning/security, commerce, finance, gaming, graphics and packaging, hair and beauty, ICT and related services, media and entertainment, post and logistics, and tourism.	n.d.	4 (AT, BE, ES, FI), all affiliated to the EFBWW
UNI Graphical and Packaging (UNI Global Union)		UNI Graphical and Packaging brings together unions representing a wide array of workers, including those from the publishing, printing, packaging and paper converting sectors.	n.d.	1 (SE), affiliated to the EFBWW
EFFAT	European Federation of Food, Agriculture and Tourism Trade Unions	EFFAT represents all workers in the food, agriculture, tourism and domestic work sectors and other related sectors, services and activities in Europe.	26 (without EE)	3 (AT, FI, HU), all affiliated to the EFBWW
EPSU	European Public Service Union	The EPSU is the European social partner organisation for workers in the hospital and healthcare sectors throughout the EU.	27	2 (AT, ES), each affiliated to the EFBWW
ETF	European Transport Workers' Federation	The ETF is a pan-European trade union organisation that embraces transport trade unions from the EU, the	27	1 (AT), affiliated to the EFBWW

Representativeness of the European social partner organisations: Woodworking sector

		European Economic Area, and central and eastern European countries.		
EFJ	European Federation of Journalists	The EFJ is the largest organisation of journalists in Europe. It organises journalists working in all sectors of the media across Europe.	27	1 (AT), affiliated to the EFBWW
CEC European Managers	Confédération Européenne des Cadres	CEC European Managers represents around 1 million managers in Europe through its national and sectoral federations.	10 (CZ, DE, DK, EL, ES, FR, HU, IT, PT, SE)	1 (FR), affiliated to the EFBWW
European part of UITBB	Union internationale des syndicats des travailleurs du bâtiment, du bois et des matériaux de construction	The UITBB is composed of trade union organisations of working people in the building, wood and building materials sectors and allied industries.	n.d.	1 (EL), not affiliated to the EFBWW
BWI				4 (AT, DK, HR, RO)
	European Forestry Council			1 (HU)

Note: ICT, information and communications technology.

3.7. Other European Union associations representing employers or sectoral business interests (subsectoralism)

A careful analysis of the affiliation of employer organisations to other European associations indicated the importance of subsectoral European employer organisations. The most relevant to this study, of course, are the European subsectoral associations affiliated to CEI-Bois (see Table 42). However, there are also others, such as CE Liège, for the cork subsector; the FEIC, for the plywood subsector; and several organisations related to forestry (Propopulus, the CEPF, Eustafor, the USSE).

In addition, there is clear multisectoralism, where national employer organisations in the woodworking sector are also affiliated to European associations in other sectors. This is mainly the case for associations in the construction sector (the EATC, the EBC, the International Log Builders' Association, the EFV), the furniture sector (EFIC and the UEA), and the paper and packaging sectors (CEPI, the EPPA).

Table 42: European sectoral employer organisations affiliated to CEI-Bois

European association	Examples of affiliated sectoral employer organisations (included in this study)	Sector-relatedness
European Federation of Timber Construction (EATC)	BIHB (AT)	Construction sector
European Builders Confederation (EBC)	Houtunie (BE)	See the construction sector representativeness study
SMEunited	DHV (DK), through SMVdanmark	See the cross-industry representativeness study
International Log Builders' Association	EPML (EE)	Construction sector
European Cork Federation (CE Liège)	Asecor (ES), Aecork (ES)	Cork subsector
Confederation of European Paper Industries (CEPI)	Metsäteollisuus ry (FI), FNB (FR)	Paper sector
International Council of Forest and Paper Associations (ICFPA)		
Propopulus	UIPC (FR)	Forestry sector
Confederation of European Forest Owners (CEPF)	FNB (FR)	Forestry sector
European State Forest Association (Eustafor)	FNB (FR)	Forestry sector
European Federation of the Plywood Industry (FEIC)	FNB (FR)	Plywood subsector

Representativeness of the European social partner organisations: Woodworking sector

Union of Silviculturists of Southern Europe (USSE)	FNB (FR)	Forestry sector
European Paper Packaging Alliance (EPPA)	UFME (FR)	Packaging sector
BusinessEurope	HUP UDPI (HR)	Cross-industry level
European Federation of Office Furniture (FEMB)	FLA (IT), TMF (SE)	Furniture sector
Bioenergy Europe	LKF (LV)	Energy sector
SGI Europe	MEA (MT)	Cross-industry level
Enterprise Europe Network	CoC (MT)	Cross-industry level
Eumabois	ZSD SR (SK)	Machines for woodworking
European Federation of Premanufactured Building (EFV)	ZSD SR (SK)	Construction sector
European Timber Industries Confederation (ETIC)	AIMMP (PT), SEFB (FR), SNCF Réseau (FR), APPR (RO), ATIBT (EU)	See Section 3.8

Source: Authors' elaboration

A specific analysis of the organisation ETIC is included in Section 3.8. Table 43 shows the number of member organisations of the European associations affiliated to CEI-Bois, marked in yellow, and, on the right, the European employer organisations for the furniture sector EFIC and the UEA.

Table 43: European employer associations affiliated to CEI-Bois, EFIC and the UEA

	CEI-Bois	EOS	FEP	EuroPanels	ETTF	EFIC	UEA
Member organisations	17	9	4	10	7	12	2
Number of organisations that are members of CEI-Bois and the relevant organisation		5	2	2	1	6	0
Member States		AT, BE, DK (2), SE	AT, SE	AT, BE	BE	AT, DK (2), LV, PT, SE	
Number of organisations that are members of the relevant organisation but not of CEI-Bois		4	2	8	6	6	2
Member States with organisations that are members of CEI-Bois and another organisation affiliated to the relevant organisation		BE, DE		DE	BE, DE, NL		
Member States where no organisations are members of CEI-Bois but another organisation is affiliated to the relevant organisation		FR, RO	ES, IT	ES (2), FR (3), IT, PL	EL, ES, IT	BG, CY, ES, HU, IE, IT	ES, PT

Source: Network of Eurofound Correspondents, 2021

3.8. European Timber Industries Confederation

The European Timber Industries Confederation (ETIC) was created in May 2021. According to its website, it focuses on sectoral policy issues related to raw material supplies, sustainability and the circular economy.

The Portuguese organisation the AIMMP is affiliated to ETIC and covers both the woodworking sector (NACE 16) and the production of furniture (NACE 31). Altogether, the AIMMP represents about 200 companies, in both the wood and furniture sectors, with a workforce that corresponds to about 31% of the total woodworking workforce in Portugal (Table 44). Until 2020, the AIMMP was also directly affiliated to CEI-Bois. As of 2021, this was no longer the case, though as the AIMMP is a member of FEFPEB it remains indirectly affiliated to CEI-Bois through the federation.

SNCF Réseau is a French railway company. It has about 500 employees in the production of other wood products (NACE 16.29) related to the supply of impregnated wooden sleepers and switches in railway infrastructure networks. The company reports that it is still affiliated to the French employer organisation the FNB (though ETIC states that this is not the case), and the FNB is affiliated to EOS. At European level, SNCF Réseau is also affiliated to the ATIBT, which has also recently been linked to ETIC.

The real representativeness of ETIC, which is not represented in the woodworking sector ESSDC by CEI-Bois, depends on the following two organisations: the SEFB, its affiliate in France,¹⁴⁴ and the Romanian Forest Owners Association (APPR). ETIC also reported that it is linked with the ATIBT; however, this could not be confirmed in this study. ETIC does not cooperate at all with the EFBWW, which makes it simply a European business association. It is listed among several others in Section 3.7.

Table 44: Organisations affiliated to ETIC

Member State	Abbreviation	Full name	Number of affiliated companies	Number of woodworking sector workers that are members of this trade union	Member of ETIC since
FR	SNCF Réseau	Société Nationale des Chemins de fer Français – Réseau	1	About 100	May 2021
FR	SEFB	Syndicat des Exploitants de la Filière Bois	100	1,000 to 1,500	July 2021
PT	AIMMP	Associação das Indústrias de Madeira e Mobiliário de Portugal	200	About 90,000 (31% of the sectoral workforce)	May 2021
RO	APPR	Asociația Proprietarilor de Păduri din România	550	50,000 to 150,000	January 2022
EU	ATIBT	Association Technique Internationale des Bois Tropicaux	n.a.	n.a.	September 2022

Notes: The link between the ETIBT and ETIC was not confirmed in this study. AIMMP was affiliated to CEI-Bois until 2021, and SNCF-Reseau was affiliated to CEI-Bois until 2021 and is still affiliated to the FNB. The FNB is an indirect member of CEI-Bois, affiliated through EOS. n.a., not applicable.

Source: ETIC, 2023

The SEFB reported that it represents 100 companies in France, active in sawmilling and planing (NACE 16.10). It consists of 90 microfirms with fewer than 10 employees, 9 small companies with a workforce of between 10 and 49 employees, and 1 company with more than 50 employees. The total workforce of the member companies of the SEFB is estimated to be between 1,000 and 1,200 workers. This is about 2% of the workforce of the entire woodworking sector in France. The SEFB is not involved in sectoral social dialogue or collective bargaining. CEI-Bois does not have any directly affiliated member organisations in France; however, it has member organisations that are indirectly affiliated through its European subsector associations.

The APPR represents 550 member companies, with a collective workforce of about 15,000 workers. However, these companies also cover several other sectors, including furniture, construction, paper, packaging, bioenergy and transport. The workers of the affiliated companies that are part of the woodworking sector constitute about 10% of the woodworking sector workforce, meaning that about a quarter of the total workforce of the affiliated companies is in the woodworking sector. The APPR is not involved in collective bargaining. It reports that it is involved in bipartite social dialogue, though it

¹⁴⁴ CEI-Bois indicates that in the (French) Decree of 8 November 2021 regarding the representativeness of employer organisations in the forestry and woodworking sector, published on 19 December 2021 in the *Official Journal of the French Republic*, SEFB is not recognised as a representative employer organisation in France for the woodworking sector.

is not clear whether this social dialogue is related to the woodworking sector, or if this in any way shapes the working conditions of woodworking sector employees. The APPR reports that it is the third largest woodworking sector employer organisation in terms of membership strength. ASFOR is the largest Romanian woodworking sector employer organisation. No information is available on which Romanian woodworking sector employer organisation is the second largest. CEI-Bois does not have a directly affiliated member organisation from Romania; however, ASFOR is indirectly affiliated through EOS, the subsectoral European association for sawmilling and planing.

All in all, the membership of ETIC is expected to grow, with more organisations becoming affiliated in 2023. In the current study, its relative membership strength in the woodworking sector at the end of 2022 was assessed.

3.9. Negotiating capacity

The EFBWW agreed on 17 texts between 1994 and 2022 (Table 45). In 2020–2022, six joint opinions were agreed on, which account for 35% of all joint texts for this sector.

Table 45: Joint texts agreed on by the EFBWW

Date	Text
6 September 2022	Joint statement by the European social partners representing the woodworking sector in view of the adoption of the revised rules on land use, land use change, and forestry
8 November 2021	The European woodworking social partners are committed to EU's climate ambition
17 May 2021	Building together a greener future
27 April 2021	Declaration on healthy and safe workplaces
3 November 2020	Joint position paper on the Renovation Wave Strategy
24 April 2020	Covid-19: To fight the corona pandemic, the European woodworking and furniture industries propose measures to protect workers health, support economic activity and the sector's recovery
24 May 2018	Joint statement of the European social partners from the woodworking sector and the furniture sector
1 January 2013	Joint position paper on the new OSH strategy
10 February 2010	Joint declaration of the social partners in the European woodworking industries
10 June 2008	Position paper on the European Commission's proposal for a directive on renewable energy sources
1 October 2007	Joint declaration on illegal logging and certification of wood
24 October 2006	Demand the carbon stores with a positive contribution to climate change
13 June 2003	Biomass combustion beyond reasonable limits?
20 March 2002	Code of conduct: A charter for the social partners in the European woodworking industry
12 March 2001	Rules of procedure of the woodworking ESSDC
5 September 1997	Joint declaration on sustainable forestry
17 June 1994	Memorandum of understanding on engagement in a social dialogue

Source: Authors' elaboration

The EFBWW was established in 1958, and its first general assembly took place on 5 May 1974. Recent changes in the organisation relate to the election of a new leader at the end of 2019, and the departure of some key senior staff members from the organisation. The EFBWW has 10 staff members, of whom 5 are regularly involved in European social dialogue activities. Its regular budget is funded only by membership fees, in line with Article 15 of its constitution. The EFBWW has a website with a separate members-only section. Decisions in the organisation are usually taken by consensus; a vote can be requested only if necessary (in exceptional cases), and in those cases a simple majority is enough to take a decision. Other decision-making procedures apply only to decisions regarding membership fees.

The EFBWW has a statutory capacity to negotiate, with a standard mandating procedure formalised in its statutes, and formal decision-making procedures. Within the organisation, there is a standing committee for the furniture sector in which sector-related matters are discussed and agreed on. A mandate is obtained following discussions in the standing committee and in an executive committee. In the case of negotiations around a text, draft versions are exchanged with the members of the standing committee. Once texts are agreed, the Secretary-General, the president of the standing committee or the president of the federation signs them on behalf of the EFBWW. Agreed social dialogue texts are disseminated through the EFBWW's website, email and social media. In addition, the EFBWW coordination group for occupational health and safety occasionally deals with European social dialogue matters.

CEI-Bois was established in 1952. It currently has two full-time equivalent permanent staff members: one secretary-general shared with EOS, and two part-time external consultants. One external consultant and the Secretary-General are regularly involved in the activities of the ESSDC. Its budget is entirely based on membership fees. The organisation has a website, with no members-only section. Internal decision-making is based on unanimity. No position paper is released if a member organisation highlights a critical issue. CEI-Bois has the capacity to negotiate agreements and joint opinions.

Within CEI-Bois, there is a social affairs working group through which most of the organisation's work is conducted. The group has an ad hoc mandate to deal with ESSDC matters. Draft texts are forwarded to the social affairs working group, and members have a chance to express their opinions and make comments. This working group is open to all members willing to participate and be involved in the activities of the ESSDC. It is chaired by a representative of a member of CEI-Bois, not by a staff member. The chair is elected during the general assembly and ensures that the activities of the working group are in line with the priorities of the organisation. The CEI-Bois general assembly is held twice a year, informing attendees about the ESSDC's activities. Once a draft text is adopted by the social affairs working group and approved by all members, the Secretary-General signs it on behalf of the organisation. Agreed texts are disseminated through CEI-Bois's website, through email to all its members, through the press and external partners, and through social media.

CEI-Bois has increased its activity in the area of social affairs. This can mainly be explained by the increase in the number of social initiatives implemented by the European Commission but is also due to the willingness of CEI-Bois to be more visible and active in such initiatives. CEI-Bois has started participating more regularly in meetings of the Liaison Forum but also participates in and provides input to social partner consultations. This increase in participation can also be explained by the appointment of a new chairman to the social affairs working group and by the increase in interest among CEI-Bois's members in the activities of the ESSDC. CEI-Bois has an ad hoc capacity to negotiate, based on established practices and unanimous decision-making.

3.10. Effective participation in European sectoral social dialogue committee meetings

In 2021, as in 2022, there was one plenary meeting of the woodworking sector ESSDC, in May (see Table 46). In addition, joint meetings were held with the woodworking and furniture sector ESSDCs in October 2021, February 2022 and October 2022.

Table 46: Meetings of the woodworking sector ESSDC

Meetings of the ESSDC	Trade union delegates (EFBWW)		Employer organisation delegates (CEI-Bois)	
	May 2021	May 2022	May 2021	May 2022
Number of participants	14	10	6	4
Member States represented	7 (BE, DE, DK, ES, FI, IT, SE)	5 (DK, ES, FI, IT, SE)	4 (BE, DE, HR, SE)	3 (HR, IT, SE)

Source: Authors' elaboration based on input from DG Employment 2023

The EFBWW has affiliated woodworking sector trade unions in 22 Member States, and CEI-Bois has affiliated sectoral employer organisations in 11 Member States. In 2021–2022, delegates from seven Member States participated in the woodworking sector ESSDC (Table 47). The EFBWW has affiliated sectoral trade unions in 15 Member States that did not participate in the meetings in this two-year period. CEI-Bois had delegates participating from five Member States, although it also has members in eight other Member States that did not participate.

Table 47: Participation of organisations in the woodworking sector ESSDC, 2021–2022

Member States from which trade union delegates participated	7 (BE, DE, DK, ES, FI, IT, SE)
Member States in which the EFBWW has members that were not represented	15 (AT, BG, CY, CZ, EE, FR, HR, HU, IE, LU, LV, NL, PL, PT and RO)
Member States from which employer organisation delegates participated	5 (BE, DE, HR, IT, SE)
Member States in which CEI-Bois has members that were not represented	8 (AT, DK, EE, FI, LV, NL, PT and SI)

Source: Authors' elaboration based on input from DG Employment 2023

Some organisations are affiliated to CEI-Bois indirectly, through associated European subsectoral organisations. The participation of these organisations in meetings can also be considered.

Besides the woodworking sector ESSDC's own annual meeting, one joint meeting was held in 2021 together with the furniture sector ESSDC, and in 2022 two such joint meetings were held. The practice of holding joint meetings on health and safety and vocational training started in 2016. In the three joint meetings held in 2021–2022, there were delegates from the EFBWW from 12 Member States (Table 48). The 10 Member States where the EFBWW has members that did not participate in those joint meetings were Bulgaria, Croatia, Cyprus, Czechia, Estonia, Hungary, Latvia, Luxembourg, Portugal and Romania. No delegates from those 10 Member States attended the woodworking sector ESSDC meetings in 2021 or 2022.

Table 48: Participation of delegates of organisations in meetings of the ESSDC

Woodworking and furniture sector ESSDC joint meetings	Trade union delegates (EFBWW)	Employer organisation delegates (CEI-Bois and its European subsector affiliates EOS and ETTF, and EuroPanels, a guest invited by CEI-Bois)
October 2021	15 participants from 8 Member States	16 participants from 13 Member States
February 2022	7 participants from 6 Member States	13 participants from 8 Member States
October 2022	11 participants from 7 Member States	12 participants from 10 Member States
Total for all three joint meetings	Participants from 12 Member States (AT, BE, DE, DK, ES, FI, FR, IE, IT, NL, PL, SE)	Participants from 15 Member States (BE, BG, CZ, DE, ES, FI, FR, HR, IE, IT, LV, NL, PT, RO, SE)

Source: Authors' elaboration based on input from DG Employment 2023

4. Conclusions

The woodworking sector employs around 800,000 workers in the EU27, which is about 0.7% of the entire EU workforce. Almost two-thirds of the sectoral workforce are employed in the production of builders' carpentry (38%) and in sawmilling and planing (25%). Some 12% of the sectoral workforce are employed in the production of panels, 11% in the production of wood containers and 10% in other wood products. The production of parquet provides employment to about 4% of the entire woodworking sector workforce (Figure 2).

Looking at the companies' landscape in the woodworking sector, 90% are microfirms with fewer than 10 employees, which provide employment to 29% of the sectoral workforce. While 8% of companies in the sector have between 10 and 49 employees, they employ 28% of the sectoral workforce. The 1.3% of companies with between 50 and 249 employees employ 21.5% of the workforce, and companies with 250 or more employees employ 21.2% of the sectoral workforce (Figure 8).

At national level, there are 66 sectoral trade unions. In Malta, no sectoral trade union was identified. Half of the trade unions organise workers in all sectoral activities (Table 6). Almost all are multisectoral, in the sense that they also organise workers in other sectors (Table 26 in Section 2.10). A total of 54 woodworking sector trade unions (82%) also organise workers in the furniture sector, and 38 (58%) also represent workers in the construction sector. Multisectoralism on the part of trade unions is also observed with the paper and packaging, energy and transport sectors.

This study identified 73 employer organisations and business associations across the 27 EU Member States. A third of the employer associations organise companies that are active in all sectoral activities (Table 11). A total of 41 national employer organisations (58%) also organise companies in the furniture sector, and 24 (34%) also organise companies in the construction sector (Table 27 in Section 2.10).

In terms of sector-relatedness, multisectoralism is strongest among national woodworking sector trade unions, while subsectoralism with different national associations for specific parts of the sector is more frequent among woodworking sector employer organisations. For both trade unions and employer organisations, multisectoralism is most frequent with the furniture sector, followed by the construction sector.

There are sector-specific social dialogue structures in 12 Member States (Table 24 in Section 2.9) and sectoral paritarian organisations in 9 Member States (Annex 4). The sectoral social dialogue structures exist in Belgium, Bulgaria, Czechia, Denmark, Estonia, Finland, France, Hungary, Italy, the Netherlands, Romania and Slovakia. There are 20 woodworking sector paritarian organisations in 9 Member States. The Member States where sectoral paritarian organisations exist are Belgium, Cyprus, Denmark, France, Hungary, Latvia, the Netherlands, Romania and Sweden.

In 16 Member States, MEB takes place at sectoral level. In Austria, Finland, the Netherlands and Portugal, only MEB is conducted, while in 12 Member States (Belgium, Cyprus, Czechia, Denmark, France, Germany, Hungary, Italy, Slovakia, Slovenia, Spain and Sweden) it is carried out in combination with SEB. In nine Member States, only SEB takes place at company level (Bulgaria, Croatia, Estonia, Ireland, Latvia, Lithuania, Luxembourg, Poland and Romania). In Greece and Malta, no collective bargaining takes place in the woodworking sector (Table 19 in Section 2.7).

At European level, there are two European social partner organisations. The EFBWW and CEI-Bois have participated in the woodworking sector ESSDC since it was established in 2000 (Section 0.2). On top of this long standing mutual recognition, both the EFBWW and CEI-Bois are recognised European social partner organisations on the list of organisations with a right to be consulted by the European Commission under Article 154 of the TFEU.

In terms of effective participation in the meetings of the ESSDC, the EFBWW had participants from seven EU Member States, and CEI-Bois from five Member States. The EFBWW has affiliates from 15 Member States that did not participate in any ESSDC meetings in 2021–2022. For CEI-Bois, national affiliates from eight Member States did not participate in any ESSDC meetings in that two-year period. An established practice of holding joint meetings with the furniture sector ESSDC has been in place since 2016.

A total of 37 of the 66 sectoral trade unions (56%), from 22 Member States, are affiliated to the EFBWW. The four Member States where there are sectoral trade unions but none are affiliated to the EFBWW are Greece, Lithuania, Slovakia and Slovenia. In Malta, there are no sectoral trade unions.

All 37 woodworking sector trade unions affiliated to the EFBWW are involved in collective bargaining and as such are involved in shaping the working conditions of the sectoral workforce. They represent 82% of the entire EU sectoral workforce. A total of 36 (59%) of the 61 trade unions involved in sectoral collective bargaining are affiliated to the EFBWW. The 29 sectoral trade unions that are not represented by the EFBWW in the woodworking sector ESSDC, of which 25 are involved in collective bargaining, are listed in Section 3.2. In 19 Member States, the sectoral trade union with the largest membership strength is affiliated to the EFBWW. In three Member States (Cyprus, Hungary and Portugal), the EFBWW has an affiliated sectoral trade union, though not the largest in the country in terms of membership strength. The EFBWW has proven capacity to negotiate. The results of an assessment of any other European associations that have representativeness in the sector show that **the EFBWW is the only representative European trade union organisation in the woodworking sector.**

A total of 16 of the 73 sectoral employer organisations investigated in this study are directly affiliated to CEI-Bois, from 13 Member States: Austria, Belgium, Croatia, Denmark, Estonia, Finland, Germany, Italy, Latvia, the Netherlands, Portugal, Slovenia and Sweden. In these Member States, 44% of the entire sectoral workforce is employed. In Austria, Belgium, Denmark, Finland, Germany, the Netherlands, Portugal, Slovenia and Sweden, directly affiliated employer organisations are involved in changing sectoral working conditions. These Member States provide employment to 36% of the sectoral workforce. In Croatia, Estonia and Latvia, CEI-Bois has affiliated organisations that are not involved in collective bargaining. In 2023, an additional employer organisation – the Wood Processors Association, from Lithuania – joined. With this additional member organisation, CEI-Bois has 17 affiliated employer organisations in 14 Member States as of 2023.

CEI-Bois also has associated European subsectoral organisations. Through those, it has indirect affiliates in six Member States: Czechia, Spain, France, Hungary, Poland and Romania. In France, Italy and Romania, these indirectly affiliated employer organisations are involved in collective bargaining. And in these three Member States, about 21% of the sectoral workforce are employed. Indirect membership of CEI-Bois, and the degree to which CEI-Bois also represents the national associations, are therefore crucial for its representativeness in the sector. CEI-Bois has an ad hoc capacity to negotiate, based on established practices and decision-making on the basis of unanimity.

A total of 55 sectoral employer organisations and business associations are not directly represented by CEI-Bois. Among them there are 16 national associations that are indirectly affiliated through associated European subsectoral organisations. The remaining 39 national employer organisations and businesses of the 73 included in the study (53%) are not represented by CEI-Bois at all (Section 3.4).

There are other European associations with some representativeness in the woodworking sector. The most relevant are CE Liège for the cork subsector and FEIC for the plywood subsector, and several organisations related to forestry (Propopulus, the CEPF, Eustafor, the USSE). At the request of ETIC, a separate analysis of its representativeness was conducted in Section 3.8. The results showed that the confederation has rather poor representativeness in the sector. None of the other organisations, including CE Liège, FEIC and the forestry-related European associations, reported cooperating with the EFBWW, which means that they are simply European business associations. However, CEI-Bois is not the only European organisation with affiliated national sectoral employer organisations (involved in sectoral collective bargaining).

An assessment of the representativeness of CEI-Bois indicated that in nine Member States the organisation with the strongest membership domain is affiliated to it (Table 35), and that it is the organisation with by far the most affiliated employer organisations involved in collective bargaining in the woodworking sector. CEI-Bois has directly affiliated member organisations in 13 Member States, and indirectly affiliated organisations in another 6 Member States. In conclusion, **CEI-Bois is the most representative European employer organisation in the woodworking sector.**

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Annex 1: List of trade unions and employer organisations in the woodworking sector

Table 49: National trade unions

Member State	Abbreviation	Name in English	Name in original language	Affiliation
AT	GBH	Construction and Woodworkers' Union	Gewerkschaft Bau-Holz	
AT	GPA	Union of Private Sector Employees	Gewerkschaft der Privatangestellten	
BE	(ACV-CSC) BIE	(Confederation of Christian Trade Unions) Construction Industry and Energy	(Algemeen Christelijk Vakverbond) Bouw Industrie en Energie	
BE	(ABVV-FGTB) ACCG	(General Labour Federation of Belgium) General Federation	(Algemeen Belgisch Vakverbond) Algemene Centrale	
BE	ACLVB-CGSLB	General Federation of Liberal Trade Unions of Belgium	Algemene Centrale der Liberale Vakbonden van België	
BG	BFTOFWPI	Bulgarian Federation of Trade Union Organizations in Forestry and Wood Processing Industries	Федерация на синдикалните организации от горското стопанство и дървопреработващата промишленост	
CY	Oikodomoi-PEO	Cyprus Building, Wood, Mine and General Workers Trade Union – Pancyprian Federation of Labour	Συντεχνία Οικοδόμων, Ξυλουργών, Μεταλλωρύχων και Γενικών Εργατών Κύπρου – Παγκύπρια Εργατική Ομοσπονδία	
CY	OOIM-SEK	Federation of Builders, Miners and Relevant Professions – Cyprus Workers' Confederation		
CZ	OS DLV	Trade Union of Workers in Woodworking Industry, Forestry and Management of Water	Odborový svaz pracovníků dřevozpracujících odvětví, lesního a vodního hospodářství	
CZ	ZO Kronospan	Basic organisation OS DLV, Kronospan Jihlava	Základní organizace OS DLV, Kronospan Jihlava	
CZ	ZO Pila Paskov	Trade union organisation Pila Paskov	Odborová organizace Pila Paskov	
CZ	ZO Stora Enso Wood Products	Basic organisation Stora Enso Wood Products Ždírec s.r.o.	Základní organizace Stora Enso Wood Products Ždírec s.r.o.	
DE	IG Metall	Metalworkers' Union	Industriegewerkschaft Metall	
DK	CO-industri	Central Organisation of Industrial Employees in Denmark	Centralorganisationen af Industriansatte i Danmark	
DK	3F	United Federation of Danish Workers	Fagligt Fælles Forbund	

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EE	EMTAÜ	Trade Union of Estonian Forest Industry Workers	Eesti Metsatöötajate Ametiühing	
EL	OOSEE	Greek Federation of Builders and Related Professions	Omospondia Oikodomon kai Synafon Epagelmaton Elladas	
ES	UGT FICA	Industry, Construction and Agriculture Federation of the General Workers' Union	Federación de Industria, Construcción y Agro de la Unión General de Trabajadores	
ES	CCOO del Hábitat	CCOO of Hábitat	Confederación Sindical de Comisiones Obreras del Hábitat	
ES	ELA-Industria eta Eraikuntza	Basque Workers Solidarity – Industry and Construction	Euskal Langileen Alkartasuna – Industria eta Eraikuntza	
FI	YTN	Federation of Professional and Managerial Staff YTN	Ylemmät Toimihenkilöt	
FI	Pro	Trade Union Pro	Ammattiliitto Pro	
FI	Teollisuusliitto	Finnish Industrial Union	Teollisuusliitto	
FI	Sähköliitto	Finnish Electrical Workers' Union	Sähköliitto	
FR	FNCB-CFDT	National Federation of Construction and Wood Workers	Fédération Nationale des Salariés de la Construction et du Bois	
FR	FNSCBA-CGT	National Federation of Construction, Wood and Furniture Workers CGT	Fédération nationale des salariés de la construction, bois et ameublement CGT	
FR	FG-FO	General Federation FO	Fédération Générale FO	
FR	FIBOPA CFE-CGC	Wood and Paper Sector of the French Confederation of Professional and Managerial Staff – General Confederation of Professional and Managerial Staff	Filière Bois Papier de la Confédération française de l'encadrement – Confédération générale des cadres	
FR	BATI-MAT-TP CFTC	BA-TI-MAT CFTC Federation	Syndicat de Service pour la Population de la Construction	
HR	SSH	Autonomous Trade Union of Croatia	Samostalniskindikat Hrvatske	
HR	HRSINDSUM	Croatian Woodwork Trade Union	Hrvatski sindikat šumarstva	
HU	MEDOSZ	Trade Union of Agriculture, Forestry, Food and Water Supply Workers	Mezőgazdasági, Erdészeti és Vízügyi Dolgozók Szakszervezeti Szövetsége	
HU	EFDSZ	Trade Union of Forestry and Wood Workers	Erdészeti és Faipari Dolgozók Szakszervezete	
HU	ÉFÉDOSZSZ	Federation of Building, Wood and Material Workers' Unions	Építő, Fa, és Építőanyagipari Dolgozók Szakszervezeteinek Szövetsége	
HU	MOFA	Work Council of MOFA	MOFA Munkástanácsa	
IE	SIPTU	Services Industrial Professional and Technical Union	Services Industrial Professional and Technical Union	

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IE	Fórsa	Fórsa	Fórsa	
IE	Connect	Connect	Connect	
IT	Fillea – CGIL	Italian Federation of Wood, Construction and Allied Workers – Italian General Confederation of Labour	Federazione Italiana dei Lavoratori del Legno, dell’Edilizia, delle industrie Affini ed estrattive – Confederazione Generale Italiana del Lavoro	
IT	Filca – CISL	Italian Federation of Construction and Allied Workers – Italian Confederation of Workers’ Trade Unions	Federazione Italiana Lavoratori delle Costruzioni e Affini – Confederazione Italiana Sindacati Lavoratori	
IT	Feneal – UIL	National Federation of Construction, Wood and Allied Workers – Union of Italian Workers	Federazione nazionale lavoratori edili affini e del legno – Unione Italiana del Lavoro	
LT	LBMAJDPS	Trade Union of Furniture and Woodworking Workers of Lithuania	Lietuvos baldų ir medžio apdirbimo įmonių darbuotojų profesinė sąjunga	
LT	KAMDS	Union of Woodworking Employees of Klaipėda County	Klaipėdos apskrities medienos darbininkų sąjunga	
LU	Syndicat Bois, Caoutchouc, Céramique, Chimie, Ciment, Papier, Plastique, Textiles et Verre de l’OGB-L	Wood, Rubber, Ceramics, Chemicals, Cement, Paper, Plastic, Textiles and Glass Union of the OGB-L	Syndicat Bois, Caoutchouc, Céramique, Chimie, Ciment, Papier, Plastique, Textiles et Verre de l’OGB-L	
LU	LCGB-Indusid	Luxembourg Confederation of Christian Trade Unions – Industry and steel industry	Lëtzebuurger Chrëschtliche Gewerkschafts-Bond – Industrie et sidérurgie	
LV	LMNA	Forest Sphere Trade Union of Latvia	Latvijas Meža nozares arodbiedrība	
MT				
NL	CNV Vakmensen	National Federation of Christian Trade Unions Professionals	Christelijk Nationaal Vakverbond Vakmensen	
NL	FNV	Federation of Dutch Trade Unions	Federatie Nederlandse Vakbeweging	
PL	SBiPD NSZZ ‘Solidarność’	Secretariat of Construction and Woodworking Industry of the NSZZ ‘Solidarność’	Sekretariat Budownictwa i Przemysłu Drzewnego NSZZ ‘Solidarność’	
PL	ZZ ‘Budowlani’	Trade Union ‘Builders’	Związek Zawodowy ‘Budowlani’	
PL	SBDiOŚ NSZZ ‘Solidarność’-80	Secretariat of Construction Industry, Woodworkers and Environmental Protection of the NSZZ ‘Solidarność’-80	Sekretariat Budownictwa, Drzewiarzy i Ochrony Środowiska NSZZ ‘Solidarność’-80	
PT	Feviccom	Portuguese Federation of Construction, Ceramics and Glass Trade Unions	Federação Portuguesa dos Sindicatos da Construção, Cerâmica e Vidro	

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PT	Sindeg	Union of Industries and Related	Sindicato das Indústrias e Afins	
PT	Setaccop	Construction, Public Works and Related Services Union	Sindicato da Construção, Obras Públicas e Serviços Afins	
PT	SOCN	Northern Cork Workers Union	Sindicato dos Operários Corticeiros do Norte	
PT	Sindicato dos Operários Corticeiros do Distrito de Portalegre	Cork Workers Union of the District of Portalegre	Sindicato dos Operários Corticeiros do Distrito de Portalegre	
PT	SINDCES	Democratic Trade Union of Commerce, Offices and Services	Sindicato Democrático do Comércio, Escritórios e Serviços	
RO	FSLIL	Federation of Free Trade Unions in the Wood Industry	Federația Sindicatelor Libere din Industria Lemnului	
RO	Forestar Tarcău	Forestar Tarcău Forestry Trade Union	Sindicatul Forestier Forestar Tarcău	
SE	GS	Swedish Union of Forestry, Wood and Graphical Workers	GS Facket för Skogs-, Trä- och Grafisk Bransch	
SE	Unionen	Unionen	Unionen	
SE	Ledarna	Ledarna	Ledarna	
SE	Sveriges Ingenjörer	Swedish Association of Graduate Engineers	Sveriges Ingenjörer	
SI	SLGS (Sinles)	Wood Processing Industry Trade Union of Slovenia	Sindikatsarstva in gozdarstva Slovenije	
SI	KNSS Independence	Confederation of New Trade Unions of Slovenia	KNSS Neodvisnost	
SK	OZ DLV	Trade Union of Wood, Forestry and Water Management	Odborový zväz drevo, lesy, voda	

Note: Orange shading denotes membership of the EFBWW (yellow indicates indirect membership) and grey shading denotes company-level trade unions.

Source: Network of Eurofound Correspondents, 2021

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Table 50: National employer organisations

Member State	Abbreviation	Name in English	Name in original language	Affiliation
AT	FVHI	Association of the Austrian Wood Industries	Fachverband der Holzindustrie	
AT	BITH	Federal Association of the Carpenters and Wood-designing Crafts	Bundesinnung der Tischler und Holzgestalter	
AT	BIHB	Federal Association of Timber Construction	BundesinnungHolzbau	
BE	Belgische Houtconfederatie	Wood Confederation	Belgische Houtconfederatie	
BE	Fedustria	Fedustria	Fedustria	
BE	Houtunie	Wood Union	Houtunie	
BG	BCWFI	Branch Chamber of Woodworking and Furniture Industry	Браншова Камара на дървообработващата и мебелната промишленост	
CY	PASYVEX	Cyprus Furniture & Woodworking Industry Association		
CZ	ALDP	Association of Forestry and Wood Processing Companies	Asociace lesnických a dřevozpracujících podniků	
CZ	SZDP	Union of Employers of the Wood Processing Industry	Svaz zaměstnavatelů dřevozpracujícího průmyslu	
DE	HDH	Main Association of the German Wood Industry	Hauptverband der deutschen Holzindustrie	
DE	VHI	German Wood-Based Panels Association	Verband der Deutschen Holzwerkstoffindustrie	
DE	GD Holz	German Timber Trade Federation	Gesamtverband Deutscher Holzwirtschaft	
DE	DeSH	Federal Association of the Sawmilling and Woodworking Industry	Deutsche Säge- und Holzindustrie Bundesverband	
DK	DTI	Danish Sawmill Association	Danske Træindustrier	
DK	TMI	Association of Danish Wood and Furniture Industries	Træ- og Møbelindustrien	
DK	DI	Confederation of Danish Industry	Dansk Industri	
DK	DHV	Danish Handcraft Association	Dansk Håndværk	
EE	EMPL	Estonian Forest and Wood Industries Association	Eesti Metsa- ja Puidutööstuse Liit	
EE	EPML	Estonian Woodhouse Association	Eesti Puitmajaliit	
EL	POVSKX	Pan-Hellenic Federation of Craft Woodworking Associations	Panellinia Omospondia Viotehnikon Somation Katergasias Xilou	

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EL	PSX	Hellenic Timber Association	Panellinios Sindesmos Xilias	
ES	ANFP	National Association of Parquet Manufacturers	Asociación Nacional de Fabricantes de Parquet	
ES	UNEmadera	Spanish Business Association of Woodwork and Furniture	Unión Empresarial de la Madera y el Mueble de España	
ES	ANFTA	National Association of Panel Manufacturers	Asociación Nacional de Fabricantes de Tableros	
ES	Aefcon	Spanish Association of Plywood Board Manufacturers	Asociación Española de Fabricantes de Tablero Contrachapado	
ES	AEIM	Spanish Association of Wood Trade and Industry	Asociación Española del Comercio e Industria de la Madera	
ES	FEIM	Federation of Wood Industries of Spain	Federación española de industrias de la madera	
ES	Cenfim	Cluster and Innovation Hub for Home and Contract Equipment	Cluster e innovation hub del equipamiento del hogar y el contract	
ES	Asecor	Sanvicenteña Grouping of Cork Companies	Agrupación Sanvicenteña de Empresarios del Corcho	
ES	Aecork	Association of Cork Companies of Catalonia	Associació d'Empresaris Surers de Catalunya	
FI	Sahateollisuus ry	Finnish Sawmills Association	Sahateollisuus ry	
FI	Metsäteollisuus ry	Finnish Forest Industries Federation	Metsäteollisuus ry	
FI	PTY	Federation of the Finnish Woodworking Industries	Puutuoteteollisuusyrittäjät	
FR	UIPP	Union of Process Panel Industries	Union des Industries de Panneaux de Process	
FR	UIPC	French Plywood Producers Union	Union des industries du panneau contreplaqué	
FR	FNB	National Wood Federation	Fédération Nationale du Bois	
FR	SEILA	Union of Industrial Packaging and Associated Logistics	Syndicat de l'Emballage Industriel et de la Logistique Associée	
FR	SIEL GROW	National Union of Light Wood Packaging Industries	Syndicat National des Industries de l'emballage léger en bois	
FR	FTF	Federation of French Coopers	Fédération des tonneliers de France	
FR	UFME	Union of Joinery Manufacturers	Union des fabricants de menuiserie	
FR	UICB	Union of Wood Manufacturers and Builders	Union des industriels et constructeurs bois	
FR	SEFB		Syndicat des Exploitants de la Filière Bois	
HR	HUP UDPI	Croatian Employers' Association – Wood and Paper Industry Association	Hrvatska udruga poslodavaca, Udruga drvne i papirne industriju	
HR	DK	Croatian Wood Cluster	Drvni klister	
HU	FAGOSZ	Federation for Forestry and Wood Industries	Fagazdasági Országos Szakmai Szövetség	

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HU	Fabunio	Hungarian Wood and Furniture Union	Magyar Bútor és Faipari Szövetség	
IE	IWFMN	Irish Wood and Furniture Manufacturing Network	Irish Wood and Furniture Manufacturing Network	
IT	FLA	Italian Federation of Wood, Cork, Furniture and Furnishing Industries	FederlegnoArredo	
IT	Unital Confapi	Italian Union Wood Furniture	Unione Italiana Arredi Legno – Confederazione Italiana della Piccola e Media Impresa privata	
IT	CNA Produzione	Italian Confederation of Craft Trades and Small- and Medium-Sized Enterprises	Confederazione Nazionale dell’Artigianato e della Piccola e Media Impresa – Produzione	
IT	Confartigianato Legno e Arredo		Confartigianato Legno e Arredo	
IT	Casartigiani	Autonomous Confederation of Crafts Unions	Confederazione Autonoma Sindacati Artigiani	
IT	CLAAI	Confederation of Free Italian Craft Associations	Confederazione Libere Associazioni Artigiane Italiane	
LT	LM	Association of Lithuanian Wood Industry Companies	Lietuvos medienos pramonės įmonių asociacija ‘Lietuvos mediena’	
LU	FEDIL	The Voice of Luxembourg’s Industry	The Voice of Luxembourg’s Industry	
LV	LKF	Latvian Forest Industry Federation	Latvijas Kokrūpniecības federācija	
MT	MEA	Malta Employers’ Association	Malta Employers’ Association	
MT	CoC	Malta Chamber of Commerce	Il-Kamra tal-Kummerċ Maltija	
NL	EPV	Dutch Packaging and Pallet Industry Association	Nederlandse Emballage- en palletindustrie vereniging	
NL	NBvT	Carpentry Industry Trade Association	Nederlandse Branchevereniging voor de Timmerindustrie	
NL	VVNH	Association of Dutch Timber Companies	Vereniging van Nederlandse Houtondernemingen	
PL	SPPD	Association of Wood-based Panels Producers in Poland	Stowarzyszenie Producentów Płyt Drewnopochodnych w Polsce	
PT	AIMMP	Portuguese Association of Wood and Furniture Industries	Associação das Indústrias de Madeira e Mobiliário de Portugal	
PT	APIMA	Portuguese Association of Furniture and Related Industries	Associação Portuguesa das Indústrias de Mobiliário e Afins	
PT	APCOR	Portuguese Cork Association	Associação Portuguesa da Cortiça	
RO	ASFOR	Association of Forest Workers from Romania	Asociația Forestierilor din România	
RO	APPR	Romanian Forest Owners Association	Asociația Proprietarilor de Paduri din Romania	
SE	TMF	Swedish Federation of Wood and Furniture Industry	Trä- och Möbelföretagen	
SE	Skogsindustrierna	Swedish Forest Industries Federation	Sveriges Skogsindustrier	

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SI	GZS-ZLPI	Chamber of Commerce and Industry of Slovenia – Furniture and Wood Processing Association	Gospodarska zbornica Slovenije – Združenje lesne in pohištvene industrije	
SI	ZDS	Association of Employers of Slovenia – Wood and Paper Section	Združenje delodajalcev Slovenije – Sekcijaza les in papir	
SK	ZSD SR	Association of Woodprocessing Employers of the Slovak Republic	Zvaz spracovatelov dreva Slovenskej republiky	

Notes: Orange shading denotes membership of CEI-Bois (yellow indicates indirect membership). Organisations in bold are business associations.

Source: Network of Eurofound Correspondents, 2021

Annex 2: Sectoral specificities

Table 51: Specificities of employment in the woodworking sector

Member State	Specificities in sectoral employment	Proportion of managerial staff in sectoral employment	Proportion of white-collar workers/blue-collar workers in the sector
AT	The main type of contract in the sector is a standard employment relationship. Subcontracting companies are active in the sector, but are not as predominant as in the construction sector, for example. The working conditions of employees of subcontractors must (by law) be the same as for regular employees, as in principle the same collective agreements apply to all workers. However, checks among posted workers are only rudimentary. The share of self-employed workers in the sector is small (around 7%), and there are hardly any short-term contracts.	3–4%	75%/25%
BE	n.d.	n.d.	A large majority of workers in the sector are blue-collar workers (around 80%, based on KSZ data)
BG	Subcontractors are active in the sector. There are no self-employed workers, seconded workers, part-time workers or seasonal workers. Some workers take up home-based work to increase their income.	5.9%	65%/35%
CY	The vast majority of workers in the sector are employed under standard, full-time conditions. There are no subcontractors in the sector. It is believed that there are a considerable number of self-employed workers in the sector.	5%	80%/20%
CZ	In the woodworking sector, 93.1% of workers are on permanent contracts and 92.4% work full time.	2.9%	79.8% manual workers and 20.2% non-manual workers
DE	A total of 111,299 workers were employed in NACE 16 activities as of 30 June 2020; out of these, 11.4% held a non-standard mini-job contract. The predominant form of employment is standard full time. Data on posted workers and on temporary agency workers employed in the sector are not available.	10% (according to IG Metall)	Around 50%/50% according to microcensus data from 2018 Out of all workers with standard contracts, 64% work in a job requiring

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			vocational training and are therefore considered skilled workers; 22% are classified as 'helpers' (in unskilled jobs); and 13% are classified as specialists or experts
DK	<p>The self-employed account for 3% of the workforce in the woodworking sector.</p> <p>With regard to education, the data available for the woodworking sector are grouped together with the paper and print industries, and workers in the woodworking sector account for only 45% of this workforce. But in this group of sectors half of workers have vocational training and 26% have only a primary education.</p>	Just above 5%	Some 68% are low skilled, 7.5% are medium skilled and 2% are highly skilled (the remainder are managerial staff (5%), self-employed (3%), other workers (9%) or unaccounted for (5.5%))
EE	There is a rather low number of self-employed workers, temporary staff and other non-standard workers.	Probably between 5% and 9%	80%/20%
EL	Some 57% of workers are wage-earning employees and 37% are self-employed. Almost all employees are permanent staff. In addition, the vast majority of staff in the sector are employed in companies with fewer than 10 people (7,132 out of a total of 10,394 employees).	12% of workers are managers, professionals, and technicians and associate professionals	88%/12%
ES	<p>A labour force survey revealed that 75% of workers are wage earners, a lower rate than that registered for the manufacturing sector (89%). On the contrary, 25% of those employed in the woodworking sector are non-salaried.</p> <p>Regarding the types of contract that workers are on, 76% of those employed in woodworking sector companies have a permanent contract and 24% have a temporary contract. This percentage is higher than the average temporary rate for the manufacturing sector (18%).</p>	n.d.	65%/35%
FI	Workers are mostly in permanent, full-time jobs. Employees of subcontractors work mainly in the maintenance or transport sector.	Probably around 30%	Probably around 40%/60%
FR	In the area of joinery and carpentry, which covered 670 companies and 13,600 employees in 2019 (NACE 16.23), the rate of permanent contracts is very high (93%). The activity appears to be very	13% (for NACE 16.23)	57%/30% (for NACE 16.23)

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	<p>industrial, with a majority of skilled and unskilled workers in industrial joinery.</p> <p>The number of managers is lower than the inter-industry average (13% compared with 25% on average).</p> <p>Companies in the sector use apprenticeship contracts in a proportion of 27 contracts per 1,000 employees.</p>		
HR	Data obtained from the Croatian Institute for Pension Insurance on request show that at the end of March 2021 only 111 or 0.68% of all employees worked part time. There are many (around 80%) one-person companies and self-employed workers. Non-standard forms of employment are not so common in the sector.	15%	80%/20% (estimate)
HU	Some 10.5% of workers were part-time employees in Q1 2021.	n.d.	78%/22%
IE	n.d.	< 20%	Mostly blue collar
IT	n.d.	1% of the workforce	65%/35%
LT	<p>Almost 43% of all sectoral employees were employed in small to medium-sized companies (20–99 employees).</p> <p>No information is available on the prevalence of subcontracting or the spread of non-standard forms of employment, including self-employed workers, posted workers or employees with short-term contracts, in the woodworking sector.</p>	n.d.	80%/20% (estimate)
LU	The sector appears to be insignificant because there are only 17 firms.	n.d.	80%/20%
LV	No information is available on subcontractors in the sector. Public sources do not highlight non-standard forms of employment in the sector.	8.5%	80%/20%
MT	Woodworking, as defined by NACE 16, is practically non-existent in Malta, except NACE 16.23 activities, which include the manufacturing of stairs, railings, and doors, windows, shutters and their frames. According to the national employment services provider, Jobsplus, the majority of employees in the woodworking sector (401) are employed on a full-time basis, with a further 31 registered as part-timers.	3.9%	78.3%/21.7%
NL	Subcontractors are active in the sector. Most workers have a full-time or part-time employment contract. There are also a significant number of self-	< 5% (estimate)	80%/20% (estimate)

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	employed people in the sector (between 30% and 40%). Working conditions are not particularly different from other sectors.		
PL	<p>Standard job contracts have predominated in recent years. According to trade union representatives, currently such contracts are the basis for the employment of over 90% of people working in the sector. What is more, the great majority of contracts are open-ended.</p> <p>Temporary agency workers as well as the self-employed currently account for a small proportion of those working in the sector. In the opinion of the trade union representative, there is not a significant number of posted workers – or, more broadly, foreign workers – employed in the sector.</p>	n.d.	n.d.
PT	<p>Some 94% of workers in the sector are employees; only 6% are employers. The share of employers is slightly higher than in the manufacturing sector in general (4%). This is related to the very high share of companies with fewer than 10 workers (75% in NACE 16 and 65% in manufacturing).</p> <p>A total of 73% of workers in NACE 16 have open-ended contracts, an almost identical percentage to that for manufacturing in general (72%). The share of part-time workers in NACE 16 is only 1.4%, close to the average for manufacturing (1.3%) and far below the average for the private sector in general (7.5%).</p>	Share of senior officials in the workforce is 4.2%	65%/35% (estimate)
RO	Although the demand for processed wood products and the value of products delivered each year increased from 2008 to 2019, the wood processing sector is facing an acute workforce shortage, with the average number of NACE 16 employees falling by over 12,000. The biggest deficit is registered among qualified personnel, with the existing labour force ageing and no great prospect of them being replaced. The NACE 16 workforce is dominated by unskilled or low-skilled employees, of whom there are about four times more than highly skilled workers.	6.79%	80%/20% (estimate)
SE	Relative to other sectors, there is a large proportion of standard forms of employment.	5%	About 70%/30%
SI	There are 8,671 employees working in the woodworking sector in Slovenia (the majority of workers work in the manufacture of other builders' carpentry and joinery, and sawmilling and the	20% (estimate)	70%/30%

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	planing of wood) and 795 workers are self-employed. There are not many non-standard forms of employment in the sector.		
SK	Considering the technologies used, working conditions are standard. The number of self-employed workers is rather high.	5–10% (estimate)	80%/20% (estimate)

Note: *n.d., no data.*

Source: *Network of Eurofound Correspondents, 2021*

Table 52: Impact of workforce specificities on organising workers in the woodworking sector

Member State	Impact of workforce specificities
AT	The sector has a high level of organisation among blue-collar employees (60%). Among white-collar workers (who generally have a lower level of organisation), 30% are organised. Organising workers is easier in larger companies than in smaller companies.
BE	The sector is characterised by a very large number of small to very small companies. This makes it generally harder for trade unions to reach out to potential members and thereby acquire members. This is mainly because social dialogue bodies at company level only become obligatory for companies with 50 or more employees (health and safety committee) and 100 or more employees (works council).
BG	According to trade unions, subcontractors of IKEA and other multinational companies conduct anti-trade union activities, for example obstructing trade unions at the workplace. It is difficult to unionise white-collar administrative staff, according to trade unions.
CY	The fact that the industry is dominated by very small companies makes the work of trade unions more complicated. In addition, the number of sectoral workers is decreasing.
CZ	The sector is predominantly made up of smaller firms where there are no unions, while at the same time union organisation is gradually declining in large traditional firms.
DE	The sector is dominated by small companies, which are usually harder for unions to organise.
DK	Generally speaking, the companies in the sector have fixed workplaces and the majority of employees are permanently employed. Some workers are skilled, for example in the furniture or machine carpentry sectors, but the majority are unskilled. It is assumed that the majority of employees are over 40 years of age. Quite a few women are employed in the sector. Regarding the issue of organising workers, there can be challenges in organising young people.
EE	The trade union stated that it is difficult to negotiate collective agreements because the employers are not cooperative.
EL	The characteristics of the sector are quite similar to those of the whole Greek economy. There are high rates of self-employed workers or one-person businesses, which are organised through the sectoral federation for small and very small companies. In addition, 50% of dependent workers are employed in very small or small enterprises, which makes it difficult for unions to organise them.

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	As mentioned above, the great majority of those employed in the sector (7,132 people) work in companies with fewer than 10 employees.
ES	As mentioned before, the only aspects that could make it more difficult for trade unions to organise workers in the sector are the relatively high rates of temporary employment and self-employment. The large share of small companies also makes it more difficult for unions to organise and represent workers in this sector than in other activities in the manufacturing industry.
FI	Employees of smaller enterprises are less likely to be organised by trade unions.
FR	The sector is quite difficult to organise, as it is mainly composed of SMEs. Some 70% of the companies in the area of joinery and carpentry have between 1 and 9 employees, and 23% have between 10 and 49 employees. As 50 employees is the threshold for implementing trade union activities, in 93% of companies trade unions' activities cannot be implemented even if they have members. Only 7% of the workforce is employed in companies with 50 or more employees. But in the largest companies trade union activities are implemented.
HR	Many very small and small companies in the sector have no members of trade unions. As mentioned, many employees have low educational attainment and are also not very interested in joining trade unions. However, Hrvatski sindikat sumarstva (the Croatian Forestry Union) is mostly active in the biggest state company Hrvatske šume (Croatian Wood), and is well organised and influential.
HU	Most of the companies in the sector are small and there is a lot of fluctuation in the workforce, which makes it difficult for unions to organise workers.
IE	Trade union membership is linked to the size and age of the employer: the larger and older the organisation, the more likely it is to be unionised. Most union members are employed in the Coillte group, which includes the company Coillte and Medite Smartply.
IT	In this sector, the main obstacle to trade union activity is the small or very small average size of companies.
LT	A majority of employees work in small to medium-sized companies. Industrial relations are not well developed in the sector.
LU	There are no difficulties to mention.
LV	It is more difficult for trade unions to organise workers in smaller companies than in larger companies. Some large companies have strong histories of unionisation.
MT	Some 51% of employees in this sector work for enterprises comprising an average of 1.3 employees. A further 29% work for enterprises with an average of 18 employees. Only one company employs a total of 97 employees (calculated using Jobsplus data). While the GWU does not represent workers in this sector, it weighed in on this issue by stating that there are three factors making it difficult for unions to organise workers: most enterprises are relatively small; the sector is mostly composed of part-timers, according to the GWU; and the sector has been shrinking due to the flooding of the market with cheaper foreign imports.
NL	Membership of trade unions has been declining for a long time now, which is not specific to this sector. In this sector, the decline in membership of the FNV followed this pattern. There has also been a decline in the membership of CNV Vakmensen, although it seems to have slowed down in the last two to three years. The decline in trade union membership can be at least partly attributed to an improvement in economic performance in the sector and an increase in membership, which offset the decline somewhat. In this sector, the decline in membership

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	seems to be stopping. Organising workers in this sector is not especially difficult compared with other sectors in the Netherlands.
PL	The predominance of standard open-ended job contracts facilitates unionisation, as confirmed by the trade union representatives. They also pointed to the decline in the share of fixed-term contracts as a success of trade unions (although it should be associated primarily with the favourable situation of the labour market from the employees' perspective in recent years). At the same time, in their opinion, the mentality of workers, especially young workers, is not conducive to unionisation; their attitudes tend to be highly individualistic. In addition, not all employers are sympathetic to the unions. The largest producer of wood-based panels, Kronospan, has successfully adopted a policy of eliminating trade unions.
PT	Companies in NACE 16 are smaller than the average size of companies in the manufacturing sector. Some 52.8% of all companies in NACE 16 employ 1–4 people, in contrast to 42.2% in the entire manufacturing sector. The share of companies with 250 or more workers, where union density is usually highest, is only 0.4%, in contrast to 0.9% in the manufacturing sector as a whole. This makes union organisation more difficult. The low level of school attainment, qualifications and wages in the sector in combination with the high share of open-ended contracts may be favourable for union organisation.
RO	Overall, among companies in NACE 16, the vast majority of active enterprises (over 80%) are microenterprises (0–9 employees). These employ only 21.27% of the employees in the sector; therefore, NACE 16 companies often do not meet the conditions for legal representativeness, or the conditions for collective bargaining. The share of microenterprises is slightly higher in NACE 16.2 (83.77%) than in NACE 16.1 (79.01%). In terms of the number of employees, enterprises with 10–49 employees (which are 16% of the total number of active enterprises in the sector) account for more than a third of the sector's employees (34.16%), with companies in NACE 16.1 standing out as having a higher share of employees than those in NACE 16.2 (39.54% compared with 28.84%).
SE	The Swedish woodworking sector is large and includes a high degree of on-site work at sawmills among blue-collar workers and engineers.
SI	n.d.
SK	n.d.

Note: *n.d., no data.*

Source: *Network of Eurofound Correspondents, 2021*

Table 53: Main professions, future needs, the concept of green jobs and the impact of the COVID-19 pandemic on posted workers in the woodworking sector

Member State	What are the main professions/occupations in the sector in your country? What professional skills are likely to be the most needed in the future in the woodworking sector, according to the experts in your country?	Is the concept of green jobs defined in your country? If yes, are the jobs in the woodworking sector included in this definition?	Briefly describe the impacts of the COVID-19 pandemic on posted workers in the sector in your country, if there are any?
AT	<p>The main occupations are wood technicians (engineers), saw technicians (engineers), materials specialists and carpenters.</p> <p>The main problem the sector has is the lack of qualified personnel. The training (apprenticeships, dual system) is of very high quality (by European standards); however, apprenticeships have a major image problem (not only in this sector but in general). There are fewer and fewer young people starting apprenticeships and instead they opt to stay in school for longer. The employment of personnel from other European countries is often quite problematic, as their training standards do not compare to Austrian standards and thus they cannot compensate for the lack of skilled employees.</p> <p>The existing training is deemed sufficient for providing skills for the future, but, especially in the larger industry-type companies, digitalisation skills (design, development, production, prototyping) and engineering</p>	<p>The definition of green jobs in Austria is rather rudimentary ('jobs in the environmental sector').</p> <p>Responses from the interviewees were ambivalent: some stated that jobs in the woodworking sector are considered green jobs; others disagreed. It can be assumed that only a specific share of jobs in the sector can be considered green jobs (those involving 'sustainable building').</p>	<p>The pandemic had some effects on posted workers due to border closures, but not to a very large extent.</p>

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	skills, as well as the combination of these skills, will be needed.		
BE	n.d.	n.d.	n.d.
BG	Specialists, skilled workers, machine operators.	Yes. Those in NACE 16.29 (manufacture of other products of wood; manufacture of articles of cork, straw and plaiting materials) are included.	There are no seconded workers in the sector.
CY	Woodworkers, furniture makers, carpenters. According to experts, knowledge of new production-related technologies is increasingly needed in the sector.	Yes, it is defined. Woodworking is included.	There are no posted workers in the sector.
CZ	In the woodworking sector, the most common occupations are craft workers and repairers (40.9%) and machine and plant operators and assemblers (29.7%). In Czechia as a whole, the proportions of these occupations are 16.0% and 13.7%, respectively.	No.	Employers are addressing the shortage by importing foreign labour, which was less available during the pandemic.
DE	Vocational training is the typical requirement for all occupations in the sector. The Federal Employment Agency does not anticipate a shortage in particular skills, but information technology specialists are looked for, according to information provided by trade unions (Federal Employment Agency, 2020).	The Federal Ministry of Food and Agriculture uses the term 'green jobs' and presents a list of 14 of these jobs; woodworking is not one of them. The Federal Employment Agency does not give a list of green jobs.	n.d.
DK	The largest group in the woodworking sector is NACE 16.23 (manufacture of other builders' carpentry and joinery), accounting for 66% of the	Yes. 3F has a website (groennejobs.dk) dedicated to the development of renewable energy and new	n.d.

	<p>workforce and 46% of the workplaces. The second largest with regard to workforce is NACE 16.29 (manufacture of other products of wood), accounting for 17.5% of the workforce. The second largest in terms of the number of workplaces is NACE 16.24 (manufacture of wooden containers), accounting for 8%.</p> <p>According to CO-industri, the workforce in the furniture and woodworking sectors mainly consists of skilled woodcutting machinists (<i>maskinsnedkere</i>) and cabinet makers (<i>møbelsnedkere</i>), as well as trained woodworkers (<i>tillærtetræindustriarbejdere</i>). A limited number of temporary workers are also present.</p> <p>It is estimated that there will be a need for more woodcutting machinists in the future.</p>	<p>energy technologies, through which it aims to create and maintain jobs in Denmark. The organisation proposes ways for companies to usefully involve employees in energy-saving measures, thus helping to reduce companies' energy costs. However, it is mostly in the wood production industry that jobs are seen as green. Nevertheless, the concept of green jobs is linked to woodworking, as its products store CO₂ throughout their life span and replace energy-intensive materials such as steel and concrete.</p>	
<p>EE</p>	<p>According to the OSKA analysis from 2016, most employees in the sector (woodworking and furniture) are skilled workers (e.g. carpenters, line operators, CNC operators), followed by specialists (technologists, developers, designers). The future needs in the woodworking and furniture sector comprise two-thirds vocational skills and one-third higher education skills. In order to ensure growth in production and competitiveness, more product developers, technologists and technicians are needed. In addition, information and</p>	<p>The concept has not exactly been defined, but there have been discussions about it. However, different policy documents do refer to the green economy and to the fact that woodwork plays an important role in it.</p>	<p>There is nothing to point out, as the number of posted workers is low and the organisations did not have any impact.</p>

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	communications technology skills will be needed in order to ensure technological development.		
EL	The main profession in the sector is craft workers (6,839 people are in this role, the majority of whom are skilled or semi-skilled).	In Greece, the concept of green jobs has been defined. Green professions in the woodworking sector are not included.	According to information from representatives of very small enterprises, the COVID-19 pandemic had no particular impact on the sector. There is no information or data on posted workers.
ES	The sources consulted and the actors interviewed all point out a lack of skilled manual woodworkers. This has become one of the main problems facing the sector. In order to solve this situation, trade unions and employers have asked for an increase in the number of positions in the vocational training system.	Some companies in the sector have developed initiatives to green their factories and processes, including the intermediate products. But there is no widespread use of the term 'green jobs' or awareness of such jobs.	No impact has been reported.
FI	Sawmill process operators, process operators and plywood workers. Information and communications technology skills, language skills and knowledge about wood will be needed.	Green jobs are not defined in Finland.	According to the Industrial Union, there has not been any impact.
FR	The increasing hybridisation of materials between wood, metal and plastic has led to the broadening of the skills needed in addition to traditional woodworking skills. At the same	Yes, the concept exists but jobs in the woodworking sector are not included. However, the sector is recognised as an important contributor to meeting the	The impact of the COVID-19 crisis on the planning of wood production was significant, according to Opco

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	<p>time, this traditional competence must be preserved, in particular engineering, prefabrication skills and assembly skills.</p> <p>In order to cope with these changes, suitable training courses have been developed and new certificates of professional qualifications were created and issued by a professional branch that attests to the mastery of skills related to trades. These facilitate the hiring of young people and the development of workers' professional careers. The certificate 'Industrial joiner, window and door manufacturing' is being created for this purpose.</p> <p>The branch is also working on updating the skills repositories of the main diplomas that it offers. Finally, the development of digital tools such as building information modelling also requires the development of new skills for both large and small companies.</p>	<p>new energy-saving requirements in the construction sector.</p>	<p>2i, with some activities in the construction sector halted in Q2 2020.</p>
HR	<p>The most common occupations are semi-qualified and qualified forest nursery workers, forest growers, forest loggers, firewood sawmill workers, lumberjacks, and woodworking machine setters and operators. Experts expect an improvement in the education and qualifications of employees as they use new machines, but this will not take place in the short term.</p>	<p>No. There is a document titled <i>Strateške odrednice za razvoj zelenog gospodarstva (Strategic determinants for development of green economy)</i>, but it does not define the concept of green jobs.</p>	<p>The woodworking sector in Croatia suffered seriously during the COVID-19 pandemic, primarily due to decreased demand for furniture and problems with transport. Citizens of countries in the European Economic Area and members of</p>

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		<p>their family with a right to stay in the Republic of Croatia have the same rights as citizens of the Republic of Croatia under the provisions of the Treaty on the Functioning of the European Union. This means that citizens of European Economic Area countries and members of his/her family can work in the Republic of Croatia without a residence permit and without a work permit, which are issued in accordance with the regulation governing the stay of third-country citizens.</p> <p>Temporary residence can be granted to citizens of third countries (i.e. non-EU countries) or countries that are not members of the European Economic Area or Switzerland, who intend to stay, or are staying, in the Republic of Croatia for the purpose of,</p>
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			<p>among other things, work, including as posted workers. For the occupations for which there are shortages (primarily in the building and tourism sectors), employers are not obliged to ask permission from the Croatian Employment Service. The occupations in the woodworking sector are not on this list, but there are not many posted workers in this sector.</p> <p>No official data are available on the share of workers in this sector in Croatia who are from another EU Member State, or from a non-EU country, but according to the discussion with experts for the sector it is estimated that it is not significant.</p>
HU	The main professions are machine operators, logistics and warehouse staff, and unskilled workers. In the future, professions will involve more IT	There is no official definition of the term 'green jobs'. There is a group of 'creative sectors' in which woodworking has been	There are not many posted workers in this sector. Those who were affected by

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	skills (for example, programmers) and skills in operating other digital machinery.	included owing to its design elements.	border closures due to COVID-19 typically either returned to their home country (if this was possible) or stayed in the foreign country for a longer period. There are no hard data for this.
IE	No specific information on skillsets was obtained.	Yes, Coillte has a renewable energy division.	The specifics in the industry are unknown.
IT	The main sought-after professions are export managers and specialised blue-collar workers.	The concept is not defined in Italy.	Posted work does not seem to be a significant issue in the sector, and no specific impact was reported by the interviewees.
LT	The most demanded and growing professions/occupations are wood processing machinery operators – often professionals able to work with modern equipment – with some digital skills.	A particular definition is not used, but the largest woodworking companies declare the objective of focusing on environmentally friendly solutions.	There is no information on posted workers in the sector.
LU	It is impossible to say. The sector is really insignificant.	Yes, it is. Woodworking sector employees are included.	There are no posted workers in the sector, according to trade unions.
LV	The following number of posts are occupied (with profession codes in brackets) in the country: <ul style="list-style-type: none"> • auxiliary worker (932909) – 3,044 • woodworking equipment operator (752314) –1,985 	Green jobs are not defined in Latvia.	No information is available about posted workers in the sector, or on the impact of the COVID-19 pandemic on posted workers.

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	<ul style="list-style-type: none"> • sawmill operator (817205) – 1,043 • wood materials processor (752206) – 857 • forklift driver (834402) – 737 • carpenter (752201) – 687 • workshop worker (932908) – 623 • sawing operator (817209) – 566 • timber manufacturing operator (817213) – 551 • board member (112014) – 527 <p>The Ministry of Economics has prepared forecasts of labour demand and supply in the woodworking industry. According to the ministry, by 2027 the sector will need 19% more workers in professions requiring higher qualifications. The forecasts predict that the sector will employ more forestry masters/forest technicians, operational managers/directors in the field of forestry, forestry and woodworking engineers, woodworking technicians and wood manufacturing technicians.</p>		
MT	<p>The main profession in this sector, as listed by Jobsplus, is craft and related trades workers, making up a total of 229 employees.</p>	No.	<p>Data are unavailable; however, according to the GWU, it is extremely unlikely that there are</p>

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			posted workers in this sector.
NL	<p>These professions differ by subsector, but the following are some examples of activities carried out in different professions in the carpentry subsector:</p> <ul style="list-style-type: none"> • pre-assembly and final assembly • plastics processing • woodworking • paint shop activities • timber frame construction • building assembly • warehouse work/transport • work preparation/calculation • technical services • production management • ICT/automation 	<p>The concept is not defined in the Netherlands, but is used in some of the available definitions of the International Labour Organization, United Nations, European Commission and Eurostat. A big challenge is making these green jobs actually sustainable.</p>	<p>The COVID-19 pandemic does not seem to have affected posted workers in this sector more than other full- or part-time employees.</p>
PL	<p>According to trade union representatives, the most common category of occupations is machine operators.</p> <p>It seems that there are no expert assessments directly related to the sector regarding the demand for occupations in the future. At the same time, the Ministry of Education has for several years been publishing announcements forecasting the demand for employees in professional education occupations on the national and voivodeship labour markets. These documents concern only vocational</p>	<p>Although research on green jobs is being conducted in Poland, there is no consistent legal definition of them. Trade union representatives were not able to directly address this concept. They indicated certain areas of activity related to the protection of the natural environment and health, such as the elimination of formaldehyde from production and the use of secondary raw materials and post-production waste in companies manufacturing wood-based panels.</p>	<p>No information is available on this issue with regard to the woodworking sector. Trade union representatives were not able to address this problem, justifying the lack of information by highlighting the low share of foreign workers in total employment. One of them mentioned a</p>

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	<p>education occupations and therefore do not include occupations requiring higher (tertiary) education. On the basis of an announcement of 1 February 2021, it seems that woodworking machine operators may be sought after in the coming years. Electricians are also mentioned. This confirms the assessment of the trade union representatives, who indicated the current demand for positions in this occupation, as well as others related to maintenance and technical service jobs.</p>		<p>significant number of returns to the country of origin in April and May 2020, although some employees have stayed in Poland. However, this information concerned the construction sector, in which the trade union is also present.</p>
PT	<p>The share of workers with a secondary or higher school grade is 30.5% and the share of highly qualified professionals is 2.1%. These indicators are far below the averages in the manufacturing sector (29% and 6.6%, respectively). Statistics from the Ministry of Family, Labour and Social Policy (Quadros de Pessoal) show that the share of workers with a secondary or higher school grade is 30.5% and the share of highly qualified professionals is 2.1%. These indicators are far below the average in the manufacturing sector (29% and 6.6%, respectively).</p> <p>In 'Professionals in cork, wood, pulp and paper', a brochure from the national public employment service (IEFP, undated), the main occupations for the wood industry are carpenter, joiner, wood, construction design technician,</p>	<p>The concept generally used in Portugal is the one developed by the United Nations Environment Programme and by the International Labour Organization.</p> <p>Woodworking does not appear in the group of sectors that are discussed as most likely to generate green jobs.</p>	<p>In general, during the pandemic, posted workers benefited from the same rights as all other workers in Portugal, including those resulting from measures approved in the context of the COVID-19 pandemic, namely:</p> <ul style="list-style-type: none"> • sickness allowance due to prophylactic isolation imposed by the Health Delegate • exceptional family support for employees • assistance to children and grandchildren due to

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	<p>wood processing machinery technician, and wood finishing and furniture technician. For the cork industry, the main occupations are cork preparer, cork processor operator, production manager and technician for the cork industry.</p>		<p>prophylactic isolation imposed by the Health Delegate</p> <ul style="list-style-type: none"> • in the case of self-employed workers, allowance for illness due to prophylactic isolation imposed by the Health Delegate • exceptional family support for self-employed workers • extraordinary support for the reduction of the economic activity of self-employed workers <p>No information regarding the impact of the pandemic on posted workers in NACE 16 was found.</p>
RO	<p>By occupation group, workers with elementary occupations have the largest share in the total number of full-time employees in NACE 16 (almost 36%), followed by craft and related trades workers (22.39%) and plant and machine operators and assemblers</p>	<p>Not at the moment.</p>	<p>There is not a significant number of posted employees in the sector.</p> <p>No information is available on the</p>

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	<p>(15.14%). The occupation groups with the lowest weights are skilled forestry workers (2.15%), followed by service and sales workers (3.48%) and technicians and associate professionals (4.42%). Professionals represent only 5.17% of the total number of full-time employees in the field.</p> <p>There is currently a shortage of skilled labour force in this sector. In 2015–2019, the number of employees in active enterprises in the sector decreased by over 8,000 people (representing 15%). Trying to break this downward trend, decision-makers have taken steps to train and attract young engineers and workers to the sector by developing vocational schools in a dual system (in partnership with economic agents in the field), as well as by increasing the attractiveness of the universities offering degrees in the sector, which in recent years have had many vacancies. This problem is all the more important as a significant share of the workforce in the field is approaching retirement age and many Romanians prefer to work abroad.</p>		effects of COVID-19.
SE	<p>The immediate need in the coming three years is for more blue-collar workers, as a historically high number of these workers are reaching pension age in the woodworking sector.</p>	<p>The definition is from the United Nations Environment Programme. The forestry sector is included, and environmental work is done within the woodworking sector in conjunction with the forestry sector.</p>	<p>No information is available on posted workers.</p>

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	<p>The most in-demand skill in the future is predicted to be knowledge of CNC machines.</p> <p>Source: TMF, undated</p>		
SI	<p>The majority of employees (5,915) have a high school education (4,864 men and 1,051 women) and work as woodworking technicians, while only 1,217 have a university degree. Women make up almost half of engineers (469 compared with 748 men).</p> <p>As reported by the Biotechnical Faculty of the University of Ljubljana, the professional skills most needed in the future will be related to woodworking design; restoration work, especially for buildings and interior furniture; the extension of buildings using wooden structures and the related development of new wood composites; wood processing with computer-controlled machines and robots; and the introduction of nanotechnology in woodworking.</p> <p>The Ministry of Economic Development and Technology stresses that all projects related to the digitalisation of the wood industry and its promotion in public tenders are intended to increase the export of products with higher added value. Since 2015, when the Wood Industry Directorate was established, 94 projects have been supported, and 165 woodworking companies and the rest of the</p>	<p>Yes. Green jobs also include employment in the wood processing industry. The processing of wood assortments into semi-finished products and products is relatively energy intensive.</p> <p>The woodworking industry is one of the priority sectors in the green economy in Slovenia, along with organic farming, renewable energy sources and efficient energy use, sustainable tourism and social entrepreneurship.</p>	<p>According to the director of GZS-ZLPI, there are not many posted workers in the sector.</p>

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	wood industry have received over €10 million in grants. There are also special incentives for SMEs for the development and introduction of new products in the woodworking sector as part of Industry 4.0.		
SK	According to the ZSD SR, the main professions/occupations in the sector are workers in sawmills and carpenters. These professions will also be needed in the future. But it is assumed that their work will be affected by automation and that carpenters will use CNC machines more.	No information is available about the definition of green jobs in the woodworking sector.	According to the information available, it had a minimal impact.

Note: *n.d., no data.*

Source: *Network of Eurofound Correspondents, 2021*

Table 54: Minimum number of employees needed in order to establish employee representation bodies in a company in the woodworking sector

Member State	Is there a minimum number of employees needed in order to establish employee representation bodies in a company?
AT	Yes, the number lies at five employees per company and is the same regardless of the sector.
BE	No.
BG	According to the Labour Code, national representative employer organisations are those with more than 50,000 workers and at least 1,500 members, or more than 100,000 workers.
CY	As with all sectors, the minimum number of employees needed in order to establish employee representation for matters of health and safety is five.
CZ	The same rules apply to the establishment of a trade union and works council for all sectors of the national economy. Three employees are needed to establish these bodies.
DE	Yes, five workers.
DK	In the main collective agreement for this sector (woodworking and furniture), it is stated that for each enterprise – in the case of larger enterprises usually within each department – a representative is to be chosen from and by the employees. If one department has fewer than six employees, they may join another department's

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	election and representativeness if agreed by both sides. The contact for CO-industri, however, states that the minimum number of employees is five.
EE	No.
EL	According to Law No. 1264/1982, companies with at least 21 employees have the right to establish a trade union and get validation from the court. This form of union is called the 'primary union' (the fundamental form of union organisation), which organises individual (physical) people in a profession, in a sector, in a service or in a company/establishment. Compliance with this regulation is obligatory for all the sectors.
ES	Yes; the minimum is 10 employees. The number is the same for all sectors of the economy.
FI	Yes; the minimum is 150 employees, regardless of the sector.
FR	A works council (social and economic committee) must be set up in companies with at least 11 employees. It is only compulsory if this number of employees is present for 12 months, which must be consecutive.
HR	The number is the same for all sectors and is 20 employees.
HU	Yes, the same as in any sector. At least 10% of the total number of employees is needed to form a trade union. To form a works council (<i>üzemi tanács</i>), members are elected by workers. They have a right to conclude a 'plant agreement', which under specific conditions can also regulate working conditions, except wages. Works councils can be established in companies with at least 50 employees (non-mandatory). One plant representative (<i>üzemi megbízott</i>) is elected if the number of employees is below 50.
IE	No.
IT	Yes; the minimum is 15 employees. The threshold is set by law independently of the economic sector.
LT	No.
LU	Yes; 15 people are required for all sectors (Article L.411-1 of the Labour Code).
LV	The Law on Trade Unions states: <i>The number of persons who establish a trade union of an undertaking cannot be less than 15 or less than one fourth of the total number of the persons employed at the undertaking that, on the other hand, cannot be less than five employees.</i> This number is the same regardless of the sector.
MT	The main criteria for union representation regardless of union or sector is that its members comprise the majority of the employees (50% + 1) of a section of the company. A union does not need to be formed by a majority of all the workers from all the different sections within a company. Furthermore, different unions can represent different sections or types of workers within the same company. For

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	example, you might have union 'X' representing blue-collar workers and union 'Y' representing white-collar workers within the same company.
NL	<p>Companies with fewer than 10 employees are not required to establish an employee representation body but can voluntarily set one up.</p> <p>Companies with 10–50 employees are required to establish an employee representation body if the employees ask for it. They can also voluntarily establish a works council.</p> <p>Companies with 50 or more employees are required to establish a works council.</p> <p>These rules are the same for every sector.</p>
PL	Yes, the threshold for establishing a company trade union organisation equals 10 employees and is the same as for all sectors of the Polish economy. The threshold for works councils is 50 employees for all types of companies.
PT	There is no minimum number of employees needed in order to establish a trade union representation body or a works council (<i>Comissão de Trabalhadores</i>).
RO	Company-level trade unions are an option only in companies with at least 15 employees.
SE	No.
SI	<p>Yes; according to the Workers' Participation in Management Act (2007), in companies with 20 employees or more with a right to vote, workers have a right to constitute a works council. In companies with fewer than 20 employees, workers can participate in management through shop stewards.</p> <p>The number is the same regardless of the sector.</p>
SK	Yes; at least three employees is the general rule.

Source: Network of Eurofound Correspondents, 2021

Table 55: Characteristics of companies in the woodworking sector

Member State	Characteristics of companies	Do the size, characteristics and specificities of the companies in the sector make it easy or difficult for employers/business organisations to organise the sector?
AT	<ul style="list-style-type: none"> i. Are the companies in the sector mainly active in one specific type of woodworking activity, or do they mostly combine several or all kinds of woodworking activities? ii. Do the companies active in the woodworking sector in your country usually own the forests from which the wood is cut? iii. Are there special types of companies in this sector? 	Due to mandatory membership of all sectoral companies with the Federal Economic Chamber (WKO) and its respective sectoral subunits, there is 100% density.
BE	<ul style="list-style-type: none"> i. No data are available; given the large amount of small to very small companies, it can be expected that most of them are quite specialised in their own activity. ii. No data are available. iii. Unclear what special types of companies are. 	No concrete proof or reports of organisation by employer organisation being any harder or easier within the woodworking sector than within others.
BG	<ul style="list-style-type: none"> i. Most companies combine several types of woodworking activities. ii. Due to state regulations, 38% of the forest is timber-producing forest and 62% is protected territory. Some 11% of forests are privatised, while 73% are state forests and 13% are municipal forests (U.S. Department of Agriculture 	No information is provided by unions or employer organisations on this matter. It might be said that the initiative to join an employer organisation depends on employers' attitudes to such bodies.

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	Foreign Agricultural Service, 2017). Companies either own the forests or use the wood from forests in private hands.	
CY	<ul style="list-style-type: none"> i. Some are active in one specific type of activity, while others combine several kinds of activities. It is noteworthy that several companies in the sector may be active in both woodworking as well as furniture activities. ii. No, most forests are owned by the state. iii. No. 	No particular difficulties were reported in organising employers and companies in the sector, except for micro family woodworking enterprises, which indicate some difficulties in this respect.
CZ	<ul style="list-style-type: none"> i. Both large traditional firms and smaller firms operate in the sector. Many of them are owned by large multinational companies (Stora Enso, Kronospan). A number of small entrepreneurs are also active in the sector. Firms active in NACE 02 are often also active in NACE 16.1 – that is, they operate sawmills. ii. Companies active in the woodworking sector usually do not own forest stands, but provide services to forest owners where the state is the majority owner. 	A factor that could limit union organisation in the sector is the high proportion of small firms, which are traditionally characterised by low or no union organisation.
DE	<ul style="list-style-type: none"> i. Most companies operate in more than one subsector. ii. Companies do not have to own the forests from which the wood is cut. Nearly half of forest land is owned by private owners, and around 30% is owned by the federal states. The rest is owned by local 	Many companies in the sector employ fewer than 50 employees. Smaller companies are less often members of an employer organisation.

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	<p>municipalities, by churches or by the federal republic.</p>	
DK	<p>i. Within the business association TMI, which is part of DI, the member companies are categorised in three main subgroups, with those being 'wood industry', 'building materials and windows' and 'kitchens and furniture'. There may be special interests in the different groups, but, in general, the interests coincide.</p> <p>ii. The woodworking sector in Denmark (including wood production and woodworking) is scattered all over the country, but is most often present outside the larger cities. The woodworking industry is especially present in North Jutland. Wood is mostly imported, and wood from Sweden in particular is used in the Danish wood and furniture industry.</p>	<p>n.d.</p> <p>The contact person did not answer this question, but, as far as we are aware, no specificities or conditions of this nature make it neither more difficult nor easier to organise the sector. In general, in the Danish labour market, the larger the companies are the more frequently employees are covered by collective bargaining agreements.</p>
EE	<p>i. The companies tend to concentrate on one (or sometimes two) types of woodworking activities (e.g. only sawmilling and planing or only the manufacture of veneer sheets).</p> <p>ii. The companies usually do not own the forests. A large share of forests are owned by private natural persons in Estonia or by the state forest management organisation.</p>	<p>According to both the business organisations in this study, it is rather easy to organise the sector. The level of competition between the companies is rather low due to export orientation because it is in their mutual interest to be competitive in order to export. In addition, the business organisations work together and their cooperation is very good.</p>
EL	<p>i. There are no data or any special surveys in Greece on the characteristics of companies. However,</p>	<p>The sector's companies are organised mainly based on their size and their types of activities. The small and very small enterprises are usually organised in a</p>

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	<p>according to representatives of the sector, the majority of companies, regardless of their size, are mainly active in one specific type of woodworking activity.</p> <p>ii. In Greece, it is not usual for companies in the woodworking sector to own the forests from which the wood is cut.</p>	<p>national federation that is a member of the GSEVEE, while some bigger companies are organised in the PSX.</p> <p>According to the estimates of the president of POVSKX, one of the problems faced by professionals in the three sectors is that they are not covered in case of illness and accident by a social security fund (whereas all other self-employed professionals are).</p> <p>Another important problem in the industry is the lack of corresponding vocational education in the professions and specialities of the three sectors. Especially in some job specialities in the woodworking sector, there is no provision for vocational education. Therefore, most professionals in the three disciplines (NACE 16, 31 and 43.32) are practically trained on the job.</p>
ES	<p>Companies in the woodworking sector are small in terms of employment, with an average of 4.4 workers per company. This number has been declining in recent years. The average size of woodworking companies is considerably lower than the average for the manufacturing sector (nine jobs on average per company).</p> <p>Some 37% of the companies in the woodworking sector do not have salaried employees, 31% have 1 or 2 salaried employees and 15% have between 3 and 5 employees. Most companies are small to medium sized.</p>	<p>The small size of companies on average in the woodworking sector, with an increase in the number of companies with 1–2 employees in recent years, is one of the factors that make it difficult for employer organisations to organise the sector.</p>
FI	<p>i. At least the bigger companies in this sector (e.g. Versowood, UPM) have activities in several parts of the sector.</p> <p>ii. No, a large part of the forest is owned by private forest owners.</p> <p>iii. According to our best understanding, no.</p>	<p>In the mechanical engineering sector (covering parts of the woodworking sector), the largest employer organisation – the Finnish Forest Industries Federation – has decided to shift to local-level collective bargaining (similar to collective bargaining at company level) when the current collective agreement runs out. This could decrease the will of companies in this sector to organise.</p>

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		Local bargaining is considered by the employer organisation to be more flexible and it considers the circumstances of a company or even a specific production unit much better than a sector-level agreement would (Uutiset, 2020).
FR	<p>i. No data. Combinations of activities exist in the large companies, but it seems that most players have one main activity. On the other hand, as part of its joinery and carpentry activities, the joinery and carpentry branch is increasingly integrating metal and plastic joinery activities.</p> <p>ii. No.</p> <p>iii. No.</p>	As the sector is composed of many SMEs, it is more difficult for employer organisations to organise companies. But employer organisations exist for each kind of activity to protect the interests of companies, which may give employer organisations some attractiveness even if some SMEs could be reluctant to pay fees to them.
HR	<p>More than 80% of all enterprises are microenterprises or very small enterprises and have fewer than 9 employees. Around 16% of all enterprises have between 10 and 49 employees, while only 8 or 0.49% of enterprises have more than 250 employees. The biggest state-owned company, Hrvatske šume, employs almost 8,000 workers.</p> <p>ii. In Croatia, the companies active in the woodworking sector usually do not own the forests from which the wood is cut but instead buy it from Hrvatske šume.</p>	As mentioned, Hrvatske šume is a state-owned company. It is probably more demanding for microemployers and small employers who are not willing to be active members of employer associations.
HU	<p>i. Mixed: some are specialised in panels and flooring; some do a mix of activities.</p> <p>ii. The majority of forests are state owned. It is not known whether there is an overlap between forest ownership and the woodworking sector in the private sector.</p>	One employer organisation interviewed said that there was no particular difficulty in organising companies; the other employer organisation seems to be less active and not as motivated to organise them.

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	iii. No.	
IE	ii. Coillte manages most of the forested area in Ireland. The correspondent was not sure of the proportion that it owns but it might be smaller than the proportion of forests it manages.	The industry is dominated by Coillte group; it is hard to obtain patterns outside Coillte.
IT	i. Companies in the woodworking industry tend to be very specialised in one specific activity.	Nothing specific was highlighted by the employer organisation.
LT	<p>i. Companies in the sector are mainly active in one specific type of woodworking activity. Usually larger companies operate in such subactivities as sawmilling and the planing of wood, manufacture of veneer sheets and wood-based panels, and manufacture of assembled parquet floors, whereas the smaller ones operate in the manufacture of other builders' carpentry and joinery activities.</p> <p>ii. Usually companies active in the woodworking sector in Lithuania do not own the forests from which the wood is cut.</p>	It is probably not so much the 'size, characteristics and specificities of the companies' that matter, but the specificities of their activities. In order to have more influence on wood- and forest-related public policies, companies are willing to have a stronger voice and are joining employer organisations/business associations.
LU	i. The companies in the sector are mainly active in one specific type of woodworking activity.	There are no employer organisations/business organisations in the sector.
LV	i. Focusing on one specific type of woodworking activity or combining several woodworking activities very much depends on the company. There are several	The employer organisation often mentions its capacity as a barrier to attracting new members. As usual, small companies (0–9 employees) are more difficult to organise.

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	<p>large companies focused on one type of activity; for example, Latvijas finieris manufactures plywood and Kronospan Rīga produces particle boards. Some others are more diversified in their activities, for example producing dried, planed and impregnated lumber, cross-glued panels, terrace boards and pellets.</p> <p>ii. Companies active in the woodworking sector in Latvia usually do not own the forests from which the wood is cut.</p> <p>iii. There are no special types of companies in the sector.</p>	
MT	<p>i. The majority of companies that do woodworking (specifically the manufacturing of wood apertures) also manufacture furniture.</p> <p>ii. No. With just 1.5% of its land mass covered by trees (the least in the EU), Malta hardly has trees, let alone forests.</p> <p>iii. No.</p>	<p>The Malta Employers' Association does not have members that are specifically in the woodworking sector, as the same enterprises also manufacture furniture. The association has Malta's biggest manufacturer of wood apertures among its members.</p> <p>The Malta Chamber of Commerce said that it does not have members from the woodworking sector.</p>
NL	<p>i. There are many different types of companies in this sector. They mostly combine several kinds of woodworking activities.</p> <p>ii. No, most of the wood is imported.</p> <p>iii. No.</p>	<p>As indicated, there are a lot of small companies in the sector, but this does not seem to make it difficult for employers/business organisations to organise the sector.</p>
PL	<p>i. It seems that most large entities specialise in one production area, or combine sawmill activity with the</p>	<p>It seems that the sector does not stand out in the national economy in this respect. In addition to the numerous SMEs, there are several dozen large companies, some of</p>

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	<p>production of more advanced products. Companies producing various types of wood-based panels constitute a strong group.</p> <p>ii. There is no precise information available on the sources of wood supply for individual sawmills. However, the main supplier of timber to the domestic market is the State Forests National Forest Holding.</p> <p>iii. No special types of companies in this sector have been identified.</p>	<p>which, representing manufacturers of wood-based panels, are associated with a business organisation. At the same time, as in most other sectors, companies are not interested in entering into multi-employer collective bargaining, and thus in establishing an employer organisation.</p>
PT	<p>i. Data from the National Statistics Institute for 2019 show that 32% of the workforce in NACE 16 work in the subsector NACE 16.23 and 37% work in NACE 16.29. Approximately 80% of the workers in NACE 16.29 work in the cork industry. Some 17% of the sector's workforce are in NACE 16.10, 7% are in NACE 16.21, 1% are in NACE 16.22 and 6% are in NACE 16.24.</p>	<p>The large share of very small companies does not favour the organisation of the sector in employer organisations. Nonetheless, administrative data from the Ministry of Labour (Office for Strategy and Planning) from 2012 indicate that the organisational degree of the sector is slightly above the general average. In 2012, 22% of the companies in NACE 16 were affiliated to employer associations, a bit more than in the whole private sector (18.4%). These companies employed 43% of the workforce in the sector (in the whole private sector, the percentage was 38%).</p>
RO	<p>i. Mainly active in one specific type of woodworking activity. For example, the largest employer in the sector (Schweighofer) develops the activity in NACE 16.1, but secondarily also carries out activities in bioenergy and real estate business.</p> <p>ii. No, most of them are wood processing companies, they do not own forests. For example, the largest employer in the sector (Schweighofer) buys</p>	<p>NACE group 16 is characterised by a very large share (over 80%) of microenterprises, with fewer than 10 employees. Only 0.3% of the active enterprises in this sector are large enterprises, with 250 or more employees. However, these concentrate a fifth of the labour force of the sector (20.38% in 2019). The share of large enterprises is three times higher in NACE 16.2 than in NACE 16.1. The only employer organisation in the sector has more than 1,500 company members, of all size classes</p>

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	<p>wood from owners such as Romsilva (the largest supplier of raw materials for the wood industry). The Austrian group Schweighofer owned over 14,000 hectares of forests through its subsidiary Cascade Empire, but sold them in 2018 to the Swedish company GreenGold Group (see Ziarul Financiar, 2015).</p> <p>iii. No.</p>	<p>and from almost all parts of the sector (except NACE 16.24).</p>
SE	<p>ii. Half of all forest land in Sweden is owned by individuals, and 25% is owned by private holding companies. Usually, sawmills work in conjunction with them, and then there are clusters of small companies surrounding the sawmills.</p>	<p>The 20 largest companies are responsible for 80% of the total production of sawed products.</p>
SI	<p>Slovenia has no large industrial wood plants any more, but the number of small and medium-sized companies represents two-thirds of employees.</p> <p>The President of the Furniture and Wood Processing Association at the Chamber of Commerce and Industry of Slovenia is positive and believes that the wood processing industry, through good cooperation with the forestry sector, can become one of the fastest growing industries in Slovenia, creating new green jobs.</p> <p>Added value per employee is higher in the woodworking sector than in the furniture sector, since there is more automatisated work, labour costs are lower and companies can invest more in development.</p> <p>According to the Wood Industry Directorate, the vision of the Ministry</p>	<p>No.</p>

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	of the Economy, Tourism and Sport is to increase the number of employees to 20,000 and the sales realisation of the wood processing industry in the amount of €2.5 billion by 2030.	
SK	<p>i. The largest number of companies operate in NACE 16.10 (almost 2,000), followed by those in NACE 16.29, with about 1,300 companies, and NACE 16.23, with about 1,100 companies. Most of the companies are microcompanies and small companies, with 5,365 and about 5,000 employees, respectively. There are only four large companies, with around 1,260 employees. Some sawmills also own forests.</p>	According to the ZSD SR, such specificities don't exist in the sector. The main problem of organising employers in the sector is that the membership of employers in employer organisations is voluntary.

Note: *n.d., no data.*

Source: *Network of Eurofound Correspondents, 2021*

Table 56: National/local regulations related to noise prevention

Member State	How are the national/local regulations related to noise prevention impacting the companies in the sector?
	<p>Are there cases of companies that have had to relocate their facilities due to noise regulations? Are there any other type of regulations affecting the sector?</p>
AT	<p>The increased rezoning of commercial zones to residential areas (densification) has led to more and more complaints from residents. This leads to extreme distortions and not infrequently to interventions by the authorities. In order to comply with the required limit values, sometimes enormous investments have to be made. It can happen that plants are not allowed to operate in certain locations.</p> <p>Regulations on wood dust are also an issue in the wood industry.</p> <p>Other regulations, for example, concern the protection of employees (occupational exposure).</p>
BE	<p>There are a few cases where fines were imposed on companies that produced excessive noise outside of the hours they are allowed to (before 7:00 and after 19:00). I was not able to find any forceful relocations.</p>
BG	<p>Positive, helping to maintain a good working environment.</p>

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CY	The majority of woodworking shops are small and did not have to move, while the larger companies have always been located outside city limits.
CZ	The main regulation in the field of occupational health protection at work in relation to noise is Government Regulation No. 272/2011 Coll. on the protection of health against the adverse effects of noise and vibration. This government regulation distinguishes three healthy limits of noise exposure: maximum steady noise (85 dB), background noise not generated by work activities (70 dB), and noise at the workplace where work demanding attention and concentration is performed (50 dB). The standard is valid for all sectors of the national economy. There are no known cases of the relocation of a company due to noise regulations.
DE	There is no sector-specific regulation; the sector is covered by the Act on Emission Prevention. Please see the forthcoming 2023 representativeness study on the furniture sector for more details.
DK	<p>The contact person from TMI, Simon Auken Beck, was not aware of any company locating because of noise regulations, but states that it is a challenge that must be taken care of on an ongoing basis. There are many regulations and executive orders that affect companies in the sector. Other regulations could be, for example, the Waste Executive Order and the Biomass Executive Order.</p> <p>Unfortunately, we were not able to collect further information on this from the contact, but the following can be gathered through the web.</p> <p>A revised waste executive order entered into force on 1 January 2021 (<i>Affaldsbekendtgørelsen</i>),¹⁴⁵ which means new statutory requirements for companies (Article 61) on the sorting of a minimum of 12 types of waste for recycling. The revised order is rooted in a political desire for a greener Denmark and a climate-neutral waste sector by 2030. The municipal waste inspectorate can request documentation for waste handling.</p> <p>One can estimate that such regulation will demand more, for example, time, efforts, space, funds and documentation from the company.</p> <p>The Biomass Executive Order (<i>Biomassebekendtgørelsen</i>)¹⁴⁶ will probably have similar effects.</p>
EE	Nothing important to point out here. No cases of relocations, etc., but there have been cases where the noise levels have been measured if there is residential land nearby. There is a law that regulates noise levels, and the companies must adhere to it, making necessary accommodations. The EMPL said, though, that it is questionable how reasonable it is that the noise levels allowed for the industry are two times lower than for the highways next to its companies.
EL	There are some specific legislative regulations and conditions, regarding the establishment and operation of the enterprises of the sector, to comply with.

¹⁴⁵ Available at retsinformation.dk

¹⁴⁶ Available at retsinformation.dk

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	<p>The licensing process and the legislation concerning professional workshops, including in this sector, are determined by Ministerial Decision No. 64618/856/F15 (Government Gazette 2278/B/2018).</p> <p>According to the law, a series of procedures and supporting documents should be submitted to the authorities in order to launch the business. For example, the interested parties submit the completed questionnaire that exists in the annex to the law and a certificate of land uses from the town planning department to the development department of the region. The development department then responds, stating if an operating licence is required or if the government needs to be notified of the activity at www.notifybusiness.gov.gr. The majority of professional workshops belong to the category 'low harassment' and have relatively low requirements for their licensing. In this case, they make an announcement of installation and operation electronically, again through the website www.notifybusiness.gov.gr, and create a file with all the required supporting documents that must be kept at the company.</p>
ES	<p>Noise emissions are regulated by Law 37/2003 on noise. This law establishes the ceilings of emissions close to urban centres.</p> <p>No cases of relocation due to noise regulations have been reported.</p> <p>In addition to the law, trade unions, employers and national/regional governments have been working over the last 10 years in order to extend good practices to reduce noise produced by companies, in order to improve the health and safety of workers. Several guides have been edited, providing technical assistance and guidance to achieve this goal.</p>
FI	<p>No information is available.</p>
FR	<p>The national regulations are based on the better management of noisy activities, reduction of noise at the source and reduction of noise propagation. The regulations to be applied concern two aspects:</p> <ul style="list-style-type: none"> • the acoustic insulation of premises for professional use and activities (Article L.154-1 of the Construction and Housing Code) • noise emission limits <p>The emergence of noise perceived by others must not exceed 5 dB(A) during the day and 3 dB(A) at night, to which a corrective value is added according to the duration (Article R.1336-7 of the public health code). In the event of non-compliance, offenders are liable to a fine and to the confiscation of the object that caused the offence (Articles R.1336-14 to R.1336-16 of the Public Health Code).</p> <p>Some press articles mention a risk of closure of some sawmilling plants. For example, one of the last sawmills in the Provence-Alpes-Côte d'Azur region was threatened with closure because of noise pollution. It was sentenced in 2018 by the Court of Appeal of Aix-en-Provence to pay €44,000 in damages and must carry out compliance work within 6 months or face a penalty of €1,000 per day. In April 2018, in a question for the government, the deputy Philippe Gosselin mentioned that 'various court decisions have</p>

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	forced the closure of a sawmill or a shooting range following complaints about noise pollution’.
HR	There is no such regulation in Croatia.
HU	There are regulations in Act I/2012 on the Labour Code, but experts say that in practice the noise level is not really checked by the authorities, so health and safety rules are quite lenient. They often do not even measure the noise level. There have been no known cases of relocation due to noise level.
IE	Unknown.
IT	No specific information is available. During the interview with the employer organisation, this did not seem to be a significant issue.
LT	There are no research or studies available on the impact of national/local regulations related to noise prevention for companies in the sector. Recommendations and manuals on noise prevention are available at the State Labour Inspectorate. There is no publicly available information on cases where companies had to relocate their facilities due to noise regulations.
LU	There are no specific regulations in the sector.
LV	There are no specific regulations for the sector. All general regulations (Law on Pollution regarding noise) are binding on the sector. There is no information on companies that had to relocate their facilities due to noise regulations.
MT	<p>According to Malta’s trading licence regulations, all commercial activities as applicable, whether unlicensed or licensed by any authority and regulated by any legislation, must not cause annoyance by way of noise.</p> <p>There were no companies that needed to relocate due to noise regulations. To limit noise pollution to a specific area, the largest manufacturing companies irrespective of sector are all situated within industrial zones.</p> <p>Specific legislation had been passed stipulating that from 2016 onwards no licences were to be issued for even small-scale enterprises such as carpentry workshops within residential areas.</p>
NL	<p>There is no evidence of noise prevention being a big issue in the Netherlands for this sector.</p> <p>The use of wood instead of other materials actually might even be a solution to several hot topics, such as climate change, the nitrogen crisis, the housing challenge, forest protection, and circularity and sustainability in the sector.</p>
PL	<p>According to the respondents, only older and unmodernised woodworking plants generate significant noise. The current legal regulations limit the noise levels. At the same time, none of the respondents knew of a case where the plant had to be relocated for this reason.</p> <p>One court order is available in a private action case against a noise-generating sawmill. It was found that the personal rights (the right to physical and mental health and the right to undisturbed rest in one’s own home) of people living in the neighbouring property</p>

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	were violated. A relatively small amount of compensation was ordered (approximately €220) as well as the obligation to install silencers at the facility of the defendant company.
PT	Information was not obtained.
RO	The legislation does not provide special norms regarding the noise level for economic agents in the field of wood processing, but provides regulations for industrial objectives in general (Order No. 119/2014 for the approval of the norms of hygiene and public health regarding the living environment of the population; Law No. 121 of 3 July 2019 on the assessment and management of ambient noise).
SE	There are examples of noise being raised as an issue for sawmills. It has been the case that sawmills have had to cease operations during certain hours due to noise concerns, for instance.
SI	No, there is only general legislation related to noise prevention.
SK	National regulations are implemented in the sector, but no information is available about the relocation of companies.

Source: Network of Eurofound Correspondents, 2021

Annex 3: Largest companies in the sector

Table 57: Largest employers in the woodworking sector

Member State	Names of the largest employers in the sector	Estimated number of (sector-related) employees	Trade union(s) organising the employees in the company	Employer organisation(s) to which this employer is affiliated	Collective bargaining type applicable to this employer (SEB/MEB)
AT	DOKA	Several thousand	GBH, GPA	FVHI	MEB
AT	Stora Enso	4,000 ¹⁴⁷	GBH, GPA	FVHI	MEB
AT	Egger Holz	Several thousand	GBH, GPA	FVHI	MEB
BE	Unilin	2,104	ACLVB-CGSLB, (ABVV-FGTB) ACCG, (ACV-CSC) BIE	Fedustria	MEB, SEB
BE	Theuma	195	ACLVB-CGSLB, (ABVV-FGTB) ACCG, (ACV-CSC) BIE	Fedustria	MEB, SEB
BE	D'Hondt	193	ACLVB-CGSLB, (ABVV-FGTB) ACCG, (ACV-CSC) BIE	Unknown	MEB, SEB
BG	Velde Bulgaria	468	BFTOFWPI	n.d.	SEB
BG	Kastamonu Bulgaria	330	BFTOFWPI	BCWFI	SEB
BG	Fazerleks	208	BFTOFWPI	n.d.	SEB
CY	Nea Stereotis Ltd	45	Oikodomoi-PEO, OOIM-SEK	PASYVEX	MEB
CY	Cyprus Forest Industries Public Ltd	45	Oikodomoi-PEO, OOIM-SEK	n.d.	SEB
CY	La Qualite E.Z.A.C. Furniture Manufacturers Ltd	35	Oikodomoi-PEO, OOIM-SEK	PASYVEX	MEB
CZ	Kronospan	343	ZO Kronospan	ALDP	MEB, SEB
CZ	Mayr-Melnhof Holz Paskov s.r.o.	340	Mayr-Melnhof Holz trade union	New trade union (Nové odbory)	SEB

¹⁴⁷ Estimated number of employees across Europe.

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CZ	Stora Enso Wood Products Planá s.r.o.	250	Stora Enso trade union	ALDP	MEB, SEB
DE	EGGER	3,100	IG Metall	n.d.	n.d.
DE	Cordes Group	950	IG Metall	n.d.	n.d.
DE	Pfeifer Group	800	IG Metall	n.d.	n.d.
DK	JELD-WEN Danmark A/S	589	n.d. ¹⁴⁸	DI	n.d. ¹⁴⁹
DK	Idealcombi A/S	500	3F, HK, Danish Association of Professional Technicians, Danish Union of Electricians, Danish Metalworkers' Union	DI, Danish Construction Federation (Dansk Byggeri)	MEB, SEB
DK	Dansk Træemballage A/S	400	n.d.	DI	Collective bargaining agreement at sector level (<i>Træ- og Møbel Overenskomsten</i>) between DI and 3F
EE	JELD-WEN EESTI	717	n.d.	None	n.d.
EE	Stora Enso Eesti	709	n.d.	EMPL	n.d.
EE	Viljandi Aken ja Uks	707	n.d.	None	n.d.
EL	F.A. Mourikis S.A. (ΜΟΥΡΙΚΗΣ Α.Ε.)	150	Workers' union in Mourikis S.A.	n.d.	SEB
ES	Financiera Maderera S.A.	2,509	CCOO del Hábitat, UGT FICA	ANFTA	SEB
ES	Sonae Arauco	343	CCOO del Hábitat, UGT FICA, CGT	ANFTA	SEB
ES	Norma Doors	247	CGT, CCOO del Hábitat, UGT FICA	FEIM	MEB
FI	UPM Timber and UPM Plywood	n.d.	Paperworkers' Union, Industrial Union	Metsäteollisuus ry	At the moment, MEB; in the near future, SEB

¹⁴⁸ Unconfirmed, but at least 3F and probably HK for white-collar workers.

¹⁴⁹ Unconfirmed, but could be SEB for production staff and MEB for office workers.

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FI	Metsä Wood	n.d.	Paperworkers' Union, Industrial Union	Metsäteollisuus ry	At the moment, MEB; in the near future, SEB
FR	EGGER Panneaux et décors	873	FIBOPA CFE-CGC, BATI-MAT-TP CFTC, FO, FNCSBA-CGT	UIPP	MEB, SEB
FR	Piveteaubois	401	FNCB-CFDT, BATI-MAT-TP CFTC, FNCSBA-CGT	FNB	MEB, SEB
FR	SWISS KRONO SAS	359	FIBOPA CFE-CGC, BATI-MAT-TP CFTC, FO, FNCSBA-CGT, FNCB-CFDT	UIPP	MEB, SEB
HR	Hrvatske šume	8,200	HRSINDSUM	None	SEB
HR	Spačva d.d.Vinkovci	850	SSH	None	SEB
HR	Drvena Industrija Novoselec	200	SSH	None	SEB
HU	FALCO Forgácsolgyártó Rt.	325	FALCO Rt. Szakszervezete, a member of MEDOSZ	None	SEB
HU	Kronospan-MOFA Hungary Kft.	234	MOFA	None	SEB
HU	JELD-WEN Magyarország Kft.	162	JELD-WEN Magyarország Kft. Szakszervezete	None	SEB
IE	Coillte	500	Fórsa, SIPTU	n.d.	SEB
IE	CJ Sheeran	200	Unknown	n.d.	n.d.
IE	GP Wood	150	None	n.d.	None
IT	Gruppo Mario Saviola	1,500	Feneal – UIL, Filca – CISL, Fillea – CGIL	FLA	MEB, SEB
IT	Fantoni	620	Feneal – UIL, Filca – CISL, Fillea – CGIL	FLA	MEB, SEB
IT	Fрати Luigi	800	Feneal – UIL, Filca – CISL, Fillea – CGIL	FLA	MEB, SEB
LT	Bauwerk Group	885	None	LM	None

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LT	IKEA Industry	724	LBMAJDPS	None	SEB ¹⁵⁰
LT	Juodeliai	570	None	None	None
LU	Kronospan Luxembourg S.A.	133	Syndicat Bois, Caoutchouc, Céramique, Chimie, Ciment, Papier, Plastique, Textiles et Verre de l'OGB-L, LCGB-Indusid	FEDIL	SEB
LU	No-Nail Boxes	78	Syndicat Bois, Caoutchouc, Céramique, Chimie, Ciment, Papier, Plastique, Textiles et Verre de l'OGB-L, LCGB-Indusid	FEDIL	SEB
LU	Bois Brever S.A.	38	Syndicat Bois, Caoutchouc, Céramique, Chimie, Ciment, Papier, Plastique, Textiles et Verre de l'OGB-L, LCGB-Indusid	FEDIL	None
LV	Latvijas Finieris, AS	1,544	LMNA	LKF	SEB
LV	BYKO-LAT, SIA	550	None	LKF	None
LV	Gaujas koks	357	None	n.d.	None
MT	Construct Furniture Group	120	None	MEA	None
NL	Timber and Building Supplies Holland	1,800	FNV, CNV Vakmensen	VVNH	MEB
NL	Deli Home Nederland	867	FNV, CNV Vakmensen	Dutch-man	MEB
NL	Meilink Groep	694	FNV, CNV Vakmensen	EPV	MEB
PL	Kronospan	3,000	None	SPPD	None
PL	Dovista	2,400	SBiPD NSZZ 'Solidarność'	None	None

¹⁵⁰ Collective agreement has not been signed; negotiations are ongoing.

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PL	Steico Sp. z o.o.	1,400	SBiPD NSZZ 'Solidarność', ZZ 'Budowlani'	SPPD	SEB
PT	Amorim e Irmãos	1,316	SOCN	APCOR	MEB
PT	Sonae Indústria – Produção e Comercialização de Derivados de Madeira S.A.	701	Feviccom	AIMMP	MEB
PT	Vicaima – Indústria de Madeiras e Derivados	651	n.d.	AIMMP	MEB
RO	Schweighofer (HS Timber Productions SRL)	1,913	Company-based trade union the Schweighofer Group has several member companies, and the trade union was formed in one of them	ASFOR	SEB
RO	SC Kastamonu Romania SA	863	Company trade union	ASFOR	SEB
RO	SC EGGER Romania SRL Radauti	778	Company trade union	ASFOR	SEB
SE	Inwido AB	4,356	GS, Unionen, Ledarna, Sveriges Ingenjörer	TMF	MEB
SE	Moelven Industrier ASA	3,453	GS, Unionen, Ledarna, Sveriges Ingenjörer	Skogsindustrierna	MEB
SE	Nefab Holding AB	2,931	GS, Unionen, Ledarna, Sveriges Ingenjörer	TMF	MEB
SI	Inotherm d.o.o.	249	n.d.	ZDS	MEB
SI	Adria Dom d.o.o.	260	n.d.	GZS-ZLPI	MEB
SI	Inles d.d.	238	SLGS (Sinles), trade union of the company Inles	GZS-ZLPI	MEB, SEB
SK	DOKA DREVO, s.r.o. Banská Bystrica	402	None	None	None
SK	Kronospan, s.r.o. Zvolen	329	None	ZSD SR	None

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SK	Rettenmeier Tatra Timber, s.r.o. Liptovský Hrádok	249	OZ DLV	ZSD SR	MEB, SEB
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Note: *n.d., no data.*

Source: *Network of Eurofound Correspondents, 2021*

Annex 4: Paritarian organisations in the woodworking sector

There are 20 woodworking sector-related paritarian organisations in nine Member States: Belgium, Cyprus, Denmark, France, Hungary, Latvia, the Netherlands, Romania and Sweden.

Table 58: Woodworking sector-related paritarian organisations

Member State	Name of organisation/activity	Scope of organisation/activity	Trade union involved	Employer organisation involved
BE	Fonds voor Bestaanszekerheid voor de zagerijen en aanverwante nijverheden	It is a social fund.	(ACV-CSC) BIE, (ABVV-FGTB) ACCG, BBTK-SETCa, ACLVB-CGSLB	Belgische Houtconfederatie, NationaleUnieHoutsector
	Fonds voor Bestaanszekerheid van de houthandel	It is a social fund.	(ACV-CSC) BIE, (ABVV-FGTB) ACCG, BBTK-SETCa, ACLVB-CGSLB	Belgische Houtconfederatie, NationaleUnieHoutsector
	Fonds voor Bestaanszekerheid voor de stoffering en de houtbewerking	It is a social fund.	(ACV-CSC) BIE, (ABVV-FGTB) ACCG, BBTK-SETCa, ACLVB-CGSLB	Fedustria, Houtunie
CY	Provident Fund	The fund disburses lump sums to employees on retirement or change of work and is financed by proportional contributions by the employer and the employee.	Oikodomoi-PEO, OOIM-SEK	PASYVEX
	Welfare and Aid Fund	The fund provides financial aid to employees.	Oikodomi-PEO, OOIM-SEK	PASYVEX
DK	Træ- og Møbelindustriens Kompetencefond (TMKF)	The TMKF is a fund for vocational training. It is part of the large collective agreement covering the furniture and woodworking sectors. Member	3F	TMI (DI (Dansk Byggeri))

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		companies pay DKK 520 (€70) yearly for each employee covered by the particular collective agreement, and the funds are used for the vocational training of covered employees through an application process.		
	Træets uddannelses- og udviklingsfond (TUUF)	The TUUF is a fund for supporting activities promoting the competitiveness, image and recruitment potential of the industry. It is part of the large collective agreement covering the sectors furniture and woodworking. Member companies pay DKK 0.69 for each hour worked for each employee covered by the particular collective agreement. Of the paid hourly amount, DKK 0.20 will be spent on the remuneration, training and development of employee representatives.	3F	TMI (DI)
	Snedkerfagets Fællesudvalg (SFU)	The SFU is a joint committee on the joinery trade and the overall purposes of the joinery programme, especially for building joiners,	3F	DI

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		cabinet makers and organ builders.		
	Industriens Uddannelser	The task of the Educational Secretariat for Industry is to assess each trade committee's work to determine the vocational content, duration, structure and aim of the different vocational education and training programmes and continuing vocational training programmes in Danish industry. It is also the secretariat for vocational training funds.	Many trade unions are involved, but the founding ones are 3F and Dansk Metal. These are both members of CO-industri, which is also involved.	DI
	Træindustriens Uddannelsesudvalg (TU)	The TU is a vocational training committee of the woodworking and furniture industry.	3F	TMI (DI)
	Arbejdsmarkeds-pension	Arbejdsmarkeds-pension is a labour market pension scheme that is bound by a collective agreement. It applies to all wage earners covered by the collective bargaining agreement for woodworking and furniture. It is the employer organisation and employers who agree on the amount, and the collective bargaining agreement states that the minimum proportion of the	3F	DI

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		pension contribution is 8% from the employer and 4% from the employee.		
FR	OPCO 2i	The organisation provides funding for vocational training.	FNCB-CFDT, FNCSBA-CGT, FG-FO, CFE-CGC, BATI-MAT-TP CFTC	UIPC, UIPP, UICB, UFME, FNB, FTF, SEILA, SIEL GROW
HU	Sectoral Skills Council for the Woodworking Sector (Faipari Ágazati Készségtanács)	The council was set up by the Ministry of Finance in April 2020. It is involved in producing proposals for sector-related issues in vocational training. It is responsible for matching the education/training system to labour market needs. It has 21 members: the Ministry for Innovation and Technology, 1 trade union, 1 chamber of commerce and 18 business representatives, several of which are Fabunio members.	MEDOSZ	Fabunio
LV	Sectoral expert councils (wood industry (forestry, wood processing))	Sectoral expert councils are cooperative organisations of three parties: the state, employer organisations and trade unions. Their aim is to promote the efficiency and quality of vocational education in the sector, as well as the involvement of professional organisations and	LMNA	LKF

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		specialists in human resource development policy. The wood industry (forestry, wood processing) has its own council.		
NL	Sociaal Fonds voor de Houtverwerkende Industrie (SFH) ¹⁵¹	The SFH is engaged in monitoring compliance with and the application of collective bargaining agreements. In addition, it initiates and funds activities and projects in the field of employment terms, training and working conditions. These activities are aimed at both employers and employees, with the objective of maintaining good labour relations in the industry and further professionalisation.	FNV, CNV Vakmensen	Dutch Manufacturing Association, EPV, Nederlandse Vereniging van Klompenfabrikanten
	Stichting Sociaal en Werkgelegenheidsfonds Timmerindustrie (SSWT) ¹⁵²	The SSWT is responsible for implementing collective labour agreements in the field of training and employment and for the administrative processing of the declarations of industry-specific regulations. The SSWT also promotes, coordinates, supervises and arranges various retraining and extra	FNV, CNV Vakmensen	NBvT

¹⁵¹ More information is available at <https://www.houtverwerkendeindustrie.nl/>

¹⁵² More information is available at <https://www.sswt.nl/>

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		training projects for employees in the carpentry industry. Because the carpentry industry is looking for well-trained professionals, the SSWT participates in the development of new (digital) training courses.		
	Pensioenfonds Houtverwerkende industrie en jachtbouw ¹⁵³	It is a pension fund.	FNV, CNV Vakmensen	EPV, Nederlandse Vereniging van Klompenfabrikanten, Dutch-man, Vereniging HISWA ¹⁵⁴
	Stichting Fonds voor Onderzoek, Opleiding en Arbeidsverhoudingen in de Houthandel	The organisation funds activities related to working conditions, training and labour relations within the timber trade.	FNV, CNV Vakmensen	VVNH
RO	Programme for supplying professional training, authorised/recognised by the National Qualifications Authority – qualification courses and professional training sessions	The programme provides qualification courses and professional training sessions.	FSLIL	ASFOR
SE	Teknikcollage	Teknikcollage provides vocational education. It offers programmes at high school level and adult education.	GS, Sveriges Ingenjörer, Unionen, IF Metall	TMF, Gröna Arbetsgivare, Teknikföretagen, Livsmedelsföretagen, IKEM, Grafiska Företagen, Industriarbetsgivarna

¹⁵³ More information is available at <https://www.bpf-phi.nl/>

¹⁵⁴ More information is available at <https://www.hiswa.nl/en/about-hiswa>

Annex 5: Network of Eurofound Correspondents

Table 59: National correspondents who have contributed to this study

Country	Correspondent(s)	Organisation
AT	Bernadette Allinger	Working Life Research Centre (FORBA)
BE	Dries Van Herreweghe	HIVA – Research Institute for Work and Society, KU Leuven
BG	Ekaterina Ribarova	Institute of Social and Trade Union Research (ISTUR)
CZ	Soňa Veverková	Research Institute for Labour and Social Affairs
DE	Sandra Vogel	German Economic Institute
	Birgit Kraemer	Institute of Economic and Social Research, Hans Böckler Foundation
DK	Carsten Jorgensen	Employment Relations Research Centre (FAOS), University of Copenhagen
EE	Ingel Kadarik	Praxis Centre for Policy Studies
EL	Penny Georgiadou	Labour Institute of the General Confederation of Greek Workers (INE GSEE)
ES	Oscar Molina	Institute for Labour Studies, Universitat Autònoma de Barcelona
FI	Amanda Kinnunen	Oxford Research AB
FR	Frédéric Turlan	IR Share
HR	Predrag Bejakovic and Irena Klemencic	Institute of Public Finance (IPF)
HU	Nóra Krokovay	Kopint-Tárki Institute for Economic Research
IE	Colman Higgins	IRN Publishing
IT	Anna Mori	Department of Social and Political Sciences, University of Milan
LT	Inga Blaziene	Lithuanian Social Research Centre
LU	Franz Clément	Luxembourg Institute of Socio-Economic Research (LISER)
LV	Krišs Karnītis	EPC Ltd
NL	Amber van der Graaf	Panteia BV
PL	Barbara Surdykowska	Foundation Institute of Public Affairs
PT	Reinhard Naumann	Centre of Studies for Social Intervention (CESIS)
RO	Victoria Stoiciu and Nicoleta Voicu	European Institute of Romania
SE	Sirin Celik	Oxford Research AB
SI	Barbara Lužar	Faculty of Social Sciences, University of Ljubljana
SK	Miroslava Kordošová	Institute for Labour and Family Research
UK	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 woodworking 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 the European Confederation of Woodworking Industries – representing employers – as the most representative European-level sectoral employer organisation, and the European Federation of Building and Woodworkers – representing employees – as the representative European-level social partner organisation in the woodworking 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.

