Representativeness of the European social partner organisations: Sugar manufacturing sector

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This study provides information designed to encourage sectoral social dialogue in the sugar manufacturing sector. The aim of Eurofound's series of representativeness studies is to identify the relevant national and supranational social partner organisations in the field of industrial relations in selected sectors. Top-down and bottom-up analyses of the sugar manufacturing sector in the EU28 covered in the study show that the European Federation of Food, Agriculture and Tourism (EFFAT), on the employees' side, and the European Association of Sugar Manufacturers (CEFS), on the employers' side, are the most important European-level social partner organisations in the sector and, also, the only social partners in the European Sectoral Social Dialogue Committee for the sugar sector.

Introduction

Objectives of the study

The aim of this representativeness study is to identify the relevant national and supranational social partner organisations – the trade unions and employer associations – in the sugar manufacturing sector, and to show how these actors relate to the sector's European interest associations of labour and business. The impetus for this study arises from the aim of the European Commission to identify the representative social partner associations consulted under the provisions of the Treaty on the Functioning of the European Union (TFEU). Hence, this study seeks to provide basic information needed to support sectoral social dialogue. The effectiveness of 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 associations that meet this precondition will be admitted to European social dialogue.

Definition and methodology

In order to implement these key aims, the study first identifies the relevant national social partner organisations in the sugar manufacturing sector, by means of both a top-down approach (listing the members of the European affiliations) and a bottom-up approach (through Eurofound's Network of European correspondents). This involves a clarification of 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'.

A European association is considered a relevant sector-related interest association if:

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

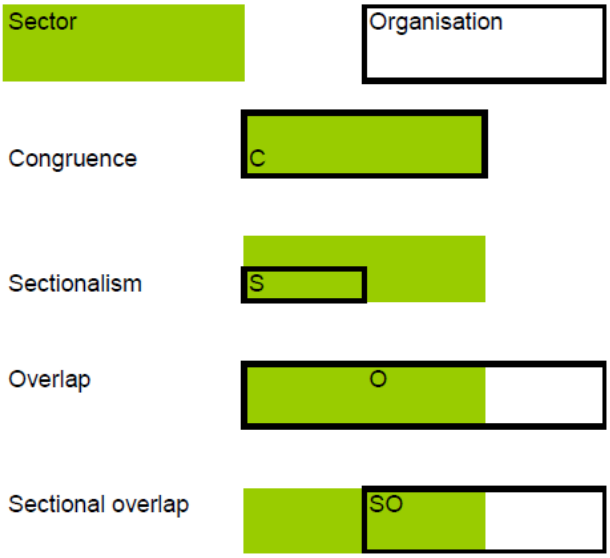
A national association is considered a relevant sector-related interest association if it meets both criteria A and B:

- A. the association's domain relates to the sector;
- B. the association is either regularly involved in sector-related collective bargaining, and/or affiliated to any relevant European interest association.

Social partner organisations are considered 'sector-related' if their membership domain relates to the sector in one of the ways displayed in **Error! Reference source not found.**. The domains of the trade unions and employer associations, as well as the purview of collective agreements, are unlikely to be strictly congruent with category 10.81 (manufacture of sugar products) of the Statistical Classification of Economic Activities in the European Community (NACE). Hence, all trade unions, employer associations and collective agreements are included that are 'sector-related'. Being sector-related in the strict sense of NACE 10.81 applies to the following four patterns.

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

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



Source: Eurofound

As regards the second part of criterion B (affiliation to European-level interest association), it must be said that the affiliation to a European social partner organisation does not necessarily imply that the national 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 country. 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.

European Sectoral Social Dialogue Committee

European social dialogue refers to discussions, consultations, negotiations and joint actions involving organisations representing the two sides of industry (employers and workers). Under Article 154 of the TFEU, sectoral social dialogue committees at the European level provide for the autonomous work of social partners and a mechanism for the European Commission to consult 'management and labour' on developments and initiatives having social implications for the sector. The effectiveness of the European social dialogue depends on whether its participants are sufficiently representative in terms of the sector's national actors across the Member States. Only European associations that meet this precondition will be admitted to European social dialogue.

As for the sector-related European associations, the European Federation of Food, Agriculture and Tourism (EFFAT), on the employees' side, and the European Association of Sugar Manufacturers (CEFS), on the employers' side, are the two relevant organisations and, also, the only partners in the European Sectoral Social Dialogue Committee for the sugar sector.

Sectoral properties

Sector-relatedness (criterion A) is defined in terms of NACE to ensure the cross-national comparability of the findings. Accordingly, as mentioned, the sugar manufacturing sector falls under the NACE (Rev. 2) Division 10.81. This includes the following activities:

- manufacture or refining of sugar (sucrose) and sugar substitutes from the juice of cane, beet, maple and palm;
- manufacture of sugar syrups;
- manufacture of molasses;
- production of maple syrup and sugar.

This class excludes the manufacture of glucose, glucose syrup and maltose falling under NACE 10.62.

Based on this NACE-based definition of the sector, the organisations listed by the European Commission as social partner organisations, consulted under Article 154 of the TFEU, are EFFAT and CEFS.

It therefore was agreed that this study should apply a combined approach of analysing the relevant interest representation organisations, consisting of:

- a top-down screening, starting with the reference to the sector-related European interest associations and looking at the affiliations of national associations to them;
- a bottom-up screening, starting with the reference to the national organisations involved in sector-related collective bargaining and the collection of data on their affiliation to any European organisation.

Collection of data

For this study, data have been collected from 22 Member States; Cyprus, Estonia, Ireland, Luxembourg, Malta and Slovenia were excluded from the study as there are no activities relevant to the manufacturing of sugar in these countries . Although Latvia was initially included in the study, it was discovered that it no longer manufactures sugar. Thus, no data are presented for Latvia either.

The collection of quantitative data is essential for investigating the representativeness of the social partner organisations. Unless cited otherwise, this study draws on country studies provided by Eurofound’s Network of European correspondents. These studies are based on a standard questionnaire, which the correspondents completed by contacting the sector-related social partner organisations in their countries.[1]

Initial contact was generally made via a telephone interview, but might also have been established via email. In case of any representative being unavailable, the national correspondents were 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 correspondents were asked 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 is indicated in the report.

In principle, quantitative data can 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 regarding the potential membership of the organisation;
- personal estimates made by representatives of the respective organisations.

[1] The national contributions of this representativeness study are available from Eurofound on request.

Quality assurance

In order to ensure the quality of the information gathered, a number of verification procedures and feedback loops are expected in the Eurofound representativeness studies.

1. First, the external expert entrusted with the production of the representativeness study, in collaboration with Eurofound, checks the consistency of the national contributions.
2. Second, Eurofound sends the national contributions to both the national members of the Agency’s 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 received from the sector-related organisations is then taken into account, if it is in line with the methodology of the study.
3. Finally, the complete study is evaluated by the European-level sector-related social partners and the Eurofound Advisory Committee on Industrial Relations, which consists of representatives from both sides of industry, governments and the European Commission.

Employment and economic trends

Economic characteristics and trends

Global sugar consumption has increased during the last six years, and is expected to keep rising, reaching 174 million tonnes (raw value) in 2016–2017. Consumption exceeded production in 2015–2016 for the first time since 2009–2010. The European Union is the second largest consumer of sugar in the world. According to a 2016 report, Sugar: World markets and trade (PDF) by the US Department of Agriculture (USDA), sugar consumption in the EU in 2015–2016 accounted for about 11% of consumption worldwide.

After a decrease to 165 million tonnes (raw value) in 2015–2016, global production is expected to increase again in 2016–2017 to 169 million tonnes due to production increases in Brazil and the EU (compensating for the decline of sugar production in India). According to the USDA report, in 2015–2016, sugar producers in the EU contributed about 8.5% (14 million tonnes) to global production.

Sugar is produced in 21 EU Member States. There is no sugar production in Cyprus, Estonia, Ireland, Luxembourg, Malta and Slovenia. Latvia stopped producing sugar in 2007.

The European sugar market mainly produces beet sugar as well as a small amount of cane sugar. According to the European Sugar Refineries Association (ESRA), beet sugar accounts for about 80%–85% of the supply in Europe, while cane sugar production covers 15%–20%. According to a report, CEFS sugar statistics 2015, and a 2016 article on the EU sugar market by the European Commission's Directorate-General for Agriculture and Rural Development, there are cane sugar refineries in Bulgaria, Finland, France (and the French overseas departments), Italy, Portugal, Romania, Sweden, and the UK. In addition, there are combined beet and cane sugar refineries in Croatia and Spain.

Sugar from sugar beet was produced in 19 Member States in 2014–2015. No production from beet was indicated for Bulgaria and Portugal in 2014–2015. Table 1 gives an overview of production.

Table 1: Total sugar production from sugar beet (tonnes)

Country	2007–2008	Share of total 2007–2008	2014–2015	Share of total 2014–2015	Variation 2007–2008 to 2014–2015
FR	4,445,299	26.72%	4,576,512	24.42%	2.95%
DE	3,905,768	23.48%	4,491,076	23.96%	14.99%
PL	1,919,481	11.54%	2,041,224	10.89%	6.34%
UK	1,049,244	6.31%	1,446,549	7.72%	37.87%
NL	888,808	5.34%	1,144,121	6.10%	28.73%
BE	875,021	5.26%	815,695	4.35%	-6.78%
IT	670,327	4.03%	676,652	3.61%	0.94%
CZ	353,902	2.13%	596,415	3.18%	68.53%
ES	711,000	4.27%	578,146	3.08%	-18.69%
DK	380,000	2.28%	476,000	2.54%	25.26%
AT	365,404	2.20%	403,247	2.15%	10.36%
SE	354,000	2.13%	382,000	2.04%	7.91%
RO	80,339	0.48%	218,983	1.17%	172.57%
SK	125,935	0.76%	213,266	1.14%	69.35%
EL	78,388	0.47%	195,032	1.04%	148.80%
LT	98,000	0.59%	182,284	0.97%	86.00%
FI	101,000	0.61%	138,228	0.74%	36.86%
HU	220,856	1.33%	129,889	0.69%	-41.19%
HR	234,550	*Data for 2010/11*	35,989	0.19%	-84.66%
PT	14,154	0.09%	0	0.00%	-100.00%
TOTAL	**16,636,926**		**18,741,308**		**+12.65%**

Notes: Countries are ranked countries by production volume in 2014–2015.

Source: CEFS Statistics 2015

In 2014–2015, the largest beet sugar producer in the EU was France, followed by Germany, Poland and the UK. Two-thirds of European beet sugar is produced in four Member States: France, Germany, Poland and the UK. Another group of five Member States (Belgium, the Czech Republic, Italy, the Netherlands and Spain) produces another 20% of European beet sugar. The rest (about 12%) is produced in 10 other Member States.

A major influence on the market development in the EU is the Common Agricultural Policy (CAP). A reform of the quota system in 2006 led to important changes in the market structure that resulted in a wave of significant restructuring and the closure of almost half of all sugar factories in the EU. Between 2005 and 2006, according to the German Economic Association of Sugar (WVZ), 44% of all European sugar factories were closed (PDF). Closures particularly affected factories with medium or low production capacities.

However, cane sugar refineries benefited from the reform since it lowered restrictions on raw sugar imports. As detailed in a 2011 report by Agrosynergie (PDF), the number of full-time refineries increased from 7 to 11 and Member States that did not have refineries before the reform (such as Italy and Spain) entered the market.

The sector will face further change in 2017. The adoption of a further reform of the CAP, in 2013, confirmed the abolition of the sugar quota system from October 2017 (PDF). This change establishes a new regulation for the common organisation of the markets in agricultural products and repeals, among other items, Council Regulation (EC) No 1234/2007 on specific provisions for certain agricultural products. It puts an end to the current Single Common Market Organisation and provides that 'the present system of sugar quotas should be extended until it is abolished at the end of the 2016–2017 marketing year'.

This liberalisation of the sugar market in the EU will affect competition and sugar production (see, for example, the 2016 report (PDF) by the European Commission's Directorate-General for Internal Policies) and, consequently, companies and employees in the sector. As the abolition of quotas will take place three years earlier than originally proposed by the European Parliament, social partners expect the adaptation to a new market environment will be even more difficult. In October 2015, CEFS and EFFAT adopted a joint demand for the establishment of a fund (PDF) to support sugar operators, calling on EU institutions to tackle the consequences of the new reform.

Table 2 illustrates the change in the number of companies in the sugar manufacturing sector between 2008 and 2013, based on information provided by CEFS in 2016. Further data have been gathered by Eurofound's Network of European correspondents for this study. These data are mainly based on national statistics and can be found in Table A17 in the Annex.

Table 2: Number of sugar manufacturing companies in 2008 and 2013 according to CEFS

Country	Number of sugar manufacturing companies		
	Number of companies		Change
	2007–2008	2014–2015	
AT	1	1	0%
BE	2	2	0%
BG	7	6	-14%
CZ	5	5	0%
DE	6	5	-17%
DK	1	1	0%
EL	1	1	0%
ES	2	2	0%
FI	1	1	0%
FR	9	8	-11%
HR	5	5	0%
HU	2	1	-50%
IT	5	4	-20%
LT	2	2	0%
LV	0	0	N/A
NL	2	1	-50%
PL	5	5	0%
PT	3	4	33%
RO	6	6	0%
SE	2	1	-50%
SK	2	2	0%
UK	2	2	0%

Note: Eurofound's Network of European correspondents has, for some countries, collected statistical data with different numbers of companies falling within the NACE code (10.81) scope of the sector. As there is no explanation for the differences, the other statistical data is included in Table A17 in the Annex, with a disclaimer stating that they should be used with caution.

Source: CEFS, 2016

Some multinational companies in the sugar manufacturing sector are represented in different Member States. This is, for example, the case for the sugar, starch and fruit manufacturer AGRANA in Austria, Hungary and Slovakia, and Nordic Sugar in Denmark, Finland, Lithuania, Slovakia and Sweden. AGRANA itself is part of the German company Südzucker, which also owns the Belgian company Raffinerie Tirlemontoise (Südzucker). Nordic Sugar belongs to the German Nordzucker Group.

As highlighted above, the most dramatic change in the sugar manufacturing sector took place in Latvia with the shutdown of total production capacity. In 2007, the owners of the two remaining

Latvian sugar factories agreed on full-scale restructuring, deciding to close the factories and dismantle their equipment. Compensation for the factory owners and their workers, as well as farmers, was provided. Restructuring was completed at the end of 2010. Consequently, Latvia is not included in the further analysis of this study, reducing the total of relevant Member States to 21.

A declining number of companies/enterprises can also be observed in Bulgaria, France, Germany, Hungary, Italy, the Netherlands and Sweden due to concentration and closures.

No change in the number of sugar manufacturing companies was reported in Austria, Belgium, Croatia, the Czech Republic, Denmark, Finland, Greece, Lithuania, Poland, Romania, Slovakia, Spain or the UK. Nevertheless, Eurofound's Network of European correspondents stated that, in these countries, the economic outlook for the sector as well as assessments of competitiveness are not very optimistic – again due to the scheduled end of Europe's sugar quota system in 2017.

An increase in the number of companies or enterprises is reported only in Portugal. However, here, the sugar industry has languished during the past few decades and the fall in employment in the sector was lower than the total loss of employment in the total private sector.

In Greece, the number of sugar manufacturing companies (one) has remained stable. However, the sector in Greece has faced enormous economic problems and seen a sharp fall in production in recent years due, in part, to the rising energy costs of the plants and the fall in the commodity price of sugar beet.

The influence of politics on the sector will remain strong or even increase further with the 2017 abolition of sugar quotas. A further deregulation of the EU sugar market is likely to lead to additional challenges, stronger competition and further restructuring of the sector, which will threaten jobs (see also CEFS, 2015).

Employment trends at European level

According to the latest available figures, Eurostat data show that there were 28,000 employees in the sugar manufacturing sector in the EU 28 in 2013. Since 2008, the sector has lost around one-third of its total workforce.[2]

As can be seen in Table 3, there were 37,100 employees in the sugar sector in the EU27 in 2008, with the number decreasing by 21% to 29,400 in 2011. Between 2011 and 2013, the number of employees in the sector in the EU28 decreased again by 8%. The negative influence on the number of employees in the EU due to accelerated factory closure as a cause of the CAP reform is clearly noticeable.

[2] CEFS refers to higher employment figures during the 2012–2013 and 2013–2014 sugar campaign. According to CEFS' statistics for 2015, some 30,612 people were employed in sugar manufacturing in the EU in 2012–2013 and 30,598 in 2013–2014.

Table 3: Number of employees in the EU27/28 in the sugar manufacturing sector, 2008–2013

Year	Coverage	Number of employees
2008	EU27	37,100
2009	EU27	33,100
2010	EU27	31,000
2012	EU27 EU28	29,400 30,300
2013	EU28	30,800

Note: According to CEFS' statistics for in 2015, employment figures for the campaign 2012–2013 and 2013–2014 are higher, reaching 30,612 in 2012–2013 and 30,598 during 2013–2014.

Source: Eurostat, Structural Business Statistics data, NACE (Rev. 2) Division 10.81 for 2008 until 2012.

Employment at national level

Table 4 gives an overview of employment for 10 EU Member States with the largest workforces in the sugar sector in 2014–2015, based on data provided by CEFS.

As the method of gathering data on employment in the sugar sector differs between countries, any comparative review faces several uncertainties, for example on the absolute number of employees or on structural characteristics.

Table 4: Employment in 2014–2015 in the sugar sector in EU Member States with the largest workforce

Country	Employment in 2014–2015 beet processing campaign
FR	6,682
DE	5,266
PL	5,065
ES	1,722
CZ	1,423
UK	1,122*
IT	1,100*
AT	828
NL	792
BE	664

Notes: Presented in decreasing number of employees.

Data are not available for Bulgaria, Latvia, Portugal or Romania.

** Excluding refineries.*

Source: CEFS statistics, 2016

In terms of the share in total employment in the country, the sugar sector is relatively small with shares ranging in the EU Member States with available data from below 0.0001% to 0.2%; the share is calculated based on figures for those in dependent employment, temporary agency workers and self-employed. The share of women is relatively low and ranges from about 11% to almost 24%.

National level of interest representation

Membership domain and strength

This study has collected quantitative data on membership and organisational strength/density through Eurofound's Network of European correspondents about the indicators listed in Table 5.

Table 5: Definition of membership and organisational strength/density

	Membership	Organisational strength/density
Trade unions	• Number of active members in employment • Number of active members in employment in the sector	• Sectoral density: Number of active members in employment in the sector divided by total number of employees in the sector
Employer organisations	• Number of member companies • Number of employees working in member companies • Number of member companies in the sector • Number of employees working in member companies in the sector	• Sectoral density (companies): Number of member companies in the sector divided by the total number of companies in the sector* • Sectoral density (employees): Number of employees working in member companies in the sector divided by total number of employees in the sector

*Note: * Reliable figures on sectoral density, in terms of companies, cannot be calculated, since data on the number of companies provided in this context are not comparable with the indications of employer organisations on the number of member companies in the sector.*

In the following sections data on trade unions and employer organisations is presented on domain patterns, membership and organisational strength, collective bargaining and participation in public policy.

Measuring representativeness

In most EU Member States, there are statutory regulations on the representativeness of social partner organisations. These become important when assigning certain rights, such as interest representation, collective bargaining or in the context of public policymaking and social dialogue. Representativeness is normally measured by the membership strength of the organisations.

For a sectoral study such as this, measures of the membership strength of trade unions and employer organisations also have to take into account how the membership domains relate to the sector. Furthermore, the representativeness of the national social partner organisations is important also for the European umbrella organisations to participate in European Sectoral Social Dialogue. Therefore, and apart from organisational strength, the role of the national actors in collective bargaining and public policymaking are two further important aspects of representativeness. This is based on research evidence that the effectiveness of European social dialogue tends to increase with the growing ability of the national affiliates of the European organisations to regulate employment and to influence national public policies affecting the sector.

Thus, representativeness is a multidimensional concept that involves three basic elements:

- the membership domain of social partner organisations and membership strength, measured by organisational density;
- the role of social partner organisations in collective bargaining;

- their role in public policymaking.

As in other Eurofound representativeness studies, the following analysis of national-level interest representation in the sugar sector therefore focuses on these three aspects.

Domain patterns

Trade unions

Detailed data and information on employee organisations, membership domains, strength and affiliation to European-level trade unions are presented in Tables A1, A2 and A3 in the Annex.

Eurofound's Network of European correspondents identified 47 sector-related trade union organisations covering all 21 Member States involved in sugar production. The names and abbreviations of these trade unions are presented in Table A13 in the Annex.

There are nine EU Member States where only one sector-related trade union is recorded. Two unions exist in five countries, three unions in three countries and four in one country, while three countries record five trade unions (Table 6). Hence, a more or less pluralistic structure exists in 57% of the 21 Member States with sector-related trade unions (12 out of 21).

Table 6: Number of sector-related trade union organisations in EU Member States

	EU Member States
EU Member States with one sector-related trade unions (9)	CZ, DE, DK, EL, HR, HU, LT, RO, SK
EU Member States with two sector-related trade unions (5)	AT, BG, ES, PL, UK
EU Member States with three sector-related trade unions (3)	IT, NL, PT
EU Member States with four sector-related trade unions (1)	FI
EU Member States with five sector-related trade unions (3)	BE, FR, SE

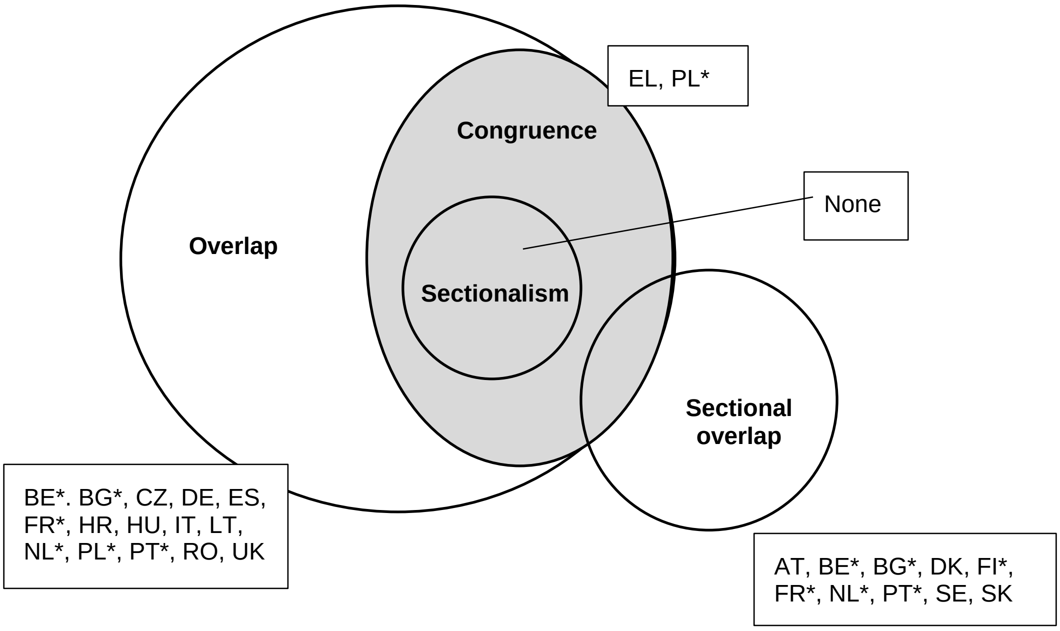
Notes: For details see Table A1 in the Annex.

Source: Eurofound's Network of European correspondents, 2016

Regarding involvement in collective bargaining, only one of the 47 trade unions – the Union of Agriculture, Food and Forests (SETAA) in Portugal – is not involved.

This study shows that the two main domain patterns are overlap and sectional overlap. Overall, quite a pluralistic picture emerges, with several Member States following a mix of domain patterns, as shown in Figure 2. For a detailed overview of trade union domains, see Table A1 in the Annex.

Figure 2: Domain coverage of trade unions in the sector



*Notes: * Different domain patterns exist in the country.*

For details, see Table A1 in the Annex.

Source: Eurofound's Network of European correspondents, 2016

Only two trade unions (OEBZ in Greece and FZZPPC in Poland) demarcate their domain in a way that is congruent with the sugar sector as defined for this study.

For 51% of the unions in the sugar sector, the most frequent domain pattern is overlap (24 out 47 trade unions). Overlap occurs in Member States where general unions are the most important pattern of union organisation. Overlap can arise when there are few unions covering (nearly) all sectors of economic activity (CGSLB/ACLVB in Belgium, CNV and FNV in the Netherlands, as well as GMB and Unite in the UK). Overlap can also result from domain demarcations that, in addition to the sugar sector, include further domains. In the sugar sector these are:

- manufacturing industry (CO-industri in Denmark, FITAG-UGT in Spain);
- food industry and other sectors (beverages, tobacco, hotel and catering, horse racing activities, water industries and/or agriculture, fishing and forestry) (PPDIV in Croatia, NGG in Germany, FEAGRA-CCOO in Spain, FGA CFDT, FGTA-FO and FNAF-CGT in France, Flai-Cgil, Fai-Cisl and Uila-Uil in Italy, SPS NSZZ 'Solidarnosc' in Poland, and FESAHT and SETAA in Portugal);
- retail, services and sales (CFTC-CSFV in France);
- food industry only (FITU Food in Bulgaria, NOS PPP in the Czech Republic, ÉDSZ in Hungary, LMP in Lithuania and SINDALIMENTA-FSIA in Romania).

Sectional overlap occurs in 45% of the cases (21 out of 47 trade unions) and is the second most important domain pattern in the sugar sector. This occurs where trade unions represent certain categories of employees (for example, based on employment status or occupation) from several sectors including the sugar sector. In the sugar sector these are:

- blue-collar workers (Pro-Ge in Austria, CCAS-CSC and FGTB-HORVAL in Belgium, SEL and Metalli in Finland, IF Metall in Sweden);

- white-collar workers (DPA-djp in Austria, SETCA/BBTK and LBC-NVK/CNE in Belgium, Pro and YTN in Finland, CFE-CGC Agro alimentaire in France, De Unie in the Netherlands, Naturvetarna and Unionen in Sweden);
- graduate engineers (Sveriges Ingenjörer in Sweden);
- managers and others in supervisory positions (Ledarna in Sweden).

Moreover, this mode can be found with trade unions representing employees only in one region, a specific type of company, or having certain professional characteristics but not only in the sugar sector. Examples in the framework of this study are:

- FFDI-Podkrepa in Bulgaria representing blue-collar and white-collar workers in the food sector in the region of Veliko Turnovo;
- OZP SR in Slovakia representing blue- and white-collar workers in the food industry in private and multinational companies.

There are no trade unions in the sugar sector showing the domain pattern of sectionalism. This also correlates with the relatively small size of the sector.

In most Member States with more than one sector-related trade union, trade union domains also overlap. While, in Austria, sector-related trade unions do not compete in organising white-collar workers and blue-collar workers, there are 11 Member States where employees in the sugar sector are represented by trade unions with overlapping domains. Patterns range from cases where all sector-related trade unions in one country cover the same domain (for example, Italy where the three trade unions represent blue-collar and white-collar workers in agriculture, forestry, fishing, food industry, and the Netherlands and the UK where all sector-related unions cover (nearly) all fields of economic activity) to cases where one trade union only represents employees in the food sector in one region and the other union does so for the whole country (Bulgaria) or one in the sugar industry and one in the food and adjacent industries (Poland). For further details, see Table A2 in the Annex.

Employer organisations

The structure of sector-related employer organisations in the sugar sector in the EU differs from the trade union structure. In total, the bottom-up screening carried out for this study identified 40 organisations in 21 Member States as relevant: 18 sector-related employer organisations and 22 companies.

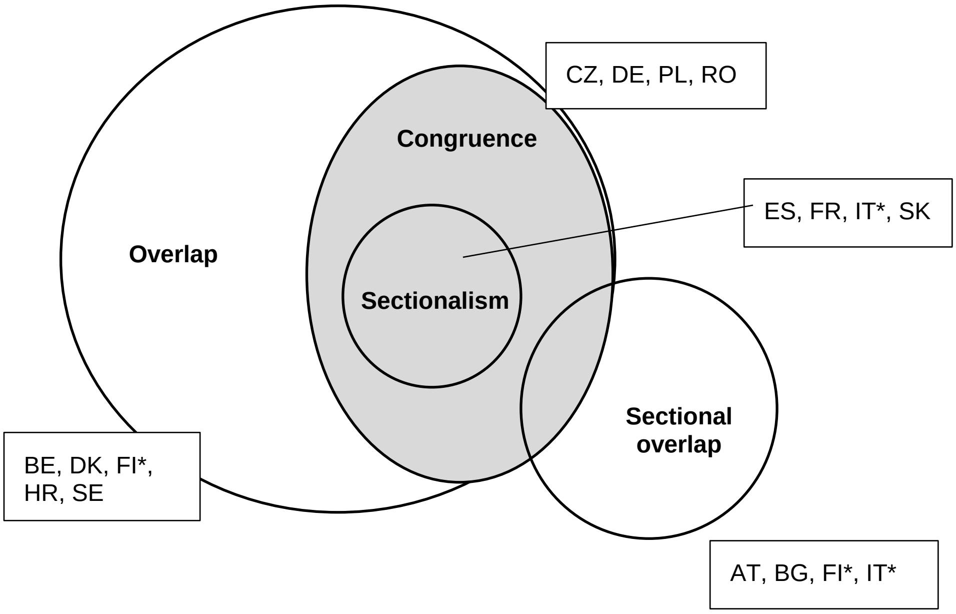
Looking at the landscape of the employer organisations, one peculiarity of the sugar sector is that employer organisations or trade associations exist in only 15 EU Member States. In five of the other six countries (Greece, Hungary, Lithuania, the Netherlands and the UK), companies are corporate members of the sector-related European-level employer organisation, CEFS. The only exception is Portugal, with three sector-related companies not affiliated to CEFS. In total, there are 22 companies from 15 EU Member States included in this study.

As noted in a 2004 Eurofound study on employer organisations in Europe, regarding domain patterns of sectoral relatedness, only employer organisations are taken into consideration.

While in three Member States (Belgium, Italy and Finland) a pluralistic employer organisation landscape for the sugar sector exists, in the other countries, companies are organised only by one organisation.

Employers' domain patterns of sectoral relatedness also differ from trade unions. As illustrated in Figure 3, the pattern of sectionalism and congruence is much more widespread compared with trade unions. A relatively dominant domain pattern is overlap, while sectional overlap, congruence and sectionalism are equally common in the sector.

Figure 3: Domain coverage of employer organisations in the sector



Notes: N = 18.

** Different domain patterns exist in a country.*

For details, see Table A5 in the Annex.

Source: Eurofound's Network of European correspondents, 2016

Overlap occurs with a slight majority in most cases. This results from the principle of employer associations organising not only companies of the sugar sector but also the food sector in general, or different sectors and activities outside the sugar sector. In most cases, these sectors and activities include the food and drink industry, such as SUBEL and FEVIA in Belgium, ETL in Finland and HUP in Hungary . The domain demarcation of the Confederation of Danish Industry (DI) has an industry cross-sectoral domain including the entire manufacturing industry.

Sectionalism occurs in the case of four EU Member States (France, Italy, Slovakia and Spain). This is usually explained by domain demarcation which excludes some activities or subsectors within the sugar sector. In the case of the National Union of Sugar Producers in France (SNFS), its domain demarcation is sectional, given the fact that the organisation does not include the oversea departments and territories of France, which produce a significant amount of cane sugar.[3]

Four EU Member States have organisations showing a membership domain that is congruent with the sector definition. The domain of ČMCS in the Czech Republic, VdZ in Germany, ZPC in Poland and Patronatul Zaharului in Romania largely focuses on the sugar sector as defined in this study.

Sectional overlap occurs in four countries (Austria, Bulgaria, Finland and Italy). This mainly results from domain demarcations of employer organisations excluding certain activities or subsectors within the sugar sector. In the case of Austria, FVNGI represents only sector-related industrial enterprises within the food and drink sector and no small-scale firms.

Congruence (22%) is more frequent for employer organisations than for trade unions. Overlap is more frequent for trade unions, occurring in 51% of the cases compared with 33% for employer organisations. A similar pattern can be observed for sectional overlap, which occurs in 44% of

[3] CEFS reported that, due to recent developments, the membership composition of SNFS has changed, with one company (TEREOS) no longer a member. Also, there are no sugar cane refineries operating in metropolitan France.

trade unions and in 22% of employer organisations. Sectionalism can be observed only for 22% of employer organisations (see Table 7).

Table 7: Domain coverage of sector-related trade unions and employer organisations

	Congruence	Overlap	Sectionalism	Sectional overlap
Trade unions	4.5% (2)	51% (24)	0% (0)	44% (21)
Employer organisations	22.2% (4)	33.3% (6)	22.2% (4)	22.2% (4)

Notes: Number of organisations in each type of domain shown in brackets.

N = 18 for employer organisations (corporate members and companies are not considered).

N = 47 for trade unions.

Source: Eurofound's Network of European correspondents, 2016

Membership figures and organisational strength

Trade unions

Membership is voluntary in all trade unions where information is available (no information is available for LBC-NVK/CNE in Belgium). The total numbers of trade union members (between 234 and 1.1 million), as well as the numbers of those in the sugar sector (ranging from only 8 to about 2,700), vary considerably. About 91% of the trade unions have members in the largest companies (41 out of 45; information is not available in 2 cases).

As for sectoral density (calculated as the ratio of the number of members within the sector to the total number of employees within the sector), figures or estimates for only 29 (out of the total of 47 trade union organisations identified in the study) are available on the number of employees in the sugar manufacturing sector organised in the respective organisation, and on the total number of employees..

Sectoral density ranges from 1.5% to about 88%. Table 8 gives an overview of density patterns. For further details, see Table A1 in the Annex.

Table 8: Sectoral density of trade unions

Sectoral density	Trade union (country)
<10%	CFTC-CSFV and FGTA-FO (FR), Naturvetarna, Ledarna, Sveriges Ingenjörer and Unionen (SE), GMB (UK), De Unie (NL)
10% to <20%	CGSLB/ACLVB (BE), FFDI-Podkrepa (BG), Flai-Cgil (IT), CNV (NL)
20% to <30%	Fai-Cisl (IT), SPS NSZZ 'Solidarnosc' (PL), PPDIV (HR)
30% to <40%	CCAS-CSC alimentation et services/ACV voeding et diensten (BE), NOS PPP (CZ), FEAGRA-CCOO (ES), ÉDSZ (HU), FZZPPC (PL), OZP SR (SK), Unite (UK)
40% to <50%	LMP (LT)
50% to <60%	NGG (DE)
60% to <70%	SINDALIMENTA-FSIA (RO), PRO-GE (AT)
70% to 80%	FITU Food (BG), IF Metall (SE)
>80%	CO-industri (DK)
n.a.	GPA-djp (AT), SETCA / BBTK, FGTB-HORVAL and LBC-NVK / CNE (BE), OEBZ (EL), FITAG-UGT (ES), Metalli, SEL, YTN and PRO (FI), FGA CFDT, FNAF-CGT and CFE-CGC Agro alimentaire (FR), Uila-Uil (IT), FNV (NL), FETESE, SETAA and FESAHT (PT)

Notes: n.a. = not available

For more details, see Table A1 in the Annex.

Source: Eurofound's Network of European correspondents, 2016.

A relatively low sectoral density of less than 10% has been calculated for 8 of the 29 trade unions with data available. In addition, seven trade unions record a sectoral density between 10% and below 30%, and eight between 30% and below 50%. There are six trade unions with a sectoral density higher than 50% (namely, 59% for NGG in Germany, 63% for SINDALIMENTA-FSIA in Romania, 64% for PRO-GE in Austria, 74% for IF Metall in Sweden, 76% for FITU Food in Bulgaria and 88 % for CO-industri in Denmark).

Employer organisations

The majority of employer organisations in the sugar sector rely on a voluntary membership of their member companies. The only exception is Austria, where companies are bound to compulsory membership in their sector-related employer organisation on the basis of the Austrian chamber system.

The quantitative data basis on the number of member companies, as well as the employees in these member companies, as reported by the 18 employer organisations in the sugar sector is comprehensive and more or less exists for all EU Member States with sector-related employer organisations (for details see Table A5 in the Annex).

However, there are some gaps and inconsistencies in the availability and comparability of figures, such as for FVNGI in Austria, FEVIA in Belgium, the Federation of Finnish Technology Industries in Finland, Fedagri in Italy and Patronatul Zaharului in Romania.

For those EU Member States where figures are available, employer organisations in several countries report large number of employees in member companies and a high number of sector-related member companies in general, when compared with the sectoral employment in total, or the total number of sectoral companies in the respective country. This indicates that the sugar sector – although small in its share of employment in the total economy in the majority of countries – has a landscape of employer organisations with a traditionally very high organisational density.

Where membership figures in terms of companies are concerned, sectoral membership density rates are difficult to calculate in a reliable way as mentioned above. However, in general, the membership density of employer organisations, in term of companies, seems to be relatively high in the sugar sector.

The calculated sectoral domain density, in terms of employees, is available for 11 employer organisations and is significantly high (Table 9).

- Five employer organisations in the Czech Republic, Germany, Spain, Poland and Sweden each have a membership density of 100% (and, even over 100% in the case of VdZ in Germany, AGFAE in Spain and IKEM in Sweden, due to inconsistencies in data or different sources).
- Three organisations record densities of more than 85% (SUBEL in Belgium, DI in Denmark and Unionzucchero in Italy).
- The lowest membership density is 40.6% in the case of USSPP in Bulgaria, while that for two organisations is between 45% and 75% (SCS in Slovakia and HUP in Croatia).

Table 9: Membership density of employer organisations in the sugar sector

	Organisation	Members in the sector (companies)	Total number of employees in sector-related member companies	Membership density in terms of employees
AT	FVNGI	1	508*	n.a.
BE	SUBEL	2	1,000 +	91.5%
	FEVIA	1	n.a.	n.a.
BG	USSPP	1	80	40.6%
CZ	ČMCS	5	1,307	100%
DE	VdZ	4	5,600***	100%
DK	DI	1	500	98.2%
ES	AGFAE	2	2,557	100%
FI	ETL	1	180	n.a.
	Federation of Finnish Technology Industries	1	285**	n.a.
FR	SNFS*****	5	6,733	n.a.
HR	HUP	2	540	73.6%
IT	Unionzucchero	2	900	95.1%
	Fedagri	n.a.	n.a.	n.a.
PL	ZPC	4	3,383	100%
RO	Patronatul Zaharului	4	n.a.	n.a.
SE	IKEM	1	415	100%****
SK	SCS	2	322	46%

*Notes: * As of 31 August 2015; number provided by AGRANA as the FIAA did not provide numbers here on grounds of data protection.*

*** The number includes seasonal workers.*

***** Due to inconsistencies and the lack of reliable and comparable data on the number of employees in sector-related member companies, figures on sectoral density in terms of employees may even exceed 100%.*

****** According to CEFS, the company TEREOS is no longer a member of SNFS. Due to this recent development, changes might apply to the number of members of SNFS in the sector from 2016.*

Source: Author's own calculation based on Eurofound's Network of European correspondents, 2016

Collective bargaining

Tables A4, A11 and A12 in the Annex list all the social partners engaged in sector-related collective bargaining. Almost all sector-related trade union and employer organisations identified in this study are involved in collective bargaining, except for the Polish employer organisation ZPC and the Portuguese trade union SETAA. In Romania, collective bargaining takes place only at the intersectoral level and covers the entire food sector. Hence the sector-related employer organisation

Patronatul Zaharului is not involved in collective bargaining. In the case of the Czech association ČMCS, collective bargaining activities are carried out by its members and not directly by the association itself.

Collective bargaining practices and its actors

Collective bargaining practices include multiemployer bargaining (MEB) and single-employer bargaining (SEB). MEB is defined as being conducted by an employer organisation on behalf of the employer side. In the case of SEB, it is the company that is party to the agreement. This includes the cases where two or more companies jointly negotiate an agreement or an employer organisation negotiates on behalf of only one company.

As shown in Table 10, MEB is carried out by trade unions in various Member States. In addition to the northern Member States of Denmark, Finland and Germany, trade unions in eastern European countries such as Bulgaria and Romania are also involved in MEB. Trade unions in 10 Member States are involved in SEB or bargaining at company level only, while 4 countries have trade unions participating in both MEB and SEB.

Table 10: Collective bargaining and bargaining levels of trade union organisations in the sugar sector in EU Member States

Form/level of bargaining	EU Member States
MEB at intersectoral and sectoral level	BG, DE, DK, ES, FI, RO, SE**
Both MEB and SEB	BE*, FR, IT, SK
SEB, also including bargaining at company level	AT, CZ, EL, HR***, HU, LT, NL, PL, PT****, UK
No collective bargaining	None****

*Notes: * The trade union LBC-NVK / CNE in Belgium is the only union involved in MEB.*

*** One exception is the trade union IF Metal in Sweden, which is involved in SEB in the case of one company (Nordic Sugar).*

**** In Croatia, there is no collective bargaining agreement in force, but expired collective agreements are still respected.*

***** Of the 47 trade unions identified, only one – SETAA in Portugal – is not involved in collective bargaining, but other unions in Portugal are.*

Source: Eurofound’s Network of European correspondents, 2016

From the 47 relevant trade unions, 46 (98%) are involved in collective bargaining:

- 18 (39%) participate in MEB;
- 13 (28%) participate in both MEB and SEB;
- 17 (37%) are involved in SEB only.

Among the employer organisations, 83% (15 of 18) are involved in collective bargaining. Table 11 shows that:

- 10 organisations in nine countries have the capacity or competence to conduct collective agreements at multiemployer, intersectoral, sectoral or branch level;
- two organisations from Austria and Croatia are involved only in single-employer collective bargaining;
- three organisations from Belgium, Italy and Sweden show participation in MEB and SEB;

- three organisations from Romania, Poland and the Czech Republic are not involved in sector-related collective bargaining.

Most of the 13 employer organisations involved in MEB are from EU Member States with industrial relations patterns and traditions that are characterised by a strong multilevel system of bargaining at branch level (Belgium, Denmark, Germany, Finland and France). In the case of HUP in Croatia, there are currently no collective bargaining agreements active within the sector.

As stated earlier, 18 corporate members of the sector-related European social partner organisation CEFS have been identified for this study (no information is available for the Italian company S.f.i.r.). One particular case is Portugal; it has no relevant employer organisation, but three sectoral companies DAI, SIDUL and RAR that are not affiliated to CEFS, but which are involved in collective bargaining at company level. These three companies are members of the European-level organisation, ESRA.

Table 11: Collective bargaining practices of employer organisations in the sugar sector in EU Member States

Form/level of bargaining	EU Member States
Involved in collective bargaining at multiemployer and intersectoral/sector/branch level	BE*, BG, DE, DK, ES, FI, FR, IT**, SK
Both MEB and SEB	BE*, IT**, SE
SEB	AT, HR*****
Not involved in sector-related collective bargaining	PL, RO****
No sector-related employer organisations	CZ (ČMCS)***

*Notes: * Multiple employer organisation patterns exist in Belgium. FEVIA is involved in MEB, SUBEL in both MEB and SEB.*

*** In Italy, Fedagri is involved in MEB, Unionzucchero in both MEB and SEB.*

**** As an association, ČMCS is not officially recognised as an employer organisation under Czech law. However, ČMCS is a member of CEFS.*

***** No collective bargaining at sector level, a collective agreement covers the entire food industry.*

****** In Croatia, there is no collective bargaining agreement in force but expired collective agreements are still respected.*

Source: Eurofound's Network of European correspondents, 2016

Most of the corporate members of CEFS have direct involvement in sector-related collective bargaining (there is currently no collective bargaining in Croatia (two companies)) and are covered by either single-employer/company agreements and/or multiemployer agreements.

- Six companies (corporate members) are covered by both single-employer and multiemployer collective agreements (two from Belgium, one from Italy, two from Slovakia and one from Sweden).
- Three companies are covered by multiemployer collective agreements at sector or branch level (one from Denmark and one from Bulgaria) or intersectoral level (one from Finland).
- Eleven companies are covered by SEB (from Austria, Greece, Hungary, Italy, Lithuania, the Netherlands, Portugal and the UK), mainly at company level only.

Collective bargaining coverage

Traditionally, collective bargaining coverage is well above the national averages in the sugar sector. In Eurofound's previous representativeness study on the sugar sector, in 2008, most countries recorded coverage rates of 100%. As of 2016, information is available for 18 of the 21 EU Member States) and shows a similar picture (Table 12).

- In six countries, collective bargaining coverage reaches 100%.
- Seven countries record collective bargaining coverage rates of 80% to 99%.
- Two countries (Poland and Lithuania) achieve between 60% and 80% coverage.
- Only the Netherlands, Portugal and the UK report coverage rates of around 30%.

However , very high bargaining coverage rates of 95%–100% are reported in Member States with a strong practice of collective bargaining and extension practices (Belgium, Finland, France, Italy and Spain),while the three countries (Poland, Portugal and the UK) with the lowest bargaining coverage rates have exclusively SEB.

Depending on national circumstances, several factors often coincide and have to be taken into consideration when explaining high collective bargaining coverage rates and differences in coverage rates in general. From the six Member States with a 100% collective bargaining coverage rate, half show patterns either dominated by SEB (such as Sweden) or with exclusive SEB (Greece and Hungary). Also, in the case of Spain, both MEB and SEB are practised with a coverage rate reaching 95%–100%. Collective bargaining extension schemes exist in four countries (Belgium, Finland, France and Spain), resulting in coverage rates of 95%–100%. Generally, it needs to be stated that extensions may be applied only to multiemployer settlements and the widespread practice of SEB in the EU sugar sector (16 countries) limits their use.

Table 12: Collective bargaining patterns in the sugar sector

	Collective bargaining level		Extension of collective agreements	Collective coverage rate (% of total employees in the sector)
	Multiemployer	Single-employer		
AT		x	No	100%
BE	x	(x)****	Yes	100%
BG	x		No	86.3% (2014)
CZ		x	No	82.5%
DE	x		No	95%
DK		x*	No	90%
EL		x	No	100%
ES	x**	x**	Yes	95%–100%
FI	x		Yes	99%
FR	x		Yes	100%
HR		x	No	n.a.*******
HU		x***	No	100%
IT	x		Yes******	All companies are covered by National Collective Bargaining Agreements (NCBAs)
LT		x	No	60%
NL		x	No	33%
PL		x	No	70%
PT		x	No	30.7%
RO	x*****	x	n.a.	n.a.
SE	x (20%)	x (80%)	No	100%
SK	x	x	No	80%
UK		x	No	34%********

Notes: In Denmark and Finland, collective bargaining coverage is estimated by a Eurofound correspondent or a social partner.

** In Denmark, there is only one company in the sector. Employer is member of an employer organisation and thus covered by a multiemployer agreement.*
*** Only one company collective agreement in Spain, which is negotiated by the employer organisation. According to the Eurofound correspondent, multiemployer bargaining is the prevailing bargaining form.*

**** Only one company in the sector.*

***** Existing but very rare.*

****** Collective agreement for food industry is currently not in force, but was signed for all previous years.*

******* In Italy, the extension scheme only refers to remuneration.*

******** In Croatia, a coverage rate does not apply as the collective agreement is no longer in force.*

********* National contribution refers to questionable reliability of data.*

Source: Eurofound's Network of European correspondents, 2016

Participation in public policy

Apart from the sector-relatedness, organisational and membership strength of social partners and their active involvement in collective bargaining processes, the participation in public policy is an important indicator of the representativeness of national social partner organisations.

Not only is participation in tripartite or bipartite consultation (either on a regular or ad hoc basis) relevant, but also the existence of bipartite or tripartite bodies and institutions in the sugar sector.

Tripartite and bipartite consultation

This study shows that, in 15 EU Member States, at least one trade union related to the sugar sector is consulted in sector-related matters by public authorities. This is also the case for employer organisations in 11 EU Member States. However, fewer than half (47%) of all sector-related trade union organisations (22 out of 47), but nearly three-quarters (72%) of all employer organisations analysed by this study (13 out of 18 organisations) participate in public policies. Furthermore, in most cases, consultation of trade unions by public authorities takes place only on an ad hoc basis while, for employer organisations, consultation on a regular basis prevails (Table 13). Thus, the participation of employer organisations in public policy consultation is stronger than that of trade unions.

As mentioned above, there are 12 Member States with more than one sector-related trade union. In Bulgaria, Italy and Poland, all of these trade union organisations may participate in public policies. In Belgium and Finland, there is at least one trade union that is not involved (information is not available for Austria, France, the Netherlands, Portugal, Spain, Sweden or the UK).

As to employer organisations, Belgium, Finland and Italy are the only countries with more than one employer organisation. Information is not available for Belgium or Finland while, in Italy, all employer organisations participate in public policies.

Table 13: Participation by trade unions and employer organisations in public policies

Consultation practice and participation pattern	Trade unions	Employer organisations
Social partners involved in consultation on a regular basis	BE (CGSLB/ACLVB and SETCA/ BBTK), CZ, DE, PT(FESAHT), RO	AT, BE (FEVIA), ES, FR, IT, PL, RO
Social partners involved in consultation on an ad hoc basis	AT (PRO-GE), BE (CCAS-CSC and FGTB-HORVAL), BG, DK, FI (Pro), FR (FGA CFDT), HR, IT, LT, PL, SK	BG, DK, FI (ETL), HR
No consultation	BE (LBC-NVK/ CNE), EL, ES (FEAGRA-CCOO), FI (SEL, Metalli and YTN), FR (FGTA-FO, CFTC-CSFV and CFE-CGC Agro alimentaire), HU, NL (CNV and De Unie), SE (Ledarna, Naturvetarna, Sveriges Ingenjörer and Unionen), UK (Unite)	DE, SE, SK
No consultation as no sector-related organisation exists	–	EL, HU, LT, NL, PT, UK
No information available	AT (DPA-djp), ES (FITAG-UGT), FR (FNAF-CGT), NL (FNV), PT (FETESE and SETAA), SE (IF Metall), UK (GMB)	BE (SUBEL), CZ, FI (Teknologiateollisuus ry)

Note: Further details are given in Tables A4, A11 and A12 in the Annex.

Source: Eurofound's Network of European correspondents, 2016

In addition to the consultation of trade union and employer organisations, public authorities also consult 13 companies in 11 EU Member States (Austria, Belgium, Bulgaria, Croatia, Denmark, Finland, Hungary, Lithuania, the Netherlands, Sweden and the UK) (out of 22 companies in 15 countries). This also applies to five (Hungary, Lithuania, the Netherlands, Sweden and the UK) of those countries where no sector-related employer organisation and, hence no consultation of employer organisations, exists. In total, there is only one country (Greece) where no participation at all of trade unions, employer organisations or corporate members in public policies was reported.

Bodies dealing with sector-specific public policies

There are five EU Member States where social partners in the sugar sector are actively involved in bodies dealing with sector-specific public policies (Table 14). Important topics and areas addressed by joint bodies are education and (vocational) training, working environment, occupational health and safety, and healthcare as well as forecasts of employment and skills.

The following overview (further details to be found in Table A16 in the Annex) shows that, in total, there are 12 such bodies: one in Bulgaria; 2 in each of Denmark, Finland and France; and 5 in Italy. While in Denmark, France and Italy the bodies identified in this study are bipartite, those in Bulgaria and Finland are tripartite. The legal basis of these bodies is either a statute or an agreement between the parties involved.

In Bulgaria, all the sector-related unions and employer organisations named in this report are involved in the national body. This is also the case for the Sectoral/Branch Working Environment Council of Manufacturing Industry in Denmark, as well as the National Paritarian Employment Commission and the National Paritarian Commission for Economic Information, Employment and Training in France. In Denmark, the Joint Vocational Training Committee for Education in

Manufacturing Industry involves the sector-related employer organisation and the United Federation of Danish Workers 3F.

The Centre for Occupational Health's Occupational Safety Sector Group Food Industries in Finland involves one of the two sector-related employer organisations (ETL) and three out of the four trade unions (Pro, YTN and SEL). The National Education and Training Committee for the Food Sector in Finland involves peak-level organisations but none of the sector-related social partners.

The Italian bodies involve all sector-related trade unions. Employer organisations represented are the General Association of Italian Cooperatives (AGCI), Legacoop, Confcooperative for the National Paritarian Institution for Vocational Training and Environment, and the National Paritarian Committee for Healthcare and Safety at the Workplace. The National Vocational Training Paritarian Institution for the Food Industry and the Supplementary Health Care Fund for Workers of the Food Industry involve one of the two sector-related employer organisations (Unionzucchero) as well an additional 17 other organisations representing different subsectors of the food industry.

Table 14: Bodies dealing with sector-specific public policies

	Name of the body and scope of activity	Character	Basis
BG	• Sectoral Council for Tripartite Cooperation in Food Industry, Ministry of Economy	Tripartite	Statutory
DK	• Joint Vocational Training Committee for Education in Manufacturing Industry • Sectoral/Branch Working Environment Council of Manufacturing Industry	Bipartite	Statutory
FI	• Centre for Occupational Health's Occupational Safety Sector Group Food Industries	Tripartite	Agreement
	• National Education and Training Committee for the Food Sector		Statutory
FR	• National Paritarian Employment Commission	Bipartite	Agreement and statutory
	• National Paritarian Commission for Economic Information, Employment and Training		Agreement
IT	• Food Industry – Sectoral Paritarian Institution • National Vocational Training Paritarian Institution for the Food Industry • Supplementary Health Care Fund for Workers of the Food Industry • National Paritarian Institution for Vocational Training and Environment • National Paritarian Committee for Health Care and Safety at the Workplace	Bipartite	Agreement

Note: For further details, see Table A17 in the Annex.

Source: Eurofound's Network of European correspondents, 2016

European level of interest representation

Overview

At European level, eligibility for consultation and participation in social dialogue is linked to three criteria defined under Article 1 of the European Commission's Communication on adapting and promoting social dialogue at Community level (COM(1998) 0322 final). Accordingly, a social partner organisation must:

- relate to a specific sector or categories and be organised at European level;
- consist of organisations which are themselves an integral part of Member States' social partner structures and have the capacity to negotiate agreements, and which are representative of several Member States;
- have adequate structures to ensure their effective participation in 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 the European associations in the sugar sector will analyse:

- these organisations' membership domains;
- the composition of their membership;
- their capacity to negotiate.

As mentioned previously, there are two sector-related European associations at European level: EFFAT on the workers' side EFFAT and CEFS on the employers' side. Both associations are listed by the European Commission as social partner organisations consulted under Article 154 of the TFEU and both participate in the European Sectoral Social Dialogue Committee for the sugar sector, which was officially established in 1999 by the European Commission. It replaced the informal working group of the European social partners in the sugar sector, founded in 1969.

The following analysis therefore looks first at these two organisations before providing supplementary information on the relevance of other European-level organisations that are linked to the sectors' national social partners (top-down approach).

Membership domains and composition

EFFAT

As stated on its website, EFFAT represents 120 national trade unions in the food, agriculture and tourism sectors from 35 European countries, including all EU Member States. In total, EFFAT organises more than 22 million workers. EFFAT is an autonomous European trade union federation and a member of the European Trade Union Confederation (ETUC) as well as the International Union of Food Workers (IUF). Taking into account that EFFAT also represents trade unions in other sectors outside the sugar manufacturing sector, its domain is overlapping.

Table 15 presents an overview of different patterns of the European-level affiliation and coverage of EU Member States by EFFAT. Multiple memberships to EFFAT occur in nine Member States (Austria, Belgium, Bulgaria, Finland, France, Italy, the Netherlands, Spain and the UK). Only in three EU Member States (Czech Republic, Greece and Sweden) is there no national trade union affiliated to EFFAT.

Table 15: European affiliation of sector-relevant trade unions

European-level affiliation	EU Member States
EU Member States where trade unions are only affiliated to EFFAT (11)	BG, DE, ES, FR*, HR, HU, IT, LT, PT*, RO, SK, NL*
EU Member States with sector-related trade unions affiliated to EFFAT and other European-level trade union organisations (7)	AT, BE, DK, FI, PL, UK
EU Member States where sector-relevant trade unions are not affiliated to EFFAT (3)	CZ*, EL*, SE
EU Member States where no sector-related trade union exist that is affiliated to any European-level organisation (2)	CZ*, EL*

*Notes: *No affiliation for FNAF-CGT (FR) NOS PPP in the Czech Republic, OEBZ in Greece, De Unie in the Netherlands and FESAHT in Portugal, and no information available for FETESE in Portugal).*

For further details, see Table A3 in the Annex.

Source: Eurofound's Network of European correspondents, 2016

As shown in Table 16 and Table A3 in the Annex, EFFAT has 33 members involved in the manufacture of sugar and thus organises 70% of the identified sector-related trade unions. EFFAT has affiliates in 18 out of 21 EU Member States involved in sugar production, hence covering 86% of those Member States where there is a sector-related trade union.

As for collective bargaining, only one of the 33 EFFAT affiliates (SETAA in Portugal) is not involved in either form of collective bargaining. Consequently, 97% (32 out 33) of these EFFAT affiliates in 17 EU Member States with trade unions affiliated to EFFAT are involved in sector-related collective bargaining. In regard to geographical coverage, all trade unions listed cover the whole country apart from FFDI-Podkrepa in Bulgaria which only represents employees in one region.

Some 19 out of 28 trade unions affiliated to EFFAT for which information is available are consulted by public authorities on sector-related issues (information is not available for 5 trade unions).

In nearly all countries where data are available, the largest trade union with a view to membership in the sugar sector and, consequently, sectoral density is affiliated to EFFAT (information is not available for Finland, France, the Netherlands or Portugal). The exception is Poland where the only affiliate is SPS NSZZ 'Solidarnosc' with 820 sector-related members, while the largest union FZZPPC, which has 1,147 members in the sugar sector, is not a member of EFFAT. All sector-related trade unions are affiliated to EFFAT in 13 out of 18 countries where at least one trade union is affiliated to EFFAT (Austria, Belgium, Bulgaria, Croatia, Denmark, Germany, Hungary, Italy, Lithuania, Romania, Slovakia, Spain and the UK).

Summing up, EFFAT covers 70% of sector-related trade unions as well as 86% of Member States with a sector-related organisation. Compared with other sector-related trade union organisations at European level where the most representative trade union represents 11 national trade unions (23%) in 6 countries (29%), EFFAT thus is the most representative organisation. In terms of collective bargaining, EFFAT covers 17 out of 21 EU Member States (81%) and all but one EFFAT affiliate is involved in sector-related collective bargaining.

Table 16: Number of sector-related trade unions in EU Member States

	Number of organisations	Number of trade unions involved in collective bargaining	Number of Member States with an organisation	Number of Member States with an organisation involved in collective bargaining
All sector-related trade unions	47	46	21	21
Affiliates of EFFAT	33	32	18 (AT, BE, BG, DE, DK, ES, FI, FR, HR, HU, IT, LT, NL, PL, PT, RO, SK, UK)	17 (AT, BE, BG, DE, DK, ES, FI, FR, HR, HU, IT, LT, NL, PL, RO, SK, UK)
% of affiliated trade unions to EFFAT	**70%**	**70%**	**86%**	**81%**

*Notes: * No affiliation for FNAF-CGT (France,) NOS PPP(Czech Republic), OEBZ (Greece), De Unie (Netherlands) and FESAHT (Portugal) and no information available for FETESE (Portugal).*

For further details, see Table A3 in the Annex

Source: Eurofound's Network of European correspondents, 2016

CEFS

The European membership pattern of national employer organisations in the sugar sector is clearly dominated by CEFS as the most representative organisation in terms of membership. CEFS has a dual membership structure based on organising both sector-related employer organisations and companies. Representing the sugar manufacturing sector, CEFS is one of the 27 European sector members of FoodDrinkEurope. Though there is potentially an overlapping of domains, as FoodDrinkEurope also organises single corporate members, there is only one CEFS corporate member that is also affiliated to FoodDrinkEurope directly (Südzucker). As for national members that are employer organisations, there is no overlapping of affiliates of CEFS and FoodDrinkEurope.

In the context of this study, 18 employer organisations and 22 sector-related companies have been identified and analysed. Overall, CEFS has 27 affiliations in 20 EU Member States either through sector-related employer organisations or corporate membership of sector-related companies located in countries in which no relevant employer organisation exists. From the 22 companies, 18 are directly affiliated to CEFS (no data are available for S.f.i.r. in Italy.) The only exception is Portugal with neither sector-related employer organisation nor companies affiliated to CEFS.

From the 21 EU Member States with social partners in the sugar sector, 17 have employer organisations or corporate members exclusively affiliated to CEFS (Table 17). There are only nine Member States where at least some organisations are not affiliated to CEFS. In this context, however, these nine countries have a pluralistic landscape of employer organisations and sector-related corporate members. In general, approximately half of the countries identified in this study have structures consisting of more than one employer organisation

Table A9 in the Annex lists the affiliations at national, European and international level of sector-related employer organisations in the EU. As proof of the weight of CEFS as the relevant European-level employer organisation in the European Sectoral Social Dialogue Committee for the sugar sector), a comparison of the affiliation of national organisations with other European organisations is worthwhile. A review of the relevant European organisations in which sector-related organisations are affiliated to was made using a bottom-up approach.

From the sample of national employer or business organisations as well as corporate members, only two are not affiliated to European-level organisations at all. Almost all corporate members (18 out of 22 or 82%) are affiliated to CEFS, in some cases in addition to other organisations (data are not available for S.f.i.r. in Italy) (Table 18). The only exceptions are three Portuguese companies that are not affiliated to CEFS, but are members of ESRA. Among the employer organisations, CEFS has members in 50% of the cases (9 out of 18).

Other than CEFS, this study identified the following European-level employer organisations that represent more than one national employer organisation or corporate member in the sugar sector; with two of them (farmers and sugar refineries) directly related to the sugar sector:

- FoodDrinkEurope representing four employer organisations (FVNGI in Austria, FEVIA in Belgium, HUP in Croatia and ETL in Finland);
- ESRA representing four companies (Zaharni Zavodi AD in Bulgaria and DAI, SIDUL and RAR in Portugal);
- BusinessEurope representing three employer organisations (FEVIA in Belgium, HUP in Croatia and DI in Denmark);
- Copa-Cogeca (European Farmers and Agri-Cooperatives) with two member organisations (HUP in Croatia and Fedagri in Italy).

Table 17: Number of sector-related employer organisations in the EU

	Number of organisations	Number of organisations involved in collective bargaining	Number of Member States with an organisation	Number of Member States with an organisation involved in collective bargaining
All sector-related employer organisations	18	15	15 (AT, BE, BG, CZ, DE, DK, ES, FI, FR, HR, IT, PL, RO, SE, SK)	12 (AT, BE, BG, DE, DK, ES, FI, FR, HR, IT, SE, SK)
Affiliates of CEFS	9	6	9 (BE, CZ, DE, ES, FR, IT, PL, RO, SK)	6 (BE, DE, ES, FR, IT, SK)
% affiliated employer organisations to CEFS	**50%**	**40%**	**60%**	**50%**

Note: For further details, see Table A9 and A11 in the Annex.

Source: Eurofound's Network of European correspondents, 2016

Table 18: Number of sector-related companies in the EU

	Number of companies	Number of Member States with a sector-related company
All sector-related companies	22	15 (AT, BE, BG, DK, EL, FI, HR, HU, IT, LT, NL, PT, SE, SK, UK)
All sector-related companies affiliated to CEFS	18*	14 (AT, BE, BG, DK, EL, FI, HR, HU, IT, LT, NL, SE, SK, UK)
% affiliated to CEFS	**82%**	**93%**

*Notes: * No information available for company S.f.i.r. in Italy.*

For further details, see Table A10 in the Annex.

Source: Eurofound's Network of European correspondents, 2016

Capacity to negotiate

The third criterion of representativeness at European level refers to an organisation's capacity to negotiate on behalf of its members and the existence of adequate structures and resources to participate in European social dialogue.

Following an inquiry in the context of this study, EFFAT as well as CEFS confirmed that both organisations have a mandate to negotiate on behalf of their members. These mandates, however, are different and are briefly described below.

EFFAT

EFFAT states in the preamble to its 2009 constitution (PDF) that its aim is to 'defend the social, economic and cultural interests of employees, in the spirit of a solidary and equality-orientated policy'. In the constitution, the organisation commits itself to the following tasks:

> - *Representation and assertion of members' interests in the sectors covered by EFFAT in addressing and negotiating with the European Institutions, employers' federations, management of companies and other organisations*
>
> - *Negotiations in sector- and TNC-specific questions at European level*
>
> - *Coordination of collective bargaining activities and policies concerning minimum agreements and framework agreements at European-level*
>
> - *Promotion and development of the sectoral and interprofessional Social Dialogue*
>
> (EFFAT constitution, Chapter I.2)

In the constitution, there is a clear reference to EFFAT's mandate to negotiate on behalf of its members. As stated in Chapter IV, the Congress is the supreme body of EFFAT. Between Congresses, the Executive Committee is the political supreme body of EFFAT (Chapter V.1).

> *The Executive Committee will decide on the composition and the mandate of the delegation entrusted with negotiations with the European employers' associations. (...) Decisions on the outcomes of negotiations shall be taken by the Executive Committee. The decision shall have the support of at least*

two-thirds of the organisations directly concerned by the negotiations, which shall have had the opportunity to hold internal consultations.

(EFFAT constitution, Chapter V.3)

Hence, EFFAT has a statutory mandate by its members to negotiate, including agreements.

CEFS

CEFS' statutes stipulate its terms of membership (CEFS, 2010). Accordingly, the following organisations may apply for membership as full members:

- *national organisations of sugar manufacturers when they are representative;*
- *sugar companies, provided that their national organisation is not a member or there is no representative national organisation.*

By 'representative national organisation' shall be understood a trade association representing at least 60% of the national production of white sugar of any European country eligible to apply for membership of the CEFS.

(CEFS statutes, Article 5)

The statutes also stipulate the tasks of the Board of Directors:

2. to determine common positions on subjects of strategic importance to guide the Comité Européen des Fabricants de Sucre in its action;

3. to take decisions which may require studies and conclusions with regard to the work of the Committees and Working Groups;

4. to decide on the creation and dissolutions of Committees and working Groups (...).

(CEFS statutes, Article 2)

Thus, CEFS' legal statutes do not explicitly mention a mandate or any comparable procedure given by its member organisations to negotiate agreements as provided for in Article 155 of the TFEU.

However, both CEFS and EFFAT have regularly adopted and published joint position papers, declarations and engaged in various projects. The European Sectoral Social Dialogue Committee for the sugar sector, which has existed since 1997 and to which they both belong, has conducted several scientific surveys. In the past few years, this committee has covered the following topics:

- corporate social responsibility;
- health and safety;
- restructuring;
- employability;
- integration of organisations from the newest EU Member States and candidate countries.

Through these, the European social partners responded also to the massive effects of the legislative changes in the context of the CAP reform and globalisation.

Regarding CEFS' capacity to negotiate agreements on behalf of its members, the Code of conduct on corporate social responsibility in the European sugar industry (negotiated with EFFAT in 2003) can be regarded as proof of CEFS' capacity to engage in negotiations on behalf of its members. Other examples, as shown in the Table 19, are joint statements, positions and declarations with EFFAT.

Table 19: Joint texts and initiatives negotiated since 2000 in the context of the European Sectoral Social Dialogue Committee for the sugar sector

Title	Year
Joint declaration on apprenticeship in the sugar industry	2000
Corporate social responsibility in the European sugar industry: code of conduct and an Annex with examples of good practice	2003
Brochure on corporate social responsibility and social dialogue in the European sugar industry	2004
Joint position on the mobilisation of the European Globalisation Adjustment Fund	2006
Annual reports on the implementation of the code of conduct on corporate social responsibility	Annually, since 2004
Joint statement: EU sugar social partners call upon the EU institutions to maintain employment levels in the sector and to streamline EU policies	2012
Report *Sociodemographic analyses of the European sugar sector*	2015

Source: European Commission, DG Employment, Social Affairs and Inclusion, European Commission social dialogue texts database and www.eurosugar.org

Other European-level organisations

As final proof of the weight of EFFAT and CEFS, it is useful to look at the other European organisations to which the sector-related trade unions and employer organisations are affiliated (Table 20 and Table 21, respectively).

Table 20: European affiliation of sector-relevant trade unions

European-level affiliation	EU Member States
EU Member States where trade unions are only affiliated to EFFAT (11)	BG, DE, ES, FR*, HR, HU, IT, LT, PT*, RO, SK, NL*
EU Member States with sector-related trade unions affiliated to EFFAT and other European-level trade union organisations (7)	AT, BE, DK, FI, PL, UK
EU Member States where sector-relevant trade unions are not affiliated to EFFAT (3)	CZ*, EL*, SE
EU Member States where no sector-related trade union exist that is affiliated to any European-level organisation (2)	CZ*, EL*

*Notes: * No affiliation for FNAF-CGT (France), NOS PPP (Czech Republic), OEBZ (Greece), De Unie (Netherlands) and FESAHT (Portugal) and no information available for FETESE (Portugal)*

For further details, see Table A3 in the Annex.

Source: Eurofound's Network of European correspondents, 2016

As for the 14 trade unions not affiliated to EFFAT, all of them cover an entire country and are involved in sector-related collective bargaining. Hence a share of 100% of these trade unions are involved in sector-related collective bargaining.

Only 3 out of 11 trade unions not affiliated to EFFAT, for which information is available, are consulted by public authorities (information is not available for 3 trade unions). Sectoral density can be indicated only for eight organisations, accounting for 74% (IF Metall in Sweden), 34% (FZZPPC in Poland), 32% (NOS PPP in the Czech Republic), 9% (De Unie in the Netherlands), 7% (Unionen in Sweden), 6% (Sveriges Ingenjörer and Ledarna in Sweden) and 2% (Naturvetarna in Sweden).

Some 8 out of the 14 trade unions not affiliated to EFFAT are affiliated to other European trade unions (information is not available for one trade union). In two of the countries without affiliation to EFFAT (Czech Republic and Greece), no affiliation to any other European-level organisation was reported. In the case of Sweden, two of the sector-related unions are exclusively affiliated to the European trade union federation IndustriALL (IF Metall, and Unionen), one is affiliated to ETUC (Naturvetarna via Saco), one to IndustriALL and UNI Europa (Sveriges Ingenjörer), and one (the Swedish Association for Managerial and Professional Staff, Ledarna) is affiliated to the European Confederation of Managers (CEC) and the European Federation of Managerial Staff in the Chemical and Allied Industries (FECCIA).

Table 21: European affiliation of sector-relevant employer organisations and corporate members

European-level affiliation	EU Member States
EU Member States with an employer organisation or corporate members affiliated to CEFS (20, only exception PT)	AT, BE, BG, CZ, DE, DK, EL, ES, FI, FR, HR, HU, IT, LT, NL, PL, RO, SE, SK, UK
EU Member States with an employer organisation or corporate members only affiliated to CEFS (17)	AT, BE, CZ, DE, DK, EL, ES, FI, FR, HR, HU, IT, LT, NL, RO, SE, SK
EU Member States with sector-related employer organisations and corporate members affiliated to CEFS and other European-level organisations/ associations (21)	AT, BE, BG, CZ, DE, DK, EL, ES, FI, FR, HR, HU, IT, LT, NL, PL, PT, RO, SE, SK, UK
EU Member States with sector-relevant employer organisations or corporate members not affiliated to CEFS (9)	AT, BE, BG, DK, FI, HR, IT, PT, SE

Notes: There are multiple employer organisations or corporate members in the following countries: Austria, Belgium, Bulgaria, Croatia, Denmark, Finland, Italy, Portugal, Slovakia and Sweden.

No employer organisation was identified in Latvia.

For further details, see Table A9 and A10 in the Annex.

Source: Eurofound's Network of European correspondents, 2016.

Looking at employer organisations or companies that are affiliated to other European-level organisations and not to CEFS, affiliations exist to FoodDrinkEurope, Business Europe and ESRA in the case of more than one organisation. Regarding FoodDrinkEurope, all four affiliated organisations have domain patterns of a multisectoral character, representing, for example, the whole food and drink industry (FEVIA in Belgium) or industrial enterprises in the food and drinks industry (FVNGI in Austria) and are therefore clearly reaching beyond the scope of the sugar sector. FoodDrinkEurope is an umbrella organisation of which CEFS is a member.

Business Europe represents three organisations which are either a confederation (DI in Denmark) or of multisectoral character representing the entire food and drink sector as well as agricultural industry (for example FEVIA in Belgium or HUP in Croatia).

The other EU-level organisation with four sector-related organisations is ESRA. This exclusively represents sugar refinery companies (three in Portugal and one in Bulgaria) and no employer organisation or sector-related interest association at national level.

As a result, CEFS represents 27 out of 40 sector-related organisations and corporate members (68%) in 20 out of 21 Member States with sugar production. Thus, compared with other European-level employer organisations, CEFS is the most representative European-level employer organisation in the sugar sector.

Trade unions

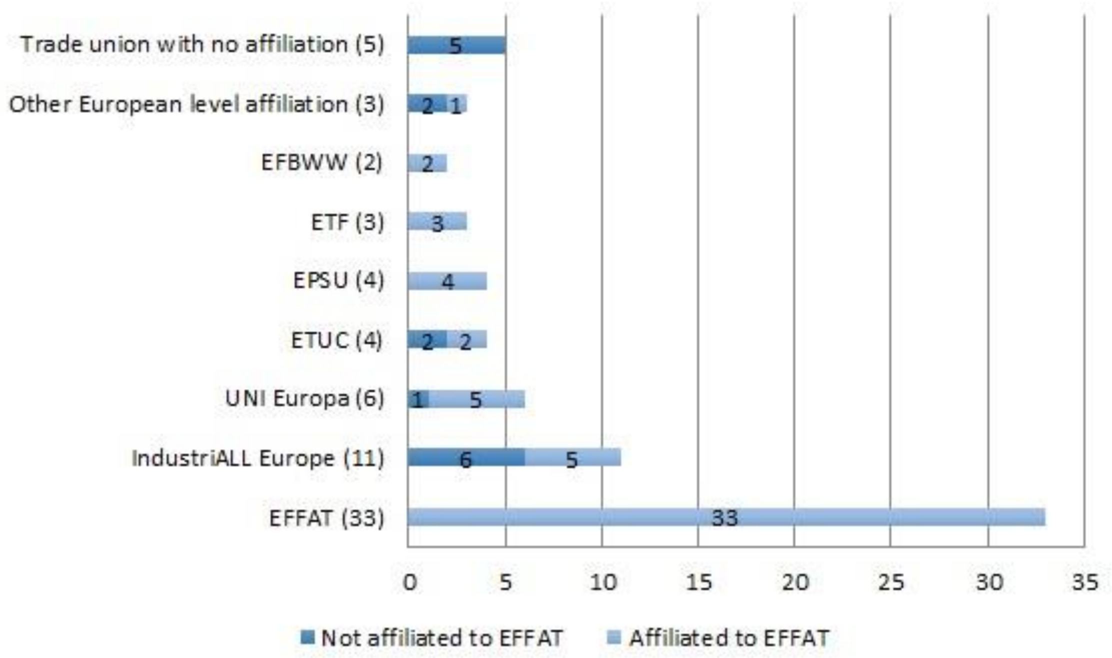
Looking at the European affiliation of the 47 trade union organisations in the 21 EU Member States the following pattern of affiliation emerges (Figure 4).

- Nearly 11% (or 5 out of 47) national trade unions are not affiliated to any European-level trade union organisation (information is not available for one organisation).
- About 19% (9) of the sector-related trade union organisations are affiliated to at least two European-level trade union organisations.

- The overwhelming majority (32 organisations representing a share of around 68% of the trade union organisations) are affiliated only to one European-level trade union.

This study's analysis identified six European trade union organisations as relevant, as they represent national organisations with a link to the sugar sector representing more than one national trade union. Apart from EFFAT, these are IndustriALL, the European services workers' union UNI Europa, the European Federation of Public Service Unions (EPSU), the European Transport Workers' Federation (ETF) and the European Federation of Building and Woodworkers (EFBWW). The largest share of national trade union organisations (70%) is affiliated to EFFAT, with IndustriALL accounting for 23.4% of affiliations, UNI Europa (12.8%) and EPSU (8.5%). Furthermore, 8.5% of the national trade union organisations are affiliated via their national umbrella organisations to the cross-sectoral ETUC that represents national union confederations and is also the umbrella organisation of the European-level sector-related trade union federations.

Figure 4: Number of trade union organisations in the sugar sector by European affiliation



Notes: N = 47 trade union organisations in 21 EU Member States.

Total number of affiliates per European organisation is given in brackets.

No information was available for one trade union.

For further details, see Table A3 in the Annex.

Source: Eurofound's Network of European correspondents, 2016.

This study has shown that, among the seven European-level trade union federations mentioned above, in addition to EFFAT there are four with national affiliates related to the sugar sector in more than three EU Member States. By far the most important of these trade union federations is IndustriALL, which has manufacturing-related national affiliates in six EU Member States (Austria, Belgium, Denmark, Finland, Sweden and the UK). IndustriALL is followed by UNI Europa with sector-related members in four countries (Austria, Belgium, Sweden and the UK), and EPSU (Austria, Belgium and the UK) and ETUC (Austria, Poland and Sweden) each with sector-related members in three countries.

In terms of the coverage of additional organisations and countries, IndustriALL would add only one extra country (Sweden) as well as five additional affiliates (Metalli and YTN in Finland, with IF Metall, Sveriges Ingenjörer and Unionen in Sweden). The two Finnish trade unions, as well as Sveriges Ingenjörer and Unionen, participate in MEB but are not consulted by public authorities. IF Metall is involved in SEB covering 300 employees (information on consultation is not available). While IF Metall is the largest national sector-related union organisation this is not the case for the others.

ETUC adds two affiliates: FZZPPC via The All-Poland Alliance of Trade Unions (OPZZ) in Poland; and Naturvetarna, a federation of Swedish trade unions representing professionals working in natural science or related areas, through the Swedish Confederation of Professional Associations (Saco). UNI Europa adds one (Sveriges Ingenjörer in Sweden) and EPSU none.

Against this, considering the organisational strength and qualitative coverage of the four above-mentioned union organisations, the coverage of the sugar sector would not increase significantly, if included in the ESSDC.

Thus, this study's analysis shows that EFFAT is, clearly, the most relevant and representative organisation in the sugar sector.

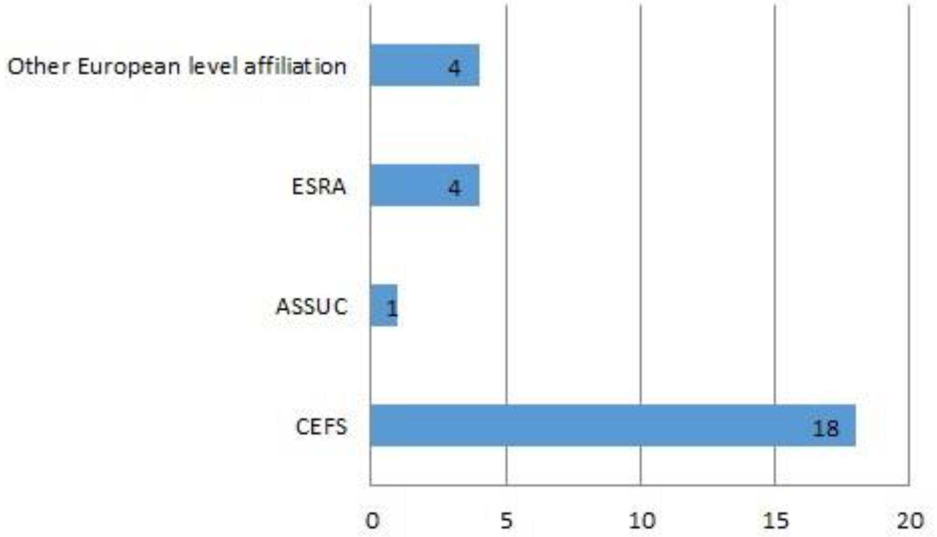
Employer organisations

Regarding the review of membership of the national employer or business organisations as well as companies, 11% (2 out of 18) do not have any affiliation to a European-level organisations. Almost all companies (18 out of 22, 82%) are affiliated to CEFS, in some cases in addition to other organisations (data are not available for S.f.i.r. in Italy), according to the top-down approach. The three Portuguese companies not affiliated to CEFS are members of ESRA.

Three European-level employer organisations have been identified that represent national employer organisations or companies in three or more EU Member States. These are CEFS, representing 9 out of 18 employer organisations as well as 18 out of 22 corporate members, FoodDrinkEurope (four employer organisations in four countries) and BusinessEurope (three employer organisations in three countries).

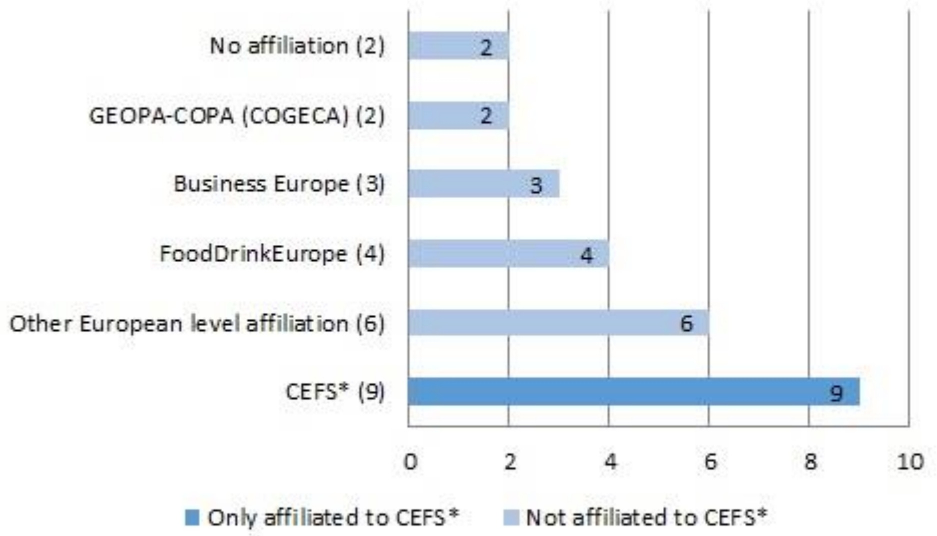
Figure 5 and Figure 6 give overviews of the European affiliation of corporate members and employer organisations, respectively.

Figure 5: Number of corporate members by European affiliation



Notes: N = 22 corporate members in 15 EU Member States.
No information was available for S.f.i.r. in Italy.
For further details, see Tables A9 and A10 in the Annex.
Source: Eurofound's Network of European correspondents, 2016

Figure 6: Number of employer organisations by European affiliation



Notes: N = 18 employer organisations in 15 EU Member States.
** FoodDrinkEurope is an umbrella organisation of which CEFS is a member.*
Total number of affiliates per European organisation is given in brackets.
For further details, see Tables A9 and A10 in the Annex.
Source: Eurofound's Network of European correspondents, 2016

In total, CEFS represents 27 out of 40 sector-related organisations and corporate members (68%) in 20 out of 21 Member States; the only exception is Portugal which has no sector-related employer organisation and three corporate members affiliated to ESRA. Among the 22 companies identified in this study, 18 are affiliated to CEFS. The share of employer organisations with membership in CEFS is smaller, totalling 9 out of 18.

While FEVIA in Belgium and HUP in Croatia are direct members of both FoodDrinkEurope and Business Europe, FoodDrinkEurope also represents FVNGI in Austria and ETL in Finland. In Denmark, DI is affiliated to Business Europe. Neither BusinessEurope nor FoodDrinkEurope represent any additional EU Member States.

Looking at the national organisations affiliated to these two European employer organisations, FVNGI is the only sector-related employer organisation in Austria with a membership density of 100%, in terms of companies. However, the only relevant company in Austria is AGRANA which is affiliated to CEFS. In Belgium, FEVIA represents companies in the whole food sector whereas SUBEL, which is affiliated to CEFS and a member of FEVIA, has two members: Raffinerie Tirlemontoise SA and Iscal Sugar SA (which are both also affiliated to CEFS). DI in Denmark has one member in the sector, being itself affiliated to CEFS. Also in Croatia, two sector-related members of HUP are directly affiliated to CEFS. Finally, in Finland, the member company of the Federation of Finnish Technology Industries has more sector-related employees than ETL.

Based on this analysis, neither BusinessEurope nor FoodDrinkEurope represent an adequate EU employer organisation to be admitted to the European Sectoral Social Dialogue Committee for the sugar sector. Hence, CEFS is the most relevant and representative European employer organisation related to the sugar sector.

Conclusions

The European sugar manufacturing sector has experienced a massive restructuring phase throughout the past decade, resulting in a significant decrease in employment and in the number of enterprises. As a relatively small and traditional economic sector within the food processing industry, industrial relations within the sugar industry are characterised by some specific features. This study is a proof of the strong organisations on the employees' side and on the employers' side in terms of membership domain and strength and involvement in collective bargaining.

On the employees' side, this representativeness study has identified 47 sector-related trade unions in 21 EU Member States in the sugar sector (there are now no sector-related economic activities in Latvia). A more or less pluralistic structure exists in 67% of these 21 Member States. The trade union landscape at national level is fragmented in the following countries where more than two trade unions exist: in Belgium, France and Sweden with five unions each, in Finland with four trade unions, and in Italy, the Netherlands and Portugal with three unions each.

On the employers' side, 18 employer organisations and 22 companies were identified as sector-related. One peculiarity of the sugar sector is that employer organisations or trade associations exist in only 15 EU Member States, while in the other countries (Greece, Hungary, Lithuania, Netherlands and the UK), companies are directly affiliated as corporate members to the sector-related European-level employer organisation CEFS. The only exception is Portugal, where the bottom-up approach applied in this study identified three companies that are involved in collective bargaining and are not affiliated to CEFS but to another European-level organisation (ESRA). In the majority of Member States, the landscape of business/employer organisations is monopolistic. Only in two countries (Finland and Italy) is there a pluralistic employer organisation landscape for the sugar sector.

With regard to trade unions' domain patterns of sectoral relatedness, the most frequent domain pattern is overlap (51% of all unions), followed by sectional overlap (45%). Only two trade unions (OEBZE in Greece and FZZPPC in Poland) demarcate their domain as congruent. Overlap occurs in countries where general unions are the most important pattern of union organisation or in cases where unions have superordinate and/or adjacent domains in addition to the sugar sector (for example, the manufacturing or food industries). The domain patterns of sectoral relatedness in the case of employer organisations differ from trade unions. While overlap is the dominant domain pattern (five organisations), sectional overlap, sectionalism and congruence are equally common in the sector (four organisations respectively).

Sectoral density for trade unions ranges between 1.5% and 88%, with six unions recording a higher density rate than 50% for the entire sectoral domain (PRO-GE in Austria, FITU Food in Bulgaria, CO-industri in Denmark, NGG in Germany, SINDALIMENTA-FSIA in Romania and IF Metall in Sweden). On the employers' side, the strong influence of public regulation and agricultural policies on the sugar industry during the past decade has favoured the emergence of relatively strong employer interest organisations within the sector. This is reflected in the particularly high membership density in terms of employees in the majority of EU Member States. Five employer organisations have membership density in terms of employees of 100%, with three organisations reaching over 85%, and even the lowest rate exceeding 40% (USSPP in Bulgaria).

Collective bargaining coverage is traditionally high in the sugar sector. This representativeness study shows that, from the 18 countries with available data, 6 countries reached coverage rates of 100%, 7 countries between 80% and 99%, while 2 countries achieved a collective bargaining coverage of between 60% and 80%. Only three countries reported collective bargaining coverage rates of around 30%. From the 21 EU Member States involved in this study, all show participation in collective bargaining, either in MEB, both MEB and SEB or SEB only. A comparable pattern can be observed for the actors involved in collective bargaining. Almost all social partner organisations identified in this study are engaged in sector-related collective bargaining, with the only exceptions being ČMCS in the Czech Republic (no direct involvement as association), ZPC in Poland, SETAA in Portugal and Patronatul Zaharului in Romania (covered by a collective agreement for the food industry) and

Where participation in public policy is concerned, fewer than half (47%) of all sector-related trade union organisations (22 out of 47 organisations), but nearly three-quarters (72%) of all employer organisations analysed by this study (13 out of 18 organisations) are consulted by public authorities on sector-related matters. This study also shows that consultation patterns differ; while trade unions are consulted, with one exception, on an ad hoc basis, employer organisations are consulted regularly.

In five countries (Bulgaria, Denmark, Finland, France and Italy), a total of 12 bipartite or tripartite bodies were identified dealing with sector-specific public policies in which social partners are actively involved. Important topics and areas addressed by these joint bodies are education and training, working environment, occupational health and safety, healthcare and forecasting employment and skills. However, the scope of all these bodies is not only the sugar sector but the food sector in general, or even beyond.

With regard to the sector-related European associations, EFFAT on the employees' side and CEFS on the employers' side are the two relevant organisations and also the only social partners in the European Sectoral Social Dialogue Committee for the sugar sector. As seen from the mapping of individual organisations (top-down approach), EFFAT has 33 direct members representing 70% of the unions identified in this study in 18 out of 21 EU Member States (86%). There are only three EU Member States where there is a sector-related trade union that is not affiliated to EFFAT (the Czech Republic, Greece and Sweden).

Compared with other sector-related trade union organisations at European level where the most representative trade union represents 11 national trade unions (23%) in 6 EU Member States (29%), EFFAT thus is the most important organisation. Only one of the other European-level trade union organisations represents an additional EU Member State.

Of the 46 trade unions involved in sector-related collective bargaining, 32 (70%) are affiliated to EFFAT. All but one EFFAT affiliates are involved in sector-related collective bargaining.

There are trade unions involved in collective bargaining in 21 EU Member States. EFFAT has an affiliate involved in collective bargaining in 17 of these 21 EU Member States (81%). In four EU Member States there are trade unions involved in collective bargaining that are not affiliated to EFFAT. This is the case in the Czech Republic, Greece, Portugal and Sweden.

The mapping clearly shows that EFFAT is the biggest and most representative organisation in the sugar sector.

For the employers', CEFS has 27 direct affiliations out of 40 sector-related employer organisations and companies (68%) (with 9 employer organisations and 18 companies affiliated to CEFS) in 20 EU Member States. Half of the 18 sector-related employers' organisations are affiliated to CEFS. There is a sector-related employer organisation in 15 of these Member States and CEFS has one affiliate each in 9 Member States. The Member States where there is a sector-related employer organisation and no affiliate to CEFS are: Austria, Bulgaria, Croatia, Denmark, Finland and Sweden. CEFS has corporate members in all these EU Member States.

There are 15 employer organisations involved in sector-related collective bargaining. Six of them are affiliated to CEFS. Of the 12 EU Member States with an employer organisation involved in collective bargaining, there are 6 where there is an affiliate of CEFS involved in collective bargaining.

Added to this are the 22 sector-related companies, of which 18 are affiliated to CEFS. Including the employer organisations and companies, CEFS has an affiliate in 20 different EU Member States.

This study could identify only one further European-level employer organisation that seems sector-relevant and has national affiliates such as employer organisations in more than three EU Member States (FoodDrinkEurope).

According to the three criteria defined under Article 1 of European Commission Communication COM(1998) 322 final, European social partner organisations that are eligible to be consulted must:

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

The two European social partners under consideration, EFFAT and CEFS, both fulfil these criteria. While EFFAT has a statutory mandate to negotiate on behalf of its national members, no statutory mandate is explicitly mentioned in the legal statutes of CEFS. However, CEFS' involvement in the European Sectoral Social Dialogue Committee for the sugar sector and the outputs produced by both European-level social partners demonstrate its capacity to engage in negotiations with EFFAT, indicating that CEFS has a 'de facto mandate' to take part in negotiations.

The analysis in this study of the sugar sector in the European Union therefore results in the following general conclusions: CEFS for the employers' side ought to be regarded as the most important EU-wide representative organisation of employers in the sugar sector, and EFFAT the most important European-level organisation for the trade union side.

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Annex: Additional tables

Table A1: Trade union domain coverage and membership

	Organisation	Domain coverage	Type of membership	Total members*	Members in the sector	Sectoral density	Members in the largest companies
AT	PRO-GE	Sectional overlap	Voluntary	~230,000	325	64.0%	yes
	GPA-djp	Sectional overlap	Voluntary	172,300	n.a.	n.a.	yes
BE	CGSLB/ ACLVB	Overlap	Voluntary	294,000	110	10.1%	yes
	CCAS-CSC alimentation et services/ ACV voeding et diensten	Sectional overlap	Voluntary	160,000 (80,000 non-active members)	350	32.0%	yes
	SETCA/ BBTK	Sectional overlap	Voluntary	340,000	n.a.	n.a.	yes
	FGTB-HORVAL	Sectional overlap	Voluntary	n.a.	n.a.	n.a.	yes
	LBC-NVK/ CNE	Sectional overlap	n.a.	n.a.	Over 6,000 (food sector)	n.a.	yes
BG	FITU Food	Overlap	Voluntary	2,500	150	76.1%	yes
	FFDI-Podkrepa	Sectional overlap	Voluntary	1,000	20	10.2%	no
CZ	NOS PPP	Overlap	Voluntary	8,044	422	32.3%	yes
DE	NGG	Overlap	Voluntary	203,870	2,685	59.0%	yes
DK	CO-industri	Sectional overlap	Voluntary	228,962	450	88.4 %	yes
EL	OEBZ	Congruence	Voluntary	234	234	n.a.	yes
ES	FEAGRA-CCOO	Overlap	Voluntary	n.a.	522	31.4%	yes
	FITAG-UGT	Overlap	Voluntary	n.a.	n.a.	n.a.	yes
FI	SEL	Sectional overlap	Voluntary	20,000	90-120	n.a.	no
	PRO	Sectional overlap	Voluntary	85,000	225	n.a.	yes
	Metalli	Sectional overlap	Voluntary	113,000	40	n.a.	no
	YTN	Sectional overlap	Voluntary	160,000	n.a.	n.a.	yes
FR	FGA CFDT	Overlap	Voluntary	60,000	n.a.	n.a.	yes

	Organisation	Domain coverage	Type of membership	Total members*	Members in the sector	Sectoral density	Members in the largest companies
	FGTA-FO	Overlap	Voluntary	30,000	322	4.8%	yes
	CFTC-CSFV	Overlap	Voluntary	22,000	100	1.5%.	no
	FNAF-CGT	Overlap	Voluntary	n.a.	n.a.	n.a.	yes
	CFE-CGC Agro alimentaire	Sectional overlap	Voluntary	n.a.	n.a.	n.a.	yes
HR	PPDIV	Overlap	Voluntary	20,000	220	30 %	yes
HU	ÉDSZ	Overlap	Voluntary	3,400	115	31.6%	yes
IT	Flai-Cgil	Overlap	Voluntary	194,035	162	17.1%	yes
	Fai-Cisl	Overlap	Voluntary	120,000	200	21.1%	yes
	Uila-Uil	Overlap	Voluntary	221,588	n.a.	n.a.	yes
LT	LMP	Overlap	Voluntary	1,589	163	42.9%	yes
NL	CNV	Overlap	Voluntary	360,000	100	14.8%	yes
	De Unie	Sectional overlap	Voluntary	60,000	60	8.9%	yes
	FNV	Overlap	Voluntary	1,100,000	n.a.	n.a.	yes
PL	SPS NSZZ ‘Solidarnosc’	Overlap	Voluntary	800,000	820	24.3%	yes
	FZZPPC	Congruence	Voluntary	1,147	1,147	33.9%	yes
PT	FESAHT	Overlap	Voluntary	n.a. (confidential)	n.a. (confidential)	n.a.	yes
	FETESE	Sectional overlap	Voluntary	n.a.	n.a.	n.a.	n.a.
	SETAA	Overlap	Voluntary	n.a.	n.a.	n.a.	n.a.
RO	SINDALIMENTA-FSIA	Overlap	Voluntary	18,500	1,000	62.9%	yes
SE	IF Metall	Sectional overlap	Voluntary	254,000	265	73.6%	yes
	Ledarna	Sectional overlap	Voluntary	90,000	20 (estimated)	5.6%	yes
	Naturvetarna	Sectional overlap	Voluntary	31,000	8 (estimated)	2.2%	yes
	Sveriges Ingenjörer	Sectional overlap	Voluntary	118,651	21 (estimated)	5.8%	yes
	Unionen	Sectional overlap	Voluntary	500,000	25 (estimated)	6.9%	yes
SK	OZ potravinárov	Sectional overlap	Voluntary	1,920	220	31.4%	yes

	Organisation	Domain coverage	Type of members hip	Total members*	Members in the sector	Sectoral density	Members in the largest companies
	SR (OZP SR)						
UK	GMB	Overlap	Voluntary	625,643	280	8.2%	yes
	Unite the Union	Overlap	Voluntary	1,100,000	1,050	30.9%	yes

*Notes: * Includes non-active members.*

n.a. = information not available

Source: Eurofound's Network of European correspondents, 2016

Table A2: Domain description of trade union organisations

	Name	Domain description
AT	PRO-GE	Blue-collar workers in production sectors
	DPA-djp	White-collar workers in the private sector
BE	CGSLB/ ACLVB	Blue- and white-collar workers
	CCAS-CSC	Blue-collar workers in food industry, agriculture, horticulture, cleaning companies, private security, hotels-restaurants-pubs, service voucher, family care, food trade
	SETCA/ BBTK	White-collar workers in the private sector
	FGTB-HORVAL	Blue-collar workers in the food and hotel, restaurant and catering services sector
	LBC-NVK/ CNE	White-collar workers in the food sector
BG	FITU Food	Blue- and white-collar workers in the food sector
	FFDI-Podkrepa	Blue- and white-collar workers in the food sector in the region of Veliko Turnovo
CZ	NOS PPP	Blue- and white-collar workers in the food sector
DE	NGG	Blue- and white-collar workers in the food, beverages, tobacco, hotel and catering sector
DK	CO-industri	Blue- and white-collar workers in the manufacturing industry (excluding engineers)
EL	OEBZ	Blue- and white-collar workers at enterprise-level union covering only one company, the Hellenic Sugar Industry SA – the only company in the sector in Greece
ES	FEAGRA-CCOO	Blue- and white-collar workers in the food and drink sector as well as agriculture
	FITAG-UGT	Blue- and white-collar workers in the manufacturing industry
FI	SEL	Blue-collar workers in the food and drink industry
	Pro	White-collar workers in the private sector in various fields, including industry, finance, services, ICT and communications
	Metalli	Blue-collar workers in technology industry, car repair workshops, clerical employees of car retail, telecommunications industry, mining, electricity and power plants, the precious metals' sector, sheet metal industry, repair

	Name	Domain description
		works for mechanical forest industry, and civilian workers in the Ministry of Defence repair shops including maintenance, repair and installation of production machinery in the sugar sector
	YTN	White-collar workers in refining and manufacturing
FR	FGA CFDT	Blue- and white-collar workers in the food and drink industry, cooperatives, services to agriculture, agriculture social security, Agriculture
	FGTA-FO	Blue- and white-collar workers in the agro-food industry, hairdressers and beauty therapists, hotels and restaurants, services to individuals, retail trade, craftwork food producers
	CFTC-CSFV	Blue- and white-collar workers in retail, services and sales
	FNAF-CGT	Blue- and white-collar workers in agriculture, food craftwork, food and drink industry, horse race activities, forest industry
	CFE-CGC Agro alimentaire	White-collar workers and managers in food and drink industry, cooperatives; services to agriculture, accountability services for agriculture, agriculture social security, agriculture production and processing, retail (supermarket networks)
HR	PPDIV	Blue- and white-collar workers in food, tobacco and water industries
HU	ÉDSZ	Blue- and white-collar workers in food industries
IT	Flai-Cgil	Blue- and white-collar workers in agriculture, forestry, fishing, food industry, and storage of vegetables and fruits
	Fai-Cisl	Blue- and white-collar workers in agriculture, forestry, fishing, food industry
	Uila-Uil	Blue- and white-collar workers in agriculture, forestry, fishing, food industry
LT	LMP	Blue- and white-collar workers in the food industry
NL	CNV	Blue- and white-collar workers in nearly all sectors of economic activity
	De Unie	Emphasis on white-collar workers but also blue-collar workers in the private sector
	FNV	Blue- and white-collar workers in nearly all sectors of economic activity
PL	SPS NSZZ ‘Solidarnosc’	Blue- and white-collar workers in the sugar, tobacco industry, dairy, alcohol, confectionery and baking, fruit and vegetable, accommodation and catering, meat and brewing industry as well as games and lottery
	FZZPPC	Blue- and white-collar workers in the sugar industry
PT	FESAHT	Blue- and white-collar workers in agriculture, food and beverages Industries, hotels and tourism
	FETESE	Blue- and white-collar workers in the services sector
	SETAA	Blue- and white-collar workers in agriculture, food and forests sector
RO	SINDALIMENTA-FSIA	Blue- and white-collar workers in the food industry
SE	IF Metall	Blue-collar industrial workers
	Ledarna	Managers and others in a leading position in all sectors
	Naturvetarna	White-collar workers (university graduates in natural sciences such as

	Name	Domain description
		chemists)
	Sveriges Ingenjörer	Graduate engineers in all sectors
	Unionen	White-collar workers within the private sector
SK	OZP SR	Blue- and white-collar workers in the food industry in private and multinational companies
UK	GMB	Blue- and white-collar workers in the whole economy
	Unite	Blue- and white-collar workers in the whole economy

Source: Eurofound's Network of European correspondents, 2016

Table A3: Trade unions' international, European and national affiliations

	Organisation	National affiliation	European affiliation	International affiliation
AT	PRO-GE	ÖGB	EFFAT, ETUC, IndustriALL Europe	IndustriALL Global, ITUC, IUF, TUAC
	GPA-djp	ÖGB	EFFAT, EFJ, EPSU, ETUC, IndustriALL Europe, UNI Europa	IndustriALL Global, ITUC, UNI Global Union, WOW
BE	CGSLB/ ACLVB	(CGSLB/ACLVB is a national-level organisation)	EFFAT	IUF
	CCAS-CSC alimentation et services/ACV voeding en diensten	CSC	EFFAT, UNI Europa	IUF, UNI Global Union
	SETCA/BBTK	ABVV-FGTB	EFFAT, EPSU, ETF, IndustriALL Europe, UNI Europa	IndustriALL Global, ITF, IUF, PSI, UNI Global Union
	FGTB-HORVAL	FGTB	EFFAT	IUF
	LBC-NVK/CNE	ACV	EFFAT	IUF
BG	FITU Food	CITUB	EFFAT	IUF
	FFDI-Podkrepa	CL Podkrepa	EFFAT	n.a.
CZ	NOS PPP	ČMKOS	none	n.a.
DE	NGG	DGB	EFFAT	IUF
DK	CO-industri	The Danish Confederation of Trade Unions (LO)	EFFAT, IndustriALL Europe	IndustriALL Global
EL	OEBZ	GSEE	none	n.a.
ES	FEAGRA-CCOO	CCOO	EFFAT	n.a.
	FITAG-UGT	UGT	EFFAT	n.a.
FI	SEL	SAK	EFFAT	IUF

	Organisation	National affiliation	European affiliation	International affiliation
	Pro	STTK, TP	EFFAT	IUF, Nordic Union
	Metalli	SAK, TP	IndustriALL Europe	IndustriALL Global, Industri Nord, UNI Global Union
	YTN	Akava, TP (through IL)	IndustriALL Europe	n.a.
FR	FGA CFDT	CFDT	EFFAT	IUF
	FGTA-FO	FO	EFFAT	IUF
	CFTC-CSFV	CFTC	EFFAT	IUF
	FNAF-CGT	CGT	none	n.a.
	CFE-CGC Agro alimentaire	CFE-CGC	EFFAT	IUF
HR	PPDIV	Autonomous Trade Union of Croatia	EFFAT	IUF
HU	ÉDSZ	MaSZSZ	EFFAT	IUF
IT	Flai-Cgil	CGIL	EFFAT	IUF
	Fai-Cisl	CISL	EFFAT	IUF
	Uila-Uil	UIL	EFFAT	IUF
LT	LMP	LPSK	EFFAT	IUF
NL	CNV	Not applicable	EFFAT	n.a.
	De Unie	UOV	none	n.a.
	FNV	Not applicable	EFFAT	IUF
PL	SPS NSZZ ‘Solidarnosc’	NSZZ ‘Solidarnosc’	EFFAT	n.a.
	FZZPPC	OPZZ	ETUC	n.a.
PT	FESAHT	CGTP-IN	none	n.a.
	FETESE	UGT	n.a.	n.a.
	SETAA	UGT	EFFAT	n.a.
RO	SINDALIMENT A-FSIA	CNSLR	EFFAT	IUF
SE	IF Metall	The Swedish Trade Union Confederation (LO)	IndustriALL Europe	IndustriALL Global, Nordic IN
	Ledarna	n.a.	CEC, FECCIA	n.a.
	Naturvetarna	Saco	ETUC	n.a.
	Sveriges Ingenjörer	Facken inom industrin, PTK, Saco	IndustriALL Europe, UNI Europa	IndustriALL Global, UNI Global Union
	Unionen	TCO	IndustriALL Europe	IndustriALL Global
SK	OZ potravinárov SR	KOZ SR	EFFAT	IUF

	Organisation	National affiliation	European affiliation	International affiliation
UK	GMB	TUC	EFBWW, EFFAT, EPSU, ETF, IndustriALL Europe, UNI Europa	BWI, IndustriALL Global, ITF, IUF, PSI, UNI Global Union
	Unite	TUC	EFBWW, EFFAT, EPSU, ETF, IndustriALL Europe, UNI Europa	BWI, IndustriALL Global, ITF, IUF, PSI, UNI Global Union

Note: n.a: information not available.

Source: Eurofound's Network of European correspondents, 2016

Table A4: Collective bargaining and consultation – trade unions

	Name	Collective bargaining	Number of employees covered by the collective agreement	Consultation	Consultation pattern
AT	PRO-GE	SEB	325	Yes	On an ad hoc basis
	DPA-djp	SEB	183	n.a.	n.a.
BE	CGSLB/ ACLVB	SEB and MEB	n.a.	Yes	On a regular basis
	CCAS-CSC	SEB and MEB	1,200*	Yes	On an ad hoc basis
	SETCA/ BBTK	SEB and MEB	9,000**	Yes	On a regular basis
	FGTB-HORVAL	SEB and MEB	n.a.	Yes	On an ad hoc basis
	LBC-NVK/ CNE	MEB (national (cross-sectoral) sectoral/branch, and occupational)	n.a,	No	–
BG	FITU Food	MEB (intersectoral and sectoral/branch)	170	Yes	On an ad hoc basis
	FFDI-Podkrepa	MEB (intersectoral and sectoral/branch)	170	Yes	On an ad hoc basis
CZ	NOS PPP	SEB (company level)	n.a.***	Yes	On a regular basis
DE	NGG	MEB	More than 95% of the sectoral workers#	Yes	On a regular basis
DK	CO-industri	MEB (sectoral/branch)	450	Yes	On an ad hoc basis
EL	OEBZ	SEB (company agreement)	234	No	–
ES	FEAGRA-CCOO	MEB (sectoral/branch)	2,000	No	–
	FITAG-UGT	MEB (sectoral/branch)	2,000	n.a.	n.a.
FI	SEL	MEB (intersectoral)	120	No	–
	Pro	MEB(sectoral/branch)	250****	Yes	On an ad hoc

	Name	Collective bargaining	Number of employees covered by the collective agreement	Consultation	Consultation pattern
					basis
	Metalli	MEB (intersectoral)	50	No	–
	YTN	MEB (intersectoral)	n.a.	No	–
FR	FGA CFDT	Both SEB and MEB (branch/sector)	6,733*****	Yes	On an ad hoc basis
	FGTA-FO	Both SEB and MEB	6,733*****	No	–
	CFTC-CSFV	Both SEB and MEB (sectoral/branch)	6,733*****	No	–
	FNAF-CGT	Both SEB and MEB (sectoral/branch)	6,733*****	n.a.	n.a.
	CFE-CGC Agro alimentaire	Both SEB and MEB (sectoral/branch)	6,733*****	No	–
HR	PPDIV	SEB	There is no collective agreement in force, but expired collective agreements are still respected.	Yes	On an ad hoc basis
HU	ÉDSZ	SEB	280	No	–
IT	Flai-Cgil	SEB and MEB	approx. 1,000	Yes	On an ad hoc basis
	Fai-Cisl	SEB and MEB	approx. 1,000	Yes	On an ad hoc basis
	Uila-Uil	SEB and MEB	approx. 1,000	Yes	On an ad hoc basis
LT	LMP	SEB	230	Yes	On an ad hoc basis
NL	CNV	SEB, company	800 (2015)	No	–
	De Unie	SEB, company	800 (2015)	No	–
	FNV	SEB, company	800 (2015)	n.a	n.a.
PL	SPS NSZZ 'Solidarnosc'	SEB (company agreements)	n.a.	Yes	On an ad hoc basis
	FZZPPC	SEB (company agreements)	n.a.	Yes	On an ad hoc basis
PT	FESAHT	SEB (company agreements)	400	Yes	On a regular basis
	FETESE	SEB (company agreements)	n.a.	n.a.	n.a.
	SETAA	Not involved	n.a.	n.a.	n.a.
RO	SINDALIM ENTA-FSIA	Intersectoral – on food industry	about 157,930*******	Yes	On a regular basis

	Name	Collective bargaining	Number of employees covered by the collective agreement	Consultation	Consultation pattern
SE	IF Metall	SEB (company agreement) ******	approx. 300	n.a.	n.a.
	Ledarna	MEB (sectoral/branch) Negotiations take place at the central level between the trade union and the employer organisation	n.a.	No	–
	Naturvetarna	MEB (sectoral/branch)	n.a.	No	–
	Sveriges Ingenjörer	MEB (sectoral/branch) Negotiations take place at the central level between the trade union and the employer organisation	n.a.	No	–
	Unionen	MEB (sectoral/branch)	n.a.	No	–
SK	OZP SR	SEB and MEB	350	Yes	On an ad hoc basis
UK	GMB	SEB – company agreements	600	n.a.	n.a.
	Unite	SEB – company agreements	approx. 1,000	No	–

*Notes: * Refers to the whole food sector as there is no specific sugar sector listed in Belgium.*

*** For the whole food sector.*

**** NOS PPP itself does not conclude collective agreements in the sugar sector.*

***** The numbers do not match the number of those of the employer companies or those of the official statistics on aggregate employment. This is presumably due to a large number of seasonal workers whose work contribution has not been converted into entire full-time working years.*

****** As of 31 December 2013.*

******* The only company covered by the agreement is Nordic Sugar. The agreement covers Nordic Sugar's blue-collar workers.*

******** All the employees in food industry in general (including the sugar sector).*

 # According to CEFS, this should be 100%. Incorporation of comment in national report by Eurofound correspondent still pending.

n.a. = not available

Source: Eurofound's Network of European correspondents, 2016

Table A5: Employer organisations domain coverage and membership

	Organis-ation	Domain coverage	Type of membership	Total members (companies)	Members in the sector (companies)	Total number of employees in member companies	Total number of employees in sector-related member companies	Members in the largest companies
AT	FVNGI	Sectional overlap	Compulsory	220	1	26,500	508*	yes
BE	SUBEL	Overlap	Voluntary	2	2	More than 1,000	1,000+	yes
	FEVIA	Overlap	Voluntary	600	1	n.a.	n.a.	yes
BG	USSPP	Sectional overlap	Voluntary	80	1	1,000	80	no
CZ	ČMCS	Congruence	Voluntary	5	5	1,307	1,307	yes
DE	VdZ	Congruence	Voluntary	4	4	5,600****	5,600****	yes
DK	DI	Overlap	Voluntary	10,000	1	1,000,000	500	yes
ES	AGFAE	Sectionalism	Voluntary	2	2	2,557	2,557	yes
FI	ETL	Overlap	Voluntary	270	1	30,000	180	no
	Federation of Finnish Technology Industries	Sectional overlap	Voluntary	1,600	1	183,600	285**	no
FR	SNFS	Sectionalism	Voluntary	5	5	6,733	6,733	yes
HR	HUP	Overlap	Voluntary	6,000	2	600,000	540	yes
IT	Unionzucchero	Sectionalism	Voluntary	2	2	900	~ 900	yes
	Fedagri	Sectional overlap	Voluntary	3,000	n.a.	65,000	n.a.	yes
PL	ZPC	Congruence	Voluntary	4	4	3,383	~ 3,500	yes
RO	Patronatul Zaharului	Congruence	Voluntary	?	4	1,216	n.a.	yes
SE	IKEM	Overlap	Voluntary	1,400***	1	70,000	415	yes
SK	SCS	Sectionalism	Voluntary	2	2	322	322	yes

*Notes: * 31 August 2015; number provided by AGRANA as the FIAA did not provide numbers here on grounds of data protection)*

*** Number includes seasonal workers.*

**** 1,400 in total; 1,200 on the employer organisation side and 200 on the industry organisation side of IKEM.*

***** According to CEFS, there are 4,792 employees in member companies and in sector-related member companies (Source: Statistisches Bundesamt, 2015). Incorporation of comment into national report on Germany still pending.*

Source: Eurofound's Network of European correspondents, 2016

Table A6: Corporate members – domain coverage

	Organisation	Total number of employees	Total number of employees in country
AT	AGRANA	8,708	2,326
BE	ISCAL SUGAR	172	172
	RT (Les Raffineries Tirlemontoises/ Tiense Sukerijen)	522	522
BG	Zaharni Zavodi AD	800	800
DK	Nordic Sugar	1,500	500
EL	EBZ SA	234	234
FI	Nordic Sugar	1,500	180 (Suomen Sokeri) and 285 (Sucros)
HR	TSO	280	280
	TSV	270	270
HU	AGRANA SUGAR	2,326	280
IT	COPROB	600	600
	Eridania	500	500
	S.f.i.r.	130	130
LT	NSK (Nordic Sugar)	230	230
NL	Suiker Unie	900	776
PT	DAI	n.a.	n.a.
	SIDUL	212	212
	RAR	142	142
SE	Nordic Sugar AB	1,500	400*
SK	Slovenské cukrovary, a.s. Sereď	134	134
	POV (Nordic Sugar)	270**	270
UK	British Sugar	950***	950***

*Notes: * In addition, there are 75–80 temporary workers during harvest season.*

*** Inclusive personal leasing (80).*

**** In addition, there are around 800 seasonal workers during peak operational periods.*

Source: Eurofound's Network of European correspondents, 2016

Table A7: Domain description of employer organisations

	Name	Description
AT	FVNGI	Industrial enterprises in the food and drinks industry
BE	SUBEL	Sugar manufacturers
	FEVIA	Whole food and drink industry
BG	USSPP	Sugar and sugar products manufacturing in the region of Veliko Turnovo
CZ	ČMCS	Sugar Association
DE	VdZ	Sugar manufacturing
DK	DI	Manufacturing industry
ES	AGFAE	Sugar manufacturing
FI	ETL	Food and drink industry
	Teknologiateollisuusry	Electronics industry, machine industry, metal industry, metal refining, ICT and planning and consulting including the refining process
FR	SNFS	Sugar manufacturing in the metropolitan region (not overseas departments and territories)
HR	HUP	Food industry
IT	Unionzucchero	Sugar manufacturing (without manufacture of molasses and production of maple syrup and sugar)
	Fedagri	Cooperatives and private companies controlled by cooperatives in agriculture, fishery, forestry, food industry and storage of vegetable and fruits
PL	ZPC	Sugar manufacturing
RO	Patronatul Zaharului	Sugar manufacturing
SE	IKEM	Chemical sector at large, including chemical and plastics industries, pharmaceutical manufacturers or biochemistry and biotech companies
SK	SCS	Sugar manufacturing

Note: n.a. = not available

Source: Eurofound's Network of European correspondents, 2016

Table A8: Domain description of corporate members

	Name	Description
AT	AGRANA	Austrian food concern and multinational group, operating in the segments sugar industry, starch industry and the manufacture of fruit preparations and fruit juice concentrates, only company in the sugar sector in Austria
BE	ISCAL Sugar	Sugar manufacturing
	Les Raffineries Tirlemontoises	Sugar manufacturing and specialties
BG	Zaharni Zavodi AD	Sugar refinery, confectionery plant, ethyl alcohol distillery, printing house, own thermal power plant and repairing and mechanical plant
DK	Nordic Sugar	Sugar manufacturing
EL	EBZ SA	Sugar manufacturing, trade, import/export of sugar and sugar products
FI	Nordic Sugar	Sugar manufacturing
HR	TSO	Sugar manufacturing
	TSV	Sugar manufacturing
HU	AGRANA	Sugar manufacturing
IT	COPROB	Beet growers' cooperative
	Eridania	Sugar manufacturing and energy from biomass
	S.f.i.r.	Refining of raw sugar and energy from palm oil
LT	NSK	Sugar manufacturing
NL	Suiker Unie	Sugar manufacturing (without manufacture of molasses and production of maple syrup and sugar)
PT	DAI*	Sugar manufacturing
	SIDUL*	Sugar manufacturing
	RAR*	Sugar manufacturing
SE	Nordic Sugar AB	Sugar manufacturing, animal feed products and fibre products
SK	Slovenské cukrovary, a.s. Sered'	Sugar manufacturing (without production of maple syrup and sugar)
	POV	Sugar manufacturing (without production of maple syrup and sugar and sugar syrup)
UK	British Sugar	Sugar manufacturing

*Notes: * No employer organisation in Portugal. The companies DAI, SUDUL and RAR are not listed as corporate members of CEFS.*

n.a. = not available

Source: Eurofound's Network of European correspondents, 2016

Table A9: Affiliations of employer organisations

	Organisation	National affiliation	European affiliation	International affiliation
AT	FVNGI	Austrian Federal Economic Chamber (WKÖ)	FoodDrinkEurope	n.a.
BE	SUBEL	FEVIA	CEFS	n.a.
	FEVIA	UWE, VBO, Voka	Business Europe, FoodDrinkEurope	n.a.
BG	USSPP	BIA	none	n.a.
CZ	ČMCS*	AK ČR, FFDI/PK ČR	CEFS	n.a.
DE	VdZ	BDA, ANG	CEFS	n.a.
DK	Confederation of Danish Industry (DI)	Confederation of Danish Employers (DA)	Business Europe	BIAC
ES	AGFAE	FIAB	CEFS	n.a.
FI	ETL	EK	AEDIL, AIM, FoodDrinkEurope	n.a.
	Federation of Finnish Technology Industries	EK	none	n.a.
FR	SNFS	ANIA	CEFS	n.a.
HR	HUP Food Industry and Agriculture Association	Croatian Employers' Association (CEA)	Business Europe, FoodDrinkEurope, GEOPA-Copa	n.a.
IT	Unionzucchero	Confindustria	CEFS	n.a.
	Fedagri	Agrinsieme, Confcooperative	COGECA	ICA
PL	ZPC	Polish Committee of the International Commission for Uniform Methods of Sugar Analysis (ICUMSA), Federation of Polish Food Economy (Federacja Gospodarki Zywnosciowej)	CEFS, IIRB	n.a.
RO	Patronatul Zaharului	n.a.	CEFS	n.a.
SE	IKEM	Confederation of Swedish Enterprise	Cefic, ECEG, EuPC, Fecc	n.a.
SK	SCS	Únia potravinárov Slovenská, Slovenská poľnohospodárska a potravinárska komora	CEFS	n.a.

Notes: * *According to Czech law, ČMCS is not an employer organisation. However, it is affiliated to CEFS.*

n.a. = not available

Source: Eurofound's Network of European correspondents, 2016.

Table A10: Affiliation of companies and corporate members

	Organisation	National affiliation	European affiliation	International affiliation
AT	AGRANA	IV, WKÖ	CEFS	n.a.
BE	ISCAL SUGAR	FEVIA, SUBEL	CEFS	n.a.
	RT	FEVIA, SUBEL, VBO, Voka	CEFS	n.a.
BG	Zaharni Zavodi AD	BIA, USSPP	ASSUC, CEFS, ESRA	n.a.
DK	Nordic Sugar	DI	CEFS	n.a.
FI	Nordic Sugar	EK, ETL, Federation of Finnish Technology Industries	CEFS	n.a.
EL	EBZ SA (Hellenic Sugar Industry SA)	SEV	CEFS	n.a.
HR	TSO	CEA, Food Industry and Agriculture Association, HUP	CEFS	n.a.
	TSV	CEA, Food Industry and Agriculture Association, HUP	CEFS	n.a.
HU	AGRANA	WKÖ*	CEFS	n.a.
IT	COPROB	Fedagri (incl. Confcooperative), Unionzucchero (incl. Confindustria)	CEFS	n.a.
	Eridania	Unionzucchero (incl. Confindustria)	CEFS	n.a.
	S.f.i.r.	Confindustria	n.a.**	n.a.
LT	NSK (Nordic Sugar)	n.a.	CEFS	n.a.
NL	Suiker Unie	AWVN	CEFS	n.a.
PT	DAI	FIPA, CIP	ESRA***	n.a.
	SIDUL	FIPA, CIP	ESRA, ARAP	n.a.
	RAR	FIPA, CIP	ESRA	n.a.
SE	Nordic Sugar AB	IKEM, Swedish Food Federation	CEFS	WSRO
SK	Slovenské cukrovary, a.s. Sereď (Agrana Group)	Únia potravinárov Slovenská, Slovenská poľnohospodárska a potravinárska komora	CEFS	n.a.
	POV (Nordzucker Group)	Únia potravinárov Slovenská, Slovenská poľnohospodárska a potravinárska komora	CEFS	n.a.
UK	British Sugar	ADE, CEA, FDF, REA	CEFS, COGEN Europe, ePURE	WSRO

*Notes: * AGRANA Group is an Austrian company. The national contribution refers to the Austrian national organisation WKÖ for its national affiliation.*

*** No information given by author.*

**** DAI was a member until 12/2015.*

n.a. = not available.

Source: Eurofound's Network of European correspondents, 2016

Table A11: Collective bargaining and consultation – employer organisations

	Name	Form/ level of bargaining	Number of employees covered by bargaining	Consultation	Consultation pattern
AT	FVNGI	SEB	508	Yes	On a regular basis
BE	SUBEL	SEB and MEB	n.a.	Yes	n.a.
	FEVIA	MEB: national sectoral bargaining	90,000*	Yes	On a regular basis
BG	USSPP	MEB (intersectoral and sectoral/branch)	170	Yes	On an ad hoc basis
CZ	ČMCS	Not directly involved in sector-related bargaining**	0	n.a.	n.a.
DE	VdZ	MEB (sectoral bargaining)	More than 95% of the sectoral workers	No	–
DK	DI	MEB (sectoral bargaining)	500	Yes	On an ad hoc basis
ES	AGFAE	MEB (sectoral bargaining)	2,557	Yes	On a regular basis
FI	ETL	MEB (intersectoral)	190	Yes	On an ad hoc basis
	Teknologiateollisuus ry	MEB (intersectoral)	>100	n.a	n.a.
FR	SNFS	MEB	6,733***	Yes	On a regular basis (in the framework of Etablissement national des produits de l'agriculture et de la mer – France Agrimer)
HR	HUP	SEB	There are no collective agreements within the sector.	Yes	On an ad hoc basis
IT	Unionzucchero	SEB and MEB	~600	Yes	On a regular basis

	Name	Form/ level of bargaining	Number of employees covered by bargaining	Consultation	Consultation pattern
	Fedagri	MEB (sectoral/branch, regional/local)	~600	Yes	On a regular basis
PL	ZPC	Not engaged in sector-related bargaining	–	Yes	On a regular basis
RO	Patronatul Zaharului	There is no collective bargaining/contract in the sector, the sector is covered by the food industry larger sector – and also the collective contracts	n.a.	Yes	On a regular basis
SE	IKEM	SEB and MEB	415	No	–
SK	SCS	MEB (sectoral/branch)	322	No	–

*Notes: * In the whole food sector.*

*** ČMCS is not an employer organisation (according to Czech law) and is not involved in collective bargaining. However, some of its members conclude company-level collective agreements.*

**** As of 31 December 2013.*

n.a. = not available

Source: Eurofound's Network of European correspondents, 2016

Table A12: Collective bargaining and consultation – corporate members

	Name	Involved in sector-related collective bargaining	Covered by collective agreement, form/ level	Number of employees covered by bargaining	Consultation	Consultation pattern
AT	AGRANA	No	Single-employer/ Company-level agreement (negotiated by FVNGI)	508	Yes	On a regular basis
BE	ISCAL Sugar	Yes	Both SEB and MEB	172 (FTE)	Yes	On an ad hoc basis
	Les Raffineries Tirle-montoises	Yes	Both SEB and MEB	522 (FTE)	Yes	On a regular basis
BG	Zaharni Zavodi AD	Yes	MEB (sectoral/branch)	80	Yes	On an ad hoc basis
DK	Nordic Sugar	No	MEB (sectoral bargaining)	500	Yes	On an ad hoc basis
EL	EBZ SA	Yes	SEB	234	No	–
FI	Nordic	No	MEB	470*	Yes	On an ad hoc

	Name	Involved in sector-related collective bargaining	Covered by collective agreement, form/ level	Number of employees covered by bargaining	Consultation	Consultation pattern
	Sugar		(intersectoral)			basis
HR	TSO	Yes	No, there is no collective agreement in force but collective agreements are still respected. Currently there are negotiations on future collective agreement.	n.a.	Yes	On a regular basis
	TSV	Yes	No, there is no collective agreement in force but collective agreements are still respected. Currently there are negotiations on future collective agreement.	n.a.	Yes	On a regular basis
HU	Magyar Cukor Zrt. (Agrana Sugar Ltd)	Yes	SEB	280	Yes	On a regular basis
IT	COPROB	Yes	Both SEB and MEB	600	n.a.	n.a.
	Eridania	Yes	SEB (company level)	~500	n.a.	n.a.
	S.f.i.r.	Yes	SEB (company level)	~130	n.a.	n.a.
LT	NSK	Yes	SEB (company level)	~230	Yes	On an ad hoc basis
NL	Suiker Unie	Yes	Single-employer/ company-level agreement	900 (2015)**	Yes	On a regular basis
PT	DAI***	Yes	Single-employer/ company-level agreement (company)	135 (2013)	n.a.	n.a.
	SIDUL***	Yes	Single-employer/ company-level agreement	199 (2012)	n.a.	n.a.

	Name	Involved in sector-related collective bargaining	Covered by collective agreement, form/ level	Number of employees covered by bargaining	Consultation	Consultation pattern
			(company)			
	RAR***	Yes	Single-employer/ company-level agreement (company)	217 (2010)	n.a.	n.a.
SE	Nordic Sugar AB	Yes	SEB and MEB (single-employer for blue-collar workers and multiemployer for white-collar workers)	~400	Yes	n.a.
SK	Slovenské cukrovary, a.s. Sereď	Yes	Both single- and multiemployer agreement	n.a.	n.a.	n.a.
	POV	Yes	Both single and multiemployer agreement	190	No	-
UK	British Sugar	Yes	Single-employer – company-level agreement (company)	~875	Yes	On a regular basis

*Notes: * Including seasonal workers.*

*** This number includes employees at head office.*

**** This company is not a member of CEFS.*

FTE = full-time equivalents; n.a. = not available

Source: Eurofound's Network of European correspondents, 2016

Table A13: Organisation names and abbreviations – trade unions

	Abbreviation	Full organisation name in English
AT	PRO-GE	Manufacturing Union
	GPA-dip	Union of Salaried Private Sector Employees, Graphical Workers and Journalists
BE	CGSLB/ACLVB	Federation of Liberal Trade Unions of Belgium
	CCAS-CSC alimentation et services/ACV voeding en diensten	Professional Association for Food and Services
	SETCA/BBTK	Belgian Union of White-Collar Staff, Technicians and Managers
	FGTB-HORVAL	Food–Horeca (Hotel, Restaurant, Cafés) – Services branch trade union (Member of the Belgian General Federation of Labour)
	LBC-NVK/CNE	National Federation of White-Collar workers
BG	FITU Food	Federation of Independent Trade Union in the Food Industry

	Abbreviation	Full organisation name in English
	FFDI-Podkrepa	Federation 'Food and drink industry' at CL 'Podkrepa'
CZ	NOS PPP	Independent Trade Union of Workers in the Food Industry and Allied Trade of Bohemia and Moravia
DE	NGG	Trade Union of Food, Beverages, Tobacco, Hotel and Catering and Allied Workers
DK	CO-industri	Central Organisation of Industrial Employees in Denmark
EL	OEBZE	Federation of Employees of the Hellenic Sugar Industries
ES	FEAGRA-CCOO	Federation of Agro Food of the Trade Union Confederation of Workers' Commissions
	FITAG-UGT	Federation of Industry and Farmer Workers of the General Workers' Unions
FI	SEL	Finnish Food Workers' Union
	Pro	Trade Union Pro
	Metalli	Finnish Metal Workers' Union
	YTN	Federation of Professional and Managerial Staff
FR	FGA CFDT	General Federation of Agrofood Industry – French Democratic Confederation of Labour
	FGTA-FO	General Federation of Workers from Agriculture, Agrofood industry, Tobacco and Related Activities – General Confederation of Labour – Force Ouvrière
	CFTC-CSFV	Retails, Services, Sales Federation – French Christian Workers' Confederation
	FNAF-CGT	National federation of Agrofood and forestry industries – General Confederation of Labour
	CFE-CGC Agro alimentaire	CFE-CGC Agrofood industry
HR	PPDIV	Trade Union of the Employed in Agriculture, Food, Tobacco and Water Industries of Croatia
HU	ÉDSZ	Food Industry Employees' Trade Union
IT	Flai-Cgil	Agrifood Industry Workers' Federation
	Fai-Cisl	Federation of Agriculture and Food Industry Workers
	Uila-Uil	Italian Agrifood Industry Workers' Union
LT	LMP	Lithuanian Trade Union of Food Producers
NL	CNV	National Federation of Christian Trade Unions
	De Unie	The Union
	FNV	Federation of Dutch Trade Unions
PL	SPS NSZZ 'Solidarnosc'	Food Workers' Secretariat of the Independent Self-governing Trade Union 'Solidarity'
	FZZPPC	Federation of Sugar Industry Workers' Trade Unions
PT	FESAHT	Federation of Unions in Agriculture, Food and Beverages Industries, Hotels and Tourism of Portugal

	Abbreviation	Full organisation name in English
	FETESE	Federation of Service Workers' and Technicians' Unions
	SETAA	Union of Agriculture, Food and Forests
RO	SINDALIMENTA-FSIA	Federation of Unions in the Food Industry – Sindalimenta-FSIA
SE	IF Metall	The Union of Metal Workers
	Ledarna	The Confederation of Executives and Managerial Staff
	Naturvetarna	The Swedish Association of Professional Scientists
	Sveriges Ingenjörer	Swedish Association of Graduate Engineers
	Unionen	Unionen
SK	OZ potravinárov SR	Slovak Trade Union of Food Workers
UK	GMB	General, Municipal, Boilermakers and Allied Trade Union
	Unite	Unite the Union

Source: Eurofound's Network of European correspondents, 2016

Table A14: Organisation names and abbreviations – employer organisations

	Name	Full name in English
AT	FVNGI	FIAA (Food Industries Association of Austria)
BE	SUBEL	General Association of Belgian Sugar Manufacturers
	FEVIA	Federation of Food Industries
BG	USSPP	Union of Sugar and Sugar Products Producers
CZ	ČMCS	Czech-Moravian Sugar Association*
DE	VdZ	Association of the Sugar Industry
DK	DI	Confederation of Danish Industry
ES	AGFAE	General Association of Sugar Manufacturers of Spain
FI	ETL	Finnish Food and Drink Industries' Federation
	Teknologiateollisuus ry	Federation of Finnish Technology Industries
FR	SNFS	Sugar Manufacturers National Union
HR	HUP	Croatian Employers' Association (CEA) – Food Industry and Agriculture Association
IT	Unionzucchero	Italian Sugar Producers Association
	Fedagri	National Federation of Agricultural and Agrofood Cooperatives
PL	ZPC	Association of Sugar Producers in Poland
SE	IKEM	Innovation and Chemical Industries in Sweden
SK	SCS	The Slovak Association of Sugar Producers

*Notes: * Not an employer organisation according to Czech law.*

n.a. = not available

Source: Eurofound's Network of European correspondents, 2016

Table A15: Organisation names and abbreviations – corporate members

	Name	Full name in English
AT	AGRANA	–
BE	ISCAL Sugar	–
	Les Raffineries Tirlemontoises	–
BG	Zaharni Zavodi AD	–
DK	Nordic Sugar	–
EL	EBZ SA	Hellenic Sugar Industry SA
FI	Nordic Sugar	–
HR	TSO	Sugar factory Osijek
	TSV	Sugar factory Viro, Virovitica
HU	Magyar Cukor Zrt. (Agrana Sugar Ltd)	AGRANA SUGAR Ltd
IT	COPROB	Beet growers' cooperative
	Eridania	–
	S.f.i.r.	S.f.i.r. Brindisi Refinery
LT	NSK	Nordic Sugar Kedainiai
NL	Suiker Unie	Sugar Union, subsidiary of Koninklijke Coöperatie Cosun U.A. (Royal Cooperation Cosun Excluded Liability)
PT	DAI	Society for Agro-Industrial Development
	RAR	RAR – United Sugar Refineries
	SIDUL	SIDUL Sugars
SE	Nordic Sugar AB	–
SK	Slovenské cukrovary, a.s. Sereď	–
	POV (Považský cukor a.s Trenčianska Teplá)	–
UK	British Sugar	–

Source: Eurofound's Network of European correspondents, 2016

Note: n.a. = not available

Table A16: Bipartite and tripartite bodies in the sugar sector, 2016

	Name and scope of activity	Character	Origin	Trade union organisations represented	Employer organisations represented
BG	Sectoral Council for Tripartite Cooperation in Food industry, Ministry of Economy	Tripartite	Statutory	FITU Food, FFDI-Podkrepa	USSPP
DK	Industriens Fællesudvalg Joint Vocational Training Committee for Education in Manufacturing Industry	Bipartite	Statutory	3F	DI
	Industriens Branchearbejdsmiljøråd, I-BAR The Sectoral/Branch Working Environment Council of Manufacturing Industry	Bipartite	Statutory	CO-industri 3F Dansk Metal Fødevareforbundet, NNF Danish Electricians' Union, DEF Union of Clerical and Commercial Workers, HK Teknisk Landsforbund, TL	DI Organisation of Managerial and Executive Staff, LH Danish Fashion & Textile
FI	Elintarvikealojen työalatoimikunta (Työturvallisuuskesku) (Centre for Occupational Health's Occupational Safety Sector Group Food Industries)	Tripartite	Agreement	Dairy Sector Professionals MVL Trade Union Pro Federation of Professional and Managerial Staff YTN SEL	ETL
	Elintarvikealan koulutustoimikunta (National Education and Training Committee for the Food Sector)	Tripartite	Statutory	Confederation of Unions for Professional and Managerial Staff in Finland (Akava) Trade Union of Education (OAJ) Central Organisation of Finnish Trade Unions SAK Finnish Confederation of Professional STTK	Confederation of Finnish Industries EK
FR	CPNE (Commission paritaire	Bipartite	Agreement and statutory	FGA CFDT, FNAF) CGT, FGTA-FO, CFTC-	SNFS

	Name and scope of activity	Character	Origin	Trade union organisations represented	Employer organisations represented
	nationale de l'emploi) National Paritarian Employment Commission (professional training, forecasts of employment and skills)			CSFV, CFE-CGC Agro	
	COPANIEF Commission paritaire nationale d'information économique, de l'emploi et de la formation National Paritarian Commission for Economic Information, Employment and Training (professional training, employment and skills forecast)	Bipartite	Agreemen t	FGA CFDT, FNAF), CGT, FGTA-FO, CFTC-CSFV, CFE-CGC Agro	SNFS
IT	Ente bilaterale di settore (EBS) Food industry - Sectoral Paritarian Institution	Bipartite	Agreement	Flai-Cgil Fai-Cisl Uila-Uil	Aidepi Aiipa Airi Ancit Anicav Assalzoo Assica Assitol Assobibe Assobirra Assocarni Assolatte Unionzucchero AssoDistil Federvini Italmopa Mineracqua Una
	Organismo bilaterale nazionale per la formazione nell'industria alimentare (OBA) National Vocational Training Paritarian Institution for the Food Industry	Bipartite	Agreement	Flai-Cgil Fai-Cisl Uila-Uil	Aidepi Aiipa Airi Ancit Anicav Assalzoo Assica Assitol Assobibe

	Name and scope of activity	Character	Origin	Trade union organisations represented	Employer organisations represented
					Assobirra Assocarni Assolatte Unionzucchero AssoDistil Federvini Italmopa Mineracqua Una
	Fondo sanitario integrativo di settore (FASA) Supplementary Healthcare Fund for Workers of the Food Industry	Bipartite	Agreement	Flai-Cgil Fai-Cisl Uila-Uil	Aidepi Aiipa Airi Ancit Anicav Assalzoo Assica Assitol Assobibe Assobirra Assocarni Assolatte Unionzucchero AssoDistil Federvini Italmopa Mineracqua Una
	Ente bilaterale nazionale formazione e ambiente (COOP FORM) National Paritarian Institution for Vocational Training and Environment	Bipartite	Agreement	Cgil Cisl Uil	AGCI Legacoop Confcooperative
	Comitato paritetico nazionale per la sicurezza e la salute nei luoghi di lavoro National Paritarian Committee for Health Care and Safety at the Workplace	Bipartite	Agreement	Cgil Cisl Uil	AGCI Legacoop Confcooperative

Source: Eurofound's Network of European correspondents, 2016

Table A17: Number of sugar manufacturing companies in 2008 and 2013

Number of sugar manufacturing companies as defined in NACE Rev. 2, Division 10.81 including one-person companies and self-employed					Number of sugar manufacturing companies according to CEFS		
Country	**Number of companies**		**Change (%)**	**Source and comments**	**Number of companies**		**Change (%)**
	2008	**2013**			**2007–2008**	**2014–2015**	
AT	1	1	0%	Statistics Austria, data for 2015	1	1	0%
BE	2	2	0%	Fevia.be, Subel.be, CBB.be, Annual accounts from les Raffineries Tirlemontoises/TienseSukerijen	2	2	0%
BG	7	4	-42.86%	National Statistical Institute	7	6	-14%
CZ	5	5	0%	Ministry of Agriculture of the Czech Republic (Ministerstvo zemědělství České republiky, MZe), 5 companies with 7 sugar refineries	5	5	0%
DE	14	10	-28.57%	Federal Statistical Office	6	5	-17%
DK	2	5	+150%	Statistics Denmark, Firmastatistikken, GF, special run	1	1	0%
EL	1	1	0%	There is no statistical data for sector 10.81 in Greece. However, the national contribution mentions one sole sugar producer for both years.	1	1	0%
ES	2	2	0%	Social partners' info, Eurostat, 2008: 2 main companies (manufacturer of sugar), 41 enterprises; 2013: 2 main companies (manufacturer of sugar), 33 enterprises	2	2	0%
FI	3	3	0%	Statistics Finland	1	1	0%
FR	8	6	-25%	SNSF (Eurostat: 2009: 23 establishments, 2012: 22 establishments)	9	8	-11%
HR	7	5	-28.57%	Croatian Bureau of Statistics, Reference year is 2014, in both years only companies registered by Croatian Bureau of Statistics are considered.	5	5	0%
HU	1	1	0%	agrana.hu	2	1	-50%
IT	26	12	-53.85%	Istat, National Structural Business Statistics	5	4	-20%
LT	2	2	0%	Eurostat, annual detailed enterprise statistics for industry	2	2	0%

Number of sugar manufacturing companies as defined in NACE Rev. 2, Division 10.81 including one-person companies and self-employed					Number of sugar manufacturing companies according to CEFS		
Country	Number of companies		Change (%)	Source and comments	Number of companies		Change (%)
	2008	2013			2007–2008	2014–2015	
LV	2	0	-100%	CSP yearly survey of enterprises and institutions	0	0	N/A
NL	1	1	0%	Interviews with social partners	2	1	-50%
PL	32	9	-71.87%	Eurostat	5	5	0%
PT	6	7	+16.66%	Eurostat	3	4	33%
RO	17	14	-17.65%	National Institute for Statistics TEMPOONLINE	6	6	0%
SE	5	5	0%	Statistics Sweden, Statistical business register	2	1	-50%
SK	6	11	+83.33%	Statistical Register of organisations, Statistical Office of the Slovak Republic)	2	2	0%
UK	2	2	0%	Eurofound national correspondent in the UK (British Sugar, Tate & Lyle Sugars)	2	2	0%

Note: Data provided by national statistical sources do not always refer to companies but sometimes to enterprises or undertakings. Eurostat data refer to enterprises defined as 'the smallest combination of legal units that is an organisational unit producing goods or services, which benefits from a certain degree of autonomy in decision-making, especially for allocating its current resources. An enterprise carries out one or more activities at one or more locations. An enterprise may be a sole legal unit.'

Disclaimer: As there are no clarifications providing an understanding for the differences or the changes over time, these numbers have to be used with extreme caution as pointed out by CEFS.

Source: Eurofound's Network of European correspondents, 2016 and CEFS 2016. For a detailed description of sources, please refer to the national contributions available on request from Eurofound.

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