European Foundation for the Improvement of Living and Working Conditions

Representativeness of the European social partner organisations: The food and drink sector

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Objectives of study

The aim of this representativeness study is to identify the relevant national and supranational social actors – that is, the trade unions and employer organisations – in the field of industrial relations in the food and drink sector, and to show how these actors relate to the sector's European interest associations of labour and business. The impetus for this study, and for similar studies in other sectors, arises from the European Commission's goal of identifying the representative social partner associations to be consulted under the provisions of the Treaty on the Functioning of the European Union (TFEU) (1.4MB PDF). Hence, this study seeks to provide the basic information needed to set up sectoral social dialogue. The effectiveness of the European social dialogue depends on whether its participants are sufficiently representative in terms of the sector's relevant national actors across the EU Member States. Only European associations that meet this precondition will be admitted to the European social dialogue.

To accomplish these aims, the study first identifies the relevant national social partner organisations in the food and drink sector, subsequently analysing the structure of the sector's relevant European organisations – in particular, their membership composition. This involves clarifying the unit of analysis at both the national and European level of interest representation. The study includes only organisations whose membership domain is 'sector-related' (Table 1).

Table 1: Determining the 'sector-relatedness' of an organisation

Scope	Question in the standardised questionnaire to all correspondents	Possible answers	Notes and explanations
Domain of the organisation within the sector	Does the union's/employer organisation's domain … cover the 'whole' food and drink sector in terms of economic activities, (that is, including all sub-activities)	Yes/No	This question refers to the economic sub-activities of the NACE code chosen. Some organisations may limit their domain to some of the sub-activities.
	… cover employees in all (legal) forms of enterprises (for instance: public ownership, private ownership, multinationals, domestic companies – of course, only insofar as they exist in the sector)?	Yes/No	Some organisations may limit, for instance, their domain to public sector companies/employees only.
	… cover employees in enterprises of all sizes in the food and drink sector?	Yes/No	Some organisations (notably employer organisations) may limit their domain to enterprises by size class (such as small and medium-sized enterprises – SMEs – only).
	… cover the food and drink sector in all the regions?	Yes/No	This question refers to geographical coverage. Some organisations may not be national in scope and may limit their domain to some of the regions.

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	...cover all occupations in the food and drink sector?	Yes/No	Some organisations (notably trade unions) delimit their domain to certain occupations only.
	...cover blue-collar and white-collar employees in the food and drink sector?	Yes/No	Some organisations (notably trade unions) delimit their domain to either blue-collar or white-collar employees
	.. cover employees with other than standard employment contracts in the food and drink sector? (self-employed, temporary agency workers, fixed-term contracts…)	Yes/No	Some organisations (notably trade unions) may not cover certain types of workers, like self-employed, freelancers, temporary agency workers and so on.
Domain of the organisation outside the sector	…also cover employees or enterprises outside the food and drink sector?	Yes/No	Some organisations may enlarge their domain to other activities not included in the food and drink sector.

Source: Standardised Excel-based questionnaire sent to EIRO national correspondents

At both national and European levels, many associations exist which are not considered social partner organisations as they do not deal with industrial relations. Thus, there is a need for criteria to define clearly the social partner organisations from other associations.

As regards the national-level associations, classification as a sector-related social partner organisation means that an associatoin must fulfil one of the following three criteria:

- be a party to 'sector-related' collective bargaining;
- be a member of a 'sector-related' European association of business or labour that is on the Commission's list of European social partner organisations consulted under Article 154 of the EU treaty;
- participate in the sector-related European social dialogue.

Taking affiliation to a European social partner organisation as a sufficient criterion for determining a national association as a social partner does not necessarily imply that the association is involved in industrial relations in its own country. Although this selection criterion may seem odd at first glance, a national association that is a member of a European social partner organisation will become involved in industrial relations matters through its membership of the European organisation.

Furthermore, it is important to assess whether the national affiliates to the European social partner organisations are engaged in industrial relations in their respective countries. Affiliation to a European social partner organisation and/or involvement in national collective bargaining are of utmost importance to the European social dialogue, since they are the two constituent mechanisms that can systematically connect the national and European levels.

A European association is considered a relevant sector-related interest association if it meets the following criteria:

- it is on the Commission's list of interest organisations to be consulted on behalf of the sector under Article 154 of the TFEU;
- it participates in the sector-related European social dialogue;
- it has asked to be consulted under Article 154 of the TFEU.

National associations are considered to be relevant sector-related interest associations if their domain relates to the sector and they are:

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- regularly involved in sector-related collective bargaining,
- affiliated to a 'sector-related' European association of business or labour on the Commission's list of European social partner organisations consulted under Article 154 of the TFEU;
- participating in sector-related European social dialogue.

Thus, the aim of identifying the sector-related national and European social partner organisations applies both a 'top-down' and 'bottom-up' approach.

Definitions

For the purpose of this study, the food and drink sector is defined in terms of the Statistical Classification of Economic Activities in the European Community (NACE), to ensure the cross-national comparability of the findings. More specifically, the food and drink sector is defined as embracing NACE (Rev. 2) 10 and 11: manufacture of food products and manufacture of beverages, respectively

The domains of the trade unions and employer organisations and the scope of the relevant collective agreements are likely to vary from this precise NACE definition. The study therefore includes all trade unions, employer organisations and multiemployer collective agreements that are 'sector-related' in terms of any of the following four patterns.

- Congruence: the domain/purview is identical to the NACE classification.
- Sectionalism: the domain/purview only covers a certain part of the sector as demarcated by NACE classification, while no group outside the sector is covered.
- Overlap: the domain/purview covers the entire sector plus (parts of) one or more other sectors.
- Sectional overlap: the domain/purview covers part of the sector plus (parts of) one or more other sectors.

Organisations are considered 'sector related' if their membership domain relates to the sector in one of the ways displayed in Figure 1.

Figure 1: Sector-relatedness of social partner organisations: Domain patterns

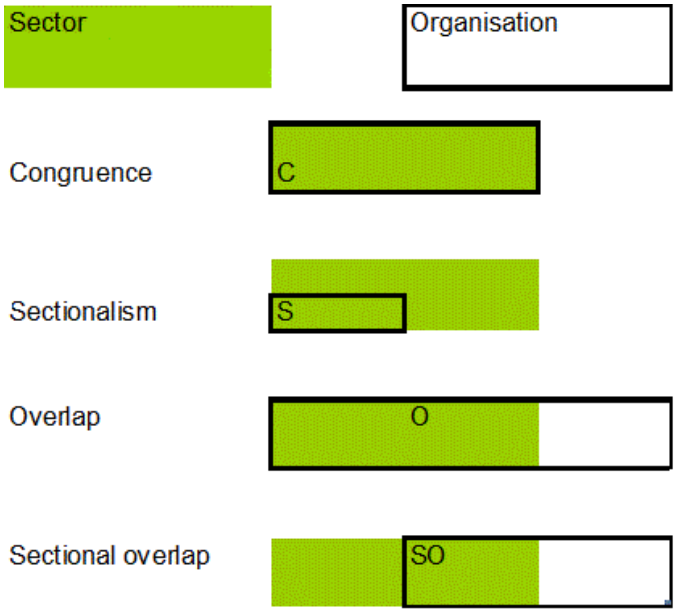

Figure 1: Sector-relatedness of social partner organisations: Domain patterns

According to this definition, the organisations listed by the European Commission as social partner organisations consulted under Article 154 of the TFEU are:

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- (on the employees' side) the European Federation of Food, Agriculture and Tourism trade unions (EFFAT);
- (on the employers' side): FOODDRINKEUROPE

In addition, the study will consider any other sector-related European associations with sector-related national associations –as defined below– under its umbrella.

Collective bargaining

To delineate the bargaining system, two further indicators are used: the first refers to the relevance of multiemployer bargaining compared with single-employer bargaining. The second indicator considers whether statutory extension schemes have been applied to the sector. For reasons of brevity, this analysis is confined to extension schemes that widen the scope of a collective agreement to employers not affiliated to the signatory employer organisation. Extension regulations targeting the employees are therefore not included in the research. Regulations concerning the employees are not significant to this analysis for two reasons.

- Extending a collective agreement to employees who are not unionised in a company covered by the collective agreement is a standard rule of the International Labour Organization, aside from any national legislation.
- If employers did not extend a collective agreement concluded by them, even when not formally obliged to do so, they would set an incentive for their workforce to unionise.

Collection of data

The collection of quantitative data is essential for investigating the representativeness of the social partner organisations, and is done through a bottom-up approach (by correspondents of Eurofound's European Industrial Relations Observatory – EIRO) and also a top-down one (a list of members of European social partners at national level).Unless cited otherwise, this study draws on country studies provided by EIRO, which is a network of national industrial relations experts. They complete a standard questionnaire by contacting the sector-related social partner organisations in their countries. The contact is generally first made via telephone interviews, but can also be established via email. In the case of unavailability of any representative, the national correspondents are asked to fill out the relevant questionnaires based on secondary sources, such as information given on the social partner's website, or derived from previous research studies.

It is often difficult to find precise quantitative data. In such cases, the EIRO national centres are requested to provide rough estimates rather than leaving a question blank, given the practical and political relevance of this study. However, if there is any doubt over the reliability of an estimate, this will be noted.

In principle, quantitative data may stem from three sources:

- official statistics and representative survey studies;
- administrative data, such as membership figures provided by the respective organisations, which are then used for calculating the density rate on the basis of available statistical figures on the potential membership of the organisation;
- personal estimates made by representatives of the respective organisations.

Quality control

In order to ensure the quality of the information gathered, several verification procedures and feedback loops have been used.

- First, the coordinators, in collaboration with Eurofound staff, check the consistency of the national contributions.
- Second, Eurofound sends the national contributions to the national members of its Governing Board, as well as to the European-level sector-related social partners' organisations. The peak-level organisations then ask their affiliates to verify the information. Feedback

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received from the sector-related organisations is then taken into account, if it is in line with the methodology of the study.

- Third, the complete study is finally evaluated by the European-level sectoral social partners and Eurofound's Advisory Committee on Industrial Relations, which consists of representatives from both sides of industry, governments and the European Commission.

Employment and economic trends

The food and drink sector consists of approximately 310,000 enterprises, which operate at local and regional level, but also in the world market. The greatest share of the products is offered by SMEs and global companies. SMEs generate approximately 48.5% of the total turnover and 63% of the total employment, while the large companies generate 51.5% of the turnover and 37% of the employment, although they account for only 0.9% of the companies. Moreover, according to the report by the High Level Group (HLG) on the Competitiveness of the European Agro-food industry (416Kb PDF) agricultural cooperatives also play a significant part, employing almost 700,000 workers.

According to Eurostat's 2010 Labour Force Survey (LFS) (121Kb PDF), the sector employed more than 4,739,900 people in the EU27 in 2010. Manufacture of food activities accounted for more than 90% of the sector, employing 4,299,200 people. Employment in the sector has been partially affected by the economic crisis. From 2008 to 2010, there was a loss of 210,300 jobs. Other data, on GDP for 2009, shows that employment in the sector represents 2% of total employment in the EU27, while sector activities represent 2% of the total GDP of the EU27. Thus, as highlighted by the HLG report, it is a sector with relatively low output.

Employment characteristics

Men account for more than 58% of the employment in both sub-sectors, according to LFS data for 2010. There are more women employed in food manufacture (43%) than in drinks manufacture (29%); and both figures are lower than the average female proportion for overall employment in the EU27 (45.5%). Most people employed in the sector are aged between 25 and 49 years; this age group accounts for 66% of the jobs in food manufacture and 69% in drinks manufacture. There are not many cases of self-employment or apprenticeships in this sector except in Germany, Greece and Italy, where the proportion of this is more than 20%.

Long term trends

The most significant pressure for change affecting the sector is globalisation. Increased international trade and cross-border mobility of capital investment have resulted in substantial changes in markets and trading patterns. At the same time, the liberalisation of trade, with emerging economies gaining prosperity, has provided new market opportunities as well as new sources of competition.

The 2009 HLG report states that the sector is being challenged by customer concerns about prices, food safety and health, as well as low levels of labour productivity, reflecting insufficient development of research and innovation.

Tables 2 and 3 give a general overview of the development of the sector from 2000 to 2010. They present figures on companies, employment and employees in the sector and in relation to the national economy.

The number of enterprises decreased in 12 out of 20 countries that had available data for 2000 to 2010. This decrease is linked to significant reductions in employment in countries such as Denmark and Estonia. However, in Belgium, Cyprus and Germany the drop in the number of companies implies an increase in employment. In Belgium and Germany this can be attributed to a trend towards market concentration, although data regarding German companies must be read with caution because they cover the period 2006–2009 rather than 2000–2010.

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In the Czech Republic, Latvia, Malta, Poland, Slovenia and Slovakia the number of companies increased while employment decreased. Apparently, in these countries, the sector is fragmented into enterprises with fewer employees.

Table 2: Employment in the EU food and drink sector, 2000–2010

	Year	Number of companies	Total employment	Female employment	Male employment	Sectoral employment as % of total employment
AT	2000	n.a.	n.a.	n.a.	n.a.	n.a.
AT	2009	3,956	77,607	n.a.	n.a.	1.80
BE	2000	6,178	96,393	32,922	63,471	3.00
BE	2010	5,053	98,123	35,139	62,984	3.00
BG	2008	n.a.	n.a.	n.a.	n.a.	n.a.
BG	2010	5,397	103,048	50,641	52,407	2.90
CY	2000	997	10,917	4,448	6,469	3.80
CY	2010	888	13,069	6,193	6,876	3.40
CZ	2000	13,799	127,300	63,400	63,900	2.69
CZ	2010	16,924	121,500	55,800	65,700	2.49
DE	2000	44,497	835,000	406,000	429,000	2.30
DE	2010	40,889	913,000	473,000	439,000	2.30
DK	2000	1,879	80,304	33,179	46,909	2.90
DK	2010	1,637	56,912	23,087	33,825	2.10
EE	2005	408	21,500	n.a.	n.a.	3.60
EE	2010	358	12,400	n.a.	n.a.	2.20
EL	2008	11,969	114,779	44,149	70,630	2.50
EL	2010	16,775	132,890	49,663	83,227	3.00
ES	2000	33,105	391,800	119,100	272,700	3.00
ES	2010	30,261	443,200	158,000	285,200	2.00
FI	2000	1,927	40,426	20,515	19,911	1.70
FI	2010	1,703	35,196	17,070	18,126	1.50
FR	2000	n.a.	n.a.	n.a.	n.a.	n.a.
FR	2009	60,009	n.a.	n.a.	n.a.	n.a.
HU	2000	6,881	148,100	58,600	89,500	3.8
HU	2010	6,489	122,200	50,500	71,700	3.30
IE	2008	n.a.	55,700	n.a.	n.a.	2.70
IE	2010	n.a.	43,200	n.a.	n.a.	2.30
IT	2001	66,936	446,785	162,623	284,162	1.90
IT	2009	57,764	427,789	155,709	272,080	1.80
LT	2006	1,139	n.a.	n.a.	n.a.	n.a.

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	Year	Number of companies	Total employment	Female employment	Male employment	Sectoral employment as % of total employment
LT	2012	843	n.a.	n.a.	n.a.	n.a.
LU	2000	n.a.	4,100	n.a.	n.a.	1.55
LU	2010	n.a.	5,100	n.a.	n.a.	1.42
LV	2000	557	35,858	15,814	20,044	4.53
LV	2010	738	25,571	14,996	10,875	3.19
MT	2000	533	3,547	545	3,002	2.57
MT	2010	543	3,284	554	2,730	2.24
NL	2000	10,125	n.a.	n.a.	n.a.	n.a.
NL	2010	4,340	n.a.	n.a.	n.a.	n.a.
PL	2000	1,748	457,400	n.a.	n.a.	4.90
PL	2010	6,273	420,800	n.a.	n.a.	4.30
PT	2000	5,243	92,053	n.a.	n.a.	3.40
PT	2010	5,818	90,820	n.a.	n.a.	3.30
RO	2000	10,073	n.a.	n.a.	n.a.	n.a.
RO	2010	8,591	191,525	n.a.	n.a.	2.30
SE	2000	1,746	n.a.	n.a.	n.a.	n.a.
SE	2011	1,927	n.a.	n.a.	n.a.	n.a.
SI	2000	388	20,880	8,973	11,907	2.60
SI	2010	592	14,851	6,584	8,267	1.80
SK	2000	1,285	66,100	28,500	37,600	3.15
SK	2010	1,449	55,300	30,000	25,300	2.39
UK	2000	n.a.	466,727	150,816	315,911	2.10
UK	2010	7,195	382,753	134,191	248,562	1.30

Note: n.a = not available

Table 3: Employees in the food and drink sector, 2000 and 2010

	Year	Total employees	Female employees	Male employees	Sectoral employees as % of total employees
AT	2000	72,454	n.a.	n.a.	2.00
AT	2009	74,356	n.a.	n.a.	2.00
BE	2000	85,615	29,505	56,110	3.00
BE	2010	88,743	32,130	56,613	3.00
BG	2008	100,581	51,884	48,697	4.07
BG	2010	94,985	47,497	47,488	4.20

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	Year	Total employees	Female employees	Male employees	Sectoral employees as % of total employees
CY	2000	n.a.	n.a.	n.a.	n.a.
CY	2010	12,933	6,135	6,798	3.60
CZ	2000	121,400	61,500	59,900	3.02
CZ	2010	114,400	53,700	60,700	2.85
DE	2000	717,749	354,709	363,040	2.60
DE	2010	647,095	315,217	331,878	2.30
DK	2000	78,476	32,712	45,764	3.10
DK	2010	55,953	22,836	33,117	2.30
EE	2005	20,900	n.a.	n.a.	3.70
EE	2010	12,200	n.a.	n.a.	2.30
EL	2008	86,825	33,305	53,520	2.90
EL	2010	93,929	36,939	56,990	3.30
ES	2000	360,100	115,800	244,300	3.00
ES	2010	397,600	145,250	252,350	3.00
FI	2000	39,226	19,974	19,253	2.00
FI	2010	34,101	16,581	17,520	1.60
FR	2000	533,000	n.a.	n.a.	n.a.
FR	2009	513,500	189,995	323,505	n.a.
HU	2000	n.a.	n.a.	n.a.	n.a.
HU	2010	n.a.	n.a.	n.a.	n.a.
IE	2008	n.a.	n.a.	n.a.	n.a.
IE	2010	n.a.	n.a.	n.a.	n.a.
IT	2001	331,836	123,732	208,104	1.90
IT	2009	334,221	124,621	209,600	1.90
LT	2006	51,583	n.a.	n.a.	6.00
LT	2012	40,999	n.a.	n.a.	5.10
LU	2000	4,100	n.a.	n.a.	1.68
LU	2010	5,000	n.a.	n.a.	1.48
LV	2000	35,792	15,786	20,006	4.55
LV	2010	25,799	14,954	10,845	3.20
MT	2000	3,192	508	2,684	2.61
MT	2010	2,991	517	2,474	2.33
NL	2000	140,000	45,400	94,600	2.00
NL	2010	122,400	42,200	80,200	1.50
PL	2000	491,700	n.a.	n.a.	3.20

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	Year	Total employees	Female employees	Male employees	Sectoral employees as % of total employees
PL	2010	448,300	n.a.	n.a.	3.20
PT	2000	79,965	37,124	42,841	3.40
PT	2010	86,601	43,035	43,566	3.30
RO	2000	209,599	n.a.	n.a.	4.80
RO	2010	184,876	n.a.	n.a.	4.00
SE	2000	61,924	n.a.	n.a.	1.71
SE	2011	52,152	n.a.	n.a.	1.26
SI	2000	20,557	8,894	11,663	2.90
SI	2010	14,443	6,480	7,963	1.90
SK	2000	64,000	27,900	36,100	3.31
SK	2010	53,000	29,200	23,800	2.72
UK	2000	453,050	145,604	307,446	1.90
UK	2010	376,374	131,564	244,810	1.50

Note: n.a = not available

The data in Tables 2 and 3 also show that female employment is higher than the European sectoral average in eight countries (Bulgaria, Cyprus, Czech Republic, Germany, Finland, Latvia, Slovenia and Slovakia – Table 2). Moreover, female employment is higher than male sectoral employment in Germany, Latvia and Slovakia (Table 2), and also Bulgaria, Latvia and Slovakia in the case of employees (Table 3).

The tables also show that 14 out of 20 countries record a decrease in overall employment from 2000 to 2010, with only Belgium, Cyprus, Germany, Spain, Greece and Luxembourg showing an increase. Data on the development of employment from 2000 to 2010 show a similar trend. In this case, 17 out of 24 countries show a decrease in the number of employees in the sector. Only Germany records an increase in employment and a decrease in employees. This could be explained by an increase in self-employment.

Data provided by national centres in Figure 2 show the change in the number of employees working in the sector from 2000 to 2010. According to available data, the proportion of employees in the sector has remained very stable in the majority of the countries. Some 11 countries out of 17 have recorded an increase in the proportion of employees, the others showing a slight decrease. The exception to this stable trend is Germany, where the proportion of employees decreased by around 15 percentage points between 2000 and 2010.

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Figure 2: Proportion of employees in food and drink sector, 2000–2010 (%)

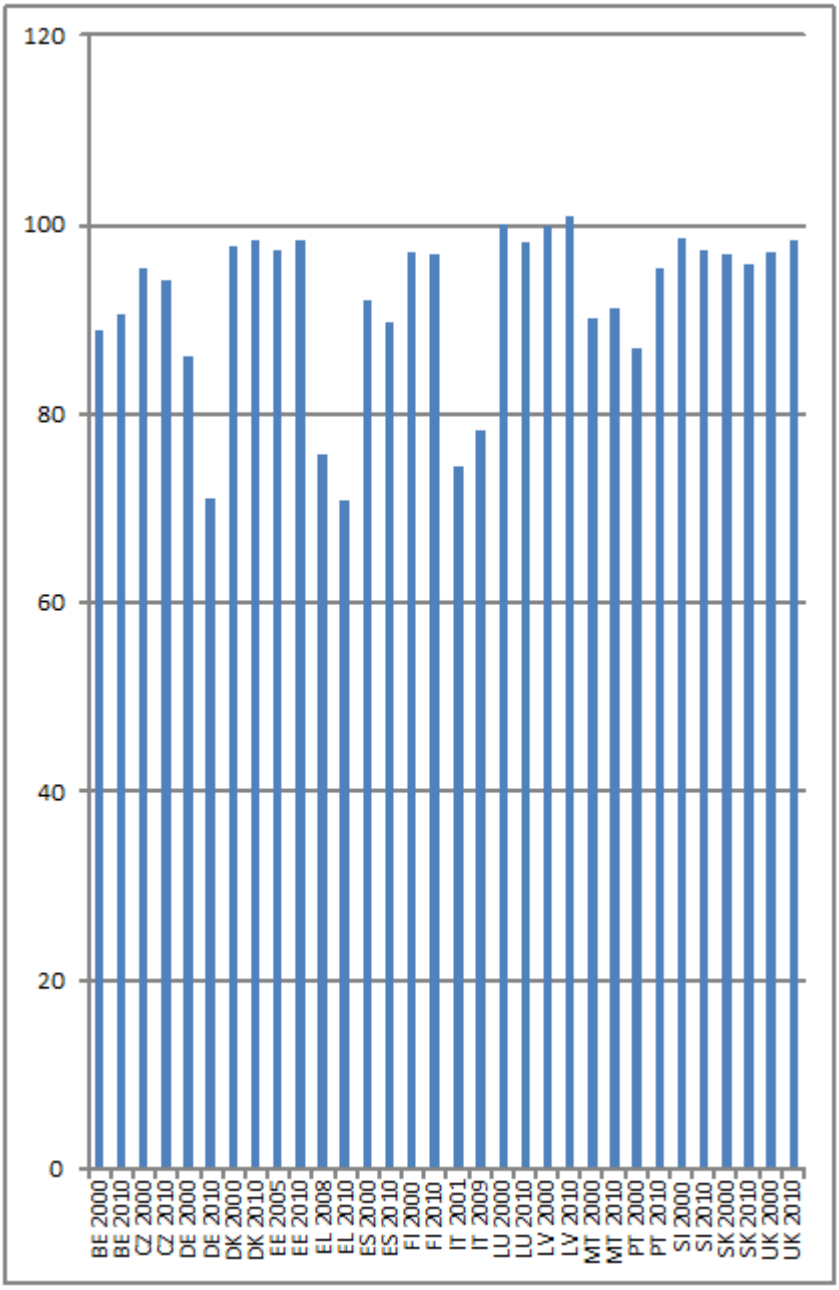

Figure 2: Proportion of employees in food and drink sector, 2000–2010 (%)

Source: Author's own interpretation of data from national centres and national statistics. For a detailed description of sources, please refer to national reports.

Recent developments

The financial crisis has had some impact on the food and drink industry, although not as significant as in other sectors. As seen in Figure 3, employment began to decrease in the third quarter of 2008 and followed a negative trend until 2010. Thus, on the basis of the data of the second quarter and the average of all the quarters, a loss of 179,000 jobs and of 213,925 jobs respectively can be observed. Employment then peaked again in the second quarter of 2009 followed by a drop in the third quarter. In contrast, in the second quarter of 2010, there is a continuous increase in employment of 168,800 until the fourth quarter. This could reflect a trend of a recovery in employment.

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Figure 3: Developments in employment, 2008–2010 (thousands)

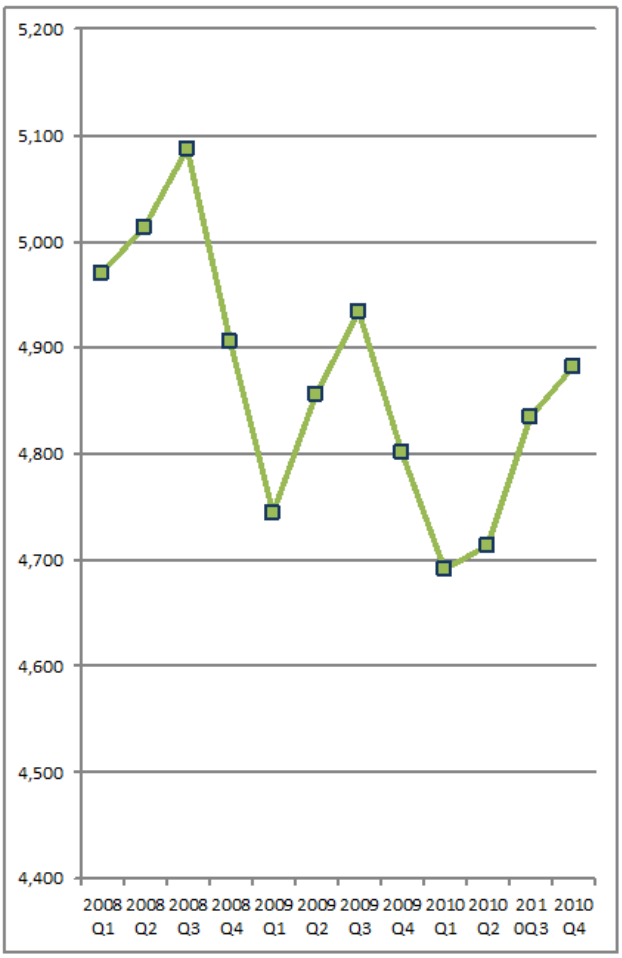

Figure 3: Developments in employment, 2008–2010 (thousands)

Source: Labour Force Survey (2010)

Generally, a negative employment trend caused by the financial crisis is observed in countries with available data. As seen in Figure 4, most of the countries show a drop in employment from 2008 to 2009 – notably, Denmark, Ireland, Slovenia and the UK. From 2009 to 2010 the negative trend persists, although more countries (9 out of 22 with available data) show a trend towards employment recovery, especially Austria and the UK. The latter increased the number of pay freezes applied in the sector in 2008–2009 as a response to the crisis, as described in the national report. It is worth noting that Greece is the only country that records an increase in employment during both periods.

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Figure 4: Differences in employment, 2009–2010 (%)

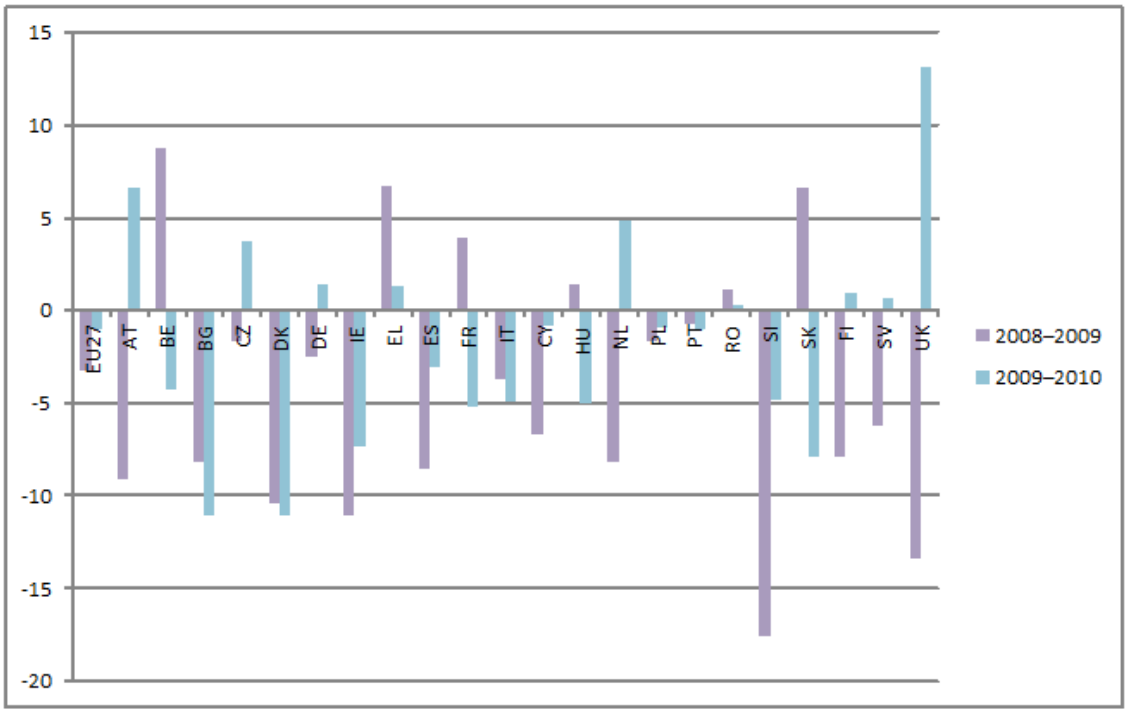

Figure 4: Differences in employment, 2009–2010 (%)

Source: Labour Force Survey, annual differences 2008–2009, 2009–2010

National level of interest representation

The analysis of the national level of interest representation will focus on three key elements:

- the organisations' membership domain and strength;
- their role in collective bargaining;
- their role in public policymaking.

Membership domain and strength

This study will focus on the following quantitative data on membership and relative strength within the food and drink sector, which were collected through the EIRO network of correspondents.

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Table 4: Definitions of membership

Type of organisation	Membership	Density
Trade union	Number of active members in employment Number of active members in employment in the food and drink sector	Sectoral density: number of active members in employment in the food and drink sector divided by total employment in the food and drink sector.
Employer organisation	Number of member companies Number of employees working in member companies Number of member companies in the food and drink sector Number of employees working in member companies in the food and drink sector	Sectoral density (companies): number of member companies in food and drink sector divided by the total number of companies in the food and drink sector. Sectoral density (employees): number of employees working in member companies in the food and drink sector divided by the total number of employees in the food and drink sector

Trade unions and employee interest representations

Tables 5, 6 and 7 present the employee organisation's data on their domains and membership strength. The tables list all sector-related organisations that are either involved in collective bargaining and/or affiliated to one of the European-level organisations. It should be noted that in Table 5, according to the main Hungarian national report, the domains of all mentioned unions might overlap. However, the main overlaps are between ÉDOSZ and ÉDSZ.

In Table 6, according to the national correspondents, the following points can be noted.

- CFTC AGRI is affiliated to EFFAT. However, it does not appear in the list of members of EFFAT. Accordingly, is has not been considered as an EFFAT member.
- TUB is affiliated to EFFAT. However, it does not appear in the list of members of EFFAT Accordingly, is has not been considered as an EFFAT member.
- De Unie is affiliated to EFFAT. However, it does not appear in the list of members of EFFAT. Accordingly, it has not been considered as an EFFAT member.

Table 5: Domain coverage and membership of employee organisations in the food and drink sector, 2011

	Trade union	Domain Coverage	Type of membership	Active members total	Active members in the sector
AT	GPA-djp	sectional overlap	voluntary	180,000	n.a.
AT	PRO-GE	sectional overlap	voluntary	220,000	20,000
BE	ABVV-FGTB HORVAL*	sectional overlap	voluntary	110,000	18,500
BE	ABVV-BBTK/FGTB-SETCA*	sectional overlap	voluntary	389,676	3,100

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	Trade union	Domain Coverage	Type of membership	Active members total	Active members in the sector
BE	ACV Voeding en diensten – CSC Alimentation et Services*	sectional overlap	voluntary	200,000	26,000
BE	LBC-NVK*	sectional overlap	voluntary	285,000	6,250
BE	CNE-CSC*	sectional overlap	voluntary	8,000	n.a.
BE	ACLVB – CGSLB*	overlap	voluntary	274,308	4,566
BG	FITU-Food*	sectional overlap	voluntary	2,556	2,431
BG	FKP-PODKREPA*	sectional overlap	voluntary	2,417	2,380
BG	TUB*	sectionalism	voluntary	506	490
CY	OVIEK*	sectional overlap	voluntary	9,156	2,225
CY	SEGDAMELIN*	sectional overlap	voluntary	9,000	400
CY	SEVETTYK*	sectional overlap	voluntary	13,840	800
CZ	NOS PPP	overlap	voluntary	9,467	8,195
DE	NGG	sectional overlap	voluntary	205,637	n.a.
DK	NNF	sectional overlap	voluntary	21,095	20,500
DK	HK/Handel	sectional overlap	voluntary	200,000	4,000
DK	CO-industri	sectional overlap	voluntary	239,871	9,180
DK	DMF	sectionalism	voluntary	700	700
DK	3F	sectional overlap	voluntary	n.a.	30,000
DK	HK/Privat	sectional overlap	voluntary	290,000	538
DK	Metal	sectional overlap	voluntary	86,462	1,800
DK	DEF	sectional overlap	voluntary	22,147	250
EE	ETMK	overlap	voluntary	n.a.	n.a.

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	Trade union	Domain Coverage	Type of membership	Active members total	Active members in the sector
EL	-	sectionalism	voluntary	9,000	9,000
EL	POEK	sectionalism	voluntary	1,500	1,500
EL	POMYM	sectionalism	voluntary	650	580
EL	POEEYTE	sectional overlap	voluntary	80,000	n.a.
EL	OEXBE	sectional overlap	voluntary	10,000	600
ES	FEAGRA-CCOO*	overlap	voluntary	14,000	n.a.
ES	FITAG-UGT*	overlap	voluntary	n.a.	n.a.
ES	ELA-STV*	sectional overlap	voluntary	24,909	n.a.
ES	CIG*	sectional overlap	voluntary	n.a.	n.a.
FI	SEL*	sectionalism	voluntary	21,000	21,000
FI	Pro	sectional overlap	voluntary	110,000	3,500
FI	YTN	sectional overlap	voluntary	150,000	3,000
FI	MVL*	sectionalism	voluntary	2,500	2,500
FR	CFE-CGC Agro*	sectional overlap	voluntary	8,000	4,000
FR	FGA-CFDT*	sectional overlap	voluntary	45,000	30,000
FR	FNAF-CGT*	sectional overlap	voluntary	n.a.	n.a.
FR	FGTA-FO*	sectional overlap	voluntary	30,000	n.a.
FR	CFTC AGR*I	overlap	voluntary	22,000	2,000
HU	ÉDOSZ*	sectional overlap	voluntary	n.a.	3,690
HU	HDSZ*	sectional overlap	voluntary	2,770	2,511
HU	MEDOSZ*	sectional overlap	voluntary	4,000	650
HU	ÉDSZ*	overlap	voluntary	3,800	3,300
HU	BDSZ*	sectionalism	voluntary	n.a.	n.a.
HU	GMDSZ*	sectionalism	voluntary	n.a.	n.a.

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	Trade union	Domain Coverage	Type of membership	Active members total	Active members in the sector
HU	HIDSZ*	sectionalism	voluntary	n.a.	n.a.
IE	SIPTU*	overlap	voluntary	199,881	n.a.
IE	UNITE*	overlap	voluntary	31,594	n.a.
IE	TEEU	sectional overlap	voluntary	39,000	500
IE	UCATT	sectional overlap	voluntary	8,750	100
IE	GSU	sectionalism	voluntary	1,309	1,309
IE	IDSA	sectionalism	voluntary	n.a.	n.a.
IT	FLAI-CGIL*	overlap	voluntary	281,912	n.a.
IT	FAI-CISL*	overlap	voluntary	197,921	n.a.
IT	UILA-UIL*	overlap	voluntary	224,747	45,000
IT	UGL-Agroalimentare*	overlap	voluntary	n.a.	n.a.
IT	UGL-Terziario*	sectional overlap	voluntary	212,380	n.a.
LT	LMP	overlap	voluntary	2,000	1,800
LU	FCA LCGB*	sectional overlap	voluntary	n.a.	n.a.
LU	Alimentation et Hôtellerie, OGBL*	sectional overlap	voluntary	n.a.	n.a.
LV	LIA*	overlap	voluntary	n.a.	n.a.
LV	LLPNAB*	overlap	voluntary	1,540	600
MT	UHM	overlap	voluntary	26,592	876
MT	GWU	overlap	voluntary	43,003	1,200
NL	FNV*	overlap	voluntary	475,000	n.a.
NL	CNV Vakmensen*	overlap	voluntary	135,000	10,000
NL	De Unie*	sectional overlap	voluntary	125,000	265
PL	KSPS NSZZ Solidarność*	overlap	voluntary	26,000	23,200
PL	ZZPPiS*	sectional overlap	voluntary	693	693
PL	FZZPM*	sectional overlap	voluntary	4,600	4,600
PL	ZZPPC*	sectional overlap	voluntary	2,000	2,000

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	Trade union	Domain Coverage	Type of membership	Active members total	Active members in the sector
PL	FZZPPS*	sectional overlap	voluntary	3,250	3,050
PL	FZZPPC*	sectional overlap	voluntary	n.a.	n.a.
PT	SINTAB*	overlap	voluntary	6,000	6,000
PT	STIANOR*	sectionalism	voluntary	2,500	2,500
PT	STIAC*	sectionalism	voluntary	2,500	2,500
PT	SINDILACTI*	overlap	voluntary	2,000	2,000
PT	SINTICABA	sectionalism	voluntary	1,500	1,500
PT	SETAA*	sectional overlap	voluntary	3,500	n.a.
PT	SITESE*	overlap	voluntary	10,000	n.a.
RO	Federation SINDALIMENTA*	overlap	voluntary	25,000	25,000
RO	Central CERES*	sectional overlap	voluntary	15,000	n.a.
SE	Ledarna*	sectional overlap	voluntary	88,000	1,198
SE	Unionen*	sectional overlap	voluntary	500,000	7,000
SE	Livs*	sectional overlap	voluntary	36,000	35,000
SE	Sveriges Ingenjörer*	sectional overlap	voluntary	133,000	n.a.
SI	KŽI	overlap	voluntary	n.a.	n.a.
SK	OZP SR	sectional overlap	voluntary	3,580	3,400
UK	BFAWU*	overlap	voluntary	22,786	20,000
UK	GMB*	overlap	voluntary	610,000	n.a.
UK	UNITE*	overlap	voluntary	1,500,000	80,000
UK	USDAW*	overlap	voluntary	414,000	n.a.

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Note: [a] = a more detailed description of the trade unions membership domain with regard to the sector can be found in Table 1

**= Domain overlap with other sector-related trade unions*

n.a. = not available

Table 6: Density, collective bargaining, consultation and affiliations of employee organisations in food and drink sector, 2011

	Trade union	Sectoral density (%)	Collective bargaining	Consultation		National, European and international affiliations
AT	GPA-djp	n.a.	Yes, both	n.a.	n.a.	ITUC-CSI-IGB, ETUC, EPSU, EMCEF, EFFAT, EFJ, UNI Europa ,ÖGB
AT	PRO-GE	25.8	Yes, both	Yes, both	On a regular basis and on an ad-hoc basis	ILO, ICEM, IMF, ITGLWF, IUF – UITA – IUL, TUAC, EFFAT, EMCEF, EMF ETUF:TCL, ETUC, ÖGB
BE	ABVV-FGTB HORVAL	18.9	Yes, both	Yes, within tripartite structures	On a regular basis	IUF, ITUC, EFFAT, ETUC, ABVV – FGTB
BE	ABVV-BBTK/FGTB-SETCA	3.2	Yes, both	Yes, within tripartite structures	On a regular basis	IUF, EFFAT, ABVV-FGTB
BE	ACV Voeding en diensten – CSC Alimentation et Services	26.5	Yes, both	Yes, within tripartite structures	On a regular basis	IUF, EFFAT, UNI-Europe ACV - CSC
BE	LBC-NVK	6.4	Yes, both	Yes, within tripartite structures	On a regular basis	IUF, EFFAT, ACV
BE	CNE-CSC	n.a.	Yes, both	Yes, within tripartite structures	On a regular basis	EFFAT
BE	ACLVB –	4.7	Yes, both	Yes, within	On a	IUF, EFFAT

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	Trade union	Sectoral density (%)	Collective bargaining	Consultation		National, European and international affiliations
	CGSLB			tripartite structures	regular basis	
BG	FITU-Food	2.6	Yes, both	Yes, within tripartite structures	On a regular basis and on an ad-hoc basis	IUF, EFFAT, ,CITUB
BG	FKP-PODKREPA	2.5	Yes, both	Yes, within tripartite structures	On a regular basis and on an ad-hoc basis	IUF, EFFAT, Confederation of Labour Podkrepa
BG	TUB	0.5	Yes, both	Yes, within tripartite structures	On a regular basis and on an ad-hoc basis	IUF, EFFAT, CITUB
CY	OVIEK	17.2	Yes, both	No		IMF, IUF, ITGLWF, IFG, ICEM , EFFAT, EMF, ECF, ETUF/TCL, EGF SEK
CY	SEGDAMELIN	3.1	Yes, both	No		None
CY	SEVETTYK	6.2	Yes, single-employer	No		PEO
CZ	NOS PPP	6.7	No	Yes, unilaterally	On an ad-hoc basis	ČMKOS, Českomoravská konfederace odborových svazů
DE	NGG	n.a.	Yes, both	Yes, within tripartite structures	On a regular basis	IUL, EFFAT, DGB
DK	NNF	36.6	Yes, both	Yes, unilaterally	On an ad-hoc basis	UNI, IUL, EFFAT, LO
DK	HK/Handel	7.1	Yes, both multi-employer and single bargaining	Yes, unilaterally	On an ad-hoc basis	UNI, IUL, EFFAT, LO
DK	CO-	16.4	Yes,	Yes,	On an ad-	UNI, IUL,

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	Trade union	Sectoral density (%)	Collective bargaining	Consultation		National, European and international affiliations
	industri		multi-employer bargaining only	unilaterally	hoc basis	IndustryALL, EFFAT, LO
DK	DMF	1.3	Yes, both	Yes, unilaterally	On an ad-hoc basis	EFFAT, LO, Serviceforbundet
DK	3F	53.6	Yes, both	Yes, unilaterally	On an ad-hoc basis	UNI, IUL, IFBWW EFFAT, EMCEF, UNI-Europa, EFBWW, EPSU LO
DK	HK/Privat	1.0	Yes, both	Yes, unilaterally	On an ad-hoc basis	UNI, UNI-Europa, LO
DK	Metal	3.2	Yes, both	Yes, unilaterally	On an ad-hoc basis	IMF, EMF, LO, CO-industri
DK	DEF	0.4	Yes, both	Yes, unilaterally	On an ad-hoc basis	ICEM, EMCEF, LO CO-industri
EE	ETMK	n.a.	No	No		Uniting Food, UIF, Kutsekoda
EL	Hellenic Federation of Milk, Food and Drinks Workers and Employees	9.6	Yes, multi-employer bargaining only	n.a.	n.a.	GSEE
EL	POEK	1.6	Yes, multi-employer bargaining only	No		GSEE
EL	POMYM	0.6	Yes, multi-employer bargaining only	No		GSEE
EL	POEEYTE	n.a.	Yes, multi-employer bargaining only	No		EFFAT, GSEE
EL	OEXBE	0.6	Yes, multi-employer	No		GSEE

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	Trade union	Sectoral density (%)	Collective bargaining	Consultation		National, European and international affiliations
			bargaining only			
ES	FEAGRA-CCOO	n.a.	Yes, both	Yes, unilaterally	On an ad-hoc basis	IUF, EFFAT
ES	FITAG-UGT	n.a.	Yes, both	Yes, unilaterally	On an ad-hoc basis	EFFAT
ES	ELA-STV	n.a.	Yes, both	n.a.	n.a.	EFFAT
ES	CIG	n.a.	Yes, both			
FI	SEL	59.7	Yes, multi-employer bargaining only	Yes, unilaterally	On a regular basis	IUF, EFFAT, SAK
FI	Pro	9.9	Yes, both	No		UNI, EFFAT, STTK
FI	YTN	8.5	Yes, both	No		
FI	MVL	7.1	Yes, both	No		AEDIL, STTK
FR	CFE-CGC Agro	0.8	Yes, both	Yes, unilaterally	On a regular basis	IUF, EFFAT, CFE-CGC
FR	FGA-CFDT	5.8	Yes, both	Yes, unilaterally	On a regular basis	IUF, UNI Global Union, EFFAT, UNI Europa
FR	FNAF-CGT	n.a.	Yes, both	Yes, unilaterally	On a regular basis	CGT
FR	FGTA-FO	n.a.	Yes, both	Yes, unilaterally	On a regular basis	IUF, EFFAT, FO
FR	CFTC AGRI	n.a.	Yes, both	Yes, unilaterally	On an ad-hoc basis	CFTC
HU	ÉDOSZ	3.0	Yes, single-employer	No		IUF, EFFAT, MSZOSZ
HU	HDSZ	2.1	Yes, single-employer	unknown	On an ad-hoc basis	IUF, EFFAT, MSZOSZ
HU	MEDOSZ	0.5	No	No		IUF, EFFAT, MSZOSZ
HU	ÉDSZ	2.7	Yes, single-employer	No		IUF, EFFAT, MSZOSZ

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	Trade union	Sectoral density (%)	Collective bargaining	Consultation		National, European and international affiliations
HU	BDSZ	n.a.	No	n.a.	n.a.	MSZOSZ
HU	GMDSZ	n.a.	No	n.a.	n.a.	MSZOSZ
HU	HIDSZ	n.a.	No	n.a.	n.a.	MSZOSZ
IE	SIPTU	n.a.	Yes, single-employer	n.a.	n.a.	EFFAT, ETUC, ICTU
IE	UNITE	n.a.	Yes, single-employer	n.a.	n.a.	ETUC, ICTU
IE	TEEU	1.2	Yes, single-employer	n.a.	n.a.	
IE	UCATT	0.2	Yes, single-employer	n.a.	n.a.	ETUC, ICTU
IE	GSU	n.a.	Yes, single-employer	Yes, within tripartite structures		ICTU
IE	IDSA	n.a.	Yes, single-employer	n.a.	n.a.	
IT	FLAI-CGIL	n.a.	Yes, both	Yes, both	On an ad-hoc basis	IUF-UITA, EFFAT, EFT, CGIL
IT	FAI-CISL	n.a.	Yes, both	Yes, within tripartite structures	On an ad-hoc basis	IUF-UITA, EFFAT; EFT, CISL
IT	UILA-UIL	10.5	Yes, both	Yes, both	On an ad-hoc basis	IUF-UITA, EFFAT UIL
IT	UGL-Agroalimentare	n.a.	Yes, both	Yes, within tripartite structures	On an ad-hoc basis	UGL
IT	UGL-Terziario	n.a.	Yes, both	n.a.	n.a.	UGL
LT	LMP	n.a.	Yes, single-employer	Yes, unilaterally	On an ad-hoc basis	IUF, EFFAT, LPSK
LU	FCA LCGB	n.a.	Information not provided	n.a.	n.a.	EFFAT, LCGB

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	Trade union	Sectoral density (%)	Collective bargaining	Consultation		National, European and international affiliations
LU	Alimentation et Hôtellerie, OGBL	n.a.	Information not provided	n.a.	n.a.	EFFAT, OGBL
LV	LIA	n.a.	No	No		ICEM, ITGLWF, IUF, EFFAT, LBAS
LV	LLPNAB	2.3	No. LLPNAB does not directly conclude collective agreements but it assists trade union organisations in companies that conclude single-employer collective agreements.	No		LBAS
MT	UHM	26.7	Yes, single-employer	Yes, unilaterally	On an ad-hoc basis	INFEDOP, CMTU
MT	GWU	40.1	Yes, single-employer	Yes, unilaterally	On an ad-hoc basis	PSI, ILO, ITUC, ITF, IUF, IFBWW, IMF, ICEM, ITGLWF, UNI, IFWEA. EPSU, ETUC, UNI Europa, EURO WEA, FERPA, Eurocadres, ETF, EFBWW, EMF, EFFAT.
NL	FNV	n.a.	Yes, both	Yes, both	On a regular basis and on an ad-hoc basis	EFFAT, IUF, FNV
NL	CNV	n.a.	Yes, both	Yes, both	On a	EFFAT, EFFAT,

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	Trade union	Sectoral density (%)	Collective bargaining	Consultation		National, European and international affiliations
	Vakmensen				regular basis and on an ad-hoc basis	CNV
NL	De Unie	0.2	Yes, both	Yes, both	On a regular basis and on an ad-hoc basis	MHP
PL	KSPS NSZZ Solidarność	5.5	Yes, single-employer	No		IUF, EFFAT, NSZZ
PL	ZZPPiS	0.2	Yes, single-employer	No		OPZZ
PL	FZZPM	1.1	n.a.	No		OPZZ
PL	ZZPPC	0.5	Yes, single-employer	No		OPZZ
PL	FZZPPS	0.7	Yes, single-employer	No		Trade Union International of Agriculture, Food, Commerce, Textile, OPZZ
PL	FZZPPC	n.a.	n.a.	n.a.	n.a.	OPZZ
PT	SINTAB	6.6	Yes, both	n.a.	n.a.	CGTP-IN FESAHT
PT	STIANOR	2.8	Yes, both	n.a.	n.a.	CGTP-INFESAHT
PT	STIAC	2.8	Yes, both	n.a.	n.a.	CGTP-IN, FESAHT
PT	SINDILACTI	2.2	Yes, both	n.a.	n.a.	
PT	SINTICABA	1.7	Yes, multi-employer bargaining only	n.a.	n.a.	
PT	SETAA	n.a.	Yes, both	n.a.	n.a.	IUF, EFFAT, UGT
PT	SITESE	n.a.	Yes, both	n.a.	n.a.	UNI UNI-Europa, UGT, FETESE
RO	Federation SINDALI	13.1	Yes, both	Yes, within tripartite	On an ad-hoc basis	IUF, EFFAT, CSDR

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	Trade union	Sectoral density (%)	Collective bargaining	Consultation		National, European and international affiliations
	MENTA			structures		
RO	Central CERES	n.a.	Yes, single-employer	Yes, within tripartite structures	On an ad-hoc basis	EFFAT, CNS
SE	Ledarna	n.a.	Yes, multi-employer bargaining only	Yes, unilaterally	On an ad-hoc basis	CEC, PTK, OFR
SE	Unionen	n.a.	Yes, multi-employer bargaining only	Yes, unilaterally	On an ad-hoc basis	UNI, EFFAT, TCO
SE	Livs	n.a.	Yes, both	Yes, unilaterally	On a regular basis	EFFAT, IUF, LO
SE	Sveriges Ingenjörer	n.a.	Yes, both	n.a.	n.a.	CEC, FEANI, ICEM, IMF, UNI, ANE, IN, TCO
SI	KŽI	n.a.	Yes, multi-employer bargaining only	Yes, within tripartite structures	On a regular basis	IUF, EFFAT, IUL, ZSSS
SK	OZP SR	6.4	Yes, both	Yes, within tripartite structures	On a regular basis	IUL, EFFAT, KOZ, SR
UK	BFAWU	5.2	Yes, single-employer	Yes, within tripartite structures	On an ad-hoc basis	IUF, EFFAT, TUC
UK	GMB	n.a.	Yes, single-employer		On an ad-hoc basis	IUF, UNI EFFAT, UNI europa, TUC
UK	UNITE	20.9	Yes, single-employer	Yes, within tripartite structures	On an ad-hoc basis	IUF, EFFAT, TUC
UK	USDAW	n.a.	Yes, both	n.a.	n.a.	IUF, EFFAT, TUC

Note: n.a.= not available

Table 7: Employee organisations, domain coverage and domain description in relation to the food and drink sector, 2011

	Employee organisation	Domain coverage	Domain description

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	Employee organisation	Domain coverage	Domain description
AT	GPA-djp	sectional overlap	White-collar employees
AT	PRO-GE	sectional overlap	Blue-collar workers
BE	ABVV-FGTB HORVAL	sectional overlap	White-collar workers
BE	ABVV-BBTK/FGTB-SETCA	sectional overlap	White-collar workers
BE	ACV Voeding en diensten – CSC Alimentation et Services	sectional overlap	Blue-collar workers
BE	LBC-NVK	sectional overlap	White-collar workers in the Dutch-speaking and bilingual region
BE	CNE-CSC	sectional overlap	White-collar workers in the French-speaking and bilingual region
BE	ACLVB – CGSLB	overlap	All employees in the entire food and drink sector
BG	FITU-Food	sectional overlap	Employees with fixed-term contracts
BG	FKP-PODKREPA	sectional overlap	Employees with fixed-term contracts
BG	TUB	sectionalism	Employees with standard employment contracts
CY	OVIEK	sectional overlap	Employees in the entire private food and drink sector (it excludes self-employed)
CY	SEGDAMELIN	sectional overlap	Employees of the manufacture of beverages sub-sector
CY	SEVETTYK	sectional overlap	Employees in the entire private food and drink sector (it excludes self-employed)
CZ	NOS PPP	overlap	Workers in the entire food and drink sector
DE	NGG	sectional overlap	Employees in the entire private food and drink sector (it excludes self-employed)
DK	NNF	sectional overlap	Blue-collar workers in the manufacture of food products sub-sector
DK	HK/Handel	sectional overlap	White-collar workers in the manufacture of food products sub-sector
DK	CO-industri	sectional overlap	All workers in the manufacture of food products sub-sector
DK	DMF	sectionalism	Dairies

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	Employee organisation	Domain coverage	Domain description
DK	3F	sectional overlap	Blue-collar workers
DK	HK/Privat	sectional overlap	White- collar workers
DK	Metal	sectional overlap	Blue-collar workers
DK	DEF	sectional overlap	Blue-collar workers
EE	ETMK	overlap	Workers in the entire food and drink sector and in the agriculture sector
ES	FEAGRA-CCOO	overlap	Workers in the entire food and drink sector and in the agriculture sector and in the manufacture of tobacco
EL	-	sectionalism	Specialised staff (blue-collar and other staff) employed in dairy, standardised products and drink enterprises
EL	POEK	sectionalism	Blue-collar workers, especially abbatoir workers
EL	POMYM	sectionalism	Employees of pasta industries and mills
EL	POEEYTE	sectional overlap	Workers employed under a dependent employment relationship
EL	OEXBE	sectional overlap	Blue-collar workers in baker's yeast, starch, starch-sugar and grape-sugar producing enterprises
ES	FITAG-UGT	overlap	All the workers in the entire food and drink sector
ES	ELA-STV	sectional overlap	All the workers in the entire food and drink sector in the Basque region
ES	CIG	sectional overlap	All the workers in the entire food and drink sector in the Galician region
FI	SEL	sectionalism	Blue-collar workers
FI	Pro	sectional overlap	White-collar employees
FI	YTN	sectional overlap	White-collar employees
FI	MVL	sectionalism	Dairies
FR	CFE-CGC Agro	sectionalism	Managers, technicians and engineers

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	Employee organisation	Domain coverage	Domain description
FR	FGA-CFDT	sectional overlap	Employees in the entire private food and drink sector (it excludes self-employed)
FR	FNAF-CGT	sectional overlap	Employees in the entire private food and drink sector (it excludes self-employed)
FR	FGTA-FO	sectional overlap	Employees in the entire private food and drink sector (it excludes self-employed)
FR	CFTC AGRI	overlap	Workers in the entire food and drink sector
HU	ÉDOSZ	sectional overlap	Workers in the manufacture of food products sub-sector
HU	HDSZ	sectional overlap	Workers in the manufacture of food products sub-sector
HU	MEDOSZ	sectional overlap	Workers in the manufacture of food products since March 2012. The main domain of the union is agriculture, water, forest workers.
HU	ÉDSZ	overlap	Workers in the entire food and drink sector
HU	BDSZ	sectionalism	Workers in the manufacture of food products sub-sector
HU	GMDSZ	sectionalism	Workers in the manufacture of food products sub-sector
HU	HIDSZ	sectionalism	Workers in the manufacture of food products sub-sector
IE	SIPTU	overlap	Workers in the entire food and drink sector
IE	UNITE	overlap	Workers in the entire food and drink sector
IE	TEEU	sectional overlap	Technical/engineering/electrical craft workers
IE	UCATT	sectional overlap	Craft workers
IE	GSU	sectionalism	Guinness staff
IE	IDSA	sectionalism	Irish distillers
IT	FLAI-CGIL	overlap	Workers in the entire food and drink sector
IT	FAI-CISL	overlap	Workers in the entire food and drink sector
IT	UILA-UIL	overlap	Workers in the entire food and drink sector
IT	UGL-Agroalimentare	overlap	Workers in the entire food and drink sector

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	Employee organisation	Domain coverage	Domain description
IT	UGL-Terziario	sectional overlap	Employees that work in baking and flour products
LT	LMP	overlap	Workers in the entire food and drink sector
LU	FCA LCGB	sectional overlap	n.a.
LU	Alimentation et Hôtellerie, OGBL	sectional overlap	n.a.
LV	LIA	overlap	Workers in the entire food and drink sector
LV	LLPNAB	overlap	Workers in the entire food and drink sector
MT	UHM	overlap	Workers in the entire food and drink sector
MT	GWU	overlap	Workers in the entire food and drink sector
NL	FNV	overlap	Workers in the entire food and drink sector
NL	CNV Vakmensen	overlap	Workers in the entire food and drink sector
NL	De Unie	sectional overlap	Middle and higher personnel
PL	KSPS NSZZ Solidarność	overlap	Workers in the entire food and drink sector
PL	ZZPPiS	sectional overlap	Workers in the manufacture of food products sub-sector
PL	FZZPM	sectional overlap	Workers in the manufacture of food products sub-sector.
PL	ZZPPC	sectional overlap	Workers in the manufacture of food products sub-sector
PL	FZZPPS	sectional overlap	Employees with standard employment contracts
PL	FZZPPC	sectional overlap	Workers in the manufacture of food products sub-sector
PT	SINTAB	overlap	Workers in the entire food and drink sector
PT	STIANOR	sectionalism	Northern Portugal
PT	STIAC	sectionalism	Central and southern Portugal and the islands (Madeira and Azores)
PT	SINDILACTI	n.a.	
PT	SINTICABA	sectionalism	Workers in the manufacture of beverages sub-sector
PT	SETAA	sectional overlap	n.a.

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	Employee organisation	Domain coverage	Domain description
PT	SITESE	overlap	Workers in the entire food and drink sector
RO	Federation SINDALIMENTA	overlap	Workers in the entire food and drink sector
RO	Central CERES	sectional overlap	Workers in the manufacture of food products sub-sector.
SE	Ledarna	sectional overlap	White-collar workers
SE	Unionen	sectional overlap	White-collar workers
SE	Livs	sectional overlap	Blue-collar workers
SE	Sveriges Ingenjörer	sectional overlap	White-collar workers
SI	KŽI	overlap	Workers in the entire food and drink sector
SK	OZP SR	sectional overlap	Self-employed, temporary agency workers, freelancers are not covered.
UK	BFAWU	overlap	Workers in the entire food and drink sector
UK	GMB	overlap	Workers in the entire food and drink sector
UK	UNITE	overlap	Workers in the entire food and drink sector
UK	USDAW	overlap	Workers in the entire food and drink sector

All the 27 countries record at least one sector-related trade union. In total, 96 sector-related trade unions were identified that fulfil the criteria to be included in the representativeness study. Only one sector-related union is recorded in 22.2% of the cases, two in 18.5% and three unions are observed in 11.1% of the countries. Moreover, 48.1% of the countries record four or more sector-related unions, thus showing a fragmented landscape.

The undefined boundaries of the food and drink sector imply that no unions have demarcated their domain in a way that is congruent with the sector definition. This fact highlights that statistical definitions of business activities of the sector differ from the lines along which employees identify their interests, mainly based on trades and occupational categories.

Sectional overlaps prevail in the food and drink sector (in up to 55% of the cases). This is usually because of domain demarcations focusing on certain categories of employees, which are then organised across several or all sectors. Employee categories are specified by various parameters.

These parameters can be distinct occupations:

- managers, technicians and engineers (CFE-CGC Agro in France);
- technical, engineering and electrical craft workers (TEEU in Ireland);
- craft workers (UCATT in Ireland);
- managers (Ledarna in Sweden).

The paramaters may also be employment status:

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- white-collar workers (GPA-djp in Austria, ABVV-BBTK/FGTB-SETCA and LBC-NVK in Belgium, HK/Privat in Denmark, Pro, YTN in Finland, De Unie in the Netherland, Unionen, Sveriges Ingenjörer in Sweden);
- blue-collar workers (PRO-GE in Austria, ABVV-FGTB HORVAL and ACV Voeding en diensten – CSC Alimentation et Services in Belgium, NNF, 3F, Metal, DEF in Denmark, OEXBE in Greece, Livs in Sweden);
- employees (OVIEK, SEGDAMELIN, SEVETTYK in Cyprus, 3F in Denmark, FGA-CFDT, FNAF-CGT, FGTA-FO in France, POEEYTE in Greece);
- self-employed (SUKI-GLOSA in Slovenia);
- fixed-term contract workers (FITU-Food, NFFI Podkrepa in Bulgaria);
- workers under standard employment forms (FZZPPS in Poland, OZP SR in Slovakia);
- workers in private companies (NGG in Germany).

The parameters could also include geographic region, such as CIG, ELA-STV in Spain and CNE in Belgium, which are active only in certain regions.

Domain demarcations resulting in overlap in relation to the sector occur in 29% of the cases. Overlap, by and large, arises from two different modes of demarcation. The first one refers to general (for example cross-sectoral) domains (SIPTU in Ireland, UHM, GWU in Malta, FNV, CNV Vakmensen in the Netherlands, GMB, UNITE in the UK). The second and more frequent mode in the sector relates to various forms of multisector domains, covering continuous sectors, such as agriculture and fisheries, manufacture of tobacco, trading of food and drink or different sectors which do not directly relate to food and drink, such as mining, chemicals or hotels and restaurants (ETMK in Estonia, FEAGRA-CCOO, FITAG-UGT in Spain, CFTC AGRI in France, ÉDSZ in Hungary, FLAI-CGIL, FAI-CISL, UILA-UIL, UGL-Agroalimentare in Italy, LIA, LLPNAB in Latvia, KSPS NSZZ Solidarność in Poland, SINTAB, SITESE in Portugal, Federation SINDALIMENTA in Romania, KŽI in Slovenia, BFAWU in the UK).

Finally, sectionalism can be found in 16% of the cases. It arises from the existence of:

- occupational or employment status sector-specific trade unions, such as white-collar workers (DJ in Germany and SNCAMTC and SNACOPVA in France);
- employees with standard employment contracts (TUB in Bulgaria, Hellenic Federation of Milk, Food and Drinks Workers and Employees in Greece);
- trade unions covering only some geographical regions (STIANOR, STIAC in Portugal);
- trade unions covering only some activities within the food and drink sector, whether manufacture of food or manufacture of beverage, or some narrower sectors (POMYM in Greece, BDSZ, GMDSZ, HIDSZ in Hungary, GSU, IDSA in Ireland, SINTICABA in Portugal, DMF in Denmark).

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Figure 5: Food and drink sector-related trade unions and their domain patterns

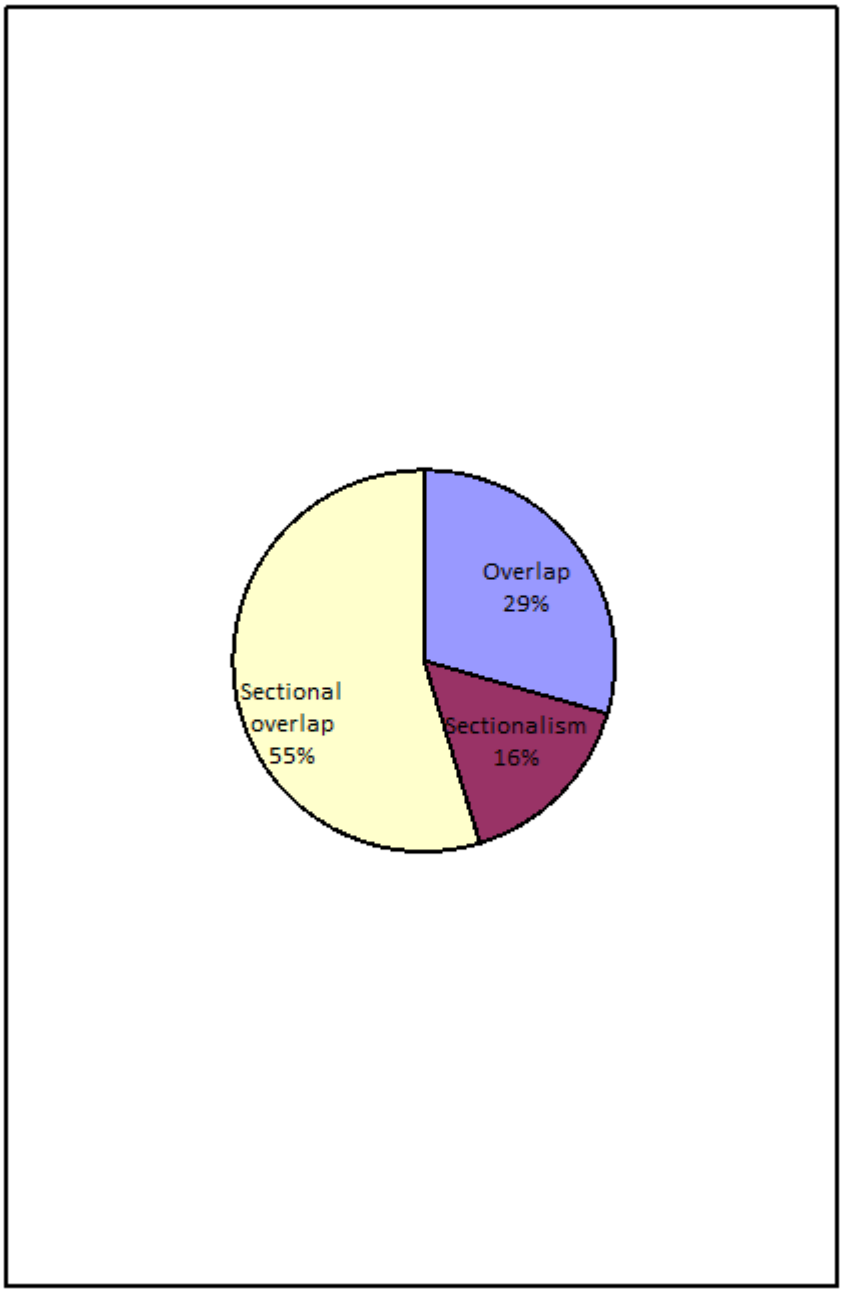

Figure 5: Food and drink sector-related trade unions and their domain patterns

Note: n = 94

Source: EIRO national contributions

In the food and drink sector, the unions' domain refers to different occupations and employment statuses, and the presence of sector-specific trade unions is also high. Figure 5 shows the overlap of these inter-union domains. Some 17 out of 21 countries record only one sector-related trade union. In most countries (except Greece, Denmark, Malta and Austria) with more than one sector-related trade union, the domain of any of them overlaps with the domain of all or most of the others. Noticeable inter-union competition is recorded in only France and Sweden. In France, unions compete for members and their subsequent support in the workplace elections that determine which trade union has a seat on the works council. According to the French national correspondent, competition is expected to increase in 2013, when a new representativeness regulation based on the workplace elections outcomes will come into force. In Sweden, competition concerns members' recruitment.

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Membership of the sector-related trade union is, in principle, voluntary in the 27 countries under consideration.

The numbers of active trade union members differ widely, ranging from more than 1.5 million (in the case of UK's UNITE) to only a few dozen (such as POMYN in Greece). This considerable variation reflects differences in the size of the economy and the comprehensiveness of the membership domain, rather than the ability to recruit members. Therefore, density is the measure of membership strength, which is more appropriate to comparative analysis. In this context it should be noted that density figures in this section refer to net ratios, which means that they are calculated on the basis of active employees only, rather than taking all union members into account (both those in a job and those who are not). This is mainly because research usually considers net union densities as more informative than gross densities, since the former measure tends to reflect unionisation trends among the active workforce more quickly and accurately than the latter (only the active workforce is capable of taking industrial action). When looking at sector density (again referring only to active members), it is important to differentiate between trade unions' sectoral density and their domain density. The domain or overall density must be higher than the sectoral density if a trade union organises only a particular part of the sector – that is, where the trade union's membership domain is sectionalist. It must be equal if a trade union only organises the whole sector as it is defined in the study – that is, where the trade union's membership domain is congruence.

Sectoral density rates are available for more than half of the sector-related organisations covered (56 out of 96 cases). Statistics indicate the following:

- sectoral density exceeds 20% in 14% of the cases of those trade unions (eight in total) that document figures on density;
- 9% of unions (five) claim to gather between 10% and 20% of the sector's employees;
- 23% of the trade unions (13), for which data are available, claim to organise between 5% and 10% of the active employees of the sector;
- 54% of the trade unions (30) record a sector density rate of fewer than 5% of the employees in the sector.

In this sense, in addition to the fact that the unions' domains mainly overlap in the sector and represent different occupations through other sectors, sectoral domain varies depending on the countries and different unions' domains.

These low sector-density rates are caused by the fragmentation of the trade union domains shown above and the existence of several trade unions in the sector in many countries. In addition, it is noteworthy that data is not available in the majority of cases.

Employers' organisations

Tables 8 and 9 present membership data for the employers' organisations in the food and drink sector. In this case, 24 of the EU27 members are identified. With regard to Cyprus, Lithuania and Malta, neither the top-down nor the bottom-up approach identified any relevant organisation.

Table 8: Domain coverage and membership of employer/business organisations in food and drink, 2011

	Employer organisation	Domain coverage	Type of membership	Companies total	Companies in sector	Employees total	Employees in sector
AT	FVNG	sectionalism	compulsory	230	230	27,000	27,000
AT	BILG	sectionalism	compulsory	4,428	4,428	44,013	44,013
BE	FEVIA	congruence	voluntary	512	512	53,387	53,387
BG	USSPMB	sectional	voluntary	12	10	2,000	1,800

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	Employer organisation	Domain coverage	Type of membership	Companies total	Companies in sector	Employees total	Employees in sector
		overlap					
BG	OOPAB	sectionalism	voluntary	16	16	1,200	1,200
BG	UMCF	sectional overlap	voluntary	60	55	4,162	4,100
BG	UPBB	sectional overlap	voluntary	79	60	n.a.	n.a.
BG	UBM	sectional overlap	voluntary	38	30	n.a.	n.a.
BG	UBB	sectional overlap	voluntary	27	7	n.a.	1,444
CY	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.
CZ	PK ČR	overlap	voluntary	91	n.a.	92,700	n.a.
DE	BLL	overlap	voluntary	300	n.a.	n.a.	n.a.
DE	BVE	overlap	voluntary	50	n.a.	n.a.	n.a.
DE	ANG	overlap	voluntary	n.a.	n.a.	n.a.	n.a.
DE	BDSI	sectionalism	voluntary	220	220	n.a.	n.a.
DE	VdZ	sectionalism	voluntary	4	4	5,500	5,500
DE	na	sectional overlap	voluntary	100	90	40,000	34,000
DE	na	sectionalism	voluntary	14,200	14,200	292,400	292,40
DE	DFV	sectionalism	voluntary	na	na	na	n.a.
DK	DI	overlap	voluntary	10,000	270	1,000,000	44,000
DK	MA	sectionalism	voluntary	19	19	8,500	8,500
DK	BKD	sectionalism	voluntary	625	625	15,000	15,000
DK	DSM	sectionalism	voluntary	400	400	5,000	5,000
EE	ETL	congruence	voluntary	49	49	11,730	11,730
EL	GSEVEE	overlap	voluntary	160,000	10,000	500,000	25,000
EL	SEV	sectional overlap	voluntary	n.a.	n.a.	n.a.	n.a.
EL	SEVT	sectionalism	voluntary	n.a.	n.a.	n.a.	n.a.
ES	FIAB	congruence	voluntary	8,000	8,000	n.a.	n.a.
ES	AMACO	sectionalism	voluntary	100	100	12,320	12,320
ES	CONFECARNE	sectionalism	voluntary	n.a.	n.a.	n.a.	n.a.
ES	FNACV	sectionalism	voluntary	n.a.	n.a.	n.a.	n.a.
ES	AFHSE	sectionalism	voluntary	126	126	n.a.	n.a.

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	Employer organisation	Domain coverage	Type of membership	Companies total	Companies in sector	Employees total	Employees in sector
ES	AEFH	sectionalism	voluntary	7	7	n.a.	n.a.
ES	ANIE	sectionalism	voluntary	n.a.	n.a.	n.a.	n.a.
ES	CESFACB	sectionalism	voluntary	15	15	n.a.	n.a.
ES	FENIL	sectionalism	voluntary	80	80	n.a.	n.a.
ES	TUMA	sectionalism	voluntary	n.a.	n.a.	n.a.	n.a.
ES	FEICOPESCA	sectionalism	voluntary	n.a.	n.a.	n.a.	n.a.
ES	ASEPRHU	sectionalism	n.a.	n.a.	n.a.	n.a.	n.a.
ES	ANEABE	sectionalism	voluntary	n.a.	n.a.	n.a.	n.a.
ES	UNIADE	sectionalism	voluntary	11	11	n.a.	n.a.
ES	AEFPA	sectionalism	voluntary	na	na	na	n.a.
FI	ETL	sectionalism	voluntary	280	280	26,000	26,000
FR	ANIA	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.
FR	ADEPALE	sectionalism	voluntary	225	225	n.a.	38,000
FR	USIPA	sectionalism	voluntary	10	10	n.a.	n.a.
FR	FEDAROM	sectionalism	voluntary	46	46	1,800	1,800
FR	SNBR	sectionalism	voluntary	10	10	4,600	4,600
FR	FEBPF	sectionalism	voluntary	160	160	n.a.	n.a.
FR	ABF	sectional overlap	voluntary	96	96	n.a.	n.a.
FR	FICT	sectionalism	voluntary	250	250	34,000	34,000
FR	FNICG	sectional overlap	voluntary	n.a.	n.a.	n.a.	n.a.
FR	CSEM	sectionalism	voluntary	18	18	n.a.	n.a.
FR	FEDALIM	sectionalism	voluntary	n.a.	n.a.	n.a.	n.a.
FR	SFIG	sectionalism	voluntary	11	11	n.a.	n.a.
FR	UNIJUS	sectional overlap	voluntary	31	n.a.	n.a.	n.a.
FR	FNIL	congruence	voluntary	120	120	50,000	50,000
FR	FNCL	sectionalism	voluntary	340	340	n.a.	n.a.
FR	Alliance 7	sectionalism	voluntary	413	413	47,100	47,100
FR	CSFL	sectionalism	voluntary	5	5	n.a.	n.a.
FR	ANMF	sectionalism	voluntary	299	299	5,965	5,965
FR	CSF	sectionalism	voluntary	6	6	n.a.	n.a.

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	Employer organisation	Domain coverage	Type of membership	Companies total	Companies in sector	Employees total	Employees in sector
FR	FFS	sectionalism	voluntary	200	200	n.a.	n.a.
FR	SNSF	sectionalism	voluntary	7	n.a.	n.a.	n.a.
FR	-	sectionalism	n.a.	n.a.	n.a.	n.a.	n.a.
FR	-	sectionalism	voluntary	42	42	n.a.	n.a.
FR	SYFAB	sectionalism	n.a.	20	20	n.a.	n.a.
FR	SNIV-SNCP	sectionalism	voluntary	80	80	35,000	35,000
FR	FICGV	sectionalism	voluntary	300	300	n.a.	n.a.
FR	FIA	sectionalism	voluntary	n.a.	n.a.	n.a.	n.a.
HU	ÉFOSZ	sectional overlap	voluntary	875	850	85,000	83,000
HU	MPSZ	sectional overlap	voluntary	375	n.a.	12,000	83,000
IE	IBEC	overlap	voluntary	7,500	150	n.a.	n.a.
IT	Federalimentare	congruence	voluntary	6,500	6,500	410,000	410,000
IT	AGCI-Agrital	sectional overlap	voluntary	1,077	536	9,497	7,489
IT	Legacoop Agroalimentare	sectional overlap	voluntary	1,142	670	23,800	16,600
IT	Federagri-Confcooperative	sectional overlap	voluntary	3,664	1,746	n.a.	n.a.
IT	Unionalimentari-Confapi	congruence	voluntary	1,000	1,000	20,000	20,000
IT	CNA Alimentare	sectionalism	voluntary	n.a.	n.a.	n.a.	n.a.
IT	Confartigianato Alimentazione	sectionalism	voluntary	38,820	38,820	37,151	37,151
IT	CASARTIGIANI	sectional overlap	voluntary	n.a.	n.a.	200,000	n.a.
IT	CLAAI	sectional overlap	voluntary	n.a.	n.a.	n.a.	n.a.
IT	FIPPA	sectionalism	voluntary	n.a.	n.a.	n.a.	n.a.
IT	Assopanificatori	sectionalism	voluntary	4,800	4,800	n.a.	n.a.
LT	na	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.

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	Employer organisation	Domain coverage	Type of membership	Companies total	Companies in sector	Employees total	Employees in sector
LU	FEDIL	overlap	voluntary	17	17	1,453	635
LV	LPUF	overlap	voluntary	31	31	6,000	6,000
LV	LADRIA	sectional overlap	voluntary	3	3	1,223	1,223
LV	LZS (ULFPI)	sectionalism	voluntary	8	8	2,930	2,930
LV	LGRPA	sectional overlap	voluntary	n.a.	n.a.	n.a.	n.a.
LV	LADS	sectionalism	voluntary	12	12	200	200
LV	LADA	sectionalism	voluntary	3	3	900	900
LV	LBDUA	sectionalism	voluntary	n.a.	n.a.	n.a.	n.a.
LV	LMB	sectionalism	voluntary	23	23	1,830	1,830
MT	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.
NL	FNLI	overlap	voluntary	450	400	7,500	7,500
PL	PFPZ	congruence	voluntary	25	25	n.a.	n.a.
PL	ZPPP	sectional overlap	voluntary	11	11	7,000	7,000
PT	FIPA						
PT	AIPAN	sectionalism	voluntary	na	na	na	n.a.
PT	ACIP	sectionalism	voluntary	na	na	na	n.a.
PT	APIC	sectionalism	voluntary	112	112	6,500	6,500
PT	ANIL	sectional overlap	voluntary	50	42	7,120	5,800
PT	ANICP	n.a.	voluntary	n.a.	n.a.	n.a.	n.a.
PT	ANCAVE	n.a.	voluntary	n.a.	n.a.	n.a.	n.a.
PT	AIPL	n.a.	voluntary	n.a.	n.a.	n.a.	n.a.
PT	APIAM	n.a.	voluntary	16	16	n.a.	n.a.
RO	Federation ROMALIMENTA	overlap	voluntary	n.a.	n.a.	90,638	90,638
SE	Li	sectional overlap	voluntary	890	890	47,000	47,000
SI	GZS - ZKŽP	overlap	voluntary	300	n.a.	10,850	n.a.
SI	ZDS	overlap	voluntary	n.a.	n.a.	n.a.	n.a.
SI	ZZS	???	voluntary	n.a.	n.a.	n.a.	n.a.
SK	SPPK	overlap	voluntary	1,592	108	n.a.	n.a.
SK	PKS	overlap	voluntary	44	40	n.a.	n.a.

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	Employer organisation	Domain coverage	Type of membership	Companies total	Companies in sector	Employees total	Employees in sector
SK	SCS	sectionalism	voluntary	2	2	350	350
SK	SZVPS	sectional overlap	voluntary	13	9	n.a.	n.a.
UK	FDF	congruence	voluntary	300	300	n.a.	n.a.
UK	SAMB	sectionalism	voluntary	395	395	18,000	11,300

Note: [a] = Please find a more detailed description of the employers' organisations in Table 9

n.a. = not available

Table 9: Employer organisations, domain coverage and domain description in relation to the food and drink sector, 2011

	National association	Domain coverage	Domain description
AT	FVNG	sectionalism	large enterprises (industry) engaged in the production of food and drink
AT	BILG	sectionalism	smaller enterprises: those engaged in trades in the sector and not in industry
BE	FEVIA	congruence	all companies in the sector
BG	USSPMB	sectional overlap	food companies
BG	OOPAB	sectionalism	food companies
BG	UMCF	sectional overlap	food companies
BG	UPBB	sectional overlap	food companies
BG	UBM	sectional overlap	food companies
BG	UBB	sectional overlap	companies in drink sector
CZ	PK ČR	overlap	all companies in the sector

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	National association	Domain coverage	Domain description
DE	BLL	overlap	all companies in the sector
DE	BVE	overlap	all companies in the sector
DE	ANG	overlap	all companies in the sector
DE	BDSI	sectionalism	food companies
DE	VdZ	sectionalism	food companies
DE	Association of German Industrial Bakers	sectional overlap	food companies
DE	German Bakers Confederation	sectionalism	private bakers
DE	DFV	sectionalism	private butchers
DK	DI	overlap	all companies in the sector
DK	MA	sectionalism	food companies
DK	BKD	sectionalism	food companies
DK	DSM	sectionalism	shops and small abbatoirs
EE	ETL	congruence	all companies in the sector
EL	GSEVEE	overlap	all companies in the sector
EL	SEV	sectional overlap	large enterprises
EL	SEVT	sectionalism	food industries
ES	FIAB	congruence	all companies in the sector
ES	AMACO	sectionalism	poultry abbatoirs
ES	CONFECARNE	sectionalism	meat manufacturing
ES	FNACV	sectionalism	tinned vegetables

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	National association	Domain coverage	Domain description
ES	AFHSE	sectionalism	companies specialised in the manufacture of flour and semolina
ES	AEFH	sectionalism	large manufacturers of ice cream
ES	ANIE	sectionalism	manufacture of sea products
ES	CESFACB	sectionalism	manufacture of prepared animal feeds
ES	FENIL	sectionalism	manufacture of dairy products
ES	TUMA	sectionalism	manufactures of nougat, candy and marzipan
ES	FEICOPESCA	sectionalism	fish and aquaculture products
ES	ASEPRHU	sectionalism	egg producers
ES	ANEABE	sectionalism	manufacture of bottled water
ES	UNIADE	sectionalism	rice growers
ES	AEFPA	sectionalism	pasta manufactures
FI	ETL	congruence	all companies in the sector
FR	ANIA	no data	no data
FR	ADEPALE	sectionalism	food companies with a least 10 employees
FR	USIPA	sectionalism	food companies
FR	FEDAROM	sectionalism	food companies

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	National association	Domain coverage	Domain description
FR	SNBR	sectionalism	beverage companies
FR	FEBPF	sectionalism	food companies
FR	ABF	sectional overlap	beverage companies
FR	FICT	sectionalism	food companies
FR	FNICG	sectional overlap	food companies
FR	CSEM	sectionalism	beverage companies
FR	FEDALIM	sectionalism	food companies
FR	SFIG	sectionalism	food companies
FR	UNIJUS	sectional overlap	beverage companies
FR	FNIL	congruence	all companies in the sector
FR	FNCL	sectionalism	cooperatives
FR	Alliance 7	sectionalism	food companies
FR	CSFL	sectionalism	food companies
FR	ANMF	sectionalism	food companies
FR	CSF	sectionalism	food companies
FR	FFS	sectionalism	beverage companies
FR	SNSF	sectionalism	food companies
FR	Chamber of French Refiners and Conditioners of Sugar	sectionalism	food companies
FR	National Union of Manufacturers of Frozen and Deep Frozen Products	sectionalism	food companies

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	National association	Domain coverage	Domain description
FR	SYFAB	sectionalism	food companies
FR	SNIV-SNCP	sectionalism	food companies
FR	FICGV	sectionalism	food companies
FR	FIA	sectionalism	food companies
HU	ÉFOSZ	sectional overlap	n.a.
HU	MPSZ	sectional overlap	n.a.
IE	IBEC	overlap	all companies in the sector
IT	Federalimentare	congruence	all companies in the sector
IT	AGCI-Agrital	sectional overlap	cooperatives
IT	Legacoop Agroalimentare	sectional overlap	cooperatives
IT	Federagri-Confcooperative	sectional overlap	cooperatives
IT	Unionalimentari-Confapi	congruence	all companies in the sector
IT	CNA Alimentare	sectionalism	craft companies
IT	Confartigianato Alimentazione	sectionalism	craft companies, SMEs, microenterprises and autonomous workers
IT	CASARTIGIANI	sectional overlap	craft companies
IT	CLAAI	sectional overlap	craft companies

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	National association	Domain coverage	Domain description
IT	FIPPA	sectionalism	companies that manufacture bakery and flour products (NACE Code 10.7)
IT	Assopanificatori	sectionalism	companies that manufacture bakery and flour products (NACE Code 10.7)
LU	FEDIL	overlap	all companies in the sector
LV	LPUF	overlap	all companies in the sector
LV	LADRIA	sectional overlap	companies
LV	LZS (ULFPI)	sectionalism	production of fish
LV	LGRPA	sectional overlap	food companies
LV	LADS	sectionalism	small breweries companies
LV	LADA	sectionalism	large breweries
LV	LBDUA	sectionalism	Soft-drink enterprises
LV	LMB	sectionalism	bakery companies
NL	FNLI	overlap	all companies in the sector
PL	PFPZ	congruence	all companies in the sector

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	National association	Domain coverage	Domain description
PL	ZPPP	sectional overlap	food and beer companies
PT	FIPA	no data	no data
PT	AIPAN	sectionalism	food companies in northern Portugal
PT	ACIP	sectionalism	food companies
PT	APIC	sectionalism	food companies
PT	ANIL	sectional overlap	companies whose activity is directly related to milk products (packaging, ingredients and technical equipment)
PT	ANICP	n.a.	n.a.
PT	ANCAVE	n.a.	n.a.
PT	AIPL	n.a.	n.a.
PT	APIAM	n.a.	n.a.
RO	Federation ROMALIMENTA	overlap	all companies in the sector
SE	Li	overlap	all companies in the sector
SI	GZS - ZKŽP	overlap	all companies in the sector
SI	ZDS	overlap	all companies in the sector
SI	ZZS	n.a.	n.a.
SK	SPPK	overlap	all companies in the sector
SK	PKS	overlap	all companies in the sector

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	National association	Domain coverage	Domain description
SK	SCS	sectionalism	food companies
SK	SZVPS	overlap	all companies in the sector
UK	FDF	congruence	all companies in the sector
UK	SAMB	sectionalism	bakeries in Scotland

In total, 115 sector-related employers' organisations are identified in 24 countries. Three countries (Cyprus, Lithuania and Malta) have no sector employer association. In nine of the 24 countries with employer associations, at least a proportion of the listed organisations are not party to collective bargaining (see Table 8). Of the countries for which related data are available, 19 have one or more organisations engaged in sector-related collective bargaining. Generally, business interest organisations may also deal with interests other than those related to industrial relations. Organisations specialised in matters other than industrial relations are commonly defined as 'trade associations' (see TN0311101S). Such sector-related trade associations also exist in the food and drink sector. In terms of their national scope of activities, not all the organisations are involved in collective bargaining. Table 9 shows that some organisations either primarily or exclusively act as trade organisations in their country. These include the following:

- PK ČR in the Czech Republic;
- BLL, BVV in Germany;
- ETL in Estonia;
- FIAB in Spain;
- FEDIL in Luxembourg;
- FNLI in the Netherlands;
- PFPZ in Poland;
- SPPK, PKS in Slovakia;
- FDF in the UK.

Moreover, all these organisations are members of FOODDRINKEUROPE. It must be stressed that, according to our selection criteria described above, all national organisations affiliated to FOODDRINKEUROPE, the EU-level employer association, are included in the study irrespective of whether they are involved in collective bargaining. The case of Latvia is noteworthy, however, insofar as it records eight organisations, none of which is engaged in collective bargaining or is a member of FOODDRINKEUROPE (LPUF was a member in the past). In nine of the 24 countries for which information on the sector-related organisational landscape is given, only one organisation has been established, while nine countries of the 24 (37.5%) record four or more organisations. Pluralist associational systems thus prevail in the trade unions and among employers in many European countries (although to a greater extent in the latter).

Moreover, the domain of employer organisations tends to be narrower than those of the trade unions. Of all of the organisations for which related information is available, 15% have overlapping domains and 20% have sectionally overlapping domains. Relatively few of these organisations have a cross-sectoral domain.

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Cases of domain overlaps arise from the coverage of different sectors. For instance, in Germany, overlap comes from covering refrigerated warehouse companies (BLL)and packaging companies (BE); in Latvia it arises from covering vocational education institutions (LPUF); in Sweden it derives from covering the manufacture of tobacco activities (LI); while in Slovenia and Slovakia it arises from covering agricultural activities (GZS – ZKŽP, SPPK). It should be noted that the only employer association recorded in Sweden, LI, does not cover public companies. However, as the national correspondent explains in the national report, there is no public ownership in the sector in Sweden. Bearing this in mind, we have defined the domain coverage of the organisation as overlap. In the case of Ireland, overlap arises from a general domain (IBEC is a cross-sectoral employer association). In the rest of the countries including organisations which record overlap (Denmark, Greece, Luxembourg, the Netherlands and Romania), no information is provided to this regard.

Sectionalist overlap usually derives from domain demarcations which focus on one activity of the food and drink sector, whether the manufacture of food or beverages, plus a variety of others:

- trade (USSPMB, UMCF, UPBB, UBM, UBB in Bulgaria, Association of German Industrial Bakers in Germany, UNIJUS in France, MPSZ in Hungary);
- the chemical industry (FNICG in France);
- research and consultation related to the food and drink sector (ÉFOSZ in Hungary);
- agriculture or fisheries (AGCI-Agrital, Legacoop Agroalimentare, Federagri-Confcooperative in Italy);
- packaging (ANIL in Portugal);
- glass production (SZVPS in Slovakia).

In addition, sectionalist overlap derives also from associations which have a general domain but cover only some specific organisations, such as craft companies (CASARTIGIANI, CLAAI in Italy) or cooperatives (AGCI-Agrital, Legacoop Agroalimentare, Federagri-Confcooperative in Italy.

Sectionalism is caused mainly by domain demarcations that focus on:

- company size (FVNG, BILG in Austria, OOPAB in Bulgaria);
- one subsector, whether manufacture of food or beverages;
- more specific sub-sectors, such as bakeries (BDSI in Germany, VdZ in Germany, German Bakers Confederation, BKD, MA in Denmark);
- one subsector and a specific company size (DSM in Denmark).

Notably, countries where sectionalism domain prevails, such as Spain, France, Portugal or Latvia, are characterised by a pronounced fragmentation of the associational landscape on the employers' side, with associations specialising in such narrowly defined activities as the manufacture of sea products, ice cream, animal feed, starch, flavourings, bakery items and meat products.

In line with this fragmentation, 57% of all the organisations have a membership domain that is sectionalist with regard to the sector. Only nine organisations, or 8% of all the organisations with available information show a domain more or less congruent with the sector definition. These are: FEVIA in Belgium; ETL in Estonia; FIAB in Spain; FENIL in France; ETL in Finland; Federalimentare and Unionalimentari-Confapi in Italy; PFPZ in Poland; and FDF in the United Kingdom. This means that the domain of these organisations largely focuses on the food and drink sector as defined above. However, it cannot be ruled out that these organisations may also organise companies of a contiguous sector, or may not really organise the entire sector. The clear predominance of membership domains that are sectionalist with regard to the sector indicates that the technocratic definition of the sector is broader than the lines along which most sector-related employers identify common interests and band together in associations.

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The two existing sector-related employer organisations in Austria can rely on obligatory membership. This is due to their public law status as chamber units.

Figure 6: Food and drink sector-related organisations/business associations and their domain patterns

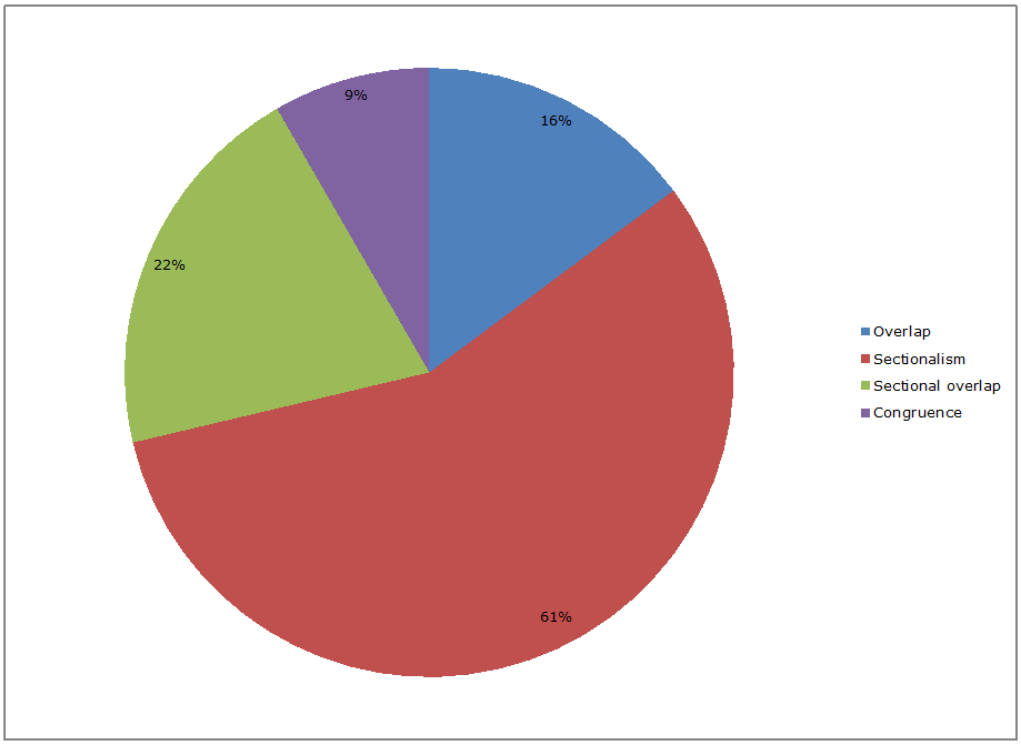

Figure 6: Food and drink sector-related organisations/business associations and their domain patterns

Note: n = 107

In countries with a pluralist structure in relation to employer organisations, these organisations have usually – with the exception of France and Hungary– managed to arrive at non-competing relationships (as seen in the case of Germany, Italy, Poland, Portugal, Slovenia, Slovakia and the UK). In many countries, their activities are complementary to each other as a result of interassociational differentiation by their membership demarcation (as is the case of Austria, Bulgaria, Denmark, Spain, Greece and Luxembourg). Moreover, it is worth noting that in Spain, France and Portugal, many of the associations which have a sectionalism domain are members of a broader national association of the food and drink sector (FIAB in Spain, ANIA in France and FIPA in Portugal).

As the figures on density show (Table 8), membership strength in terms of companies widely varies with regard to the sector-related densities. The same holds true of the densities in terms of employees. When information is available, the sectoral domain densities of companies tend to be lower than the density of employees, except in some cases in Austria (BILG), Denmark (BKD, DSM), Greece (GSEVEE), Italy (Confartigianato Alimentazione), Latvia (LADS), the Netherlands (FNLI), and the UK (SAMB). This indicates a slightly higher propensity on the part of larger companies to associate, as compared with their smaller counterparts. In general, densities of the employer/business organisations in the sector tend to be higher than trade union densities, especially with regard to the density of employees. In spite of this, the fragmentation implies that, of the associations for which related data are available, only 18.9% show a sectoral domain density exceeding 10% in terms of companies (2.7% having a density higher than 50%) and 36.9% show a sectoral domain density exceeding 10% in terms of employees (15.2% exceeding a density of 50%).

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In general, the data suggest that in the food and drink sector employers are very fragmented in their organisation according to different activities and business segments. However, it should be noted that density data are available for only a minority of the employer/business associations. Therefore the data should again be treated cautiously.

Collective bargaining and its actors

Table 6 lists all trade unions engaged in sector-related collective bargaining. Multiemployer bargaining is defined as being conducted by an employer organisation on behalf of the employer side. In the case of single-employer bargaining, the company or its divisions are party to the agreement. This includes cases where two or more companies jointly negotiate an agreement. The relative importance of multiemployer bargaining (measured as a percentage of the total number of employees covered by a collective agreement) therefore provides an indication of the impact of the employer organisations on the overall collective bargaining process.

In line with numerous cases of inter-union domain overlap and of unclear domain demarcation, in two countries (Portugal, France) inter-union rivalry and competition for bargaining capacities have been identified. In the case of the sector-related employer organisations, competition over collective bargaining capacities has been reported in the case of Hungary, between the Association of the Bakery Industry (which is a member of ÉFOSZ) and the Hungarian Baker Association.

Tables 6 and 10 record sector-related collective bargaining (single or multiemployer bargaining) in all countries but one (Estonia). No information is available for FZZPM and FZZPPC in Poland and the national report of Luxembourg does not provide information about unions' involvement in collective bargaining. However the following can be noted:

- 8.7% of sector-related unions with available information do not record participation in collective bargaining;
- 22.9% record participation in single-employer bargaining;
- 11.9% show participation in multi-employer bargaining;
- 56.5% show participation both in single and multi-employer bargaining.

Attention should be drawn to the case of Latvia, where the union LLPNAB does not directly conclude collective agreements but assists trade union organisations in companies that conclude single-employer collective agreements.

Table 10: Density, collective bargaining, consultation and affiliations of employer/business organisations in food and drink, 2011

	Employer organisation	Sectoral density companies (%)	Sectoral density employees (%)	Collective bargaining	Consultation		National, European & international affiliations
AT	FVNG	5.8	36.3	Yes, multiemployer	Yes, both	On a regular basis and on an ad-hoc basis	AIIBP,AIJN, IOFI, FOODDRINKEUROPE, FAIBP, ASSIFONTE, Brewers of Europe, CAOBISCO, CEPS,CLITRAVI, COFALEC,CPIV, ECF, ECSLA, ESA, EUROMALT, EFM, FEDIOL,FEFAC, FOC, ICC, IDACE, IMACE, EUPPA, UEPA, UFE, UNESDA, WKO

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	Employer organisation	Sectoral density companies (%)	Sectoral density employees (%)	Collective bargaining	Consultation		National, European & international affiliations
AT	BILG	100	59.2	Yes, multiemployer	Yes, both	On an ad-hoc basis	WKO
BE	FEVIA	10.1	60.2	Yes, both	Yes, within tripartite structures	On a regular basis	FOODDRINKEUROPE, VBO, VOKA, UWE, BECI
BG	USSPMB	0.2	1.9	Yes, both	Yes, within tripartite structures	On a regular basis and on an ad-hoc basis	BIA
BG	OOPAB	0.3	1.3	Yes, both	Yes, both	On a regular basis and on an ad-hoc basis	BIA
BG	UMCF	1.0	4.3	Yes, multiemployer	Yes, unilaterally	On an ad-hoc basis	BIA
BG	UPBB	1.1	n.a.	Yes, multiemployer	Yes, unilaterally	On a regular basis and on an ad-hoc basis	Copa Cogeca, BIA
BG	UBM	0.6	n.a.	Yes, both	Yes, unilaterally	On an ad-hoc basis	The European Flour Millers' Association, BIA
BG	UBB	0.1	1.5	Yes, both	Yes, both	???	Brewers of Europe, BIA
CY	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	
CZ	PK ČR	n.a.	n.a.	No	Yes, unilaterally	On an ad-hoc basis	FOODDRINKEUROPE
DE	BLL	n.a.	n.a.	No	Yes, within tripartite structures	On a regular basis	FOODDRINKEUROPE, Partner association of ANG.
DE	BVE	n.a.	n.a.	No	n.a.	n.a.	FOODDRINKEUROPE, BDI
DE	ANG	n.a.	n.a.	Yes, multiemployer	Yes, both	On a regular basis and on an ad-hoc basis	BusinessEurope (indirectly), AEFD, FDE, BusinessEurope, AEFD,BDA
DE	BDSI	0.5	n.a.	Yes, multiemployer	Yes, within tripartite	On a regular basis	ICA, CAOBISCO, ESA, Euroglaces, BVE, BLL, ANG

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	Employer organisation	Sectoral density companies (%)	Sectoral density employees (%)	Collective bargaining	Consultation		National, European & international affiliations
					structures		
DE	VdZ	0.0	0.8	Yes, multiemployer	n.a.	n.a.	CEFS. BDA, BDI, BVE.
DE	n.a.	0.2	5.3	Yes, multiemployer	Yes, unilaterally	On a regular basis and on an ad-hoc basis	AIBI , BZV
DE	n.a.	34.7	45.2	Yes, multiemployer	n.a.	n.a.	UIB, CEBP, ZDH, BLL
DE	DFV	n.a.	n.a.	Yes, multiemployer	n.a.	n.a.	IBC, IBC, ZDH
DK	DI	16.5	78.6	Yes, multiemployer	Yes, unilaterally	On an ad-hoc basis	BIAC, Business Europe, FOODDRINKEUROPE, DA
DK	MA	1.2	15.2	Yes, multiemployer	Yes, unilaterally	On an ad-hoc basis	BIAC, FOODDRINKEUROPE(indirectly, through DI), DA (through DI)
DK	BKD	38.2	26.8	Yes, multiemployer	Yes, unilaterally	On an ad-hoc basis	Eurocommerce, Eurochambers, Danish Chamber of Commerce
DK	DSM	24.4	8.9	Yes, multiemployer	Yes, unilaterally	On an ad-hoc basis	
EE	ETL	13.7	96.1	No	Yes, both	On an ad-hoc basis	FOODDRINKEUROPE, ETTK, Kaubanduskoda, EPKK, Kutsekoda
EL	GSEVEE	59.6	26.6	Yes, both	No		UEAPME
EL	SEV	n.a.	n.a.	Yes, multiemployer	n.a.	n.a.	
EL	SEVT	n.a.	n.a.	Yes, multi-employer	n.a.	n.a.	FOODDRINKEUROPE
ES	FIAB	26.4	n.a.	No			FOODDRINKEUROPE, CEOE
ES	AMACO	0.3	3.1	Yes, multi-employer	Yes, unilaterally	On an ad-hoc basis	COPA COCEGA,
ES	CONFECARNE	n.a.	n.a.	Yes, multi-	n.a.	n.a.	FIAB

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	Employer organisation	Sectoral density companies (%)	Sectoral density employees (%)	Collective bargaining	Consultation		National, European & international affiliations
				employer			
ES	FNACV	n.a.	n.a.	Yes, multi-employer	n.a.	n.a.	FIAB
ES	AFHSE	0.4	n.a.	Yes, multiemployer	n.a.	n.a.	EFM, FIAB
ES	AEFH	0.0	n.a.	Yes, multiemployer	n.a.	n.a.	
ES	ANIE	n.a.	n.a.	Yes, multiemployer	n.a.	n.a.	FIAB
ES	CESFACB	0.0	n.a.	Yes, multiemployer	Yes, unilaterally	On an ad-hoc basis	FEFAC, FIAB
ES	FENIL	0.3	n.a.	Yes, multiemployer	n.a.	n.a.	FIAB
ES	TUMA	n.a.	n.a.	Yes, multiemployer	n.a.	n.a.	
ES	FEICOPESCA	n.a.	n.a.	Yes, multiemployer	n.a.	n.a.	FIAB
ES	ASEPRHU	n.a.	n.a.	Yes, multiemployer	n.a.	n.a.	UPA, FIAB
ES	ANEABE	n.a.	n.a.	Yes, multiemployer	n.a.	n.a.	EFBW, FIAB
ES	UNIADE	0.0	n.a.	Yes, multiemployer	n.a.	n.a.	FIAB
ES	AEFPA	n.a.	n.a.	Yes, multiemployer	n.a.	n.a.	
FI	ETL	16.4	76.2	Yes, multiemployer	Yes, within tripartite structures	On a regular basis	FOODDRINKEUROPE, Confederation of the Food and Drink Industries of the EU, CIAA, Confederation of Finnish Industries, EK
FR	ANIA	n.a.	n.a.	n.a.	n.a.	n.a.	FOODDRINKEUROPE
FR	ADEPALE	0.4	7.4	Yes, multiemployer	Yes, unilaterally	On a regular basis	FOODDRINKEUROPE (indirectly, through ANIA)
FR	USIPA	0.0	n.a.	Yes,	n.a.	n.a.	FOODDRINKEUROPE

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	Employer organisation	Sectoral density companies (%)	Sectoral density employees (%)	Collective bargaining	Consultation		National, European & international affiliations
				multiemployer			(indirectly, through ANIA)
FR	FEDAROM	0.1	0.4	Yes, multiemployer			FOODDRINKEUROPE (indirectly, through ANIA), FEDALIM,
FR	SNBR	0.0	0.9	Yes, multiemployer	n.a.	n.a.	FOODDRINKEUROPE (indirectly, through ANIA)
FR	FEBPF	0.3	n.a.	Yes, multiemployer	n.a.	n.a.	FOODDRINKEUROPE (indirectly, through ANIA)
FR	ABF	0.2	n.a.	Yes, multiemployer	n.a.	n.a.	FOODDRINKEUROPE (indirectly, through ANIA)
FR	FICT	0.4	6.6	Yes, multiemployer	Yes, unilaterally	On an ad-hoc basis	FOODDRINKEUROPE (indirectly, through ANIA), CLITRAVI
FR	FNICG	n.a.	n.a.	Yes, multiemployer	n.a.	n.a.	FOODDRINKEUROPE (indirectly, through ANIA), IPTA
FR	CSEM	0.0	n.a.	Yes, multiemployer	n.a.	n.a.	FOODDRINKEUROPE (indirectly, through ANIA)
FR	FEDALIM	n.a.	n.a.	Yes, multiemployer	n.a.	n.a.	FOODDRINKEUROPE (indirectly, through ANIA)
FR	SFIG	0.0	n.a.	Yes, multiemployer	n.a.	n.a.	FOODDRINKEUROPE (indirectly, through ANIA)
FR	UNIJUS	n.a.	n.a.	Yes, multiemployer	n.a.	n.a.	FOODDRINKEUROPE (indirectly, through ANIA)
FR	FNIL	0.2	9.7	Yes, multiemployer	n.a.	n.a.	FOODDRINKEUROPE (indirectly, through ANIA)
FR	FNCL	0.6	n.a.	Yes, multiemployer	n.a.	n.a.	FOODDRINKEUROPE (indirectly, through ANIA)
FR	Alliance 7	0.7	9.2	Yes, multiemployer		On a regular basis	FOODDRINKEUROPE (indirectly, through ANIA)
FR	CSFL	0.0	n.a.	Yes, multiemployer	n.a.	n.a.	FOODDRINKEUROPE (indirectly, through ANIA), COFALEC, EU, Yeast Industry
FR	ANMF	0.5	1.2	Yes, multiemployer	Yes, within tripartite structures	On an ad-hoc basis	FOODDRINKEUROPE (indirectly, through ANIA), European Flour Millers' association,

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	Employer organisation	Sectoral density companies (%)	Sectoral density employees (%)	Collective bargaining	Consultation		National, European & international affiliations
							IPTA
FR	CSF	0.0	n.a.	Yes, multiemployer	Yes, unilaterally	On an ad-hoc basis	FOODDRINKEUROPE (indirectly, through ANIA)
FR	FFS	0.3	n.a.	Yes, multiemployer	Yes, unilaterally	On a regular basis	FOODDRINKEUROPE (indirectly, through ANIA)
FR	SNSF	n.a.	n.a.	Yes, multiemployer	n.a.	n.a.	FOODDRINKEUROPE (indirectly, through ANIA), IPTA
FR	-	n.a.	n.a.	Yes, multiemployer	n.a.	n.a.	FOODDRINKEUROPE (indirectly, through ANIA)
FR	-	0.1	n.a.	Yes, multiemployer	n.a.	n.a.	FOODDRINKEUROPE (indirectly, through ANIA)
FR	SYFAB	0.0	n.a.	Yes, multiemployer	n.a.	n.a.	
FR	SNIV-SNCP	0.1	6.8	Yes, multiemployer	Yes, both	On a regular basis and on an ad-hoc basis	CLITRAVI
FR	FICGV	0.5	n.a.	Yes, multiemployer	Yes, both	On a regular basis	UECBV
FR	FIA	n.a.	n.a.	Yes, multiemployer	No		
HU	ÉFOSZ	13.1	n.a.	Yes, both	Yes, unilaterally	On an ad-hoc basis	FOODDRINKEUROPE, MGYOSZ
HU	MPSZ	n.a.	n.a.	Yes, both	Yes, unilaterally	On an ad-hoc basis	International bakeries association, European bakeries association, MGYOSZ, IPOSZ
IE	IBEC	n.a.	n.a.	Yes, single-employer	No		FOODDRINKEUROPE, AIM
IT	Federalimentare	11.3	100	Yes, both	Yes, both	On an ad-hoc basis	FOODDRINKEUROPE, Confindustria
IT	AGCI-Agrital	0.9	2.2	Yes, both	Yes, both	n.a.	International Cooperative Alliance, EUROPECHE, COGECA, AGCI
IT	Legacoop Agroalimentare	1.2	5.0	Yes, both	Yes, within tripartite	On a regular basis	International Cooperative Alliance, COGECA, Legacoop,

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	Employer organisation	Sectoral density companies (%)	Sectoral density employees (%)	Collective bargaining	Consultation		National, European & international affiliations
					structures		Lega Nazionale delle Cooperative e Mutue
IT	Federagri-Confcooperative	3.0	n.a.	Yes, both	Yes, within tripartite structures	On an ad-hoc basis	International Cooperative Alliance, COGECA, Confcooperative, Confederazione Cooperative Italiane
IT	Unionalimentari-Confapi	1.7	6.0	Yes, both	Yes, unilaterally	On an ad-hoc basis	UEAPME, European crafts, trades and SMEs CONFAPI, Confederazione italiana della piccola e media industria privata
IT	CNA Alimentare	n.a.	n.a.	Yes, both	Yes, within tripartite structures	On an ad-hoc basis	UEAPME, European crafts, trades and SMEs CNA, Confederazione Nazionale dell'Artigianato e della Piccola e Media Impresa
IT	Confartigianato Alimentazione	67.2	11.1	Yes, both	Yes, unilaterally	On an ad-hoc basis	UEAPME, European crafts, trades and SMEs Confartigianato, Rete Imprese Italia
IT	CASARTIGIANI	n.a.	n.a.	Yes, both	n.a.	n.a.	Rete Imprese Italia
IT	CLAAI	n.a.	n.a.	Yes, both	n.a.	n.a.	
IT	FIPPA	n.a.	n.a.	Yes, both	n.a.	n.a.	
IT	Assopanificatori	8.3	n.a.	Yes, both	n.a.	n.a.	FIESA, Confesercenti
LT	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	
LU	FEDIL	n.a.	12.7	No	Yes, unilaterally	On an ad-hoc basis	FOODDRINKEUROPE, FEDIL
LV	LPUF	4.2	23.3	No	Yes, both	On a regular basis	LDDK
LV	LADRIA	0.4	4.7	No	Yes, unilaterally	On an ad-hoc basis	CEPS, LPUF, LDDK
LV	LZS (ULFPI)	1.1	11.4	No	Yes, both	On a regular basis	LDDK, LPUF
LV	LGRPA	n.a.	n.a.	No	Yes, both	On a regular basis	LPUF, LDDK
LV	LADS	1.6	0.8	No	Yes, unilaterally	On an ad-hoc basis	LDDK

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	Employer organisation	Sectoral density companies (%)	Sectoral density employees (%)	Collective bargaining	Consultation		National, European & international affiliations
LV	LADA	0.4	3.5	No	Yes, unilaterally	On an ad-hoc basis	LDDK, LPUF, LTRK (through member companies)
LV	LBDUA	n.a.	n.a.	No	Yes, unilaterally	On an ad-hoc basis	LDDK
LV	LMB	3.1	7.1	No	Yes, unilaterally	On an ad-hoc basis	LPUF, LDDK
MT	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	
NL	FNLI	9.2	6.1	No	No		FOODDRINKEUROPE, VNO-NCW, VRAAG
PL	PFPZ	0.4	n.a.		Yes, unilaterally	On an ad-hoc basis	EPODE, International Network, FOODDRINKEUROPE, European Dietetic Food Industry Association, IDACE
PL	ZPPP	0.2	1.6	Yes, single-employer	Yes, unilaterally	On a regular basis	The Brewers of Europe
PT	FIPA						FOODDRINKEUROPE
PT	AIPAN	n.a.	n.a.	Yes, multi-employer	n.a.	n.a.	
PT	ACIP	n.a.	n.a.	Yes, multi-employer	n.a.	n.a.	
PT	APIC	1.9	7.5	Yes, multiemployer	Yes, unilaterally	On an ad-hoc basis	CLITRAVI, UECBV
PT	ANIL	0.7	6.7	Yes, multiemployer	Yes, both	On a regular basis	EDA, FIPA
PT	ANICP	n.a.	n.a.	Yes, multiemployer	n.a.	n.a.	
PT	ANCAVE	n.a.	n.a.	Yes, multiemployer	n.a.	n.a.	
PT	AIPL	n.a.	n.a.	Yes, multiemployer	n.a.	n.a.	
PT	APIAM	0.3	n.a.	Yes, multiemployer	n.a.	n.a.	FIPA
RO	Federation ROMALIMENT	n.a.	49.0	Yes, both	Yes, within	On an ad-hoc basis	FOODDRINKEUROPE

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	Employer organisation	Sectoral density companies (%)	Sectoral density employees (%)	Collective bargaining	Consultation		National, European & international affiliations
	A				tripartite structures		
SE	Li	46.2	90.1	Yes, both	Yes, unilaterally	On a regular basis	FOODDRINKEUROPE, Confederation of Swedish Enterprise
SI	GZS - ZKŽP	n.a.	n.a.	Yes, multiemployer	Yes, within tripartite structures	On a regular basis	IADSA, FOODDRINKEUROPE, WAPA, AIBI,EHPM, CAOBISCO, COCERAL, UNESDA, EFM, FEFAC, Chamber of Commerce of Slovenia
SI	ZDS	n.a.	n.a.	Yes, multiemployer	Yes, within tripartite structures	On a regular basis	BIAC, OECD, IOE – ILO, Eurofound, BUSINESSEUROPE
SI	ZZS	n.a.	n.a.	Yes, multiemployer	Yes, within tripartite structures	On a regular basis	ICA, COGECA, EESO
SK	SPPK	7.5	n.a.	No	Yes, within tripartite structures	On an ad-hoc basis	COPA,FOODDRINKEUROPE, AZZZ, SR
SK	PKS	2.8	n.a.	No	Yes, unilaterally	On an ad-hoc basis	FOODDRINKEUROPE, RÚZ, SR
SK	SCS	0.1	0.7	Yes, multi-employer	Yes, both	On an ad-hoc basis	CEFS, SPPK
SK	SZVPS	0.6	n.a.	Yes, multi-employer	Yes, unilaterally	On an ad-hoc basis	The Brewers of Europe, SPPK
UK	FDF	4.2	n.a.	No		On an ad-hoc basis	FOODDRINKEUROPE
UK	SAMB	5.5	3.0	Yes, multi-employer		On an ad-hoc basis	

From the employers' side, 15.2% of the organisations (all the organisations for which information is available) do not record participation in collective bargaining. Only 1.8% participate in single-employer bargaining, 64% in multiemployer bargaining and 19% record participation both in single and multiemployer bargaining.

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Figure 7: Involvement of the included organisations in different forms of collective bargaining (%)

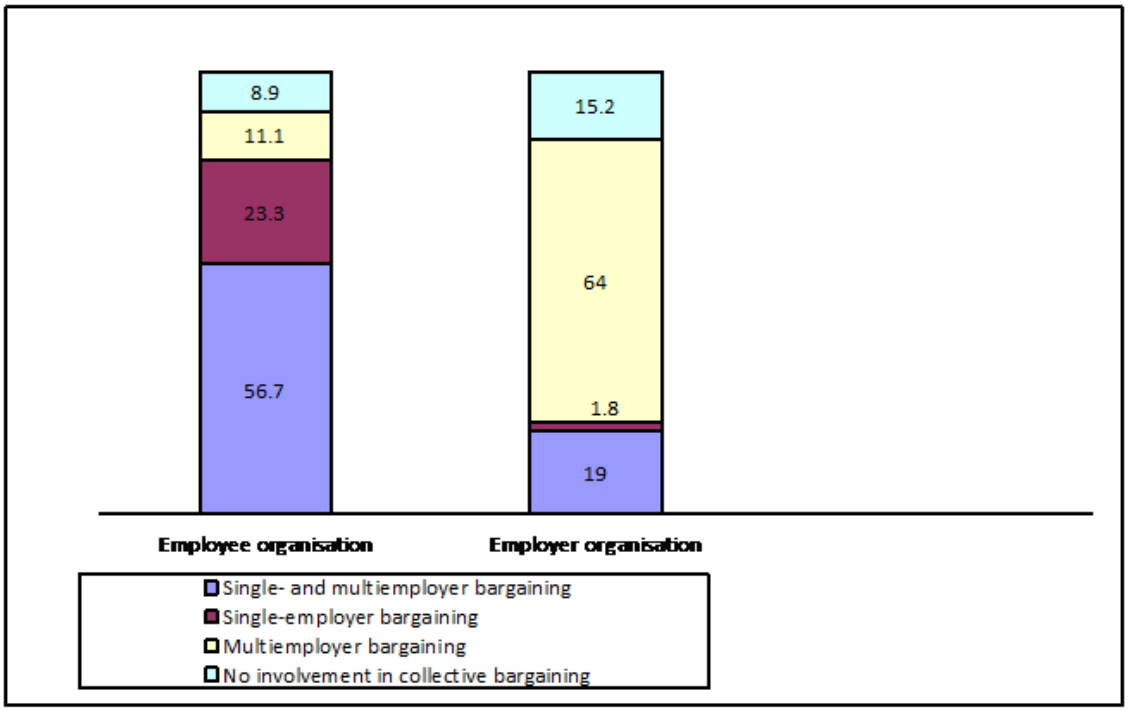

Figure 7: Involvement of the included organisations in different forms of collective bargaining (%)

Source: EIRO national contributions

The data presented in Table 11 provides an overview of the system of sector-related collective bargaining in the 27 countries. The importance of collective bargaining as a means of employment regulation is measured by calculating the total number of employees covered by collective bargaining as a proportion of the total number of employees within a certain segment of the economy (Traxler et al, 2001). Accordingly, the sector's rate of collective bargaining coverage is defined as the ratio of the number of employees covered by any kind of collective agreement to the total number of employees in the sector.

Table 11: The system of sectoral collective bargaining, 2011

Country	CBC (estimates, %)	Share of MEB (estimates, %)	Extension practices[a]
AT	100	MEB prevailing	n.a.
BE	100	MEB prevailing	2
BG	5	n.a.	1
CY	n.a.	n.a.	0
CZ	45	0	n.a.
DE	n.a.	MEB prevailing	2[c]
DK	100	MEB prevailing	0
EE	n.a.	0	n.a.
EL	n.a.	n.a.	0[d]
ES	97	91	2

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FI	100	85	2
FR	n.a.	n.a.	2
HU	20	SEB prevailing	n.a.
IE	n.a.	0	0
IT	n.a.	MEB prevailing	2[c]
LT	25	0	n.a
LU	69	n.a.	0
LV	<10	0	1
MT	30	0	n.a.
NL	90	It varies depending on the subsector, from 90 (dairy) to 30 (drink)	1
PL	30	0	n.a.
PT	<30	99	0[d]
RO	100	MEB prevailing	1[d]
SE	80–90	90	1
SI	100	MEB prevailing	n.a.
SK	6–7	MEB prevailing	1
UK	28	SEB prevailing	0

Notes: CBC = collective bargaining coverage: employees covered as a percentage of the total number of employees in the sector

MEB = multiemployer bargaining relative to single-employer bargaining

SEB = single-employer bargaining

[a] = 0 = no practice, 1 = limited/exceptional, 2= pervasive. Cases of functional equivalence are put in parenthesis.

[b] = 2007

[c] = informal extension practices regarding wage agreements

[d] = extension practices abolished or limited in 2011 or 2012

n.a. = not available or applicable

Collective bargaining coverage

In terms of the sector's collective bargaining coverage, 10 of the 21 countries with available data record at least a 50% rate of coverage. Moreover, nine of these 10 countries record a coverage rate of 80% or higher. This shows a highly polarised collective bargaining coverage system among the European countries. Countries with very high coverage are mainly Scandinavian (Denmark, Finland, and Sweden) together with some countries that usually record high rates of coverage in other sectors: Belgium and Austria, for instance, which record almost 100% coverage. One noteworthy case is Spain, which records a 97% rate of coverage in the food and drink sector and a rate lower than 60% on average in all sectors. The coverage of collective bargaining is low in some of the older Member States, such as Portugal (30%) and the UK (28%). In the former, the coverage dropped by 10 percentage points in 2011, given that multi-employer agreements ceased to be extended to employers not affiliated with the signatory employer associations, enacted under the regime of the Memorandum of Understanding

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between the Troika and the Portuguese government. Collective bargaining coverage is also low in most of the accession countries:

- Czech Republic (45%);
- Poland (38%);
- Lithuania (25%);
- Hungary (20%);
- Latvia (10%);
- Slovakia (7%).

However, in Slovenia and Romania, which usually record high rates of coverage in other sectors, the rate of coverage is 100%.

In most of the countries with available information, several factors, which sometimes interact with each other, account for the higher coverage rates:

- the predominance of multiemployer bargaining (see Table 11);
- relatively higher density rates for the trade unions and/or employer organisations (Denmark, Finland, Sweden and Austria);
- the existence of pervasive extension practices, as in Belgium, Spain and Finland;
- the existence of a widely covering multiemployer collective agreement (Slovenia, Romania).

While coverage in countries with prevalent multi-employer bargaining is generally high (with the exception of Slovakia), single-employer bargaining arrangements in the sector are the only type of bargaining in the Czech Republic, Estonia, Ireland, Lithuania, Latvia, Malta and Poland and they prevail in the UK and Hungary. In these countries, collective bargaining coverage tends to be rather low.

Due to the relevant presence of multiemployer settlements in the sector, the use of extension practices is significant. Extension practices in the food and drink sector are reported for several countries (see Table 11). But in the case of Greece (GR1203019I), and of Romania and Portugal (see above), legislation in 2011 eliminated extension practices.

Participation in public policy

Interest associations may influence public policy in two ways:

- they may be consulted by the authorities on matters affecting their members;
- they may be represented on 'corporatist', in other words tripartite, committees and boards of policy concertation.

This study considers only cases of consultation and corporatist participation that explicitly relate to sector-specific matters. Consultation processes can be wide-ranging and, therefore, the organisations consulted by the authorities may vary according to the issues and also depend on changes in government. Moreover, the consultation may be occasional rather than regular.

Trade unions or interest representations

Some 49 of the 70 (70%) of the sector-related unions with available data have been consulted. Consultation is mainly developed unilaterally in 47% of the cases. Authorities consult unions in 19 of the 27 countries where sector-related trade unions are recorded. However unions are regularly consulted only in Austria, Belgium, Bulgaria, Germany, Finland, France, the Netherlands, Slovenia, Sweden and Slovakia.

Since a multi-union system has been established in 21 of the 27 countries with sector-related trade unions, it cannot be ruled out that the authorities favour certain trade unions over others, or that the unions compete for participation rights. In most countries with a multi-union system where a noticeable practice of consultation is observed, any existing trade unions may take part in the consultation process. By contrast, in Austria, Spain, Finland, Ireland, Italy, Sweden and the UK only some of the sector-related trade unions are consulted.

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Employer organisations or business associations

Authorities consult 61 of the 65 (93.8%) employers' organisations for which related data are available. Employers' organisations are consulted in 21 of 24 countries with sector-related organisations. However, organisations are not regularly consulted in Czech Republic, Denmark, Estonia, Spain, Hungary, Romania, Slovakia or the UK. In most countries with a multi-organisation system where a practice of consultation is recorded, any existing employer organisation may take part in the consultation process. By contrast, in Germany, Spain, France, Italy and Portugal, only a part of the sector-related organisations are consulted.

Tripartite participation

The findings reveal that genuine sector specific bodies have been established in 16 of the 27 countries under consideration (Table 12). Tripartite bodies have been established in Belgium, Bulgaria, Germany, Estonia, Italy, Latvia, Romania, Slovenia, Slovakia and the UK. The scope of activity of the tripartite bodies is focused on:

- legislative issues;
- health and safety (Belgium, UK);
- detection of undeclared work (Germany);
- qualifications (Estonia);
- general sectoral issues (Italy, Latvia);
- cross-sectoral issues (Slovakia, Slovenia).

Table 12: Tripartite and bipartite sector-specific boards of public policy (2011)

	Name of the body and scope of activity	Bipartite/Tripartite	Origin	Trade unions participating	Employer organisations participating
BE	Joint Committee 118; Joint Committee 220; Central Economic Council – special advisory committee sector Food; Training advisor for the food industry (IPV-IFP); VIA: Social Fund Food Industry; Federal Agency for the Safety of the Food Chain; Federal Agency for the Safety of the Food Chain	All bipartite, except the latter, which is tripartite	statutory	All unions for blue-collar workers involved (Joint Committee 118); All unions for white-collar workers involved (Joint Committee 220); in the rest of the bodies all the unions are involved	FEVIA
BG	Sectoral Council for Tripartite Cooperation for Food Industry: Labour and Social Legislation; Specific Legislation for the sector and transposition of EU Directives; health and safety; excise goods.	Tripartite	Statutory	FITU-Food, NFFI – Podkrepa, TUB	USSPP, UBB, OOPAB

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	Name of the body and scope of activity	Bipartite/Tripartite	Origin	Trade unions participating	Employer organisations participating
DE	Employers' liability association (Berufsgenossenschaft Nahrungsmittel und Gastgewerbe, BNG); Cooperation for detecting undeclared work in the meat processing sector (Finanzkontrolle Schwarzarbeit)	Tripartite	Statutory, agreement – Cooperation for detecting undeclared work in the meat processing sector (Finanzkontrolle Schwarzarbeit)	NGG	Representatives from different companies and associations; no data – Cooperation for detecting undeclared work in the meat processing sector (Finanzkontrolle Schwarzarbeit)
DK	The Joint Committee of Dairies; the Joint Committee of Abattoirs; the Vocational Training Committee of Bakers and Confectioners; the Working Environment Committee of the Dairy Industry; the Working Environment Committee of the Abattoirs	All the bodies quoted are bipartite	Statutory	NNF, DMF, 3F, HK/Privat	n.a.
EE	Estonian Qualifications Authority (Kutsekoda)	Tripartite	Statutory	Confederation of Estonian Food and Landworkers' Unions (ETMK)	Association of Estonian Food Industry (ETL)
FI	Working group of the development of salary systems; Working group of the use of external (TAW) labour; Working group of the cold and hot working	Bipartite	Agreement	Finnish Food Workers' Union SEL	Finnish Food and Drink Industries Federation ETL
FR	AGEFAFORIA, Organisme Paritaire Collecteur Agréé OBSERVIA » Observatoire des métiers et des qualifications de l'agroalimentaire	Bipartite	Agreement	CFE-CGC CSFV-CFTC FGTA-FO FNAF-CGT FGA-CFDT	Alliance 7, Adepale, CSFL, CSRCSF, SNFS, Comité français du café, Syndicat français des fabricants de café soluble, SNICC, FEDALIM (for SNFBP, FICF, SNFV, SNPE,

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	Name of the body and scope of activity	Bipartite/Tripartite	Origin	Trade unions participating	Employer organisations participating
					STEPI, SCF, FICT, FNIL, SFIG, SIFPAF.
HU	Social dialogue committee for food industry (since 2003) Subsector: Social dialogue committee for bakery and confectionary industry (since 2011)	Bipartite	Agreement	ÉDOSZ; HDSZ, MÉDOSZ	ÉFOSZ
IT	Sectoral negotiating tables (Tavoli di filiera) at the Ministry of Agriculture and Forestry (dairy, sheep/goats, rice, fruit and nuts…); Bilateral and Sectoral Observatory (food and drink sector) General sectoral issues, labour market, professional training, etc.; EBIPAN (Bilateral body-baking) Monitoring of sectoral professional training, supplementary health assistance and so on. In addition, the Italian report quotes security funds promoted by the social actors in tandem with the various NCAs (supplementary social security funds, health assistance funds).	Tripartite; the second and third bodies quoted are bipartite	Statutory; the second and third bodies quoted are set up by agreement	Flai-Cgil, Fai-Cisl, Uila-Uil, UGL, Agroalimentare	Federalimentare, Fedagri-Confcooperative, Legacoop-Agroalimentare, AGCI-Agrital, CNA, Assopanificatori
LV	National Tripartite Cooperation Council (NTSP): General	Tripartite	Statutory	LBAS	LDDK

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	Name of the body and scope of activity	Bipartite/Tripartite	Origin	Trade unions participating	Employer organisations participating
	framework, including sector specific policies				
PT	Sectoral consultative commission (Comissão Consultiva Sectorial)	No information	No information	No information	ANIL
RO	Commission at MECMA level	Tripartite	Statutory	All the national representative trade union confederations	All the national representative employer associations
SI	Economic and Social Council of the Republic of Slovenia (ESC)	Tripartite	Agreement	Association of Free Trade Unions of Slovenia	The Association of Employers of Slovenia; Chamber of Commerce and Industry of Slovenia
SK	Economic and Social Council (HSR)	Tripartite	Statutory	OZP SR	SPPK
UK	Food and drink manufacture health and safety forum; Improve – food and drink skills council	Tripartite	Agreement, statutory (Improve – food and drink skills council)	BFAWU, GMB, Unite, USDAW, Union representative(s) yet to be appointed (Improve – food and drink skills council)	FDF, FDF, SAMB (Improve – food and drink skills council)

Analysis of the European level of interest representation

At European level, eligibility for consultation and participation in social dialogue are linked to three criteria as defined by the European Commission communication on adapting and promoting social dialogue at Community level (2.8Mb PDF). Accordingly, a social partner organisation must have the following attributes. 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 Member States' social partner structures and have the capacity to negotiate agreements, and that are representative of several Member States;
- have adequate structures to ensure their effective participation in the work of the Committees.

Regarding social dialogue, the constituent feature is the ability of such organisations to negotiate on behalf of their members and to conclude binding agreements. Accordingly, this section on European associations of the food and drink sector will analyse these organisations' membership domain, the composition of their membership and their ability to negotiate.

As outlined in greater detail below, one sector-related European association on the employee side (EFFAT) and one on the employer side (FOODDRINKEUROPE) are particularly

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significant in the food and drink sector; they are listed by the European Commission as a social partner organisation consulted under Article 154 of the TFEU. Hence, the following analysis will concentrate on these organisations while providing supplementary information on others that are linked to the sector's national industrial relations actors.

Membership domain

The European Federation of Food, Agriculture and Tourism trade union (EFFAT) is affiliated to the European Trade Union Confederation (ETUC) and organises workers from the food and drink industry, agriculture and tourism. It represents 120 national organisations from 35 European countries.

The FOODDRINKEUROPE federation organises food and drink industry companies. It represents 26 national federations (including three observer national federations), 26 EU sector's associations and 19 major food and drink companies in European countries.

Membership composition

Table 13 documents a list of membership-related trade unions for EFFAT drawn from the country reports. This membership list is confined to the sector-related associations of the countries under consideration: hence, it does not include members of the European-level organisations that do not have any members in the food and drink sector. The membership of employee organisations is obtained through the membership list provided by the organisations and a further check of the membership lists published on the organisations' webpages. It should be noted that, in the list of members of EFFAT, the union TUB (in Bulgaria) is entered as KNSB.

Table 13: EFFAT sector-related membership (2011)

	Trade union	Collective bargaining	Geographical coverage
AT	GPA-djp	Yes, both	The whole country
AT	PRO-GE	Yes, both	The whole country
BE	ABVV-FGTB HORVAL	Yes, both	The whole country
BE	ABVV-BBTK/FGTB-SETCA	Yes, both	The whole country
BE	ACV Voeding en diensten – CSC Alimentation et Services	Yes, both	The whole country
BE	LBC-NVK	Yes, both	Dutch-speaking and bilingual region

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	Trade union	Collective bargaining	Geographical coverage
BE	CNE-CSC	Yes, both	The whole country
BE	ACLVB – CGSLB	Yes, both	The whole country
BG	FITU-Food	Yes, both	The whole country
BG	FKP-PODKREPA	Yes, both	The whole country
BG	TUB	Yes, both	The whole country
CY	OVIEK-SEC	Yes, both	The whole country
DE	NGG	Yes, both	The whole country
DK	NNF	Yes, both	The whole country
DK	HK/Handel	Yes, both	The whole country
DK	CO-industri	Yes, multi-employer bargaining only	The whole country
DK	DMF (Affiliated by means of Serviceforbundet)	Yes, both	The whole country
DK	3F	Yes, both	The whole country
EL	POEEYTE	Yes, multi-employer bargaining only	The whole country
ES	FEAGRA-COO	Yes, both	The whole country
ES	FITAG-UGT	Yes, both	The whole country
ES	ELA-STV	Yes, both	The Basque Country region
FI	SEL	Yes, multi-employer	The whole country

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	Trade union	Collective bargaining	Geographical coverage
		bargaining only	
FI	PRO	Yes, both	The whole country
FR	CFE-CGC Agro	Yes, both	The whole country
FR	FGA-CFDT	Yes, both	The whole country
FR	FGTA-FO	Yes, both	The whole country
HU	EDOSZ	Yes, single-employer	The whole country
HU	HDSZ	Yes, single-employer	The whole country
HU	MEDOSZ	No	The whole country
HU	EDSZ	Yes, single-employer	The whole country
IE	SIPTU	Yes, single-employer	The whole country
IT	FLAI-CGIL	Yes, both	The whole country
IT	FAI-CISL	Yes, both	The whole country
IT	UILA-UIL	Yes, both	The whole country
LT	LMP	Yes, single-employer	The whole country
LU	FCA LCGB	Information not provided	The whole country
LU	Alimentation et Hôtellerie, OGBL	Information not provided	The whole country
LV	LIA	No	The whole country
MT	GWU	Yes, single-employer	The whole country
NL	FNV	Yes, both	The whole

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	Trade union	Collective bargaining	Geographical coverage
			country
NL	CNV Vakmensen	Yes, both	The whole country
PL	KSPS NSZZ Solidarność	Yes, single-employer	The whole country
PT	SETAA	Yes, both	The whole country
RO	Federation SINDALIMENTA	Yes, both	The whole country
RO	Central CERES	Yes, single-employer	The whole country
SE	Unionen	Yes, multi-employer bargaining only	The whole country
SE	LIVSs	Yes, both	The whole country
SI	KŽI	Yes, multi-employer bargaining only	The whole country
SK	OZP SR	Yes, both	The whole country
UK	BFAWU	Yes, single-employer	The whole country
UK	GMB	Yes, single-employer	The whole country
UK	UNITE	Yes, single-employer	The whole country
UK	USDAW	Yes, both	The whole country

In all countries, except the Czech Republic and Estonia, at least one affiliation to EFFAT is found. EFFAT has 54 direct affiliations in 25 Member States, and 39 of them participate in sectoral collective bargaining. Moreover, all the unions affiliated to EFFAT cover the sector in all the regions of their countries except in the case of LBC-NVK (Belgium), and ELA-STV (Spain) that cover only some regions. Therefore, 56% of the unions listed in Tables 5 and 6 are directly affiliated to EFFAT. From the available data on sectoral membership of the trade unions, one can conclude that EFFAT covers the sector's most important labour representativeness. Cases of uncovered major trade unions can be found only in the Czech Republic (NOS PPP), Estonia (ETMK) Greece (Hellenic Federation of Milk, Food and Drinks Workers and Employees), Malta (UHM) and Sweden (LEDARNA, Sveriges Ingenjörer). Moreover, it is worth noting that in Poland and Portugal, most of the trade unions included are not affiliated to any European organisation.

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According to the information provided by the national correspondents, the following members of EFFAT are not related to the food and drink sector (see Table 14), and as such they do not have members in the sector. For this reason, they are not included in the scope of the study.

Table14: EFFAT affiliates without members in the food and drink sector

	Trade union
BE	CG-FGTB
BG	FNSZ/FITUA
CZ	OSPZV-ASO
FI	PARDIA
FI	PL
IT	Confedertia

Table 15 lists the members of FOODDRINKEUROPE. Again, this membership list is confined to the sector-related associations of the countries under consideration; hence, it does not include members of the European-level organisations that do not have any members in the food and drink sector.

Of the 24 countries under consideration that report any employer organisation, two countries (Bulgaria and Latvia) are not affiliated to FOODDRINKEUROPE. (The Latvian association LPUF ceased to be member of FOODDRINKEUROPE in 2011.) In total, FOODDRINKEUROPE has 24 direct affiliations in 22 Member States, 10 of which participate in sectoral collective bargaining. Accordingly, 21% of the employer organisations listed in Tables 7 and 9 are directly affiliated to FOODDRINKEUROPE. This figure implies that a considerable number of sector-related employer organisations across the EU are not affiliated to FOODDRINKEUROPE.

Table 15: FOODDRINKEUROPE sector-related membership (2011)

Country	Employer organisation	Collective bargaining	Geographical coverage
AT	FVNG	Yes, multiemployer	The whole country
BE	FEVIA	Yes, both	The whole country
CZ	PK ČR	No	The whole country
DE	BLL	No	The whole country
DE	BVE	No	The whole country
DK	DI	Yes, multiemployer	The whole country
EE	ETL	No	The whole country
EL	SEVT	Yes, multiemployer	The whole country
ES	FIAB	No	The whole country
FI	ETL	Yes, multiemployer	The whole country

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Country	Employer organisation	Collective bargaining	Geographical coverage
FR	ANIA	n.a.	The whole country
HU	ÉFOSZ	Yes, both	The whole country
IE	IBEC (by means of its association member FDII)	Yes, single-employer	The whole country
IT	Federalimentare	Yes, both	The whole country
LU	FEDIL	No	The whole country
NL	FNLI	No	The whole country
PL	PFPZ	No, but some member companies sign collective agreements at company level.	The whole country
PT	FIPA	n.a.	The whole country
RO	Federation ROMALIMENTA	Yes, both	The whole country
SE	Li	Yes, both	The whole country
SI	GZS - ZKŽP	Yes, multiemployer	The whole country
SK	SPPK	No	The whole country
SK	PKS	No	The whole country
UK	FDF	No	The whole country

Capacity to negotiate

The third criterion of representativeness at European level refers to the organisations' capacity to negotiate on behalf of their members. They have been asked whether they have the capacity to negotiate on behalf of their members. EFFAT and FOODDRINKEUROPE claim they have been given a permanent mandate by their members to negotiate on matters of European social dialogue.

As final proof of the weight of EFFAT and FOODDRINKEUROPE, it is useful to look at the other European organisations to which the sector-related trade unions and employer organisations are affiliated.

The affiliations of the trade unions are listed in Table 6. European organisations other than EFFAT represent a relatively low proportion of both sector-related trade unions and countries. There is only one European organisation mentioned here that covers at least three countries. This is the European organisation Uni-Europa, with eight affiliations covering seven countries. The presence of this organisation responds to the overlapping domains of many trade unions because Uni-Europa does not claim to attract unions of the food and drink sector. This overview underlines the principal status of EFFAT as the sector's labour representative.

An analogous review of the membership of the national employer/business associations can be derived from Table 6. Some of them have different European associations other than FOODDRINKEUROPE. There are only two European associations that cover at least three countries: the European Flour Millers, with three affiliations covering three countries, and COPA COGECA, with four affiliations in three countries. In conclusion,

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FOODDRINKEUROPE is by far the most important sector-related European organisation since it covers 22 countries.

Conclusions

A pluralistic association system prevails in the food and drink sector. This is shown by the high degree of fragmentation in labour and employers' representation observed in many countries. Thus, 48% of the countries with available data record four unions or more and 39% of the countries with available data record four or more employer associations. Differences between unions and employer associations appear with regard to their domain demarcation. In the case of the unions, overlap and sectional overlap prevail over sectionalism, while in the case of the employer associations, domain tends to be narrower. Accordingly, 57% of the employer associations have a sectionalism domain. Moreover, unionisation rates tend to be lower than densities of employers, especially with regard to the density of employees.

Collective bargaining coverage is highly polarised. While in nine of the 21 countries for which related data are available collective bargaining coverage is very high (80% or more), eight countries record low coverage rates (30% or less). In this respect, a pattern emerges. Among the EU15, the Scandinavian countries, Belgium, Austria and Spain show the highest rates, while in the new Member States, Slovenia and Romania show very high rates. On the other hand, Portugal, the UK and the majority of new Member States record low rates.

In all Member States, except the Czech Republic and Estonia, at least one affiliation to EFFAT is found. EFFAT has one union affiliated from the Czech Republic (OSPZV-ASO). However, this union is not related to the food and drink sector; it does not have members in the sector. EFFAT has 54 direct and sector-related affiliations in 25 Member States, and 39 of them participate in sectoral collective bargaining. Moreover, all the unions affiliated to EFFAT cover the sector in all the regions of their countries except in the case of LBC-NVK (Belgium), and ELA-STV (Spain), which cover only some regions.

As seen from the bottom-up mapping of individual organisations, there are many sector-related employer organisations across the EU that are not affiliated to FOODDRINKEUROPE. However, the mapping also showed that they are not covered by any other European-level organisation. Moreover, it is worth noting that FOODDRINKEUROPE covers 22 countries out of 24 reporting any sector-related employer organisation. For the employees, cases of uncovered major employee organisations can be found in only five Member States. No other European-level actors with a comparable coverage could be found on either side of the industry.

According to the the European Commission communication on adapting and promoting social dialogue at Community level (2.8Mb PDF), organisations that are eligible to be consulted shall fulfil the following criteria:

- relate to specific sectors or categories and be organised at European level;
- consist of organisations that are themselves an integral and recognised part of Member States' social partner structures and have the capacity to negotiate agreements, and that are representative of several Member States;
- have adequate structures to ensure their effective participation in the work of the Committees.

In light of the present study, both European social partners under consideration, EFFAT and FOODDRINKEUROPE, fulfil the above criteria.

Top-down and bottom-up analyses of the food and drink sector in the EU27 show that EFFAT (on the employees' side) and FOODDRINKEUROPE (on the employers' side) ought to be regarded as the most important EU-wide representatives of the employers and employees within the sector.

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Annex: Organisation names and their abbreviations

Table 16 : Employee organisation names and their abbreviations

	Abbreviation	Full association name
AT	GPA-djp	Union of Salaried Employees, Graphical Workers and Journalists
AT	PRO-GE	Manufacturing Union
BE	ABVV-FGTB HORVAL	Central Food Catering Services
BE	ABVV-BBTK/FGTB-SETCA	Union for employees, technicians and staff members
BE	ACV Voeding en diensten – CSC Alimentation et Services	General Christian Trade Union Food and Drink
BE	LBC-NVK	National confederation for employees
BE	CNE-CSC	National confederation for employees
BE	ACLVB – CGSLB	Liberal Trade Union
BG	FITU-Food	Federation of Independent Trade Union Organisations in the Food Industry
BG	NFFI Podkrepa	National Federation Food Industry PODKREPA
BG	TUB	The Trade Union of Brewers, food and beverages
CY	OVIEK	Federation of Industrial Workers
CY	SEGDAMELIN	Cyprus Agricultural, Forestry, Transport, Port, Seamen and Allied Occupations Trade Union
CY	SEVETTYK	Cyprus Union of Workers Industry, Trade, Press and Printing and General Services
CZ	NOS PPP	Independent Trade Union of Employees in Food Industry and Related Sectors of Bohemia and Moravia
DE	NGG	Trade Union of Food, Beverages, Tobacco, Hotel and Catering and Allied Workers
DK	NNF	The Danish Food and Allied Workers' Union

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	Abbreviation	Full association name
DK	HK/Handel	The Union of Commercial and Clerical Employees in Denmark
DK	CO-industri	The Central Organisation of Industrial Workers in Denmark
DK	DMF	Union of Danos Dirimen
DK	3F	United Federation of Danish Workers
DK	HK/Privat	The Union of Commercial and Clerical Employees in Denmark/Private
DK	Metal	Danos metalworkers Union
DK	DEF	Danish Union of Electricians
EE	ETMK	Confederation of Estonian Food and Landworkers' Unions
ES	FEAGRA-CCOO	Federation of Agro Food of the Trade Union Confederation of Workers' Commissions
ES	FITAG-UGT	Federation of Industry and Farmer Workers of the General Workers' Unions
ES	ELA-STV	Services Federation of Basque Workers' Solidarity
ES	CIG	Federation of Galician Interunion Confederation
FI	SEL	The Finnish Food Workers' Union SEL
FI	Pro	n.a.
FI	YTN	Federation of Professional and Managerial Staff (YTN)
FI	MVL	Professional Dairy Association MVL
FR	CFE-CGC Agro	Agrofood federation of the French Confederation of Professional and Managerial Staff – General Confederation of Professional and Managerial Staff
FR	FGA-CFDT	General agrofood Federation - French Democratic Federation of Labour
FR	FNAF-CGT	National agrofood federation - General Confederation of Labour
FR	FGTA-FO	General federation of workers of farming, agrofood, food, tobacco and other services - Force ouvrière
FR	CFTC AGRI	Federation CFTC of Agriculture
GR	-	Hellenic Federation of Milk, Food and Drinks Workers and Employees

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	Abbreviation	Full association name
GR	POEK	Hellenic Federation of Manual and Clerical Staff of the Meat Industry
GR	POMYM	Hellenic Federation of Mill Workers and Pasta Makers
GR	POEEYTE	Hellenic Federation of Food and Hotel Employees
GR	OEXBE	Federation of Chemical Industry Workers of Greece
HU	ÉDOSZ	Hungarian Federation of Food Workers' Trade Unions
HU	HDSZ	Trade Union of Meat Processing Industry Employees
HU	MEDOSZ	Agricultural, Forestry and Water Management Workers' Trade Union
HU	ÉDSZ	Trade Union of Food Workers
HU	BDSZ	Poultry Workers' Union
HU	GMDSZ	Grain and Mill Workers' Union
HU	HIDSZ	Frozen Food Workers' Union
IE	SIPTU	Services, Industrial, Professional and Technical Union
IE	UNITE	UNITE
IE	TEEU	Technical, Engineering and Electrical Union
IE	UCATT	Union of Construction Allied Trades and Technicians
IE	GSU	Guinness Staff Union
IE	IDSA	Irish Distillers Staff Association
IT	FLAI-CGIL	Italian Federation of Agroindustry Workers
IT	FAI-CISL	Italian Federation of Agriculture, Food and the Environment
IT	UILA-UIL	Union of Italian Workers in Agroindustry
IT	UGL-Agroalimentare	General Union of Labour-Agrofood sector
IT	UGL-Terziario	General Union of Labour-Tertiary
LT	LMP	Lithuanian Trade Union of Food Producers
LU	FCA LCGB	Federation Commerce and Food, LCGB
LU	Alimentation et Hôtellerie, OGBL	Food and Hotels, OGBL

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	Abbreviation	Full association name
LV	LIA	Latvian Industrial Workers Trade Union
LV	LLPNAB	Latvian Agriculture and food branch Trade Union
MT	UHM	Union of United Workers
MT	GWU	General Workers' Union
NL	FNV	Dutch Trade union Federations
NL	CNV Vakmensen	Christian National Central Union Craftsmen
NL	De Unie	The Union
PL	KSPS NSZZ Solidarność	Food Worker's Secretariat NSZZ Solidarność
PL	ZZPPiS	Meat and Food Workers Trade Union in Poland
PL	FZZPM	Trade Unions Federation of Dairying Workers in Poland
PL	ZZPPC	Trade Union of Confectionery Industry Workers
PL	FZZPPS	Trade Unions Federation of Food Industry Workers
PL	FZZPPC	Trade Union Federation of Sugar Industry Workers
PT	SINTAB	Sindicato dos Trabalhadores da Agricultura e das Indústrias de Alimentação do Sul e Tabacos de Portugal
PT	STIANOR	Union of Workers in Food Industries in Northern Portugal
PT	STIAC	Union of Workers in Food Industries in Central and Southern Portugal and Islands
PT	SINDILACTI	Union of Professionals in Milk Industries, Food, Agriculture, Offices, Commerce, Services, Road Transports, Metal, Construction and Wood
PT	SINTICABA	National Union of Workers in Beverage Commerce and Manufacturing
PT	SETAA	Union of Agriculture, Food and Forests
PT	SITESE	Sindicato dos Trabalhadores de Escritório, Comércio, Hotelaria e Serviços
RO	Federation SINDALIMENTA	National Trade Unions Federation from Food, Drink, Tobacco and Related Branches SINDALIMENTA

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	Abbreviation	Full association name
RO	Central CERES	Central of Trade Unions of Agriculture, Food Industry, Tourism and Related Branches Workers CERES
SE	Ledarna	Association of Management and Professional Staff
SE	Unionen	Unionen
SE	Livs	The Swedish Food Workers Union
SE	Sveriges Ingenjörer	The Swedish Association of Graduate Engineers
SI	KŽI	The Trade Union of Agriculture and Food Industry of Slovenia
SI	OZP SR	Trade Union Association of Food Workers
UK	BFAWU	Bakers, Food and Allied Workers' Union
UK	GMB	GMB
UK	UNITE	Unite The Union
UK	USDAW	Union of Shop, Distributive and Allied Workers

Table 17: Employer organisation names and their abbreviations

Country	Abbreviation	Full association name
AT	FVNG	Federal Association of the Food and Beverages Industries
AT	BILG	Federal Association of Food Trades
BE	FEVIA	Federation for food industry
BG	USSPMB	Union of the Sugar and Sugar Products Manufacturers in Bulgaria
BG	OOPAB	Oilseed Oil Producers Association in Bulgaria
BG	UMCF	Union of Manufacturers of Compound Feed
BG	UPBB	Union of Poultry Breeders in Bulgaria
BG	UBM	Union of Bulgarian Millers (UBM)

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Country	Abbreviation	Full association name
BG	UBB	Union of Brewers in Bulgaria (UBB)
CZ	PK ČR	Federation of the Food and Drink Industries of the Czech Republic
DE	BLL	German Federation for Food Law and Food Science
DE	BVE	Federation of German Food and Drink Industries
DE	ANG	Employers' association for the food industry
DE	BDSI	Association of the German Confectionary Industry
DE	VdZ	Association of the sugar industry
DE	n.a.	Association of German Industrial Bakers
DE	n.a.	German Bakers Confederation
DE	DFV	German Butchers' Association
DK	DI	Confederation of Danish Industry
DK	MA	The Danish Dairy Employers' Association
DK	BKD	Baker and Confectioner Masters in Denmark
DK	DSM	Danish Butchers
EE	ETL	Association of Estonian Food Industry
ES	FIAB	Spanish Federation of Food and Drink Industry
ES	AMACO	National Association of Slaughterhouse of Fowls and Rabbits
ES	CONFECARNE	Spanish Confederation of Meat
ES	FNACV	National Federation of Tinned vegetables
ES	AFHSE	Spanish Association of Flour and Semolina Manufactures
ES	AEFH	National Association of Ice Cream Manufactures
ES	ANIE	National Association of See Products Manufactures

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Country	Abbreviation	Full association name
ES	CESFACB	Spanish Confederation of Prepared Animal Feeds Manufactures
ES	FENIL	National Federation of Dairy Products Manufactures
ES	TUMA	National Association of Nougat Candy and Marzipan Manufactures
ES	FEICOPESCA	Spanish Federation of Transformation and Commercialisation of Fish and Aquiculture Products Industries
ES	ASEPRHU	Spanish Association of Eggs Manufactures
ES	ANEABE	National Association of Bottled Water Enterprises
ES	UNIADE	Association of Spanish Rice Millers
ES	AEFPA	Spanish Association of Pasta Manufactures
FI	ETL	Finnish Food and Drink Industries Federation
FR	ANIA	National Association of Food Industries
FR	ADEPALE	Association of producers of processed food
FR	USIPA	Union of producers of starch products, and starch derivatives
FR	FEDAROM	Federation of producers of flavourings
FR	SNBR	National association of companies producing refreshing drinks
FR	FEBPF	Federation of French bakeries
FR	ABF	Association of French Brewers
FR	FICT	Federation of French Butchers
FR	FNICG	National Federation of fat producing companies
FR	CSEM	Chamber of mineral water companies

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Country	Abbreviation	Full association name
FR	FEDALIM	Association of organisations in the food industry
FR	SFIG	Union of manufacturers of industrial ice, sorbets and ice creams
FR	UNIJUS	Professional association for the producers of fruit juice
FR	FNIL	National Federation for the Dairy Industry
FR	FNCL	National Federation for the Dairy Industry
FR	Alliance 7	Alliance 7
FR	CSFL	Union of French yeast producers
FR	ANMF	National Association of French Mills
FR	CSF	Committee of French Salt Producers
FR	FFS	French Federation of Spirit Producers
FR	SNSF	National Union of French Sugar Manufacturers
FR	-	Chamber of French Refiners and Conditioners of Sugar
FR	-	National Union of Manufacturers of Frozen and Deep Frozen Products
FR	SYFAB	National Union of Manufacturers of Ingredients for Bakery, Pastry and Biscuits
FR	SNIV-SNCP	French Meat Companies
FR	FICGV	Federation of Industrial and Commercial Meat Traders
FR	FIA	Federation for the Poultry Industry
GR	GSEVEE	Hellenic Confederation of Professionals, Craftsmen and Merchants (GSEVEE)
GR	SEV	Hellenic Federation of Enterprises (SEV)
GR	SEVT	Hellenic Federation of Food Industries (SEVT)

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Country	Abbreviation	Full association name
HU	ÉFOSZ	Federation of Hungarian Food Industries
HU	MPSZ	Hungarian Baker Association
IE	IBEC	Irish Business and Employers Confederation
IT	Federalimentare	Italian Federation of the Food Industry
IT	AGCI-Agrital	General Association of Italian Cooperatives-AGRITAL
IT	Legacoop Agroalimentare	National Association of Cooperatives- Agroindustry
IT	Federagri-Confcooperative	National Federation of Agricultural and Agroindustrial Cooperatives
IT	Unionalimentari-Confapi	Italian Confederation of Small and Medium-sized Industries of the Agroindustry sector
IT	CNA Alimentare	National Confederation of Artisans and Small and Medium Enterprises of the Agroindustrial Sector
IT	Confartigianato Alimentazione	Confartigianato-Agroindustry
IT	CASARTIGIANI	Confederation of Autonomous Artisan Trade Unions
IT	CLAAI	Confederation of Free Italian Artisan Associations
IT	FIPPA	Italian Federation of Bakers, Confectioners and related industries
IT	Assopanificatori	National Association of Bakers
LU	FEDIL	FEDIL - Federation of the Luxembourg Food Industry
LV	LPUF	The Latvian Federation of Food Enterprises
LV	LADRIA	Association of Latvian Spirits Producers and Distributors
LV	LZS (ULFPI)	Union of Latvian Fish Processing Industry
LV	LGRPA	Latvian association of producers and processors of meat

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Country	Abbreviation	Full association name
LV	LADS	The Breweries' association of Latvia
LV	LADA	The Breweries' association of Latvia
LV	LBDUA	Latvian Soft Drinks Manufacturers Association
LV	LMB	Latvian Bakers Association
NL	FNLI	Federation of Dutch Grocery Industry
PL	PFPZ	Polish Federation of Food Industry Union of Employers
PL	ZPPP	Union of the Brewing Industry Employers in Poland
PT	FIPA	Federation of Portuguese Agro-Food Industries
PT	AIPAN	Association of Baking, Pastry and Similar Industries of the Northern Portugal
PT	ACIP	Association of Commerce and Manufacturing in Bakeries, Pastry and Similar Industries
PT	APIC	Portuguese Association of Manufacturers of Meat Products
PT	ANIL	National Association of Manufacturers of Milk Products
PT	ANICP	National Association of Canned Fish Manufacturers
PT	ANCAVE	National Association of Slaughter Houses and Manufacturing of Poultry Meat
PT	AIPL	Association of Bakery Industries of Lisbon
PT	APIAM	Portuguese Association of Mineral and Spring Water Producers
RO	Federation ROMALIMENTA	Romanian Employer Federation from Food Industry ROMALIMENTA
SE	Li	The Swedish Food Federation

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Country	Abbreviation	Full association name
SI	GZS - ZKŽP	Chamber of Commerce - Chamber of Agricultural and Food Enterprises
SI	ZDS	Association of Employers of Slovenia
SI	ZZS	Cooperative Union of Slovenia
SI	SPPK	Slovak Agriculture and Food Chamber
SK	PKS	Food Chamber of Slovakia
SK	SCS	The Slovak Association of Sugar Producers
SK	SZVPS	Slovak Beer and Malt Association
UK	FDF	Food and Drink Federation
UK	SAMB	Scottish Association of Master Bakers

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